



Add to COREboards

A client emails you about the kitchen cabinets on 25-003. One click turns that email into a to-do in BQE CORE, already on the right project and phase, and already assigned to whoever should handle it.

Before you start

Your firm's IT administrator installs this once, for everybody. If you do not see an **Add to COREboards** button in Outlook, that step has not happened yet, and it is the only thing standing between you and the rest of this page.

You need a COREboards sign-in of your own, and your COREboards account has to be linked to your employee record in BQE CORE. If it is not, the add-in will say so rather than leave you guessing.

Turn an email into a to-do

1**Open the email and click Add to COREboards.**

The button sits in the toolbar above a message you have received. On a narrow window it hides under the **More actions** menu, the one marked with three dots. A panel opens down the right-hand side.

2**Sign in, the first time only.**

A small window opens and asks you to sign in to COREboards with BQE CORE, the same way you sign in to COREboards itself. If you are already signed in, it closes on its own without asking you anything. You will not be asked again for about two months, and signing in on your laptop also covers your phone.

3**Check what it filled in.**

The panel has already read the email and drafted the to-do. Everything on it is a starting point you can change.

4

Click Create to-do.

It appears straight away in BQE CORE, in your To-Do panel in COREboards, on the project, and in the assignee's next digest email. The panel then offers to add another to-do from the same message, which is useful when one email asks for three things.

What the panel fills in, and what you can change

Add to COREboards

TO-DO

PROJECT

Job number 25-003 in the subject

ASSIGN TO

DUE

Create to-do

Project and phase

It looks for your job number in the subject line first, then in the body, then for the project's name. The quiet line underneath tells you what it matched on, so you can see at a glance whether it got the right job. If it cannot tell, it says so and leaves the field for you to fill.

Assign to

Starts as you. Change it to anybody on your CORE staff list and the to-do lands on their list, not yours.

Due date and priority

Today and Medium unless you say otherwise.

To-do and Notes

The subject line becomes the to-do, tidied up. The notes carry who wrote to you and what they asked for, without the whole thread underneath. Edit either one before you save it.

Worth knowing

- It only ever **reads** the message you have open. It cannot send, move, file, flag or delete anything in your mailbox, and it never reads any other email.
- Nothing is saved until you click **Create to-do**. Opening the panel and closing it again leaves no trace.
- It works the same in Outlook on your computer, in a web browser, and on your phone.
- You can only pick projects you already have access to in COREboards. If your firm has walled a job off from you, it will not appear here either.

Installing it for the firm

One person does this once, and everybody else gets the button. It is a web page and it takes about three minutes.

- 1 **Sign in at admin.microsoft.com as a global administrator.**
- 2 **Go to Settings, then Integrated apps, then Upload custom apps.**
- 3 **Choose Office Add-in, then Provide link to manifest file.**
- 4 **Paste the address below and continue.**

```
https://coreboards.app/outlook/manifest.xml
```

- 5 **Assign it to the entire organization, accept the permission, and finish.**

The only permission asked for is **read the message the user has open**. It cannot send, move, file, flag or delete mail, and it cannot read anything the user has not opened it on.

Microsoft delivers new add-ins to each mailbox on its own schedule, usually within a day. Nobody has done anything wrong if the button is not there the same afternoon.

If admin.microsoft.com sends you to GoDaddy instead

Some firms buy Microsoft 365 through GoDaddy. When they do, GoDaddy replaces Microsoft's admin page with a simpler one of its own, and the Integrated apps section from the steps above is not on it. Nothing is wrong with your account. It just means the add-in has to be installed a different way.

That way is pasting **one line** into a program called PowerShell and signing in once. About five minutes on Windows, fifteen on a Mac because PowerShell has to be installed first. You do not need to understand the line. Pick the instructions for the kind of computer you are sitting at.

BEFORE YOU START

- Use the computer you work on. Everything needed is already on a Windows computer.
- Have the email address and password of the account that **manages the firm's email**, the one that adds and removes mailboxes. If that is not you, do this with that person.

1 Open PowerShell.

Press the **Windows key**, type **powershell**, and click **Windows PowerShell** in the list.

What you will see: a blue window with a blinking cursor.

2 Paste this one line and press Enter.

Click **Copy**, click into the blue window, paste, press Enter. There is nothing to change in it.

```
irm https://coreboards.app/outlook/install.ps1 | iex
```

What you will see: it explains what it is doing as it goes, in four numbered steps. The first can take a minute or two while it adds Microsoft's own email tools; there is nothing to click during that.

3 Sign in when the window appears.

A Microsoft sign-in window opens. Sign in as the account that **manages the firm's email**, not your everyday one if they are different. The window closes by itself.

4 Read the result, then close the window.

What you will see: in green, **COREboards is installed for everyone at the firm**, with Enabled: True. That is the confirmation. You are finished.

IF YOU SEE RED TEXT ON WINDOWS

"irm is not recognized"

You opened the wrong program. Close it and repeat step 1, making sure you pick **Windows PowerShell**, not Command Prompt.

"The account you signed in with does not manage the firm's email"

Paste the same line again and, this time, sign in as the account that adds and removes the firm's mailboxes, usually whoever set up the firm's email in the first place.

Anything else in red

The message says what stopped it and what to do. Nothing has been changed, so it is safe to paste the same line again. If you are unsure, copy the red text into the helper box below.

A Mac does not come with PowerShell, so the first five steps install it. That part is a one-time download from Microsoft, and it is free.

BEFORE YOU START

- Use the Mac you work on, and know its login password. The installer will ask for it.
- Have the email address and password of the account that **manages the firm's email**, the one that adds and removes mailboxes. If that is not you, do this with that person.

PART 1 OF 2: INSTALL POWERSHELL**1****Find out which kind of Mac you have.**

Click the **Apple menu** in the top-left corner of the screen, then **About This Mac**.

What you will see: a small window. If it says **Chip** followed by Apple M1, M2, M3, M4 or similar, you have an **Apple silicon** Mac. If it says **Processor** followed by Intel, you have an **Intel** Mac. Remember which; you need it in step 3.

2**Open Microsoft's download page for Mac.**

Click this link: [Install PowerShell 7 on macOS](https://learn.microsoft.com/en-us/powershell/scripting/install/install-powershell-on-macos) (https://learn.microsoft.com/en-us/powershell/scripting/install/install-powershell-on-macos). If you ever land on a general PowerShell page instead, look for the link named **Install PowerShell on macOS** and click that.

What you will see: a Microsoft page titled **Install PowerShell 7 on macOS**.

3

Download the right installer.

Scroll down to the heading **Manually download and install the package**. Under **PowerShell 7.6 (LTS)** there are two links. Click the one that matches your Mac from step 1:

- **Apple silicon** (Chip: Apple M...): click the link that ends in **osx-arm64.pkg**
- **Intel** (Processor: Intel): click the link that ends in **osx-x64.pkg**

What you will see: a file downloads to your Downloads folder. Its name starts with **powershell-7.6**. The numbers after that may be newer than shown here; that is fine.

4

Run the installer.

Open your **Downloads** folder and double-click the file you just downloaded. Click **Continue**, then **Continue** again, then **Install**. Type your Mac password when asked, then **Close**.

What you will see: "The installation was successful." If the Mac refuses to open the file, see the section below the steps.

5

Open PowerShell.

Open **Finder**, click **Applications** in the sidebar, and double-click **PowerShell**. (Or press **⌘ Space**, type **PowerShell**, press Enter.)

What you will see: a window with a line starting **PS** and a blinking cursor.

PART 2 OF 2: INSTALL COREBOARDS

6

Paste this one line and press Enter.

Click **Copy**, click into the PowerShell window, paste, press Enter. There is nothing to change in it.

```
irm https://coreboards.app/outlook/install.ps1 | iex
```

What you will see: it explains what it is doing as it goes, in four numbered steps. The first can take a minute or two while it adds Microsoft's own email tools; there is nothing to click during that.

7

Sign in with the code it shows you.

It prints one sentence with a **web address** and a **code**. Open Safari, type in that web address, type the code, and sign in as the account that **manages the firm's email**. Safari will say you have signed in. Come back to the PowerShell window; it carries on by itself.

8

Read the result, then close the window.

What you will see: in green, **COREboards is installed for everyone at the firm**, with Enabled: True. That is the confirmation. You are finished.

IF SOMETHING STOPS YOU ON A MAC

At step 4, "Not Opened" or "Apple could not verify... is free from malware"

The Mac is being cautious about a file from the internet. Click **Done**. Open **System Settings**, click **Privacy & Security**, scroll down to the **Security** section, and click **Open Anyway**. When the warning appears again, click **Open Anyway** once more and type your Mac password. Then go back to step 4.

"The account you signed in with does not manage the firm's email"

Paste the same line again and, on the sign-in page, use the account that adds and removes the firm's mailboxes, usually whoever set up the firm's email in the first place.

Anything else in red

The message says what stopped it and what to do. Nothing has been changed, so it is safe to paste the same line again. If you are unsure, copy the red text into the helper box below.

On either computer: Microsoft delivers the new button to each person's mailbox on its own schedule, and GoDaddy-hosted email is the slow kind. When we did this ourselves it took three days to arrive. Quit and reopen Outlook once a day to check. You do not need to run the line again, and running it again will not hurry it.

PREFER TO BE WALKED THROUGH IT?

ChatGPT or Claude are good at this: patient, one step at a time, and able to read an error message back to you in plain English. Copy the text below, paste it into either one, and follow along. They cannot run anything on your computer; they only talk you through it.

I am an office administrator, not a technical person. I need to install the COREboards add-in for Outlook for my whole firm. Our Microsoft 365 email comes through GoDaddy, so I do not have the normal Microsoft admin center. The instructions say to open PowerShell on my computer (tell me how, and ask me whether it is Windows or a Mac) and paste this one line, then press Enter:

```
irm https://coreboards.app/outlook/install.ps1 | iex
```

It will then ask me to sign in as the account that manages our firm's email. Please walk me through this one small step at a time, wait for me to say I have done each step before giving the next, and if I paste you any error text, tell me in plain English what it means and exactly what to do next.

Taking it off again

Open PowerShell as before, paste this one line, and sign in when asked. It removes the button from everyone's Outlook and changes nothing in COREboards or CORE.

```
irm https://coreboards.app/outlook/uninstall.ps1 | iex
```

Would rather not do this yourself? Tell us, and we will do it with you on a screen share. It is the same fifteen minutes.

If something looks off

There is no Add to COREboards button.

Either your administrator has not installed it yet, or Microsoft has not delivered it to your mailbox: that takes up to a day on most firms' email and took three days on ours. Quit Outlook and reopen it, then look under the ⋮ (More actions) menu on an email and, in Outlook for Mac and Windows, under **Get Add-ins → Admin-managed**. Once it is listed there, ⋮ → **Customize Toolbar** lets you drag it onto the toolbar so it is always in view.

It asks me to sign in every time.

Something is clearing the sign-in between visits, usually a browser set to block site data. Tell us and we will look, rather than living with it.

It says my login is not linked to a CORE employee.

Your COREboards account is not yet tied to your record in BQE CORE, so there is nobody for the to-do to belong to. Your firm's COREboards administrator fixes this from the Users and Access screen.

It picked the wrong project.

Change it before you click Create to-do. The line under the field tells you what it matched on, which is usually a job number that also appears somewhere innocent in the message.

Questions, or something behaving oddly? Use **Bugs and requests** in the COREboards help menu and it comes straight to us.

COREBOARDS · ADD TO COREBOARDS, THE OUTLOOK ADD-IN ·
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