

Setting Up ExisPto add in for outlook guide

1. General Remarks

ExisPto is an outlook plugin that directly connects to your Peoplesoft database using a generic ODBC connection that synchronizes Customer and Vendor contacts including conversations. ExisPto is a Read ONLY application, it will not update, delete or in any way modify your Peoplesoft database.

If you would like to add an additional feature not included in this product please contact Exis at info@exisone.com. We will make every effort to incorporate your needs into future releases of the product as well as one-offs.

This product will synchronize contacts at approximately 1000 contacts/minute depending on your connection speed and CPU oomph.

For general help on setting up ExisPto contact info@exisone.com

2. Pre-requisites

A. Please contact your DBA and have them create a user id/password to use with this product.

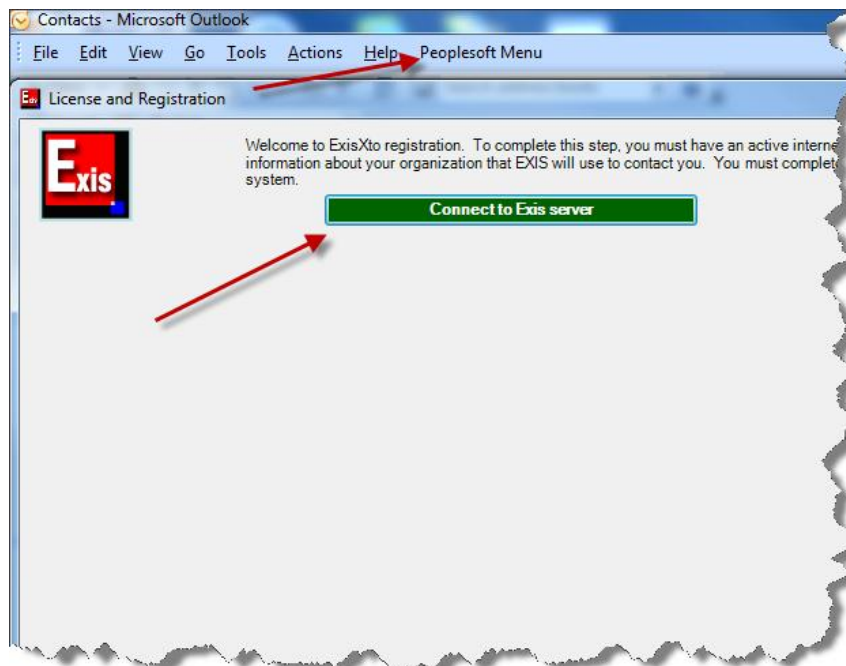
Please refer to the document contained in the installation folder called "For the DBAs"

B. Set up the DSN. Refer to the document in the installation folder called "Primer on setting up DSN"

C. You must purchase a valid activation key. This product is available for sale thru Amazon.

3. Activating Product

Locate the Peoplesoft menu in Outlook. From the menu select "Activate". Click on "Connect To Server". You MUST be connected to the internet to activate product.



Read the EULA agreement. Check the "I Agree" box. Type in your name for the electronic signature. Click ok.

The screenshot shows the 'License and Registration' window with the Exis logo. A green button 'Connect to Exis server' is at the top. Below it, the EULA text is displayed. Four numbered instructions in cloud shapes with red arrows point to specific elements: 1. 'Read EULA license agreement' points to the EULA text. 2. 'Check the "I agree" box' points to the checkbox labeled 'I agree. Here is my electronic signature:'. 3. 'Type in your electronic signature.' points to the text input field next to the checkbox. 4. 'Click ok.' points to the 'OK' button at the bottom right.

Exis LLC, Inc. - ExisPto

IMPORTANT-READ CAREFULLY: This End-User License Agreement ("EULA") is a legal agreement between you, the user, and Exis LLC, for the use of the ExisPto software and includes documentation. By installing, or using any edition of ExisPto, you agree to be bound by the terms and conditions of this EULA. If you do not agree to the terms of this EULA, do not install or use ExisPto; you may, however, return it to your vendor.

ExisPto is a registered trademark of Exis LLC, Inc. All other trademarks are the property of their respective owners. ExisPto is not sold in the United States and is not sold in other countries.

The EULA grants you the following rights:

- Installation. You may install and use one copy of the ExisPto.
- Reproduction and Distribution. You may NOT reproduce or distribute any part of the ExisPto to any person, or make any part of the ExisPto accessible to any party on the Internet.

2. DESCRIPTION OF OTHER RIGHTS AND LIMITATIONS.

- Limitations on Reverse Engineering, Decompilation, and Disassembly. You may not reverse engineer, decompile, or

☐ I agree. Here is my electronic signature: _____

OK

Enter your license key and all the information on this form. Click "Update Registration"

The screenshot shows the 'License and Registration' window with the Exis logo. A green button 'Connect to Exis server' and a blue button 'View License Agreement' are at the top. Below them is a registration form with various fields and a blue button 'Update Registration.' at the bottom. A red arrow points to the 'Product Key' field.

Product Key: _____

Company Name: _____

Country: Select a country

Address1: _____

Address2: _____

City: _____

State: Select a state

Postal Code: _____

First Name: _____

Last Name: _____

Phone 1: _____

Email: _____

Verify Email: _____

License activation key

The name of your organization.

Select your country.

Address line 1 of your organization.

Address line 2 of your organization.

City.

US state

Postal Code (zip).

Primary contact First Name

Primary contact Last Name

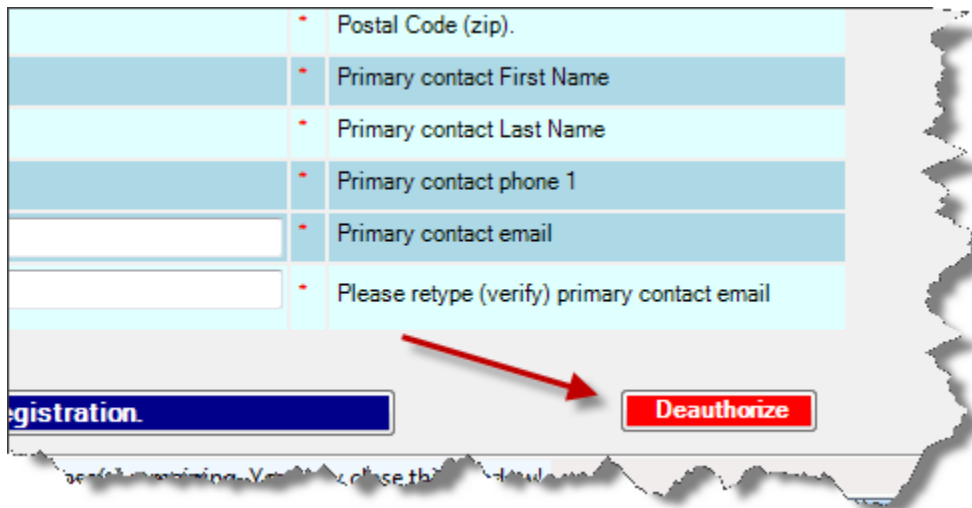
Primary contact phone 1

Primary contact email

Please retype (verify) primary contact email

Update Registration.

Note that the registration is transferrable. You can "De-authorize" this product to move it to another computer.



A registration form with a light blue header and a white body. The form contains several input fields for contact information, each preceded by a red asterisk. The fields are: Postal Code (zip), Primary contact First Name, Primary contact Last Name, Primary contact phone 1, Primary contact email, and Please retype (verify) primary contact email. Below the form is a blue button labeled "Registration." and a red button labeled "Deauthorize". A red arrow points from the "Deauthorize" button to the text "De-authorize" in the paragraph above.

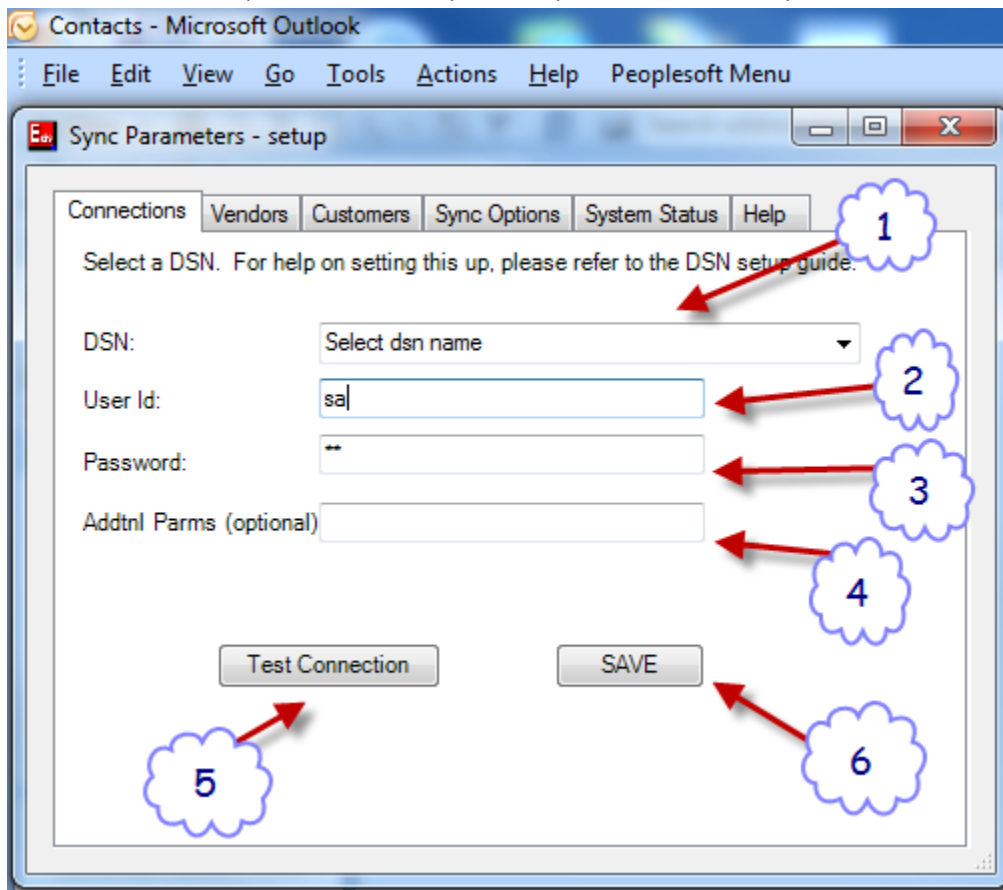
*	Postal Code (zip).
*	Primary contact First Name
*	Primary contact Last Name
*	Primary contact phone 1
*	Primary contact email
*	Please retype (verify) primary contact email

Registration. Deauthorize

4. Set up database connection

From the Peoplesoft Menu in Outlook select "Peoplesoft Settings"

1. From the DSN pull down menu select the correct DSN name for Peoplesoft connection
2. Enter User id and password and any other optional connection parameters.



A screenshot of the "Sync Parameters - setup" dialog box in Microsoft Outlook. The dialog has a menu bar with "File", "Edit", "View", "Go", "Tools", "Actions", "Help", and "Peoplesoft Menu". Below the menu bar are tabs: "Connections", "Vendors", "Customers", "Sync Options", "System Status", and "Help". The "Connections" tab is selected. The main area contains the text "Select a DSN. For help on setting this up, please refer to the DSN setup guide." followed by a "DSN:" label and a dropdown menu with "Select dsn name". Below this are "User Id:" and "Password:" labels with text input fields. The "User Id" field contains "sa". Below these is an "Addtnl Parm (optional)" label with a text input field. At the bottom are "Test Connection" and "SAVE" buttons. Red arrows and numbered cloud callouts (1-6) point to various elements: 1 points to the "Help" tab, 2 points to the "User Id" field, 3 points to the "Password" field, 4 points to the "Addtnl Parm (optional)" field, 5 points to the "Test Connection" button, and 6 points to the "SAVE" button.

Contacts - Microsoft Outlook

File Edit View Go Tools Actions Help Peoplesoft Menu

Sync Parameters - setup

Connections Vendors Customers Sync Options System Status Help

Select a DSN. For help on setting this up, please refer to the DSN setup guide.

DSN: Select dsn name

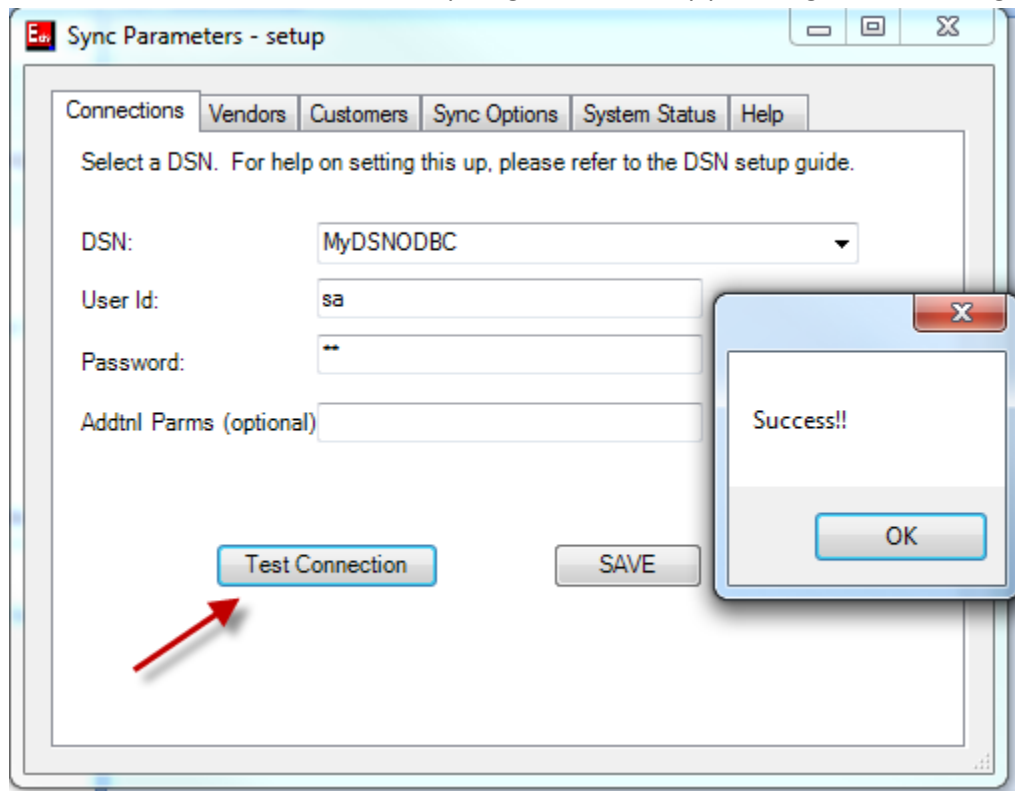
User Id: sa

Password: *

Addtnl Parm (optional)

Test Connection SAVE

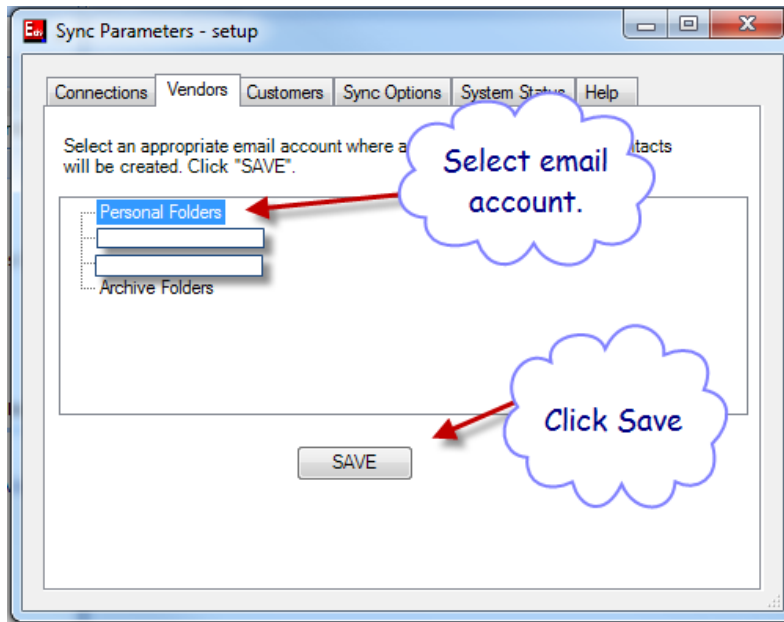
3. Click on "Test Connection". If everything went correctly you will get the following message:



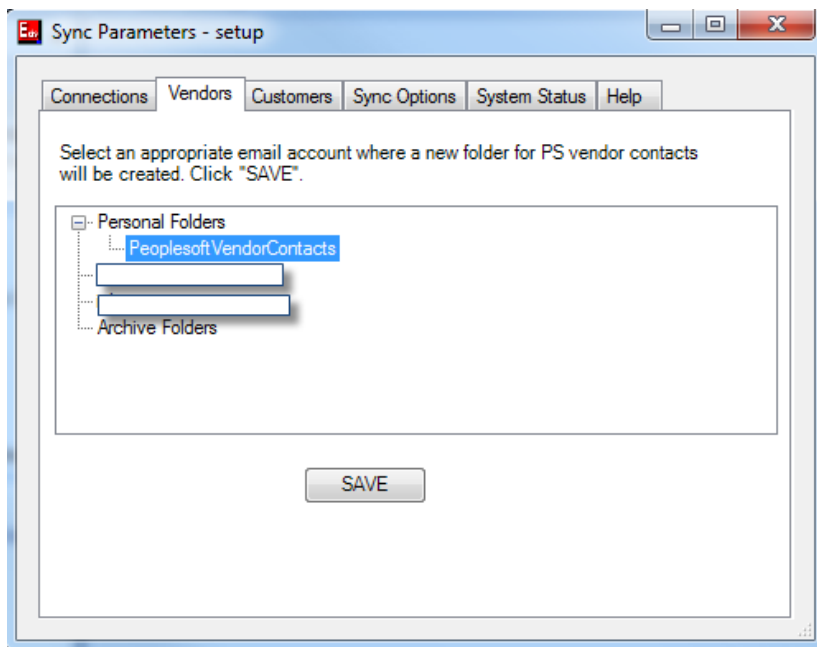
4. Click "SAVE".

5. Setting Up Vendor and Customer contact folders

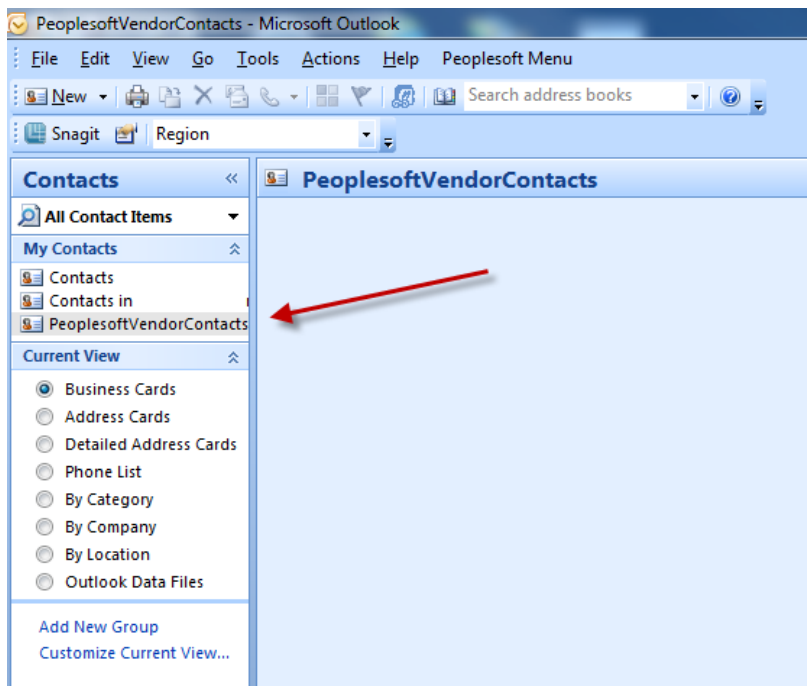
Select "Vendors" Tab. You must choose the email account that you will use to store Peoplesoft Vendor Contacts. You may have more than one email account set up in outlook. In this case you will see multiple entries in this screen. The first account will be automatically selected. But you may choose any other email account as you wish. All you have to do here is click save.



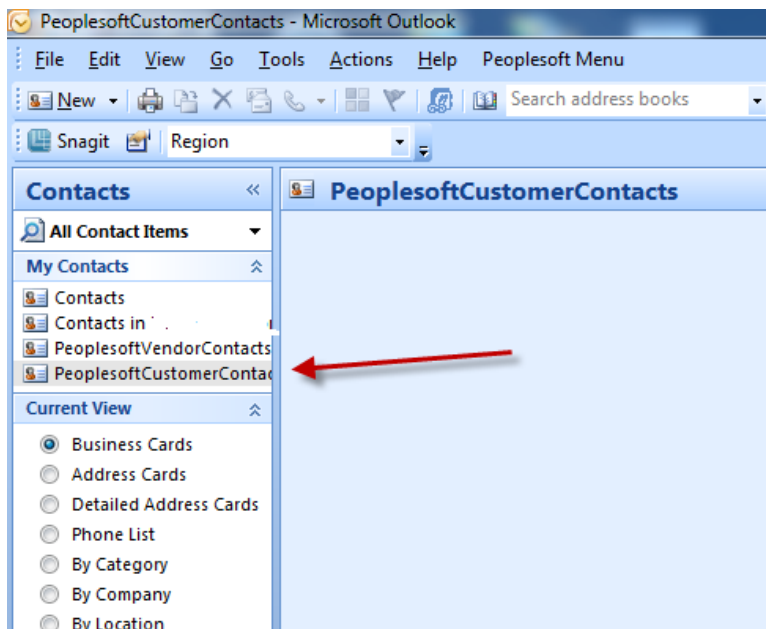
It should look like this:



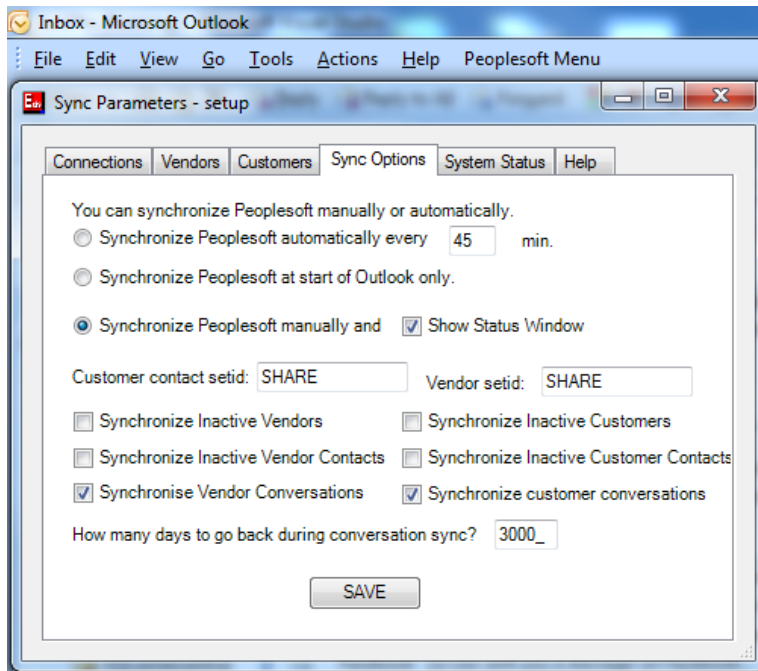
You can verify by navigating to your contacts tab in outlook, where you should see a new folder called "PeoplesoftVendorContacts" created.



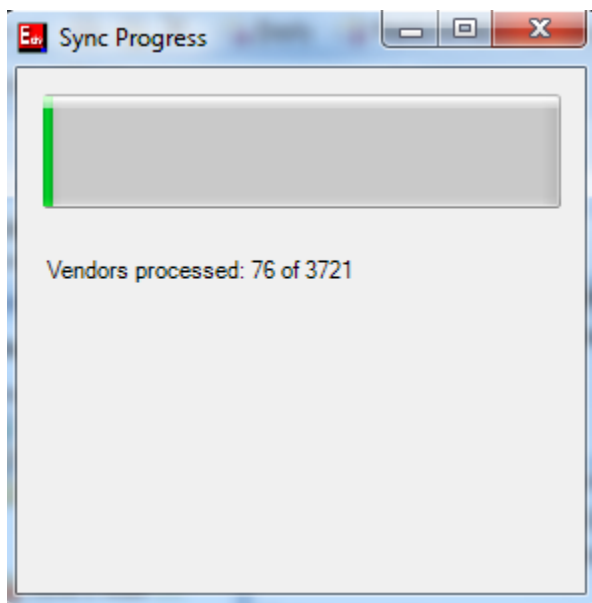
Repeat the same process for customer contacts. You should have two new folders after you are done:



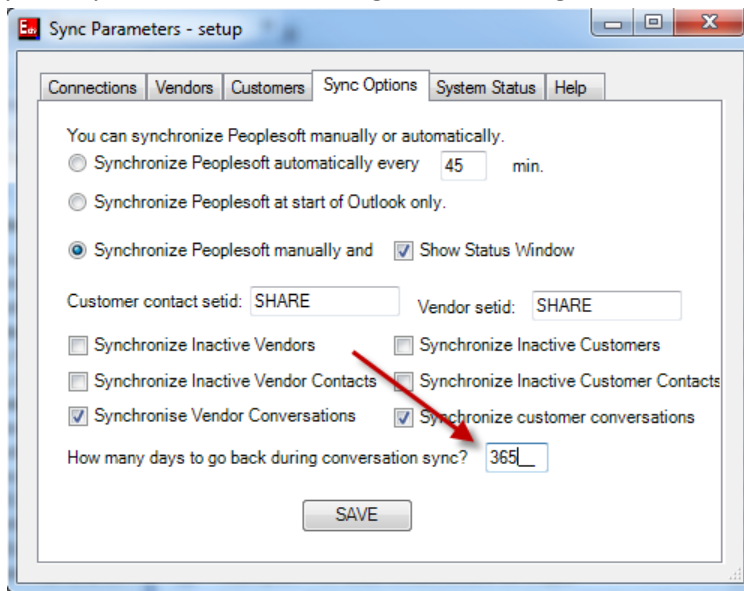
6. Sync Options



1. You can synchronize Peoplesoft contacts with outlook in 3 different ways.
 - a. Periodically based on a time interval which you specify in minutes.
 - b. At the start of outlook only
 - c. Manually. Manual option is available as the first selection in the Peoplesoft menu.
- In addition you can check the "Show Status Window" box, which will show you a progress bar such as this:

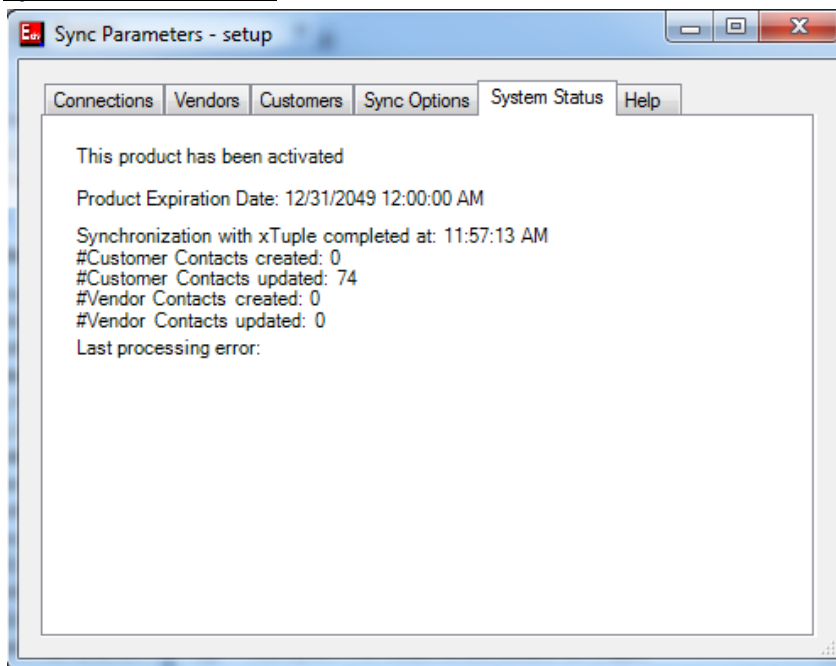


If you are going to use this to synchronize the conversations (they will appear in the body of the contact) you must select the number of days to go back to read the conversations. For example you may want to set this setting to 365 to bring in all the contact conversations for the last year:



This setting exists to speed up the loading of the contacts as well as so as not to clutter up the body of the contact screen.

7. System status window



There is a lot of useful information located here. You can find:

- Product Expiration date

- b. Last processing message
- c. Last processing error

8. **Help**

If you still need more help in setting up this product, please email Exis: info@exisone.com

