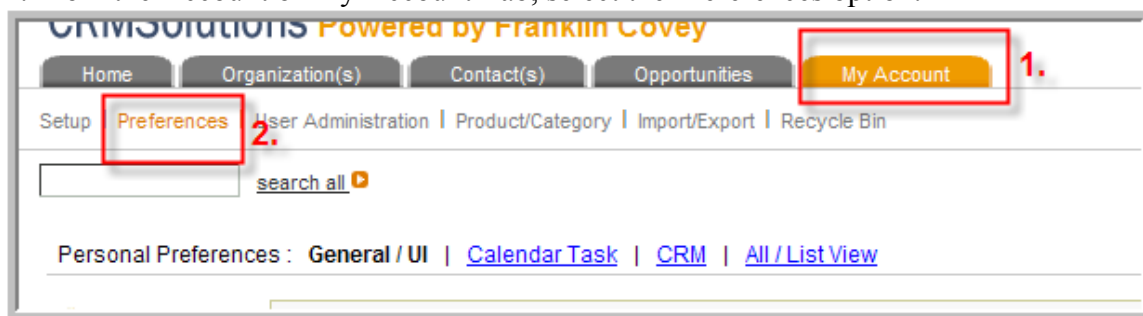


Outlook Sync

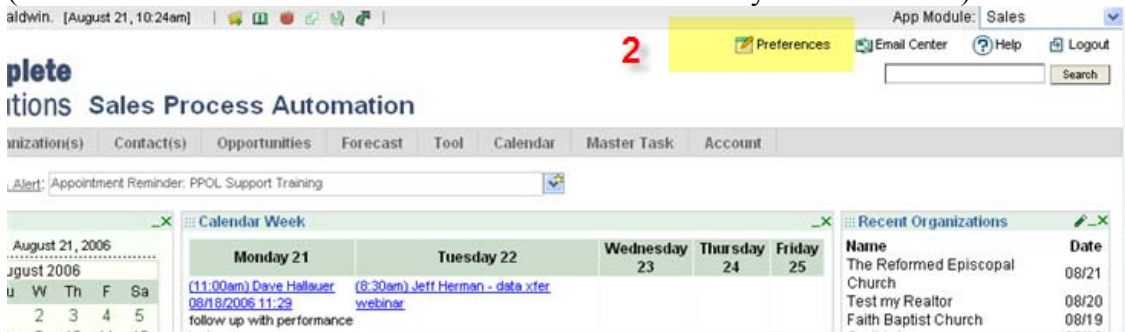
The first time that you synchronize to Outlook you will need to download the Outlook sync client to your desktop. Thereafter, each time you would like to sync to outlook, you will initial the synchronization from the sync icon on your desktop.

To download the Sync client:

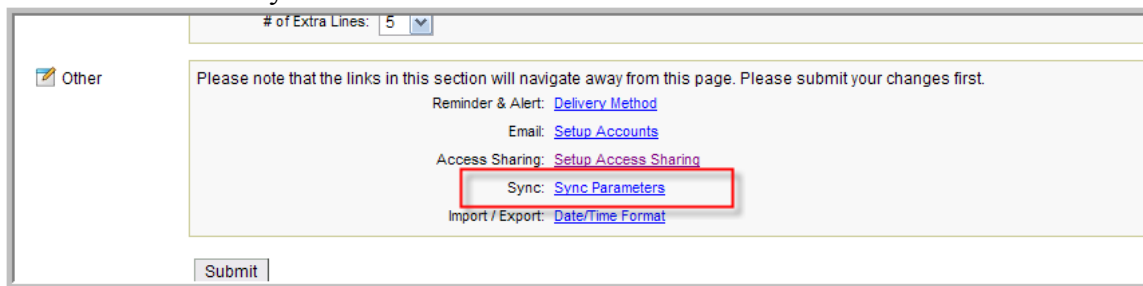
1. From the Account or My Account Tab, select the Preferences option.



(Screen above is from the PPOL version. Your screen may look as below.)



2. Click the link to Sync Parameters



3. If the Box is not checked, you must check the box, then click submit. If the box is checked you should click the MS Outlook Sync Client link.

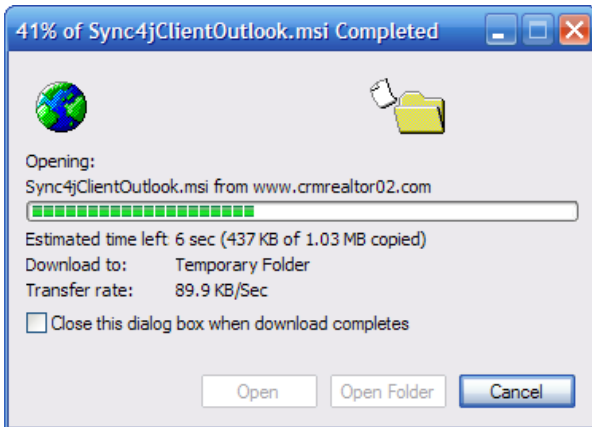
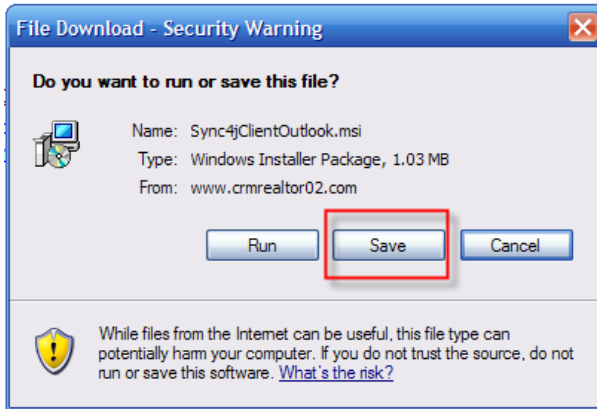
Sync Parameters

Enable Outlook/Handheld Sync Engine

Submit

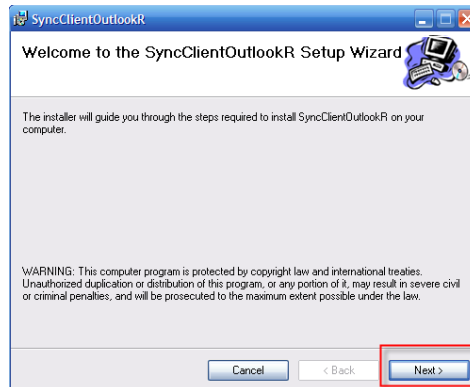
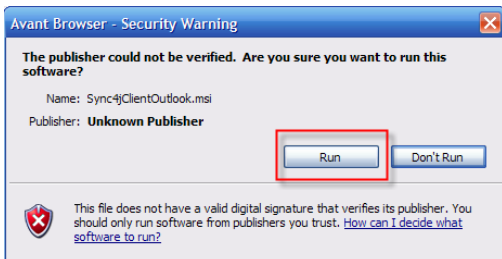
- ▶ **NEW** For Windows XP: Download [MS Outlook Sync Client](#) ([Flash Tutorial](#))
- ▶ For Windows PC: Download [Outlook/Handheld Sync Client](#).
- ▶ For Mac OS X: Download [Mac OSX Sync Client](#).
- ▶ View [Flash Tutorial](#).
- ▶ View [Another Flash Tutorial](#).
- ▶ View [Sync with Mac Client](#).

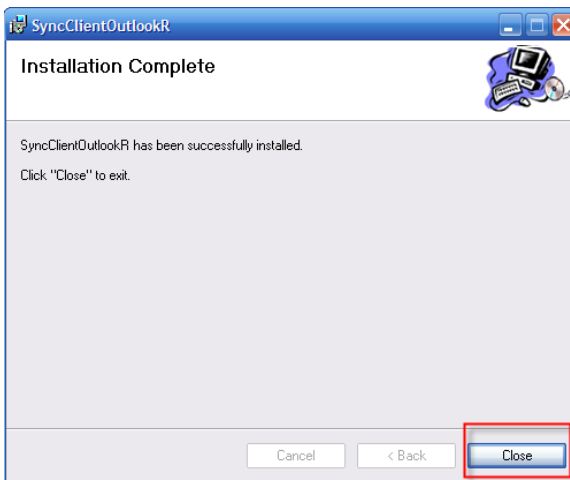
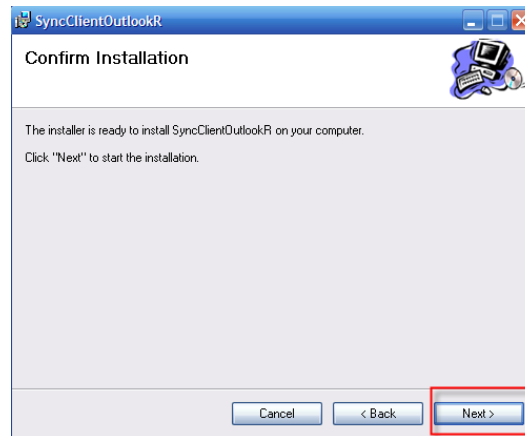
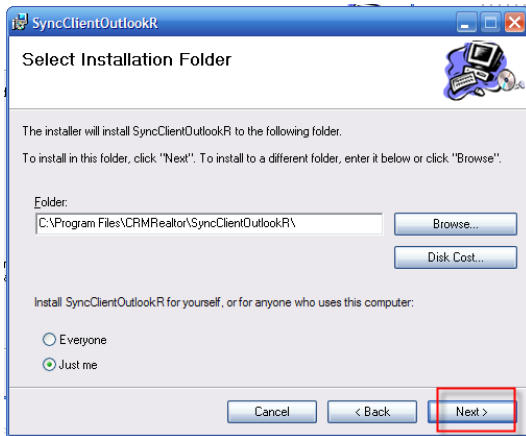
4. You will be asked to Save or Run. Either option will work just fine. Select RUN to save a few steps.



Installing the Sync Client

1.

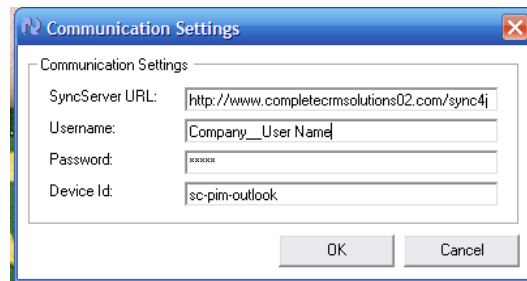




After the Installation is Complete, look for the Sync Client Icon on your desktop and Open by clicking the Icon.



1. The first time you Synchronize you will need to configure your settings under the Edit Menu. Thereafter, you can initiate the sync by clicking on the icon and then on the “Synchronize” button.



1. **The Sync Server URL:** should be set as indicated in the illustration below. If your company logs in to a server other than “CompleteCRMSolutions02.com” you will replace that part of the URL with your server URL. This is the proper setting if you log in to www.completecrmsolutions.com or www.crmrealtor.com.
2. **Username:** set the user name to be your company name + 2 underscores “_”+”_” and your Username with appropriate spaces in your username if they apply.
3. **Password:** Your login password

If you see the following warning from outlook, please allow access for 10 minutes. If you are synchronizing a large number of contacts you may see this pop up again. Allow access again if necessary.

