



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.

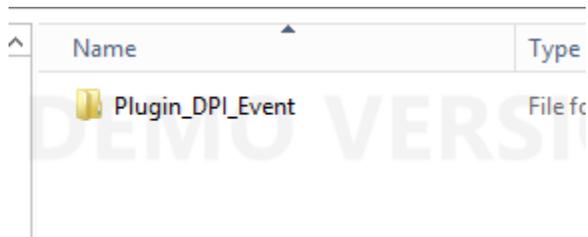
Prerequisites

- 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:

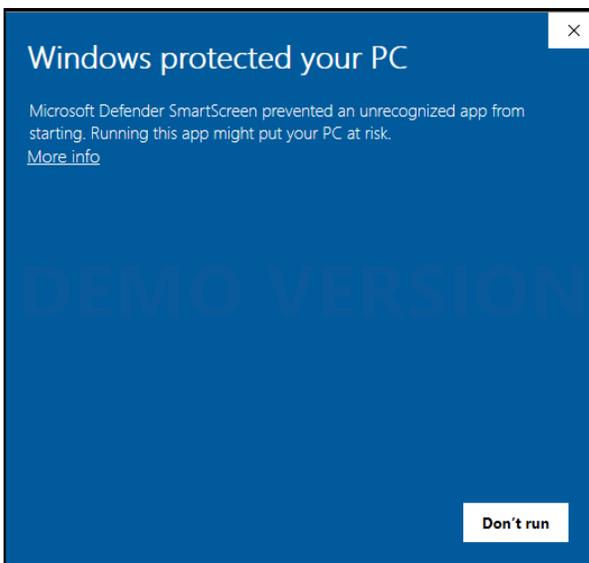
1. Close Microsoft Outlook (if open).
2. Go to the T:\Software drive on your computer. If you do not have access to the 'T' drive, contact ITSupport@Aeronet.com.
3. Copy the ZIP file "AeronetOutlook_VersionUpdate_V2.zip" to a directory on your computer.
4. Double-click the ZIP file. This will open up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

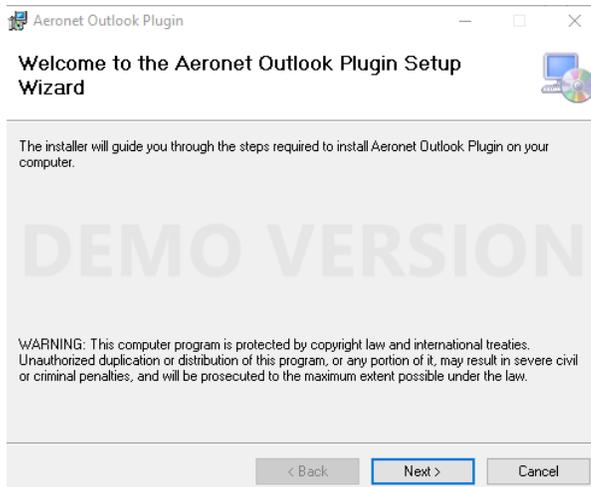
7. Double-click the 'Setup.exe' file.
8. You may be presented with this message:



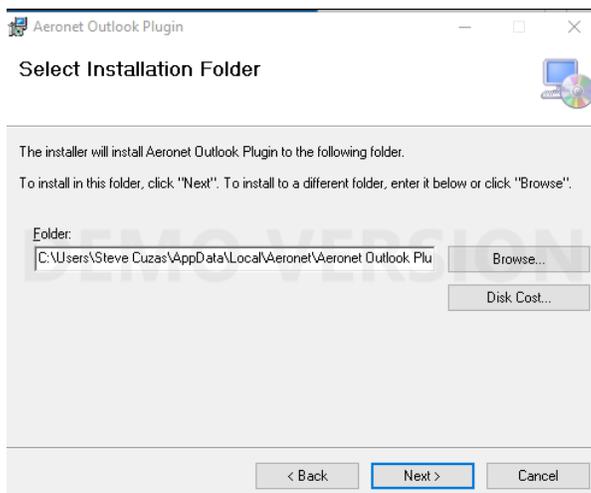
9. Click the 'More info' link within the message, and you will see this:



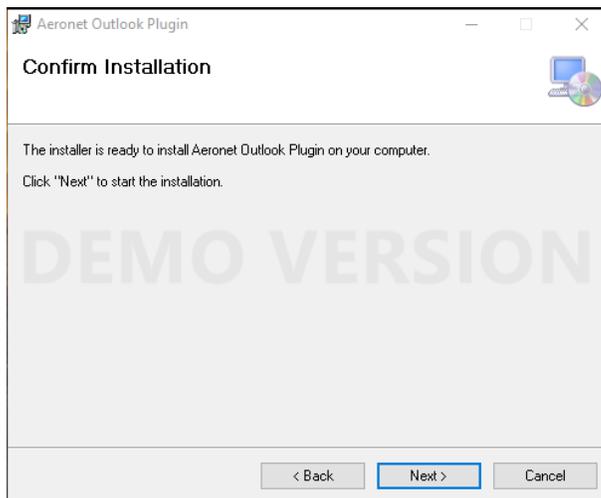
10. Click <Run anyway>.
11. You will get this screen:



12. Click <Next>.

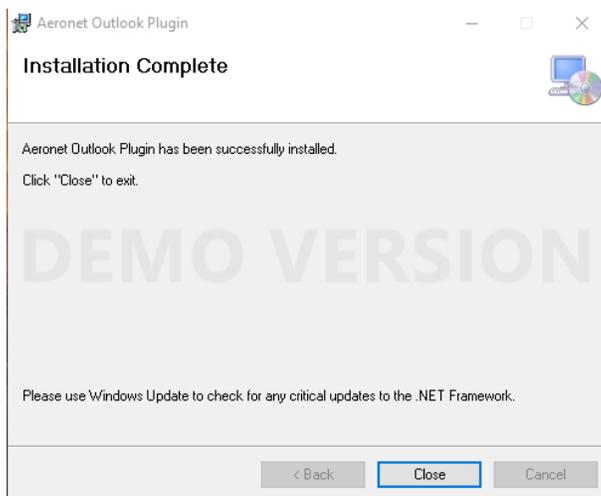


13. Click <Next>.



14. Click <Next>.

15. Once installation is complete, you will see this:

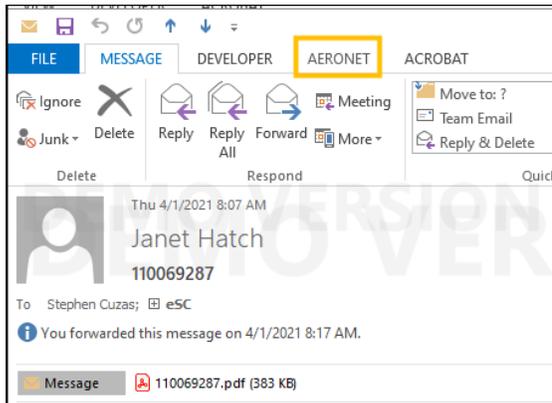


16. Click <Close>. The plug-in has been installed.

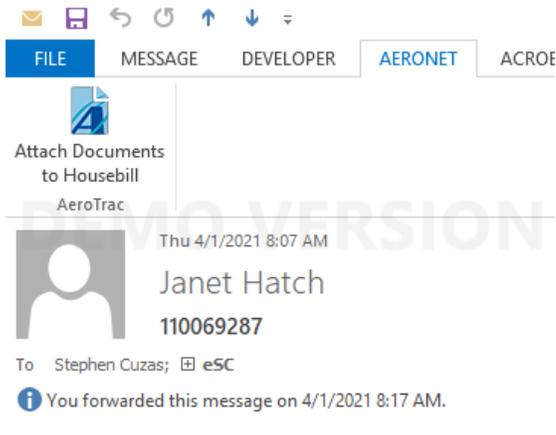
How It Works

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':



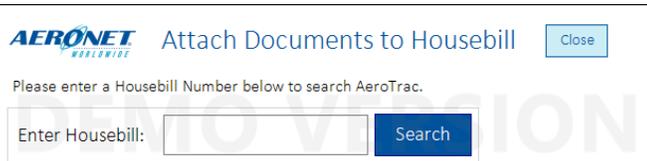
2. Click on <Attach Documents to Housebill>.



3. Once clicked, this will display:



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

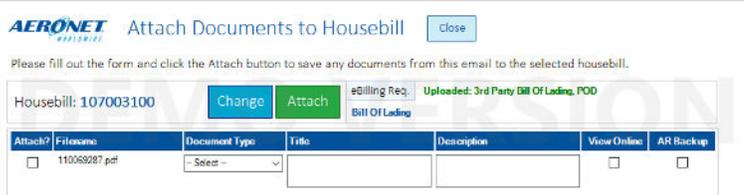


AERONET Attach Documents to Housebill Close

Please enter a Housebill Number below to search AeroTrac.

Enter Housebill: Search

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



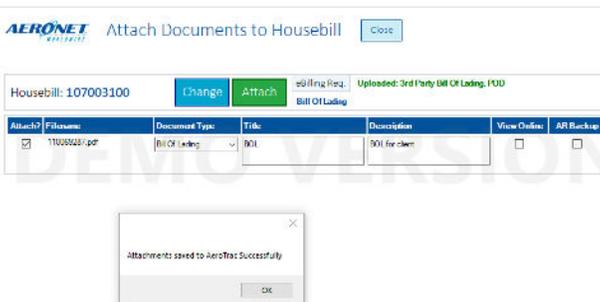
AERONET Attach Documents to Housebill Close

Please fill out the form and click the Attach button to save any documents from this email to the selected housebill.

Housebill: 107003100 Change Attach eBilling Req. Uploaded: 3rd Party Bill Of Lading, POB
Bill Of Lading

Attach?	Filename	Document Type	Title	Description	View Online	AR Backup
<input type="checkbox"/>	110059287.pdf	Select --			<input type="checkbox"/>	<input type="checkbox"/>

- The user then needs to:
 - Select the checkbox of the file they want to upload.
 - Select the 'Document Type.'
 - Enter a 'Title' and 'Description.'
 - Select the checkbox showing whether the document is viewable online ('View Online').
 - 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.)
- Once all information is entered, click <Attach>. Once successful, this will display:



AERONET Attach Documents to Housebill Close

Housebill: 107003100 Change Attach eBilling Req. Uploaded: 3rd Party Bill Of Lading, POB
Bill Of Lading

Attach?	Filename	Document Type	Title	Description	View Online	AR Backup
<input checked="" type="checkbox"/>	110059287.pdf	Bill Of Lading	BOI	BOI for client	<input type="checkbox"/>	<input type="checkbox"/>

Attachments saved to AeroTrac Successfully OK

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

UPLOADED DOCUMENTS 107003100

Housebill: 107003100

Document Removed Successfully.

Document is viewable online:

Document is for eBilling AR Backup: (AR Documents must be in PDF format).

Document Type:

Document Title:

Upload Document: No file chosen
(max size is 500K)

Document Description	eBilling Document Requirements
Document	Uploaded Y/N
3rd Party Bill Of Lading	<input type="checkbox"/>
Bill Of Lading	<input type="checkbox"/>
POD	<input type="checkbox"/>

To download to your computer, right-click on the "Download" button and choose "Save Target As".
Rows in **YELLOW** indicate the document is for eBilling AR backup.

View File	AR Backup/Available Online	Type	Title	Description	Uploaded By	Date Uploaded	Edit	Remove
<input type="button" value="Download"/>	True	False	Bill Of Lading	BOL for client	Dices, Steppers	04/03/2021	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>