Uploading Documents Using the Microsoft Outlook Plugin

Summary

Aeronet offers the ability to upload email attachments directly into Aerotrac's order repository from Microsoft Outlook. Once installed, this feature will be allowed for users working remotely or in the office.
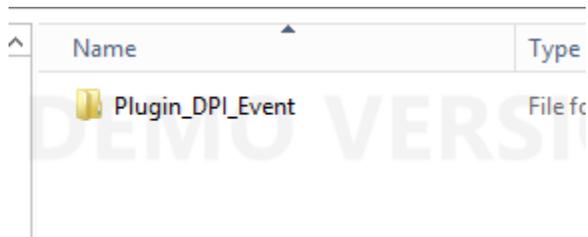
Prerequisites

- Microsoft Outlook 2013 or newer
- Internet access
- Valid Aeronet email account

Installation Setup

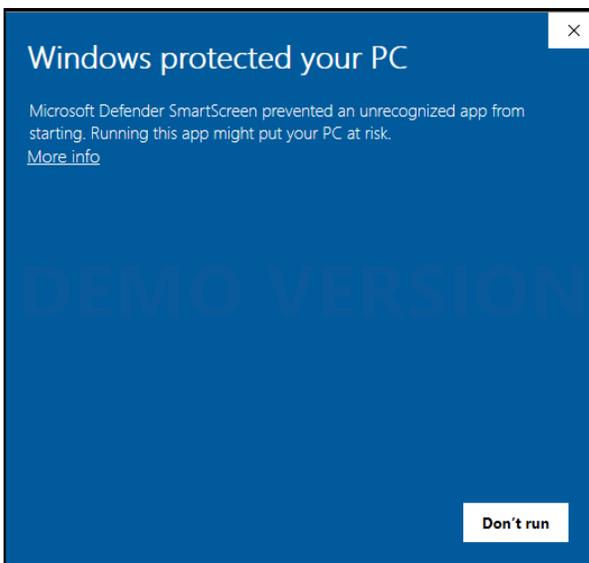Below are the steps on how to install the Microsoft Outlook Plug-in:

1. Close Microsoft Outlook (if open).
2. Go to the T:\Software drive on your computer. If you do not have access to the 'T' drive, contact ITSupport@Aeronet.com.
3. Copy the ZIP file "AeronetOutlook_VersionUpdate_V2.zip" to a directory on your computer.
4. Double-click the ZIP file. This will open up another window displaying this file:

5. Go into that directory.
6. Once in the directory, you should see two files:

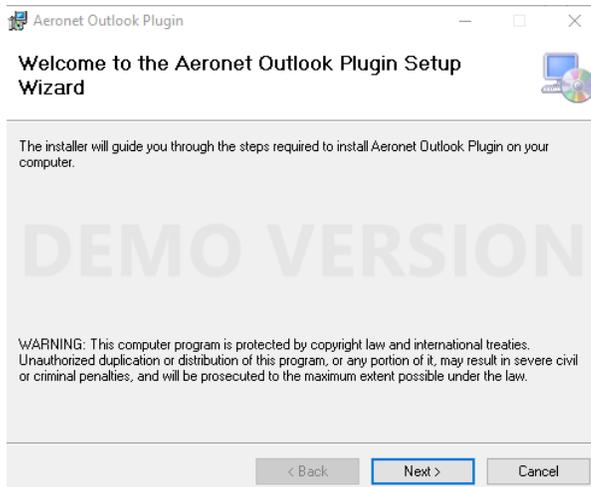| Name	Date modified
AeronetOutlookPluginSetup(1.0.0).msi	4/8/2021 12:08 PM
setup.exe	4/8/2021 12:08 PM

7. Double-click the 'Setup.exe' file.
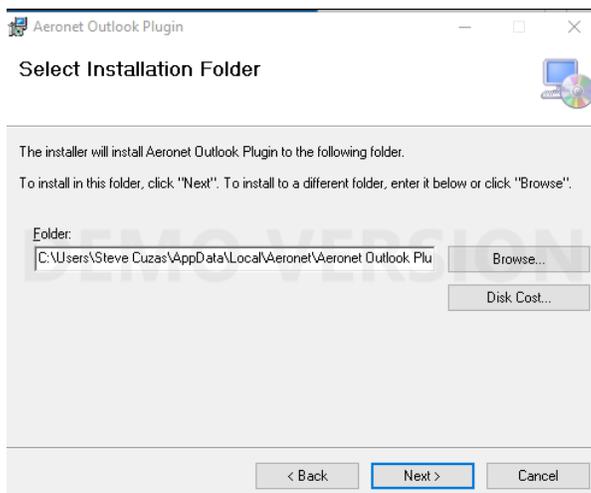8. You may be presented with this message:

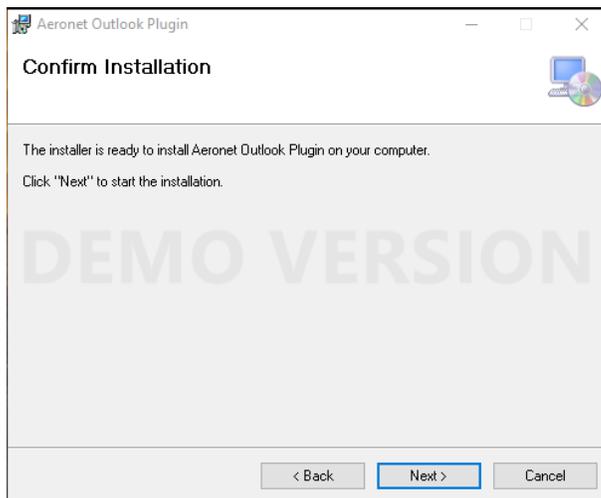9. Click the 'More info' link within the message, and you will see this:

10. Click <Run anyway>.
11. You will get this screen:
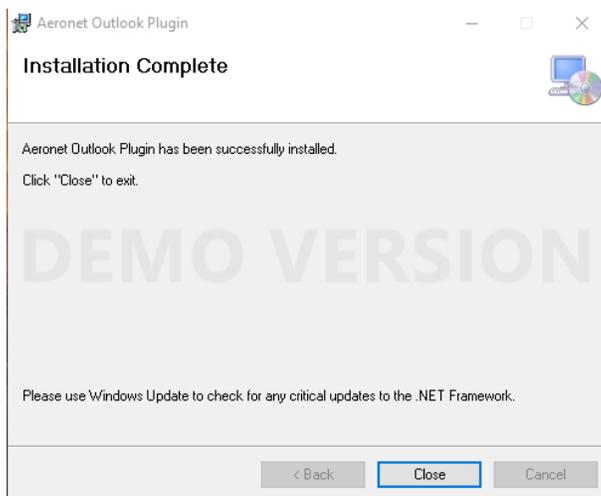

12. Click <Next>.

13. Click <Next>.

14. Click <Next>.
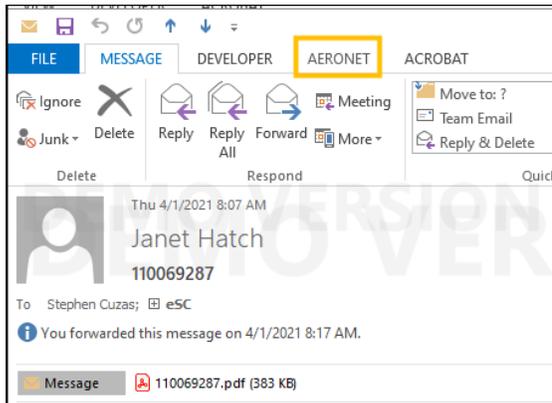15. Once installation is complete, you will see this:
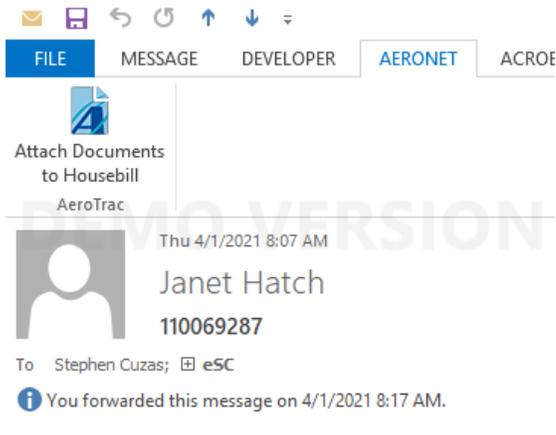

16. Click <Close>. The plug-in has been installed.

How It Works

Once the plug-in is installed, open Microsoft Outlook and double click on an email that has attachments that need to be uploaded to Aerotrac.

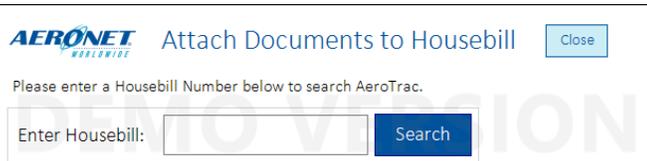1. In the email message, there will be a menu labeled 'AERONET':

2. Click on <Attach Documents to Housebill>.

3. Once clicked, this will display:

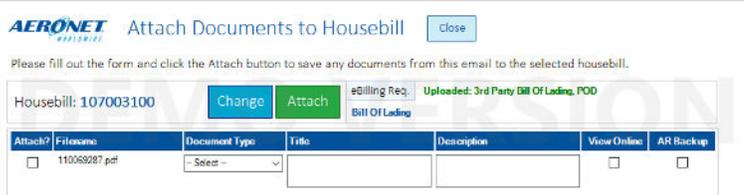4. Input the housebill number to which the attachment should be uploaded, then click <Search>.

5. If housebill is valid in Aerotrac, the user will be presented with data entry points for each attachment in the email.

6. The user then needs to:
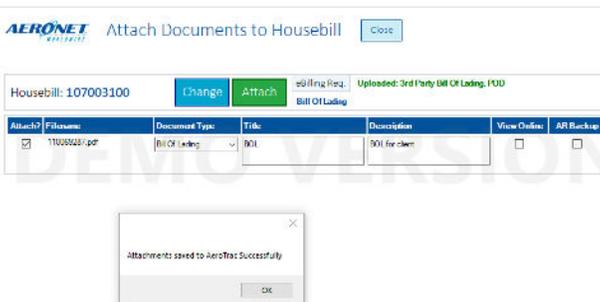   a. Select the checkbox of the file they want to upload.
   b. Select the 'Document Type.'
   c. Enter a 'Title' and 'Description.'
   d. Select the checkbox showing whether the document is viewable online ('View Online').
   e. Select the checkbox if the item is part of 'AR Backup.' *(Note: If the document type selected is an 'eBilling Required' document, the AR Backup checkbox will automatically be selected.)*
7. Once all information is entered, click <Attach>. Once successful, this will display:

8. When you look in Aerotrac, the upload will appear instantly: