

# User Guide


## LuckyAudit Html Email Add-In for Outlook2007/2010

Version: 2011.11

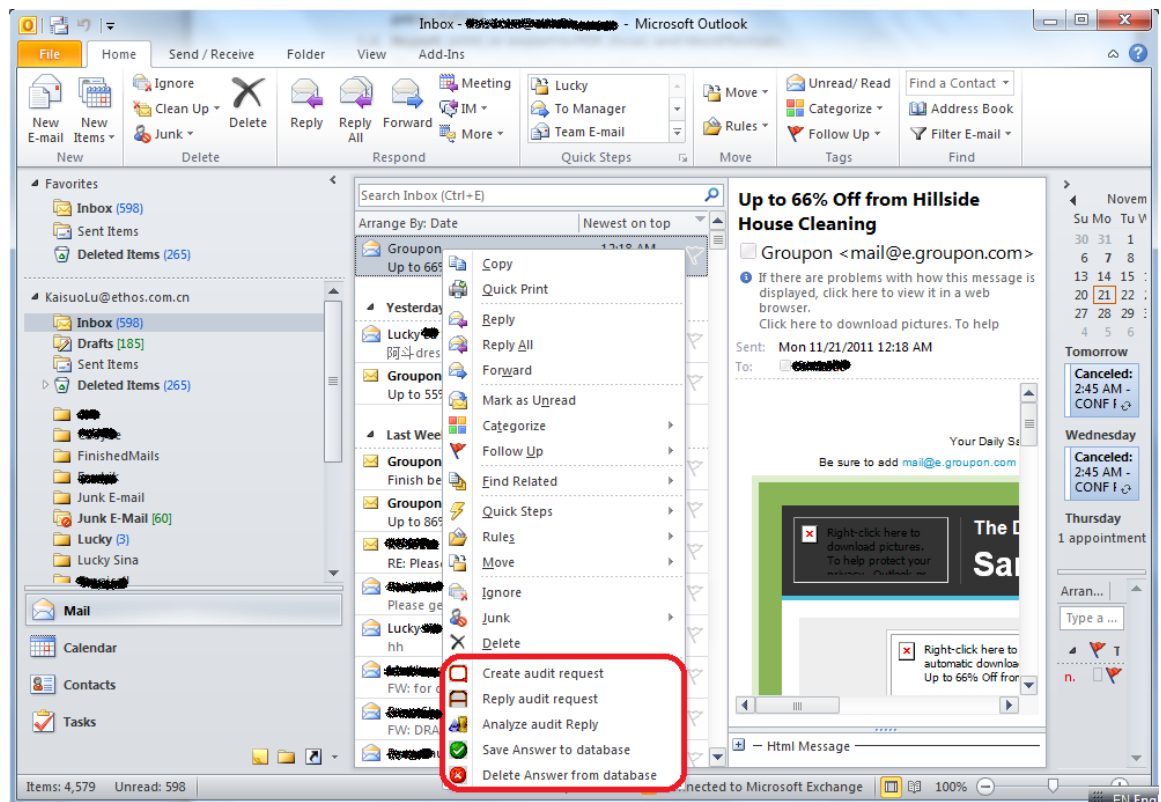
Lucky Lu

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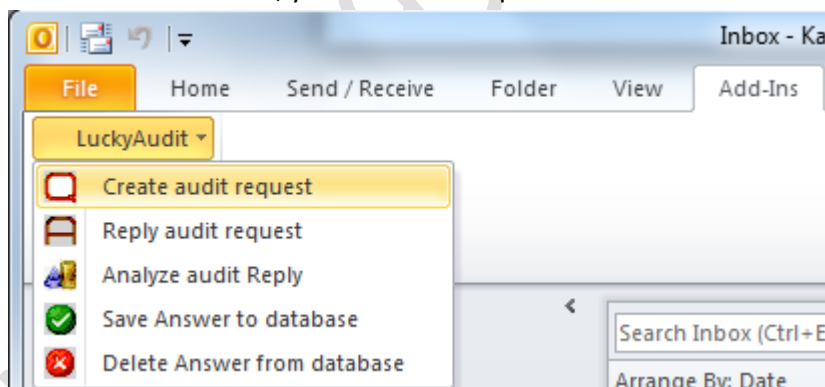
1. Top **benefits** of LuckyAudit Outlook Add-In.
  - 1.1. **Create** html email easily, powerfully, and fast by simplified complex html elements grouped input.
  - 1.2. **Present** html email like a web page, more visually appealing.
  - 1.3. **Edit, interact**, and **send** beautiful and familiar html emails easily and quickly.
  - 1.4. **Save** and **capture** the request questions on receiving (automatically, of course you can manually).
  - 1.5. Automatically **organize** questions, answer options, and answers for easy access and presentation.
  - 1.6. **Report**, print, or export to PDF, Excel, and Word formats.
  - 1.7. **Show** public and local pictures with your html email.
  - 1.8. **Decorate** Outlook with html content under Outlook security and functionality solution.
2. Prerequisites
  - 2.1. MS Outlook 2007/2010.
  - 2.2. .Net Framework 4 need to be installed. ([Download from Microsoft web site.](#))
3. Installation.

Installation is pretty easy; you just need to click  **setup.exe** to install it automatically.
4. Display Html email.
  - 4.1. Start.

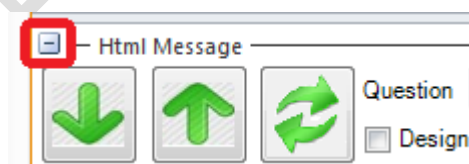
On any mail, right click to pop up operation menu.




Or from Add-Ins menu, you can start to operate.



If you want to see original outlook email content, just minimize this add-in by clicking below red boxed button.



And if you want to see html email content, you just need to click  **Html Message** to display this add-in and you can update content between original and html.

- 4.2. An html email is displayed in LuckyAudit editor, it's really beautiful, and html style as what you are familiar with. Look as below, the appearance is amazing in Outlook.

Question: Do you agree ...?

☐ Design Mode   QuestionType: RadioBox   Count: 4

Send Html Email   Insert Question

From the apprearance, which one is best?

☐ Html email displayed in Outlook.

☒ Html email displayed in LuckyAudit Add-In.

☐ Not sure.

If let you select a html email render for Outlook, which do you want to select?

☐ IE html render.

☒ MS Word render.

☐ Both.

Do you have any good ideas?

Why do I select MS Word render?

--Security, User experience,Performance, and etc.

Some time, we need Html mail displayed as they should be. So, on this time. we select this Add-In.

A Lucky.

- 4.3. The same html email presented in Outlook, it's really ugly.

**Html email with image test.**

Sent: Wed 11/2/2011 4:09 PM

To:



From the appearance, which one is best?

☐ Html email displayed in Outlook.

☒ Html email displayed in LuckyAudit Add-In.

☐ Not sure.

If let you select a html email render for Outlook, which do you want to select?

☐ IE html render.

☒ MS Word render.

☐ Both.

Do you have any good ideas?

Why do I select MS Word render? --Security, User experience, Performance, and etc.

Some time, we need Html mail displayed as they should be. So, on this time. we select this Add-In.



Lucky.

**4.4. Display your created or received html emails with Web-Standard.**

4.4.1. When you create a new html email, use LuckyAudit Add-In, you can easily and quickly produce beautiful and high qualified html email.(we will describe in beneath)

4.4.2. When you receive a new html email, directly update to LuckyAudit Add-In region to display, it will present as you want.



Just click this to Update html content from Outlook Message box to LuckyAudit editor.

If you want to update from LuckyAudit editor to Outlook Message box, just click below button.





It is easy to update, display, preview, and print as real html web page.


4.4.3. If you want to preview, print, or export to PDF or excel, it's really easy, just need to click below buttons and all steps are as you are familiar with.



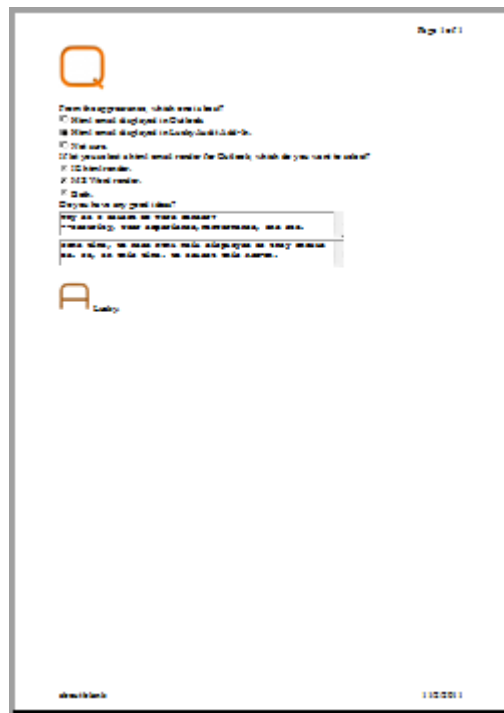
Copy html content to Clipboard.

 Paste html content from Clipboard to Editor.

 Page setup.

 Print Preview.

 Print.



## 5. Create Request Questions.

### 5.1. Steps of creating a question.

For most questions, we classified them into Radio, Check, and Text 3 types. For each type, we provide quick way as below.

a. Input question content into the “Question Textbox”

Question

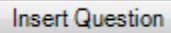
b. Select what question type do you want.

QuestionType:

c. Select how many Options do you want to insert.

Count:

d. Click Insert Question to insert at current cursor position.



e. After each radio image, just input the Answer Options which you provide for users to select.

How do you feel today?

- ☐ Same old.
- ☐ Good
- ☐ Better
- ☐ |

Then, the finished one question result should be displayed as format.

How do you feel today?

- ☐ Same old.
- ☐ Good
- ☐ Better
- ☐ Best

Others are the same.

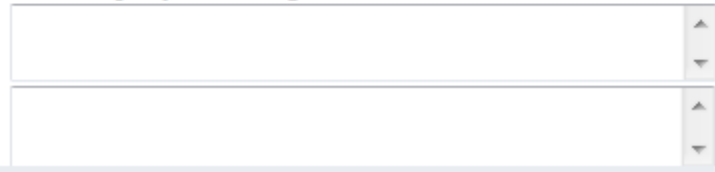
How do you feel today?

- ☐ Same old.
- ☐ Good
- ☐ Better
- ☐ Best

What fruits do you like?

- ☐ Apple
- ☐ Orange
- ☐ Grape
- ☐ Pear
- ☐ Banana
- ☐ Papaya

Please input your feelings.



And you can change and edit questions and options by this way.

## 5.2. Validate your input html questions and options.

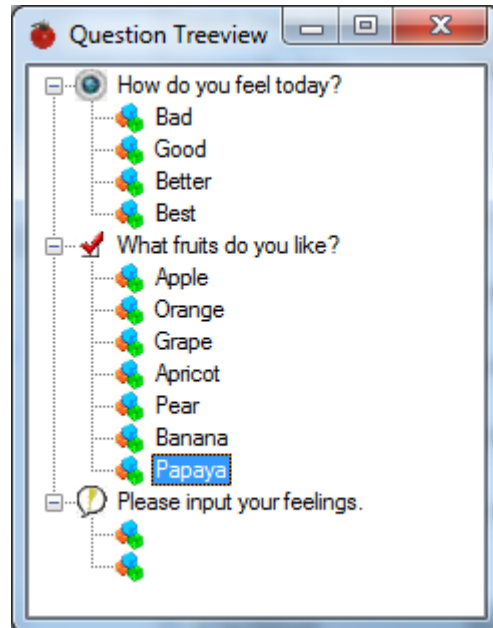
If you are not sure, the background html is correct or not ( I recommend you to validate during beginning using.), you can click Validate & Update button to check, change and update back.



Validate & Update button.

#### 5.2.1. Validate your created questions and options' format.

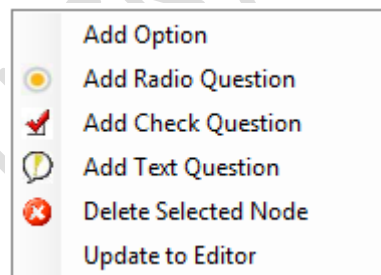
Just click Validate & Update button, all your created questions and options will be checked and correct questions and options will be displayed in the TreeView, questions and options of incorrect format cannot be parsed into TreeView.



#### 5.2.2..


### 5.3. Edit Questions & Options in TreeView .

All operations for TreeView are related to below popup menu.



Note:


All adding tree nodes are inserted after current selected node, only while there is no any node, your selected question node will be appended.


 **Add Radio Question** Add a Radio Question just after selected question node. If




selection is on a question's child Option node, inserted just after this selected Option's Question node.

 **Add Check Question** As above logic, add a Check Question.

 **Add Text Question** As above logic, add a Text Question.

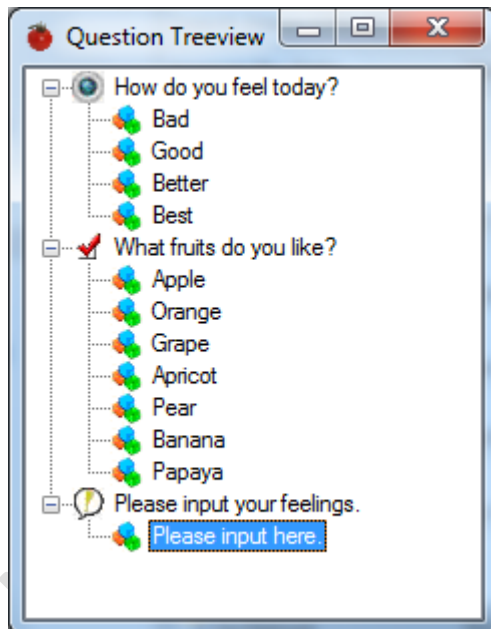
 **Add Option** Add an Option just after the selected. About its type, just according to the selected question type.

 **Delete Selected Node** Click to delete current selected node, question or option.


For each node, you can double click to edit its content.



Use above menu items, you can add, edit, delete, modify the question and option content, amount, and their sequence as you want.



5.4. Update all your changes back to Html Editor.

 **Update to Editor** Use "Update to Editor" menu item, you can update all your changes in Question Treeview to Editor, and above example results as below.

How do you feel today?

- ☐ Bad  
☐ Good  
☐ Better  
☐ Best

What fruits do you like?

- ☐ Apple  
☐ Orange  
☐ Grape  
☐ Apricot  
☐ Pear  
☐ Banana  
☐ Papaya


Please input your feelings.

#### 5.5. Insert some default values.

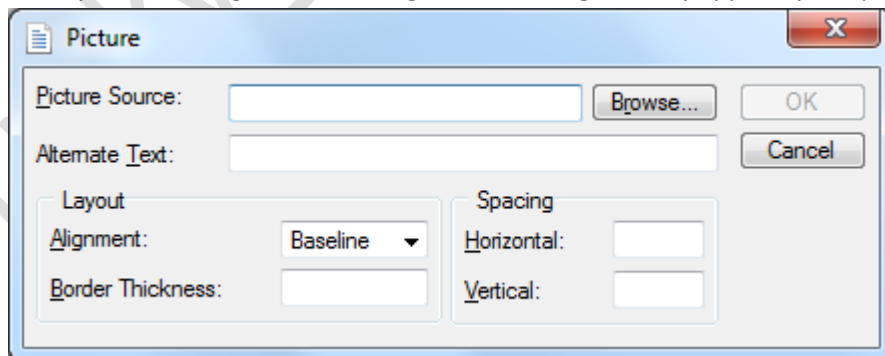
Before you send out, of course, you can leave them as empty, but sometime, maybe you are prefer to input some default selection.

Keep ☒ Design Mode to be checked to continue your design, uncheck Design Model to be unchecked to go into Interact Mode, and then you can select or input some default values.

You can also insert some other items such as Link, Image, etc.

 Insert an Image.

After you click Image button, Image Select dialog will be popped up for your operation.

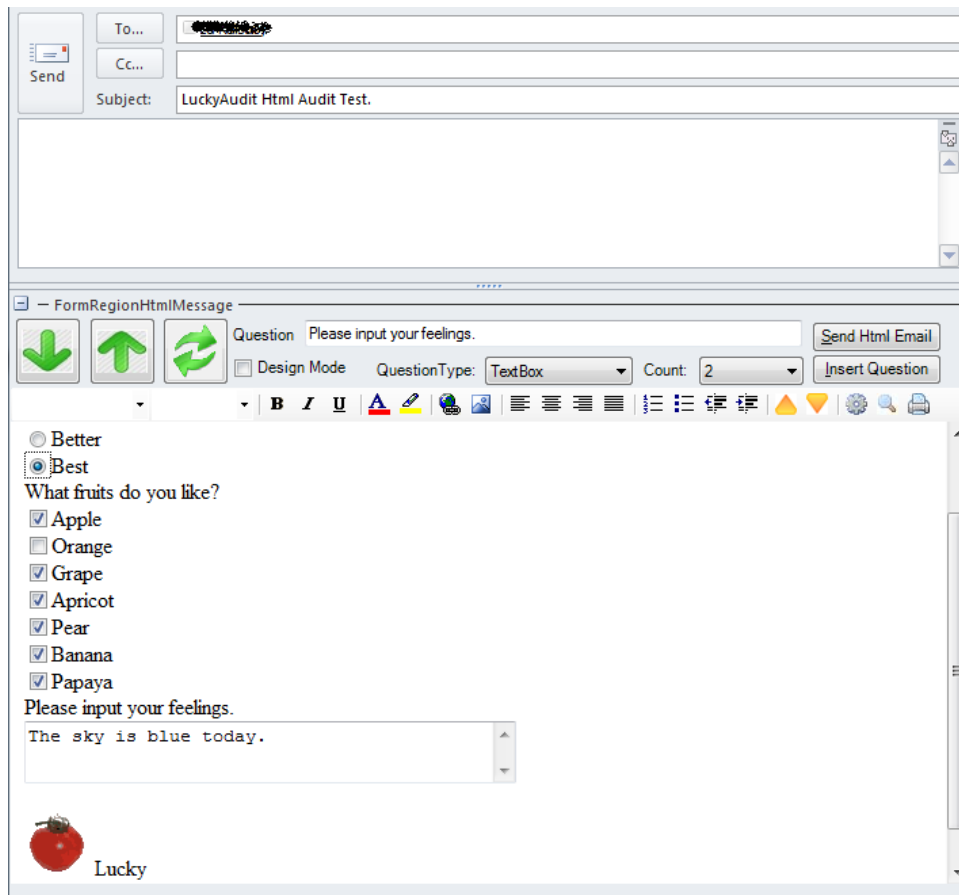


Note:

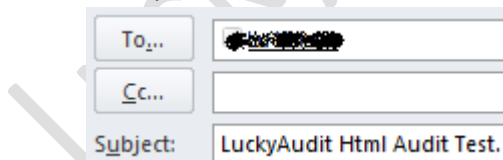
The Picture Source can be public URL or even local picture file. The system will automatically judge and if it's a public address, the picture is only linked by the email;

if it's a locale picture file, the system will embedded the image as base64 text inside the html email.(By this way, we provide opportunities and a good balance for using, but be careful not embedded huge pictures in your email.)

The final example is displayed as below.



#### 5.6. Send your html email.

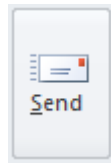


To, Cc, Bcc, and Subject are also used for Html Email and they have the same functionalities as in normal standard Outlook.

##### 5.6.1. Send email by standard Outlook way.



Update content from Editor to Message box button.



original Outlook Send button.

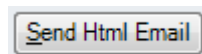
Click this update button to write your created html into Outlook message box, then click Send button to send it out.

The screenshot shows an Outlook message box. At the top, there is a 'Send' button and fields for 'To...', 'Cc...', and 'Subject:'. The 'Subject' field contains 'LuckyAudit Html Audit Test.'. The main body of the message contains the following HTML-rendered text:

How do you feel today?  
( )Bad  
( )Good  
( )Better  
(X)Best  
What fruits do you like?  
[X]Apple  
[ ]Orange  
[X]Grape  
[X]Apricot  
[X]Pear  
[X]Banana  
[X]Papaya  
Please input your feelings.  
The sky is blue today.

At the bottom of the message box, there is a small icon of a red 'x' in a square, followed by the name 'Lucky'.

#### 5.6.2. Send real Html email.

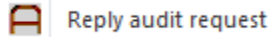


Click Send Html Email button to send your created html email out.

And on the fly way, the Add-In will save your created Questions and Options into database for late using.

#### 5.7.

## 6. Reply request questions.



When you receive a request html email, just select it and click “Reply audit request” button to reply it.

In Reply mail dialog, just select what you want to select and input what you want to input, then you can update to Outlook original message box to send by standard Outlook way, or you can directly send your changed reply by Html way.

## 6.1. Send by standard Outlook Send.

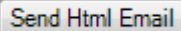


Update content from Editor to Message box button.



original Outlook Send button.

## 6.2. Send directly with Send Html Email.



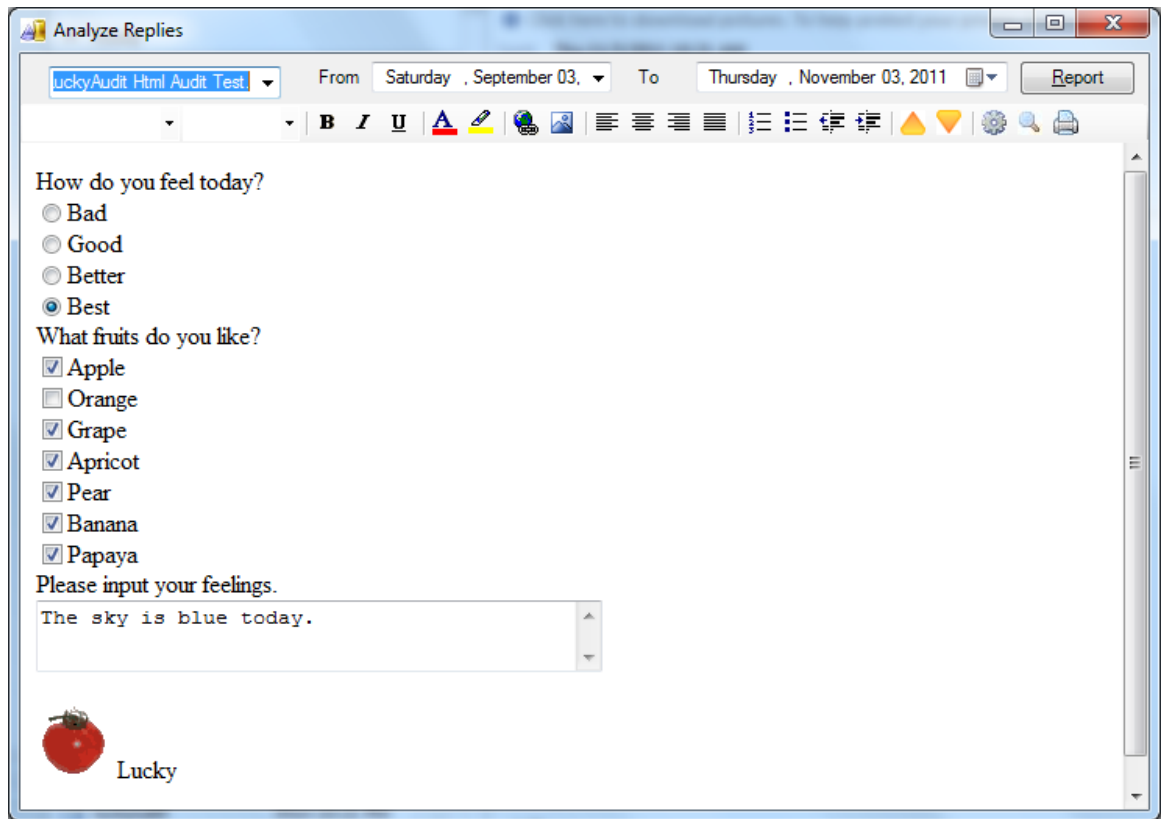
Send html email directly.

6.3.

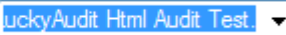
7. Analyze Request Result.

LuckyAudit will automatically collect and analyze the replies to your send out Request.

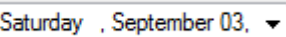
7.1. Analyze Replies dialog.



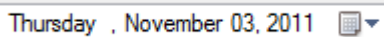
The 'Analyze Replies' dialog box is shown. It has a title bar with standard window controls. Below the title bar, there is a dropdown menu for 'Request' set to 'LuckyAudit Html Audit Test'. To the right of this are 'From' and 'To' date pickers. The 'From' date is 'Saturday, September 03,' and the 'To' date is 'Thursday, November 03, 2011'. A 'Report' button is on the far right. Below these fields is a rich text editor with various formatting icons (bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, indent, outdent, decrease indent, increase indent, link, unlink, print, etc.). The text in the editor reads: 'How do you feel today?' followed by radio buttons for 'Bad', 'Good', 'Better', and 'Best' (with 'Best' selected). Then 'What fruits do you like?' followed by checkboxes for 'Apple', 'Orange', 'Grape', 'Apricot', 'Pear', 'Banana', and 'Papaya' (all checked). Below this is a text input field with the text 'Please input your feelings.' and 'The sky is blue today.' At the bottom left of the editor is a small tomato icon and the text 'Lucky'.

Request 

Select which Request you want to analyze.

From 

From time filter to filter your sent out requests.

To 

To time filter to filter your sent out requests.

 Report

Report all the replies to your select Request.

You can preview, print, or export the report to Pdf or excel.

7.2. Request Report.

When you select a Request, the original sent out html content will automatically be displayed in beneath editor, and you can use From or To filter to filter requests in

Request combo box list, then you can click Report button to export the analyze report as below.

Reply Analyze Report

1 of 1 100% Find Next

### LuckyAudit Html Audit Test.

Question	Answer Option	Answer	Answered By	Answered Time
How do you feel today?	Bad	0	0	
	Good		Lucky	11/03
	Better	0	1	11/03
	Best	0	2	11/03
		4	0	0
What fruits do you like?	Apple	0	3	11/03
	Orange		Lucky Sina	11/03
	Grape	0	1	11/03
			0	11/03
	Apricot		Lucky Sina	11/03
			Lucky	11/03
		0	3	11/03
	Pear	0	2	11/03
	Banana	0	0	
	Papaya	0	1	11/03
		7	3	
Please input your feelings.	The sky is blue today.	Today is really a good and blue day. You know after a long foggy days.		11/03
			Lucky Sina	11/03
		Reply from hotmail, To loose weight, I only select Apple & Apricot	Lucky	11/03
			3	3 11/03
			1	3
			3	3 11/03

### 7.3. Export your request and replies.



Print.



Print Layout.

 Page Setup.

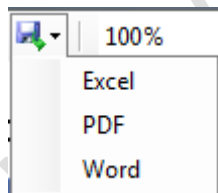
Print result as below.

Reply Analyze Report

1 of 1

LuckyAudit Html Audit Test

Question	Answer Option	Answer	Answered By	Answered Time
How do you feel today?	Bad	0	0	
	Good	0	Lu Huihui	11/15
	Better	0	2 11/15/11	
	Best	0	0	
		4	3	
What fruits do you like?	Apple	0	2 11/15/11	
	Orange	0	Lucky Lu Sina	11/15
	Grape	0	1 11/15/11	
		0	1 11/15/11	
	Apricot	0	Lu Huihui	11/15
		0	Lucky Lu Sina	11/15
		0	Lu Luby	11/15
		0	2 11/15/11	
Please input your feelings.	Pear	0	2 11/15/11	
	Banana	0	0	
	Papaya	0	1 11/15/11	
		7	3	
	The sky is blue today.	0	Lu Huihui	11/15
		0	Lucky Lu Sina	11/15
		Reply from Html: To look height: 1 only select Apple & Apricot	Lu Luby	11/15
	3	2 11/15/11		
	1	3		
		2 11/15/11		



Export to Excel, PDF, or Word document.



QuestionOptionAnswerReport.pdf - Adobe Acrobat Pro

File Edit View Document Comments Forms Tools Advanced Window Help

Create Combine Comment

1 / 1 50%

Find

LuckyAudit Html Audit Test.

Question	Answer Option	Answer	Answered By	Answered Time	
How do you feel today?	Bad	0	0		
	Good	0	1	11/03	
	Better	0	Lucky Sina	11/03	
		0	Lucky	11/03	
	Best	0	2	11/03	
	4	3			
What fruits do you like?	Apple	0	3	11/03	
	Orange	0	1	11/03	
	Grape	0	Lucky Sina	11/03	
		0	1	11/03	
		0		11/03	
	Apricot	0	Lucky Sina	11/03	
		0	Lucky	11/03	
	Pear	0	3	11/03	
	Banana	0	2	11/03	
Papaya	0	1	11/03		
	7	3			
Please input your feelings.		Today is really a good and blue day. You know after a long foggy days.		11/03	
			Lucky Sina	11/03	
		Reply from hotmail, To loose weight, I only select Apple & Apricot	Lucky	11/03	
			3	3	11/03
		1	3		
	3	3	11/03		

## 8. Manage Request Questions.

### 8.1. Save a Reply to database.



**Save Answer to database**

Save selected email reply to database.

To one request for one User, only one time of answers are saved into database, if you want to save any older ones or any assigned ones, you can select the reply email and use this Save button to save them.

### 8.2. Delete a Reply from database.



**Delete Answer from database**

Delete answers from database.

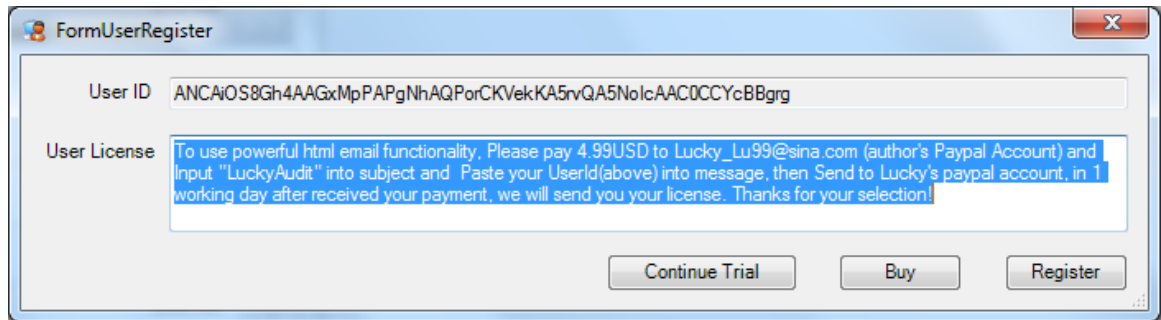
If you do not want an user's reply collected into statistics, you can select the replied

email and Delete its answers from database.

8.3.

9. License.

9.1. Free for basic functions such as display, edit html email, etc.

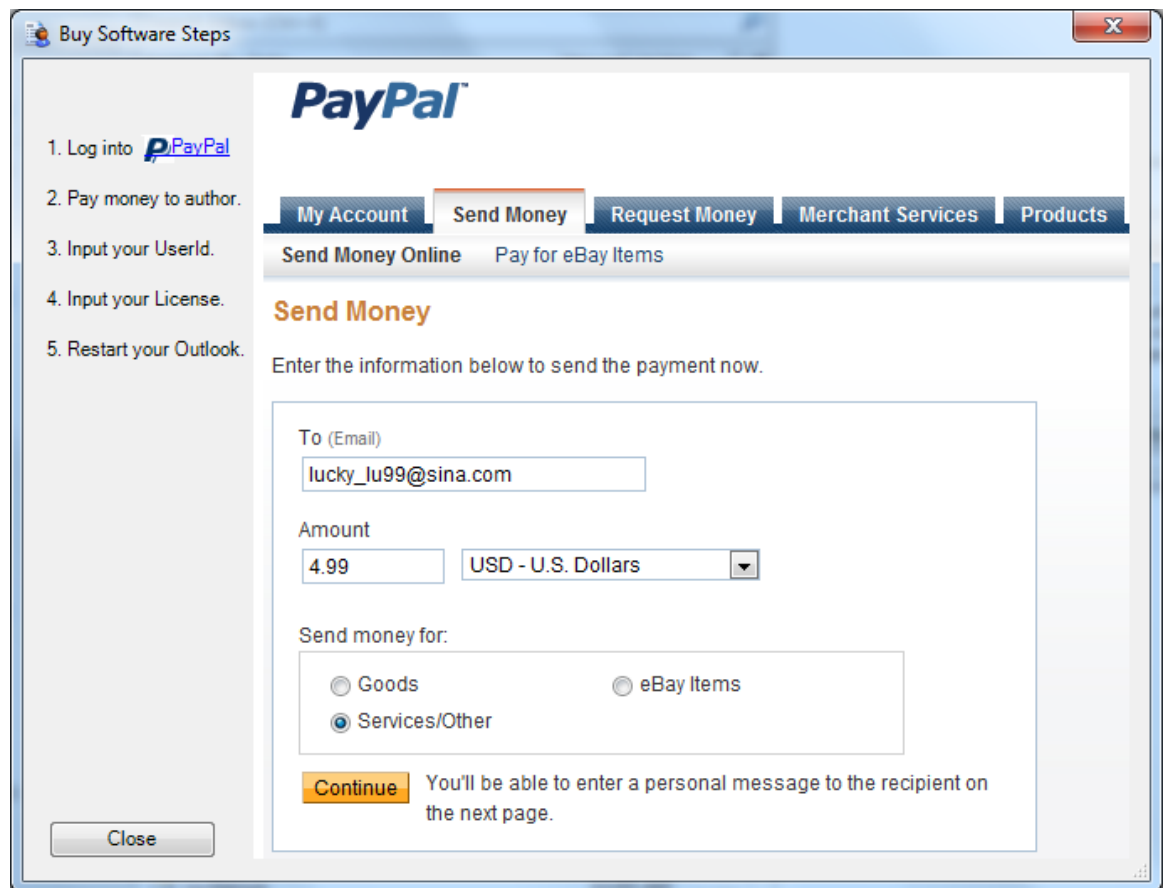


If you only want to use basic html displaying functions, please select "Continue Trial".

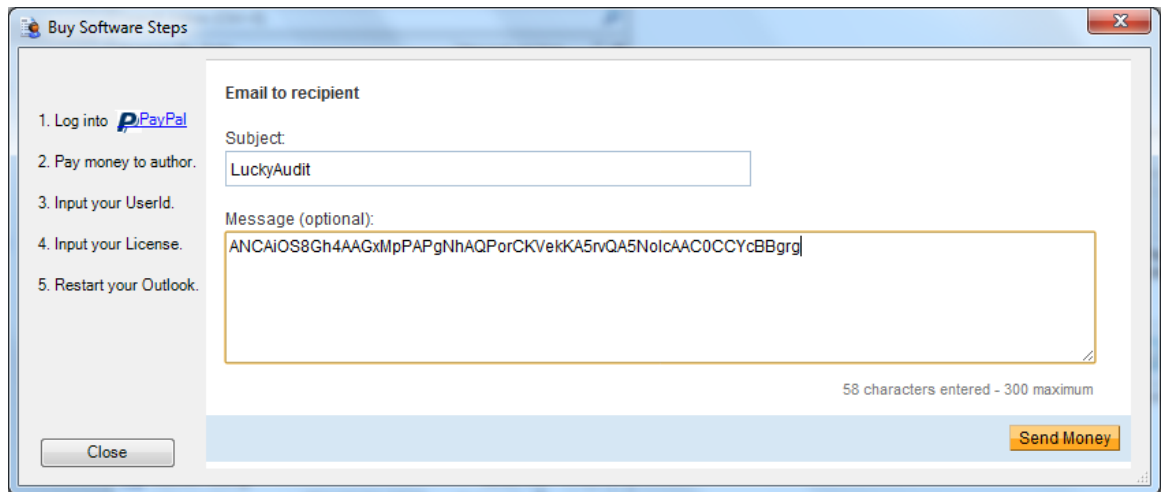
If you want to buy this Add-In, Click Buy button and it will display buying steps for you. (Note, we do not provide buying process, all steps are operated on Paypal web site to keep your information safety.)

After you get your license, please copy and paste to above "User License" text box and then click Register button to register your Add-In.

9.2. Need to pay for advantage functions.



1. Log into PayPal. We just provide a PayPal web link here, if you are familiar with PayPal, you can directly go to PayPal web site to operate.
2. "Pay money to author", on the right, we display a picture to guide you, when the right is displaying other picture, you just need to click this label on the left, then, it will display the picture for you again.
3. click "Input your UserId" label, below picture will be displayed for you. On Subject, you need to input LuckyAudit and in Message box, you need to input your UserId(Copy and Paste from Register dialog.)



4. When you get license, copy and paste into license box of Register dialog and then click Register button to register your license.

5. After you register, you need to restart your Outlook to activate the license.

#### 10. Support.

This document covers main benefits and operate steps, but not all, if you want to discuss or know more, welcome to connect me. ([Lucky\\_Lu99@sina.com](mailto:Lucky_Lu99@sina.com) or [MSN:Lucky\\_Lu99@hotmail.com](mailto:MSN:Lucky_Lu99@hotmail.com) ).