OA PROFILE SET UP

Job Aid

For agents wishing to use their native Outlook client to connect to their Allstate-provided email account.

May 29, 2015
Table of Contents
Introduction ............................................................................................................................................................2
Support ...................................................................................................................................................................2
How to Set up your Outlook Profile .......................................................................................................................3

Introduction
This job aid walks users through adding their Outlook account to their local Outlook 2013 client.

Support
For all support issues please call the ATSC at 1-800-336-9400

For training, tutorials, and general help using Microsoft Outlook 2013, see the Microsoft Office Support Center HERE.

Prerequisites
Have your Allstate Agency Gateway ID and password

Have your Allstate NTID @ allstate.com email address(Ex. A123456@allstate.com)

Have an ADR compliant or secure computer
### How to Setup Outlook Anywhere Profile

**Steps**

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<tbody>
<tr>
<td>BEFORE PERFORMING THESE STEPS PLEASE READ THIS JOB AID IN ITS ENTIRETY.</td>
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</table>

It is very critical to follow ALL steps as described. One missed step will prevent you from accessing Outlook Anywhere and will require a call into the ATSC. If you need assistance with configuring Outlook Anywhere, please contact the ATSC @ 800-336-9400

**OUTLOOK ANYWHERE IS OPTIONAL**

You are NOT required to utilize Outlook Anywhere and may continue to utilize Outlook Web Access. Outlook Anywhere is the desktop version of Outlook Web Access and comes with additional features to better manage your email such as: Follow up capabilities, delegate management, and out of office configuration. Outlook Anywhere will not provide PST files or more email storage space.

1) Login to: [https://agencydesktop.allstate.com](https://agencydesktop.allstate.com)

   - Enter your Allstate Agency Gateway ID: Username field (A)
   - Enter your Allstate Agency Gateway Password: (B)
   - Click “Logon” (C)

   **Note:** Use your Allstate Agency Gateway and password

   **NOTE:** EVERYDAY To access Outlook Anywhere you will need to launch agencydesktop.allstate.com EVERYDAY

2) If you have logged in successfully, you will see the following message appear in the upper left of your browser window.

   **NOTE:** Do not proceed to the next step until you have logged in successfully.

   **IMPORTANT:** EVERYDAY You must complete steps 1 and 2 every day you login.

   Your session was established successfully.
### Steps

3) Open the Control Panel using these steps:
   
   **(A)**
   
   a) Right click the Windows button in the lower left of your screen.
   
   b) Click **"Control Panel"** in the list

4) In the search bar in the top right **(A)** type **"Mail"**. Open **"Mail (Microsoft Outlook 2013) (32 bit)"** from the results **(B)**.

5) Click **"Add"** on the General tab. **(A)**

   a) *If you have used Outlook for other email accounts prior to OA setup, please see Alternate Steps 5/6 at the end of this document.*
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<thead>
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| 6) Give the new Profile a name, and click OK. (A)  
Allstate suggests using your full name as the profile name for consistency | ![New Profile](image1) (A) |
| 7) Fill in your full name in the Your Name field: (A)  
Email address (NTID@allstate.com) (B)  
(Must use your NTID@allstate.com email address. (Customer friendly email address is not acceptable)  
Enter your Allstate Agency Gateway Password (C)  
Click Next (D) | ![Add Account](image2) (A) (B) (C) (D) |
| 8) If you are prompted to “Allow this website...” check the box and click Allow.  
**Critical to check box “Don’t ask me about this website again” (A)  
Click on ALLOW. (B)  
NOTE: This window may appear behind another window. Be sure to follow the steps in order to avoid issues. | ![Microsoft Outlook](image3) (A) (B) |
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<td>9) On the Windows Security window, Select “Use another account” (A)</td>
<td><img src="image1.png" alt="Image" /></td>
</tr>
<tr>
<td>10) Enter your credentials using the format AD\Agency Gateway ID. (A) Password will be your Allstate Agency Gateway password. (B) Check the “Remember my credentials” box and click OK. (C)</td>
<td><img src="image2.png" alt="Image" /></td>
</tr>
<tr>
<td>11) You will be prompted for your password a second time. Ensure the username is still AD\Agency Gateway ID (A) Enter your Agency Gateway password (B) Check the “Remember my credentials” box and click OK. (C) If you do not check the box “remember my credentials” you will be asked to enter this information every time you sign on.</td>
<td><img src="image3.png" alt="Image" /></td>
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<td>12) Check the box to “Change account settings” and click Next. (A)</td>
<td><img src="image1" alt="Check box for Change account settings" /></td>
</tr>
<tr>
<td>13) Move the slider all the way to the right until the text changes to All (A)</td>
<td><img src="image2" alt="Slider set to All" /></td>
</tr>
<tr>
<td></td>
<td><img src="image3" alt="Click Finish" /></td>
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Click Finish. (B)
14) Click **OK** on the Mail window. (A)

15) To start Outlook click the Windows button in the bottom left the screen (A)

   Start typing **Outlook** and the search field will appear (B) To open Outlook select Outlook 2013.
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<tr>
<td>16) <strong>Alternate Step 5:</strong> If you have an existing Outlook Profile created, you will see this screen. Click “Email Accounts”.</td>
<td></td>
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<tr>
<td><img src="image" alt="Mail Setup - Default" /></td>
<td></td>
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<tr>
<td>17) <strong>Alternate Step 6:</strong> Click “New”, then continue with Step 7.</td>
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<tr>
<td><img src="image" alt="Account Settings" /></td>
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**SYNCHING UP OUTLOOK:** Depending on how much mail you have, it can take up to 15 minutes for your mail to synch up. You can continue to work while Outlook Anywhere is synching up.

**REMININDER:** Each day, prior to logging onto Outlook Anywhere you will be required to connect to and login to: https://agencydesktop.allstate.com

**AGENCY SUPPORT:** If you need assistance with configuring Outlook Anywhere, please contact the ATSC @ 800-336-9400