

WO CRM Quick Guide

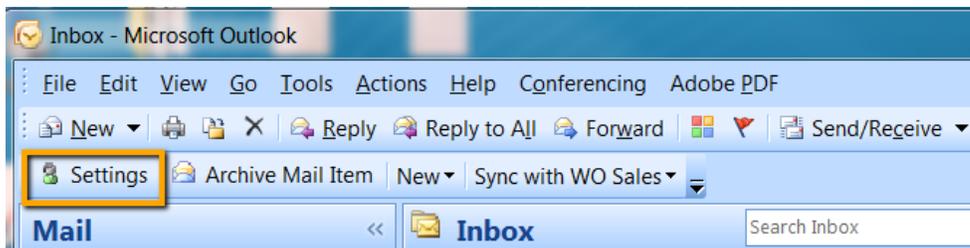
Outlook Settings

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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.

WideOrbit Outlook Plug-In - Settings

Login Conflict Resolution Calendar Contacts Tasks Advanced About

User name: admin

Password: *****

Service URL: WO TRAINER ENTER URL HERE

Test

Ok Cancel

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



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

WideOrbit Outlook Plug-In - Settings

Login Conflict Resolution Calendar Contacts Tasks Advanced About

Select synchronization conflict resolution options

Meetings: Manual

Contacts: Manual

Tasks: Manual

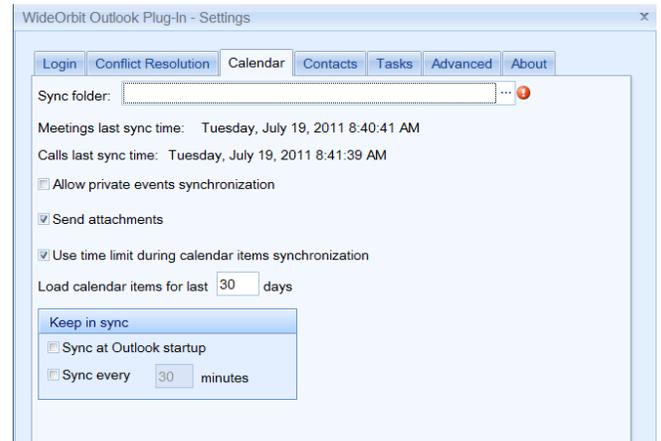
Calls: Manual

Approve WO Sales changes

Calendar Tab

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

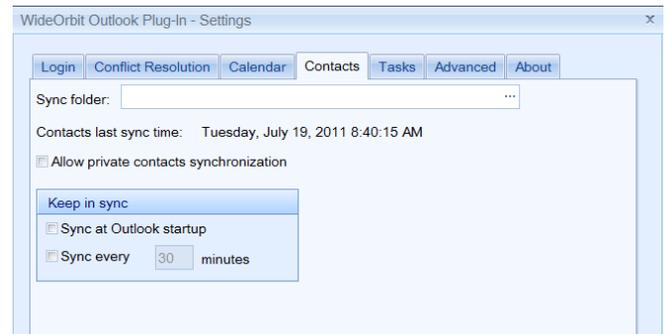
 **Note:** These options will be reviewed once WideOrbit staff is on site.



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

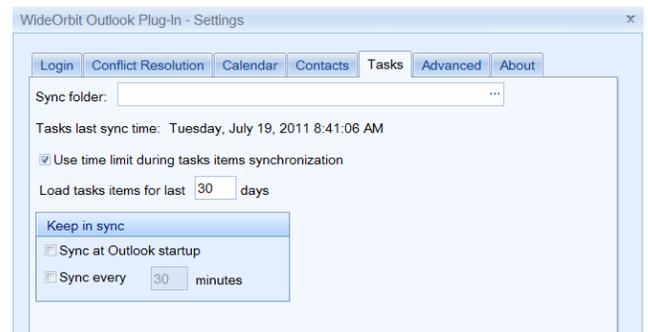
 **Note:** These options will be reviewed once WideOrbit staff is on site.



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.

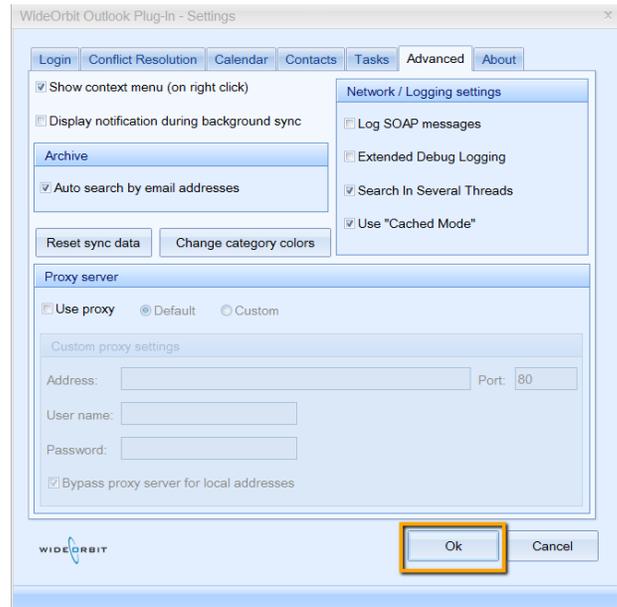


Advanced Tab

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

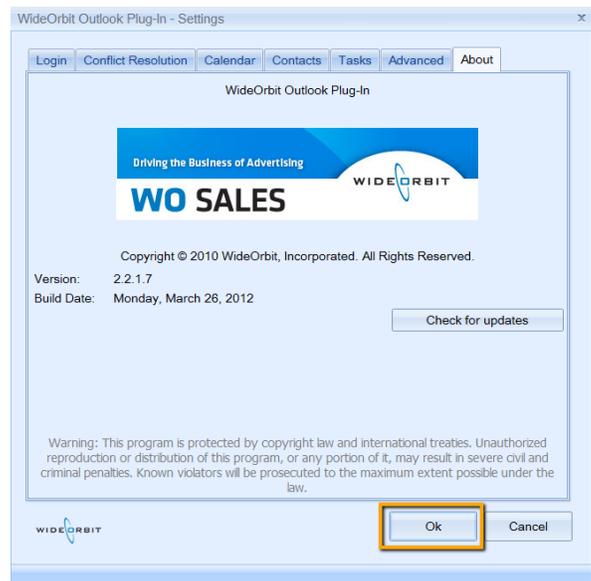
 **Note:** These options will be reviewed once WideOrbit staff is on site.

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



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.



 **Alert:** AFTER ALL SETTINGS ARE COMPLETED, 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