

# SendToQuickBase™ Outlook Add-In

## Enterprise Deployment Guide



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Minimum SendToQuickBase product required is SendToQuickBase 3 (version 3.8.393 or higher)

Manual Edition: November 16, 2023

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## Audience and Purpose

This guide is intended for IT professionals who wish to either control the installation of SendToQuickBase on the desktop and/or wish to customize the initial SendToQuickBase Options set upon installation.

Like most Windows software products, SendToQuickBase can be installed by anyone directly onto the computer they own. However, some organizations prefer to have their IT department control the installation of software. This guide describes how to do just that.

*Note: An understanding of deploying and customizing Microsoft MSI installers is required to follow the instructions in this guide. In this guide, Orca is described as one method of how to customize the SendToQuickBase MSI installer. Orca is a free tool provided by Microsoft and not supported by Microsoft or SoftTechExperts, LLC. Feel free to use any tool you wish.*

## SendToQuickBase Overview

Before getting into the deployment and customization instructions, first here is an overview of SendToQuickBase. SendToQuickBase allows you to save your emails, contacts, calendar, tasks and more from Microsoft Outlook into any Quickbase Application. There is a one-time setup to define one or more "mappings" using a Wizard to define where your Outlook data is stored into Quickbase.

SendToQuickBase is comprised of two components:

- SendToQuickBase Admin
- SendToQuickBase Outlook Add-In

The Admin program is a standard Windows desktop application that is used for the one-time setup to create the "mappings". This program is typically only needed by one, or a few, people for this setup. The main dialog for SendToQuickBase Admin can be seen below.

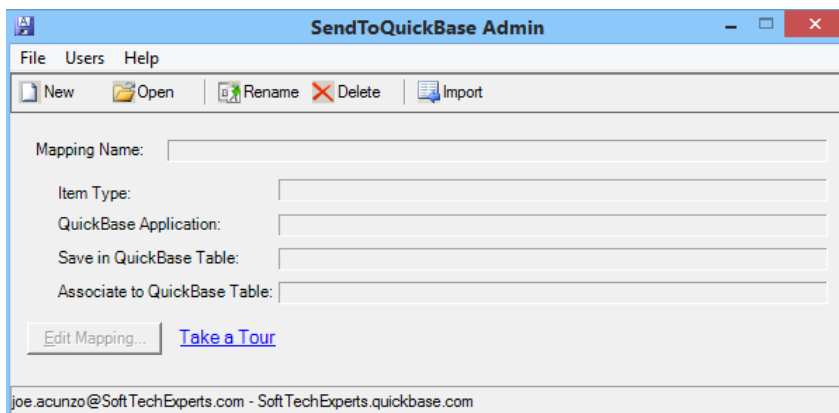


Figure 1 - SendToQuickBase Admin - Main Screen

The SendToQuickBase Outlook Add-In displays a new toolbar in Outlook itself and provides the ability to save the data using the defined mappings. The Add-In is used day-to-day by users to save emails, contacts, calendar, etc. to Quickbase.

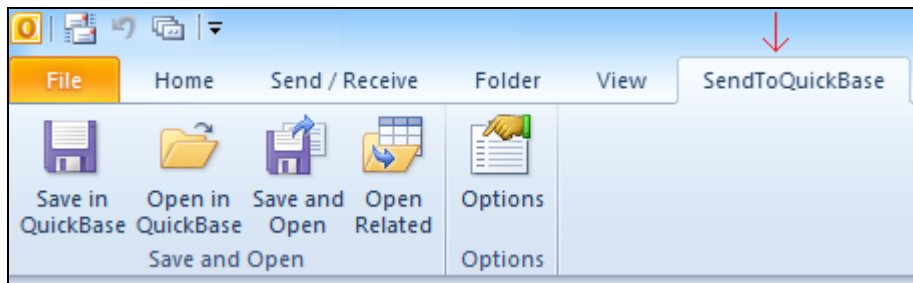


Figure 2 - SendToQuickBase Outlook Toolbar

## Enterprise Deployment Overview

The following steps must be taken to deploy SendToQuickBase Outlook Add-In instead of each user performing their own install:

1. Download the SendToQuickBase setup program.
2. Run an Administrative Setup to extract the necessary file(s) for deployment.
3. Optionally customize the setup using a standard Microsoft transform (MST).
4. Deploy SendToQuickBase Outlook Add-In.

The Outlook Add-In installer is an MSI that installs just the SendToQuickBase Outlook Add-In. Since it is a standard MSI installer package, various tools can be used, such as LANDesk and others, to deploy the Add-In to numerous users' computers over your network without having to be present at each computer.

Also, since the Add-In installer is a standard MSI, a Microsoft "transform" (MST file) may be created to customize some of the behavior of the setup. (More details on customization may be found later in this document.)

Each of the deployment steps is covered in detail below.

### **Download SendToQuickBase Setup**

The latest SendToQuickBase installer can be found here:

<http://www.softtechexperts.com/sendtoquickbasedownload.html>

The program downloaded is named SetupSendToQuickBaseVn.exe where *n* is the product number (e.g. SetupSendToQuickBaseV5.exe for SendToQuickBase 5).

### **Run Administrative Setup to Extract Files for Deployment**

Running an Administrative Setup extracts the necessary files to deploy just the SendToQuickBase Outlook Add-In (not the SendToQuickBase Admin program, use the regular setup to install that also). Use the following command line to run an Administrative Setup:

```
SetupSendToQuickBaseVn.exe -a
```

Where *n* is the product number (e.g. SetupSendToQuickBaseV5.exe for SendToQuickBase 5).

*Note:* You must have SendToQuickBase 3 (version 3.8.393) or newer of SendToQuickBase to perform an administrative setup.

Using the -a command line switch results in the dialog shown below.

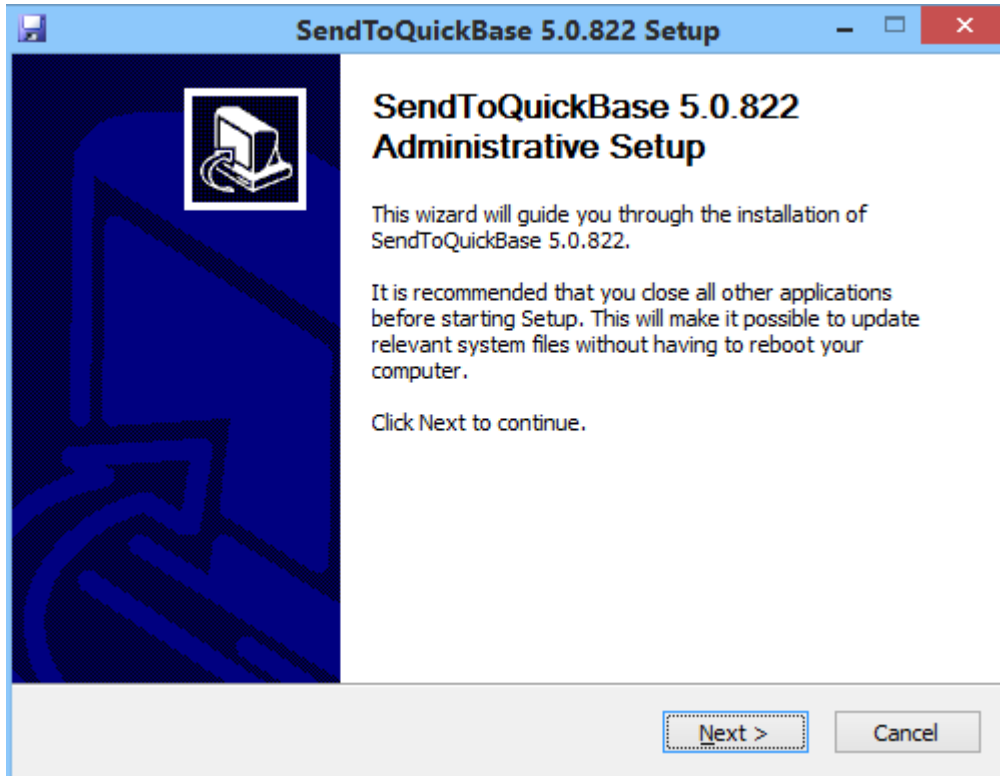


Figure 3 - Administrative Setup Initial Dialog

When prompted by the installer, be sure to select an existing folder to save into. After completed, the following file will be available.

*Note:* The file size and date/time will vary based on the version of SendToQuickBase.

Name	Date modified	Type	Size
SendToQuickBaseAddinSetup.msi	5/21/2015 10:06 AM	Windows Installer Package	13,984 KB

Figure 4 - Administrative Setup - File Extracted

## **Customizing the Setup Using an MST (Optional)**

Since SendToQuickBase Add-In installer is a standard Windows Installer-based package, it may be customized using a transform (MST file). There are various customizations you may perform on the SendToQuickBase Add-In MSI, all of which are optional:

- Set your organizations License Key
- Suppress the Registration dialog
- Set your Quickbase Account (a.k.a. Quickbase Host)
- Set other user-level options

By providing your organizations SendToQuickBase License Key, the user does not have to enter the key. You can also suppress the display of the Registration screen entirely, as long as the key is provided.

## **Info Concerning SendToQuickBase License Keys**

The first person in your organization to install and register SendToQuickBase using the full installer registers as the SendToQuickBase "Administrator" and a License Key is assigned. This License Key can be viewed by opening SendToQuickBase Admin program, and on the User menu, select View.

*Note: The same SendToQuickBase License Key is used for everyone in your organization.*

A certain number of people may register using your License Key by entering their Quickbase login (email or screen name, and password) and the License Key. The number allowed to register is limited by the number of users you purchased for your License. Additional users may be purchased for your License at any time.

## **Customizing the Add-In Install**

Many commercial and free tools are available to generate a transform used to customize an MSI. Orca is a free, general-use tool available from Microsoft for editing tables in MSI files and generating a transform (MST file) from those changes. The resulting transform can then be applied to the SendToQuickBase installer to include any site-specific customizations. For more information and to download Orca, visit <http://msdn.microsoft.com/en-us/library/aa370557%28VS.85%29.aspx>.

To use Orca to customize the setup of SendToQuickBase Add-In install, follow the steps below.

*Note: While the procedure described below uses Orca, any tool that can generate an MST file may be used.*

1. Start Orca and from the File menu, choose Open. Browse to the SendToQuickBaseAddinSetup.msi MSI file and open it.
  2. After opening the file, the table editor is displayed.
  3. From the Transform menu, choose New Transform to start creating a transform.
-

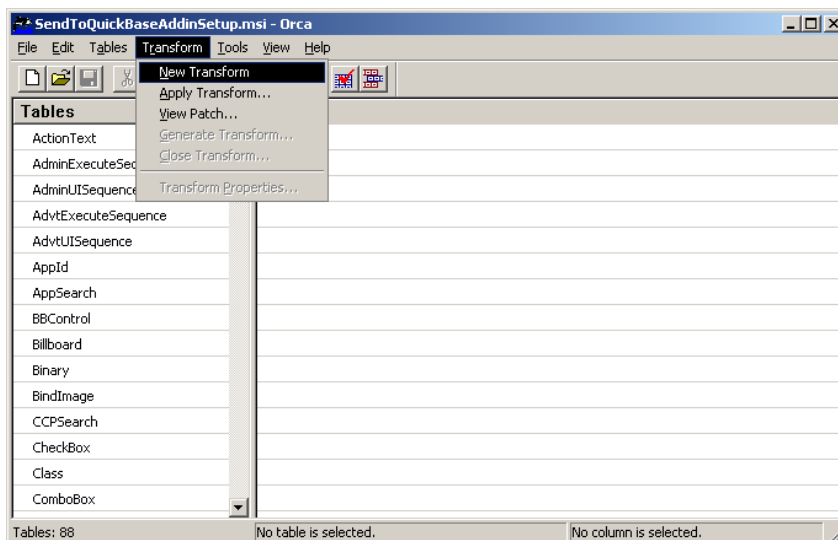


Figure 5 - Orca New Transform

4. Select the Registry Table from the list on the left. There are two Registry values you can edit that effect the setup of SendToQuickBase. Their names are ShowRegistrationDialog and LicenseKey.

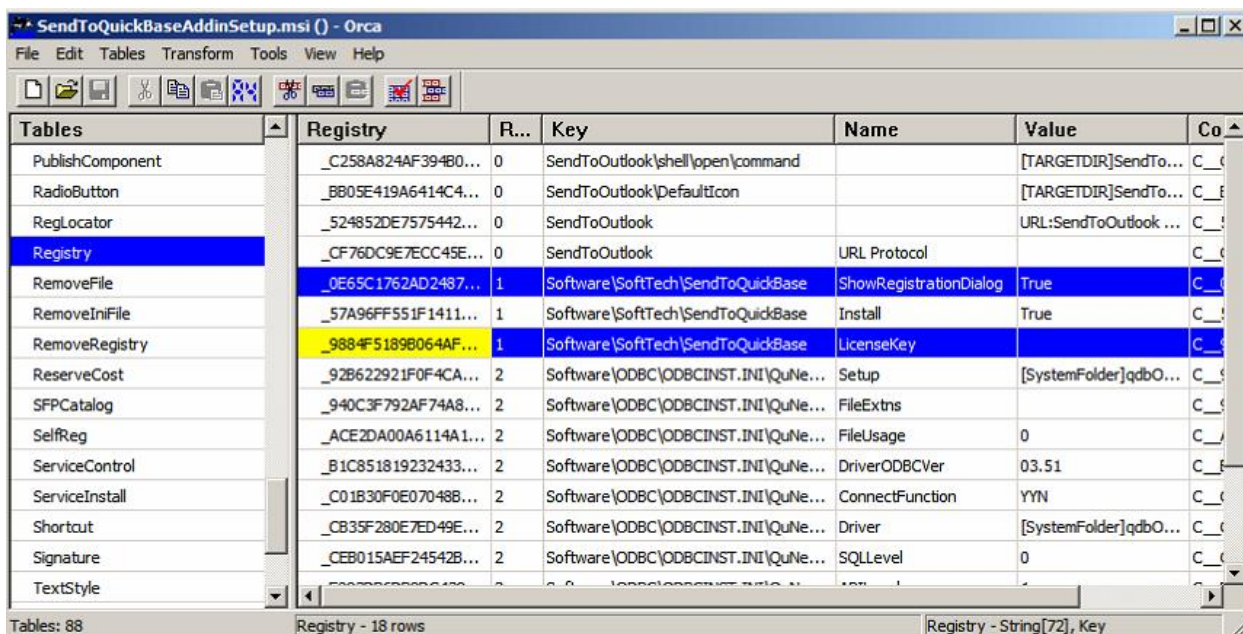


Figure 6 - Orca Customize

Key Name	Value
ShowRegistrationDialog	True or False
LicenseKey	Your key in the form KKKK-KKKK-KKKK-KKKK
QBHost (new String Value)	https:// <i>YourCompany</i> .quickbase.com

While QBHost is optional, it is highly recommended you add this new String Value to the Registry section of the MST so your users need not enter it on the SendToQuickBase

logon dialog. Set QBHost to the URL of your Quickbase Account URL, such as *https://Acme.QuickBase.com*. This is the URL used to log into Quickbase using your browser. For instructions on how to add this new value, and many other user options, refer to Appendix A.

- When all customizations are complete, generate the transform. To do this, from the Transform menu, choose Generate Transform. Choose an appropriate name for the transform and save it in the same location as the SendToQuickBaseAddinSetup.msi file.

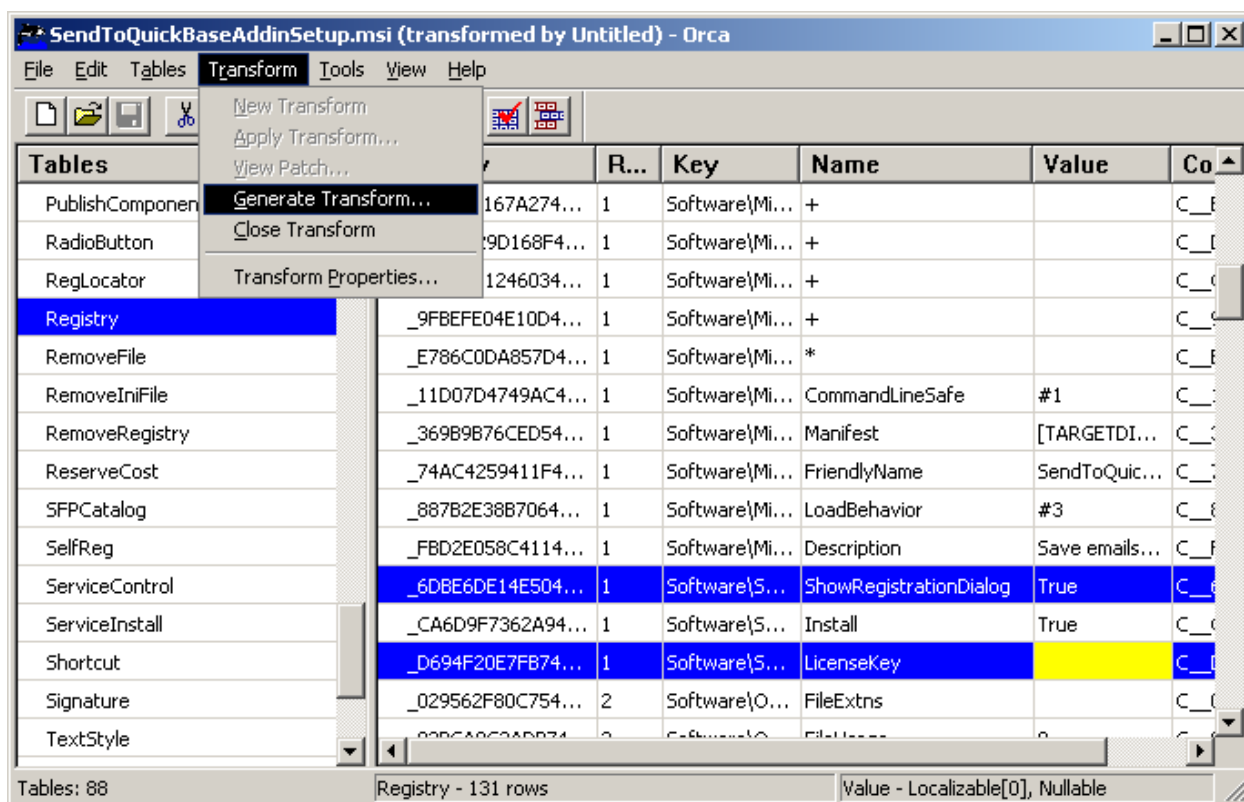


Figure 7 - Orca Generate Transform

That completes the steps to generate the MST transform file.

## Testing Your MST File

Now you may test your customization by using the Microsoft MSI installer program with the command line:

```
msiexec /i X:\MyPath\SendToQuickBaseAddinSetup.msi TRANSFORMS="MyTransform.mst"
```

Where X:\MyPath is the path to the MSI file and MyTransform.mst is the file saved from Orca.



## Deploy SendToQuickBase Outlook Add-In

SendToQuickBase Add-In setup is a standard MSI file named SendToQuickBaseAddinSetup.msi. If run manually, the dialog below is displayed. Deploy this file using whatever tools you normally use.

*Note: A user must be logged into Windows before SendToQuickBaseAddinSetup.msi can be run, and Windows Administrative access is needed.*

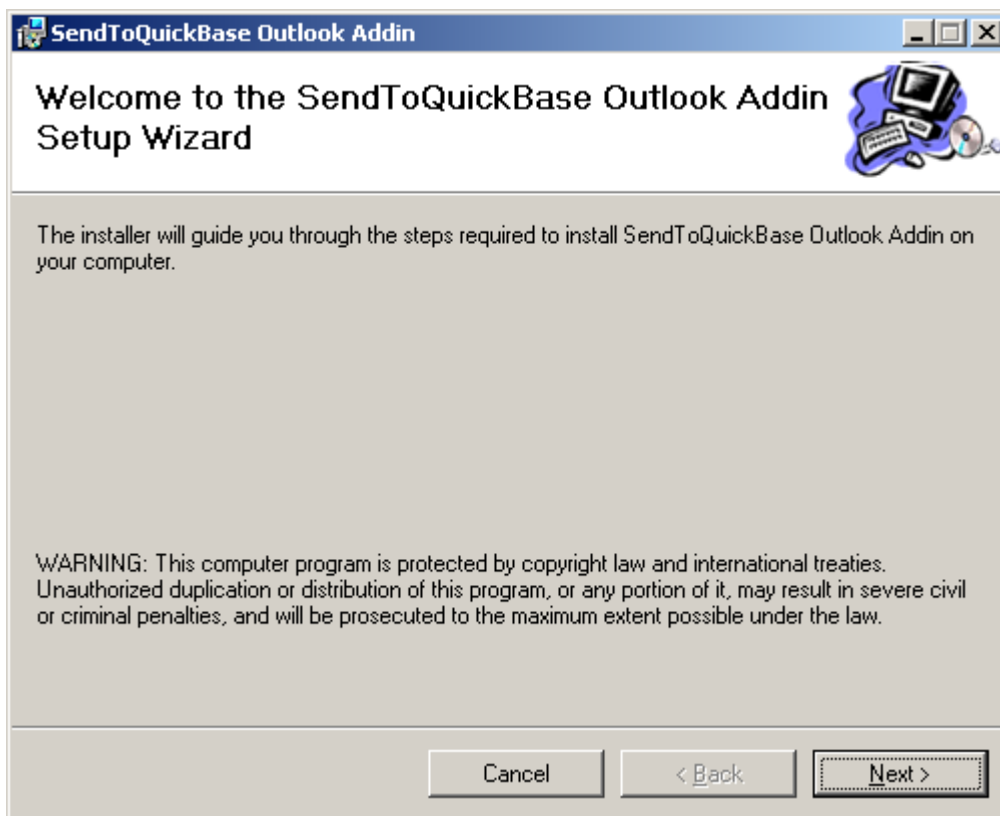


Figure 8 - Outlook Add-In MSI Installer Initial Dialog

### Add-In Installer Prerequisites

The Add-In MSI package has the following prerequisite, that is, these Microsoft components must already be installed on the computer before the SendToQuickBase Add-In is installed and will run properly.

- Windows Installer 3.1 (or higher)
- Microsoft .NET Framework 4.7.2 (or higher)

## SendToQuickBase User Dialogs and Effect of Customizing

The following sequence of dialogs is displayed after the user opens Outlook the first time after SendToQuickBase has been installed.

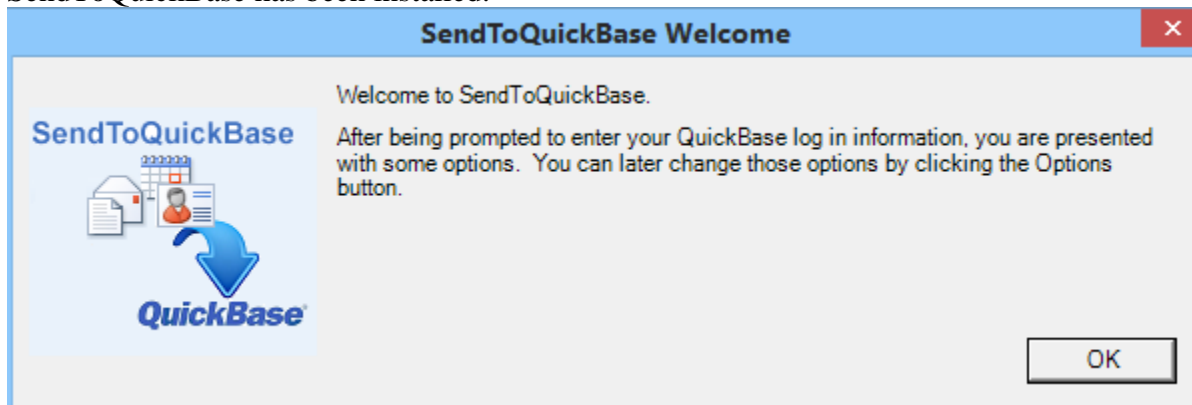


Figure 9 - Welcome Screen

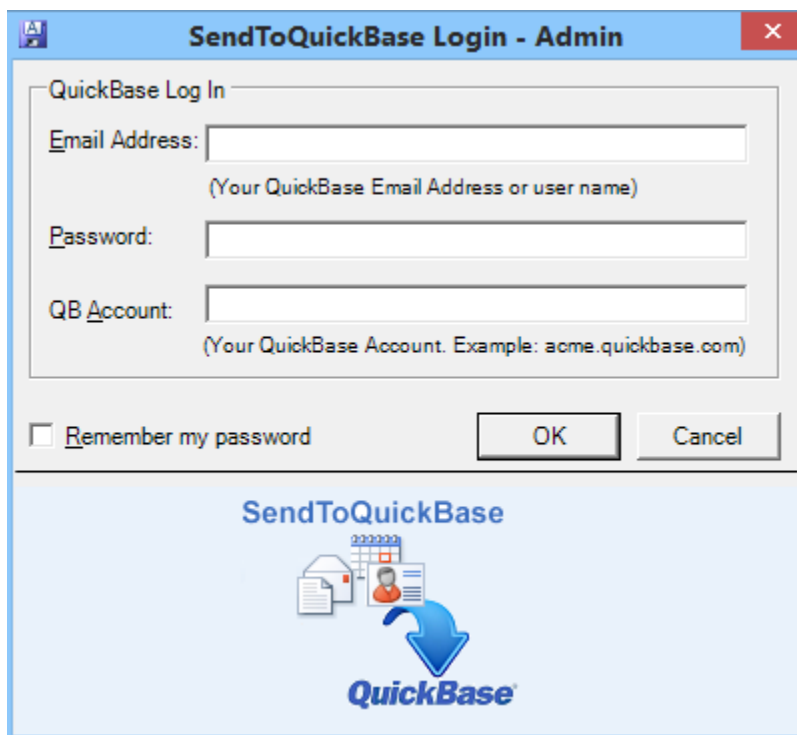
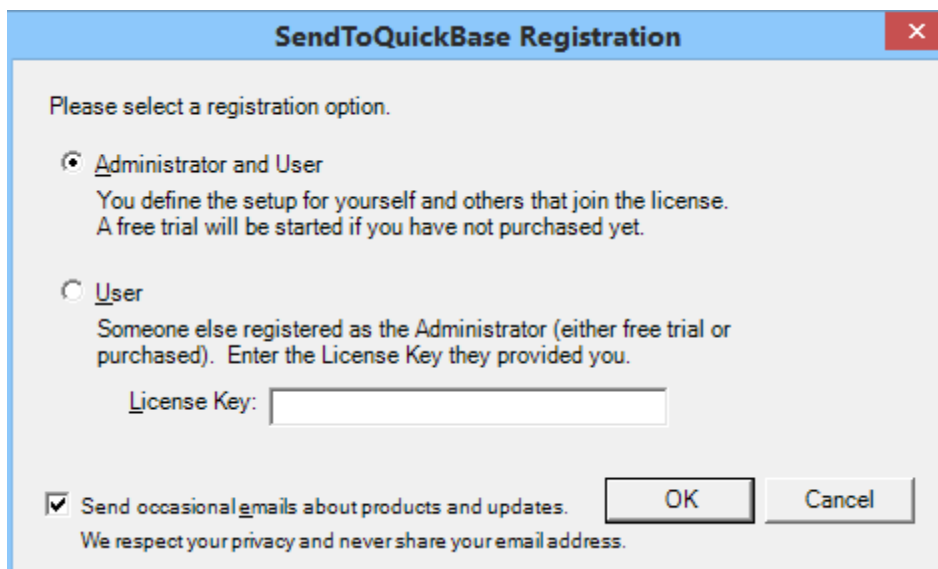


Figure 10 - Login Dialog

*Note:* If you have added the *QBHost* Registry value, then this appears in *QB Account*.

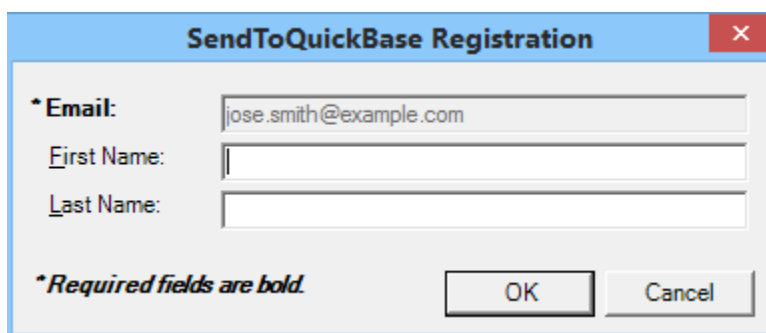
If you customized the MSI using an MST and entered your organization's License Key, the following dialog will show your Key. If you set *ShowRegistrationDialog* to *False*, then this dialog will not be shown.



The dialog box is titled "SendToQuickBase Registration" and contains the following elements:

- Text: "Please select a registration option."
- Radio button: "Administrator and User" (selected). Description: "You define the setup for yourself and others that join the license. A free trial will be started if you have not purchased yet."
- Radio button: "User". Description: "Someone else registered as the Administrator (either free trial or purchased). Enter the License Key they provided you."
- Text input field: "License Key:"
- Check box: "Send occasional emails about products and updates." (checked). Below it: "We respect your privacy and never share your email address."
- Buttons: "OK" and "Cancel".

Figure 11 - License Key Registration Dialog



The dialog box is titled "SendToQuickBase Registration" and contains the following elements:

- Text: "\* Email:" followed by a text input field containing "jose.smith@example.com".
- Text: "First Name:" followed by an empty text input field.
- Text: "Last Name:" followed by an empty text input field.
- Text: "\* Required fields are bold."
- Buttons: "OK" and "Cancel".

Figure 12 - User Registration Dialog

## Appendix A – Customizing User Options

Below is a list of SendToQuickBase options that the user can set in Outlook using the SendToQuickBase Options button. You can set a different default value for any of these by adding a new row in the Registry section of the transform. Note that you only need to add one of these options if you wish to change the Default Value the user receives after installation has completed.

**Note:** Any option with the Default value prefixed with a pound sign ('#') is numeric. If you create an entry for this option in the transform, the numeric value must be prefixed with a pound sign also.

If you do not wish your users to alter the Options, you should set the OptionsDisabled to True as defined in the table below.

For each option you wish to set, you must add a new row to the Registry section in the transform. The easiest way to do that is to duplicate an existing row, the LicenseKey entry.

If you are using the Orca program (described earlier in this document), follow these instructions with `SendToQuickBaseAddInSetup.msi` open in the Orca program and having already started the transform:

1. In the Registry section, right click the LicenseKey row, and select "Copy Row(s)".
2. Right click again, and select "Paste Row(s)".
3. Scroll to the bottom of the list, and you will see the duplicated row. Change the Name from LicenseKey to one of the Key Names in the table below.
4. Set the appropriate Value from the table below.

Lastly, don't forget to generate the transform.

Key Name	Option in GUI	Values	Default	Comments
AllowSaveToMultipleTables	Saving: Allow saving same item to different tables	True, False	False	
CheckForUpdates	Preferences: Automatically check for product updates	True, False	True	Add-In (and Admin program) checks every so often, and if an update is available, the user is asked to download and install the update.
CleanHTMLBody	Email Body: Clean up HTML Body	True, False	True	
ConfirmDeleteQuickBaseRecord	Saving: Confirm delete of Quickbase Record	True, False	True	
ConfirmSave	Preferences: Show confirmation message after sending	True, False	True	
DeleteAfterSave	Preferences: Delete item after sending to Quickbase	True, False	False	If true, item sent to Deleted Items Outlook folder.
DeleteQuickBaseRecord	Saving: Delete Quickbase record when Outlook item deleted if feature enabled in mapping	True, False	False	
DeleteQuickBaseAttachmentRecords OnUpdate	Saving: Delete Quickbase attachment records saved in different table on update	True, False	False	
Dupes	Saving: When saving previously saved item	NoDupes, NoDupesPrompt, AllowDupes	NoDupes Prompt	NoDupes is update record, NoDupesPrompt is prompt to update record. (Naming is historical, no update feature.)

Key Name	Option in GUI	Values	Default	Comments
EmailSignatureIgnoreCase	Email Body: Ignore capitalization in signature	True, False	True	Ignored unless EmailSignatureStrip is True.
EmailSignatureStrip	Email Body: Remove my signature from email body	True, False	False	If True, enables the feature
EmailSignatureToRemove	Email Body: Remove signature specified below	<any string>	<empty string>	Ignored unless EmailSignatureStrip is True.
EmailSignatureUseOutlookSignatures	Email Body: Remove signatures I created using Outlook (recommend)	True, False	True	Ignored unless EmailSignatureStrip is True.
HTTPReceiveTimeout	Preferences: Upload Timeout	Positive integer	#30000	In milliseconds, the timeout value for receiving data.
HTTPSendTimeout	Preferences: Download Timeout	Positive integer	#30000	In milliseconds, the timeout value for sending data.
HTTPUseTimeouts	No GUI to set this	True, False	False	Must be True otherwise HTTPReceiveTimeout and HTTPSendTimeout are ignored.
OpenAfterSend	Checkbox on dialog when sending new item: Open Quickbase record after save?	True, False	False	If True, acts the same as when the checkbox is checked.
OpenForEditInQuickBase	Preferences: When opening a Quickbase Record	True, False	True	If False, the record is opened in View mode.
OpenParentRecord	Preferences: Open related record when open after save	True, False	False	
OptionsDisabled	No GUI to set this	True, False	False	If True, users are not allowed to change their Options.
PromptForEmail	Preferences: Show list of records to select from if not found when sending	True, False	True	
QBHost	Logon dialog: QB Account edit control	URL of your Quickbase Account URL	<empty string>	For example, acme.quickbase.com.
QuickStart	Preferences: Quick Start	True, False	True	
RecordSelectFilterNumChars	Preferences: Record Select filter (num chars entered)	1 to N	#2	
RememberPassword	Logon dialog checkbox	True, False	False	
RemoveExtraLineBreaksFromBody	Email Body: Remove extra line breaks from Body	True, False	True	

Key Name	Option in GUI	Values	Default	Comments
RequireEnterToFilterRecordList	Saving: Require Enter to filter records	True, False	False	
SaveAttachments	Preferences: Save attachments when sending to Quickbase	True, False	True	
SaveMultiple	Preferences: If multiple records match on send, save a copy with all of them	True, False	False	
SaveReplies	Email Body: Include replies within email body	True, False	True	
SendEmailOption	Preferences: When sending or saving a new item	PromptToSend, AlwaysSave, AlwaysSend, IfCtrlKey, DoNotSend	PromptTo Send	AlwaysSend is "Send to Quickbase (if match exists)". DoNotSend is "Do nothing".
ShowEmailDomainMatches	Preferences: Only include records with the same domain in the email address	True, False	False	Ignored unless PromptForEmail is True.
TruncateIfValueTooLong	Saving: Truncate value if greater than Quickbase field maximum	True, False	False	If too long and not truncating, save of the record will fail.
UseDefaultRecord	Preferences: Use Default Record if no match found on save	True, False	False	
UseSendEmailOptionOnResave	Preferences: Use option above when modifying an item	True, False	False	
VerboseLogging	Preferences: Verbose Logging (Used to assist Support diagnose a problem.)	True, False	False	