

If you purchased ExisXto, you should have received the product key from Exis LLC. **If you plan to use 30 day free trial period, please send an email to info@exisone.com to get a product key.** You can install the software without product key but, you will not be able to activate it.

The directions below will install and configure ExisXto. The remaining pages show the same procedure in step by step detail with pictures of screens.

- 1) Download ExisXto from <http://www.exisone.com/downloads.aspx> .
- 2) Open the folder for your version of Outlook.
- 3) Extract all files
- 4) Read README file
- 5) Simply run the setup program from the directory where you saved the extracted files.
- 6) ExisXto uses Microsoft Framework 3.5 SP1. Normally when you install the ExisXto plug in, if your computer does not have this version of framework installed, you will be prompted to download it from Microsoft website. Optionally, you may install the Framework by downloading it from Microsoft: <http://www.microsoft.com/downloads/details.aspx?FamilyId=333325FD-AE52-4E35-B531-508D977D32A6&displaylang=en>. Re-run the setup program.
- 7) During the installation you may be prompted to install some missing components of outlook, just follow all the prompts to accept agreements and install missing components.
- 8) ExisXto add-in to Outlook is now installed.
- 9) Start Outlook. Select xTuple Settings from xTuple drop down menu (Please note that the menu for outlook 2010 will appear in the "Add-Ins" tab).
- 10) Go through each tab and configure the add-in.
- 11) Activate ExisXto by registering the software.

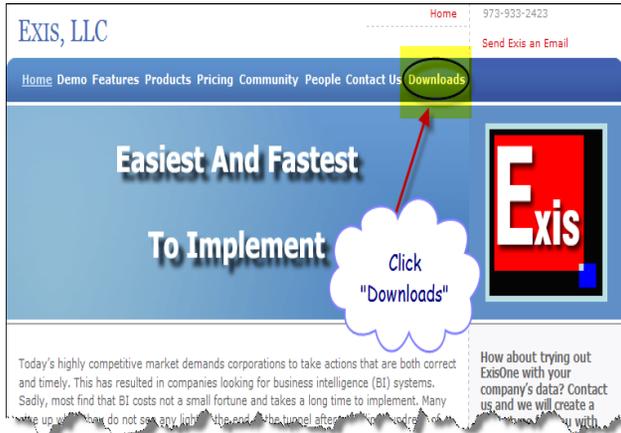


Figure 1

Go to <http://www.exisone.com> and click on downloads menu.



Figure 2

Select "Download ExisXto vX.X"

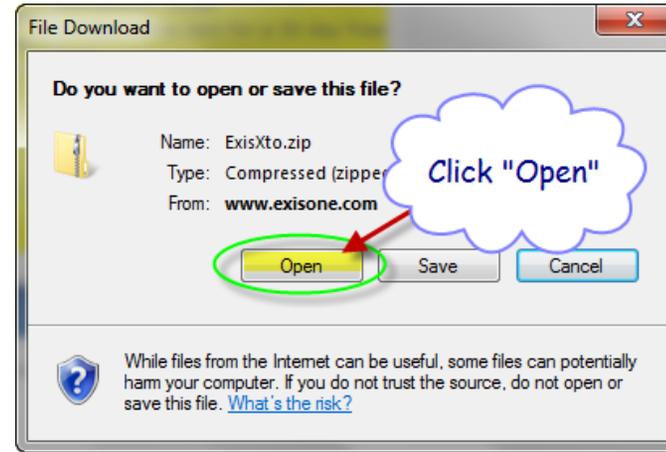


Figure 3

Click "Open" button to start downloading.

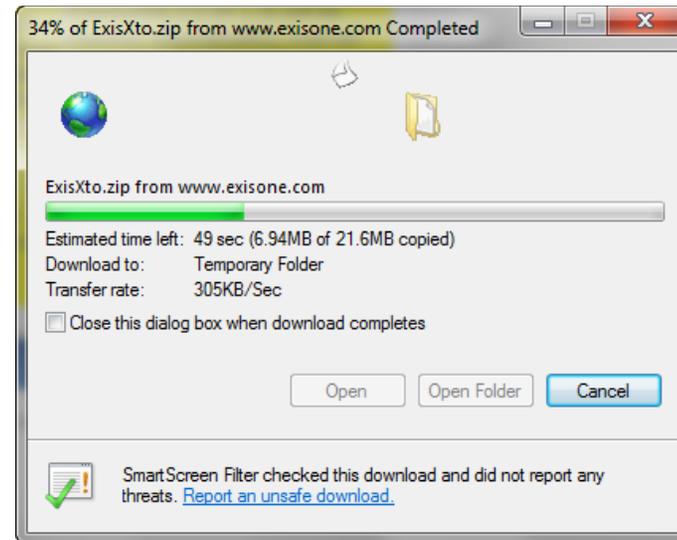


Figure 4

Downloading starts and you should see the progress bar. Follow the prompts to "Allow" for the download to proceed. If download does not start, please check your internet connection.

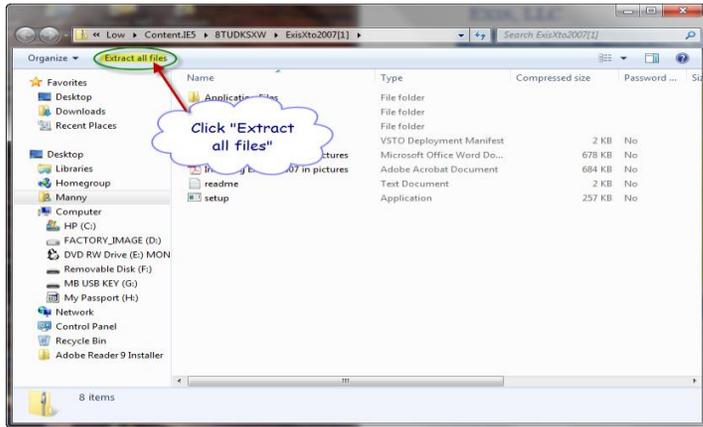


Figure 5

The download is a compressed file. Click “Extract all files” to decompress and stored the files on your computer.



Figure 7

Again, if ExisXto was previously installed, you will need to replace existing folders. Check box “Do this for all current items” and click “Yes” button.

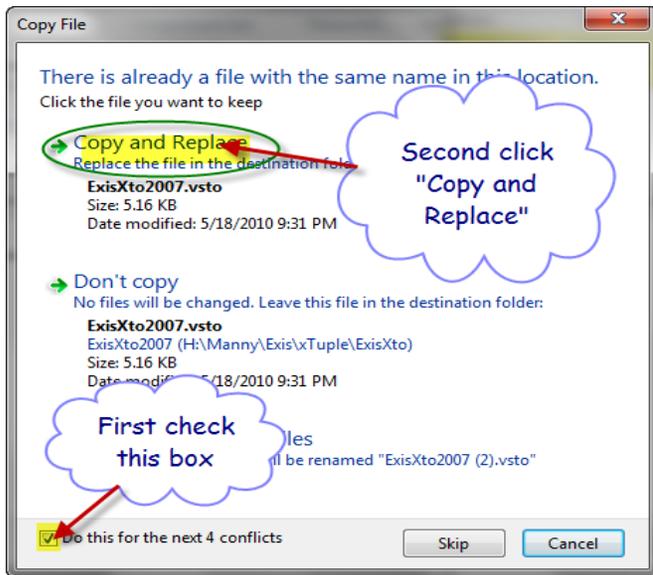


Figure 6

If ExisXto was previously installed, you will need to replace the old files. Check box “Do this for all current items” and click “Copy and Replace”

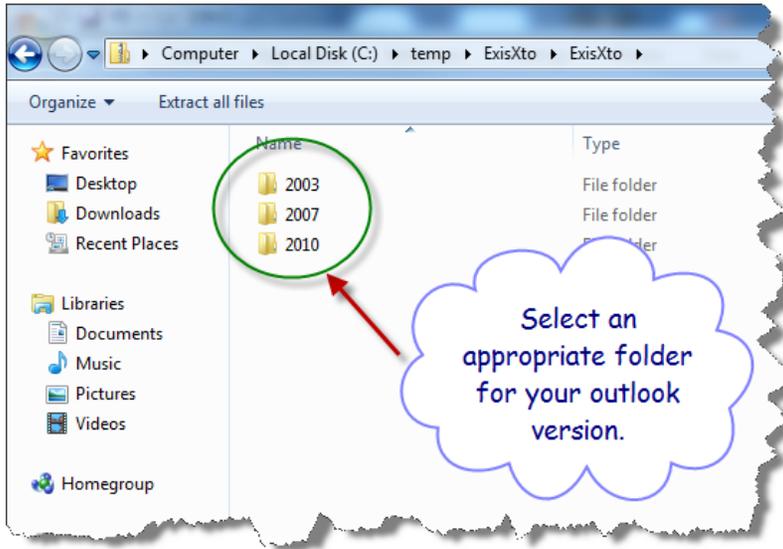


Figure 8

If you are using Outlook 2003, select "2003". If you are using Outlook 2007 select "2007". If you are using outlook 2010 select "2010"

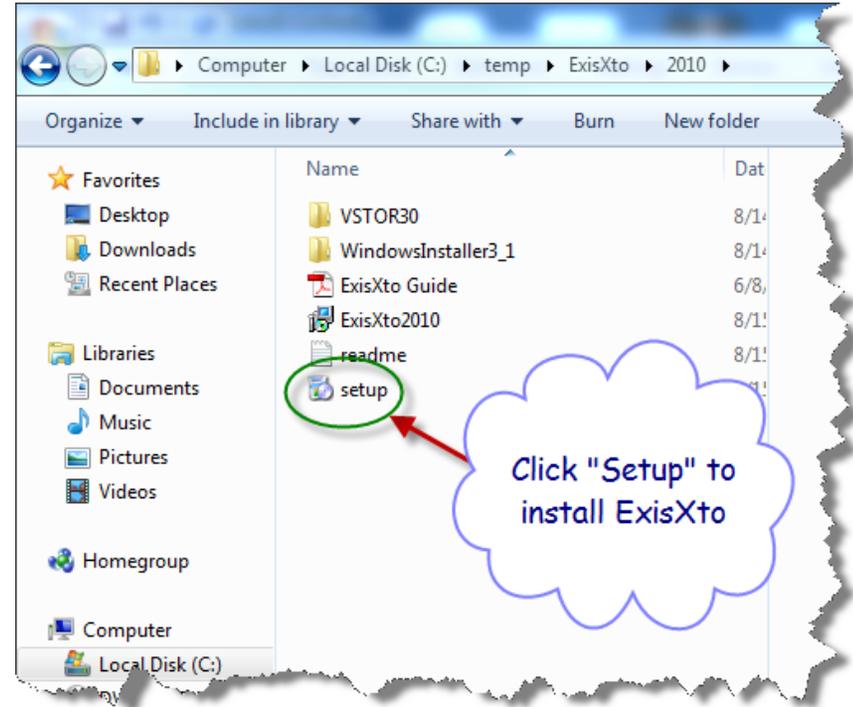


Figure 9

If box in figure 5 was checked, you will see the extracted files. If the box was not checked, you will have to navigate to the directory where the extracted files are stored. Run "Setup" application to create xTuple add-in to Outlook installed on your computer. Follow all prompts to install any missing components.

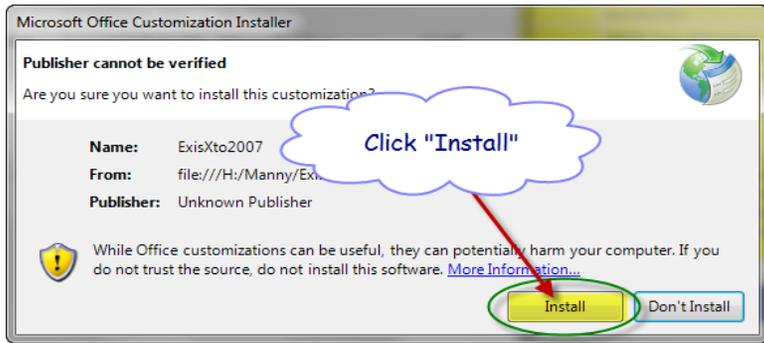


Figure 10

If you see the above, click "Install" button.

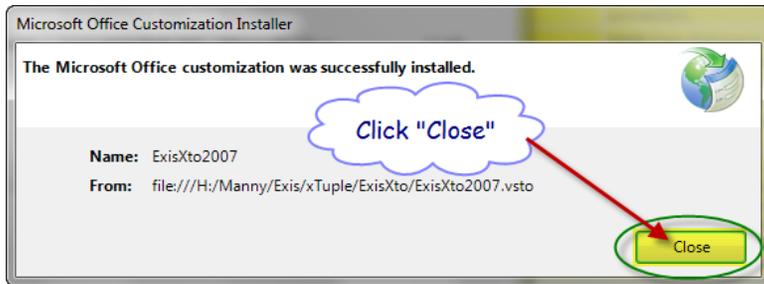


Figure 11

Installation should take only a few seconds and, you should see the above message. If you do not get this message, installation has failed. Please review all steps. You may have to repeat the installation process.

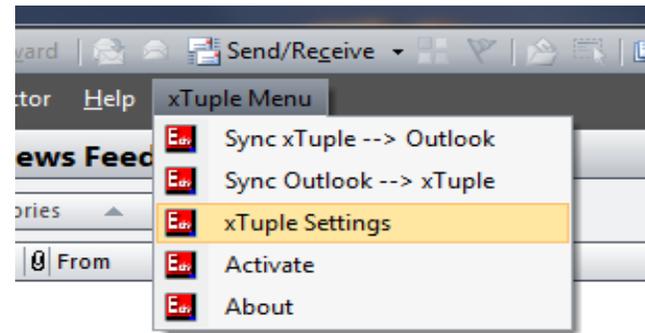


Figure 12

After successful installation, start Outlook. If Outlook was already open, close it and restart it. You should see xTuple Menu. Select "xTuple Settings" from the drop down list.

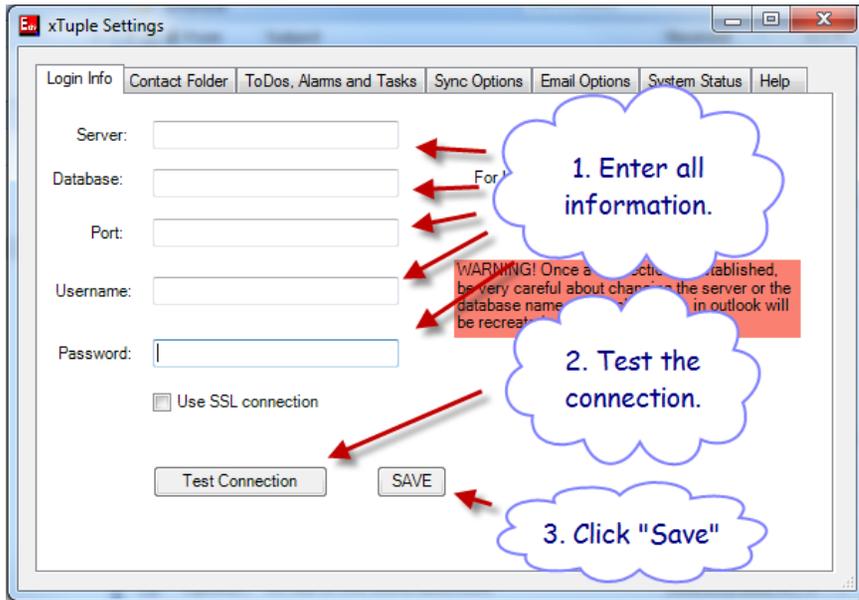


Figure 13

If "Login Info" tab is not open, select "Login Info" tab. This is the information ExisXto uses to login to xTuple. If you do not know any of the required information, contact your xTuple administrator. It is essentially the same as your xTuple client settings. When done, test connection to verify that you have entered correct data. If the data is correct you will see "Success" message. If connection fails, one or more of the login info data is incorrect.

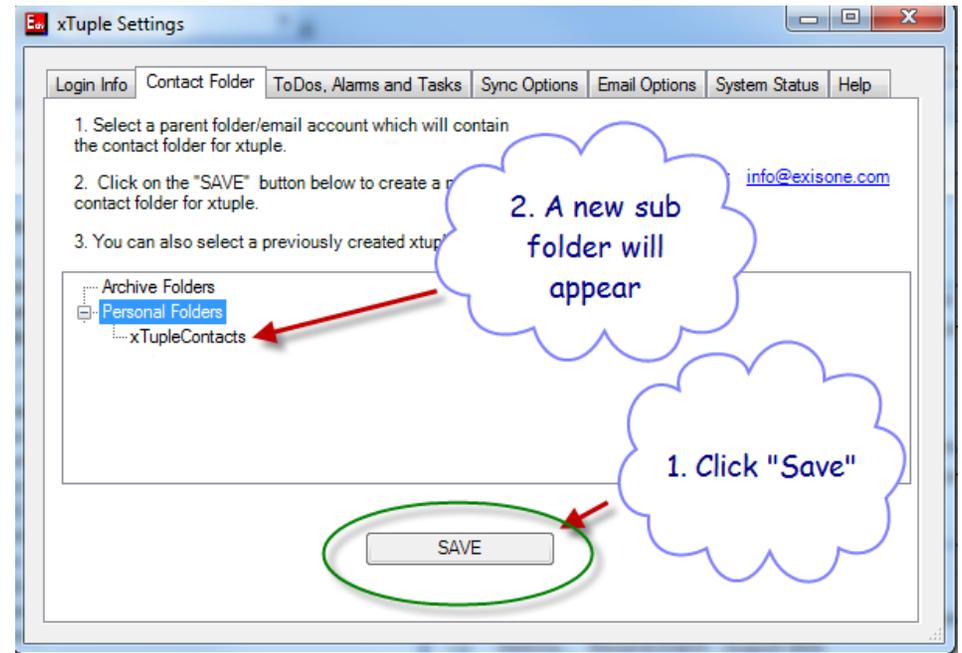


Figure 14

Open "Contact Folder" tab. Select the appropriate email account that you will use with xTuple CRM. Typically this will be "Personal Folders". IMAP folders (e.g. gmail) cannot be used, in that case use "Personal Folders". Click "SAVE" button. ExisXto will create "xTupleContacts" sub-folder. Note the new folder created in the picture above.

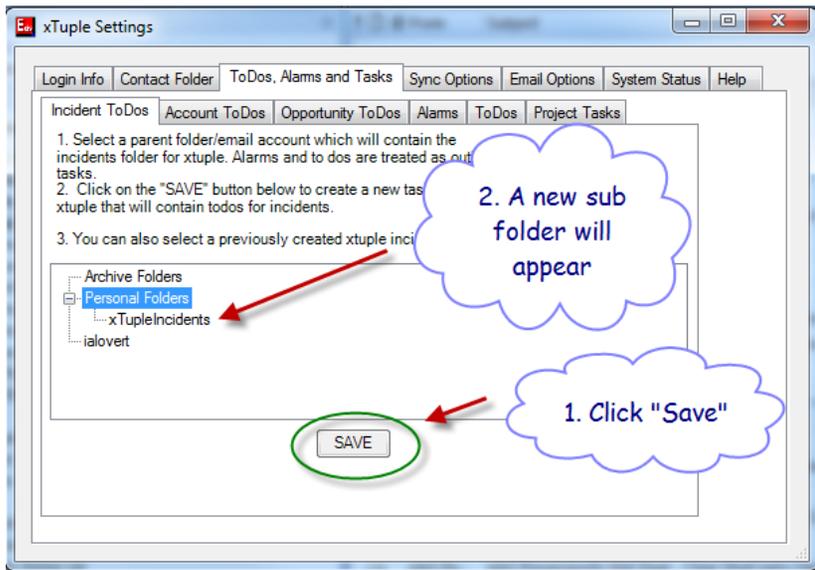


Figure 15

To synchronize to-dos and alarms perform the following for “Incident to-dos”, “Account to-dos”, “Opportunity to-dos”, “Alarms”, unrelated “To-Dos”, and “Project Tasks” do the following for each.

Open the appropriate tab. Select the appropriate email account that you will use with xTuple CRM. Typically this will be “Personal Folders”. IMAP folders (e.g. gmail”) cannot be used, in that case use “Personal Folders”. Click “SAVE” button. ExisXto will create a sub-folder. Note the new folder “xTupleIncidents” created in the picture above.

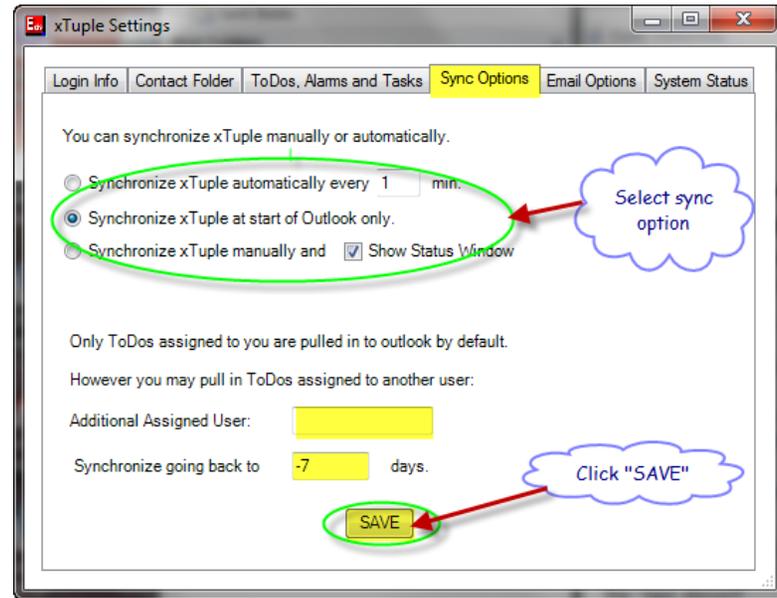


Figure 16

You have three choices of how you synchronize with Outlook. 1) Automatically synchronize based on a time interval you specify, 2) synchronize only at start of Outlook, and 3) manually synchronize with xTuple. In the first 2 cases, data from Outlook is sent to xTuple first followed by data from xTuple to Outlook.

If you select manual synchronization, you control synchronization through xTuple menu.

Skip the last tab “System Status” .

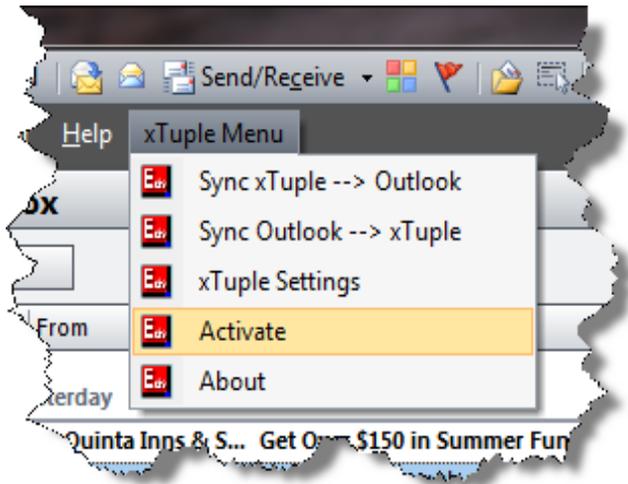


Figure 17

Before you can use ExisXto, you must activate it. This is required only once. Select "Activate" from xTuple Menu drop down.

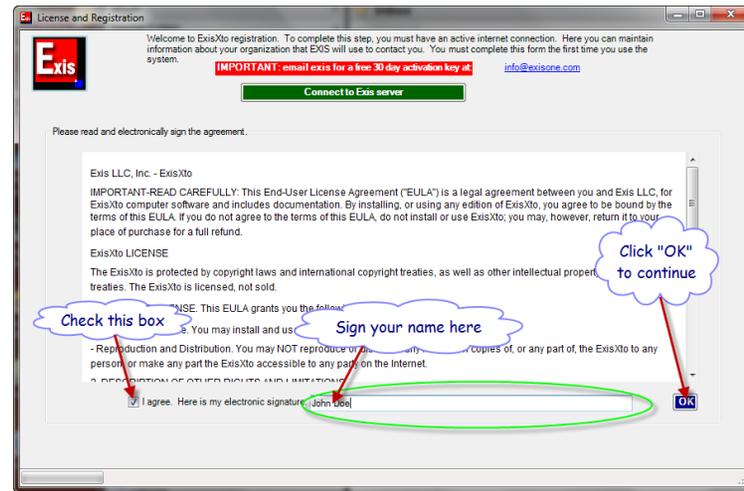


Figure 19

Read the agreement, check the box, and sign your name to indicate that you agree with the terms. Click "OK" button to continue.

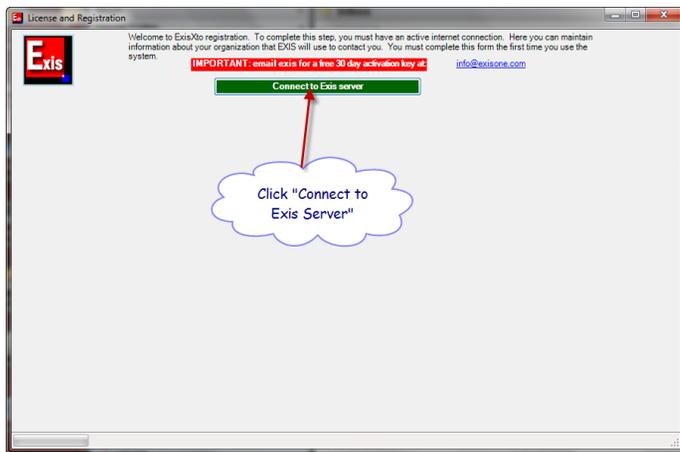


Figure 18

Activation requires that your computer must be connected to internet to access Exis Server. Click "Connect to Exis Server" button.

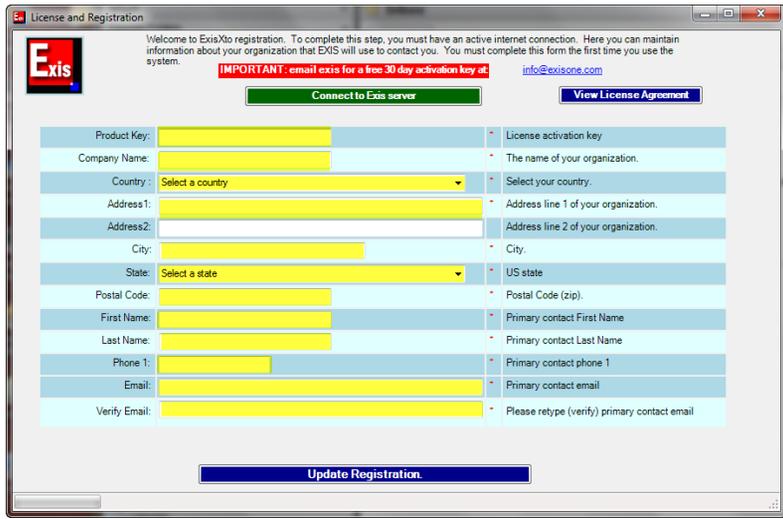


Figure 20

Enter your product key and contact information. If you do not have a product key, send an email to info@exisone.com requesting product key for free 30 days trial. When done, click "Update Registration" bar.

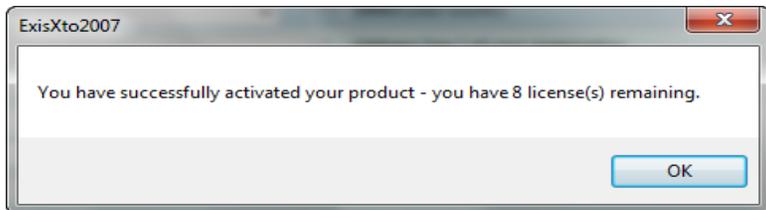


Figure 21

You should see a message similar to above.

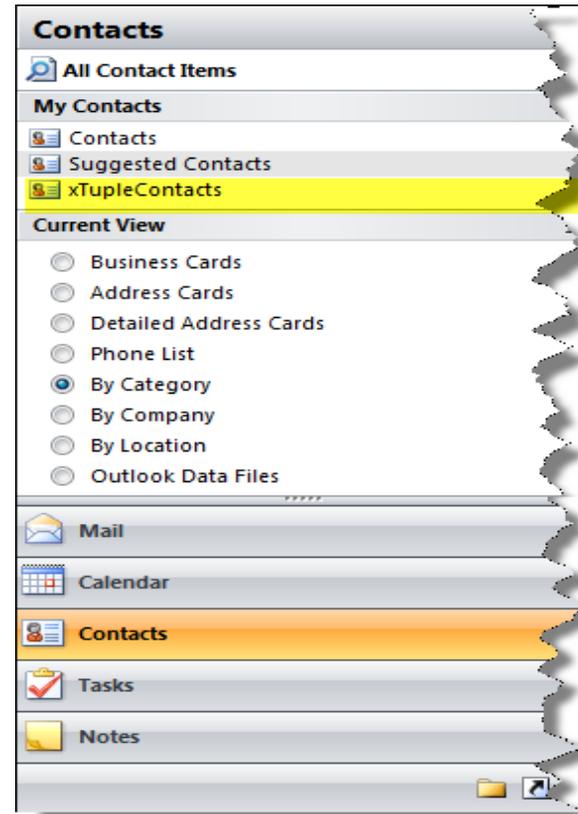


Figure 22

Select "Contacts". You should see folder "xTupleContacts".

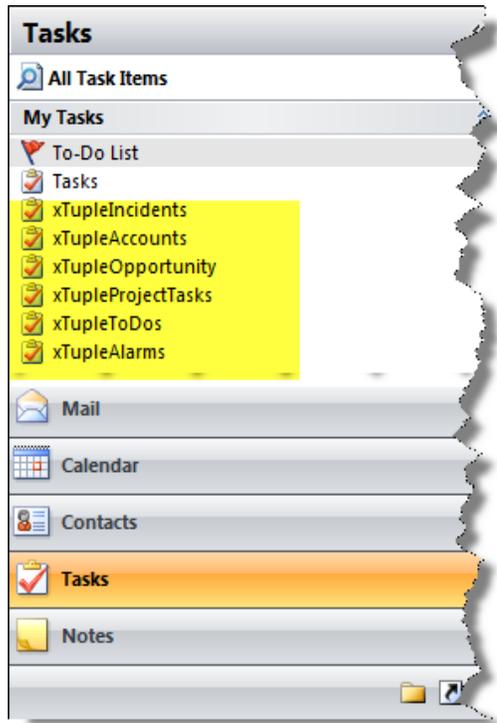


Figure 23

Select "Tasks". You should see xtuple folders for incidents, accounts, opportunity, project tasks, unrelated to-dos and alarms. If any is missing, most likely cause is that you did not click the "SAVE". Repeat instructions for the appropriate tab (figure 5)

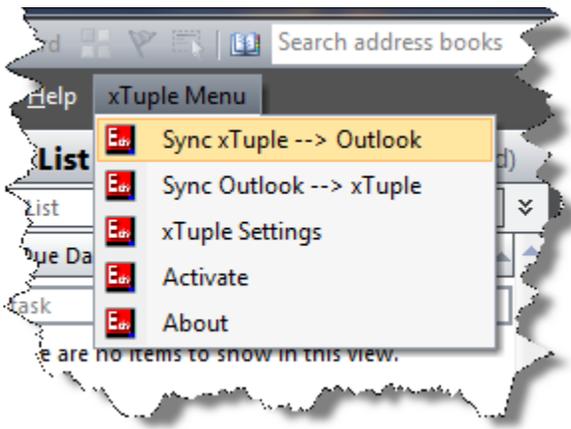


Figure 24

Select Sync xTuple → Outlook from xTuple menu drop down to download data from xTuple to Outlook.

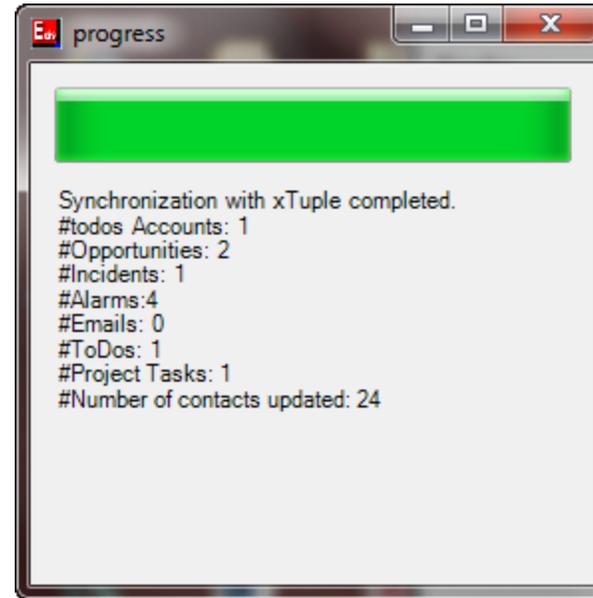


Figure 25

The progress display will show you as the download progresses.

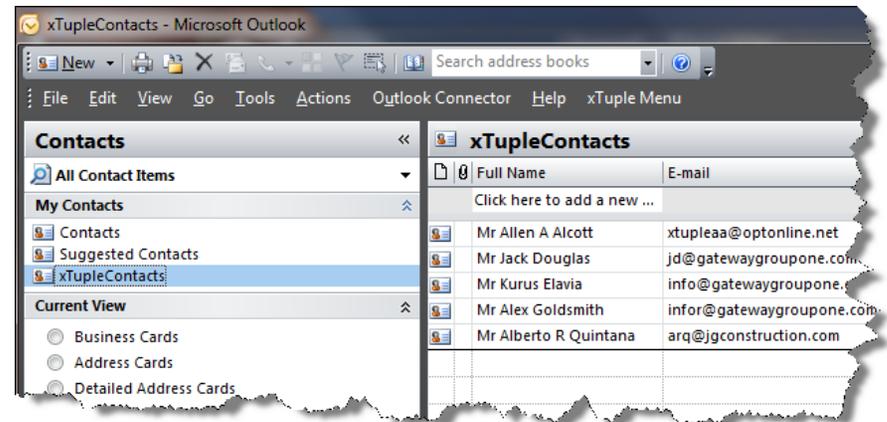


Figure 26

This figure shows the list of xTuple contacts downloaded in to xTupleContacts folder

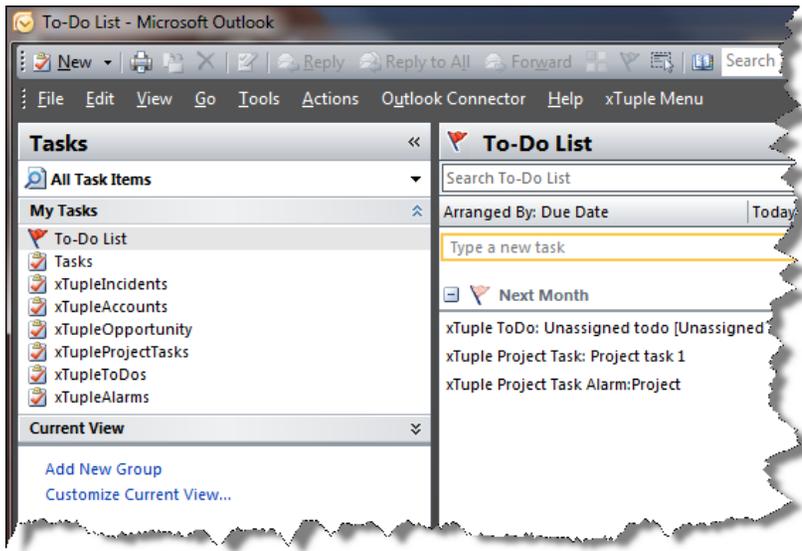


Figure 27

The to-do list downloaded from xTuple.

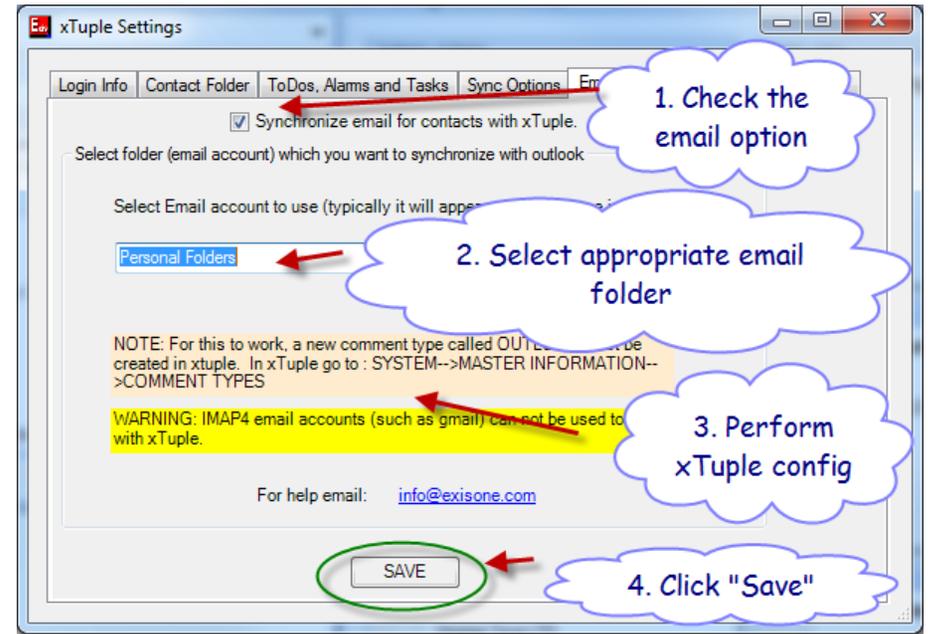


Figure 28

ExisXto now allows you to synchronize emails that you send to the xTuple contacts by uploading them to xTuple database. The following steps are necessary:

1. In the "Email Settings" option click on the checkbox to synchronize email accounts.
2. Select an appropriate email account for this synchronization. Note that IMAP accounts **cannot** be used here for this feature to work.
3. Perform the necessary setup step in the xTuple system by logging into your xTuple client, going to SYSTEM-->MASTER INFORMATION-->COMMENT TYPES and creating a new comment type called "OUTLOOK".
4. Click "SAVE".

Now every time you send an email where one of the recipients is an email that matches a contact in xTuple, it will be uploaded to the xTuple database.

