



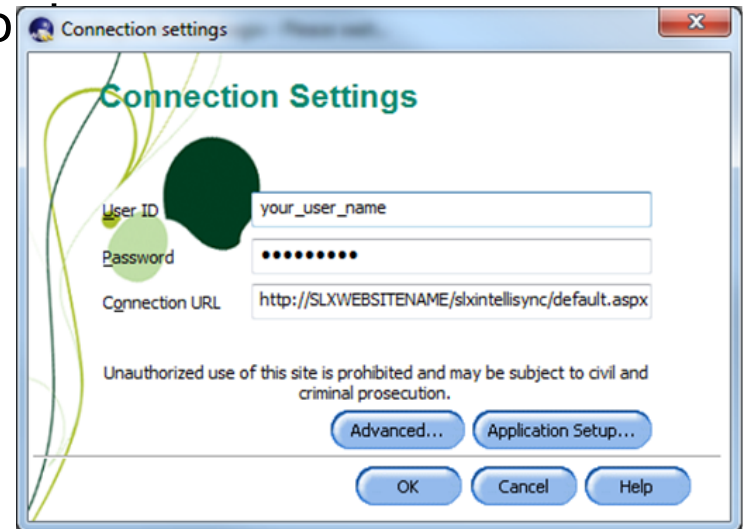
SalesLogix 7.5



Intellisync for Outlook

Setting up Intellisync for Outlook

- ▶ On the **Start** menu select **Programs | Sage SalesLogix**, and select the **Intellisync for SalesLogix** folder, and then click on **Intellisync for SalesLogix**. The Intellisync for SalesLogix dialog box opens.
- ▶ Click **Setup**.
- ▶ In the **User ID** box, type your Sage SalesLogix user name.
- ▶ In the **Password** box, type your password.



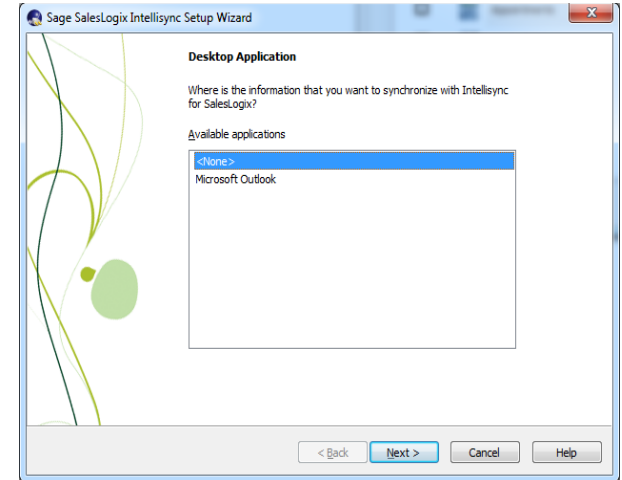
Setting up Intellisync for Outlook

- ▶ In the Connection URL box, type the path to your Intellisync for SalesLogix portal.
 - ▶ The path for Network Users is: <http://servername:3333/SlxIntellisync/default.aspx>
Check with your Administrator to confirm path.
 - ▶ The path of Remote Users is: <http://localhost:8087/SlxIntellisync>
- ▶ Click **Application Setup**.
- ▶ On the **Setup** screen, select the type of data you want to synchronize (for example, Appointments).
- ▶ Click **Setup Wizard**.

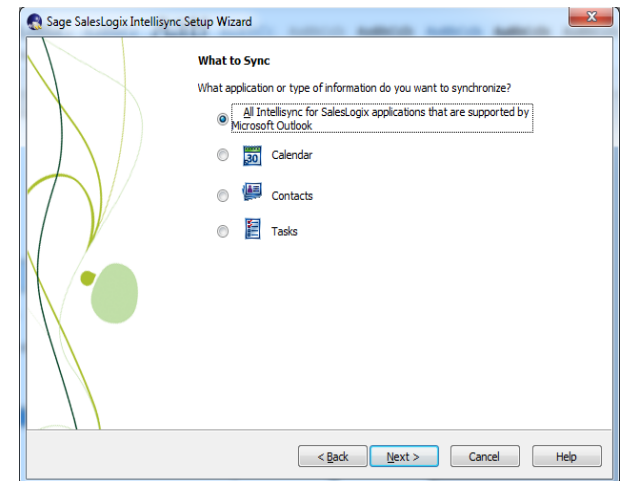


Intellisync for Outlook

- ▶ On the Desktop Application screen, select **Microsoft Outlook**.
- ▶ Click **Next**.

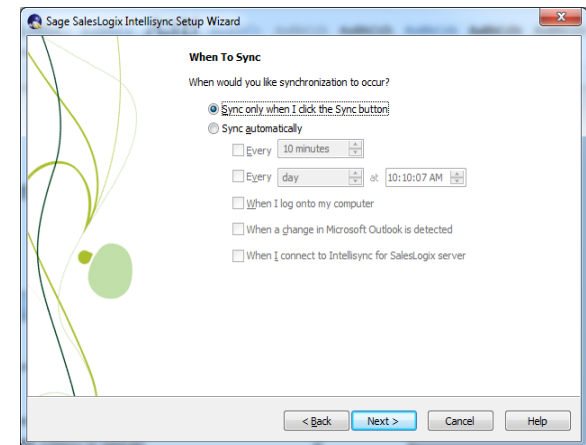
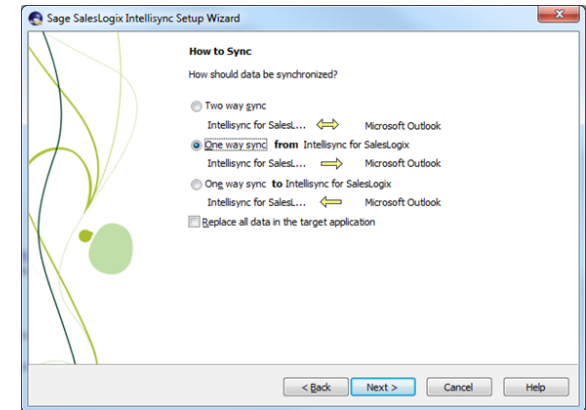


- ▶ On the **What to Sync** screen, select **All Intellisync for SalesLogix applications that are supported by Microsoft Outlook**.
- ▶ Click **Next**.



Intellisync for Outlook

- ▶ On the **How to Sync** screen, select **One way sync**. We recommend to only use one way sync, two way sync is prone to cause duplicates.
- ▶ Click **Next**.

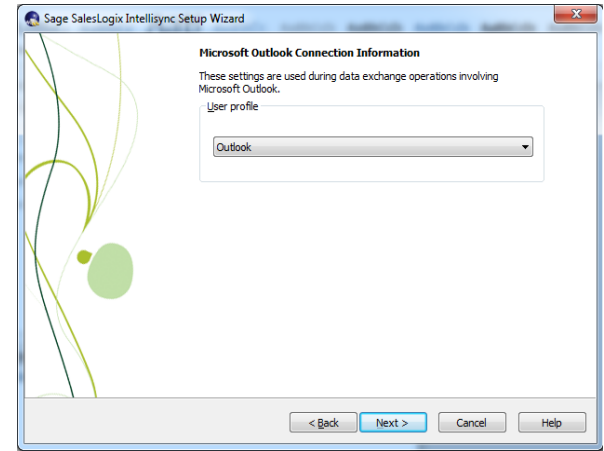


- ▶ On the **When To Sync** screen, select when you want synchronization to occur.

- ▶ Click **Next**

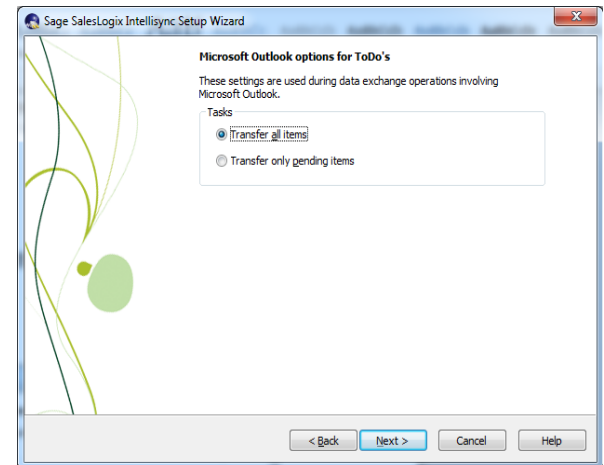
Intellisync for Outlook

- ▶ On the **Microsoft Outlook Connection Information** screen, select your **Outlook** user profile.
- ▶ Click **Next**.



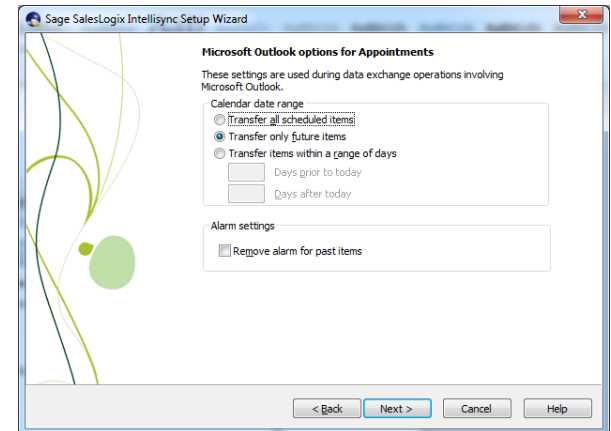
Complete additional screens as appropriate for the type of information you are synchronizing.

- ▶ On the Microsoft Outlook options for To Do's screen, select **Transfer** all items. This option synchronizes all active, non-completed, and completed To Do's.

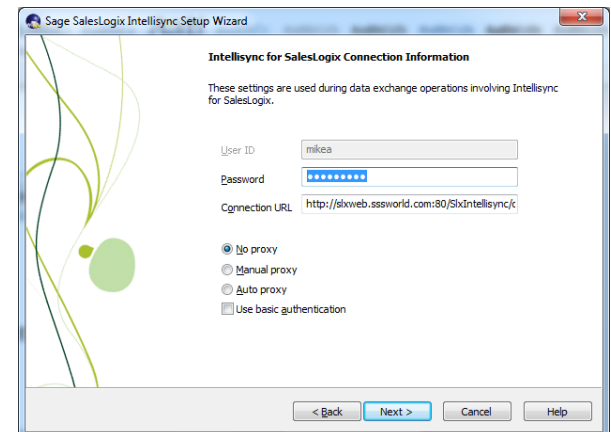


Intellisync for Outlook

- ▶ On the Microsoft Outlook options for **Appointments** screen, select **Transfer only future items**.



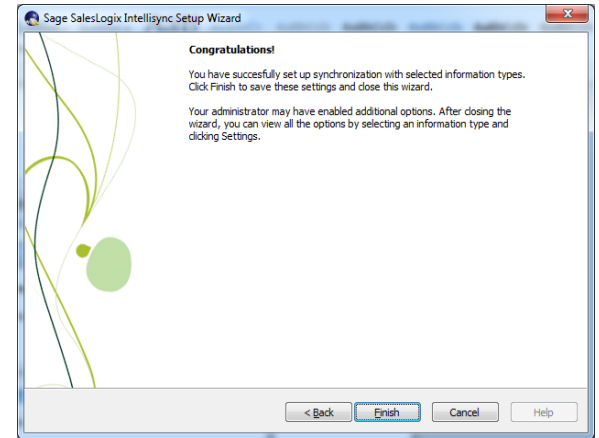
- ▶ On the **Intellisync for SalesLogix Connection Information** screen, verify your Sage SalesLogix user **ID**, **password**, and the connection to your Intellisync for SalesLogix portal.



- ▶ Click **Next**.

Intellisync for Outlook

- ▶ The Congratulations! Screen opens that says you have successfully set up synchronization.
- ▶ Click **Finish**.
- ▶ Click **Close**.



Note - If you have not already done so, you must select the **SyncSalesLogix** group.

(This is an AdHocGroup of Contacts you must create in the SalesLogix Client indicating which Contacts you want to sync with Outlook).