

Qvidian Proposal Automation Browser & Word Configuration Guide

This short guide gives setup steps to get your PC or laptop ready for Qvidian use with Chrome or Microsoft Edge browsers. It also includes recommended Word settings. For more comprehensive instructions and information on using other browsers, please visit to the Upland Qvidian Help or contact your SalesEdge Client Services Manager.

 You may need assistance from your IT Department to make these required configuration changes.

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Browser Configuration - Allow Qvidian as Pop-up Block Exception

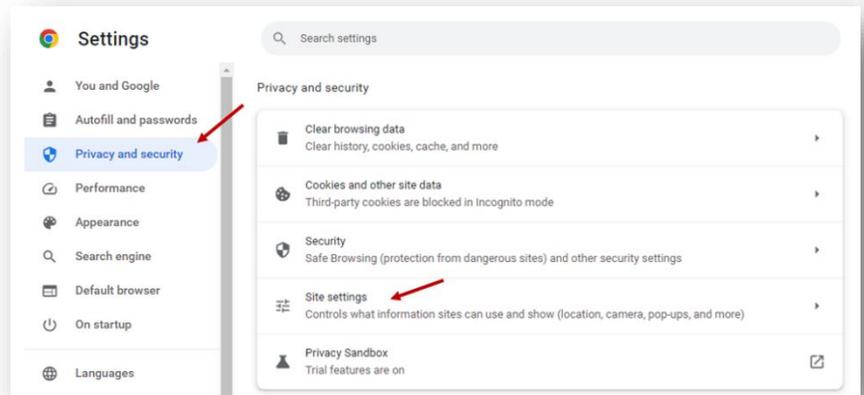
Qvidian is an application that opens new windows and dialog boxes. It is important that your browser allow pop-ups from the Qvidian site.

Chrome

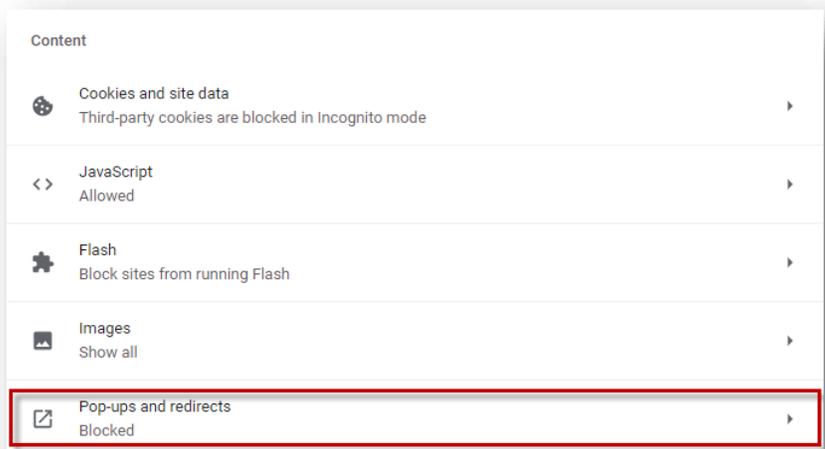
1. Open **Chrome**.
2. In the upper right corner, click the Customize and Control Google Chrome button.



3. Click **Settings**.
4. Click **Privacy and security**.
5. Click **Site Settings**.



6. Scroll to the **Content** group.
7. Click **Popups and redirects**.



8. Scroll to Customized behaviors.
9. Click **Add**.

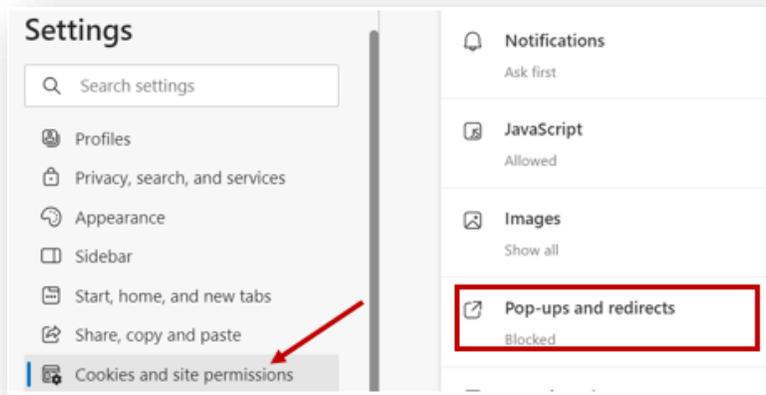


10. Type **[*.]Qvidian.com**
(Enter this as shown with the brackets.)
11. Click **Add**.

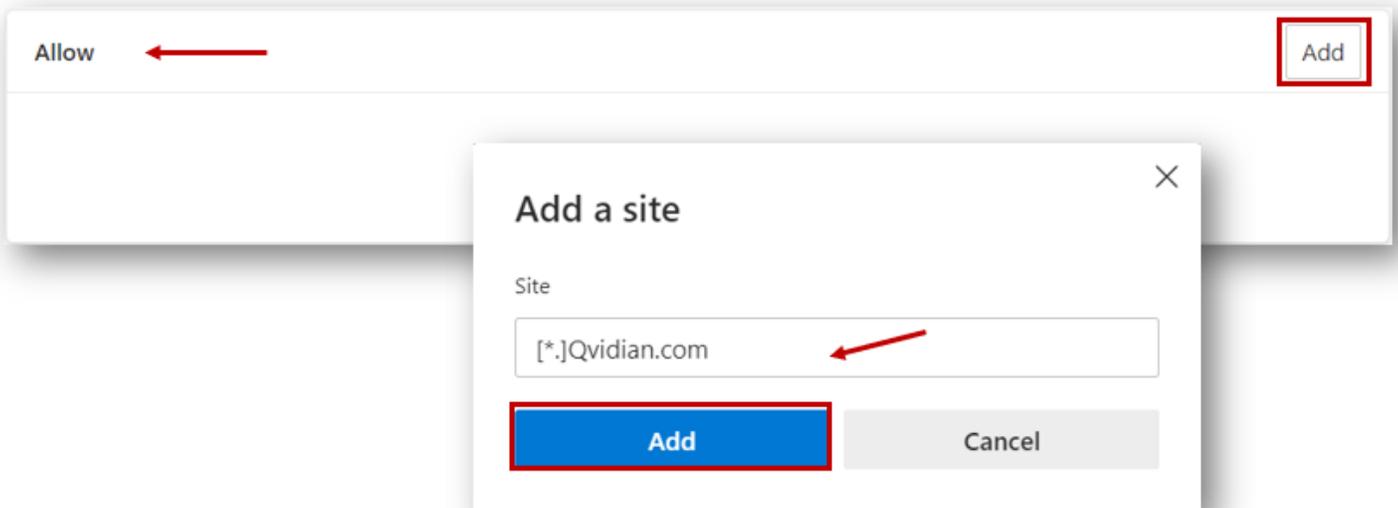


Microsoft Edge

1. Open **Microsoft Edge**.
2. In the upper right corner, click the Settings and more button.
3. Click Settings
4. Click **Cookies and site permissions**.
5. Scroll to Pop-up and redirects.



6. .Click Add next to Allow
7. Type **[*.]Qvidian.com** (Enter this as shown with the brackets.)
8. Click **Add**.

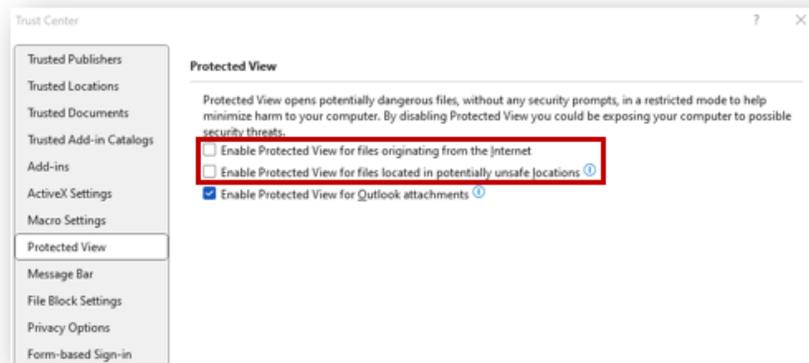


Microsoft Word Configuration

The following Microsoft Word configurations are recommended for all computers on which users will access Qvidian. Qvidian is compatible with Microsoft Office 2019 and 365.

Microsoft Office Word 2019 and 365

1. Select the **File** tab in Word.
2. Click **Options**.
3. Click **Trust Center**.
4. Click **Trust Center Settings**.
5. Click **Protected View**.
 - Disable (uncheck) Enable Protected View for files originating from the Internet.
 - Disable (uncheck) Enable Protected View for files located in potentially unsafe locations.



6. Click **OK** button to close each window.

Stop here if you have not received an email to activate your Qvidian account.
You will continue using this Quick Client Set Up Guide once you receive this email.

Activate your Qvidian Account.

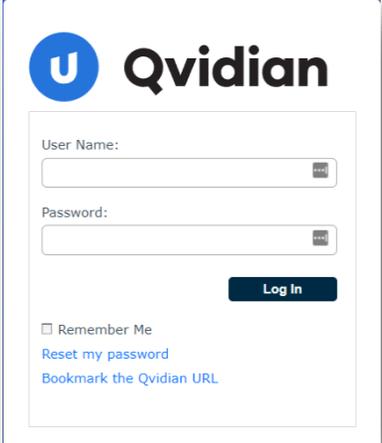
When your user account is created, a Qvidian generated email with a link to create a password, security question and answer, is sent. If you did not receive the email message it may be blocked, or it may have gone into junk mail.

1. **Click the link** in the email.
2. Create a **password**.
3. Create a **security question and answer**.
4. Click **Submit**.

Log in to Qvidian

Once you have created your password, security question and answer, the Log in screen will be presented.

1. Enter your **User Name** and **Password**.
2. Check **Remember me**.
3. Check **Bookmark the Qvidian URL**.
4. Click **Log In**.



The screenshot shows the Qvidian login interface. At the top left is the Qvidian logo, which consists of a blue circle containing a white letter 'U', followed by the word 'Qvidian' in a bold, black, sans-serif font. Below the logo is a white rectangular form with a thin blue border. Inside the form, there are two input fields: the first is labeled 'User Name:' and the second is labeled 'Password:'. To the right of the 'Password:' field is a dark blue button with the text 'Log In' in white. Below the input fields, there are three links: a checkbox followed by 'Remember Me', a blue link 'Reset my password', and another blue link 'Bookmark the Qvidian URL'.