

Outlook 2013 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 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":

¢	
Info	Account Information
Open & Export	
Save As	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":

Add Account		×
Auto Account Setup Manual setup of a	account or connect to other server types.	Ť\$
🔘 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.	
Manual setup or a	Iditional server types	
	< Back Next >	Cancel



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

Add Account	×
Choose Service	× ×
 Microsoft Exchange Server or compatible service Connect to an Exchange account to access email, calendars, contacts, tasks, and voice mail Outlook.com or Exchange ActiveSync compatible service Connect to a service such as Outlook.com to access email, calendars, contacts, and tasks POP or IMAP Connect to a POP or IMAP email account Other Connect to a server type that is listed below Fax Mail Transport 	
< Back Next >	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:

Add Account		×
POP and IMAP Account Set Enter the mail server setting		×.
User Information		
Your Name:	John Smith	
Email Address:	demo@workflow.rocks	Mail to keep offline: All
Server Information		· · · · · ·
Account Type:	IMAP 🗨	
Incoming mail server:	email.workflow.rocks	
Outgoing mail server (SMTP):	email.workflow.rocks	
Logon Information		
User Name:	demo@workflow.rocks	
Password:	*****	
📝 Re	emember password	
Require logon using Secur (SPA)	e Password Authentication	More Settings
		< Back Next > 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:

Internet E-mail Settings	x
General Outgoing Server Advanced	_
My outgoing server (SMTP) requires authentication	
Our contract of the second	
🔘 Log on using	
User Name:	
Password:	
Remember password	
Require Secure Password Authentication (SPA)	
OK	



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 Outgoing Server Advanced
Server Port Numbers
Incoming server (IMAP): 993 Use Defaults
Use the following type of encrypted connection: SSL
Outgoing server (SMTP): 465
Use the following type of encrypted connection: SSL
Server Timeouts
Short Jong 1 minute
Folders
Root folder path:
Sent Items
Do not save copies of sent items
Deleted Items
Mark items for deletion but do not move them automatically
Items marked for deletion will be permanently deleted when the items in the mailbox are purged.
V Purge items when switching folders while online
OK Cancel



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:

Congratulations! All tests completed successfully. Click Close to Stop Close Close					
Tasks Errors					
Status					
Completed					
Completed					
	Status Completed				

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":

0 <mark>2</mark>							Inbo	x - demo@v	vorkflow.rocks
FILE	HOME	SEND / RECEIVE	FOLDER	VIEW	CalDa	av Synchronizer			
	ew Search Folder	Rename Folder	der Mark	All Shov	Z↓ w All	🎦 Clean Up Folder ▾ Delete All ເ⊋ Purge ▾		Update Folder List	AutoArchive Settings
Ne	W	Actions			Clean	Up	II	MAP	

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:

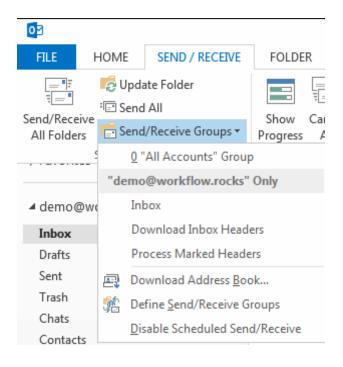
MAP Folders	×
Display folders whose names contain:	
	Query
All Subscribed	Stop
Folders	
Emailed Contacts	\sim
🗀 Inbox	
🚞 Junk	
🛄 Junk E-mail 😑	
🚞 Sent	Subscribe
Trash	Unsubscribe
· · · · · · · · · · · · · · · · · · ·	
When displaying hierarchy in Outlook, show only subscribed folders.	
OK Cancel	Apply

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





Now click "Edit..." button:

Send/Re	eceive Groups		—				
êz	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 whe	n				
	All Accounts	Online and Offline	e New				
			Edit				
			Сору				
			Remove				
			Rename				
Setting	for group "All Accour	nts"					
	🔽 Include this grou	ıp in send/receive (F9).					
	🔽 Schedule an auto	omatic send/receive every	1 🚔 minutes.				
	Perform an autor	natic send/receive when ex	kiting.				
W	hen Outlook is Offlin	e					
	🔽 Include this grou	ıp in send/receive (F9).					
	C Schedule an auto	omatic 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 Setting	gs - All Accounts
Accounts	 Include the selected account in this group Account Options Select the options you want for the selected account Send mail items Get folder unread count for subscribed folders Receive mail items Download complete items including attachments for subscribed folders Use the custom behavior defined below
	Folder Options Select folders from the selected account to include in send/receive. Complete items including attachments will be downloaded for subscribed folders.
	OK Cancel



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 / Communications / Email / Outlook CalDav Synch Outlook CalDav Sy Sync Outlook with Google, SOGo, Hol	
Sync Outlook with Google, SOGo, Ho Brought to you by: caldavsync, nertsch, nimm Summary Files Reviews Support Wiki	
 ★ 4.9 Stars (35) ↓ 6,747 Downloads (This Week) (II) 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 - <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:

0					
FILE	HOME	SEND / RECEIVE	FOLDER	VIEW	CalDav Synchronizer
-		🚺 About ofiles 🖂 Reports			
CalDav Synchronizer					



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				
	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			
0 d 1 m				
Outlook settings				
Outlook Folder 0	Calendar			
Synchronize items immediately after change				
Sync settings				
Synchronization Mode:	Dutlook ←→ CalDav ▼			
Conflict Resolution:	Automatic 🔹			
Synchronization interval (minutes):	30 🗸			
Use time range filter				
Synchronize timespan past (days):	60			
Synchronize timespan future (days):	180			
Lynemen and an appart takar o (obyo).				
Delete Copy Reset Cache	Advanced options Deactivate			
Add	OK Cancel			

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":

CalDav Synchronizer						
My Calendar 🚨 My Address Book						
Profile name: My Add	dress Book					
DAV Url: https://email.workflow.rocks/day	u (dama Quad flaur malca (Cantanta					
	demo@workflow.rocks					
Password:	eemo@worknow.rocks					
	land Quellin and a					
Email address:	demo@workflow.rocks					
Use Google OAuth	Test settings					
Outlook settings						
Outlook Folder Cont	acts					
Synchronize items immediately after of	Synchronize items immediately after change					
Sync settings						
Synchronization Mode: Outle	ook $\leftarrow \rightarrow$ CalDav \checkmark					
Conflict Resolution: Auto	omatic 🔹					
Synchronization interval (minutes):	30 🔹					
Use time range filter						
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.