

Installing Sales Cloud Microsoft Outlook Plug-in

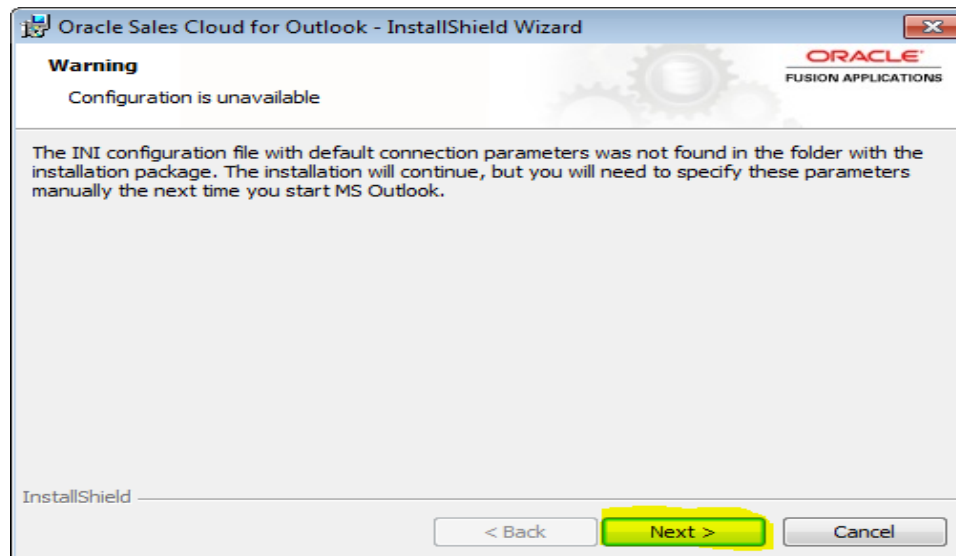
Please read through these direction before doing anything. If you have question contact support@senecaco.com

1. Unzip Install File

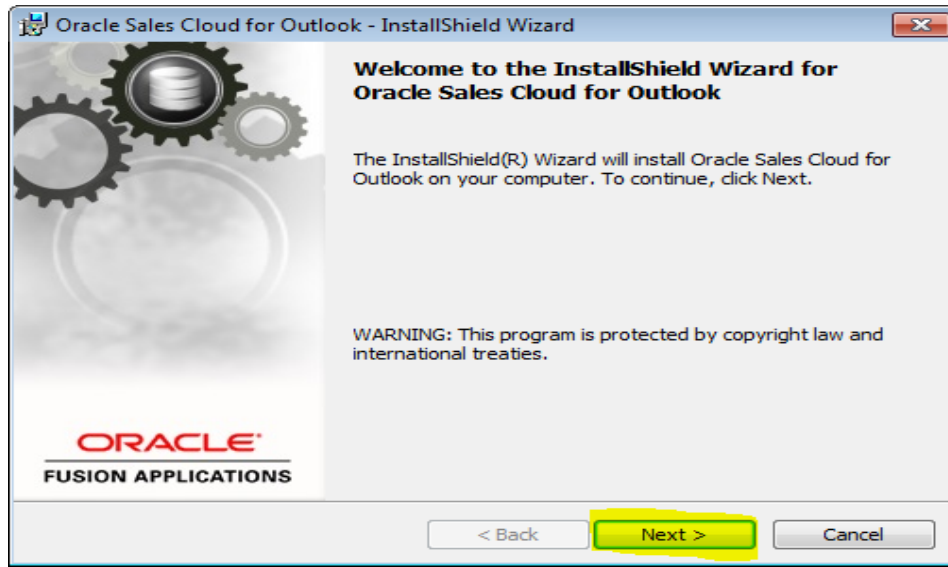
- a. Drag the FusionCRMForMicrosoftOutlook.zip to your Desktop
- b. Right Click on the zip folder and select Extract All
- c. Click Extract
- d. Open the unzipped folder on your desktop

2. Install "FusionCRMForMicrosoftOutlook"

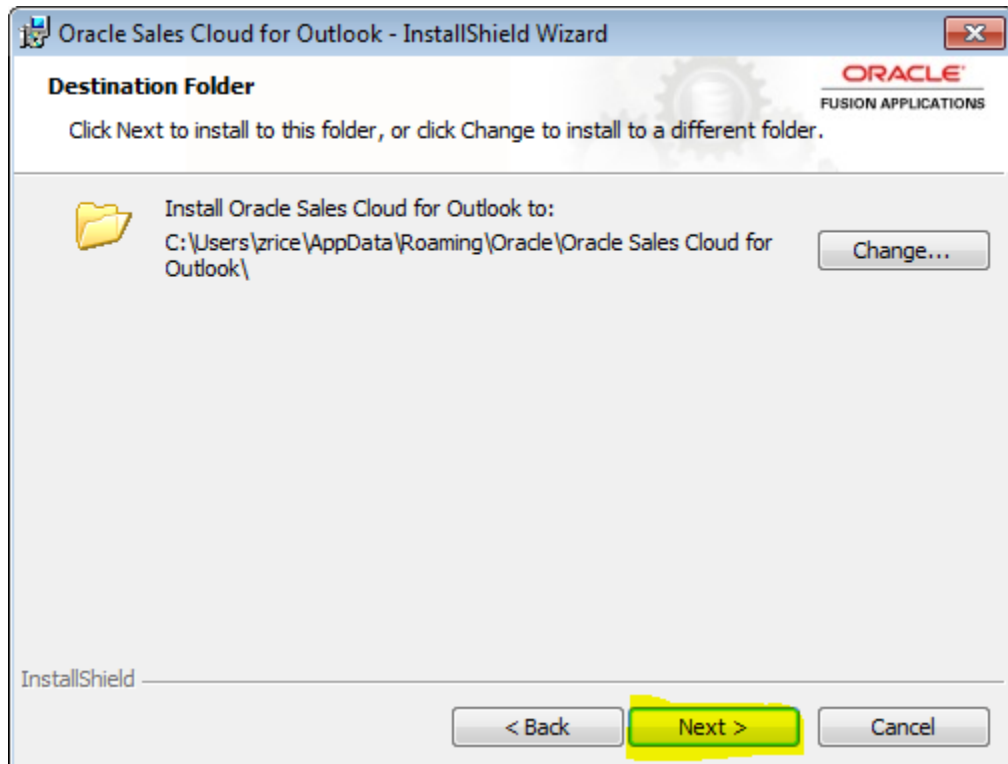
- a. Double Click on the file FusionCRMForMicrosoftOutlook.msi
- b. Click Next



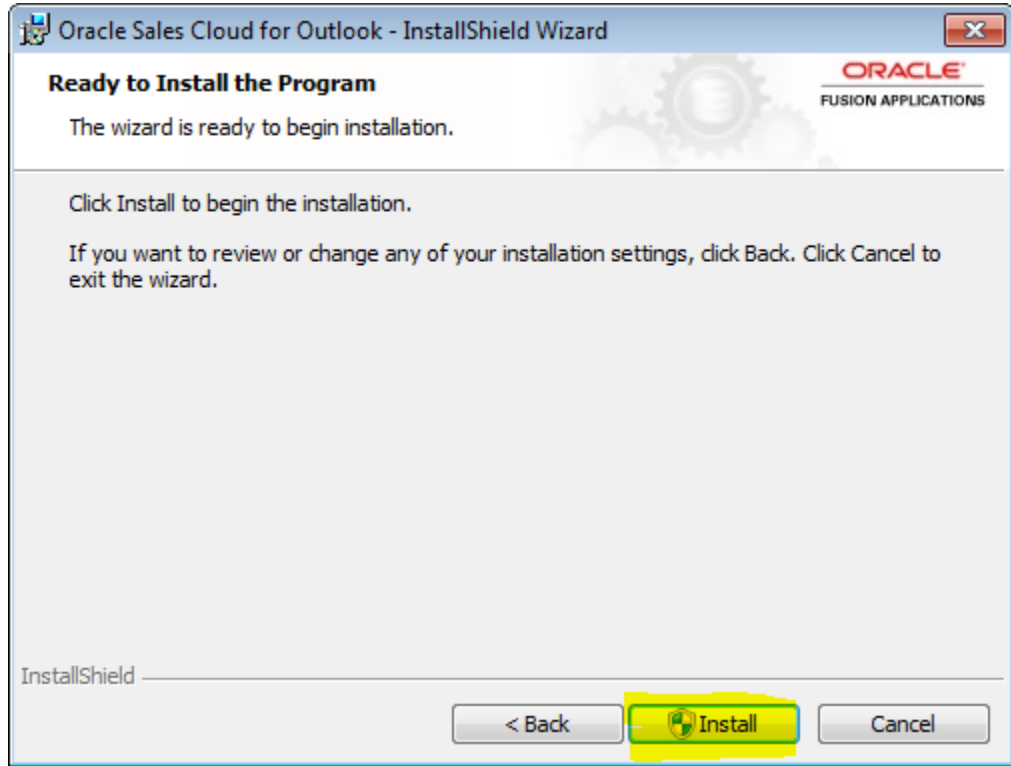
c. Click Next



d. Click Next



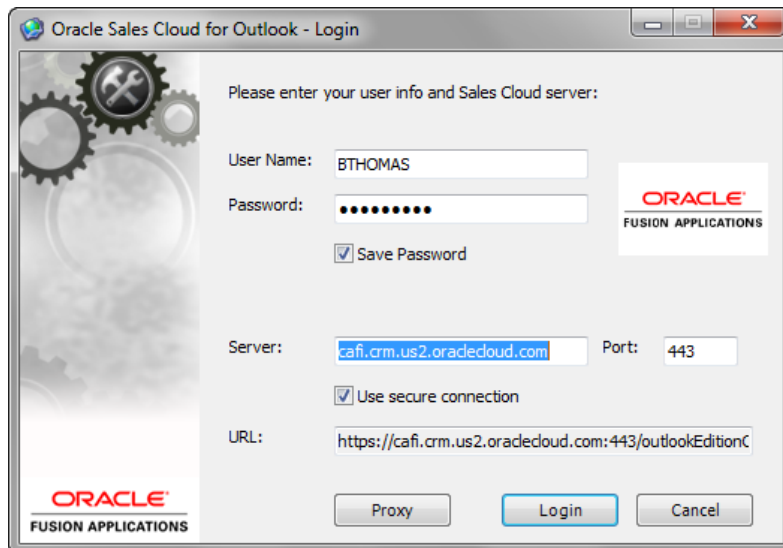
- e. Click Install



- f. After the install completes, Click Finish

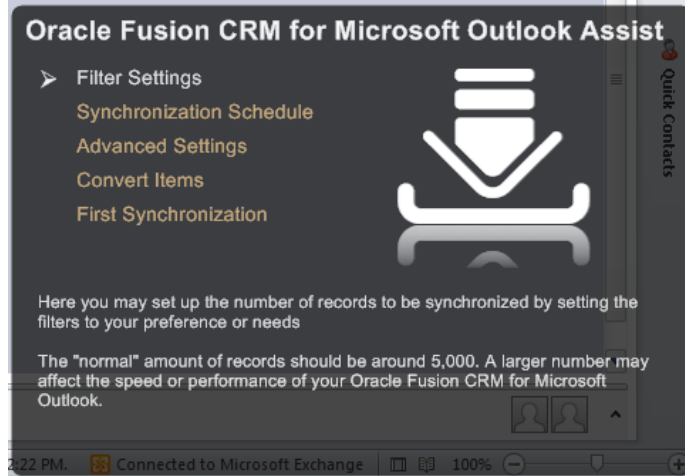
3. Setup the plug-in

- a. Enter the details as follows:
 - i. Enter your user name and password

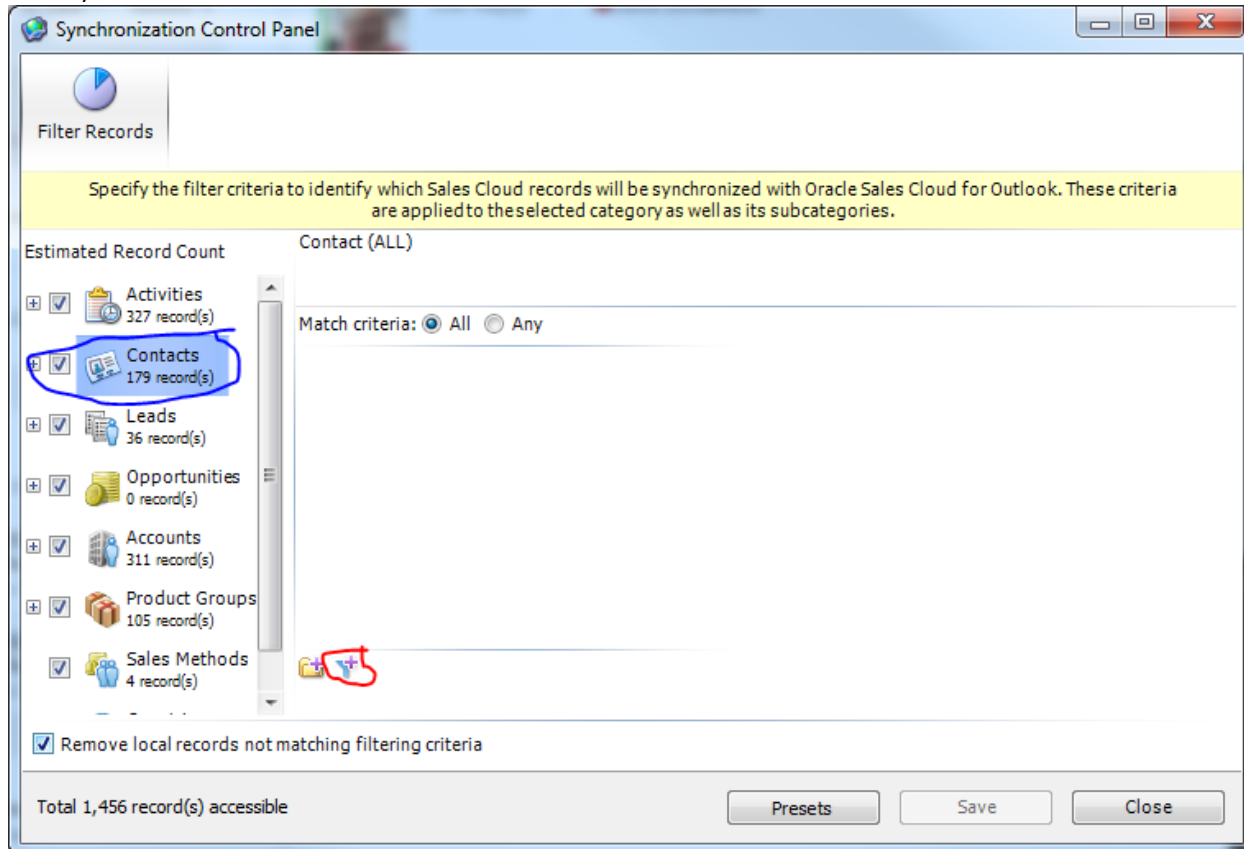


- ii. Click Login.

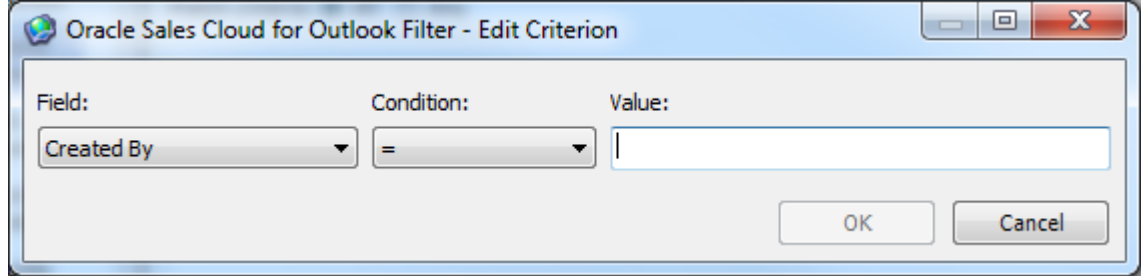
- iii. Once successfully registered, Oracle Fusion CRM for Microsoft outlook will install the features within your Microsoft outlook.
- b. You will now see the Microsoft Outlook Assist window in the bottom corner of Outlook. Click on the box to begin the process.



- c. Uncheck 'Product Groups' in the column on the left.
- d. Click on Contacts (circled in blue below) > then select the filter icon (Circled in red below)

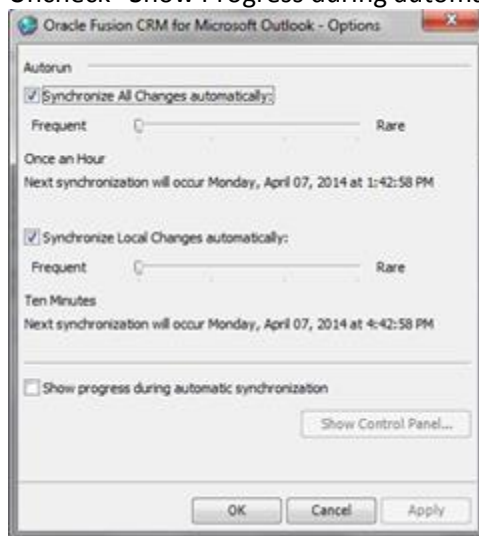


- e. In the new window that pops up select the Field “Created By” > in the Value box type in your Sales Cloud user name

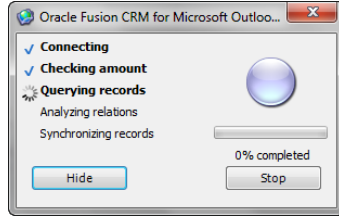


- f. Click OK
- g. Click Save
- h. Click Close

- i. You may now define your sync settings.
 - i. Synchronize All Changes is the sync frequency of data from Outlook to CRM and CRM to Outlook. Select an option.
 - ii. Synchronize Local Changes is the sync frequency of data from Outlook to CRM only. Select an option.
 - iii. The Show progress... checkbox will enable a popup to let you know when the sync is occurring. Keep this enabled until you are more familiar with the application.
- j. Uncheck “Show Progress during automatic synchronization” then Click OK.



- k. Uncheck the boxes to always sync Appointments, Contacts and Tasks. Leave the defaults for logging. Click OK.
- l. The initial sync will immediately begin. This is the pop-up window from 8.c. above and can be disabled later if you don't want to view sync progress.



- m. You will now have the Sales Cloud Ribbon on the top right bar in Outlook. Additionally click on Contacts in the bottom left to view Customers, Leads and Opportunities which have been synced.

