EbLink User Guide

Updated: September 13, 2016

Contents

Introduction to EbLink

EbLink is an add-in designed to help Outlook users accomplish three things:

1. Push your individual Outlook contacts, companies, artists and/or venues from Outlook to your organization's EventBooking address book.

2. Push your Outlook emails to contacts, companies, artists and/or venues in your organization's EventBooking address book.

3. Push your Outlook emails to events and sales opportunities on your EventBooking calendar.

Please note:

- Our EbLink add-in is designed to work with Outlook 2007 and later. It cannot be installed on earlier versions of Outlook.

- The EbLink add-in is subscribed to on a company-wide basis.

- EbLink stays logged in for 12 hours at a time before logging you out.

- Email attachments up to 2MB can also be uploaded. Attachments larger than 2MB are not supported.

Installing EbLink

Have your system administrator contact support@eventbooking.com to purchase and install the EbLink add-in for Outlook.

See separate installation guide for instructions once your company has purchased the EbLink add-in.
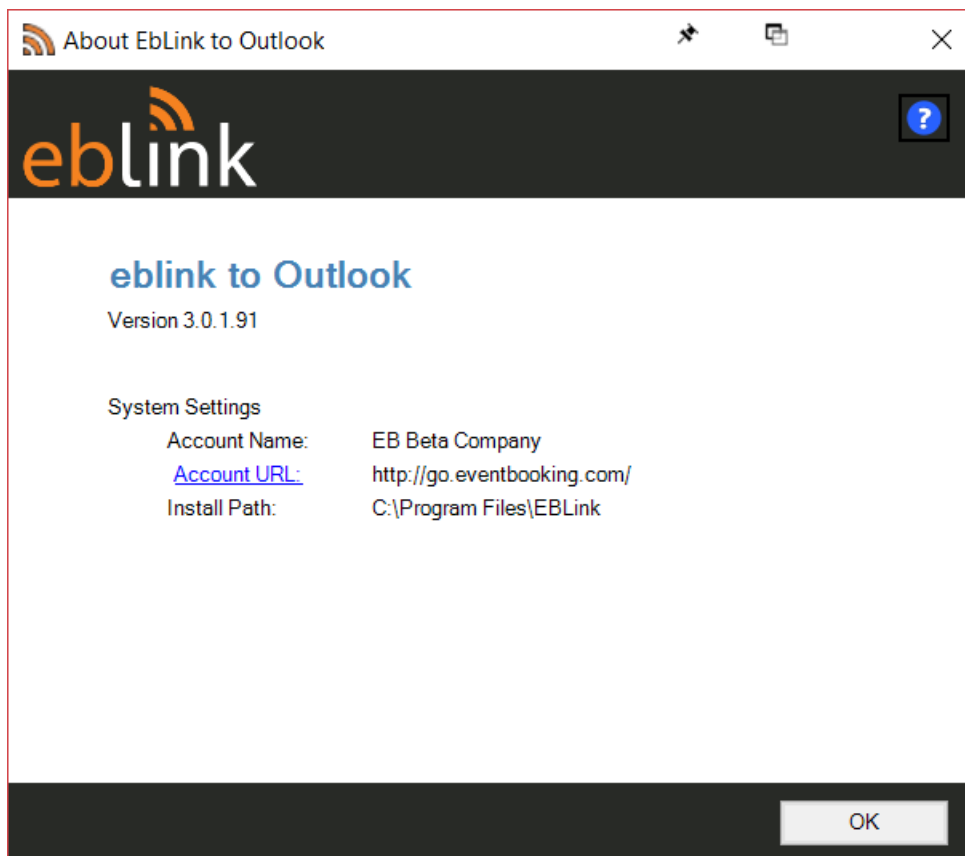
Getting Help for EbLink

If you experience issues with EbLink:

1. Click the **EventBooking** tab on the menu ribbon.
2. Click **About**.
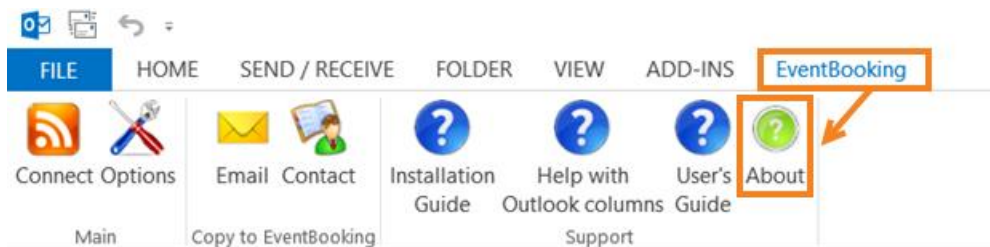
3. The pop-up will provide the EventBooking support team member with needed information for troubleshooting your issue.
4. Contact EventBooking support by calling 865.966.4900 or emailing support@eventbooking.com.
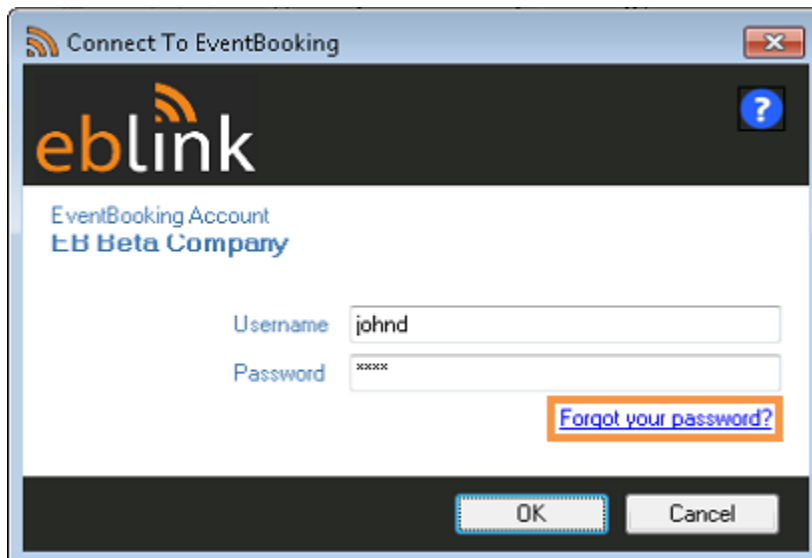
Problems Logging In?

If your login credentials are not correct, you will receive an error when trying to log in.
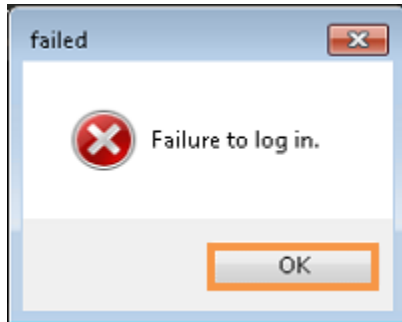
If you receive this error, click **OK** and retype your username and password. If you do not remember your username or password, you can click **Forgot your password?** to have your password reset.


If you know that your username and password are correct but you are still unable to log in, there is a chance that your organization has not purchased the Outlook add-in. Please have your system administrator contact EventBooking support via email at support@eventbooking.com or via phone at 865.966.4900.

Setting Default Permissions for EbLink

When you upload an email to EventBooking, you also control which other users on your account can see it. You can choose to make the emails (1) private and for your eyes only or (2) shared with a select group of permission profiles that other users in your organization have. If you frequently share messages with the same permission groups in EventBooking, you may want to set default message permissions.

To set default message permissions:

1. Click the **EventBooking** tab on the menu ribbon.
2. Click **Options**.
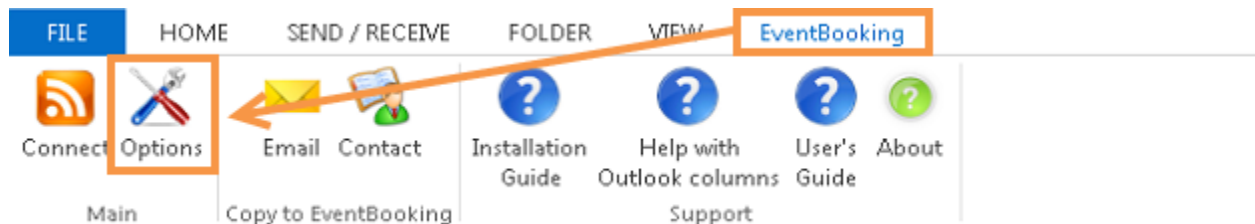
3. Check the boxes next to the permission profiles that you would like to have selected by default.

   Note: You will always be able to override the defaults you have set for individual emails and contacts.

4. Click **OK**.

   Note: These defaults only apply to your own instance of EbLink and not to other EventBooking users on your account who may also be using EbLink. All EbLink users must set up their own defaults.
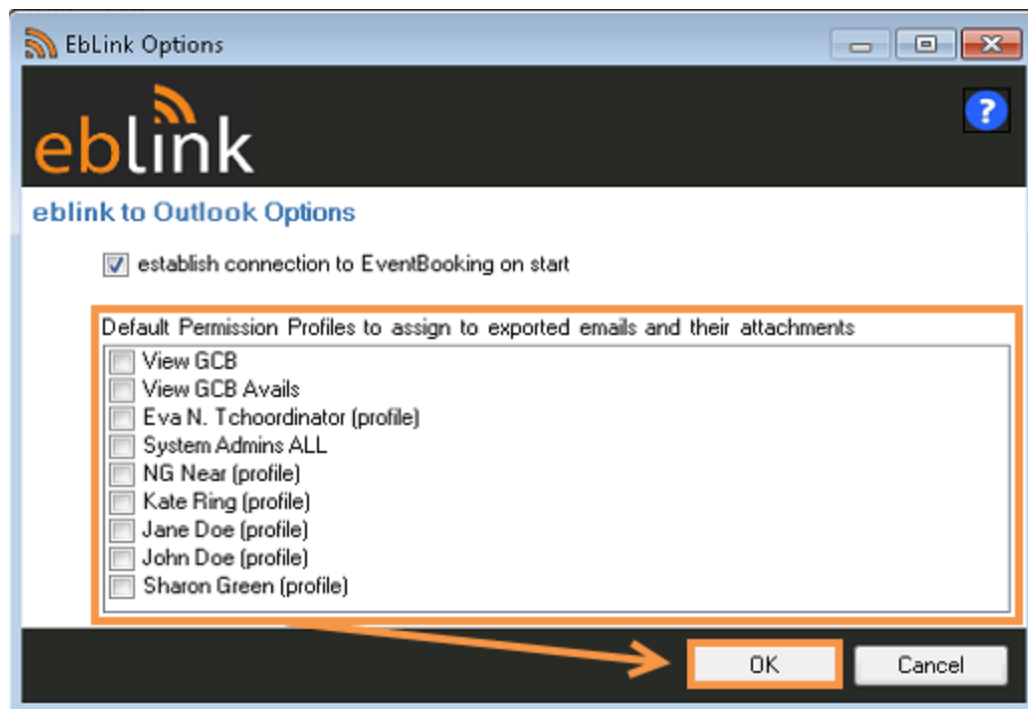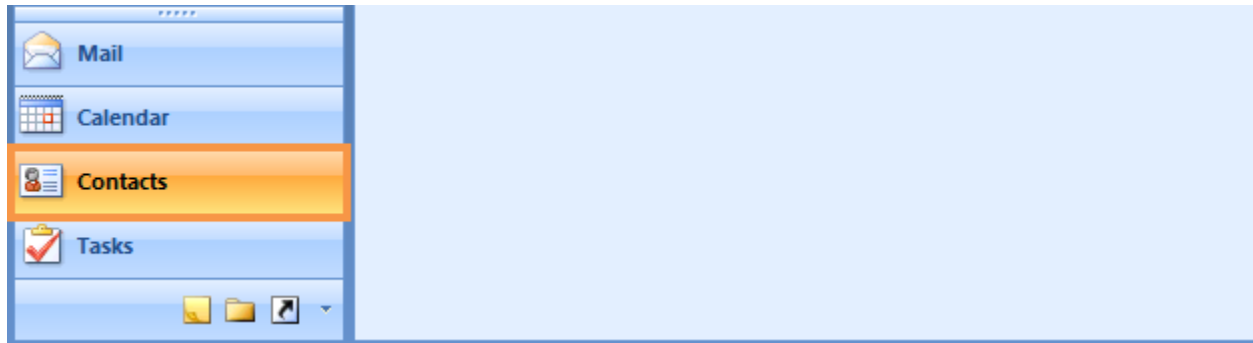
Copying Contacts to EventBooking

You can push contacts, companies, venues and artists from Outlook to your organization's EventBooking address book. To do so, please complete the following steps for the appropriate version of Outlook:
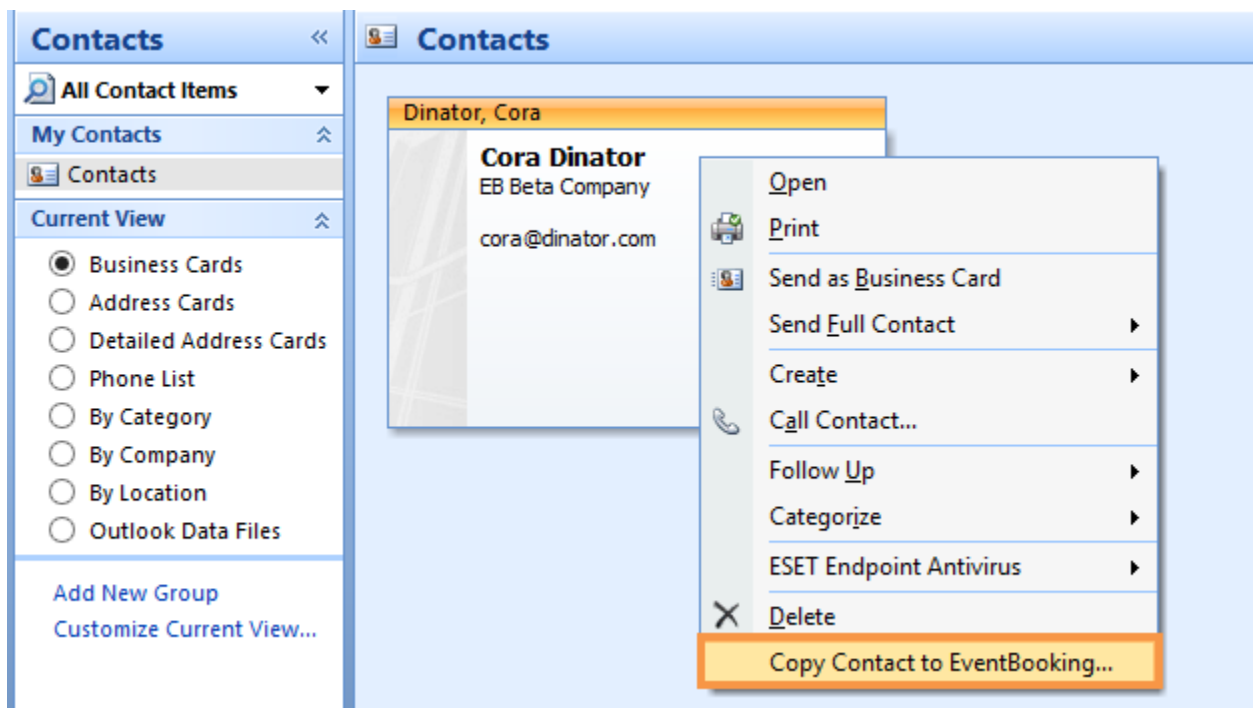
1. Outlook 2007
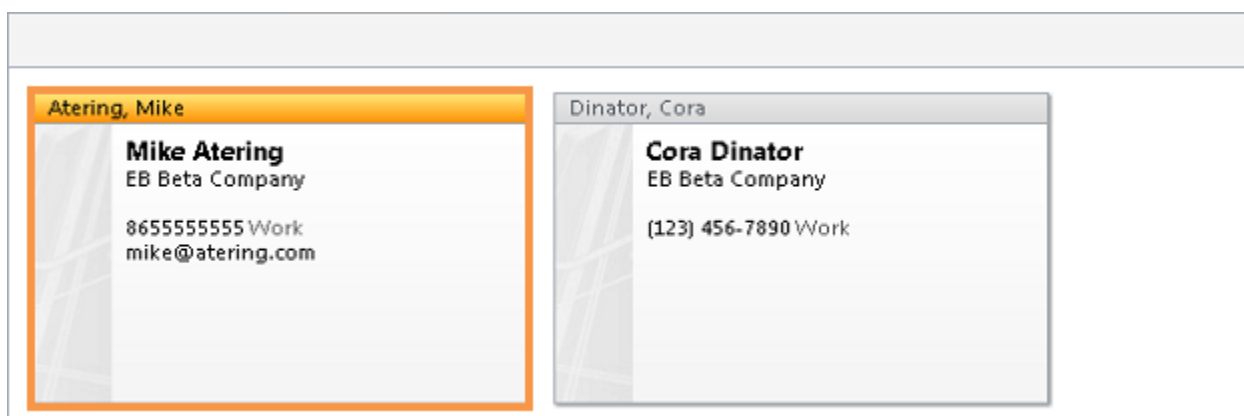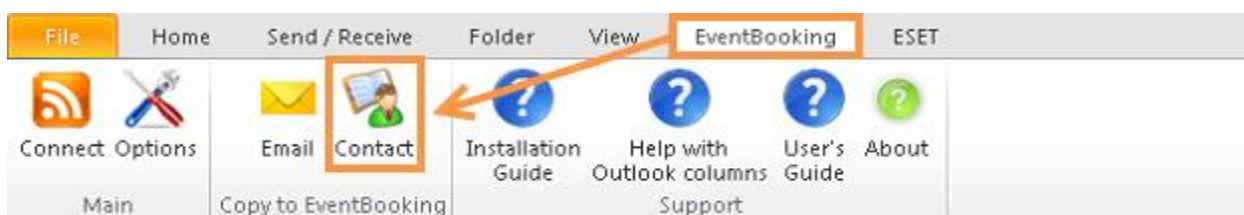2. Outlook 2010
3. Outlook 2013
4. Outlook 2016

Outlook 2007

1. Click **Contacts** in the bottom-left of the Outlook window.

2. Right-click the contact you would like to copy to EventBooking.

3. Click **Copy Contact to EventBooking**.

4. Select whether your contact is a Company, Person, Venue or Artist.

5. Update any other information you would like before copying.
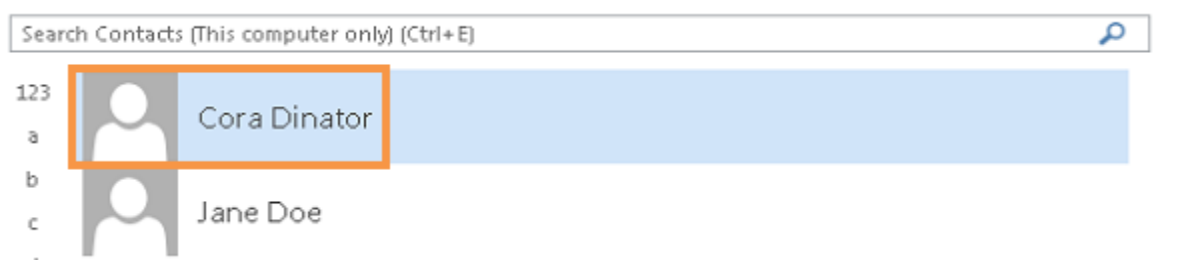
6. Click **OK**.

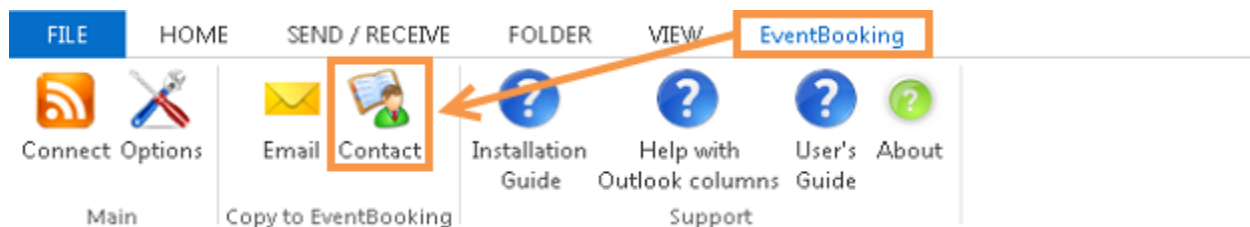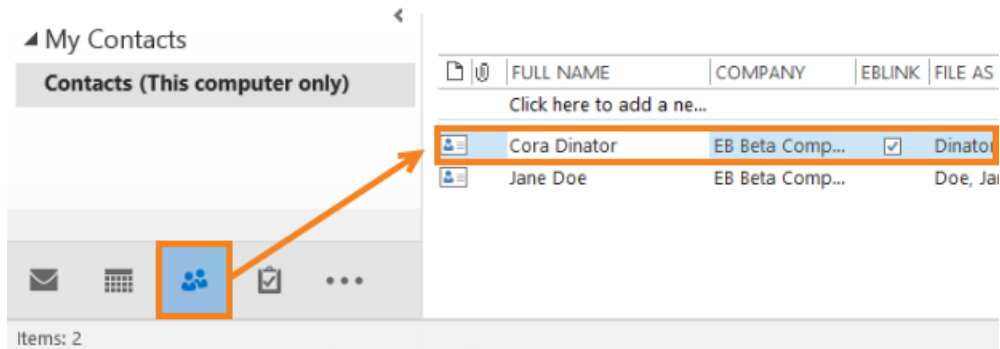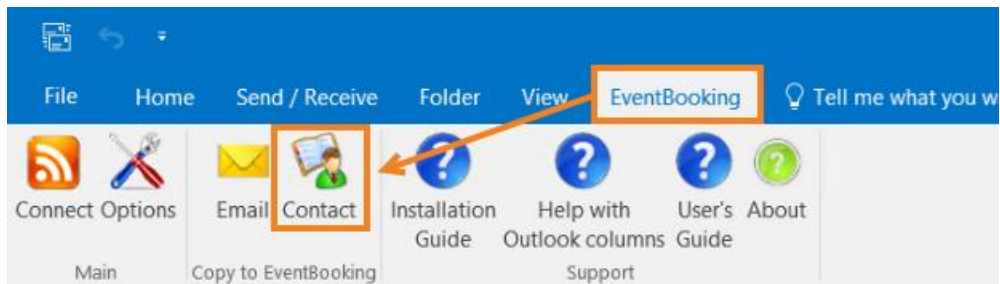
7. Click **OK**.

Outlook 2010

1. Click **Contacts** in the bottom-left of the Outlook window.

2. Select the contact you would like to copy to EventBooking.

3. Click the **EventBooking** tab on the menu ribbon.
4. Click **Contact**.

5. Select whether your contact is a Company, Person, Venue or Artist.

6. Update any other information you would like before uploading.

7. Click **OK.**

8. Click **OK.**

Outlook 2013

1. Click **People** in the bottom-left of the Outlook window.

Mail   Calendar   People   Tasks   ···

Done

2. Select the contact you would like to copy to EventBooking.

Search Contacts (This computer only) (Ctrl+E)

123   Cora Dinator

a

b   Jane Doe

c

3. Click the **EventBooking** tab on the menu ribbon.
4. Click **Contact**.

FILE   HOME   SEND / RECEIVE   FOLDER   VIEW   EventBooking

Connect Options   Email Contact   Installation   Help with   User's About
                                       Guide   Outlook columns Guide

Main   Copy to EventBooking   Support

5. Select whether your contact is a Company, Person, Venue or Artist.

6. Update any other information you would like before copying.

7. Click **OK**.

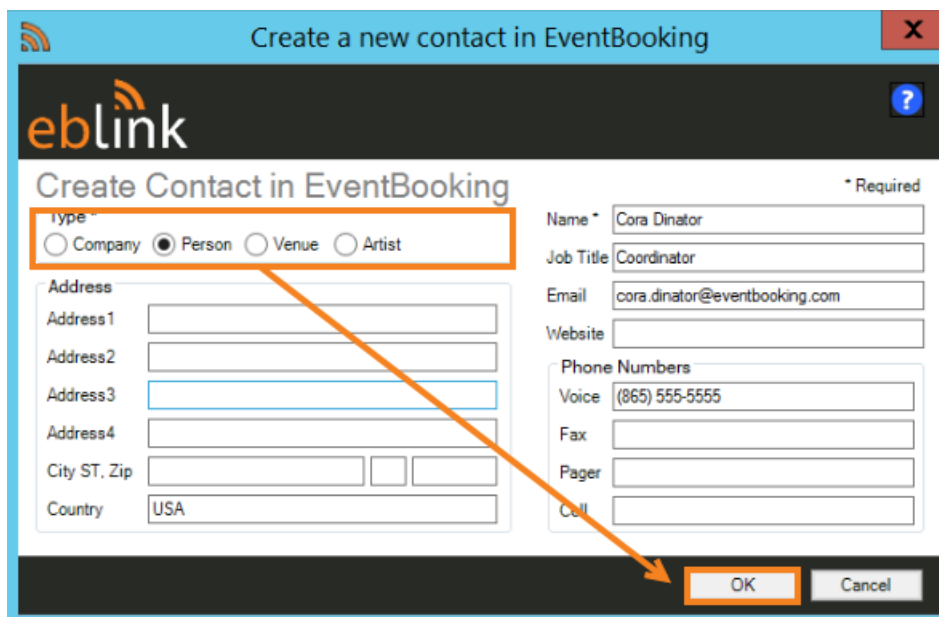8. Click **OK**.

Outlook 2016

1. Click the contacts icon in the bottom-left of the Outlook window.
2. Select the contact you would like to copy to EventBooking.

3. Click the **EventBooking** tab on the menu ribbon.
4. Click **Contact**.

5. Select whether your contact is a Company, Person, Venue or Artist.

6. Update any other information you would like before copying.

7. Click **OK**.

8. Click **OK**.

Copying Emails to EventBooking

You can copy your emails from Outlook to EventBooking. They can be copied to the Messages tab for address book items, events and sales opportunities. To do so, please complete the following steps for the appropriate version of Outlook:

1. Outlook 2007
2. Outlook 2010
3. Outlook 2013
4. Outlook 2016

Outlook 2007

1. Click **Mail** in the bottom-left of the Outlook window.

2. Right-click the email you would like to copy to EventBooking.

3. Click **Copy Email to EventBooking...**
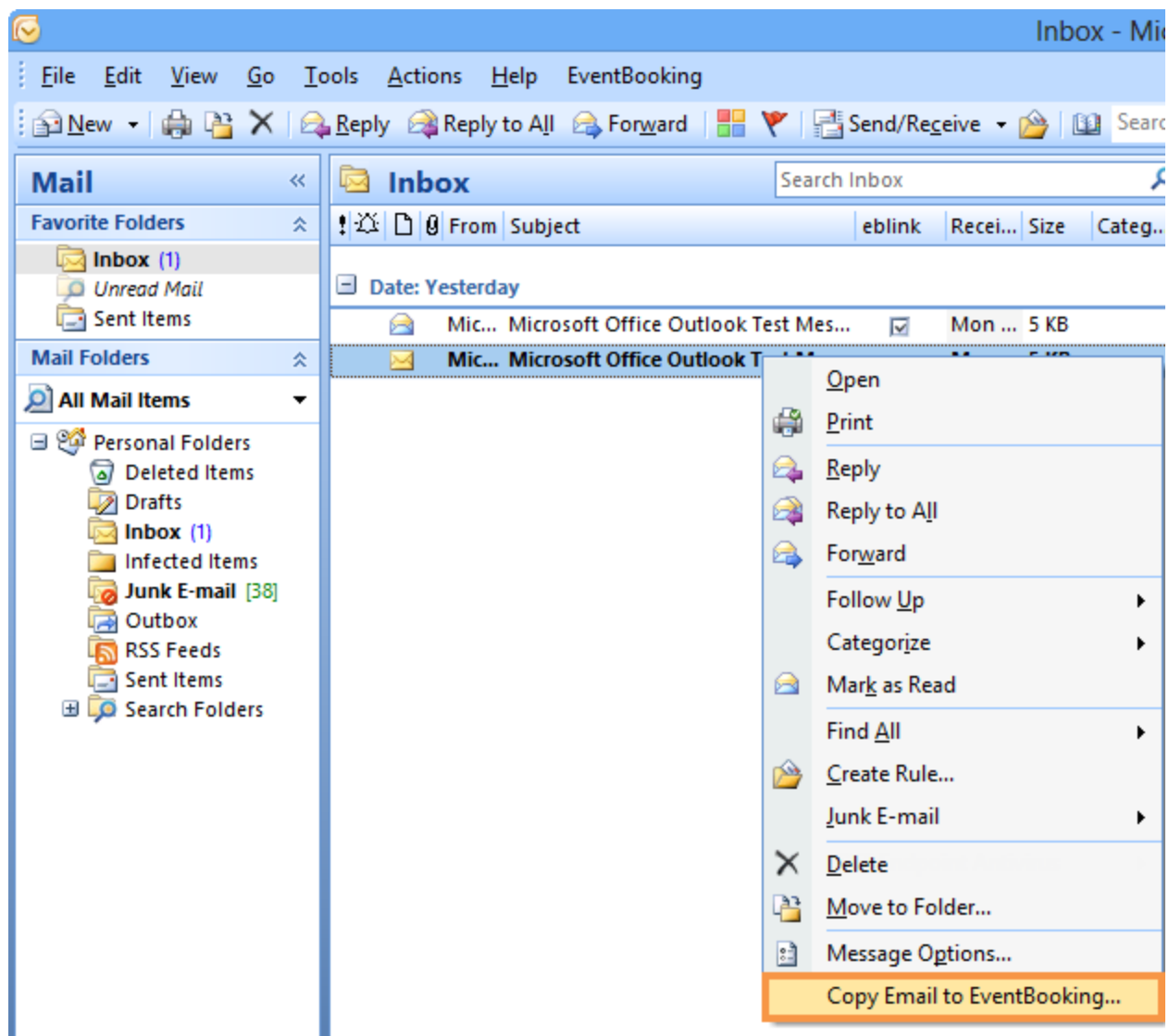
4. Type a search term to look for specific events, sales opportunities and address book items.

5. Click **Search**.
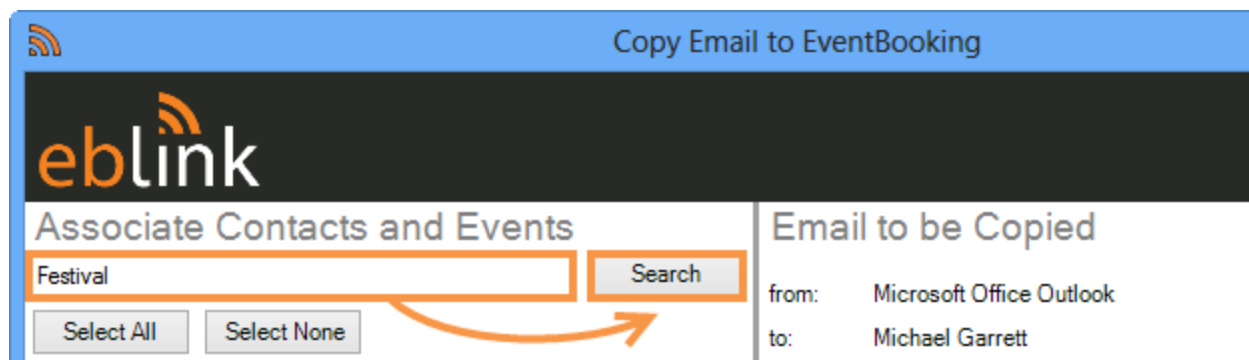
6. Select one of the search results.

7. Click **OK**.

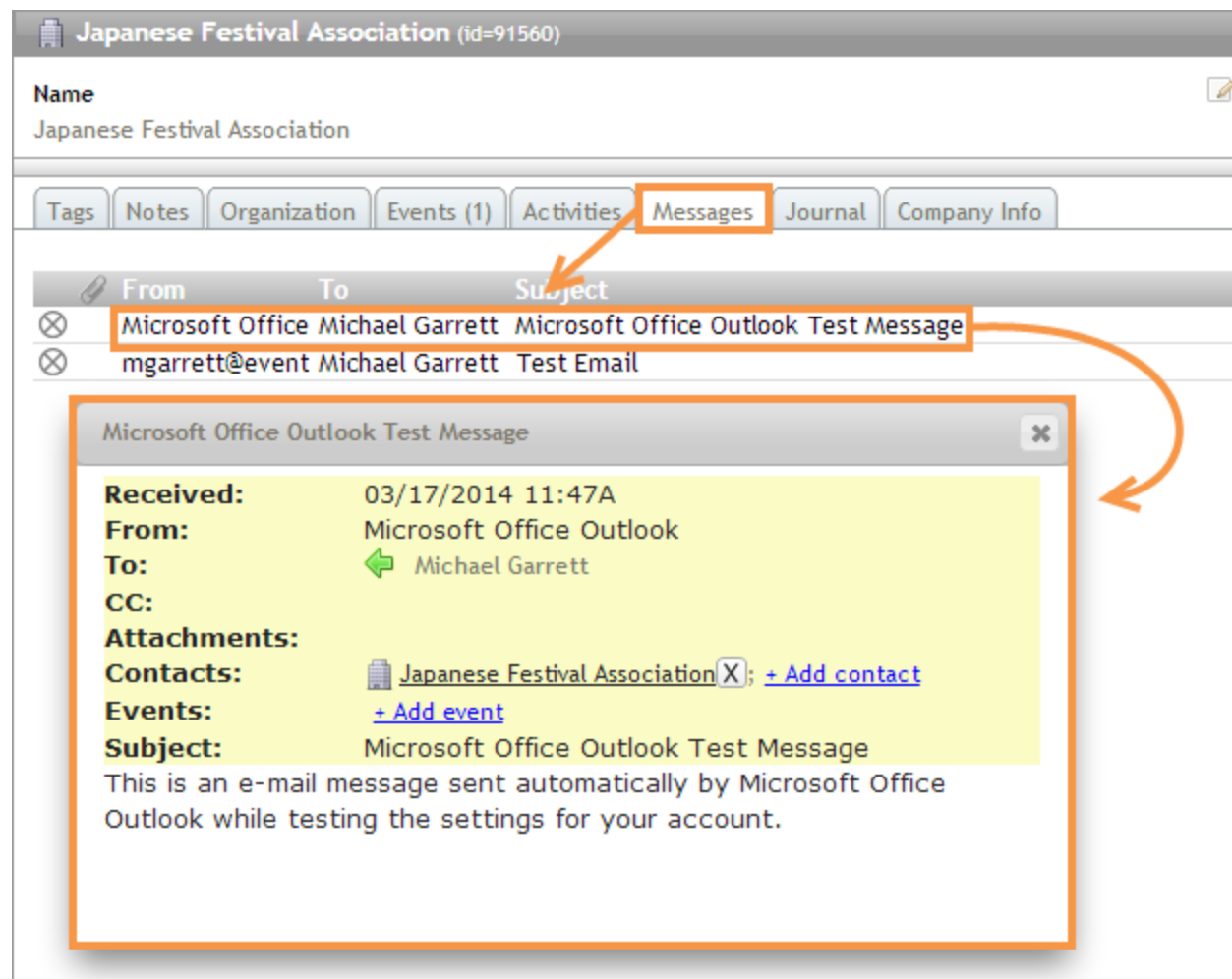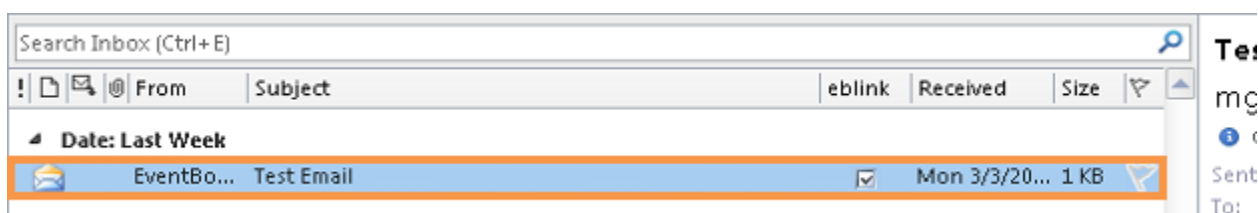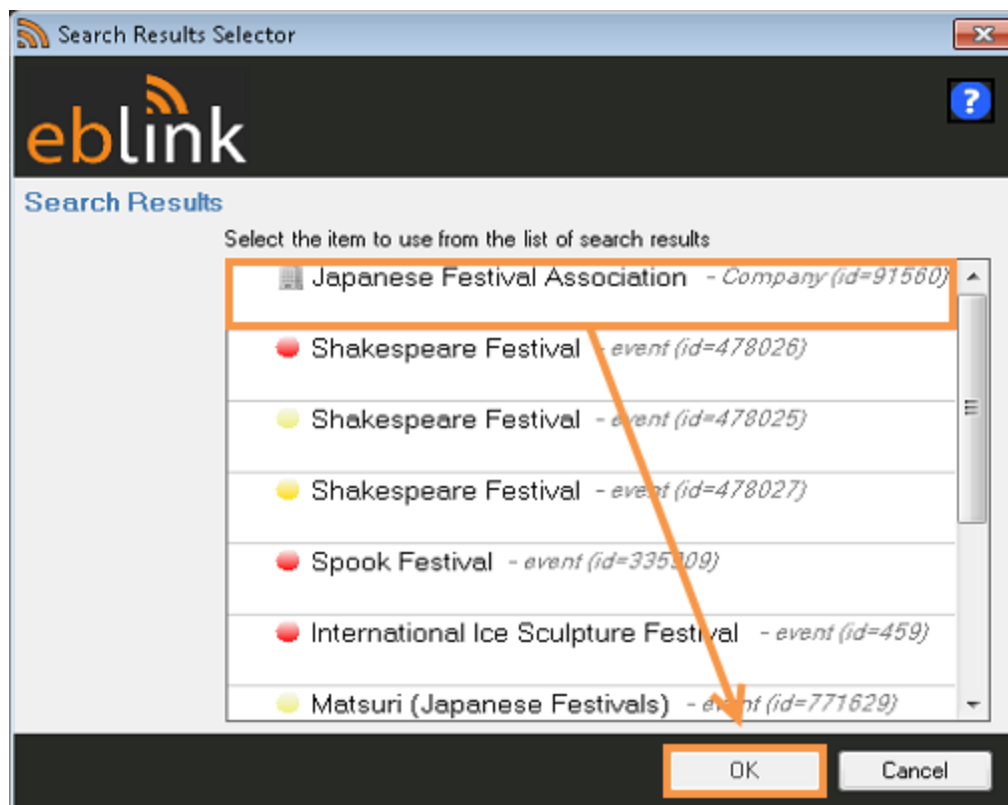(Repeat steps 4-7 for all events, sales opportunities and address book items to which you would like to copy the email.)
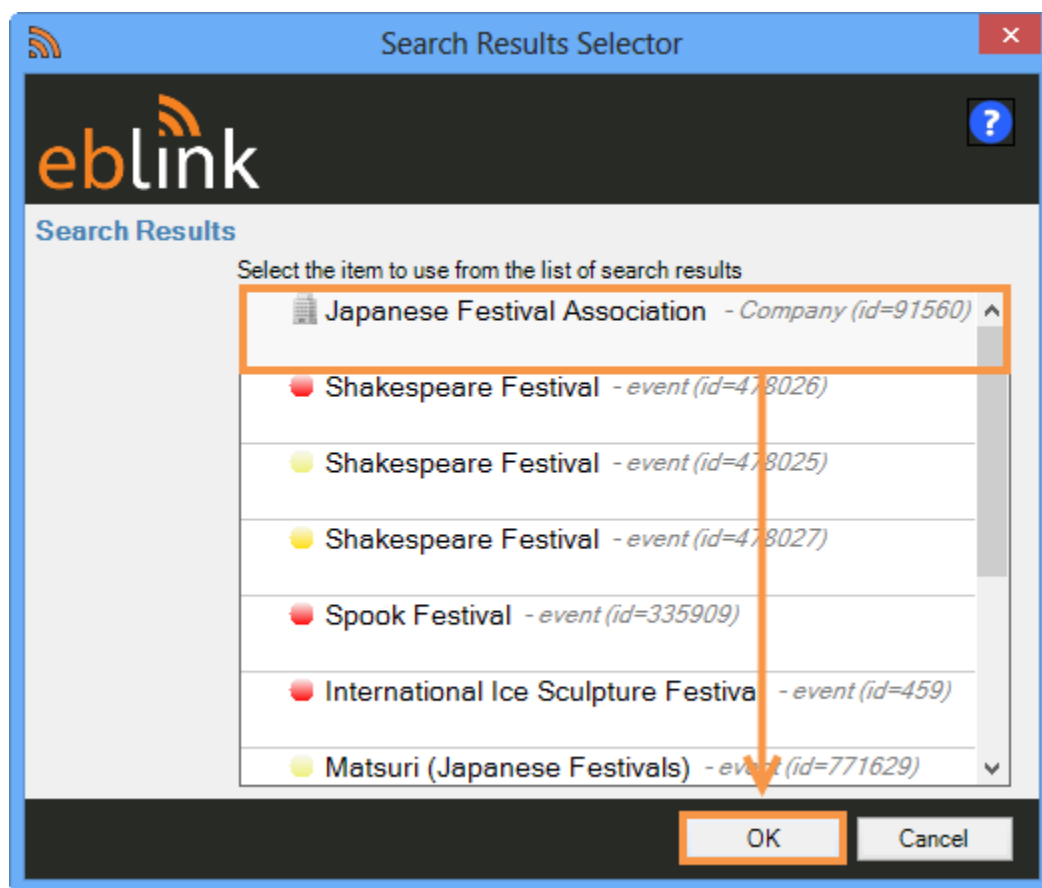
8. Make sure that all the events, sales opportunities and address book items to which you would like to copy the email are checked.

9. Check the Permission Profiles that should be able to see the copied email.

10. Check the attachments (if applicable) that you would like to copy with the email.

11. Click **Copy Email to EB**.
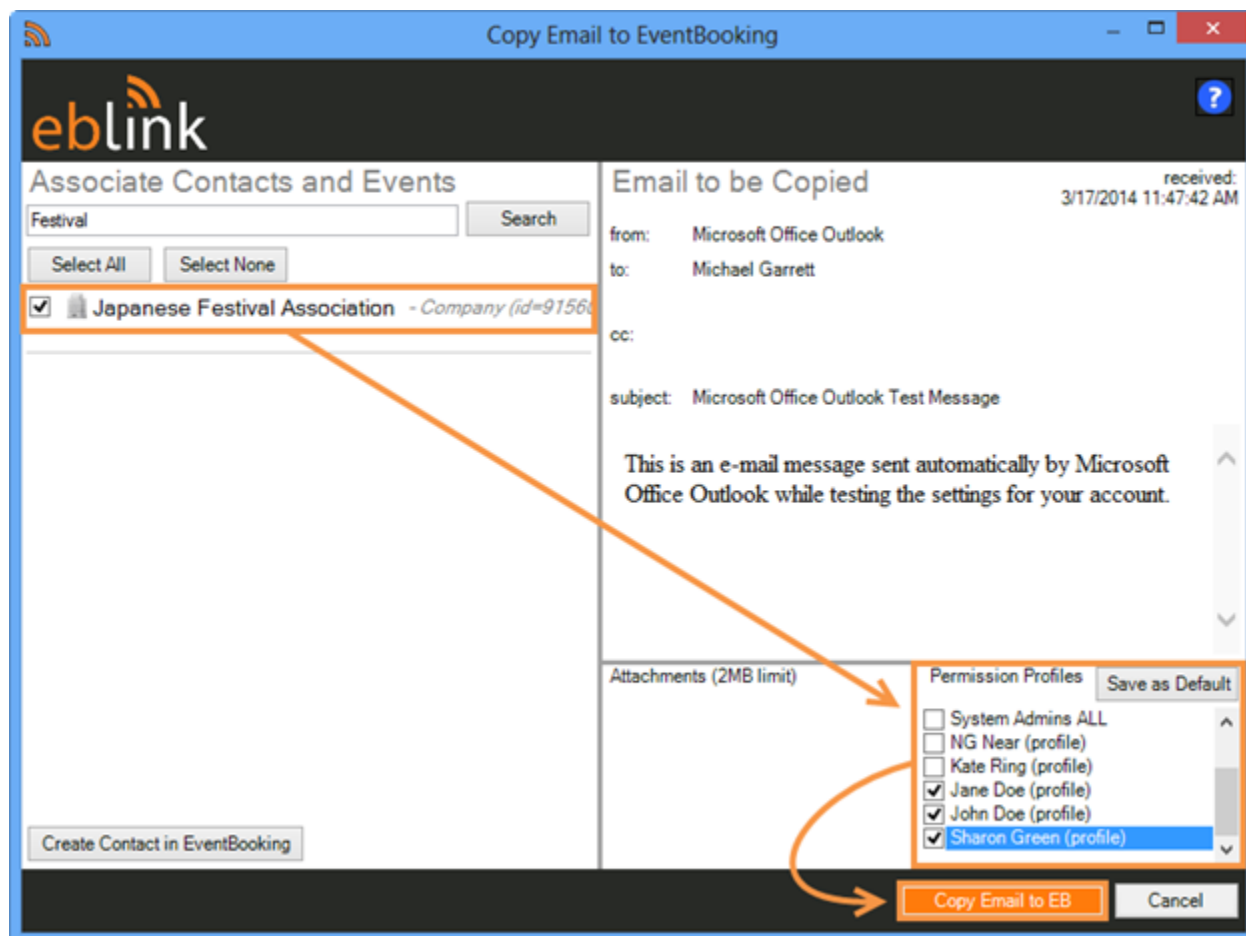
12. Click **OK**.
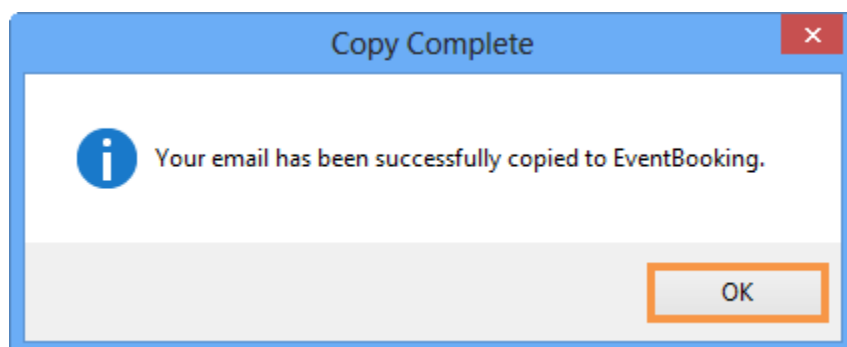
Your email has been attached to the contacts, events and sales opportunities selected.

Outlook 2010

1. Click **Mail** in the bottom-left of the Outlook window.
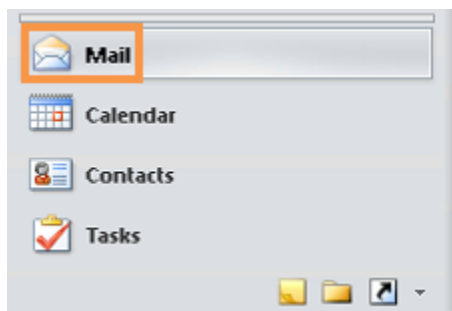
2. Select the email you would like to copy to EventBooking.

3. Click the **EventBooking** tab on the menu ribbon.
4. Click **Email**.

5. Type a search term to look for specific events, sales opportunities and address book items.
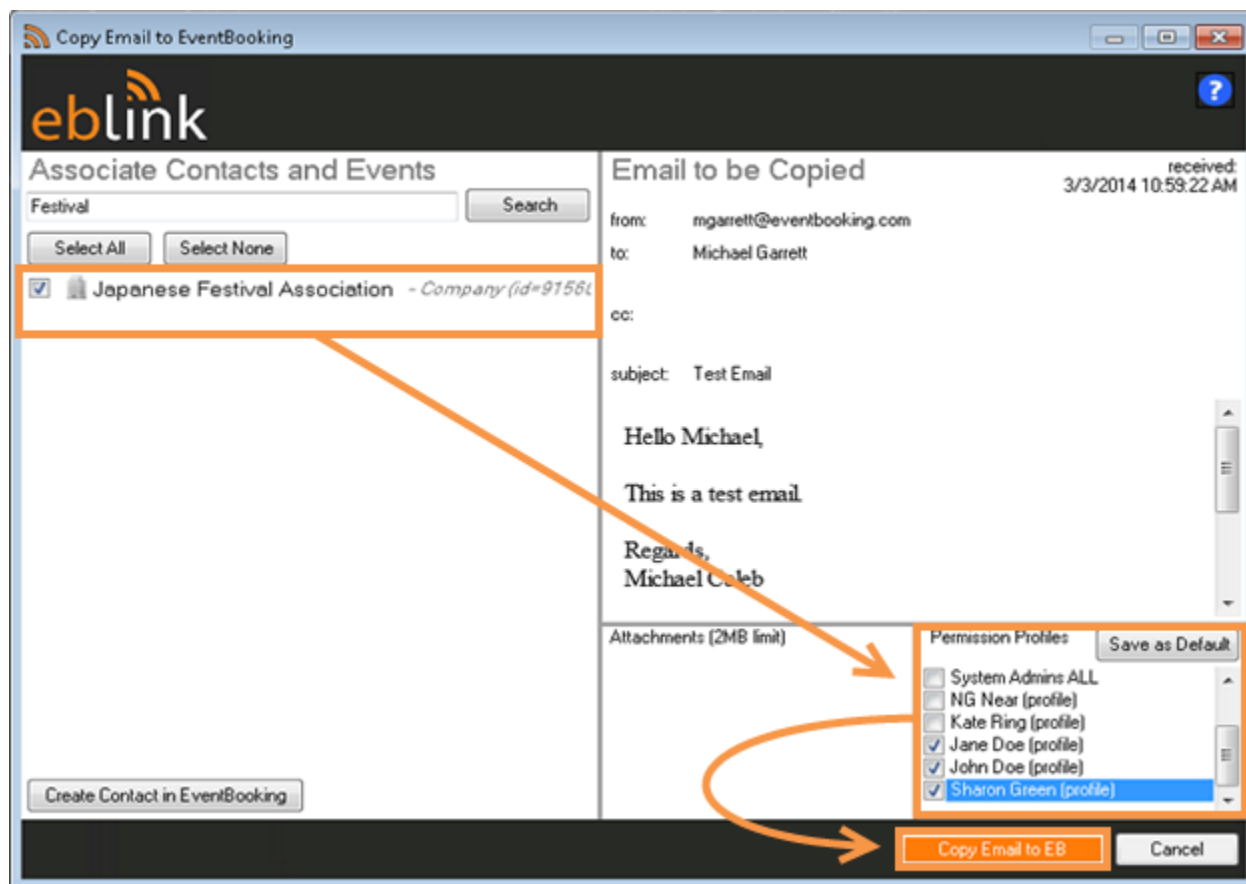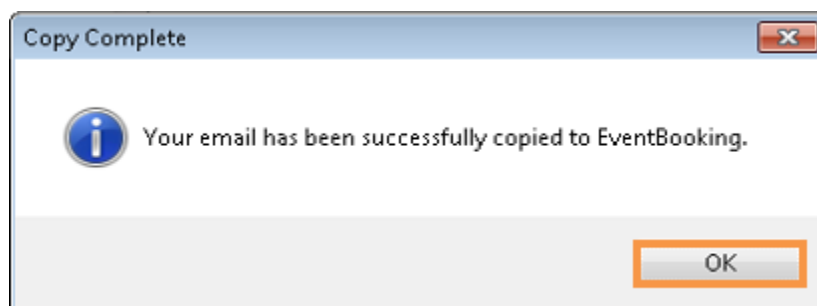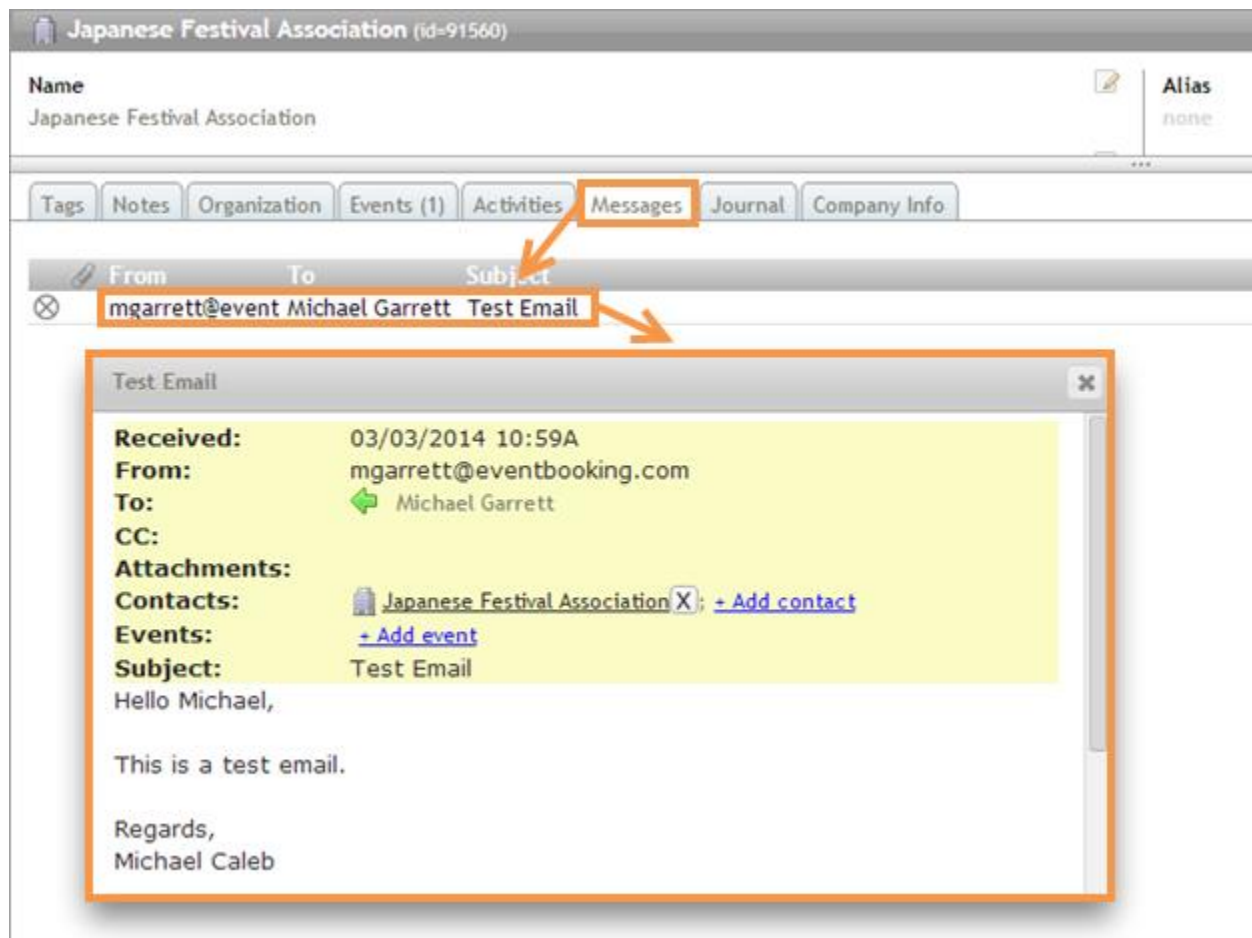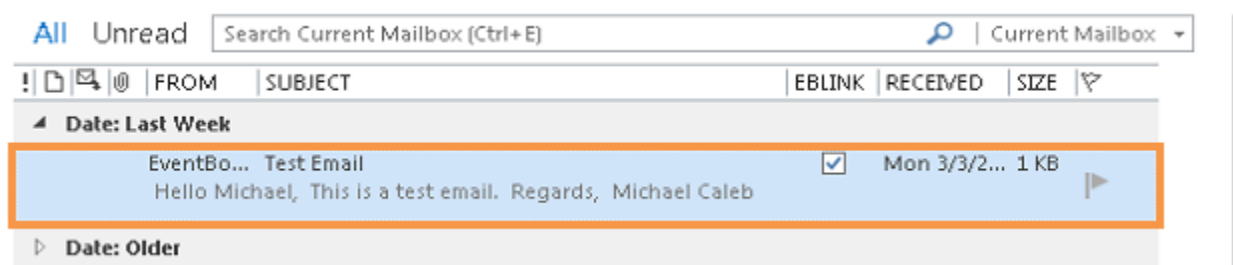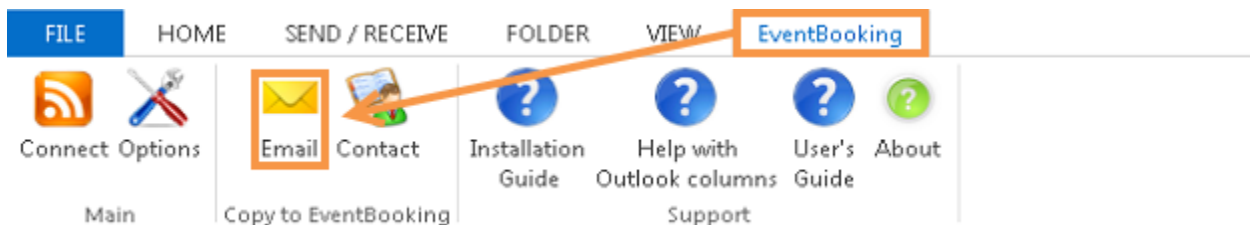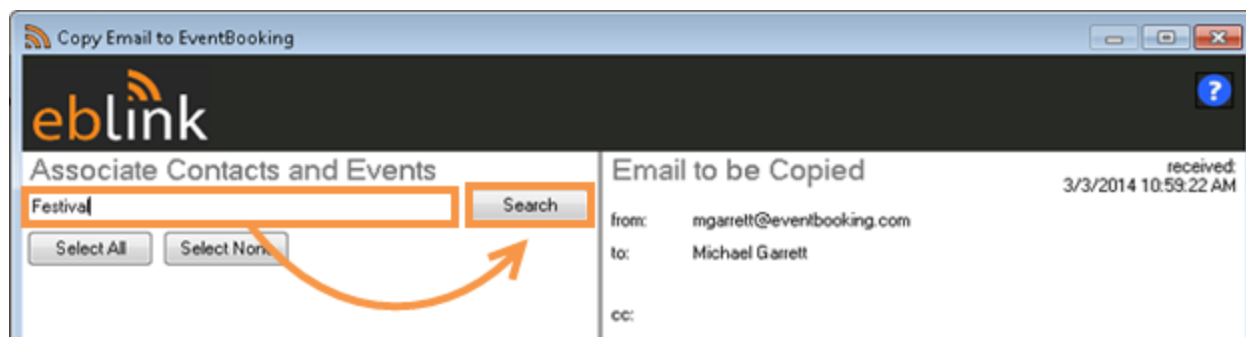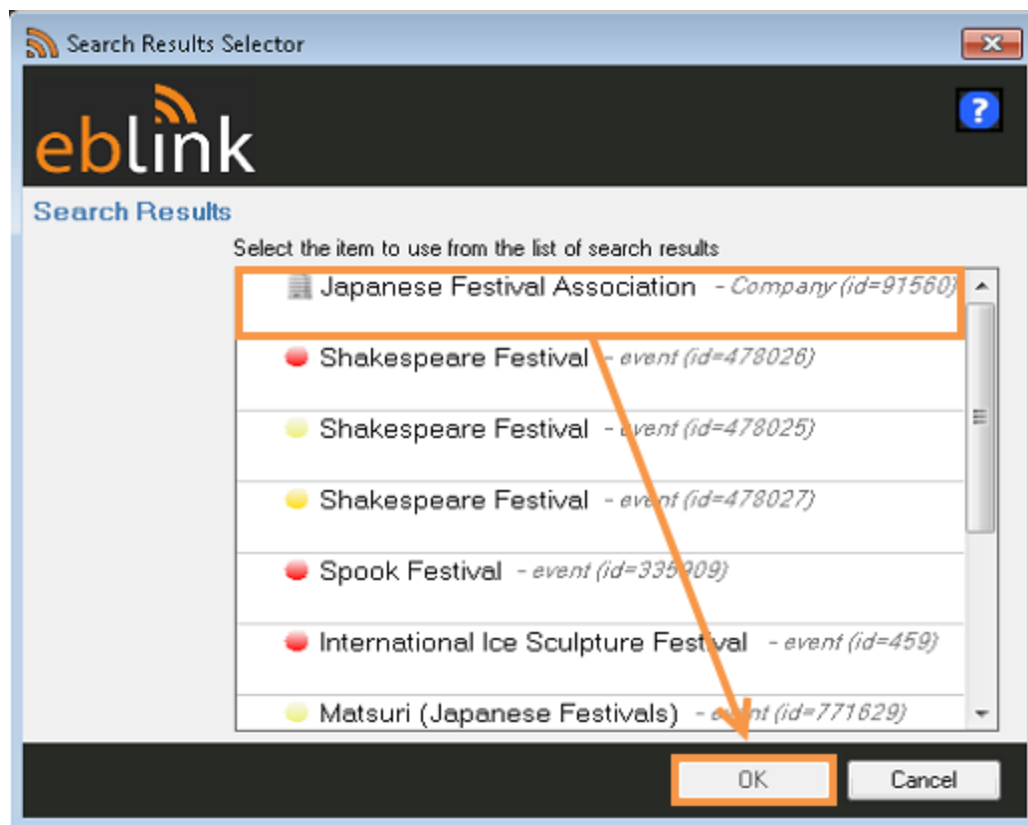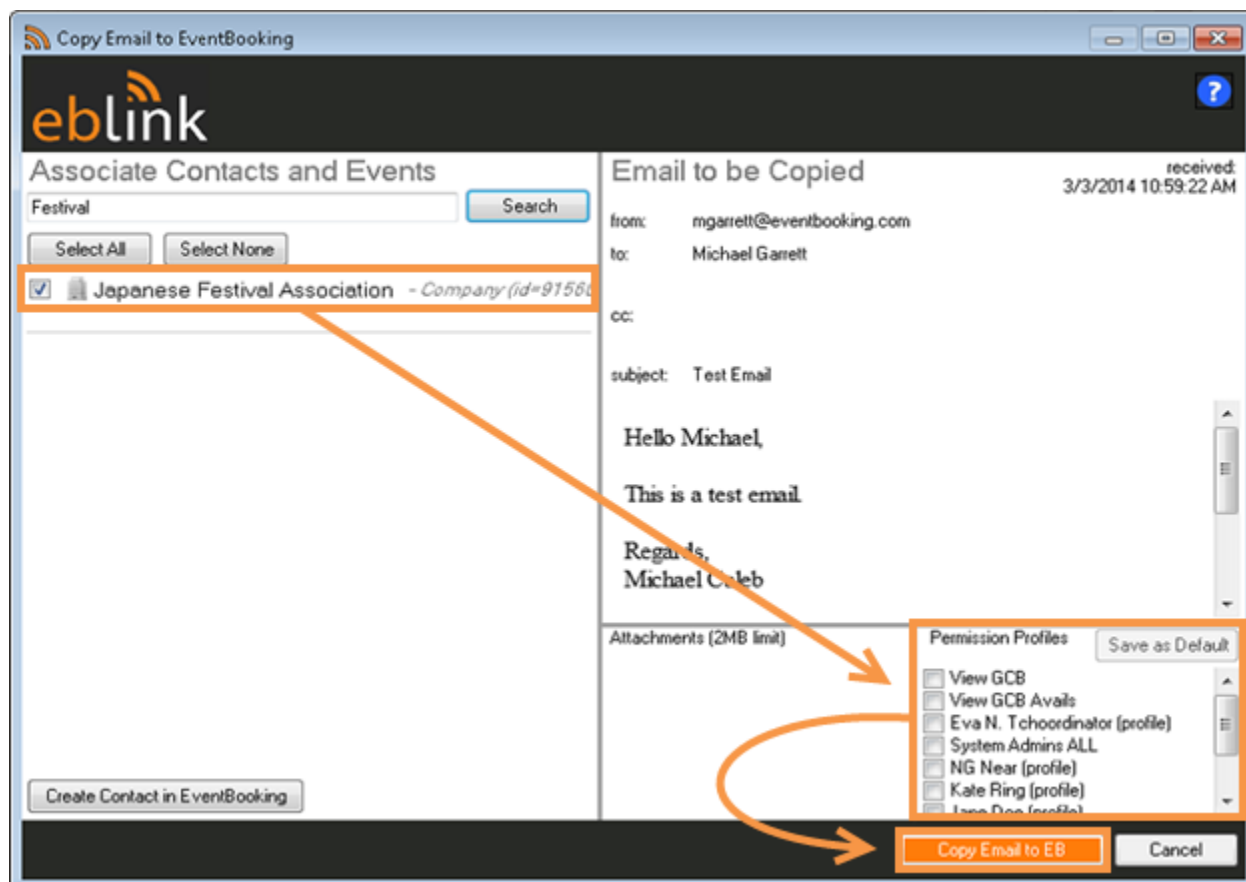
6. Click **Search**.
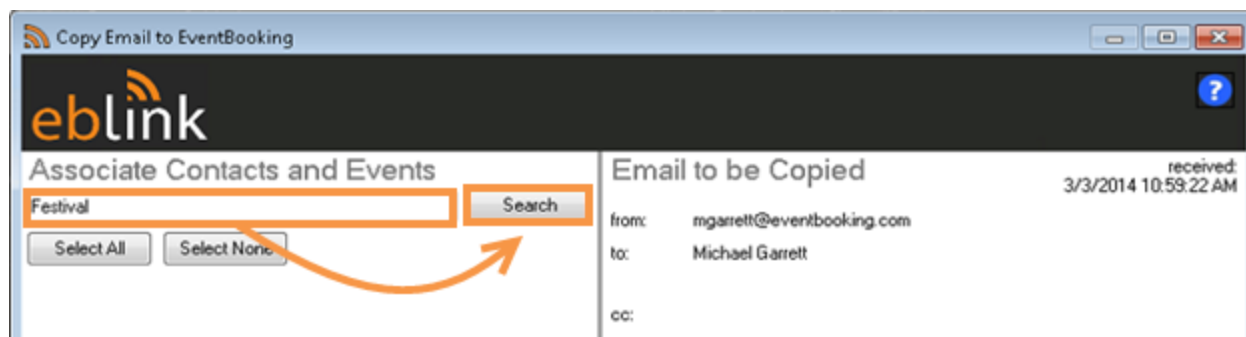
7. Select one of the search results.
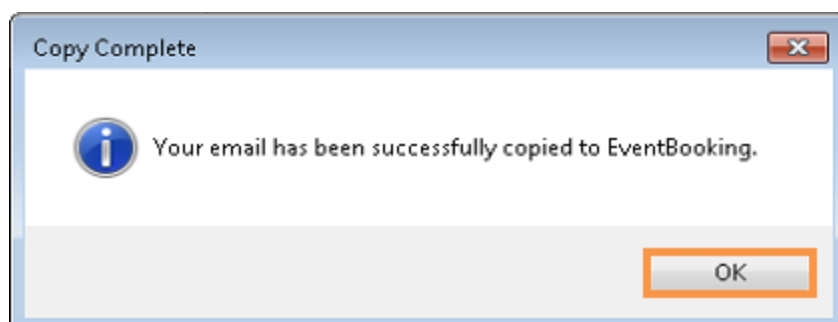
8. Click **OK**.

(Repeat steps 5-8 for all events, sales opportunities and address book items to which you would like to copy the email.)
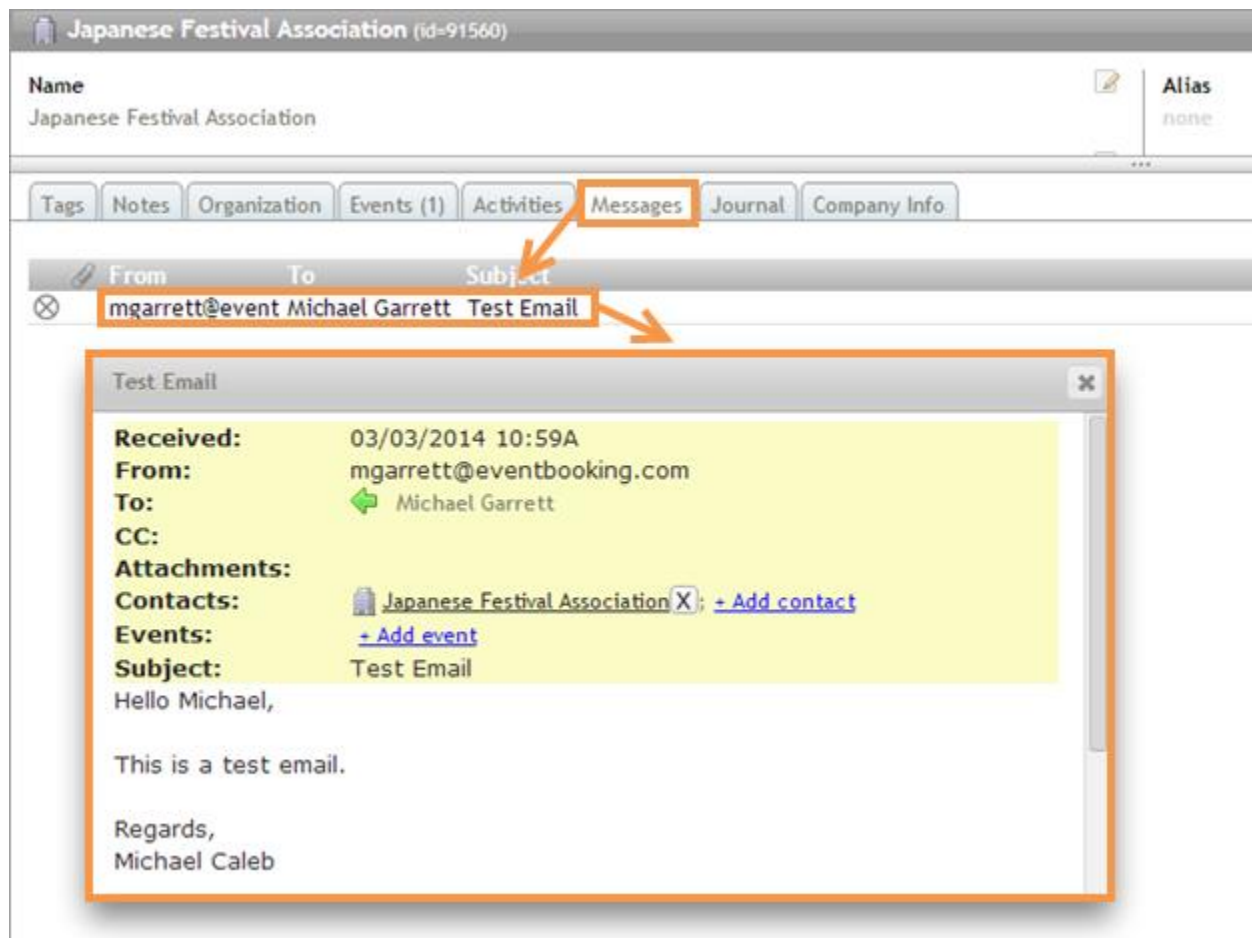
9. Make sure that all the events, sales opportunities and address book items to which you would like to copy the email are checked.

10. Check the Permission Profiles that should be able to see the copied email.

11. Check the attachments (if applicable) that you would like to copy with the email.

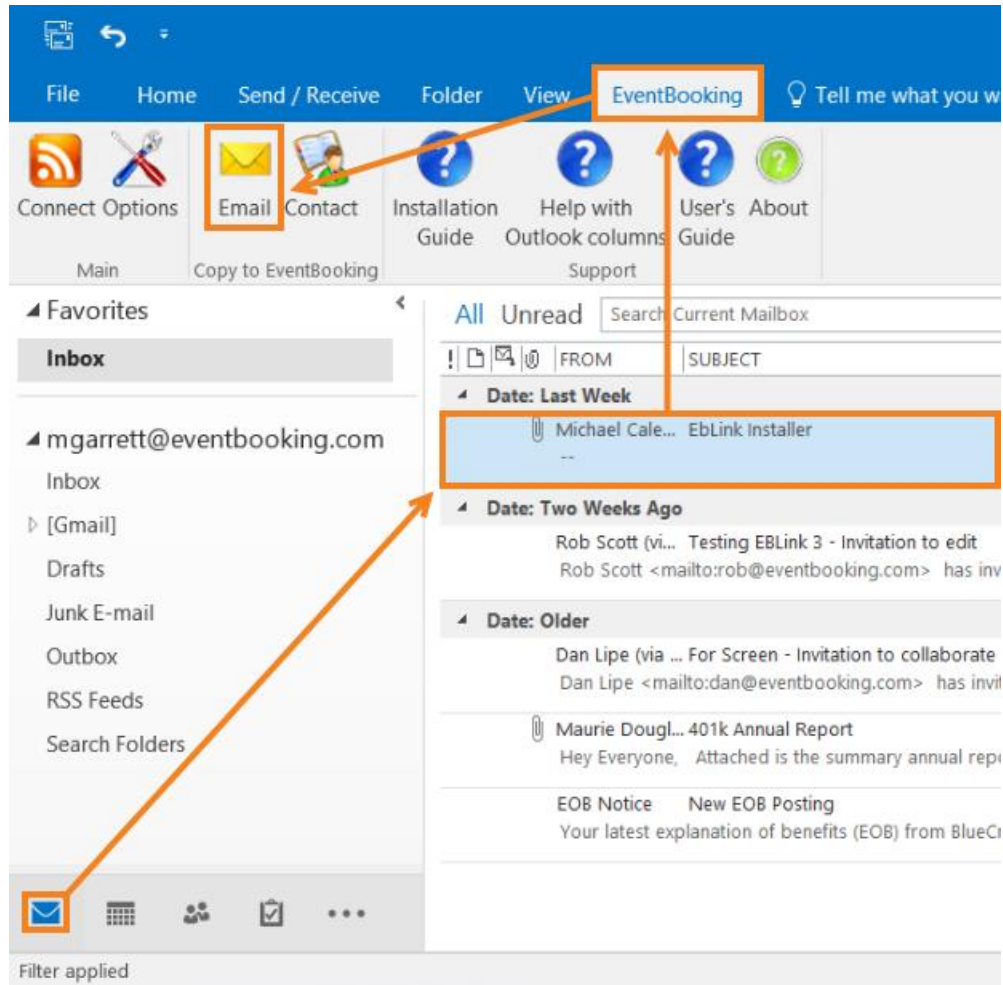12. Click **Copy Email to EB**.

13. Click **OK**.

Your email has been attached to the contacts, events and sales opportunities selected.
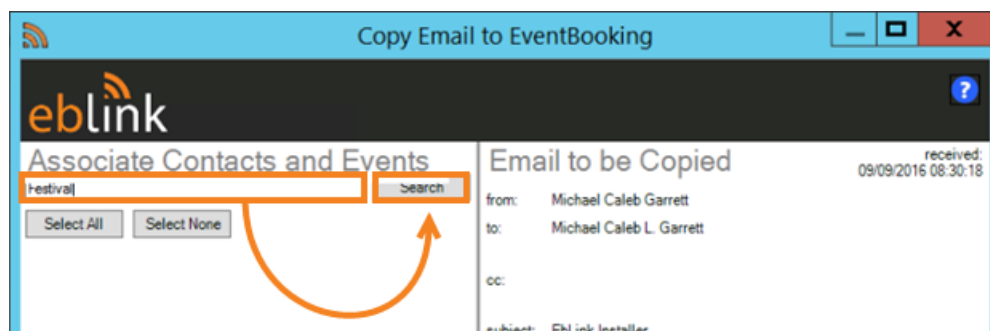
Outlook 2013

1. Click **Mail** in the bottom-left of the Outlook window.

2. Select the email you would like to copy to EventBooking.

3. Click the **EventBooking** tab on the menu ribbon.
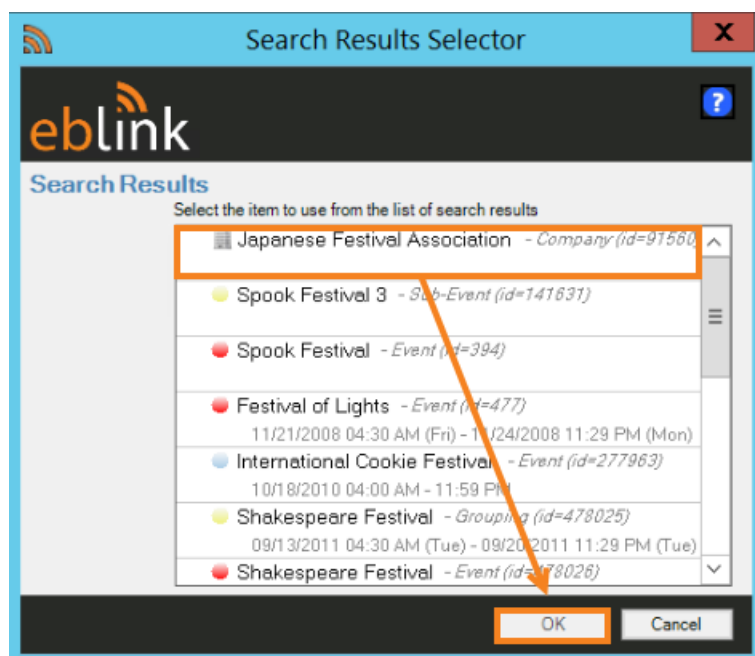4. Click **Email**.

5. Type a search term to look for specific events, sales opportunities and address book items.
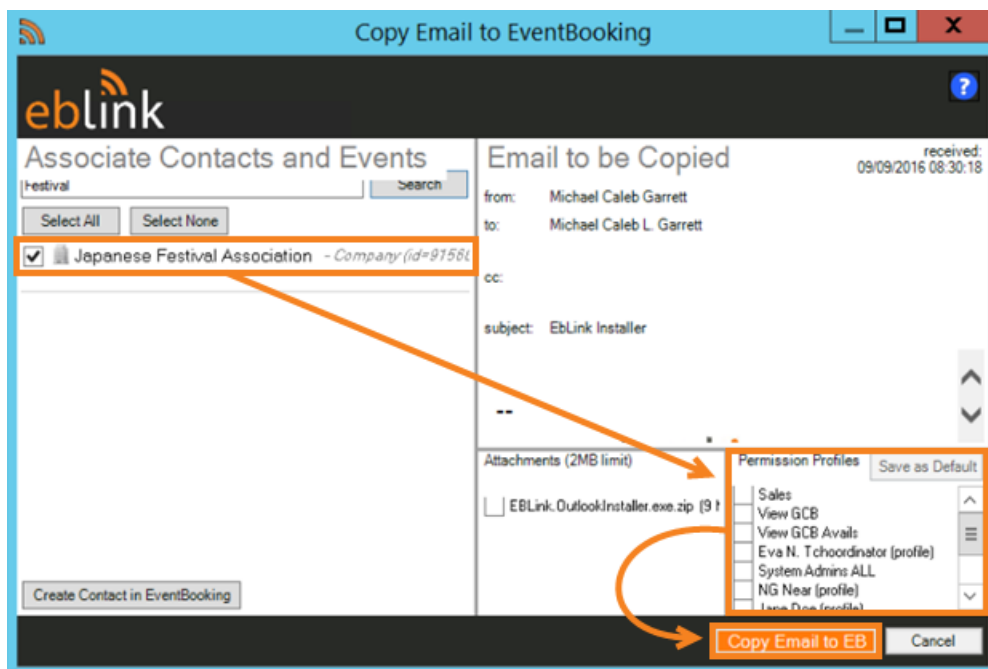
6. Click **Search**.

7. Select one of the results from the search results list.
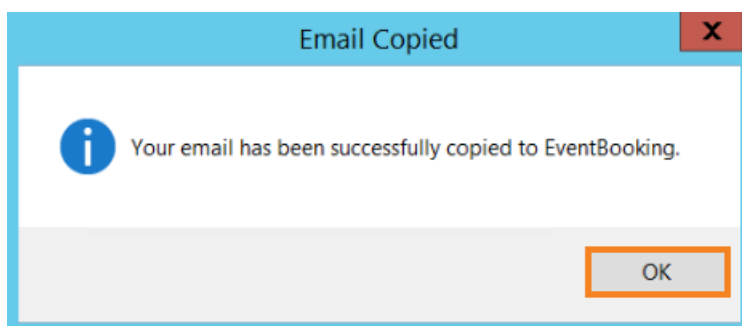
8. Click **OK**.

(Repeat steps 5-8 for all events, sales opportunities and address book items to which you would like to copy the email.)
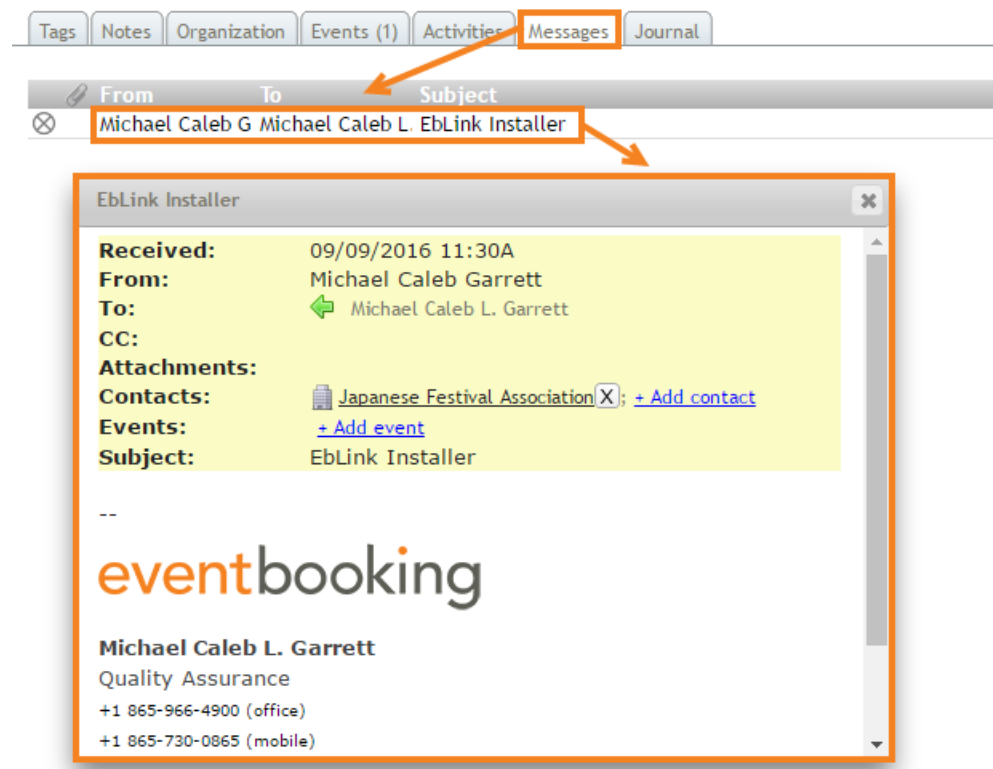
9. Make sure that all the events, sales opportunities and address book items to which you would like to copy the email are checked.

10. Check the Permission Profiles that should be able to see the copied email.

11. Check the attachments (if applicable) that you would like to copy with the email.

12. Click **Copy Email to EB**.

13. Click **OK**.

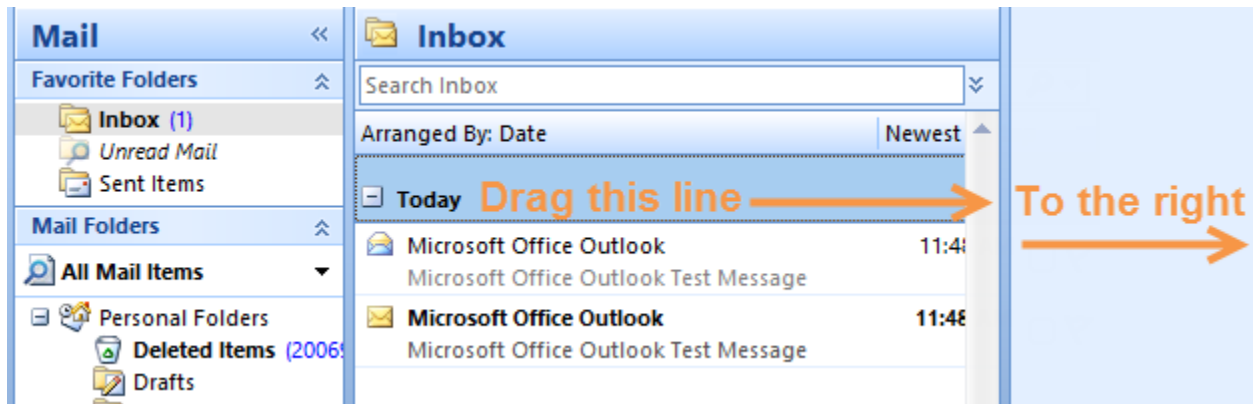Your email has been attached to the contacts, events or sales opportunities selected.

Outlook 2016

1. Click the mail icon in the bottom-left of the Outlook window.

2. Select the email you would like to copy to EventBooking.

3. Click the **EventBooking** tab on the menu ribbon.

4. Click **Email**.

5. Type a search term to look for specific events, sales opportunities and address book items.

6. Click **Search**.

7. Select one of the results from the search results list.

8. Click **OK**.

(Repeat steps 5-8 for all events, sales opportunities and address book items to which you would like to copy the email.)

9. Make sure that all the events, sales opportunities and address book items to which you would like to copy the email are checked.

10. Check the Permission Profiles that should be able to see the copied email.

11. Check the attachments (if applicable) that you would like to copy with the email.

12. Click **Copy Email to EB**.

13. Click **OK**.

Your email has been attached to the contacts, events or sales opportunities selected.

Adding an EbLink Column to Your Email

You can add a column to your Outlook email messages with small icons that will tell you whether you have already sent a message to EventBooking with EbLink.

Configure for:

1. Outlook 2007
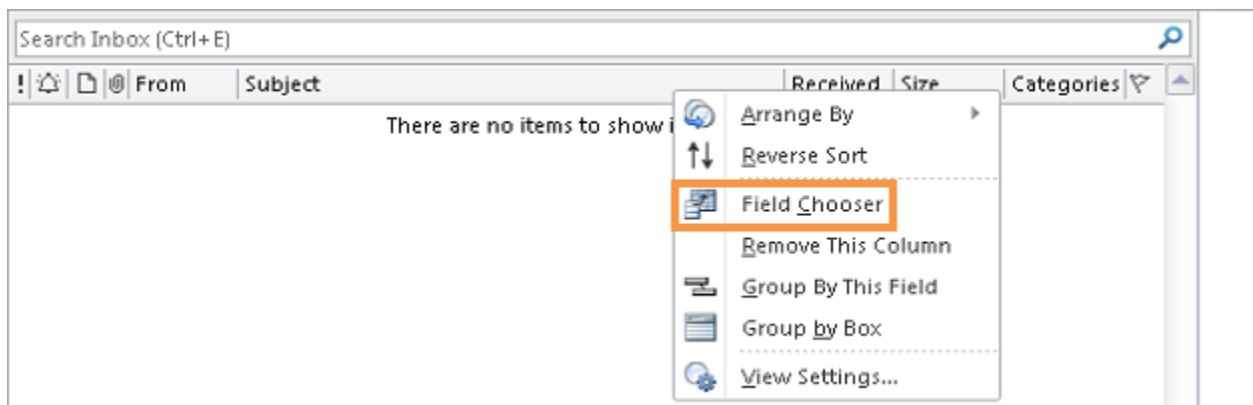2. Outlook 2010
3. Outlook 2013
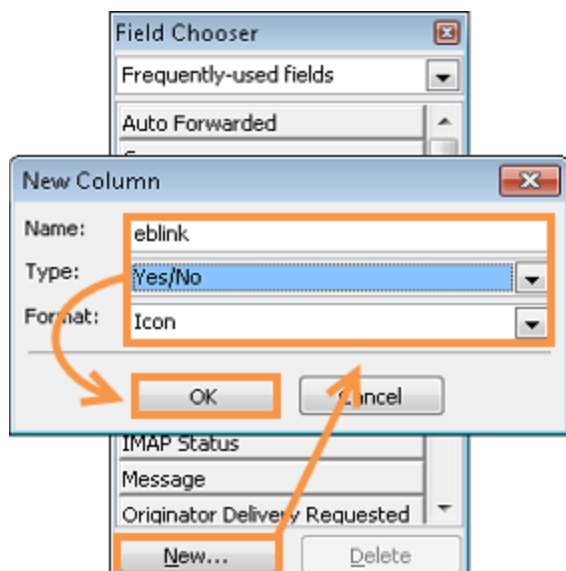4. Outlook 2016

Outlook 2007

1. Navigate to your inbox.

2. Drag the preview frame to the right until you can see all the column headers.

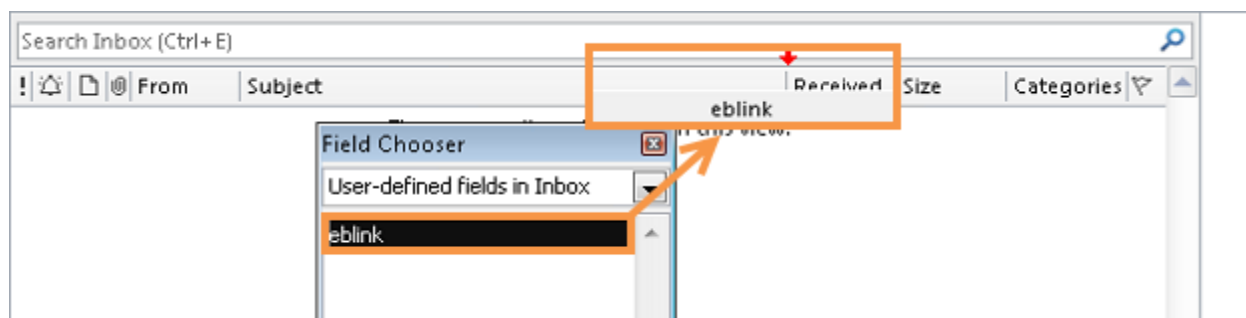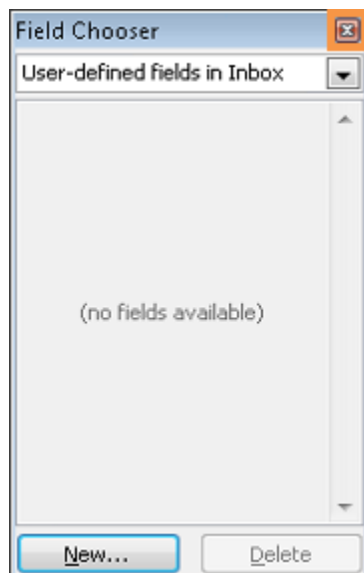3. Right-click the column headers bar.

4. Click **Field Chooser**.
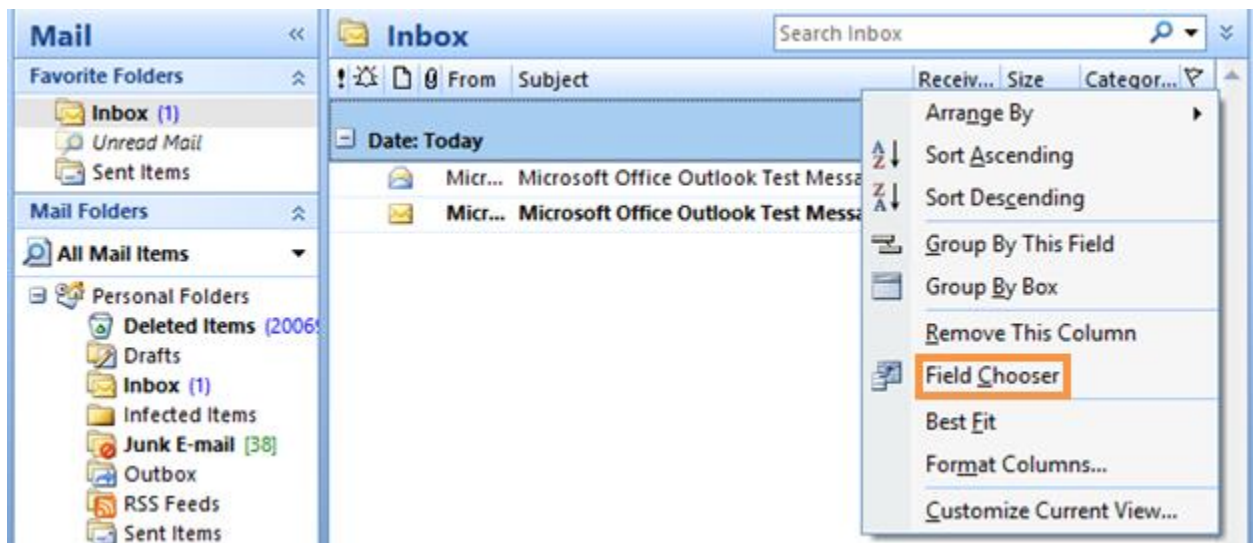
5. Click **New…**

6. Configure the new field like the image below. (i.e. Name: eblink, Type: Yes/No, Format: Icon)
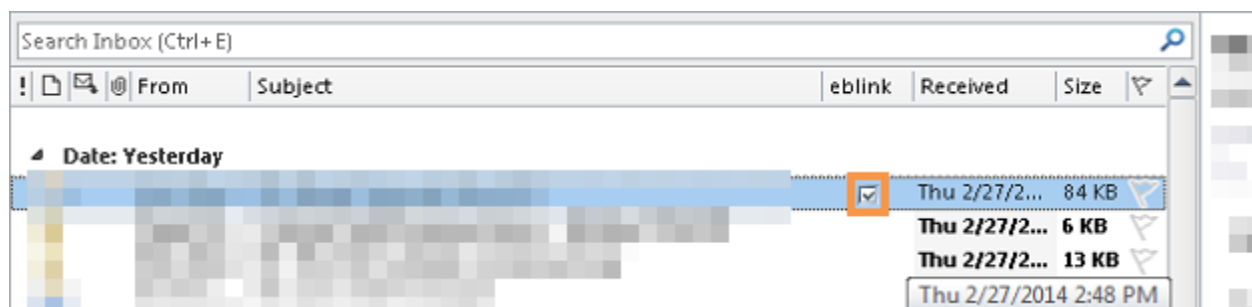
7. Click **OK**.
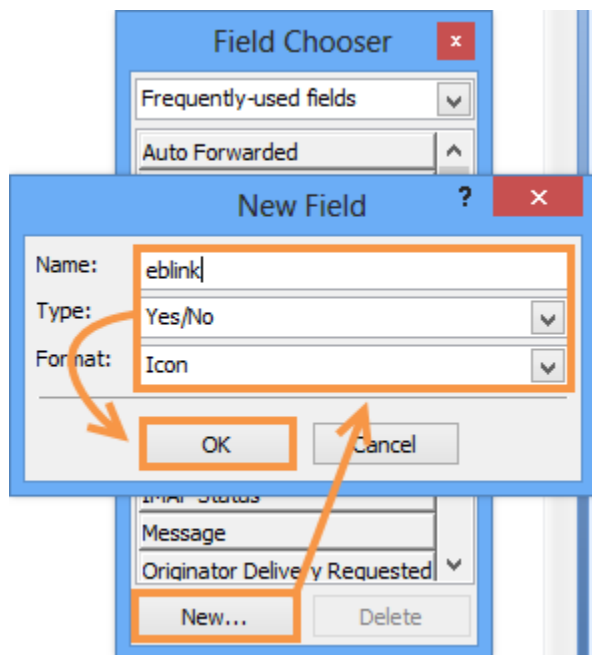
8. Drag and drop the black EbLink box up into the header columns bar.
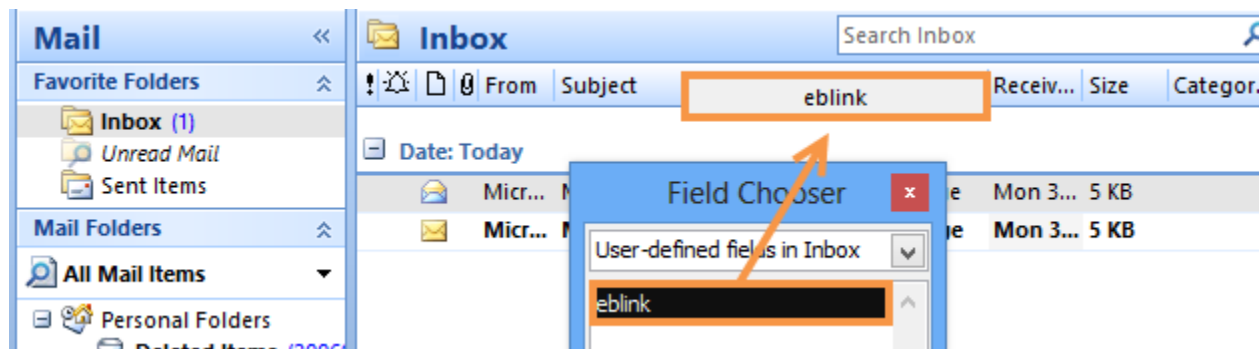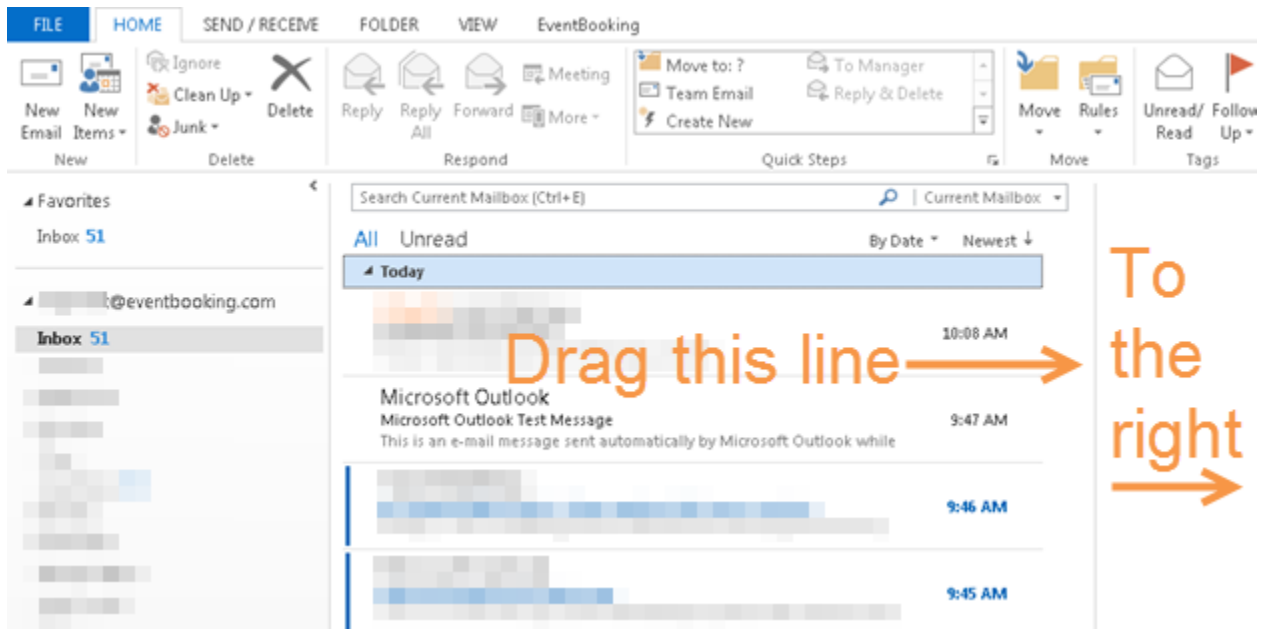
9. Click **X** to close the field chooser.
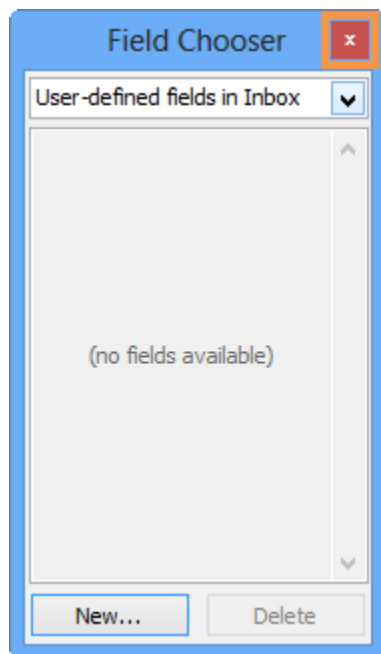
10. You now have EbLink as a column in your email. You will see a checkbox icon in the EbLink column after you upload a message to EventBooking via EbLink.
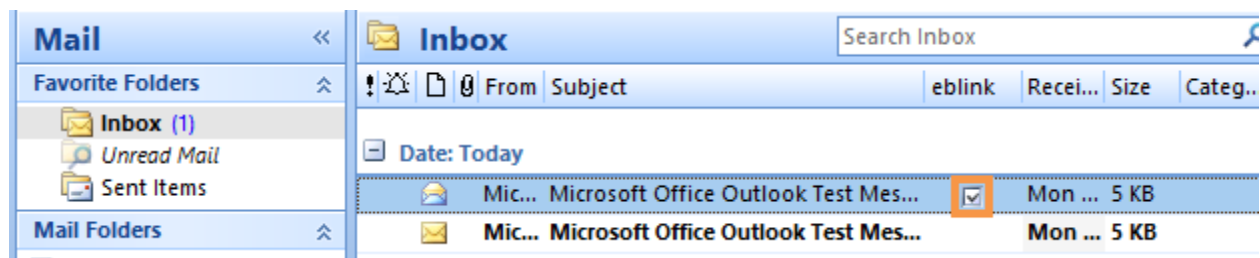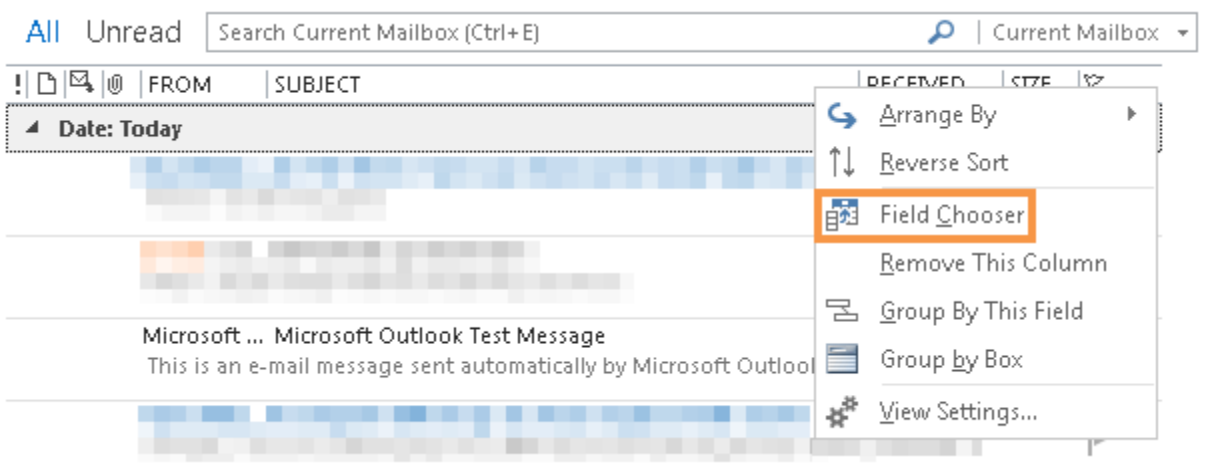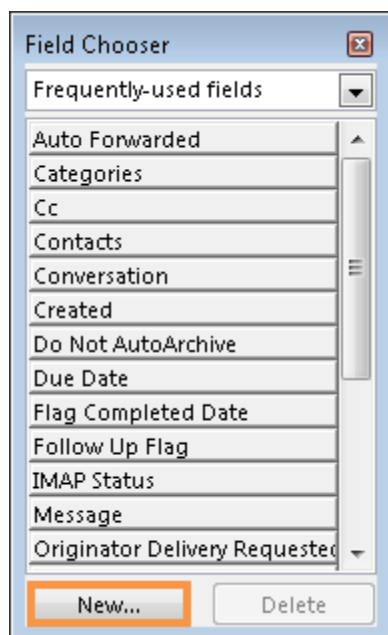
Outlook 2010

1. Navigate to your inbox.
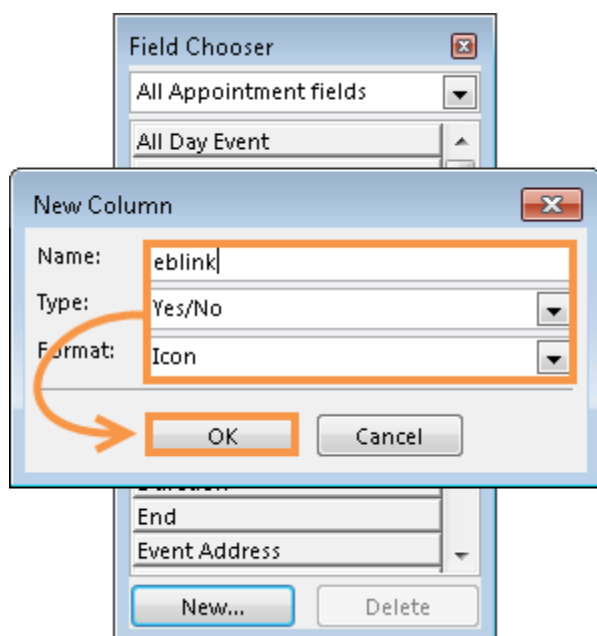2. Drag the preview frame to the right until you can see all the column headers.

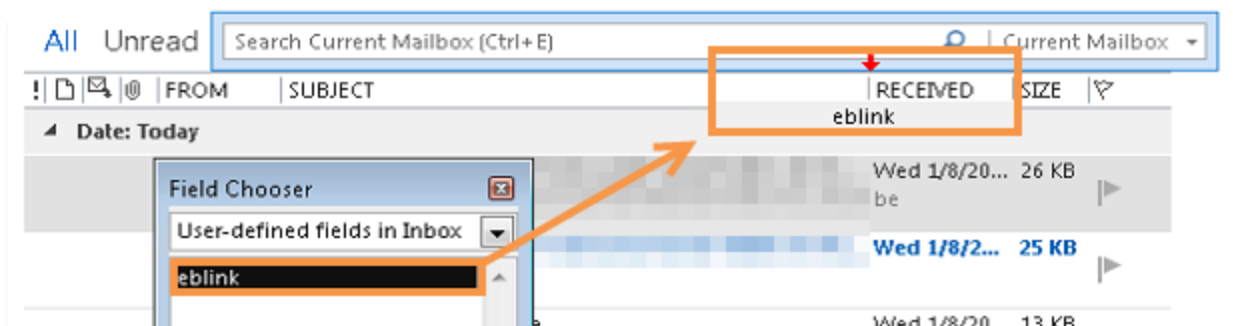3. Right-click the column headers bar.
4. Click **Field Chooser**.
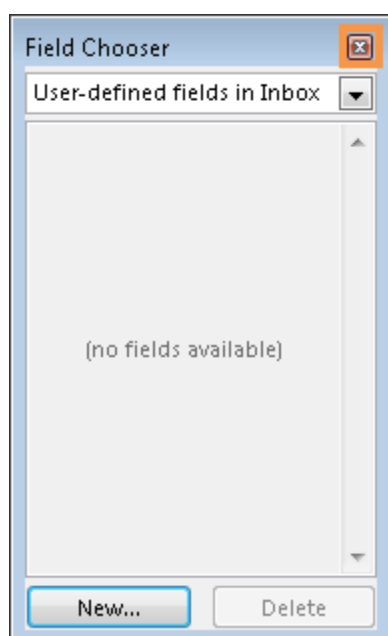
5. Click **New…**

6. Configure the new field like the image below. (i.e. Name: eblink, Type: Yes/No, Format: Icon)
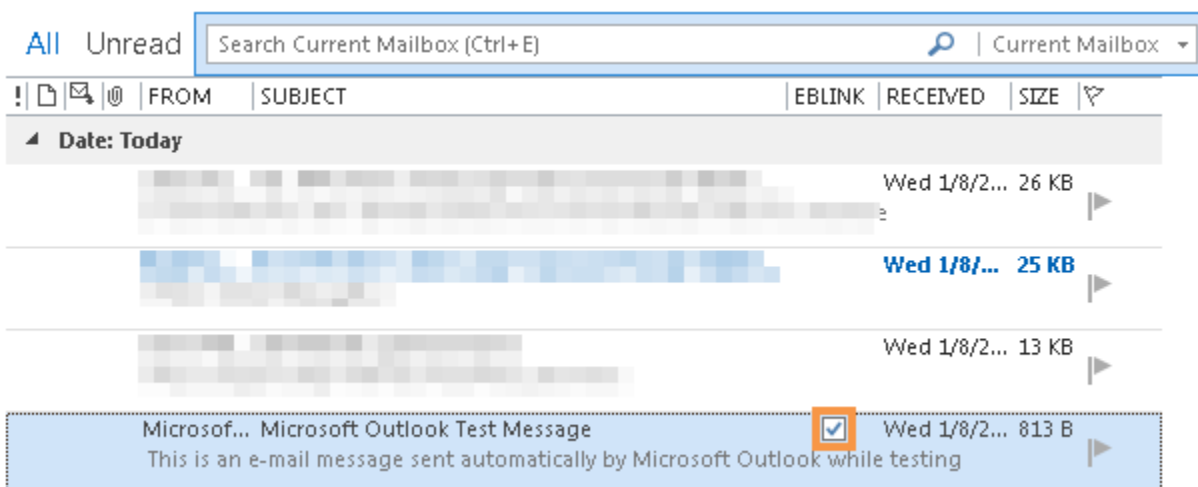
7. Click **OK.**

8. Drag and drop the black EbLink box up into the header columns bar.
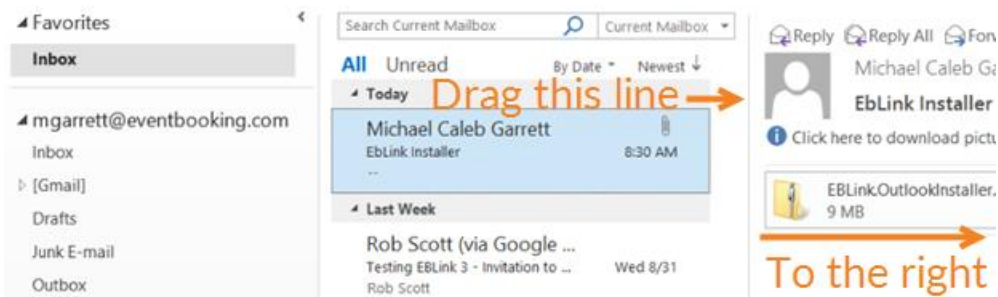
9. Click **X** to close the field chooser.

10. You now have EbLink as a column in your email. You will see a checkbox icon in the EbLink column after you upload a message to EventBooking via EbLink.

Outlook 2013

1. Navigate to your inbox.
2. Drag the preview frame to the right until you can see all the column headers.


3. Right-click the column headers bar.
4. Click **Field Chooser**.

5. Click **New…**

6. Configure the new field like the image below. (i.e. Name: eblink, Type: Yes/No, Format: Icon)
7. Click **OK**.

8. Drag and drop the black EbLink box up into the header columns bar.

9. Click **X** to close the field chooser.

10. You now have EbLink as a column in your email. You will see a checkbox icon in the EbLink column after you upload a message to EventBooking via EbLink.

Outlook 2016

1. Navigate to your inbox.

2. Drag the preview frame to the right until you can see all the column headers.

3. Right-click the column headers bar.
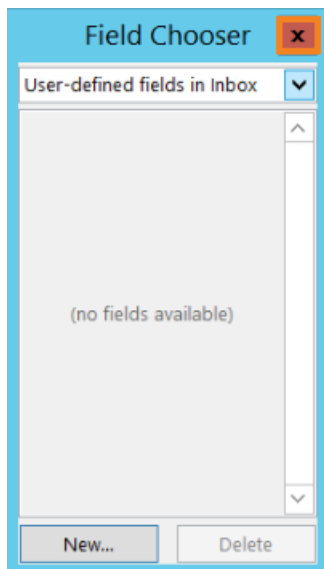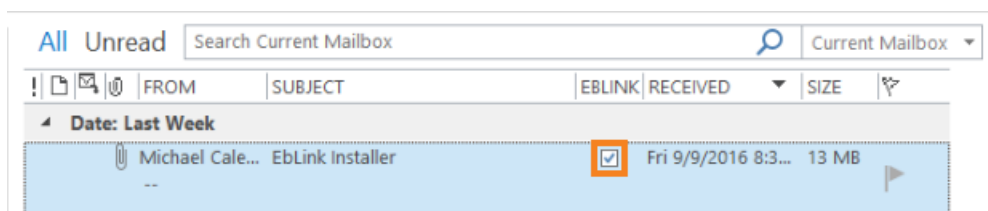
4. Click **Field Chooser**.
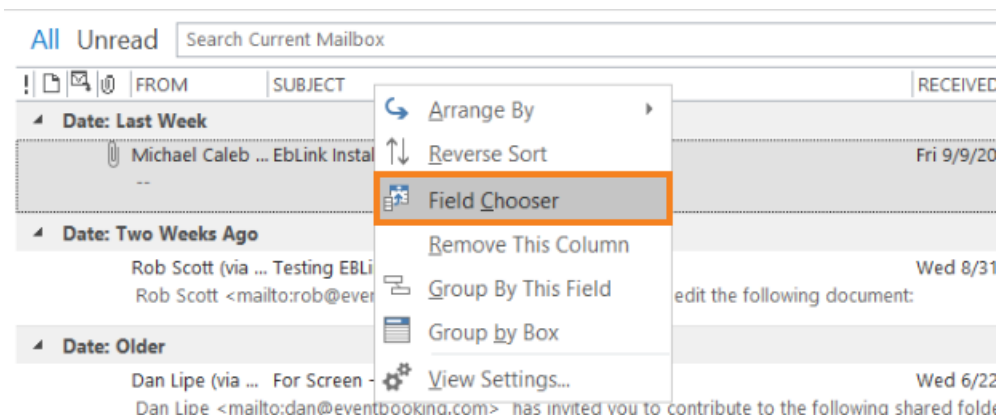
5. Click **New...**

6. Configure the new field like the image below. (i.e. Name: eblink, Type: Yes/No, Format: Icon)

7. Click **OK**.
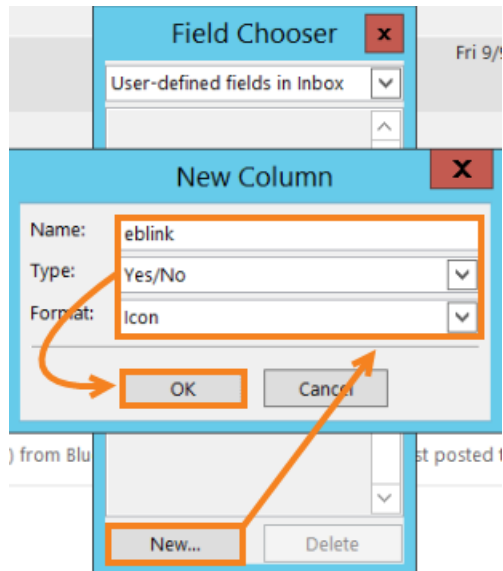
8. Drag and drop the black EbLink box up into the header columns bar.
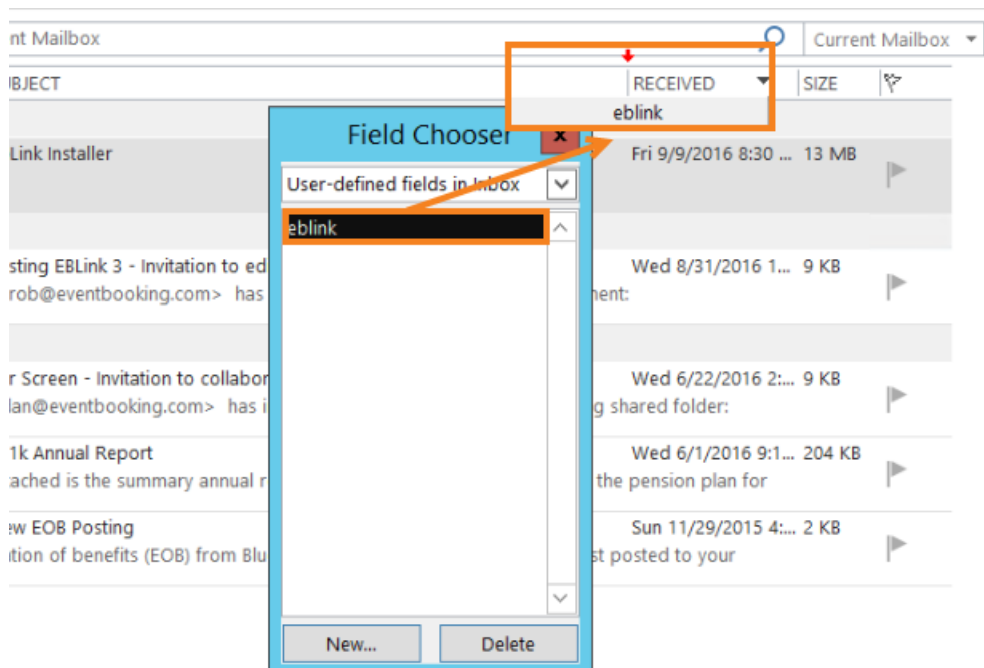
9. Click **X** to close the field chooser.

10. You now have EbLink as a column in your email. You will see a checkbox icon in the EbLink column after you upload a message to EventBooking via EbLink.
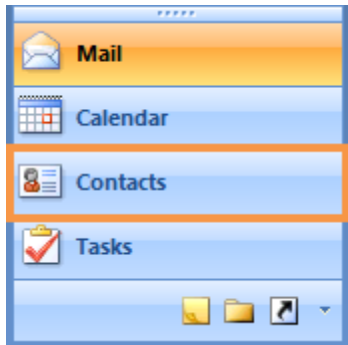
Adding an EbLink Column to Your Contacts

You can add an EbLink column to your contacts in the list mode to indicate with small icons whether you have already pushed a contact to EventBooking with EbLink.
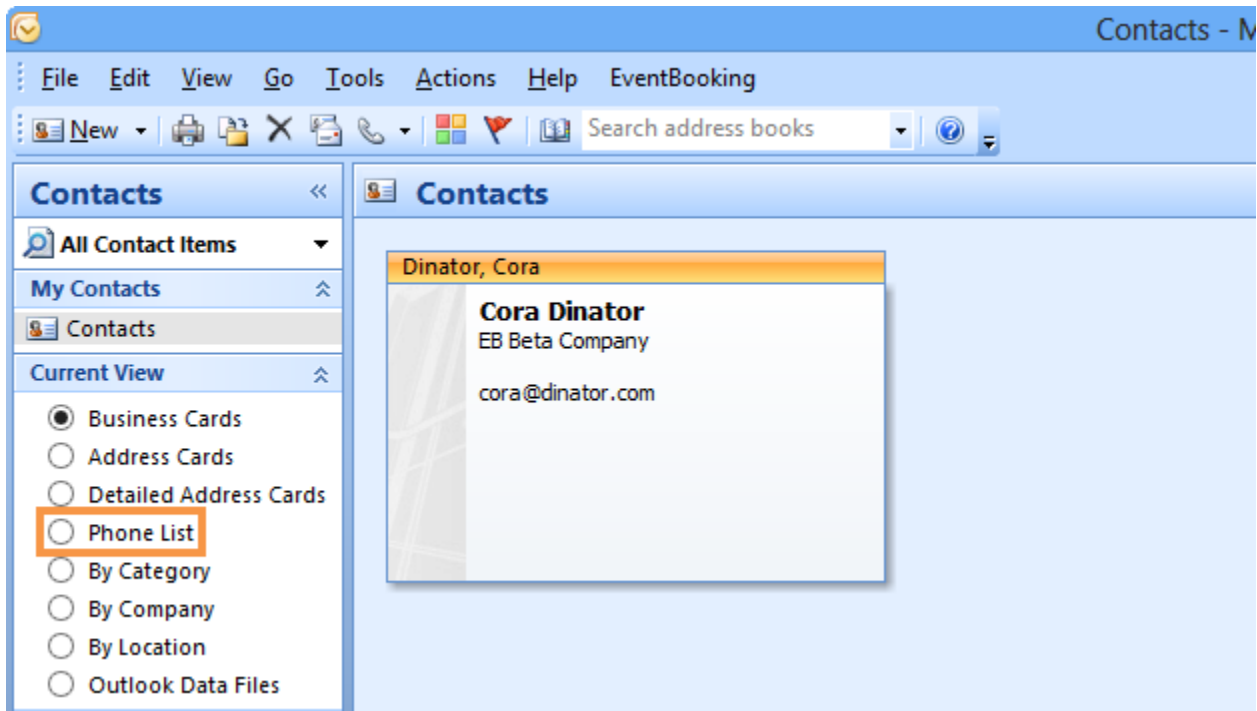
Configure for:

1. Outlook 2007
2. Outlook 2010
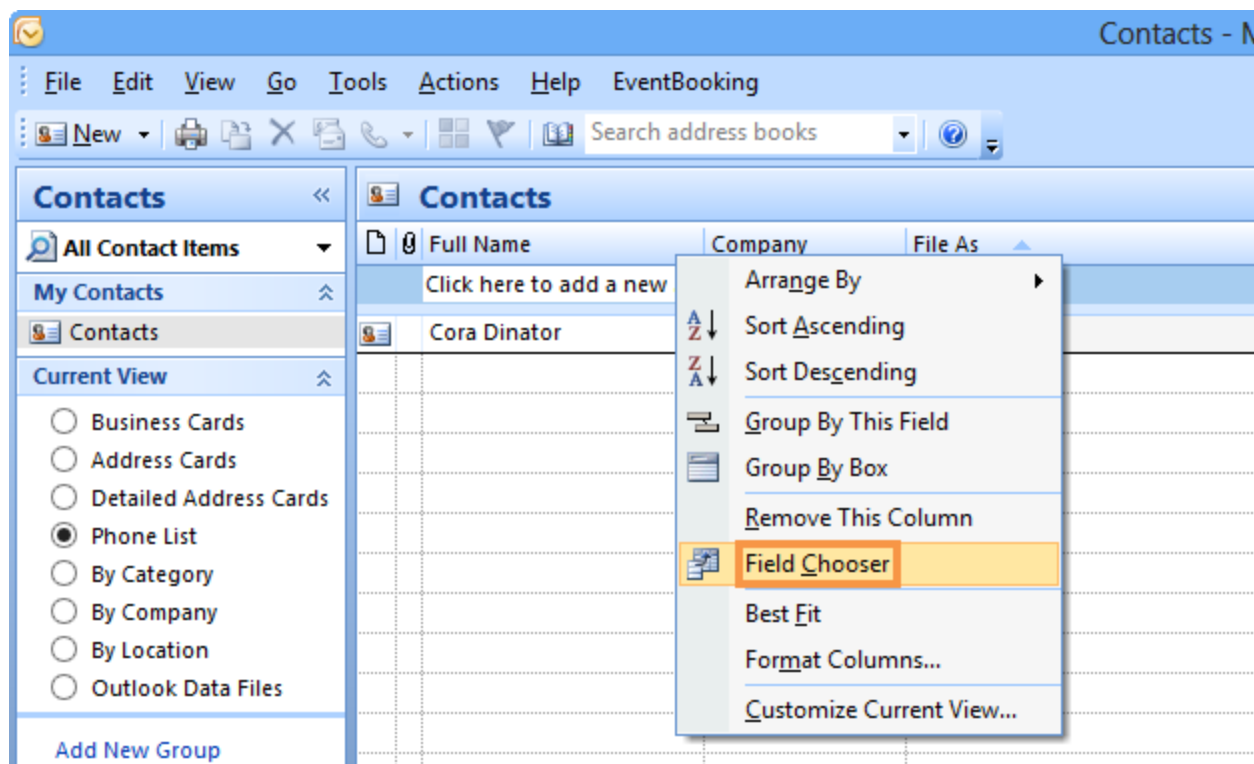3. Outlook 2013
4. Outlook 2016

Outlook 2007

1. Click **Contacts** in the bottom-left of the Outlook window.

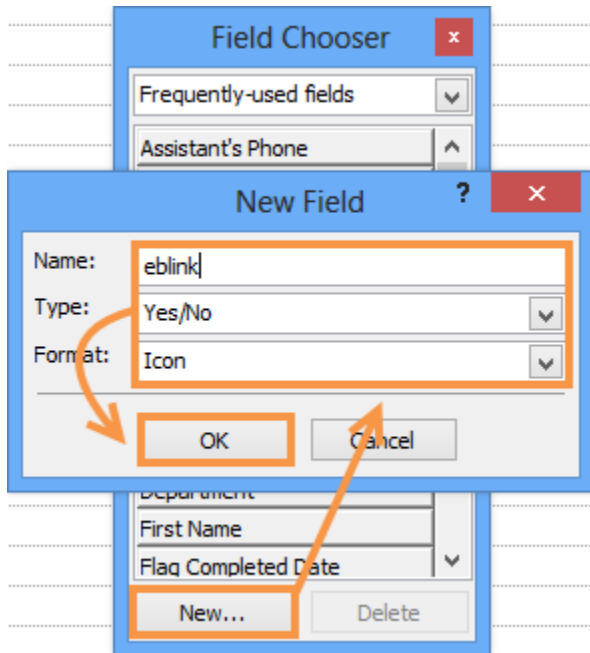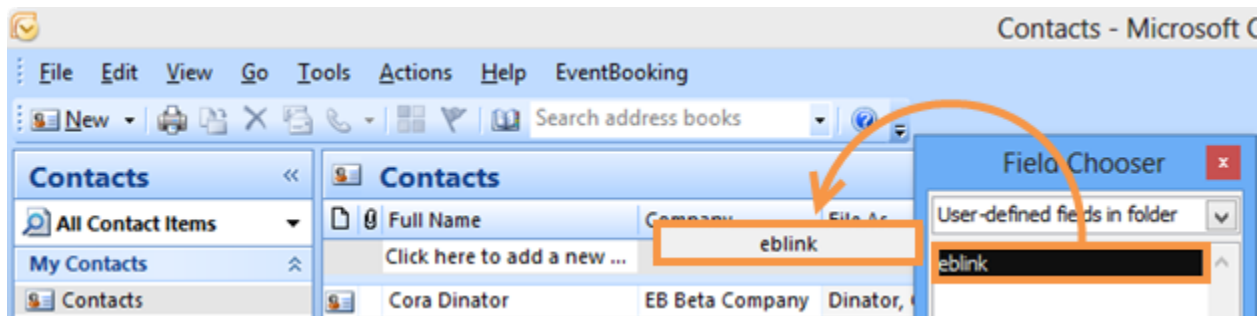2. Click the **Phone List** radio button on the left side of the Outlook window.

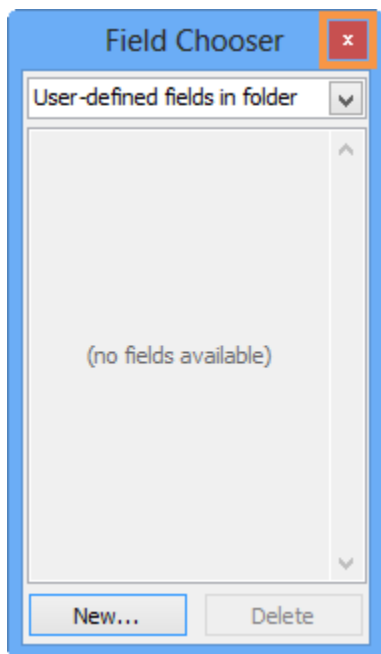3. Right-click the column headers bar.

4. Click **Field Chooser**.

5. Click **New…**

6. Configure the new field like the image below. (i.e. Name: eblink, Type: Yes/No, Format: Icon)

7. Click **OK**.

8. Drag and drop the black EbLink box up into the header columns bar.

9. Click **X** to close the field chooser.

10. You now have EbLink as a column in your contacts. You will see a checkbox icon in the EbLink column after you upload a contact to EventBooking via EbLink.
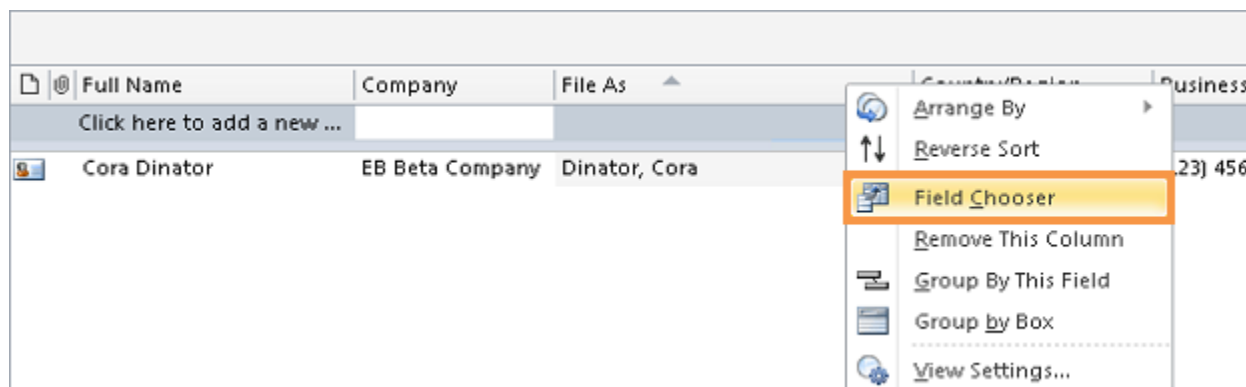
Outlook 2010

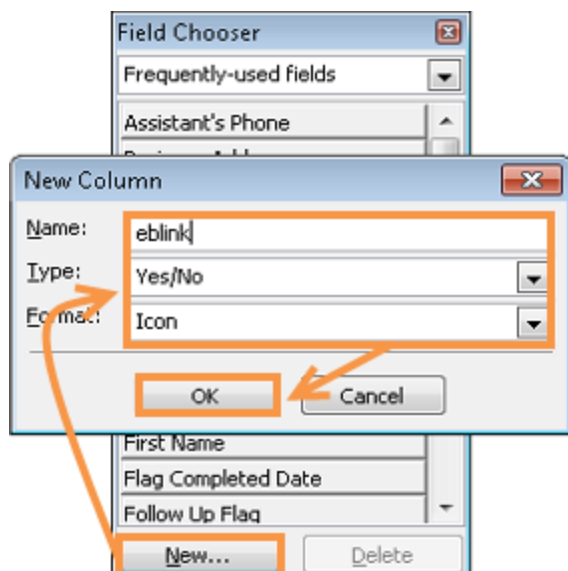1. Click **Contacts** in the bottom-left of the Outlook window.

2. Click **Phone** on the *Home* tab of the menu ribbon.
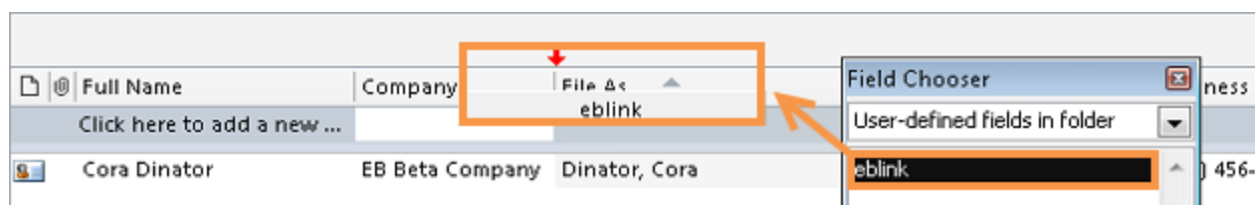

3. Right-click the column headers bar.
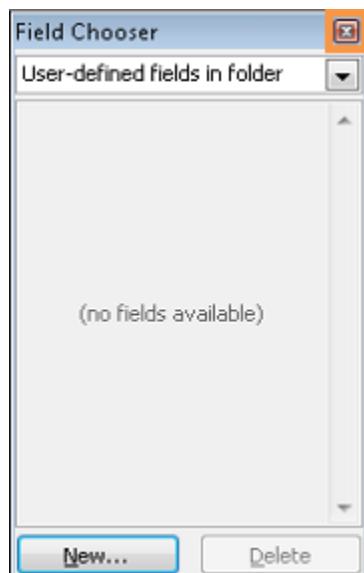4. Click **Field Chooser**.

5. Click **New...**

6. Configure the new field like the images below. (i.e. Name: eblink, Type: Yes/No, Format: Icon)

7. Click **OK**.

8. Drag and drop the black EbLink box up into the header columns bar.

9. Click **X** to close the field chooser.

10. You now have EbLink as a column in your contacts. You will see a checkbox icon in the EbLink column after your upload a contact to EventBooking via EbLink.
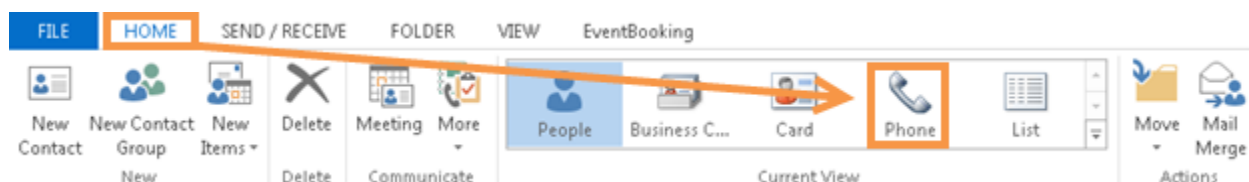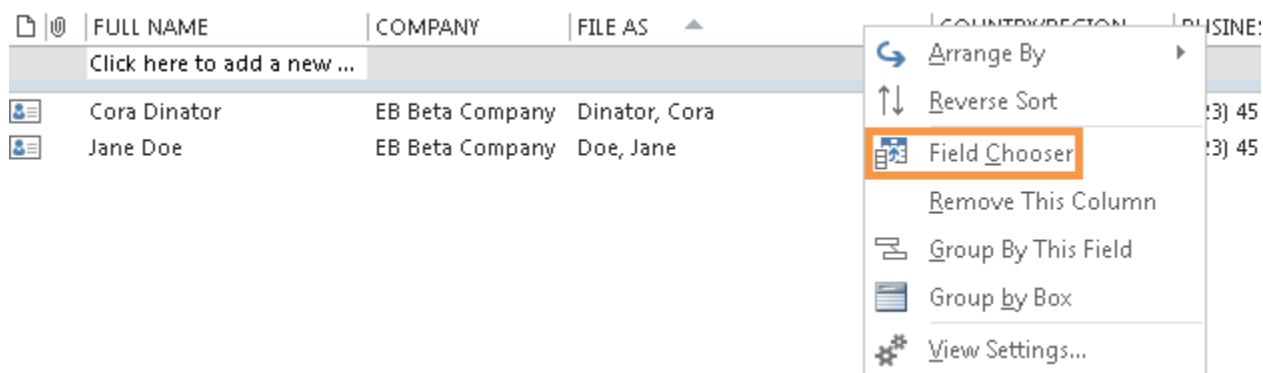
Outlook 2013

1. Click **People** in the bottom-left of the Outlook window.
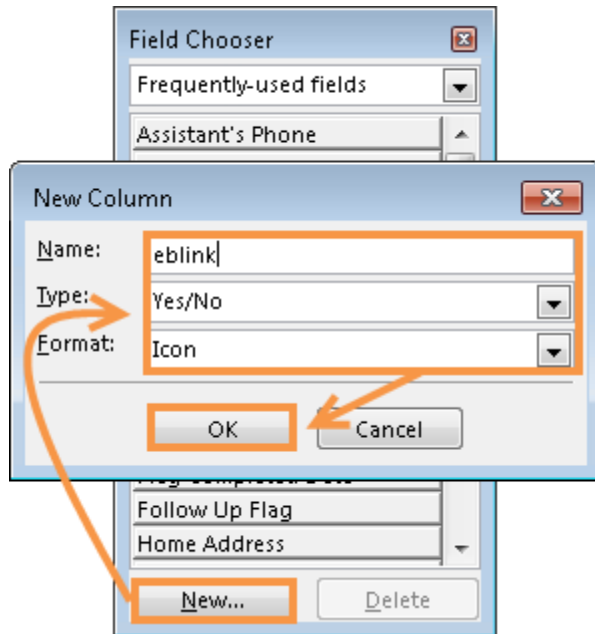

2. Click **Phone** on the *Home* tab of the menu ribbon.
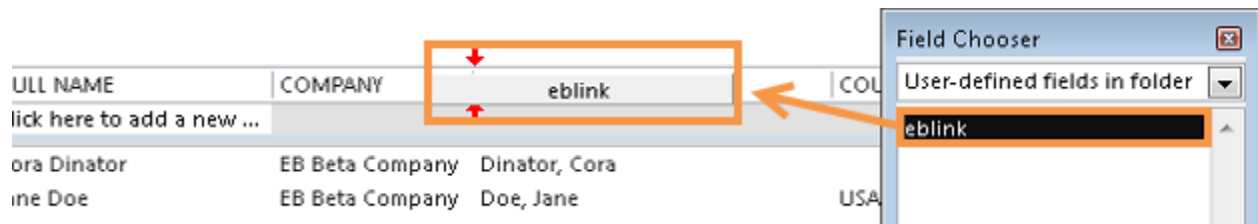

3. Right-click the column headers bar.
4. Click **Field Chooser**.

5. Click **New...**

6. Configure the new field like the image below. (i.e. Name: eblink, Type: Yes/No, Format: Icon)

7. Click **OK**.

8. Drag and drop the black EbLink box up into the header columns bar.

9. Click **X** to close the field chooser.

10. You now have EbLink as a column in your contacts. You will see a checkbox icon in the EbLink column after you upload a contact to EventBooking via EbLink.
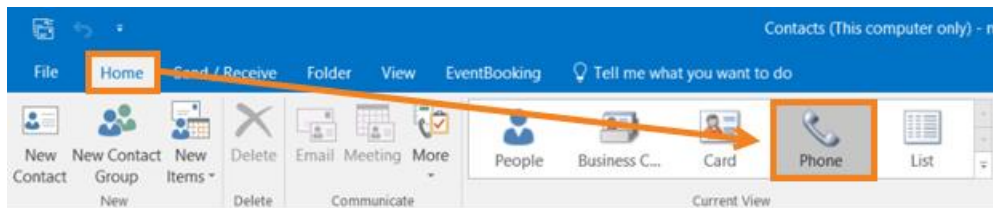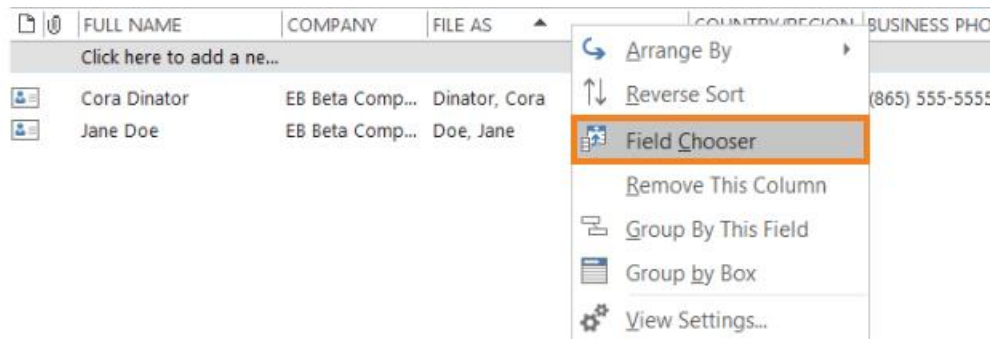
Outlook 2016

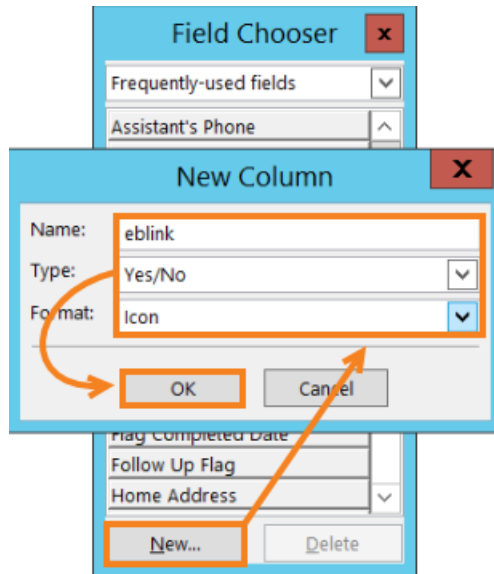1. Click the contacts icon in the bottom-left of the Outlook window.

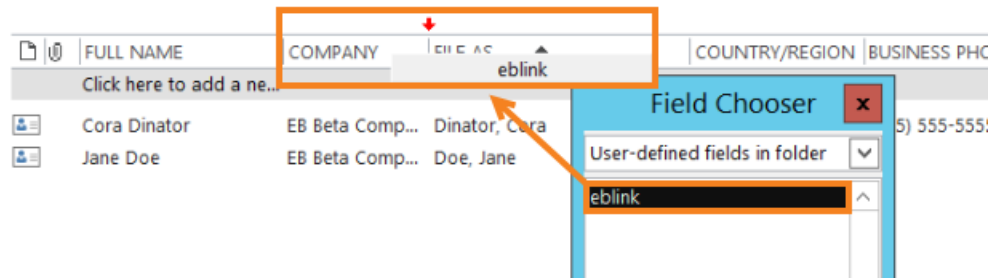2. Click **Phone** on the *Home* tab of the menu ribbon.

3. Right-click the column headers bar.
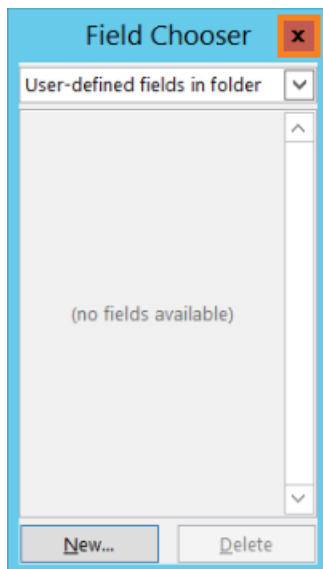4. Click **Field Chooser**.

5. Click **New...**

6. Configure the new field like the image below. (i.e. Name: eblink, Type: Yes/No, Format: Icon)

7. Click **OK**.

8. Drag and drop the black EbLink box up into the header columns bar.

9. Click **X** to close the field chooser.

10. You now have EbLink as a column in your contacts. You will see a checkbox icon in the EbLink column after you upload a contact to EventBooking via EbLink.