WO Sales Desktop Client Install Set-Up V2.0
(With Outlook Plug-in Option)

WideOrbit
***WO Sales* Installation Guide**

WO Sales Client Installer

Wizard Install and Verification
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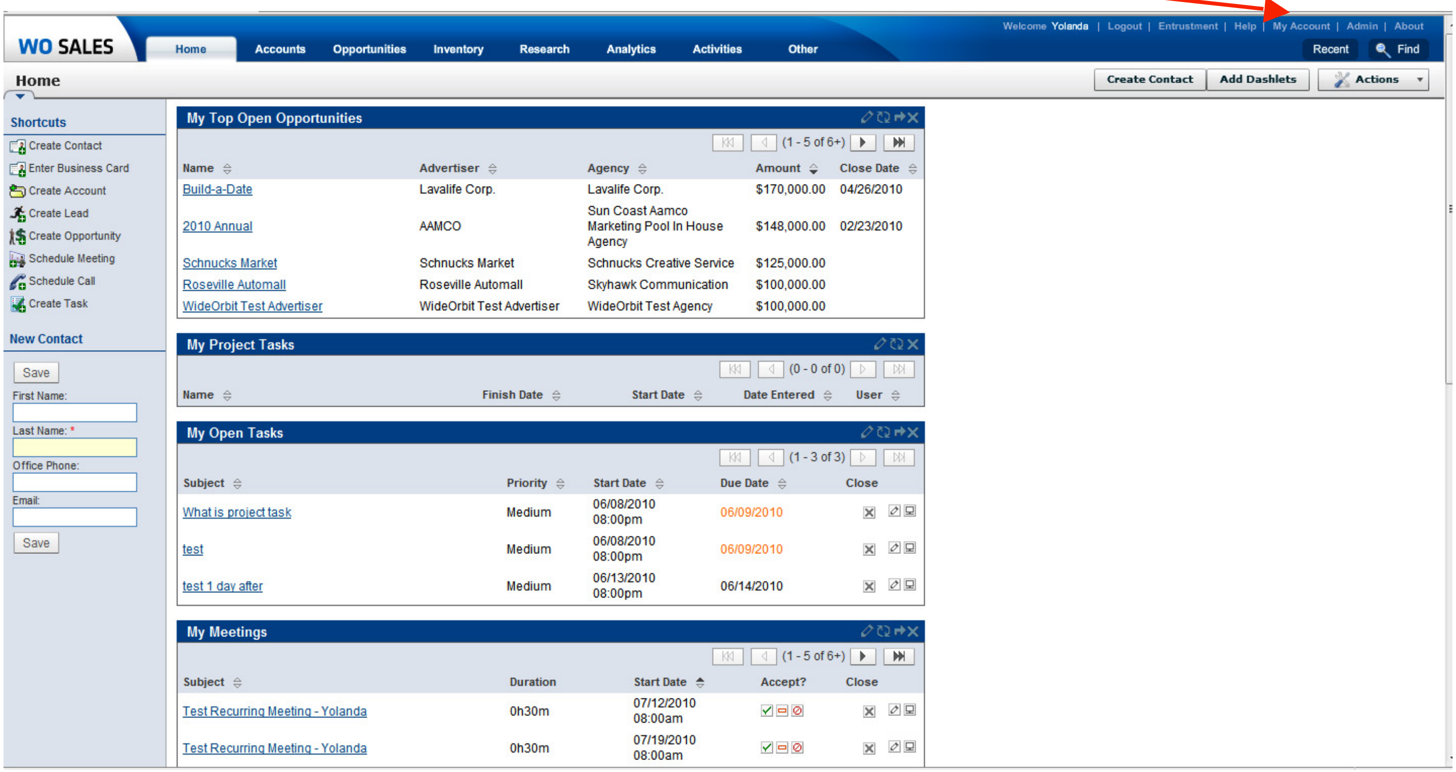
Outlook Integration

The *WO Sales* Client Installer configures CRM with Outlook so they can be integrated. This integration allows you to create calendar events, notes, and tasks in either *WO SALES* CRM or Outlook and then easily sync the two. You may also archive emails for future reference by associating them to appropriate items in CRM. In addition, the Client Installer configures the appropriate traffic executable, includes a "test" login, and applies the needed certificates for exporting Excel reports.

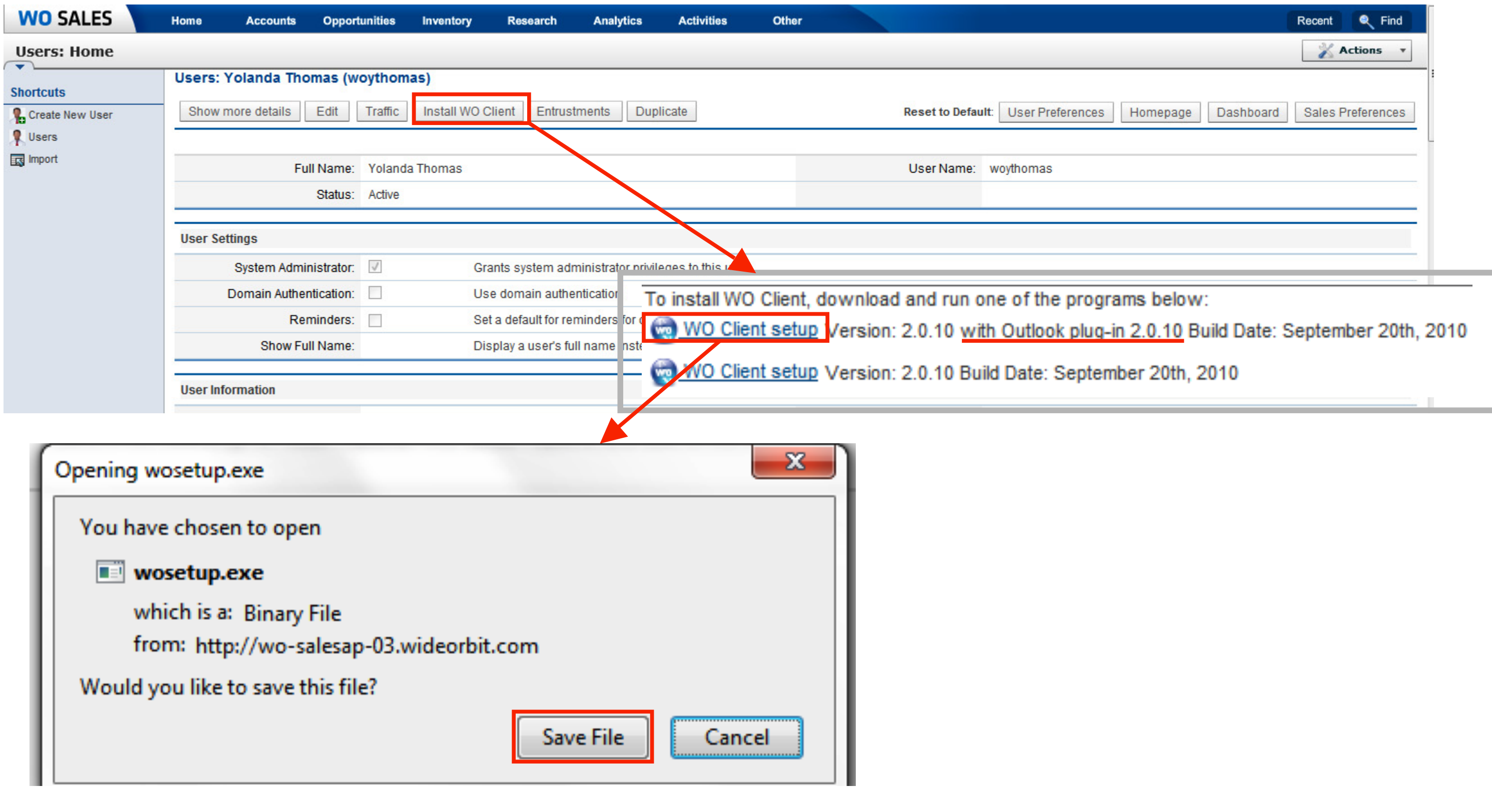
1. Accessing the *WO Sales* Client Installer

Download the *WO Sales* Client Installer, which can be found in the *WO Sales* application. ***You will be provided a WO Sales application link by the WO Sales team. The log-in username and password will be the same as your log-in for WO Traffic. Please be sure that you are signed out of Outlook before executing the plug-in installation.***

- Log-in to *WO Sales* and **click the "My Account"** tab at the top right.



- Clicking on "Install WO Client" takes you to the link with the installer executable. **Please select the link that has with Outlook plug in 2.0.xx** Note*: choose to save the file to your desktop.*



- The next step is to work through the *WO Sales Installer* set up wizard. To begin using the wizard, **double click** on the **wosetup.exe** file that was provided. This may place a shortcut on your desktop or you may see the selection in a download dialogue box.

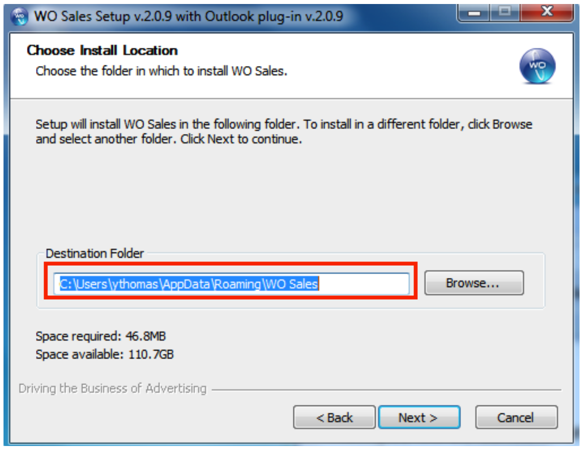
2. Set up Wizard

Begin by reading the initial wizard page.

- Click Next

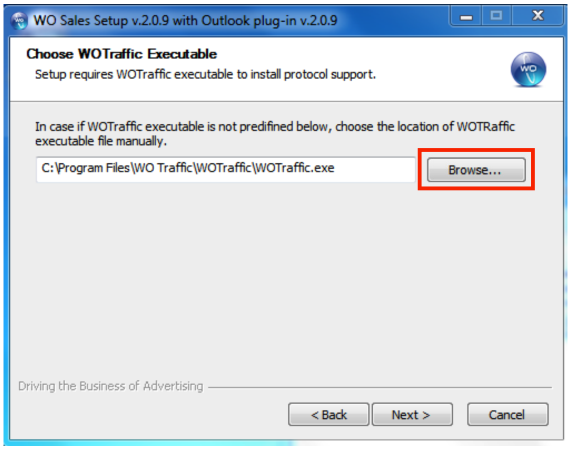
Next you will be asked where the *WO Sales* program files should reside.

- Typically the default settings will remain in place. You may however browse for a different location if you choose.
- Click **Next**



If it does not pre-populate, you will need to browse for the *WO Traffic* executable file. Your IT Personnel should be aware of the location path for the Traffic executable.

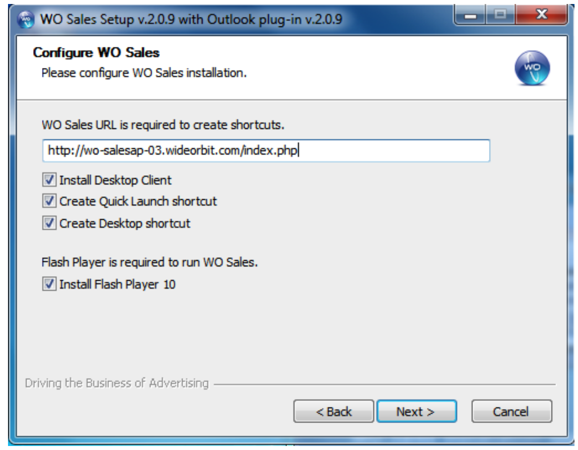
- Click **Next**



In the next step of the wizard you will be asked to provide the URL for the *WO Sales* application. Simply enter the web address in the field provided. **The URL will be the same link that was sent to you by the *WO Sales* team – the link that you used to open WO Sales initially when accessing the WO Client Installer.**

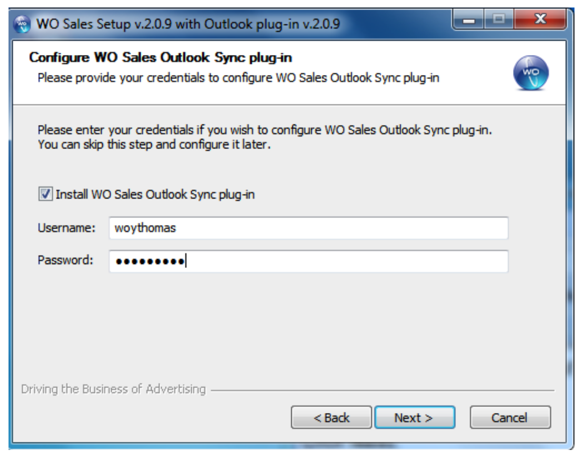
Note: The options listed should default to enabled. Please ensure that all 4 options are checked:

- *Install Desktop Client*
- *Create Quick Launch Shortcut*
- *Create Desktop Shortcut*
- *Install Flash Player 10*



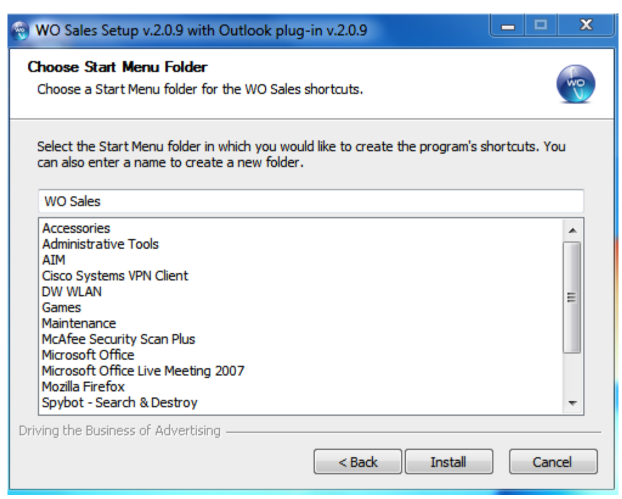
Next enter your ***WO Sales*** Username and Password. This will be the same as your log-in information for *WO Traffic*. Be sure the **Install WO Sales Outlook Sync plug-in** box is checked.

- Click **Next**

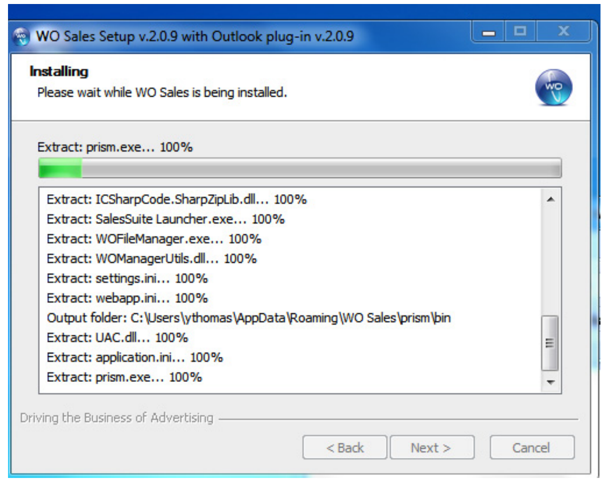


The next step in the set up wizard is to designate the Start up folder you wish to use for short cuts. This field should pre-populate.

- Click **install** to continue the set-up wizard

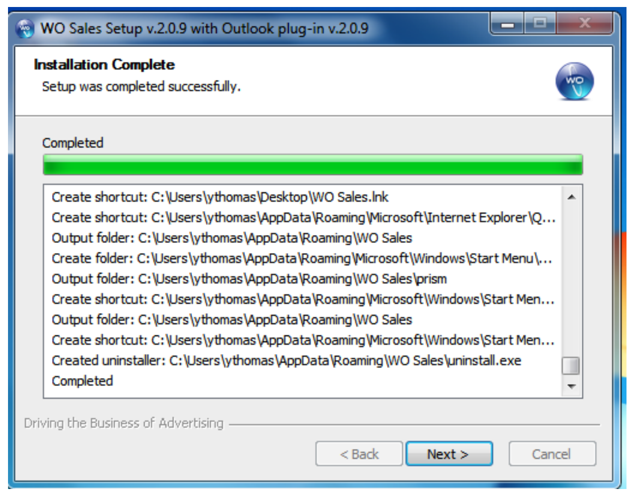


The Installer will begin running. A log window will display while the installation is processing.



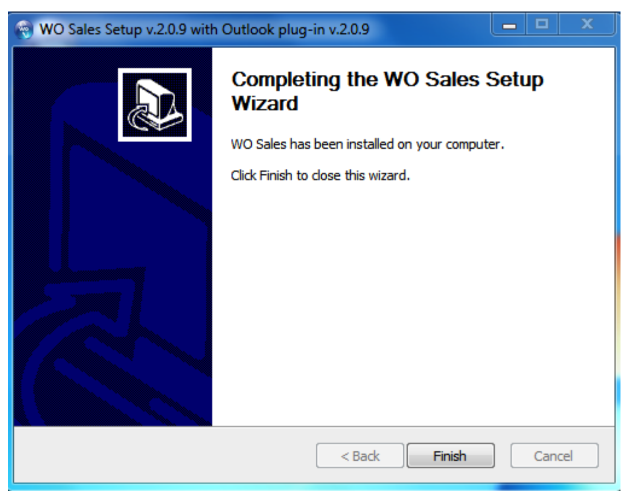
When the installation is complete the window will display **Installation Complete** - Setup was completed successfully.

- Click **Next**



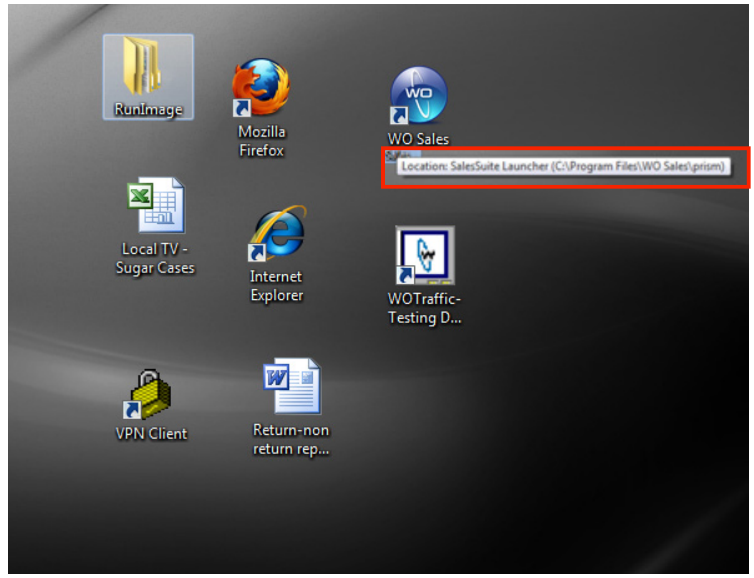
The final window will display the wizard installation is completed.

- Click **Finish**

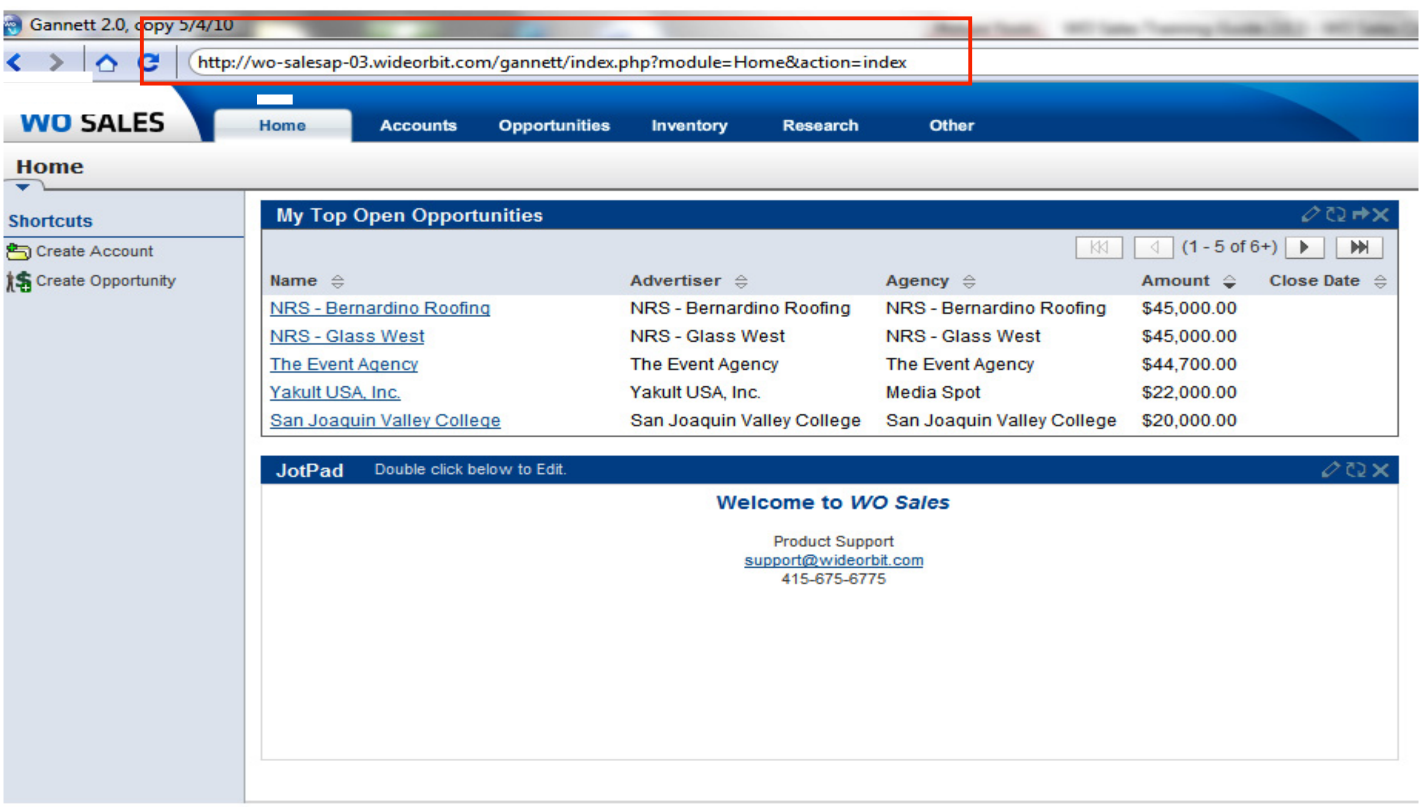


3. Verification Process of WO Desktop Client Install

- A *WO Sales* shortcut icon will be placed on the desktop. Hover over the WO Sales shortcut icon. Please make sure the location has the correct label. *It is very Important that the last item on the location says "prism"*

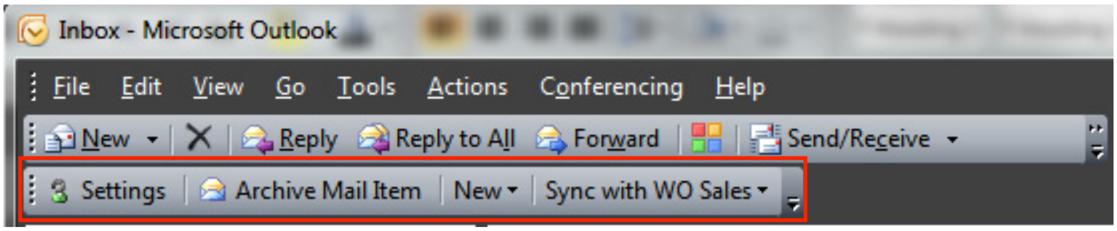


- Double-click on the *WO Sales* Shortcut icon and check that all menu tabs are displayed within the application *(Figure below)*. If you do not see the menu tabs, you may not have had the flash player 10 option selected during the wizard. You must restart the WO Client Install Wizard.
- Users should now **ONLY** use the WO Sales shortcut icon with the "prism" browser.
  - Delete any "old" *WO Sales* browser shortcut on the desktop
  - Delete any favorites or bookmarks in all browsers; Internet Explorer, Google Chrome, Mozilla Firefox



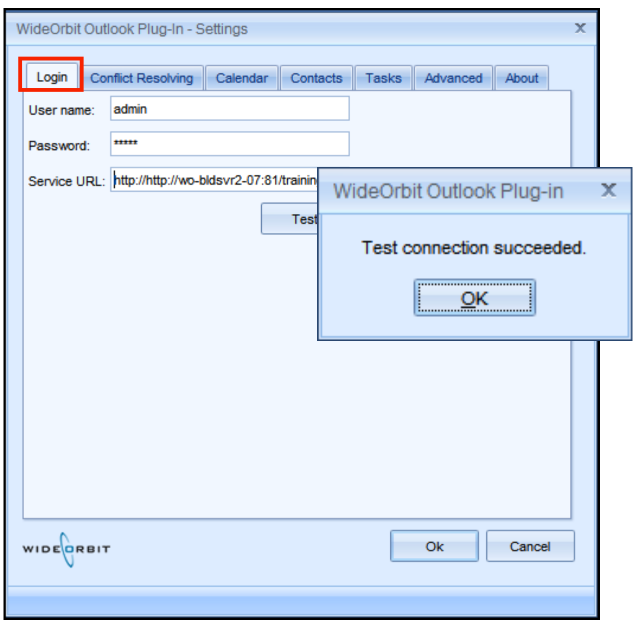
4. Synchronizing *WO Sales* CRM to Outlook

Following the completion of the set up wizard, once Outlook is opened, a new *WO Sales* toolbar will appear in the header of the Outlook window.



*Note: If the WO SALES tool bar does not automatically appear, click **View** then **Toolbars** to select the WO SALES toolbar.*

Click the **Settings** menu from the *WO SALES* tool bar, which opens the Settings window.



LOGIN TAB

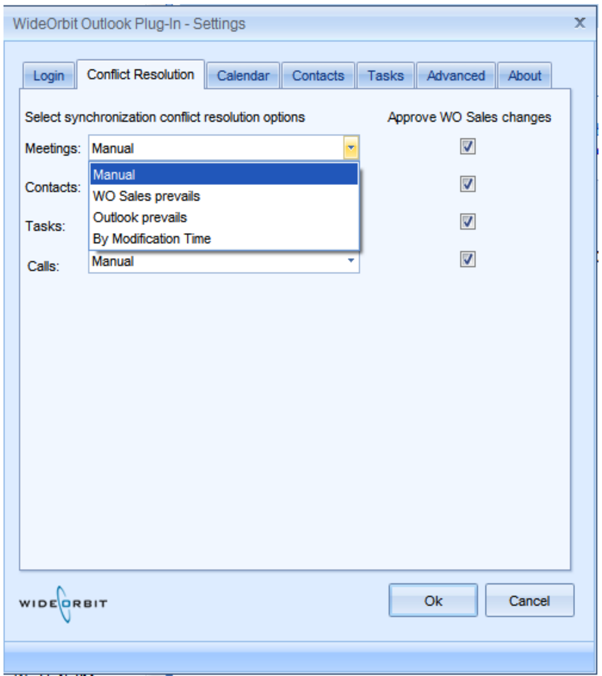
- To ensure your link to *WO Sales* is working correctly, click on the Login tab on the settings window. This reveals the fields for your user name, password and URL. The Service URL should be the URL link for *WO Sales*.
- Click on the "Test" button to run a quick diagnostic which checks to make sure you are successfully connecting to the service.
- **Test Connection Succeeded** should appear.

New Clients

NOTE: If you have not yet had your WideOrbit installation team on-site, if this is a brand new installation for your station, the Test button will not work. Testing is disabled to prevent any unintentional sync operations but Outlook sync functionality will be enabled by your Implementation Specialist at the time of your install.

- **Changing your User name or Password:**
  - If you change either in *WO Traffic* your *WO Sales* username and password will automatically update.
  - It is mandatory that you open this settings window in Outlook and manually change your username or password when you change them in *WO Traffic*.

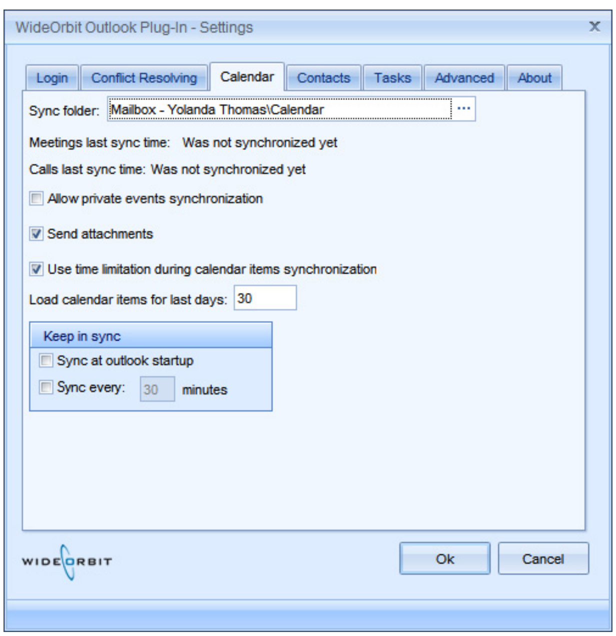
  Note: *WideOrbit Sales* v2.1 will provide notification when your password has expired or changed in *WO Traffic*.



CONFLICT RESOLUTION TAB

You can determine how to resolve conflicts between Outlook and *WO Sales*. Select the tab marked Conflict Resolution.

- "Manual" allows the user to select which conflicting entry is correct. ***During the initial set-up, this is the recommended setting***.
- "*WO Sales* prevails" assumes that the entry made on the WO Sales side is the correct.
- "Outlook prevails" assumes that the entry made via Outlook is correct.
- "By Modification Time" considers the most recent entry to be correct.
- "Approve *WO Sales* changes" allows the user to decide whether to accept any change made within WO Sales before it applies to the Outlook entry. When unchecked, changes will automatically apply. When checked, the user will see a popup window when there is a change, allowing them to approve the change.



CALENDAR TAB

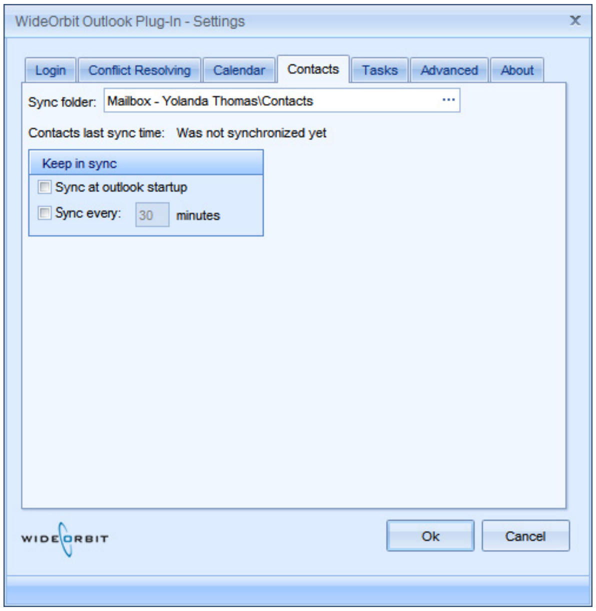
- Under Calendar tab the Sync folder field should automatically default to your calendar folder.
- You will use your "Contacts" folder and mark personal contacts to **exclude** from synchronization. (see page 13 for instructions on excluding items from sync)

WO Recommended Set-up

- Uncheck the option for Allow Private events synchronization-this will allow for events marked as private in outlook to not sync into *WO Sales*
- Check - Send Attachments option
- Check - Use time limitation during calendar synchronization

The System will default to loading calendar items from the past 30 days. The number of days can be customized.

***Keep in sync** options should remain unchecked until WO Sales and Outlook has been confirmed to work properly by your WO Sales installation team. Users will have the option to adjust the **Keep in sync** option based on their personal preference after confirmation.*



CONTACTS TAB

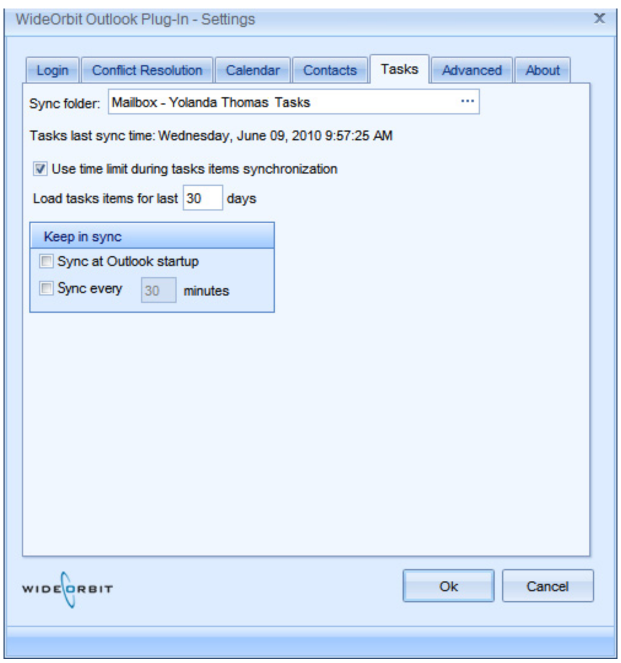
- Under the Contacts tab the Sync folder field should automatically default to your contacts folder.

Keep in sync *options should remain unchecked until WO Sales and Outlook has been confirmed to work properly.*

*Users will have the option to adjust the **Keep in sync** option based on their personal preference after confirmation.*

Sync at outlook startup will allow the user to auto-sync each time they sign in to outlook.

Sync every ___ minutes, will allow the user to auto-sync at different intervals of time.



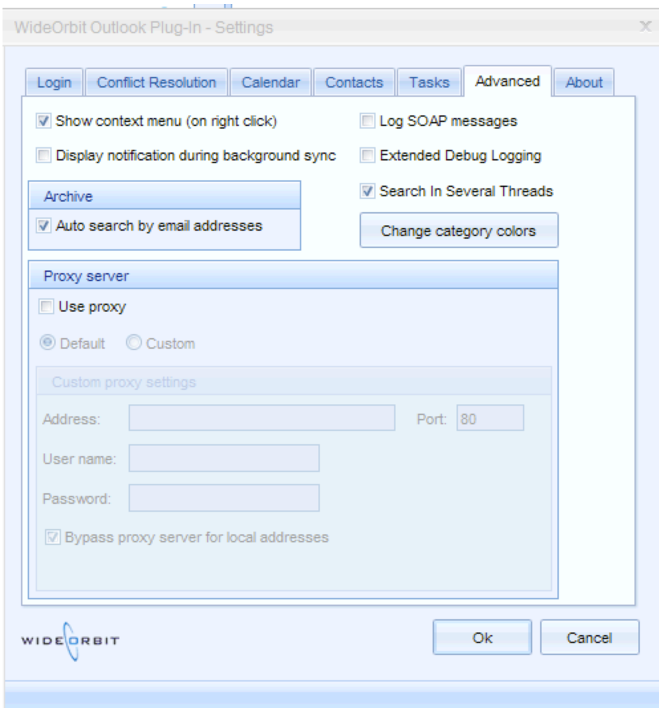
TASKS TAB

- Under the Tasks tab the Sync folder field should automatically default to your tasks folder.

The System will default to loading task items from the past 30 days. The number of days can be customized.

Keep in sync *options should remain unchecked until WO Sales and Outlook has been confirmed to work properly. Users will have the option to adjust the **Keep in sync** option based on their personal preference after confirmation.*

- **This is currently the recommended approach for WO Sales users. *Note: Any sub-folders created in Outlook under you Contacts, Calendar or Tasks folders will still sync to WO Sales. Please contact WideOrbit support with any sub-folder questions.***
- If you need to create an additional folder for *WO Sales* Contacts, Tasks or Calendar to separate business and personal items, please contact *WO Sales* support. *Note: if you have a PDA/phone configured to sync with Outlook contacts, you need to coordinate with your IT department or phone provider to update the configuration, providing your phone equipment and provider support configuration to multiple contact folders.*



ADVANCED TAB

Under the Advanced tab:

WO Recommended Set-up

- Check the option to “Show context menu” – this will enable Right-Click Menu functionality
- Check Search in Several Threads
- Check Archive- Search by email addresses

The following items are trouble-shooting outlook features and should be left unchecked unless notified by WideOrbit.

- Uncheck - Display notification during background sync
- Uncheck - Log SOAP messages
- Uncheck - Extended Debug Logging

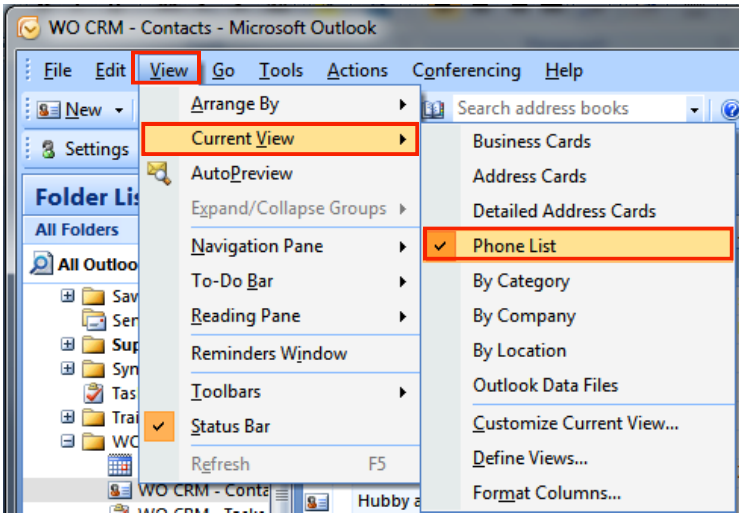
Use Proxy Server should default to unchecked

ABOUT TAB

The about tab will give you general information on what version of *WO Sales* you are currently utilizing. This will be helpful when contacting support with issues.

Excluding personal Contacts, Calendar events and Tasks from sync

Listing your contacts, calendar events and tasks in a “List View” you can easily select all private items to exclude from sync.

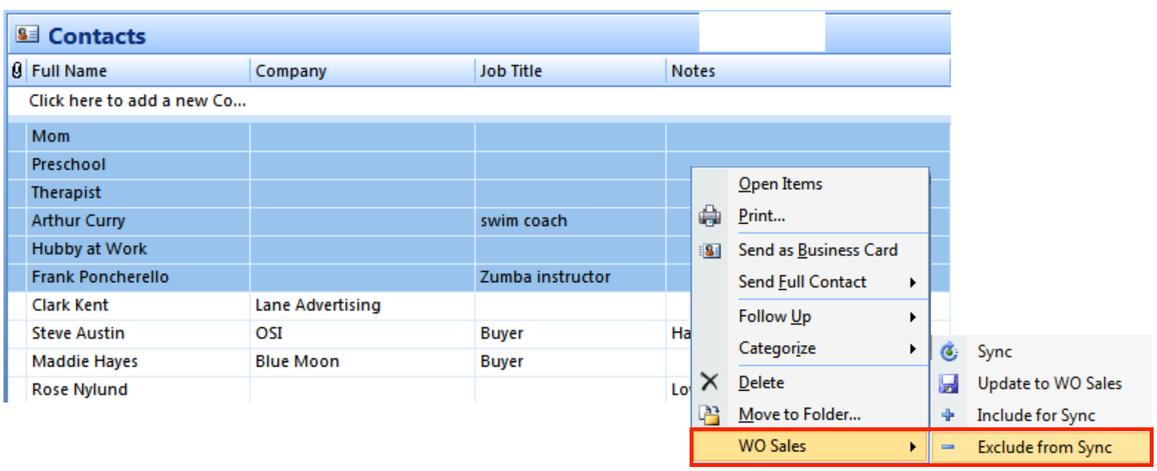


Calendar
VIEW→CURRENT VIEW→All Appointments

Contacts
VIEW→CURRENT VIEW→Phone List

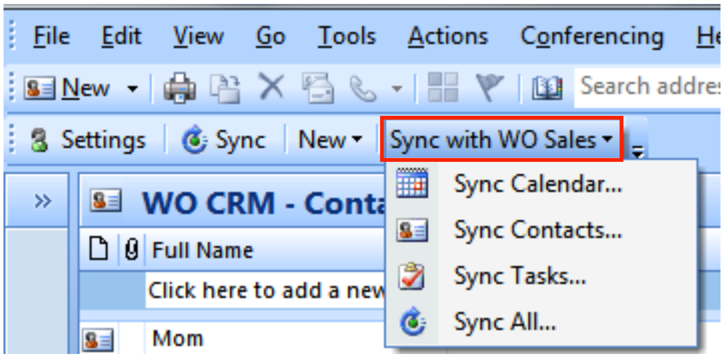
Tasks
VIEW→CURRENT VIEW→Simple List

In list view you can easily multi-select, using your CTRL or Shift keys, any private items that you do not want to sync with CRM. Right-click to access the right-click menu and select WO Sales→Exclude From Sync



Inside a contact or calendar event record you can mark the item as Private by clicking the Private lock at the top of the form. Marking and item as Private will exclude that item from sync. *Note: Marking a Task as Private will NOT exclude that task from sync.*

During the initial set-up, WideOrbit recommends that users “Exclude Item from Sync” via the right-click menu for all personal items.



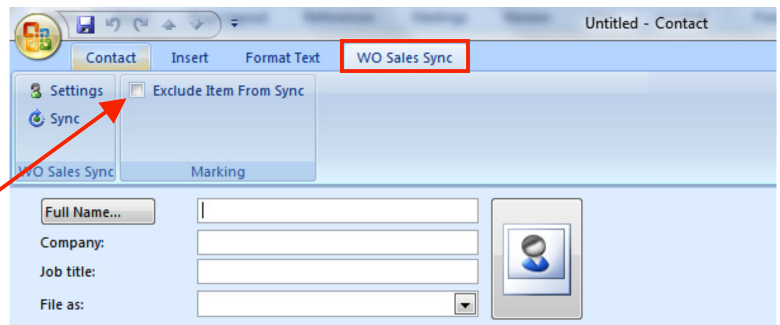
Once the setup is complete, Outlook and CRM can be synchronized.

- **From the *WO SALES*** tool bar on your Outlook header click on the **Sync with WO SALES** menu and select the category you wish to sync.

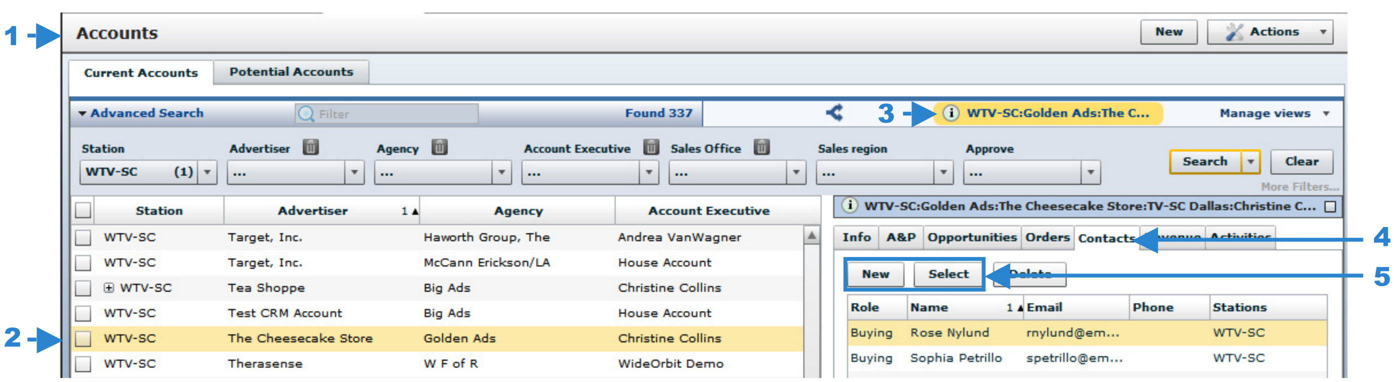
The "Sync All" option will sync each category (meeting, contacts, tasks, and calls) simultaneously.

Creating Contacts

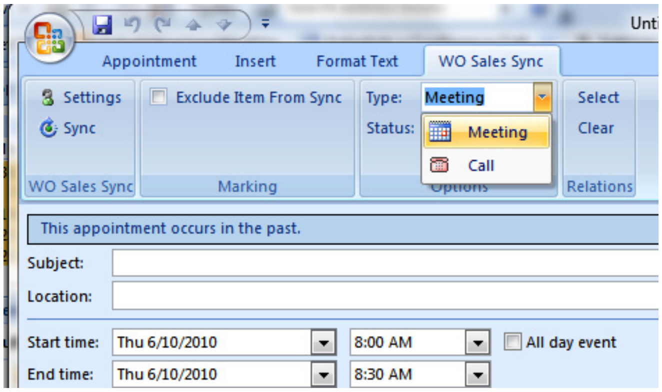
- Create a New contact using the standard Outlook form.
- In the menu bar above the form select the **WO Sales Sync** tab.
- Here you have the option to **Exclude Item from Sync** by checking the box if it not a client related contact.



Contacts can be associated to a CRM account via *WO Sales* CRM Accounts (1).
Select the appropriate Account from a generated list (2) and access the Information Panel (3).
On the Contacts tab (4) you have the option to create a New contact or Select (5) from all CRM and Outlook contacts in the system.



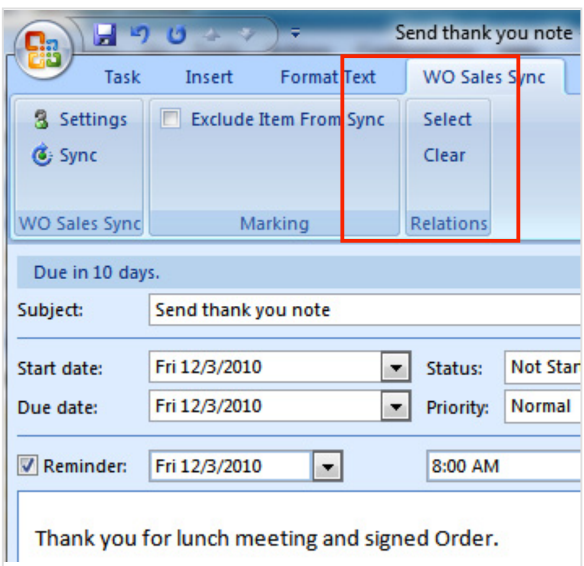
Creating Calendar Events



- Create appointments utilizing the standard Outlook form.
- In the menu bar above the form select the *WO SALES Sync* menu.
- The **Type** menu allows you to designate the appointment as a Meeting or a Call. The **Status** menu allows you to attach a status of Planned, Held or Not Held to the appointment.
    - Marking an appointment as a call can be helpful in that it will appear in CRM as a call and can be tracked for call lists.

- Again, by default this event will sync unless you opt to **Exclude Item from Sync**.

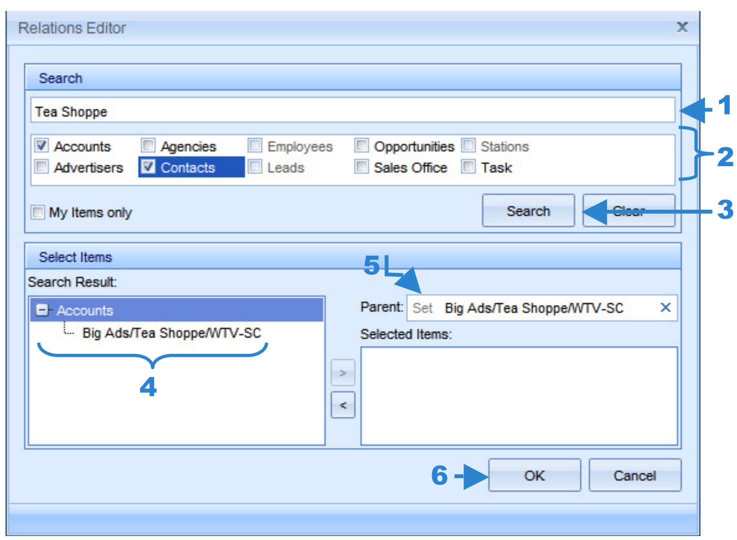
Associating Calendar events and Tasks to CRM Accounts



Meetings, Calls and Tasks can be associated to an item in CRM and referenced in the future.

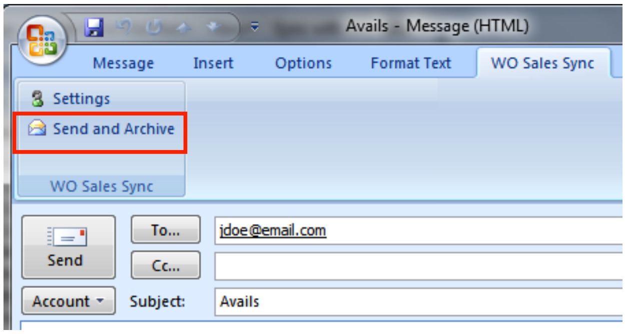
- Navigate to the WO Sales Sync tab inside an Calendar event or Task record
- The box on the far right is titled Relations
- Click the Select option to open the Relations Editor

The **Relations Editor** window allows you to search CRM for any phrase entered in the top search field (1).
Select CRM areas (2) that you want the system to search in and click the **Search** button (3).
Results appear in the lower left panel (4).
Highlight any result by clicking on it.
Click the **Set** button (5) in the right panel to link the selected item to the Task or Calendar event.
Click the **OK** button to confirm (6).

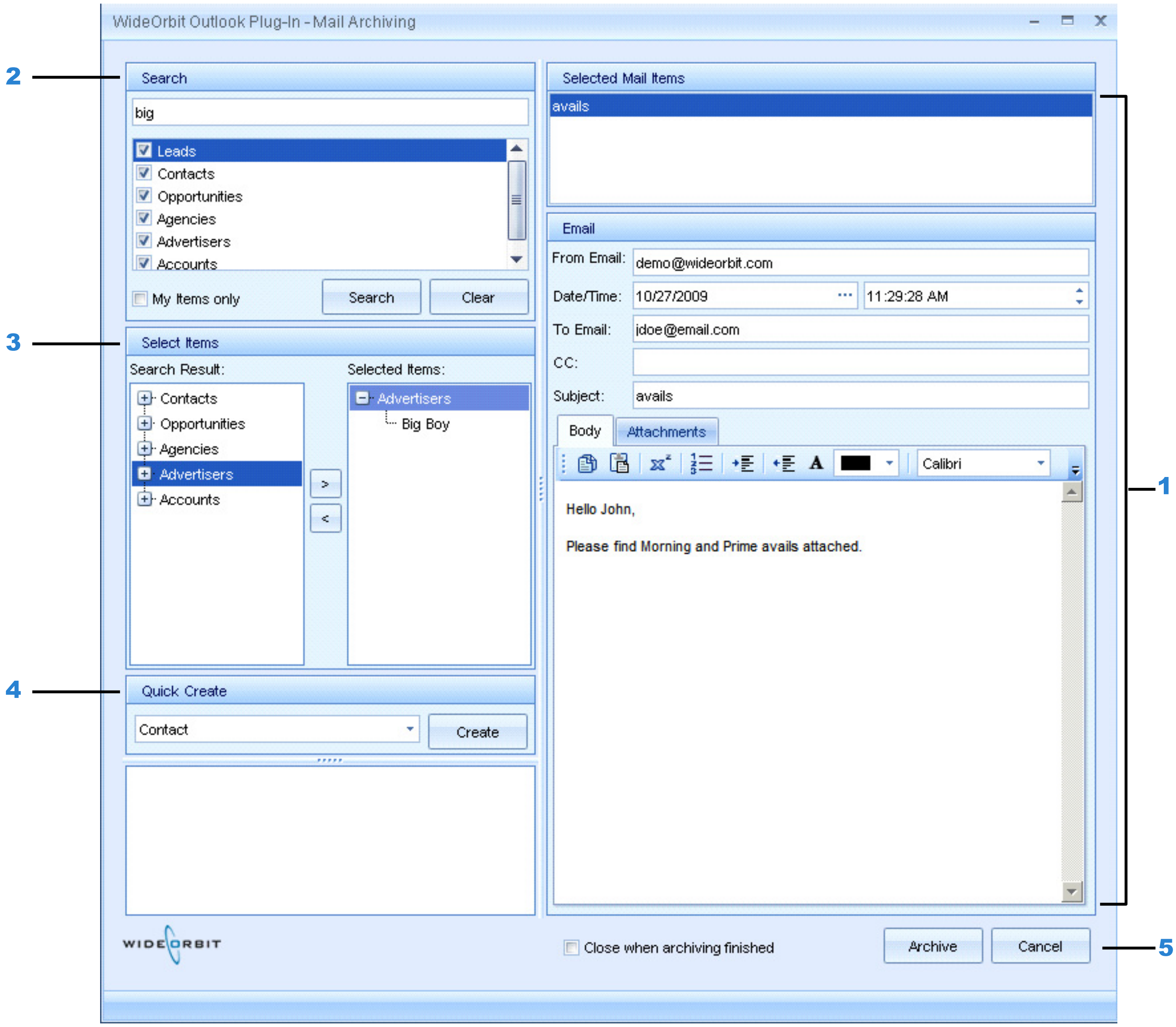


Creating Archived Emails

Archived emails are saved and associated to an item in *WO Sales* CRM, such as Advertisers, Agencies and Contacts.



- Create an email in the standard Outlook form.
- In the menu bar above the form select the *WO SALES* CRM Sync menu.
- When the email is complete, click the Send and Archive option.



Mail Archiving window

1. **Email** – The email to be archived can be seen on the right side of the screen. Enter notes in the body of the email if you would like. And manage any attachments on the original email by clicking the Attachments tab. You can remove attachments via this tab or include one or multiple attachments if the original email contained more than one attachment.

2. **Search** – The search feature allows you to search for a specific item in several CRM areas. Type an entry in the search field, then check one or several categories and click the **Search** button.

3. **Select Items** – Items returned in a search appear in the middle left panel. Highlight items and click the arrows to move them between columns. Emails will be associated with items in the Selected Items column.

4. **Quick Create** – Use the pull down menu to select Agency, Advertiser or Contact and click the **Create** button. Items created using the Quick Create method will automatically appear in the Selected Items column and will appear in CRM.

5. **Archive button** – Click the **Archive** button to associate the email to the selected items.

Note: Archived emails can be viewed and read in CRM in the History section of an item associated to the email. Or in the Information Panel on the Activities tab for any Account the email is linked to.