

Outlook 2010 settings for workflow.rocks email server

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For all questions regarding this document, please email support@thetaxworkflow.com



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Set up your email account

Outlook 2010 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 2010 you need to create a new Email account first. Go to "File >> Info..." and click "Add Account":



There is no need to fill in anything in the next window. Just check "Manually configure server settings or additional server types" checkbox and press "Next":

Add New Account		×
Auto Account Setur Connect to other s	o server types.	ž
© E-mail Account		
Your Name;	Example: Ellen Adams	
E-mail Address;	Example: ellen@contoso.com	
Password:		
Retype Password:		
	Type the password your Internet service provider has given you,	
 Text Messaging (Manually configure 	SMS) re server settings or additional server types	
	< Back Next >	Cancel



In the new window select "Internet E-mail" and press "Next" button:

Add New Account	×
Choose Service	×
 Internet E-mail Connect to POP or IMAP server to send and receive e-mail messages. Microsoft Exchange or compatible service Connect and access e-mail messages, calendar, contacts, faxes and voice mail messages. Text Messaging (SMS) Connect to a mobile messaging service. 	
< Back N	lext > Cancel



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:

Each of these settings ar	re required to get your e-mail acco	unt working.
User Information		Test Account Settings
Your Name:	John Smith	After filling out the information on this screen, we
E-mail Address:	demo@workflow.rocks	below. (Requires network connection)
Server Information		
Account Type:	IMAP 🚽	Test Account Settings
Incoming mail server:	email.workflow.rocks	Test Account Settings by clicking the Next button
Outgoing mail server (SMTP):	email.workflow.rocks	
Logon Information		
User Name:	demo@workflow.rocks	
Password:	*****	
(Remember password	
Require logon using Secure	Password Authentication (SPA)	More Settings

If you already setup your account and want to check your settings you can open this window by going to "File >> Account Settings...". In the new window select account you need to check and press "Change..." button.



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						
Outgoing Server		Connection		Advance	d	
General		Sent Items		Deleted Items	;	
Mail Account						
Type the name by v example: "Work" or	/hich y "Micro	ou want to refer to soft Mail Server"	o this a	account. For		
demo@workflow.ro	cks					
Other User Informatio	n —					
Organization:						
Reply E-mail:						
			ОК	Ca	ncel	



In the "Sent Items" and "Deleted Items" tabs you can't change anything yet. Open "Outgoing Server" tab and select the following settings:

Int	Internet E-mail Settings						
	General		Sent Items		Deleted Items	1	
	Outgoing Server		Connection		Advanced	1	
	My outgoing serve	er (SMT	P) requires authen	ticatio	n		
	Ose same sett	ings as	my incoming mail s	erver			
	Log on using						
	User Name:						
	Password:						
	j	√ Ren	nember password				
	Require Se	cure P	assword Authentic	ation	(SPA)		
				OK	Cancel		



"Connection" tab usually doesn't need changes and looks the following way:

ternet E-mail Settings	5	×					
General	Sent Items	Deleted Items					
Outgoing Server	Connection	Advanced					
Specify the type of connection to use for e-mail.							
Connection							
Connect using my	local area network (LAN	0					
Connect via n	nodem when Outlook is o	ffline					
Connect using my	/ phone line						
Connect using Int	ternet Explorer's or a 3rd	party dialer					
Modem	-						
Use the following Dia	L La Natuorkina connact	ion					
Ose the rollowing Dia	n-op Networking connect						
		¥					
Properties	Add						



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:

Internet E-mail Settings							
General	Sent Items	Deleted Items					
Outgoing Server	Connection	Advanced					
Server Port Numbers							
Incoming server (IMAP)	: 993 Use De	efaults					
Use the following ty	pe of encrypted conn	ection: SSL 💌					
Outgoing server (SMTP)): 465						
Use the following ty	pe of encrypted conn	ection: SSL 💌					
Server Timeouts							
Short	Long 1 minute						
Folders							
Root folder path:							
		OK Cancel					



Click "OK" and then "Test Account Settings...". If the test passed, you will see the following window:

Test Account Settings						
Congratulations! All tests completed successfully. Click Close to continue. Stop						
Clos						
Tasks Errors						
Tasks	Status					
✓ Log onto incoming mail server (IMAP)	Completed					
Send test e-mail message	Completed					



Now click "Next" and then "Finish" buttons. Your email account was successfully added:





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

MAP Folders	×			
Display folders whose names contain:				
	Query			
All Subscribed	Stop			
Folders				
Emailed Contacts Inbox Junk Junk Sent	Subscribe			
Trash	Unsubscribe			
When displaying hierarchy in Outlook, show only subscribed folders.				
OK Cancel	Apply			

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 >> Define Send/Receive Groups...":





Now click "Edit..." button:

Send/Receive Groups						
2	A Send/Receive group contains a collection of Outlook accounts and folders. You can specify the tasks that will be performed on the group during a send/receive.					
	Group Name Send/Receive when					
	All Accounts Online and Offline New					
	Edit					
	Сору					
	Remove					
	Rename					
Setting f	or group "All Accounts"					
	☑ Include this group in send/receive (F9).					
	Schedule an automatic send/receive every 1 🚔 minutes.					
	Perform an automatic send/receive when exiting.					
Wh	en Outlook is Offline					
	☑ Include this group in send/receive (F9).					
	Schedule an automatic send/receive every 30 🚔 minutes.					
	Close					

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":

Send/Receive Settings - All Accounts							
Accounts	 Include the selected account in this group Account Options Select the options you want for the selected ac Send mail items Get folder unread count for subscribed folder Receive mail items Download headers for subscribed folder Ownload complete items including attact Use the custom behavior defined below 	ccount ers 's chments for subscribe	Account Properties				
	Folder Options Select folders from the selected account to incl Center of the selected account to incl Select folders from the selected account to incl Center of the selected account to inclust to inclust to inclust to inclust to inclust to in	ude in send/receive Download head Download comp attachments	ers only lete item including				
			OK Cancel				



By default your sent items are stored in the local folder. To store outgoing correspondence on the server you need to go to "File >> Info >> Account Settings":

File Home Send	/ Receive Folder View CalDav Synchronizer
Save As	Account Information demo@workflow.rocks MAP/SMTP
Open	- Add Account
Print	Account Settings
Help	Modify settings for this account and configure additional connections.
Options	Settings -
🔀 Exit	

Select your profile and click "Change..." button:

Account Settin	ngs						×
E-mail Ad You ca	c ounts n add or rei	move an a	account. You can	select an account and	change its settings.		
E-mail Dat	a Files RS	S Feeds	SharePoint Lists	Internet Calendars	Published Calendars	Address Books	
Sa New	🔀 Repai	r 😭	Change 📀 S	Set as Default 🗙 R	emove 🕈 🖶		
Name				Туре			
🕲 demo@	workflow.ro	ocks		IMAP/SMTP ((send from this account	t by default)	
Selected acc	ount delive	rs new me	essages to the foll	owing location:			
	de i in d	mo@wo l lata file C	rkflow.rocks \In : \Users \BP \ \Ou	box tlook \Outldemo@work	kflow.rocks-00000004.j	ost	
						C	lose



In the new window click "More Settings..." button, then open "Sent Items" tab and select "Save sent items in the following folder on the server:". Select "Sent" folder in the folder tree and press "OK":

I	nternet E-mail Settings				×
	Outgoing Server		Connection		Advanced
	General	Se	ent Items		Deleted Items
	Do not save copies of	sent	items		
L	Save sent items in the	e follo	wing folder on th	e serv	/er:
l	⊡ - 🧐 demo@work	dow.	rocks		More Folders
	Contact	s			New Folder
	Emailed	Cont	acts		
	Inbox				
		mail			
	Save sent items in the	Sent	t Items folder on	this co	omputer
				OK	Cancel

You can also select a network folder for deleted items in the appropriate tab.



Setup Calendar and Address Book

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

Home / Browse	Commun	book with G	oogle, SO	V Synchr Go, Hor	nchi rde or ar	TONIZE	C IDAV se	erver	
Summary	Files	Reviews	Support	Wiki	Code	Tickets •	Blog	Discussion	Donate
★ 4.93 ↓ 6,74 ∭ Last	Stars (35) 7 Downlo 1 Update:) a ds (This Wee 2 days ago	k)			SF Downloa	Id DavSynchro	nizer-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 - <u>https://www.microsoft.com/en-us/download/details.aspx?id=48217</u>

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





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

CalDav Synchronizer
Select Profile Type
Generic CalDAV/CardDAV
Ok Cancel
Add OK Cancel



Below you can see an example of settings for calendar:

Dav Synchronizer	
Profile name: My	Calendar
Server settings	
DAV Url: https://email.workflow.rocks	/dav/demo@workflow.rocks/Calendar/
Username:	demo@workflow.rocks
Password:	******
Email address:	demo@workflow.rocks
Use Google OAuth	Test settings
Outlook settings	
Outlook Folder	Calendar
Synchronize items immediately af	ter 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 (davs):	180
Delete Copy Reset Cache	Advanced options Deactivate

Please note that DAVurl is <a href="https://email.workflow.rocks/dav/<your_email">https://email.workflow.rocks/dav/<your_email

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: <u>https://email.workflow.rocks/dav/demo@workflow.rocks/Contacts</u> Select a local folder, eg "Contacts":

alDav Synchronizer
My Calendar 🚨 My Address Book
Profile name: Mr. Address Peok
Server settings
DAV Url: https://email.workflow.rocks/dav/demo@workflow.rocks/Contacts
Username: demo@workflow.rocks
Password:
Email address: demo@workflow.rocks
Use Google OAuth Test settings
Outlook settings
Outlook Folder Contacts
Synchronize items immediately after change
Sync settings
Synchronization interval (minutes):
Synchronize timespan past (days): 60
Synchronize timespan future (days): 180
Delete Copy Reset Cache Advanced options Deactivate
Add OK Cancel

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