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Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Using Applications Help

Use help icons ? to access help in the application. If you don’t see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access Oracle Applications Help.

Watch: This video tutorial shows you how to find help and use help features.

You can also read Using Applications Help.

Additional Resources

- **Community:** Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.
- **Guides and Videos:** Go to the Oracle Help Center to find guides and videos.
- **Training:** Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
</tbody>
</table>

Documentation Accessibility

For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website.

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.
Contacting Oracle

Access to Oracle Support
Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions
Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 About This Guide

Audience and Scope

This guide is intended for anyone who is using Oracle Sales Cloud for Outlook. The using guide describes how to use all the features of Oracle Sales Cloud for Outlook. The guide includes the following aspects of using Oracle Sales Cloud for Outlook:

- Using basic and advanced features
- Viewing and using Oracle Sales Cloud records
- Synchronizing between Oracle Sales Cloud and Outlook
- Creating and deleting records on Outlook

Related Guides

Refer to the related guides list in the following table to understand more about Oracle Sales Cloud for Outlook.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Sales Cloud Using Sales</td>
<td>Provides help to salespeople in performing day-to-day tasks.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Extending Sales</td>
<td>Provides help to administrators in creating user-defined configurations in Oracle Sales Cloud.</td>
</tr>
</tbody>
</table>

Related Topics

- Oracle Help Center
2 Getting Started

Overview of Oracle Sales Cloud for Outlook

The Oracle Sales Cloud for Outlook application helps maximize sales productivity by providing Oracle Sales Cloud capabilities directly within Microsoft Outlook, thereby allowing sales professionals access to essential Sales Cloud data.

Summary of Features

The following table lists the key features of Oracle Sales Cloud for Outlook.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Cloud capabilities within Microsoft Outlook</td>
<td>Using Oracle Sales Cloud for Outlook, all emails, calendar events, and tasks can be linked to the respective contact, customer, lead, or opportunity within Oracle Sales Cloud. Sales professionals can access and update customer and sales information within Microsoft Outlook.</td>
</tr>
<tr>
<td>Single-click sharing between Microsoft Outlook and Oracle Sales Cloud</td>
<td>When sending a meeting invite or an email, or when setting up a task, a single click on the Share with Oracle Sales Cloud button captures the action and updates of Oracle Sales Cloud in the background.</td>
</tr>
<tr>
<td>Synchronization of data between Oracle Sales Cloud and Microsoft Outlook</td>
<td>Two-way data synchronization allows sales professionals to have a continuously updated and accurate 360-degree view of Sales Cloud data changes.</td>
</tr>
<tr>
<td>Synchronization Control Panel</td>
<td>Oracle Sales Cloud for Outlook provides synchronization filtering capabilities, enabling sales professionals to synchronize only the most critical data from Oracle Sales Cloud. Sales professionals can synchronize high-priority accounts or opportunities closing this quarter, instead of synchronizing the entire data set from Oracle Sales Cloud.</td>
</tr>
<tr>
<td>Offline access</td>
<td>The transition between online and offline modes of operation allows sales professionals in the field to use the full functionality of the product in an offline mode, and then synchronize the sales data in the next synchronization cycle.</td>
</tr>
<tr>
<td>User-defined configuration for Oracle Sales Cloud for Outlook:</td>
<td>Add to the standard Microsoft Outlook view, or rearrange how the page looks, using Oracle Sales Cloud for Outlook’s user-defined objects, fields, and User Interface layout options. For example, user-defined objects or objects that you rely on can be added to the application to cater to specific organizational or user requirements.</td>
</tr>
</tbody>
</table>

Related Topics

- Implement Oracle Sales Cloud for Outlook: Explained
3 Working with Accounts

Accounts Menu on Oracle Sales Cloud for Outlook: Explained

This topic explains the menu options available on the Accounts page. You can create an account, send emails, and schedule appointments with contacts and sales teams. You can also create other Oracle Sales Cloud records such as an opportunity. The following table explains the Accounts menu.

<table>
<thead>
<tr>
<th>Buttons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Account</td>
<td>Opens the Accounts form and creates a new account.</td>
</tr>
<tr>
<td>New Sales Cloud Item</td>
<td>Creates an Oracle Sales Cloud contact, lead, or opportunity from the Accounts page.</td>
</tr>
<tr>
<td>Send Email to Contacts</td>
<td>Sends an email to all contacts that are part of the account.</td>
</tr>
<tr>
<td>Send Email to Sales Team</td>
<td>Sends an email to members of the sales team associated with the account.</td>
</tr>
<tr>
<td>Schedule Meeting with Contacts</td>
<td>Schedules a meeting with all contacts that are part of the account.</td>
</tr>
<tr>
<td>Schedule Meeting with Sales Team</td>
<td>Schedules a meeting with members of the sales team associated with the account.</td>
</tr>
</tbody>
</table>

Managing Accounts on Oracle Sales Cloud for Outlook: Explained

You can create, modify, and delete an Oracle Sales Cloud account using Oracle Sales Cloud for Outlook.

Creating an Account

You can create an account in the following ways:

- Right-click and select New Account on the Accounts page.
- Click the New Account button on the Oracle Sales Cloud for Outlook menu.
- Use the Account field on the opportunity lead, or task forms, to create an account.
- Use a shared email message to create an account from the Account field on the shared email form.
When you create an account, you’re automatically assigned as the primary member of the customer team.

On the Account form, enter all the account details. If you want your account to be a sales account, you must select the purpose of the account from the Purpose drop-down list on the Check Address dialog box.

You can optionally specify the customer detail for your account. You can also add additional team members to the customer as follows:

1. Click the **Lookup** icon next to the **Customer Team** field.
2. On the Resource Lookup dialog box, click **Search in Sales Cloud** to search for the available customer teams on Sales Cloud.
3. On the Resource Online Lookup dialog box, search for the salesperson whom you want to add to the sales team.
4. Select the salespeople you want and click **OK**.

The selected salespeople appear in the **Customer Team** field.

**Modifying an Account**

To modify an account, open the account, make your changes and click **Save and Close**. To share your changes in Oracle Sales Cloud immediately, run the synchronization process.

**Deleting an Account**

You cannot delete an account from Oracle Sales Cloud through Outlook. You can only remove an account from the Contacts folder on Outlook. However, all references to the account on other objects remain as they are.
4 Working with Contacts

Contacts Menu on Oracle Sales Cloud for Outlook: Explained

This topic explains the menu options available on the Contacts page. You can create a contact, send emails, and schedule meetings with contacts. You can also create other Oracle Sales Cloud records, such as an opportunity.

The following table explains the Contacts menu.

<table>
<thead>
<tr>
<th>Buttons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Outlook Contact</td>
<td>Opens the Native Outlook Contact form and creates a new Outlook contact.</td>
</tr>
<tr>
<td>New Sales Cloud Contact</td>
<td>Opens the Oracle Sales Cloud Contact form and creates a new Oracle Sales Cloud contact.</td>
</tr>
<tr>
<td>New Sales Cloud Item</td>
<td>Creates an Oracle Sales Cloud account, lead, or opportunity from the Contacts page.</td>
</tr>
<tr>
<td>Send Email to Contact</td>
<td>Sends an email to a contact.</td>
</tr>
<tr>
<td>Schedule Meeting with Contact</td>
<td>Schedules a meeting with a contact.</td>
</tr>
<tr>
<td>Manage Contact Duplicates</td>
<td>Sets criteria for duplicate detection.</td>
</tr>
</tbody>
</table>

Managing Contacts on Oracle Sales Cloud for Outlook: Explained

You can create, modify, and delete an Oracle Sales Cloud contact using Oracle Sales Cloud for Outlook.

Creating a Contact

After you install Oracle Sales Cloud for Outlook, click **New Contact** to create an Oracle Sales Cloud contact. If you want to create an Outlook contact, you must click **New Outlook Contact** on the Oracle Sales Cloud for Outlook menu.

You can create a contact in the following ways:

- Right-click and select **New Contact** on the Contacts page.
- Click the **New Contact** button on the Oracle Sales Cloud for Outlook menu.
- Use the Contacts Lookup icon on the Account, Opportunity, Lead, or Task forms, and click Add Contact to create a contact.
• Click the **New Outlook Contact** or **New Sales Cloud Contact** button.

When you create a contact, you’re automatically assigned as the primary member of the contact team.

To create a contact:

1. On the Contacts form enter all the contact details, such as name, account, and address.
2. Optionally, associate your contact with an account.
3. Optionally, create tasks, notes, or appointments.
4. Click **Save and Close**.

**Modifying a Contact**

To modify a contact, open the contact, make all your changes and click **Save and Close**. To share your changes on Oracle Sales Cloud immediately, run the synchronization process.

**Deleting a Contact**

You can’t delete a contact from Oracle Sales Cloud through Outlook. You can only remove a contact from the Contacts folder on Outlook. However, all references to the contact on other objects remain as they are.

**Outlook and Oracle Sales Cloud Contact Forms: Critical Choices**

You can create an Outlook contact or an Oracle Sales Cloud contact from Oracle Sales Cloud for Outlook. You can use one of the following forms to create your contact depending on your scenario:

• Native Outlook Contact Form
• Oracle Sales Cloud Contact Form

**Native Outlook Contact Form**

If you want to create a contact that you do not want to share with Oracle Sales Cloud, such as your personal contacts, use the native Outlook contact form. The native contact form that is available on Outlook does not include any of the Oracle Sales Cloud fields. On the Contacts page, click **New Outlook Contact** on the Outlook menu to create an Outlook contact. Contacts that you create on this form are not shared with Oracle Sales Cloud during synchronization.

You must convert these contacts to Oracle Sales Cloud contacts to share them with the Oracle Sales Cloud server. When you convert your contact to an Oracle Sales Cloud contact, ensure that you enter all the mandatory fields for an Oracle Sales Cloud contact. If mandatory fields are missing, these contacts are not shared with the Oracle Sales Cloud server although they appear in the Oracle Sales Cloud contacts list.

**Oracle Sales Cloud Contact Form**

If you want to create a contact for Oracle Sales Cloud, use the Oracle Sales Cloud contact form. On the Contacts page, click **New Contact** or **New Sales Cloud Contact** on the Outlook menu to create an Oracle Sales Cloud contact. The Oracle Sales Cloud contact form contains both native Outlook fields and Oracle Sales Cloud fields, such as account, opportunities,
and leads. The contacts that you create using the Oracle Sales Cloud contact form are shared with Oracle Sales Cloud during the next synchronization.

The following figure shows icons that indicate the status of contacts.

![Contact Icons](image)

The following table describes the statuses of different contacts.

<table>
<thead>
<tr>
<th>Contact</th>
<th>Icon</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anne Balmer</td>
<td>Shared Sales Cloud contact</td>
<td>An Oracle Sales Cloud contact that is synchronized with Oracle Sales Cloud.</td>
</tr>
<tr>
<td>Fen Lee</td>
<td>Un-shared Sales Cloud contact</td>
<td>Displayed in the Oracle Sales Cloud contact list but not synchronized with Oracle Sales Cloud due to missing fields. This status indicates that the converted Outlook contact does not contain all fields required for the Oracle Sales Cloud Contact.</td>
</tr>
<tr>
<td>John Gorman</td>
<td>Native Outlook contact</td>
<td>A native Outlook contact not synchronized with Oracle Sales Cloud.</td>
</tr>
</tbody>
</table>

**Outlook and Oracle Sales Cloud Contacts Conversion: Points to Consider**

You can convert all your native Outlook contacts to Oracle Sales Cloud contacts when you set up Oracle Sales Cloud for Outlook. You can also convert your Outlook contacts to Oracle Sales Cloud contacts at any time later. You can convert Oracle Sales Cloud contacts to Outlook contacts only if they’re not synchronized with the Oracle Sales Cloud server. Before converting your contacts, consider the impact on the address fields resulting from the conversion.

**Effects of Converting Outlook Contacts to Oracle Sales Cloud Contacts**

Converting a native Outlook contact to an Oracle Sales Cloud contact results in changes, as described in the following table.
Address on Outlook Contact | Impact on Oracle Sales Cloud Contact
--- | ---
Business and Home addresses are defined. | The Home address becomes the primary or business address. The Business address becomes a personal address.
Either the Business or the Home address is defined. | The defined address becomes the primary address.
The Other address is defined. | The address isn’t converted.

### Effects of Converting Oracle Sales Cloud Contacts to Outlook Contacts
Converting an Oracle Sales Cloud contact to a native Outlook contact results in changes, as described in the following table.

<table>
<thead>
<tr>
<th>Address on Oracle Sales Cloud Contact</th>
<th>Impact on Outlook Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>The primary business address is defined.</td>
<td>The primary business address becomes the Business address of the Outlook contact.</td>
</tr>
<tr>
<td>The primary business address isn’t defined.</td>
<td>The Business address of the contact before conversion remains the same.</td>
</tr>
<tr>
<td>The primary personal address is defined.</td>
<td>The address becomes the Home address of the native contact.</td>
</tr>
</tbody>
</table>

### Can I convert an Outlook contact to an Oracle Sales Cloud contact?
Yes. Click the Contacts folder, select the contacts you want to convert from the list of contacts on the Contacts page, and click Convert to Sales Cloud on the Outlook menu.

### Can I stop sharing a contact with Oracle Sales Cloud?
Yes, you can stop sharing a contact with Oracle Sales Cloud if it has not been synchronized with the Oracle Sales Cloud server. To stop sharing, click the Contacts folder, select the contact you want to stop sharing from the list of contacts on the Contacts page, and click Undo Contact Conversion on the Outlook menu.
Can I convert an Oracle Sales Cloud contact to an Outlook contact?

Yes. Click the **Contacts** folder, select the contacts you want to convert from the list of contacts on the Contacts page, and click **Undo Contact Conversion** on the Outlook menu.

Managing Conflicts and Duplicates During Synchronization: Worked Example

This example demonstrates how to manage conflicts and duplicates that you may experience during synchronization between Oracle Sales Cloud and Outlook.

The following table summarizes key decisions for a scenario where you manage conflicts and duplicates during synchronization.

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>In This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>When do you want to synchronize?</td>
<td>As soon as the updates are complete.</td>
</tr>
<tr>
<td>Which synchronization option should you run?</td>
<td>Synchronize All Changes</td>
</tr>
</tbody>
</table>

**Task Summary**

This worked example includes details of the following tasks that you perform to resolve conflicts and duplicates:

1. Creating a contact and updating an opportunity.
2. Resolving the conflict.
3. Resolving the duplicate
4. Synchronizing your changes.
5. Verifying your changes.

**Creating a Contact and Updating an Opportunity**

To create a contact and update an opportunity:

1. Create a contact called Mark Foley.
2. Update the sales stage on the Pinnacle Server Upgrade opportunity to Negotiation.
   
   You have just had a conversation with your customer and you know there is a high probability that this opportunity will close.

3. Synchronize all changes to update your changes on Oracle Sales Cloud.
The following figure shows the Synchronization Control Panel that displays a conflict and a duplicate.

Resolving the Conflict

The sales stage on the opportunity was also updated on Oracle Sales Cloud since the last synchronization. Although a salesperson has updated the sales stage to Presentation on Oracle Sales Cloud, you would like to go with your update as it is based on your recent conversation with the customer.

1. Select the Outlook check box on the Synchronization Control Panel to retain your changes.
2. Click Synchronize Now. Optionally, you can synchronize after you resolve the duplicate.
Resolving the Duplicate

You can resolve a duplicate contact. When you save a contact and the contact already exists on Oracle Sales Cloud, then you can either retain the Oracle Sales Cloud contact or create another contact.

Although all fields are identical, the Oracle Sales Cloud record also has the amount selected. Therefore, you decide to retain the Oracle Sales Cloud record. To resolve the duplicate contact:

1. Select the **Sales Cloud** check box on the Synchronization Control Panel to retain the updates made on Oracle Sales Cloud.
2. Click **Synchronize Now** to synchronize and resolve the conflict and duplicate.

Verifying Your Changes

To verify whether your changes are correct:

1. Open the contact Mark Foley on Outlook. The account name is now selected for this record. You have now verified that the Oracle Sales Cloud record is synchronized with Outlook.
2. Navigate to the Pinnacle Server Upgrade opportunity on Oracle Sales Cloud. The sales stage is Negotiation. You have now verified that the Microsoft Outlook record is synchronized with Oracle Sales Cloud.
Related Topics

- Managing Conflicts and Duplicates During Synchronization