



Installation guide



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1. Introduction

The Installation Guide takes you step-by-step through the process of installing the Connectid Add-in on your Office365 Outlook as well as the Outlook desktop client for Windows and Mac. The document covers installing the add-in by a user from Office Store or using manifest file and the installation process for Tenant Administrator deployment methods to distribute the add-in to users within an organization.

2. Install Connectid Mail on Outlook web from the Office Store

2.1. Prerequisite

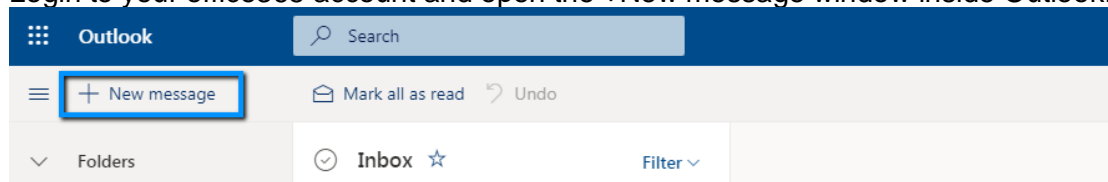
To install Connectid Mail you will need an office 365 account with valid inbox license.

- i) Go to <https://outlook.office.com/owa/>
- ii) Login with your Office 365 email address and password

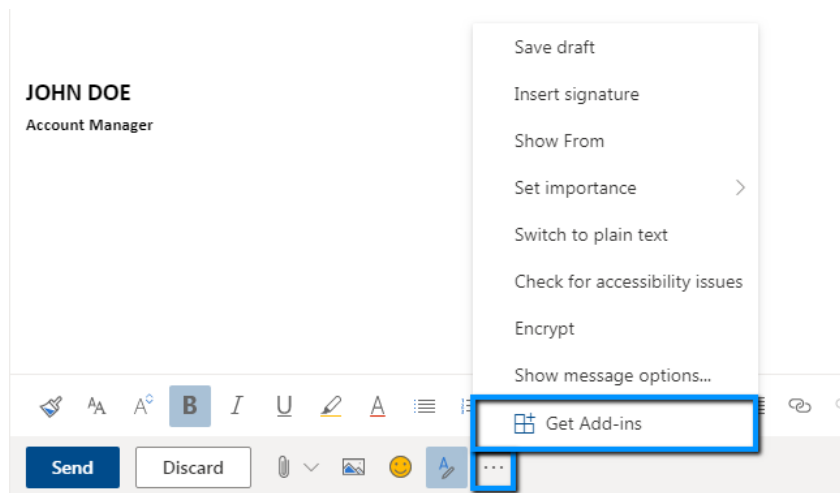
2.2. Installation

Follow the instructions below to install the Connectid Mail add-in.

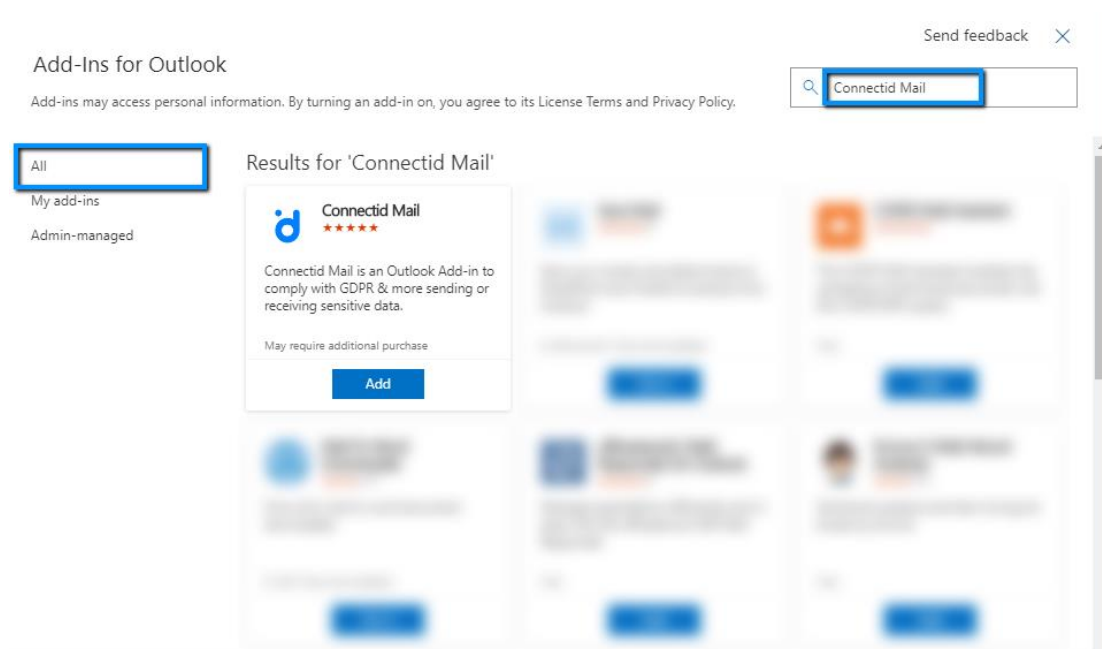
- i) Login to your office365 account and open the +New message window inside Outlook.



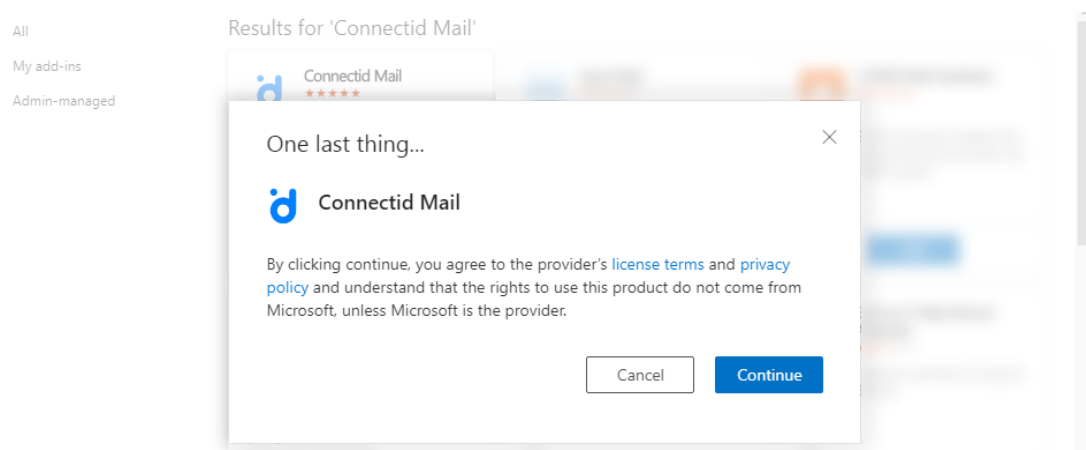
- ii) Click on the more options icon at the bottom tool bar, mail sending area and choose the Get Add-ins option.



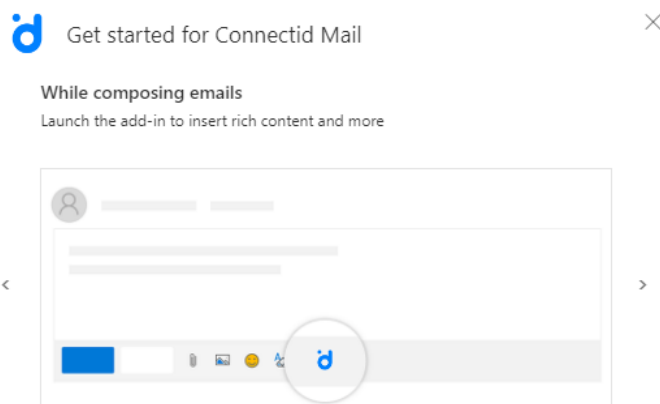
- iii) On the Add-ins for Outlook page, browse for the “Connectid Mail” add-in by scrolling through the list, or search for the add-in by using the Search box.



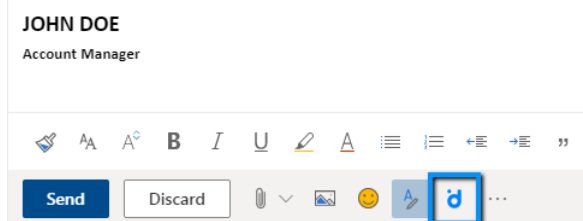
- iv) After finding the add-in click on the Add button, review its privacy policy and then click on Continue to finish adding to your Outlook.



- v) After the installation finishes, checkout the getting started information and close it.

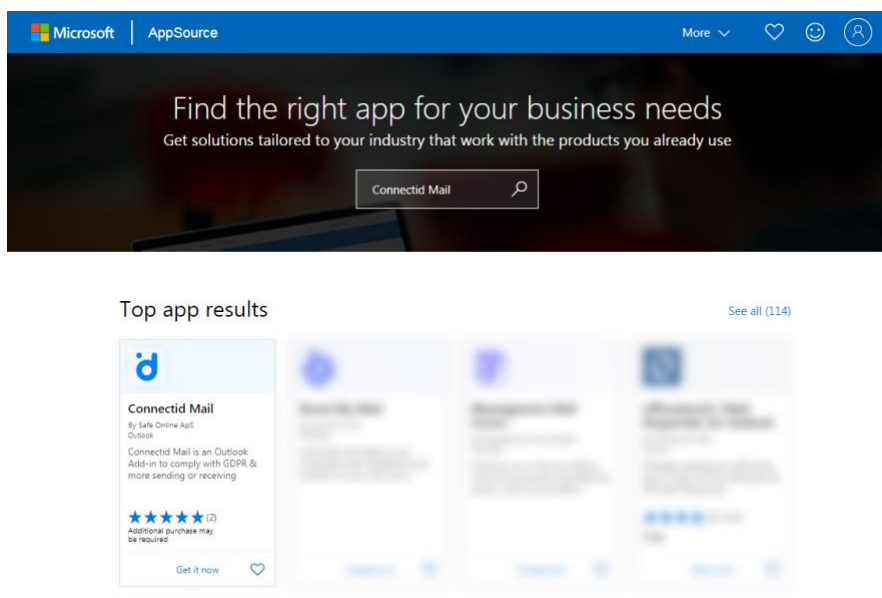


- vi) The Connectid Mail add-in can be found at the bottom of the mail compose area ready for use. When using, if you're prompted to sign in, type the email address and password you use to sign in to Office programs.

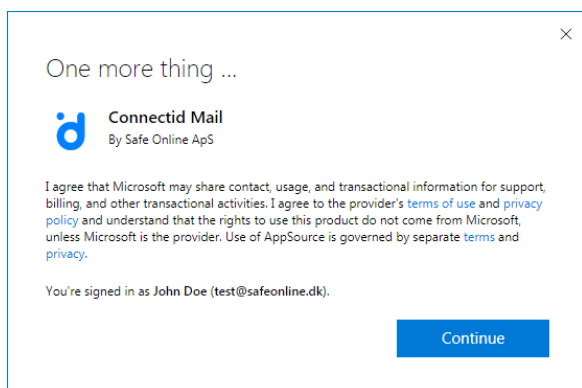


Or, you can install the Connectid Mail add-in directly from the Office store.

- Login to your office365 account and go to office store (<https://appsource.microsoft.com>).
- Search for the Connectid Mail add-in and use the Get it now link to install.



- iii) Review its privacy policy and click on the Continue button to finish adding it to your Outlook.



- iv) After finishing installation, the add-in can be found at the bottom of the mail compose area ready for use. When using, if you're prompted to sign in, type the email address and password you use to sign into Office programs.

3. Install Connectid Mail on Outlook desktop from the Office Store

3.1. Prerequisite

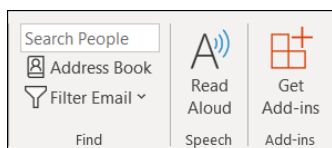
To install Connectid Mail you will need an office 365 account and that email should be configured in the Outlook desktop client.

- i) Install Outlook desktop client 2013 (with update) or upper if not installed already.
- ii) Add the office365 email account on Outlook desktop client to which the add-in will be added.

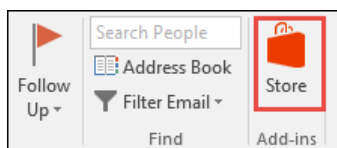
3.2. Installation on Outlook desktop client

Follow the instructions below to install the Connectid Mail add-in on Outlook desktop client.

- i) On Windows: Open the Outlook desktop client with the office365 email account configured and click Home > Get Add-ins on the ribbon.

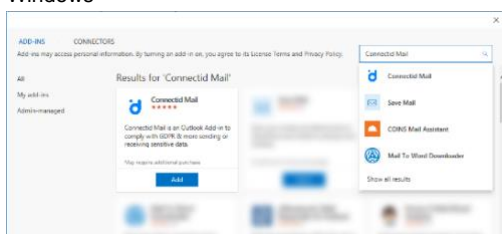


On Mac: Open the Outlook desktop client and click Home > Store on the ribbon.

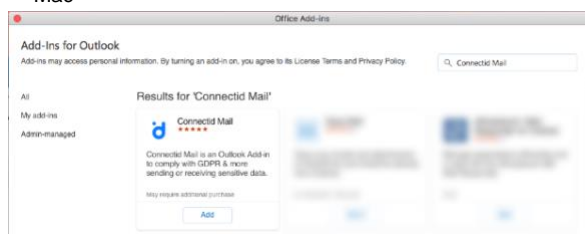


- ii) On the Add-ins for Outlook page, browse for the “Connectid Mail” add-in by scrolling through the list, or search for the add-in by using the Search box.

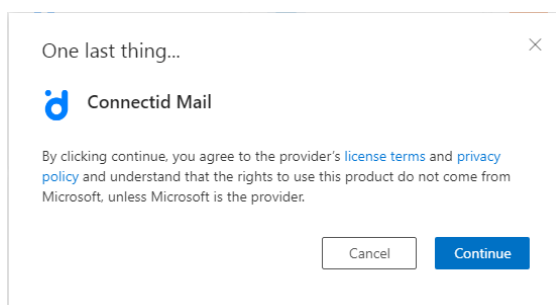
Windows



Mac

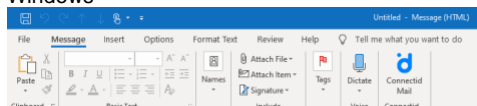


- iii) After finding the add-in click on the Add button, review its privacy policy and then click on Continue to finish adding to your Outlook.



- iv) After the installation finishes, checkout the getting started information and/or close the Add-ins for Outlook page.
- v) The Connectid Mail add-in can be found on the ribbon of the message tab ready for use. When using, if you're prompted to sign in, type the email address and password you use to sign into Office programs.

Windows



Mac



4. Upgrading Connectid Mail on Outlook desktop/ web

To upgrade to a newer version of an Outlook add-in from Office Store, the previous installed version needs to be removed from Outlook and then the newer available version should be installed. It's quite easy to remove and re-install any add-in from Office Store.

4.1. Prerequisite

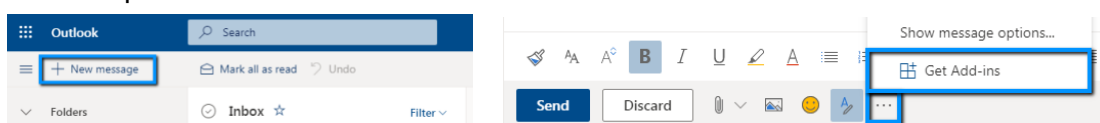
To upgrade Connectid Mail you must have a previous version of the add-in installed on office 365 Outlook account.

- i) To upgrade to latest version, you need to remove the previously installed add-in and then install the latest add-in.

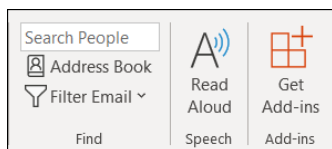
4.2. Removing add-in from Outlook

Follow the instructions below to remove the Connectid Mail add-in from Outlook web or desktop client.

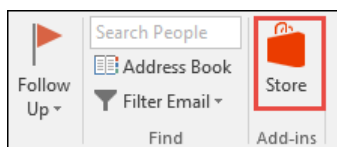
- i) On Outlook web: Login to your office365 account, open the +New message window inside Outlook and choose the Get Add-ins option from more options at the bottom of mail compose area.



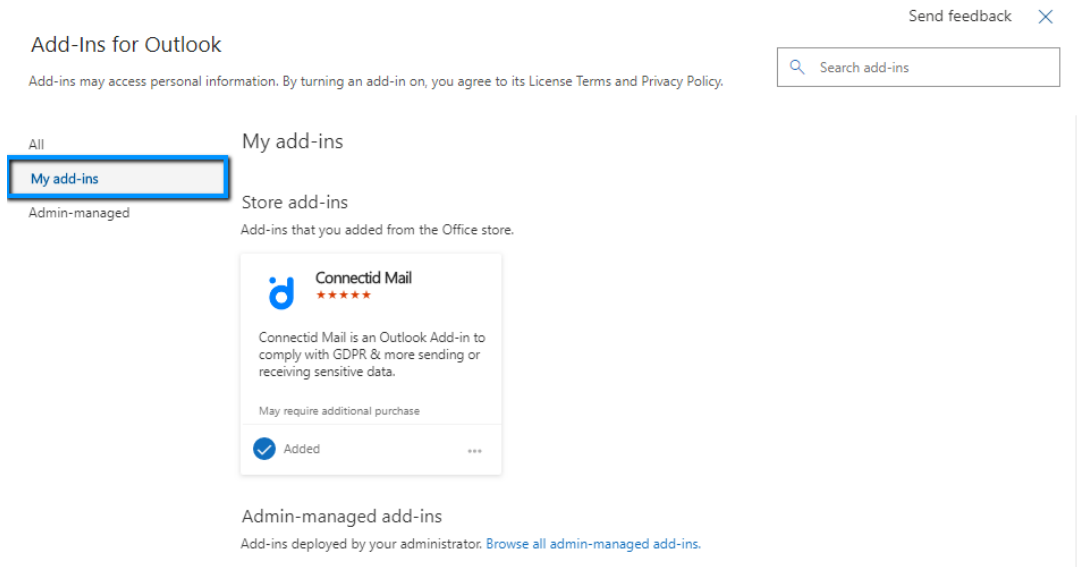
On Windows: Open the Outlook desktop client with the office365 email account configured and click Home > Get Add-ins on the ribbon.



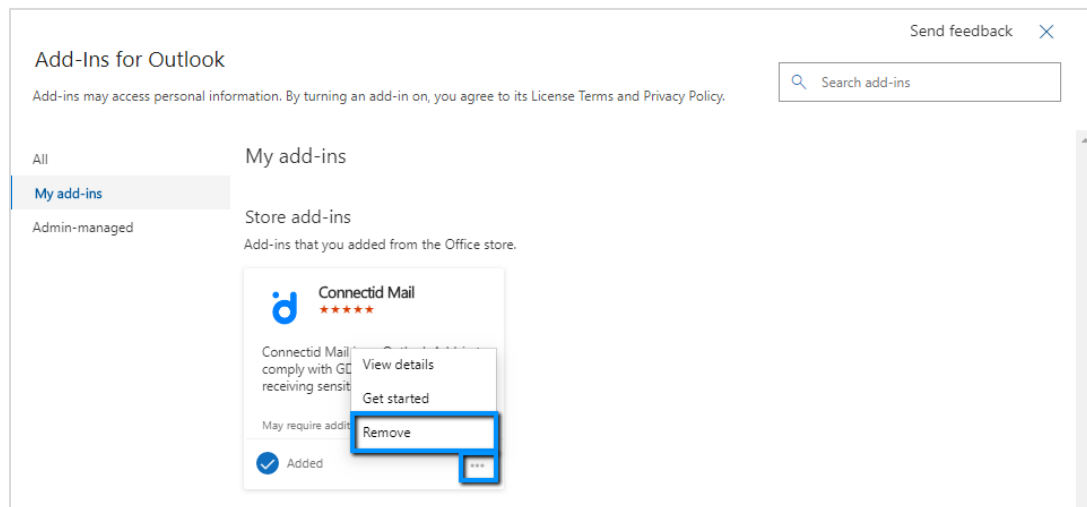
On Mac: Open the Outlook desktop client and click Home > Store on the ribbon.



- ii) On the Add-ins for Outlook page, open the My Add-ins tab to see all the installed add-ins.



- iii) Click the options icon on the “Connectid Mail” add-in and choose Remove to remove the add-in from your Outlook.



- iv) The add-in will be removed from the Outlook and won't be accessible.

4.3. Installing the latest version of the add-in

After removing the previous version of the Connectid Add-in, please follow the steps mentioned on section 1.2 or 2.2 to install the latest version of the add-in from Office Store.

5. Install as Tenant Admin (for all users in a Tenant) from the Office Store

5.1. Prerequisite

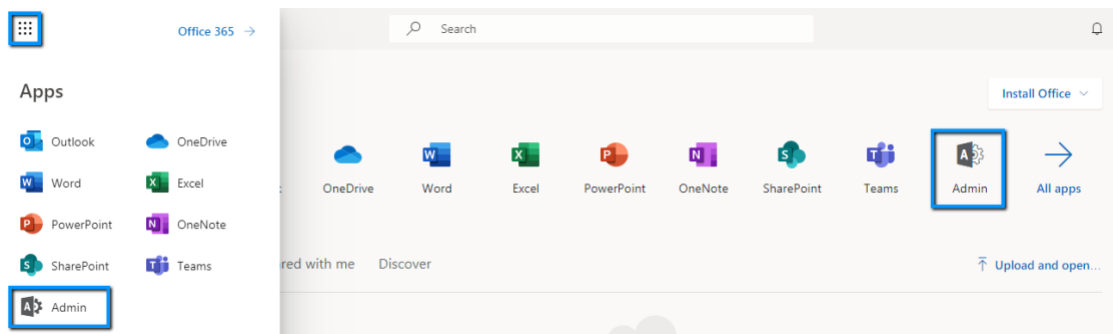
To install Connectid Mail in a Tenant to be accessed by all users, you need to have Office365 administrator role for the Office365 Tenant where you want to install the add-in.

- i) Go to <https://www.office.com/>
- ii) Login with your Office 365 email address and password (Office 365 admin account)

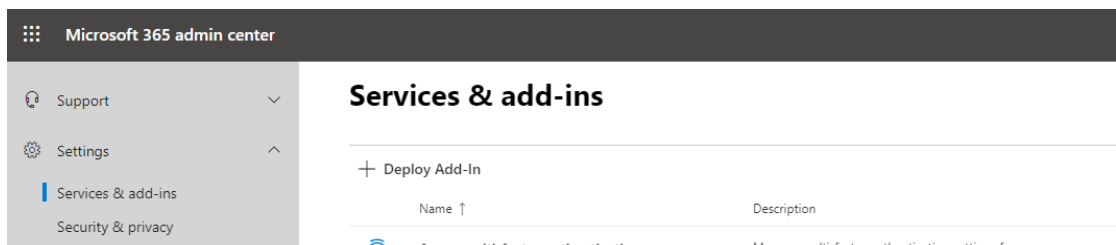
5.2. Installation

Follow the instructions below to install the Connectid Mail add-in as a Tenant admin to be added to the Outlook of all users in the Tenant.

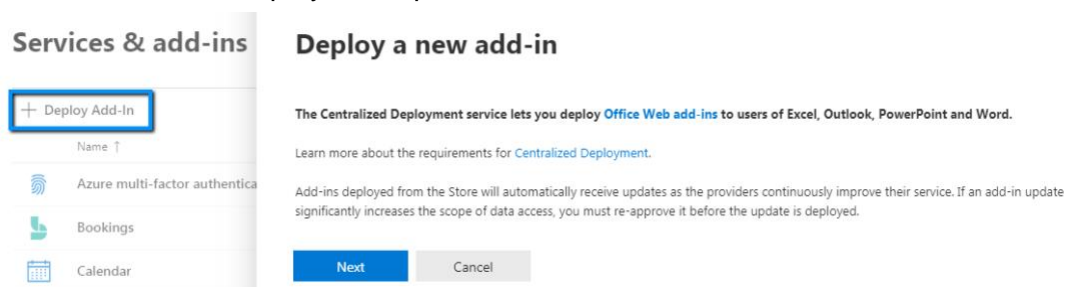
- i) Log-in to your Office365 account and go to Office 365 administration center using the Admin link on the Office Home page or the app list.



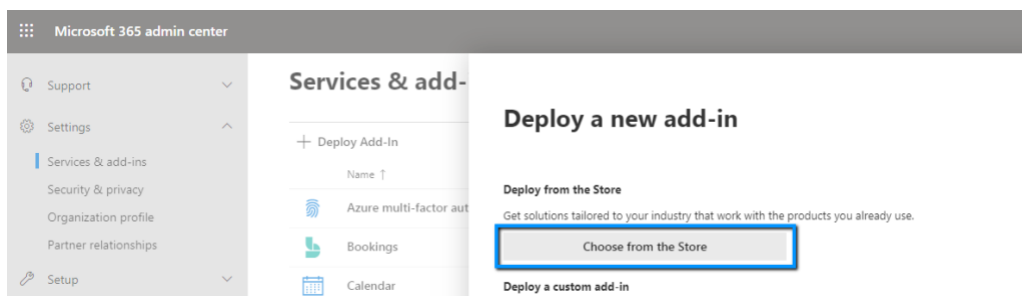
- ii) From inside the Microsoft 365 admin center, open the Services & add-ins section by clicking on Settings > Services & add-ins from the left navigation panel.



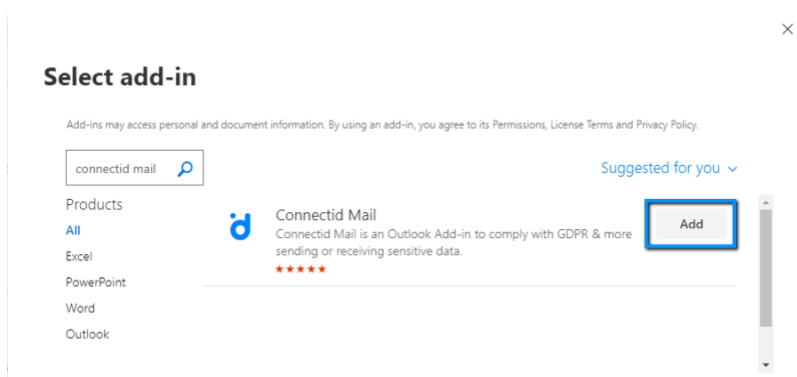
- iii) Click on the +Deploy Add-in link that opens the Centralized Deployment page, then click Next to find the deployment options.



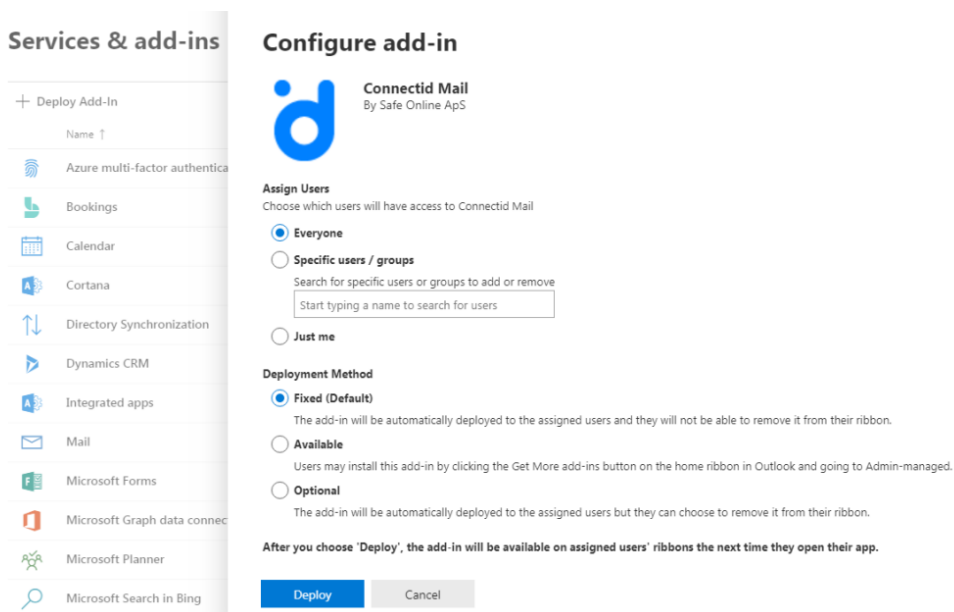
- iv) From the deployment options, click on the Choose from the Store button to install add-in from Office Store.



- v) On the Select add-in page, search for the add-in by using the Search box and click on the Add button on the add-in from the results.



- vi) On the Configure add-in page, select Everyone, Specific users/groups or Just me to specify who the add-in is deployed to. Use the Search box to find the users or groups who you want to deploy the add-in to. After that click on the Deploy button to finish installing the add-in for the selected Tenant.



Considerations when assigning an add-in to users and groups
Admins can assign an add-in to everyone or to specific users and groups. Each option has implications:

- **Everyone:** As the name implies, this option assigns the add-in to every user in the tenant. Use this option sparingly and only for add-ins that are truly universal to your organization.
- **Users:** If you assign an add-in to an individual user, then to deploy the add-in to a new user, you will need to first add that user. The same goes for removing users.
- **Groups:** If you assign an add-in to a group, users who are added to the group will automatically be assigned the add-in. And, when a user is removed from a group, the user loses access to the add-in. In either case, no additional action is required from you as the admin.
- **Just me:** If you assign an add-in to just yourself, this assigns the add-in to only your account. This is ideal if you wish to test out the add-in first.

The option that is right for your organization depends on your configuration. However, Microsoft recommend making assignments via groups. As an admin, you might find it easier to manage add-ins using groups and control the membership of those groups rather than having to change the users assigned each time. On the other hand, in some situations, you may want to restrict access to a very small set of users and therefore make assignments to specific users. As a result, you will need to manage the assigned users manually.

- i) A green tick will appear with a success message when the add-in has been deployed. You can follow the on-page instructions to test that the add-in has deployed successfully.

Note: Users may need to relaunch Office to see the add-in icon appear on the ribbon of app. Outlook add-ins can take up to 12 hours to appear on users' ribbons.

Services & Add-ins

- + Deploy Add-In
- Name ↑
- Azure multi-factor authentication
- Bookings
- Calendar
- Connectid Mail
- Cortana
- Directory Synchronization
- Dynamics CRM
- Integrated

Deploy Connectid Mail

Your add-in has been deployed.

You will receive an email notification confirming your successful deployment.
It will take up to 12 hours for the add-in to be displayed on users' ribbons - users might need to relaunch Office.

Get started with the add-in

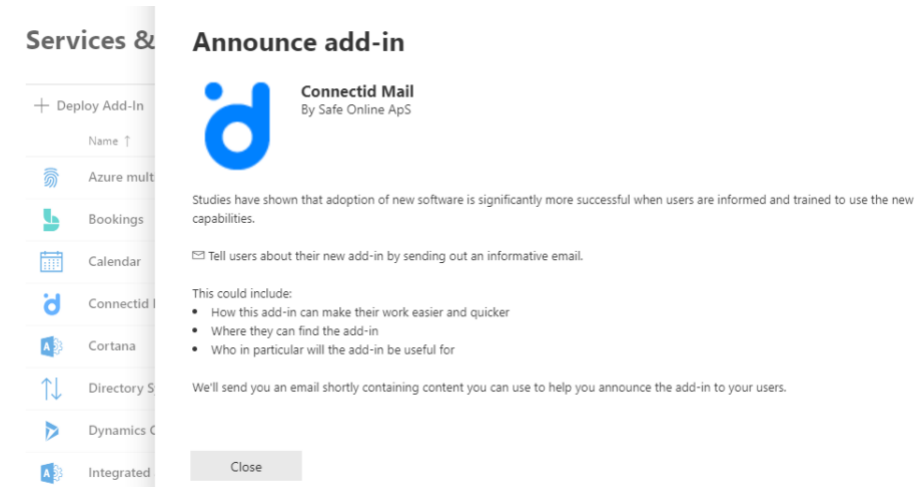
Once deployment completes, to test that it is successful, launch the applicable Office app to confirm that the add-in is present on the ribbon.

You can force the list of installed add-ins to refresh by launching the Office app and navigating to the Insert tab > My Add-ins > Admin Managed.

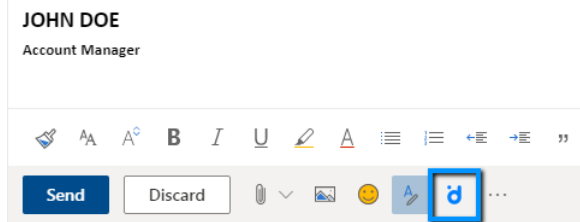
Outlook add-ins can take up to 12 hours after deployment to become available.

Next
Close

- ii) When finished, select Next. If you've deployed to just yourself, you can select Change who has access to add-in in order to deploy to more users. Otherwise, click on the Close button on the Announce add-in page to complete the installation.



- vii) The Connectid Mail add-in can be found at the bottom of the mail compose area on targeted users Outlook under the tenant, ready for use. When using, if you're prompted to sign in, type the email address and password you use to sign into Office programs.



6. Install Connectid Mail on Outlook web from Manifest file

6.1. Prerequisite

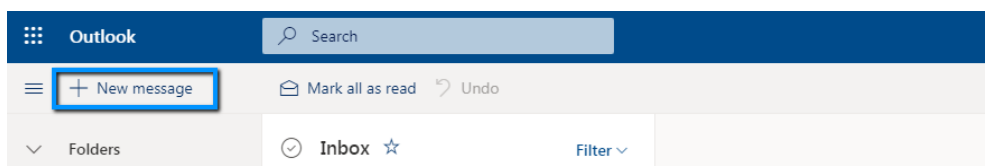
To install Connectid Mail you will need an office 365 account with valid inbox license.

- Go to <https://outlook.office.com/owa/>
- Login with your Office 365 email address and password

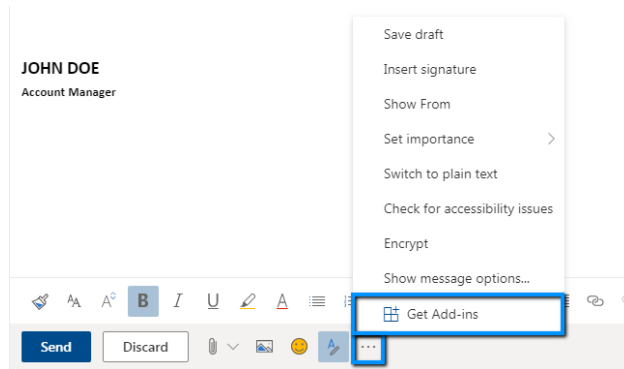
6.2. Installation

Follow the instructions below to install the Connectid Mail add-in on Outlook using app file.

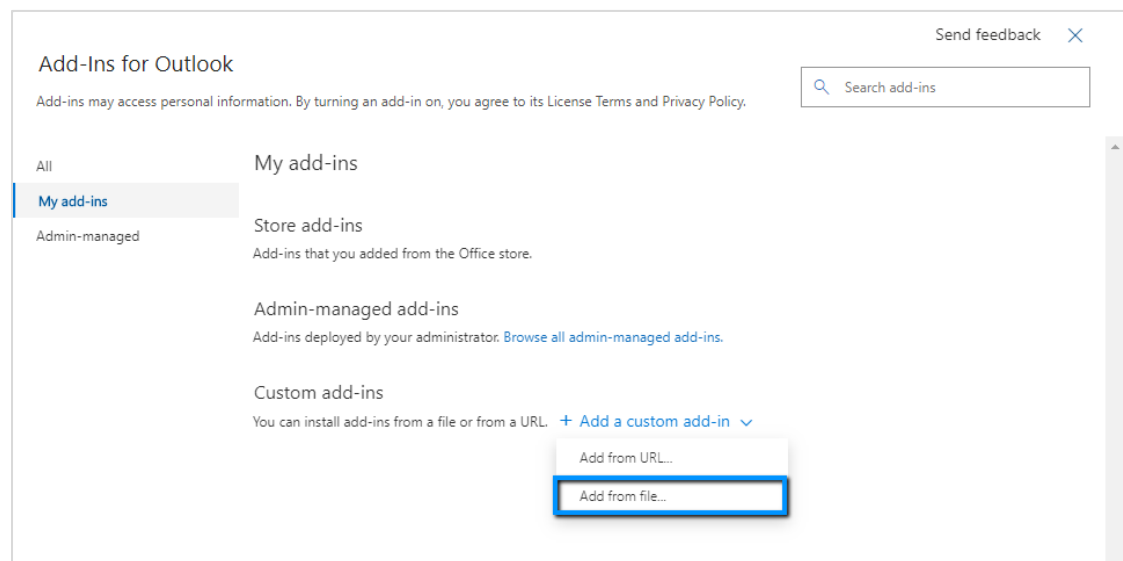
- Login to your office365 account and open the +New message window inside Outlook.



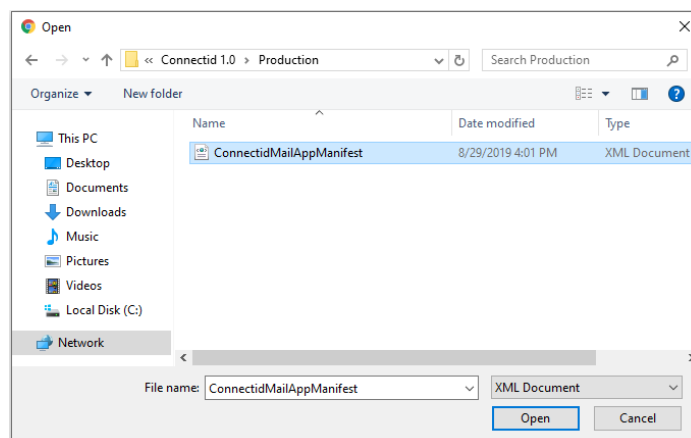
- Click on the more options icon at the bottom tool bar, mail sending area and choose the Get Add-ins option.



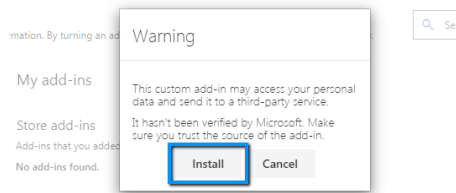
- iii) On the Add-ins for Outlook page, open the My Add-ins tab and choose Add from file... option from the +Add a custom add-in link.



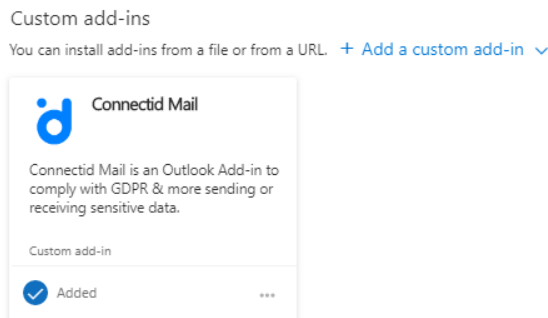
- iv) Browse and select the xml file for the add-in from the local computer and click on the Open button.



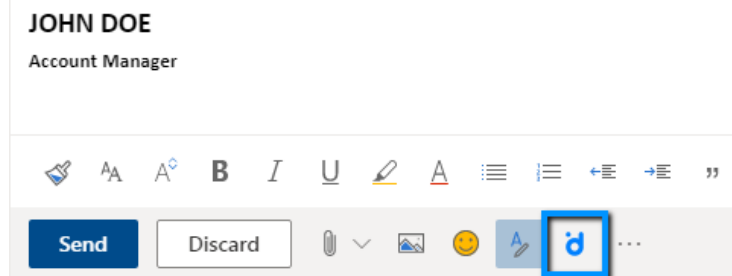
- v) Read the consent for installing add-in from file and click on the Install button to proceed installation.



- vi) The installed add-in will show up under the Custom Add-ins section with an added sign. Close the popup window after the installation finishes.



- vii) The Connectid Mail add-in can then be found at the bottom of the mail compose area ready for use. When using, if you're prompted to sign in, type the email address and password you use to sign in to Office programs.



7. Install Connectid Mail on Outlook desktop from Manifest file

7.1. Prerequisite

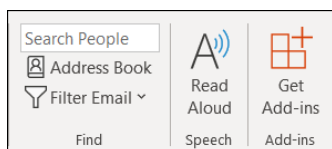
To install Connectid Mail you will need an office 365 account and that email should be configured in the Outlook desktop client.

- Install Outlook desktop client 2013 (with update) or upper if not installed already.
- Add the office365 email account on Outlook desktop client to which the add-in will be added.

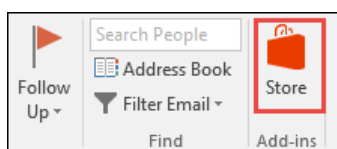
7.2. Installation on Outlook desktop client

Follow the instructions below to install the Connectid Mail add-in on Outlook desktop client using app file.

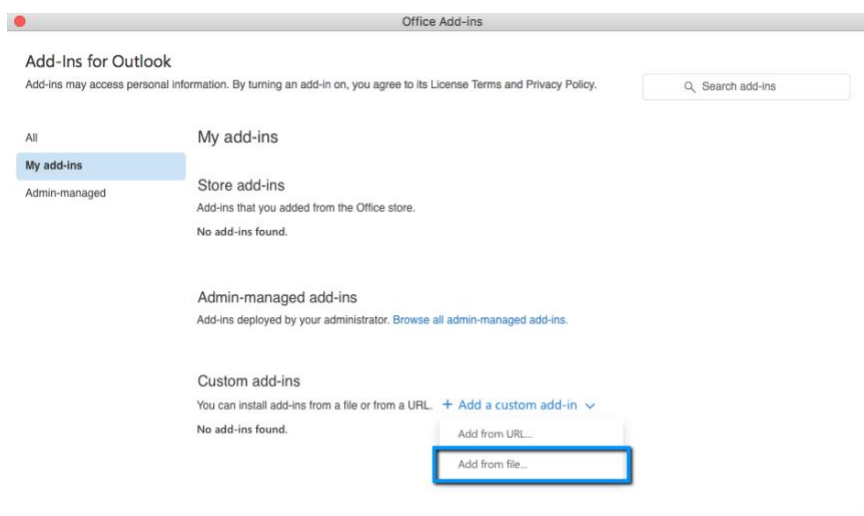
- i) On Windows: Open the Outlook desktop client with the office365 email account configured and click Home > Get Add-ins on the ribbon.



On Mac: Open the Outlook desktop client and click Home > Store on the ribbon.



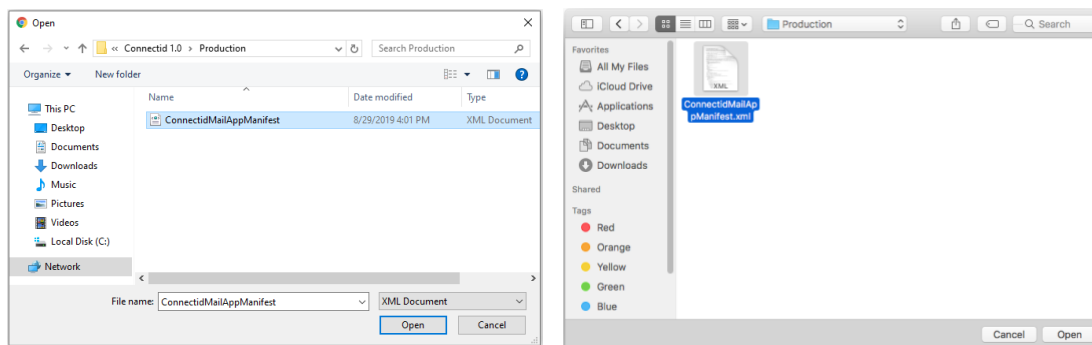
- ii) On the Add-ins for Outlook page, open the My Add-ins tab and choose Add from file... option from the +Add a custom add-in link.



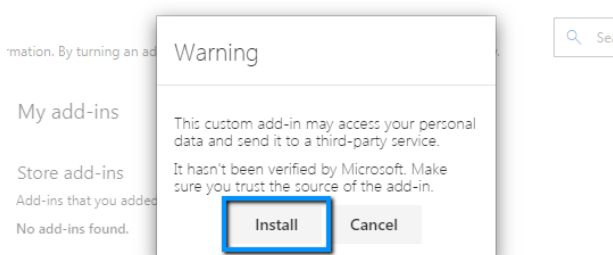
- iii) Browse and select the xml file for the add-in from the local computer and click on the Open button.

Windows

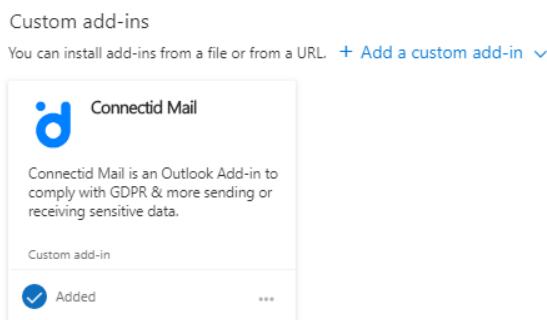
Mac



- iv) Read the consent for installing add-in from file and click on the Install button to proceed installation.

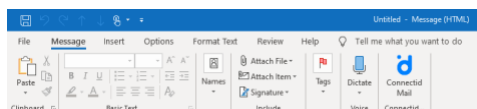


- v) Close the popup window after the installation finishes. The installed add-in will show up under the Custom Add-ins section with an added sign.

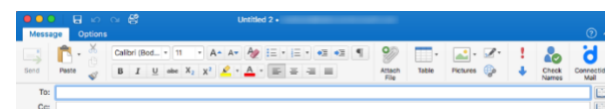


- vi) The Connectid Mail add-in can then be found at the bottom of the mail compose area ready for use. When using, if you're prompted to sign in, type the email address and password you use to sign in to Office programs.

Windows



Mac



8. Install as Tenant Admin (for all users in a Tenant) from Manifest File

8.1. Prerequisite

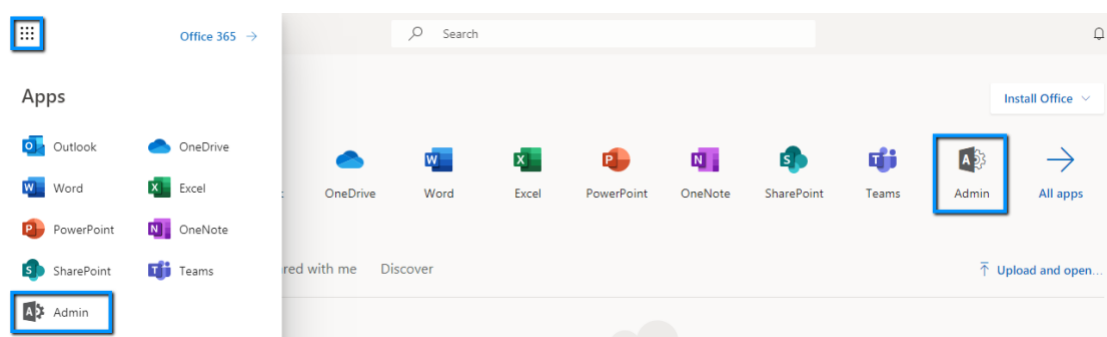
To install Connectid Mail in a Tenant to be accessed by all users, you need to have Office365 administrator role for the Office365 Tenant where you want to install the add-in.

- i) Go to <https://www.office.com/>
- ii) Login with your Office 365 email address and password (Office 365 admin account)

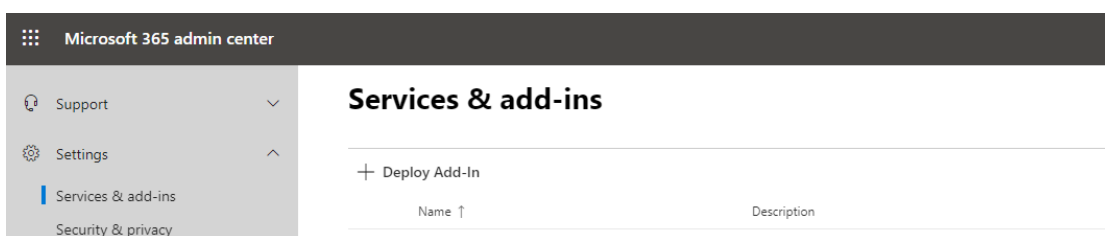
8.2. Installation

Follow the instructions below to install the Connectid Mail add-in as a Tenant admin to be added to the Outlook of all users in the Tenant.

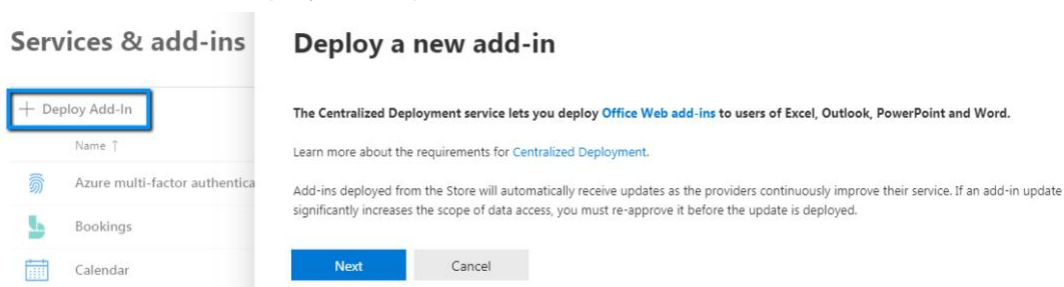
- i) Log-in to your Office365 account and go to Office 365 administration center using the Admin link on the Office Home page or the app list.



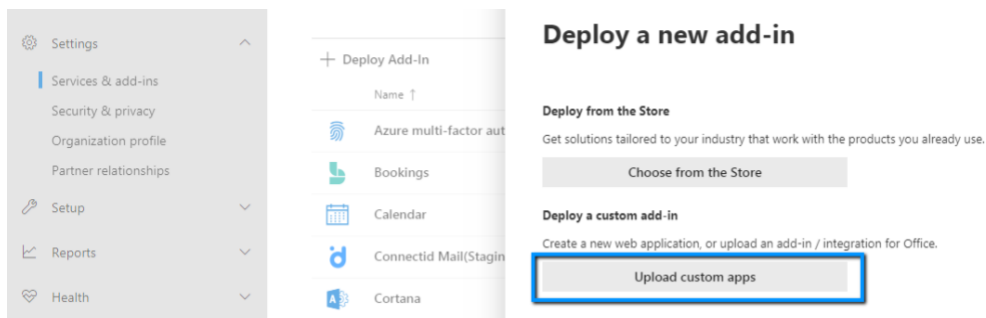
- ii) From inside the Microsoft 365 admin center, open the Services & add-ins section by clicking on Settings > Services & add-ins from the left navigation panel.



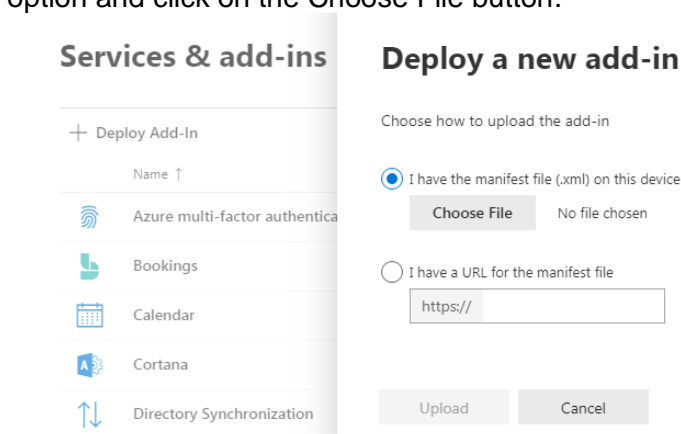
- iii) Click on the +Deploy Add-in link that opens the Centralized Deployment page, then click Next to find the deployment options.



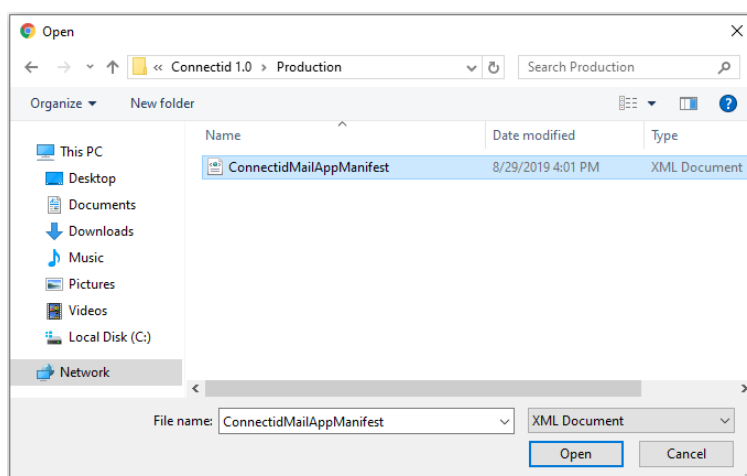
- iv) From the deployment options, click on the Upload custom apps button to install add-in from xml app file.



- v) On the Deploy a new add-in page, choose I have the manifest file (.xml) on this device. option and click on the Choose File button.



- vi) Then browse and select the .xml manifest file for the add-in from the local computer and click on the Open button.



- vii) After selecting the manifest file, click on the Upload button to proceed with the installation.

Services & add-ins

+ Deploy Add-In
Name ↑

Azure multi-factor authentication

Bookings

Calendar

Cortana

Directory Synchronization

Deploy a new add-in

Choose how to upload the add-in

☒ I have the manifest file (.xml) on this device

☐ I have a URL for the manifest file

ConnectidMailAppManifest.xml

- viii) On the Configure add-in page, select Everyone, Specific users/groups or Just me to specify who the add-in is deployed to. Use the Search box to find the users or groups who you want to deploy the add-in to. After that click on the Deploy button to finish installing the add-in for the selected Tenant.

Services & add-ins

+ Deploy Add-In
Name ↑

Azure multi-factor authentication

Bookings

Calendar

Cortana

Directory Synchronization

Dynamics CRM

Integrated apps

Mail

Microsoft Forms

Microsoft Graph data connector

Microsoft Planner

Microsoft Search in Bing

Configure add-in

Connectid Mail
By Safe Online ApS

Assign Users

Choose which users will have access to Connectid Mail

☒ **Everyone**

☐ **Specific users / groups**

Search for specific users or groups to add or remove

☐ **Just me**

Deployment Method

☒ **Fixed (Default)**

The add-in will be automatically deployed to the assigned users and they will not be able to remove it from their ribbon.

☐ **Available**

Users may install this add-in by clicking the Get More add-ins button on the home ribbon in Outlook and going to Admin-managed.

☐ **Optional**

The add-in will be automatically deployed to the assigned users but they can choose to remove it from their ribbon.

After you choose 'Deploy', the add-in will be available on assigned users' ribbons the next time they open their app.

Considerations when assigning an add-in to users and groups

Admins can assign an add-in to everyone or to specific users and groups. Each option has implications:

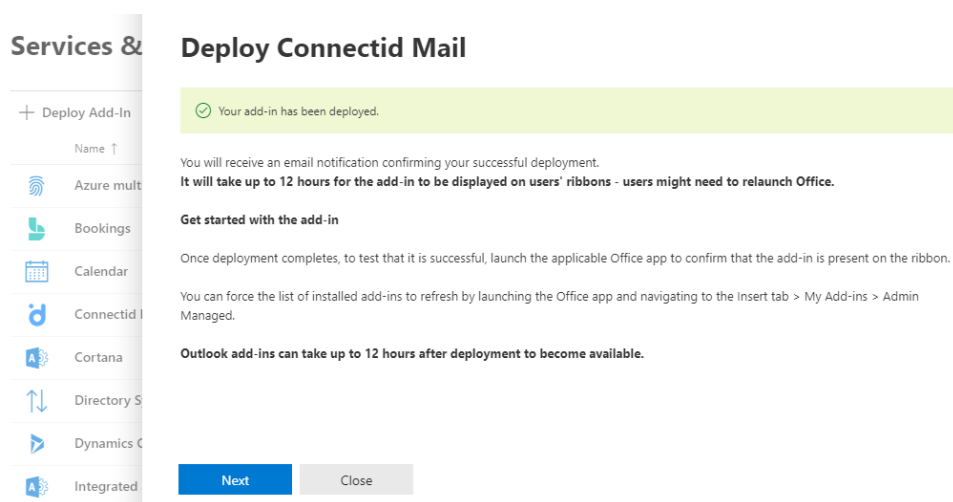
- **Everyone:** As the name implies, this option assigns the add-in to every user in the tenant. Use this option sparingly and only for add-ins that are truly universal to your organization.
- **Users:** If you assign an add-in to an individual user, then to deploy the add-in to a new user, you will need to first add that user. The same goes for removing users.

- **Groups:** If you assign an add-in to a group, users who are added to the group will automatically be assigned the add-in. And, when a user is removed from a group, the user loses access to the add-in. In either case, no additional action is required from you as the admin.
- **Just me:** If you assign an add-in to just yourself, this assigns the add-in to only your account. This is ideal if you wish to test out the add-in first.

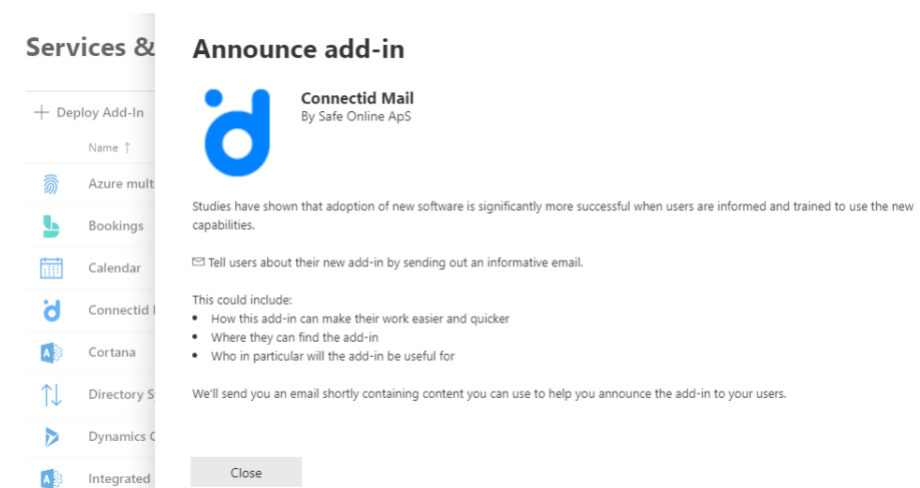
The option that is right for your organization depends on your configuration. However, Microsoft recommend making assignments via groups. As an admin, you might find it easier to manage add-ins using groups and control the membership of those groups rather than having to change the users assigned each time. On the other hand, in some situations, you may want to restrict access to a very small set of users and therefore make assignments to specific users. As a result, you will need to manage the assigned users manually

- ix) A green tick will appear with a success message when the add-in has been deployed. You can follow the on-page instructions to test that the add-in has deployed successfully.

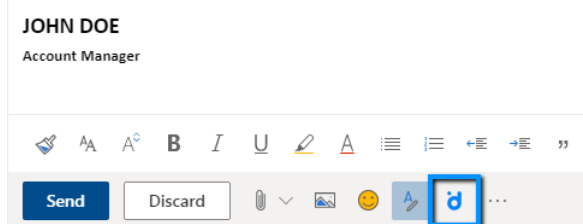
Note: Users may need to relaunch Office to see the add-in icon appear on the ribbon of app. Outlook add-ins can take up to 12 hours to appear on users' ribbons.



- x) When finished, select Next. If you've deployed to just yourself, you can select Change who has access to add-in in order to deploy to more users. Otherwise, click on the Close button on the Announce add-in page to complete the installation.



viii) The Connectid Mail add-in can be found at the bottom of the mail compose area on targeted users Outlook under the tenant, ready for use. When using, if you're prompted to sign in, type the email address and password you use to sign in to Office programs.



9. Enable/Disable add-in as Tenant Admin (for all users in a Tenant)

9.1. Prerequisite

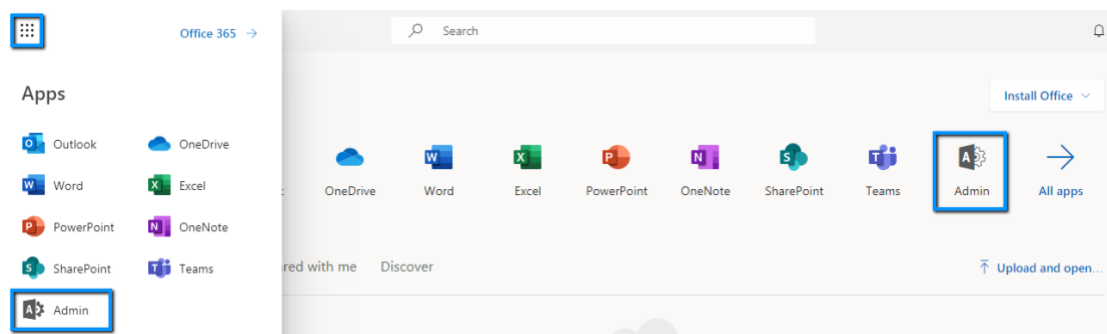
To enable/disable or remove Connectid Mail from a Tenant for all users, you need to have Office365 administrator role for the Office365 Tenant where you want to manage the add-in.

- Go to <https://www.office.com/>
- Login with your Office 365 email address and password (Office 365 admin account)

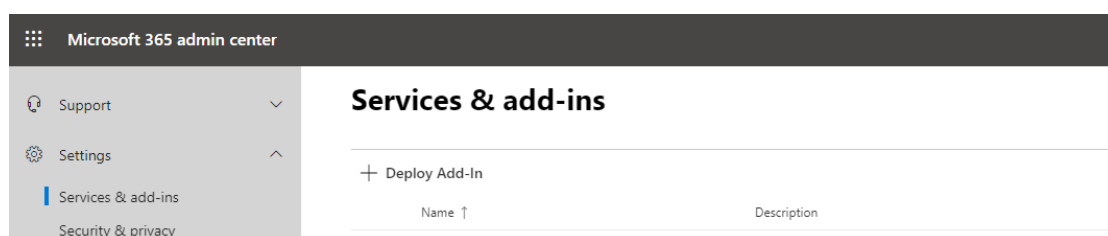
9.2. Enable/Disable add-in installed for Tenant users

Follow the instructions below to enable/disable or remove the Connectid Mail add-in from the Outlook of all users in a Tenant.

- Log-in to your Office365 account and go to Office 365 administration center using the Admin link on the Office Home page or the app list.



- ii) From inside the Microsoft 365 admin center, open the Services & add-ins section by clicking on Settings > Services & add-ins from the left navigation panel.



- iii) Select the Connectid Mail add-in from the Services and add-ins list.

Services & add-ins


+ Deploy Add-In		
Name	Description	Host Apps
Azure multi-factor authentication	Manage multi-factor authentication settings for your users.	
Bookings	Choose whether to allow Microsoft Bookings, and whether Bookings can process payments from you	
Calendar	Allow users to share their calendars with people outside of your organization.	
Connectid Mail	Connectid Mail is an Outlook Add-in to comply with GDPR & more sending or receiving sensitive da	Outlook
Cortana	Turn Cortana access on or off for your entire organization.	


- iv) You can switch the add-in status off to make it disable, change users, the deployment methods, or even remove the add-in from the Edit Connectid Mail page.


Services & add-ins


+ Deploy Add-In


Name ↑


 Azure multi-factor authentication


 Bookings


 Calendar


 Connectid Mail


 Cortana


 Directory Synchronization


 Dynamics CRM


 Integrated apps


 Mail

 Microsoft Forms


 Microsoft Graph data connect

 Microsoft Planner

 Microsoft Search in Bing

 Microsoft Teams

Edit Connectid Mail



Connectid Mail
Version 2.0.0.0
Host Apps: Outlook

[Privacy Policy](#)
[Terms of Use](#)
[Get Help](#)

Connectid Mail helps organizations comply with GDPR and more when sending or receiving sensitive data.

Assign Users

Choose which users will have access to Connectid Mail(Staging)

☒ **Everyone**

☐ **Specific users / groups**

Search for specific users or groups to add or remove

Start typing a name to search for users

Deployment Method

☒ **Fixed (Default)**

The add-in will be automatically deployed to the assigned users and they will not be able to remove it from their ribbon.

☐ **Available**

Users may install this add-in by clicking the Get More add-ins button on the home ribbon in Outlook and going to Admin-managed.

☐ **Optional**

The add-in will be automatically deployed to the assigned users but they can choose to remove it from their ribbon.

Status

☒ On

Save

Cancel

Update add-in

Remove add-in

- v) After changing the settings for the add-in, click on the Save button to apply the changes for all the targeted users of the selected tenant.