



**tax**WorkFlow

# **Outlook 2013 settings for workflow.rocks email server**

February, 2016

For all questions regarding this document, please email [support@thetaxworkflow.com](mailto:support@thetaxworkflow.com)

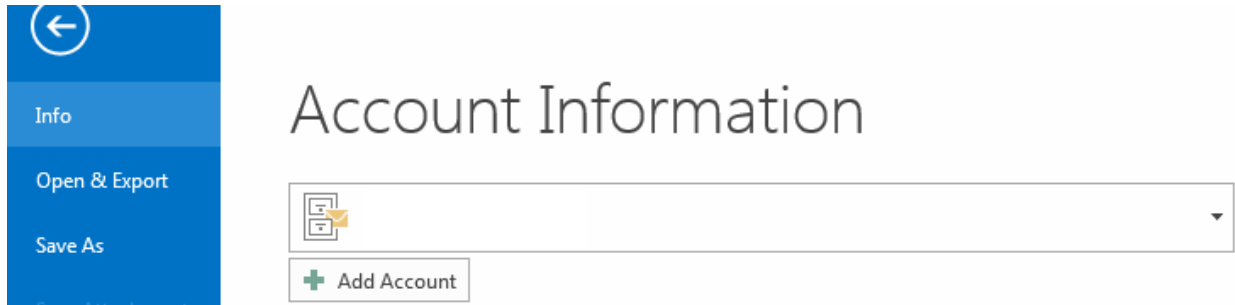
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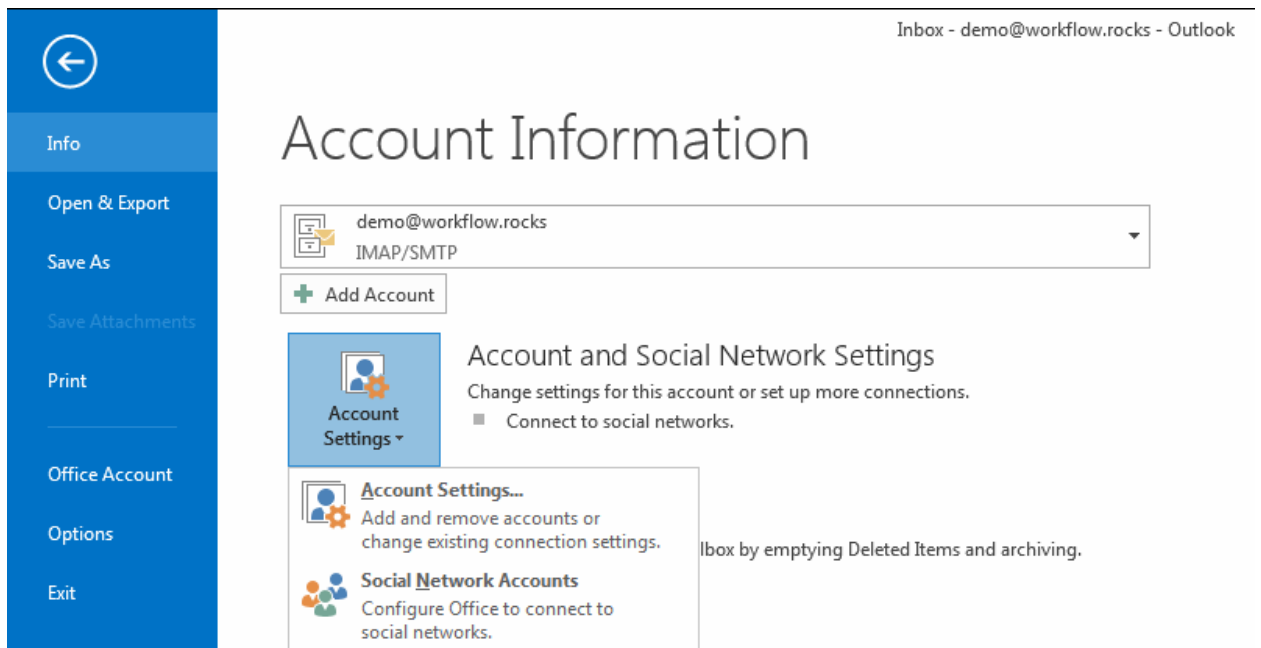
## Set up your email account

Outlook 2013 can successfully work with your workflow.rocks email account. Network Calendar and Address Book are also available in this version of the application.

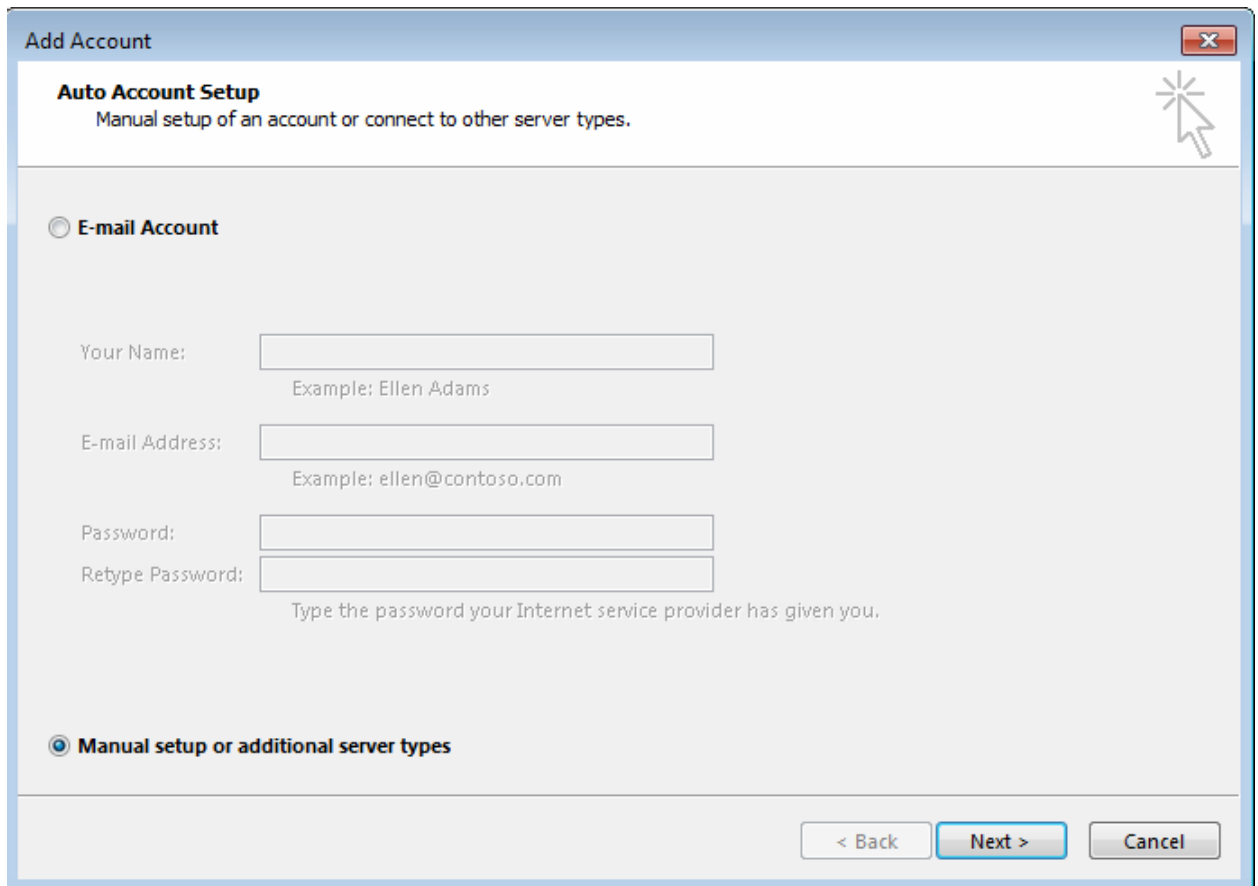
To setup your email box in Outlook 2013 you need to create a new Email account first. Go to “File >> Info...” and click “Add Account”:



If you already setup your account and want to check your settings you need to click “Account Settings...”. In the new window select account you need to check and press “Change...” button.

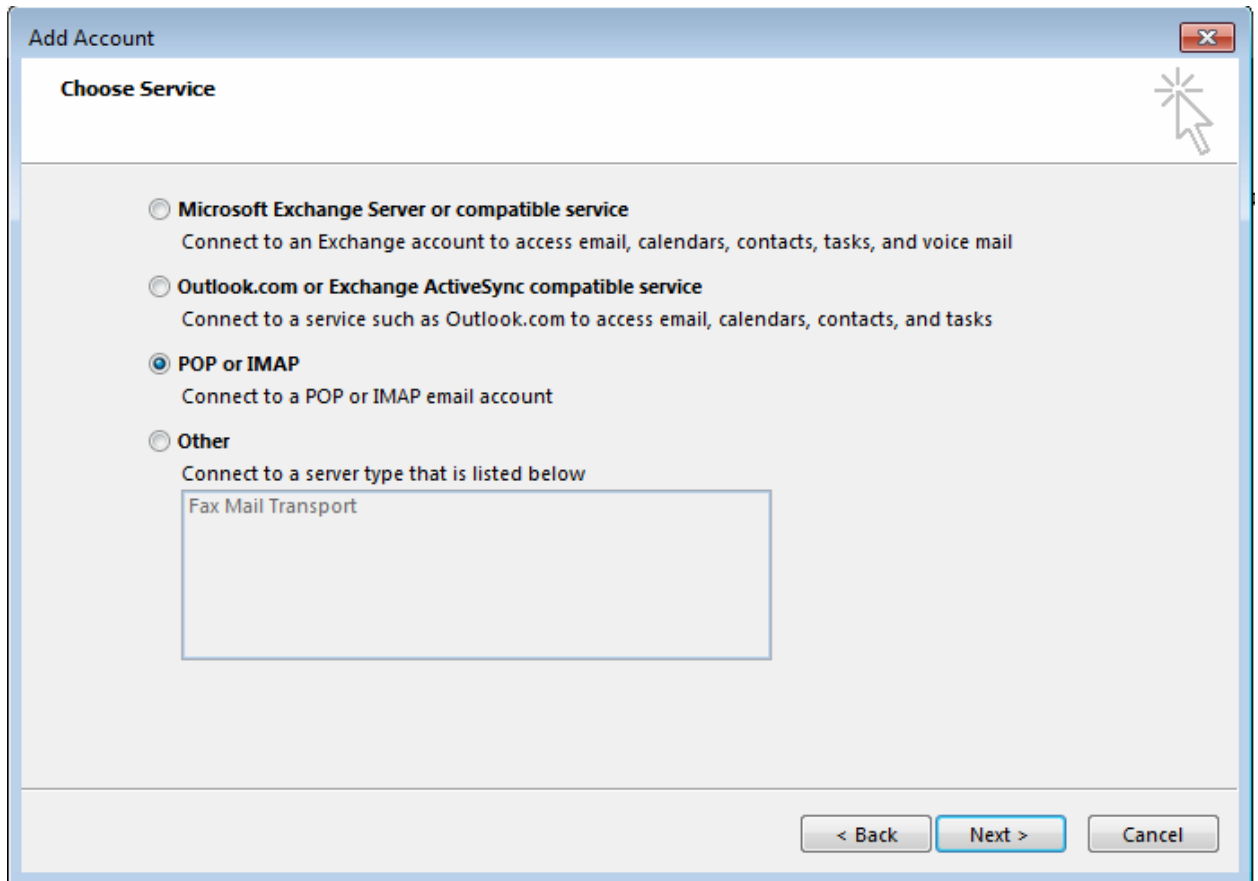


There is no need to fill in anything in the next window. Just select “Manually setup or additional server types” radio button and press “Next”:



The screenshot shows the 'Add Account' dialog box in Outlook 2013. The window title is 'Add Account' with a close button (X) in the top right corner. Below the title bar, there is a section titled 'Auto Account Setup' with a sub-header 'Manual setup of an account or connect to other server types.' and a mouse cursor icon pointing to the right. There are two radio button options: 'E-mail Account' (which is currently unselected) and 'Manual setup or additional server types' (which is selected). Under 'E-mail Account', there are four input fields: 'Your Name:' with an example 'Ellen Adams', 'E-mail Address:' with an example 'ellen@contoso.com', 'Password:', and 'Retype Password:' with a note 'Type the password your Internet service provider has given you.' At the bottom right, there are three buttons: '< Back', 'Next >' (highlighted in blue), and 'Cancel'.

In the new window select “POP or IMAP” and press “Next” button:

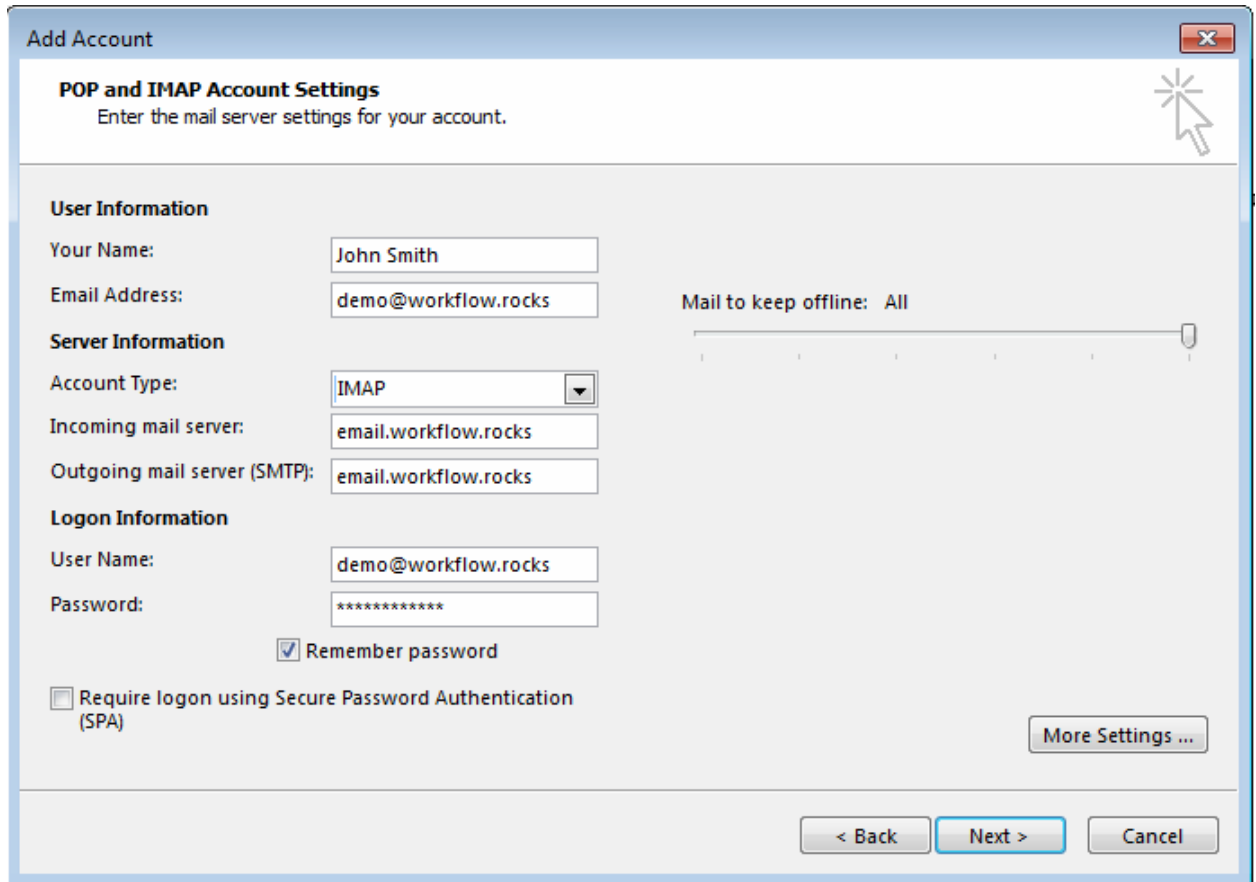


Fill in all your settings in the new window. Select IMAP account type.

Your incoming mail server address is: **email.workflow.rocks**

Outgoing mail server (SMTP) is the same: **email.workflow.rocks**

Please note that your User Name must match your full email address:

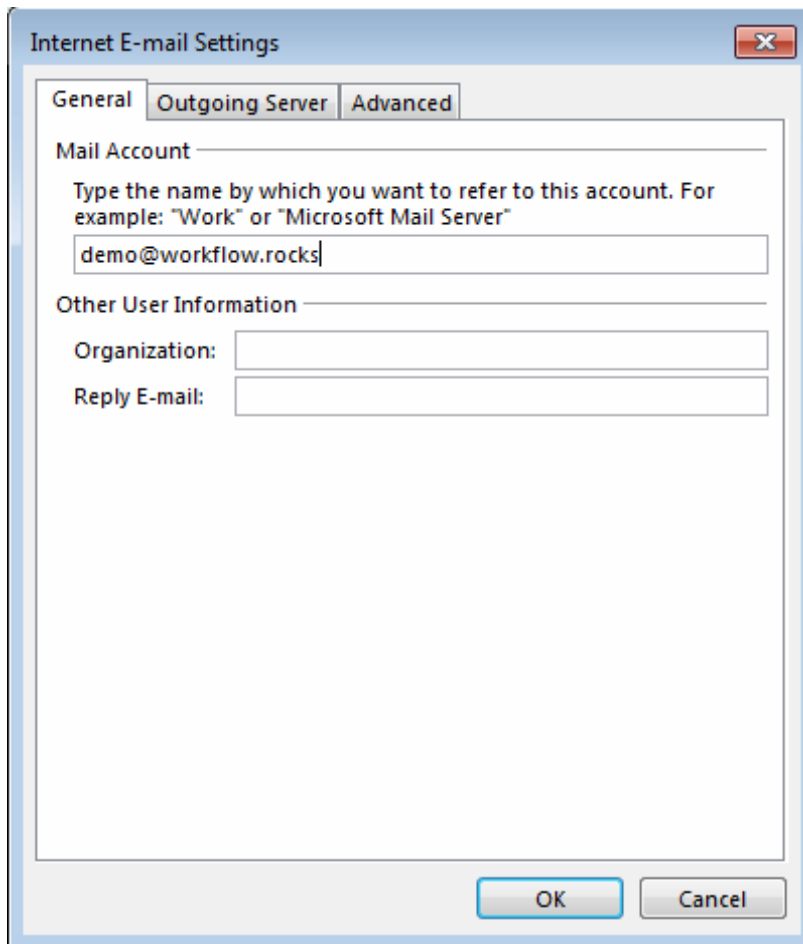


The screenshot shows the 'Add Account' dialog box in Outlook 2013, titled 'POP and IMAP Account Settings'. The dialog is used to configure email accounts. It contains the following fields and options:

- User Information:**
  - Your Name: John Smith
  - Email Address: demo@workflow.rocks
- Server Information:**
  - Account Type: IMAP (selected in a dropdown menu)
  - Incoming mail server: email.workflow.rocks
  - Outgoing mail server (SMTP): email.workflow.rocks
- Logon Information:**
  - User Name: demo@workflow.rocks
  - Password: \*\*\*\*\*
  - Remember password
  - Require logon using Secure Password Authentication (SPA)

Additional features include a 'Mail to keep offline' slider set to 'All', a 'More Settings ...' button, and navigation buttons at the bottom: '< Back', 'Next >', and 'Cancel'.

After all fields are filled click on “More Settings ...” button. In the new window enter the name of the mail account and other user information if necessary:



Internet E-mail Settings

General | **Outgoing Server** | Advanced

Mail Account \_\_\_\_\_

Type the name by which you want to refer to this account. For example: "Work" or "Microsoft Mail Server"

demo@workflow.rocks

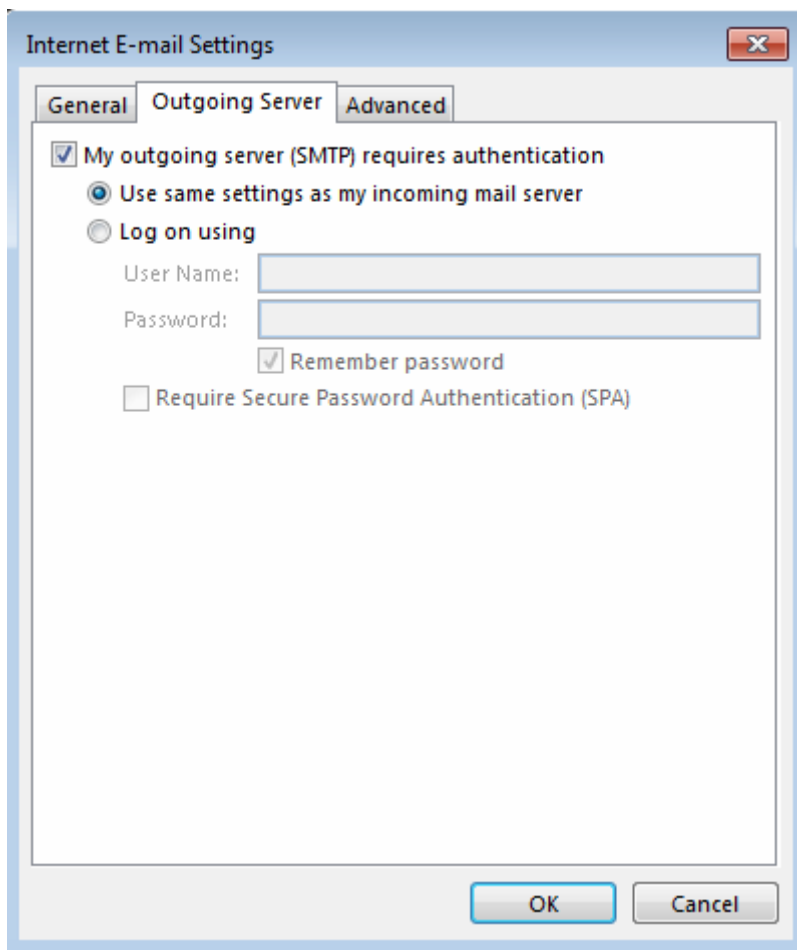
Other User Information \_\_\_\_\_

Organization: \_\_\_\_\_

Reply E-mail: \_\_\_\_\_

OK Cancel

Open “Outgoing Server” tab and select the following settings:



The screenshot shows the "Internet E-mail Settings" dialog box with the "Outgoing Server" tab selected. The settings are as follows:

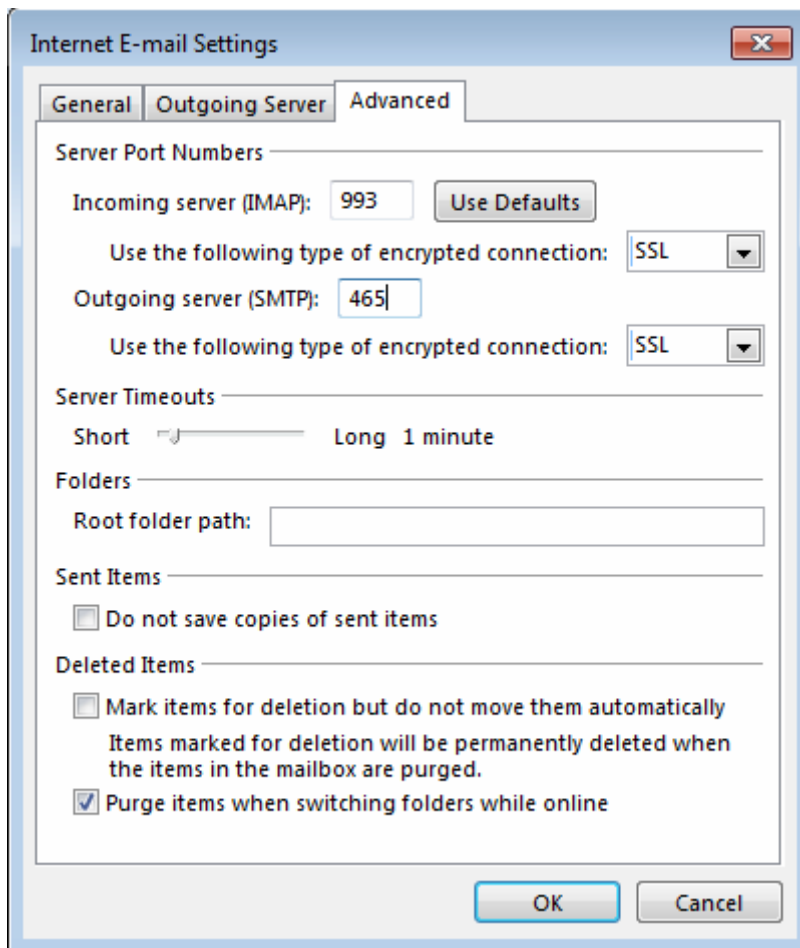
- My outgoing server (SMTP) requires authentication
  - Use same settings as my incoming mail server
  - Log on using
    - User Name:
    - Password:
    - Remember password
  - Require Secure Password Authentication (SPA)

Buttons: OK, Cancel

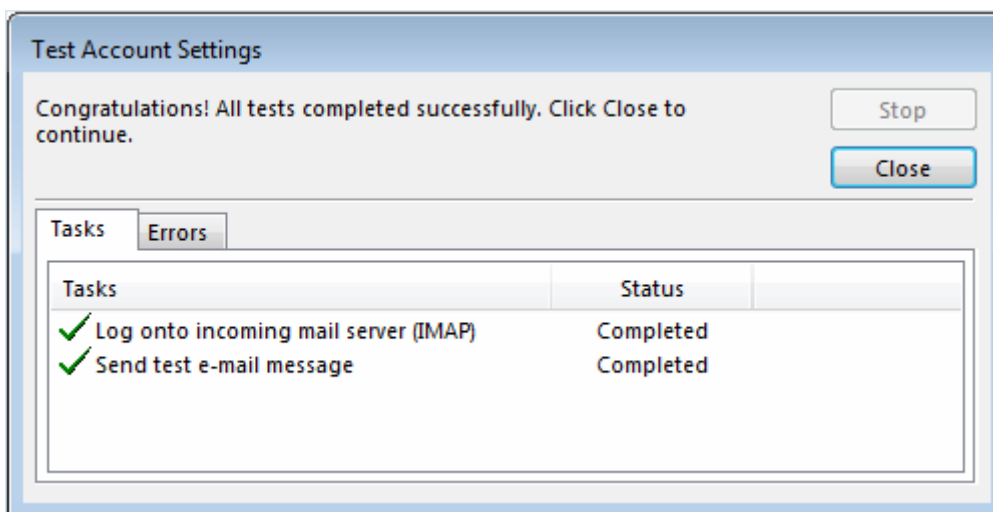


In “Advanced” tab from “Use the following type of encrypted connection:” drop-down list select “SSL” for incoming server (IMAP) and for outgoing server (SMTP), too.

Check server port numbers. It must be 993 for incoming server and 465 for outgoing server:

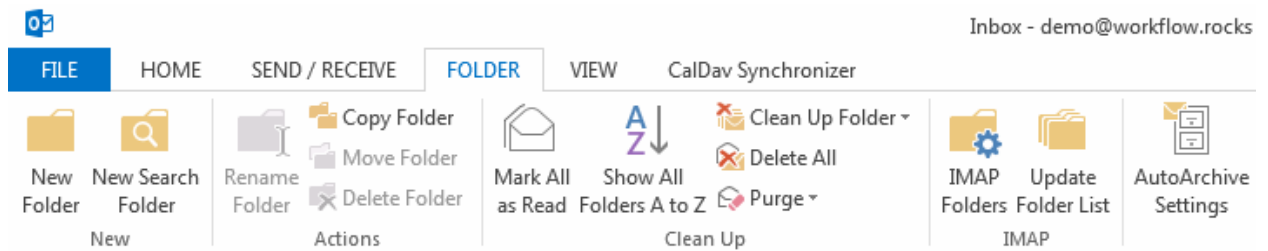


Click “OK” and then “Next” button. The application will automatically start to test your settings. If the test passed, you will see the following window:

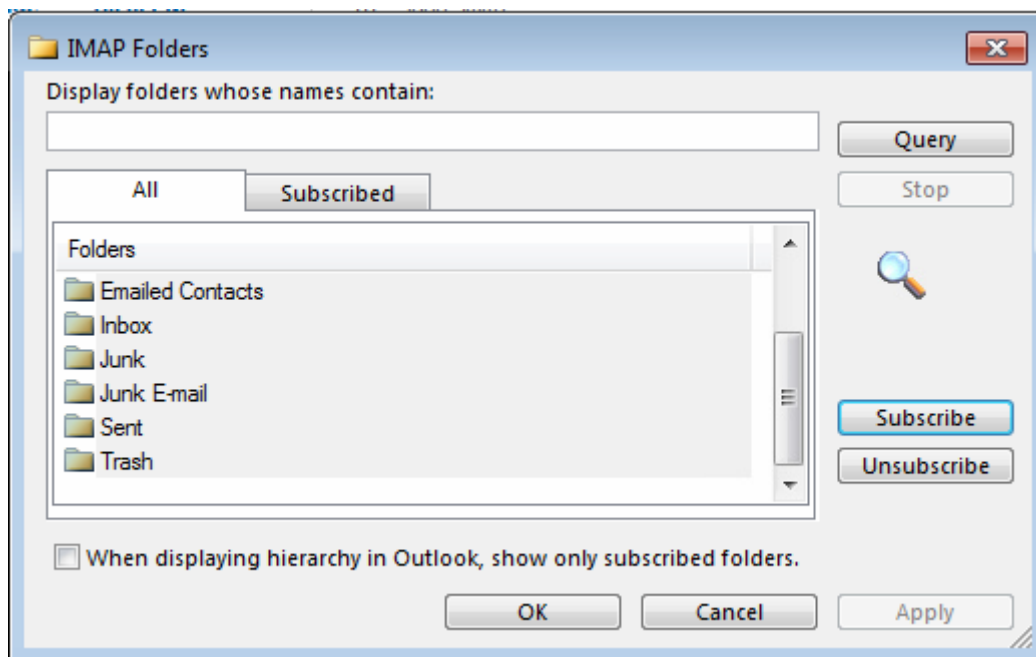


Close this window. Your account now is all set.

If you can't see all IMAP folders in your account go to "Folder >> IMAP Folders":



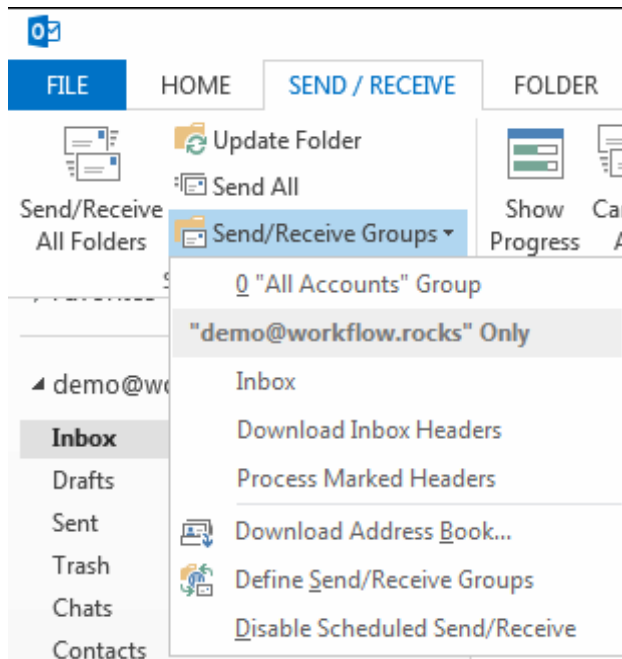
If there are no folders in the list of the "All" tab you need to click on "Query" button. Leave "Display folders whose names contain:" field blank and all folders will appear in the list:



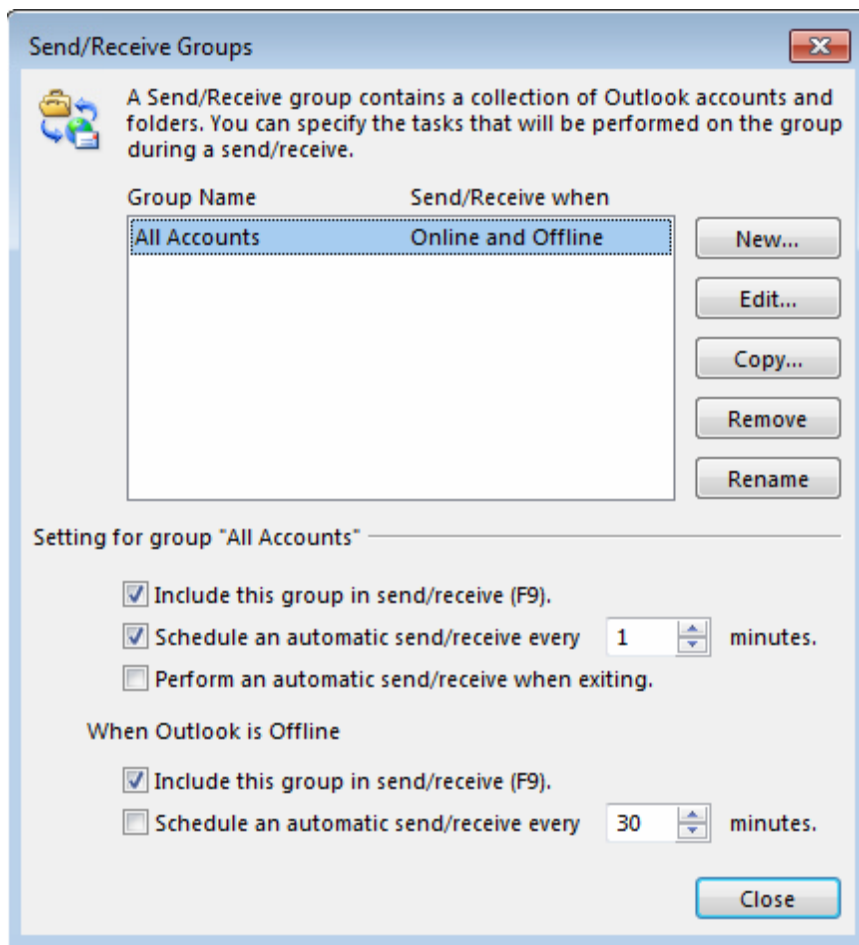
Select the folders you want to be displayed in Outlook and press "Subscribe". Then click "OK".

## Configure how Outlook receives your email

By default your Outlook may download only headers and it will always take a time to see a selected email. To make Outlook to download complete items including attachments go to “Send/Receive >> Send/Receive Groups >> Define Send/Receive Groups”:

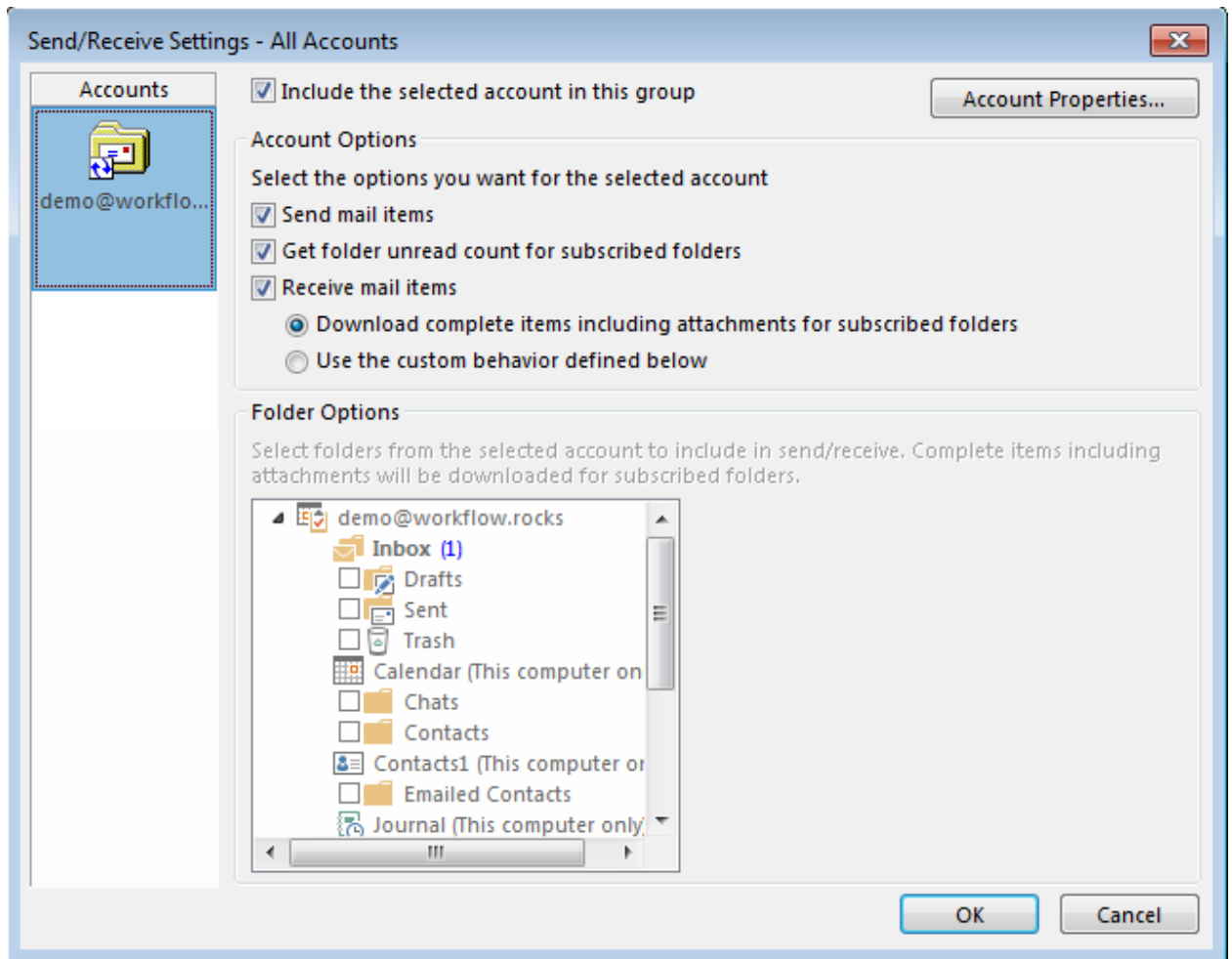


Now click “Edit...” button:




Also you can schedule an automatic send/receive interval in this window.

In the new window press “Download complete item including attachments for subscribed folders” radio button and press “OK”:



## Setup Calendar and Address Book

To access your calendar and address book you need to install Outlook CalDav Synchronizer. Open the following url: <http://sourceforge.net/projects/outlookcaldavsynchronizer/> and download an archive by clicking on the green “Download” button:



Home / Browse / Communications / Email / Outlook CalDav Synchronizer

# Outlook CalDav Synchronizer

Sync Outlook with Google, SOGo, Horde or any other CalDAV server  
Brought to you by: caldavsync, nertsch, nimm

Summary | Files | Reviews | Support | Wiki | Code | Tickets ▾ | Blog | Discussion | Donate

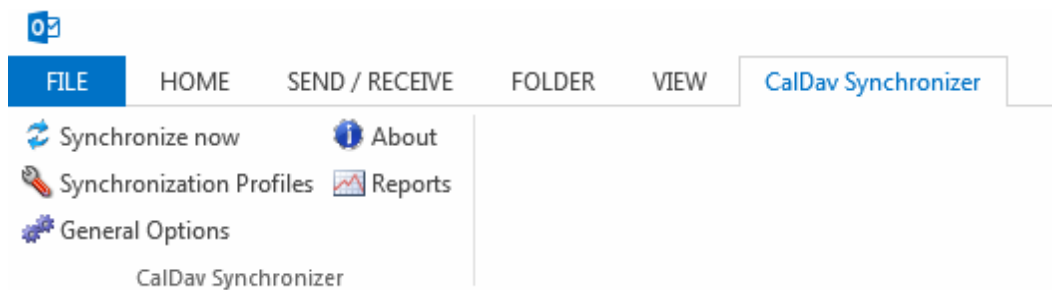
★ 4.9 Stars (35)  
↓ 6,747 Downloads (This Week)  
📅 Last Update: 2 days ago

Download  
OutlookCalDavSynchronizer-1.15.0.zip

Extract the OutlookCalDavSynchronizer-<Version>.zip into the same folder, close your Outlook application and start setup.exe.

If the installer is complaining about the missing Visual Studio 2010 Tools for Office Runtime, install it manually from Microsoft Download Link - <https://www.microsoft.com/en-us/download/details.aspx?id=48217>

When the add-on is installed, open Outlook and you will see a new set of buttons:

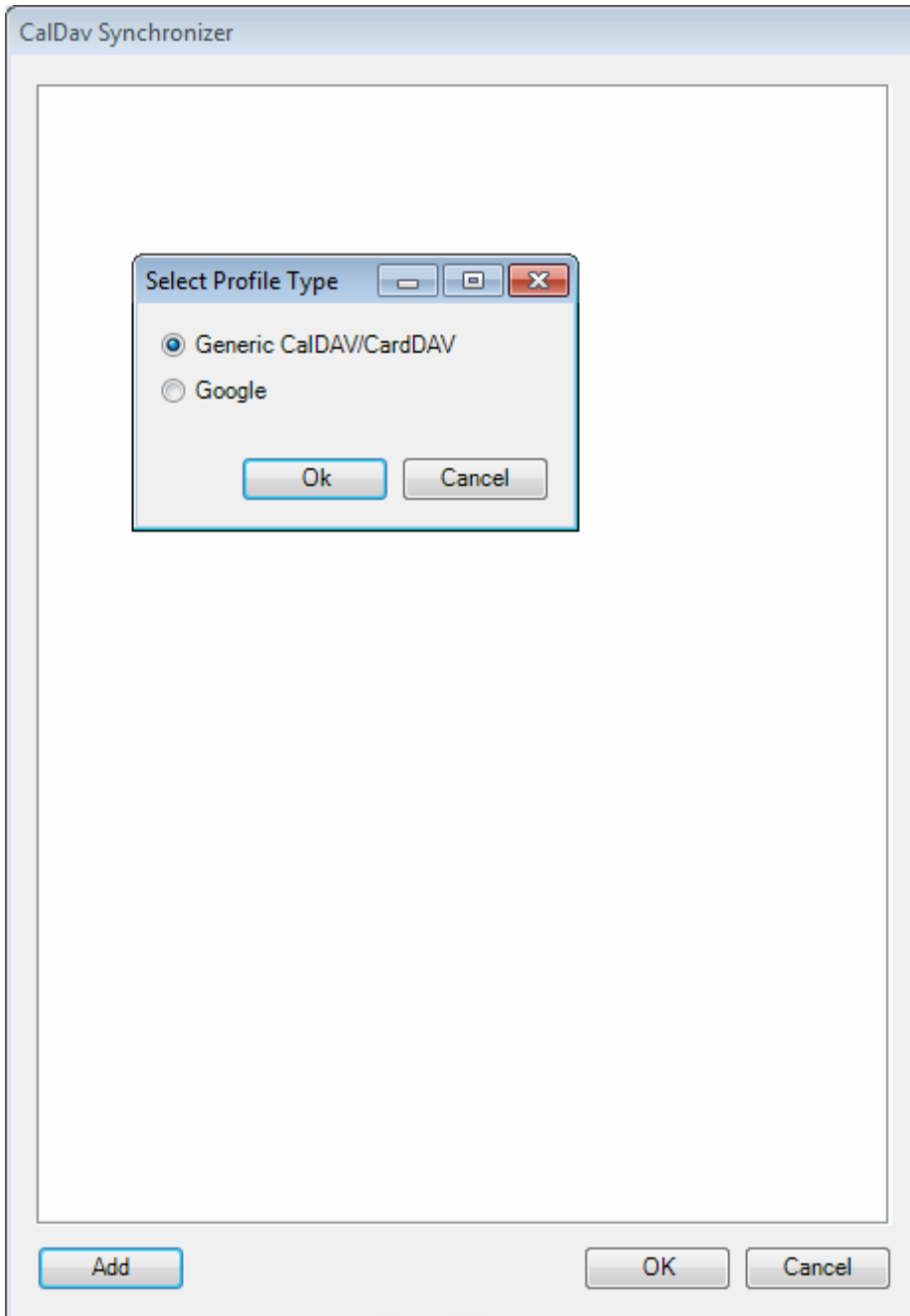


FILE HOME SEND / RECEIVE FOLDER VIEW CalDav Synchronizer

🔄 Synchronize now ⓘ About  
🔑 Synchronization Profiles 📊 Reports  
⚙️ General Options

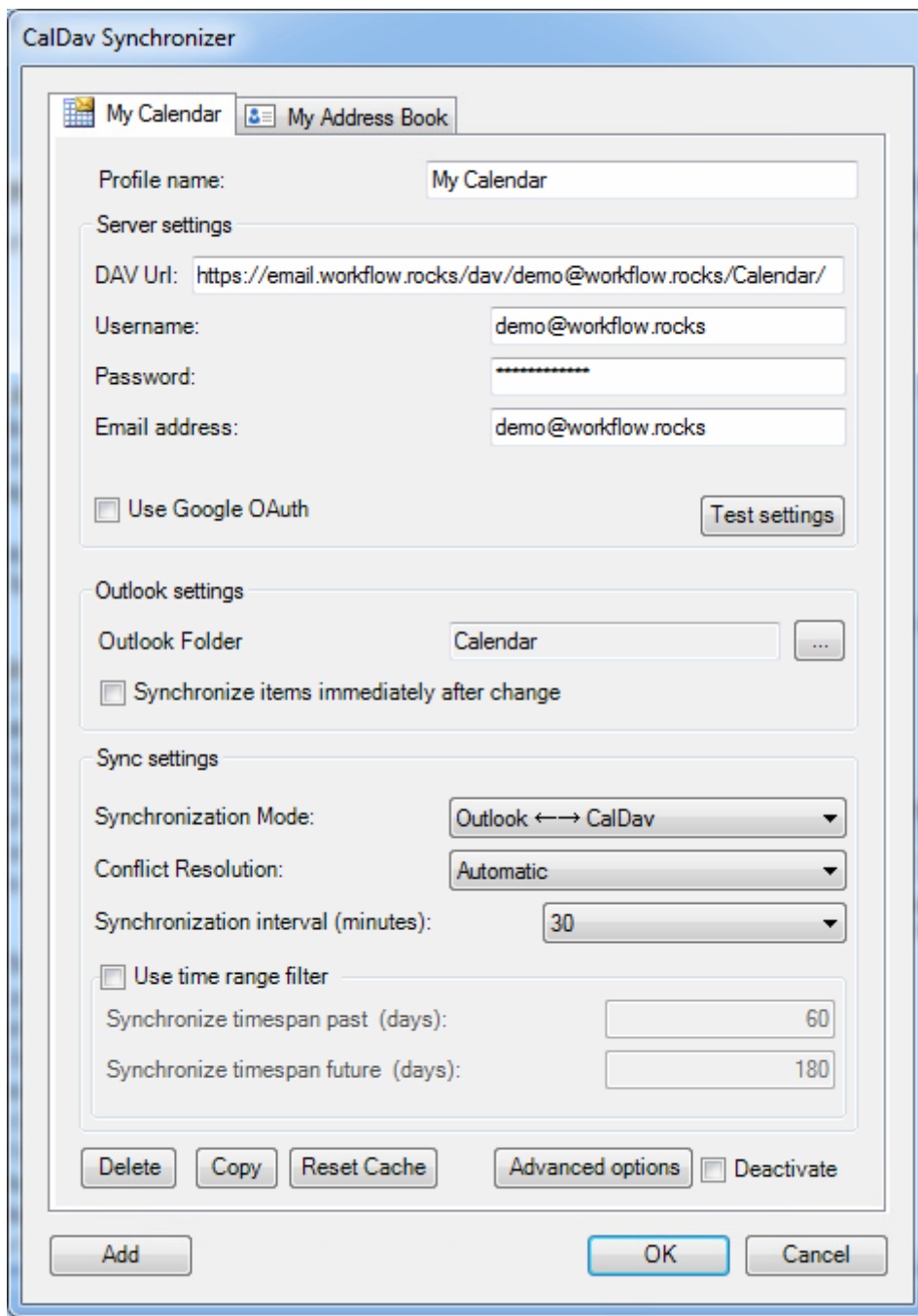
CalDav Synchronizer

Click on “Synchronization Profiles” button, click “Add” and select “Generic CalDAV/CardDAV” and press “OK”.





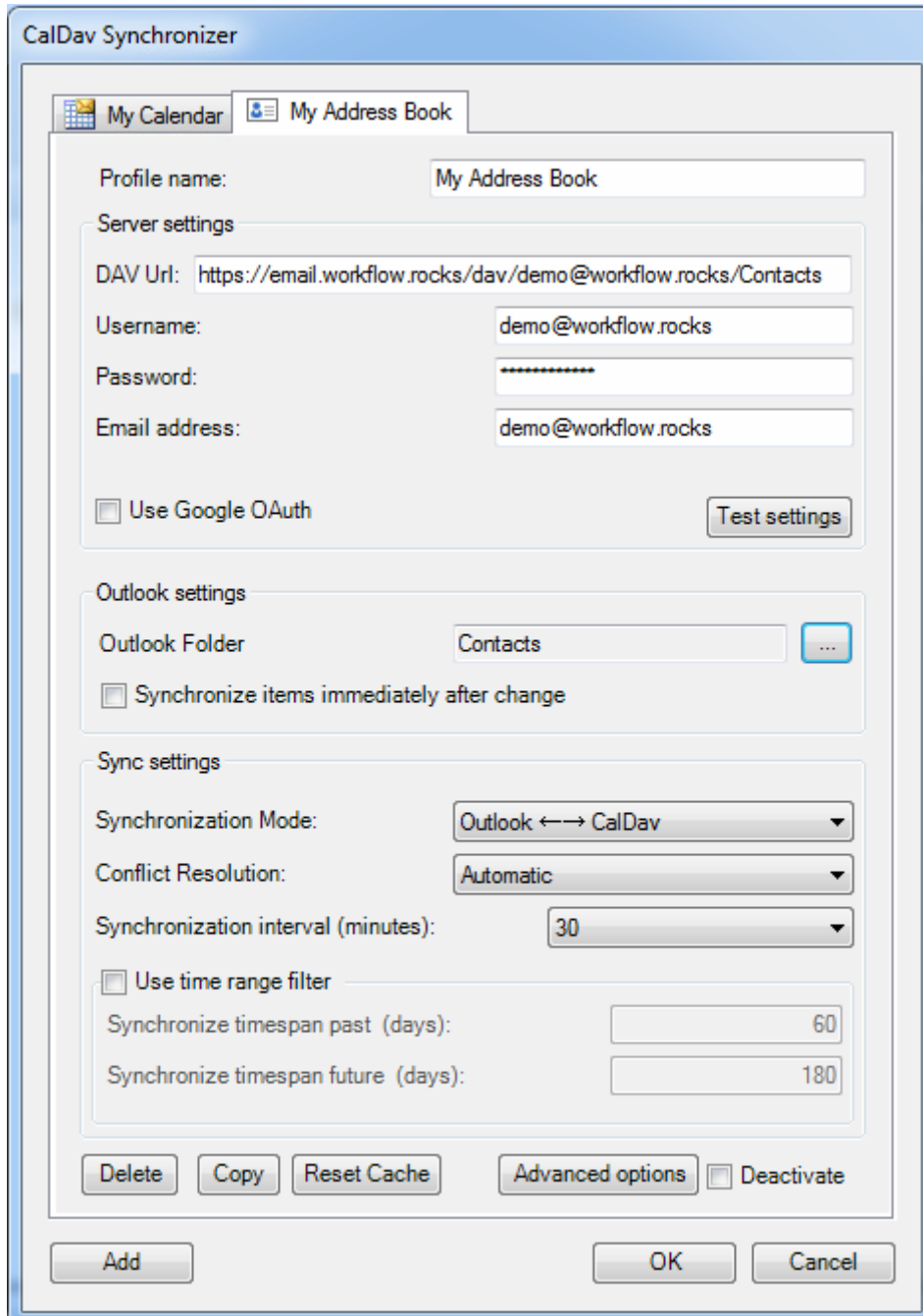
Below you can see an example of settings for calendar:



Please note that DAVurl is [https://email.workflow.rocks/dav/<your\\_email>/Calendar](https://email.workflow.rocks/dav/<your_email>/Calendar)

Username must match your email. Also, you need to select a folder for the calendar. It cannot be your IMAP folder so you need to select a folder from the list of local folders, eg. “Calendar” folder.

Setting up your network address book synchronization your DAVurl must look the following way: <https://email.workflow.rocks/dav/demo@workflow.rocks/Contacts>  
 Select a local folder, eg “Contacts”:



The screenshot shows the 'CalDav Synchronizer' dialog box with the 'My Address Book' tab selected. The configuration is as follows:

- Profile name:** My Address Book
- Server settings:**
  - DAV Url: <https://email.workflow.rocks/dav/demo@workflow.rocks/Contacts>
  - Username: demo@workflow.rocks
  - Password: [Redacted]
  - Email address: demo@workflow.rocks
  - Use Google OAuth
  - Test settings button
- Outlook settings:**
  - Outlook Folder: Contacts
  - Synchronize items immediately after change
- Sync settings:**
  - Synchronization Mode: Outlook ↔ CalDav
  - Conflict Resolution: Automatic
  - Synchronization interval (minutes): 30
  - Use time range filter
    - Synchronize timespan past (days): 60
    - Synchronize timespan future (days): 180

Buttons at the bottom include: Add, Delete, Copy, Reset Cache, Advanced options, Deactivate, OK, and Cancel.

Please note that contact synchronization doesn't support contact groups/distribution lists at the moment.