



# 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**

 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.

<b>11</b>	11/1/11	1111111	17	
< > 🛆 C	http://wo-salesap-03.wideorbit.co	Desktop version of WO Sales has a		
WO SALES	Home Accounts O	pportunities Inventory Res	Welcome admin   Logout search Analytics Activities Othe	r Recent Find

**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

WO SA	ALES Home	Accounts	Opportunities	Inventory	W Research #	elcome admin   Lo malytics Acti	ogout   Entrustmer ivities Other	nt   Help   Hy Account   Rec	Admin   About ent <b>Q</b> Find	
Hom	e						Create Conta	ct Add Dashlets	🎉 Actions 👻	
				WO SA	LES	Home	Accounts	Opportunities	Inventory	Resea
•	Click <b>Install WO Client</b> and select the Installer executable	Create Vusers	New User	Users: A	administrato	Traffic Install W	0 Client			
	WO SALES	Home	Accounts	Opportunities	Inventory	Research	Welco Analytics	me admin   Logout   E Activities Other	intrustment   Help	M
	Users: Home	-								
	ि Create New User ♀ Users □ Import	To install WC WO Clier	Client, downlo nt setup Version nt setup Version talled version o	ad and run one of th 1: 2.2 with Outlook of 1: 2.2 Build Date: De f WO Client, in MS Of	e programs belov ug-in 2,2,1,3 Buil cember 8th, 2012 utlook go to Tools	d Date: December	<sup>r</sup> 8th, 2011 'our build date m	ight differ from the one	depicted here	

• 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**.

🔞 WO Sales Setup v2.0 with Outlook plug-in v2.2.1.3					
	Welcome to the WO Sales Setup Wizard				
	Sales. It is recommended that you close all other applications before starting Setup. This will make it possible to update relevant system files without having to reboot your computer.				
R	Cirk rea o comme.				
	Next > Cancel				

#### WO PROPOSAL INSTALLATION GUIDE: INSTALLING THE DESKTOP CLIENT v2.2

🔞 WO Sales Setup v2.0 with Outlook plug-in v2.2.1.3
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 C:\Users\trubenstein\AppData\WO Sales Browse
Space required: 48.3MB Space available: 72.9GB
Driving the Business of Advertising < Back Next > Cancel

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

• 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 for help.

WO Sales Setup v2.0 with Outlook plug-in v2.2.1.3								
Choose WOTraffic Executable Setup requires WOTraffic executable to install protocol support.								
In case if WOTraffic executable is not predifined below, choose the location of WOTRaffic executable file manually.								
C:\WideOrbit\Sales\WOTraffic.exe Browse								
Driving the Business of Advertising								
< Back Next > Cancel								

 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.

WO Sales Setup v2.0 with Outlook plug-in v2.2.1.3	X
Configure WO Sales Please configure WO Sales Installation.	wo
WO Sales URL is required to create shortcuts.	
http://192.168.50.80/wosales	
<ul> <li>✓ Install Desktop Client</li> <li>✓ Create Quick Launch shortcut</li> <li>✓ Create Desktop shortcut</li> </ul>	
Flash Player is required to run WO Sales. Install Flash Player 10 (you already have Flash Player 10 or later installed)	
Driving the Business of Advertising	Cancel

#### 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**.

WO Sales Setup v2.0 with Outlook plug-in v2.2.1.3	
Choose Start Menu Folder Choose a Start Menu folder for the WO Sales shortcuts.	w
Select the Start Menu folder in which you would like to create the program can also enter a name to create a new folder.	s shortcuts. You
WO Sales Accessories	<b>^</b>
Administrative Tools AIM	
Cisco Systems VPN Client Dell ControlPoint	Ξ
Dell Latitude ON Reader 2.1	
Dell System Manager DW WLAN	
Filzip Foxit Reader	
Games	
Google Chrome	<b>T</b>
Driving the Business of Advertising —	Cancel

#### 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