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 Outlook Integration

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Version 2.0.1 (With Outlook Plug-in Option) Updated: 11/23/10

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.

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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.

SALES	Home Accounts Opportunitie	s Inventory Research	Analytics Activi	ties Other	
ome					
teute	My Top Open Opportunities				00 ⇒ ×
create Contact				KA 0 (1 - 5 of 6	6+)
Enter Business Card	Name 😄	Advertiser 👙	Agency ⇔	Amount 🖨	Close Date ⊜
Create Account	Build-a-Date	Lavalife Corp.	Lavalife Corp.	\$170,000.00	04/26/2010
reate Lead Create Opportunity	2010 Annual	AAMCO	Sun Coast Aamco Marketing Pool In House Agency	\$148,000.00	02/23/2010
Schedule Meeting	Schnucks Market	Schnucks Market	Schnucks Creative Servi	ce \$125,000.00	
chedule Call	Roseville Automall	Roseville Automall	Skyhawk Communication	n \$100,000.00	
ate Task	WideOrbit Test Advertiser	WideOrbit Test Advertiser	WideOrbit Test Agency	\$100,000.00	
Contact	My Project Tasks				/70×
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ce Phone:			[Ki (1 - 3 of	f 3) 🔃 🕅
	Subject	Priority 👙	Start Date 👙 🛛 🛛	Due Date 😄	Close
ail:	What is project task	Medium	06/08/2010 08:00pm	06/09/2010	×Z
lave	test	Medium	06/08/2010 08:00pm	06/09/2010	
	test 1 day after	Medium	06/13/2010 08:00pm	06/14/2010	XZQ
	My Meetings				ØQ₽X
				KA (1 - 5 of 6	6+)
	Subject	Duration	Start Date 🌲	Accept?	Close
	Test Recurring Meeting - Yolanda	0h30m	07/12/2010 08:00am	V 🗆 Ø	×
	Test Recurring Meeting - Yolanda	0h30m	07/19/2010 08:00am	V = 0	×ZQ



• 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.

WO SALES	Home Accounts Opport	unities Inventory Research	Analytics Activities	Other		Recent Q Find
Jsers: Home						💥 Actions 🔻
orteute	Users: Yolanda Thomas (wo	oythomas)				
Create New User	Show more details Edit	Traffic Install WO Client Entru	ustments Duplicate		Reset to Default: User Preferences Homepage Das	hboard Sales Preferences
Users						
Import	Full Name:	Yolanda Thomas	\mathbf{i}		User Name: woythomas	
	Status:	Active				
	User Settings		\sim			
	System Administrator:	Grants system a	administrator privileges to this			
	Domain Authentication:	Use domain aut	thentication To install W	O Client downloa	ad and run one of the programs below:	
	Reminders:	Set a default for	reminders for Cime WO Clin	ant setun Versio	a: 2.0.10 with Outlook plug in 2.0.10 Build F	Jata: Captambar 20th 2
	Show Full Name:	Display a user's	full name nst	version	1. 2.0.10 with Outlook plug-in 2.0.10 build b	Jate. September 20th, 20
	User Information			ent setup Versio	n: 2.0.10 Build Date: September 20th, 2010	
Opening wo	osetup.exe			×		
You have	chosen to open					
whi	ch is at Discourtille					
white	crisa: Binary File					
fror	n: http://wo-salesap	i-03.wideorbit.com				
Would yo	ou like to save this file	e?				
		Sa	ave File Can	cel		

• 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



WIDE

WO Sales Setup v.2.0.9 with Outlook plug-in v.2.0.9
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 Callsers/wthomas/AppData@coming/WO Sales Browse
Space required: 46.8MB Space available: 110.7GB Driving the Business of Advertising
<back next=""> Cancel</back>



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 <u>WO Sales</u> 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 prepopulate.

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

riving the Business of Advertising
WO Sales Setup v.2.0.9 with Outlook plug-in v.2.0.9
Configure WO Sales Outlook Sync plug-in Please provide your credentials to configure WO Sales Outlook Sync plug-in Please enter your credentials if you wish to configure WO Sales Outlook Sync plug-in. Variance did in the attempt and professe it blacks

Choose a Start Menu folder for the V	VO Sales shortcuts.	Ŵ
Coloct the Start Menu folder in which	you would like to create the program's chartcute. V	
can also enter a name to create a ne	w folder.	u
WO Salaa		_
WO Sales		
Accessories		
Administrative Tools		
AIM Ciaco Sustema VDN Client		
DW WI AN		
Games		=
Maintenance		
McAfee Security Scan Plus		
McAfee Security Scan Plus Microsoft Office		
McAfee Security Scan Plus Microsoft Office Microsoft Office Live Meeting 2007		
McAfee Security Scan Plus Microsoft Office Microsoft Office Live Meeting 2007 Mozilla Firefox		

< Back Next > Cancel



WO Sales Setup v.2.0.9 with Outlook plug-in v.2.0.9

Configure WO Sales

V Install Desktop Client

V Create Quick Launch shortcut

✓ Install WO Sales Outlook Sync plug-in

Username: woythomas Password:

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Create Desktop shortcut Flash Player is required to run WO Sales.

🔽 Install Flash Player 10

Please configure WO Sales installation.

WO Sales URL is required to create shortcuts.

http://wo-salesap-03.wideorbit.com/index.php



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😵 WO Sales Setup v.2.0.9 with Outlook plug-in v.2.0.9
Installation Complete Setup was completed successfully.
Completed
Create shortcut: C: Users\ythomas\Desktop\WO Sales.Ink Create shortcut: C: Users\ythomas\AppData\Roaming\Wicrosoft\Internet Explorer\Q Output folder: C: Users\ythomas\AppData\Roaming\WiCrosoft\Windows\Start Menu\ Output folder: C: Users\ythomas\AppData\Roaming\Wicrosoft\Windows\Start Men Output folder: C: Users\ythomas\AppData\Roaming\Wicrosoft\Windows\Start Men Output folder: C: Users\ythomas\AppData\Roaming\Wicrosoft\Windows\Start Men Output folder: C: Users\ythomas\AppData\Roaming\Wicrosoft\Windows\Start Men Output folder: C: Users\ythomas\AppData\Roaming\Wicrosoft\Windows\Start Men Create shortcut: C: Users\ythomas\AppData\Roaming\Wicrosoft\Windows\Start Men Create uninstaller: C: Users\ythomas\AppData\Roaming\Wicrosoft\Windows\Start Men Created uninstaller: C: Users\ythomas\AppData\Roaming\Wicrosoft\Windows\Start Men Created uninstaller: C: Users\ythomas\AppData\Roaming\Wicrosoft\Windows\Start Men Created uninstaller: C: Users\ythomas\AppData\Roaming\Wicrosoft\Windows\Start Men
Driving the Business of Advertising < Back Next > Cancel



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 <u>ONLY</u> 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



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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.

🕞 Inbox - Microsoft Outlook	-
É <u>F</u> ile <u>E</u> dit <u>V</u> iew <u>G</u> o <u>T</u> ools <u>A</u> ctions C <u>o</u> nferencing <u>H</u> elp	
🗄 🔂 New 👻 🔀 🔀 Reply 🙈 Reply to All 🙈 Forward 👫 📑 Send/Receive 👻	
🚦 🕄 Settings 🛛 🚔 Archive Mail Item 🗍 New 🕶 🖉 Sync with WO Sales 🕶 🖕	

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.

W	/ideOrbit Ou	itlook Plug-In - S	ettings					×
	Login	onflict Resolving	Calendar	Contacts	Tasks	Advanced	About	
	User name:	admin						
	Password:	*****						
	Service URL	: http://http://wo-b	oldsvr2-07:81	/trainin W	ideOrb	it Outlook	Plug-in	х
				Test	Test o	onnection	succeede	d.
						<u>O</u> K		
	0							
Ŷ	VIDEORBI	т				Ok	Cancel	

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*.

WIDE

- 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:

- o 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*.



WideOrbit Outlook Plug-In - Settings	x
Login Conflict Resolving Calendar Contacts	Tasks Advanced About
Sync folder: Mailbox - Yolanda Thomas\Calendar	
Meetings last sync time: Was not synchronized yet	
Calls last sync time: Was not synchronized yet	
Allow private events synchronization	
Send attachments	
Vise time limitation during calendar items synchronizati	on
Load calendar items for last days: 30	
Keep in sync	
Sync at outlook startup	
Sync every: 30 minutes	
WIDERPRIT	Ok Cancel

CONFLICT RESOLUTION TAB

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

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- "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. (With Outlook Plug-In Option)



WideOrbit Outlook Plug-In - Settings	х
Login Conflict Resolving Calendar Contacts Tasks Ad	Ivanced About
Sync folder: Mailbox - Yolanda Thomas\Contacts	
Contacts last sync time: Was not synchronized yet	
Keep in sync	
Sync every: 30 minutes	
WIDE ORBIT O	k Cancel

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.

Login Conflict Resolution Calendar Contacts Tasks Advanced About ync folder: Mallbox - Yolanda Thomas Tasks asks last sync time: Wednesday, June 09, 2010 9:57:25 AM 2 Use time limit during tasks items synchronization cad tasks items for last 30 days Keep in sync Sync at Outlook startup Sync every 30 minutes	ideOrbit Ou	tlook Plu	ig-In - S€	ettings				X
ync folder: Mallbox - Yolanda Thomas Tasks •••• asks last sync time: Wednesday, June 09, 2010 9:57:25 AM 2 Use time limit during tasks items synchronization oad tasks items for last 30 days Keep in sync Sync at Outlook startup Sync every 30 minutes DECORBIT OK Cancel	Login Co	onflict Res	solution	Calendar	Contacts	Tasks	Advanced	About
OK Cancel	Sync folder: Tasks last sy ▼ Use time Load tasks i Keep in sy ■ Sync at ■ Sync ev	Mailbox ync time: \ limit durin tems for li nc Outlook s ery 30	- Yolanda Wednesd g tasks it ast 30 itartup minut	ay, June 09, ems synchro days es	2010 9:57:25 onization	AM		
	IDEGREI	т					Ok	Cancel

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.



ogin	Conflict Re	solution	Calendar	Contacts	Tasks	Advanced	About
/ Sho	w context me	nu (on rig	ht click)	🔲 L	og SOAP m	essages	
Disp	olay notificatio	on during b	ackground s	ync 📃 E	xtended De	bug Logging	
Archiv	/e			V S	earch In Se	veral Threads	
/ Auto	search by e	mail addre	esses	C	hange cate	gory colors	
Provo	sen/er						
Def	ault OCu	stom					
Addres	ss:				Port:	80	
Userr	name:						
Passv	vord:						
⊽ By	pass proxy s	erver for	local address	es			

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

WIDE

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

Search Contacts								
🛿 Full Name	Company	Job Title	No	tes				
Click here to add a new Co.								
Mom								
Preschool								
Therapist					<u>O</u> pen Items			
Arthur Curry		swim coach			<u>P</u> rint			
Hubby at Work				:	Send as <u>B</u> usiness Card	ł		
Frank Poncherello		Zumba instructor			Send <u>F</u> ull Contact	•		
Clark Kent	Lane Advertising				Follow Up	•		
Steve Austin	OSI	Buyer	Ha		Catananian	ĺ		
Maddie Hayes	Blue Moon	Buyer			Categor <u>i</u> ze		۲	Sync
Rose Nylund			Lo	×	<u>D</u> elete			Update to WO Sale
				2	Move to Folder		4	Include for Sync
					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.

<u>F</u> ile	<u>E</u> dit	<u>V</u> iew	<u>G</u> o	<u>T</u> ools	<u>A</u> ct	tions	C <u>o</u> nf	erencing	H
<u>8</u>	lew +	🏚 🕒	\times	66	-	1	1	Search a	ddre
8 s	ettings	🌀 Syr	nc	New 🕶	Sync	with \	NO Sa	les 🕶 🖕	
»	8= 1	WO CR	м -	Conta		Sync	Calen	dar	
	00	D 0 Full Name				Sync	Conta	icts	
		Click here	to a	dd a nev	2	Sync	Tasks		
	8=	Mom			۲	Sync	All		

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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.

	-) -		Ur	ntitled - Contact	
Contact Inser	t Format Text	WO Sales Sync			
 Settings Exclude Sync O Sales Sync 	Item From Sync				
Full Name Company: Job title: File as:					

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.

Accounts				New 🔀 Actions 🔻
Current Accounts	Potential Accounts			
▼ Advanced Search	Q Filter		Found 337	3 - i) WTV-SC:Golden Ads:The C Manage views •
Station	Advertiser 🔟 Agend	y 🔟 Account Exect	utive 🔟 Sales Office 🔟	Sales region Approve
WTV-SC (1) 🔻	··· ·· ··	·	• •	v Search v Clear
Station	Advertiser 1	Agency	Account Executive	i) WTV-SC:Golden Ads:The Cheesecake Store:TV-SC Dallas:Christine C
WTV-SC	Target, Inc.	Haworth Group, The	Andrea VanWagner	Info A&P Opportunities Orders Contacts worke Activities
WTV-SC	Target, Inc.	McCann Erickson/LA	House Account	New Select Pelete
□	Tea Shoppe	Big Ads	Christine Collins	New Select
WTV-SC	Test CRM Account	Big Ads	House Account	Role Name 1 A Email Phone Stations
WTV-SC	The Cheesecake Store	Golden Ads	Christine Collins	Buying Rose Nylund rnylund@em WTV-SC
WTV-SC	Therasense	WFofR	WideOrbit Demo	Buying Sophia Petrillo spetrillo@em WTV-SC



Creating Calendar Events

Í		19 (* 4	⇒) ∓		_		Unt
		ppointment	Insert	Form	at Text	WO Sales Sync	
	Setting Sync	gs 🔲 Exclu	de Item From	n Sync	Type: Status:	Meeting Meeting	Select Clear
	WO Sales S	intment occurs	Marking in the past.			Options	Relations
	Subject: Location:						
	Start time: End time:	Thu 6/10/2010 Thu 6/10/2010)	•	8:00 AM 8:30 AM	▼ All c	lay event

- 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

Send thank you note 9 Task Insert WO Sales Sync Format Text 8 Settings Exclude Item From Sync Select 💰 Sync Clear Marking Relations WO Sales Sync Due in 10 days. Subject: Send thank you note Fri 12/3/2010 Start date: Status: Not Star -Due date: Fri 12/3/2010 • Normal Priority: Reminder: Fri 12/3/2010 -8:00 AM Thank you for lunch meeting and signed Order.

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). 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

Tea Shoppe					
Accounts Advertisers	Agencies Contacts	Employees	 Opportunitie Sales Office 	es 🔲 Stations e 🔲 Task	
My Items only				Search	Clear
Select Items			51		
earch Result:					
Accounts			Parent: Set	Big Ads/Tea Shoppe/	WTV-SC ×
Big Ads/T	ea Shoppe/WT	V-SC	Selected Item	S:	
	4				

(With Outlook Plug-In Option)

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Creating Archived Emails

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

C. 20						
Message	Insert	Options	Format Text	WO Sales Sync		
Settings						
🖻 Send and Archive						
WO Sales Sync						
Send Cc	. <u>idoe</u>	@email.com				
Account Subject	t: Avail	s				

- 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.

2 Search Selected Mail Items avails		
big avails		
3 Select items Contacts Image: Select items Select items Select items: Image: Select items Image: Select items: Image: Select items: Image: Select items:	28 AM	-1
4 Quick Create Contact Create		
Close when archiving finished	Archive Cancel	5

Version 2.0.1 (With Outlook Plug-in Option) Updated: 11/23/1



Mail Archiving window

- 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.
- 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.