

Best Practices for Quick Deployment of Office 365 Outlook Add-In

Oracle ACX Sales and B2B Service

Deploy the Office 365 Outlook add-in once and enjoy automatic updates with zero maintenance required from your sales team. Get your sales team a seamless Office 365 experience!

With the new Office 365 Outlook add-in, your team can access and complete sales tasks while using Outlook in a browser or on the desktop application.

Once you deploy the Office 365 Outlook add-in, no action is required when Oracle CX Sales updates are delivered. The updates are automatic, there is no maintenance effort required, giving your team a seamless work experience without any interruptions.

Considerations When Getting Ready to Use Office 365 Outlook Add-In

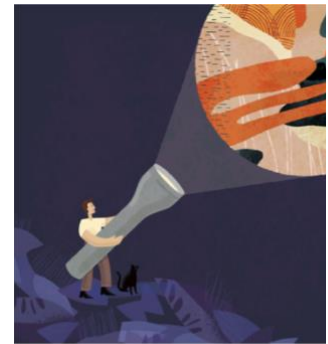
If your team uses Microsoft Internet Explorer for online Office 365, ensure that they do these two things before connecting to the Office 365 Outlook add-in:

- Turn off the compatibility setting: Display intranet sites in Compatibility View.
- Add sites as trusted sites.

For more information, see [Considerations When Getting Ready to Use Office 365](#) in the Implementing Sales guide.

Migrating from Microsoft Outlook to Office 365 Outlook

- If you already use the classic Sales for Outlook client, then depending on the configuration you use, follow the procedure to migrate to Office 365 Outlook. For details, see [Migration from Microsoft Outlook to Office 365](#) in the Implementing Sales guide.



Target audience

- Business Administrator
- Application Administrator
- Business Manager
- Project Manager
- Implementer

More kit components

- [Video](#)
[Do You Know About Office 365 Outlook Add-In?](#)

Quick link to resources

- [Implementation & Management Series](#)
- [Verify Certification Badges](#)
- [Recommended Training for Customers](#)
- [Best Practices Resource Center](#)
- [My Oracle Support \(MOS\)](#)
- [Oracle Help Center](#)

Other Helpful Links

- [System Requirements](#)
- [Oracle University](#)
- [Oracle Partner Finder](#)

Connect with Us

- [Cloud Customer Connect for sales](#)
- [Send us feedback on this guide](#)

Setting Up Office 365 Outlook Add-In

Setting up the Office 365 Outlook Add-In

- Create the Office 365 Outlook add-in in Microsoft Azure Active Directory.
- Generate and download the manifest file.
- Deploy the Office 365 Outlook add-in.

For more information about deploying the Office 365 Outlook add-in, see [Install Office 365 for Sales](#) in the Implementing Sales guide.

Also see [CX Sales Cloud for Office 365 Outlook Add-In Implementation Guidelines and Recommendations \(Doc ID 2698036.1\)](#) available on My Oracle Support.

Settings in the Manage Office 365 task

1. Register the Office 365 Outlook Add-In

- Enter the Application ID, Application Key, and the Name. See [Manage Office 365](#) for more information.

2. Resolve conflicts

- Set up rules for the add-in to resolve potential conflicts in records. See [Manage Office 365](#) for more information.

3. Define Saved Search Used for Synchronization

- Define the search criteria that determines what sales records are synchronized to Outlook.

4. Configure Synchronization Settings Between CX Sales and Office 365 Outlook Add-In

- Enable synchronization of contacts, appointments, and tasks. See [Manage Office 365](#) for more information.
- Define the number of records of contacts, appointments, and tasks to synchronize.

Schedule the following processes to run automatically in the background:

- Office 365 Instant Sync Job
- Office 365 Standard Sync Job
- Office 365 Token Refresh Job

For information about setting up Office 365, see the [Office 365](#) chapter in the Implementing Sales guide.

Configuring Office 365 Outlook Add-In

Configure the Office 365 Outlook Add-In Layout

- Use Application Composer to configure the Office 365 Outlook add-in page layouts for your sales team. For more information about page layout, see the Page Content and Layout chapter in the Configuring and Extending Applications guide.

Timeouts in Office 365 Outlook Add-in

The Office 365 Outlook add-in opens in a side panel in Outlook and requires a sales person to sign in with their CX Sales credentials. For security considerations, the sign-in is designed to time out periodically.

- If for some reason, you need longer sign-in time periods for your sales team, follow the steps documented in [How to Increase Timeout Duration on Office 365 Side Panel \(Doc ID 2659491.1\)](#).

Unidirectional or Bidirectional Synchronization of Outlook Calendar

Sales teams use Outlook Calendar to manage appointments. They also use CX Sales to link appointments to accounts and opportunities. Updates to appointments in CX Sales are synchronized with Outlook and update notifications are sent out to attendees if there are any changes to scheduled appointments.

- Oracle recommends that you enable one-way synchronization to prevent notifications from being sent for changes made to calendar fields of appointments in CX Sales.
- If you want to retain bidirectional synchronization for appointments, see [Old Appointments are Deleted and Cancel Notifications Sent to Appointment Participants from Outlook \(Doc ID 2636331.1\)](#) for actions required to prevent unwanted notifications from being sent for your sales teams' appointments.

Note: The Unidirectional Synchronization capability will be available soon in an Update 20B patch.

Resources

- [Office 365](#) chapter in the Implementing Sales guide
- [Office 365](#) chapter in the Using Sales guide
- [CX Sales Cloud for Office 365 Outlook Add-In Implementation Guidelines and Recommendations \(Doc ID 2698036.1\)](#) available on My Oracle Support

Connect with us

Call +1.800.ORACLE1 or visit [oracle.com](#). Outside North America, find your local office at: [oracle.com/contact](#).

 blogs.oracle.com

 facebook.com/oracle

 twitter.com/oracle

 oracle.com/cx/resources

Copyright © 2019, Oracle and/or its affiliates. All rights reserved. This document is provided for information purposes only, and the contents hereof are subject to change without notice. This document is not warranted to be error-free, nor subject to any other warranties or conditions, whether expressed orally or implied in law, including implied warranties and conditions of merchantability or fitness for a particular purpose. We specifically disclaim any liability with respect to this document, and no contractual obligations are formed either directly or indirectly by this document. This document may not be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without our prior written permission.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group. 0120

Disclaimer: This document is for informational purposes. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, timing, and pricing of any features or functionality described in this document may change and remains at the sole discretion of Oracle Corporation.