PinPoint's Microsoft add-ins allow users to send files from your MS applications to your PinPoint fileroom. The add-in is currently available with Word, Outlook, Excel and PowerPoint.

To receive the add-in downloads, please inform your assigned project manager or use the Direct Chat function within the Help section of your PinPoint user menu.

MS Add-Ins Settings

1. Open the MS application you installed the add-in for, then locate the PinPoint buttons in the top-right corner of the application.
   - For Outlook, you must open an email first, then go to Add-ins to see the PinPoint buttons.
2. Click the Settings option for PinPoint to connect the add-in to your PinPoint database using the API credentials provided to you by LSSP.
   - Alternatively, you can load the API credentials from an XML file, which can be generated within the Settings from any PinPoint MS add-in already configured.
   - The same XML files can be loaded by any of the four Office applications supported (ex. XML files generated within the Word add-in can be loaded by Excel, PowerPoint, and Outlook).
   2. Enter the API Path, API Name, API Password, and Database provided by LSSP staff.
      - These credentials will remain the same for all supported MS applications and all users within your system.
      - Click the Set API Service button after entering the correct API Path.
      - Click the Test API Account button after entering your API Name and API Password.
      - Click the Test API Database name after entering the name of your Database.
   3. Enter your PinPoint user name and password into the User Name and User Password boxes, then click Test User Login.
   4. Click Save Settings.

Using the MS Add-Ins with PinPoint

1. Open the MS application, then you will see the following options located in the top-right of your menu (for Outlook, you must first open an email, then click Add-ins in the top menu).
   - Save To PinPoint
     This option allows you to manually select where to file the email and/or attachments. You will be required to select the Cabinet, Folder, Sub-Divider, and Doc Type.
   - SmartScan
     This option allows you to use one of the ARIE automated filing methods. After choosing your automated filing method, the file be sent to SmartScan within your PinPoint fileroom:
     - Native: https://lsspdocs.com/manuals/pinpoint/arie/arie-native/
     - Single: https://lsspdocs.com/manuals/pinpoint/arie/arie-single/
     - Multiple: https://lsspdocs.com/manuals/pinpoint/arie/arie-multiple/
     - Batch: https://lsspdocs.com/manuals/pinpoint/arie/arie-batch/
     - Check-In (not in Outlook): this automated filing method will check the file in as a new version of the same document. All previous versions are saved and can be viewed through the Fx actions menu.