

Setting up your CRM to sink with outlook 2003

Please go to: <ftp://ftp.promero.com/Downloads/CRM/>

The file is called SplendidCRM_Plug-in_for_Outlook_1.0.2328.37722.exe

Username= ftpuser

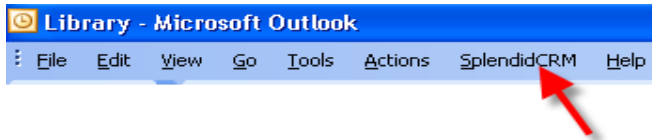
Password=ondemand

Close outlook program before installation.

- double click on the file and Run
- Click Run again on the next window
- Next on Welcome window
- Accept the License Agreement
- Next on Select Installation Folder window
- Next on Confirm Installation window
- Close on Installation Complete window

Open Outlook.

Under Menu Tab SplendidCRM click SplendidCRM Settings



Options Tab

User Options:

Application: SplendidCRM

URL: <http://www.prostar.com/thatsbiz>


Authentication Options:

Authentication: Basic

Username: **** (to access CRM)

Password: ****(to access CRM)

SplendidCRM - Settings

 **SplendidCRM**
software, inc.

Options | Actions | Connection

User Options

Application: SplendidCRM SugarCRM

URL:
(e.g. http://yourcompany.com/splendidcrm/)

Authentication Options

Authentication: Windows Basic

Username:

Password:

Sync Options

Auto-sync Contacts with SplendidCRM every minutes

Auto-sync Calendar with SplendidCRM every minutes

Email Options

Always send attachments to Sugar.

Prompt before sending attachments.

Never send attachments to Sugar.