Oracle Fusion Cloud Sales Automation

How do I implement Microsoft 365 for Oracle Sales Redwood UX?

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F90795-22

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Get Help

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1 Introduction

Overview of Microsoft 365 for Redwood UX

Welcome to the Microsoft 365 Integration for Oracle Sales Redwood User Experience (hereafter called Microsoft 365 for Redwood UX) which consists of the next-generation Microsoft Outlook add-in and sync capabilities.

> **Note:** If you're migrating from the CX Sales for Microsoft 365 integration to the Oracle Sales Redwood UX for Microsoft 365 integration, there are specific steps for the migration. See *Migration Overview* for more information.

Overview of the Redwood UX Add-In

The Redwood UX add-in, known as the Oracle Sales for Outlook add-in, features task-oriented flows to simplify salespeople's daily sales activities. Optimized for Outlook, the intuitive UIs provide 360-degree sales information for meetings and emails, directly in the context of those meetings and emails. Salespeople can share meetings and emails with Sales. Emails are shared as conversation messages.

In addition, salespeople see a daily summary of appointments that they can act on. You can set a default Workspace saved search for each object across the organization, and salespeople can set their preferred saved searches for sync right in the add-in.

See this video on Oracle Cloud Customer Connect to view an introduction to the app: *CX Sales Add-in for Microsoft Outlook*.

Capture Activities Automatically

The integration supports bidirectional sync for appointments, tasks, and contacts, as well as the automatic sync of appointments from Microsoft Exchange to Oracle Sales. Appointments, tasks, and contacts can be synced from Sales to Exchange based on saved searches defined in Oracle Adaptive Search and Workspace. See *Overview of Adaptive Search Setup* in the *How do I configure Adaptive Search?* playbook for more information.

Seamless Email Integration with Microsoft Exchange

With this integration, emails in Microsoft Outlook can be shared directly from the Redwood UX add-in or through the email sync feature. Salespeople can categorize these emails as "Shared with Oracle", with replies automatically synced for seamless tracking and follow-up.

In addition, with the Microsoft Exchange email integration, emails can be sent via Microsoft Exchange directly from the Oracle Redwood web application. The Microsoft Exchange email integration is fully compatible with this integration's email sync functionality and the Redwood UX add-in, ensuring seamless connectivity and an enhanced user experience. Once enabled, this integration allows emails sent from Oracle Sales – such as those related to accounts or opportunities – to be delivered via Microsoft Exchange, with replies automatically synced back to Oracle.

See *Exchange Email Integration for Digital Sales* for more information.

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Task-Oriented Functionality and Insights

The add-in's task-oriented functionality is directly geared to salespeople's day-in-the-life scenarios, in the context of Outlook interactions and interface.

Salespeople begin their day with a daily briefing, right in the add-in. Insights from Sales further help them engage with their customers, easily schedule and prepare for meetings, and review and respond to emails. See the *Use the Add-In* section in this guide for more information.

Improved Sign-In Experience

The add-in provides a better and more secure sign-in experience. Based on your company's policy, the add-in utilizes OAuth, a feature that allows salespeople stay signed in for longer. See *Let Users Stay Signed in to the Add-In* for more information.

Easily Modify and Deploy the Add-In

The add-in comes with predefined layouts to use as-is. If you need to make changes, the predefined layouts can be easily tailored using the Oracle Sales for Outlook configuration tool in Oracle Application Composer. The tool makes it easy to migrate modifications from the earlier CX Sales for Microsoft 365 add-in or from the Oracle CX Sales Mobile application, so that you don't need to manually rebuild your previous modifications. See *How to Migrate Your Existing Customizations* for more information.

Overview of Enabling the Microsoft 365 Integration

You need to follow a few steps to enable the Microsoft 365 Outlook integration.

> **Note:** If you're migrating from the CX Sales for Microsoft 365 integration to the Oracle Sales Redwood UX for Microsoft 365 integration, there are specific steps for the migration. See *Migration Overview* and *Migration Best Practices* for more information.

Before You Begin

Before configuring this integration for your Sales application, carefully review the guidelines here. These guidelines help prevent duplicate data, sync errors, and incorrect configuration settings. Issues with these can impact your users and the production environment.

- **Use separate email accounts for each environment**
  Don't connect the same Microsoft email account to more than one Sales application environment (like development, testing, staging, or production). Doing so can cause data conflicts.
    - Use different test email accounts for each non-production environment. Usually it's only one or two test users for each of the non-production environment.
    - Only use work email accounts with the production environment, including for pilot testing with a group of production users.

- **Be selective about which contacts you sync**
  Avoid syncing "All Contacts" or large saved searches.

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- o Instead, use a smaller, focused group, like a "My Contacts" list.

- o Syncing too many contacts can slow down Outlook. Users might need to manually delete large numbers of contacts, which is cumbersome.

- **Create a separate Azure app for each environment**

  Each Sales application instance needs its own **unique** Microsoft Azure app. This is because the Azure application needs to be set up with redirect URLs that are specific for that Sales application instance.

- **Avoid removing users permanently**

  Only use the "Remove user permanently" action in the Microsoft 365 Sync Monitor if the user's Microsoft 365 account is no longer active, such as when a user leaves the organization.

  - o If you remove an active user and then add them back, it will cause duplicate data if they had previously shared data with Oracle.

Next Step

Once all pre-setup guidelines have been reviewed, proceed to the Prepare for Setup section to begin configuration.

Prepare for Setup

Before you begin, prepare for the installation and roll-out of the Redwood UX add-in for Microsoft Outlook. Check these things first:

1. To complete the setups, you need two users:
   - o A setup user in your Sales application. See *Create Implementation (Setup) Users*.

   - o An administrator user for the Microsoft Azure and Microsoft 365 portals. See *Set Up the Application in Microsoft Azure*.

   Your users need the Download Outlook Installer privilege to use the product. This privilege needs to be added only if the user isn't configured with predefined roles like Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Sales Manager (ORA_ZBS_SALES_MANAGER_JOB), or Sales Representative (ORA_ZBS_SALES_REPRESENTATIVE_JOB).
2. Check that Oracle's Adaptive Search is deployed in the Oracle Sales application and that search indexing processes are run and regularly scheduled. See *Configure Adaptive Search*.
3. Make sure your software meets the prerequisite requirements listed in *What are the system requirements for Microsoft integration?*.
4. If you're using the Microsoft Edge browser, ensure that the browser includes the following trusted sites:
   - o https://*.office.com

   - o The Oracle Sales cloud domain: for example: https://*.oraclecloud.com

High-Level Implementation Steps

> **Note:** You can view a video to get an overview of setting up the Microsoft Azure integration, registering the add-in, adding users, configuring sync settings and viewing sync statuses, reviewing implementation best practices, and more here: *Configuring CX Sales Outlook Add-in* on Oracle Cloud Customer Connect.

Here are the high-level implementation steps to complete the integration:

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Step and Description	Where to Get More Details
Step 1 Set up the Oracle add-in in Microsoft Azure. During the setup, you copy the generated Application ID and Application Key.	• *Set Up the Application in Microsoft Azure*
Step 2 Complete the integration steps in Application Composer. During this setup, you configure the Microsoft application information and generate the Microsoft 365 manifest file. You also review the data synchronization settings and make changes as needed.	• *Set Up the Integration in Application Composer* • *Review and Modify Data Synchronization Settings*
Step 3 Schedule the synchronization processes to ensure they meet your business needs.	• *Run Sync Scheduled Processes*
Step 4 Deploy the add-in and test the integration. This involves setting up user groups in Azure and giving a limited set of users access to the add-in.	• *Deploy the Add-In in Microsoft* • *Test the Integration*
Step 5 Sign in to Microsoft 365 and open Outlook to test the integration and the add-in.	• *Get Started with the Add-In*
Step 6 Configure the add-in, such as the share views for appointment and emails, or layouts for tasks. If you've configured layouts in CX Sales Mobile, or in the Oracle Sales for Microsoft 365 add-in, you can simply import the layouts to this integration.	• *Outlook Add-In Extensible* • *Configure the Summary Page Layout*

To enhance email functionality, consider enabling the Microsoft Exchange email integration in Oracle Sales for Redwood. The integration is fully compatible with the email sync features and the Redwood Outlook add-in, ensuring seamless connectivity and a more streamlined user experience. See *Exchange Email Integration for Digital Sales* for more information.

User Agreement

Here's a copy of the user agreement that you opt in to when enabling the integration.This Oracle-Microsoft integration or add-in might enable you to link to or send your content or third-party content to, or otherwise access, or retrieve content from, Microsoft and its platforms, users, or services. Oracle doesn't control and isn't responsible for Microsoft sites or platforms or services, the performance or availability of the services, or any content received or sent. You bear any and all risks associated with access to and use of Microsoft sites, platforms, and services and are solely responsible for entering into and compliance with separate terms between you and Microsoft. Oracle isn't responsible for the security, protection or confidentiality of such content (including obligations in the Hosting and Delivery Policies and

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Data Processing Agreement and Oracle's Privacy Policy) that's transmitted to such Microsoft sites or platforms or services. You're solely responsible for obtaining or having any required consents or other legal basis for your use of this integration or add-in. Oracle reserves the rights to cancel your connection or integration if your use of this integration or add-in violates the terms of your Agreement(s) with Oracle.

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2 **Get Started**

Set Up the Application in Microsoft Azure

Setting up the application in Microsoft Azure involves these steps:

1. *Sign in to Azure and registering the application*.
2. *Enter a Host Name*.
3. *Add Redirect URIs*.
4. *Specify Client Secret and duration of the secret*.
5. *Add API permissions*.

Sign In and Register

1. As an Azure/Exchange administrator, sign in to the Microsoft Azure portal at `https://portal.azure.com`.

   > **Note:** If you're a first-time user, then you must sign up for your Microsoft Azure Active Directory account.

2. On the homepage of Microsoft Azure, search for `App registrations.`
3. Click **App registrations**.
4. Click the **New registration** tab.
5. On the Register an application page, enter a name for the application.

   The name you enter appears during Azure setup only. It doesn't appear in the add-in.
6. For Supported account types, make sure **Accounts in this organizational directory only (single tenant)** is selected.

   > **Note:** Other options for tenancy:
   > - For single tenant with more than one domain set up, select **Accounts in any organizational directory (Any Azure AD directory - Multitenant)** instead of the single-tenant option.
   > - If you're using multi-tenancy, select **Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts**. See *Use Multi-Tenancy* for more information.

7. Leave the **Redirect URI** blank.
8. Click **Register**.

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9. Back on the Overview page, copy the Application (client) ID and Directory (tenant) ID for later use.

Here's an example of a portion of the App registrations overview page, showing Display name, Application (client) ID, Object ID, Directory (default) ID, and Supported account types:
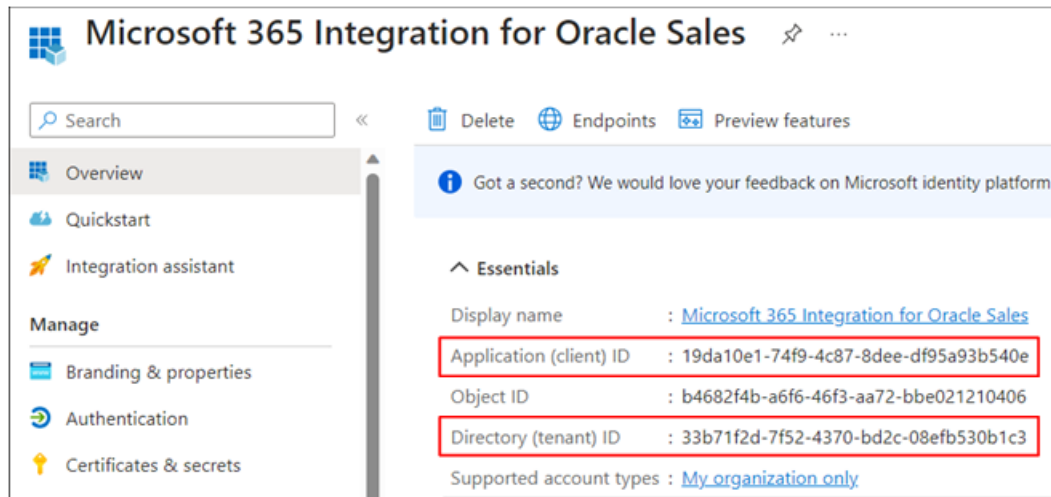
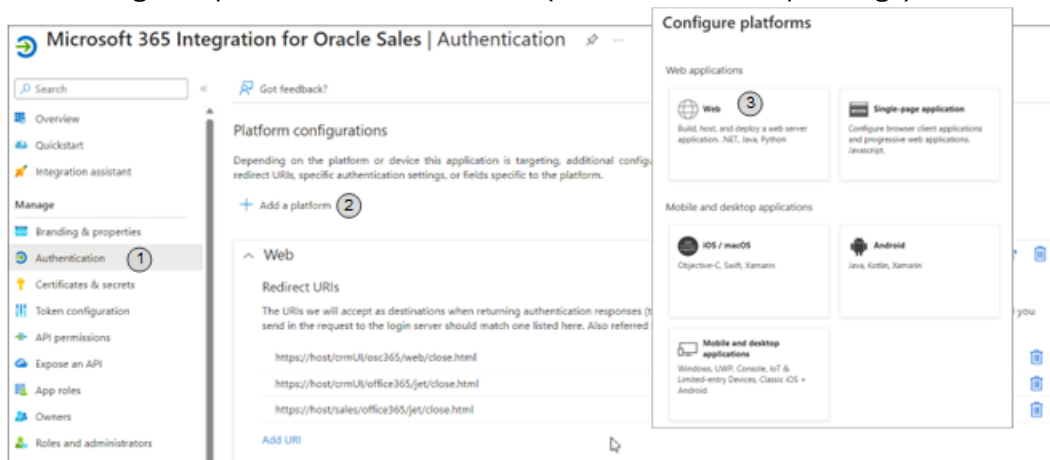# Enter a Host Name

1. Next, in the navigation pane, click **Branding & properties**.

The Branding & properties page shows these fields: Name, Logo, Upload new logo, Home page URL, Terms of service URL, Privacy statement URL, Service management reference, and Internal notes. Here's an example of the menu item and the Branding & properties page:
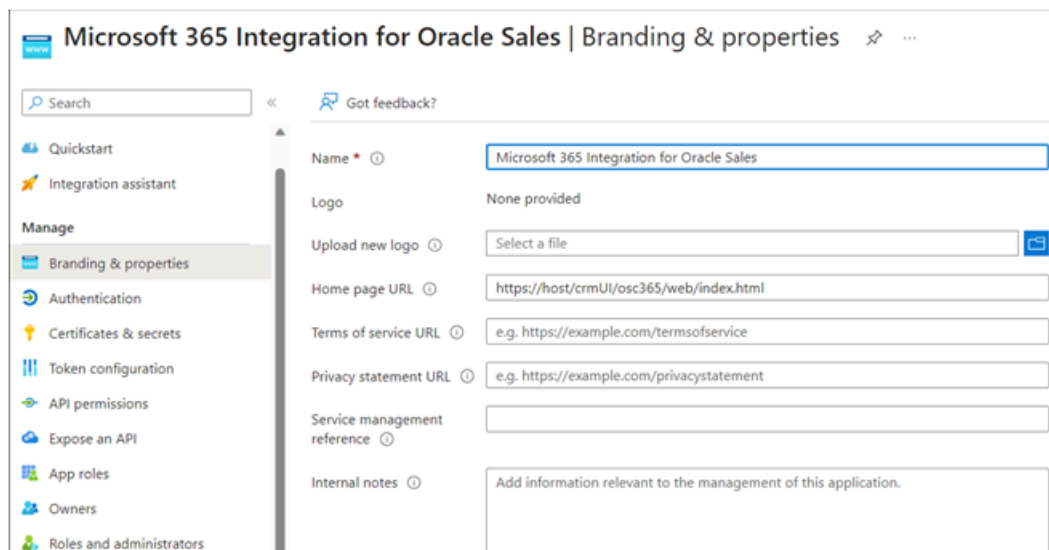
2. In the **Home page URL** field, enter the host name of your Sales environment with this string appended to it:
`https://<Host Name>/crmUI/osc365/web/index.html.`

3. Click **Save**.

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Add Redirect URIs

1. In the navigation pane, click **Authentication** (callout 1 in this sample image).

2. Click **Add a platform** (callout 2 in the image).
3. In the Configure platforms page, click **Web** (callout 3 in the image).
4. In the **Redirect URIs** section of the Configure Web popup window, add the URIs shown in the following table. When done, click **Configure**.

   Note: You need to add each URI separately.

   URI Base Values

URI Base Values	Example URIs
`https://<host>/sales/` `office365/jet/close.html`	`https://sample-pod.oraclecloud.com/sales/office365/jet/close.html`
`https://<host>/crmUI/` `office365/jet/close.html`	`https://sample-pod.oraclecloud.com/crmUI/office365/jet/close.html`
`https://<host>/crmUI/osc365/` `web/close.html`	`https://sample-pod.oraclecloud.com/crmUI/osc365/web/close.html`

Specify Client Secret and Duration

1. In the navigation pane, click **Certificates & secrets**.

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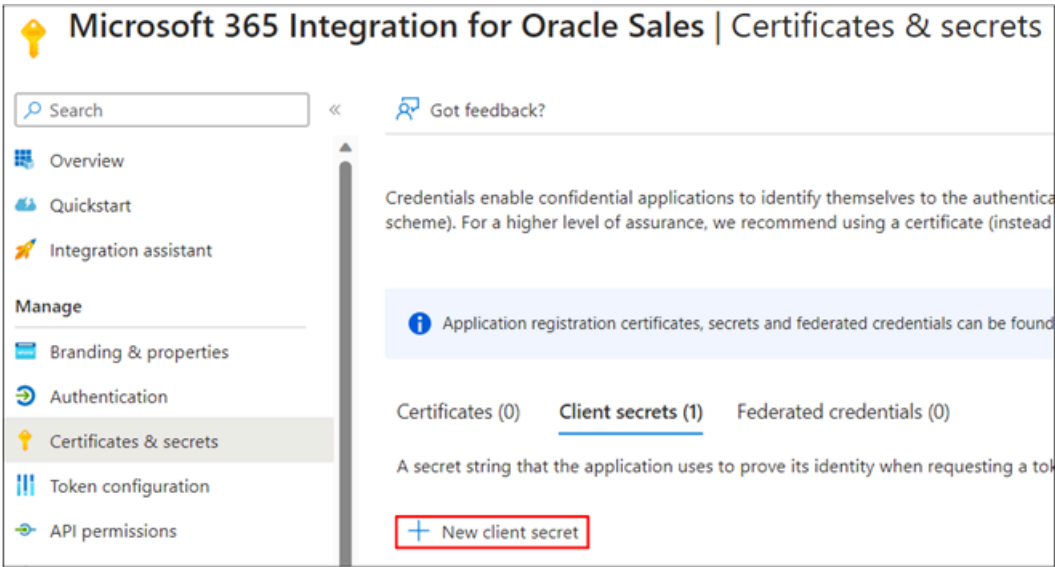2. In the Certificates & secrets page's Client secrets section, click **New client secret**, as shown in this sample

image:

3. In the Add a client secret popup window, enter a description, for example: `Sales client server secret.`
4. Select a duration for the expiration of the client secret. The recommendation is 24 months. See *What should I*

do if the client secret expires? for more details.

If you select **Custom**, enter your start and end dates. These dates need to be in a 24-month time span. After the end date, you must sign in to the client again to start the sync.

> **Note:** If the client secret expires, the sync processes will stop and salespeople won't be able to log into the add-in. You can change this later in the Add-In Registration page.

5. Click **Add**.
6. Copy the generated string from the Value field. This value is the Client Secret value. Note it for later use.
7. Copy the Client Secret Expires Date. Note it for later use.

Add API Permissions

1. In the navigation pane, click **API permissions**.
2. Click **Add a permission**.
3. On the Request API permissions page, on the Microsoft APIs tab, select the **Microsoft Graph** section.
4. Click **Delegated permissions**. Add these permissions:

Permission	Option to Select
Calendars Allows the application to create, read, update, and delete events in user calendars.	Calendars.ReadWrite

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Permission	Option to Select
Contacts Allows the application to create, read, update, and delete user contacts.	Contacts.ReadWrite
MailboxSettings Allows the application to create the Shared with Oracle category.	MailboxSettings.ReadWrite
Mail Allows the application to create, read, update, and delete email in user mailboxes. Doesn't include permission to send mail.	Mail.ReadWrite
Tasks Allows the application to create, read, update, and delete the signed-in user's tasks and task lists, including any shared with the user.	Tasks.ReadWrite

5. Click **Add Permissions**.
6. On the API permissions page, in the Configured permissions section, click **Grant admin consent** to consent on the behalf of users.

Use Multi-Tenancy

If you're operating in multi-tenant environment, use these steps to enable multi-tenancy for the add-in.

Register the Add-In for Multi-Tenancy

Here's how to register the add-in to use multi-tenancy:

1. Go to the *Set Up the Application in Microsoft Azure* topic. We'll use the same steps as in that topic, with some modifications to account for the multi-tenant use case.

   Here's the difference in steps: In Step 6 of *Set Up the Application in Microsoft Azure*, in the section, *Sign In and Register*, instead of selecting the single-tenant option, select **Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts**.
2. Sign in to the Sales application as a setup user.
3. Go to **Navigator** > **Configuration** > **Application Composer**.

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4. Select **Productivity Applications Setup** in the Overview region.
5. Select the **Oracle Sales for Outlook** tab where you can configure the Oracle Sales for Outlook.
6. Download the generated manifest file and share it with all of the subsidiary administrators.
7. Create the application consent URL and provide it to the subsidiary administrators. Here's an example of how to construct the URL:

   `https://login.microsoftonline.com/common/adminconsent?client_id=%3CClientID`

   `%3E&state=12345&redirecturi=https://%3ChostName%3E/sales/office365/jet/close.html&tenant=%3CTenantId%3E`

   See the Get Parameters for the URL section in this topic for details about how to get the parameters to construct the URL.
8. After the subsidiary administrators receive the manifest and consent URL, the subsidiary administrators need to upload the manifest from the Office 365 Admin page at: `https://admin.microsoft.com/Adminportal/Home#/Settings/IntegratedApps` .
9. Next, the subsidiary administrators sign in to Office at: `https://outlook.office.com/owa/`, where they open a new browser tab, run the consent URL provided, and accept the consent.
10. After these steps, subsidiary users will start seeing the add-in in Outlook. They should be able to sign in and use the application.

> **Note:** To decommission a subsidiary, delete all subsidiary users from Oracle Sales.

Get Parameters for the URL

To get the Tenant ID and Client ID needed to construct the URL, go to the Azure portal, as shown in this section. Note that only Azure admins have the privileges to get this information.

Host Name

The hostName is the Oracle Sales cloud instance name.

Tenant ID

Go to: `https://portal.azure.com/#view/Microsoft_AAD_IAM/ActiveDirectoryMenuBlade/%7E/Overview` and locate the Tenant ID.

This image shows an example of where the Tenant ID is: located:

Client ID

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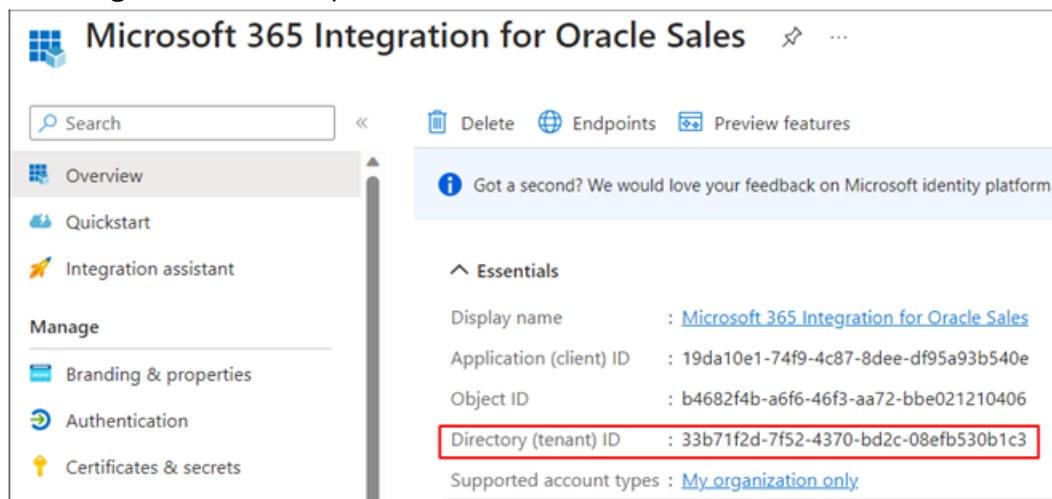
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Navigate to the **App Registration** page and look for the registered application. When you drill down to the application, you can see the Application (client) ID in the Overview section.

Improve the User Experience

You can enable certain features to improve the user experience with the add-in and sync, by letting users continue to use the integration without re-authentication for a longer period of time, based on your company's policy.

To improve the user experience, you: can:

1. *Enable Microsoft Application Permissions so Sync Continues without Re-Authentication*
2. *Let Users Stay Signed in to the Add-In*

Enable Microsoft Application Permissions So Sync Continues without Re-Authentication

When you set up the application in Microsoft Azure, you granted delegated permissions to the APIs required for the integration, such as Calendars.ReadWrite. These API permissions are needed so that sync and the add-in can access users' emails, appointments, contacts, and tasks in Microsoft.

With delegated permissions, when your users' Microsoft token expires (90 days from last sign-in to the add-in), sync doesn't run until the users re-sign in to the add-in.

If you want sync to continue seamlessly without your users needing to sign-in to the add-in every 90 days, then you can add application permissions for certain APIs. The APIs are required for the integration with the application registered in Microsoft Azure.

After you give the additional application permissions to the application in Microsoft Azure, the Microsoft 365 Standard Sync scheduled process uses the permissions to sign in. The add-in, meanwhile, continues to use the existing delegated permissions.

Note: Only administrators can enable the application permissions.

After you give the application permissions, your users have to sign in to the add-in just once before sync starts, and then they don't have to sign in to the add-in again.

Overview of the Setup Steps

To add and enable the application permissions for the add-in:

1. Add the application permissions in Microsoft Azure for the application you created for the Oracle Microsoft 365 add-in.
2. Enable application permissions in the Sales application.
3. Notify your users to sign in to the add-in once.

Add Application Permissions in Microsoft Azure

Note: Don't remove the delegated permissions that already exist from the setup you did in the topic, *Set Up the Application in Microsoft Azure*. Those permissions are still required for the add-in.

1. Sign in to Microsoft Azure.

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2. Open the application you have registered for the Oracle Microsoft 365 add-in.
3. Go to the **API Permissions** tab and click **Add a permission**.
4. Select **Microsoft Graph**.
5. Click **Application Permissions** and add the permissions shown in this table:

Permission	Option to Select
Calendars	Calendars.ReadWrite
Contacts	Contacts.ReadWrite
Mail	Mail.ReadWrite
Mailbox Settings	MailboxSettings.ReadWrite
Tasks	Tasks.ReadWrite

6. Click **Add Permissions**.
7. On the API permissions page, select **Grant admin consent** for each permission you added as consent on behalf of users.

Enable Application Permissions in the Sales Application

1. Navigate to the **Sync Configuration** page. See *How to Get to the Sync Configuration Page* for more information.
2. Under Synchronization Settings, select the **Enable Application Permission** check box.
3. Save the changes.

Configure an Application Access Policy to Secure Your Mailboxes

Theoretically, any accounts using the application with the application permissions granted can gain access to all mailboxes in the Microsoft tenant that the application is for. However, the Oracle-Microsoft 365 sync processes – which uses these application permissions – only uses the permissions to access the mailboxes of those users who have signed in to the add-in. The add-in doesn't use application permissions on the application; it only uses the delegated permissions.

Depending on your company's security requirements, you might want to further restrict this application to only certain users. For this use case, you can configure an application access policy before you enable the application permissions on the application.

> **Note:** Configuring an application access policy is optional and depends on your business' security requirements.

As a Microsoft Azure administrator, configure an application access policy:

1. Create a mail-enabled security group in the Microsoft Exchange admin center.
2. Create an application access policy in Microsoft PowerShell for the security group you created.

   The access policy restricts the scope of mailboxes that the standard sync process can access.

Create a Mail-Enabled Security Group

1. Sign in to the Exchange Admin Center at `https://admin.exchange.microsoft.com/#/`.
2. Navigate to **Groups** > **Mail-enabled security**.
3. Click **Add a group**, as shown in this screenshot:

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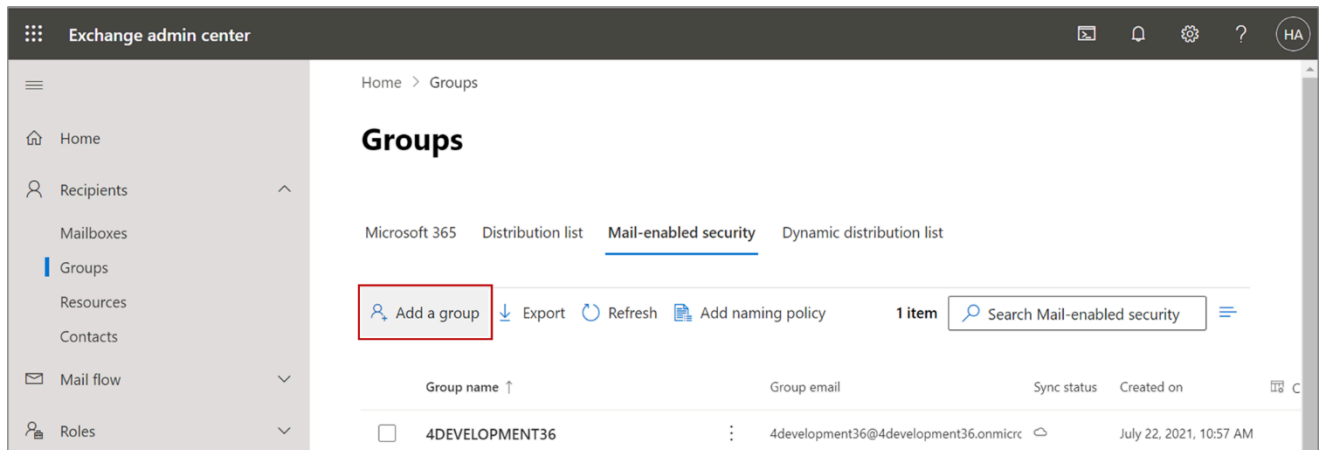
4. In the Group type section, select **Mail-enabled security** and click **Next**, as shown in this screenshot:

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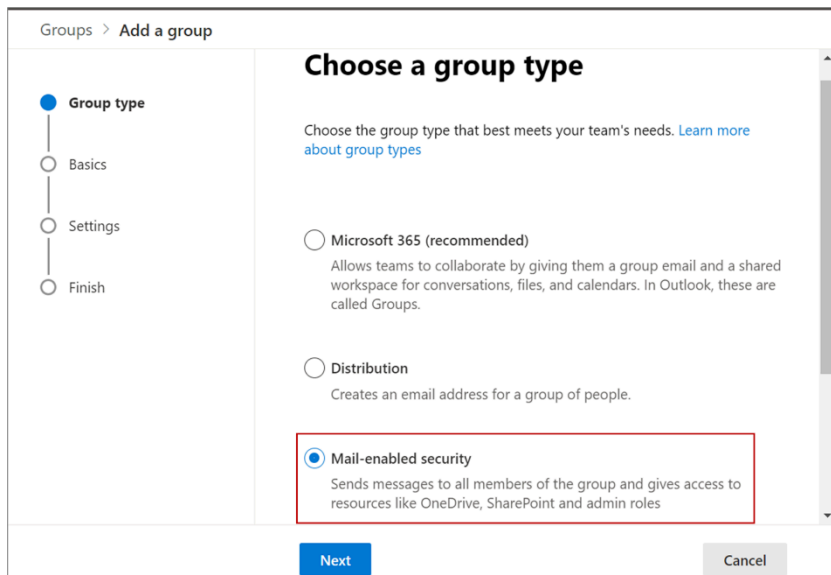
5. In the Set up the basics section, enter a name and description, and click **Next**, as shown in this screenshot:

Groups > **Add a group**

Set up the basics

| Group type |
| Basics |
| Settings |
| Finish |

To get started, fill out some basic info about the group you'd like to create.

Name *

New group

Description

Enter a description for your new group

Back   Next   Cancel

6. In the Settings section, enter the group email address, and configure the following. The image shows the Settings menu, with the Edit settings page active. It also shows two check boxes in the Communication and Approval sections.

   a. **Communication**: Do not select the check box.
   b. **Approval**: Select the **Require owner approval to join the group** check box, as shown in this screenshot:

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7. In the Finish section, verify all the details and click **Create group**, as shown in this screenshot:

Groups > **Add a group**

Group type ✓

Basics ✓

Settings ✓

Finish ●

You're almost there - make sure everything looks right before adding your new group.

Group type
Mail-enabled security
Edit

Basics
Name: Limit Access
Description: None provided
Edit

Settings
Email: fusion1@4development36.onmicrosoft.com
Communication: Disabled
Require owner approval to join the group: No
Edit

Back | Create group | Cancel

8. The mail-enabled security group you created shows up in the Groups list, as shown in this screenshot:

Home > Groups

Groups

Microsoft 365   Distribution list   **Mail-enabled security**   Dynamic distribution list

👤+ Add a group   ⬇ Export   🔄 Refresh   ···   1 item   🔍 Limit Access   ✕   ☰

	Group name ↑		Group email	Sync status	Created on
☐	Limit Access	⋮	limitaccess@4development36.onmicrosoft.c ☁		January 11, 2022, 10:46

9. Next, you need to assign owners and add members to the group. To do that, click the group name.

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10. On the Group Details window, click the **Members** tab.

    a. You're the owner of the group you created. If you want to add more owners, click **View all and manage owners**.

       This screenshot shows the Limit Access window with the Members tab highlighted, along with the View and manage all owners link:
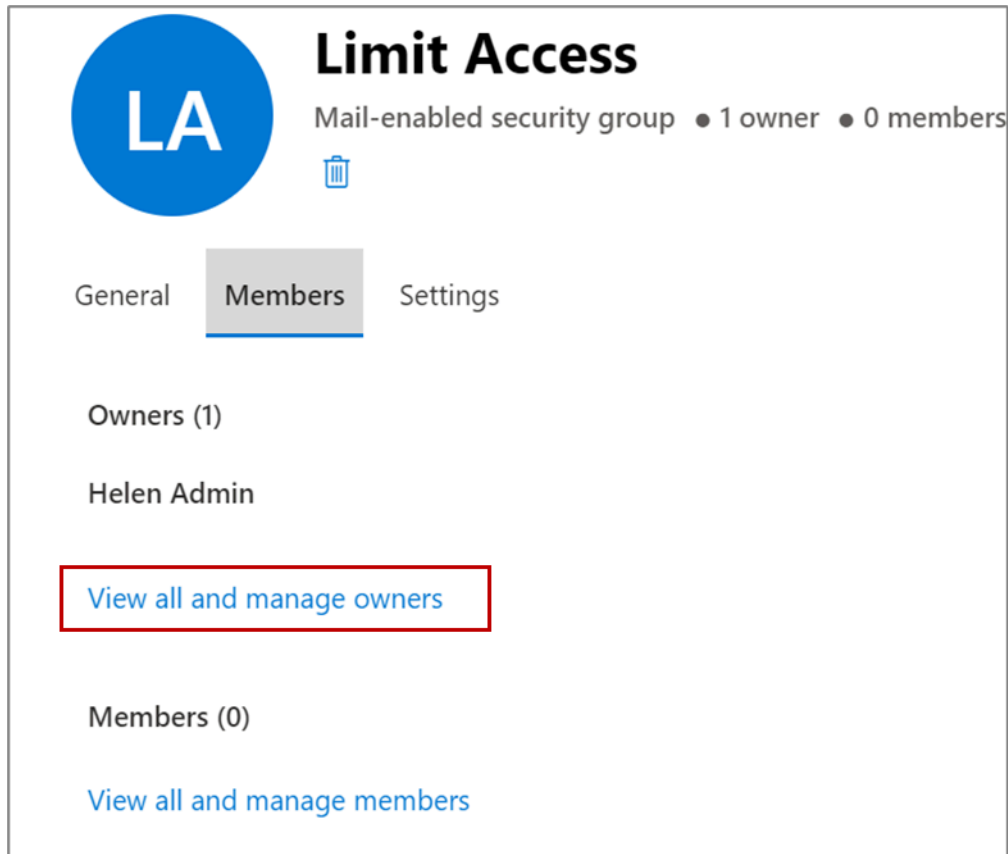
    b. On the Owners page, click **Add owners**, as shown in this screenshot:

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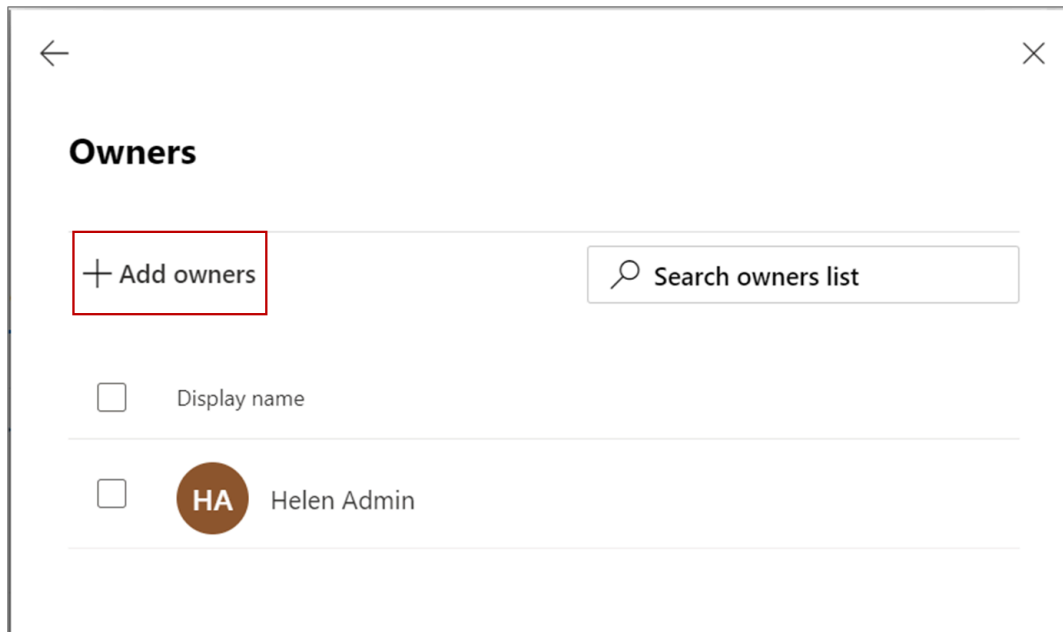
c. Select the group owners from the list and click **Add**, as shown in this screenshot:
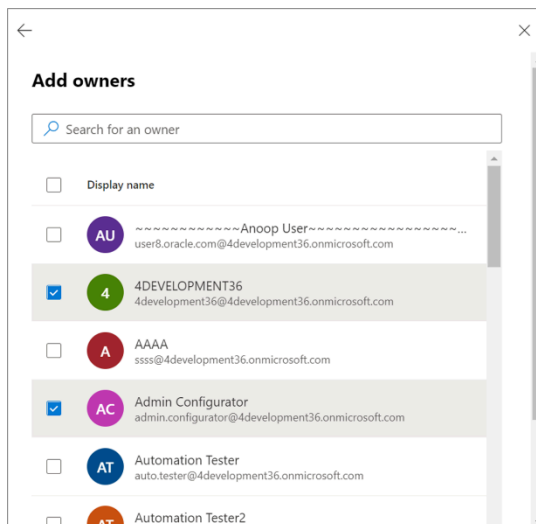
Click the back arrow to go back to the Members tab.

d. Next, to the security group, add users you want to give seamless access to. On the Members tab, click **View all and manage members**, as shown in this screenshot:

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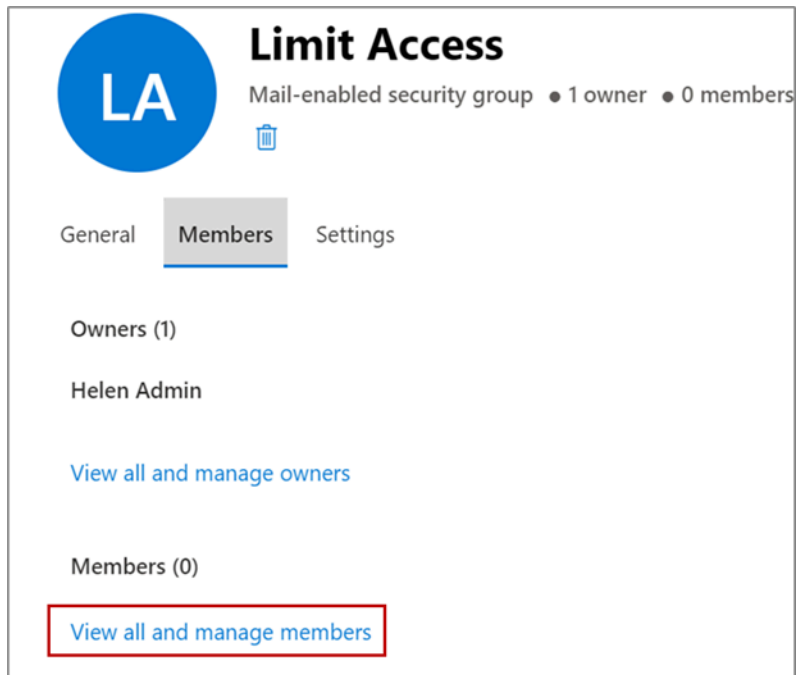
        e. On the Members page, click **Add members**.

        f. Select the members from the list and click **Add**.

        Click the back arrow to go back to the Members tab.

11. Close the group.

    The mail-enabled security group is ready for use.

Create an Application Access Policy

1. Open Windows PowerShell.

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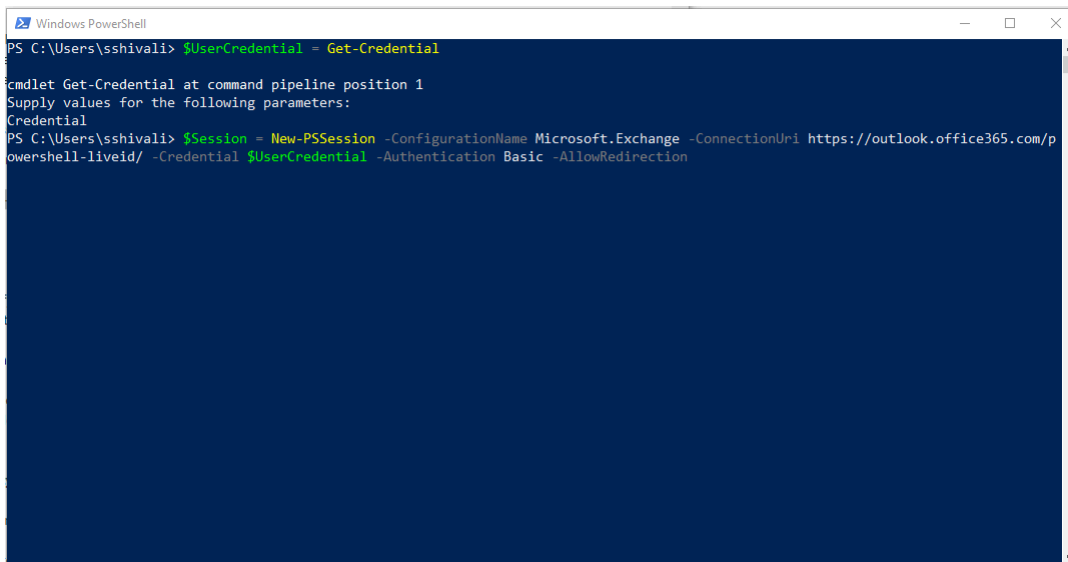
2. Run the following commands in Windows PowerShell.

    o   **`$UserCredential = Get-Credential`**

    On entering the command, a window to enter your Windows PowerShell administrator credentials appears. Enter the administrator credentials, as shown in this sample screenshot:
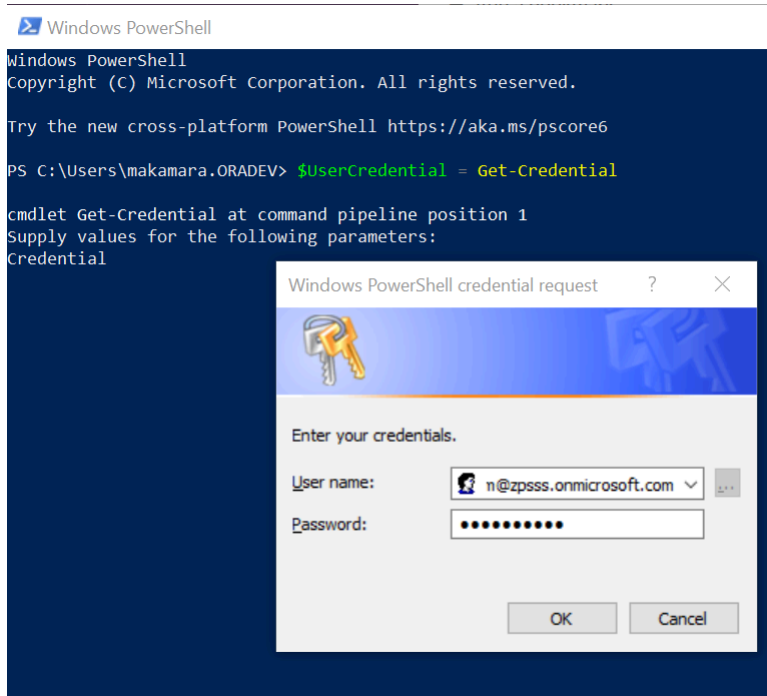
    o   Next, enter the command, `$Session = New-PSSession -ConfigurationName Microsoft.Exchange - ConnectionUri https://outlook.office365.com/powershell-liveid/ -Credential $UserCredential - Authentication Basic -AllowRedirection`, as shown in this sample screenshot:

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You get a prompt to enter your administrator credentials again. Enter them.

o Next, enter the command, `Import-PSSession $Session -DisableNameChecking`, as shown in this sample
   screenshot:.

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3. Identify the application's Application (client) ID and a mail-enabled security group to restrict the access to the application.

   Note: You can get the application's Application (client) ID from Microsoft Azure. Use the mail-enabled security group you just created, by following the steps provided in the section above, Create a Mail-Enabled Security Group.

4. Next, create an application access policy.

   Replace the arguments for **App Id**, Application ID registered with Microsoft Azure, **PolicyScopeGroupId**, the security group email address, and run the following command:

   o `New-ApplicationAccessPolicy -AppId xxxxxxxxxxxxxxxxxxxx -PolicyScopeGroupId xxxxxxxxxxxxxxxxxx -AccessRight RestrictAccess.`, as shown in the following sample screenshot:

   It may take about 30 mins for your changes to be reflected.

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5. Test the newly created application access policy:

Run the following command, replacing the arguments for Identity and App Id. Identity is the user's email address added to the Security Group and AppId is the Application Id registered with Microsoft Azure.

o **Test-ApplicationAccessPolicy -Identity <Identify> -AppId <AppId>**

```
Windows PowerShell                                                                          —  □  ×
Supply values for the following parameters:
Credential
PS C:\Users\sshivali> $Session = New-PSSession -ConfigurationName Microsoft.Exchange -ConnectionUri https://outlook.office365.com/powershell-liveid/ -Credent
ial $UserCredential -Authentication Basic -AllowRedirection
PS C:\Users\sshivali> Import-PSSession $Session -DisableNameChecking

ModuleType Version    Name                          ExportedCommands
---------- -------    ----                          ----------------
Script     1.0        tmp_gmp0wbbk.bhv              {Add-ATPEvaluation, Add-AvailabilityAddressSpace, Add-DistributionGroupMember, Add-MailboxFolde...


PS C:\Users\sshivali> New-ApplicationAccessPolicy -AppId aa22d846-a06a-4fc7-b4b3-7fdaba27c01c -PolicyScopeGroupId 4development36@4development36.onmicrosoft.c
om -AccessRight RestrictAccess


RunspaceId       : 50cfbabc-3ac8-4eec-9b09-95a1a58f61d5
ScopeName        : 4DEVELOPMENT36
ScopeIdentity    : 4DEVELOPMENT3620210722052711
Identity         : 070cdbc8-b611-44bd-952d-aa0bf6af309b\aa22d846-a06a-4fc7-b4b3-7fdaba27c01c:S-1-5-21-2314570782-56128764-747762702-30593805;308ea6f2-d68c-4
                   1ed-9d3d-b1fc231df46e
AppId            : aa22d846-a06a-4fc7-b4b3-7fdaba27c01c
ScopeIdentityRaw : S-1-5-21-2314570782-56128764-747762702-30593805;308ea6f2-d68c-41ed-9d3d-b1fc231df46e
Description      : AppId: aa22d846-a06a-4fc7-b4b3-7fdaba27c01c; ScopeIdentitySid: S-1-5-21-2314570782-56128764-747762702-30593805; ScopeIdentityOid:
                   308ea6f2-d68c-41ed-9d3d-b1fc231df46e; AccessRight: RestrictAccess; ShardType: All
AccessRight      : RestrictAccess
ShardType        : All
IsValid          : True
ObjectState      : Unchanged



PS C:\Users\sshivali> Test-ApplicationAccessPolicy -Identity ███████.oracle.com@4development36.onmicrosoft.com -AppId ███████



RunspaceId        : 50cfbabc-3ac8-4eec-9b09-95a1a58f61d5
AppId             : aa22d846-a06a-4fc7-b4b3-7fdaba27c01c
Mailbox           : sreeharsha.admin
MailboxId         : e7c2d226-acaf-4939-9bb9-8adbcba40fd1
MailboxSid        : S-1-5-21-2314570782-56128764-747762702-19088025
AccessCheckResult : Granted



PS C:\Users\sshivali>
```

Let Users Stay Signed in to the Add-In

You can enable the use of OAuth authentication tokens so that users can remain signed in to the add-in for a longer period of time, based on the company's policy. Not only do OAuth authentication tokens make using the add-in simple, but it's also secure.

Overview of Setup Steps

To set up this feature, you:

1. Register the Microsoft 365 add-in with Oracle Identity Cloud Service (IDCS), by creating a Confidential Application in the Identity Cloud Service console.
2. Associate the Confidential Application details with the add-in, using Setup and Maintenance in Oracle Sales.

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Create a Confidential Application for the Add-In

Here's how you create the add-in as a Confidential Application in Identity Cloud Service:

1. Sign in to My Console in IDCS by navigating to **www.oracle.com** > **View Accounts** > **Sign In** to the cloud.
2. In the menu, in Identity & Security, click **Domains**.
3. On the next screen, the UI might display one of the compartments. If it's not the correct compartment, then select the correct one from the drop-down list. Once you're in the correct compartment, click into the **Domain** for that compartment.
4. Click **Integrated applications** and then click the **Add application** button.
5. On the **Add Application** page, click **Confidential Application** and then launch the workflow.
6. In the Add application details step of the Add Confidential Application wizard, enter information in the Name and Description fields. These fields are used only to identify the Confidential Application in IDCS -- they don't appear outside of IDCS. For example, they don't appear in the Oracle Sales app.
7. Click **Next**.
8. In the **Configure OAuth step**, in Client configuration, click the **Configure this application as a client now** option.
9. In the **Allowed Grant Types** options list, select these options:
    - **Refresh Token**
    - **Authorization Code**
10. Select the **Allow non-HTTPS URLs** option.
11. In the **Redirect URL** field, enter `<host URL>/crmUI/o365nextgen/web/faTokenRedirect.html?authType=oAuth`
12. In Token Issuance Policy, select **Specific for Authorized Resources**, and then select **Add resources**. Click **Add Scope**, in Resources.
13. In the Add scope drawer, search for and select **Oracle Application Cloud (Fusion)** from the list of resources. Click **Add**.

    > **Note:** If Oracle Application Cloud (Fusion) isn't available, then look for `Fusion Applications Cloud Service` instead.

14. Record the Scope value of the resource you added.
15. Click **Next**.
16. In the Configure policy step, select **Skip and do later**.
17. Click **Finish**. The add-in application is added in a deactivated state.
18. Record the Client ID and Client Secret that appear in the General Information section. The Client ID and Client Secret are equivalent to credentials (like a User ID and password combination) that your application uses to communicate with IDCS.
19. At page level, click **Activate**.
20. In the Activate application dialog box, click **Activate application**.

For more information about IDCS, see the *Oracle Identity Cloud Service - Get Started* page on *Oracle Help Center*

Associate the Confidential Application with the Add-In

Here's how you use Setup and Maintenance to associate the Identity Cloud Service Confidential Application with the add-in:

1. In the Sales application, sign in as an administrator. Open the navigator menu, and click **Setup and Maintenance.**
2. In the Setup and Maintenance work area, click the **Tasks** side panel icon and then click the **Search** link.
3. Search for and select the **Manage CX Cloud Mobile OAuth Configuration** task.
4. In the **Identity Cloud Service Host Name** field, enter your Identity Cloud Service host.
5. Select Oracle Sales for Outlook and then add the **Client ID** and the **Client Secret** for the add-in.

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6. Click **Save**.

When OAuth authentication tokens are enabled, the add-in reads the OAuth parameters when the user signs in. The next time the user closes and restarts the add-in, or the current session expires, the add-in prompts them to sign in again. After this second sign-in, the OAuth authentication starts, and from then the user stays signed in to the add-in, as long as they use the add-in at least once during the time validity of the refresh token configured in Oracle Identity Cloud Service.

Set Up the Integration in Application Composer

To complete the setup for the integration, go to Application Composer. You don't need to enter a sandbox.

1. Sign in to the Sales application as a setup user.
2. Navigate to **Configuration** > **Application Composer**.
3. Navigate to **Productivity Applications Configuration** > **Oracle Sales for Outlook**.
4. In the Add-In Registration page, enter a Display Name. This value is the name of the add-in that users see in Outlook.

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5. Next, enter the values that you got from the *Set Up the Application in Microsoft Azure* step:
   - Application (client) ID
   - Client Secret Value: Remember, this is the generated Client Secret Value in Azure; it's not the generated Secret ID.
   - Client Secret Expires: Copy the client secret value expires date in the application in Azure.
   - Directory (tenant) ID
   - Primary Microsoft Domain: You can find this by signing in to Microsoft Azure. Go to the Microsoft Entra ID; this launches the Overview page. Copy the Primary Domain value from the overview page.

   > **Note:** If you have multiple email domains for your tenant, mark the application as **multi-tenant**. To mark it as multi-tenant, go to your Microsoft Azure application and go to App Registrations. Click the app you created. Select Authentication. In Supported Account Types, select **Accounts in any organizational directory (Any Azure AD directory - Multitenant)**.

   This image shows an example of the Add-In Registration page with the fields you need to enter.

6. Save your changes.
7. Download the manifest file: Click the **Download Manifest** button and save the file for later use. You'll use the manifest file in *Deploy the Add-In in Microsoft*.

   > **Note:** If you've changed the add-in Display Name, Application (client) ID, Directory (tenant) ID, or the Primary Microsoft Domain, then you need to re-download the manifest file and re-deploy the add-in to ensure that the new configurations are applied. This is also the case if you migrate your configurations from another environment. See: *Deploy the Add-In in Microsoft*.

8. Click step 2 in the train to continue to set up the data synchronization settings for the integration. See *Review and Modify Data Synchronization Settings* for more information.

What should I do if the client secret expires?

If the client secret expires, the sync process stops working and users won't be able to sign in to the add-in.

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For example, when you set up the application in Microsoft Azure, you set the client secret to expire in 12 months. Twelve months later, the client secret will expire. When this happens, you'll need to generate a new client secret and configure it in Oracle in order for the sync and add-in to continue to work.

If the client secret has expired:

1. For the application with Microsoft Azure, generate a new client secret in the application:
   a. In Microsoft Azure, go to **App Registration** and select the app for this integration.
   b. Go to the **Certificates & secrets** page, **Client secrets** section.
   c. Click **New client secret** to generate a new client secret for the application.
2. Copy the client secret value to the setup page in Application Composer: Navigate to **Configuration** > **Application Composer** > **Productivity Applications Setup** > **Step 1**.

   All users will need to re-sign into the add-in to continue to use the add-in, as well as for the sync to proceed.

> **Note:** Oracle recommends that you update the client secret before it expires, so that users don't need to re-sign in to the add-in and so that there's no disruptions in sync.

Related Topics
- Monitor the Client Secret Expiration

Review and Modify Data Synchronization Settings

As part of your setup, you need to review the data synchronization settings and make changes as needed.

> **Note:** The actual synchronization is accomplished by processes you schedule in a separate step (see *Run Sync Scheduled Processes*). Selecting the options described here only enables the processes to do their jobs.

To review and modify your initial synchronization settings:

1. Sign in to the Sales application as a setup user.
2. Navigate to the **Sync Configuration** page. See *How to Get to the Sync Configuration Page* for more information.
3. On the Sync Configuration page, select the options for appointments, contacts, tasks, and emails. For detailed explanation of these options, see *Overview of the Sync Between Sales and Exchange* and the related sync topics for each of the objects.
4. Save your changes.

This table summarizes the sync areas and their purposes, along with where to find more information:

Setting Region	Setting Name	Description	Where to Get More Details
Synchronization Settings	Allow Users to Override Default Saved Search	Let users select a different default saved search for tasks and contacts to copy Sales records into Exchange.	• *Configure Overall Sync*
	Enable Microsoft Application Permission	Let sync continue without the user having to re-sign into the add-in, after the user's Microsoft token	• *Configure Overall Sync* • **Note:** You must follow the steps in this topic before you

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Setting Region	Setting Name	Description	Where to Get More Details
	Note: Don't remove the delegated permissions that already exist from the setup you did in the topic, *Set Up the Application in Microsoft Azure*. Those permissions are still required for the add-in.	expires 90 days from last sign-in. You must also grant application permissions to the application registered in Microsoft Azure for this setting to work.	enable this setting: *Enable Improved Sign-In Experience with Application Permissions*
	User Notification Frequency for Tokens Expiration	Set the frequency for email notifications that ask users to sign-in to the add-in when their Oracle Sales or Microsoft tokens expire.	See the topic: *Notify Users That Their Sync Stopped Because of Token Expiration*
	Email Notification From Address	Specify the From email address for the email notification sent to users. The default from email address is used when this setting is read-only.	See the topic: *Notify Users That Their Sync Stopped Because of Token Expiration*
	Include Attachments in Sync	Include attachments when syncing appointments, emails, and tasks to Sales.	See the topic: *Configure Overall Sync*
	Conflict Resolution	Set the default preference to resolve conflicting records between Sales and Exchange.	See the topic: *Configure Overall Sync*
	Attachment Size Limit (in MB)	Set maximum size of the attachment, up to 30 MB.	See the topic: *Configure Overall Sync*
	Alternate Microsoft Domains	Record alternate email domains used across your organization.	See: *About Users Who Aren't Part of Sales*
Appointment Sync Settings	Enable Sync	This setting enables overall appointment sync.	See: • *Configure Appointment Sync* • *Auto-Capture Appointments*
	Enable Autocapture Appointments from Exchange	Let sync autocreate appointments in Sales for Exchange meetings that have at least one Sales contact. You can also enable additional options in this section.	See: • *Configure Appointment Sync* • *Autosync Appointments*
	Include Appointments with No Attendees	Let Exchange meetings with no attendees be synced to Sales.	See: • *Configure Appointment Sync* • *Autosync Appointments*
	Include Private Meetings	Let private Exchange meetings be synced to Sales.	See: • *Configure Appointment Sync* • *Autosync Appointments*
	Appointment Sync Limit	Set the maximum number of appointments that can be synced between Sales and Exchange.	See: *Configure Appointment Sync*
	Enable Bidirectional Sync	When enabled, let sync create or update appointments both ways between Sales and Exchange. When disabled, appointments are	See: • *Bidirectional Sync for Appointments* • *Disable Bidirectional Sync*

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Setting Region	Setting Name	Description	Where to Get More Details
		only synced from Exchange to Sales.	
	Default Appointment Saved Search	Records from this appointment saved search are synced from Sales to Exchange. Pick a saved search for the intended roles for the add-in users.	N/A
Email Sync Configuration	Enable Sync	This setting enables overall email sync.	See: *Configure Email Sync*
	Autocapture replies to shared emails	Autocapture replies to emails that were previously shared with Sales.	See: *Configure Email Sync*
Task Sync Settings	Enable Sync	This setting enables overall task sync.	See: *Configure Task Sync*
	Allow Sync to Create Oracle Sales Tasks	Let Exchange tasks with the Shared with Oracle category be created in Sales.	See: *Configure Task Sync*
	Allow Sync to Delete Oracle Sales Tasks	Let sync delete Sales tasks when the corresponding Exchange task is deleted.	See: *Configure Task Sync*
	Default Task Saved Search	Records from this task saved search are synced from Sales to Exchange. Pick a saved search for the intended roles for the add-in users.	See: *Configure Task Sync*
	Task Sync Limit	Set the maximum number of tasks that can be synced between Sales and Exchange.	See: *Configure Task Sync*
Contact Sync Settings	Enable Sync	Enables sync for contacts in general.	See: *Configure Contacts Sync*
	Allow Sync to Create Oracle Sales Contacts	Let Exchange contacts with the Shared with Oracle category be created in Sales.	See: *Configure Contacts Sync*
	Contacts Saved Search	Records from this contact saved search are synced from Sales to Exchange. Pick a saved search for the intended roles for the add-in users.	See: *Configure Contacts Sync*
	Contacts Sync Limit	Set the maximum number of contacts that can be synced between Sales and Exchange.	See: *Configure Contacts Sync*

Run Sync Scheduled Processes

Three processes keep the data in your Sales application synchronized with Microsoft Exchange.

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This table shows the processes:

Process	Description	Recommended Schedule
Microsoft 365 Instant Sync Job	Synchronizes the Exchange activities shared with the Sales application. Appointments are synchronized as appointments and emails are synchronized as conversation messages.	Schedule this to run every 15 minutes.
Microsoft 365 Standard Sync Job	Synchronizes the contacts and activities between Exchange and the Sales application. Emails and appointments shared from the add-in (or through the Shared with Oracle category) while being composed aren't synced until the Microsoft 365 Instant Sync Job runs. This process automatically refreshes the Oracle Sales token for users.	Schedule this to run every 30 minutes.

Note: For your data to be synchronized, you must make sure that synchronization is enabled. See *Review and Modify Data Synchronization Settings*. You should have already completed this setup while enabling the integration.

Other Things to Consider

Here are some other things to consider for the processes:

- If you need to change the frequencies of the Standard Sync and Instant Sync jobs, evaluate the customer environment's configuration before making the changes. Also, consider factors like number of total users and volume of data being synchronized.

- A good approach to determine the optimal frequency is to monitor these jobs for some time and evaluate how long the jobs are taking to complete. Based on the actual time it takes for a job to complete, you can adjust the frequency as needed. For example, if the Standard Sync job instances are consistently completing in 10 minutes, you can change the frequency, say, to 15 minutes. Similarly, you can review the Instant Sync jobs completion time frame as well and make adjustments to the job frequency.

  As you on-board more users for sync, you must monitor the sync duration and reconfigure the sync frequency accordingly.

- Even if these processes run successfully, a user may still get sync errors. As an administrator, you can see these in the sync monitor. For more information, see *Use Microsoft 365 Monitor to Manage Sync and Users*.

Steps to Run the Processes

Here's how to run or schedule the processes:

1. Sign in to the application as a setup user.
2. Navigate to **Tools** > **Scheduled Processes**.
3. Click **Schedule New Process**.
4. In the Schedule New Process dialog window, ensure Job (not Job Set) is selected.
5. Click the drop-down arrow next to the search box and click **Search**.

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6. In the Search and Select: Name dialog window, enter the name of the job you want to schedule or run and click **Search**.
7. Click the name of the job in the search results, and click **OK**.
8. Click **OK** again.
9. To run the job immediately: In the Process Details window, select your options and click **Submit**.
10. To set up a schedule for the job: Click **Advanced Options** and enter a schedule before submitting or saving changes.

Related Topics

- Use Microsoft 365 Monitor to Manage Sync and Users
- Submit Scheduled Processes and Process Sets
- View Status and Other Details for Scheduled Processes

Deploy the Add-In in Microsoft

Deploying the add-in involves setting up user groups in Azure and giving a limited set of users access to the add-in.

Giving access to only a few users lets you test that the add-in is working properly and troubleshoot any issues that arise. Keep in mind that deployment and testing can be an iterative process.

1. Sign in to the Microsoft 365 portal: *https://admin.microsoft.com/*.
2. Select **Settings** > **Integrated apps**.
3. Click **Upload custom apps**.
4. In the Deploy New App page upload apps page:
    a. For App type, select **Office Add-in**.
    b. Select **Upload manifest file (.xml) from device**, click **Choose File** and select the manifest file you downloaded earlier in *Set Up the Integration in Application Composer*.
    c. After you upload the file, click **Next**.
5. On the Add users page:
    a. In Assign users, specify who gets the add-in.
    b. Click **Next**.
6. On the Accept permission requests page, review the permissions and click **Next**.
7. Click **Finish Deployment**.

The application confirms that the deployment is complete and that the add-in appears on the apps page.

It can take several hours for the deployed add-in to appear on a user's Outlook ribbon. Users who are added to the app are automatically assigned the add-in. And, when users are removed, they lose access to the add-in.

Test the Integration

After you've deployed the Outlook add-in to a limited set of users, test the integration. If you want to tailor the add-in layouts, then you must first enter a sandbox. See the *Outlook Add-In Extensible* topic for more details.

Keep in mind that deployment and testing can be an iterative process.

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Note: The add-in won't work if you're using your browser in incognito mode.

1. Sign in to the Sales application as a setup user.
2. Next, sign into the Microsoft Outlook web application or open the Outlook application on your computer.
3. Sign into Outlook.
4. In Outlook, click on an email to preview it.
5. From here, the steps are different depending on whether you're using the web app or the desktop app:
6. If you're in the web app, in the menu bar of the email, click the **More actions** menu (callout 1 in the following image).
7. Select **Oracle Sales for Outlook** from the list (callout 2 in the image).
8. The connection may take a while to establish. Wait for the connection to establish. If the add-in is attempting to connect, you'll see a "working" indicator (callout 3 in the image).
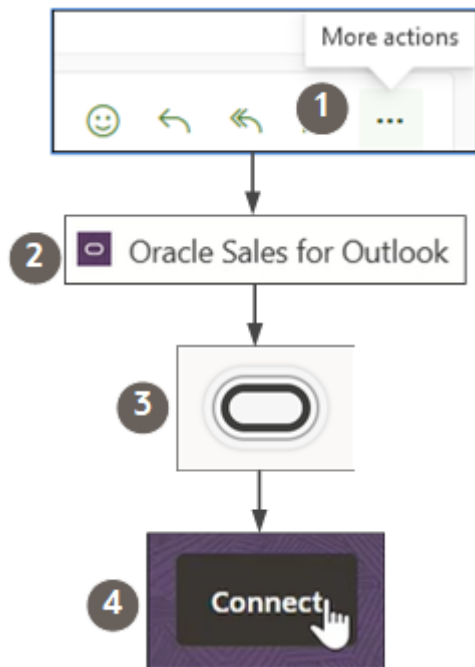
9. Click **Connect** (callout 4 in the image).
10. You're prompted to sign in with your sales credentials to Oracle Sales in a separate browser window.

    Note: If you're not prompted to sign in, then check that you have popups enabled. If opening the add-in from the web, then you must respond to any options to enable popups and to add outlook.office.com as an application mail-to links.

11. Click **Authorize** and if applicable, sign in with your Microsoft 365 credentials.
12. If you're in the desktop app, instead of using the pull-down menu, you'll see the Oracle Sales for Outlook icon in the Outlook ribbon. This image shows an example:

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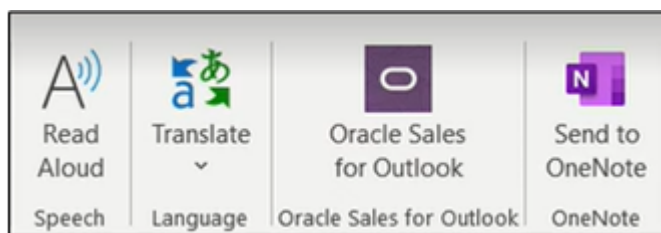
13. The Microsoft user (the user you are currently logged into Outlook with) and the Oracle Sales user you have signed in to the add-in with is now linked. From now on, you must be signed in as the same Microsoft 365 user to view the Sales user's information. The linking prevents you from signing in as another Sales user. You can uncouple the two accounts, however, by following the instructions in the topic *Manage User Mappings*.

For steps you can provide to your users before they open the Outlook add-in for the first time, see *Get Started with the Add-In*.

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Chapter 3
Sync Records

3 Sync Records

Overview of the Sync Between Sales and Exchange

Sync processes keep records current between the Sales application and Microsoft Exchange.

The integration supports records sync for:

- Appointments
- Contacts
- Tasks
- Emails

You use the Sync Configuration page to select the sync options. See *How to Get to the Sync Configuration Page* for steps.

A Few Things to Remember

- Records sync starts after the user signs into the add-in.
- You must schedule the sync processes in a separate step. Selecting the sync options in the Sync Configuration page only tells the processes what to sync. See *Run Sync Scheduled Processes* for more information about scheduling the processes.
- As you set record sync limits, keep in mind that the combination of tasks, appointments, and contacts upper sync limit is 5,000 records.

How Records are Shared between Oracle and Exchange

Appointments

Appointments are synchronized between Exchange and Sales in these cases:

- They're categorized as Shared with Oracle.
- You have enabled autocapture of appointments. See *Configure Appointment Sync* for more information.

  Note: After you enable the autocapture of appointments, appointments are synchronized even without the appointment being categorized as Shared with Oracle.

- Users manually share an appointment from the add-in by clicking the Share button.
- When bidirectional sync is enabled, appointments are shared from Sales to Exchange if they meet the Workspace saved search criteria set by the administrator via the sync configuration page, or when set by the user via the add-in (only if Allow Users to Override Default Saved Search is enabled).

See *Configure Appointment Sync* for more information.

Emails

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Emails are synchronized between Exchange and Sales in these cases:

- They're categorized as Shared with Oracle.

- Users manually share an email from the add-in by clicking the Share button.

- You have enabled the automatic sharing of email responses. See *Automatically Share Email Responses of Manually Shared Emails* for more information.

- When the Microsoft Exchange Email Integration for Digital Sales is configured, emails sent from Digital Sales will be shared with Exchange. See *Microsoft Exchange Email Integration in Oracle Sales* for more information.

See *Configure Email Sync* for more information.

Contacts and Tasks

Contacts and Tasks are synchronized between Exchange and Sales in these cases:

- When they're categorized as Shared with Oracle.

- They're shared from Sales to Exchange if they meet the Workspace saved search criteria set by the administrator via the sync configuration page, or set by the user via the add-in (if Allow Users to Override Default Saved Search is enabled).

For more information, see *Configure Task Sync* and *Configure Contacts Sync*.

How the Shared with Oracle Category Works

The Shared with Oracle category in Outlook lets the sync processes know which Exchange records are being shared with Oracle and which ones need to be shared with Oracle. This image shows an example of the Shared with Oracle item in the UI.
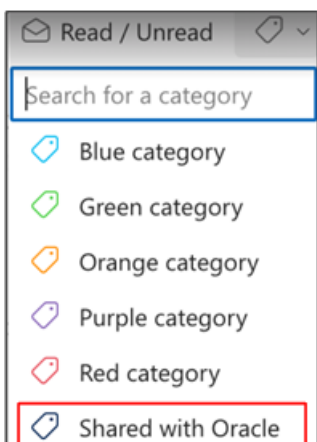
After the add-in has been deployed, the Shared with Oracle category is available for users in Outlook. Keep in mind that after a user categorizes a record as Shared with Oracle, the sync process still needs to run before the records are synced.

When synchronization happens from Sales to Exchange, the Shared with Oracle category is automatically set on each record in Exchange.

Related Topics
- Configure Overall Sync

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How to Get to the Sync Configuration Page

Use the Sync Configuration page to set sync options for Microsoft Exchange and Oracle Sales. Note that you don't need to enter a sandbox for this task.

Here's how to get to the Sync Configuration page:

1. Sign in to the Sales application as a setup user.
2. Outside of a sandbox, navigate to **Configuration** > **Application Composer**.
3. Navigate to **Productivity Applications Setup** > **Oracle Sales for Outlook**.
4. Click the **Sync Configuration** step to get to the Sync Configuration page.

Related Topics
- Configure Overall Sync
- Configure Appointment Sync
- Configure Contacts Sync
- Configure Task Sync
- Configure Email Sync

Configure Overall Sync

Configure sync settings that affect all synced objects for the Microsoft 365 integration for Redwood UX:

1. Navigate to the **Sync Configuration** page. See *How to Get to the Sync Configuration Page* for more information.
2. Under Synchronization Settings, make changes according to your business needs. See the following table for the meanings of the different settings.
3. Save your changes.

Overall Sync Settings

This table shows the settings for sync overall:

Setting	Meaning	Additional Information
Allow Users to Override Default Saved Search	Lets users select different Workspace saved searches, than the default saved searches set in the task and contact sync settings sections, via the add-in. Records that meet the criteria of the user-selected saved searches are synced from Sales to Exchange.	The saved searches that are available are Workspace saved searches.
Enable Microsoft Application Permission	Lets sync continue without the user having to re-sign into the add-in, after the users Microsoft token expires 90 days from last sign-in. You must also grant application permissions to the application registered in Microsoft Azure for this setting to work.	**Note:** You must follow the steps in the following topic before you enable this setting: *Enable Improved Sign-In Experience with Application Permissions*

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Setting	Meaning	Additional Information
User Notification Frequency for Tokens Expiration	Sets the frequency for email notifications that ask users to sign-in to the add-in when their Oracle Sales or Microsoft tokens expire.	See the topic: *Notify Users That Their Sync Stopped Because of Token Expiration*
Email Notification From Address	Lets you specify the From email address for the email notification sent to users. The default from email address is used when this setting is read-only.	See the topic: *Notify Users That Their Sync Stopped Because of Token Expiration*
Include Attachments in Sync	Allows attachments to be included when syncing tasks, appointments, and emails from both Sales to Exchange and Exchange to Sales.	See the Attachment Size Limit setting for the limit when sharing attachments from Exchange to Sales. If sharing attachments from Sales to Exchange, then the limit depends on the object. See the Sharing Appointments with Attachments section in *Configure Appointment Sync* and the Sharing Tasks with Attachments section in *Configure Task Sync* for more information.
Conflict Resolution	Specifies which server wins during records conflict.	• **CX Server Wins**: The values in Sales automatically overwrite the values in Exchange. • **Outlook Client Wins**: The values in Exchange automatically overwrite the values in Sales.
Attachment Size Limit	Sets the maximum size of attachments shared with Sales from Exchange.	The default size limit is 10 MB. The value can be up to 30 MB.
Alternate Microsoft Domains	Lets you record alternate email domains used across your organization.	When sharing emails or appointments to Oracle, recipients or invitees with email addresses in these domains aren't considered as Sales contacts. These recipients are classified in a separate section called Resources for non-Sales contacts in the contacts list.

Related Topics
- Configure Appointment Sync
- Configure Email Sync
- Configure Task Sync
- Configure Contacts Sync
- Run Sync Scheduled Processes

Notify Users That Their Sync Stopped Because of Token Expiration

In the Microsoft 365 for Redwood UX integration, users' Oracle Sales or Microsoft tokens that are required for sync may sometimes expire. You can enable email notifications to these users to let them know that their token has expired and how to fix it.

The email notifies the user to sign in to the Oracle Sales for Outlook add-in so that sync can resume on its next scheduled run.

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> **Note:** In addition to syncing the contacts and activities between Exchange and the Sales application, the Microsoft 365 Standard Sync process automatically refreshes the Oracle Sales token for users.

Here's how to enable the feature:

1. Navigate to the **Sync Configuration** page. See *How to Get to the Sync Configuration Page* for more information.
2. In the Synchronization Settings region, change the User Notification Frequency for Tokens Expiration setting to an option other than None.

    > **Note:** If you're using Microsoft Exchange (configured using the Digital Sales Email Options Enabled profile option), then you must enter a from email address in the Email Notification From Address setting. Otherwise, this setting is read-only and the default From email address is used.

The email notification is sent to the user's Microsoft email address that is used to sign into the Oracle Sales for Outlook add-in. If the user's Microsoft email address has changed after the last successful sign in to the add-in, then the user won't get the email notification, and the user's Microsoft email address needs to be manually updated by the sales administrator using the Update User Credentials action in the Microsoft 365 Monitor.

User Notification Frequency for Tokens Expiration Options

Here are the options for the notification frequency in the User Notification Frequency for Tokens Expiration field:

- None: No email notifications will be sent.
- Only Once: An email notification will be sent to the user only when sync first encounters the user's Microsoft or Oracle Sales token expiration.
- Daily: An email notification is sent once a day until the user signs into the add-in.
- Weekly: An email notification is sent once every week until the user signs into the add-in.

Configure Appointment Sync

You can sync appointments between Microsoft Exchange and Oracle Sales, so that salespeople's appointments in Outlook and Sales are always consistent between the two applications.

> **Note:** See *Appointment Sync Settings* for a list of the sync settings you can configure.

Appointment sync is bidirectional by default. You can modify the behavior using the setting, Enable Bidirectional Sync, When bidirectional sync is enabled, the sync engine syncs appointments between Exchange and Sales.

Here are some points to note about appointment bidirectional sync:

- All Exchange meetings in the past or future that are shared using the add-in, or that are categorized as Shared with Oracle, are synced to Sales. However, only updates in the future in Exchange to already shared meetings are synced back to Sales.
  Remember that external meetings in Exchange can be synced to Sales, but they'll be read-only in Sales. See *Allow Updating of External Appointments* for more information.
- Only future Sales appointments (including already shared ones that have updates) that match the criteria of the saved search specified in the Appointment Sync region on the Sync Configuration page are synced to Exchange and categorized as Shared with Oracle. If an appointment was shared but no longer matches the criteria of the

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saved search, then any updates to it will not be synced to Exchange. However, the appointment will continue to be categorized as Shared with Oracle.

Note that any updates synced to Exchange will automatically generate notification emails to invitees regarding the changes to the meeting. If this isn't what you want the application to do, see *Disable Bidirectional Sync*.

For more information about bidirectional sync, see *Bidirectional Sync for Appointments*.

Appointments and One-Way Sync

To prevent Outlook from sending automatic emails to the invitees, you can set up one-way sync for appointments, by disabling bidirectional sync. In one-way sync, changes made to shared appointments in Outlook are synced to the Sales application, but changes made in the Sales application aren't synced back to shared appointments in Outlook. You disable bidirectional sync by disabling the Enable Bidirectional Sync setting. See *Disable Bidirectional Sync* for more information.

Autocapture Appointments and Sync

If the Autocapture Appointments setting is enabled, the sync looks at all the appointments that meet the criteria for autocapture and syncs those from Exchange to Sales. For more information, see *Auto-Capture Appointments*.

Share Appointments with Attachments

When an appointment is shared, the associated attachments are also shared, if the Include Attachments in Sync setting is enabled on the sync configuration page.

Attachments in an Outlook appointment have a total maximum limit of 150 MB. If an appointment in Sales has attachments with a total of size of more than 150 MB, sync only shares as many attachments as possible – from the smallest to the largest attachment – to meet the 150 MB. The rest of the attachments aren't synced.

> **Note:** If the attachment is synced to Sales, then it will follow the Attachment Size Limit on the sync configuration page. This limit is per attachment.

See *Configure Overall Sync* for more information.

Appointment Sync Settings

Use the appointment sync settings table in this topic and the steps to set up appointment sync.

Steps to Configure Appointment Sync

1. Navigate to the **Sync Configuration** page. See *How to Get to the Sync Configuration Page* for more information.
2. Under Appointment Sync Settings, make changes according to your business needs. See the Appointment Sync Settings table for the meanings of the different settings.
3. Save and close the page.

Appointment Sync Settings

This table shows the appointment sync settings:

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Appointment Sync Settings

Setting	Meaning	Additional Information
Enable Sync	This setting enables overall appointment sync.	N/A
Enable Autocapture Appointments from Exchange	Lets the application create appointments automatically, even if they aren't categorized as Shared with Oracle. This means users don't have to share Outlook meetings manually. The add-in automatically shares the Outlook meetings that have a Sales contact in the recipients list. When all the contacts on the invitee list belong to the same account, the sync engine automatically determines the account and assigns the appointment to the Sales records.	*Auto-Capture Appointments*
Include Appointments with No Attendees	Lets the application create appointments without any invitees. Typically, this happens when salespeople create Outlook meetings to block out time on their calendars. This setting is available only when Autocapture Appointments is enabled.	
Include Private Meetings	Lets the application also create appointments marked as Private in Outlook. This setting is available only when Autocapture Appointments is enabled.	
Appointment Sync Limit	Set the limit for the number of appointments that can be synced.	The combination of tasks, appointments, and contacts upper sync limit can only be a maximum of 5000 records.
Enable Bidirectional Sync	Enables appointments to be synced both ways, between Sales and Outlook. If you deselect this option, the sync engine syncs appointments from Outlook to Sales only and not from Sales to Outlook. When this setting is enabled, note that any appointment that's not included in the default saved search criteria set by the user or the administrator is never synced.	• *Bidirectional Sync for Appointments* • *Disable Bidirectional Sync*
Default Appointment Saved Search	Records from this appointment saved search are synced from Sales to Exchange. Pick a saved search for the intended roles for the add-in users. Select a Workspace saved search accessible by all the intended roles for the add in users. Appointments won't be shared from Oracle to Exchange for users who can't access the Workspace saved search.	The saved searches that are available are Workspace saved searches. Note that users can override the default saved search in the add-in (if you have enabled the Allow Users to Override Default Saved Search option. See *Configure Overall Sync* for more information.

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Autosync Appointments

Let your users' appointments be automatically synced between Microsoft Exchange and Oracle Sales. With autosync enabled, your salespeople don't have to categorize the appointments as Shared with Oracle anymore, for them to be synchronized.

After you enable autosync of appointments, here's what happens:

- The application automatically shares the appointments – including recurring appointments – that have a Sales contact in the recipients list.
- When all the contacts on the appointment invitee list belong to the same account, the sync engine automatically determines the account and assigns the appointment to the appropriate Sales records.

Enable Appointment Autocapture

1. Navigate to the **Sync Configuration** page. See *How to Get to the Sync Configuration Page* for more information.
2. Under **Synchronization Settings** > **Appointments** ensure that **Enable Sync** setting is checked.
3. Enable the **Enable Autocapture Appointments from Exchange** option.
4. Save your changes.

Autosync Private Appointments and Blocked Time

Depending on your organization's preferences, you can let the application autosync private appointments and capture the blocked time of users, as well. See the next two sections for more information.

Sync Private Appointments

You can configure the application to sync private appointments. When you sync private appointments, even appointments that a user has marked as **explicitly private** in Outlook are to Sales. Here's how to enable this feature:

1. Navigate to the **Sync Configuration** page. See *How to Get to the Sync Configuration Page* for more information.
2. In **Synchronization Settings** > **Appointments** ensure that **Enable Sync** setting is checked.
3. Ensure that **Enable Autocapture Appointments from Exchange** is checked.
4. Enable **Include Private Meetings**.
5. Save your changes.

Enable Sync of Blocked Time

Now, let's see how you enable the application to also sync "blocked time" appointments. Blocked times are the appointments that don't have any invitees. Salespeople sometimes create such appointments to block some time on their calendars to complete priority tasks or for other reasons.

1. Navigate to the **Sync Configuration** page. See *How to Get to the Sync Configuration Page* for more information.
2. In **Synchronization Settings** > **Appointments** ensure that **Enable Sync** setting is checked.
3. Ensure that **Autocapture Appointments from Exchange** is checked.
4. Enable **Capture Appointments with Empty Invitee List**.
5. Save your changes.

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Sync Recurring Appointments

Recurring appointments can be shared with Oracle either using the add-in or when they're categorized as Shared with Oracle. However, updating and deleting recurring appointments follows certain rules.

General Tips and Behavior

Read these tips and behavior points to understand more about recurring appointments:

- With appointment one-way sync, any updates or deletions of a shared recurring appointments from Sales aren't synced to Outlook. This is the standard behavior with one-way sync.

- When a user shares a recurring appointment from Outlook, the entire series gets shared -- users can't share individual instances. A recurring appointment that starts in the past but ends in the future is still considered a future appointment.

- The add-in doesn't allow sharing individual occurrences of a series. Users need to open the series to share it or use the Shared with Oracle category for sync to share the series.

- For a recurring appointment series to be synced to Oracle from Exchange, it needs to have an end date. The end date needs to be within the maximum number of recurrences set in the profile option, Maximum Number of Appointment Recurrences (ZMM_ACTIVITY_MAX_RECUR).

Updates to Recurring Appointment Series or Individual Occurrences

This table presents the behavior in Outlook when bidirectional sync is enabled and a shared recurring appointment is updated:

Where Updated	Behavior of the Updates
All updates in Microsoft Exchange	Changes to the series or occurrences sync to Oracle Sales.
Oracle Sales when the series has past and future occurrences	- Changes to the series sync to the series in Microsoft Exchange. - Changes to a future occurrence of the series sync to the occurrence in Microsoft Exchange. - Changes to a past occurrence of the series don't sync to the occurrence in Microsoft Exchange.
Oracle Sales when the series has only future occurrences	Changes to the series or any occurrences sync to the series or occurrences in Microsoft Exchange.
Oracle Sales when the series is completely in the past with no future occurrences	Changes to the series or any occurrences don't sync to the series or occurrences in Microsoft Exchange.

Deletion of a Series of Recurring Appointments

This table presents the behavior in Outlook when bidirectional sync is enabled and the entire series of shared recurring appointments are deleted from Sales:

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Where Created	Series Has Start Date in the Past and End Date in Past or Future	Series Has Start Date in Future
Created in Outlook	The series isn't deleted in Outlook and the Shared with Oracle category is removed.	The series isn't deleted in Outlook and the Shared with Oracle category is removed.
Created in Sales	The series isn't deleted in Outlook and the Shared with Oracle category is removed.	The series is deleted in Outlook.

Deletion of an Individual Occurrence in Series of Recurring Appointments

This table presents the behavior in Outlook when bidirectional sync is enabled and an individual occurrence of a recurring appointment is deleted from Sales:

Where Created	The Deleted Individual Occurrence Is in the Past	The Deleted Individual Occurrence Is in the Future
Created in Outlook	The individual occurrence isn't deleted in Outlook and the Shared with Oracle category still appears.	The individual occurrence isn't deleted in Outlook and the Shared with Oracle category still appears.
Created in Sales	The individual occurrence isn't deleted in Outlook and the Shared with Oracle category still appears.	The individual occurrence is deleted in Outlook. The series it is part of remains the same and shared with Oracle.

Note: If a recurring appointment contains a custom field, only the first instance of the appointment is synced with the Sales application. The custom field needs an object trigger or a field trigger. Use the object workflows to update the custom fields in the recurring appointment.

Do the appointments shared with the Sales application show the account they're related to?

An appointment shared with Sales displays the account name that's associated with the recipient. This table covers the scenarios when the account name is shown for a shared appointment:

Invitee of the Appointment	Shows the Account Name?
The invitee is a Sales contact, associated with an account.	Yes
The invitee is a Sales contact, not associated with any account.	No
The invitees are Sales contacts from the same account.	Yes

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Invitee of the Appointment	Shows the Account Name?
The invitees are Sales contacts. Some of them are from the same account and the others aren't associated with any account.	Yes
The invitees are Sales contacts from different accounts.	No
None of the invitees are associated with any account.	No

Allow Updating of External Appointments

The salespeople who use Microsoft 365 add-in can share external appointments with the sales application. Even though the appointment is external to the company, you might want to let salespeople edit certain details, such as the account, opportunity, and lead.

Remember that the meeting details, such as day, time, description, and location, will still be read-only.

Here's how you can enable updating the external appointments:

1. In the Setup and Maintenance work area, use the **Manage Administrator Profile Values** task:
   - **Offering**: Sales
   - **Functional Area**: Sales Foundation
   - **Task**: Manage Administrator Profile Values
2. On the Manage Administrator Profile Values page, search for **External Appointments Editing Enabled** (ORA_ZMM_ENABLE_EXTERNAL_APPT_EDIT) and set the **Site** value to **Yes**.
3. **Save and Close** the page.

Note: External appointments synced from Microsoft 365 should be linked to your sales data to allow for tracking and analytics.

Bidirectional Sync for Appointments

Bidirectional sync is the sync pattern where the current and future appointments are synced between Outlook and Sales. It's the default sync pattern for appointments.

During synchronization, all appointments that users share from Outlook with Sales are categorized as **Shared with Oracle**. This category means that a copy of the appointment has been created in Sales. Depending on your configuration of appointment sync, when a user updates or deletes an appointment in Sales, the changes are synced to Outlook, and vice versa.

In bidirectional sync, the sync looks at all appointments in Sales that match the saved search you specify in the Appointment Sync region, and syncs those.

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> **Note:** Any appointment that's not included in the default saved search criteria set by the user or the administrator is never synced. Past appointments aren't synced from Sales to Outlook.

- All Exchange meetings in the past or future that are shared using the add-in, or that are categorized as Shared with Oracle, are synced to Sales. However, only updates in the future in Exchange to already shared meetings are synced back to Sales.
  - Remember that external meetings in Exchange can be synced to Sales, but they'll be read-only in Sales. See *Allow Updating of External Appointments* for more information

- Only future Sales appointments (including already shared ones that have updates) that match the criteria of the saved search specified in the Appointment Sync region on the Sync Configuration page are synced to Exchange and categorized as Shared with Oracle. If an appointment was shared but no longer matches the criteria of the saved search, then any updates to it will not be synced to Exchange. However, the appointment will continue to be categorized as Shared with Oracle.
  - Note that any updates synced to Exchange will automatically generate notification emails to invitees regarding the changes to the meeting. If this isn't what you want the application to do, see *Disable Bidirectional Sync*.

- Updates in Sales or Exchange for shared meetings in the past aren't synced between Sales and Exchange.

- Deleted appointments in Sales for shared meetings in the past aren't deleted in Exchange, but the Shared with Oracle category is removed.

- Deleted appointments in Exchange for shared meetings in the past aren't deleted in Sales.

- When the Shared with Oracle category is removed from an Exchange meeting in the future, then the meeting is deleted in Sales. However, past meetings aren't deleted in Sales.

Disable Bidirectional Sync

If you're using Outlook as the primary calendar and no appointments are being modified in the Sales calendar, then you might want to disable bidirectional sync. When you use this option, the Outlook calendar changes are only synced to Sales from Exchange, but not from Sales to Exchange.

In one-way sync, changes made to shared appointments in Outlook are synced to the Sales application, but changes made in the Sales application aren't synced back to appointments in Outlook.

Additional Impacts of This Setup

Here are additional impacts of disabling bidirectional sync for appointments:

- You don't need to configure a saved search to sync appointments in Sales with Exchange, since appointments in Sales aren't synced to Exchange.

- Conflict resolution will be reset to Client Wins.

Steps to Disable Bidirectional Sync

Here's how you disable bidirectional sync:

1. Navigate to the **Configure Sync Settings** page. See *How to Get to the Sync Configuration Page* for more information.
2. Under the Appointment Sync Configuration region, unset the **Enable Bidirectional Sync** option.

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3. Save and close the page.

> **Note:** If an appointment contains a custom field, only the first instance of the appointment is synced with the Sales application. For custom or supplied fields that are marked as required and that don't have a field mapping, use object workflows or a defaulting mechanism to supply a placeholder value.

Configure Email Sync

You can synchronize emails between Exchange and Sales, so that salespeople's emails in Outlook and Sales are always consistent between the two applications.

Email sync is always one-way, from Exchange to Sales. When the sync process runs, it looks at all emails in Exchange that are categorized as Shared with Oracle and syncs those.

1. Navigate to the **Sync Configuration** page. See *How to Get to the Sync Configuration Page* for more information.
2. Under Email Sync Settings, make changes according to your business needs. See the following table for the meanings of the different settings.
3. Save and close the page.

Setting	Meaning	Additional Information
Enable Sync	Specify how emails are synced from Exchange to Sales. When enabled, emails with category Shared with Oracle sync from Exchange to Sales as conversational threads.	See: *Overview of the Sync Between Sales and Exchange*
Autocapture replies to shared emails	Lets the replies received by users for previously shared emails be shared automatically with Sales.	See: *Automatically Share Email Responses of Manually Shared Emails*

Related Topics

- Configure Overall Sync
- Configure Appointment Sync
- Configure Task Sync
- Configure Contacts Sync

Emails as Conversations

Salespeople see the emails shared with the sales application as conversations. The forwarded emails, emails sent or received, and the emails in the same thread with the same subject line are saved as conversations.

All the replies to the emails are threaded within the conversations in chronological order, with the most recent email on the top.

Where Can You See the Conversations

Salespeople can see the shared emails that are saved as conversations in the Activities panel of relevant areas like Accounts and Contacts.

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Here's a screenshot of the Activities panel of a sample account that shows recent conversations shared with the application:
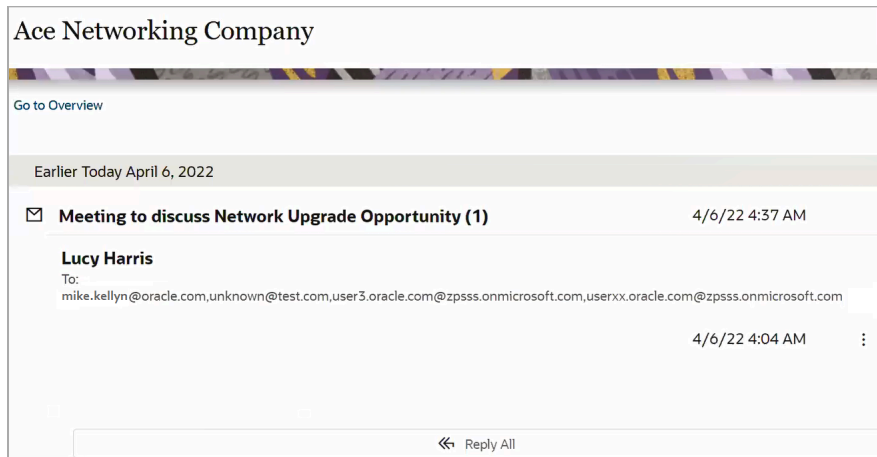
Migrating Past Emails

Migrating the past emails is optional. Consider migrating the emails only if required for custom reporting. Emails previously shared as tasks can be saved as conversations as needed.

Contact Oracle Support to explore options to migrate the past emails using export and import.

Automatically Share Email Responses of Manually Shared Emails

You can configure email sync so that replies received by salespeople for previously shared emails get shared automatically with Sales.

1. Navigate to the **Sync Configuration** page. See *How to Get to the Sync Configuration Page* for more information.
2. Under Email Sync, set the **Autocapture replies to shared emails** option to a yes value.
3. Save your changes.

   Replies that salespeople receive to previously shared emails are automatically shared with the Sales application.

Also consider:

- Any responses to shared emails before this setting is enabled aren't automatically synced. Only responses that come after the setting is enabled are automatically synced.

- If the subject of an email is modified or deleted, Outlook doesn't recognize that email as an in-reply-to email. Such email replies aren't automatically shared in the original email thread that was shared with Sales.

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Configure Task Sync

You can synchronize tasks between Exchange and Sales, so that salespeople's tasks in Outlook and Sales are always consistent between the two applications.

Task sync is always bidirectional.

Additionally:

- When the sync process runs, it looks at all tasks in Exchange that are categorized as Shared with Oracle, and syncs those.
- The sync process looks at all the tasks in Oracle that match the saved search selected for syncing, and syncs those. The saved search criteria is based on the default set either by the administrator or by the end user, depending on whether you have allowed the users to override the default saved search settings.

Sharing Tasks with Attachments

When a task is shared, the associated attachments are also shared, if the Include Attachments in Sync setting is enabled on the sync configuration page. When this setting is enabled, as an attachment syncs, only attachments under the Attachment Size Limit setting on the sync configuration page are synced.

Attachments in an Outlook task have a total maximum limit of 25 MB. If a task in Oracle has attachments with a total of size of more than 25 MB, sync only shares as many attachments as possible – from the smallest to the largest attachment – to meet the 25 MB limit. The rest of the attachments aren't synced.

See *Configure Overall Sync* for more information.

Steps to Configure Task Sync

1. Navigate to the **Sync Configuration** page. See *How to Get to the Sync Configuration Page* for more information.
2. Under Task Sync Configuration, make changes according to your business needs. See the Task Sync Settings table for the meanings of the different settings.
3. Save and close the page.

Task Sync Settings

This table shows the task sync settings:

Task Sync Settings

Setting	Meaning	Additional Information
Enable Sync	Enables task sync in general.	N/A
Allow Sync to Create Oracle Sales Tasks	Lets the sync create tasks in the Sales application that were shared from Outlook.	N/A
Allow Sync to Delete Oracle Sales Tasks	Lets the sync delete tasks in the Sales application that were deleted from Outlook.	N/A
Default Task Saved Search	Specifies the default saved search for tasks.	The saved searches that are available are Workspace saved searches. Note that users can

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Setting	Meaning	Additional Information
	Select a Workspace saved search accessible by all the intended roles for the add in users. Tasks won't be shared from Oracle to Exchange for users who can't access the Workspace saved search.	override the default saved search in the add-in (if you have enabled the Allow Users to Override Default Saved Search option. See *Configure Overall Sync* for more information.
Task Sync Limit	Enter the number of records to be synced in every run of the sync process.	The combination of tasks, appointments, and contacts upper sync limit can only be a maximum of 5000 records.

Related Topics

- Configure Overall Sync
- Configure Appointment Sync
- Configure Email Sync
- Configure Contacts Sync

Configure Contacts Sync

You can synchronize contacts between Outlook and Sales.

Contacts sync is bidirectional.

Additionally:

- When the sync process runs, it looks at all contacts in Exchange that are categorized as Shared with Oracle, and syncs those.
- The sync process looks at all the contacts in Oracle that match the saved search selected for syncing, and syncs those. The saved search criteria is based on the default set either by the administrator or by the end user, depending on whether you have allowed the users to override the default saved search settings.
- When syncing a contact from Exchange, the company value on the Contact in Exchange is used to match to the account in Oracle. If there is a matching account found, then sync associates the contact to that account. If there are multiple matching accounts or if there are no matching accounts, then sync will fail with an error and the contact will not be created in Oracle.
- Changes that are made to synchronized contacts, whether they're made in Outlook or in Sales, are synchronized to the other.
- The contact's email address, first name, and last names are used to determine if the contact already exists. If there is a matching contact based on all three fields, then the contact will not be created. This is to ensure there are no duplicate contacts created.

Steps to Configure Contacts Sync

Here's how to configure contacts sync:

1. Navigate to the **Sync Configuration** page. See *How to Get to the Sync Configuration Page* for more information.
2. Under Contact Sync Settings, make changes according to your business needs. See the following table for the meanings of the different settings.

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3. Save your changes.

Contacts Sync Settings

This table shows the contacts sync settings:

Setting	Meaning	Additional Information
Enable Sync	Enables sync for contacts in general.	N/A
Allow Sync to Create Oracle Sales Contacts	Lets the sync create new contacts in Sales that have been shared from Outlook.	N/A
Default Contact Saved Search	Specifies the default Contacts saved search. Select a Workspace saved search accessible by all the intended roles for the add in users. Contacts won't be shared from Oracle to Exchange for users who can't access the Workspace saved search.	The saved searches that are available are Workspace saved searches. Note that users can override the default saved search in the add-in (if you have enabled the Allow Users to Override Default Saved Search option. See *Configure Overall Sync* for more information.
Contact Sync Limit	Specifies the number of records to be synced in every run of the sync process.	The combination of tasks, appointments, and contacts upper sync limit can only be a maximum of 5000 records.

Related Topics

- Configure Overall Sync
- Configure Appointment Sync
- Configure Email Sync
- Configure Task Sync

Use Microsoft 365 Monitor to Manage Sync and Users

Use the Microsoft 365 Monitor to see the sync statuses of all active users of the add-in. In addition to seeing sync statuses, you can control sync activities and manage users.

In the Microsoft 365 Monitor, you can:

- Monitor sync activity
- Change sync activity
- View user sync issues, authorization issues, and more
- Manage users, such as changing user names and email addresses

You click any of the information cards to show details about each card, as described in the sections that follow.

Access the Microsoft 365 Monitor

To access the Microsoft 365 Monitor:

1. Sign in to the Sales application as a setup user.

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2. Outside of a sandbox, navigate to **Configuration** > **Application Composer**.
3. Navigate to **Productivity Applications Configuration** > **Oracle Sales for Outlook**.
4. Click the **Microsoft 365 Monitor** button (available at page-level).

View Summarized Sync Information for Users

The Microsoft 365 Monitor page shows four information cards that show the number of users based on the statuses shown in this table:

Information Card Name	What It Shows
All Users	Shows the number of active users of the add-in.
Expired Authorizations	Shows the number of users who have expired authorization credentials.
Sync Disabled	Shows the number of users whose sync was disabled.
Latest Sync Succeeded	Shows the number of users whose data successfully synced to the sales application in the most recently run sync job.
Latest Sync Failed	Shows the number of users whose has at least 1 sync error in the most recently run sync job.
Outstanding Sync Errors	Shows the number of users who have outstanding sync errors.

See Details About All Users

When you select one of the information cards, the list of users in the table refreshes to show this information for users:

- **Included in Latest Sync**: This column shows a check mark if the user is included in the latest sync that was run, or an X if the user wasn't included.

- **Oracle Sales Authorized**: This column shows a check mark if the user's token were active during the sync.

- **Microsoft Authorized**: This column shows a check mark if the user's Microsoft token were active during the sync.

- **User**: This column shows the user name for the user in the Oracle sales application.

- **Microsoft 365 User**: This column shows the user email address in Microsoft.

- **Last Sync Start**: This column shows the start time of the last sync.

- **Last Sync Duration**: This column shows the total duration of the last sync.

  Note: Total duration includes Microsoft 365 duration, Oracle Sales duration, and also the time taken by any other internal processes.

- **Last Sync Status**: This column shows a check mark if the status succeeded, an X if it didn't, and a blank circle if the information doesn't apply to that user. It also shows a yellow circle icon with an exclamation point if the last sync had a warning.

- **Using Redwood UX**: A check mark in this column means that the user is using the Oracle Sales Redwood UX for Microsoft 365 integration.

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Manage One or More Users

Select the **Actions** drop-down list to perform these actions for a single user or for several users:

- **Suspend Current Sync**: Suspend an ongoing sync for the selected users.
- **Disable Future Sync**: Disable future data sync for the selected users. To resume the sync, select the same users and select **Resume Future Sync** from the Actions menu.
- **Run Full Sync**: Run a full sync for the selected users.
- **Update User Credentials**: Update the Microsoft email ID or user ID in Sales, for example, if the user's name changed.

  > **Note:** Don't use this action to change the mapping of a Sales user to a different email account. Instead, delete the user and then ask the user to sign in again using the new email account.

  See *Manage User Mappings* for more information.
- **Export User Details**: Download user details as a .csv file.
- **Remove User Permanently**: Delete a user from the integration when the user leaves your organization and their Microsoft email ID is obsoleted. Note that this doesn't delete the user from the Sales application. See *Manage User Mappings* for more information.

See a User's Details

Click a user name in the table to go to the user details page. Here's what the page shows:

User Sync Summary region

The summary region of the page shows:

- **Name**: The user name and email address of the user. The user name is the one stored in Sales and Microsoft. The email is the one stored with Microsoft.
- **Status**: Shows the status for:
  - **Microsoft Authorized**: Shows a check mark if the user's Microsoft credentials or token were active during the sync or an X if the user isn't authorized.
  - **Active**: Shows a check mark if the user is active.
  - **Enable Sync/Sync Disabled**: If you've manually disabled the synchronization for a user, the status appears as Sync Disabled.
- **Conflict Resolution**: Shows the Conflict Resolution settings.

Synchronization History Region

The Synchronization History Region displays details of sync activities for the user, including:

- **Result**: This column shows a check mark if the sync succeeded or an X if the sync failed.
- **Transaction Number**: This column shows the sync process number. Each time the sync runs, it has a different transaction number.
- **Sync Start** and **Sync End**: This column shows the start and end dates and times of the sync.
- **Microsoft 365 Changes**: This column shows the number of records that were changed in Microsoft.
- **Microsoft 365 Duration**: This column shows how long the sync took in Microsoft.
- **CX Sales 365 Changes**: This column shows the number of records synced in Sales.

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- **CX Sales 365 Duration**: This column shows how long the sync took in Sales.
- **Conflicts**: This column shows the number of records with conflicts.
- **Using Redwood UX**: This column shows that the user is using the Oracle Sales Redwood UX for Microsoft 365 integration.
- **Show Sync Error Log**: Use this button to view and export the sync error logs for the user.

Manage a User in the User Details Page

Use the **Actions** menu to manage a user:

- **Disable Future Sync**: Disable future data sync for the selected user. To resume the sync, select the same user and then select **Resume Future Sync** from the Actions menu.
- **Run Full Sync**: Run a full sync for the user.
- **Update User Credentials**: Update the Microsoft email ID or user ID in Sales, for example, if the user's name changed.

  Note: Don't use this action to change the mapping of a Sales user to a different email account. Instead, delete the user and then ask the user to sign in again using the new email account.

  See *Manage User Mappings* for more information.

- **Enable Debug Logs**: Use this option if Oracle Support or another Oracle representative asks you to supply debug logs.
- **Remove User Permanently**: Delete a user from the integration when the user leaves your organization and their Microsoft email ID is obsoleted. Note that this doesn't delete the user from the Sales application. See *Manage User Mappings* for more information.

Monitor the Client Secret Expiration

The client secret date tells the application how long a user's token is good for. If a token isn't valid, the user's sync won't happen. You should monitor the expiration date of the client secret so that your users' syncs don't stop.

How to Set the Client Secret Expires Field

When administrators first set up the application in Application Composer, they set a date for the client secret to expire. Here's how to set the Client Secret Expires field:

1. Sign in to the Sales application as a setup user.
2. Outside of a sandbox, navigate to **Configuration** > **Application Composer**.
3. Navigate to **Productivity Applications Setup** > **Oracle Sales for Outlook**.
4. In the Add-In Registration page, enter a date in the Client Secret Expires field.
5. Save your changes.

Steps to See the Client Expiration Information

Access the Microsoft 365 Monitor to see the date that the Client Secret expires:

1. Sign in to the Sales application as a setup user.
2. Outside of a sandbox, navigate to **Configuration** > **Application Composer**.

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3. Navigate to **Productivity Applications Configuration** > **Oracle Sales for Outlook**.
4. Click the **Microsoft 365 Monitor** button (available at page-level).

The Client Secret shows next to the cards that display in the monitor.

In the Microsoft 365 Monitor, the client secret expiration date is displayed with different colors:

- The date is displayed in red if the expiration date is within the next 15 days or if it has already expired.

- The date is displayed in orange if the expiration date is within 15 to 30 days of expiring.

- The date is displayed in green if the expiration date is more than 30 days from expiration.

Related Topics
- Use Microsoft 365 Monitor to Manage Sync and Users
- What should I do if the client secret expires?

Manage User Mappings

User mappings are critical for a user to sign in to the Outlook add-in. User mappings are combination of a user's Microsoft email ID and the Sales application user ID. If either of these changes, users can experience sign-in issues.

To avoid conflicts, you can update user mappings whenever you're informed about a change in either the Microsoft email ID or the Sales application user ID of a user.

Similarly, if a user is no longer active, you can remove the mapping.

Here's how you can review and update user mappings:

- Open the Microsoft 365 Monitor from the Manage Microsoft 365 page (see *Use Microsoft 365 Monitor to Manage Sync and Users*). You see a list of user mappings. Using the relevant options available, you can update or delete the user mappings shown in the list:
  - **Update User Credentials**: Use this option to correct or update the Microsoft email ID or User ID in Sales, for example, if the user's name changes. To update the value, select the user mapping and select the **Update User Credentials** option from the Actions menu. Make your changes and save.

    Note: Don't use this action to change the mapping of a Sales user to a different email account. Instead, delete the user and then ask the user to sign in again using the new email account.

  - **Remove User Permanently**: When a user leaves your organization, their Microsoft email ID is obsoleted. To delete the mapping, select the user mapping and select the **Remove User Permanently** option from the Actions menu.

    Note that only the user mapping between the Sales application user ID and Microsoft email ID is deleted. The user ID in Sales continues to be active. The next time a new user uses the sales application user ID, their Microsoft email ID is automatically mapped to this sales application user ID.

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Disable Synchronization

When you don't want a continuous synchronization between Sales and Exchange, or when you want to avoid unnecessary sync failures, you can disable the synchronization.

Here's how to disable the sync process:

1. Navigate to the **Sync Configuration** page. See *How to Get to the Sync Configuration Page* for more information.
2. Find the relevant section for the type of record you're disabling.
3. Ensure the **Enable Sync** option has a no value.

For more information, see the related topics in this chapter.

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4 Use the Add-In

Get Started with the Add-In

After salespeople open the add-in for the first time, they can pin it so that it remains visible as they browse their emails. Salespeople can access the add-in from the desktop application or from their web browser. Welcome and tool tip screens help them get started taking advantage of the add-in's features.

Steps to Open the Add-In

Salespeople can open the add-in from either the desktop application or from a web browser.

> **Note:** The add-in won't work if you're using your browser in incognito mode.

1. Navigate to the Microsoft Outlook application on a computer or from a web browser.
2. Sign in to Outlook.
3. In Outlook, click on an email to preview it.

   > **Note:** If you don't select an email, you won't see the add-in in the ribbon.

4. In the Outlook ribbon from the desktop app, click **Oracle Sales for Outlook**, as shown in this sample image:

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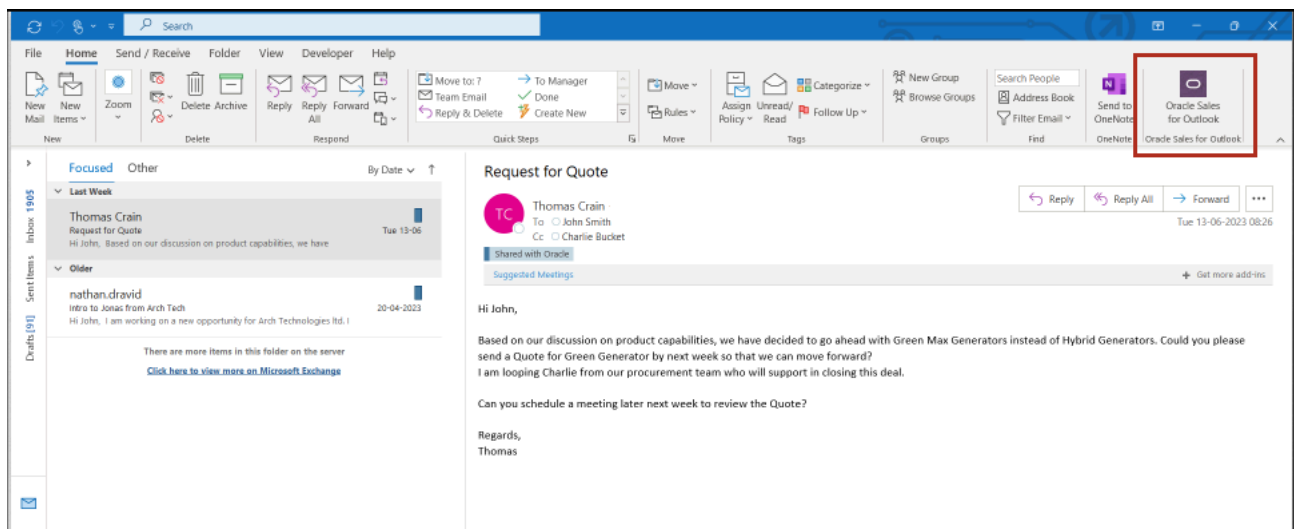
5. If accessing the add-in from the web, click **More actions** (callout 1 in the following image) and then click **Oracle Sales for Outlook** (callout 2):
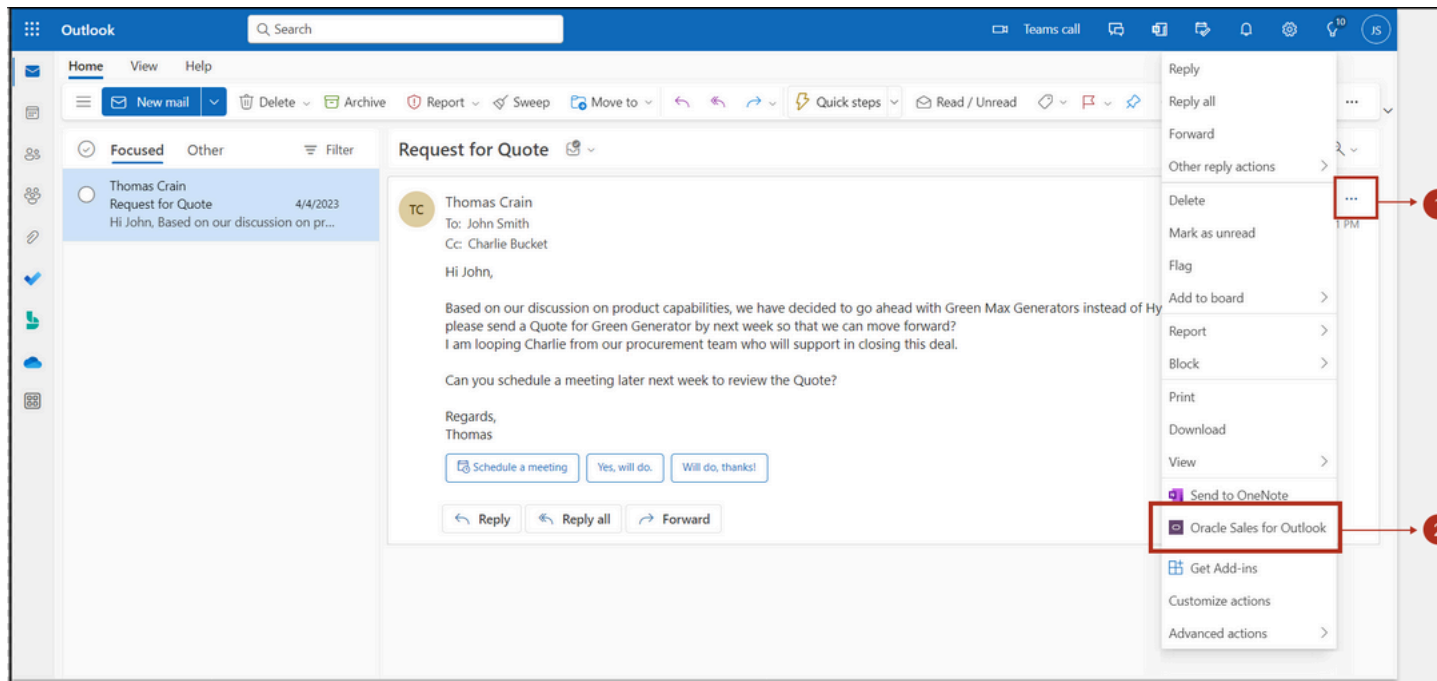
6. The connection might take a while to establish. Wait for the connection to establish. If the add-in is trying to connect, you'll see a "working" indicator.
7. Click **Connect**.
8. You're prompted to sign in with your sales credentials to Oracle Sales in a separate browser window.

   > **Note:** If you're not prompted to sign in, then check that you have popups enabled. If opening the add-in from the web, then you must respond to any options to enable popups and to add `outlook.office.com` as an application mail-to links.

9. Click **Authorize**, and if applicable, sign in with Microsoft 365 credentials.
10. Once the connection establishes, salespeople are ready to start working in the add-in.

View Useful Tips for the First Time

Welcome and tooltip screens help salespeople get started using add-in features. They contain some key insights into capabilities and give salespeople some tips and tutorials to help them get started. For example, tool tips might show information about the features salespeople can access from the home page or provide some details about the available insights. Salespeople can access the welcome and tips and tutorials area from the add-in navigational bar, as shown in this sample image:

Tooltips appear when salespeople start to compose new emails, but they can choose not to display the tip by selecting the **Don't show this again** option.

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Pin the Add-in

After salespeople have viewed the welcome screens for the first time, they're prompted to pin the add-in feature so that it automatically opens each time they begin to browse through their emails. They simply select the pushpin to pin it.

Navigate Around the Add-In

After the integration of Oracle Sales and Oracle Sales for Outlook, salespeople can access cloud data, such as contacts and appointments, through the add-in side panel. Salespeople can also manage synchronization settings for contacts and activities using the add-in side panel.

As long as salespeople have pinned the add-in, they see the add-in home page when they open or preview an email. The add-in displays relevant information about all the known and unknown contacts and resources associated with the email.

Here are the main regions of the add-in panel:

- Home Page
- Insights
- Global Search
- Navigation Bar

Home Page

The home page displays contextual pertinent sales information in the context of the email or appointment salespeople are viewing. Using the information of the sales contacts who are the recipients of the email or appointment, the add-in identifies and displays information about the associated account and its related opportunity or lead.

If no accounts are matched, then salespeople can can select **Account** from the **Add** section and select the relevant records to associate with the email or appointment.

If salespeople drill into records and want to get back to the home page, they can either use the Home icon or the back button. Salespeople can get to the home page from anywhere by clicking on the **Home** icon on the navigation bar, as highlighted in this sample image:

This table explains the callouts in the image that follows it:

Callout	Description
1	If the automatically associated account isn't correct, salespeople can click **Change** from the **Account** section and select the relevant account.

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Callout	Description
2	The add-in automatically identifies email and appointment recipients whose contact information isn't available in Sales. These recipients are displayed in the **Contacts not in Sales** section. To add them as Contacts, salespeople simply click **Create**.
3	If they want to remove any automatically associated opportunities from the account, salespeople click **Remove** from the appropriate Opportunities or Leads sections.
4	To manually associate an email or appointment with an account, opportunity, or lead, salespeople click the relevant account, opportunity, or sales lead buttons in the **Add** section to pick the relevant record from Sales.
5	Once salespeople have identified the relevant records to associate with an email or appointment, they can share it with Sales or create follow-up tasks directly from the home page.

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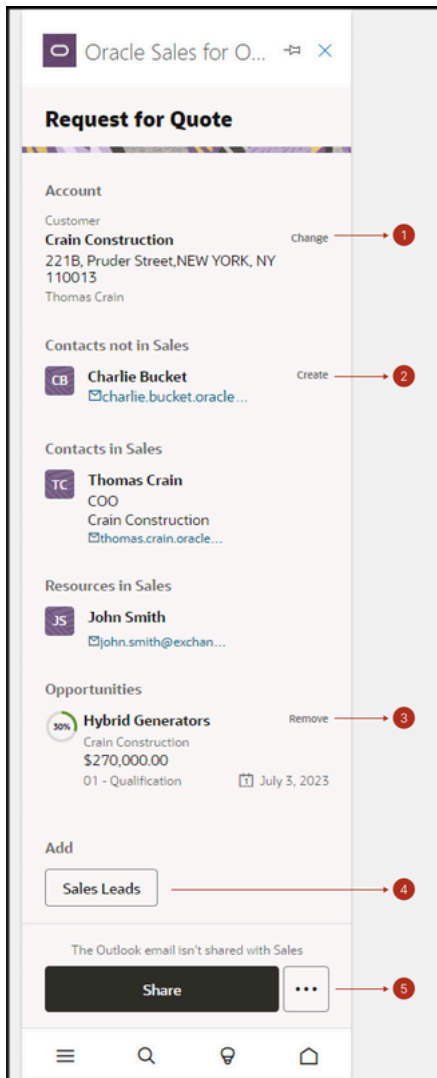
Insights

The Insights page offers salespeople valuable insights into activities that need attention and enables them to keep track of sales activities and log calls with ease. Salespeople can access the Insights page from anywhere by clicking on the **Insights** (bulb icon) on the navigation bar, as highlighted in this sample image:

Here's a sample image of the sales Insights portion of the add-in which contains two sections: Accounts and Tasks.

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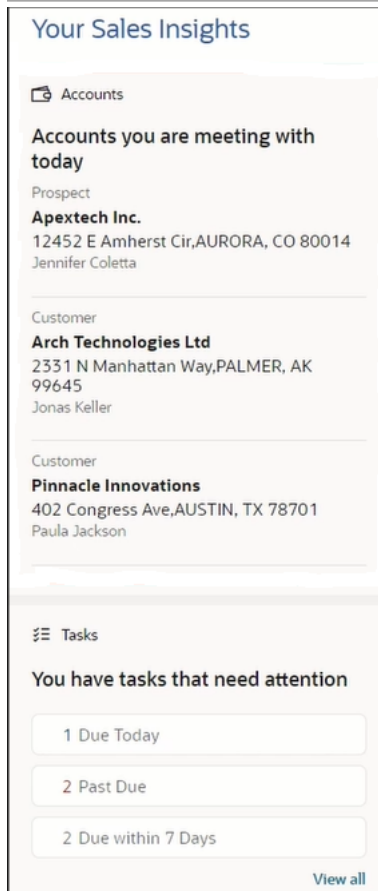
Accounts

The Accounts card on the Insights page lists all the accounts salespeople are scheduled to meet with that day, ordered by their appointments' scheduled times. They can obtain a brief overview of any account by selecting it on the card. If they require more information, they can select **Open in CX Sales** on the account summary page to access the record in Sales through a new browser window.
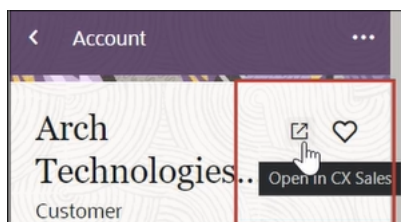
After they've finished all of their appointments for the day, the **Accounts** card shows the accounts salespeople are scheduled to meet with the following day, allowing them to prepare beforehand.

> **Note:** Only accounts for sales appointments that are available in Sales are displayed here.

Tasks

The Tasks card on the Insights page displays all sales tasks that are due the same day, that are past due, or that are due within the next 7 days. Salespeople can click any of the categories to see a list of tasks that require their attention, and

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then they can select any task to view more details. Once they complete a task, they can select a check box to mark the task complete.

To arrange the list of tasks in either ascending or descending order, salespeople can use the **Sort By** feature and select any field available from the task list view. When they reopen the task list later, the same sort preference persists. They can simply click **View all** to view all tasks in the list.

Summary of Calls to Log

The **Calls To Log** card enables salespeople to follow up on the day's meetings with a summary of the calls to log from the Insights page. For example, they can capture notes for the meeting outcome or create follow-up activities. Salespeople have the option to dismiss if no follow-up activity is needed. In addition, they get proactive notifications when a meeting starts. Clicking on the notification opens a page allowing them to take notes on the currently running meeting.
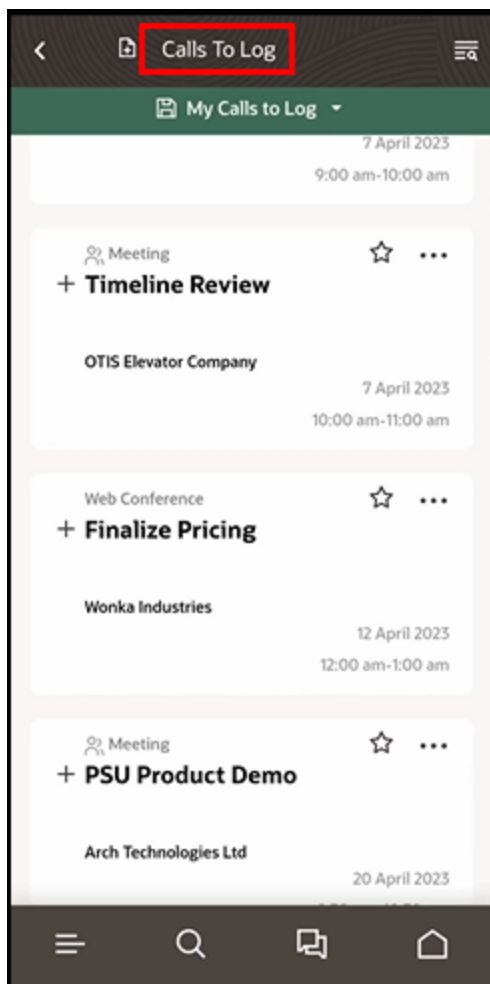
Global Search

The Global Search in the add-in provides powerful search capabilities for easy access to any sales record. Salespeople can quickly search across objects in a single place and view their recently accessed records when they open the Global Search. Salespeople can use multi-keyword search across multiple fields for faster and easier access to desired

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information. Type-ahead shows results as soon as they begin typing. They can also filter results by object types to perform targeted searches.

Salespeople can access the Global Search from anywhere by clicking the **Search** icon on the navigation bar, as highlighted in this sample image:

Navigation Bar

From the navigation bar, salespeople can access the Home, Tips and Tutorials, Insights, and Settings pages. For example, they can view their sync preferences from the **Settings** icon as highlighted in these sample images:
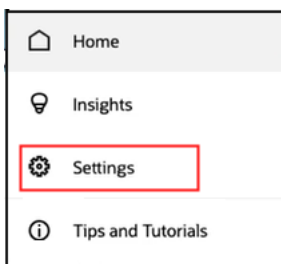
For more details about synchronizing records, see *Overview of the Sync Between Sales and Exchange*.

Do Daily Activities in the Add-In

Salespeople can do a variety of sales-related activities in the add-in.

The add-in provides valuable sales insights and actionable recommendations to help salespeople have informed conversations with their customers and seamlessly capture these interactions, such as:

- Viewing contextual sales information

- Identifying and creating contacts not in Sales

- Capturing interactions

- Creating follow up tasks

- Focusing on sales activities

View Contextual Sales Information

Using the add-in, salespeople can conveniently access sales information from the Home page, such as related accounts, contacts, opportunities, or leads -- for the email or appointment that they are currently viewing, as shown in this sample image:

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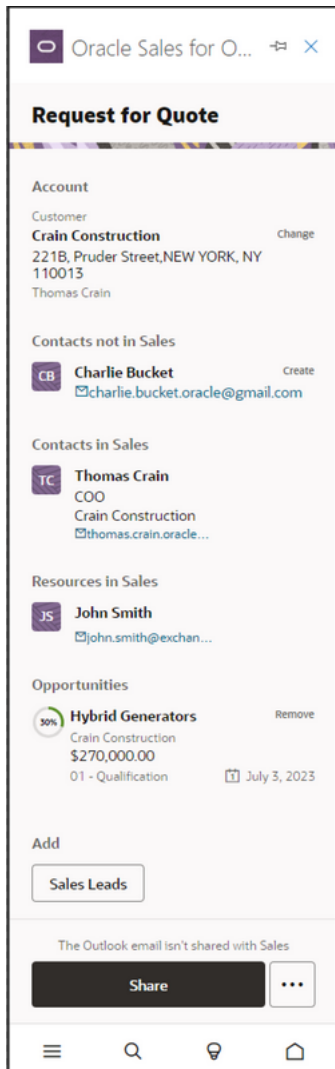
To see a brief overview of an account, salespeople can simply click on the account name located on the Account card. If they require additional information, they can access the account in Sales, in a new browser window, by clicking **Open in CX Sales**, as highlighted in this sample image:

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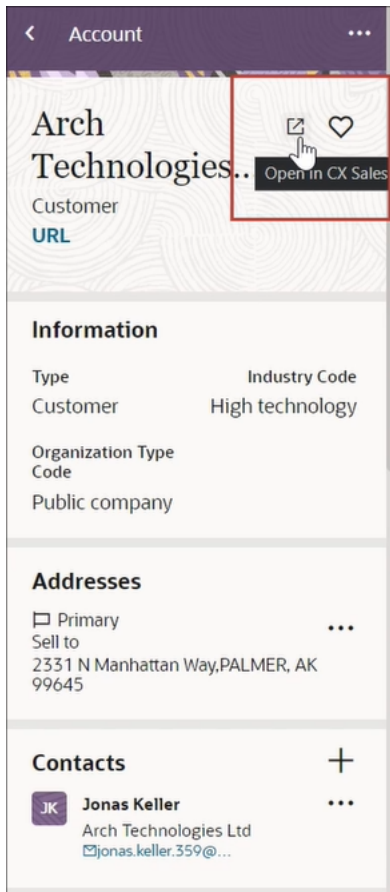
Identify and Create Contacts not in Sales

Salespeople can easily create contacts that aren't currently part of Sales. For example, they note that a contact copied on the email isn't set up in Sales. With just a simple click on the contact name, they can immediately create a contact record for Charlie Bucket, as shown in this sample screenshot:

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Capture Interactions

Interactions are easy to capture. For example, a salesperson receives an email requesting some pricing information and needs to share the email with the appropriate people on the sales team. From the add-in, the salesperson clicks **Share** (as shown in the sample image) to share the email so that it's available to the sales team in the context of the related account, contact, or opportunity.

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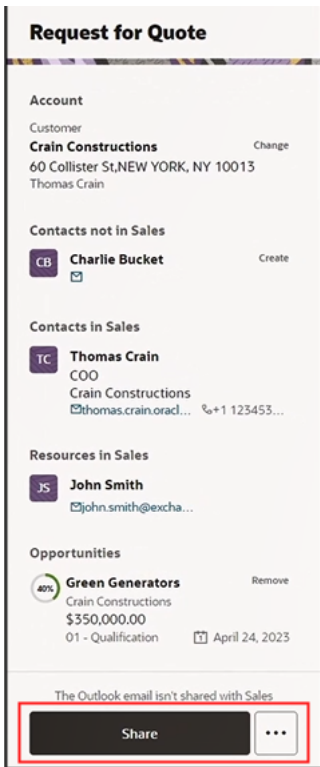
Once saved, the email is shared to the selected relevant salespeople on the team. It becomes available on the immediate sales record and is automatically synced in the activity stream of the sales account. Salespeople can also similarly share any sales meeting with their sales teams.

Salespeople can also share emails and meetings related to a specific account, contact, opportunity, or lead with their team in the Sales application, so that they can give them any relevant information or history related to a customer. Sharing emails and meetings associates the email or meeting as an activity with the relevant account, opportunity, or lead. They can also search for other accounts, opportunities, and leads that they have access to.

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Take a look at these examples to help understand sharing emails and meetings:

- **Share emails**

  Let's say you're a salesperson handling the North American region for laptop sales. You're in conversations with a customer on their requirements for your new range of laptops.

  You have just received an email requesting a quote from the customer. You would like to associate this email with an existing opportunity in your sales application so that you can share it with your manager and other salespeople on your team.

  Open the email to view the side panel. Click **Share** as highlighted in the sample screenshot.
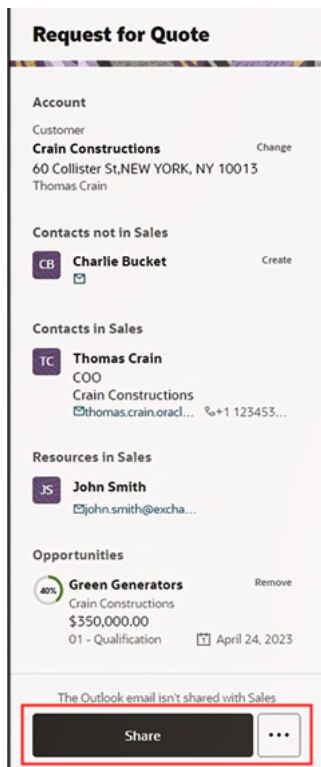
  On the Share Email page, search for and select the relevant opportunity, and click **Save**. You have now saved your email in your sales application for the selected opportunity, making it available for your team to review. When salespeople open the opportunity, they can now view this email as an activity associated with the opportunity.

- **Share Meetings**

  To further discuss the customer's requirement, you decide to organize a meeting to discuss with the customer.

  Create a meeting in Outlook. While creating the meeting, open the side panel. Click **Share**. On the Share Meeting page, search for and select the customer, and click **Save**. If a meeting is shared while it is being composed, then it will be available in Sales after the meeting invite is sent and after the **Microsoft 365 Instant**

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Sync Job has run. Your administrator can configure to run this job at a specified scheduled frequency. For more information about Sync Scheduled Processes, see *Run Sync Scheduled Processes*.

Finally, salespeople can share external appointments in read-only mode within their organization. If you want salespeople to be able to update sales related data, then see the topic *Allow Updating of External Appointments* for more information.
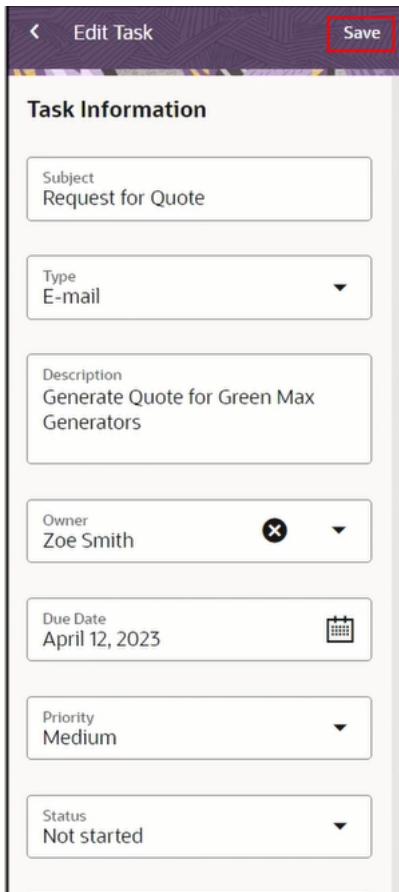
Create Follow Up Tasks

Salespeople can use the add-in to create follow up tasks that other salespeople or other members of the sales team must complete in the future as part of their sales activities. For example, they might want to create a follow up task for their internal teams to ensure they send a quote on time. From **More options** (the ellipsis icon), select **Create Follow up Task** as shown.
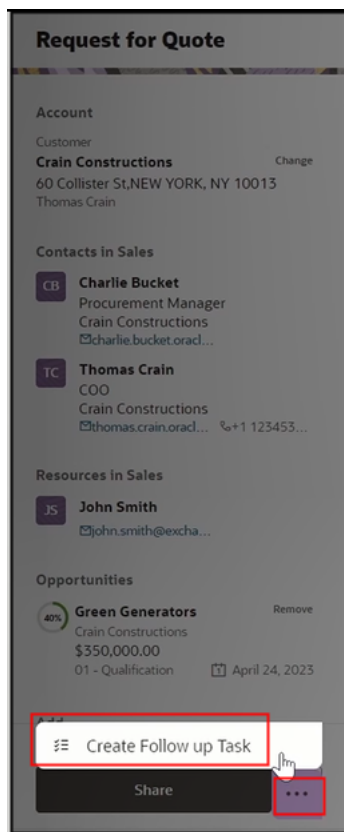
The task is automatically populated with the relevant data from the email body, so that all that salespeople need to do is:

1. Enter **Due Date**.
2. Select the responsible owner for the task from the **Owner** drop-down list.
3. Click **Save**.

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Once saved, the task is created and assigned to the owner selected above.

Focus on Sales Activities

The add-in also provides valuable insights to help salespeople stay focused on their daily sales activities. For example, it's easy to see the list of accounts they're meeting with today. If they have more than three meetings, they can click **View All** to get a list of all the meetings due. Here's an example screenshot:

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Salespeople can also access tasks they need for their attention and mark off those tasks they have completed.

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Add New Sales Contacts and Tasks and Set Contact Preferences

Salespeople can add contacts and tasks to Oracle Sales from the add-in. They can also set the communication preferences for contacts.

Here are some other tasks that, as a salesperson, you can do in the add-in:

- Get complete sales information for emails and appointments.

- Create contacts identified by the add-in as contacts not in Sales.

- Capture Outlook emails in Sales as conversation messages, including any internal exchanges related to an account.

- Capture exchange meetings in Sales as appointments.

- Create follow-up tasks for Outlook meetings and emails.

- Prepare for meetings with a full 360-degree-view of accounts you're meeting with today.

- Act on sales tasks that need attention.

- Wrap up today's completed meetings and get a preview of accounts you're meeting tomorrow.

- Search quickly for any type of Sales record.

Using the add-in side panel, salespeople can identify, from an email or a meeting, which of their contacts exist in Sales and which they need to add. This topic contains details about how to:

- Add contacts to Sales.

- Understand how the add-in displays contacts who aren't part of Sales.

- Set the communication preference for a contact.

- Add tasks to Sales.

Add Contacts to Sales

If the contact already exists in Sales, the side panel displays the name of the contact. If the contact doesn't exist in Sales, the Oracle Sales for Outlook home page prompts the salesperson to add the contact.

Here's how to add a contact to the sales application:

1. Open an email in Oracle Sales for Outlook.
2. Contacts who aren't in Sales show up separately in the side panel under Contacts not in Sales. To add the contact to the sales application, click **Create** next to the contact name, as highlighted in the following screenshot:

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.
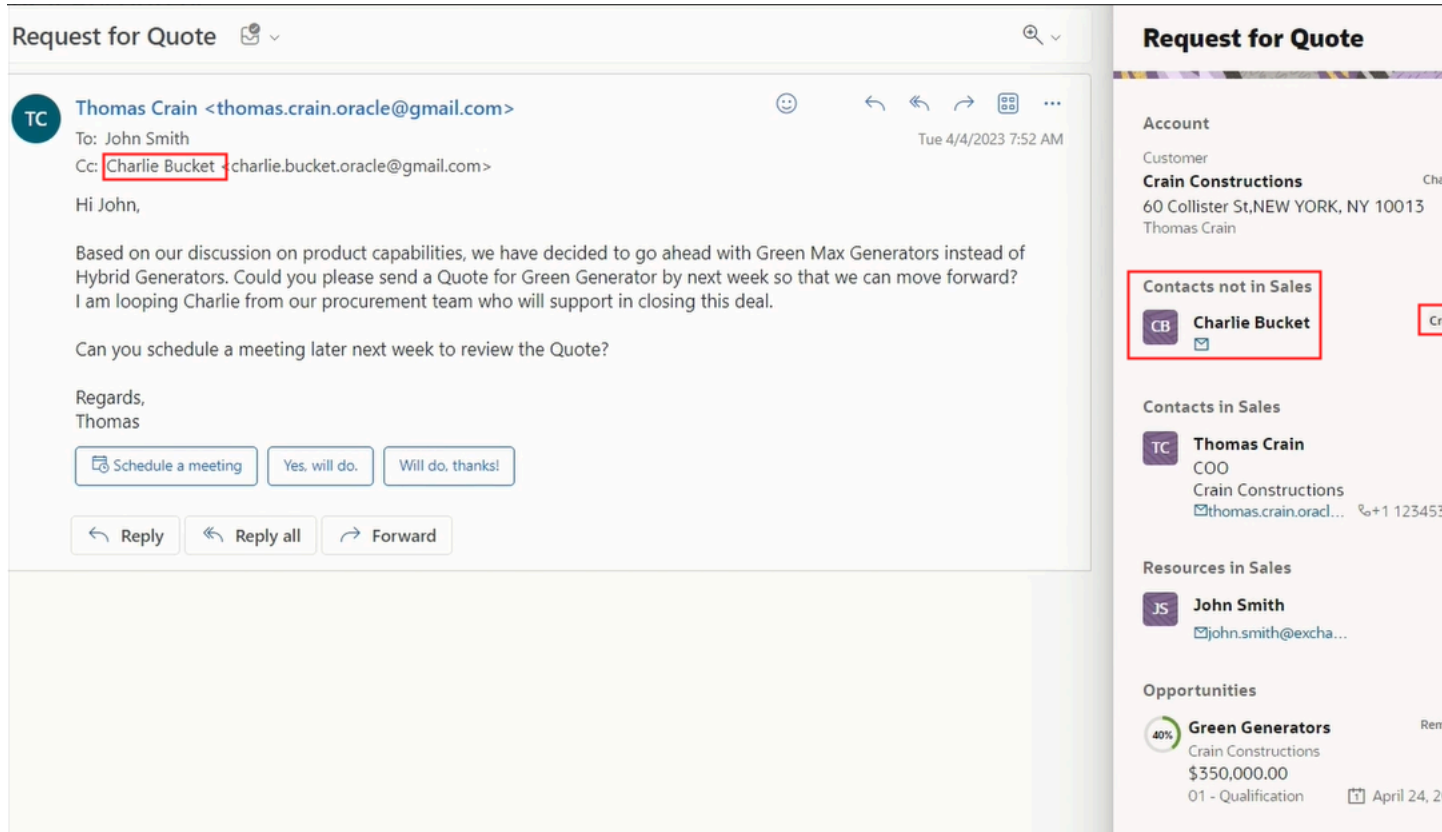
3. In the **New Contact** page, details such as first name and last name are automatically entered for you. The Email field already shows the sender's email.

4. Often, the contacts you add are business contacts. So, you may want to associate the contacts with the accounts they belong to.

   Note: The default account is based on the context of the email. If the account is already available on the Home page, then the application sets the account field to the same account.

5. Enter other details, such as job title, affinity, and mobile or work phone.

6. For the address fields, use the account address of the contact instead of typing in their personal address. To do so, select the **Use Account Address** check box.

7. Save the contact. The full name of the contact you just added appears in the side panel, confirming that the contact is added to Sales.

   Note: All the contacts you add appear in the Contacts list view. If your contact list is too long to fit on the list, you can use the search option to find a contact. When searching, enter the first name of the contact and press the **Enter** key on your keyboard, so that the add-in searches for the contact details on the server as well.

To edit or open the contact in the sales application, click **More options** (the ellipsis icon) on the home page and select the option you want.

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About Users Who Aren't Part of Sales

You may have internal users who aren't part of the Sales application, that you want to list as contacts. For these contacts, you register their email domains in the Alternate Microsoft Domains field Synchronization Settings page. After the contact domains sync to Sales, they appear in a separate section named Resources in the contacts list.

See *Configure Overall Sync* for more information.

Set Communication Preference for a Contact

Some contacts may not want to be called on the phone, emailed, or get mail to their home or office address. Salespeople can indicate the communication preference as Do Not Call, Do Not Email, or Do Not Mail from the Microsoft 365 add-in. If the do-not-contact preferences is set in the Sales application, then the add-in indicates such preferences in the Contacts list view.

Here's how to enable communication preferences from the add-in:

1. Open **Contacts** from the menu.
2. For an existing contact, edit the record. For a new contact, set the preference when creating the contact.
   - **Do Not Call** is available on the contact number fields. Once you set this, the indicator reflects the preference for all the contact numbers.
   - **Do Not Email** is available on the Email fields. Once you set this, the indicator reflects the preference for all the email IDs of the contact.
   - **Do Not Mail** is available on the Address fields. Once you set this, the indicator reflects the preference for all the addresses of the contact.
3. Save the contact.

Add Tasks to Sales

Salespeople must have an email open in Oracle Sales for Outlook to create and add tasks to the sales application.

Here's how:

1. Open the Oracle Sales for Outlook add-in.

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2. Click **More options** and select **Create Follow up Task** as shown in this sample image:

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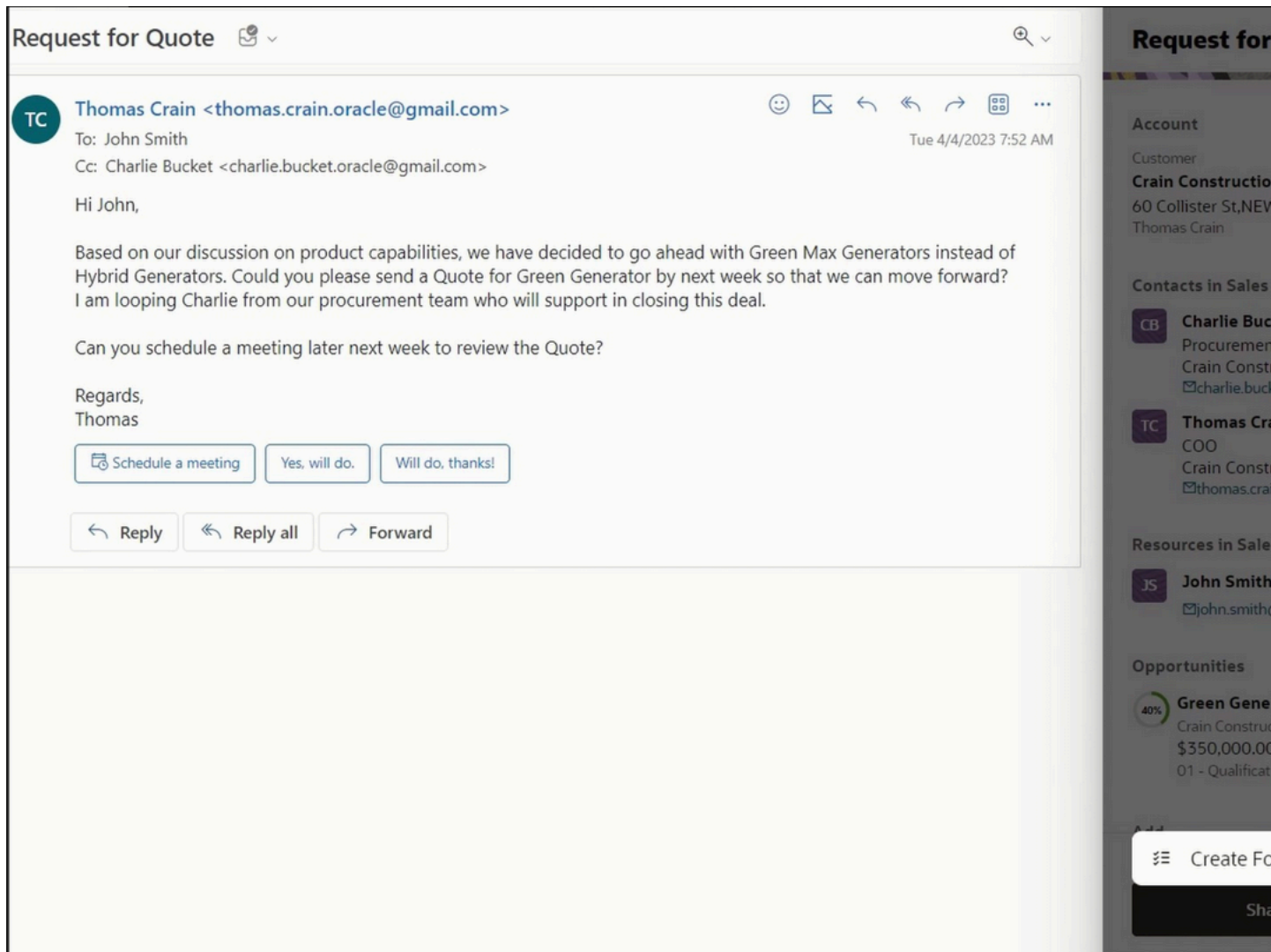
3. In the New Task page, details such as Subject, Type, and Description are populated based on the email or appointment being viewed. Here's a sample image of the Edit Task page:

4. Add other details, such as Due Date, and assign the task to the appropriate owner of the task.
5. Save the task.

Salespeople can view their tasks from the Tasks card on the Insights page.

Sync Records Between the Sales Application and Exchange

Salespeople can save time by using the synchronization feature to keep their appointments, contacts, tasks, and emails records current between their Sales application and Exchange.

For more details about synchronizing records, see *Overview of the Sync Between Sales and Exchange*.

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Salespeople can view their sync preferences from the **Sync Preferences** section in the **Settings** page in the Navigation panel.
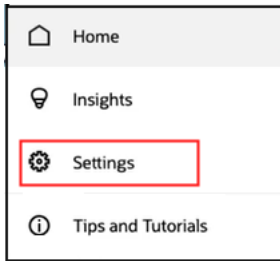
This topic comprises these sections:

- Enable sync

- Define the sales records to be synced with Outlook

Note: Any changes that salespeople make to their sync preferences override the sync settings configured by the administrator.

Enable Sync

Salespeople can enable or disable the sync engine. If sync is enabled, then the application runs the synchronization process at scheduled intervals. Once enabled, salespeople can decide the turn off synchronization by deselecting **Enable sync**. If not selected, then records aren't automatically synced between Exchange and the Sales application.

Define the Sales Records to be Synced with Outlook

Salespeople can select predefined saved searches from the side panel or create their own saved search in the sales application. They can view and configure which records are being synced with Outlook by selecting their preferred Workspace saved searches for tasks and contacts. When salespeople select a saved search, the corresponding records that match the search criteria are synchronized with Exchange during the next synchronization run. For more information about the sync setting Allow Users to Override Default Saved Search, see the *Configure Overall Sync* topic.

Salespeople can choose not to synchronize their blocked time with the sales application by deselecting the **Include my appointments with no attendees** option. This setting only appears for the user if the Auto Sync for Appointments setting is enabled. For more information, see *Autosync Appointments*.

To reset preference settings, click **Reset to Default**, as shown in this sample image:

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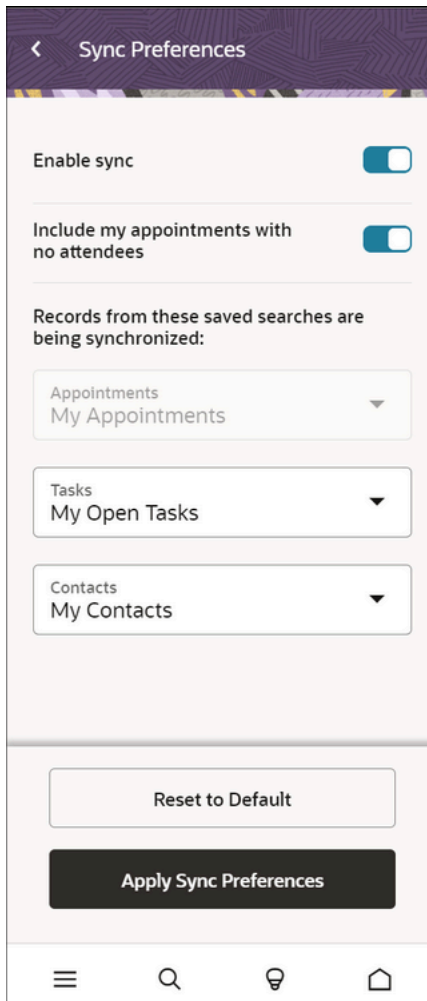
Salespeople can select any Workspace saved searches for the tasks and contacts available to them. For more information, see the *Create Saved Searches in Workspace* topic.

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5 Extend the Add-In

Outlook Add-In Extensible

You can manage the objects and fields that are visible in the Microsoft Outlook. Here are just some of the tasks you can do:

Extensible Objects

This table lists the objects and any associated children that you can configure, as well as the layouts within those objects that you can extend. In addition to the objects listed, you can also add related list and picker layouts for any custom objects.

Object Views	Extensible Layouts	Available for Global Search	Associated Children
Appointment	Related List layouts	No	None
Accounts	Related List, Summary, Picker, and Global Search layouts	Yes	• Address
Contacts	Related List, Summary, Edit, Picker, and Global Search layouts	Yes	• Address
Sales Leads	Related List, Summary, Picker, and Global Search layouts	Yes	• Sales Lead Contact • Sales Lead Resource
Opportunities	Related List, Summary, Picker, and Global Search layouts	Yes	• Opportunity Contact • Opportunity Competitor • Opportunity Revenue • Opportunity Team Member
Resources	Related List and Picker layouts	No	None
Task	Related List, Summary, Edit, and Global Search layouts	Yes	• Activity Assignee • Activity Contact

Configure the Add-In Using Application Composer

Open and create a sandbox and then configure the add-in using Application Composer:

1. Sign in as the sales administrator or as a setup user.
2. Ensure that you're working in an active sandbox.
3. Go to **Navigator** > **Configuration** > **Application Composer**.
4. Select **Productivity Applications Setup** from the Overview region.

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5. Select the **Oracle Sales for Outlook** tab to get to the Oracle Sales for Outlook
   Composer. Here's an example image of the Oracle Sales for Outlook Composer.
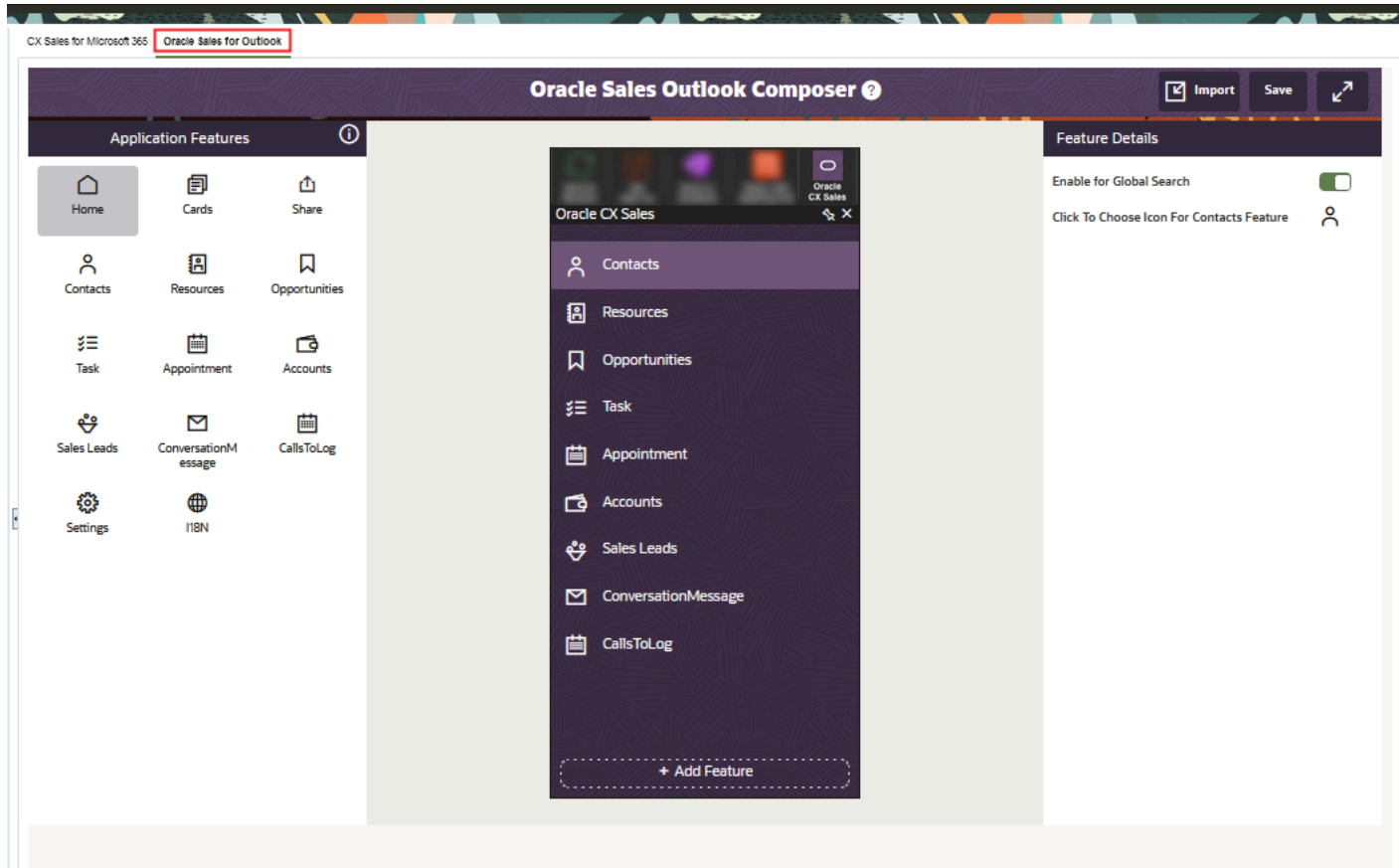
In the Oracle Sales for Outlook configuration tool, you can see the Application Features pane which lists the standard
and custom objects that are enabled for Oracle Sales for Outlook in the current sandbox. This pane also includes the
settings that you can set up for Oracle Sales for Outlook, which includes user settings.

You can also see a visual representation of your configured version of the add-in. The + Add Feature button lets you add
a custom object to the app.

From the Feature Details section, you can enable Global Search for each of the standard objects listed on the Home
page. You can also select the icon you want to represent a feature object.

Enable Templates for Salespeople to Use When Composing Emails

Enable email templates to let salespeople communicate more effectively via email. After you enable the message
templates, salespeople can simply select a template and their email is automatically populated with relevant information
from the sales records based on the selected template.

Setting up message templates for use in Outlook involves these high-level steps:

1. Create templates for use in the add-in. See *Create Email Templates (Message Templates)* for more information.

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2. Enable the business objects that you want to expose the associated templates in the add-in for.

Enable the Objects to Expose the Email Templates in the Add-In For

Here's how to enable the use of templates per object you want to use them with:

1. Sign in as the sales administrator or as a setup user.
2. Ensure you're in a sandbox with Application Composer enabled.
3. Navigate to **Configuration** > **Application Composer**.
4. Select **Productivity Applications Setup** from the Overview region.
5. Select the **Oracle Sales for Outlook** tab to get to the Oracle Sales Outlook Composer.
6. Click the **Share** icon and then click the **Email** icon.
7. In the **Layouts** pane, click the **Click to Clone** icon for the standard layout, and enter a layout name that reflects the purpose of the layout.
8. Toggle the **Enable Email Templates** slider to the on position.
9. Select the object that you want to see the associated email templates in the add-in for. For example, select Accounts and Opportunities.
10. Click **Save**.

    Now your users can select the enabled email templates while composing emails in the add-in.

Summarize Calls so Salespeople Can Quickly Enter Meeting Notes and Outcomes

Remind the salespeople to follow up on the day's meetings with a summary of the calls to log in the Insights page. Salespeople can capture notes for a meeting outcome or create follow-up activities.

The Calls to Log list displays the first three appointments in the order that the meetings occurred. Salespeople can view all appointments if there are more than three completed daily appointments. They can click **Calls to Log from Last 7 Days** if there are calls to log from the previous seven days. You can change the date range from seven to any number of days in the past.

Salespeople can dismiss the reminder if they don't need to follow up. In addition, salespeople get proactive notification when a meeting starts. Clicking on the notification opens a page that lets them take notes on the currently running meeting.

Enable the Calls to Log Card

To enable the Calls to Log card in the add-in, make sure that these profile options are set to Yes:

- Interactions Call Wrap Ups Enabled (ORA_ZCA_ENABLE_INTERACTIONS_CALL_WRAP_UPS)
- Interaction Tracking Enabled (ORA_ZCA_ENABLE_TRACKING_INTERACTIONS)

Here's how to set the profile options:

1. Sign in as a user with the Sales Administrator job role or as a setup user.
2. In Setup and Maintenance, search for the select the **Manage Administrator Profile Values** task.
3. Search for the profile options using the codes listed, and set them to Yes.
4. Save your work.

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Hide or Show the Calls to Log Card

The Calls to Log card is enabled by default. You can hide it altogether in Application Composer. Here's how:

1. Sign in as the sales administrator or as a setup user.
2. Ensure that you're working in an active sandbox with Application Composer enabled.
3. Go to **Navigator** > **Configuration** > **Application Composer**.
4. Select **Productivity Applications Setup** from the Overview region.
5. Select the **Oracle Sales for Outlook** tab to get to the Oracle Sales Outlook Composer.
6. Click the **Cards** icon.
7. In the **Layouts** pane, click the **Click to Clone** icon for the standard layout, and enter a layout name that reflects the purpose of the layout.
8. Select your new layout.
9. Click the **Calls to Log** card in the center panel.
10. To disable the card, in the Calls to Log Card Settings section, move the **Show Card** toggle to the off position.
11. After making updates to your page layout, click **Save** in the configuration tool page, and test and publish your new page layout. See the *Test Your Oracle Sales for Outlook Configurations* topic for details about how to check your Oracle Sales for Outlook configurations.

Configure the Home Page

The Home page displays pertinent sales information in the context of the email or appointment that salespeople are viewing.

The Home page also helps salespeople add related records to an appointment or email before sharing them with the sales application. They can configure which related records – such as accounts, opportunities, or leads – are being shown or that can be added from the Share views on the Oracle Sales for Outlook composer.

Depending on context of the add-in, there are two type of Share views:

- Appointments share view
- Email share view

Appointments Share View

When salespeople open the add-in home page in the context of an appointment, this view is shown with related and information sections:
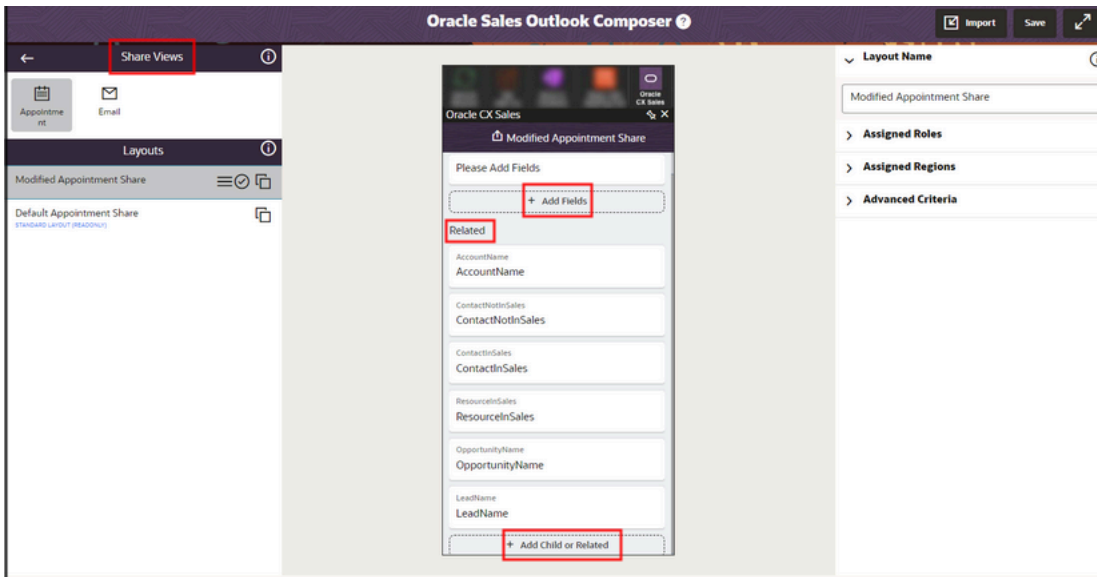
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The Related section shows all appointments associated with the object, such as accounts, contacts, opportunities, or sales leads. You can remove any object from the view or add custom related or child objects by clicking **Add Child or Related**.

You can change the order of objects shown in the Share view by clicking **Drag to move** icon and rearranging them.

The information section shows all standard and custom fields of the Appointment object. This section is only available on custom layouts to show or capture additional appointment information. You can click **Add Fields** to add any available field from the Appointment object.

Email Share View

When salespeople open the add-in home page in the context of an email, the view displays only a related section.

The related section shows all appointments associated with the object, such as accounts, contacts, opportunities, or sales leads. You can remove any object from the view or add custom related or child objects by clicking **Add Child or Related**.

You can't add custom related objects to Email Share views.

> **Note:** You can't remove Account, Contact or Resource objects from the share views.

Create a Specific Layout

In the Oracle add-in, there are standard pages for capturing details like user accounts and appointments. However, your business might want to capture more details for accounts or appointments that aren't available in the standard pages.

In this case, you can create your own layouts for these pages. The layouts can be in any of the following page view formats: Related List, Summary, Edit, Picker, or Global Search. In your own layouts, you can add the fields of your choice and also decide user access at the form level or even at a field level.

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Here are the basic configuration steps that enable you to make simple changes to a layout:

1. Sign in a sales administrator or as a setup user.
2. Ensure that you're working in an active sandbox.
3. Go to **Navigator** > **Configuration** > **Application Composer**.
4. In the Common Setup menu, or on the Overview page, go to **Productivity Application Setup** and then select **Oracle Sales for Outlook**.
5. Select the feature you want to create a new layout for. For example, click the **Accounts** feature.
6. In the **Accounts View** pane, select the type of page view. For example, click the **Summary** view.
7. In the **Layouts** pane, click the **Click to Clone** icon for the standard layout, and enter a layout name that reflects the purpose of the layout. Here's a sample screenshot:
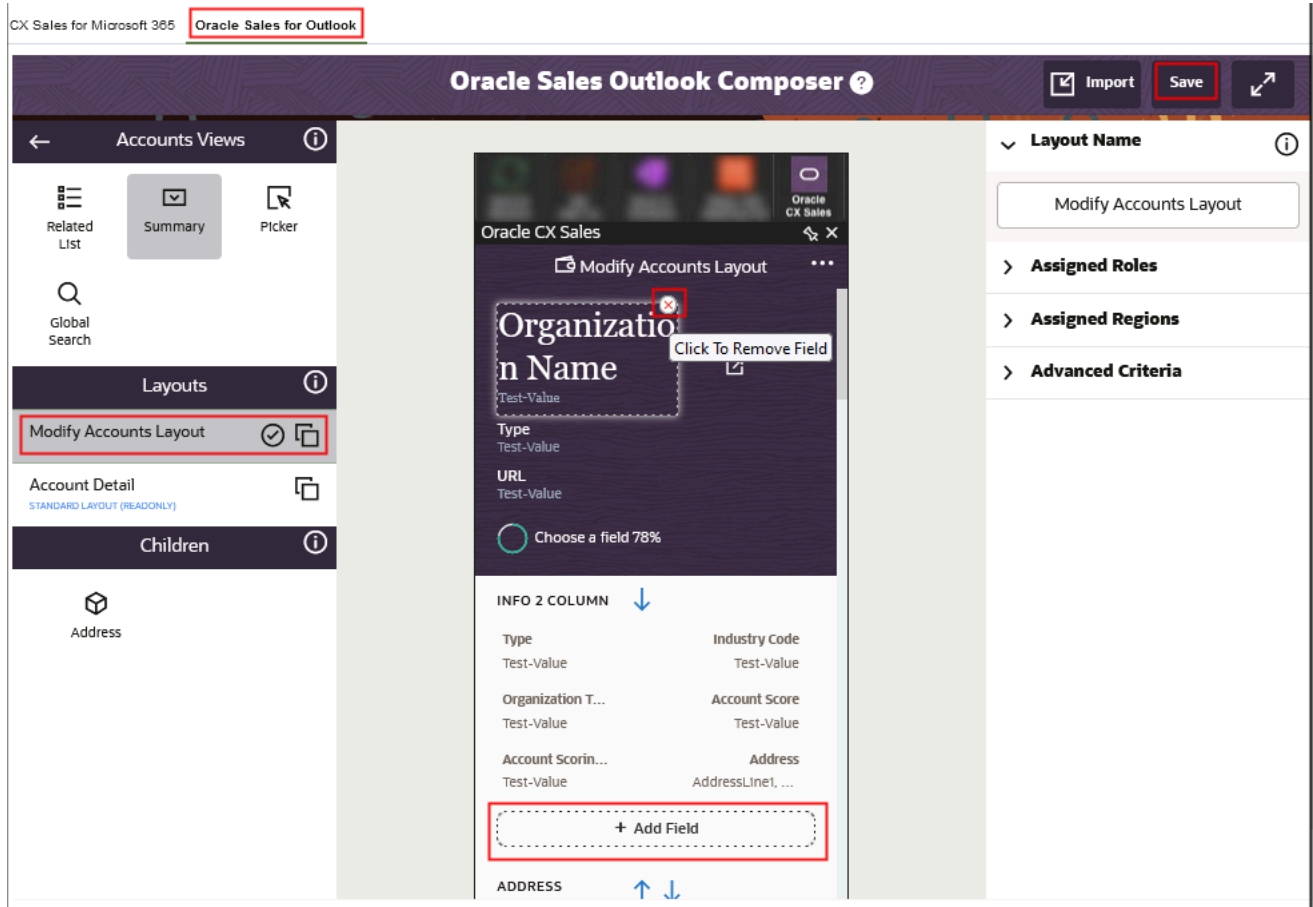
8. Change the fields that appear by clicking the relevant field and selecting a new field from the **Select Field** dialog window.
9. To move a field, click the field that's positioned where you want your field to appear, and then select or search for the relevant field in the Select Field dialog window.

   To re-position the field that you've just removed, click the field that's positioned where you want your field to appear, and then select the relevant field.
10. Select the **Active** icon to make your layout active.

    After you've created the layout, you can configure the fields that are available, assign roles, and add criteria to the layout.
11. Click **Save** in the **Oracle Sales for Outlook** page.
12. Test your new page layouts and then publish the sandbox according to your company's practices.

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To make more extensive changes to a page layout, you'll need to familiarize yourself with the additional capabilities of the different types of page layouts. See the related topics in this section for more details.

Configure the Summary Page Layout

The Summary page layout displays an object's details.

Six sections make up the Summary layout:

- A section that shows the object's contact information and top-level information of your choice
- Up to four information sections
- The child and related objects section

You can make simple changes to the Summary page layout, as described in the *Outlook Add-In Extensible* topic.

To make more extensive changes to the Summary page layout, consider these points:

> **Note:** You can add fields that are web links, such as URLs, with a prefix of `http://` or `https://`. If you add this type of field to the Top Section or to an Information section, it displays as a link on the field label. The field value (the URL) isn't shown. When users click the field label, the web link opens in a new browser window.If you add this type of field to the Info 1 Column or Info 2 Column sections, then both the field label and URL value is shown. When users click the URL, the web link opens in a new browser window.

The Top Section

Here are the points to note about configuring the top section:

- You can change the fields, remove fields, and move fields using the steps in the *Outlook Add-In Extensible* topic.
- You can't move the top section, because this section is designed to contain the top-level information for the object.
- You can hide the **Open in CX** button from the summary view if you don't want users to open sales records from here.

The Information Sections

Here some points to note about the Information sections:

- The Information sections (you can have up to four) are called:
  - Information
  - Address
  - Info 1 Column
  - Info 2 Column.
- You can reorder any of the sections by using the up and down arrows.
- You can add fields by clicking the **+ Add Field** button on each section. There's no limit as to the number of fields you can add.

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- The Information section only displays email, phone, and address icons and not field labels, so you should only select email, phone, and address fields that can have an icon and that don't require a field label.

- In the Address section of Accounts and Contacts Summary page layouts, you can remove the actions that are available for addresses, such as editing or deleting an address.

- The Info 1 Column has a one-column layout and displays only one field across the page.

- The Info 2 Column has a two-column layout, so two columns are displayed side-by-side across the page.

The Child and Related Object Sections

The section for adding child and related objects is located at the bottom of the Summary page layout.

- This section can't be moved, but you can add as many child and related objects as you want by clicking **+ Add Child or Related**.

- When you add a child or related object, you can choose from five different templates, which you can then configure in the child objects' List page layout. See the *Configure Child Object Page Layouts* topic for more information.

Other Configuration Options for Summary Pages

Other configuration options for Summary pages include:

- Add or hide actions on the Summary page, such as whether a user can create a task, add a note, or edit the object. Click the more icon (three horizontal dots) on the page for the list of available actions. Click **+** to add an action or click an action's **X** icon to hide the action.

  You can also hide or add actions for child objects by clicking the child object and following the same steps. See *How can I add actions to a layout?* topic for more details.

- Assign roles and geographical regions to Summary page layouts. You can restrict who can view the page layout by role or geographical region.

- You can also define a set of conditions that must be met before the page layout is displayed. For example, if you create this criteria: `Win probability is Greater than 50%`, then any opportunities with a win probability greater than 50% will use your layout. You can find more details about how to set these up in *Use Advanced Criteria*.

After making updates to your page layout, make sure that you click **Save** in the configuration tool page, and test and publish your new page layout. See the *Test Your Oracle Sales for Outlook Configurations* topic for details about how to check your Oracle Sales for Outlook configurations.

Configure the Edit Page Layout

The Edit page layout displays when a user edits an object's details in the add-in. You can make simple changes to the Edit page layout, as described in the *Outlook Add-In Extensible* topic.

Here's the types of changes you can make to the Tasks page layout:

- To add a field, scroll down and click **+ Add Field**.

- To move a field, click the field that's positioned where you want your field to appear, and select or search for the relevant field in the **Select Field** dialog box. To re-position the field that you've just removed, click the field that's positioned where you want your field to appear, and select the relevant field.

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- In the Account and Contact Edit page layouts, you can remove the actions that are available for addresses, such as editing or deleting an address.

- Add child objects at the end of the page layout by clicking **+ Add Child**.

- You can also assign roles and geographical regions. These enable you to restrict who can view the page layout by their role and their geographical region.

- You can also define a set of conditions that must be met before the page layout is displayed. For example, if you create criteria as follows: `Win probability is Greater than 50%`, then any opportunities with a win probability greater than 50% will use your layout. You can find more details about how to set these up in the *Use Advanced Criteria* topic.

After making updates to your page layout, make sure that you click **Save** in the configuration tool page, and test and publish your new page layout. See the *Test Your Oracle Sales for Outlook Configurations* topic for details about how to check your Oracle Sales for Outlook configurations.

Configure the Picker Page Layout

The Picker page layout displays when users select an object from a list, such as when a user selects an opportunity from an opportunity search.

You can make simple changes to the Picker page layout, as described in the *Create a Specific Layout* topic. To make more extensive changes to the Picker page layout, note these points:

- You can change the fields, add up to six fields, remove fields, and move fields using the steps in the *Create a Specific Layout* topic.

- You can also enable or disable the ability to create an object from the picker by adding or hiding the page actions. Click the **More** icon on the page and either add the Create action if it isn't there, or remove the action using the cross icon that appears when you hover over the action.

After making updates to your page layout, make sure that you click **Save** in the configuration tool page, and test and publish your new page layout. See the *Test Your Oracle Sales for Outlook Configurations* topic for details about how to check your Oracle Sales for Outlook configurations.

Create Task Layouts

To create task layouts in Microsoft 365 for Redwood UX (the Microsoft Outlook add-in), you add new fields to the add-in UI.

Create Task Layouts in Oracle Sales for Outlook

Here's how to create task layouts:

1. Sign in as a setup user.
2. Ensure you're working in an active sandbox where Application Composer is enabled.
3. Navigate to **Tools** > **Application Composer** > **Productivity Applications Setup** > **Oracle Sales for Outlook**.
4. Go to **Task** > **Edit**.
5. Click next to the Task Edit default layout.

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6. Enter the layout name, for example, AccountType, and select it. As long as the status is In progress, this layout will be active.
7. In the application layout, click **Add Field**.
8. Search for and select **AccountType**.
9. To configure the layout change when the status is **In progress**:
    a. Click **Advanced Criteria**.
    b. Click **Add Criteria**.
    c. Select **Status** in the Field drop-down list.
    d. Select **Equal to** in the Operator drop-down list.
    e. Select **In progress** in the Value drop-down list.
10. Save your changes.

To create additional layouts:

1. In the Oracle Sales for Outlook tab, go to **Task** > **Edit**.
2. Click [icon] next to the **Task Edit** default layout.
3. Enter the layout name, for example, Custom Layout 2, and select it.
4. In the application layout, click **Add Field**.
5. Search for and select **SubType**.
6. To configure the layout change when the status is **Complete**:
    a. Go to **Advanced Criteria** > **Add Criteria**.
    b. Select **Status** in the Field drop-down list.
    c. Select **Equal to** in the Operator drop-down list.
    d. Select **Complete** in the Value drop-down list.
7. Save your changes.

Validate your Changes in the Microsoft Outlook Add-In

1. In the Outlook add-in, make sure you're signed in to Oracle Sales.
2. Go to **More Options** > **Create Follow Up**.
3. Select **In progress** in **Status**. Custom Layout 1 should be displayed.
4. Select **Complete** in **Status**. Custom Layout 2 should be displayed.

Configure the Global Search Page Layout

Salespeople can use Global Search directly from any page in the app to locate any type of record quickly and easily. You can configure which fields appear in the global search results page, so that your salespeople view the most important information for their specific business needs.

See the *Outlook Add-In Extensible* topic for instructions about how to create a new page layout.

Note these points about the Global Search layout:

- You can change the fields, add up to six fields, and remove fields using the steps in the *Outlook Add-In Extensible* topic.
- You can't assign criteria, such as user roles or geographical regions, for Global Search page layouts.

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After making updates to your page layout, make sure that you click **Save** in the configuration tool page, and test and publish your new page layout. See the *Test Your Oracle Sales for Outlook Configurations* topic for details about how to check your Oracle Sales for Outlook configurations.

Configure the Related List Page Layout

The Related List page layout displays a list of an object's records, with each record showing a set of fields that you can configure.

You can make simple changes to the Related List page layout, as described in the *Outlook Add-In Extensible* topic.

To make more extensive changes to the Related List page layout, note these points:

- When you configure the top card in the Related List page layout, the changes are reflected in every card in the list when users view them in the app.

- You can add up to two new fields to the card, and you can change the existing fields. Just click the field and select a field from the list.

- You can add or hide actions for the Related List page, such as whether users can create a task, add a note, or edit the object.

  Click the more icon (three horizontal dots) on the page for the list of available actions. Click **+** to add an action or click an action's **X** icon to hide the action.

  You can also hide or add actions for child objects by clicking the child object and following the same steps.

  See *How can I add actions to a layout?* topic for more details.

- You can also add or hide actions for the card, such as Edit, Add Note, and Share. Click the more icon on the card for the list of actions. Click **+** for additional actions and click an action's **X** icon to hide the action.

- You can assign roles and geographical regions to List page layouts. This configuration lets you restrict who can view the page layout by assigned role and geographical region.

After making updates to your page layout, make sure that you click **Save** in the configuration tool page, and test and publish your new page layout. See the *Test Your Oracle Sales for Outlook Configurations* topic for details about how to check your Oracle Sales for Outlook configurations.

Configure Child Object Page Layouts

Not only can you add child objects to the Summary and Edit page layouts, but you can also create page layouts for the child objects themselves.

Here are points to note when configuring page layouts for child objects:

- When you add a child object to a parent object's page layout, the child object is added to the Children pane. To create a page layout for the child object, click the child object and clone the standard page layout, just as you would for the parent object.

- Configuring a child object page layout is the same as configuring a parent object's page layout, so you can follow the same steps you're already familiar with in this section.

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- The template that's used for a child object's List page layout is selected when you add the child object to a parent page. You can then further configure the List page when you select the child object and clone the standard page layout.

- You can assign roles and geographical regions to child object page layouts. You can also assign criteria for displaying the page layout, known as Advanced Criteria. When you're using Advanced Criteria, you can select fields from the parent object, as well as the child object. You can find more details about this in the *Use Advanced Criteria* topic.

See the *Configure the Summary Page Layout* and *Configure the Edit Page Layout* topics for more details.

After making updates to your page layout, make sure that you click **Save** in the configuration tool page, and test and publish your new page layout. See the *Test Your Oracle Sales for Outlook Configurations* topic for details about how to check your Oracle Sales for Outlook configurations.

Configure the Insights Page

Cards page layouts help you configure the Insights page in the add-in. The Insights page offers valuable insights into activities that need salespeople attention.

The Insights page lets salespeople keep track of their sales activities with ease. Salespeople can access the Insights page from anywhere by clicking on the Insights (bulb icon) in the navigation bar.

The Insights page consists of various cards like Accounts, Tasks, and a summary of Calls to Log. You can configure these in the Cards view.

Configure the Insights Page

Here's how you configure the Insights page:

1. Sign in as a sales administrator role.
2. Select the sandbox you want use for your configurations.
3. Navigate to **Configuration** > **Application Composer** > **Productivity Application Setup** > **Oracle Sales for Outlook**.
4. In the Application Features pane, click **Cards**.
5. In the Layouts pane, click the **Click to Clone** icon for the standard layout and enter a layout name that reflects the purpose of the layout.
6. All the cards are displayed by default. To hide a card, click the card in the interface designer and disable the **Show Card** option in the Card Settings pane.
7. To assign a role to your Cards layout, add the role in the **Assigned Roles** pane.
8. To re-order the cards, drag the card in the interface designer to the position you want.
9. Click **Save**.

Additional Card Options

There are more configurations available based on the Card, like:

- **Accounts You Are Meeting Card**

  You can configure the fields that are shown on each account from the Related List layout for the Account object. To view the Account Related list layout, go to **Application Features** in the Oracle Sales for Outlook composer

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and click **Account** > **Related List**. The same fields selected on the related list for accounts are shown on the card.

- **Tasks Card**

  The task card shows your tasks that are:

  - Due Today
  - Past Due
  - Due within 7 Days

  The Past Due category displays tasks whose due date is in the past 90 days. Similarly, Due within 7 Days tasks show tasks whose due date is in the future 7 days.

  You can configure the date ranges considered by clicking **Past Due** or **Due within 7 Days** in the Tasks card in your custom layout.

- **Calls To Log**

  This card displays a list of completed appointments that haven't yet been logged. See *Summarize Calls so Salespeople Can Quickly Enter Meeting Notes and Outcomes* for more information.

Set Role Permissions for Your Layouts

On the Related List, Edit, and Summary layouts you create, you can make a few fields available only to certain user roles. For example, you can show some fields in the Account detail page to only sales managers and hide them from others. You can also create layouts for specific geographical regions.

Assign a Role to a Layout

Here's an example of how you can add the Sales Manager role to the Accounts Summary layout:

1. Sign in as the sales administrator or as a setup user.
2. Ensure that you're working in an active sandbox.
3. Go to **Navigator** > **Configuration** > **Application Composer** > **Productivity Applications Setup** > **Oracle Sales for Outlook**.
4. In the Application Features region, click **Accounts**, and then click **Summary**.
5. Select the Standard layout and create a copy.
6. Give a name to the layout you created.
7. In the **Assigned Role** section, search for and select the Sales Manager role.
8. From the **+ Add Field** section of the layout, select or search for the **Parent Account ID** field in the Select Field pop-up window.
9. Save your changes.
10. Publish the sandbox according to your company's practices.

When a user signs in to the add-in with the Sales Manager role, they'll see the Parent Account ID. However, users with other roles won't see this field.

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Assign Geographical Regions to a Page Layout

Adding geographical regions to a standard or custom object's page layout lets you restrict the availability to users from a specific set of geographical regions. For example, if you add the United States and United Kingdom regions to a page layout, then only users from these countries can view the layout.

Here's how you set it up:

1. Repeat steps 1 through 6 in the Assign a Role to a Layout section.
2. In the **Assigned Regions** pane, select the geographical regions by clicking on the region. Select as many regions as you require.
3. Click **Save**.

Use Advanced Criteria

The advanced criteria functionality lets you define a set of conditions that the application must meet before displaying the page for a feature's Summary or Edit views.

For example, if you create advanced criteria for an Opportunity Summary page layout like "Status Equal to Open", then your layout only shows open opportunities.

> **Note:** You can't create advanced criteria for List, Picker, and Saved Searched layouts.

Here are the steps to create advanced criteria:

1. Sign in as the sales administrator or as a setup user.
2. Ensure that you're working in an active sandbox.
3. Go to **Navigator** > **Configuration** > **Application Composer** > **Productivity Applications Setup** > **Oracle Sales for Outlook**.

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4. In the Application Features section, expand the feature that contains the page layout
   that you want to add advanced criteria to, as shown in this example screenshot:
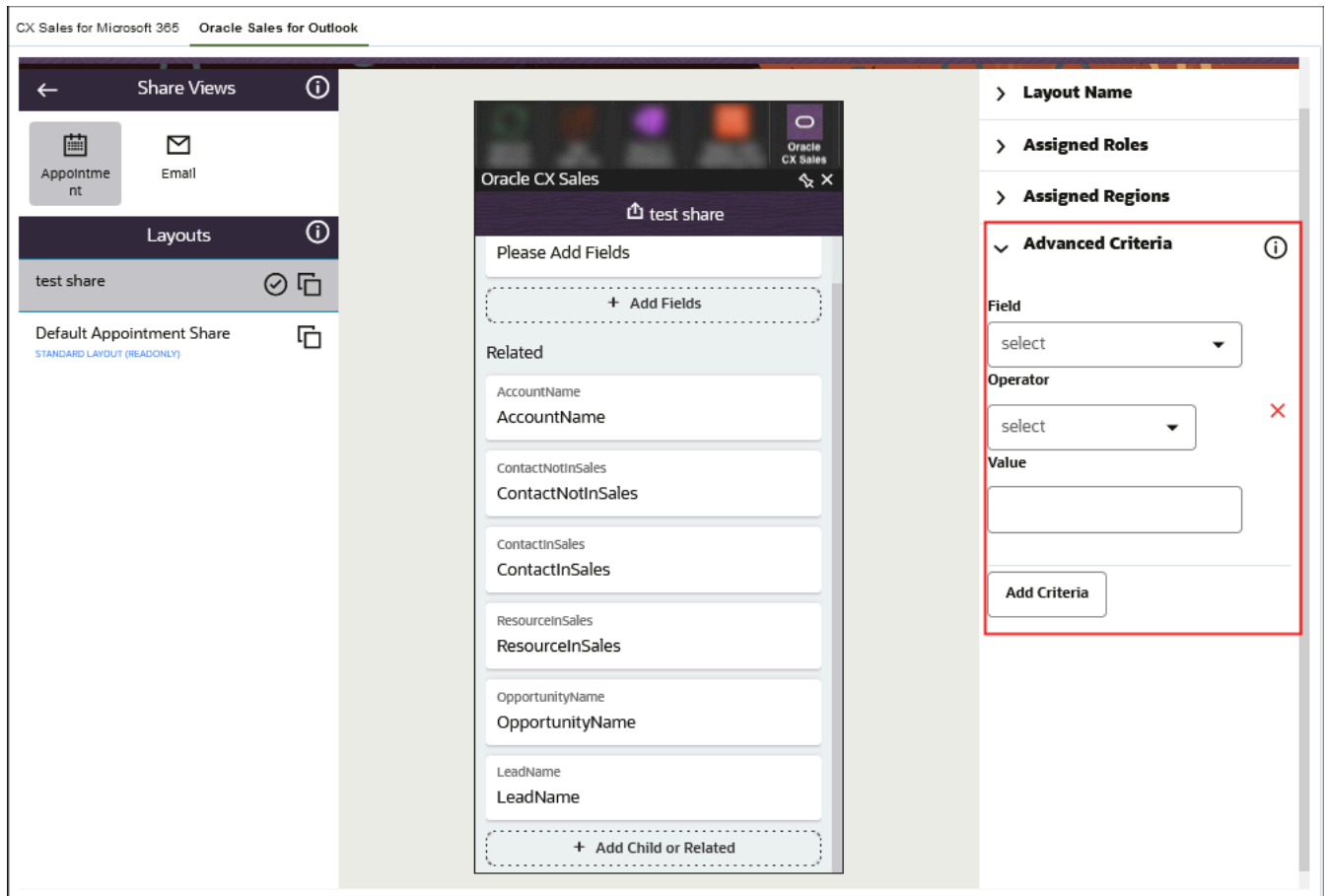
5. Expand the relevant layout and create a new layout.
6. In the Advanced Criteria region, click **Add Criteria**.
7. Create your criterion by selecting the **Field**, **Operator**, and then entering the condition in the **Value** field.

   You can create multiple condition statements and join them using the AND or OR clauses.
8. Click **Save**.
9. Publish the sandbox according to your company's practices.

Prioritize Your Page Layouts

Page layouts display in priority order in the Layouts pane. The page layout at the top is the first layout that's displayed to the user, if they fit the criteria that you've set up. The second page layout is the second layout that displays if the user doesn't fit the first criteria, but does fit the second page layout's criteria, and so on. You can move the layouts around by dragging them to your preferred priority position.

It's recommended that you create a default layout that's applicable to everyone and that you place the default layout at the end of the Layouts pane. Setting a default layout means that users will see at least one of the page layouts if they don't fit the criteria you've set up.

After making updates to your page layout, make sure that you click **Save** in the configuration tool page. Also be sure to test and publish your new page layout. See the *Test Your Configurations or Extensions* topic for details about how to check your configurations.

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Add a Custom Field to the Add-In

You can add custom fields to the add-in.

This configuration involves three main steps:

1. Create the custom field for the Sales application.
2. Make the field available in Adaptive Search.
3. Add the field to the add-in.

Create the Custom Field

1. Sign in as the sales administrator or as a setup user and navigate to Application Composer.
2. Ensure that you're working in an active sandbox and that Application Composer is enabled in the sandbox.
3. Search for the object you want to create the field for.
4. Expand the object node and click **Fields**.
5. In the Fields page, click **Create**.
6. On the Select Field Type window, select the type of field you're creating.
7. Enter the required information for the field. What you enter is different for each field type. For details, see the topic *Field Types and Field Properties*.
8. Make sure the **Include in Service Payload** check box is selected.
9. Click **Save and Close**.
10. Click the sandbox name and select **Publish**.
11. On the Sandbox Details page, click **Publish** again.

Make the Field Available in Adaptive Search

Follow the instructions in the topic *Make Additional Fields Searchable*.

Add the Field to the Oracle Sales for Outlook UI

Follow the instructions in the topic *Create a Specific Layout* and related topics in this section.

Test Your Oracle Sales for Outlook Configurations

After you've configured the add-in using Application Composer, you should test your configurations before distributing them to your users. Here's how:

1. After making your configurations, keep the Sales application open and ensure that the sandbox where you made the changes is active.
2. Open and sign in to the Oracle Sales for Outlook add-in as the same user that you used to make your configurations. If you're already signed in to the add-in, then force-close it and open it again. The add-in picks up the latest updates in the sandbox when you restart the add-in or when you sign in.
3. Once you've restarted the add-in and signed in, your configurations are ready to view. The sandbox where you made your configurations is linked to your user details, and the configurations are automatically downloaded when you restart the app.
4. If you make further updates in the sandbox, then force-close the add-in and sign in again to see the updates.

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5. When you're done with configurations, publish the sandbox to distribute the configurations to your users.

How to Migrate Your Existing Customizations

You can easily migrate your existing customizations from the previous version of the add-in (CX Sales for Microsoft 365) or from CX Sales Mobile.

The migration lets you import your existing customizations that you've made into the Oracle Sales for Outlook add-in.

As part of the migration, your custom layouts with fields, assigned roles, and advanced criteria are imported with the layout name appended with **_migrated**. The migration will also import custom objects and their related list and picker layouts. After successful migration, a report highlights all the layouts and fields that were migrated.

This table lists the objects and layouts that are migrated:

Objects	Layouts
Accounts	Related List, Summary, Picker, and Global Search layouts
Contacts	Related List, Summary, Edit, Picker, and Global Search layouts
Sales Leads	Related List, Summary, Picker, and Global Search layouts
Opportunities	Related List, Summary, Picker, and Global Search layouts
Resources	Related List and Picker layouts
Task	Related List, Summary, Edit, and Global Search layouts
Custom Objects	Related List, Picker layouts

Consider the following:

- All fields that aren't already present in the default layout will be migrated to available empty slots in the layouts. If there are no empty slots on the layout, then the field won't be migrated.
- If you're migrating from a previous version of the CX Sales for Microsoft 365 add-in, then:
  - Saved searches aren't migrated, since the newer add-in uses Workspace saved searches. See the topic *How do I create and manage saved searches in classic Oracle Sales?* for more details about how to create and manage Workspace saved searches.
  - Field criteria on Edit layouts aren't migrated over to new add-in.

Here's how to migrate your existing customizations:

1. Sign in as the sales administrator or as a setup user.
2. Ensure that you're working in an active sandbox.
3. Go to **Navigator** > **Configuration** > **Application Composer** > **Productivity Applications Setup** > **Oracle Sales for Outlook**.

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4. Select **Import**, as highlighted in this example screenshot:
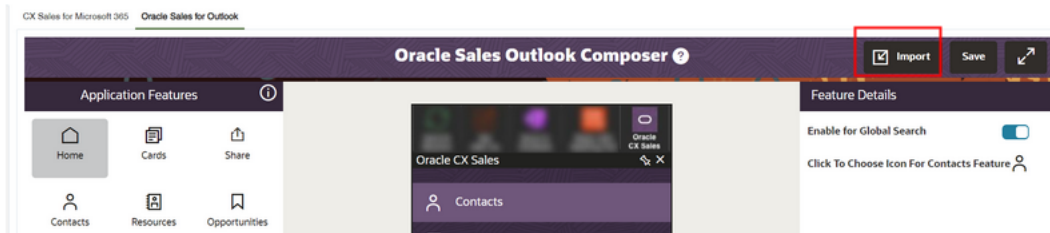
5. Specify whether you want to migrate your customizations from **CX Sales Mobile** or **CX Sales for Microsoft 365**.
6. Once the migration completes successfully, you can click **Download Report** and review your customizations as shown in this example image:
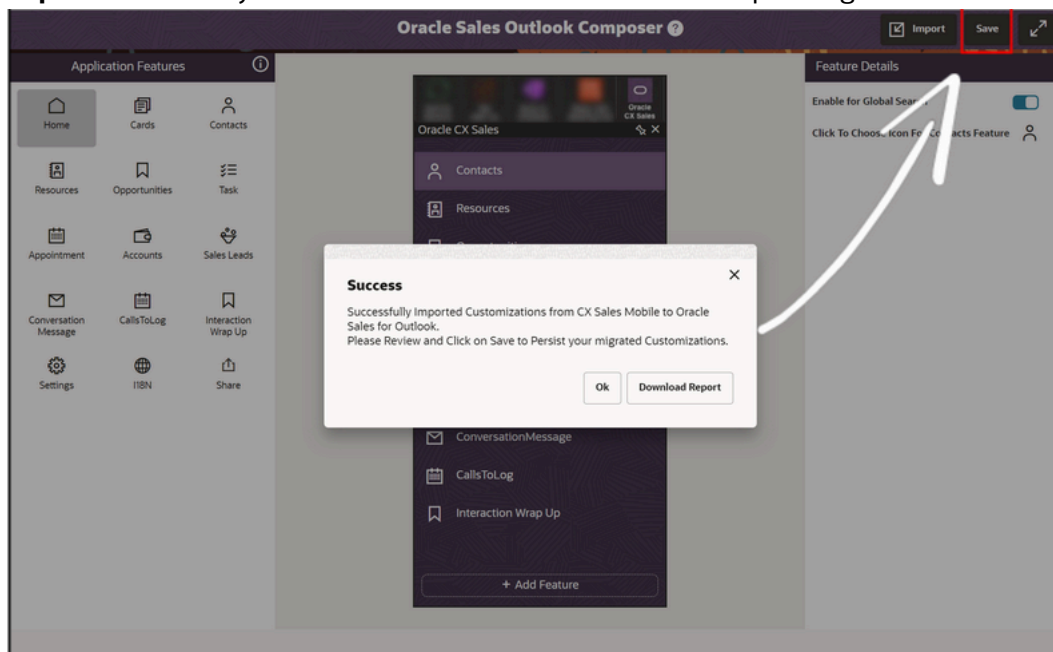
7. Click **Save**.

How can I add actions to a layout?

You can remove or add contextual actions while configuring any Related List or Summary Page Layouts.

Here's how:

1. Sign in as a sales administrator or as a setup user.
2. Ensure that you're working in an active sandbox.
3. Go to **Navigator** > **Configuration** > **Application Composer** > **Productivity Applications Setup** > **Oracle Sales for Outlook**.
4. Select the feature for which you want to add or remove actions. For example, click the Accounts feature.
5. In the Accounts View pane, select the type of page view. Actions are available on Related List or Summary Page Layouts. For example, click the Summary view.
6. In the Layouts pane, click the **Click to Clone** icon for the standard layout and enter a layout name that reflects the purpose of the layout

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7. In the interface designer, click the **Customize Contextual Actions** icon (three horizontal dots) as shown in the screenshot in the Summary Layout header section (or on Related List card) and remove the options that you don't want to appear by clicking the cross icon. This removes the options from the Summary Page for Accounts.
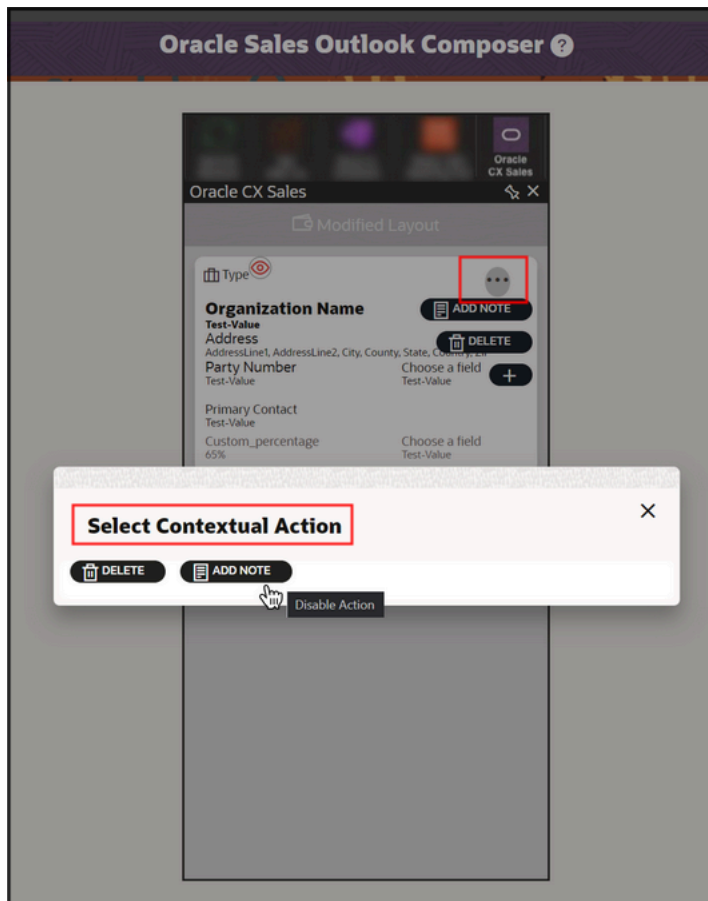
8. Click **Save**.
9. Test and publish your new page layout. See the *Test Your Configurations or Extensions* topic for details about how to check your Oracle Sales for Outlook configurations.

Can I deactivate the layout I created in Oracle Sales Outlook Composer?

Yes, you can deactivate the layouts you don't want in the composer.

To deactivate the layout, you need to select the tick icon on the layout page as highlighted in the screenshot. You can't deactivate standard layouts.

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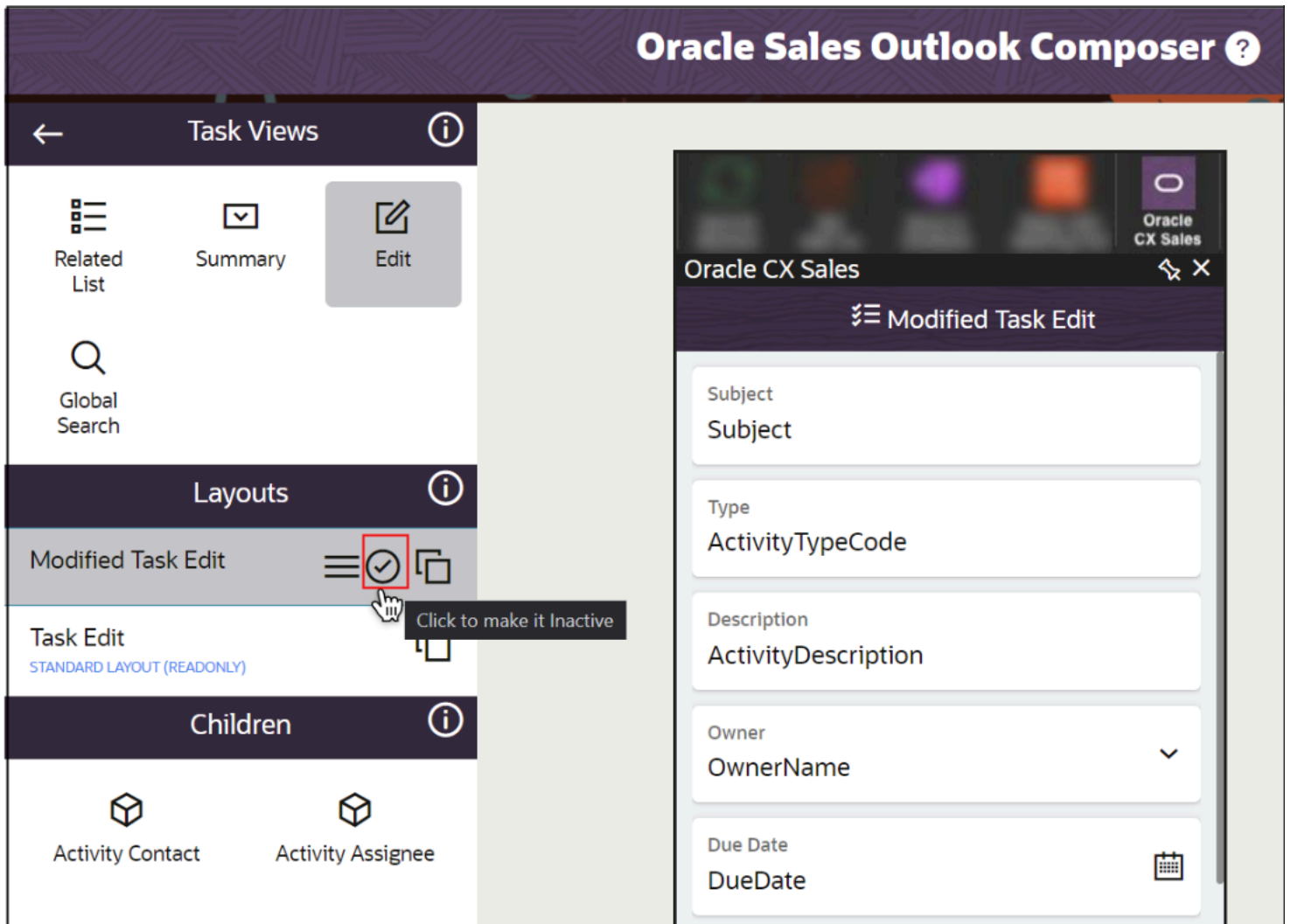
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Migration Overview

Migrating to the Microsoft 365 Integration for Oracle Sales Redwood User Experience provides a multitude of time-saving and efficiency benefits for salespeople. In addition, setting up and maintaining the new version of the Outlook add-in is easier than ever.

> **Note:** Be sure to review the *Migration Best Practices* and *Overview of Enabling the Microsoft 365 Integration* topics before starting the setup.

Here are the high-level migration steps:

1. *Set Up the Application in Microsoft Azure*

   For the integration, you need to create a new Microsoft application in Microsoft Azure. There are no changes to the setup steps in Microsoft Azure for the Redwood UX integration, compared to previous setup steps for the CX Sales for Microsoft 365 add-in. The main difference to be aware of is that this integration uses Microsoft Graph API permissions instead of Office 365 Exchange Online API permissions.

2. *Set Up the Integration in Application Composer*

   For the Redwood UX integration, a new step-by-step tool, outside of a sandbox, in Application Composer is provided to guide you through the steps to set up Microsoft application details, download the manifest, and configure your sync configurations.

3. *Review and Modify Data Synchronization Settings*

   Your existing sync settings are copied over from the earlier CX Sales for Microsoft 365 integration to the Redwood UX integration for easier migration. Review the sync settings in step 2 (synchronization settings) of the step-by-step tool in Application Composer. Additionally, some sync settings are no longer on the sync settings step as they're preconfigured for this new integration.

   If you're testing this integration and the earlier CX Sales for Microsoft 365 add-in is still active for your users, then you should be aware that some sync settings you change in the sync configuration page for the Redwood UX Microsoft 365 integration will be copied to the Manage Microsoft 365 setup task for the CX Sales for Microsoft 365 integration. See *Sync Setting Differences Between Previous and New Versions* for more details.

   The existing Microsoft 365 Standard Sync and Microsoft 365 Instant Sync scheduled processes can continue to be scheduled and run. If a user has signed in to the Redwood UX add-in, then the sync jobs will automatically use the new synchronization settings that you configure in Application Composer. In addition, if a user is signed in to the CX Sales for Microsoft 365 add-in, then the sync jobs will use the sync settings configured in the Manage Microsoft 365 page in Setup and Maintenance.

4. *Migrate Your Add-In Configurations*

   If you've configured layouts in the CX Sales Mobile app or in the CX Sales for Microsoft 365 add-in, you can simply import the layouts into this integration using the Oracle Sales for Outlook tool in Application Composer. See *How to Migrate Your Existing Customizations* for more information. You can then review your customizations and further customize the add-in as needed.

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5. *Test and Validate*

   Note that during UAT or pilot testing, the Redwood UX add-in can be deployed alongside the CX Sales for
   Microsoft 365 add-in. However, Oracle recommends that you don't enable both add-ins for your users. After
   successful migration, disable the previous version of the add-in.

6. *Test the Integration*

Note: In addition to these steps, consider integrating the email client you're using with Microsoft Exchange. Exchange
and email work together. See *Microsoft Exchange Email Integration in Oracle Sales* for more information.

Migration Best Practices

Review these best practices for the migration before you start to migrate CX Sales for Microsoft 365 integration to the
Oracle Sales Redwood UX for Microsoft 365 integration:

Note: Be sure to review the *Overview of Enabling the Microsoft 365 Integration* before migrating. In particular,
don't use the same email account against different instances, such as your stage environment and your production
environment.

- The integration uses Microsoft Graph APIs; therefore, you need to register a new app in Microsoft Azure with
  Microsoft Graph APIs permissions. See *Set Up the Integration in Application Composer* for more information.

- You don't need to reschedule your Microsoft 365 Standard and Instant sync processes. You can find more
  information about the sync processes in *Review and Modify Data Synchronization Settings*, *Run Sync Scheduled
  Processes*, and the *section on sync* in this guide.

- During testing, the Oracle Sales for Outlook add-in (new version) can be deployed alongside the CX Sales for
  Microsoft 365 add-in (previous version). **However, in production, you should not enable both add-ins for
  the same users.**

  Before you deploy the new version of the application to users, you should remove the users from the CX Sales
  for Microsoft 365 add-in and add those users to the new Oracle Sales for Outlook add-in.

  Find more information about deploying and testing in *Deploy the Add-In in Microsoft* and *Test the Integration*.

- Be aware that some sync settings are shared between the previous version and the Redwood UX Microsoft 365
  integration. Changing them will impact both integrations. The sync jobs will run based on which add-in the user
  is currently signed in to:
  - If the last successful add-in the user signed into is the Oracle Sales for Outlook add-in (latest version),
    then the Redwood UX sync will run.
  - If the last successful add-in the user signed into is to the CX Sales for Microsoft 365 add-in (previous
    version), then the CX Sales for Microsoft 365 sync will run.

  See *Sync Setting Differences Between Previous and New Versions* for more information on the sync differences
  between the two versions of the add-in.

- The Microsoft 365 Monitor displays the users who are using the Oracle Sales Redwood UX for Microsoft 365.
  See *Use Microsoft 365 Monitor to Manage Sync and Users* for more information.

- In the previous version of the add-in, emails were stored as completed tasks. In the latest version, they're stored
  as conversation messages in the Interactions object.

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Sync Setting Differences Between Previous and New Versions

During migration, the sync settings from the existing Manage Microsoft 365 setup task are copied over to the new sync configuration page.

You can review the sync configurations and make further updates to the sync configurations in the new Oracle Sales for Outlook step-by-step tool available in **Application Composer** > **Productivity Applications Configurations**. In addition to reviewing the settings that have been migrated, there are also new settings that require your attention.

Settings That Are New and Require Setup

Here are the settings that are new to this integration and require your setup:

- Default Appointment Saved Search
- Default Contact Saved Search
- Default Task Saved Search

   Note: This integration uses Workspace saved searches to sync records from Oracle to Exchange. These settings allow administrators to set the default saved search for all their users. For more information about enabling Workspace, see *What are the Adaptive Search setup UI components?*.

- Email Sync Settings:
   - Enable sync

Setting That Isn't Migrated and Requires Setup

This setting isn't migrated and requires your setup:

- Enable Microsoft Application Permission (previously named "Enable Application Permission")

Settings That Are Migrated and Copied

Here are the settings that will be migrated and copied between the Microsoft 365 for Redwood UX integration and the CX Sales for Microsoft 365 integration:

Note: During the testing phase, if both the previous CX Sales for Microsoft 365 add-in and the new Redwood UX add-in are deployed, then any changes to the following settings in the Manage Microsoft 365 task or in the Sync Configuration page in Application Composer will impact both deployments.

- Include Attachments in Sync
- Attachment Size Limit (in MB)
- Appointment Sync Settings:
   - Enable Sync
   - Enable Autocapture Appointments from Exchange (previously named "Auto Capture Appointments")

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- Include Appointments with No Attendees (previously named "Capture Appointments with Empty Invitee List")

- Include Private Meetings (previously named "Include Private Appointments from Outlook")

- Appointment Sync Limit (previously named "Limit" in the Appointments section)

- Enable Bidirectional Sync

- Email Sync Settings:
  - Autocapture replies to shared emails (previously named "Enable Auto Capture of Email Responses")

- Contact Sync Settings:
  - Enable Sync

  - Allow Sync to Create Oracle Sales Contacts (previously named "Allow Sync to Create CX Contacts")

  - Contact Sync Limit (previously named "Limit" in the Contacts section)

- Task Sync Settings:
  - Enable Sync

  - Allow Sync to Create Oracle Sales Tasks (previously named "Allow Sync to Create CX Tasks")

  - Allow Sync to Delete Oracle Sales Tasks (previously named "Allow Sync to Create CX Tasks")

  - Task Sync Limit (previously named "Limit" in the Tasks section)

Setting That Is Migrated but Not Copied

This setting doesn't get copied back to the new Application Composer tool, nor vice versa:

- Allow Users to Override Default Saved Search (Previously named "Allow Users to Select Default Saved Search")

Settings That Are Preconfigured or Have Fixed Values

When you migrate to the Redwood UX add-in, you'll notice that some sync settings are redefined and some settings now have default values that you can't change, making your implementation easier to set up and improving the sync experience for your users.

Here are the settings that are preconfigured for you and no longer require your configuration:

- Allow Users to Override Default Conflict Resolution

- Enable Add-in Usage Tracking

- Enable Synchronization Tracking

- Enable Dynamic Batching for Sync

- Allow Sync to Create CX Appointments

- Allow Sync to Delete CX Appointments

- Allow Invitees to Share Appointments

- Include Private Tasks from Outlook

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This setting is redefined to provide a better sync experience:

- Default Conflict Resolution: The "User Selected" option is no longer required, and if "User Selected" is set in the CX Sales for Microsoft 365 integration, after migration, "CX Server Wins" will be set for the Redwood UX for Microsoft 365 integration.

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Chapter 7
Troubleshoot Issues

7 Troubleshoot Issues

Can I manually share a past appointment from Outlook in bidirectional sync?

If a past appointment has the Shared with Oracle category, you can share the appointment manually with the sales application.

However, updates you make to the past appointment aren't synced to the sales application.

Why didn't my email replies get shared with the sales application?

If the subject of an email is modified or deleted, Outlook doesn't recognize that email as an in-reply-to email.

These email replies aren't shared in the original email thread that was shared with Sales.

See the *Automatically Share Email Responses of Manually Shared Emails* topic to learn more.

What happens if I manually remove the Shared with Oracle category for a past appointment in Outlook?

In bi-directional sync, even if you manually remove the Shared with Oracle category for a past appointment in Outlook, the appointment won't be deleted from the sales application.

In one-way sync, when you remove the category of a past appointment, the copy shared with the sales application is deleted.

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