



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

WO CRM Outlook® Plug-in Upgrade Guide

Upgrade, Installation, and Verification Process

Confidential Information

Last updated:4/9/2012

Contents

INTRO	DUCTION	3
VERIF	Y CURRENT PLUG-IN VERSION	3
Оре	en Microsoft Outlook	3
DOWN		6
1.	Download the Installer	6
2.	Run the Executable	6
3.	Enter WideOrbit Credentials for Outlook Integration	8
4.	Select Start Menu Folder and Complete Installation	8
5.	Clean Up User's Desktop	8
VALID	ATE OUTLOOK PLUG-IN CONFIGURATION	9
VALID 1.	ATE OUTLOOK PLUG-IN CONFIGURATION Configure Outlook Plugin	9 9
VALID 1. 2.	ATE OUTLOOK PLUG-IN CONFIGURATION Configure Outlook Plugin Login Tab	9 9
VALID 1. 2. 3.	ATE OUTLOOK PLUG-IN CONFIGURATION Configure Outlook Plugin Login Tab Conflict Resolution Tab	9 9 9 10
VALID 1. 2. 3. 4.	ATE OUTLOOK PLUG-IN CONFIGURATION Configure Outlook Plugin Login Tab Conflict Resolution Tab Calendar Tab	9 9 10 10
VALID 1. 2. 3. 4. 5.	ATE OUTLOOK PLUG-IN CONFIGURATION Configure Outlook Plugin Login Tab Conflict Resolution Tab Calendar Tab Contacts Tab	9 9 10 10 10
VALID 1. 2. 3. 4. 5. 6.	ATE OUTLOOK PLUG-IN CONFIGURATION Configure Outlook Plugin Login Tab Conflict Resolution Tab Calendar Tab Contacts Tab Tasks Tab	9 9 10 10 10 11
VALID 1. 2. 3. 4. 5. 6. 7.	ATE OUTLOOK PLUG-IN CONFIGURATION Configure Outlook Plugin Login Tab Conflict Resolution Tab Calendar Tab Contacts Tab Tasks Tab Advanced Tab.	9 9 10 10 10 11 11

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

- 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.
 - If auto-update fails and your station is not yet live, contact your ISPEC. If your station is live, contact support@wideorbit.com.
 - 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.

WO CRM OUTLOOK PLUG-IN UPGRADE GUIDE

٧	VideOrbit Out	look Plug-In - Se	ttings						X
	Login Co	nflict Resolution	Calendar	Contacts	Tasks	Advanced	About		
	User name:	wodemo	11					1	
	Password:	******							
	Service URL	http://192.168.	.50.80:80/wo	sales/soap.	phr				
				Test					
			L						
	WIDEORBIT					Ok		Cancel	

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 if your station is live. Ask them to verify that the latest *update.xml* and *WideOrbit.SilentUpdater* files have been added to your server.

WO Sales Outlook Plug-in Update	9	x
You already have the latest version	on of WO Sales Out	ook plug-in installed.
	Ok	Cancel

• 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

lom	3						Create Conta	act Add Das	ihlets X Ad	tions 🔻
•	Click Install W	O Client	wo	SALES	Home	Account	s Opp	ortunities	Inventory	Res
	and select the	Installer		Isers: Home						
	executable wit	h Outlook			Users:	Administr	ator (adn	nin)		
	nlug-in 2 x x x		CI	reate New User	Employ	vee record	Traffic	Install W	0 Client	
	p106 11 21000		P Us	sers						
			In In	nport	-					
									Welco	m
	WO SALES	Home	Accounts	Opportunities	Inventory	Research	Analytics	Activities	Welco Other	m
	WO SALES Users: Home	Home	Accounts	Opportunities	Inventory	Research	Analytics	Activities	Welcon Other	TT (
	WO SALES Users: Home	Home To install WO	Accounts	Opportunities	Inventory	Research w:	Analytics	Activities	Welco Other	
	WO SALES Users: Home	Home	Accounts Client, downl t setup Versic	Opportunities	Inventory ne programs belo olug-in 2.2.1.3 Bui	Research w: Id Date: Decem	Analytics ber 8th, 2011	Activities	Welco Other	
	WO SALES Users: Home	Home To install WO WO Clien	Accounts Client, down t setup Versie t setup Versie	Opportunities	Inventory ne programs belo Jug-in 2.2.1.3 Bui cember 8tb 2011 Your plugi	Research w: Id Date: Decem	Analytics ber 8th, 2011 mber and b	Activities	Welco Other	TI I

 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 OUTLOOK PLUG-IN UPGRADE GUIDE

🔞 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 loca executable file manually.	ation of WOTRaffic
C:\WideOrbit\Sales\WOTraffic.exe	Browse
Driving the Rusiness of Advertising	
Shiring the udentices of Aurel tening -	> Cancel

😵 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 < Back Next > Cancel

• 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

WO Sales S Configure W Please provid	etup v2.0 with Outlook plug-in v2.2.1.3
Please enter You can skip	your credentials if you wish to configure WO Sales Outlook Sync plug-in. this step and configure it later.
🔽 Install Wo) Sales Outlook Sync plug-in
Username:	
Password:	
Driving the Busi	ness of Advertising
	< Back Next > Cancel

• 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.



	WideOrbit Outlook Plug-In - Settings
 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. 	Uogin Conflict Resolution Calendar Contacts Tasks Advanced About User name: wodemo
	WIDEORBIT Ok Cancel

3. Conflict Resolution Tab

- Please verify the following settings and adjust as needed to match:
 - o Meetings Manual
 - o Contacts Manual
 - Tasks Manual
 - o Calls Manual
 - Approve WO Sales Changes

 all checkboxes should be selected

WideOrbit O	utlook Plug-In - Se	ttings				Х
Login C	Conflict Resolution	Calendar	Contacts	Tasks	Advanced About	_
Select syn	chronization conflic	t resolution o	options		Approve WO Sales changes	
Meetings:	Manual			-		
Contacts:	Manual			•		
Tasks:	Manual			-		
Calls:	Manual			•		

WideOrbit Outlook Plug-In - Settings

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 III
 - Send attachments selected I
 - 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 III
 - Keep in sync* both selected Image: Selected Ima

*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.

Login Cor	flict Resolution	Calendar	Contacts	Tasks	Advanced	About	
Sync folder:						••• 🔒	
Meetings last	sync time: No	t synchroniz	ed yet				
Calls last syn	c time: Not syno	chronized ye	ŧ				
Allow priva	te events synchi	ronization					
Send attac	hments						
☑ Use time lin	nit during calend	dar items syr	chronization				
Load calenda	r items for last	30 days					
Keep in syr	C Jutlock startup						
Sync at C	nu 20 ·						
Sync eve	y 30 mil	nutes					
0					Ok		Cancel
WIDEORBIT					OK		Gancer

Login	Conflict	Resolution	Calendar	Contacts	Tasks	Advanced	About	
Sync fo	der:							
Contact	e laet evn	ctime: No	t synchroniz	ed vet				
Allow	privoto o		bronization					
Alow	private o	Untacts sync	monization					
Keep	in sync							
🗹 Syn	c at Outlo	ook startup						
Syn	c every	30 mir	nutes					
0						01		0
WIDEO	RBIT					Ok		Cancel

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.

Login	Conflict F	Resolution	Calendar	Contacts	Tasks	Advanced	About	
Sync fol	lder:							
asks la	ast sync tin	ne: Not syr	ichronized y	et				
Vse	time limit d	uring tasks	items synch	ronization				
Load ta	asks items	for last 30	days					
Keep	in sync							
V Syn	c at Outloo	ok startup						
🔽 Syn	c every	30 mii	nutes					
						01		Connel

Login Conflict Resolution Calendar Contacts Tasks Advanced About

Network / Logging settings

Extended Debug Logging

Search In Several Threads

Port: 80

Cancel

Ok

Log SOAP messages

Use "Cached Mode"

WideOrbit Outlook Plug-In - Settings

Archive

Proxy server

Address:

Password:

WIDE

Show context menu (on right click)

Display notification during background sync

Auto search by email addresses

Use proxy
Default
Custom

Bypass proxy server for local addresse

Reset sync data Change category colors

7. Advanced Tab

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



North American Headquarters:

1160 Battery Street Suite 300 San Francisco, CA 941111 +1.415.675.6700 www.wideorbit.com

Offices also located in:

- Agawam, MA
- Dallas, TX
- Denver, CO
- Seattle, WA
- Melbourne, AU

© 2012 WideOrbit Inc. All rights reserved.

Under the copyright laws, this manual may not be copied, in whole or in part, without the written consent of WideOrbit Inc. Every effort has been made to ensure that the information in this manual is accurate. WideOrbit is not responsible for printing or clerical errors. The information in this publication may change without notice.

WO Sales, WO Traffic, WO Automation for Radio, WO Promo, WO Central, WO Program, WO Mobile, WO Master Control, WO Cable Network Sales and Morning Edge are trademarks of WideOrbit.

Other company and product names mentioned herein are trademarks of their respective companies. Mention of third-party products is for informational purposes only and constitutes neither an endorsement nor a recommendation. WideOrbit assumes no responsibility with regard to the performance or use of these products.