

Mailissa User Documentation

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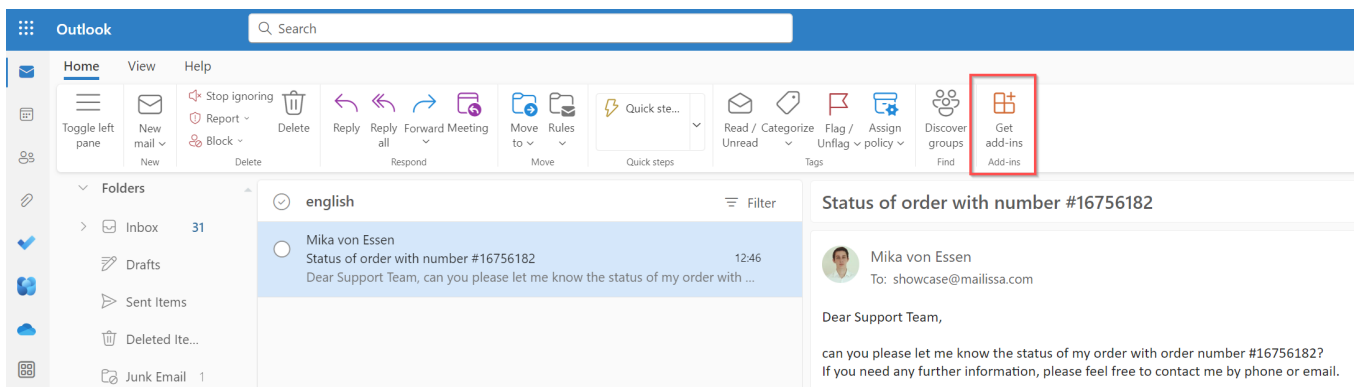
1. Get Started

1.1 Installation

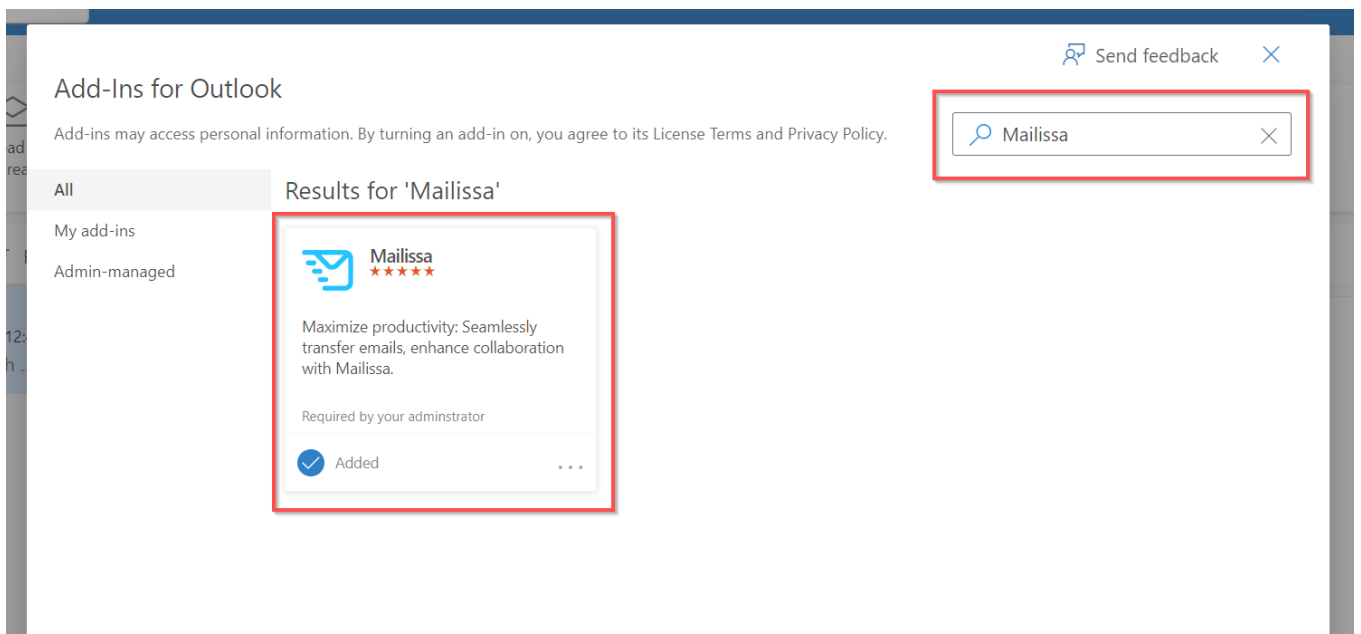
Following, the different ways to install Mailissa are explained.

1.1.1 Outlook (Client and Web)

Mailissa can be installed directly from Outlook. The Get add-ins button will take you directly to the store.



Now simply search for Mailissa and click Add. Mailissa is now added for your account!



1.1.2 Via Microsoft App Source Store

Mailissa can also be added via the general Microsoft App Source Store (for Office add-ins of all kinds). To do this, click on the following link:

[Microsoft App Source Store](#)


Now click on Get it now*. Mailissa** is now added for your account!

Microsoft | AppSource

Apps ▾ Mailissa

All Apps ▾ Categories ▾ Industries ▾ Consulting Services ▾ Partners ▾

Apps > Mailissa

 **Mailissa**
by Axontic GmbH
Outlook
★ 5.0 (2 ratings)

Pricing Additional purchase may be required **Get it now** ★ Saved

[Overview](#) [Ratings + reviews](#) [Details + support](#)

Maximize productivity: Seamlessly transfer emails, enhance collaboration with Mailissa.
Unlock Efficiency and Streamline Workflow with Mailissa for Outlook

1.1.3 Outlook for Mobile

Mailissa can also be installed directly on your mobile device. To do this, click on the options button of a mail and click Add-Ins.

12:39



Order status #16756182



You

To showcase@mailissa.com

17. Nov



Dear Support Team,

can you please let me know the status of my order with order number #16756182?

If you need any further information, please feel free to contact me by phone or email.

Thank you very much and best regards

Mika von Essen

Phone. [0421/9893816](tel:04219893816) - 5/26 -

Mail. mikavonessen@web.de

Now simply search for Mailissa and click on the +. Mailissa is now added for your account!

12:39



Order status #16756182



You

To showcase@mailissa.com

17. Nov



Dear Support Team,



Add-ins

Tap to manage and install your extensions

Mark as Unread

Flag

7/26 -
Reply

You

12:39



Add-ins

showcase@mailissa.com ▾

 **Blurred Add-in Name** 

 **Blurred Add-in Name** 



 **Blurred Add-in Name** 

 **Blurred Add-in Name** 

 **Blurred Add-in Name** 

 **Mailissa**
Axontic GmbH 

 **Blurred Add-in Name** 

 **Blurred Add-in Name** 

1.1.4 As admin

Mailissa can also be set up as an administrator for multiple or all users in your M365 environment. To do this, follow the instructions we have written:

[Set up Mailissa addin for multiple users in Microsoft 365](#)

1.2 Get Started

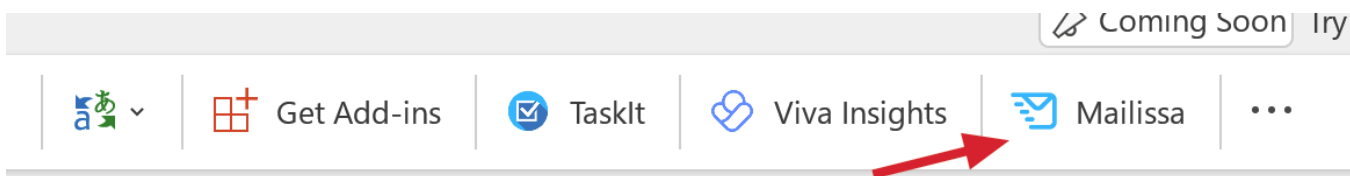
1.2.1 Where to find Mailissa

Notice

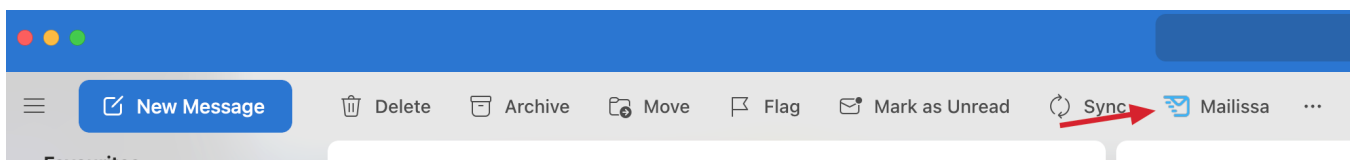
If you don't have Mailissa installed already, install it via the Outlook Add-In Store.

Mailissa is available in the smart ribbon toolbar. If you don't see it directly, checkout the three-dots menu to find it. Depending on the different clients Mailissa may be visible by default or hidden in this sub menu.

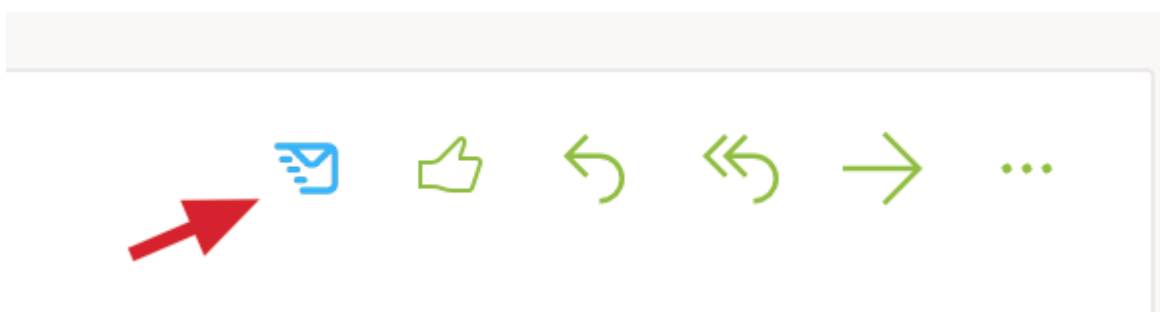
Outlook for Windows



Outlook for macOS



Outlook Web Access



If Mailissa does not appear in the toolbar, checkout the menu.

Once you found *Mailissa in the menu, you can pin it to the ribbon for easier access. Right click on the menu entry to get the options below:



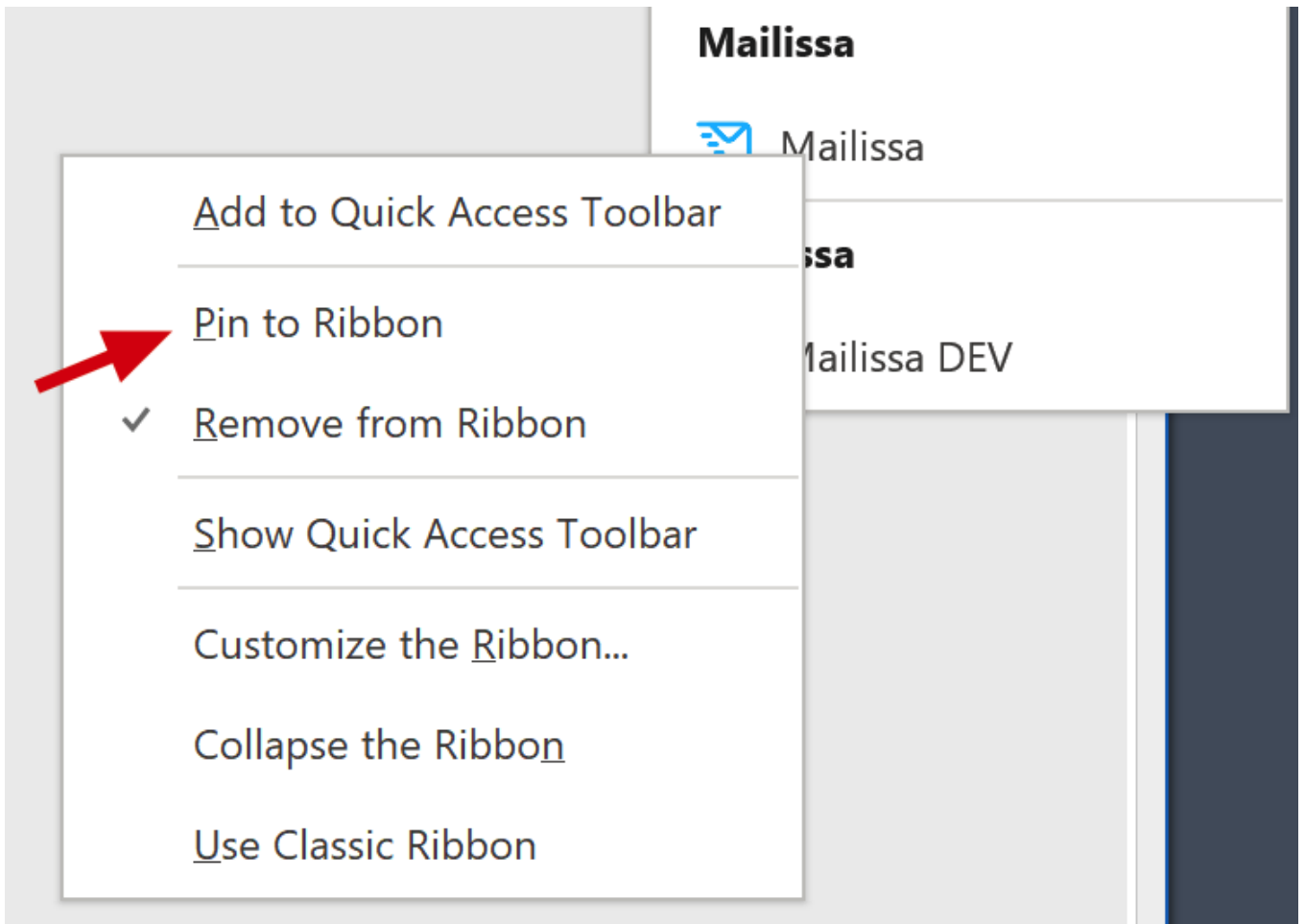
- Reply
- Reply all
- Forward
- Other reply actions >

- Delete
- Mark as unread
- Flag
- Add to board >

- Add to Safe senders
- Security options >

- Print
- View >

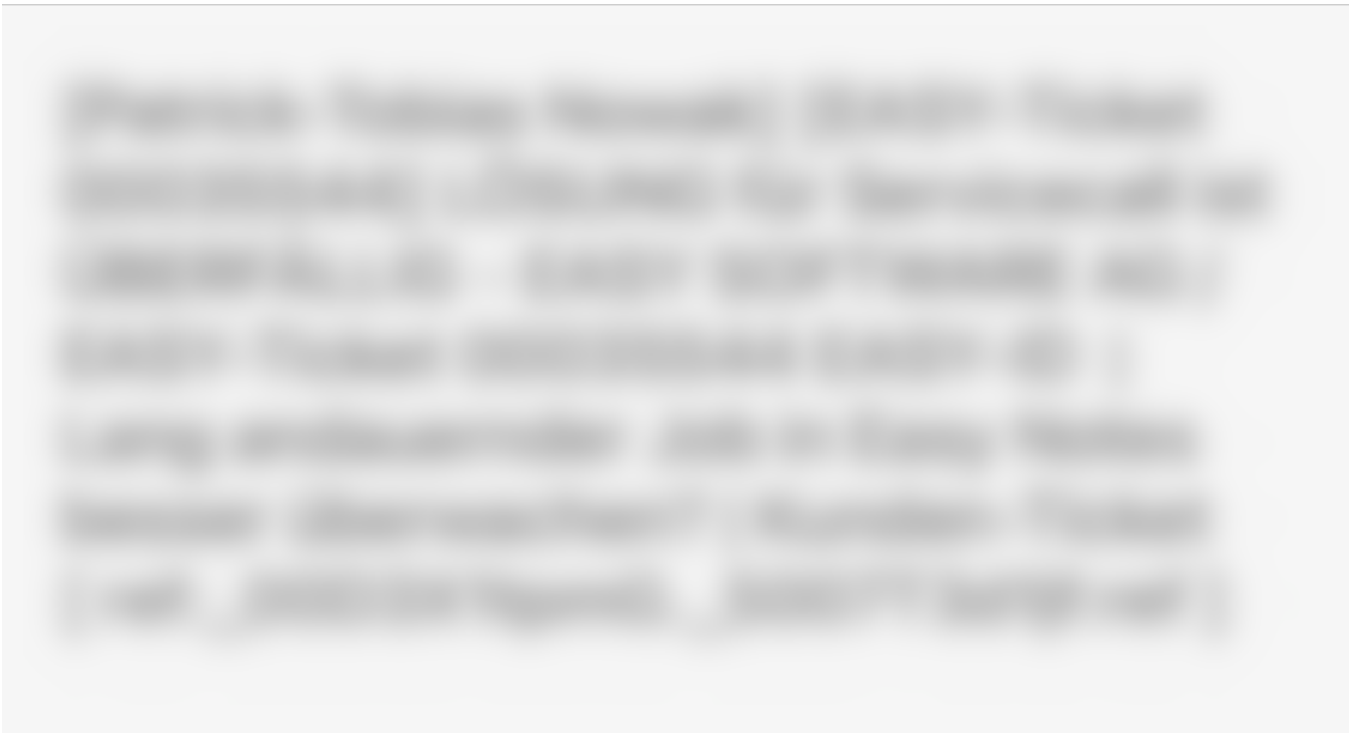
 Share to Teams



Outlook Mobile

13:13 ↗

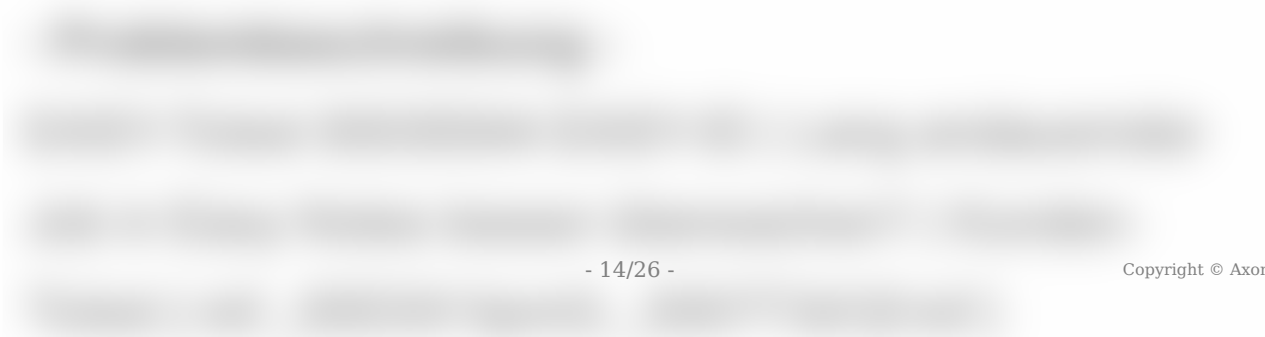
◀ Suchen



We4IT noreply

13:04

An Detlev Schümann, +3

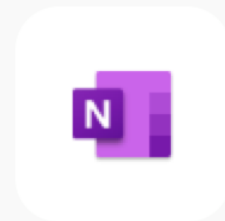


13:13 ↗

◀ Suchen



Mailissa



An
OneNote...

V
A

Als ungelesen markieren

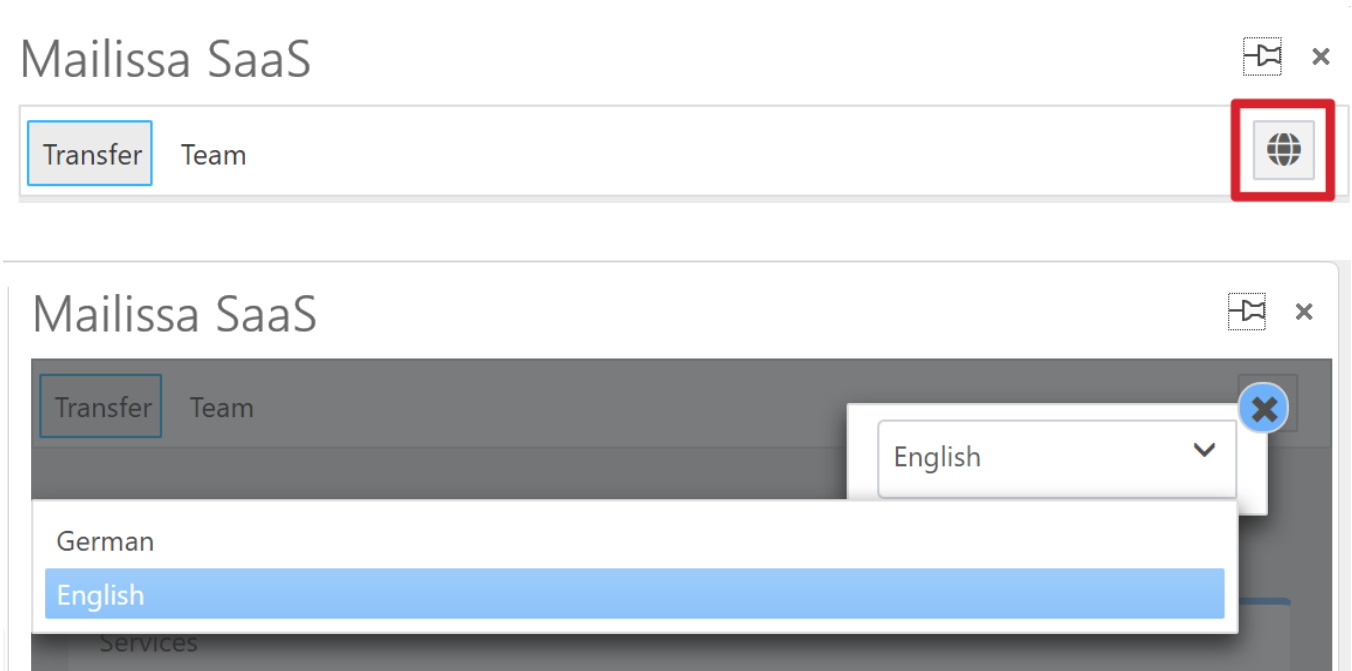
Flagge

Antworten

noreply

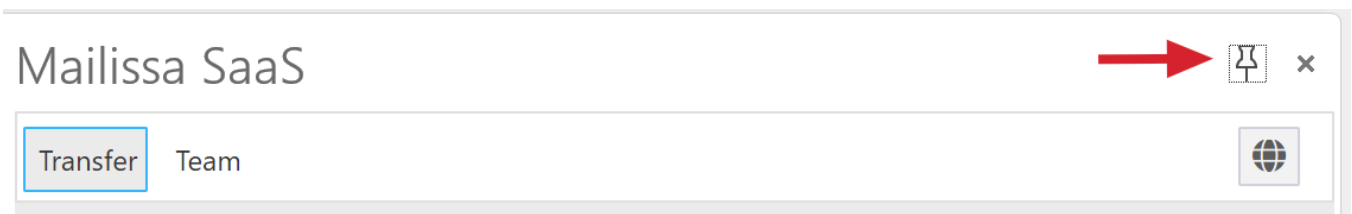
1.2.2 Setting your Language

To switch to your preferred language, click on the globe icon in the upper right corner and then select the language.



1.2.3 Pin Mailissa

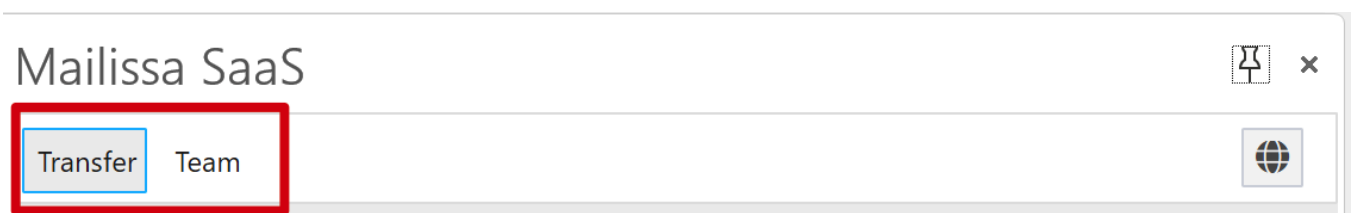
To prevent Mailissa from being closed after you used it, you can pin it to the sidebar using the pin icon.



1.2.4 Choose Module

Once Mailissa is loaded to the side bar, you can select the module you want to use:

- [Transfer](#)
- [Team](#)



2. Modules

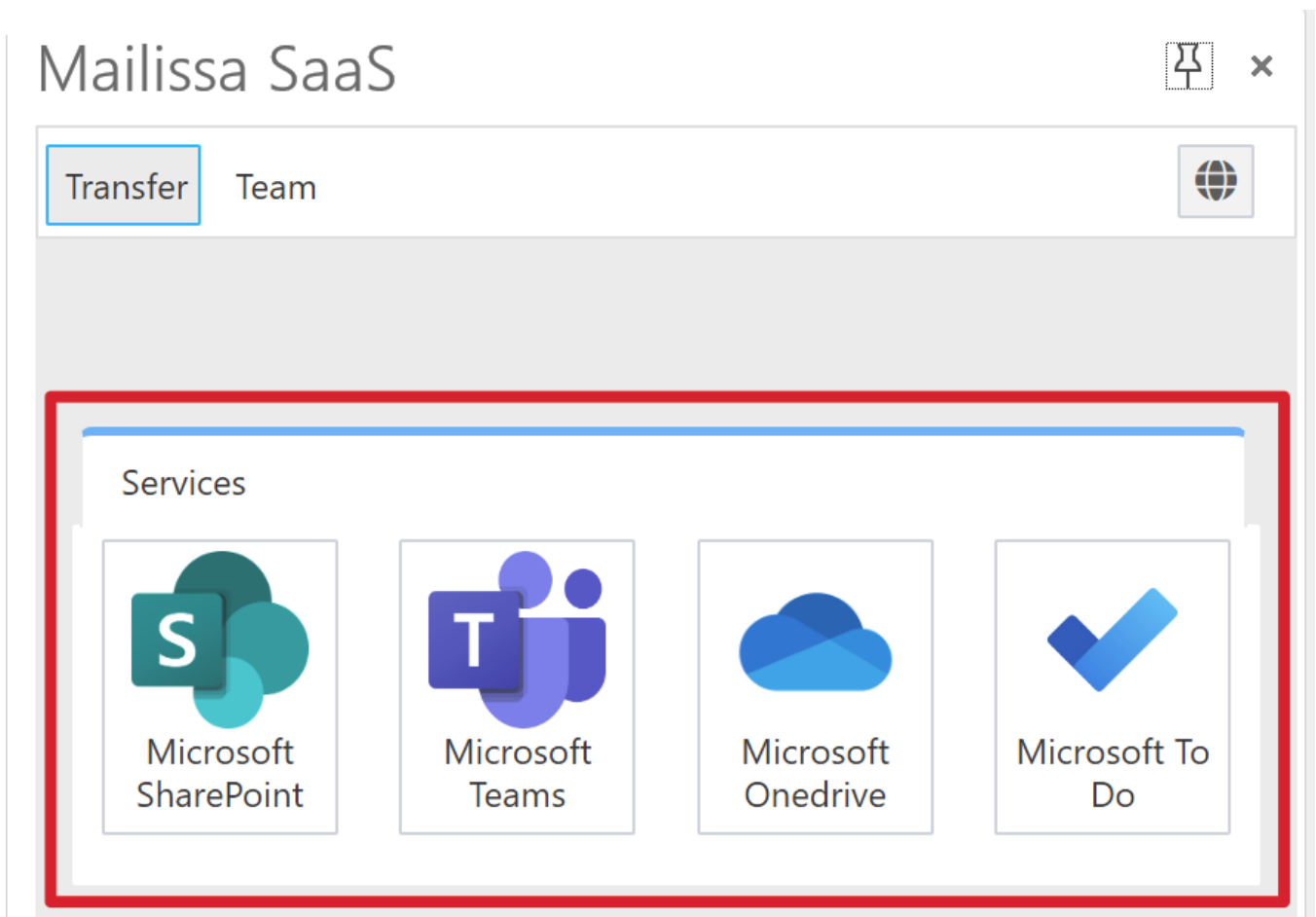
2.1 Mailissa Transfer

This module allows you to transfer the full mail or parts of it to another system or data storage. With this module you can share a mail with others who also have access to the areas in those external systems and data stores.

2.1.1 Services

In this area you see all services that are currently available for you. If you are missing a service, please contact your local administrator. He can activate or buy different services.

Mailissa comes with a variety of service enabled by default:



Each service has its own properties and functions which are easy to explore. Keep in mind that using those services always includes that you are going to share the mail with others, especially when you are using a service such as Teams or SharePoint.

Authentication

When you use a Mailissa service for the first time, you have to authenticate to it using your credentials.

A window will pop up where you select your identity and then provide your credentials. If this is successful, the window will close automatically and the service details are loaded. It may be that the window automatically disappears without any interaction needed from you. In this case the login process was finished automatically using the single-sign-on functionality.

Resetting your Credentials

You can reset your credentials for each service by opening the following web page:

Mailissa Portal

You have to login using your Microsoft credentials. After you logged in click on the "Manage Passwords" tab and you see the list of services and the state of your credentials:



Using the icons you can

- open the credential settings to change your current credentials (only available for services with basic authentication) (blue)
- test the connection to the service (green)
- remove the credentials for the service (red)

2.1.2 History

Using a service to transfer a mail creates an entry in the Mailissa history. The entry contains all options the user set during the transfer process. Later, a history entry can be used again with another mail. This will speed up the daily work as the user doesn't have to reselect the details.

History entries are created for each mail sender and as global entries.

Notice

Please notice that the history tab only appears after you transferred at least one mail.

Mailissa SaaS



Transfer Team

📘 The email was already transferred

Services

History

History for Mail-Sender ✎

OneDrive - pdf

Global history ✎

OneDrive - pdf

History for Mail-Sender

This list contains entries for the sender of the mail being processed.

Global History

This list contains all entries ever generated, independent of the mail sender.

Renaming a history entry

A service usually stores an entry with a certain name, depending on the service name and the action that was executed. However, you can rename entries for your convenience.

To rename an entry, click on the edit icon right of the section header (**History for Mail-Sender** or **Global history**). This switches the list into edit mode. Click on the edit icon next to the entry name to edit the name.

History for Mail-Sender ★

OneDrive - pdf

In the dialog, edit the name. Click **Save** to store the change or **Cancel** to abort editing.

The dialog box has a title bar at the top. Below it, the label "Name *" is followed by a text input field containing "OneDrive - pdf". At the bottom left is a "Cancel" button, and at the bottom right is a green "Save" button.

2.1.3 Favorites

With an increasing number of history entries it may help you to mark a few of them as favorites. This speeds up finding the desired history entry to reprocess the transfer for a particular mail sender or mail in general.

To add an entry to your favorites, simply click on the star icon next to the entry.

Notice

Please notice that the favorites tab is only visible if you have at least one favorite entry defined.

Mailissa SaaS

Transfer Team

The email was already transferred

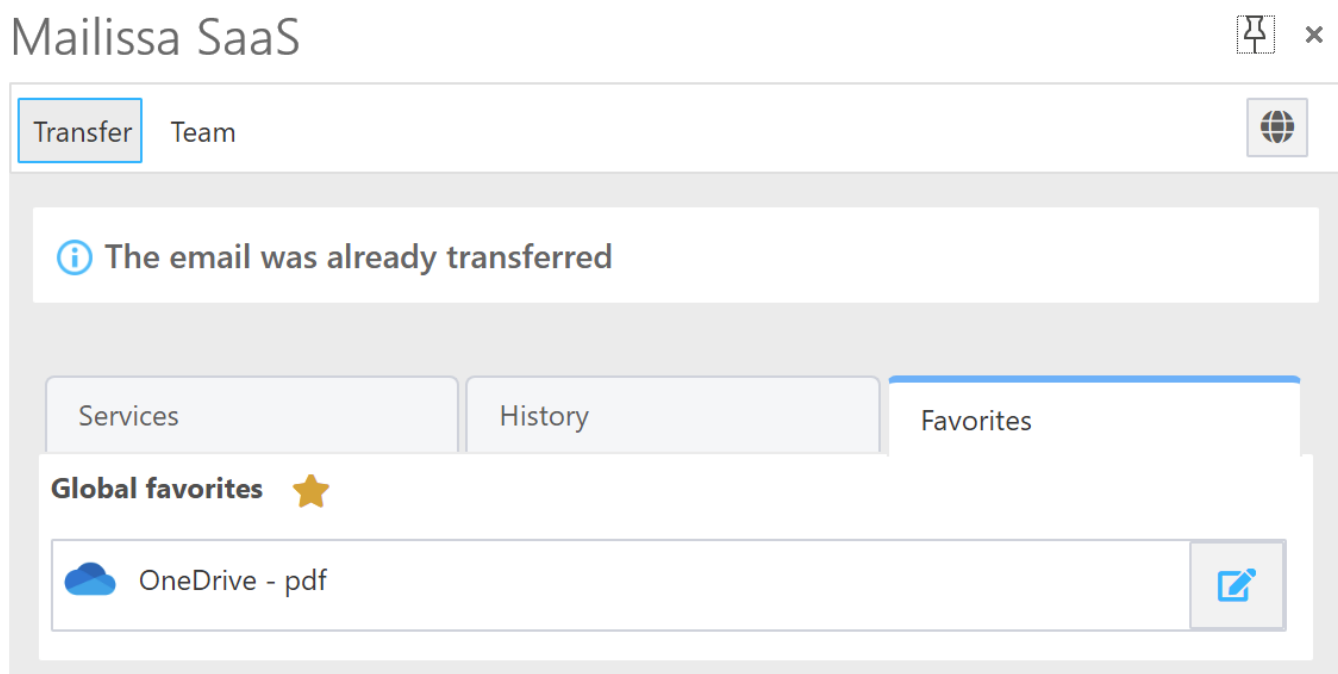
Services
History
Favorites

Global favorites

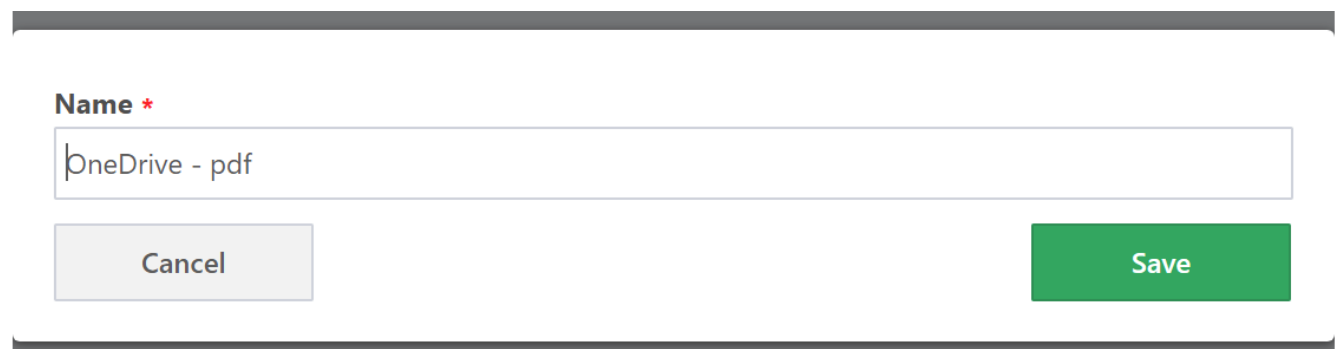
OneDrive - pdf

Edit Favorites

You can also edit the name of a favorite history entry. First click on the edit icon next to the section header (**History for Mail-Sender** or **Global history**). This switches the list into edit mode. Click on the edit icon next to the entry name to edit the name.



In the dialog, edit the name. Click **Save** to store the change or **Cancel** to abort editing.






2.2 Team

The main purpose of this module is to use mails to create simple processes used in an internal manner. With **Team** you can assign yourself or (in shared mailboxes) another person to be responsible for the mail and the operational process that may be behind that. For example if you are working with support mails, it is common sense to assign the task to a person who then takes actions according to the mail content.

2.2.1 Editor

With an mail selected, simply click on **Team** to select this module.

Mailissa SaaS
 

Transfer **Team**


Mail Subject
Please see my CV

No Editor Set

Mailissa Demo Four

Set editor

Category

No category ▼

Comment

Save

The add-in shows the subject and the editor information. You can take over for yourself by just clicking **Set Editor** or you can click into the editor field and start typing the name of another person.

Mailissa

Transfer Team

Mail Subject
AW: Vicente Diaz hat "1101FP5HF10_W64" mit Ihnen geteilt.

No Editor Set

mika

Mika von Essen

Category
No category

You can always unset the editor by clicking on **Release Editing**.

Mailissa SaaS

Transfer Team

Mail Subject
Please see my CV

Current Editor

Mailissa Demo Four

Release Editing

Category
No category

2.2.2 Category

To enrich the mail with meta data, you can categorize it. Categories are predefined for all users (and also the colors) by the admin of your Mailissa subscription.

Mailissa SaaS

📌 ✕

Transfer Team 🌐

Mail Subject
Please see my CV

Current Editor

Mailissa Demo Four

Release Editing

Category

No category ▼

- No category
- In progress
- ToDo
- Done
- Deferred

2.2.3 Comment

Finally you can enter a custom comment text to record additional information about the mail or the process itself.

Mailissa SaaS



Transfer

Team

**Mail Subject**

Please see my CV

Current Editor

Mailissa Demo Four

Release Editing

Category

ToDo

**Comment**

Please check back next week

Save

When you click on **Save** the comment is added to the history list. The same applies to every time you change the editor or select another category.

2.2.4 History

Category

ToDo 

Comment

Save

History

Apr 21, 2022, 2:11:00 PM | Mailissa Demo Four

Please check back next week

Apr 21, 2022, 2:11:00 PM | Mailissa Demo Four

Changed category to 'ToDo'

Apr 21, 2022, 2:06:43 PM | Mailissa Demo Four

Took over editing

