



WO CRM Installation Guide

Outlook Integration for New Users

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Pre-Install Checklist

 $\hfill\square$ Administrator rights to the workstation you're installing the application on

- □ Location of the user's WOTraffic.exe file
- □ Your WO Sales Service URL (provided by your Implementation Team)
- □ The user's WideOrbit username and password

Alert: *WO Sales* Outlook Integration is <u>only</u> supported if Outlook[®] is installed in 32-bit mode.

Download Instructions

1. Download the Installer

- In a web browser, access WO Sales CRM using the URL provided by your WO Implementation Team
- Login using your WideOrbit username and password
- Click **My Account** in the upper right hand corner of the *WO Sales* Home page

WO SALES	Home Accounts	Opportunities	Inventory	We Research Ar	lcome admin Lo alytics Acti	gout Entrustment	t Help My Account Rece	Admin About	
Home						Create Contac	t Add Dashlets	💥 Actions 🔻	
Click Inst select th	all WO Clien e Installer exe	t and ecutable	WO SAI	LES : Home	Home	Accounts	Opportunities	Inventory	Reseau
with Out	look plug-in 2	2.x.x.x	Create N Vsers	New User	Users: A Employe	dministrato	r (admin) Traffic Install W	0 Client	
WO SAL	S Home	Accounts	Opportunities	Inventory	Research	Analytics	Activities Other	Welcom	
Users: I	lome								
 ♀ Create Ne ♀ Users Import 	w User	I WO Client, down Client setup Versi Client setup Versi Client setup Version	of WO Client, in MS	the programs b k plug-in 2.2.1.3 December 8th 2 Your plu Out differ fro	elow: Build Date: Dece gin version n om those dep	ember 8th, 2011 number and bu sicted here.	uild date might	: Tab.	

• When prompted, Save the executable to the user's desktop or download folder for easy access

2. Run the Executable

- Double-click on the executable file and click **Run**.
 - If the system notifies you that there is another installation, select to uninstall it.
 - You may also be prompted to close Outlook.
- When the Installation Wizard opens, click **Next**.



WO CRM Installation Guide: Outlook Integration for New Users v2.2

🔞 WO Sales Setup v2.0 with Outlook plug-in v2.2.1.3
Choose Install Location Choose the folder in which to install WO Sales.
Setup will install WO Sales in the following folder. To install in a different folder, click Browse and select another folder. Click Next to continue.
Destination Folder C:\Users\trubenstein\AppData\WO Sales Browse
Space required: 48.3MB Space available: 72.9GB
Driving the Business of Advertising < Back Next > Cancel

 When prompted, enter (or verify, if prepopulated) the location of the user's
 WOTraffic.exe file. This step is required to continue installation. Click **Next**.

• Typically, the installation will occur to the default destination folder, unless you wish to specify otherwise. Click **Next**.

Alert: If a "Roaming" folder is added in the install path, please contact your **ISPEC** (if your station is not yet live) for help. If your station is live, please contact <u>support@wideorbit.com</u> for help.

🔞 WO Sales Setup v2.0 with Outlook plug-in v2.2.1.3	
Choose WOTraffic Executable Setup requires WOTraffic executable to install protocol support.	we
In case if WOTraffic executable is not predifined below, choose the lo executable file manually.	cation of WOTRaffic
C:\WideOrbit\Sales\WOTraffic.exe	Browse
Back Nex	t > Cancel

When prompted, enter your WO Sales service
 URL and ensure that all checkboxes below the
 URL are selected. Click Next.

Technical Note: *WO Sales* requires Flash Player 10 or later for the Mozilla Firefox browser. If the Install Flash Player 10 checkbox is selected by default, the installer has not detected that the proper version is installed. Click **Next** to install the player as well.

WO Sales Setup v2.0 with Outlook plug-in v2.2.1.3
Configure WO Sales Please configure WO Sales installation.
WO Sales URL is required to create shortcuts.
http://192.168.50.80/wosales
 ✓ Install Desktop Client ✓ Create Quick Launch shortcut ✓ Create Desktop shortcut
Flash Player is required to run WO Sales.
Install Flash Player 10 (you already have Flash Player 10 or later installed)
Driving the Business of Advertising

3. Enter WideOrbit Credentials for Outlook Integration



• Enter the user's *WO Traffic* username and password when prompted. The login used for *WO Traffic*, *WO Sales*, and the Outlook Sync plug-in should be the same.

4. Select Start Menu Folder and Complete Installation

- Select or verify the default Start Menu folder, then click **Install**.
 - When the installation completes, click **Next**.
 - On the final page of the wizard, click
 Finish.



5. Clean Up User's Desktop

• If you saved the installer executable to the user's desktop, please move it to the Recycle bin, leaving only the *WO Sales* shortcut in view.

6. Configure Outlook Plug-in

• Open Microsoft Outlook and click on the Settings button on the new WO Sales Toolbar.

(😔 Inbox - Micr	osoft Outlook	
	<u>F</u> ile <u>E</u> dit <u></u>	/iew <u>G</u> o <u>T</u> ools <u>A</u> ctions <u>H</u> elp C <u>o</u> nferencing Adobe	<u>P</u> DF
	<u> </u>	🔒 🦉 🗙 😂 Reply 🙈 Reply to A <u>l</u> l 🙈 For <u>w</u> ard 🗄 🔡	Ҟ 📑 Send/Re <u>c</u> eive 🔻
	Settings	🖻 Archive Mail Item 🛛 New 🔻 Sync with WO Sales 👻 🥃	
	Mail	« 🖾 Inbox	Search Inbox

7. Login Tab

• Please <u>do not</u> disturb items on the **Login** tab. <u>Do not</u> click any buttons, including **OK**. Instead, click on the **Conflict Resolution** tab.

Alert: Connection to the *WO Sales* server will be disabled until your WO Implementation Team arrives on site.

Alert: Clicking the Test button <u>will result</u> in unexpected behavior from the plug-in at this point and may compromise the install.

Your WO Implementation Team will verify these settings and configure this tab on site.

/ideOrbit	Outlo	ok Plug-In - Se	ttings					
Login	Conf	flict Resolution	Calendar	Contacts	Tasks	Advanced	About	
User nar	me:	wodemo						
Passwor	d:	******						
Service	URL:	http://192.168	50.80:80/wo	sales/soap.	php			
				Test				
			l					
	D BI	UTTONS	HANGE ON THE	SETTIN LOGIN	igs o I tab.	ir Click		
wide						01.		Canaal
0	COTT					UK		Cancer

8. Conflict Resolution Tab

- Please verify the following settings and adjust as needed to match:
 - o Meetings Manual
 - **Contacts** Manual
 - o Tasks Manual
 - o Calls Manual
 - Approve WO Sales Changes all checkboxes should be selected

WideOrbit Or	utlook Plug-In - Settings		х
Login C	Conflict Resolution Calendar Contacts Tasks	Advanced About	
Select synd	chronization conflict resolution options	Approve WO Sales changes	
Meetings:	Manual	\checkmark	
Contacts:	Manual •		
Tasks:	Manual	\checkmark	
Calls:	Manual	V	

9. Calendar Tab

- Please verify the following settings and adjust as needed to match:
 - Sync folder Point to folder containing user's business-related calendar entries
 - Allow private events... deselected 🔳
 - Send attachments selected Image: Selected Image
 - Use time limit... selected 🗹
 - o Load calendar items... 30 days
 - o Keep in sync both deselected 🔳

10. Contacts Tab

- Please verify the following settings and adjust as needed to match:
 - Sync folder Point to folder containing user's business-related contacts
 - Allow private events... deselected Image: Allow private events...
 - o Keep in sync both deselected 🔳

WideOrbit Outlook Plug-In - Settings × Login Conflict Resolution Calendar Contacts Tasks Advanced About Sync folder: ••••• Meetings last sync time: Tuesday, July 19, 2011 8:40:41 AM Calls last sync time: Tuesday, July 19, 2011 8:41:39 AM Allow private events synchronization Ø Send attachments Ø Use time limit during calendar items synchronization Load calendar items for last 30 days Keep in sync Sync at Outlook startup Sync every 30 minutes

V	/ideOrbit Outlook Plug-In - Settings	х
	Login Conflict Resolution Calendar Contacts Tasks Advanced About	
	Sync folder: ····	
	Contacts last sync time: Tuesday, July 19, 2011 8:40:15 AM	
	Allow private contacts synchronization	
	Keep in sync	
	Sync at Outlook startup	
	Sync every 30 minutes	

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- Please verify the following settings and adjust as needed to match:
 - Sync folder Point to folder containing user's business-related tasks
 - Use time limit... selected I
 - o Load tasks items... 30 days
 - o Keep in sync both deselected 🔳

Resolution Cal	Contract			
	endar Contact	Tasks	Advanced /	About
me: Tuesday, Ju	ly 19, 2011 8:41:	06 AM		
during tasks items	synchronization			
for last 30	days			
ok startup				
30 minutes				
	ime: Tuesday, Ju during tasks items s for last 30 ook startup 30 minutes	ime: Tuesday, July 19, 2011 8:41: during tasks items synchronization s for last 30 days pok startup 30 minutes	ime: Tuesday, July 19, 2011 8:41:06 AM during tasks items synchronization s for last 30 days pok startup 30 minutes	ime: Tuesday, July 19, 2011 8:41:06 AM during tasks items synchronization s for last 30 days

12. Advanced Tab

- Please verify the following settings and adjust as needed to match:
 - Show context menu... selected
 - o Display notification... deselected
 - o Auto search by email... selected ☑
 - o Log SOAP messages deselected 🔳
 - o Extended debug logging- deselected
 - Search in several threads selected
 - Used cached mode selected
 - o Use proxy deselected 🔳

Login Conflict Resolution Calendar Contact	s Tasks	Advanced	About
Show context menu (on right click)	Network	/ Logging se	ttings
Display notification during background sync	E Log SC	OAP message	es
Archive	Extend	led Debug Lo	ogging
V Auto search by email addresses	Search	n In Several T	hreads
	✓ Use "C	ached Mode	
Reset sync data Change category colors			
Proxy server			
Use proxy Default Custom			
Use proxy Default Custom C			
Use proxy Custom proxy settings			Port: 80
Use proxy Default Custom proxy settings Address: User name:			Port: 80
Use proxy Default Custom proxy settings Address: User name: Password:			Port: 80
Use proxy Default Custom Custom proxy settings Address: User name: Password: Default Default Custom			Port: 80
Use proxy Default Custom proxy settings Address: User name: Password: Bypass proxy server for local addresses			Port: 80
Use proxy Default Custom proxy settings Address: User name: Password: Bypass proxy server for local addresses			Port: 80

Alert: <u>AFTER ALL STEPS ARE COMPLETED</u>, please click **OK** to save the configuration changes

Revision History

Name	Date	Reason	Version
Tiffany Rubenstein	04/06/2012	Document created in new template. Content updated to v2.2.	1.0
Tiffany Rubenstein	04/09/2012	Added information regarding contacting ISPECs.	1.1
Tiffany Rubenstein	04/12/2012	Added Alert box to Pre-Install checklist.	1.2