

Best Practices for Deploying Office 365 Outlook Add-In

Oracle CX 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:

1. Turn off the compatibility setting: Display intranet sites in Compatibility View.
2. 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 [Migrating 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 Links to Resources

- [Implementation & Management Series](#)
- [Verify Certification Badges](#)
- [Recommended Training for Customers](#)
- [Best Practices Resource Centers](#)
- [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](#)

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

Register the Office 365 Outlook Add-In

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

Resolve conflicts

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

Define Saved Search Used for Synchronization

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

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

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