



## WO CRM Quick Guide

### **Outlook Settings**

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#### **Open Outlook Settings**

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



#### Login Tab

- User name should be your *WO Traffic* username.
- Password should be your *WO Traffic* Password.

Alert: Each time you are prompted to change your password in *WO Traffic*, you will need to come here to update your password or you will **NOT** be able to sync from Outlook to *WO Sales*.

• Test connection functionality will be disabled until WO team arrival on site.

| Login   | Conflic | t Resolution | Calendar    | Contacts | Tasks | Advanced | About |        |
|---------|---------|--------------|-------------|----------|-------|----------|-------|--------|
| Jser na | me: a   | dmin         |             |          |       |          |       |        |
| asswor  | rd: *   | ****         |             |          |       |          |       |        |
| Service | URL: [  | WO TRAIN     | ER ENTER UF | RL HERE  |       |          |       |        |
|         |         |              | ſ           | Test     |       |          |       |        |
|         |         |              | l           | reat     |       |          |       |        |
|         |         |              |             |          |       |          |       |        |
|         |         |              |             |          |       |          |       |        |
|         |         |              |             |          |       |          |       |        |
|         |         |              |             |          |       |          |       |        |
|         |         |              |             |          |       |          |       |        |
|         |         |              |             |          |       |          |       |        |
|         |         |              |             |          |       |          |       |        |
|         |         |              |             |          |       |          |       |        |
|         |         |              |             |          |       |          |       |        |
|         |         |              |             |          |       |          |       |        |
| WIDE    | RBIT    |              |             |          |       | Ok       |       | Cancel |
| V       |         |              |             |          |       |          |       |        |

#### **Conflict Resolution Tab**

- Meetings should be set to Manual
- **Contacts** should be set to Manual
- Tasks should be set to Manual
- Calls should be set to Manual
- Approve WO Sales Changes all checkboxes should be selected IV

**Note:** These settings will be reviewed with other options available once WideOrbit staff is on site.

| WideOrbit O | utlook Plug-In - Settings  |                |       |            |                 | х |
|-------------|----------------------------|----------------|-------|------------|-----------------|---|
| Login       | Conflict Resolution Cale   | endar Contacts | Tasks | Advanced   | About           |   |
| Select syne | chronization conflict reso | ution options  |       | Approve W0 | O Sales changes |   |
| Meetings:   | Manual                     |                | *     |            | <b>V</b>        |   |
| Contacts:   | Manual                     |                | *     |            |                 |   |
| Tasks:      | Manual                     |                | •     |            | $\checkmark$    |   |
| Calls:      | Manual                     |                | *     |            | $\checkmark$    |   |
|             |                            |                |       |            |                 |   |
|             |                            |                |       |            |                 |   |
|             |                            |                |       |            |                 |   |

#### Calendar Tab

- Sync folder Point to your Outlook calendar.
   Click the ellipsis icon to change folders.
- Allow private events... deselected 🔳
- Send attachments selected IV
- Use time limit... selected 🗹
- Load calendar items... 30 days
- Keep in sync both deselected 🔳

**Note:** These options will be reviewed once WideOrbit staff is on site.

| ieOrbit Outlook Plug-In - Se | ttings   |   |  |  |   |   | X   |
|------------------------------|--|---|--|--|---|---|---|
|                              |  |   |  |  |   |   |   |
| Login Conflict Resolution    | Calendar   | Contacts  | Tasks  | Advanced   | About   |   |   |
| ync folder:                  |  |   |  | )  | 🔒   |   |   |
| feetings last sync time: Tu  | esday, July  | 19, 2011 8:4  | 0:41 AM  |  |   |   |   |
| Calls last sync time: Tuesda | y, July 19, 20                                       | 011 8:41:39   | AM   |  |   |   |   |
| Allow private events synch   | ronization   |   |  |  |   |   |   |
| Send attachments             |  |   |  |  |   |   |   |
| Use time limit during calend | lar items syn  | chronizatior  | n  |  |   |   |   |
| oad calendar items for last  | 30 days  |   |  |  |   |   |   |
| Keep in sync                 |  |   |  |  |   |   |   |
| Sync at Outlook startup      |  |   |  |  |   |   |   |
| Sync every 30 mi             | nutes  |   |  |  |   |   |   |
|                              |  |   |  |  |   |   |   |
|                              |  |   |  |  |   |   |   |
|                              | Login       Conflict Resolution         Sync folder: | Login       Conflict Resolution       Calendar         Sync folder: | Login       Conflict Resolution       Calendar       Contacts         Sync folder: | Login       Conflict Resolution       Calendar       Contacts       Tasks         Sync folder: | Login       Conflict Resolution       Calendar       Contacts       Tasks       Advanced         Sync folder: | Login       Conflict Resolution       Calendar       Contacts       Tasks       Advanced       About         Sync folder: | Login       Conflict Resolution       Calendar       Contacts       Tasks       Advanced       About         Sync folder: |

#### **Contacts Tab**

- Sync folder Point to your Outlook contacts.
   Click the ellipsis icon to change folders.
- Allow private events... deselected 🗏
- Keep in sync both deselected III

**Note:** These options will be reviewed once WideOrbit staff is on site.

| WideOrbit Outlook Plu                            | g-In - Settings                          |                         |         |            |           | Х |
|--|--|-------------------------|---------|------------|-----------|---|
| Login         Conflict Re           Sync folder: | solution Calendar<br>me: Tuesday, July 1 | Contacts<br>9, 2011 8:4 | Tasks / | Advanced . | About<br> |   |
| Allow private conta                              | acts synchronization                     |                         |         |            |           |   |
| Sync at Outlook                                  | startup<br>30 minutes                    |                         |         |            |           |   |
|  |  |                         |         |            |           |   |

#### Tasks Tab

- Sync folder Point to your Outlook calendar.
   Click the ellipsis icon to change folders.
- Use time limit... selected 🗹
- Load tasks items... 30 days
- Keep in sync both deselected 🔳

**Note:** These options will be reviewed once WideOrbit staff is on site.

| Login Co          | nflict Resoluti | on Calendar      | Contacts     | Tasks 📝    | dvanced | About |  |
|-------------------|-----------------|------------------|--------------|------------|---------|-------|--|
| Sync folder:      |                 |                  |              |            |         |       |  |
| ,<br>Taaka laat o | no timo: Tuo    | odov July 10.0   | 0011 0-41-00 | <b>AN4</b> |         |       |  |
| lasks last s      | nc ume. Tue     | sday, July 19, 2 | 0110.41.067  | AM         |         |       |  |
| Use time          | imit during ta  | sks items synch  | ronization   |            |         |       |  |
| Load tasks        | tems for last   | 30 days          |              |            |         |       |  |
| Keep in sy        | nc              |                  |              |            |         |       |  |
| Sync at           | Outlook startu  | ıp               |              |            |         |       |  |
| 🗉 Sync eve        | <b>ry</b> 30    | minutes          |              |            |         |       |  |

#### Advanced Tab

- Show context menu on right click selected Image:
- Display notification during... deselected
- Auto search by email addresses selected Image: Selected Image:
- Log SOAP messages\* deselected
- Extended debug logging\* deselected
- Search in several threads selected
- Used cached mode selected 📝
- Use proxy deselected 🗉

**Note:** These options will be reviewed once WideOrbit staff is on site.

\*These items are used during troubleshooting and should only be checked if requested by WideOrbit Support staff.

| 3                     | Conflict Reso     | ution Calen      | dar Contacts              | Tasks       | Advanced      | About    |
|-----------------------|-------------------|------------------|---------------------------|-------------|---------------|----------|
| Show                  | v context menu    | (on right click) |                           | Network     | / Logging set | ttings   |
| Displ                 | ay notification d | uring backgro    | und sync                  | Log SC      | AP message    | s        |
| Archiv                | /e                |                  | Extend                    | ed Debug Lo | gging         |          |
| Auto                  | search by ema     | il addresses     | Search In Several Threads |             |               |          |
|                       |                   |                  |                           | IV Use "C   | ached Mode    |          |
| Reset                 | t sync data       | Change cate      | gory colors               |             |               |          |
| Proxy                 | server            |                  |                           |             |               |          |
| Cust                  | proxy  © De       | fault ©Cu        | istom                     |             |               |          |
| Addre                 | ess:              |                  |                           |             |               | Port: 80 |
|                       | name:             |                  |                           |             |               |          |
| User                  |                   |                  |                           |             |               |          |
| User<br>Passv         | word:             |                  |                           |             |               |          |
| User<br>Passv<br>Ø By | word:             | er for local ad  | dresses                   |             |               |          |

#### About Tab

- Version Displays the current version number of the WO Sales Outlook plug-in.
- Build Date Displays the build date of the WO Sales Outlook plug-in.
- Check for Updates Clicking this button will check for a more recent version of the WO Sales Outlook plug-in. If your version won't update or the update fails, please contact your local IT department.

| Login   | Conflict Resolution        | Calendar         | Contacts      | Tasks      | Advanced       | About      |           |
|---------|----------------------------|------------------|---------------|------------|----------------|------------|-----------|
|         |                            | WideO            | rbit Outlook  | Plug-In    |                |            |           |
|         |                            |                  |               |            |                |            |           |
|         | Driving the l              | Business of Adv  | vertising     |            |                |            |           |
|         | MO                         | CALE             |               | WIE        | DECRBIT        |            |           |
|         | VVU                        | SALE             | :5            |            | v              |            |           |
|         | Convicto                   | 2010 1464-0      |               |            | Dishts Daara   |            |           |
| Version | Copyright ©.<br>I: 2.2.1.7 | 2010 WideOr      | bit, incorpor | ated. All  | Rights Reser   | vea.       |           |
| Build D | ate: Monday, Marc          | ch 26, 2012      |               |            |                |            |           |
|         |                            |                  |               |            | Chee           | ck for up  | dates     |
|         |                            |                  |               |            |                |            |           |
|         |                            |                  |               |            |                |            |           |
|         |                            |                  |               |            |                |            |           |
| Warr    | ning: This program is p    | protected by     | copyright lav | v and inte | rnational trea | ties. Unai | uthorized |
| crimina | al penalties. Known vic    | lators will be p | prosecuted t  | o the max  | kimum extent   | possible   | under the |
|         |                            |                  | idW.          |            | -              | _          |           |
|         |                            |                  |               |            | Ok             |            | Canaal    |

# Alert: <u>AFTER ALL SETTINGS 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            | 1.0     |
|                    |            | template. Content updated to v2.2. |         |