

WO CRM v2.2; Outlook Plug-in v2.2.1.7

# ***WO CRM Outlook® Plug-in*** **Upgrade Guide**

Upgrade, Installation, and Verification Process

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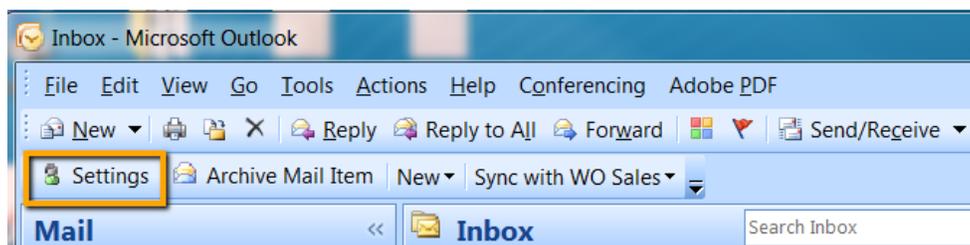
## Introduction

With version 2.2.1.7, *WO Sales* has made a variety of high-priority fixes and enhancements to the WideOrbit Outlook Plug-in. Additionally, newer versions of the plug-in will now auto-update, preventing users from having to manually install new versions. In order to ensure that all users are now on the latest plug-in version, WideOrbit would like you to verify your current version. If the version is not recent, an update will be needed. In the event that an update does not work, or if you are new to *WO CRM*, instructions for installing the *WO Sales* desktop client with plug-in are also included.

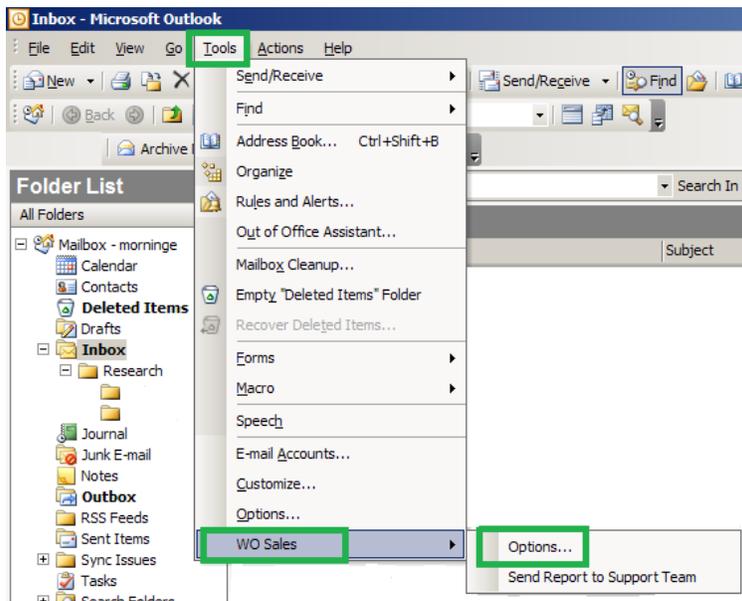
## Verify Current Plug-in Version

### Open Microsoft Outlook

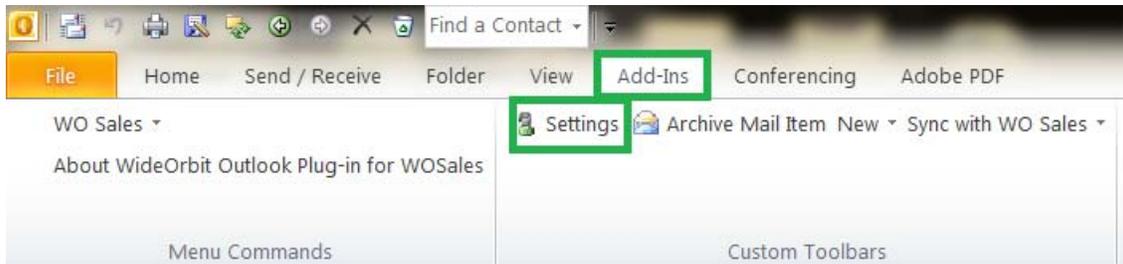
1. Upon opening Microsoft Outlook, if you receive a message that auto-installer is updating to 2.2.1.7, follow any instructions provided, then **STOP**. You are already on a recent version of the plug-in and the latest version is being automatically installed correctly. No further action is needed.
  - o If auto-update fails and your station is not yet live, contact your ISPEC. If your station is live, contact [support@wideorbit.com](mailto:support@wideorbit.com).
  - o To verify your version after auto-update, go to step 4.
2. If you did not receive this message, or are unsure of your current version, then click the **Settings** button in the *WO Sales* tool bar.



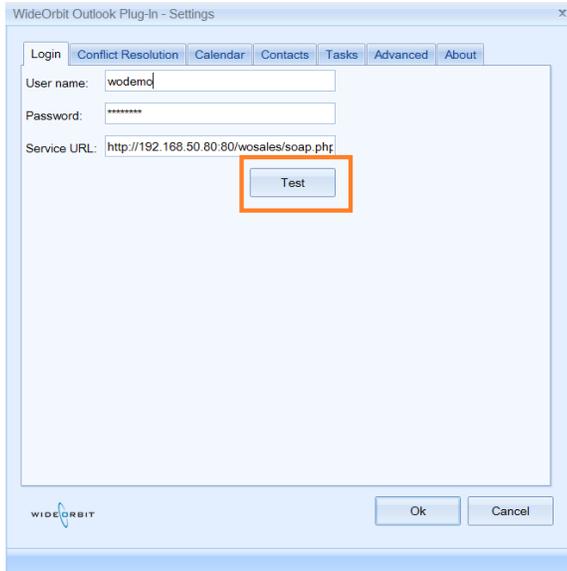
- If you are using Outlook 2003, you may not see a **Settings** button. Instead, select Tools > WO Sales > Options to launch the Settings screen.



- If you are using Outlook 2010, your **Settings** button will be located on the Add-Ins tab.



- If you do not have a **Settings** button OR a WO Sales > Options menu selection, **STOP** and go to the Download Instructions section on page 6 of this document. You do not have the Outlook Plug-in installed.



3. On the **Login** tab, click the **Test** button.

- If your test connection succeeds, then close the success message and proceed to step 4.
- If your test connection fails, update your username and password to match your *WO Traffic* username and password, and then click **Test** again.

4. Click on the **About** tab.

5. Check your Version.

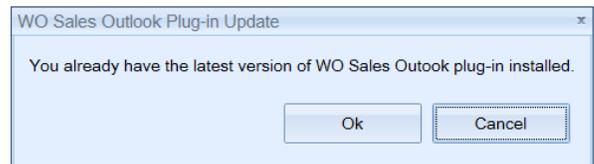
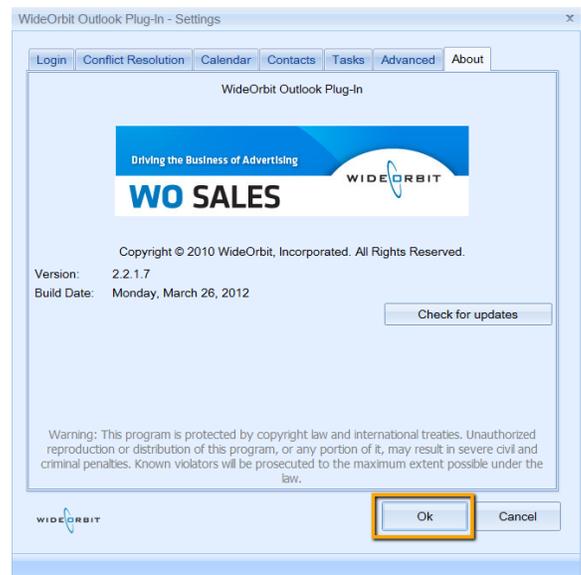
- If the version is 2.2.1.6 or 2.2.1.7, then **STOP** – your plug-in version is up to date and no further action is needed.
- If the version is 2.2.1.5 or before, then click the **Check for Updates** button.

- After a few moments you may receive a message asking you to close Outlook. Close Outlook. Your plug-in version should now successfully update.

- Re-open Outlook, then click **Settings > About**.
- Check your Version. If the version is 2.2.1.6 or 2.2.1.7, then **STOP** – your plug-in version is up to date and no further action is needed.

- If you receive a message indicating that you already have the latest version, **STOP** – contact your ISPEC if your station is not yet live, or [support@wideorbit.com](mailto:support@wideorbit.com) if your station is live. Ask them to verify that the latest *update.xml* and *WideOrbit.SilentUpdater* files have been added to your server.

- Once WideOrbit Support has added the latest files to your server, repeat step 5.



# Download Instructions

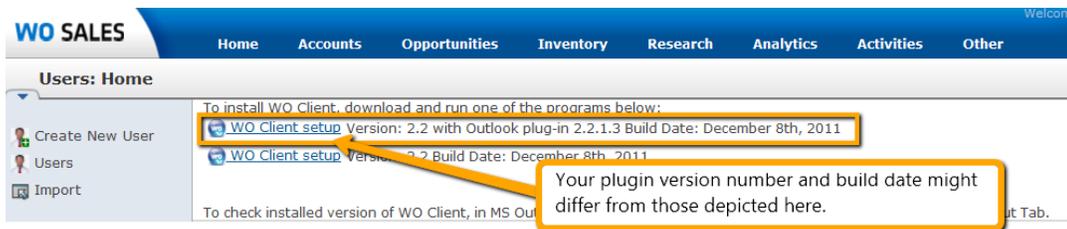
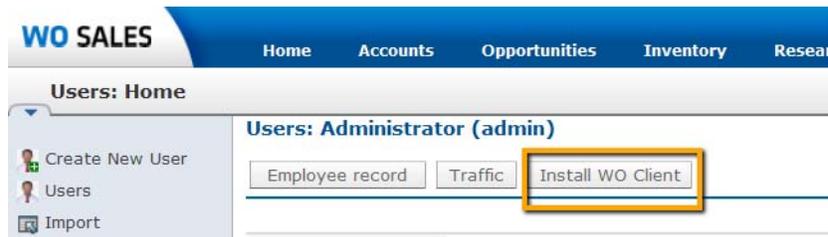
If you do not have the WO CRM desktop client, or if you do not have the WideOrbit Outlook Plug-in installed, then downloading and installing the application may be necessary.

## 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



- Click **Install WO Client** and select the Installer executable with Outlook plug-in 2.x.x.x

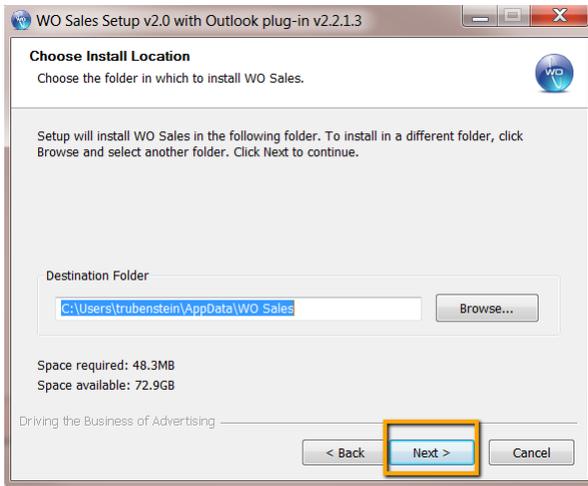


- When prompted, **Save** the executable to the user's desktop or download folder for easy access

## 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**.



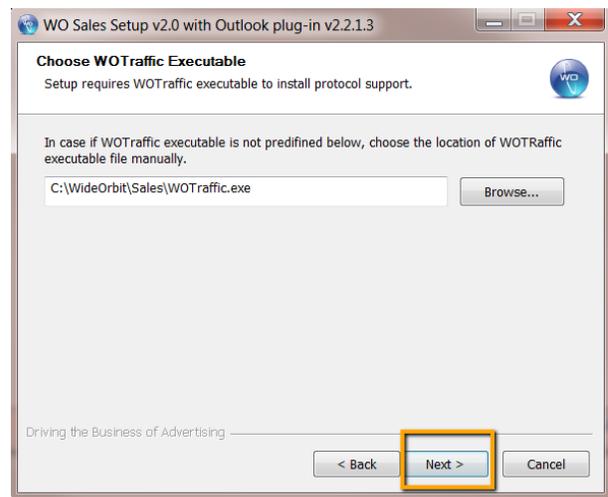


- Typically, the installation will occur to the default destination folder, unless you wish to specify otherwise. Click **Next**.

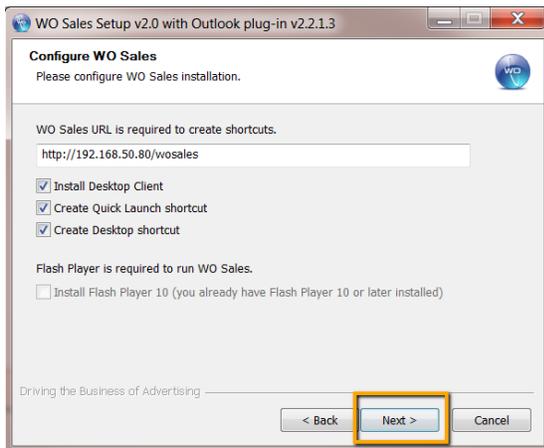


**Alert:** If a “Roaming” folder is added in the install path, please contact your **ISPEC** (if your station is not yet live) for help. If your station is live, please contact [support@wideorbit.com](mailto:support@wideorbit.com) for help.

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

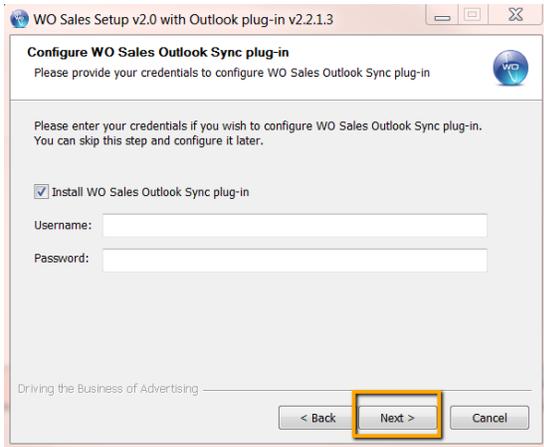


- When prompted, enter your *WO Sales* URL and ensure that all checkboxes below the URL are selected. Click **Next**.



**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.

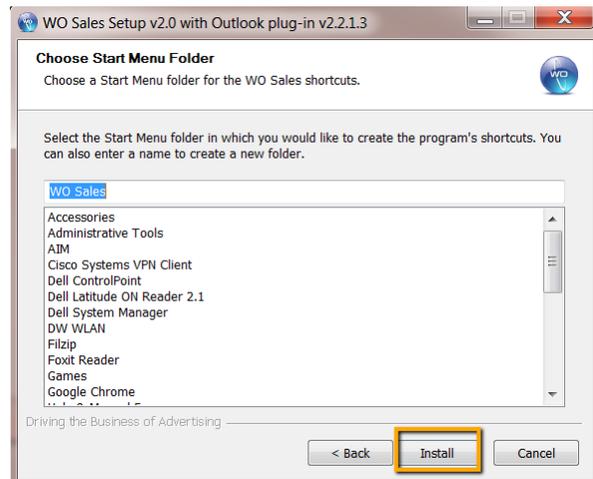
### 3. Enter WideOrbit Credentials for Outlook Integration



- 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

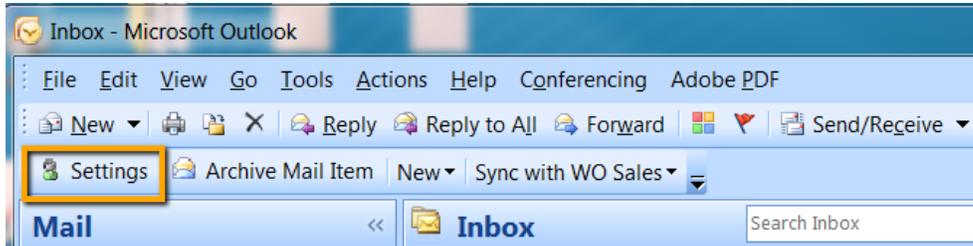
- If you saved the installer executable to the user’s desktop, please move it to the Recycle bin, leaving only the *WO Sales* shortcut in view.

# Validate Outlook Plug-in Configuration

Configuration selections will remain from previous installation, but it is recommended to review and confirm they are appropriately selected.

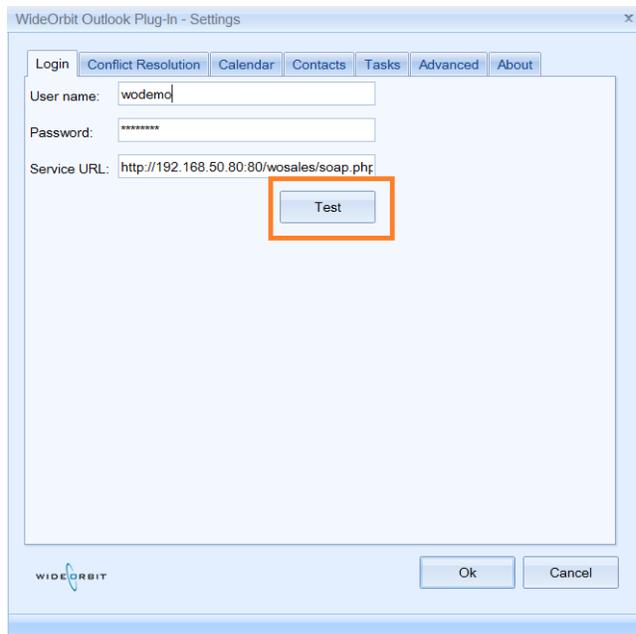
## 1. Configure Outlook Plugin

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



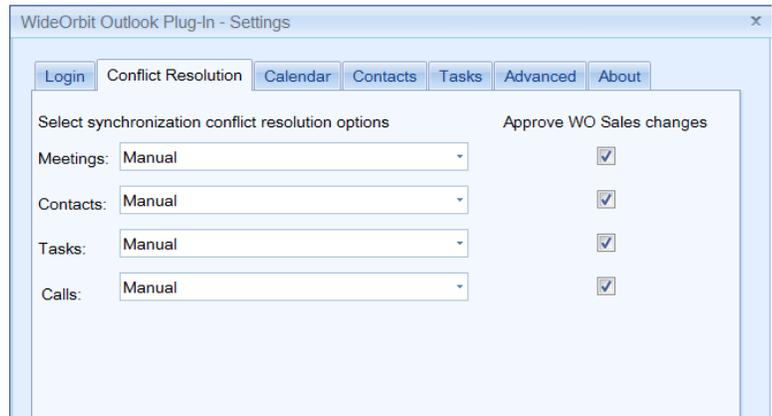
## 2. Login Tab

- Click **Test** to verify your connection.
- If the test fails, re-enter your username and password.
- Verify that the *WO Sales* URL is correct.



### 3. Conflict Resolution Tab

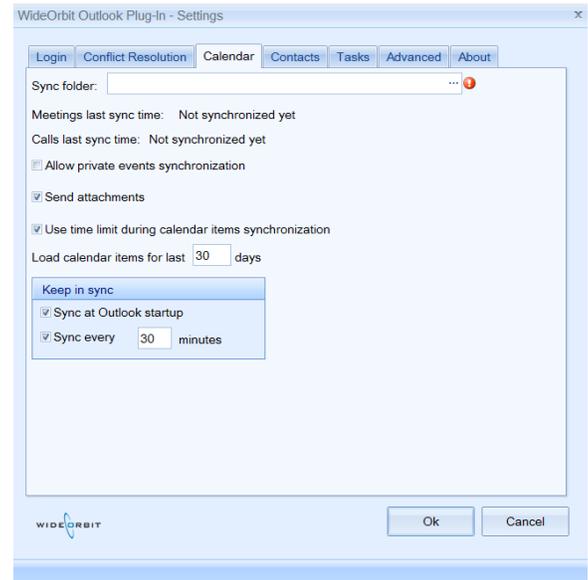
- Please verify the following settings and adjust as needed to match:
  - **Meetings** – Manual
  - **Contacts** – Manual
  - **Tasks** – Manual
  - **Calls** – Manual
  - **Approve WO Sales Changes** – all checkboxes should be selected



### 4. 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
  - **Use time limit...** – selected
  - **Load calendar items...** - 30 days
  - **Keep in sync\*** – both selected

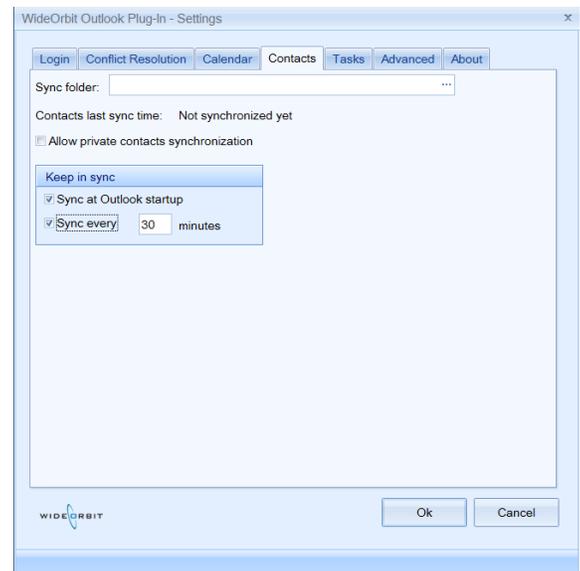
\*Selection option depends on user role and personal preference of sync frequency. AEs generally sync at startup and with a frequency of every 30 minutes, while Sales Managers generally do not sync.



### 5. 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
  - **Keep in sync\*** – both selected

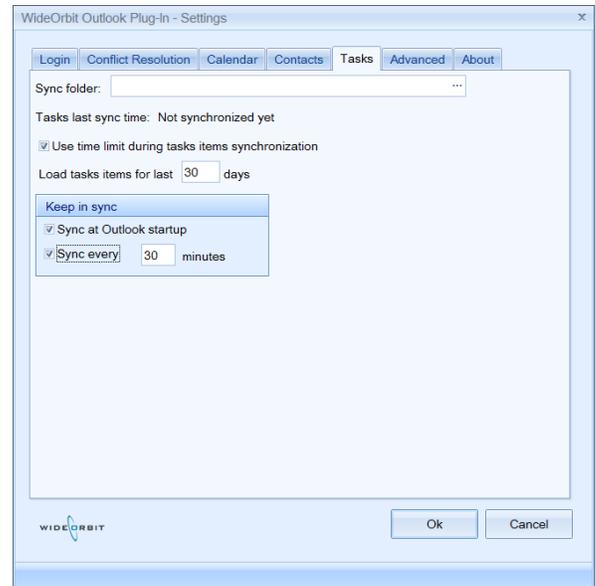
\*Selection option depends on user role and personal preference of sync frequency. AEs generally sync at startup and with a frequency of every 30 minutes, while Sales Managers generally do not sync.



## 6. Tasks Tab

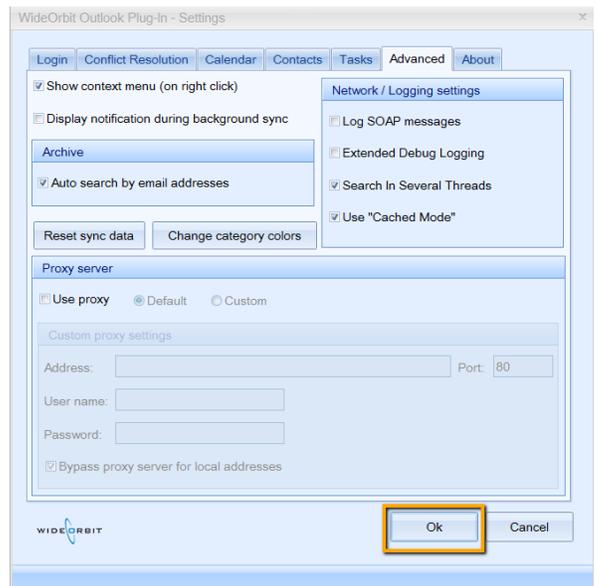
- Please verify the following settings and adjust as needed to match:
  - **Sync folder** – Point to folder containing user’s business-related tasks
  - **Use time limit...** - selected
  - **Load tasks items...** - 30 days
  - **Keep in sync\*** – both selected

\*Selection option depends on user role and personal preference of sync frequency. AEs generally sync at startup and with a frequency of every 30 minutes, while Sales Managers generally do not sync.



## 7. Advanced Tab

- Please verify the following settings and adjust as needed to match:
  - **Show context menu...** - selected
  - **Display notification...** - deselected
  - **Auto search by email...** - selected
  - **Log SOAP messages** - deselected
  - **Extended debug logging** - deselected
  - **Search in several threads** - selected
  - **Used cached mode** – selected
  - **Use proxy** – deselected
  
- After verifying all tabs, click **OK** to save any configuration changes.



## Revision History

Name	Date	Reason	Version
Tiffany Rubenstein	04/05/2012	Document created	1.0
Tiffany Rubenstein	04/09/2012	Added information regarding contacting ISPECs and Outlook 2003 and 2010 behavior	1.1



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