



**tax**WorkFlow

# **Outlook 2007 settings for workflow.rocks email server**

February, 2016

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

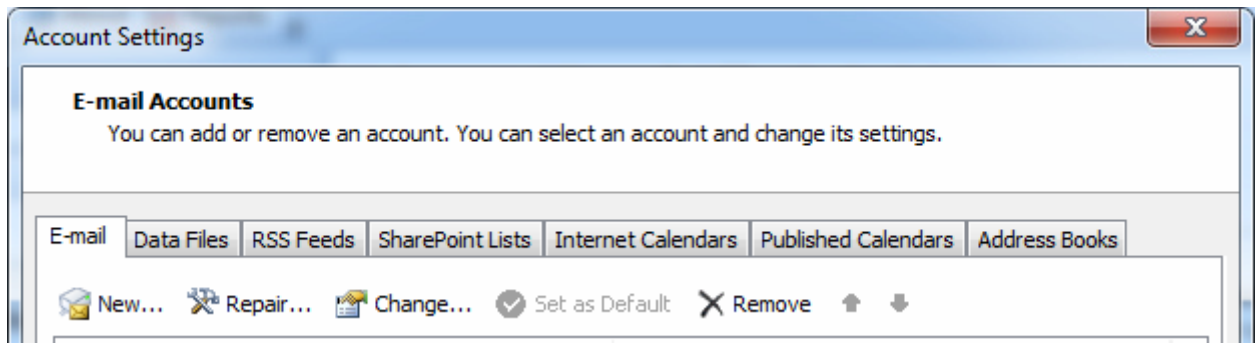
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## Set up your email account

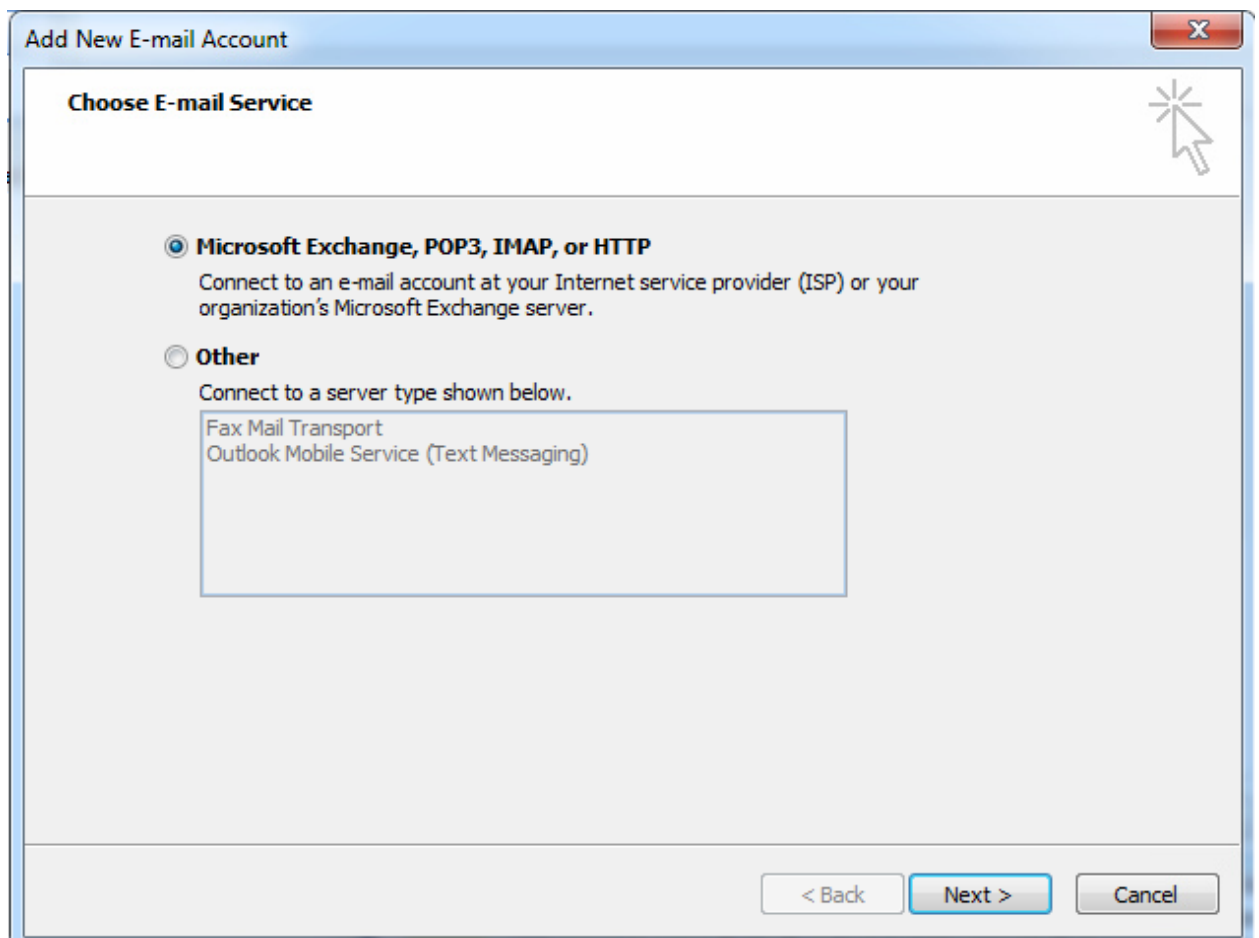
Outlook 2007 can successfully work with your workflow.rocks email account. Network Calendar and Address Book are also available in this version of the application.

To setup your email box in Outlook 2007 you need to create a new Email account first. Go to “Tools >> Account Settings...” and click “New...” in the “E-mail” tab:

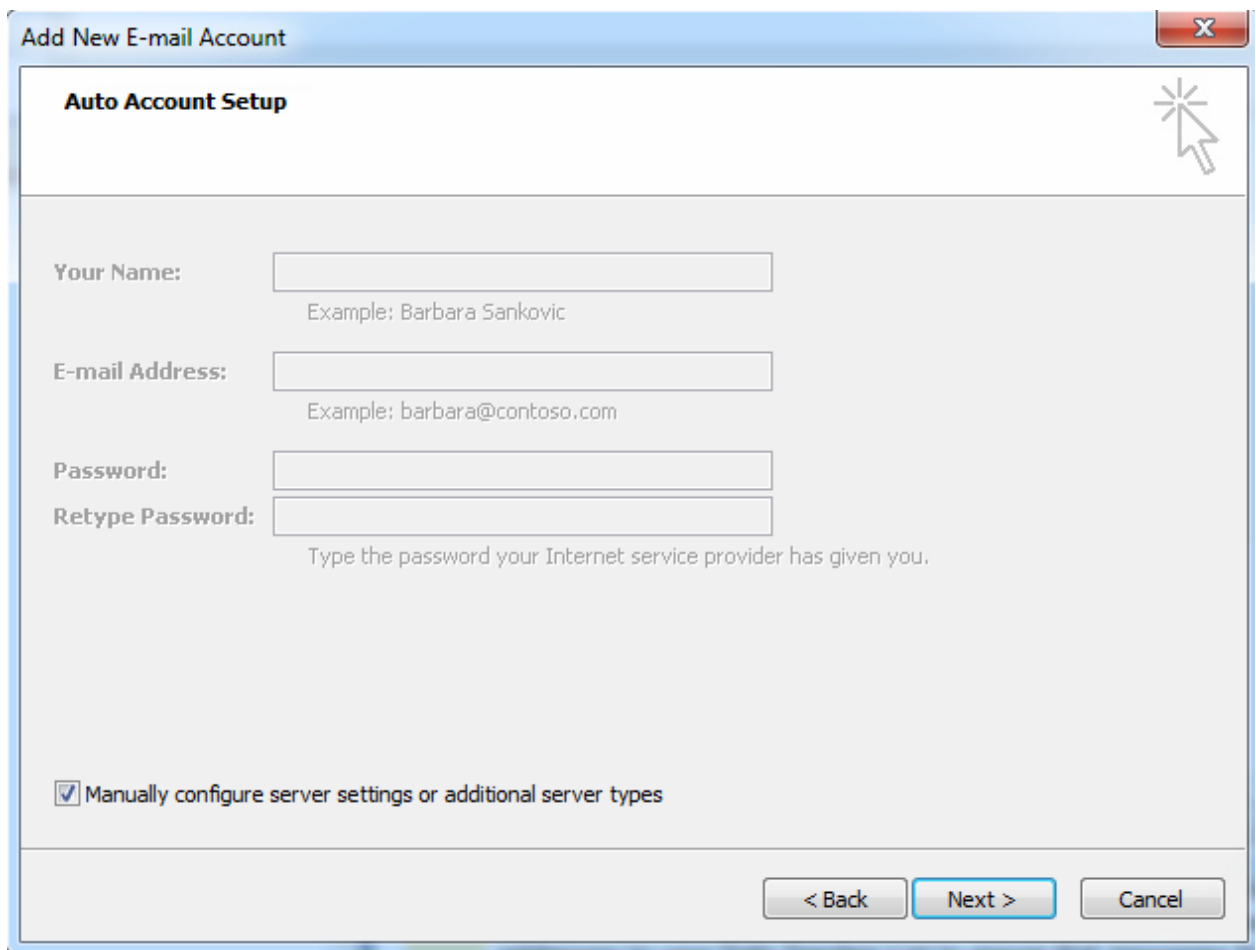


If you need to check an existing account’s settings, select it from the list and click “Change...” button.

In the new window select “Microsoft Exchange, POP3, IMAP, or HTTP” option and click “Next”:



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”:

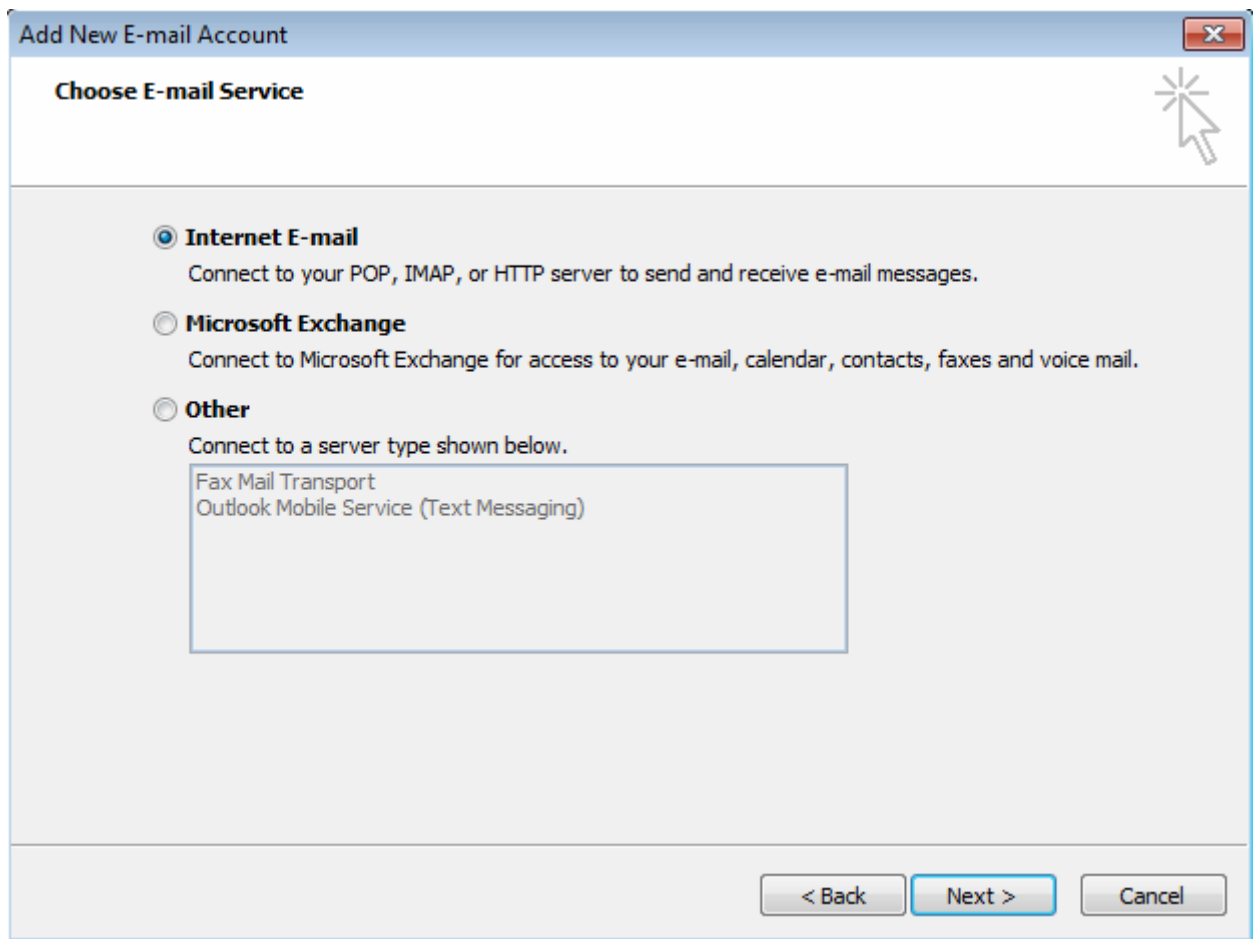


The screenshot shows the 'Add New E-mail Account' dialog box in Outlook 2007. The window title is 'Add New E-mail Account' with a close button (X) in the top right corner. The main area is titled 'Auto Account Setup' and contains the following fields and options:

- Your Name:** A text input field with the example text 'Example: Barbara Sankovic' below it.
- E-mail Address:** A text input field with the example text 'Example: barbara@contoso.com' below it.
- Password:** A text input field.
- Retype Password:** A text input field with the instruction 'Type the password your Internet service provider has given you.' below it.
- Manually configure server settings or additional server types**

At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted with a blue border.

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

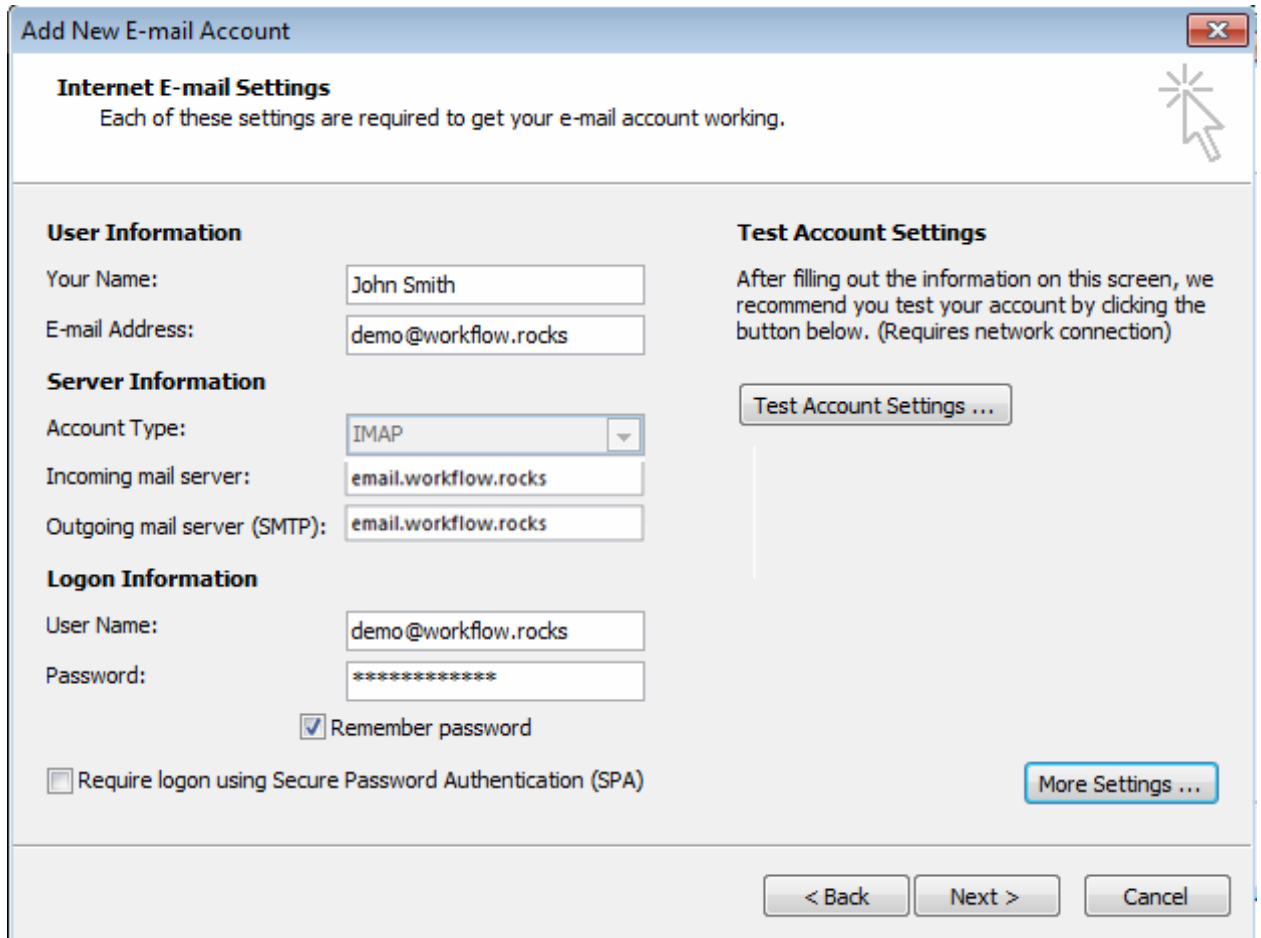


Fill in all your settings in the new window. Select IMAP account type.

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:



**Add New E-mail Account**

**Internet E-mail Settings**  
Each of these settings are required to get your e-mail account working.

**User Information**

Your Name: John Smith

E-mail Address: demo@workflow.rocks

**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: \*\*\*\*\*

Remember password

Require logon using Secure Password Authentication (SPA)

**Test Account Settings**

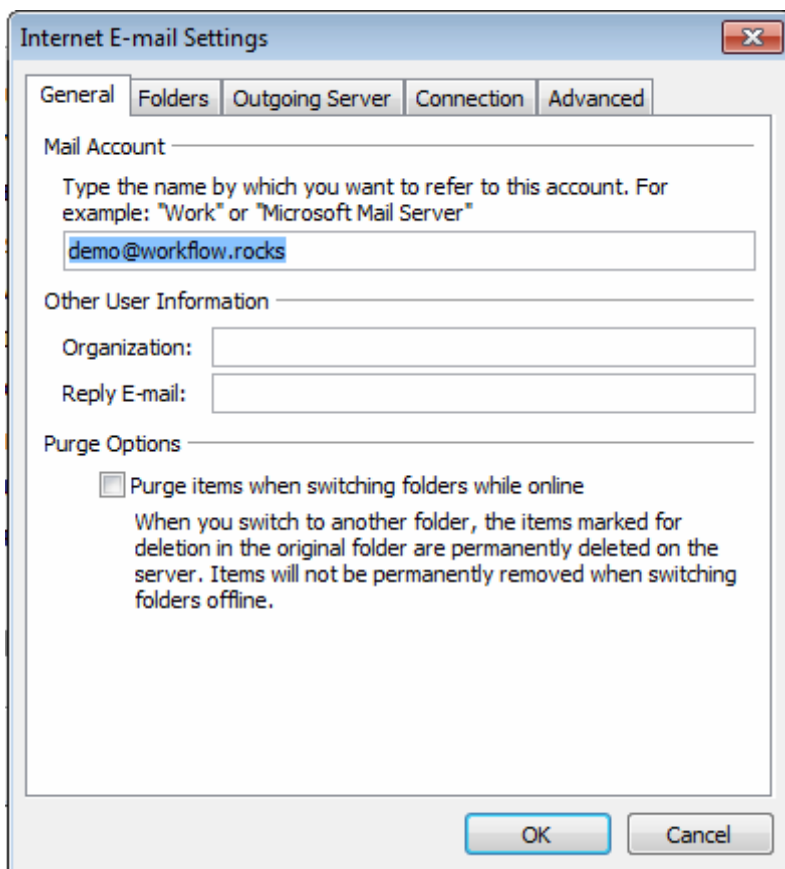
After filling out the information on this screen, we recommend you test your account by clicking the button below. (Requires network connection)

Test Account Settings ...

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 Folders Outgoing Server Connection 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:

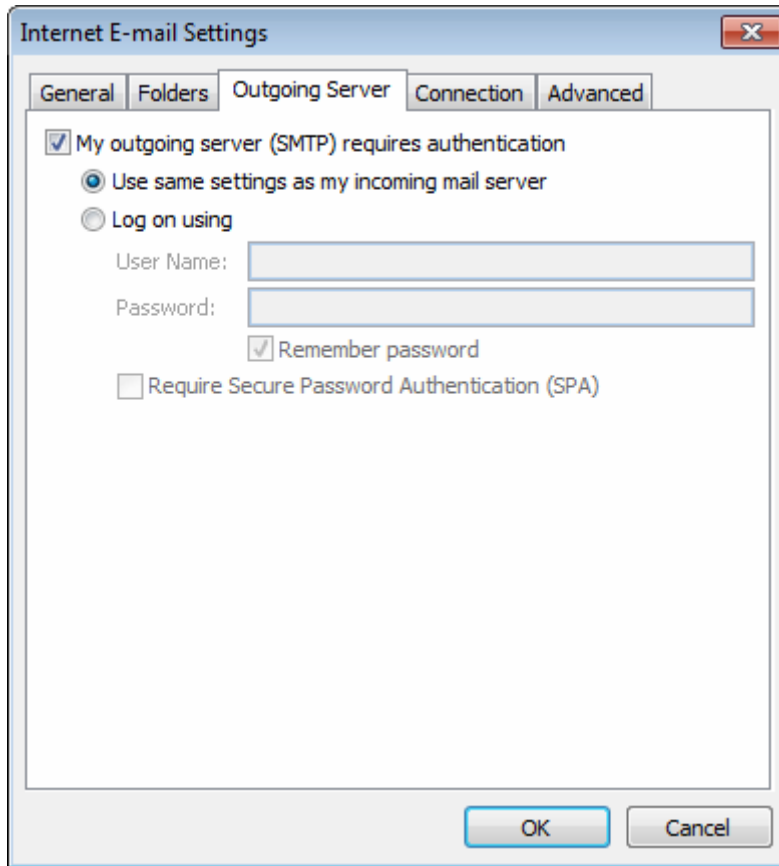
Purge Options

Purge items when switching folders while online

When you switch to another folder, the items marked for deletion in the original folder are permanently deleted on the server. Items will not be permanently removed when switching folders offline.

OK Cancel

In the “Folders” tab you can’t change anything right now. Open “Outgoing Server” tab and select the following settings:



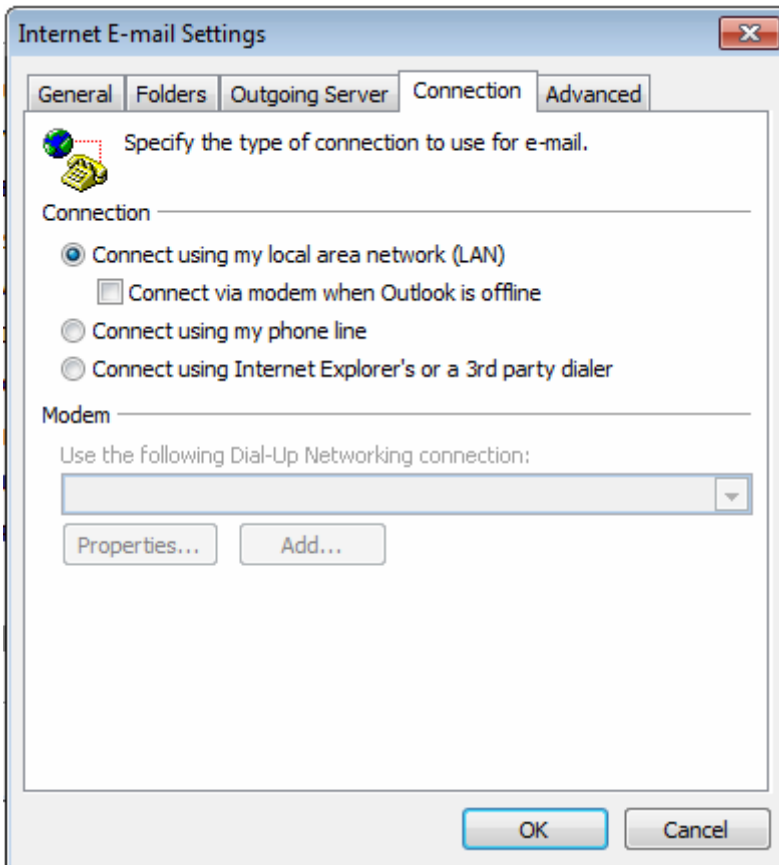
The screenshot shows the 'Internet E-mail Settings' dialog box with the 'Outgoing Server' tab selected. The settings are as follows:

- 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)

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

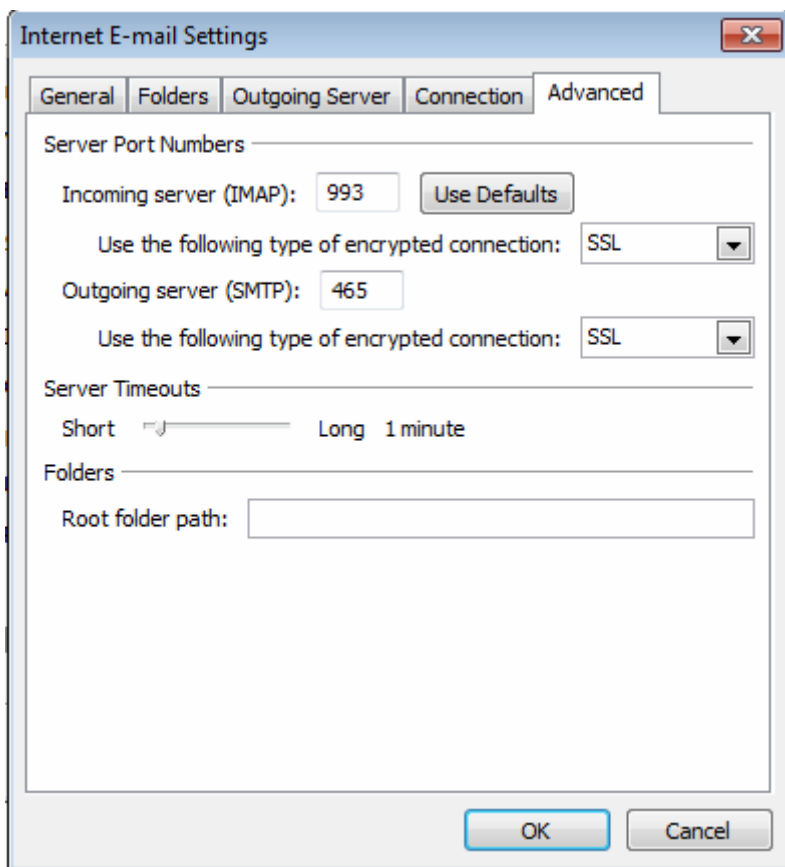


“Connection” tab usually doesn’t need changes and looks the following way:

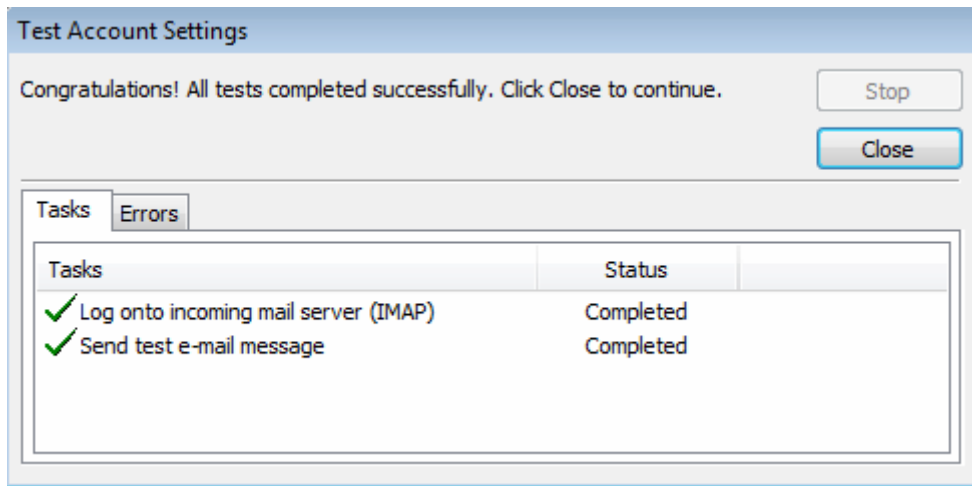


In “Advanced” tab from “Use the following type of encrypted connection:” drop-down list select “SSL” for incoming server (IMAP) and for outgoing server (SMTP), too.

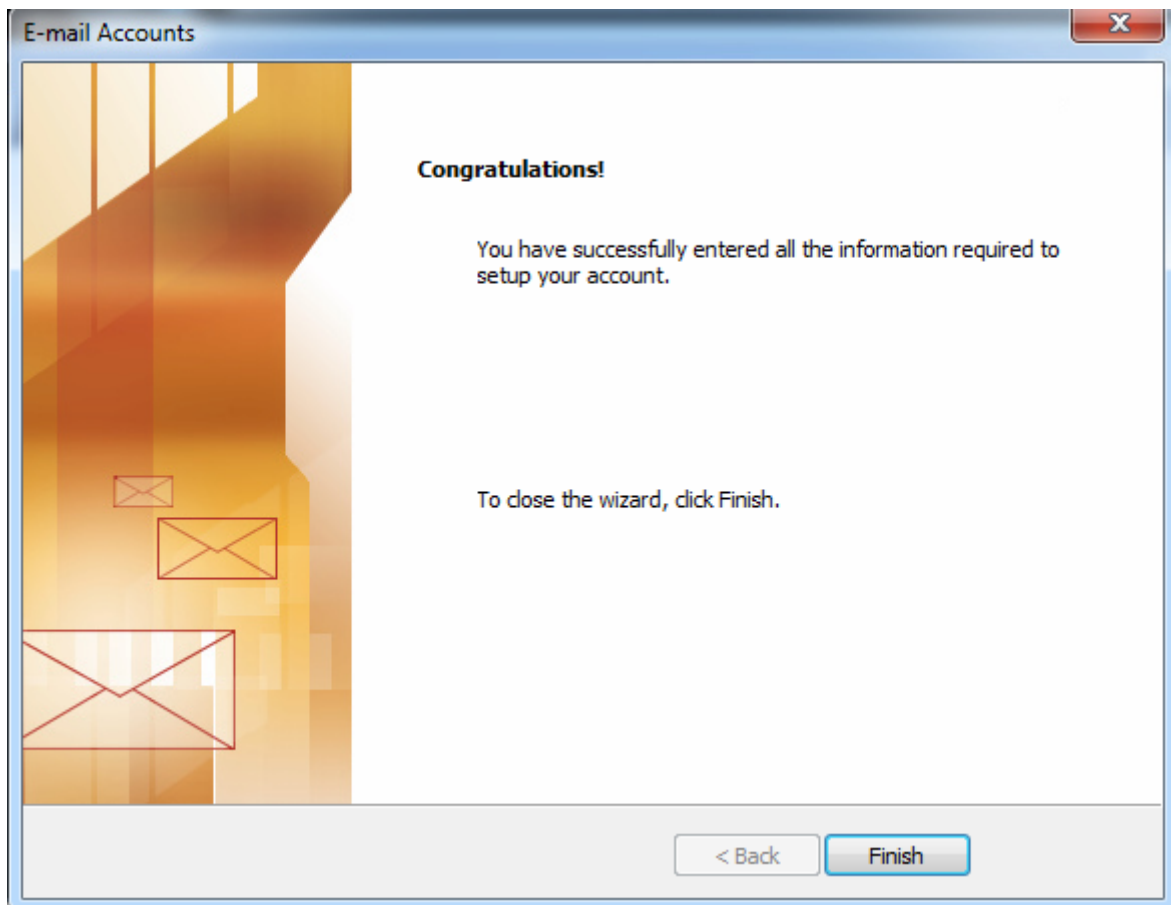
Check server port numbers. It must be 993 for incoming server and 465 for outgoing server:



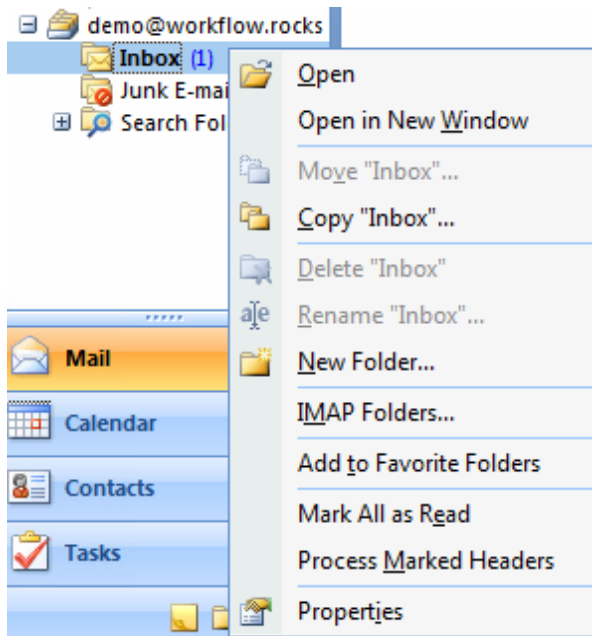
Click “OK” and then “Test Account Settings...”. If the test passed, you will see the following window:



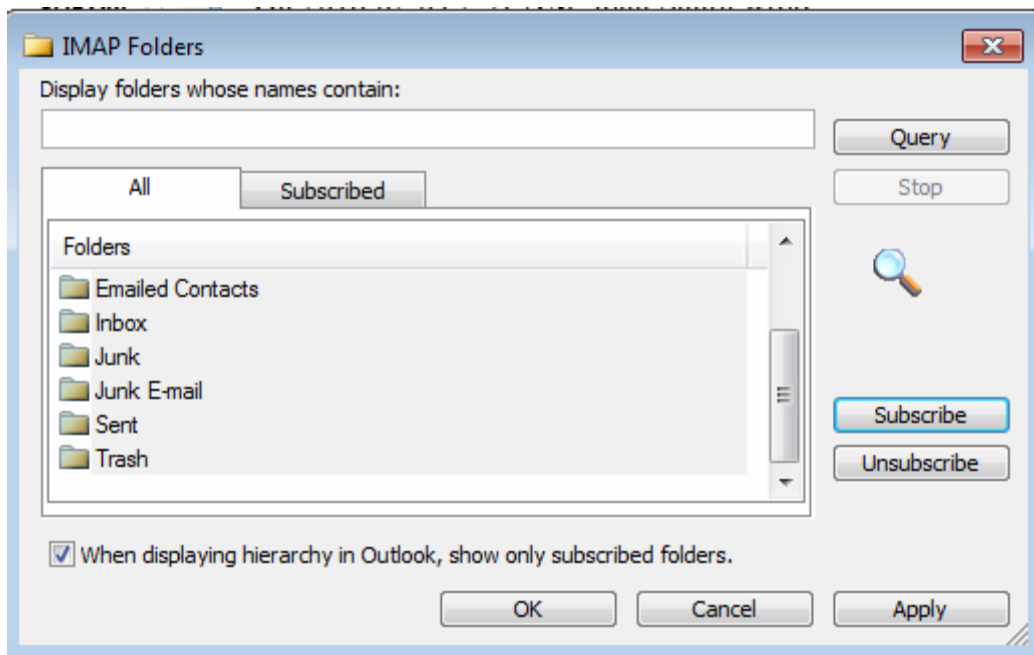
Now click “Next” and then “Finish” buttons. Your email account was successfully added:



If you can't see all IMAP folders in your account click right mouse button on your Inbox folder and select "IMAP Folders...":



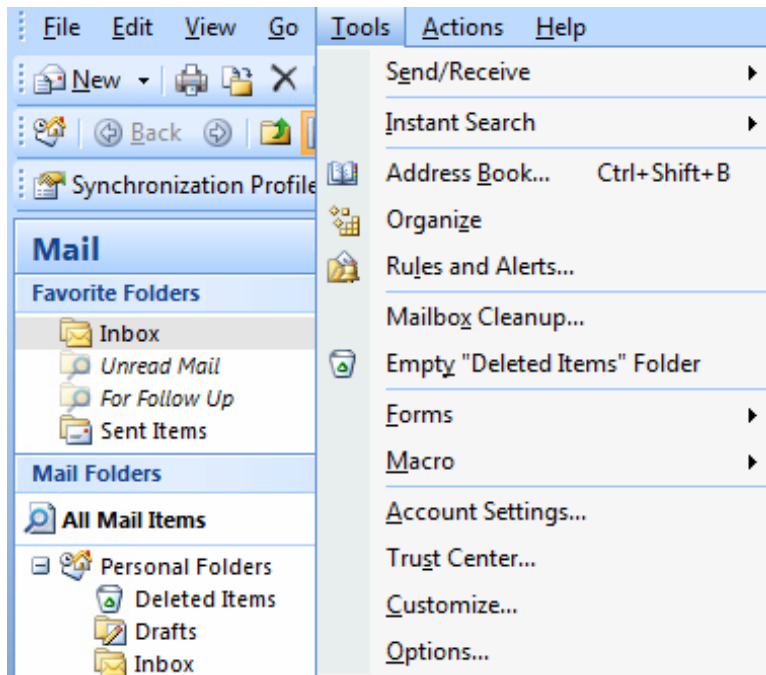
If there are no folders in the list of the "All" tab you need to click on "Query" button. Leave "Display folders whose names contain:" field blank and all folders will appear in the list:



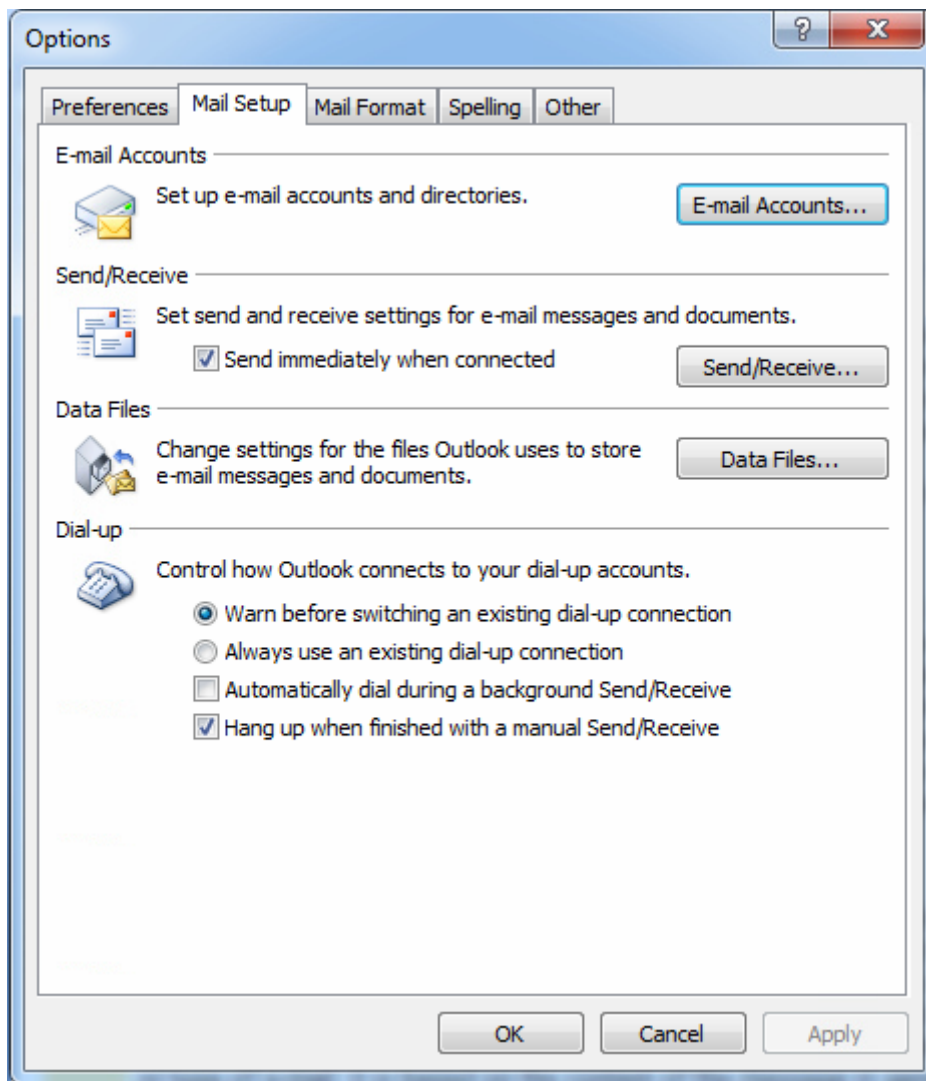
Select the folders you want to be displayed in Outlook and press "Subscribe". Then click "OK".

## Configure how Outlook receives your email

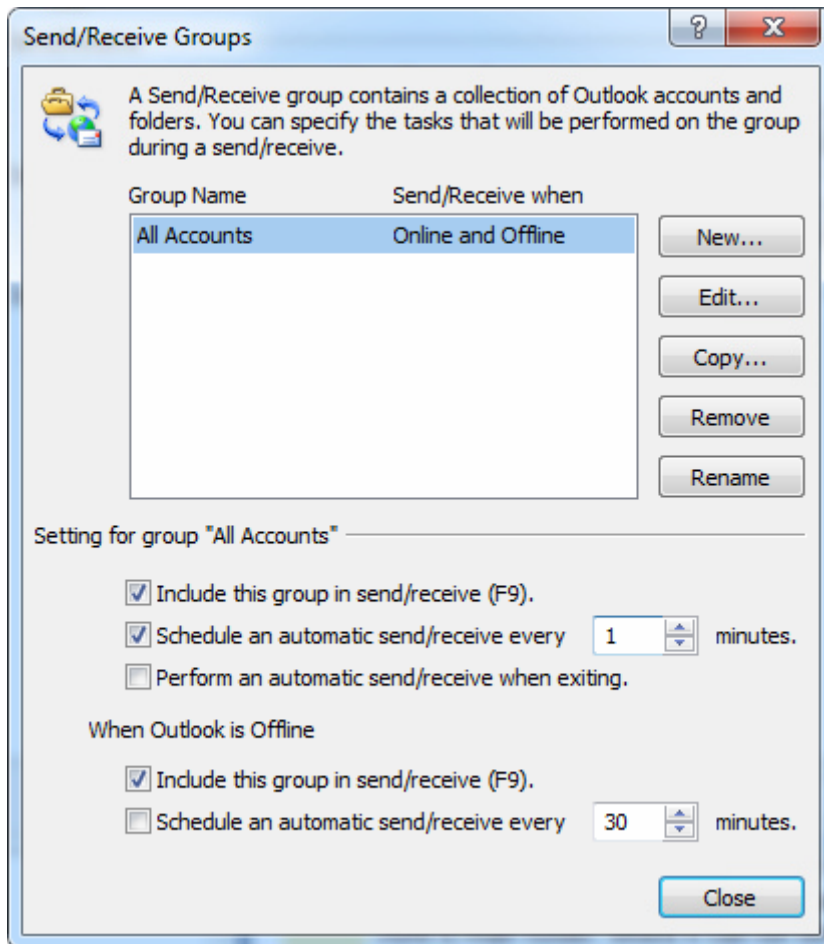
By default your Outlook may download only headers and it will always take a time to see a selected email. To make Outlook to download complete items including attachments select “Tools >> Options...”:



In the “Mail Setup” tab click on “Send/Receive...” button:



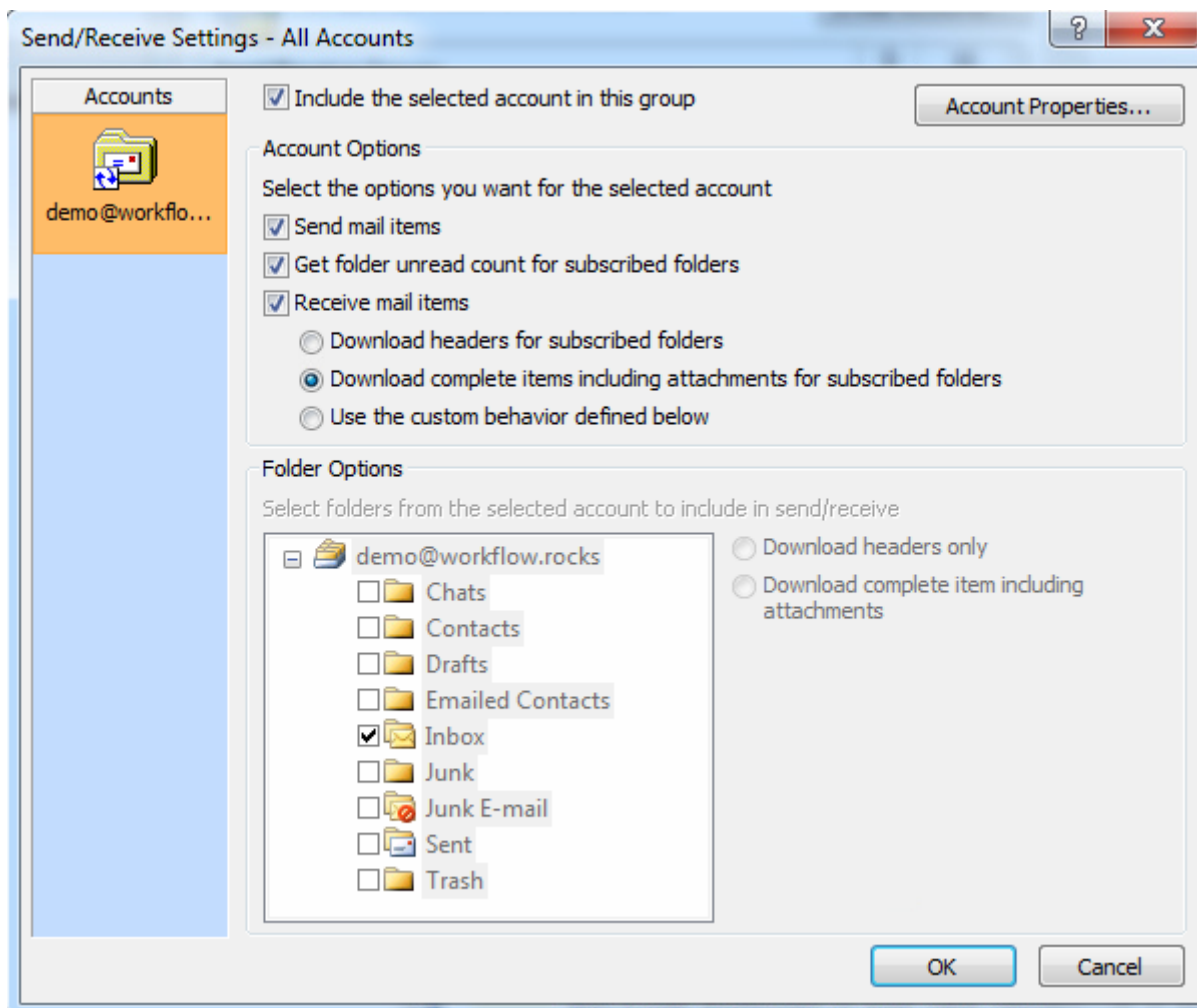
Now click "Edit..." button:



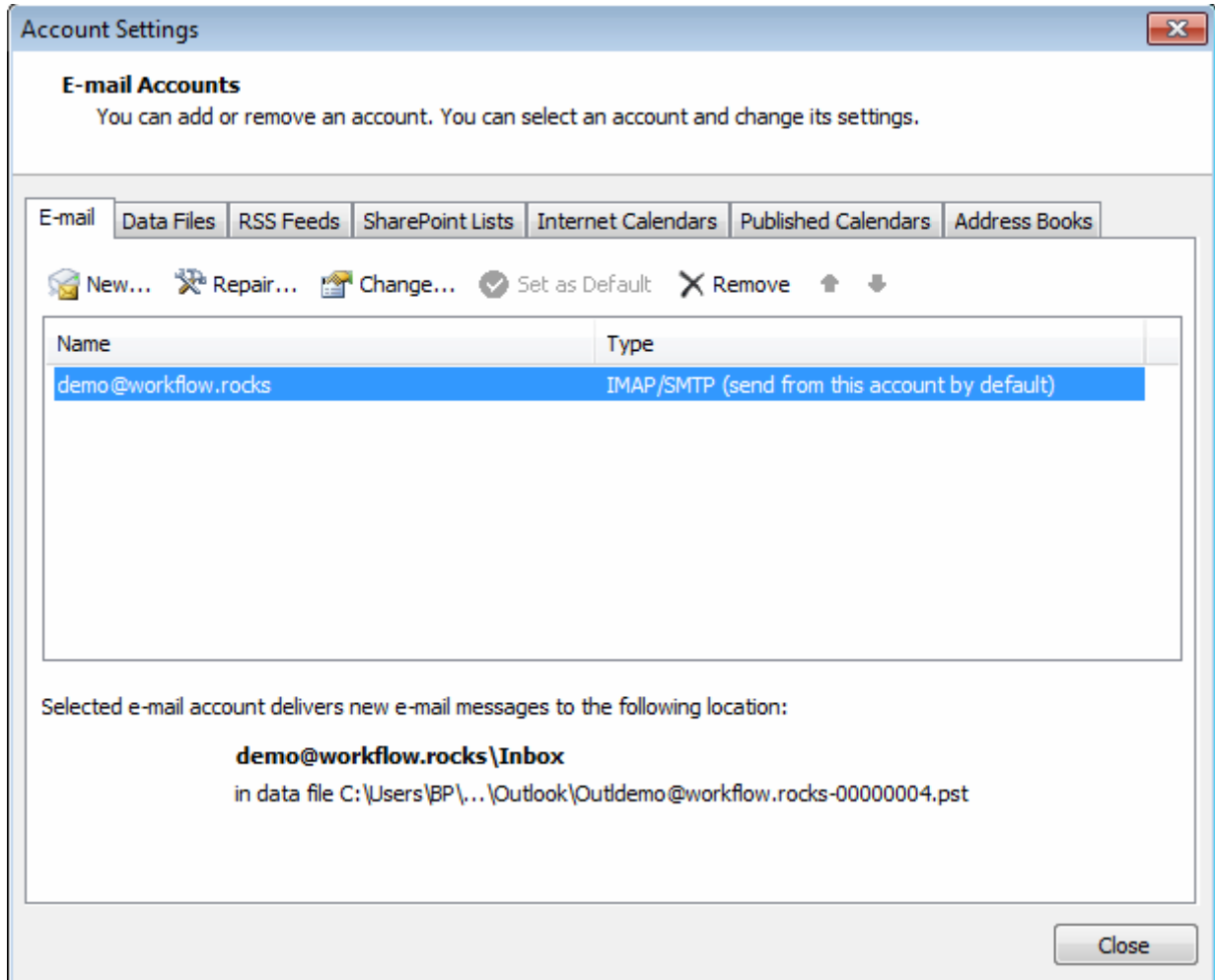
Also you can schedule an automatic send/receive interval in this window.



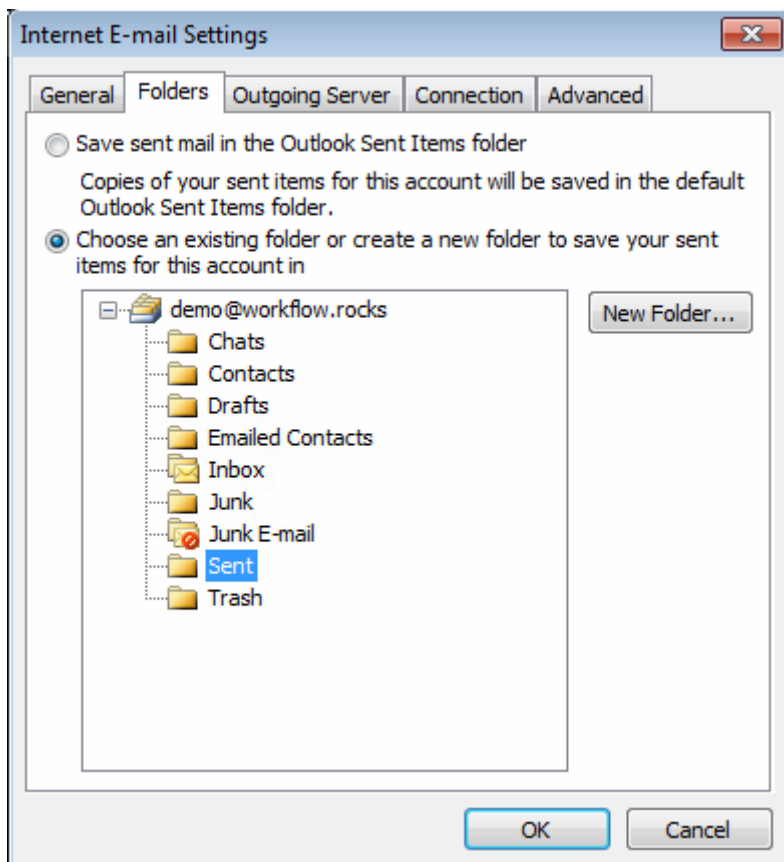
In the new window press “Download complete items including attachments for subscribed folders” radio button and press “OK”:



By default your sent items are stored in the local folder. To store outgoing correspondence on the server you need to go to “Tools >> Account Settings...”. Select your profile and click “Change...” button:



In the new window click “More Settings...” button, then open “Folders” tab and select “Choose an existing folder or create a new folder to save your sent items for this account in”. Select “Sent” folder in the folder tree 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

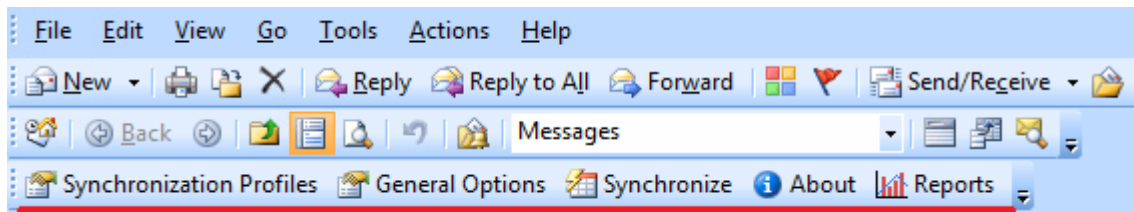
★ 4.9 Stars (35)  
↓ 6,747 Downloads (This Week)  
📅 Last Update: 2 days ago

Download  
OutlookCalDavSynchronizer-1.15.0.zip

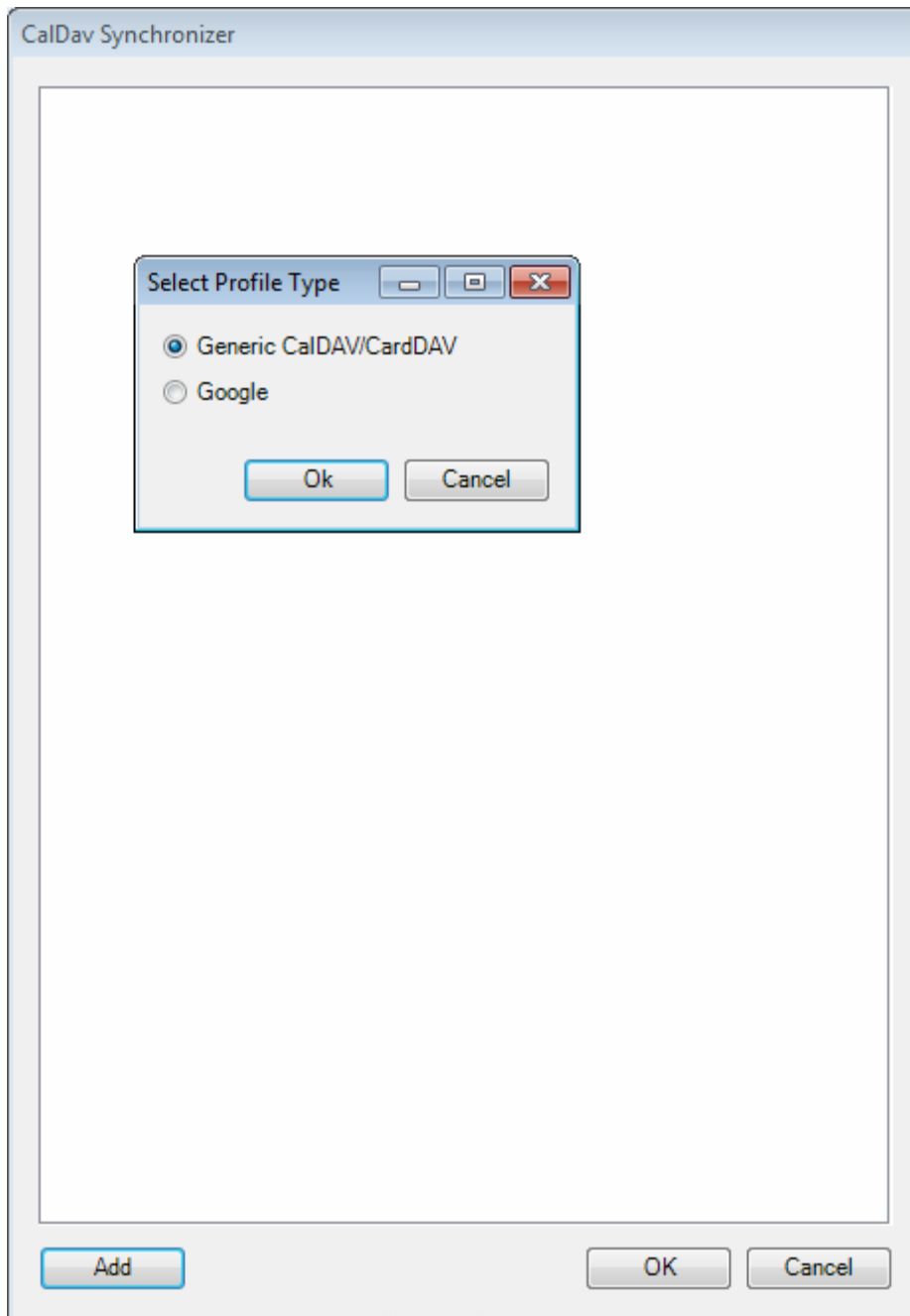
Extract the OutlookCalDavSynchronizer-<Version>.zip into the same folder, close your Outlook application and start setup.exe.

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>

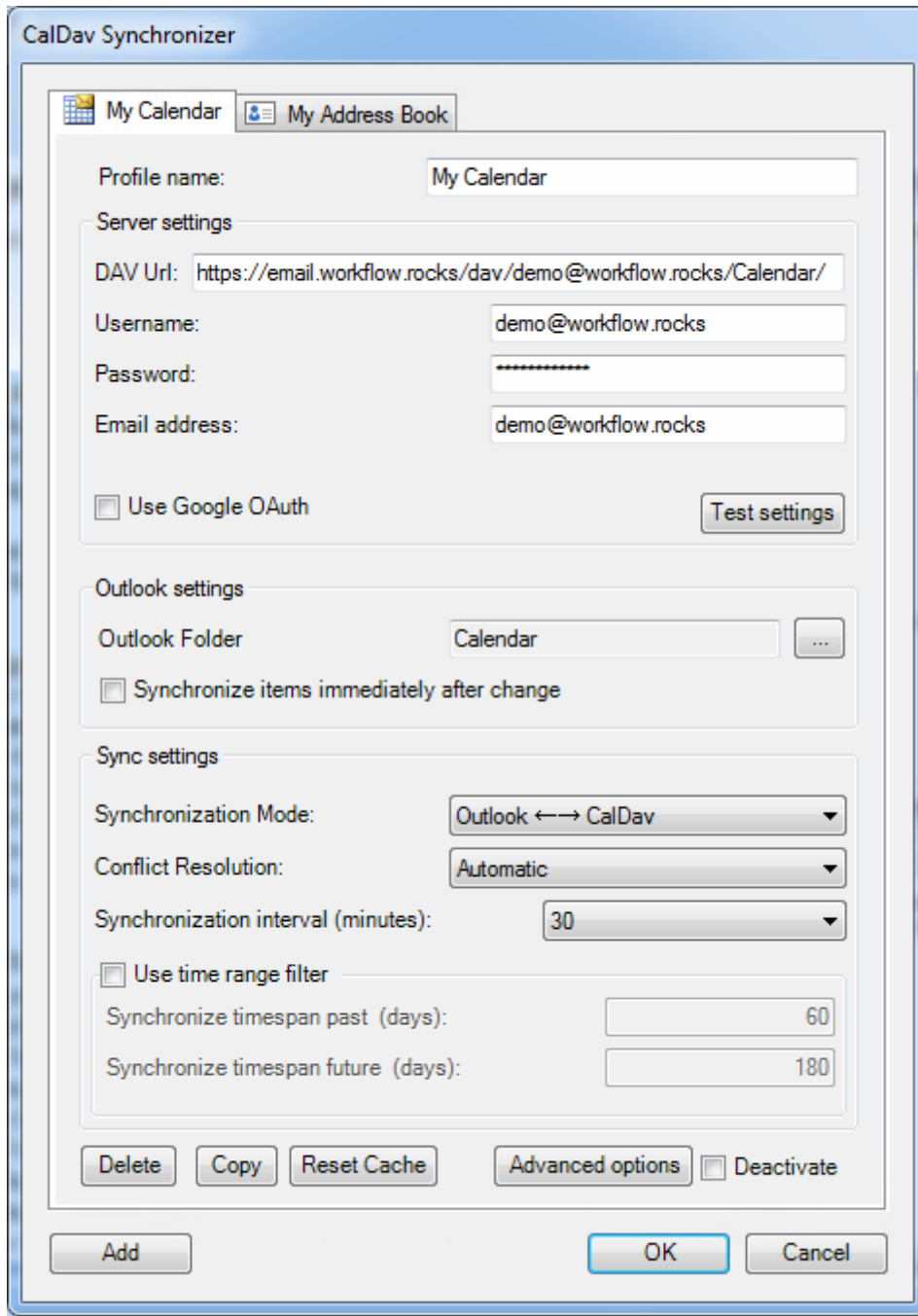
When the add-on is installed, open Outlook and you will see a new set of buttons:



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



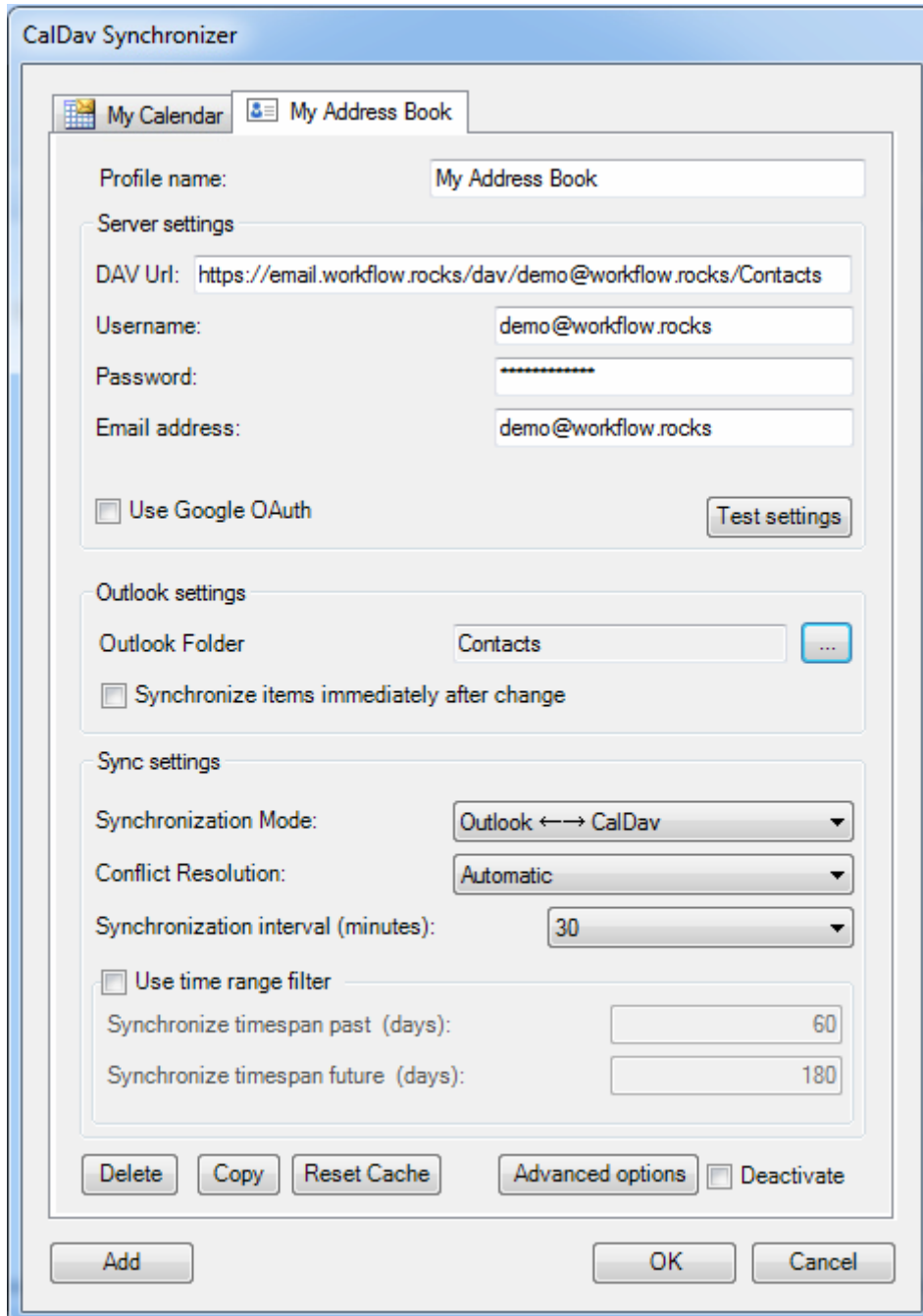
Below you can see an example of settings for calendar:



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 'Profile name' is 'My Address Book'. Under 'Server settings', the 'DAV Url' is 'https://email.workflow.rocks/dav/demo@workflow.rocks/Contacts', 'Username' is 'demo@workflow.rocks', 'Password' is masked with asterisks, and 'Email address' is 'demo@workflow.rocks'. There is a 'Test settings' button and an unchecked 'Use Google OAuth' checkbox. Under 'Outlook settings', the 'Outlook Folder' is 'Contacts' and 'Synchronize items immediately after change' is unchecked. Under 'Sync settings', 'Synchronization Mode' is 'Outlook ↔ CalDav', 'Conflict Resolution' is 'Automatic', and 'Synchronization interval (minutes)' is '30'. There is an unchecked 'Use time range filter' checkbox, with 'Synchronize timespan past (days)' set to 60 and 'Synchronize timespan future (days)' set to 180. At the bottom, there are buttons for 'Delete', 'Copy', 'Reset Cache', 'Advanced options', and 'Deactivate' (unchecked), along with 'Add', 'OK', and 'Cancel' buttons.

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