

Installing the Neos Outlook Add-In

The Neos Add-in for Outlook allows you to file emails into a Case from Outlook Web, desktop, or mobile. You can also use the add-in to view Party and Provider contact information.

Neos Recommends: Firm Administrators that have a Microsoft 365 Global Admin account deploy and manage the Outlook add-in for all users. Refer to [Deploy add-ins in the admin center](#) for the full process from Microsoft. The Neos Outlook Add-in XML file (from step 2 – Outlook Web section) must be uploaded to the admin center. Once the add-in is deployed, it will be available for all users in Outlook Online and Desktop, however, you may need to relaunch Microsoft 365 to view the add-in icon in the ribbon. NOTE: It may take up to 24 hours for the Neos Outlook Add-in to appear in Outlook.

If your firm's Global Admin does not deploy the add-in, these installation instructions must be performed by each individual Neos user.

Once installed for each user, the add-in will be updated automatically. After a release, users may be automatically directed to the login screen where they should enter their Neos credentials to continue using the Outlook Add-in. In addition, each user must have their Office 365 email connected in their Neos Staff Profile to tag emails, attachments, and appointments.

NOTE: The Neos Outlook Add-in is supported and installed on individual Microsoft 365 accounts. For users that have multiple Microsoft mailboxes, the add-in must be installed for each additional account in Outlook **Desktop**.

Outlook **Web** will only show one mailbox account in a browser session. To use the add-in for another Microsoft 365 email account, open an incognito browser session and log in using the second email. Install the Neos Outlook Add-in for that second account, then switch between browser sessions to tag emails from the different mailboxes.

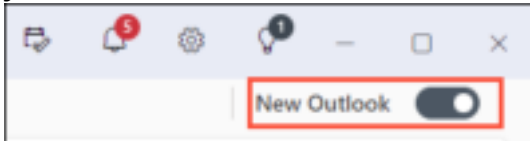
Refer to Microsoft's guide on [Using add-ins in Outlook on the web](#) for add-in requirements with your platform (in the Frequently asked questions section) for more details.

NOTE: All staff should remove the previous version before installing the latest Outlook Add-in using the new URL (refer to step 6).

Please follow these instructions to **install** the add-in:

From Outlook Desktop

To install the Neos Outlook Add-in from your desktop version of Outlook, make sure you have the New Outlook, shown here:



NOTE: If you don't have the New Outlook, follow the **Outlook Web** steps to install the add-in from Outlook online.

While we do support both classic and New Outlook, it is recommended to use the latest version of Outlook (New Outlook) with the Neos Outlook Add-in.

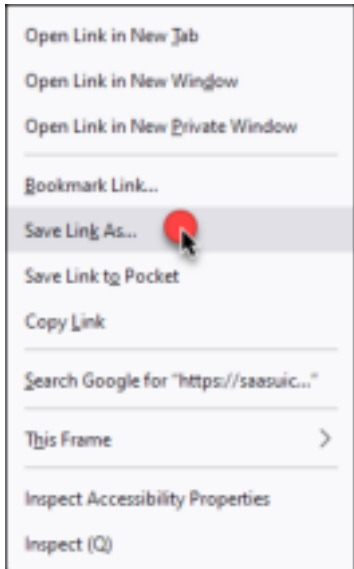
1. Click on the **Home** ribbon with your Outlook Desktop.
2. Select **Get Add-ins** from the Add-ins group.

NOTE: If this button is grayed out, you must first enable your [Outlook Privacy Settings](#).

3. Follow the **Outlook Web** instructions.

From Outlook Web

1. Close your desktop version of Outlook.
2. Right-click the following URL and select the Save Link As... option.
<https://saasuicdn.blob.core.windows.net/neosoutlookplugin/manifest.xml>



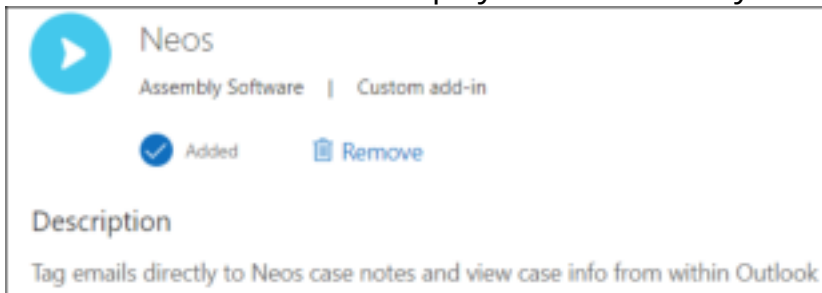
3. Rename the XML file from “manifest” to “Outlook Add-in”. By default, the file will be saved to your Downloads folder but a different folder can be selected.
4. Click <https://aka.ms/olksideload> to directly access the Add-Ins for Outlook window. You may be prompted to first login with your Microsoft 365 credentials. When logged in, the Add-Ins for Outlook window will display after a brief moment.
5. Click the **My add-ins** tab and scroll to the Custom add-ins section. Click the **Add a custom add-in** dropdown and select **Add from File...**



6. In the Open window, browse to the folder containing the saved XML file (from step 3). Select the file and click the **Open** button.
7. Click the **Install** button on the Warning window to continue with the installation.



8. **SUCCESS!** The add-in will display as  **Added** in your My add-ins section.



After the Outlook add-in has been installed, re-open your desktop version of Outlook to ensure that the add-in group is visible on the Home ribbon. If installed from Outlook Desktop, select an email in your inbox to ensure the **All Apps** group is visible.

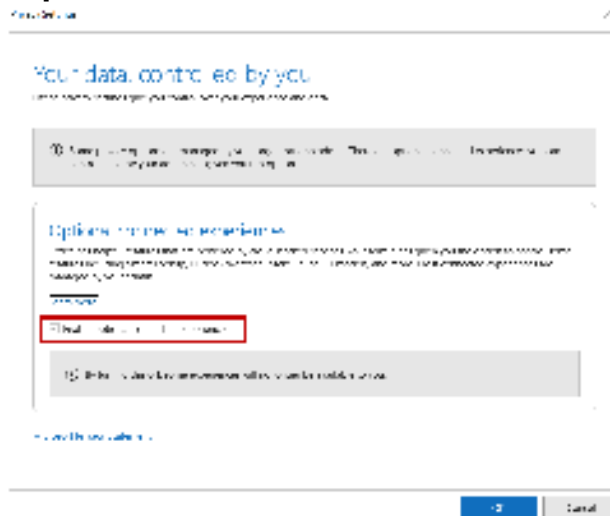
Outlook Privacy Settings

If you do not see the add-in in your desktop Outlook, refer to the following steps for confirming your Outlook privacy settings:

Classic Outlook

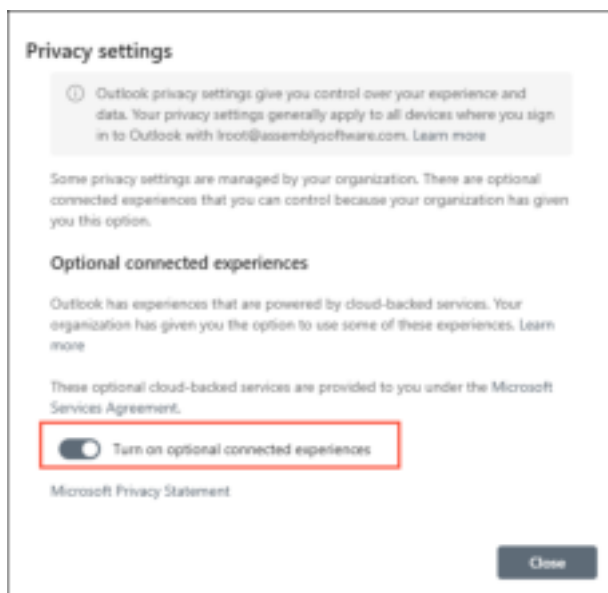
1. In Outlook, select the **File** tab and choose **Office Account**.
2. Select **Manage Settings** under Account Privacy.

- On the Privacy Settings window, ensure the **Enable optional connected experiences** check box is selected. Click the **OK** button to close the window.




New Outlook

- In New Outlook, click the Settings (gear) icon on the upper left.
- Select General > Privacy and data and then click the **Privacy settings** button.
- On the Privacy Settings window, ensure the **Turn on optional connected experiences** slider is enabled. Click the **Close** button to close the window.



If you are not seeing the most recent changes to the Neos Outlook Add-in (e.g., "Tagged In Thread"):

1. In Outlook, navigate to **More Apps**  > **Add Apps**.
2. Select the **Manage your apps** option on the bottom left of the window.
3. Click the Neos Outlook Add-in, then click the blue **Open** button. This will refresh the add-in.



4. Navigate to the add-in like normal (you may need to log in again).

To **remove** the Outlook add-in:

1. Follow the [install instructions](#) from above and then at step 6, click the My add-ins tab and scroll to the Custom add-ins section. Click the three dots button and select the **Remove** option.

