

## WO Proposal Installation Guide

### Installing the Desktop Client

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#### Introduction

While *WO Sales* is a web-based application and accessible using any browser, we highly recommend that the desktop client be installed on users’ primary workstation for regular day-to-day use. The desktop client is essentially a dedicated browser used exclusively by *WO Sales*, which provides a number of benefits listed below. It requires a simple one-time installation and does not involve upgrades with new application releases. Rarely, there might be future need to upgrade. In that event, the upgrade will be handled by an auto-update process.

#### Desktop Client Benefits

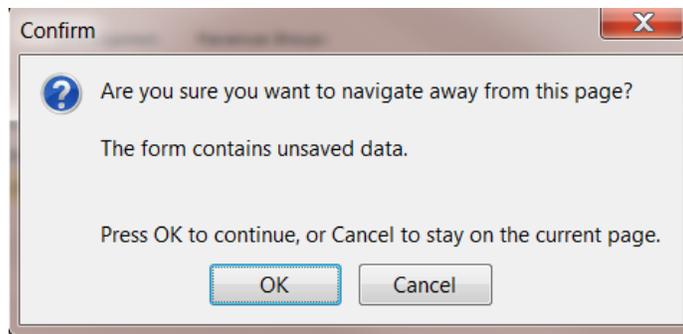
1. While most current versions of known browsers (such as Internet Explorer and Mozilla Firefox) are supported, some older versions are not. In addition, Google Chrome is not fully supported in any version. Using the *WO Sales* desktop client ensures that you are always using a browser that is completely dedicated to and fully supported by *WO Sales*.

2. Browsers can include add-ons that might conflict with *WO Sales*. Using the *WO Sales* client with dedicated browser will eliminate unexpected behavior related to add-ons.
3. Browsers can include multiple toolbars in view, occupying screen space needed for the application. This can result in buttons not appearing or requiring users to toggle to full-screen mode to see options. *WO Sales* client has a single navigation/status bar and the application is assured to be fully visible when also using minimum supported screen resolution of 1280 x 800.



**Technical Note:** The minimum screen resolution supported by *WO Sales* is 1280 x 800 pixels. When installing *WO Sales*, please verify your display settings are correct.

4. When closing out of a standard browser while using any website, the *WO Sales* application will also fully close without warning and unsaved work can be lost. By isolating *WO Sales* to a dedicated browser this accidental, but common action can be entirely avoided. The *WO Sales* browser also provides a confirmation warning when closed if you have a new or edited unsaved item.



## Pre-Install Checklist

- Administrator rights to the workstation you're installing the application on
- Location of the user's WOTraffic.exe file
- Your *WO Sales* Service URL (provided by your Implementation Team)
- The user's WideOrbit username and password (only needed if there will be Outlook integration)

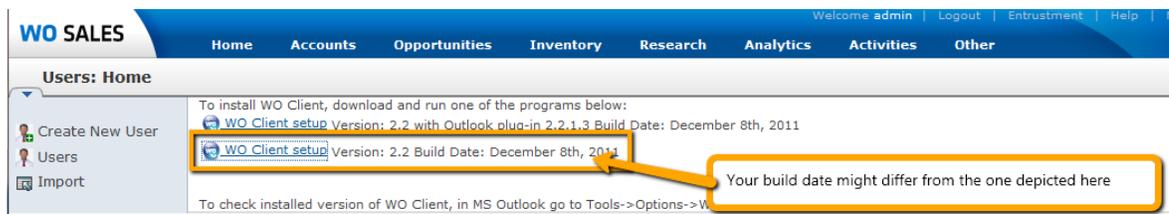
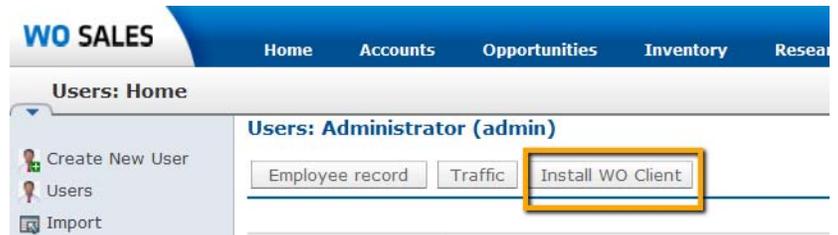
# Download Instructions

## 1. Download the Installer

- In a web browser, access *WO Sales Proposal* 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



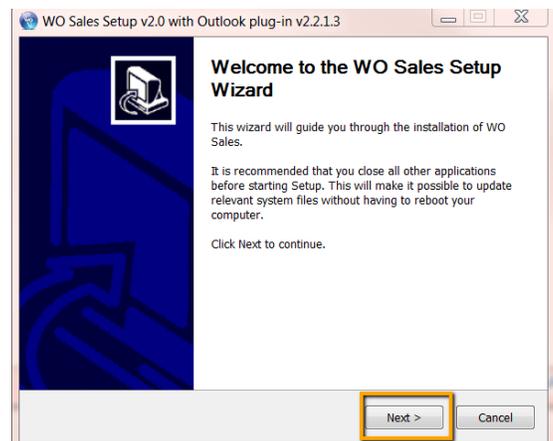
- Click **Install WO Client** and select the Installer executable



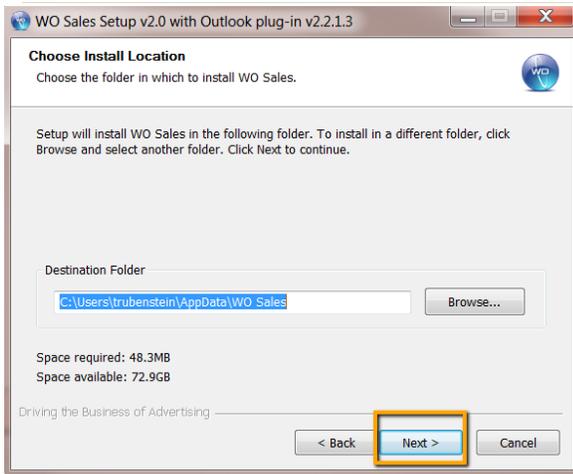
- When prompted, **Save** the executable to the user's desktop or download folder for easy access

## 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.
- When the Installation Wizard opens, click **Next**.



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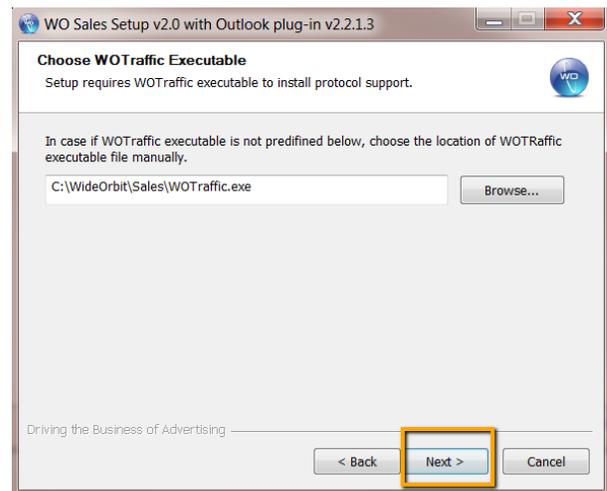


- Typically, the installation will occur to the default destination folder, unless you wish to specify otherwise. Click **Next**.



**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 [support@wideorbit.com](mailto:support@wideorbit.com) for help.

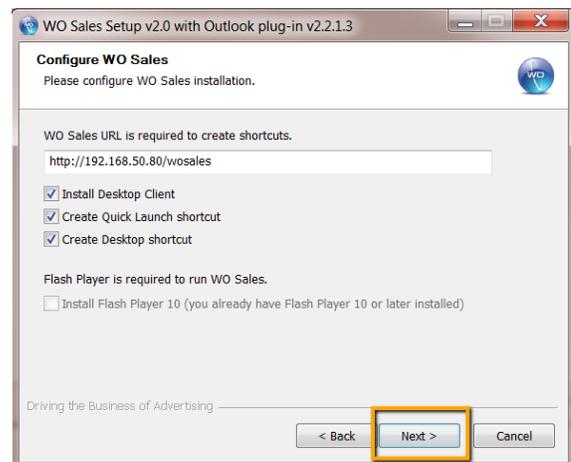
- When prompted, enter (or verify, if pre-populated) the location of the user’s WOTraffic.exe file. This step is required to continue installation. Click **Next**.



- When prompted, enter your *WO Sales* URL and ensure that all checkboxes below the URL are selected. Click **Next**.

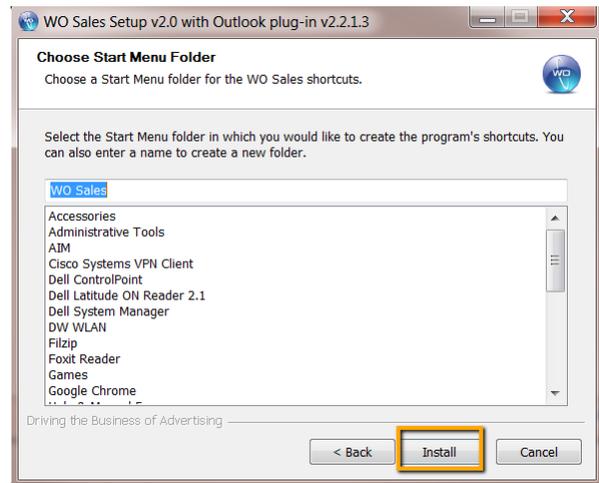


**Technical Note:** *WO Sales* requires Flash Player 10 or later for the Mozilla Firefox browser. If the Install Flash Player 10 checkbox is selected by default, the installer has not detected that the proper version is installed. Click **Next** to install the player as well.



### 3. 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**.



### 4. 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.

## Revision History

Name	Date	Reason	Version
Tiffany Rubenstein	04/24/2012	Correction to pre-install checklist	1.1
Tiffany Rubenstein	04/23/2012	Document created	1.0