



# Add Email Address User's Manual

## Contents

Welcome.....	2
Configuring the Add-in.....	3
Settings Tab .....	4
Scan Now Tab .....	6
Advanced Tab .....	7
Troubleshooting.....	8

## **Welcome**

Thank you for choosing Add Email Addresses Add-in, created by Sperry Software. Add Email Addresses enables you to automatically add contacts and email addresses to your contact list when you send messages or reply to messages. You can also add new contacts and email addresses from the active message, or from multiple selected messages, simply by clicking a button.

An option to “Scan Now” allows you to quickly populate your Contact list from your existing messages. If a contact is found in the specified search folder(s) which already contains the email address you want to add, a duplicate contact will not be created.

You can choose to set a default category for newly created contacts, copy the contact category from the email, or do nothing with categories.

## Configuring the Add-in

Once the installation is complete, you are ready to use Add Email Addresses. When you open Outlook you will notice that a new tab “Sperry Software” displays on the Ribbon.

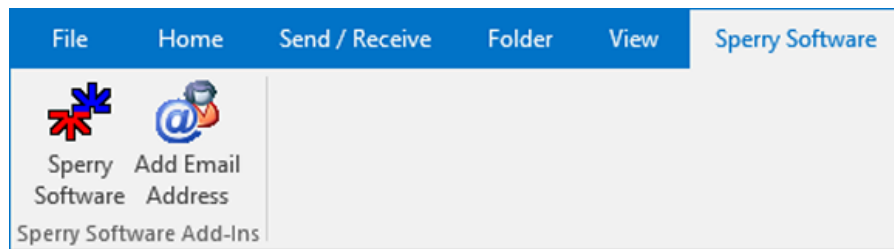


Figure 1 (Sperry Software tab - Outlook 2016)

Clicking the Sperry Software button displays the Sperry Software Add-in Configuration screen. It is on this screen that settings are made to control the functionality on the Add-in.

## Settings tab

This tab allows you to set up the parameters that will be used to automatically and/or manually add message email addresses to your Contact list.

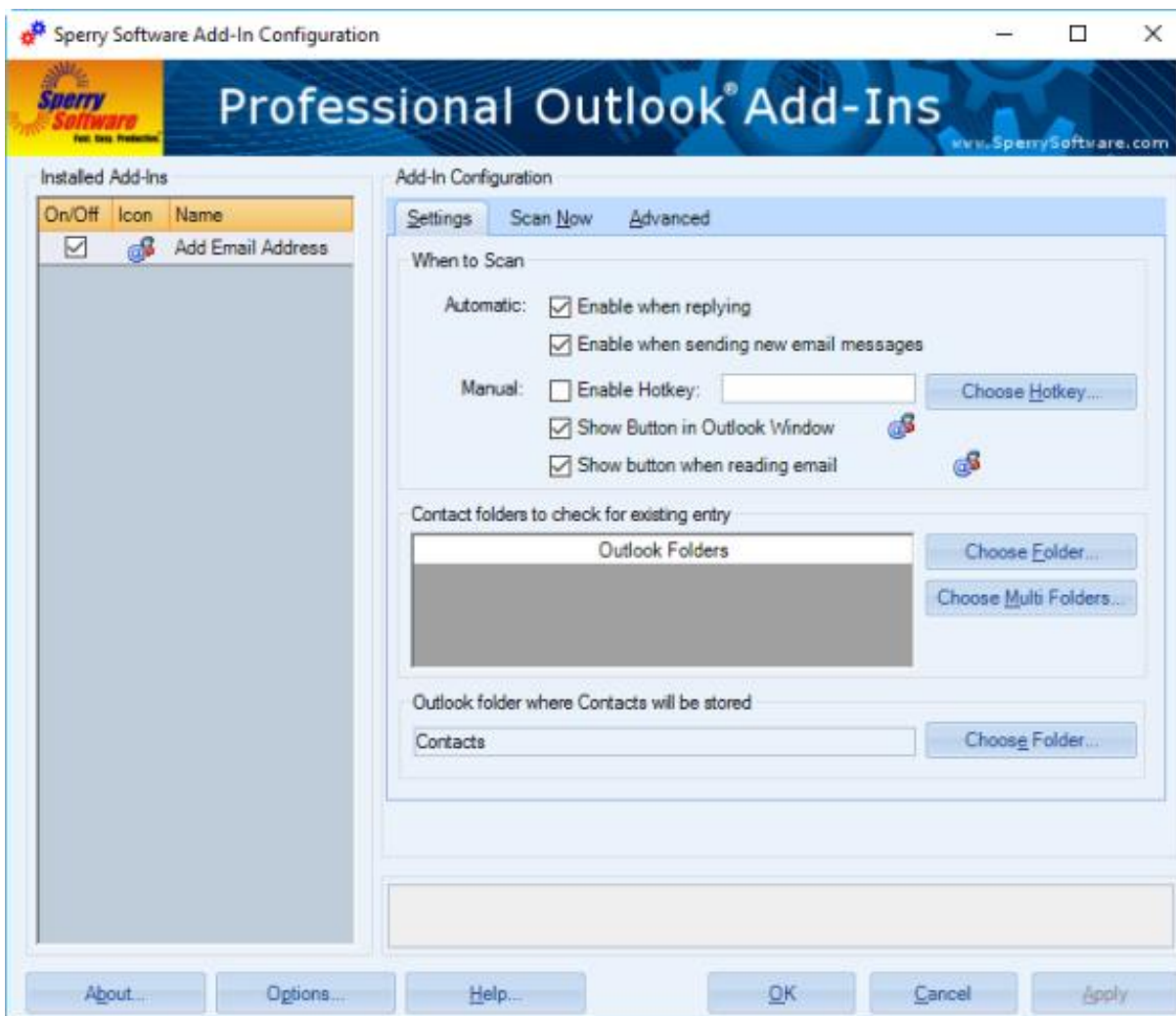


Figure 2-(Sperry Software Add-in Configuration dialog box)

- **“When to Scan”** provides options for automatic and manual activation:
  - **“Automatic:”** allows you to specify under what conditions email addresses will be added to your Contacts list automatically. The available options are Enable when replying and Enable when sending new email messages. If either of these two are checked, the Add-in will turn the email address into a contact whenever that action is performed.
  - **“Manual:”** allows you to specify how you want to add email addresses to your Contact list by choosing the messages manually. The options are Enable Hotkey, Show Button in Outlook Window, and Show Button when reading email. To add a contact, select or activate the message then click the button or invoke the designated Hotkey.

- The “**Contact folders to check for existing entry**” list allows you to choose one or more folders to be checked before adding the email address(es) to your Contact list. If an existing contact with the same address is found in any of the specified folder(s), a new contact will not be added.
- The “**Outlook folder where Contacts will be stored**” is the Outlook folder where the new contacts will be created.

## Scan Now tab

This tab allows you to quickly create Contacts from existing email messages.

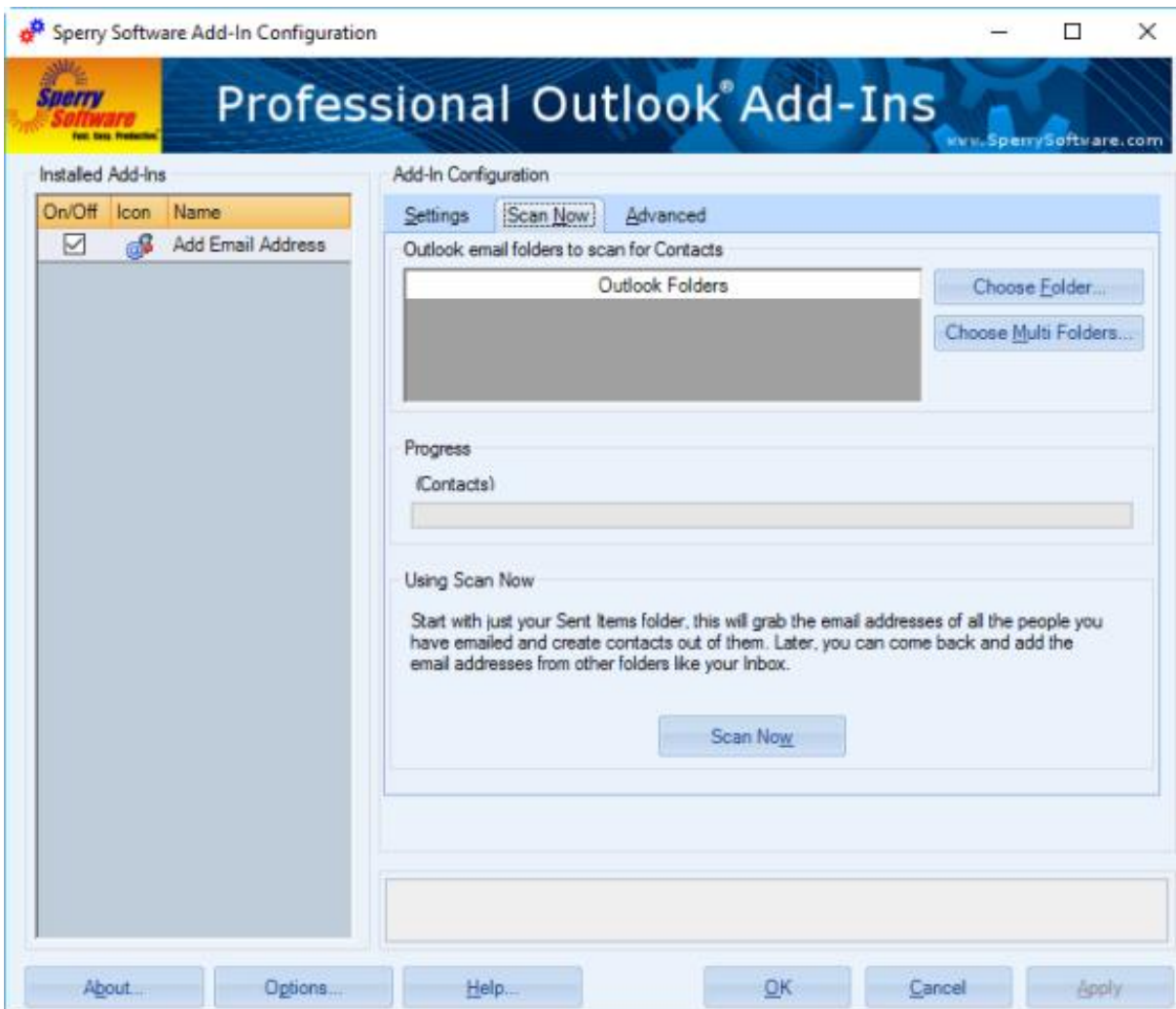


Figure 3-(Scan Now tab in the Sperry Software Add-in Configuration dialog box)

To create contacts, choose one folder (by clicking the **“Choose Folder”** button) or more folders (by clicking the **“Choose Multi Folders”** button) to search, then click the **Scan Now** button.

Tip: To get the most contacts in the shortest time, start with your Sent Items folder. Once those contacts have been added, you can return to this tab and create contacts from other folders, such as vendor or project folders.

## Advanced tab

Enables you to set advanced options for the Add-in.

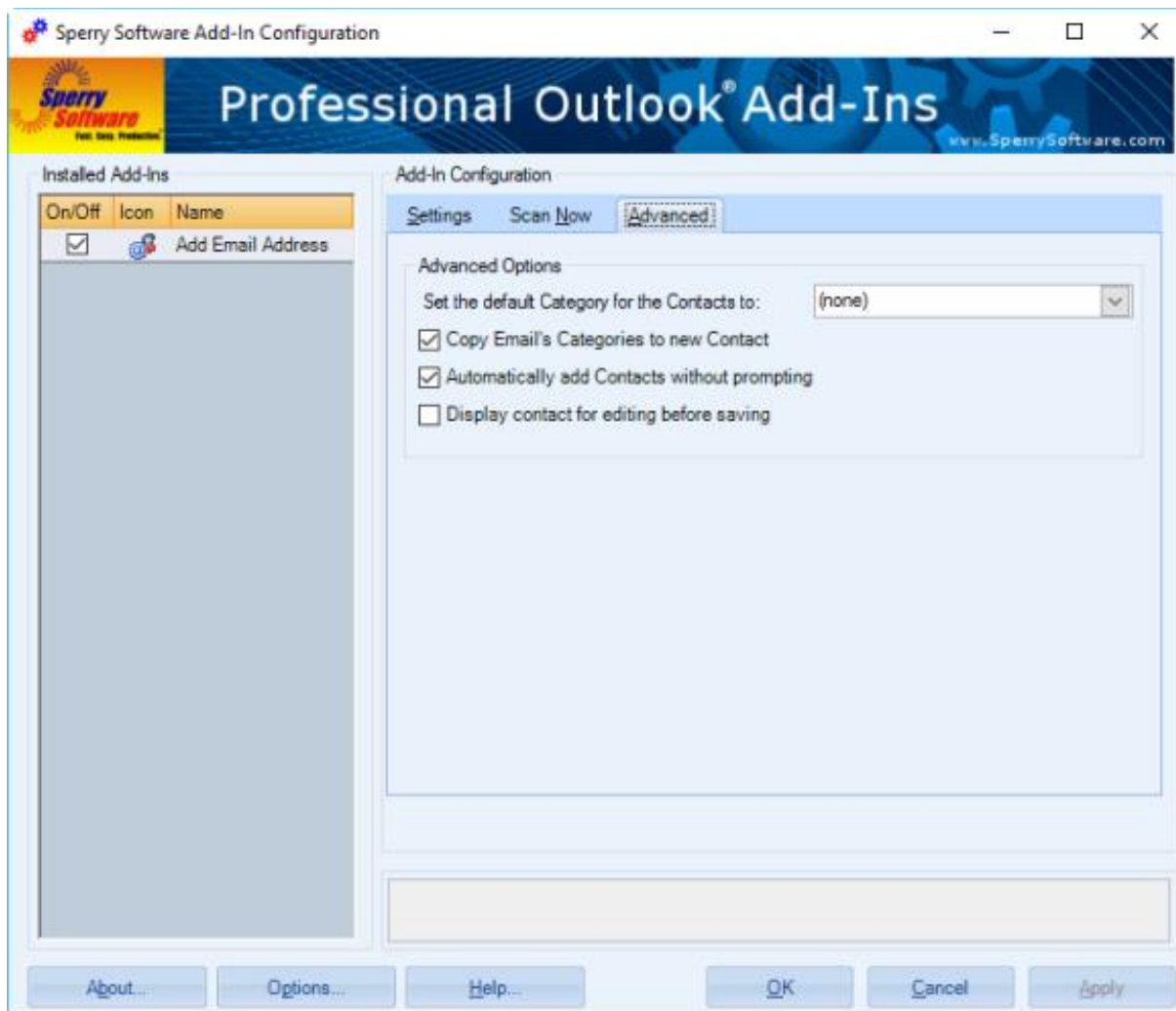


Figure 4-(Advanced tab in the Sperry Software Add-in Configuration dialog box)

The Advanced options let you set the default category for Contacts, Automatically add Contacts without prompting, whether to copy the category from the email to the contact, copy the email's categories to the new contact, and whether to add contacts without prompting for approval.

TIP: If you deselect Automatically add Contacts without prompting, a grid showing all the email addresses is shown before the contacts are created. You can then select or deselect each name individually.

The last option, "Display contact for editing before saving", causes the contact to be displayed before being saved. This is useful if you have other information about the contact that you want to add. If you use the option, it will be necessary to Save and Close the contact yourself when you have finished editing.

## Troubleshooting

Q. The “Sperry Software Add-ins” button is not visible.

A. There could be several reasons for this. See this article to figure out how to resolve this problem:

<https://sperrysoftware.freshdesk.com/solution/articles/5000626926-i-installed-the-add-in-but-i-can-t-see-it-in-outlook->

Q. The “Sperry Software Add-ins” button does not pull up the Configuration window.

A. Run the add-in Reset tool.

The add-in reset tool can be downloaded from

<http://www.sperrysoftware.com/outlook/tools.asp>

Q. How can we contact you for more help?

A. For help on more in-depth issues, check out our [Knowledge Base](#) especially the FAQ about how to enter a bug report.