Slate — Linking Slate to Microsoft Outlook and Email to Slate Gateway

You will need:

- Internet connection
- Your JHED ID and password
- Web browser: Firefox, Safari or Chrome
Overview

🌟 Using the Microsoft Outlook Add-in and Slate Gateway allows for posting external emails to a Slate record.

🌟 This document is broken up into two sections: Linking Slate to Microsoft Outlook and Email to Slate Gateway

Note: Windows users can use both methods; however, **Mac users must use the Email to Slate Gateway feature** as the Microsoft Outlook Add-in feature is not available.
Linking Slate to Microsoft Outlook

This process can be utilized by Windows users only.
1. https://applygrad.jhu.edu/manage

Enter your JHED credentials
2. Click Database.
3. Under Messages, click **Microsoft Outlook Add-in**
The setup.exe file will appear in the lower left corner of the screen.

Click the file to launch the setup.

Click Install.
Click Close once the file is installed.

Restart Outlook.

Click Add-ins from the top menu bar.
Highlight the email you want to import into Slate.

Click Technololutions Slate.
Enter the Slate domain: applygrad.jhu.edu

Click Login.
Login with your JHED credentials.
Slate will attempt to link the email address to an existing record. It will tell you if a record was found.

If no record was found, you can do the following:

- **Create Record** for a new prospect to be created
- **Relink** it to an existing record
To **Relink**, complete the following steps:

**A** **Click Relink.**

**B** **Type the name of the prospect or the email address.** Then, **select the record.**

**C** **Click Add to File.**
A notice will appear that the message has been filed successfully.

Click Close.

The imported email will appear in Slate as an **External** interaction.

Click the message to see the full content.
Email to Slate Gateway

This process can be utilized by Windows and Mac users.
1. **Enter your JHED credentials**

   ![Login page](https://applygrad.jhu.edu/manage)
Click Database.
Under Messages, click Email to Slate Gateway
You will be prompted with a unique gateway code. DO NOT share this code. Note: the code has been blurred in this document for security purposes.

Follow the directions in the box.

Continue to the next page for an example of using this code.
Sample email that is going to be sent to a prospect or student.

Prospect or student

Gateway code in Bcc line.

Thank you for talking with me today about your program of interest.

Please reach out if you have any questions.

Always use Bcc or forward the message directly to the Gateway code.

DO NOT include the gateway code in the ‘To...’ or ‘Cc...’ lines when replying to a student.
Additional Information About Using Gateway Codes

- Messages received by this Gateway will typically be added to the student records within 15 minutes of receipt.
- The imported email will appear in Slate as an **External** interaction.
- Click the message to see the full content.
Since you are not explicitly linking this message to the student record, access the Gateway Inbox to do so.

- Linking the messages insures the message query base shows all external emails on the person record.

A Click the Deliver icon on the top menu bar, then click Mailings.

B Click Gateway Inbox link on the right navigation menu.
Additional Information About Using Gateway Codes (cont.)

All external emails that have not been explicitly linked to a person record, regardless of school/user will display here.

- The ‘Users’ dropdown, left blank, will show all records that need attention.
- You can work just those messages you sent to the Gateway by selecting your user name from the dropdown menu.
- Anyone can link the messages to person records regardless of whether they were sent by that user.
Additional Information About Using Gateway Codes (cont.)

- Click the email you want to link to a person record.
- Slate will attempt to identify which record the email should link to. If you see the correct record with blue links, **click the link** and the record will populate in the ‘Assignee’ block. Next, click **Assign**.
- If you do not see a correct record in blue, **start typing the name** in the ‘Assignee’ block until the correct record appears and then click the record to populate in the ‘Assignee’ block. Click **Assign**.
- The email record will then be removed from the Gateway Inbox listing.
- The practice of monitoring and maintenance of the Gateway Inbox should be implemented to ensure message queries are up to date.