

Q!365

Administration Guide

- PREVIEW -

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Executive Summary

This document describes the steps needed to set up the Q!365 App and to customize the Q!365 functionality. These steps include details to configure Microsoft Azure, Microsoft 365 and Salesforce.

To the end user, they are now able to fully take advantage of several Document Management benefits of SharePoint Online while staying within the Salesforce user interface.

Feature Overview

Tree-view based dedicated resource tabs for linked content:

- Inherited Relations
- Folders
- Sites
- Document Libraries
- Channels

Dedicated Search Endpoint:

- Company Profiles
- Joined Teams and Channels
- Company Default Sharepoint Site
- Sites
- Document Libraries

Sharepoint & Teams Features:

- Upload Files to Folders, Sites, Libraries and Channels. Supports Multi-file upload as well as automatic versioning of your files
- Delete Files from Folders, Sites, Libraries and Channels.
- Share Files, Folders, Sites, Document Libraries with Externals

Microsoft Teams features:

- Create Teams Meetings (Personal & Channel)
- Integrate Teams Meetings in Salesforce Events or any other Objects
- Chatter Integration for linked Channels
- Use the brand new Salesforce Teams Integration to add Salesforce Records to your Channels in one click

Developer Tools:

- Fetch contents across your entire Microsoft 365 ecosystem
- Create Folders, Sites, Teams, Channels or Groups
- Initiate Sharing
- Create Teams Meetings (Personal & Channel Meetings)
- Post messages to Teams Channels
- Add Team members
- Retrieve Channel Messages

... and many more

1 Installation

At first you'll need to login to the Salesforce org in which you're about to install Q!365. For the next step go to the Q!365 page on AppExchange:

[Q!365 @ AppExchange](#)

The screenshot shows the AppExchange listing for Q!365. At the top, there's a header with the Q! logo, the title "Q!365 | Integrate Microsoft 365, Teams & SharePoint", the developer "By QKorn GmbH", and a description "Salesforce Integration for Microsoft Teams, SharePoint and Office 365". Below this is a 5-star rating with "5 Average Rating (15 Reviews)".

The main content area is divided into sections: "Business Need" (Integration), "Supported Features" (No Limits, Lightning Ready), and "Pricing" (Starting at €3.6 EUR/user (25 users min.)/month). There are "Get It Now" and "More" buttons. A description states: "Stay focused in Salesforce and work directly with your data in Teams, SharePoint Sites and Document Libraries. With only one click to work with latest versions of your files. Supports all Salesforce Editions, including Mobile and Communities."

Below the pricing section are three tabs: "Overview", "Reviews", and "More Details". Under the "Overview" tab, there are three video thumbnails, each with a "Watch Video" button. The thumbnails are titled "Showcase", "Automated SharePoint Integration Made Easy", and "The Community Edition".

Click on Get it Now and choose whether you want to install it into a production or sandbox environment. A confirmation window will pop up.

Make sure you've selected the correct shape of environment. You'll also be asked to agree to the terms and conditions on this page. It should take less than a minute to install the package.

Note:

Over the course of the installation process you'll be asked to confirm two Remote Site Settings which will then be included in your environment. These settings are required in order to work with Q!365.

Note:

The trial expires after 30 days. Please feel free to [contact](#) us to extend this period. To see the Expiration Date head over to: Setup > Apps > Installed Packages in your Salesforce Setup.

2 Configuration Backend

2.1 Auth Provider

From the Setup go to Identity > Auth. Providers and click on the Q365Provider entry.

Copy the Callback URL in the Salesforce Configuration section at the bottom of the view to your clipboard - we will use this in the next step.

Click on Edit and leave the tab open for now.

2.1.1 Microsoft Azure Application Registration

Note:

The following screenshots may differ in minor ways depending on whether you want to create an Enterprise Application or e.g. an Application (Preview).

From your Azure Portal navigate to Azure Active Directory and click on App registration.

On the next site we want to click on + New registration

[Home](#) > [MSFT | App registrations](#) >

Register an application ...

*** Name**

The user-facing display name for this application (this can be changed later).

Supported account types

Who can use this application or access this API?

- ☒ Accounts in this organizational directory only (MSFT only - Single tenant)
- ☐ Accounts in any organizational directory (Any Azure AD directory - Multitenant)
- ☐ Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)
- ☐ Personal Microsoft accounts only

[Help me choose...](#)

Redirect URI (optional)

We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.

First give your app a proper name you need (e.g. the domain name of your Salesforce Organization).

Select a supported account type that suits your requirements. In the **Redirect URI** field, paste the Callback URL from Salesforce which you copied to your clipboard in the last step.

Click on Register

First of we want to copy the Application (client) ID from the header of the app.

Display name : [data app](#)

Application (client) ID : 2c0e19fe-4ea0-4949-ae03-c3b4ac78fb00

Object ID : 8a05c0d0-ccf6-437f-8e5d-6331233f6def

Directory (tenant) ID : b0ad5c55-2243-4917-8531-bed616931260

Back in Salesforce in the edit view of the Auth. Provider paste the Application ID from your Azure App in the Consumer Key field

Auth. Provider

Auth. Provider Edit

Save Save & New Cancel

Auth. Provider ID 0S07S000000hPb

Provider Type Open ID Connect

Name Q365Provider

URL Suffix Q365Provider

Consumer Key 7d749b8b-0bda-4b62-8659

Switch back over to the Microsoft Azure Application tab one more time.

From the side menu go to **API permissions**

There should already be an entry for the **Microsoft Graph > User.Read**

Click on + **Add a permission** and select **Microsoft Graph > Delegated Permissions**.

For more information about Permissions and what they're used for, please refer to section [Graph API Permissions](#).

Note:

If you decide to come back at a later time, please take heed that you need to refresh your authentication in Salesforce every time you make changes to your Azure Application's set of Microsoft Graph API permissions. Setting up the authentication in Salesforce is described in section [Authentication via Named Credential](#).

On saving you'll be notified that in order to enable the new permissions you'll need to consent for your new settings:

You are editing permission(s) to your application, users will have to consent even if they've already done so previously.

Click on **Grant admin consent for QKom GmbH** and follow the on-screen instructions.

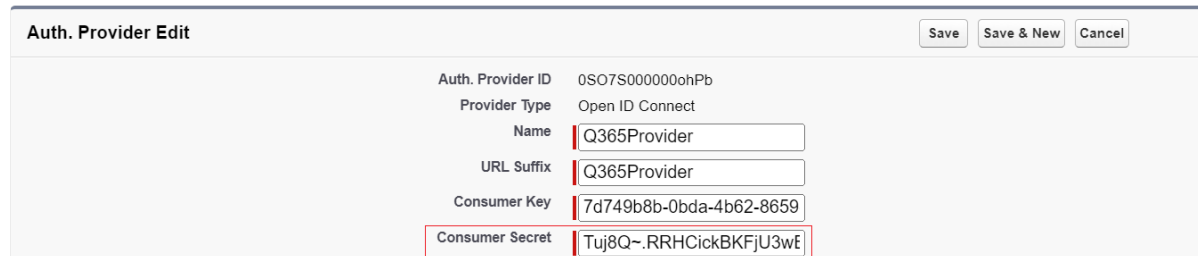
Now for our last step let's navigate to **Certificates & secrets**.

Click + **New client secret** and give it a proper name. Select an **expiration date** and click **Add**.

Copy the key we just created to your clipboard. You are free to close your Azure tab at this point.

Back in Salesforce paste the key from your clipboard to the Auth. Provider's **Consumer Secret** field.

Auth. Provider



Auth. Provider Edit		Save	Save & New	Cancel
Auth. Provider ID	0SO7S000000ohPb			
Provider Type	Open ID Connect			
Name	Q365Provider			
URL Suffix	Q365Provider			
Consumer Key	7d749b8b-0bda-4b62-8659			
Consumer Secret	Tuj8Q~.RRHCickBKFjU3wE			

Click **Save**.

The backend configuration is now finished.

2.1.2 Graph API Permissions

There's a lot of Permissions you can set in your Azure App configuration.

A full overview of all permissions can be found at <https://learn.microsoft.com/en-us/graph/permissions-reference>

Permission Name	Description	Required for
Basic functionality		
profile	Read basic profile	Basic authentication
Sharepoint Integration		
openid	Sign users in	Basic functionalities
Sites.Read.All	Access content in all site collections	Access Sites, Documents Libraries,
Sites.ReadWrite.All	Edit or delete items in all site collections	Upload to Sites, Document Libraries
Files.Read.All	Have read access to all files user can access	Access files
Files.ReadWrite.All	Have full access to all files user can access	Upload, Delete Files
Teams Integration		
People.Read	Read users relevant people lists	Homepage widgets, „my colleagues“ search option
User.Read.All	Read all users full profiles	Homepage widgets, „My colleagues“ search option
OnlineMeetings.ReadWrite	Read and create users online meetings	Meet in Teams feature

Note:

There's no definitive answer on which API Permissions you need to set up as it highly depends on your actual use case.

Note:

Whenever you make changes to the Permissions in your Azure App, you'll need to re-authenticate your Salesforce user as described in the section [Authentication via Named Credential](#).

2.2 Remote Site Settings

If you plan on using the **Upload** functionalities in Q!365, you'll need to set up one additional **Remote Site Setting** within your Salesforce Environment.

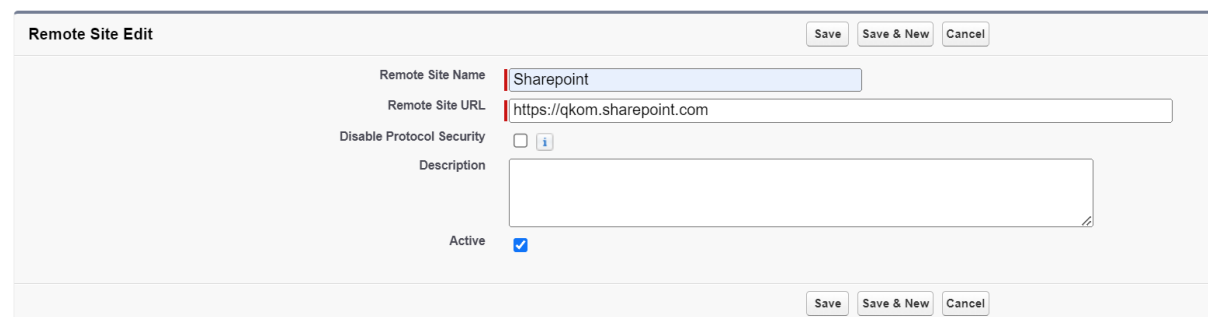
From the Salesforce Setup, navigate to **Remote Site Settings** and click **New**.

Give it a proper name such as „Sharepoint“. For the **URL** please enter your Microsoft 365 tenant's default Sharepoint URL.

As an example, we at Q!kom have the tenant domain „qkom.de“, our default Sharepoint URL is therefore „https://qkom.sharepoint.com“

Remote Site Edit

Enter the URL for the remote site. All s-controls, JavaScript OnClick commands in custom buttons, Apex, and AJAX proxy calls can access this Web address from salesforce.com.



Click **Save**.

You're now fully prepared for all features in Q!365.

2.3 Permission Set

From the Setup navigate to **Permission Sets**.

Q!365 comes with two Permission Sets, one of which you have to assign to your users.

☐ Clone	Q!365 Admin	Q!365 Administration Profile
☐ Clone	Q!365 End User	Default user permissions for Q!365

The **Q!365 End User** set is the important here. Every user that should have access to the app needs to be assigned to this Permission Set. This will grant access to the main application components as well as the Named Credential, which is critical as it covers the authentication for your users.

Click on the Q!365 End User entry. In the next screen click **Manage Assignments** and then **Add**. Select all users that need access to the application.

In addition, **Q!365 Admin** will give you access to a Custom Object Tab for all of the future metadata files. This way you can easily restore mistakenly deleted references for example.

2.4 Authentication via Named Credential

From your Personal Setup navigate to **Authentication Settings for External Systems**.

Click on **New**.

Select your user, Q!365 as **Named Credential** and make sure to check **Start Authentication Flow on Save**.

New Authentication Settings for an External System

Set up user authentication for third-party systems or other Salesforce orgs.

The screenshot shows a Salesforce configuration page for setting up authentication for an external system. The page has a light gray header with 'Save' and 'Cancel' buttons. Below the header is a blue bar with a dropdown arrow and the text 'Authentication'. The main form area contains several fields: 'External System Definition' is a dropdown menu set to 'Named Credential'; 'Named Credential' is a dropdown menu set to 'Q!365'; 'User' is a text input field containing 'Demo User' with a user icon to its right; 'Authentication Protocol' is a dropdown menu set to 'OAuth 2.0'; 'Authentication Provider' is a text input field containing 'Q365Provider'; 'Scope' is a text input field that is currently empty; 'Authentication Status' is a text input field containing 'Pending'; and 'Start Authentication Flow on Save' is a checkbox that is checked. At the bottom of the form, there are 'Save' and 'Cancel' buttons.

External System Definition	Named Credential
Named Credential	Q!365
User	Demo User
Authentication Protocol	OAuth 2.0
Authentication Provider	Q365Provider
Scope	
Authentication Status	Pending
Start Authentication Flow on Save	☒

On saving you'll be redirected to Microsoft in order to establish the OAuth 2.0 connection to Microsoft 365.

You are now authenticated.

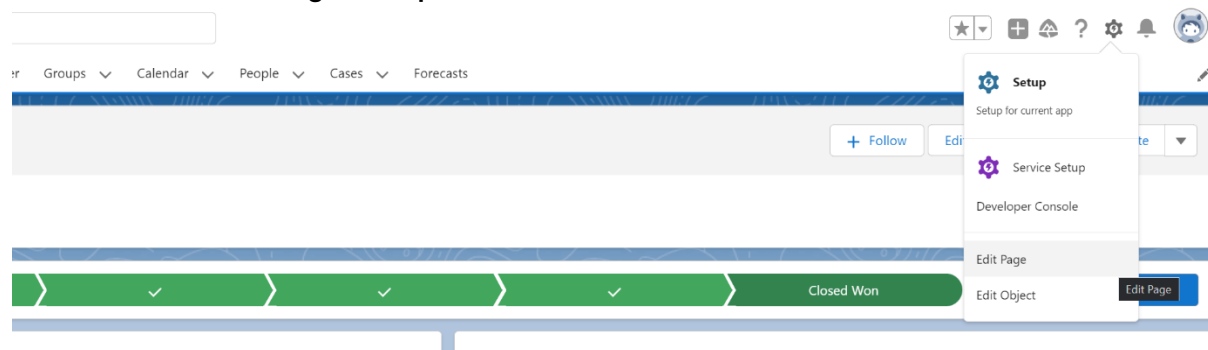
3 User Interface Configuration

3.1 Page Layouts

To make Q!365 accessible for everyone you'll need to add and configure the Lightning Component provided by the application in the designated Salesforce Standard and/or Custom Objects Pages.

One way to access the **Lightning App Builder** is by clicking the small gear in the top right corner and then on **Edit Page**.

In the **Lightning App Builder** you find the Q!365 Lightning Component you will use soon. It's on the left side in the **Custom-Managed Components** section and is called **Q!365 - Search and Link**.



✓ Custom - Managed (6)

Q! Q!365 - Mobile

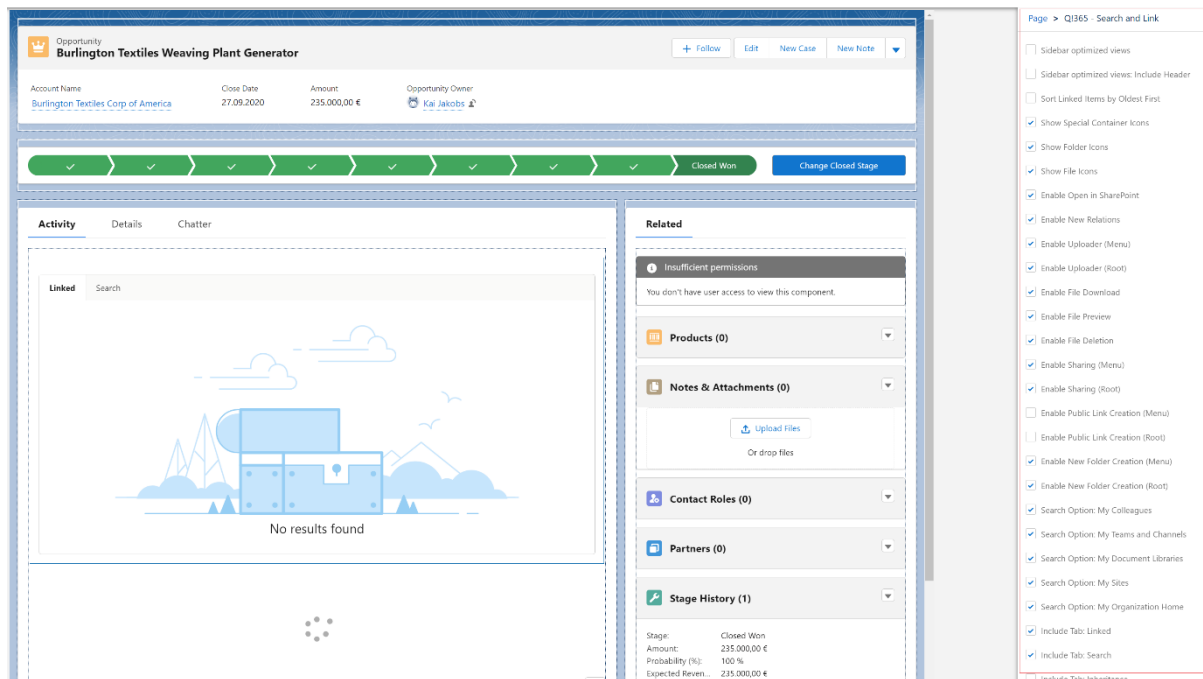
Q! Q!365 - Search and Link

If you want to use the full detailed version with the complete set of data columns, we recommend to create a new tab which'll serve as our component's container. There's also a more condensed version suitable for living in the sidebar which we'll defer to describing later in this section.

Click on an existing tab like **Related** or **Details**. You'll note the tab configuration popping up on the right side. Click on **Add new Tab** and change its type from e.g. **Details** to **Custom**. Give it a proper name like „Q!365“ and click on it.

Now Drag & Drop the Lightning Component into your new tab.

Note the options coming up to the right side of the Lightning App Builder:



You can configure Q!365 in many ways to get optimal results for your requirements, object pages and use cases.

The most basic decision to make is either to operate Q!365 in a dedicated tab on your Record Page or placing it in the right-handed sidebar to have your Microsoft 365 contents available at all times without doing a single click. We describe every option in detail in the next table.

Note:

„Run on Behalf of Service User“ and „Service Named Credential“ are playing a critical role when you plan to operate Q!365 in a Customer- or Partner-Community for example. Or in situations where your users don't have an Account on your Microsoft Tenant. Please refer to section [Community & Service Edition](#) to get a full understanding of what these options can do for you.

Options:

Name	Description
Sidebar optimized views	Condensed version of the main application. Comes with fewer columns to get an optimised view when living in a Record Page sidebar. Check this if you want to place Q!365 in the right-handed sidebar of your page.
Sidebar optimized views: Include Header	Adds a Related Lists like header to the application.
Sort Linked Items by Oldest First	In many cases your first link on the record is the most important one. Check this option to let this first relation stay on top of your tab's list of links
Show Special Container Icons	Enables icons for Sites, Libraries, Teams, Channels, Pro- files, etc
Show Folder Icons	Enables folder icons
Show File Icons	Enables file icons
Enable Open in SharePoint	Enables redirecting the user to the shown Sharepoint item
Enable New Relations	Enables the Option to create a new Relation out of one of the shown items
Enable Uploader (Menu)	Enables the Upload function in the drop down menu of a shown items
Enable Uploader (Root)	Enables the Upload function in the bottom of the component to the linked folder
Enable File Download	Enables the option to download show items to the users computer
Enable File Preview	Enables the option to preview a file in the browser
Enable File Deletion	Enables the option to delete a linked item
Enable Sharing (Menu)	Enables the option in the drop down menu of an item to share the item via email
Enable Sharing (Root)	Enables the option in the bottom of the component to share the linked item via email
Enable Public Link Creation (Menu)	Enables the option in the drop down menu to create a link to the item which can be publicly available
Enable Public Link Creation (Root)	Enables the option in the bottom of the component to create a link to the linked item which can be publicly available
Enable New Folder Creation (Menu)	Enables the option in the drop down menu to create a new folder. This only works if the item of the drop down is a folder
Enable New Folder Creation (Root)	Enables the option in the bottom of the component to create a new folder within the linked folder
Search Option: My Colleagues	Includes the ability to search your Microsoft organization user in the Search tab
Search Option: My Teams and Channels	Includes the ability to search your joined Teams and Channels in the Search tab

Search Option: My Documents Libraries	Includes the ability to search and link Document Libraries in the Search tab
Search Option: My Sites	Includes the ability to search directly within a Sharepoint Site in the Search tab
Search Option: My Organization Home	Adds a shortcut option to your Organization's default Sharepoint Site in the Search tab
Include Tab: Linked	Enables/Disables the Linked Tab
Include Tab: Search	Enables/Disables the Search Tab
Include Tab: Inheritance	Enables/Disables the Inheritance Tab
Include Tab: Folders	Enables/Disables the Folders Tab
Include Tab: Sites	Enables/Disables the Sites Tab
Include Tab: Document Libraries	Enables/Disables the Document Libraries Tab
Include Tab: Channels	Enables/Disables the Teams Channels Tab
Start on Tab:	Select on which tab you'd like to start on when loading the page
Name	Description
Run on Behalf of Service User	Enables service user capabilities such as Upload, Fetch data and more. Please consult section Community & Service Edition to get a full detailed description.
Service Named Credential Name	Name of the service user's Named Credential needed to operate on behalf of. Please consult section Community & Service Edition to get a full detailed description.

Note:

If this is the first edit of a Page Layout of this specific Object you'll be prompted to activate the changes. Just follow the on screen instructions and you'll be good to go.

3.2 Community & Service Edition

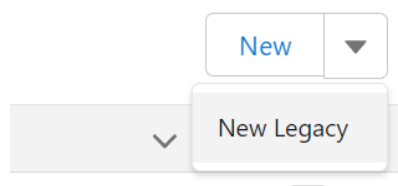
Q!365 can also be operated on behalf of a dedicated service/technical user.

This is especially useful in situations where you want to include Q!365 in a Community, but you don't want to or can provide Microsoft 365 (Guest) accounts for all your clients or partners.

3.2.1 Named Principal Credentials

At the very first we need to create a new Named Credential.

From the Salesforce Setup, navigate to **Named Credentials** and open the drop down menu next to **New** and click on the option **Legacy**.



Give it a suitable **Label** that fits your use case, i.e. „Q365Service“.

The **Name** field will automatically be populated when you click in it. Its value is very important as we need it in a later step to configure Q!365. You may want to copy it to your clipboard now.

In the **URL field**, enter:

<https://graph.microsoft.com>

Leave the **Certificate** field empty and select **Named Principal** for the **Identity Type**.

Select **OAuth2.0** from the list of **Authentication Protocols** in case it's not selected by default.

In the **Authentication Provider** field, click on the small magnifying glass icon and select the **Q365Provider** in the pop-up window.

Leave the scope field empty but make sure to check **Start Authentication Flow on Save**, as it will redirect you to Microsoft 365 to initiate the authentication process.

Before we proceed with that, make sure that **Generate Authorization Header** in the Callout Options section is checked as well. Leave the rest of the fields in that section unchecked or empty.

SETUP

Named Credentials

Named Credential Edit: Q365Service

Specify the callout endpoint's URL and the authentication settings that are required for Salesforce to make callouts to the remote system.

Save

Cancel

Label ⓘ

Q365Service

Name ⓘ

Q365Service

URL

https://graph.microsoft.com/

▼ Authentication

Certificate

Identity Type

Named Principal ▼

Authentication Protocol

OAuth 2.0 ▼

Authentication Provider

Q365Provider

Scope

Authentication Status

Authenticated

Start Authentication Flow on Save

☒

▼ Callout Options

Generate Authorization Header ⓘ

☒

Allow Merge Fields in HTTP Header ⓘ

☐

Allow Merge Fields in HTTP Body ⓘ

☐

Outbound Network Connection ⓘ

Save

Cancel

Click **Save**.

You'll now get redirected to Microsoft 365 to complete the authentication process.

3.2.2 Component Configuration

Now that we have our service authentication ready, we can move over to the component configuration.

We'll use a Digital Experience configuration as example, but you can adopt this to every Standard- and Custom Object across your entire Salesforce ecosystem. No matter if its taken place in a Digital Experience, Service- or Knowledge environment or your default internal Salesforce organization.

On the component that you want to enable to operate Q!365 on behalf of a service user, go into Lightning App Builder (depending on where you want to include it, there's different ways to do that.)

In this example we're in the **Experience Builder**.

In the **Generic > Record Details Page**, we'll find the Q!365 component in the Components submenu in the Custom Components section

▼ Custom Components (1)

 Some components in this section are blocked due to the site's security level setting. [More Details](#)

 Q!365 - Search and Link

Drag & Drop the component onto the Record Page Layout.

As earlier in this chapter you'll notice a section of configuration properties showing up on the right-handed side of the screen.

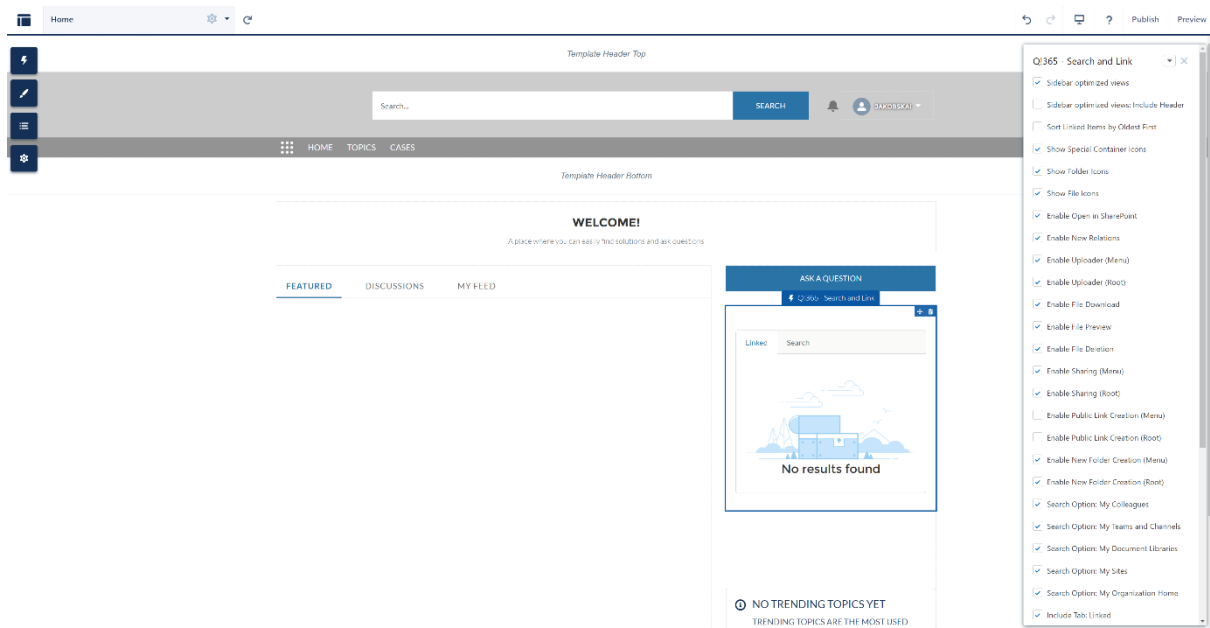
These are identical to the properties as described in detail earlier.

The two important properties that we'll use in order to operate Q!365 on behalf of our service configuration are **Run on behalf of Service User** as well as **Service Named Credential Name**.

Run on behalf of Service User checks if the current user is assigned to a Partner/Customer or Community License/Profile.

Service Named Credential Name gets the name of our Named Principal Credential that we created in the last step.

Set the additional configuration properties according to your specific use case. For example, operating on behalf of the service user would allow your users to upload documents or even delete files in linked containers so you might want to think about what features you want to enable in this scenario.



We describe a detailed scenario later in this document.

3.2.3 Authenticate Shared Resource Action

In order let your external users access a shared resource in Microsoft 365, they need to initiate an authentication process in your Microsoft 365 environment. This requires the resources to be shared with the users email address in the first place.

Quick Action From the Salesforce Setup's Object Manager, navigate to your designated Object, i.e. Contact.

Select **Buttons, Links, and Actions** from the left-handed navigation panel.

Click **New Action** in the top-right corner of the view.

Switch the Action Type from **Create a New Record** to **Lightning Component** and select **qkom365:AuthSharedResource** from the picklist of available Lightning Components.

Leave the **Height** value at **250px** and set a fitting **Label**, such as **Authenticate Shared Resource**.

Account Actions
New Action

The screenshot shows the 'Enter Action Information' dialog box in Salesforce. The fields are as follows:

- Object Name: Account
- Action Type: Lightning Component
- Lightning Component: qkom365:AuthSharedResource
- Height: 250px
- Standard Label Type: --None--
- Label: Authenticate Shared Resou
- Name: Authenticate_Shared_Reso
- Description: (empty)
- Icon: Change Icon

Save and Cancel buttons are located at the top right and bottom right of the dialog.

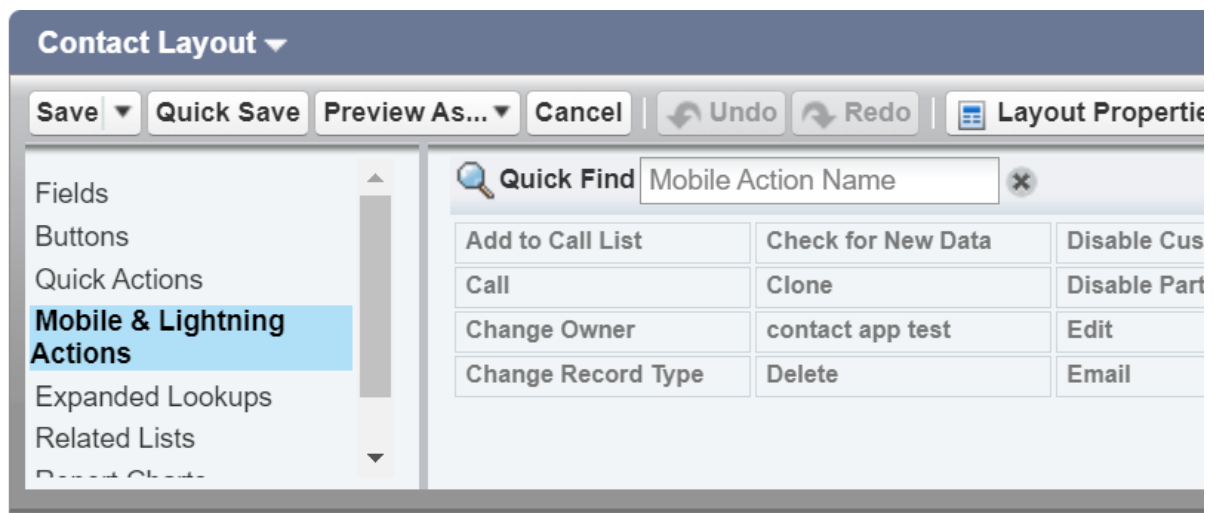
Click **Save**.

Still in the Object Manager for your designated object type, head over to **Page Layouts**.

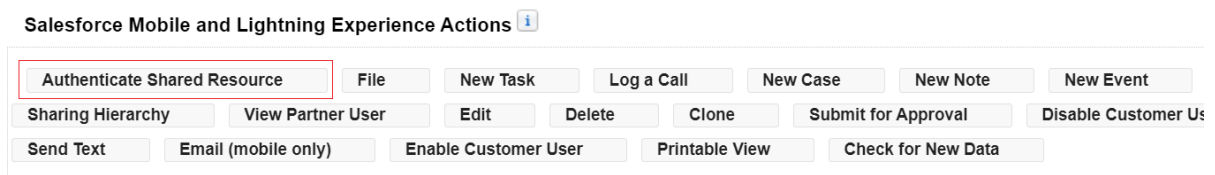
Click on the entry that you want to place the action on. In our example, and without any customisation, it's the default **Contact Layout** entry.

In case this is your first edit on the Page Layout that involves Lightning Action, click on **override the predefined actions** within the **Salesforce Mobile and Lightning Experience Actions** panel.

To place the Action we just created onto the Page Layout, switch to **Mobile & Lightning Actions** in the top panel.



You can now Drag & Drop the **Authenticate Shared Resource** action from the list of available actions onto the **Salesforce Mobile and Lightning Experience Actions** section on the screen.



Click **Save** and you're good to go.

3.2.4 Example: Digital Experience Use Case

Use Case: Let clients and partners in an External Digital Experience participate in specific container folders

without providing a dedicated Microsoft user account in Microsoft 365.

Prerequisites: When a new Digital Experience User gets created in Salesforce, we automatically create a

specific folder structure in a given Document Library in Sharepoint. We want the top-level folder to be

shared with the Digital Experience user's external email address.

Create Community User: Dominic Ley (dl@company.com)

Sharepoint Folder Structure: Dominic Ley – Shared Folders

- Information
- Statements

Sharing gets initiated: dl@company.com

Q!365 Component configuration on Contact Record Page: Show all icons

- ❖ Include Tab: Folders
- ❖ Start on Tab: Folders
- ❖ Run on behalf of a service user

Service Named Credential Name: **Q365Service**

This will allow your users to participate in their dedicated space, which is the personal folder structure created for that purpose.

In order to access the contents in Sharepoint Online, the users will need to use the **Authenticate Shared Resource** Quick Action (as described earlier) to create a one-time-pad token in Microsoft 365.

On the user's personal contact record within the Community, the User Experience should now look like this:

Title

Account Name

Phone (2) ▼

Email
dl@company.com

Contact Owner
User1684938516376964022

Folders

Dominic Ley - Shared Documents

Search

Name	Owner	Last Edited	Type	Size	
Correspondence	Kai Jakobs	24. Mai 2023 um 1...	Folder	0 Bytes	▼
Information	Kai Jakobs	24. Mai 2023 um 1...	Folder	0 Bytes	▼

2 Results

4 Inheritance

Q!365 supports custom configuration for inherited relations.

This will support you in linking key contents such as Product Owner or Specialists on a Salesforce Product only once. Then, every time this Product gets referenced in an Opportunity for example, the Product relations are right on the spot where you need them and whenever you need them.

Products on Opportunities as well as Contracts and Accounts are very common examples which you'll find in detail in the upcoming sections.

You are free to configure every relationship your Salesforce environment has to offer, including your own Custom- and Junction Objects

4.1 Configuration

From the Setup go to **Custom Metadata Types**. Click **Manage Records** on the Q!365 Inherited Relations entry.

On the next page click on **New** to start adding a new configuration.

First we need to declare a label for our inheritance configuration. Pick a name that suites the configuration (i.e. Products on Opportunities).

Parent Object: From the dropdown list pick your object on which the inherited relation will be displayed.

Child Object: Here we need to pick the object which relations should be inherited to our parent.

Note:

If you want to configure a relation which includes a Junction object (i.e. Products on Opportunities), we need to pick the Junction object here.

Lookup Field: Pick the Lookup field which serves as relationship to our parent object.

Optional Lookup: This is only required for inheritance fetched through a Junction object.

4.1.1 Example: Products on Opportunities

Q!365 Inherited Relations

[Help for this Page](#)

Q!365 Inherited Relations Edit

Save

Save & New

Cancel

Information

Label

Products on Opportunities

Q!365 Inherited Relations Name

Products_on_Opportunities

Protected Component

☐

Lookup Relation

Parent Object

Opportunity

Child Object

Opportunity Product

Lookup Field

Opportunity ID

Junction Objects

Optional Lookup

Product ID

Save

Save & New

Cancel

Note:

This shows the configuration for relations coming through a Junction object, which in this case is the Opportunity Product (e.g. Opportunity Line Item). The actual inheritance will then be fetched from the Product ID field.

4.1.2 Example: Contracts on Accounts

Q!365 Inherited Relations

[Help for this Page](#)

Q!365 Inherited Relations Edit

Save

Save & New

Cancel

Information

Label

Contracts on Accounts

Q!365 Inherited Relations Name

Contracts_on_Accounts

Protected Component

☐

Lookup Relation

Parent Object

Account

Child Object

Contract

Lookup Field

Account ID

Junction Objects

Optional Lookup

--None--

Save

Save & New

Cancel

Note:

On simple 1-1 relationships there is no need for any further Optional Lookup fields.

5 Special features: Quick Actions

In addition to the main application's focus features, Q!365 offers a lot more side capabilities such as Teams Meetings integration, which we'll describe in the upcoming sections.

Those are integrated as Custom Lightning Components available for Quick Actions. You are free to configure them onto any Salesforce Standard as well as your Custom Object Record Pages.

5.1 Microsoft Teams Meetings

Q!365 lets you create AdHoc Microsoft Teams Meetings. You can initiate meetings in either your personal user's context or, if you have pre-linked channels on your Salesforce record, in the context of those channels.

When the meeting is created you either notify yourself via email and forward this mail to anyone who you want to participate in the meeting, copy the meeting link to your clipboard, or jump right into the call.

In addition, if you place the meetings integration onto the Salesforce **Event** object, you can place the meeting information in your scheduled event's description field.

Note:

There's a lot of automation possibilities you could achieve with integrating meetings in the Event object. Check our GitHub repository for examples, such as automatic meeting creation when a custom checkbox is set in your event.

5.1.1 Configuration

From the Salesforce Setup's Object Manager, navigate to your designated Object, i.e. Event.

Select **Buttons, Links, and Actions** from the left-handed navigation panel.

Click **New Action** in the top-right corner of the view.

Switch the Action Type from **Create a New Record** to **Lightning Component** and select **qkom365:Q365MeetNow** from the pick list of available Lightning Components.

Set the **Height** value to around **320px** and set a fitting **Label**, such as **Meet in Teams**.

Edit Event Action

Meet in Teams

Enter Action Information [Save] [Cancel]

Object Name: Event ⓘ

Action Type: Lightning Component

Lightning Component: qkom365:Q365MeetNow ⓘ

Height: 320px ⓘ

Standard Label Type: --None-- ⓘ

Label: Meet in Teams

Name: Meet_in_Teams ⓘ

Description: ⓘ

Icon: ⚡ Change Icon

[Save] [Cancel]

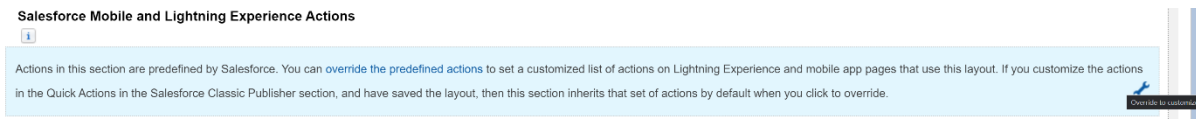
Click **Save**.

5.1.2 Page Layout

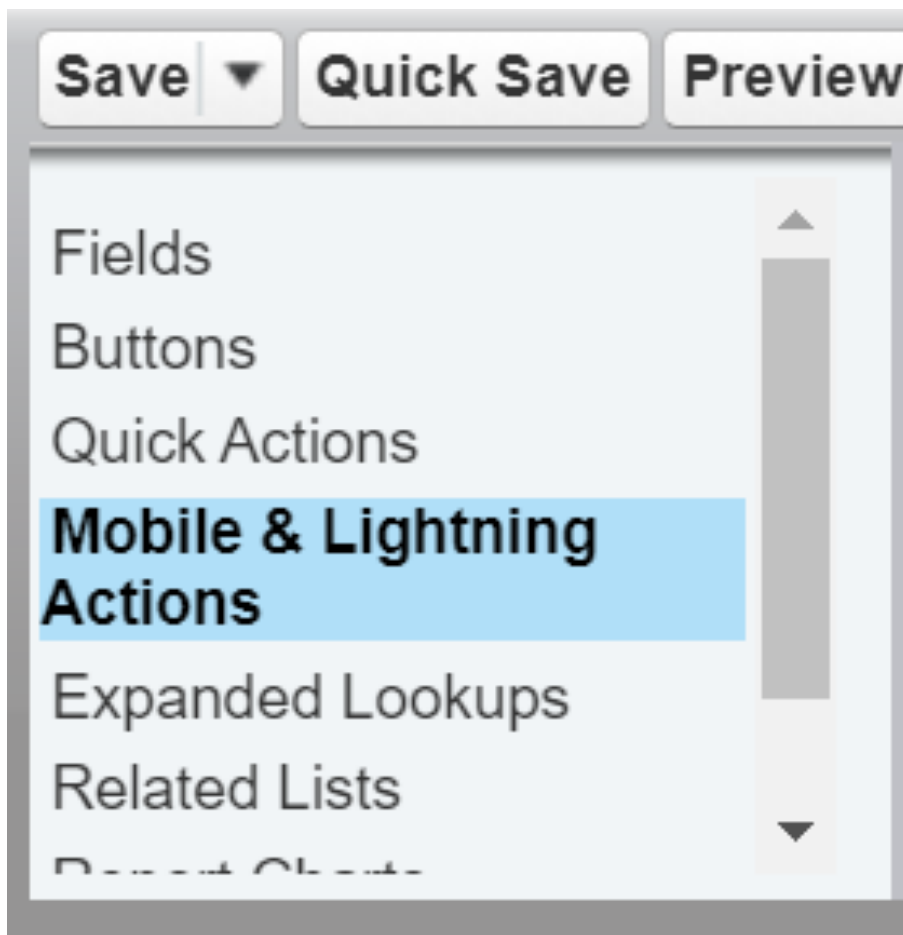
Still in the Object Manager for your designated object type, head over to **Page Layouts**.

Click on the entry that you want to place the action on. In our example, and without any customization, it's the default **Event Layout** entry.

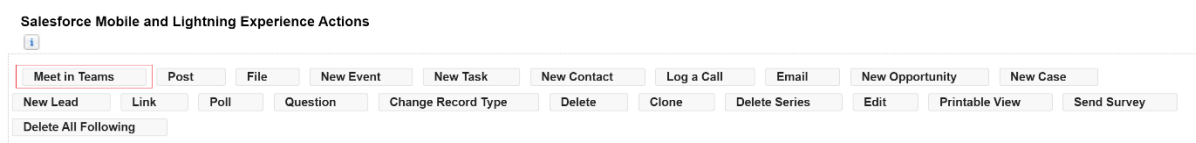
In case this is your first edit on the Page Layout that involves Lightning Action, click on **override the predefined actions** within **the Salesforce Mobile and Lightning Experience Actions** panel.



To place the Action we just created onto the Page Layout, switch to **Mobile & Lightning Actions** in the top panel.



You can now Drag & Drop the **Meet in Teams** action from the list of available actions onto the **Salesforce Mobile and Lightning Experience Actions** section on the screen.



Click **Save** and you're good to go.

5.2 Salesforce Teams Integration

With the brand new Salesforce Teams Integration, you're allowed to add dedicated Salesforce Record tabs into your Microsoft Teams Channels.

Q!365 integrates this in a one click solution. Add your records to linked Channels without leaving Salesforce. This supports all Object Records with Compact Layout Support.

Note:

To use this functionality, you're required to have the Salesforce Teams Integration enabled and configured in your Salesforce Organisation, and you need to have the Salesforce App available in your Microsoft Teams environment. You can retrieve the application at Microsoft AppSource.

5.2.1 Configuration

From the Salesforce Setup's Object Manager, navigate to your designated Object, i.e. Event.

Select **Buttons, Links, and Actions** from the left-handed navigation panel.

Click **New Action** in the top-right corner of the view.

Switch the Action Type from **Create a New Record** to **Lightning Component** and select **qkom365:AddTeamsTab** from the pick list of available Lightning Components.

Set the **Height** value to around **320px** and set a fitting **Label**, such as **Add to Teams**.

Edit Event Action

Add to Teams

Enter Action Information		Save	Cancel
Object Name	Event		
Action Type	Lightning Component		
Lightning Component	qkom365:AddTeamsTab		
Height	320px		
Standard Label Type	--None--		
Label	Add to Teams		
Name	Add_to_Teams		
Description			
Icon	Change Icon		
		Save	Cancel

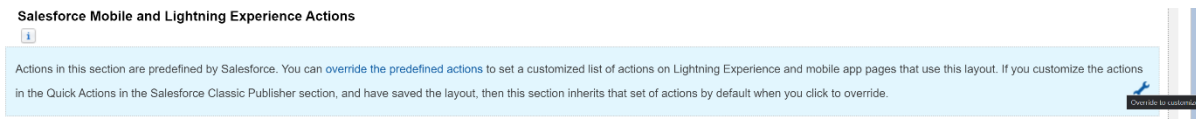
Click **Save**.

5.2.2 Page Layout

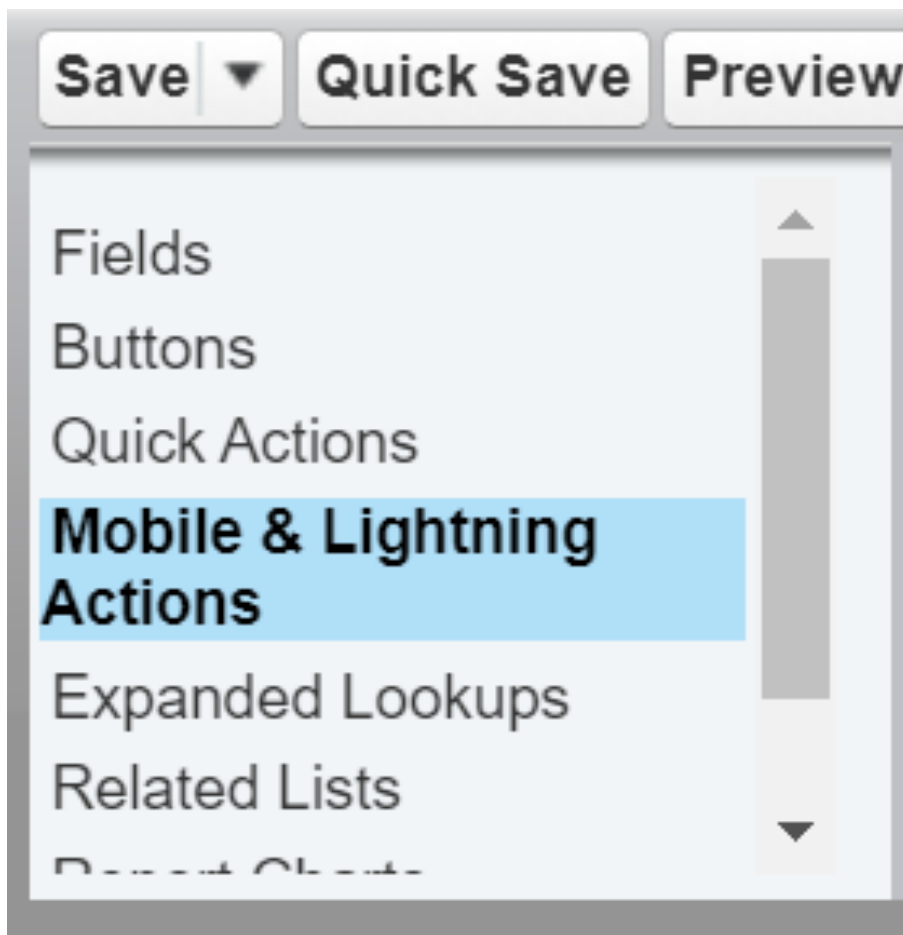
Still in the Object Manager for your designated object type, head over to **Page Layouts**.

Click on the entry that you want to place the action on. In our example, and without any customisation, it's the default **Event Layout** entry.

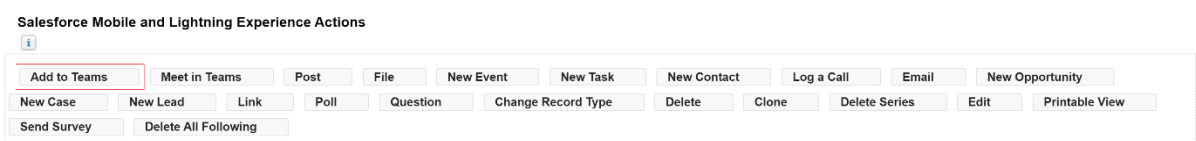
In case this is your first edit on the Page Layout that involves Lightning Action, click on **override the prede- fined actions** within **the Salesforce Mobile and Lightning Experience Actions** panel.



To place the Action we just created onto the Page Layout, switch to **Mobile & Lightning Actions** in the top panel.



You can now Drag & Drop the **Add to Teams** action from the list of available actions onto the **Salesforce Mobile and Lightning Experience Actions** section on the screen.



Click **Save** and you're good to go.

5.3 Link External Content

Q!365 lets you link any web resource to your Salesforce records as external relations.

5.3.1 Configuration

From the Salesforce Setup's Object Manager, navigate to your designated Object, i.e. Event.

Select **Buttons, Links, and Actions** from the left-handed navigation panel.

Click **New Action** in the top-right corner of the view.

Switch the Action Type from **Create a New Record** to **Lightning Component** and select **qkom365:ExternalContentLinkInvoke** from the pick list of available Lightning Components.

Set the **Height** value to around **320px** and set a fitting **Label**, such as **Link External Resource**.

Edit Event Action

Link External Resource

The screenshot shows the 'Enter Action Information' dialog box in Salesforce. The dialog is titled 'Enter Action Information' and has 'Save' and 'Cancel' buttons at the top right. The fields are as follows:

- Object Name: Event
- Action Type: Lightning Component
- Lightning Component: qkom365:ExternalContentLinkInvoke
- Height: 320px
- Standard Label Type: --None--
- Label: Link External Resource
- Name: Link_External_Resource
- Description: (empty)
- Icon: ⚡ Change Icon

At the bottom right, there are 'Save' and 'Cancel' buttons.

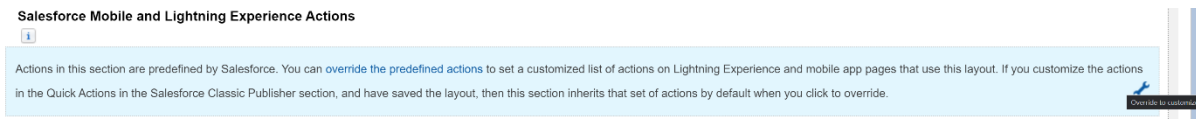
Click **Save**.

5.3.2 Page Layout

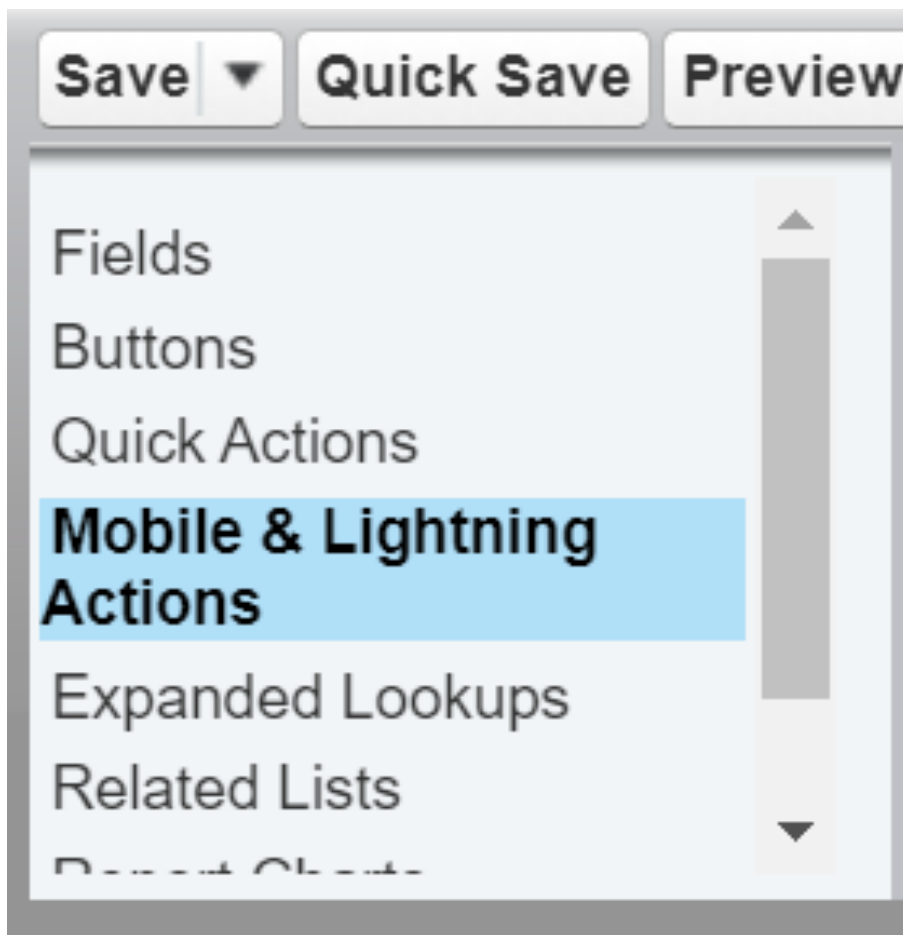
Still in the Object Manager for your designated object type, head over to **Page Layouts**.

Click on the entry that you want to place the action on. In our example, and without any customisation, it's the default **Event Layout** entry.

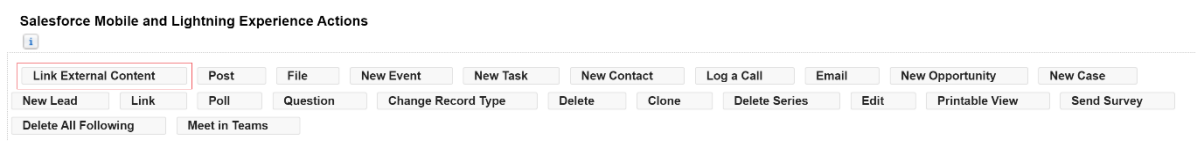
In case this is your first edit on the Page Layout that involves Lightning Action, click on **override the prede- fined actions** within **the Salesforce Mobile and Lightning Experience Actions** panel.



To place the Action we just created onto the Page Layout, switch to **Mobile & Lightning Actions** in the top panel.



You can now Drag & Drop the **Link External Resource** action from the list of available actions onto the **Salesforce Mobile and Lightning Experience Actions** section on the screen.



Click **Save** and you're good to go.

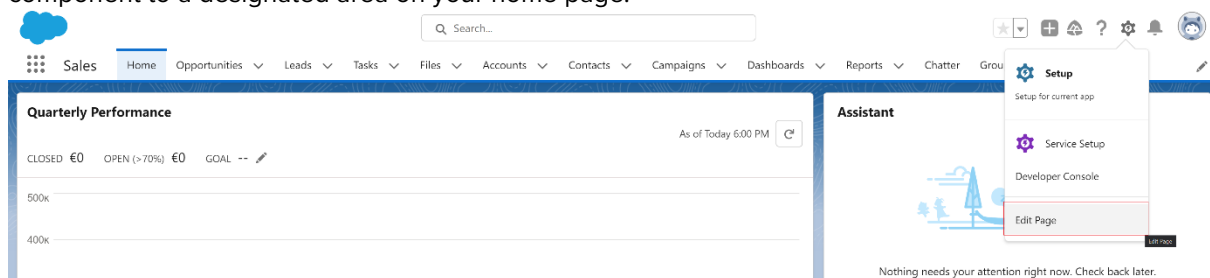
6 Home Widgets

Q!365 provides Homepage Widgets designed for quick access of different personal contents from your Microsoft 365 ecosystem.

6.1 Configuration

Navigate to your Home Tab in Salesforce. You want to access the Lightning App builder is by clicking the small Gear in the top right corner and then hit „Edit Page“.

In the Lightning App Builder you find the Q!365 Lightning Component we want to use. It's on the left side at the Custom - Managed Components and is called Q!365 Home Widgets. Just Drag&Drop the component to a designated area on your home page.



✓ Custom - Managed (5)

 Q!365 Home Widgets

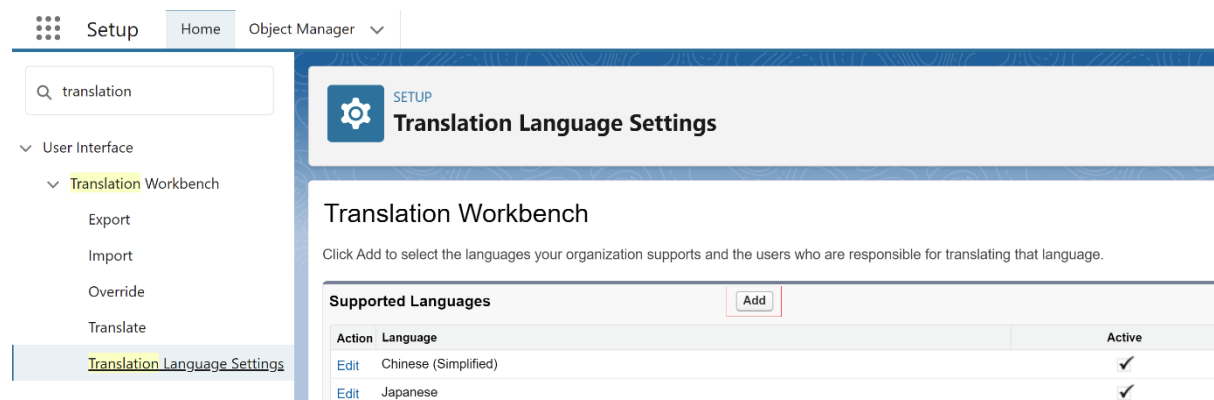
7 Translations

By default Q!365 comes with English, German, Dutch, French, Italian, and Spanish translations. However, you're free to add a new translation or override existing ones to your extends.

7.1 Adding new translations

From the Salesforce Setup navigate to **Translation Workbench > Translation Language Settings**

Click **Add** in the Supported Languages section.



Select the new Language you want to add and assign a Translator and click **Save**.

You are now done in the Translation Settings section.

Still from the Salesforce Setup, navigate to **User Interface > Custom Labels**.

Pick a label from Q!365 by clicking on its name. In the next screen click on **New Local Translations / Overrides**.

In here you can easily add the new Label Translation by selecting the newly added language.

Click **Save** and you've successfully added the new Label Translation.

Note:

You may also override existing translations in case there's a naming scheme more fitting to your company. For further information please reference the Salesforce documentation on translations:

[Add Translated Languages and Translators](#)

[Translate Custom Labels](#)

8 Known Issues

Error	Reason	Solution
Insufficient Privileges Illustration in the Q!365 component	Missing Q!365 End User Permission Set	Assign the user to the Q!365 End User Permission Set.
This Request is forbidden	Insufficient Azure Application rights	Add required Graph API rights. Re-authenticate Named Credential in Salesforce. Consult section Microsoft Azure Application / Enterprise Application for Azure Configuration, and section Authentication via Named Credential for re-authenticating with your Named Credential
Uploader Interface freezes and/or temporary data gets created in Sharepoint/Teams	Remote Site Setting for your Sharepoint most likely not added	Add a new Remote Site Setting for your Organization's Sharepoint (e.g. https://qkom.sharepoint.com).
Invalid resource when using My Colleagues search endpoint	Microsoft User is missing permissions/licenses	Check with your Microsoft Admin that your user has an active Exchange Mailbox license and visited it at least once.