



pipeliner
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ITechnologies

Microsoft® Outlook® Integration

Version 3.0

quick guide

pipeliner quick guide
MS Outlook 2010 Integration for MS Windows

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Officially Supported Microsoft® Outlook® versions for Windows:

MS Office® 2010 x86 (32 bit version)

MS Office® 2010 x64 (64 bit version)

Officially Supported Languages¹ for pipeliner Microsoft® Outlook® add-on:

English

German

¹ pipeliner Add-in for MS Outlook is only available in English and German. However, you can install the Add-in for all pipeliner languages available.

Download pipeliner MS Outlook Add-in

Please follow this link <http://www.pipelinersales.com/download/> to download MS Outlook Add-in.



Download Free Version

download and install pipeliner p-free, the free version of pipeliner - sales management tool.

The sales management software pipeliner is based on [Adobe® AIR® platform](#). Therefore, the installation of Adobe® AIR® is required in order to use pipeliner. The installation process is done automatically during the download, and may take some time.

Free Download - unlimited use in terms of time. **p-free** enables the immediate, free-of-charge, and unlimited use of pipeliner for your comprehensive opportunity management.

Automatic installation

In order to install pipeliner on your local operating system, please make sure that you have all required administration rights.

Change/Repair
Launch Now

Installation key steps
[Download PDF \(0.6 MB\)](#)

Manual installation

System Requirements

Windows	Minimal requirements	Recommended
CPU	Intel® Pentium® 4	Intel® Core™ Duo or faster processor

Current version:
pipeliner 3.0.1
Build 10536
Monday, 17th October 2011

Upgrade Notices
If you are upgrading your product from v2.6 to v3.0, please [read upgrade notices first](#).

ACTIVATION HowTo
1..2..3

Microsoft Office

pipeliner Outlook Addin
MS Office Version
2010 64bit

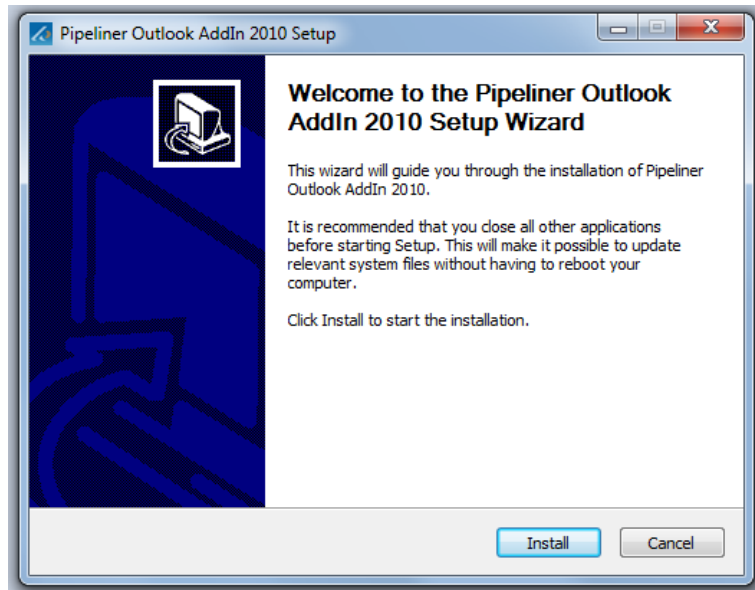
Download

1 Select the version of using MS Office version.

2 After you will select the language and Office version please click download button.

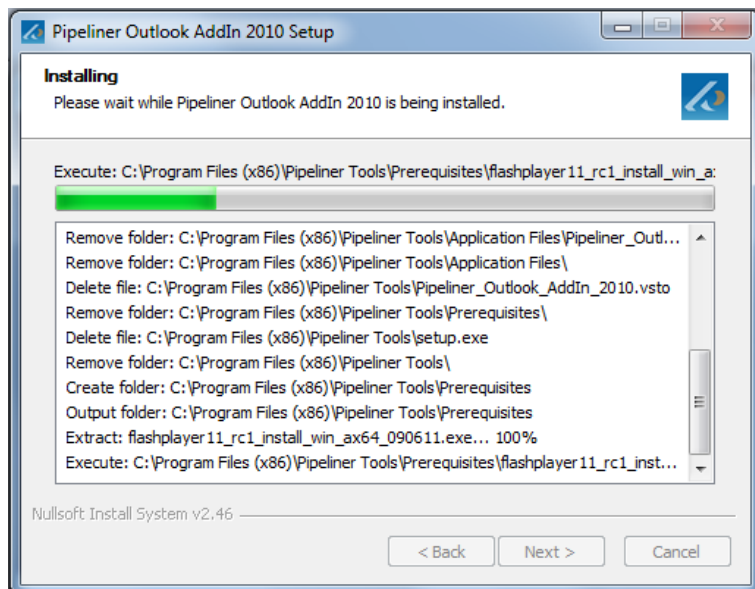
Install pipeliner MS Outlook Add-in

After downloading pipeliner MS Outlook Add-in, by double clicking on its installer, you will start installation process.

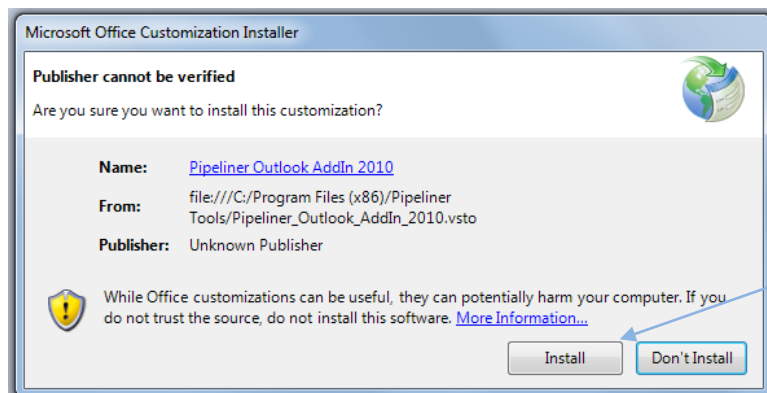


1 **Continue in installation by clicking the Install button.**

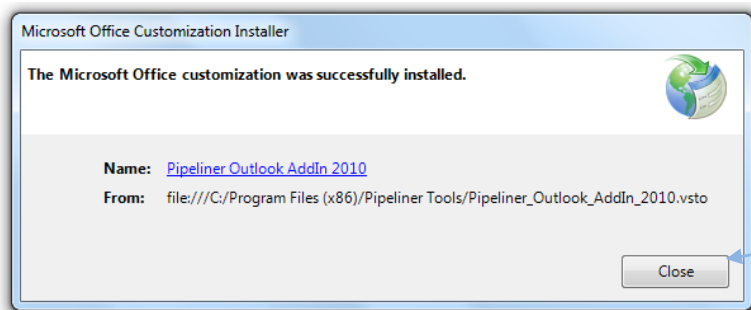
The Microsoft installer will guide you through the process of installing the pipeliner Add-in for MS Outlook.



2 Wait until pipeliner prepares Outlook Add-in for installation.

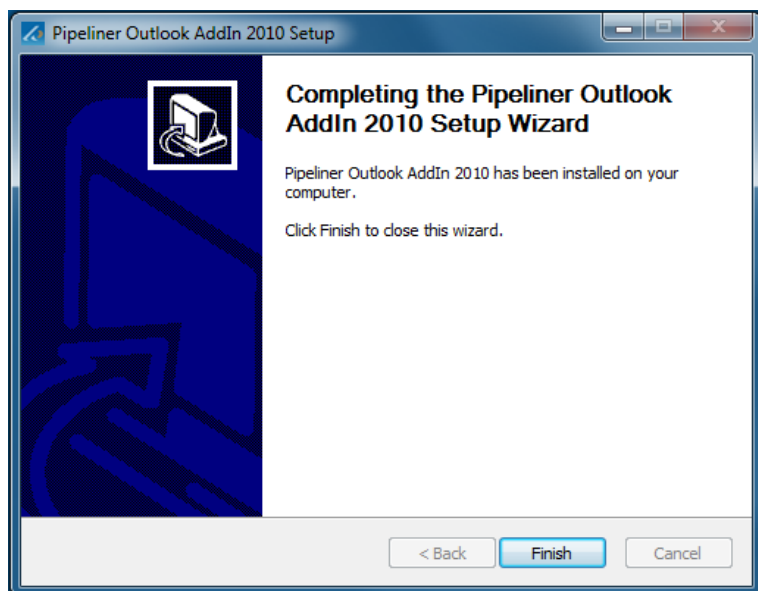


3 Click on the Install button in order to start the automatic installation process of Add-In itself.



4

Click on the close button to finish the installation process of Add-In.

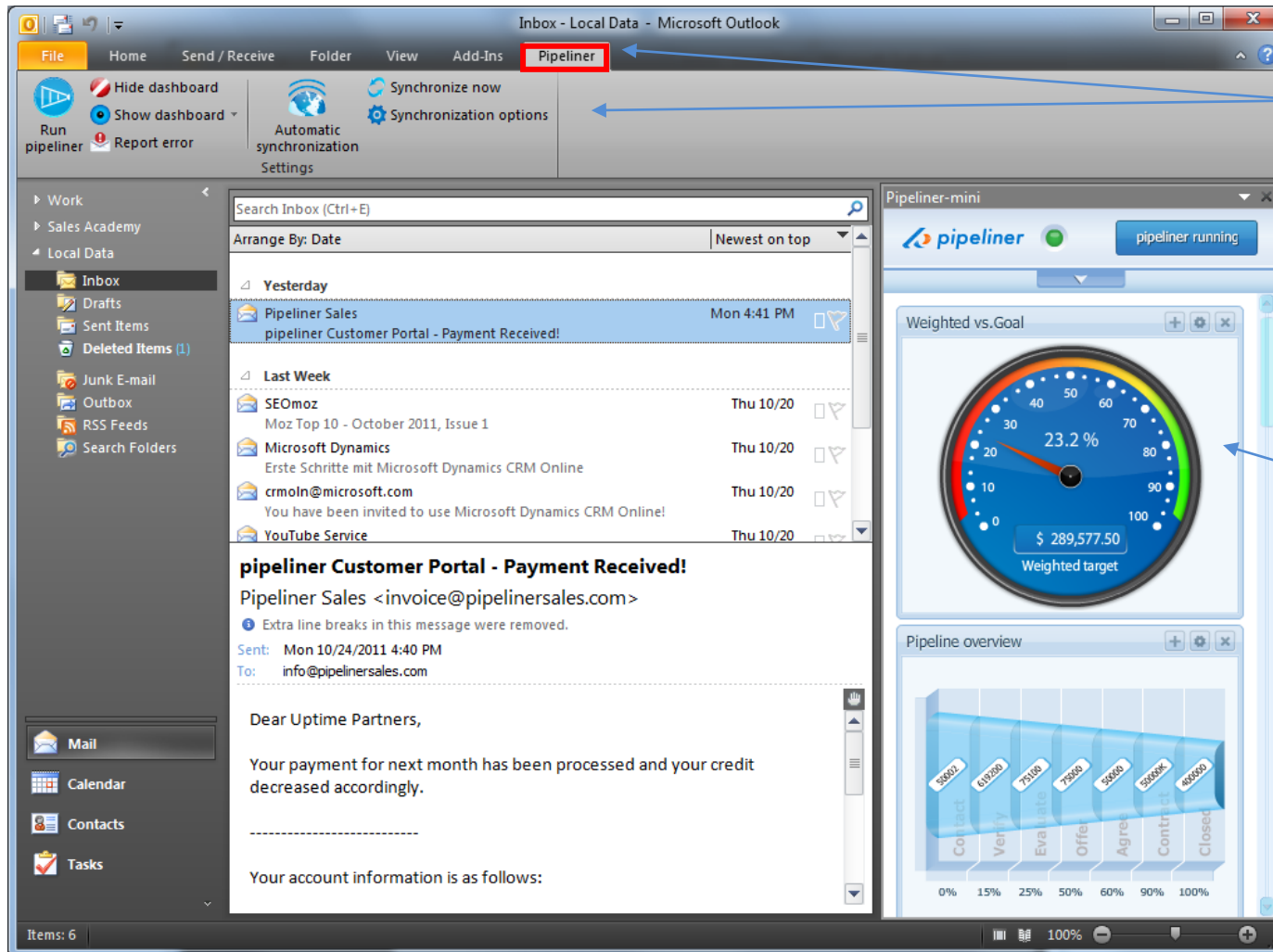


5

After the installation is done, click on the finish button to finish the installation process.

Getting started with pipeliner MS Outlook Add-in

After the successful activation of pipeliner MS Outlook Add-in, the system will add a new tab "pipeliner" to your tool bar.



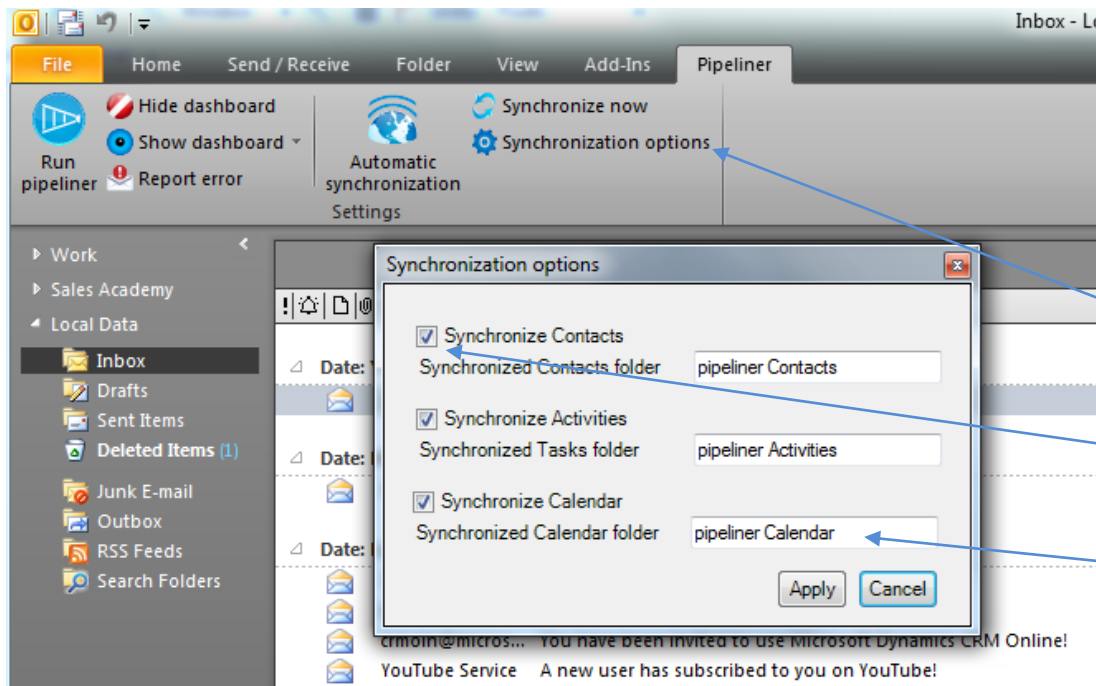
Here you are able to see the pipeliner tab with its ribbon options

Here you can see pipeliner-mini. A communicator that shows your pipeliner dashboard charts.

Synchronizing MS Outlook Data with pipeliner

MS Outlook Add-In automatically detects your pipeliner database. Therefore, at the first run of MS Outlook, you will be prompt to set your synchronization options.

The synchronization options enable you to set the folder preferences for your MS Outlook where all sync data will be stored. You are able to create and name specific folders to sync contacts, activities and tasks.



Note: All data within the "pipeliner contacts" folder are fully synchronized. Therefore, any changes made to a contact within the pipeliner address book will be visible in MS Outlook after clicking the import process and vice versa.

Click on the Synchronization Options icon.

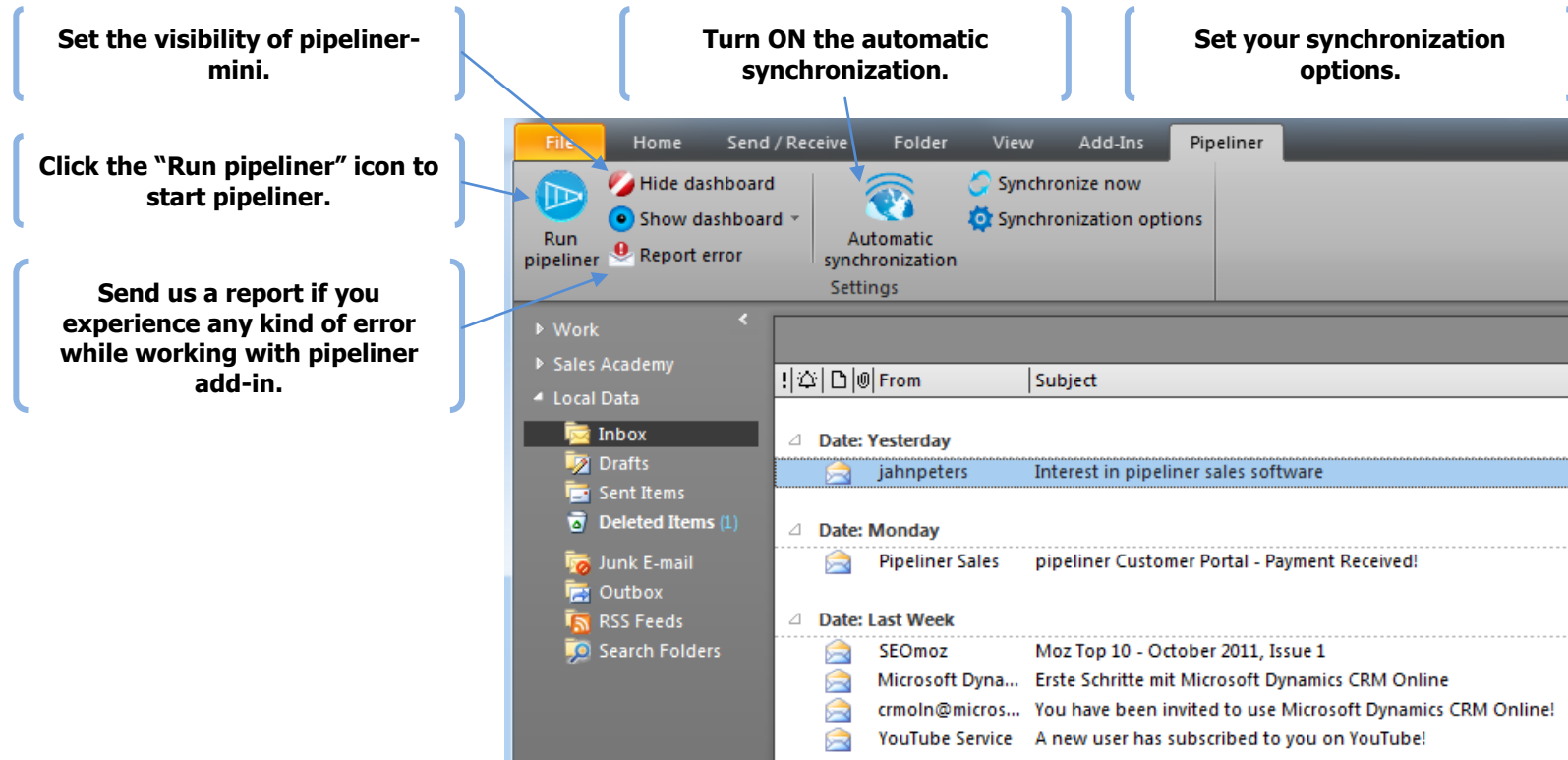
Check the data you would like to synchronize.

Name the folder to where you would like to sync your data.

After you make your initial synchronization of between MS Outlook and pipeliner, the system will add new "pipeliner" folders into your contacts, calendar and tasks section.

Working with pipeliner MS Outlook Ribbon

Using the pipeliner integration ribbon you can start pipeliner via Outlook, enable the visibility of pipeliner-mini and setup the synchronization preferences between pipeliner and outlook.



The screenshot shows the Outlook ribbon with the Pipeliner tab selected. Three callout boxes provide instructions:

- Set the visibility of pipeliner-mini.** (Points to the 'Show dashboard' button)
- Click the "Run pipeliner" icon to start pipeliner.** (Points to the 'Run pipeliner' button)
- Send us a report if you experience any kind of error while working with pipeliner add-in.** (Points to the 'Report error' button)

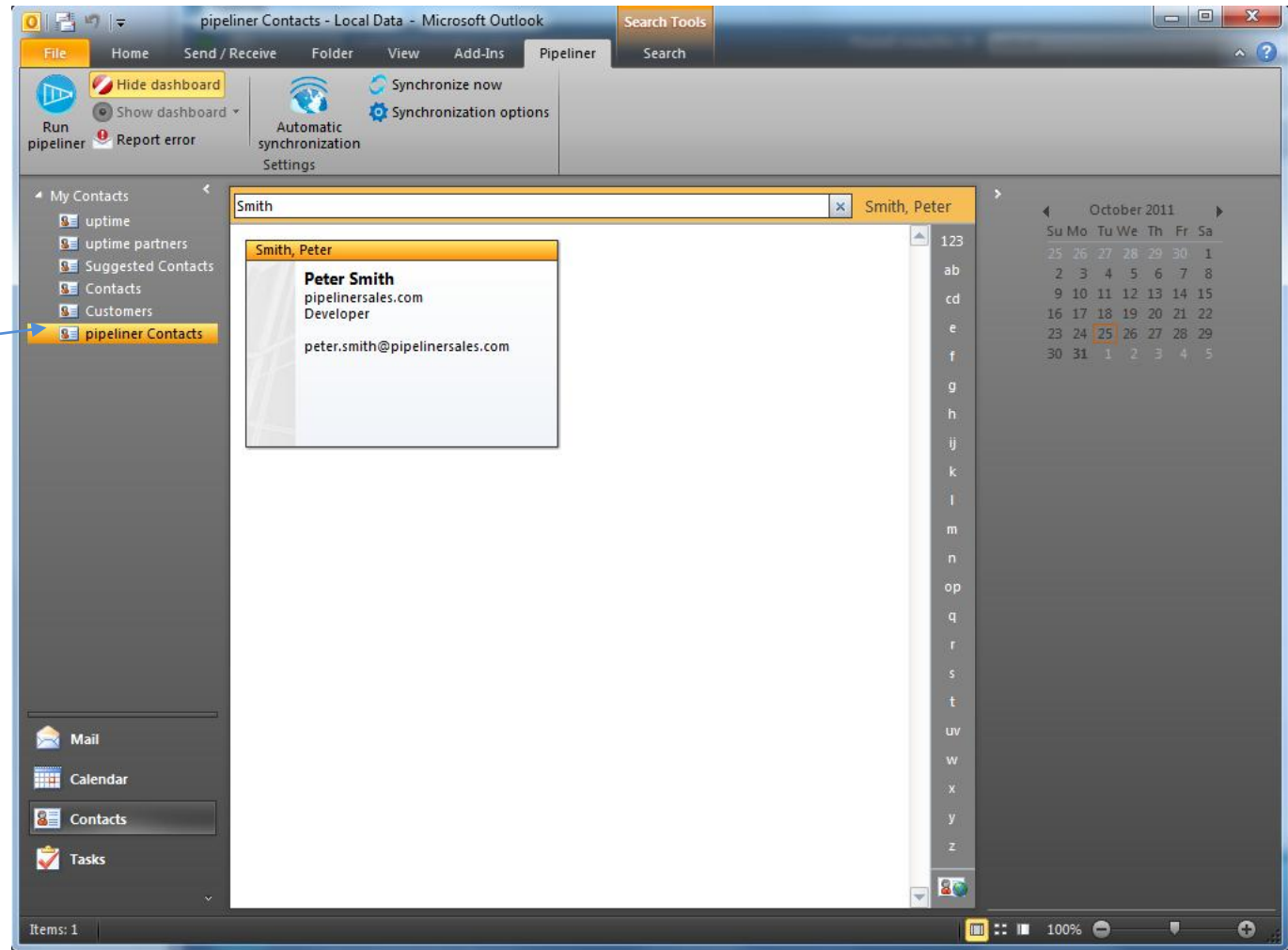
Other visible options on the ribbon include 'Hide dashboard', 'Automatic synchronization Settings', 'Synchronize now', and 'Synchronization options'.

Synchronize your contacts

After first initial synchronization between MS Outlook and pipeliner, the unique pipeliner outlook folder will be created and all data **within this folder** are now fully synchronized with pipeliner **private address book data**.

Click the "pipeliner contacts" folder to see or edit synchronized contacts.

Tip: If you would like to add your already existing contacts from Outlook to pipeliner, you need to copy them to the "pipeliner contacts" folder.

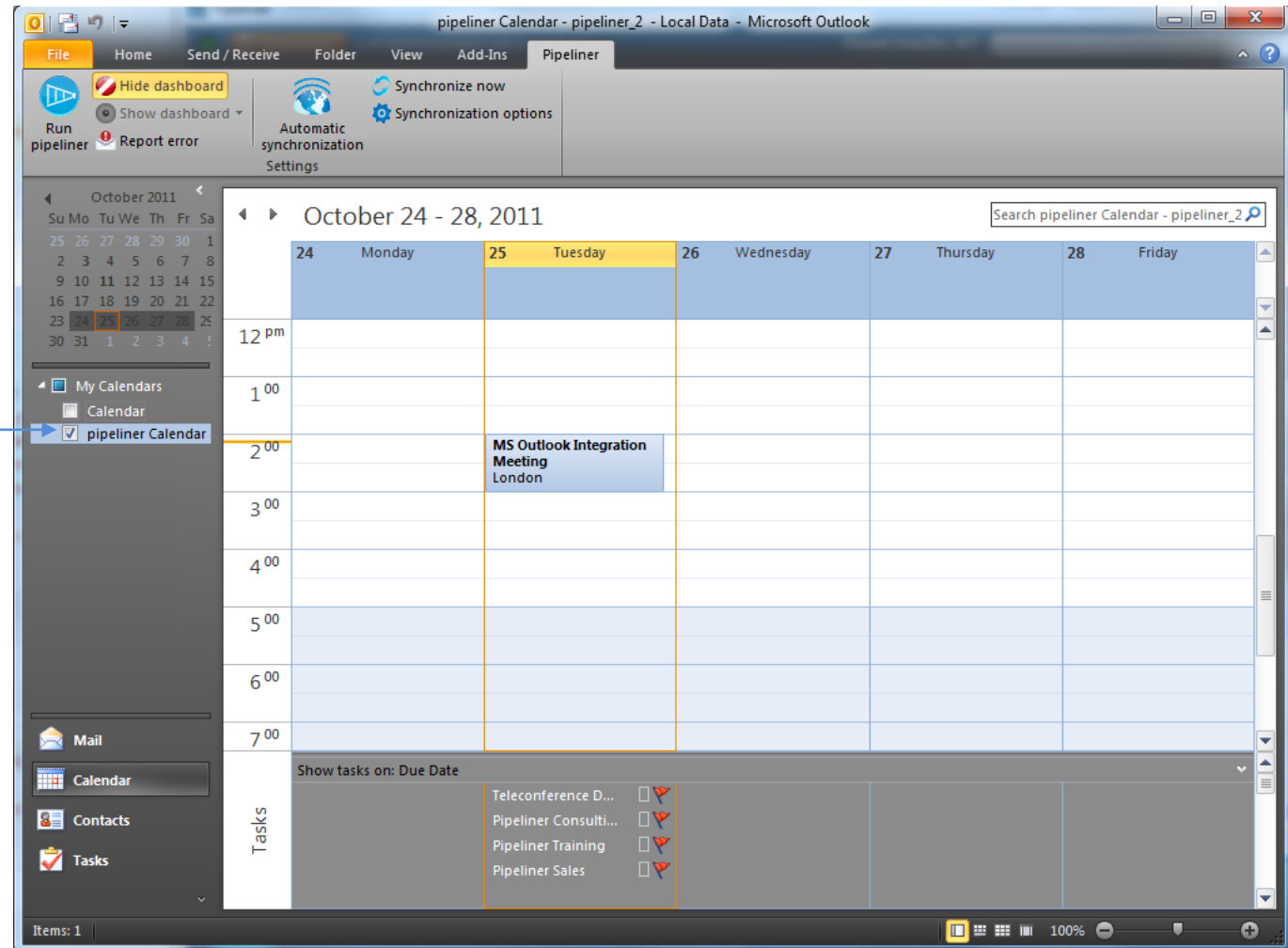


Synchronizing your calendar data

After first initial synchronization between MS Outlook and pipeliner, the unique pipeliner outlook folder will be created and all data within this folder is now fully synchronized with pipeliner appointments and task due dates.

Click the "pipeliner calendar" folder to see or edit synchronized meetings.

Tip: If you would like to add your already existing meetings from Outlook to pipeliner, you need to copy them to the "pipeliner calendar" folder.

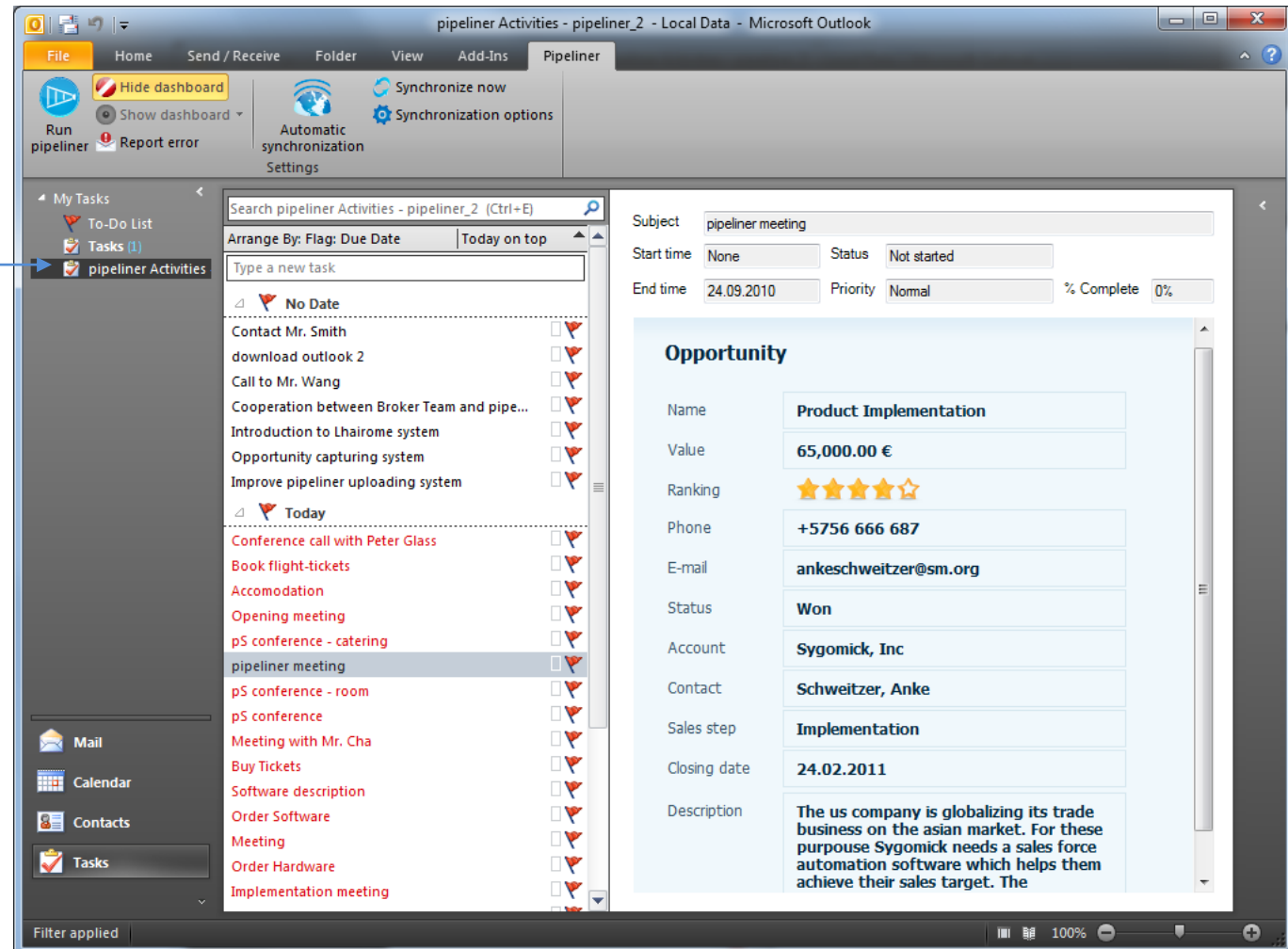


Synchronizing your Tasks

After first initial synchronization between MS Outlook and pipeliner, the unique pipeliner outlook folder will be created and all data within this folder is now fully synchronized with pipeliner tasks and its reminders.

Click the "pipeliner calendar" folder to see or edit synchronized meetings.

Tip: If you would like to add your already existing tasks from Outlook to pipeliner, you need to copy them to the "pipeliner activities" folder.

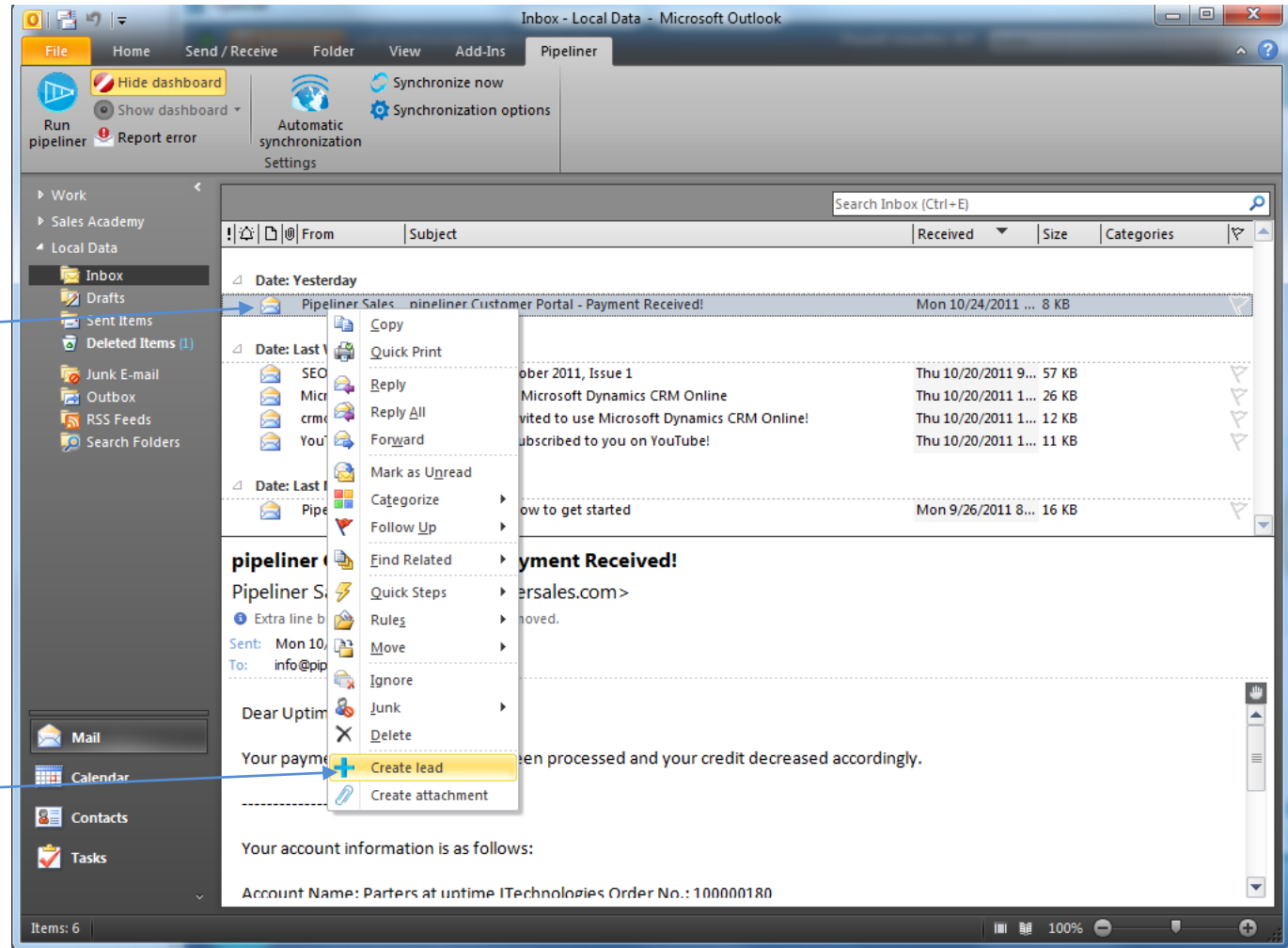


Creating a lead from an received email

If you receive an email from a potential customer, you are now able to create it into the pipeliner as a lead through MS Outlook.

Use the right click to see additional options related to the received email.

Select the option "Create lead" in order to create a new lead into your lead panel in pipeliner.

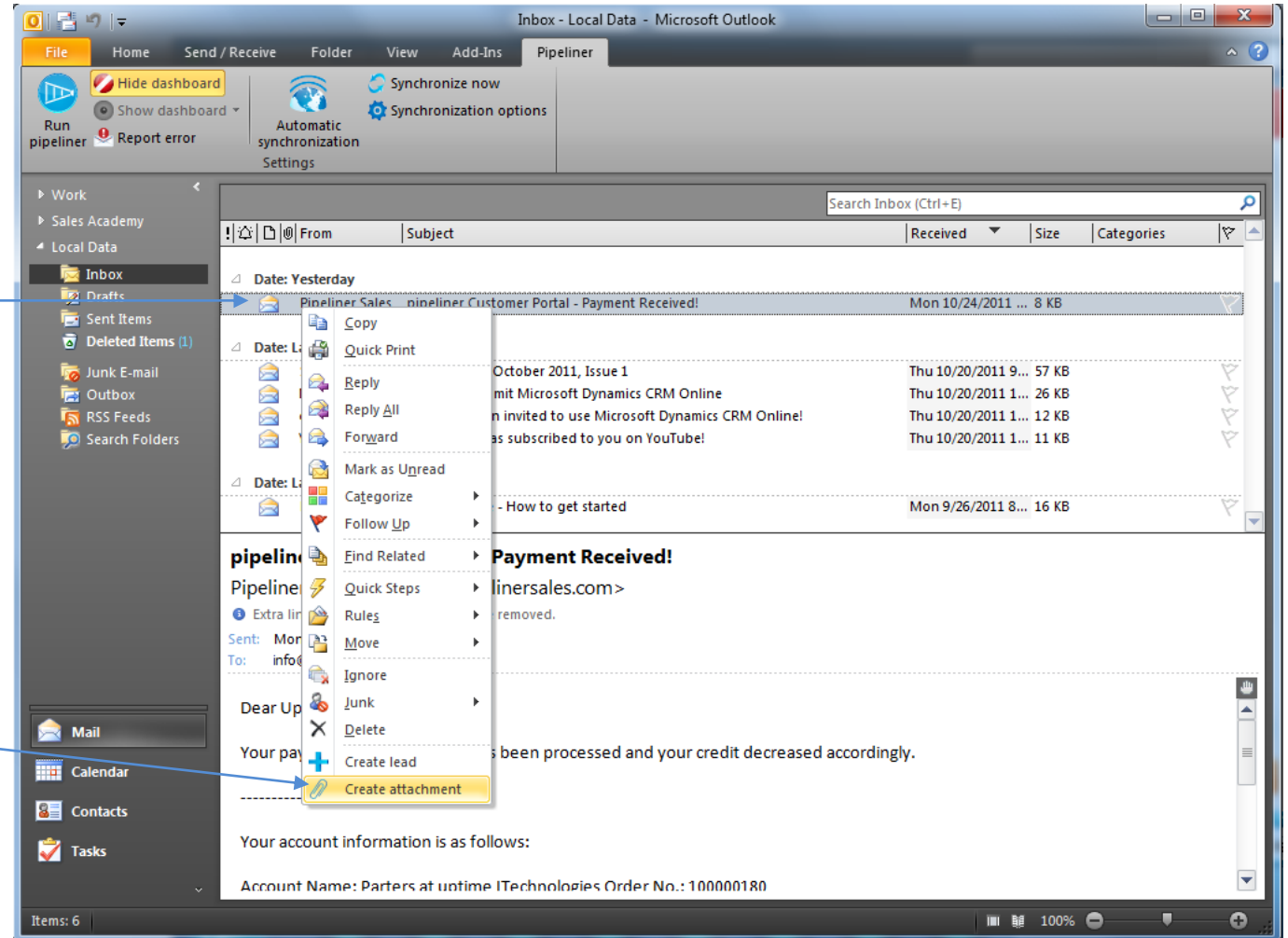


Create a document to an opportunity from email content or its attachment

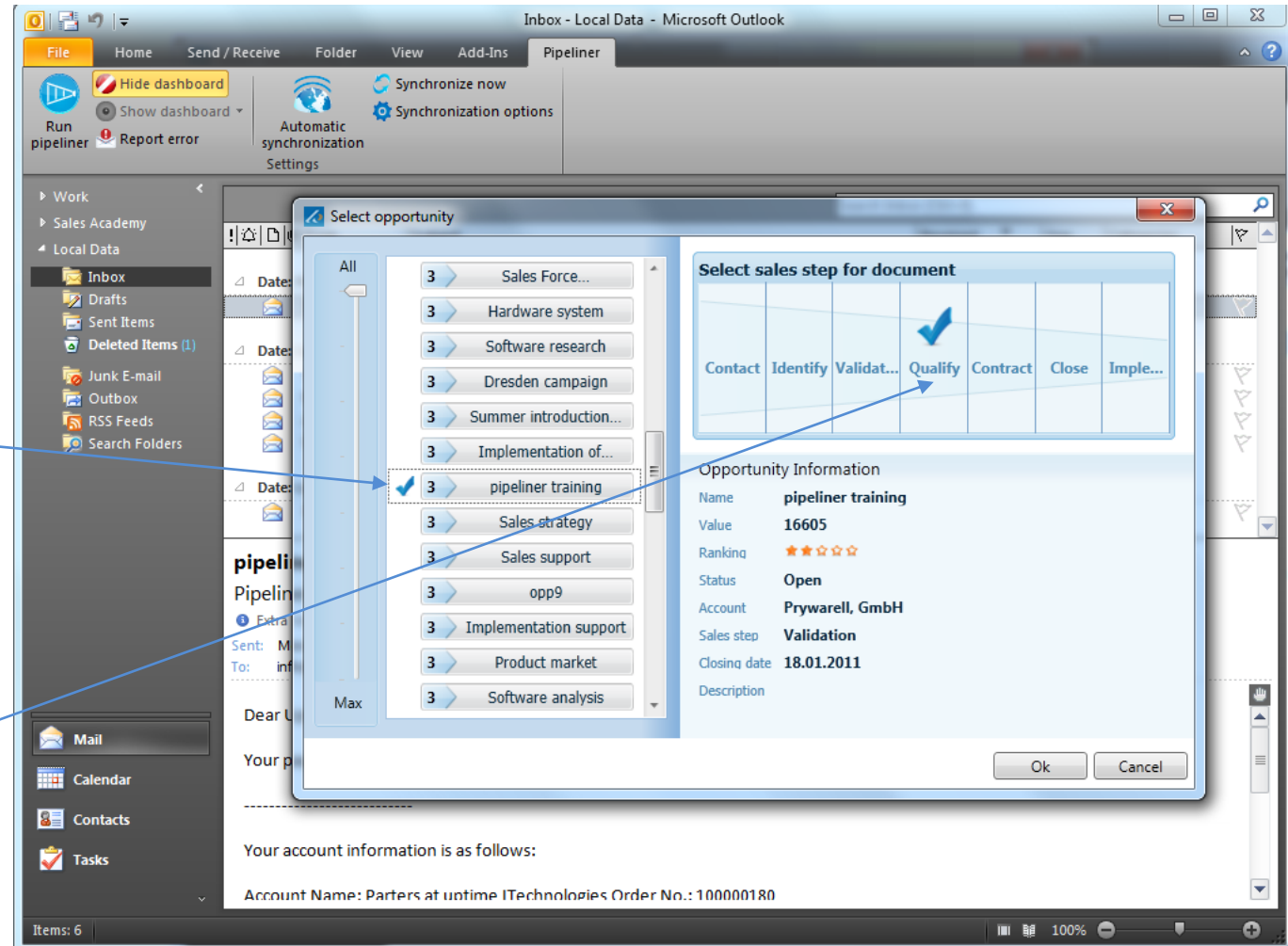
If you receive any kind of attachment per email, you can easily save it into the pipeline as a document for a specific opportunity and preferred sales step.

Use the right click to see additional options related to the received email.

Select the option "Create attachment" in order to create a new document for an opportunity in your sales pipeline.



The pipeliner MS Outlook Add-In will give you the ability to define to which opportunity in your sales pipeline you would like to relate it and also to which sales step in your defined sales process.



Select the opportunity to which you would like to attach the email document.

Tip: The number next to the opportunity is the number of its related sales step.

Select the sales step to which you would like to attach it.