

How to set up Public Folders for Off Line Use - Short Version - no Pictures
(long version with pictures follows this section)

1. Edit your email Accounts. (Tools | Email Accounts | View or Change Email Existing Accounts)
2. Highlight your exchange server account (you may only have this account) and select Change...
3. Select 'More Settings....'
4. Choose the 'advanced' tab. Make sure both 'Use cached exchange Mode' and 'Download Public Folder Favorites' are ticked.
5. If no offline or cached working was set up previously, you may need to re-start Outlook at this point. If you do, make sure Outlook has completely shut down before restarting. (You can check in Task Manager on the process tab to see whether there is a process called Outlook.exe. If there is wait a few seconds and then end the process.)
6. Now you need to copy the folders you want made available 'offline' into the 'Public Folder Favorites' folder. Right click the top level folder you wish to add and select the option 'Add to favorites'.
7. Select 'options' and tick 'Add subfolders', 'add all subfolders', 'automatically add new subfolder', 'add all subfolders'. Now click Add.
8. The folders will be added under your public folder favorites, and will begin to populate with items from the server. This is the cached mode starting to work (making a local cache of all the server items).
9. You now need to set the public folder favorites to also be available offline. Select Tools | Send Receive Settings | Send receive groups | Define send receive groups (or press ctrl-alt-S)
10. Decide how often you want Outlook to update your offline folders when on-line and offline and set the schedule accordingly at the bottom of the window 'Setting for Group' all accounts.
11. Highlight 'All Accounts' and select 'Edit'
12. Make sure all the 'Account Options' boxes are ticked in the top half of the form.
13. In the 'Folder Options' section in the bottom half of the form, make sure all the folders you want to have an offline copy of are ticked. You will need to expand all the folders. (or right click the top folder and select 'tick all sub folders'.
14. For TeamScope CRM , this is all the sub folders, AND another configuration folder under the 'Notes' folder in your personal mailbox. Tick any other folders in your own mailbox that you may want offline while you are there.
15. Press OK. You have finished the set-up. You now need to press 'Send-Receive' and wait for all the information to download from the server. If you have large folders, this may take a while the first time you do the send receive.

Potential Problems

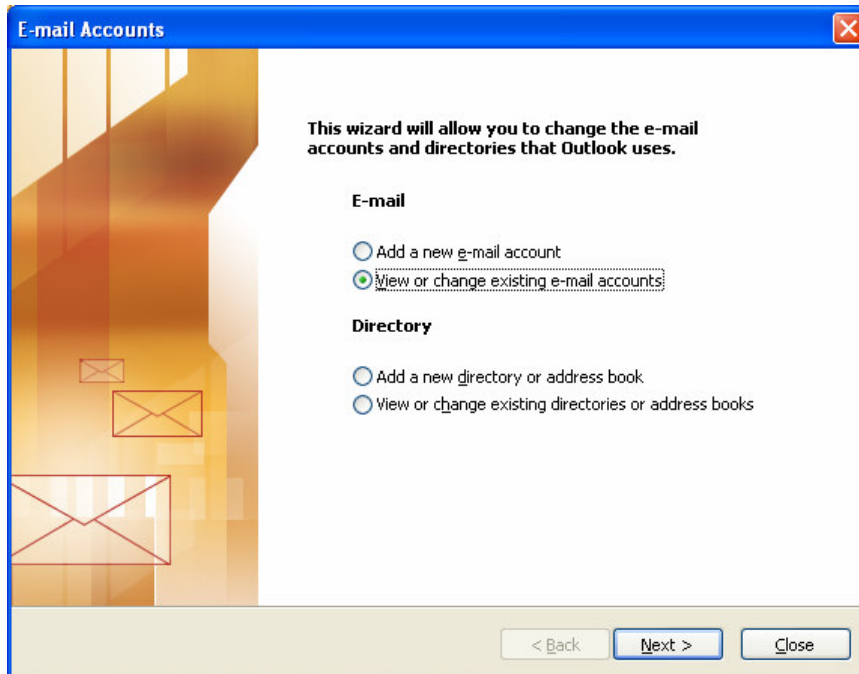
If you are using custom forms and they don't appear - you may have an early version of Outlook 2003. If you have version 11.5606.5606 (or similar) you will need to add at least service pack 1 - preferably Service Pack 2 of Outlook or Office to get custom forms to work with offline folders.

If you are running TeamScope, and you don't add all the sub folders, or you change the hierarchy, TeamScope will not be able to find the folders. It will use the favorites by default, even if you are on-line. You will need to move the folders in favorites so that the parent and sub folder structure stays the same. If necessary, delete the favorites folders (it won't delete the originals) and re-add them.

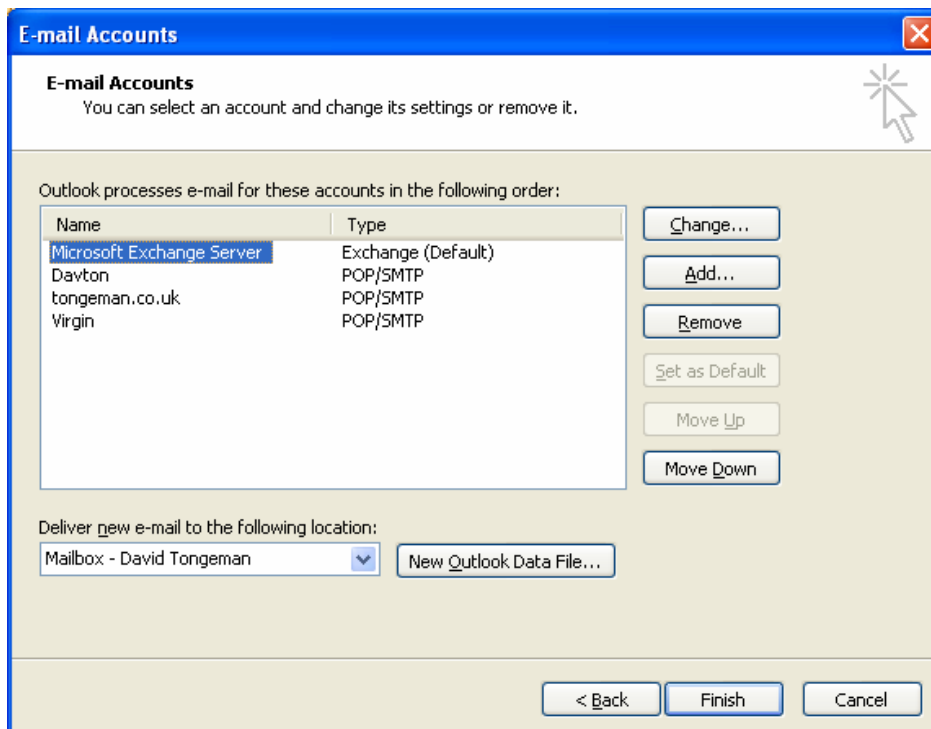
How to set up Public Folders for Off Line Use (Long Version - with pictures)

1. Edit your email Accounts

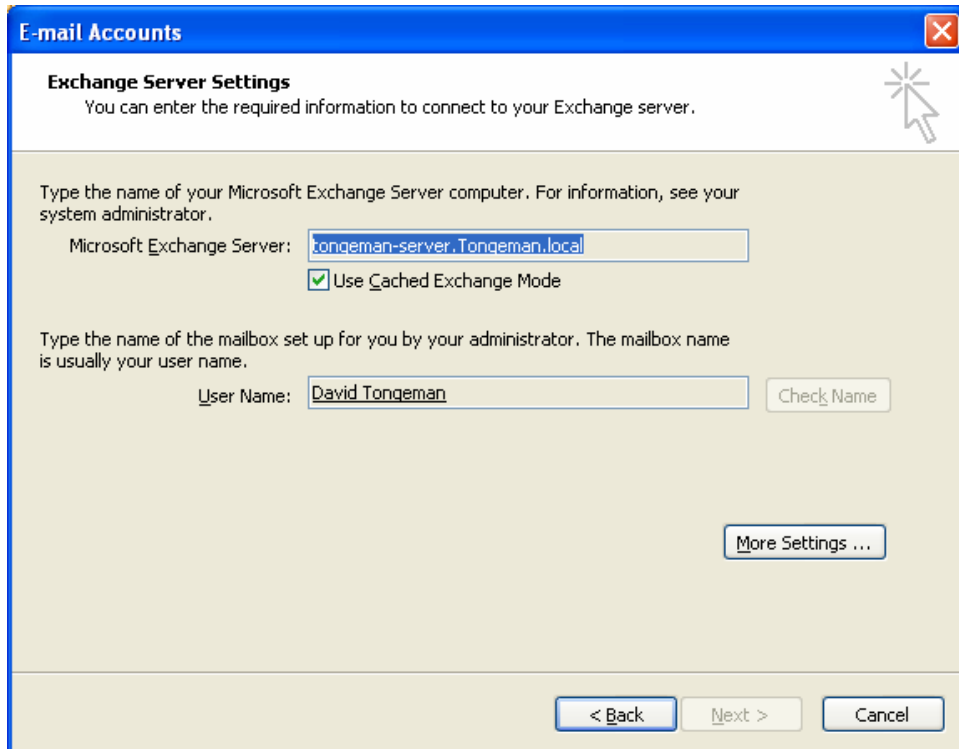
Tools | Email Accounts | View or Change Email Existing Accounts



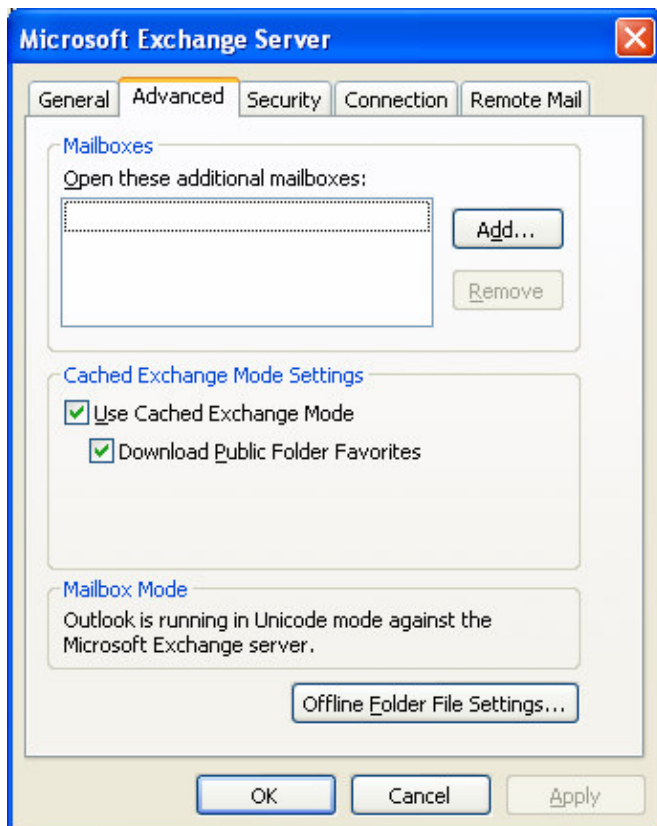
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3. Select 'More Settings....'

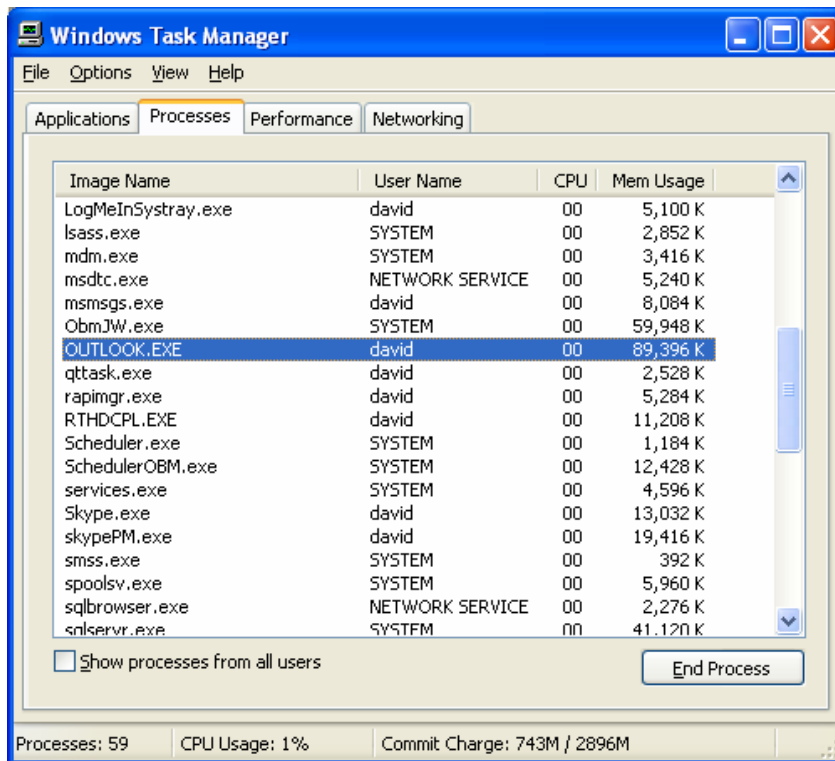


4. Choose the 'advanced' tab

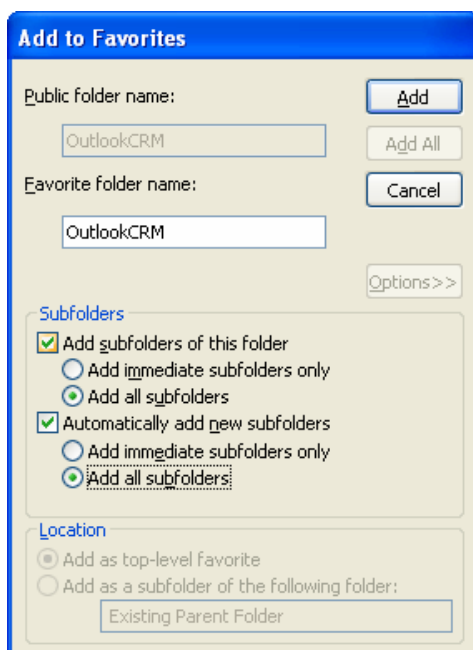


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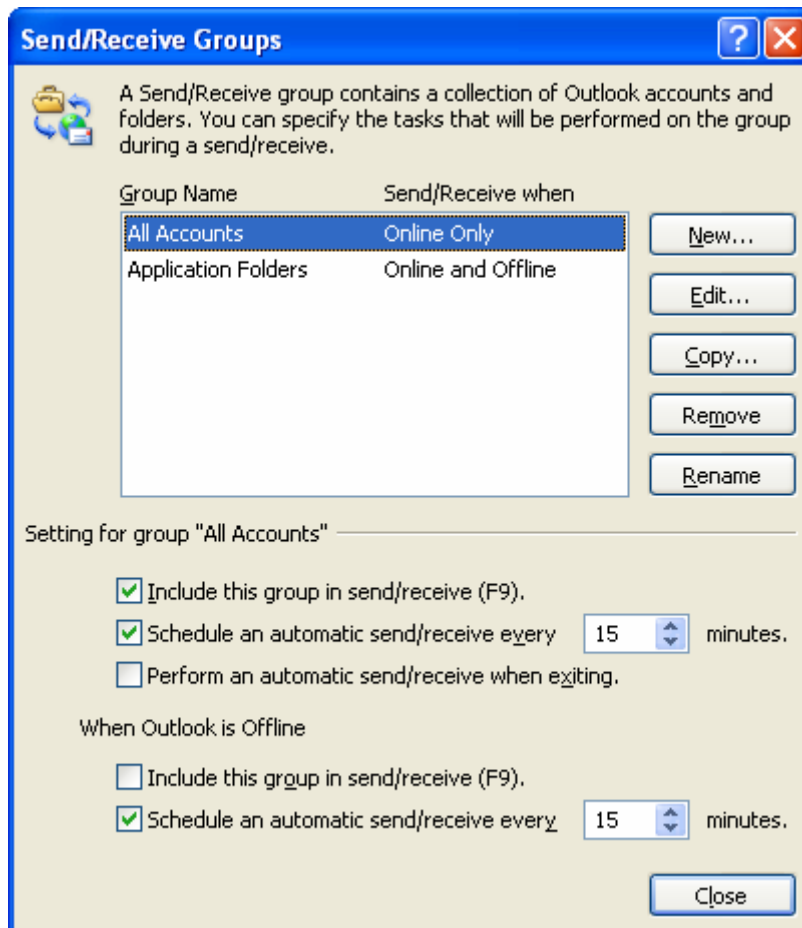


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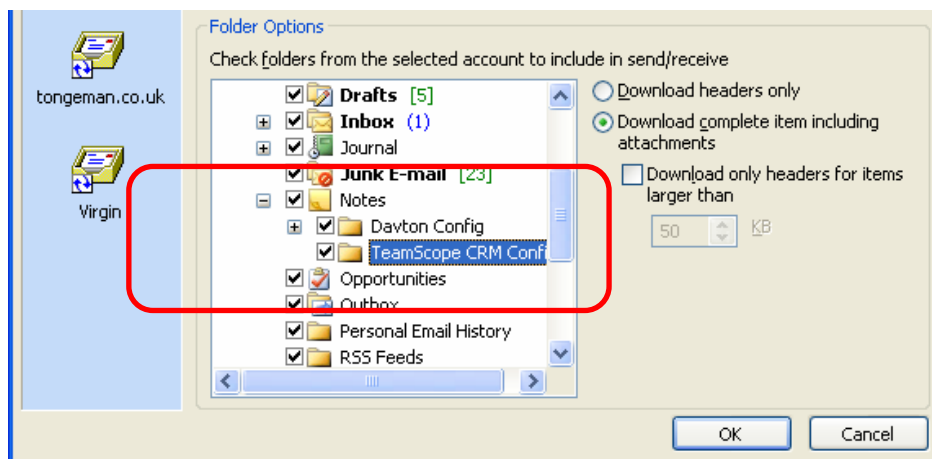


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