



## **Bells & Whistles v3 for Outlook**



### **Standard print manual**

<COPYRIGHT 2004 - 2006 DS Development SRL>

# Table of Contents

Foreword	0
<b>Part I About Us</b>	<b>3</b>
1 About DS Development .....	3
2 Contact Us / Service Support .....	3
3 Other Products from DS Development .....	4
<b>Part II Licensing Questions</b>	<b>5</b>
1 How to Purchase Your License .....	5
2 Ordering & Payment Options .....	6
3 Volume Discounts Table .....	6
4 Transaction Security & License Protection .....	7
5 Benefits of Licensed Users .....	7
6 30 Days Refund Policy .....	7
7 Product Upgrades Policy .....	7
8 How Do I Re-install a License? .....	8
9 Lost Your License? .....	8
10 License Activation Problems? .....	8
<b>Part III Getting Started</b>	<b>9</b>
1 System Requirements .....	9
2 Installing Bells & Whistles for Outlook .....	9
3 Updating from Older Versions of Bells & Whistles .....	9
4 Basics of the User Interface .....	10
5 Uninstalling Bells & Whistles for Outlook .....	11
<b>Part IV Reply Options</b>	<b>11</b>
1 Using Reply Profiles .....	12
2 Reply Greetings .....	13
3 Numbering Replies per Subject .....	14
4 Handling Attachments on Email Replies .....	14
5 Automatically Setting the Reply Format .....	15
6 Adding Replied Addresses to Outlook Contacts .....	16
7 Email Signatures .....	16
<b>Part V Alerts &amp; Notes</b>	<b>17</b>
1 Enabling the Notes Feature .....	17
2 Working with Email Notes .....	17

3 Using Alerts .....	19
<b>Part VI Email Templates</b>	<b>20</b>
1 Explaining the Templates tab .....	20
2 Working with Categories .....	21
3 The Template Editor .....	21
4 Inserting a Template into Emails .....	23
<b>Part VII Other Options</b>	<b>23</b>
1 Add Date/Time Stamps .....	23
2 Using Email Tracking IDs .....	24
3 Send Again Options .....	24
<b>Part VIII Send Options</b>	<b>25</b>
1 Send Options Tab .....	25
2 Using Send Rules .....	25
3 Explaining Rule Actions .....	26
4 Send Again / Edit & Send Again .....	28
<b>Part IX Attachment Blocking</b>	<b>29</b>
<b>Part X Using Options per Outlook Profile</b>	<b>29</b>
<b>Part XI Export &amp; Import Settings</b>	<b>30</b>
<b>Part XII Using the Outlook Addin Utility</b>	<b>31</b>
<b>Part XIII Checking for Product Updates</b>	<b>32</b>
<b>Part XIV Frequently Asked Questions</b>	<b>33</b>
1 How Do I Print This Help File? .....	33
2 Does It Work with Outlook Express? .....	33
3 Does It Work with Any MS-Office Regional Version? .....	33
4 Can I Use It with MS-Exchange? .....	33
5 Outlook Disabled Bells & Whistles, What Now? .....	33
6 Why JPEG or RAR Files Are Not Compressed? .....	34
7 Any Known Conflicts with Other Outlook Addins? .....	34
<b>Index</b>	<b>35</b>

## 1 About Us

### 1.1 About DS Development



#### Company Profile

At DS Development, we deal with digital ideas. We have the inspiration to produce them and the knowledge to turn them into reality. With inspiration and knowledge, we produce solutions. We create Intelligent Software.

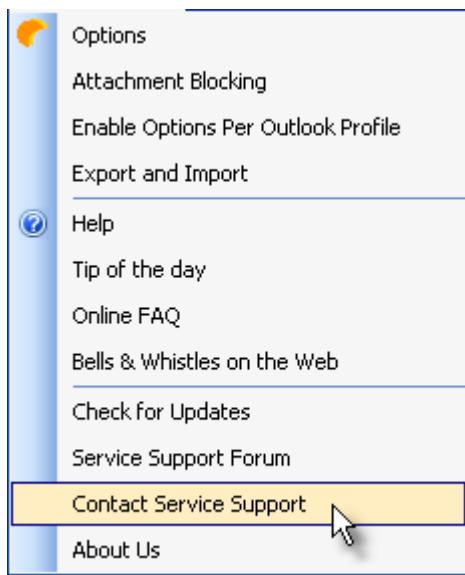
In 1998, DS Development was formed by a group of IT industry and programming professionals to develop, market and provide email communication, protection and management software solutions and services for world-wide businesses. Our mission is to provide organizations of all sizes with the ability to take full advantage of the communication benefits offered by the Internet.

We take great pride in the amount of time and efforts we put into developing our products line and our best reward is your satisfaction. The high quality of our products and the excellent customer service support, relying on your positive feedback, make us believe we are on the right track for offering you the best products and services you can get.

DS Development is also committed to offering high quality programming services and cost effective solutions for business software development, proving that Romanian programmers rely on imagination and innovation as their best arguments to hold their top position on the IT scene.

### 1.2 Contact Us / Service Support

The best and easiest method of reaching our service support department is by using the "**Contact Service Support**" function located under the main Bells & Whistles menu displayed on the Outlook main toolbar area:



We also strongly recommend you to use our [Service Support Forum](#) to post and discuss any problems you may have related to our products.

How to contact us:

General inquiries: [info@emailaddressmanager.com](mailto:info@emailaddressmanager.com).

24/7 free technical support: [support@emailaddressmanager.com](mailto:support@emailaddressmanager.com).

Programming services: [outsourcing@emailaddressmanager.com](mailto:outsourcing@emailaddressmanager.com)

Suggestions box: [suggest@emailaddressmanager.com](mailto:suggest@emailaddressmanager.com)

S.C. DS Development S.R.L.

Phone: +40-31-4027259

Fax: +40-21-4442710

22 Serban Voda Avenue, Sector 4

Bucharest, Romania

## 1.3 Other Products from DS Development

We take great pride in the amount of time and efforts we put into developing our products line and our best reward is your satisfaction. The high quality of our products and the excellent customer service support, relying on your positive feedback, make us believe we are on the right track for offering you the best products and services you can get.

To download evaluation versions of our products, please visit this page:

<http://www.emailaddressmanager.com/products.html>

### **Easy Mail Merge for Outlook**

- Automatically compose individual personalized emails for a mailing list;
- Use logical scenarios to vary the personalized text;
- Import email addresses and mail merge records from Outlook Contacts, Outlook Distribution Lists or CSV files;
- Set email sending options, such as choosing when the emails are sent, how many to send at once and what delay to have between emails.

### **Auto Reply Manager for Outlook**

- Auto reply addin for Microsoft Outlook;
- Create out of office auto replies or redirect emails;

- Supports complex rules generation, based on email accounts, keywords, date/time periods and more;
- Fully integrated with Microsoft Outlook, it does not require Microsoft Exchange or any special mail server software.

#### **Email Address Collector**

- Email extractor for Microsoft Outlook, Outlook Express, MSN Messenger, Outlook Contacts, Windows Address Book or any local files.
- Exports email contacts to the Windows Address Book, Outlook Contacts or CSV files.

#### **Email Sentinel Pro**

- Block unsafe attachments, e-mail viruses, spam validators and other malicious e-mails;
- 5 email protection levels tailored on your needs.

#### **SilentMail for Outlook**

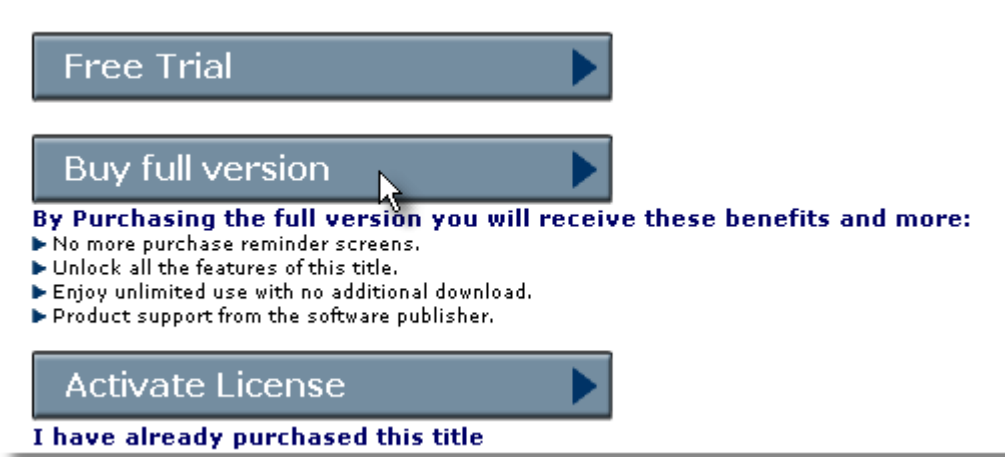
- Monitor every email that leaves your company.
- Easily enforce your email policies.
- Silently watch every outgoing email without alerting the sender.
- Smooth integration with Microsoft Outlook.

## **2 Licensing Questions**

### **2.1 How to Purchase Your License**

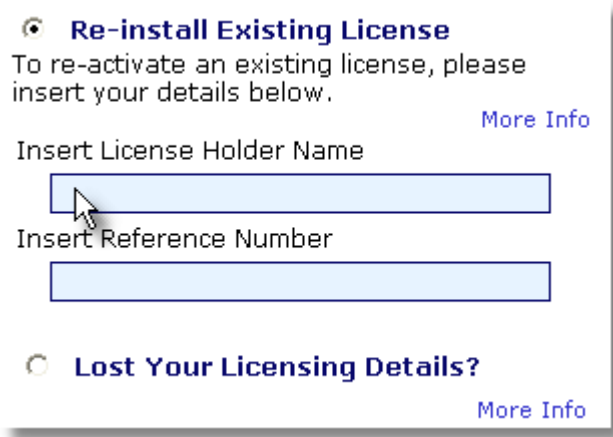
To purchase, please download the evaluation version of our product then follow the "Buy Now" instructions from the product startup screen (displayed when you start Microsoft Outlook).

In order to purchase your license, click on the Buy Now button from the application startup screen, then choose to Purchase license and then enter your billing details. You can securely purchase by credit card or by PayPal.



Once you placed your order, you will receive an email with your registration details, including the Licence Holder Name and Purchase Reference Number.

In order to activate or to re-install your license, from the same startup menu, click the Activate License button and then select to Re-install existing license. You will have to enter your registration details, as they were provided in the purchase confirmation email.



The screenshot shows a web form with two radio button options. The first option, 'Re-install Existing License', is selected. Below it, there is a text input field for 'Insert License Holder Name' and another for 'Insert Reference Number'. A mouse cursor is pointing at the first input field. To the right of each input field is a 'More Info' link. The second option, 'Lost Your Licensing Details?', is unselected and also has a 'More Info' link.

## 2.2 Ordering & Payment Options

### Online Ordering & Payment Options

Our online ordering and licensing system is provided by Softwrap Ltd, in association with VerSign. You can purchase by using PayPal or by using a valid credit card (Visa, Mastercard, American Express). You can access the online ordering system by clicking on the related "Buy Now" button from our web pages. As an alternative, you can also purchase online from within our product window: simply download, install and start any of our products and you will notice a startup window allowing you to place a license order.

You will find the name "www.softwrap.com" on your credit card statement for any online purchases from our web site.

### Offline Ordering & Payment Options

The offline ordering method is available by request, as an alternative payment method only for volume orders. The payment is to be done via wire transfer in our USD bank account.

## 2.3 Volume Discounts Table

### About Volume Licensing

Our Volume Licensing program provides you or your organisation with discounts whenever your purchase more than 4 licenses at the same time.

### How Does Volume Licensing Work?

The Volume Licensing program offers discounted pricing based on your order quantity. The greater the volume, the higher the discount.

### How Do I Apply?

If you wish to purchase more than 4 licenses at the same time, please contact us prior to placing your order and we will instruct you on how to take advantage of our discounts.

### Discounts Table (available for all our products)

5 - 15 licenses: a 10% discount will apply from the single license price;  
16 - 25 licenses: a 15% discount will apply from the single license price;  
26 - 50 licenses: a 25% discount will apply from the single license price;  
51 - 120 licenses: a 40% discount will apply from the single license price;  
121 or above: a 50% discount will apply from the single license price;

Site license (unlimited license activation within the same organization): please [contact us](#) for details.

## 2.4 Transaction Security & License Protection

Our online ordering and licensing system is provided by Softwrap Ltd, in association with VeriSign. The ordering system is powered by VeriSign, fully secured online credit card payment protection. The ordering form is protected via a secured HTTP connection (HTTPS), using SSL encryption technology.

Once the license was ordered and activated on your computer, it is protected by the Softwrap technology, so it can not be copied from your computer and used somewhere else.

## 2.5 Benefits of Licensed Users

Every registered/licensed user of any of our products benefits from:

- Full & free service support, on 24/7 basis;
- One year FREE upgrades;
- Discounts on other DS Development products;
- Early access on to-be-released new products and major upgrades;
- 30 days money back guarantee, no questions asked.

## 2.6 30 Days Refund Policy

All our customers, no matter the product they ordered or the amount of licenses, always benefit from our 30 days refund guarantee. **This means you can ask us to fully refund your money, if you are not satisfied with our software.**

*To initiate a refund, simply email us with your License Holder Name and/or Purchase Reference Number and we will proceed the refund process ASAP.*

*Please allow up to 30 days for the refunded money to get in your account - it normally takes only a few days, but the period mainly depends on the banking system, not on our company.*

## 2.7 Product Upgrades Policy

### One year free upgrades

Every licensed user benefits from one year free upgrades. DS Development reserves the rights to charge for **major product upgrades** (for example, upgrading from v1 to v3 of Bells & Whistles) if more than 1 year has passed since the product license was purchased.

### Upgrading from previous versions

As a registered customer, you will benefit of one year free upgrades on the licensed product. If a newer product version is available for download on our web site, please download and install it over the product version that you are currently running. Next time when you will run the updated program, the licensing engine will automatically pickup your existing license. If it doesn't do so, simply click to re-activate your license on the startup screen on our product and then enter your License Holder Name and Reference Number.

### Checking for product updates

To verify if there are any new updates available for our products, simply use the "[Check for Updates](#)" button available under the Help menu of all our products. If a new update is found, the program will ask you if you want to download it now or later.



## 2.8 How Do I Re-install a License?

To re-install software that you have removed on the same PC or move the license to a new one, you must re-run the software's original installation set-up. Softwrap™ may detect that you have previously bought this software and will automatically run in a purchased status. This means you will not see the Softwrap Dialogue box and will have the full use of the software. If the system does not detect the purchase, this could be due to a major change to the hardware of your system or the installation taking place on a new PC. You can now simply select to re-install the license from the Softwrap dialogue box and using your License Holder Name and Purchase Reference Number received by email during your original purchase, the software can be unlocked to a purchased state.

*In the event you no longer have the Licence Holder Name and Purchase Reference Number details please [please click on this link](#) or [email us](#) with your full name, approximate date of purchase, last 4 digits of the 16 digit credit card number you used to effect the purchase as well as the the name of the Software title you are wishing to re-install.*

## 2.9 Lost Your License?

If you need to reinstall your license, but you can't find your license registration details, [please click on this link](#).

*Please make sure that you fill the license request form with the same email address that was used on the license purchase form. If that email address is no longer in use, please [email us](#) with your full name, approximate date of purchase, last 4 digits of the 16 digit credit card number you used to effect the purchase as well as the the name of the Software title you are wishing to re-install.*

## 2.10 License Activation Problems?

For detailed answers and information on potential license activation problems, please see our [service support section](#) dedicated to this subject.

The most common license activation errors happen because:

- you are trying to activate a license on a product major version newer than the one of your purchase (eg: trying to activate Bells & Whistles v3 with a license issued for Bells & Whistles v1.2);
- you are not allowed to re-activate your single-user license because you already activated it on more than 2 computers (each single-user license can only be activated on max 2 computers at a time). If you have a new computer and you want to reinstall your license, but you receive the error "maximum count reached", please [contact us](#) and we will assist you on solving the problem;
- you are using a firewall that prevents our program from communicating with the Softwrap licensing server. If you have problems activating your license while your firewall is on, please disable it and then try again to activate your license;
- if you are using a proxy server for your Internet connection, please make sure it is setup to handle/allow HTTPS connections;
- if you receive an error like "memory debug detected" or "filemon detected", please make sure that you don't run any memory managers, file monitoring programs or debuggers while trying to register. For license security reasons, you are not allowed to activate a license if such a program is running.

## 3 Getting Started

### 3.1 System Requirements

#### Bells & Whistles System Requirements

Personal computer with 300MHz Pentium® processor.

64 MB RAM (128MB recommended).

10 MB available hard disk space.

Microsoft® Windows 98, Microsoft® Windows Me, Microsoft® Windows 2000, or Microsoft® Windows XP.

Microsoft® Outlook 2000, 2002/XP or 2003.

Internet connection (to purchase and register your license).

### 3.2 Installing Bells & Whistles for Outlook

Once you [downloaded](#) or obtained the setup file of Bells & Whistles for Outlook, simply run it in order to install the Outlook addin. To properly install it, please make sure that:

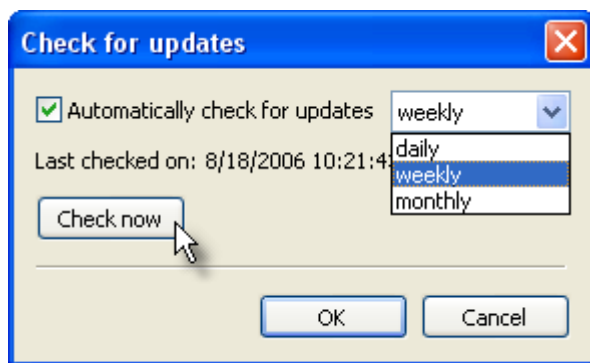
- Microsoft Office Outlook 2000 or higher is already installed on your computer;
- You have at least one email account defined in Microsoft Outlook;
- You are logged on to Windows via a local Windows account with administrator rights;
- Microsoft Outlook is not running while Bells & Whistles for Outlook is being installed.

During the installation process, you can choose to perform a full installation (all modules will be installed) or a custom installation (you can choose to install just the addin for Outlook or to install the Outlook Addin Utility, too). Also, you can choose to install the addin only for the active Windows account (the one on which you are currently logged on) or to install it for all local Windows accounts (so Bells & Whistles will be accessible through all accounts of your Windows operating system).

When the installation is done, simply start Microsoft Outlook: you will notice a new startup screen, showing you the licensing options for Bells & Whistles. You can choose to use the free trial period without any cost, to buy one or more licenses for it, or to activate a license that you previously bought.

### 3.3 Updating from Older Versions of Bells & Whistles

Bells & Whistles v3 comes with its own live update module, allowing you to easily check for updates on the program. By default, the program will check for updates weekly, but you can change this setting and you can manually check for updates whenever you want. The "Check for Updates" function is located on the Bells & Whistles menu displayed on the main toolbar area of Outlook:

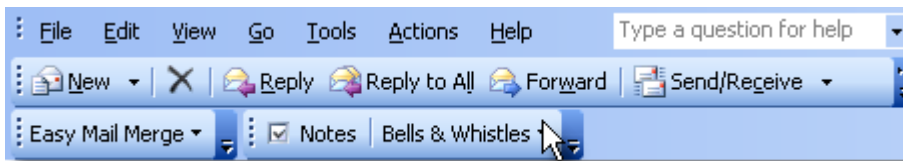


If an update is found on our server, the program will ask you if you want to download & install the update. Once the download is completed (a download icon is displayed on your systray icons area, showing you the download progress), it will automatically start [the install process](#). Please make sure Outlook is not running while performing the update installation.

- If you install an update on a registered version of Bells & Whistles and if it is a minor update (like updating from v3.01 to v3.2), the licensing engine should automatically find and use the existing license, without asking you to re-activate your license.
- If you install an update on a non-registered (trial) version of Bells & Whistles or if you are performing a major upgrade (like upgrading from v1 to v3), then the licensing engine will prompt you to try the new version, to buy a license or to activate it. If you consider that the Try/Buy/Activate screen is displayed by mistake, then please [contact us](#) with your license details and we will promptly assist you.

### 3.4 Basics of the User Interface

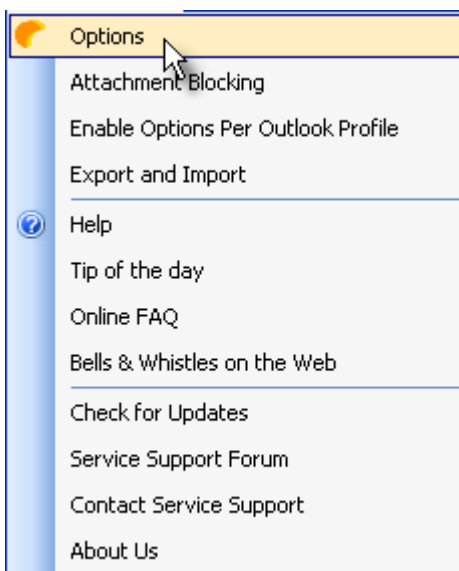
In order to use Bells & Whistles, you need to start Microsoft Office Outlook. On the main Outlook window, you will notice a new menu toolbar, called Bells & Whistles for Outlook:



The Bells & Whistles toolbar menu consists of two buttons:

- the Notes button: by clicking on it, you will add an email note on the email message which is currently selected in your mailbox folder. You can achieve the same goal by right clicking on the email message and selecting Notes from the right click menu;
- the Bells & Whistles button: this is a drop-down list button that will display the main options & settings of Bells & Whistles for Outlook.

Most of the Bells & Whistles goodies can be found under the Options menu entry:



The Options window is designed using a tabbed interface. This means that we grouped the program

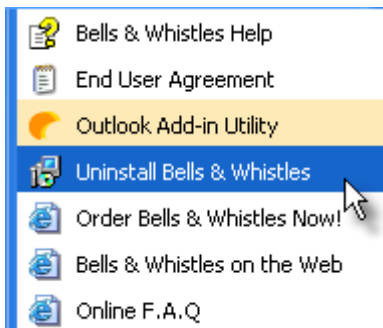
functions on 5 sections (or tabs). You can switch between these tabs by clicking on the top tab names:



To learn more about each function or option, please see the related help menu entries from the Table of Contents of this help manual.

### 3.5 Uninstalling Bells & Whistles for Outlook

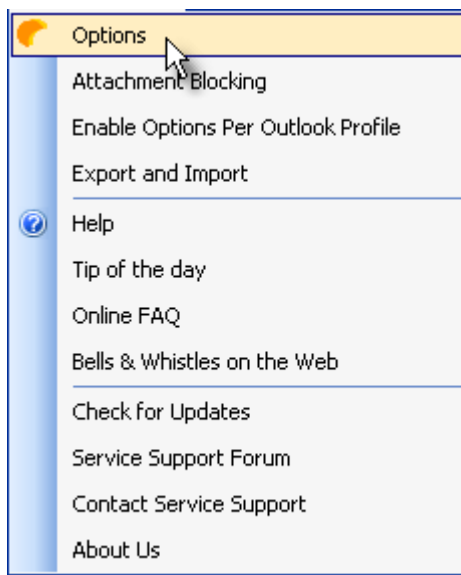
If you decide to uninstall Bells & Whistles for Outlook, please use its Uninstall function located in the Bells & Whistles programs group:



When you perform the uninstall sequence, please make sure Microsoft Outlook is not running, otherwise the uninstall script will fail to uninstall all Bells & Whistles entries. During the uninstall process, you can choose to keep the [Outlook Addin Utility](#), for free. You can later use it to manage (enable/disable) other Outlook addins that can't be easily enabled or removed from Outlook.

## 4 Reply Options

The Reply Options tab can be accessed by clicking on the Options menu entry of the [Bells & Whistles toolbar](#), displayed on the main Outlook window:

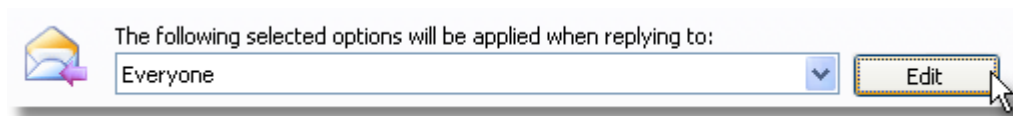


## 4.1 Using Reply Profiles

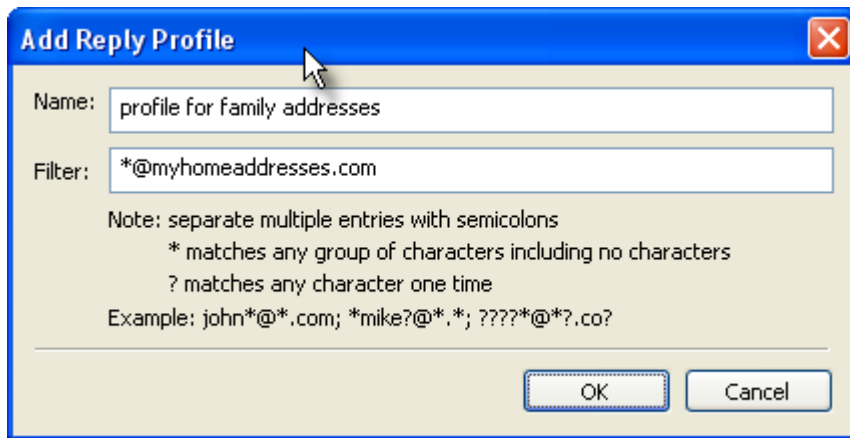
Starting from Bells & Whistles v3, the reply options are now grouped per profiles. What is a profile? On our program, a reply profile is a set of rules that determine to which email messages will Bells & Whistles apply the selected reply options.

For example, if you want to add your business signature to all email replies, except for the emails sent to your family, you can define the global profile ("everyone") to include your business signature, and then define another reply profile that will be active only for the email addresses of your family. This way, when you will reply to your family email addresses, the program will not include your business signature. By default, Bells & Whistles has a single profile that is defined to handle all email replies in the same way.

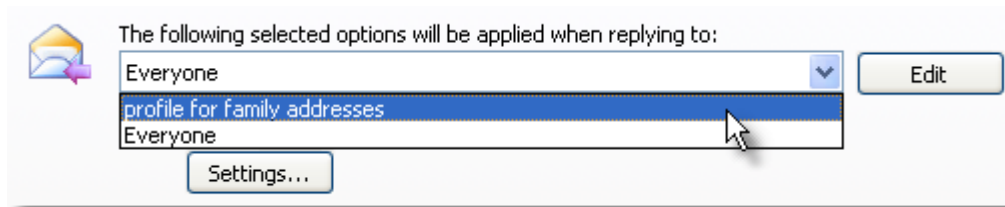
To add a new profile, simply click on the Edit button located on the right side of the profiles list:



Then, click on the Add button and design the new profile:



So, if you want to define separate reply rules for emails received from your family email addresses, simply enter these email addresses in the Filter field, give a name to the profile and click Ok to save it. Once you saved the profile, it will be visible in the profiles list, so you can define your special reply settings for this profile only:



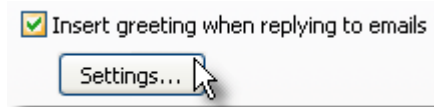
For each profile, the following reply options are available:

- [Automated greetings text](#);
- [Auto-number replies per subject](#);
- Auto-format the email reply body (plain text or html);
- [Include list of original attachments](#);
- [Include actual attachments from the original received message](#) ;
- [Automatically put replied addresses in your Contacts list](#);
- [Custom signature](#).

## 4.2 Reply Greetings

The Reply Greetings function allows you to create faster email replies, by automatically inserting a greeting into the reply that you are composing. So instead of typing "Hi John," the program will automatically insert this text for you. Neat, isn't it?

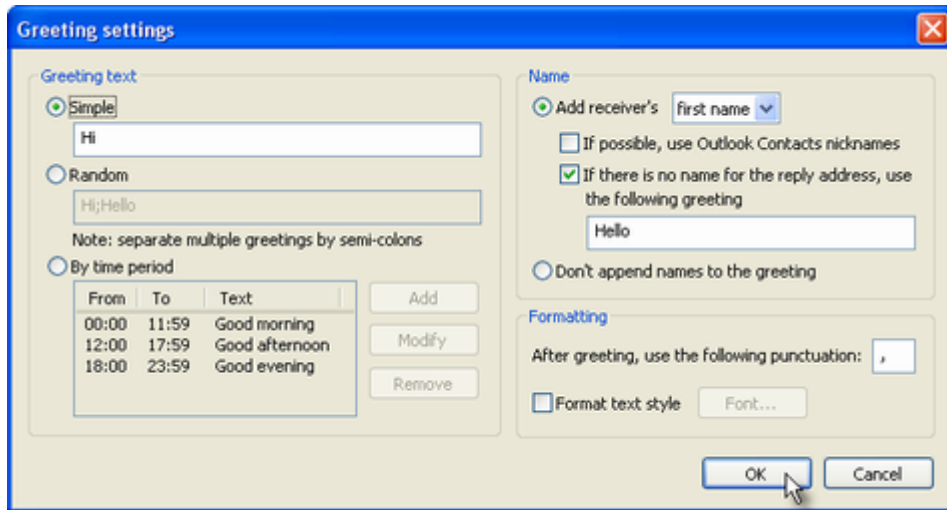
To enable the Reply Greetings function, simply check/mark the box "Insert greeting when replying to emails". To customize the greetings text, click on the Settings button:



On the greetings settings window, you can define various options for your greetings, such as:

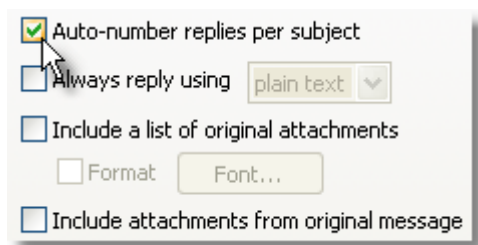
- the introduction greetings text (like "Hi" or "Hello" or "Dear"). You can even choose to let Bells & Whistles to pick up randomly a greetings text from a list of predefined texts;

- you can choose to use different greetings for different periods of the day. For example, in the mornings you can start your replies with "Good morning", while in the evenings you can automatically start replies with "Good evening";
- after the introduction text, you can let Bells & Whistles to include the name of the person for which you are composing the reply. This way, even if the greeting is fully automated, it will look and feel very personal. Bells & Whistles is taking the person's name from the Alias name of his/her email address;
- you can configure the font style of the greeting text. If you want to use the same format that was used on the email to which you are now replying, simply do not check/mark the box for using a certain text format.



### 4.3 Numbering Replies per Subject

To enable the reply subject counter, from the Reply Options menu section, enable the option "Auto-number replies per subject". Once this option is enabled, Bells & Whistles will add a reply number on the email subject, making it easier to track the history of an email exchange.



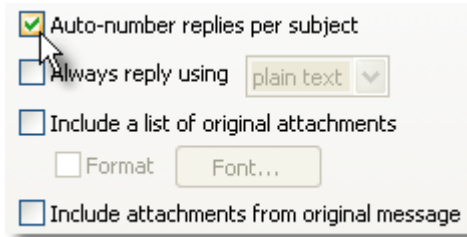
When this option is enabled, the subject of an email reply will be automatically formatted like this: "**RE: [X] Subject text**", where [X] is the reply number per unique subject.

### 4.4 Handling Attachments on Email Replies

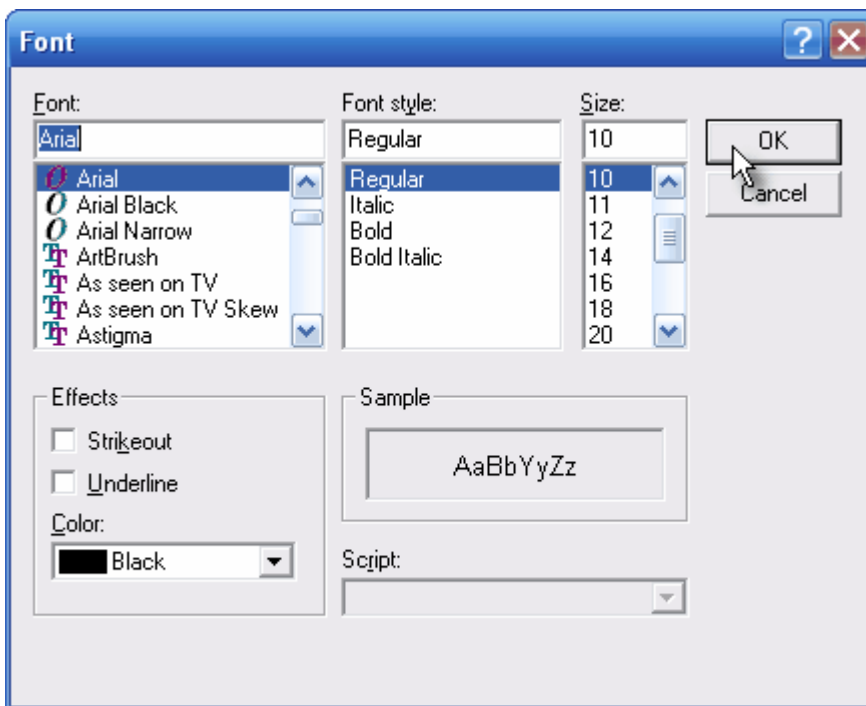
For better email management, Bells & Whistles allows you to include a list with the original file attachments of the email to which you reply and to include the actual attachments in the email reply.

To enable these features, on the Reply Options tab, you have to mark the checkboxes named "Include

a list of original attachments" and "Include attachments from original message":



To further customize the look of the attachments list, you can choose to pre-format the list font style, by enabling the "Format" option and selecting the desired font style using the "Font..." button:



## 4.5 Automatically Setting the Reply Format

Although Microsoft Outlook allows you to select a default email format when sending new emails, this setting does not apply when replying to email messages. By default, when composing a reply, Outlook will use the email format of the original email. Thus, no matter if your default format for new mail is set to "plain text", if you are replying to a HTML email, your own reply will be generated as a HTML email.

To increase your Outlook productivity, Bells & Whistles makes it very easy to specify a default email format even when sending replies. As a result, the selected format will be automatically applied on all your email replies, no matter the format of the original email.

To use this feature, you have to enable the option "Always reply using..." from the "Reply Options" section of the Bells & Whistles configuration screen, which can be launched from the Outlook -> Tools -> Bells & Whistles Options menu or from the Bells & Whistles toolbar displayed on the main Outlook window.

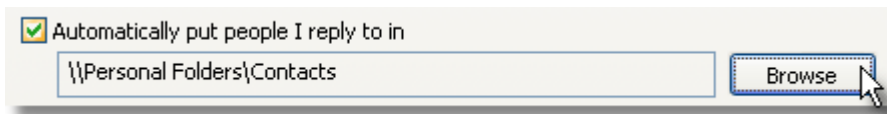




## 4.6 Adding Replied Addresses to Outlook Contacts

Earlier versions of Microsoft Outlook included a feature for automatically putting addresses in outgoing emails to the Outlook address book. Since the latest Outlook versions do not include this feature, Bells & Whistles comes with a similar function. This way, you can build your address book in a way that saves a lot of typing and trying to remember adding people as you reply to their messages.

To enable this feature, go to the Bells & Whistles Reply Options tab, then mark the checkbox called "Automatically put people I reply to in" then use the Browse button and select the desired Contacts folder where these contacts will be automatically added:



## 4.7 Email Signatures

Microsoft Outlook is delivered with its own email signature options, but these options don't offer you the freedom of the Bells & Whistles signatures feature. Using Bells & Whistles, on top of what Outlook can do with signatures, you can:

- define a signature for certain Contacts or email addresses, so you don't mix signatures for personal emails with signatures for business emails;
- compose the signature using a fully fledged HTML editor that allows you to insert images, hyperlinks on images or other objects in the signature.

To enable the Signatures feature, from the Reply Options menu section, enable the option "Insert signature" and click on the Edit button to compose the signature:



The signature editor is the same as the editor used for [text templates](#). All signatures will be saved into the Signatures category of the Text Templates. This category is only accessible by using the Edit button from under the "Insert signature" checkbox: you can't edit signatures by using the regular text templates editor.

The signature editor is very straight forward, as it resembles the text editor interface of Microsoft Word or Outlook.

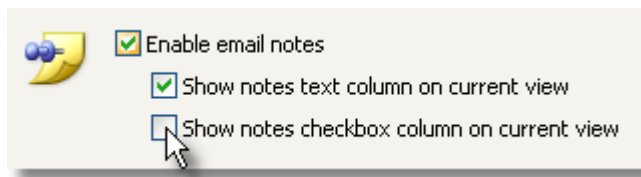
## 5 Alerts & Notes

### 5.1 Enabling the Notes Feature

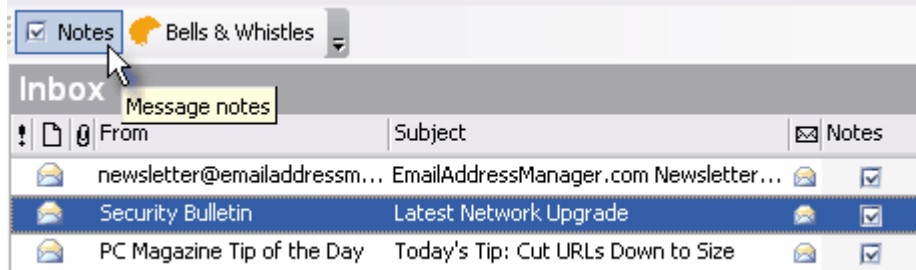
Bells & Whistles for Outlook introduces a new Outlook email concept: email notes attached to Inbox email messages.

The goal of this feature is to allow you to quickly record a text (comments, ideas, to-do, etc) within Outlook, while keeping it related to a certain email subject.

By default, [once installed](#) Bells & Whistles will enable this feature. You can manually enable/disable it, by going to the Alerts&Notes tab and marking the checkbox called "Enable email notes". You can also choose if the email notes sign is going to be displayed by Outlook, as a message property column:

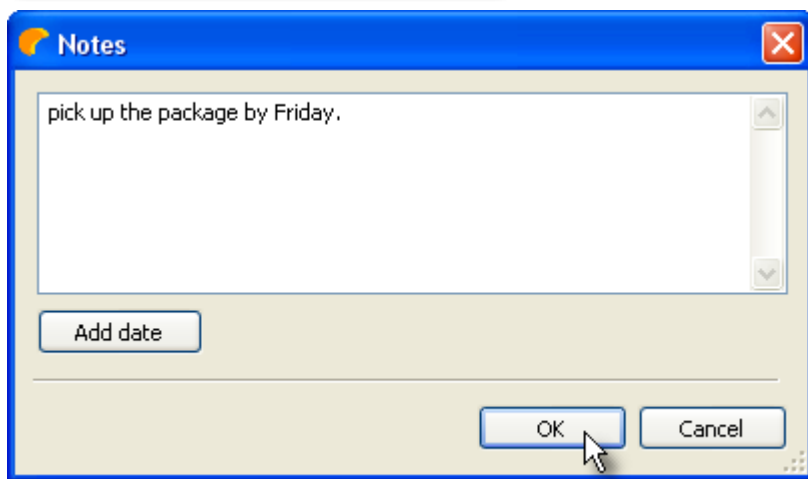
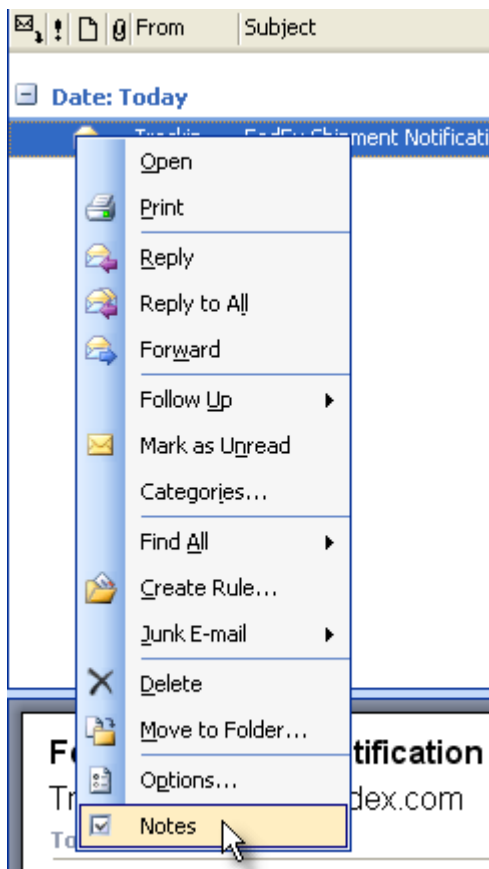


When this function is enabled, you will see a new button attached to the [Bells & Whistles toolbar menu](#) of Outlook. In order to insert an Email Note, simply select the desired email message and click on the "Notes" button from the toolbar. A new window will popup, so you can type the desired note:



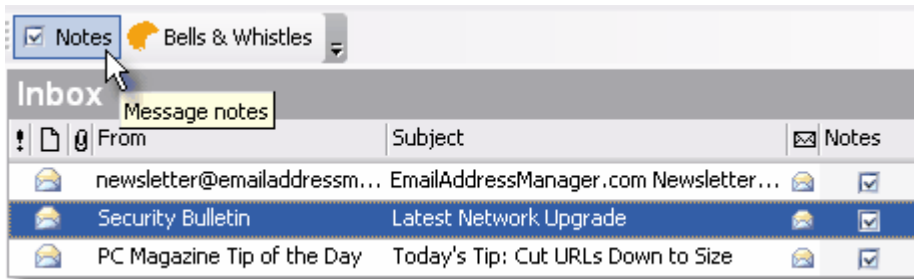
### 5.2 Working with Email Notes

As described on the Email Notes main help page, in order to insert an Email Note you simply have to right click on the desired email message and select "Notes" from the list. A new window will popup, so you can type the desired note:

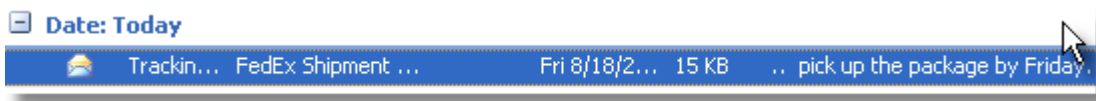


When you write your text, you can also attach a date stamp on it in order to help you remember when you actually added the note to that email message. Then, just click on the "OK" button and Outlook will save the note, attached to the selected email message.

To quickly sort Inbox email messages based on their Notes, Bells & Whistles inserts a new message column view, called Notes:

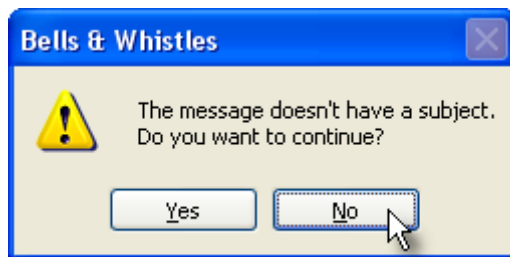


When a note is attached to an email, you will see a checkbox added to the Notes column of that email message. You can also [configure Bells & Whistles](#) to display the actual note text in the column, instead of the notes icon:



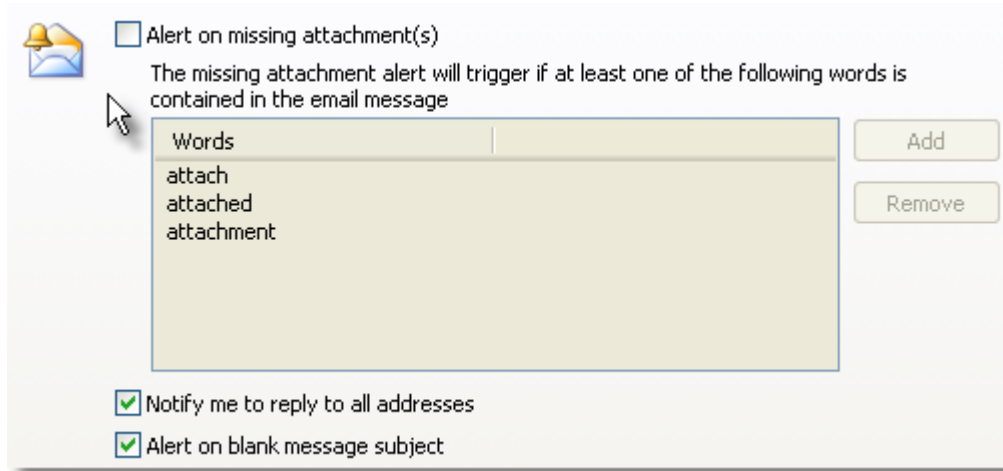
### 5.3 Using Alerts

Bells & Whistles can save you from a lot of trouble and unpleasant situations, by notifying you with alerts whenever you forget to attach a file, to enter an email subject or to reply to all email addresses that were put on the original received email.



To enable these alerts, open the [Bells & Whistles configuration window](#) (from the Outlook Tools menu) and you will see a tab section called "Alerts". You can choose to enable both the subject and the missing attachment alerts or you can enable only one of them.

If the missing attachment alert is enabled, then by clicking on the Settings button, you can define custom words that will trigger the missing attachment alert. Whenever you want to send a new email, Bells & Whistles will silently scan the email for missing attachment trigger words and, if one of them is found, it will popup the alarm. Bells & Whistles will always look for these words only on the text section that you composed, so it will skip previous replies or forwards.

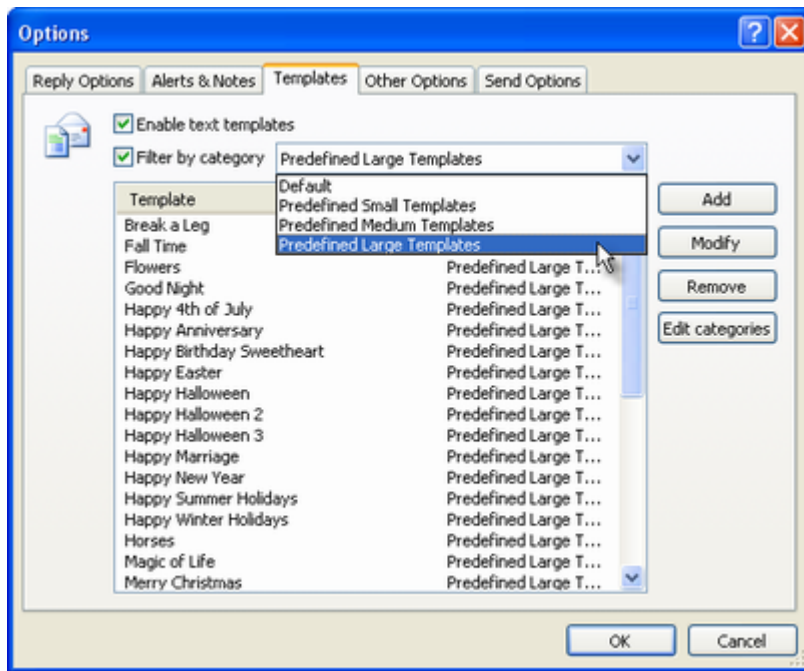


## 6 Email Templates

### 6.1 Explaining the Templates tab

The goal of the Templates feature is to allow Outlook users to quickly insert blocks of text into email messages, without having to type that text over and over again. For example, if you work as a sales representative and you have to type the product payment terms over and over again for various customers, it would be a lot easier to simply define the payment terms as a text template and then to insert it into an email message with a single mouse click.

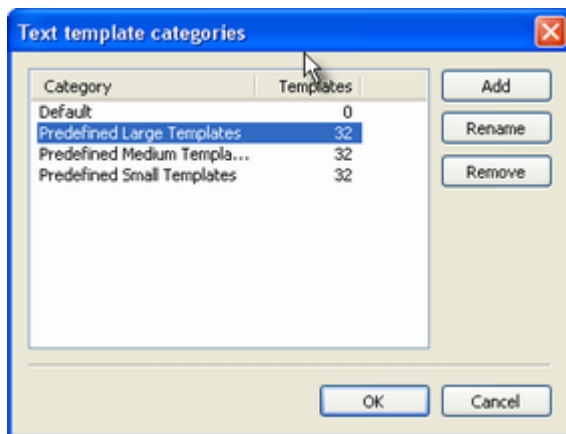
The Templates tab can be accessed from the [Bells & Whistles options window](#). By default, when Bells & Whistles is installed, the templates feature is enabled. Also, starting with v3 of Bells & Whistles, the program is delivered with over 30 predefined templates that are surely handy for sending nice emails to your friends & family. The predefined templates are grouped in three categories: small, medium and large templates.



## 6.2 Working with Categories

To make it easier for you to manage templates, Bells & Whistles allows you to create and manage template categories. This way, you can have a category for business templates and a different category for personal templates.

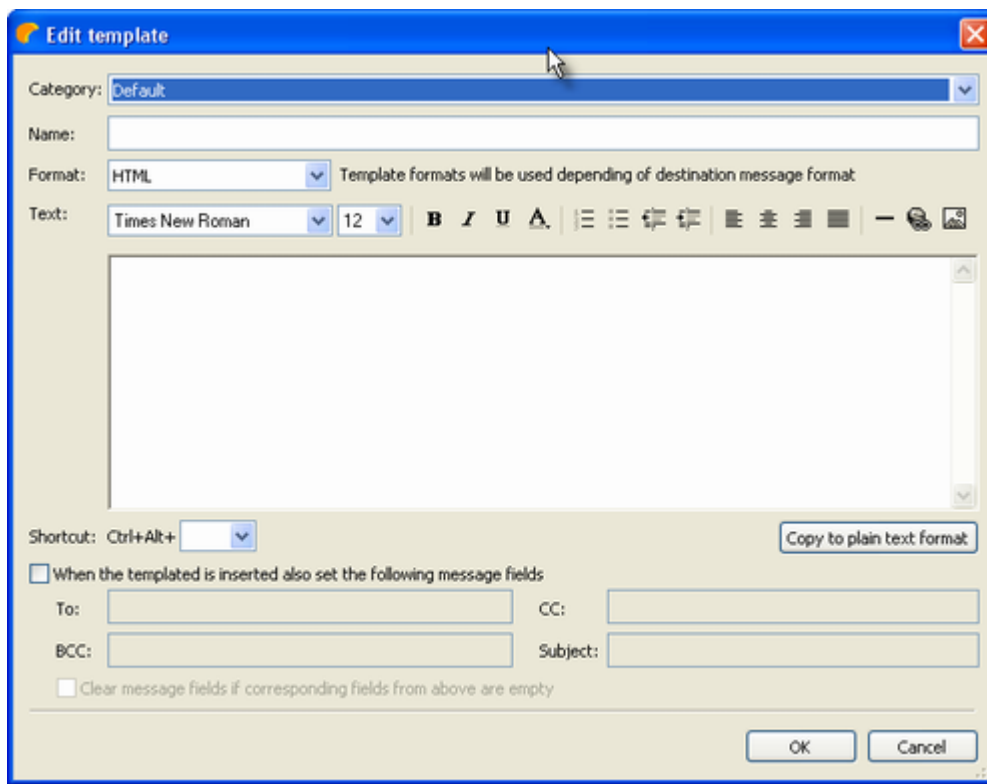
To add, remove or rename template categories, simply click on the "Edit categories" button from the Templates tab:



## 6.3 The Template Editor

The template editor allows you to create new templates for your emails. From the Templates tab, you can choose to add, modify or remove a template.

In order to add a new template, click on the Add button and the template editor will open:



The template editor interface depends on the template format type: HTML or plain text. We will further explain the usability of the HTML templates editor, as the plain text editor is very simple & straight forward. Moreover, once you define a HTML template, you can easily copy it as a plain text template, by clicking on the "Copy to plain text format" button displayed just below the HTML text editor frame.

The HTML template editor pretty much resembles the standard Microsoft editor for rich text or HTML, like Microsoft Word. The editor interface is composed by the following sections:

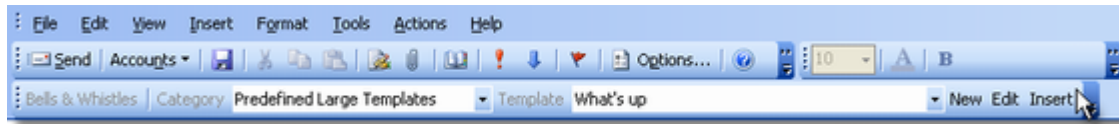
- **Category:** using the provided dropdown list, you can choose the template category to which the new template will belong to. To manage categories, you need to exit the templates editor and click on the "Edit categories" button located on the Templates tab;
- **Name:** to make it easy for you to remember what the template is about, you have to enter a name for each template. These names will be visible on your Outlook email editor window, so you can quickly choose and insert the desired template;
- **Format:** using the format option, you can switch between HTML and plain text templates;
- **Text:** the text section is composed by several HTML editor functions, allowing you to specify the text font, size, colour, other text properties, alignment, numbering, etc. You can also insert images into a text template and you can create hyperlinks over text, images or other HTML objects;
- **Shortcut:** using provided the dropdown list, you can choose a shortcut combination (Ctrl + Alt + any letter/number) that will allow you to quickly insert a template into an email message, simply by using the shortcut keyboard combination;

Not only that you can define templates for the email body content, but you can also attach other email properties to each template. For example, you can configure a template so it will automaticall fill the To, CC, BCC or Subject fields whenever the template is inserted.

When you are done editing a template, click on the OK button to save it. You can now [use & insert the template](#) into Outlook emails.

## 6.4 Inserting a Template into Emails

Using Bells & Whistles for Outlook, you can [create templates or use predefined templates](#) for Outlook emails. To insert a template into an email message, simply edit the email as you used to do. While you are using Outlook to compose the email message, you will notice a new toolbar displayed on the Outlook editor window:



The templates toolbar has 5 functions:

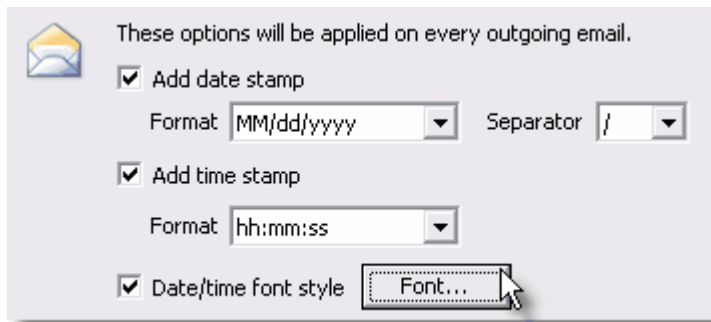
- using the first dropdown list, you can select the templates category from which you wish to insert a template;
- using the second dropdown list, you can browse the template names and select the desired template to be inserted into the email content;
- using the "New" button, you can start building a new template, without having to go to the main Outlook window and enter the Bells & Whistles options window. This way, if you notice that a block of text repeats itself as you are typing it, you can simply select it, copy to clipboard, then use the New button to transform it into a text template for later use;
- using the Edit button, you can edit the selected template;
- using the Insert button, you can insert the selected template into the email content. The template will be inserted exactly in the position where the text cursor is positioned within your email text content.

## 7 Other Options

### 7.1 Add Date/Time Stamps

Adding date and time stamps to emails may seem obsolete, as your email client and mail servers are anyway adding these stamps to email headers during the email delivery process. However, for your further email processing and handling needs, especially when dealing with public or shared mail folders, Bells & Whistles allows you to automatically add date and time stamps on every outgoing email.

To add these stamps, simply open the [Bells & Whistles configuration screen](#) (under Outlook -> Tools), go to the "Other Options" tab and enable the date and/or time stamp options.



Once these options are enabled, Bells & Whistles will auto-insert stamps within the email message content, every time when you will send out a new email, reply or forward message.

To further customize the look of these stamps, you can choose the desired time & date format and you can format the font style of these stamps.



## 7.2 Using Email Tracking IDs

In order to increase your productivity while using Outlook, Bells & Whistles can add subject tracking IDs to every outgoing email message. To enable this option, simply open the Bells & Whistles configuration window, then go to the "Other Options" tab and mark the checkbox called "Add tracking ID on every message thread":



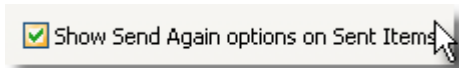
By default, Bells & Whistles will start counting IDs from 100000, but you can choose to start counting from a different number, by inserting that number on the counter text box. You can also use a prefix for the counter: this way, if you have multiple Bells & Whistles users, you can make a difference between tracking ids issued by user A and user B, based on their prefix.

## 7.3 Send Again Options

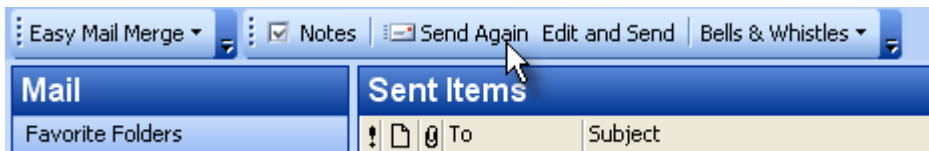
The Send Again options are one of the brand new features of version 3 of Bells & Whistles for Outlook. This feature was requested by several Outlook users, in order to fill the following demand: if you composed and sent an Outlook email, how can you later re-edit it and send it again? Without this new feature of Bells & Whistles, your only solution is create a new email, then copy the To, CC, BCC addresses, the email subject and the email text of the sent email, then send it again.

Let's put it like this: it often happens you send an email, but the receiver claims the email was never received. Using the Send Again feature, you can quickly resend the email, saving you from wasting a lot of time copying the original email fields into a new email and resending it.

To enable the Send Again features, you need to check/mark the box for "Show Send Again options on Sent Items".

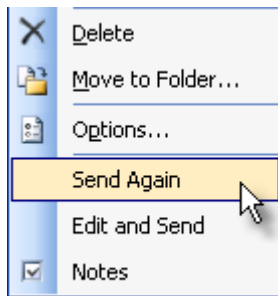


When this option is enabled, you will notice a new toolbar menu displayed in your Sent Items folder:



To resend an email, simply select it from your Sent Items list, then click on the Send Again button (it will automatically put the same email in the Outbox folder, ready to be sent by Outlook) or on the Edit and Send button (it will open an email compose window with the email to be sent, allowing you to do changes on the email content).

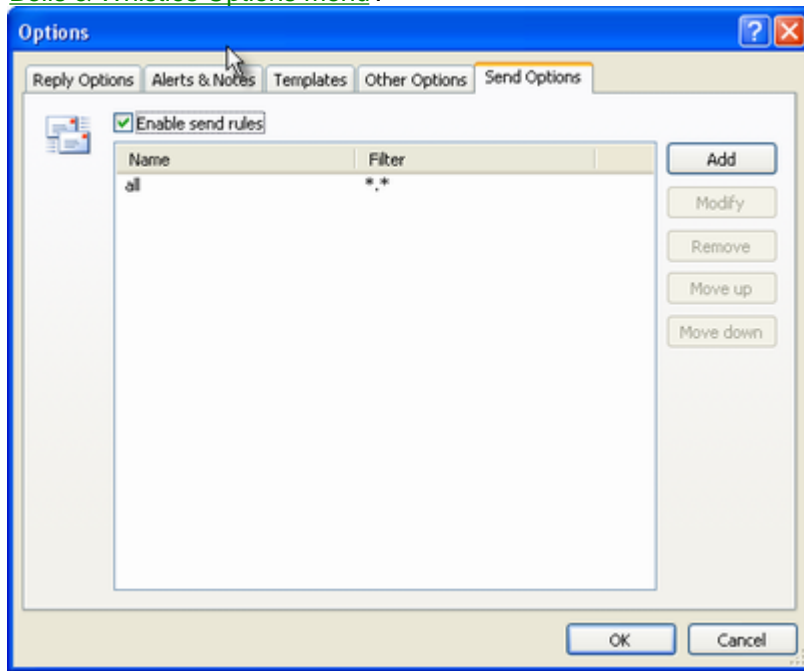
You can also access these two options by right clicking on the desired email message from the Sent Items folder:



## 8 Send Options

### 8.1 Send Options Tab

The Bells & Whistles Send Options are a group of functions designed for helping you to increase your productivity when sending Outlook email messages. The Send Options tab can be accessed from the [Bells & Whistles Options menu](#) :



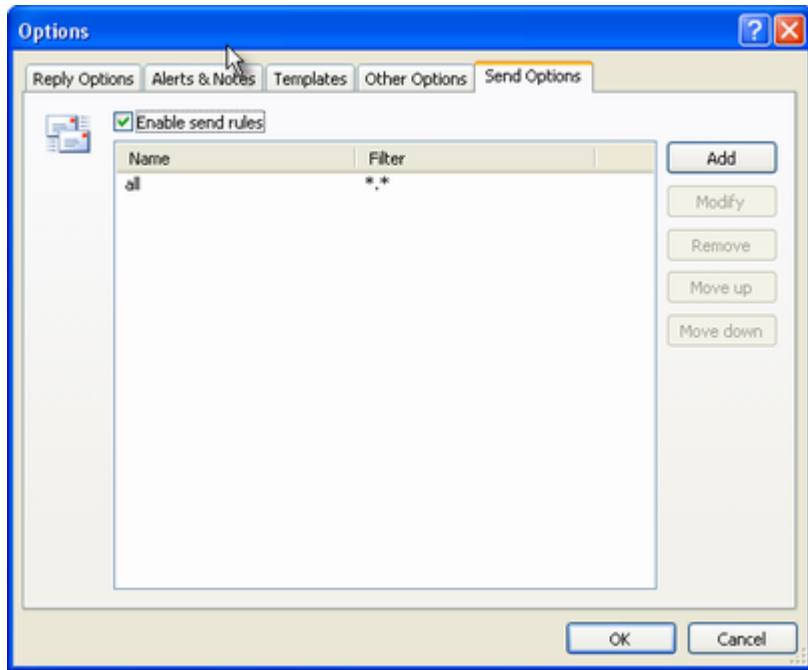
To activate the send options, please make sure that the checkbox "Enable send rules" is marked. Once this option is marked/enabled, you can add [rules](#) for sending Outlook emails.

### 8.2 Using Send Rules

By default, Bells & Whistles is delivered with a universal rule that is applied to all outgoing emails. If you wish to exclude certain messages or to define other rules for certain messages, you can add a new rule (or a set of rules). Each new rule will be placed on top of existing rules, making it to apply firstly. So, if two or more rules theoretically apply to a given email message, only the first rule that meet the criteria will be used by Bells & Whistles. To change the priority of each rule, select the desired rule and use the "Move up" and "Move down" buttons to move it on the rules list. The more on top it is

placed, the more priority it has.

To add a new rule, click on the Add button located on the right side of the rules list:

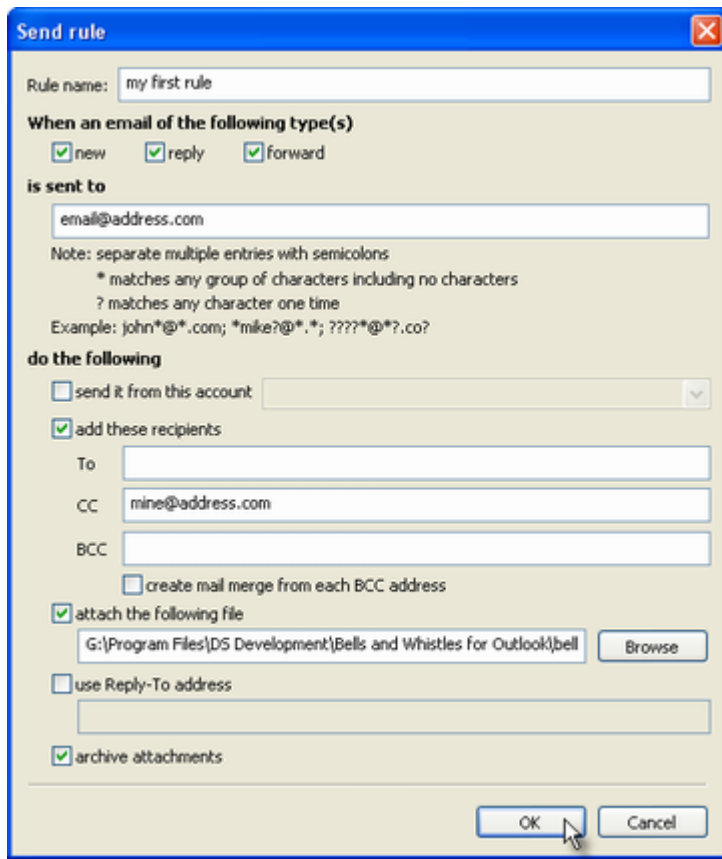


Once you clicked to add a new rule, the rule options window will open, allowing you to specify the [rule criteria and actions](#).

### 8.3 Explaining Rule Actions

The Rule Actions window gives you two major functions:

1. to specify the criteria based on which the rule actions will be activated;
2. to specify the actions that are going to be performed by Outlook, when the rule criteria is met.



The first half of the rule actions window allows you to define the rule criteria. You can enter a name for your rule and you can specify when exactly the rule should be activated: when an email message is going to be sent (as a new mail, reply or forward) to a specified email address (or to a specified set of addresses).

The rule actions are diverse, as you can choose to:

- automatically have Outlook to send the email message through a specified email account without having you to always manually select the desired outgoing email account (so the rule action can be resumed as: "if I send an email to Mr. X, then always send it via by business email address");
- automatically add certain receipts (email addresses) to the outgoing email message (so the rule action can be resumed as: "if I send an email to Mr. X, then always add the following email address to the To, CC or BCC fields");
- automatically attach a file to the outgoing email message - if this action is enabled, you have to use the Browse button to specify the path to the desired file to be attached;
- automatically configure the outgoing email message so it is using a reply-to email address different from the one that is used for sending the email (so the rule can be resumed as: "if I send an email to Mr. X, then configure the message so Mr. X will reply to the following email address");
- archive attachments on outgoing email messages: if this action is enabled, Bells & Whistles for Outlook will always compress the attachments found in outgoing email messages. Practically, if you attach a BMP file to your message, the receiver will receive the message with a ZIP attachment, containing the BMP file. This way, you can significantly decrease the attachment size, making it faster to be sent and delivered.

Mail merging from Outlook always use to be a pain, as you must deal with Outlook distribution lists, Outlook Contacts and MS-Word.

Bells & Whistles for Outlook makes it very easy, by converting the BCC field to a mail merge field. As a

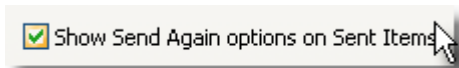
result, in order to avoid sending emails with multiple CC, BCC or TO addresses and to quickly generate messages with unique TO fields, you must enable the Bells & Whistles BCC mail merge option and Outlook will fire one email for each address added to the BCC field of a composed message.

## 8.4 Send Again / Edit & Send Again

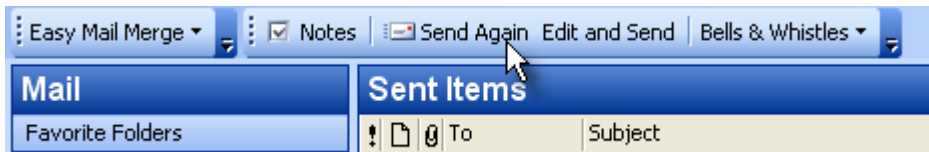
The Send Again options are one of the brand new features of version 3 of Bells & Whistles for Outlook. This feature was requested by several Outlook users, in order to fill the following demand: if you composed and sent an Outlook email, how can you later re-edit it and send it again? Without this new feature of Bells & Whistles, your only solution is create a new email, then copy the To, CC, BCC addresses, the email subject and the email text of the sent email, then send it again.

Let's put it like this: it often happens you send an email, but the receiver claims the email was never received. Using the Send Again feature, you can quickly resend the email, saving you from wasting a lot of time copying the original email fields into a new email and resending it.

To enable the Send Again features, you need to check/mark the box for "Show Send Again options on Sent Items".

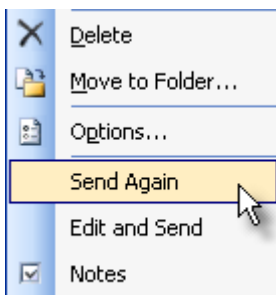


When this option is enabled, you will notice a new toolbar menu displayed in your Sent Items folder:



To resend an email, simply select it from your Sent Items list, then click on the Send Again button (it will automatically put the same email in the Outbox folder, ready to be sent by Outlook) or on the Edit and Send button (it will open an email compose window with the email to be sent, allowing you to do changes on the email content).

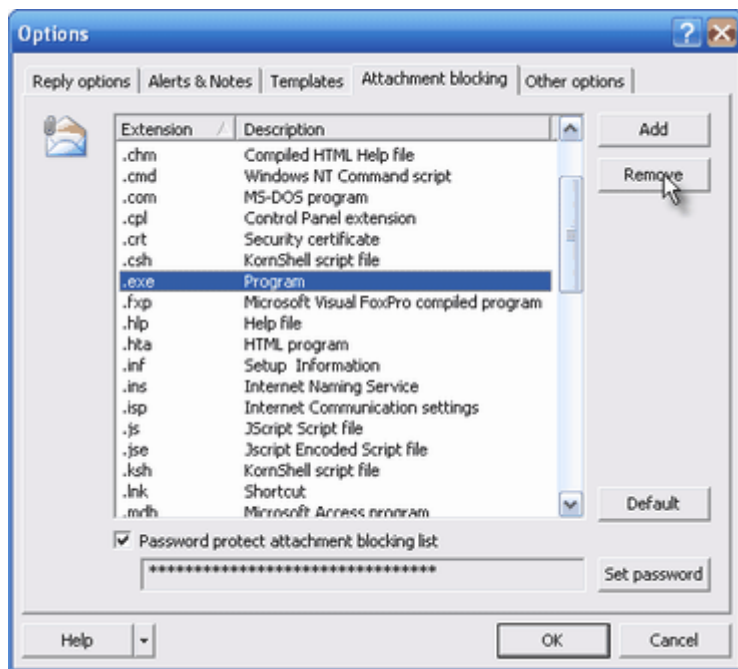
You can also access these two options by right clicking on the desired email message from the Sent Items folder:



## 9 Attachment Blocking

By default, Microsoft Outlook will prevent you from opening certain file attachments that can damage your computer, by containing malware code. However, sometimes you need to be able to handle these attachments (for example Word or Excel files).

Bells & Whistles offers you the ability to easily decide which file attachments you can trust, by managing the file extensions for the blocked attachments. To customize the attachment blocking list, open the Bells & Whistles menu, then select the "Attachment Blocking" menu option:



For example, if you want to be able to receive and open EXE files, simply select the EXE extension from the attachment extensions list and click on the "Remove" button.

For security reasons, you can password protect this list, so only you can decide which attachments to trust and which to block. To enable the password protection, simply mark the checkbox "Password protect attachment blocking list" then insert your desired password. Next time when you will want to alter the list, you will be asked to input the password firstly.

**If a file extensions was added/removed from the list, you will have to restart Outlook for the changes to take effect.**

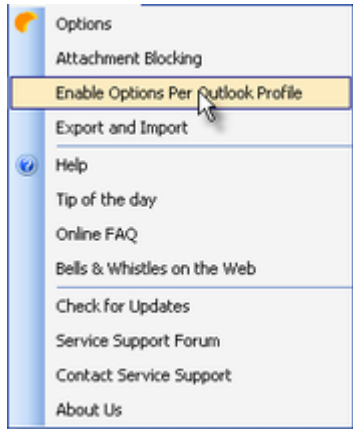
## 10 Using Options per Outlook Profile

When Bells & Whistles is installed, by default it will save and use the same Bells & Whistles options for all Outlook profiles. So, even if you have 3 separate Outlook profiles, Bells & Whistles will use the same settings for all your profiles.

However, you can switch Bells & Whistles to use separate settings for each Outlook profile. This way, for example you can have a set of text templates for an Outlook profile, and a different set of templates

for another Outlook profile.

To enable this feature, simply go to the main menu of Bells & Whistles, then click on "Enable Options per Outlook Profile":

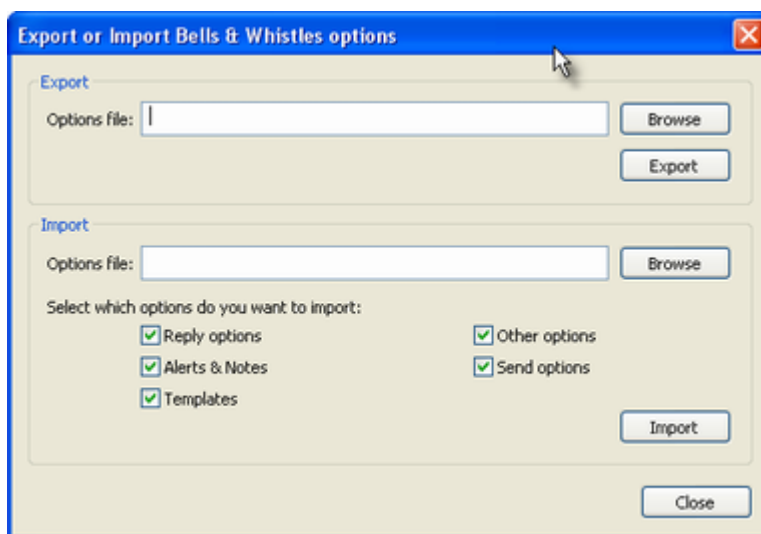


You will have to restart Outlook in order to allow Bells & Whistles to activate this feature.

## 11 Export & Import Settings

The Export & Import Settings feature is designed so you can move or copy Bells & Whistles settings, templates and rules from one computer to the other. So, if you defined a set of 50 templates on your business desktop computer, you can easily copy them to your notebook computer by exporting them from your desktop pc and importing them on your notebook. Bells & Whistles is saving your options and files as a single file with the BWO extension.

To backup or to move your Bells & Whistles settings from a computer, click on the Browse button from the Export frame, select the path where the BWO options file will be saved, then click on the Export button:



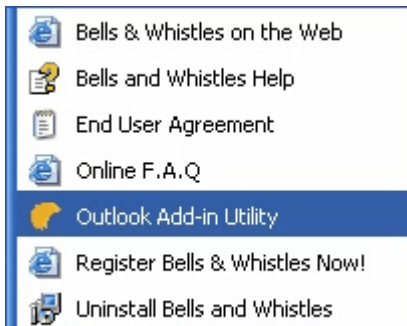
To load or import an options file, click on the Browse button located on the Import section and specify the path to the .BWO file. You can choose to import all settings or to import only certain settings: reply options, alerts & notes, other options, send options or templates. When you are ready to import the

settings, click on the Import button.

**Please note that, by importing a Bells & Whistles options file, you are overwrite your existing Bells & Whistles options.**

## 12 Using the Outlook Addin Utility

The Outlook Add-in Utility is a bonus utility of the Bells & Whistles package for Outlook and it can be installed by downloading and doing a complete installation of Bells & Whistles for Outlook. Once [installed](#), you can run it from the Bells & Whistles program group:



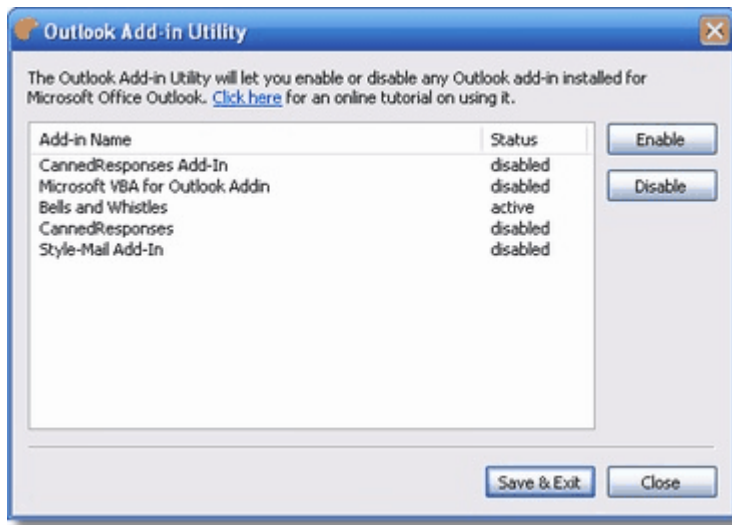
**The goal of our Add-in Utility is to give you a user-friendly solution for handling Outlook Add-ins. Unfortunately, some 3rd party add-ins simply don't list themselves on the Outlook COM Add-in section and so you would not be able to disable them using the standard Outlook interface.**

Also, if an Outlook Add-in is causing Outlook to fail while trying to start, then you will not be able to use the Outlook builtin add-in manager.

Once loaded, the Bells & Whistles Outlook Add-in Utility will display a clear list of installed Outlook add-ins. This list contains both enabled and disabled add-ins. If the Outlook add-in status is "Active", it means the related add-in is enabled while you try to start Microsoft Outlook. If the status is set to "disabled", it means the related add-in is not going to be loaded when Microsoft Outlook starts.

The enable or to disable an Outlook add-in, simply select it from the add-ins list and click on the Enable or Disable button. You will notice that its status will change. To apply this change, you will have to restart Microsoft Outlook.

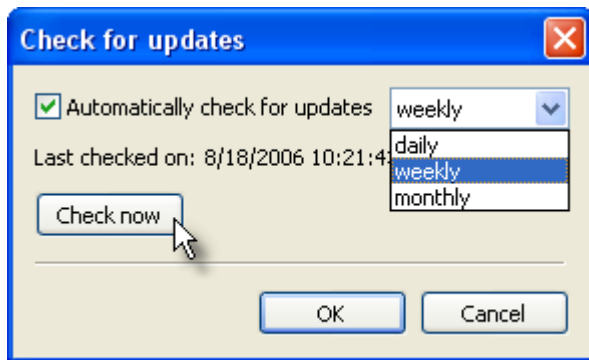




System Requirements: Microsoft Office Outlook 2000, 2002 (XP), 2003 / Outlook 2000, 2002 (XP), 2003.

## 13 Checking for Product Updates

Bells & Whistles v3 comes with its own live update module, allowing you to easily check for updates on the program. By default, the program will check for updates weekly, but you can change this setting and you can manually check for updates whenever you want. The "Check for Updates" function is located on the [Bells & Whistles menu](#) displayed on the main toolbar area of Outlook:



If an update is found on our server, the program will ask you if you want to download & install the update. Once the download is completed (a download icon is displayed on your systray icons area, showing you the download progress), it will automatically start [the install process](#). Please make sure Outlook is not running while performing the update installation.

- If you install an update on a registered version of Bells & Whistles and if it is a minor update (like updating from v3.01 to v3.2), the licensing engine should automatically find and use the existing license, without asking you to re-activate your license.
- If you install an update on a non-registered (trial) version of Bells & Whistles or if you are performing a major upgrade (like upgrading from v1 to v3), then the licensing engine will prompt you to try the new version, to buy a license or to activate it. If you consider that the Try/Buy/Activate screen is displayed by mistake, then please [contact us](#) with your license details and we will promptly assist

you.

## 14 Frequently Asked Questions

### 14.1 How Do I Print This Help File?

We do not recommend that you print directly from the Microsoft help viewer because the quality is poor.

You can also download and print the entire online help in PDF format from here:  
<http://www.emailaddressmanager.com/helpdesk.html>

### 14.2 Does It Work with Outlook Express?

Bells & Whistles is designed for **Microsoft Outlook** and it functions as an add-in for Outlook. As a result, Bells & Whistles does not support Outlook Express.

### 14.3 Does It Work with Any MS-Office Regional Version?

Bells & Whistles is designed for any Microsoft Outlook regional (language) version, including but not limited to the English, German, Dutch, Italian, French, Russian, Romanian versions.

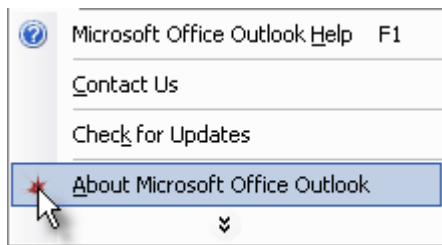
### 14.4 Can I Use It with MS-Exchange?

Bells & Whistles is designed to work as an add-in for Microsoft Outlook. If you are using Microsoft Outlook as a client for Microsoft Exchange, then Bells & Whistles will work just fine.

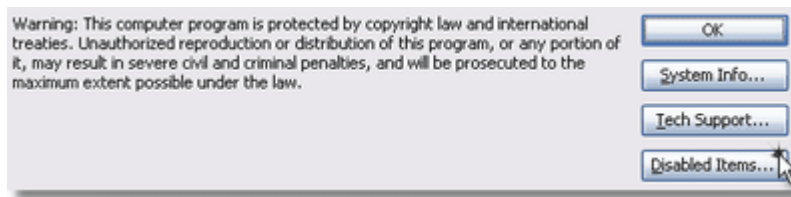
### 14.5 Outlook Disabled Bells & Whistles, What Now?

If, for some reasons, Microsoft Outlook disabled the Bells & Whistles add-in, you can always enable it back.

To enable it, go to the **Outlook Help** menu, then click on the option "About Microsoft Office Outlook":



The Microsoft Outlook About window will open: from the bottom section, click on the "**Disabled Items...**" button:



Then, select Bells & Whistles from that list and click on the "**Enable**" button. You will have to restart Outlook in order to apply the changes.

## 14.6 Why JPEG or RAR Files Are Not Compressed?

The attachment compression feature is using the ZIP archiving technology to compress attached files on outgoing emails. To avoid unnecessary compressions, Bells & Whistles is ignoring files for which the compression would not decrease the file size, such as Rar, JPEG, PNG or already zipped files.

## 14.7 Any Known Conflicts with Other Outlook Addins?

As far as we can tell, there are no known conflicts with 3rd party Outlook addins, as long as these addins do not seriously change the interface functionality of Microsoft Outlook.

Also, no problems were found when testing on Windows systems running:

- any popular antivirus software;
- any popular anti-spy or anti-spam software.

For further information, please check our [dedicated forum topic](#) on this subject. Thank you.

# Index

## - A -

actions 26  
 add 25  
 add date and time stamps 23  
 Add-in 31  
 Add-in Utility 31  
 Address Collector 4  
 alerts 19  
 Alerts&Notes 17  
 archive 26  
 archive attachments 26  
 archiving technology 34  
 attachment 34  
 attachment alerts 19  
 Attachment Blocking 29  
 attachment compression 34  
 attachments 29  
 Auto Reply 4  
 auto-insert stamps 23  
 automatically add certain receipts 26  
 automatically attach a file 26  
 automatically configure 26  
 Automatically put people I reply 16  
 Auto-number 14

## - B -

backup 30  
 Basics 10  
 Bells & Whistles 9  
 Benefits 7  
 blocked attachments 29  
 blocks of text 20  
 build your address book 16  
 Buy 5

## - C -

Categories 21  
 Check for Updates 32  
 compress 34  
 Conflicts 34

Contact 3  
 Contacts folder 16  
 counter text box 24  
 criteria 26

## - D -

Date/Time Stamps 23  
 default email format 15  
 disabled 33  
 Disabled Items 33  
 Discounts 6  
 DS Development 3  
 Dutch 33

## - E -

Edit and Send 24  
 Edit categories 21  
 Email Note 17  
 email notes 17  
 email signature 16  
 Email Tracking IDs 24  
 enable 33  
 Enable email notes 17  
 Enable Options 29  
 Enable send rules 25  
 English 33  
 Exchange 33  
 Export 30

## - F -

file attachments 14, 29  
 file extensions 29

## - G -

German 33  
 greetings settings 13

## - I -

ID 24  
 Import 30  
 Include attachments from original message 14

Insert 23  
insert a template 23  
Insert signature 16  
install 9  
installation 9  
Italian 33

## - J -

JPEG 34

## - L -

Licence Holder Name 8  
license 5, 8  
license activation 8  
license activation errors 8  
list of original attachments 14  
load 30

## - M -

Mail Merge 4  
Microsoft Exchange 33  
Microsoft Outlook 33  
move 30

## - N -

new rule 25  
new template 21  
new templates 21  
Notes 17  
Notes column 17

## - O -

Options menu 10  
Outlook 4  
Outlook Add-in 31  
Outlook address book 16  
Outlook Express 33  
Outlook Profile 29  
Outlook profiles 29

## - P -

Payment 6  
PNG 34  
predefined templates 20  
prefix 24  
print 33  
problems 34  
programming services 3  
Protection 7  
purchase 5  
Purchase Reference 8

## - R -

Refund 7  
re-install 8  
Reply Format 15  
Reply Greetings 13  
reply number 14  
Reply Options 11  
Reply Profiles 12  
reply subject counter 14  
Requirements 9  
Rule Actions 26

## - S -

Security 7  
Send Again 24  
Send Options 25  
Send Options tab 25  
Send Rules 25  
Sent Items 24  
service support 3  
Settings 30  
Show Send Again 24  
signature editor 16  
signatures 16  
Signatures feature 16  
specified email account 26  
subject tracking 24

## - T -

template 23

template categories 21  
template editor 21  
Templates 20  
Templates feature 20  
Templates tab 20  
time stamp 23  
tracking ID 24

## - U -

uninstall 11  
Uninstalling 11  
update 9  
updates 7, 9, 32  
Upgrades 7  
User Interface 10

## - V -

Volume 6

## - Z -

ZIP 34