



# SalesOutlook<sup>®</sup> Client Setup for Outlook Users

Revised: August 24, 2021

SalesOutlook, Inc. 9710 Summer Oaks Drive Roswell, GA 30076 (770) 642-4923



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## **Purpose of this Document**

The purpose of this document is to setup a SalesOutlook client after the administrator has already installed the SalesOutlook database in multi-user environments. If your SalesOutlook database has not been setup then please reference the SalesOutlook Administration Guide (SO – Administration Guide) before installing. Single user and demo software installations can also use this guide to install SalesOutlook.

## **Preparing To Install**

Please ensure that all system requirements are met, including Windows system-level updates, and that the most recent service packs and updates for Windows and Office applications are applied before installing any SalesOutlook program. Users will need rights to update the registry when installing client.

### **IMPORTANT NOTES:**

- This document covers only the steps used to install and configure Outlook for use with SalesOutlook.
- If you are the system administrator and need to configure a shared SalesOutlook database on your Exchange Server Public Folders, please refer to the SO – Administrator Guide for instructions.

The Basic Installation Steps for cache mode outlined in this manual are as follows:

- 1. Setup cache mode for public folders.
- 2. Add the SalesOutlook database to the Favorites folder.
- 3. Configure Windows desktop search.
- 4. Install SalesOutlook client.



# SalesOutlook Client Installation

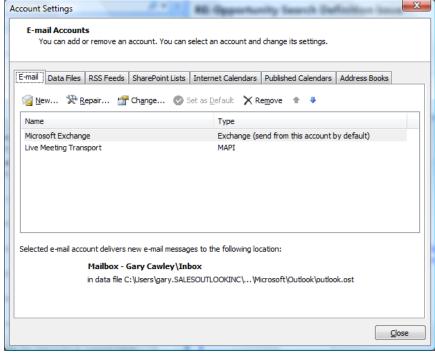
The following procedures will be performed for each client user. SalesOutlook recommends the Outlook Cached Exchange Mode for each client.

**BEST PRACTICE:** Multi-user environments should first have the Administrator set up and configure security permissions for the shared SalesOutlook database in the Public Folders on your Microsoft Exchange Server (See SalesOutlook Installation and Administrator Guide).

### Recommended - Adding cache mode to public folder favorites

While this feature is not required for LAN users but is strongly recommended because of the junk mail filter and performance increases with a slower Exchange server or network. It also allows a user to continue to work if the Exchange server is down, and when the server is up the new Cached Exchange Mode reduces network "chatter" and improve the performance of your network. Cached Exchange Mode is a hybrid between working connected and working with a local, offline database. The Cached Exchange Mode employs both simultaneously to optimize the performance for the user and to minimize network traffic and load on the Exchange Server. Note: Non-Cached Mode LAN users can skip to the topic Installing SaleOutlook Software on page 9.

- 1. Click on File from the Outlook Ribbon.
- 2. Click on Info | Account Settings | Account Settings.



- 3. Highlight Microsoft Exchange and click on Change.
- 4. Click on the More Settings button.



#### SalesOutlook Client Setup for Outlook

Server Settings  Let the Microsoft Exchange Server settings for your account.  Server Settings  Server: fb5-448e-4e68-af92-b74d56e5b5f9@salesoutlook.com User Name: garyc@salesoutlook.com  Coffine Settings  Ver Mail to keep offline:  Mail to keep offline:  Check this box and then click the More Settings button for additional configuration options. Outlook 2016 + users need to set. The slider to all  More Settings.	Change Account		×
Server: :fb5-448e-4e68-af92-b74d56e5b5f9@salesoutlook.com   User Name: garyc@salesoutlook.com    Offline Settings  Use Cached Exchange Mode  Mail to keep offline:  Mail to keep offline:  Check this box and then click the More Settings button for additional configuration options. Outlook 2016 + users need to set. The slider to all		er settings for your account.	×.
User Name: garyc@salesoutlook.com Check Name Offline Settings Use Cached Exchange Mode Mail to keep offline: Check this box and then click the More Settings button for additional configuration options. Outlook 2016 + users need to set. The slider to all	Server Settings		
Offline Settings          Image: Contract of the setting of the setting of the set of th	Server:	fb5-448e-4e68-af92-b74d56e5b5f9@salesoutlook.com	
Use Cached Exchange Mode Mail to keep offline: Check this box and then click the More Settings button for additional configuration options. Outlook 2016 + users need to set. The slider to all	User Name:	garyc@salesoutlook.com	Check Name
Mail to keep offline: Check this box and then click the More Settings button for additional configuration options. Outlook 2016 + users need to set. The slider to all	Offline Settings		
Check this box and then click the More Settings button for additional configuration options. Outlook 2016 + users need to set. The slider to all	Use Cached Exchange Mode		
click the More Settings button for additional configuration options. Outlook 2016 + users need to set. The slider to all	Mail to keep offline:	a de la companya de l	All
	click the More button for add configuration Outlook 2016	Settings itional options. + users need	More Settings

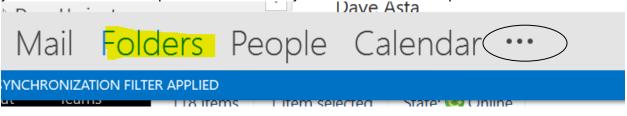


General Advanced Security Connection	
Mailboxes Open these additional mailboxes: Add Remove	
Cached Exchange Mode Settings	Make sure Use Cached         Exchange Mode and         Download Public folder         favorites are checked. Click         Share Folders if you share         calendars.
Mailbox Mode Outlook is running in Unicode mode against Microsoft Exchange. Outlook Data <u>File Settings</u>	Make sure database is set to Unicode. If not, then delete the *.ost database and *.oab offline address book files. Outlook will

5. Click on the Advanced tab and make sure Download Public Folder Favorites is checked.

#### Define the SalesOutlook folders as public folder favorites

 Display the Folder List by pressing the Ctrl-6 if the folder list is not already visible. Note that clicking the Mail group button displays a filtered list of folders. The only way to view the entire folder tree is to click the Folder List button at the bottom left-hand corner of your Outlook window or press Ctrl-6. You may have to click on the elipses

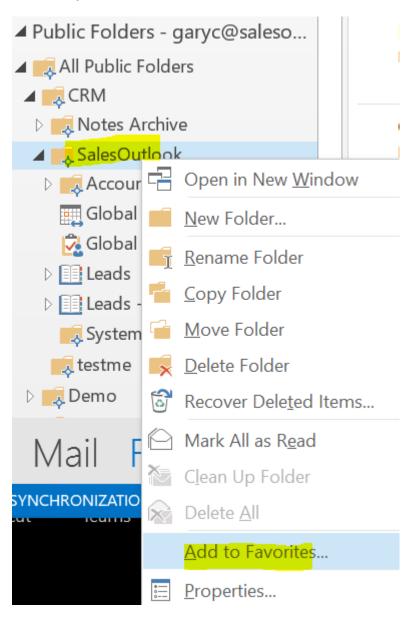


2. Navigate to the SalesOutlook folder in the Public Folders structure and highlight the SalesOutlook folder.



<u>TIP</u>: Please contact your Exchange administrator to find out where the SalesOutlook folder structure was installed. Normally, SalesOutlook is installed under Public Folders / All Public Folders /SalesOutlook.

3. Right click on the SalesOutlook folder and choose Add to Favorites.





#### 4. Click on the <u>Options>>></u> button and select the following options:

- a. Add <u>subfolders</u> of this folder
  - i. Add all s<u>u</u>bfolders
- b. Automatically add <u>new subfolders</u>
   i. Add all subfolders.
- c. Click <u>A</u>dd.

Add to Favorites	
Public folder name :	Add
SalesOutlook	Add All
Eavorite folder name :	Cancel
SalesOutlook	Help
Subfolders ✓ Add subfolders of this folder ← Add immediate subfolders only ← Add all subfolders ✓ Automatically add new subfolders ← Add immediate subfolders only ← Add all subfolders	<u>Options&gt;&gt;</u>
Location     Add as top-level favorite     Add as a subfolder of the following f     Existing Parent Folder	iolder:

Note: Make sure the Database is replicated before continuing.

Check the SalesOutlook folder, the drop downs folder and the system folder to make sure they have items and are not replicating before installing the software. Do not continue to the next step until Outlook displays "All folders are up to date" in the lower right-hand corner of the Outlook status bar.

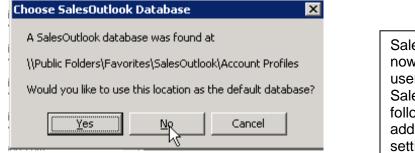
Set Outlook to work offline before installing the SalesOutlook client.

#### Install the SalesOutlook Client Software

- 1. With Outlook closed, run the Setup.msi file provided by SalesOutlook.
- 2. When Outlook is opened choose Next and finish through the splash screens. Cached users choose Work Offline .



3. When the message pops up to select the database choose Yes.



SalesOutlook setup is now complete and the user can work with SalesOutlook. The following text are additional recommended settings.

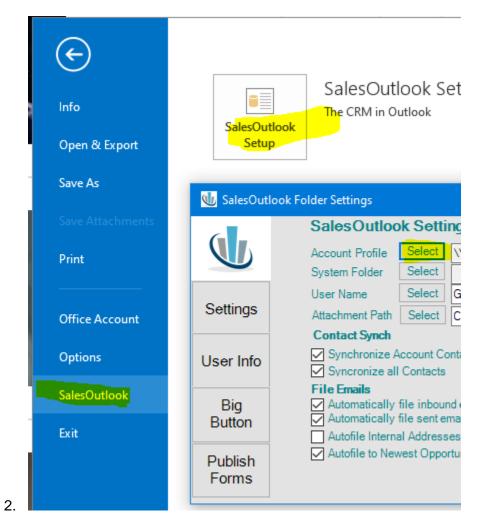
Setup is now complete. Restart Outlook. If you have problems or if you installed the software before installing the database then follow the manually setting up the database below.



# Manually installing the SalesOutlook Client software and setting the database - Troubleshooting.

If the Automatic configuration of the database did not work or if you have problems you can manually select the SalesOutlook database

1. Select File | SalesOutlook | SalesOutlook Setup from the Outlook menu bar and Select the SalesOutlook Folder Settings screen.





#### SalesOutlook Client Setup for Outlook

Offi	ce Account		
Opt	ions	Select Folder	×
SalesOut	look Folder Settings	Folders:	
	SalesOutlook Se	🚬 🗦 🕏 Tasks	OK Cancel
	Account Profile System Folder Sele	Public Folders - garyc@salesoutlook.	New
ttings	User Name Sele Attachment Path Sele	🗸 🗸 Favorites	
er Info	Contact Synch Synchronize Account Syncronize all Conta		
Big utton	File Emails ✓ Automatically file inl ✓ Automatically file se Autofile Internal Add	en <	

Click on the Select button to the ledt of the Account Profiles field.

3. Navigate to Public Folders\Favorites\SalesOutlook\Account Profiles. Click OK.

<u>TIP</u>: To navigate down to this folder you'll need to click on the plus sign to expand these folders. Repeat this for all folders that you want your users to see on the shortcut bar.

4. Click on the Select Button next to User Name.

older Settings	Search:   Name only	More columns Address Book	t - yaryc@saleso ~ Advanced Find
SalesOutlook Setting	Name	Title	Business Phone Loc
Account Profile Select	Gary		^
System Folder Select	📕 Gary Cawley		
User Name Select 0	💄 Gary Cawley		4044520812
Attachment Path Select C	🔮 info 😭 Keith Bilyeu		
Contact Synch	Kim Cawley		
Synchronize Account Cont	eads		
Syncronize all Contacts	rei license		
File Emails	🔁 Marisa Asta		
Automatically file inbound	2 MVFGlobal		



5. Navigate to your name and click to highlight. Copy your name to the right column by clicking the User button and then click OK.

Choose SalesOutlook User		×
Type Name or Select from List:	Show Names from the:	
kelly	Global Address List	*
Name	Business Phone	Office
Kelly Grimes		^
<ul> <li>MailHistory Mark Engelhardt</li> <li>MaXintegration - Art Brueton</li> <li>MaXintegration - Kerri Groves</li> <li>MaXintegration Technologie Meeting1 Meeting2 meeting3 Meeting4 Meeting5 Meeting6</li> </ul>	25	Canac Canac
Microsoft Motherboard Motherboard - Ivan Scott		Europ 💌
Ad <u>v</u> anced 🔻	ОК	Cancel



6. Select the path to store the saved emails to such as Onedrive, Drop Box, Google Drive etc.... Please consult your shared drive instructions for sharing a folder. A Note will be created and the original email with attachments will be stored in your shared foldera

处 SalesOutlo	ok Folder Settings – 🗆 🗙
G	SalesOutlook Settings
	Account Profile Select \\Public Folders - garyc@salesoutlook.com\Favorites\SalesOutlook\Account Profile
	System Folder Select Ga Select Folder
Settings	Attachment Path Select C: $\leftarrow \rightarrow \checkmark \uparrow$ SalesOutlook $\rightarrow$ SalesOutlook
	Contact Synch
User Info	<ul> <li>✓ Synchronize Account Contac</li> <li>✓ Organize ▼ New folder</li> <li>✓ Syncronize all Contacts</li> </ul>
	File Emails Documents A Name
Big Button	Automatically file inbound er Email attachmer
Dutton	Autofile Internal Addresses Fluid Preview Dc
Publish	Autofile to Newest Opportuni Microsoft Teams
Forms	Outlookissue
	Recordings
	SalesOutlook

- 7. Click Save. . SalesOutlook will map the database settings..
- 8. If using the alignment feature, type in the User Alignment. Your administrator should have setup each SalesOutlook user with an alignment number.

<u>Note</u>: User alignment is <u>only</u> used for organizations that have a hierarchal sales structure (Region, Division, and Territory). This field can be left blank if you do have this type of organizational hierarchy or if you have decided not to use Alignment number.

9. The SalesOutlook Client configuration for Outlook is now complete.

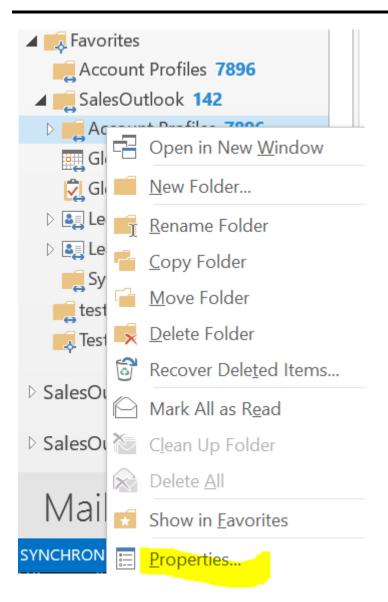
### *Optional* - Filtering Offline Data (offline / cached mode users)

NOTE: You will need the February 2011 Hotfix or service pack for this feature to work

1. To filter users, right click on the Public Folder Favorites and choose Properties.



#### SalesOutlook Client Setup for Outlook





2. Click on the Synchronization Tab.

Account Profiles	Properties	6		
General	Home	-	Administratio	
Forms       Permissions       Synchronization         Image: Synchronization       Use this tab to set the synchronization filter for this folder. When you want to synchronize this folder, choose Send/Receive from the Tools menu.         Filtered synchronization         Use this button to filter the offline copy of this folder.         Filter				
Statistics for this		11/4/200	3 6:22 PM	
Server folder co		7921 Iten		
Offline folder co	ontains:	4638 Iten	n(s)	
	ОК		Cancel Ap	ply

3. Click on the filter button.



4. Click on the Advanced tab.

Filter			? 🗙
Messages More Choices			
<add below="" criteria="" from="" td="" to<=""><td>this list&gt;</td><td></td><td></td></add>	this list>		
Define more criteria:	andition:	Val <u>u</u> e:	Remove
More Advanced,,,	Y	]	A <u>d</u> d to List
	ОК	Cancel	Clear <u>A</u> ll



5. Select Field | User Defined Fields in folder | and select Account Manager, Team or Alignment depending on how you want to filter your records.

NOTE: Account Manager or Team are the most common filters.

Fav <u>o</u> rites	Tools Actions Help	Account Hax
Cara d Danasi		Account LocationID
Send/Recei	ve Settings - SalesOutlook	Account Manager
Account	s	Account Name
	Include account in this send	Account Number
		Account Option
	Filter	Account Parent Account Status
Microso Exchange 9	(	
	Messages More Choices Advance	Account Web
	Find items that match these criteria	AccountAddress1
××	<add below="" criteria="" from="" list<="" td="" this="" to=""><td>AccountCity</td></add>	AccountCity
Remote		AccountCountry
		AccountID
		AccountNotes
		AccountPhone
	Define more criteria:	AccountState
		AccountType
	Condition	Accountzip
	Frequently-used fields	AE
	Address fields	Alignment
	Date/Time fields	Division Manager
	All Document fields	DivisionNumberTxt
	All Mail fields	Fiscal Year End
	All Post fields	FormType
	All Contact fields	Key Account
	All Appointment fields	Lead Source
1	All Task fields	Selected Item
	All Journal fields	Ship To
	All Note fields	Team
<	User-defined fields in folder 🔸	Top25
ad .	Account	



6. Enter the user's name if using the Account Manager field to filter the data or if using alignment number, select alignment number as the field and fill in the user's designated alignment number. Click on "Add to List". Click OK. Repeat for all folders that need filtering.

<u>NOTE</u>: SalesOutlook, Dropdowns, Products, System Folder and the Reports folders should not be filtered. Synchronization Filters should only be created or modified while working Connected to the Exchange Server.

Filter			X
Messages More Choice Find items that <u>m</u> atch <add belo<="" criteria="" from="" th=""><th>these criteria:</th><th></th><th></th></add>	these criteria:		
Define more criteria: — Field Account Manager	Condition:	Val <u>u</u> e: My Name	Remove
More Advanced		my Namel	Add to List
	ОК	Cancel	Clear <u>A</u> ll



#### System Requirements Please see the SO – System Requirements document for detailed minimum and recommended system requirements.

#### **Required Updates / Patches**

SalesOutlook requires the latest Microsoft patches and updates for Office.

<u>CONFIGURATION NOTICE</u>: The user must have local machine admin rights in order to perform the installation. The setup program will write information to the registry and create a SalesOutlook directory under Program Files and {username}\Application Data\SalesOutlook. The later directory needs to be read/write for the user after installation.

Users logged into a domain can be added to the Domain Admins group to perform the installation then removed after the installation.



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