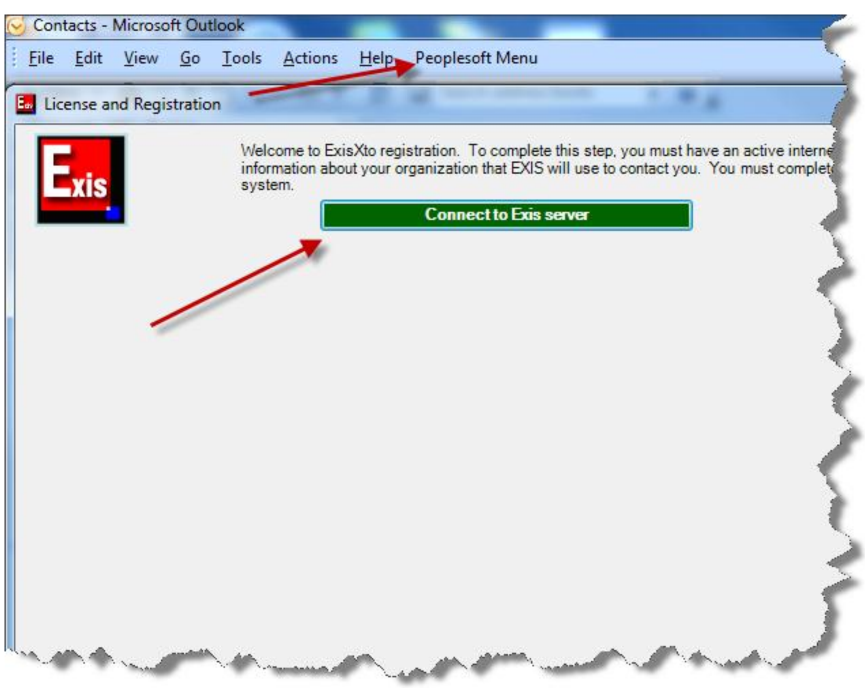
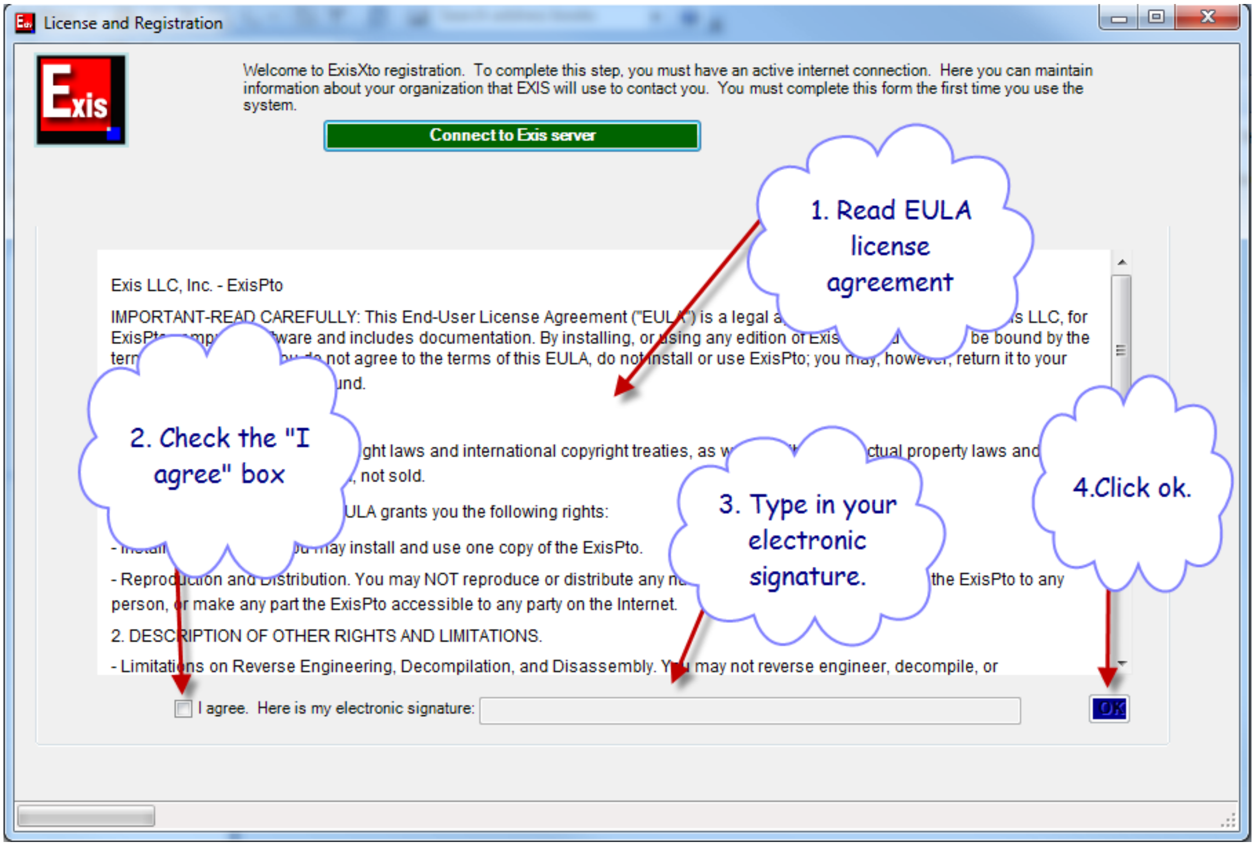
Setting Up ExisPto add in for outlook guide

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

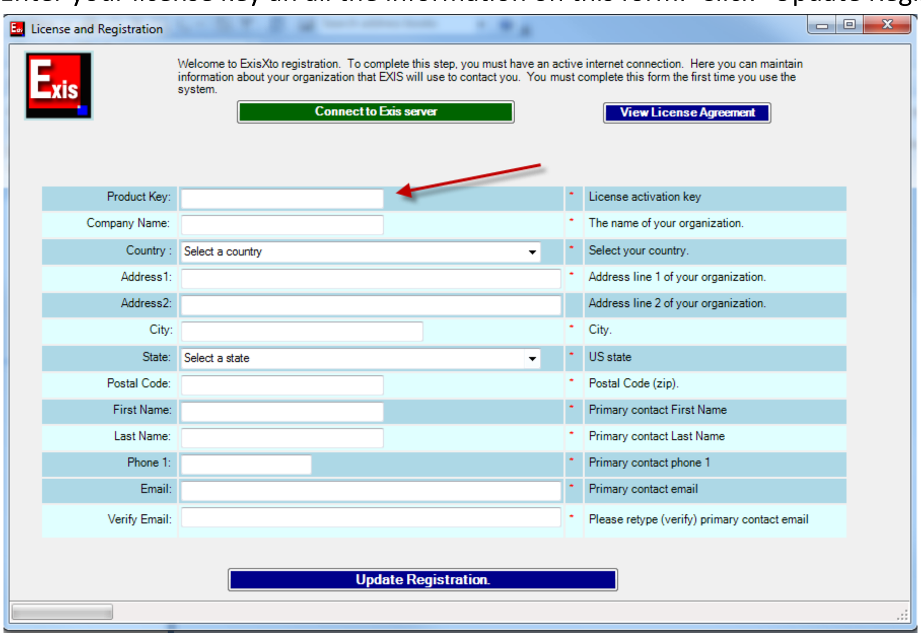
2. **Pre-requisites**
   A. Please contact your DBA and have them create a user id/password to use with this product. Please refer to the document contained in the installation folder called "For the DBAs"
   B. Set up the DSN. Refer to the document in the installation folder called "Primer on setting 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.



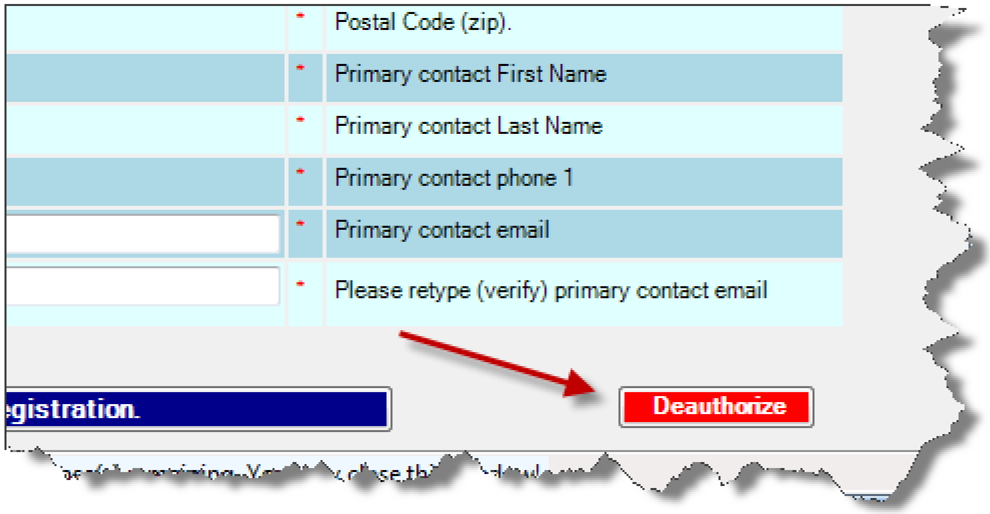
Read the EULA agreement. Check the "I Agree" box. Type in your name for the electronic signature. Click ok.



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



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

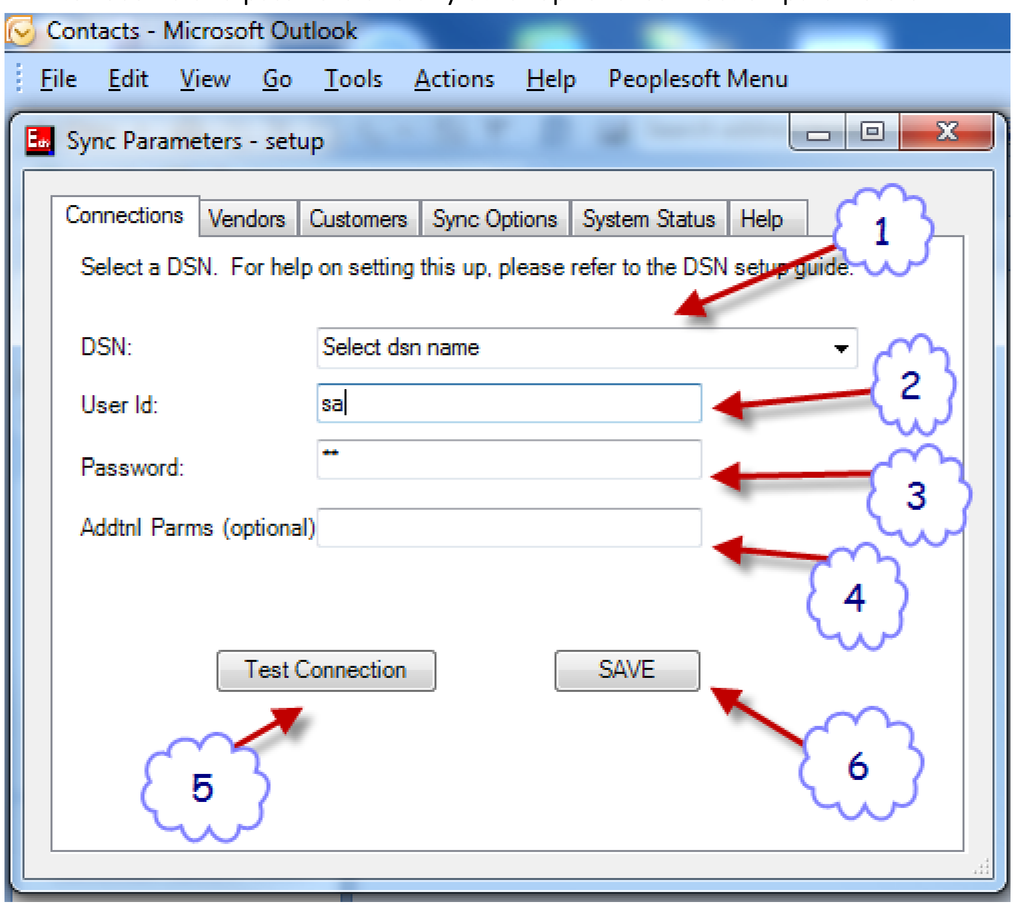


4. **Set up database connection**

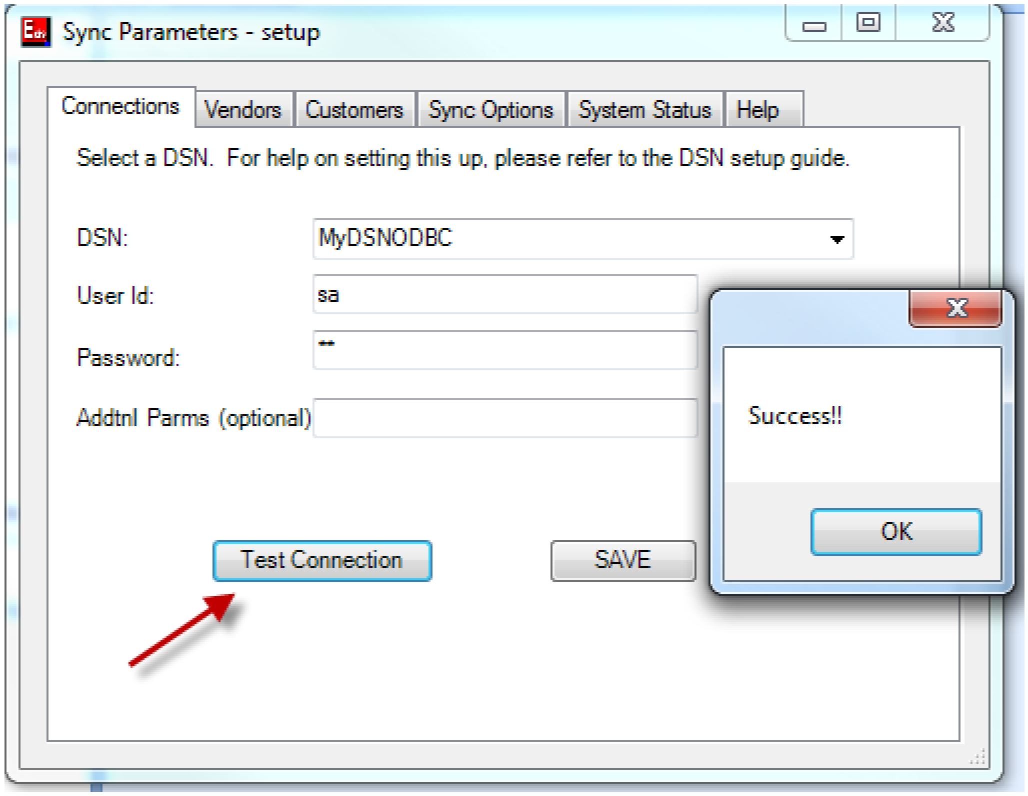
From the Peoplesoft Menu in Outlook select "Peoplesoft Settings"

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.



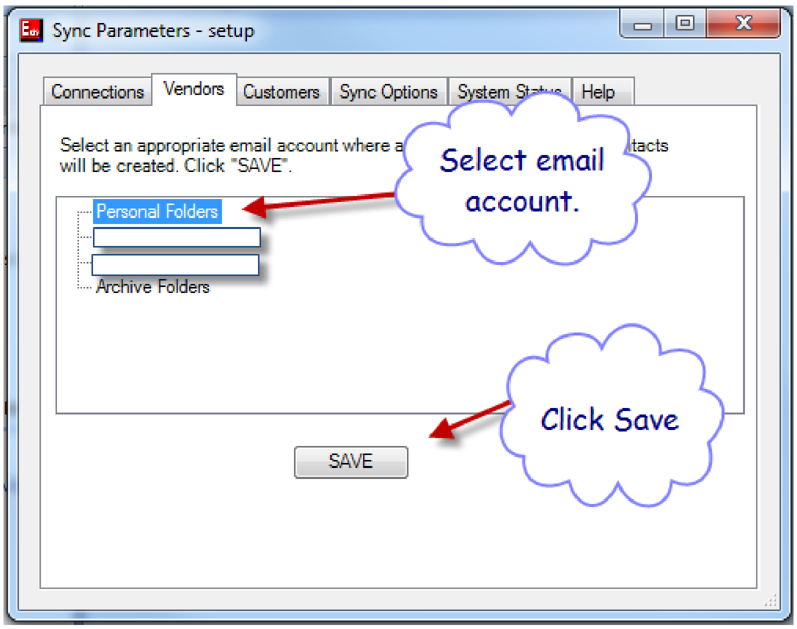
3. Click on "Test Connection". If everything went correctly you will get the following message:



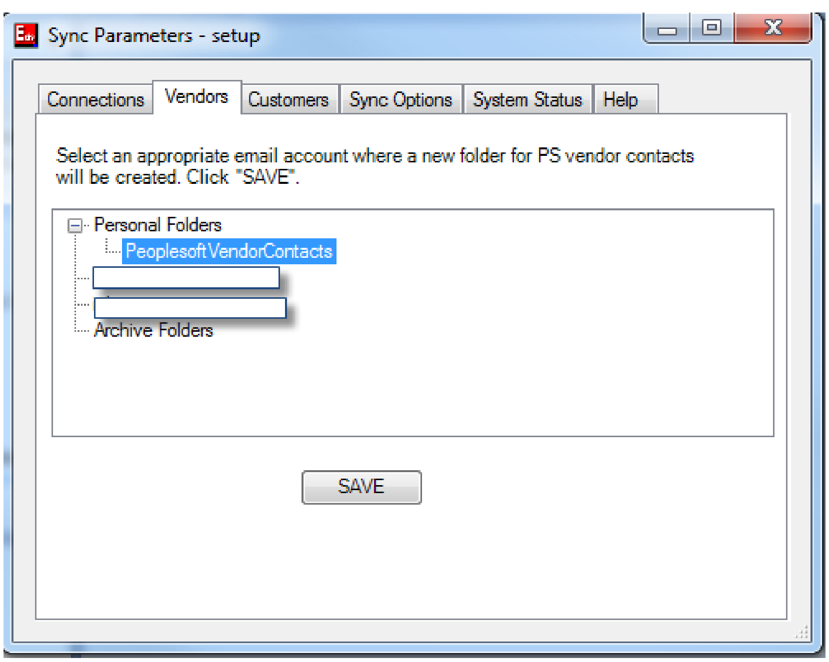
4. Click "SAVE".

5. **<u>Setting Up Vendor and Customer contact folders</u>**

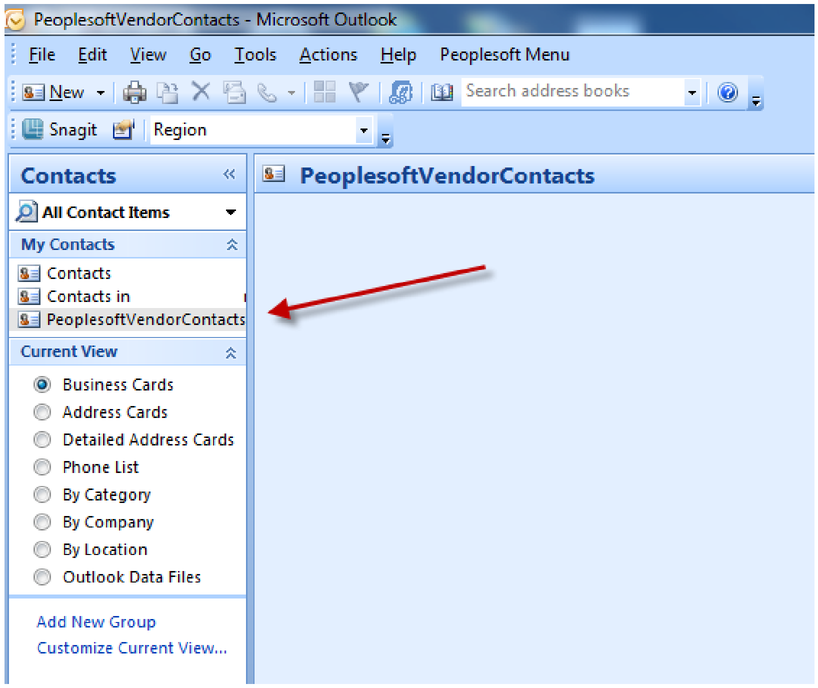
Select "Vendors" Tab. You must choose the email account that you will use to store Peoplesoft Vendor Contacts. You may have more than one email account set up in outlook. In this case you will see multiple entries in this screen. The first account will be automatically selected. But you may choose any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



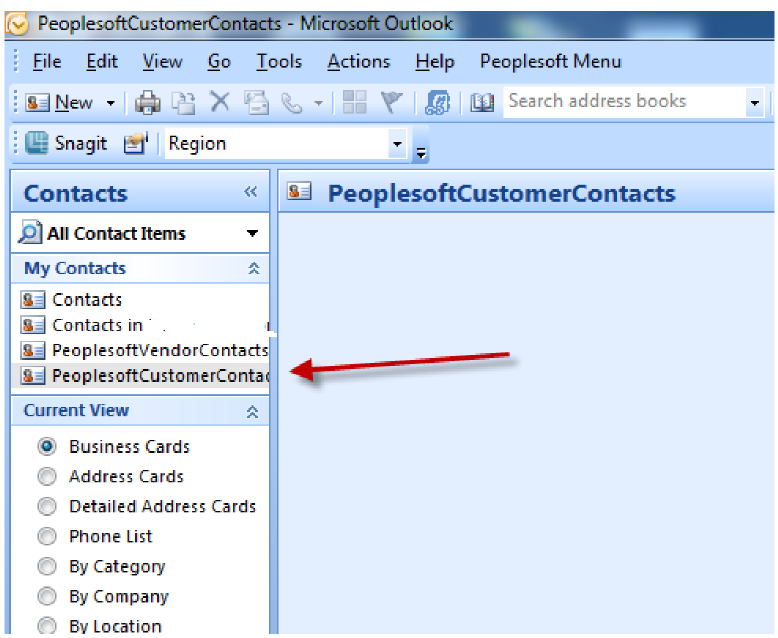
It should look like this:



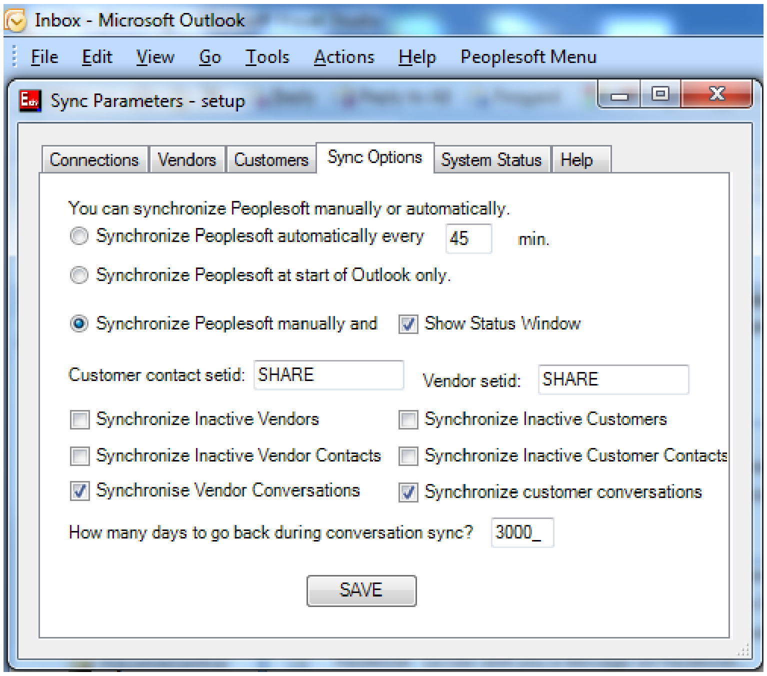
You can verify by navigating to your contacts tab in outlook, where you should see a new folder called "PeoplesoftVendorContacts" created.



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



6. **Sync Options**



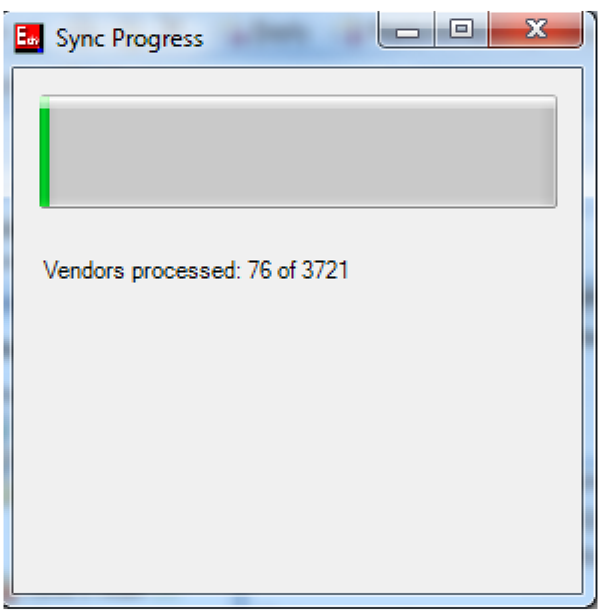
1. You can synchronize Peoplesoft contacts with outlook in 3 different ways.

   a. Periodically based on a time interval which you specify in minutes.

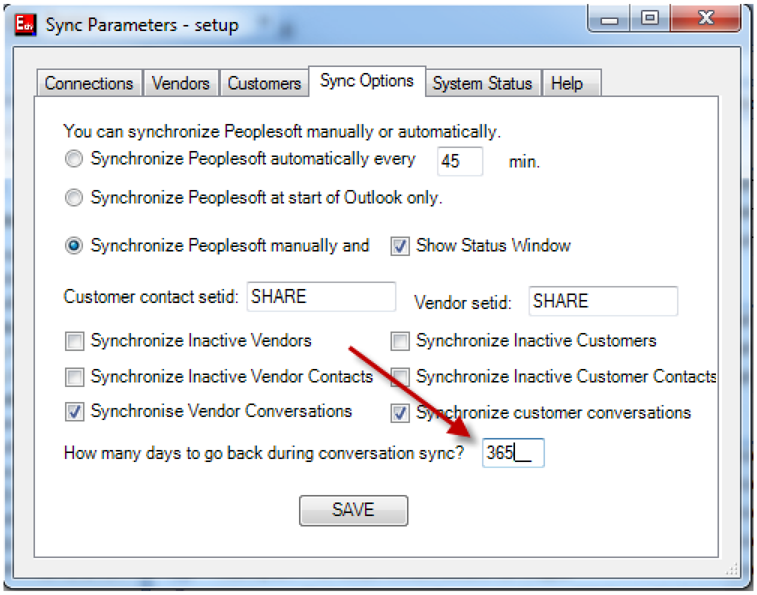
   b. At the start of outlook only

   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:

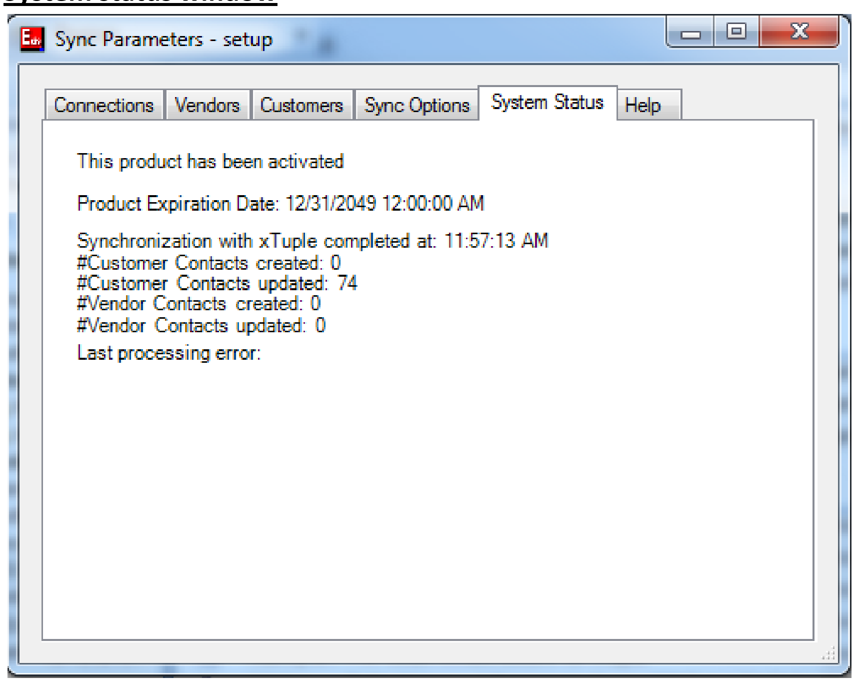


If you are going to use this to synchronize the conversations (they will appear in the body of the contact) you must select the number of days to go back to read the conversations. For example you may want to set this setting to 365 to bring in all the contact conversations for the last year:



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:

a. 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