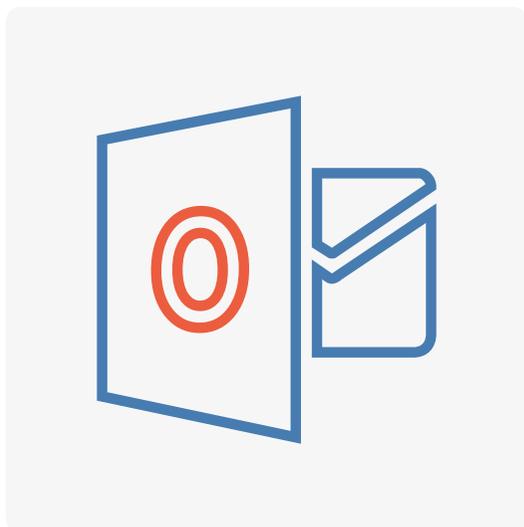


Pipeliner CRM Arithmetica Guide

Add-In for MS Outlook



Add-In for MS Outlook

Learn how to use sales lead management with Pipeliner MS Outlook Add-In.

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1. Setting up Pipeliner Add-In

1.1. How do I install Pipeliner Add-In

Pipeliner Add-In is an add-in client application that runs within your MS Outlook application.

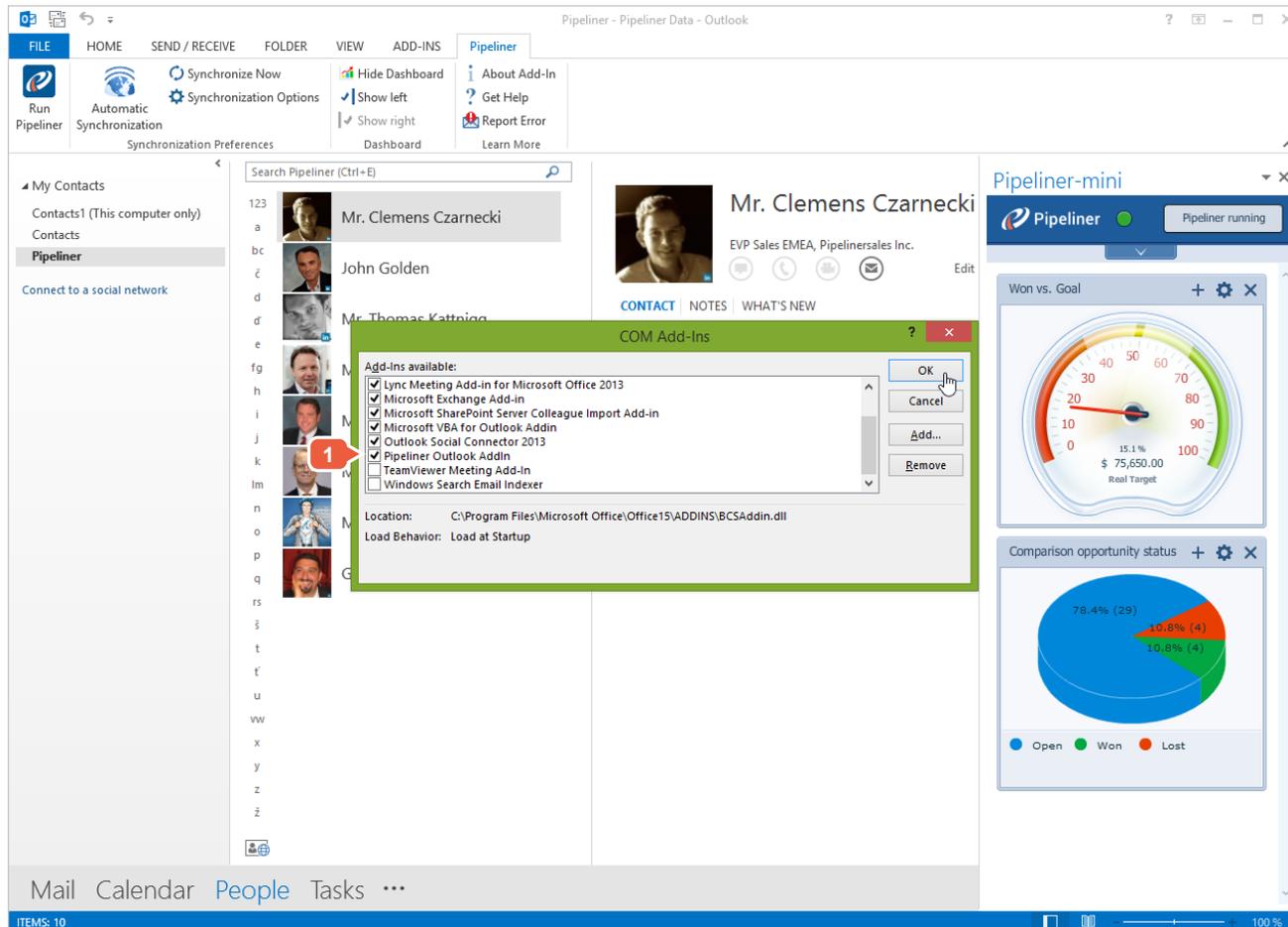
DESCRIPTION

1 Download the setup executable file anywhere on your Windows PC. When the download completes, double-click the file to launch the setup program.

WEB LINKS:
In order to install Pipeliner please open your favorite web browser and visit our Pipeliner Web site: www.pipelinersales.com/downloads

1.2. How do I activate Pipeliner Add-In

Pipeliner Add-In for Outlook is extremely helpful for managing your contacts, leads, tasks and meetings within your outlook. In order to use Pipeliner Add-In you need to activate it within the Add-In center.

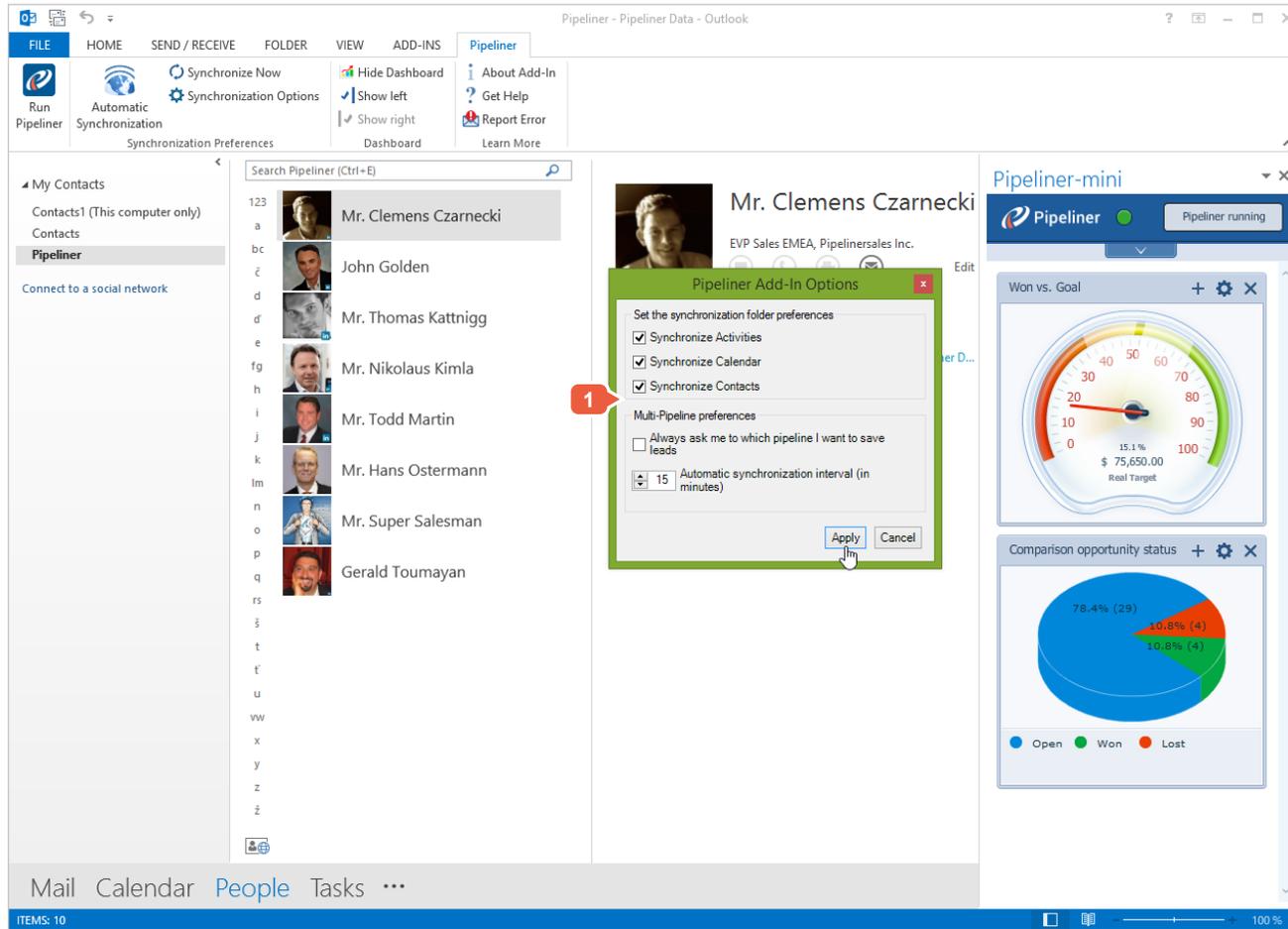


DESCRIPTION

- 1 › Go to your MS Outlook and click on the FILE and then on the OPTIONS.
- › In the categories pane, click on the ADD-INS. At the bottom of the window see MANAGE and from the dropdown menu select COM ADD-INS and click GO.
- › Within the list of Add-Ins available and make sure that the Pipeliner Outlook Add-In is checked and click OK.

1.3. How do I setup the Sync

Start your Pipeliner Application first and then your MS Outlook. The System will request the synch options and the folder settings to setup.



DESCRIPTION

1 YOU HAVE THE FOLLOWING OPTIONS DURING THE SYNC

Sync Options – by clicking on the SYNC OPTIONS icon you can see your Pipeliner to Outlook sync preferences.

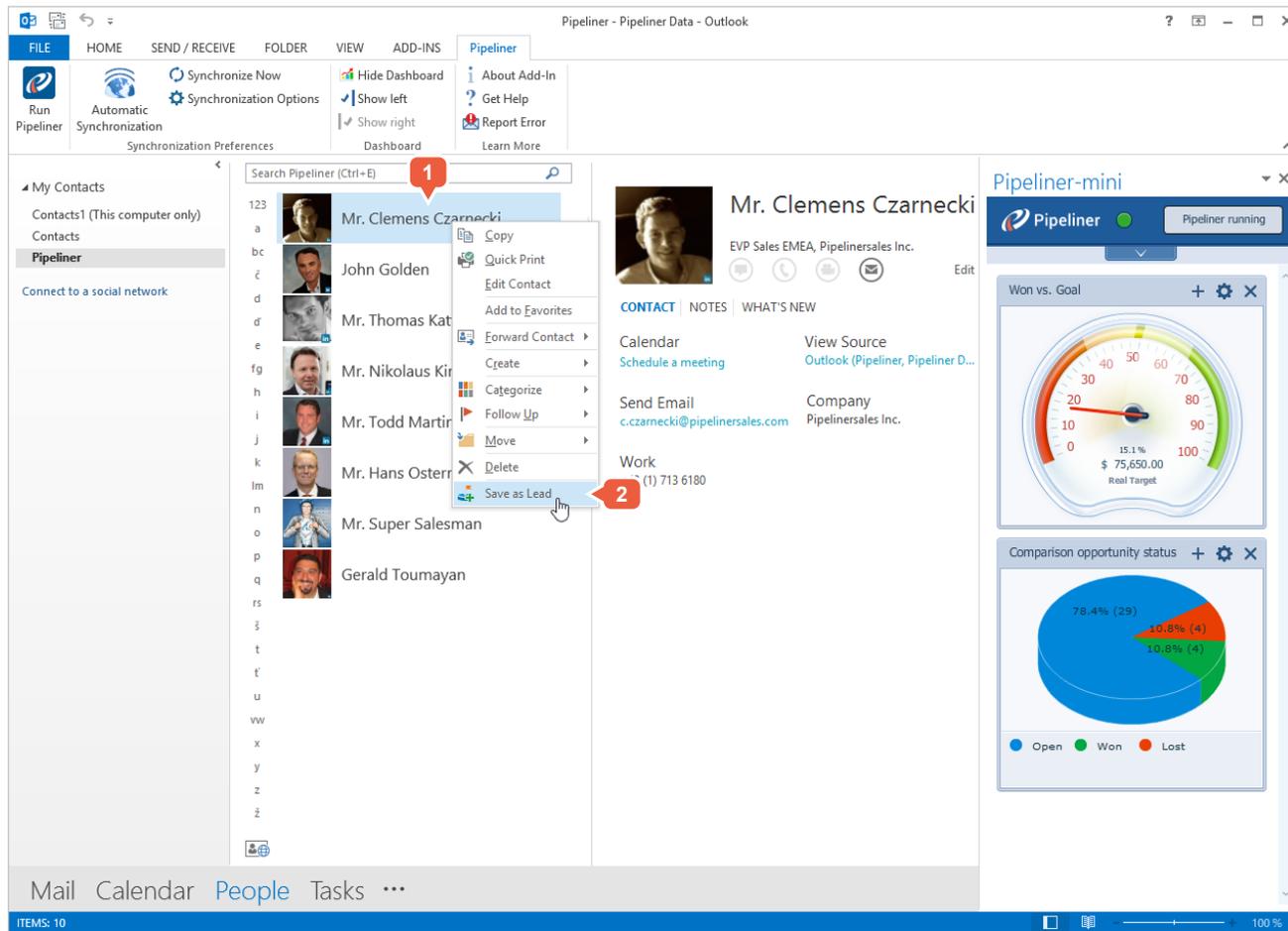
Sync data – by checking the box you will set its synchronization between Pipeliner and Outlook.

Folder Name – define your preferred name of sync folder between Pipeliner and Outlook.

2. Understanding Pipeliner Add-In for Outlook

2.1. How do I create a Lead to Pipeliner

Pipeliner Add-In for Outlook enables you to easily save your incoming e-mails senders as leads into Pipeliner. You can create lead from the e-mail you have received or from your contacts in your MS Outlook address book.

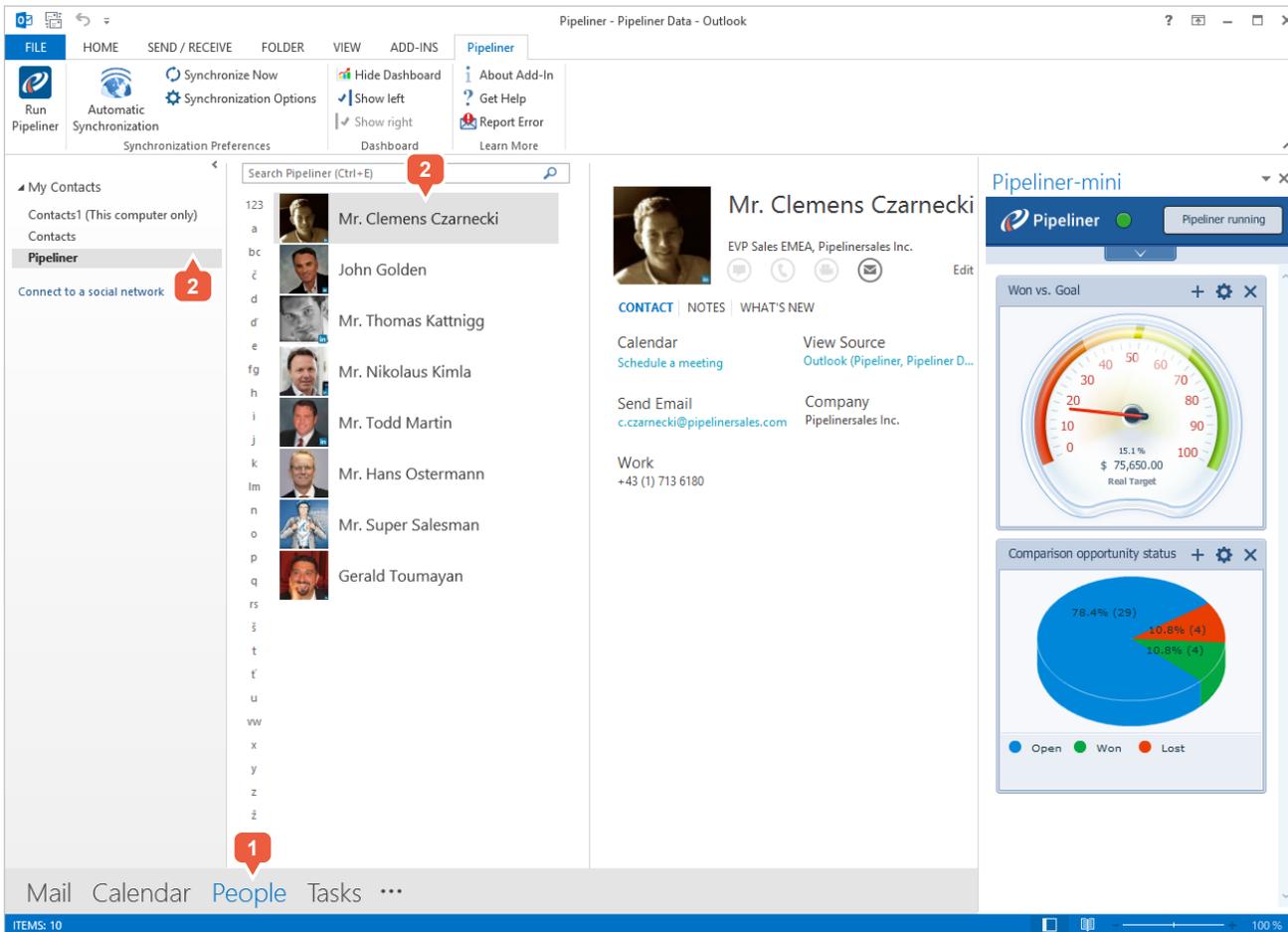


DESCRIPTION

- 1 In order to create new lead into Pipeliner, right-click on any e-mail or contact in your MS Outlook.
- 2 Within the menu click on the SAVE AS LEAD. Pipeliner Add-In will automatically save and synchronize your new lead to Pipeliner application into Lead Panel.

2.2. How do I add Contacts to Pipeliner folder

Pipeliner Add-in automatically adds unique folders to your MS Outlook for your Calendar, Tasks and Contacts. Only the data within these folders are fully synchronized with Pipeliner application.

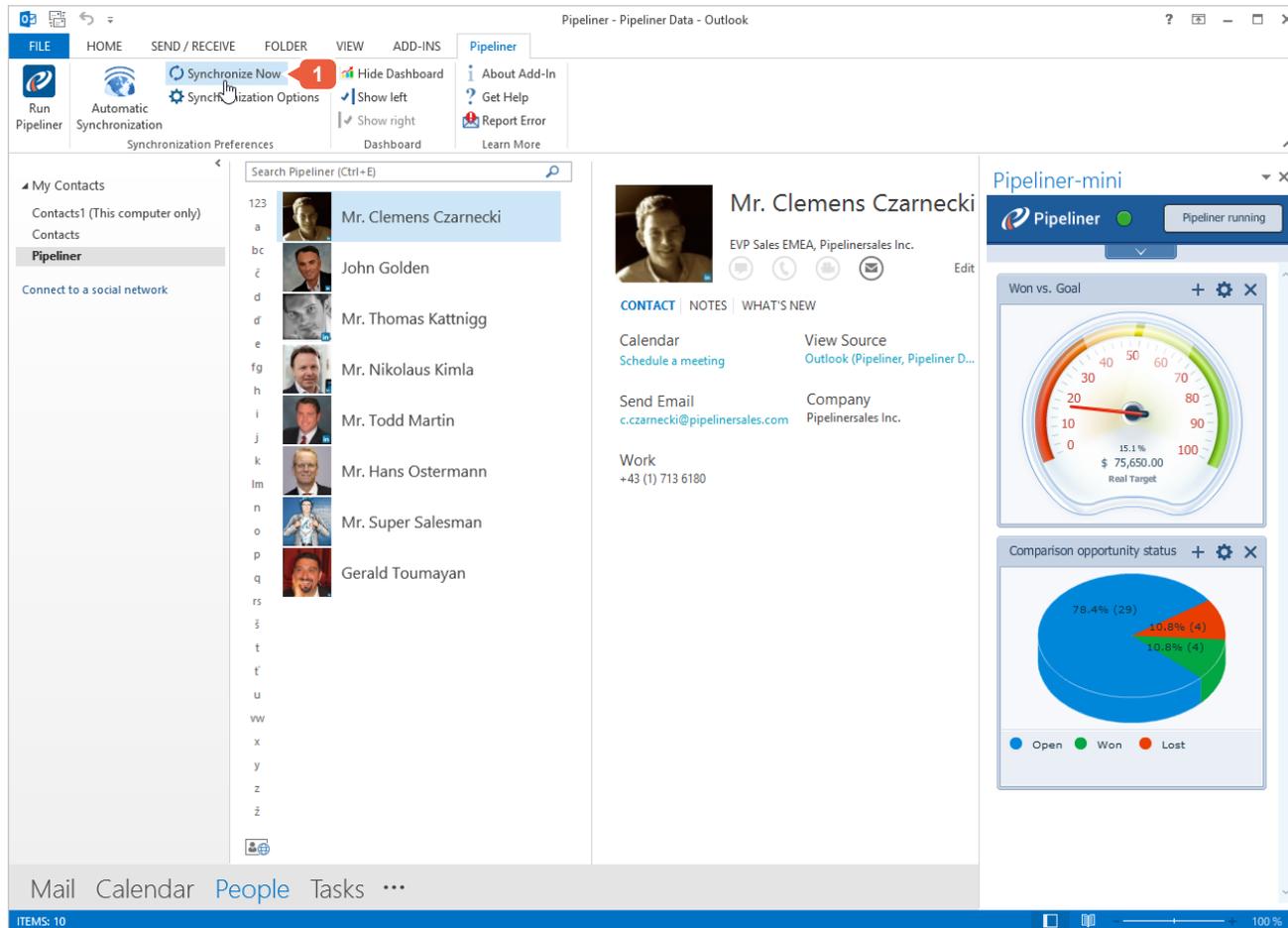


DESCRIPTION

- 1 Open your MS Outlook and click CONTACTS.
- 2 Choose one of your contacts from any of your current folder and drag it into the newly created Pipeliner folder.

2.3. How do I Sync my work

Pipeliner Add-in automatically adds unique folders to your MS Outlook for your Calendar, Tasks and Contacts. Only the data within these folders can be synchronized with Pipeliner application.



DESCRIPTION

1 In order to synchronize your data click on the SYNCHRONIZE NOW button within the Pipeliner's top menu within Outlook ribbon.

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