

Admin Guide

Outlook Calendar Connector

06-12-2023

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Authorization

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Change History

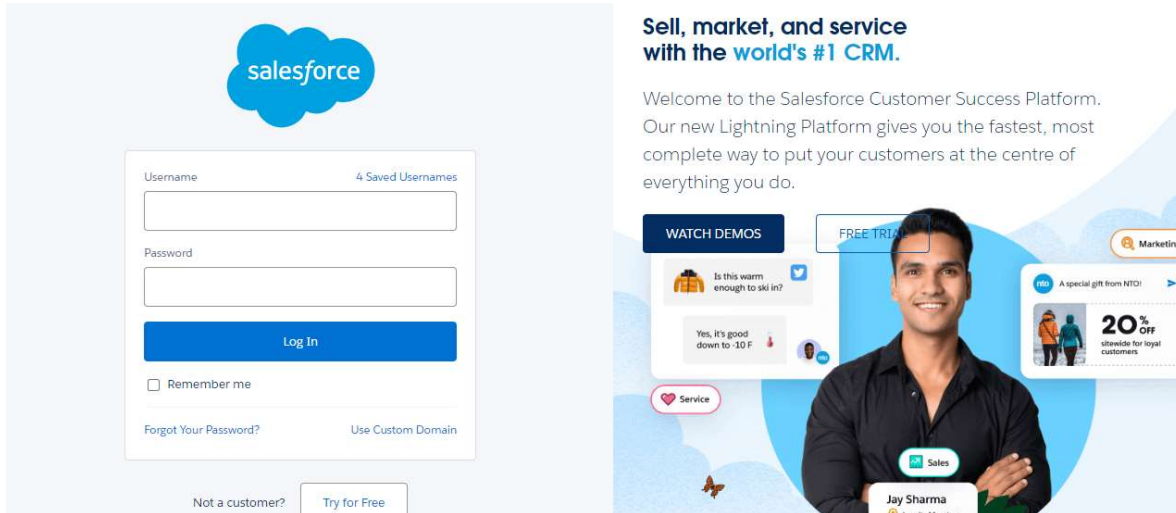
Version	Section	Changed By	Date	Change Information

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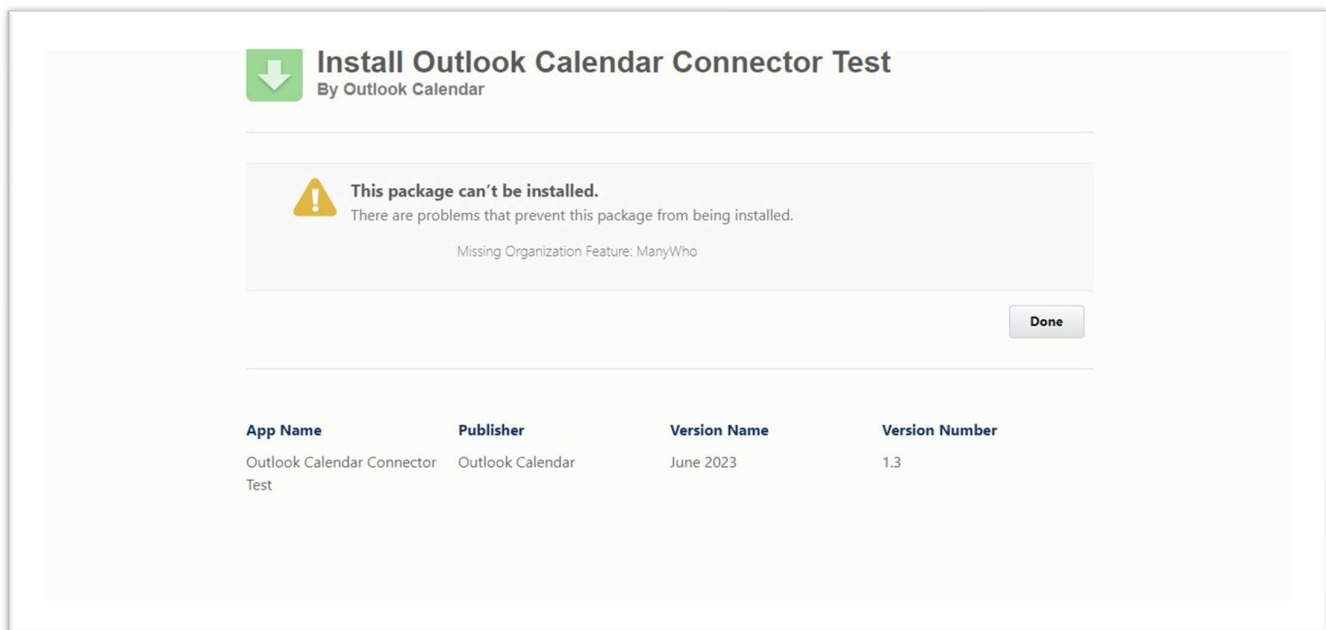
1. Process

1.2 Login to your Salesforce account



Important Note: Install the Package

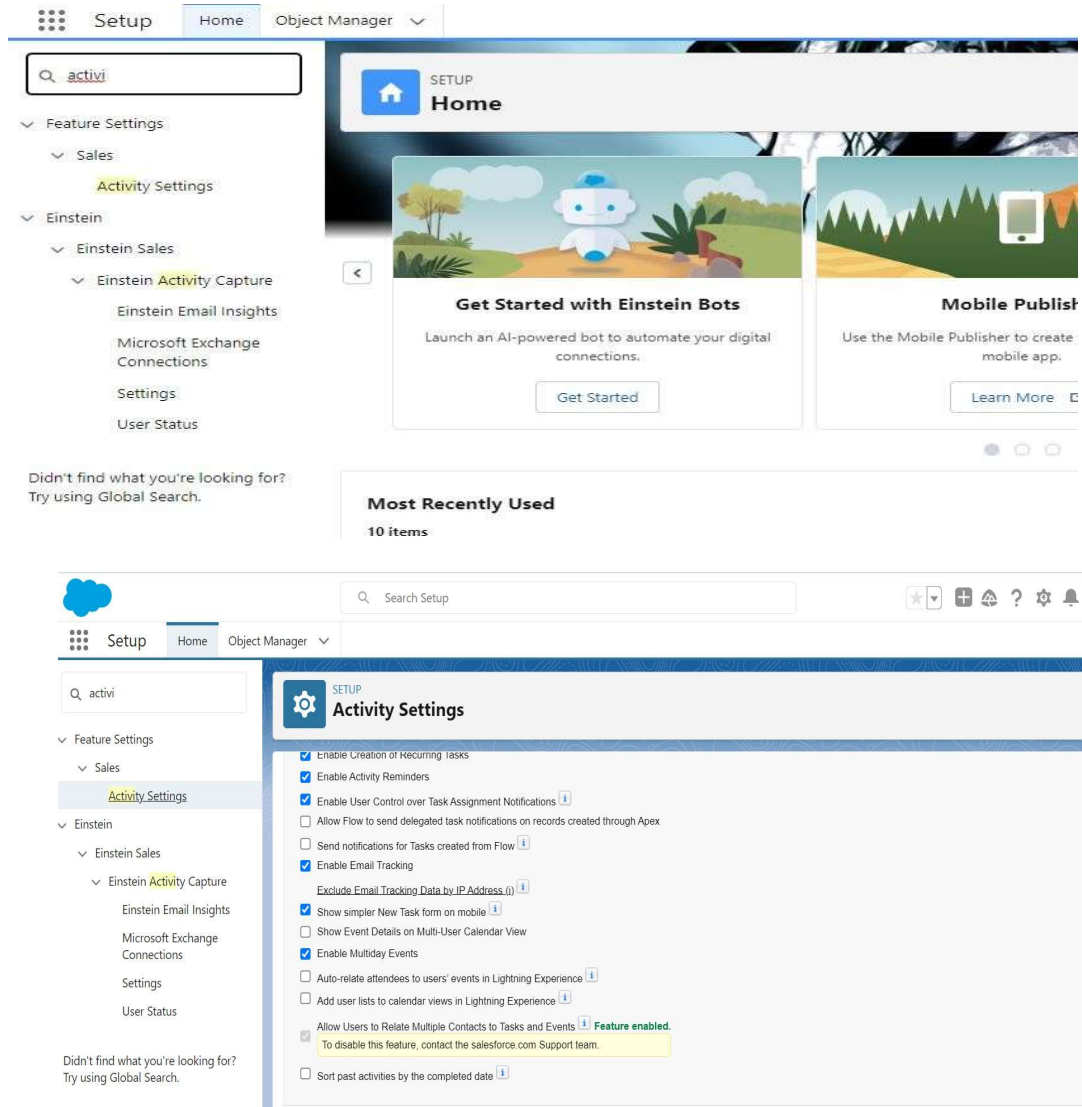
When user installs the package, it will throw error messages as:



1.3 Set up the Prerequisites for the org

Activity Settings in Setup

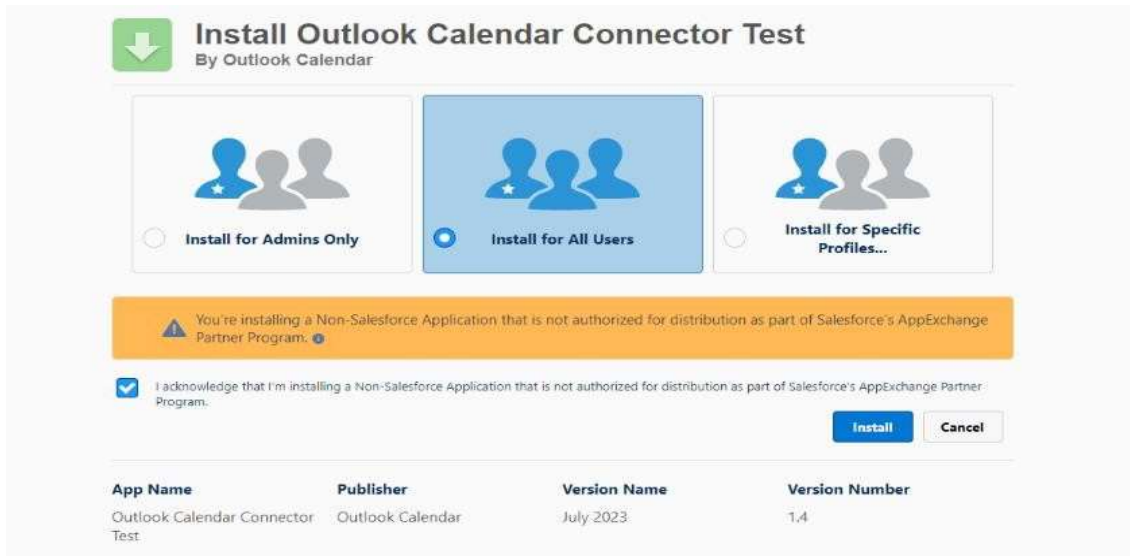
To install package successfully, Go to Activity settings in setup.



Check **“Allow Users to Relate Multiple Contacts to Tasks and Events”** checkbox in Activity **settings** before installing package.

- Click Submit after enabling it.
- Navigate to Package installation.
- Select Install for all users.

- Click Install



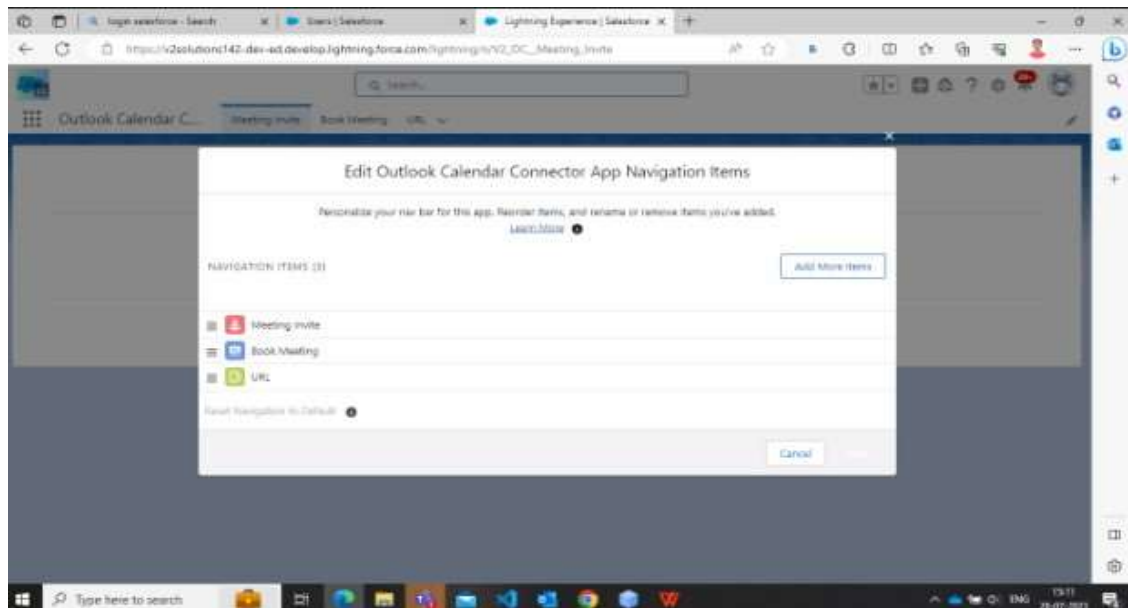
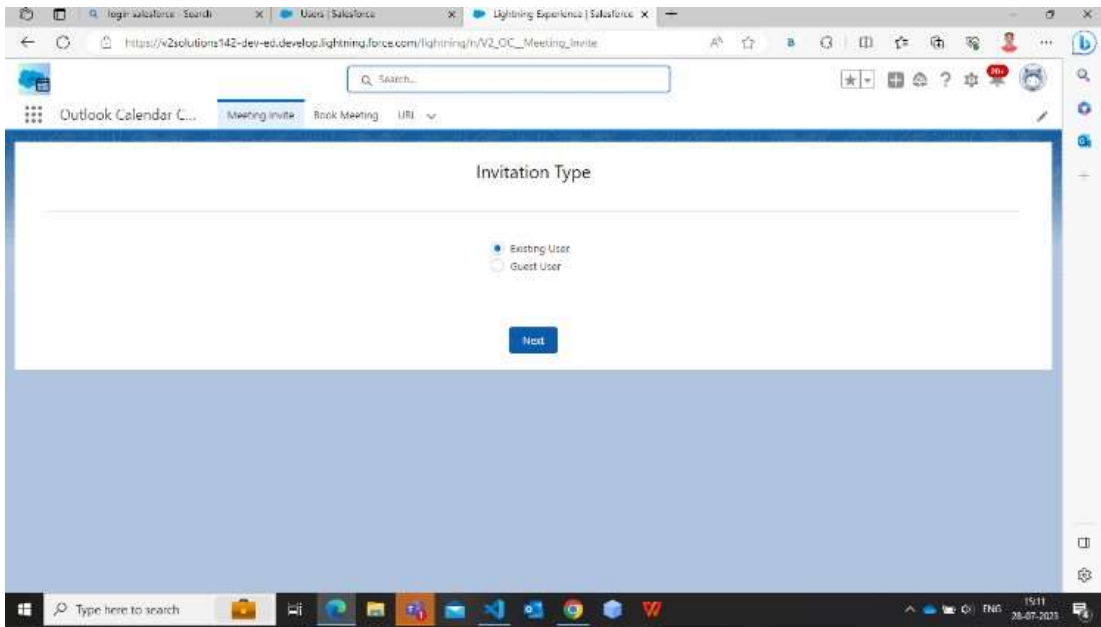
App Name	Publisher	Version Name	Version Number
Outlook Calendar Connector Test	Outlook Calendar	July 2023	1.4

Once Installed,

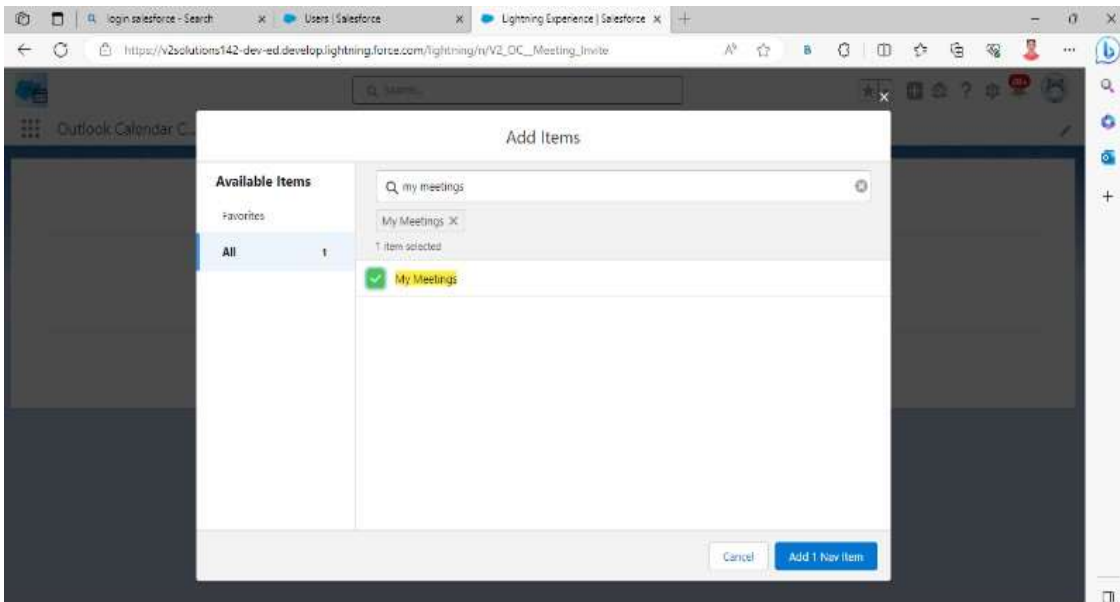
- Go to the App launcher.
- Search "Outlook Calendar"

Adding my meeting tab to the application.

Click on the Pencil mark icon on the right side of the Tabs.



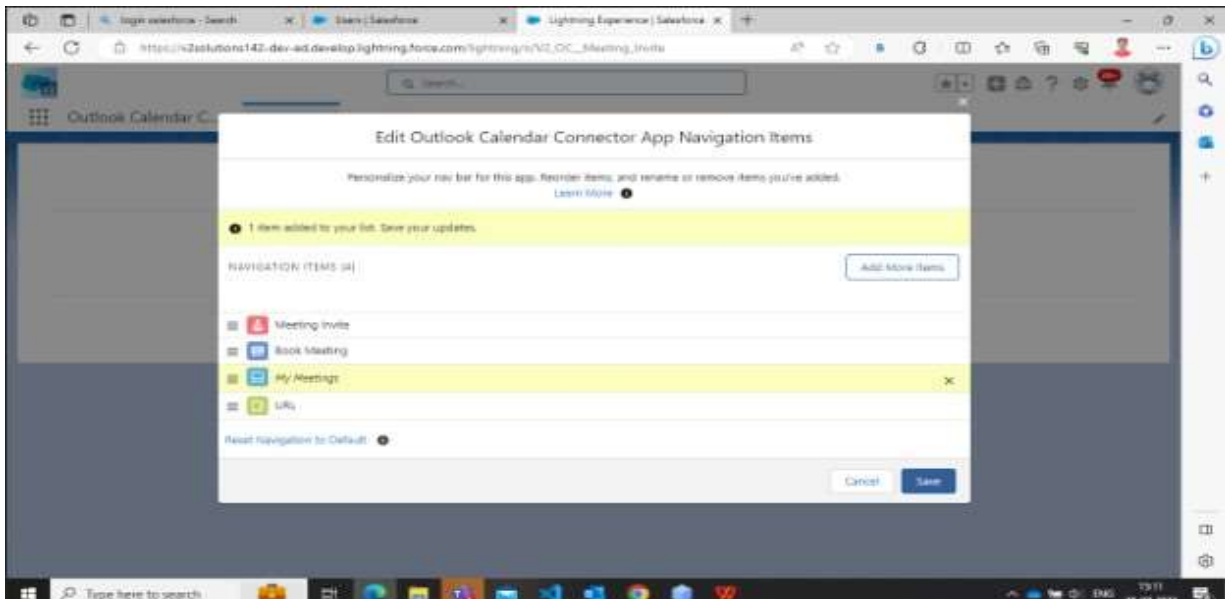
Click On Add more items on the top right.



Click on All in available items.

Search for "My meetings".

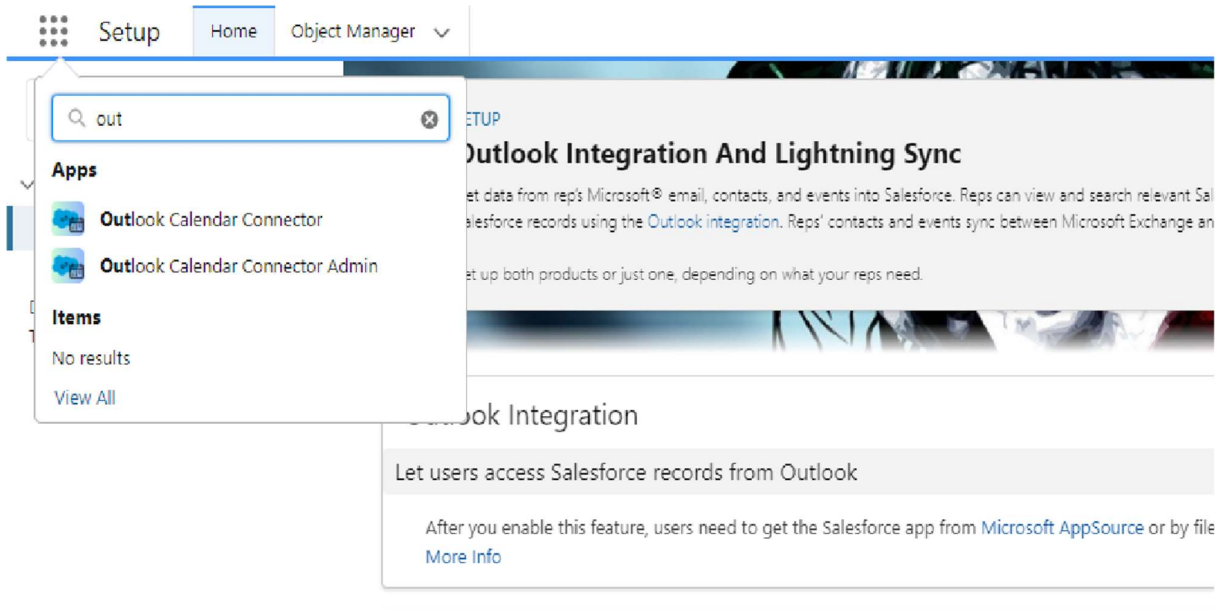
Select the tab and add to navigation items.



- Click on **Save**.

1.3.2 Outlook Calendar Admin

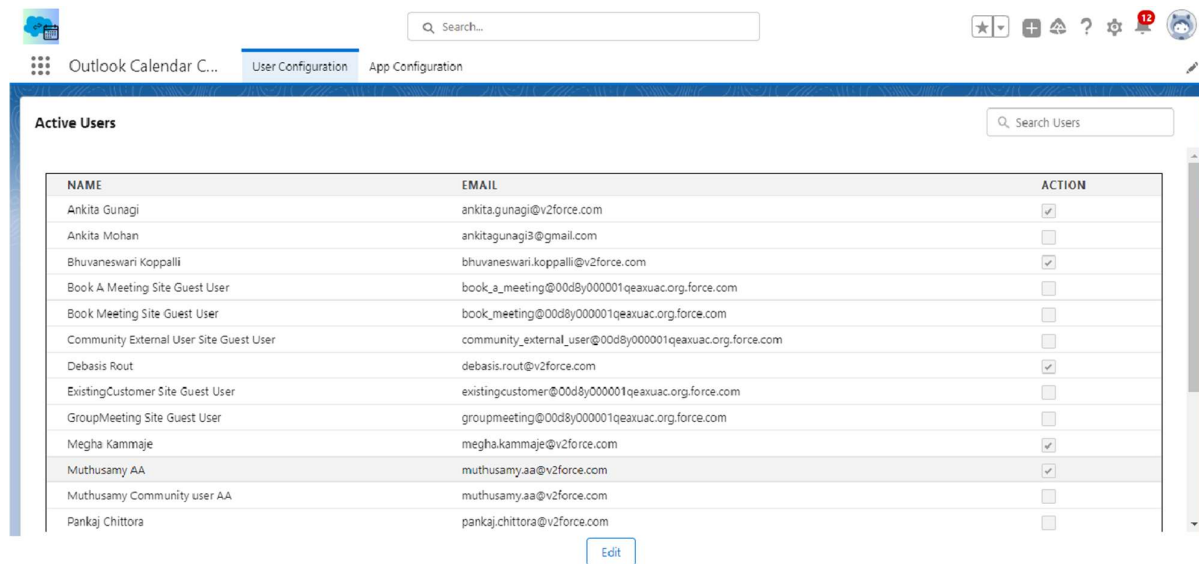
1. Go to app launcher.
2. Search for “**Outlook Calendar Connector Admin**” and click on it.



Enabling “**Standard Einstein Activity Capture**” can be done from the Outlook Calendar

Under **User configuration**,

- a. Click on edit.
- b. Enable the **action** checkbox for users you want to give “Einstein activity permission”.



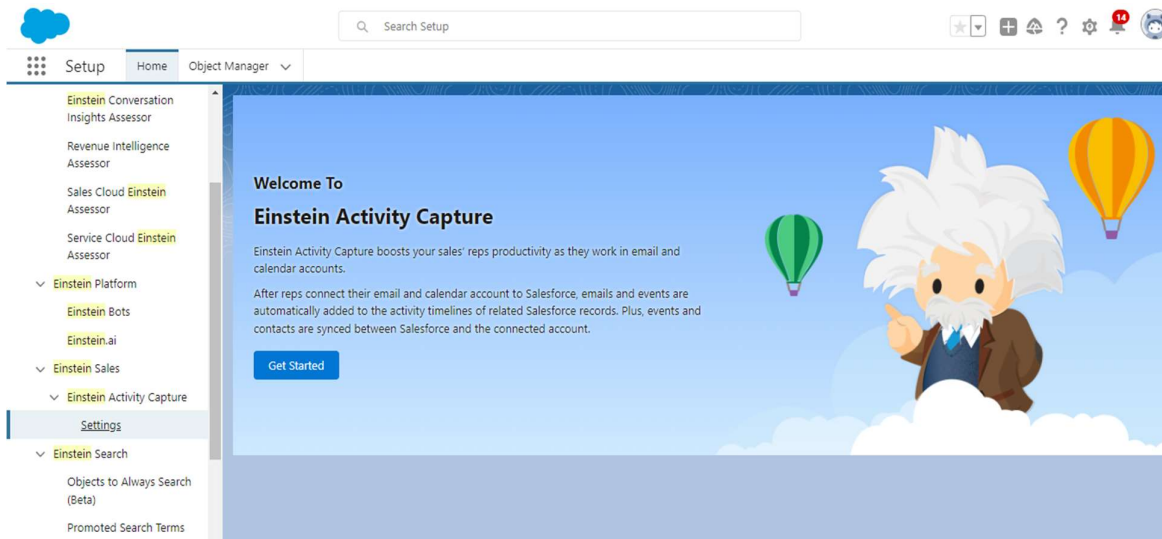
The screenshot shows the 'Active Users' section of the Outlook Calendar Connector Admin Guide. It features a table with three columns: NAME, EMAIL, and ACTION. The table lists 14 users, each with a checkbox in the ACTION column. An 'Edit' button is located at the bottom right of the table.

NAME	EMAIL	ACTION
Ankita Gunagi	ankita.gunagi@v2force.com	☒
Ankita Mohan	ankitagunagi3@gmail.com	☐
Bhuvaneswari Koppalli	bhuvaneswari.koppalli@v2force.com	☒
Book A Meeting Site Guest User	book_a_meeting@00d8y000001qeaxuac.org.force.com	☐
Book Meeting Site Guest User	book_meeting@00d8y000001qeaxuac.org.force.com	☐
Community External User Site Guest User	community_external_user@00d8y000001qeaxuac.org.force.com	☐
Debasis Rout	debasis.rout@v2force.com	☒
ExistingCustomer Site Guest User	existingcustomer@00d8y000001qeaxuac.org.force.com	☐
GroupMeeting Site Guest User	groupmeeting@00d8y000001qeaxuac.org.force.com	☐
Megha Kammaje	megha.kammaje@v2force.com	☒
Muthusamy AA	muthusamy.aa@v2force.com	☒
Muthusamy Community user AA	muthusamy.aa@v2force.com	☐
Pankaj Chittora	pankaj.chittora@v2force.com	☐

Click save.

1.3.3 Standard Einstein Activity Capture

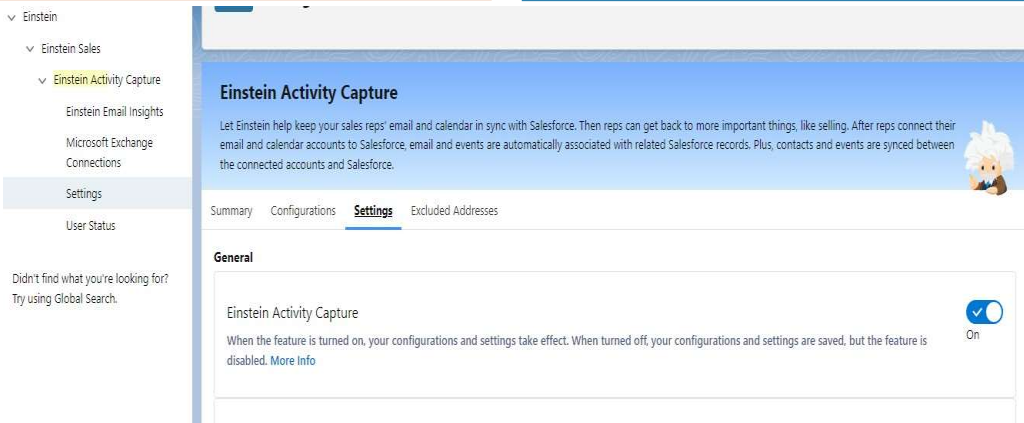
1. Go to setup.
2. Search for Einstein Activity Capture.



3. Click on Einstein Activity Capture and click on "Get started".

Navigate to Einstein activity capture and click on "Settings."

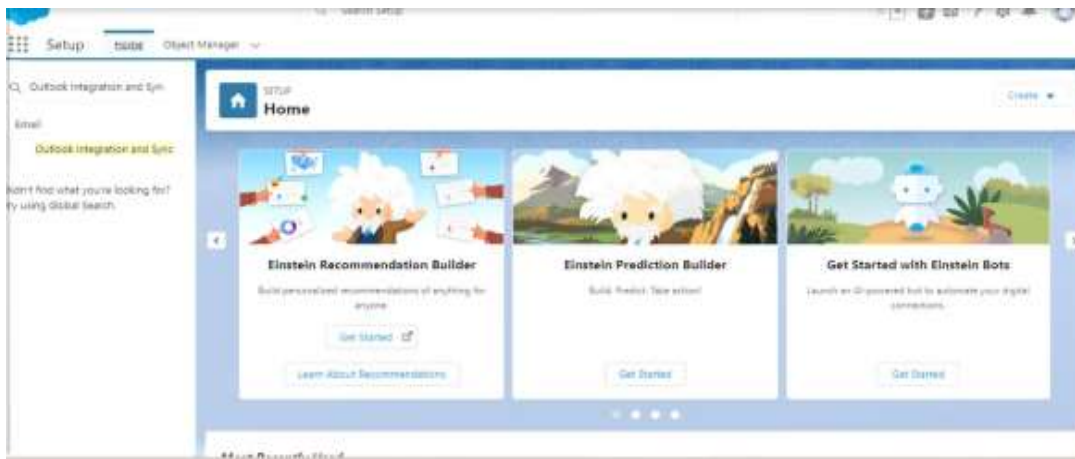
4. Go to settings and enable Einstein Activity Capture.
5. Under sharing settings, Enable Activity Sharing with Non-Einstein Activity Capture Users
6. Under Event settings, Enable Sync Internal events.
7. Search for "Outlook Integration and Sync" and click on that.



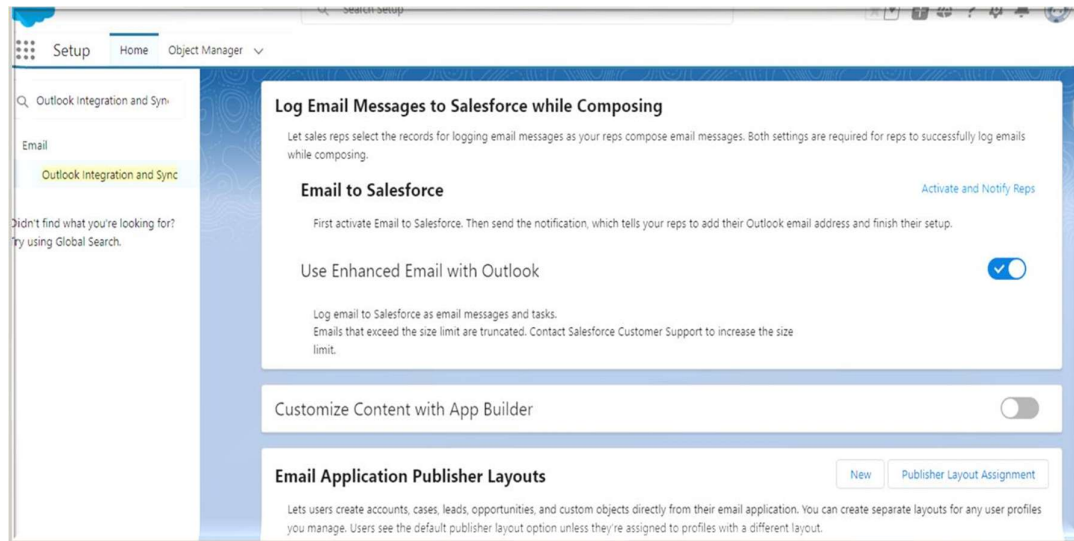
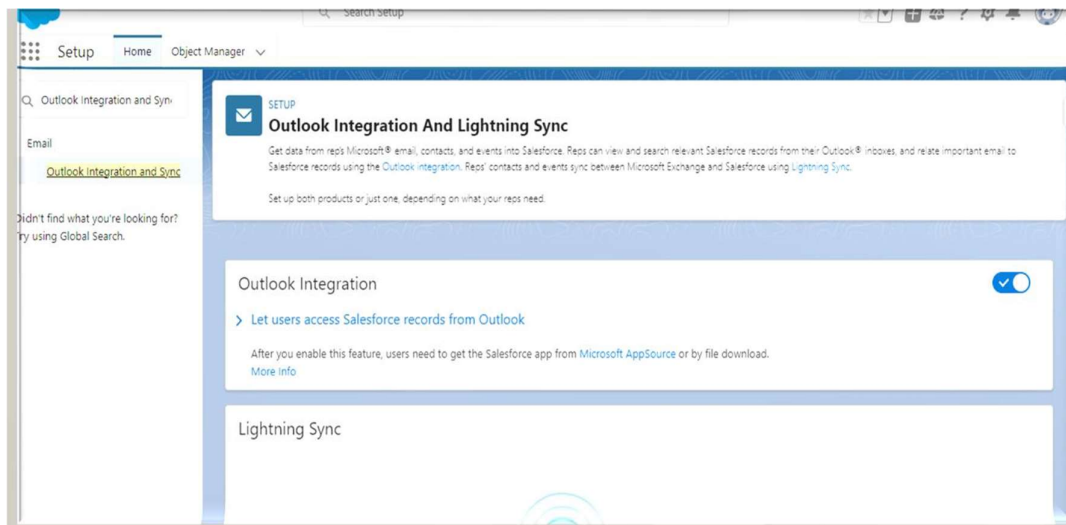
Sharing Settings



Event Settings



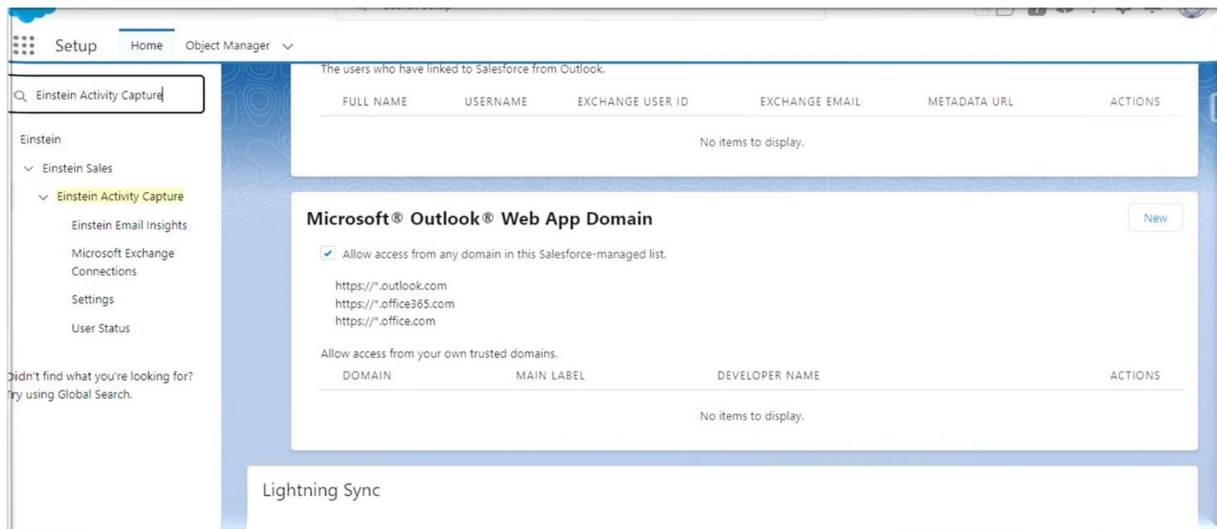
- 8.Enable the Outlook integration toggle button.
- 9.Click on "Let Users access Salesforce records from Outlook."
10. Scroll down to "Log Email Messages to Salesforce while Composing."
- 11.Enable "Use Enhanced Email with Outlook" toggle button.



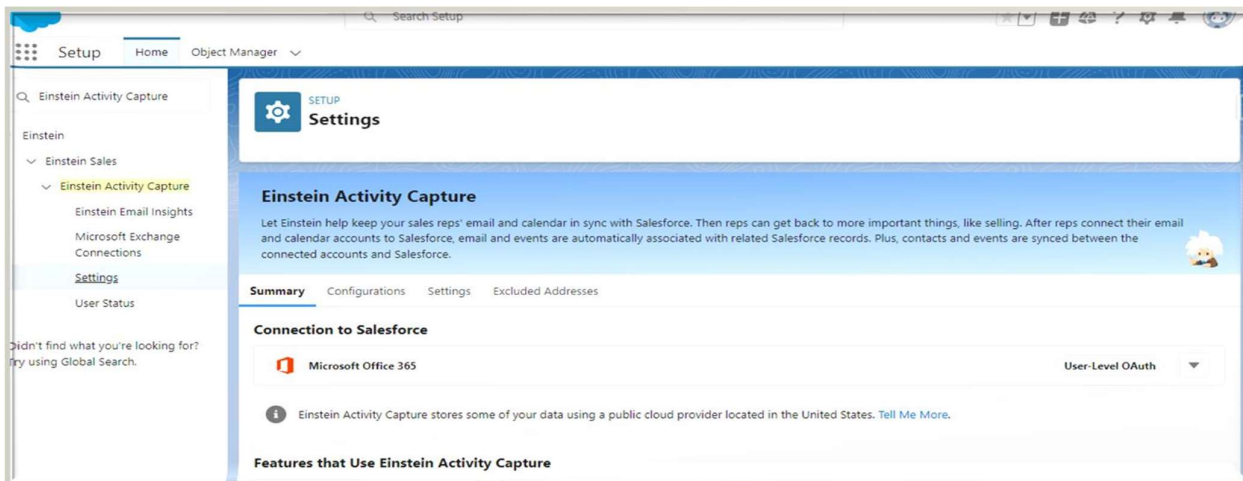
Configure your Outlook domains.

(By default, Salesforce allows Outlook to connect if your Outlook environment is running on one of three domain:

- https://*.outlook.com
- https://*.office365.com
- https://*.office.com



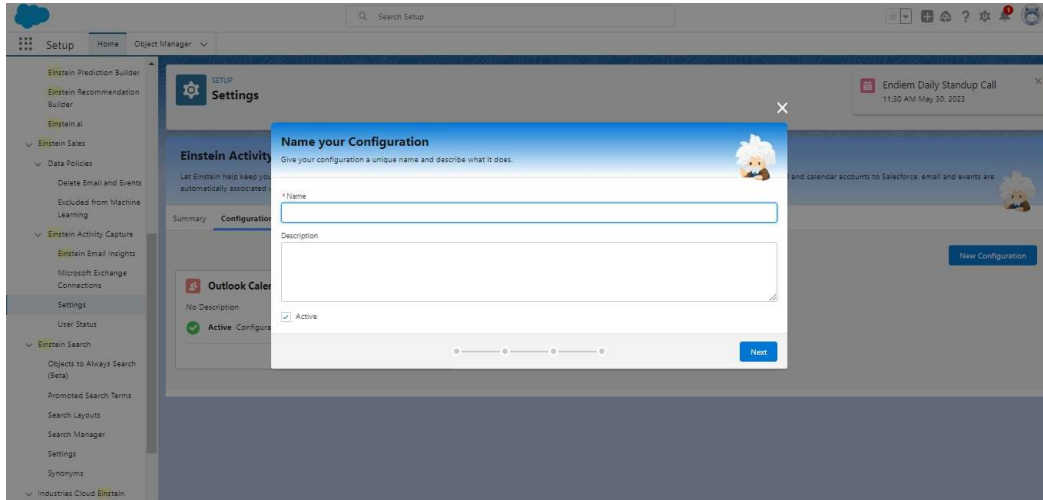
- Click on settings of Einstein Activity Capture.
- Click on Summary and authenticate your Microsoft office 365.
- Select User Level OAuth.
- And do all the necessary requirements.



on Configurations.

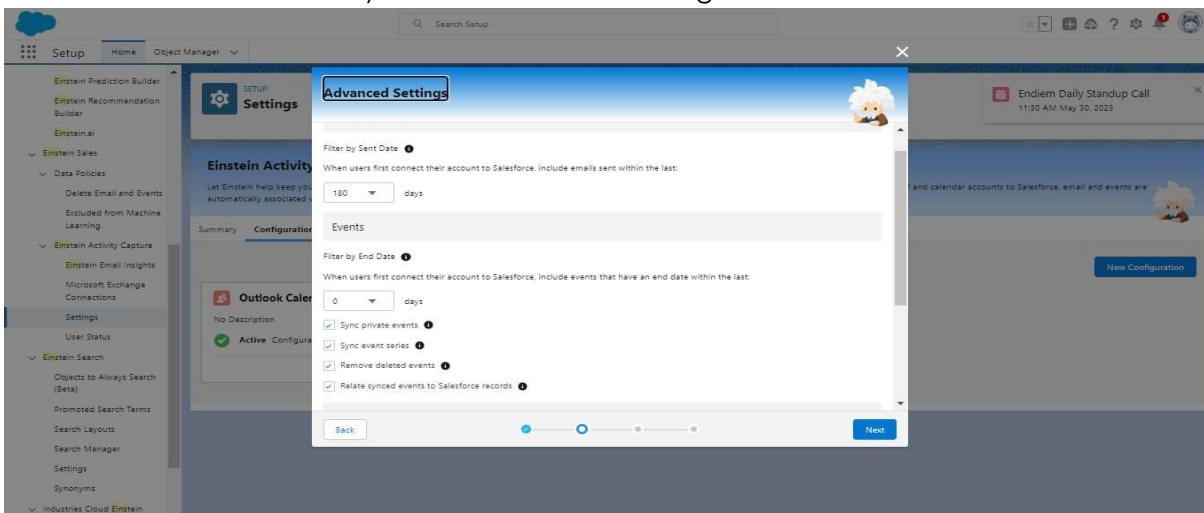
- Click on New Configuration.

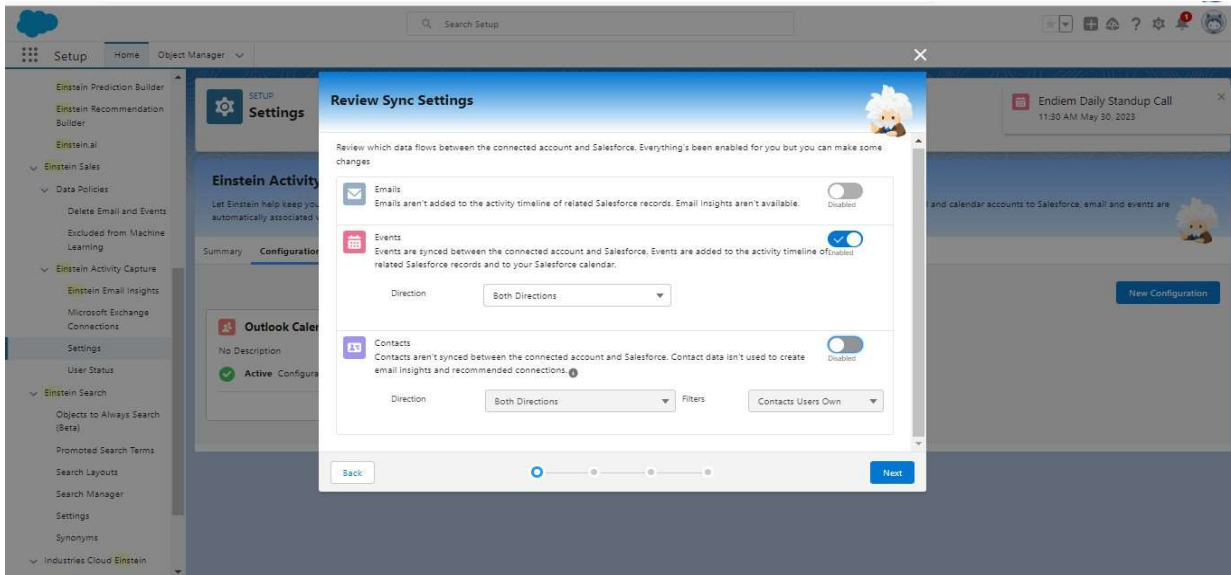
Important: If configuration is needed for a new user, then Click on New configuration in right hand side.



Give your configuration a unique name and describe what it does.

- Click the "Active" checkbox.
 - Click on Next.
 - Enable events in Both directions only.
 - Click on Next.
-
- Enable all the checkboxes you see in the below image.



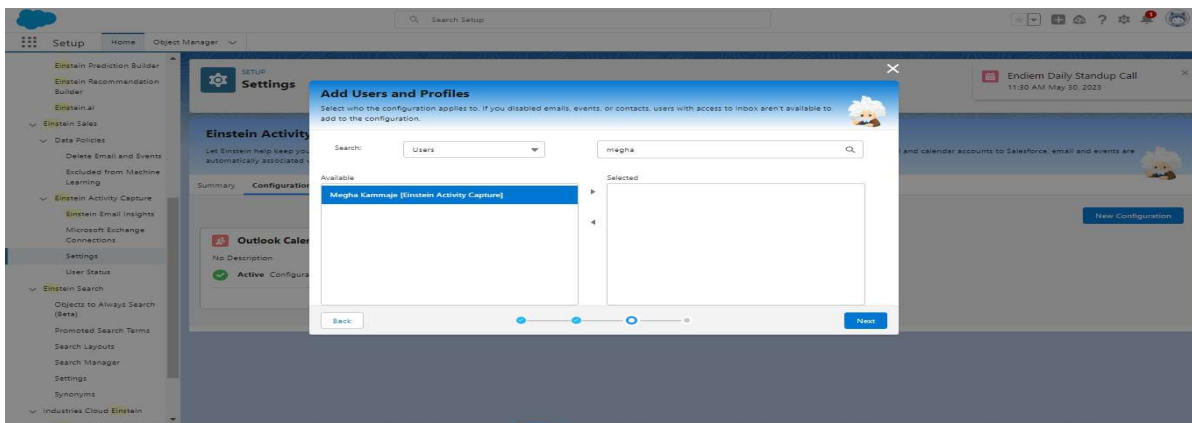


- Search for the user in the search bar above and select the user in the available present org.
- In the search picklist select **Users**.
- Select available users from the Available users list.
- Drag them into selected list.

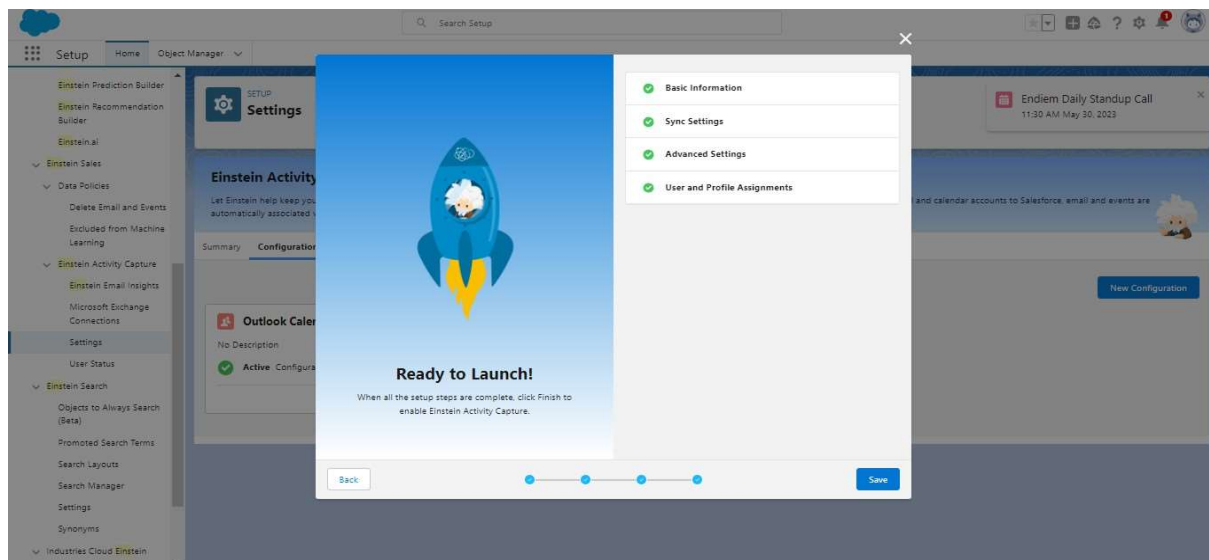
1 To use some Einstein Activity Capture features, including sync and capture, users' email addresses must match the email in their Salesforce personal settings.

Available	Selected
Megha Kammaje [Einstein Activity Capture]	System Administrator [Profile]
Vinay Vemula [Einstein Activity Capture]	Ankita Gunagi [Einstein Activity Capture]
	Bhuvaneswari Koppalli [Einstein Activity Capture]
	Debasis Rout [Einstein Activity Capture]
	Muthusamy AA [Einstein Activity Capture]
	Purnendu Sahoo [Einstein Activity Capture]

Review Settings



- Click on Next.

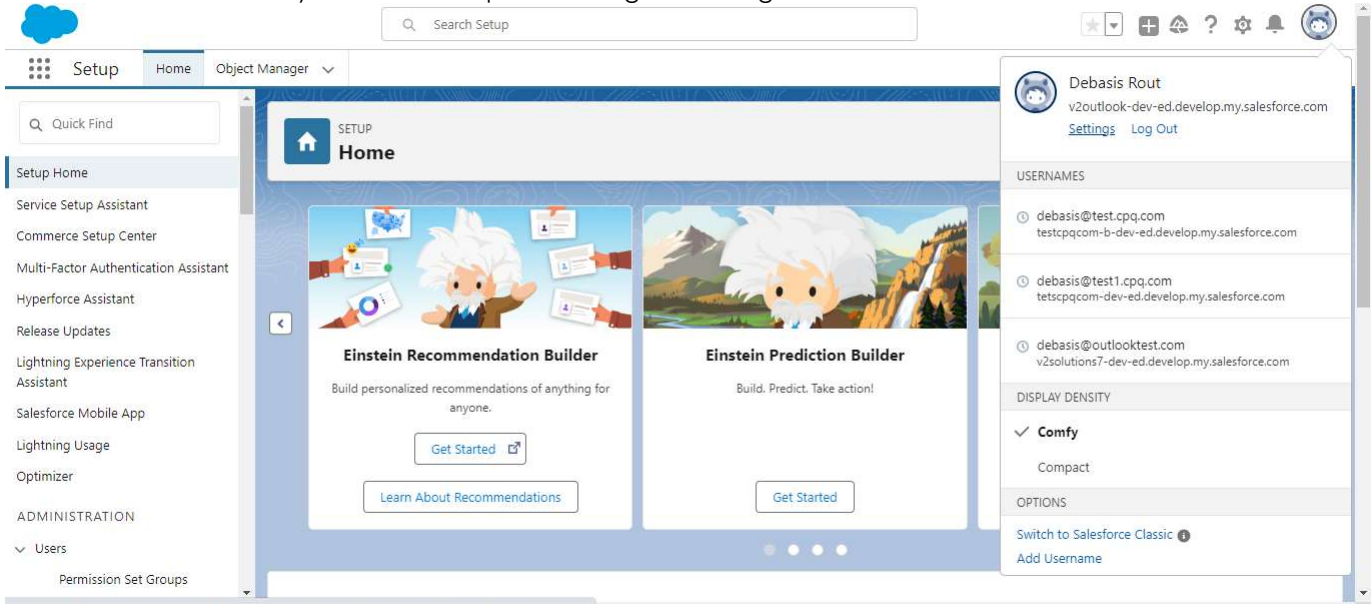


Click save.

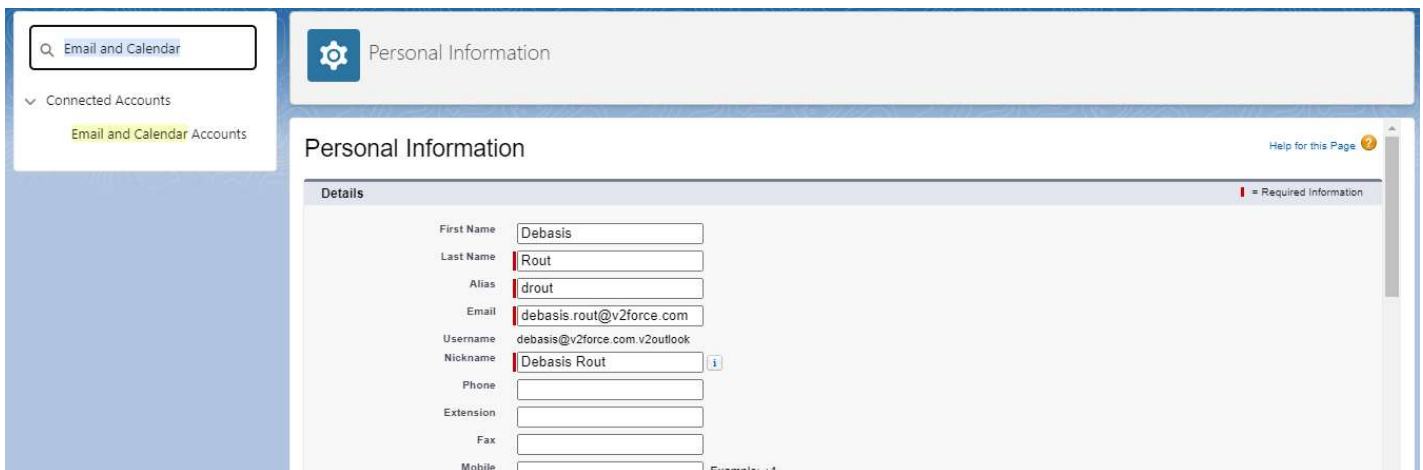
1.3.4 Email and

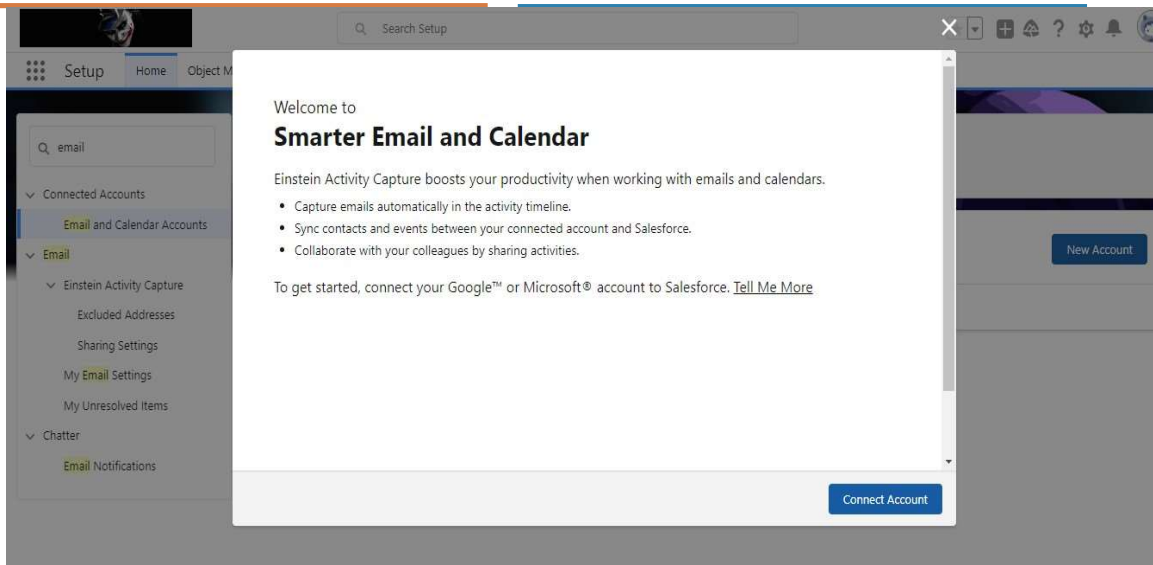
Connected accounts.

- Click on your Salesforce profile and go to settings.



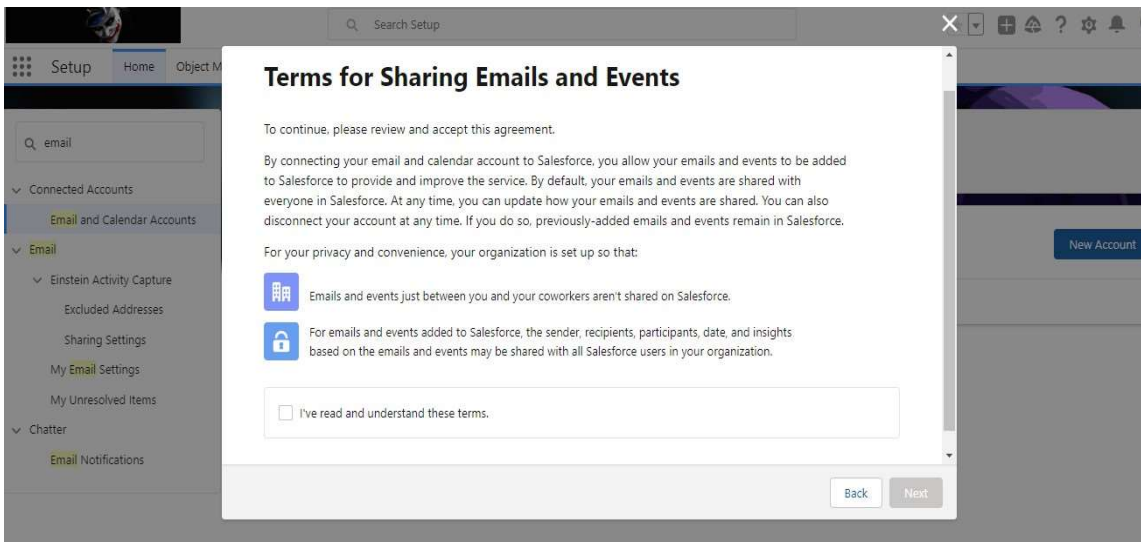
- Search for Email and Calendar accounts in quick find box.
- Click on that.





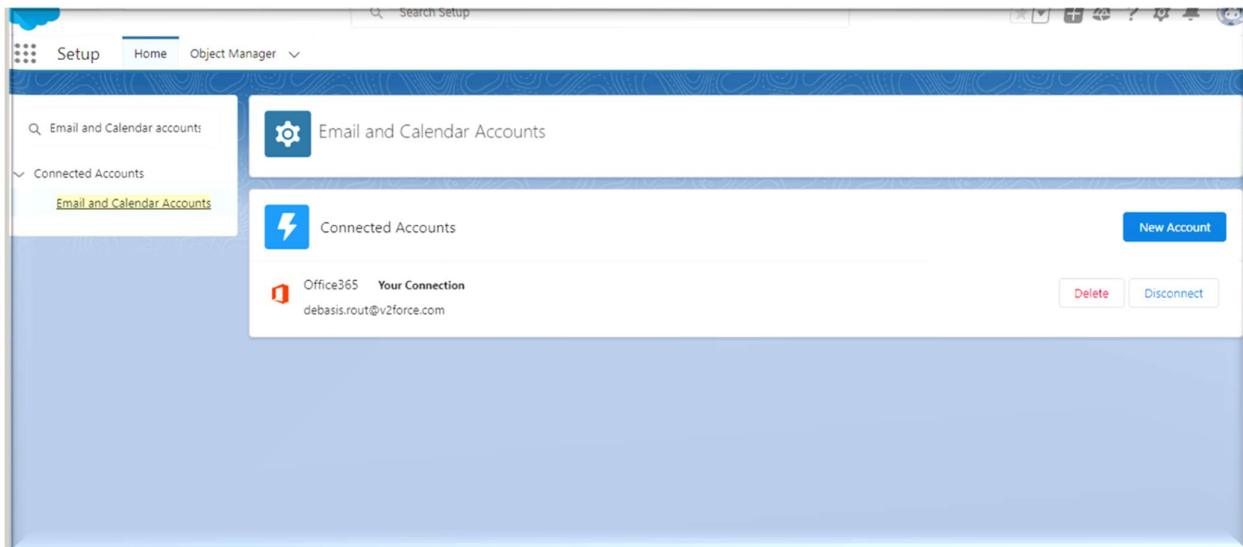
- Click on Connect Account.
- Connect you Office 365 account to connected accounts.

Enable the checkbox “I’ve read and understand these terms.”



- Click on Next.

- Authenticate your outlook account.

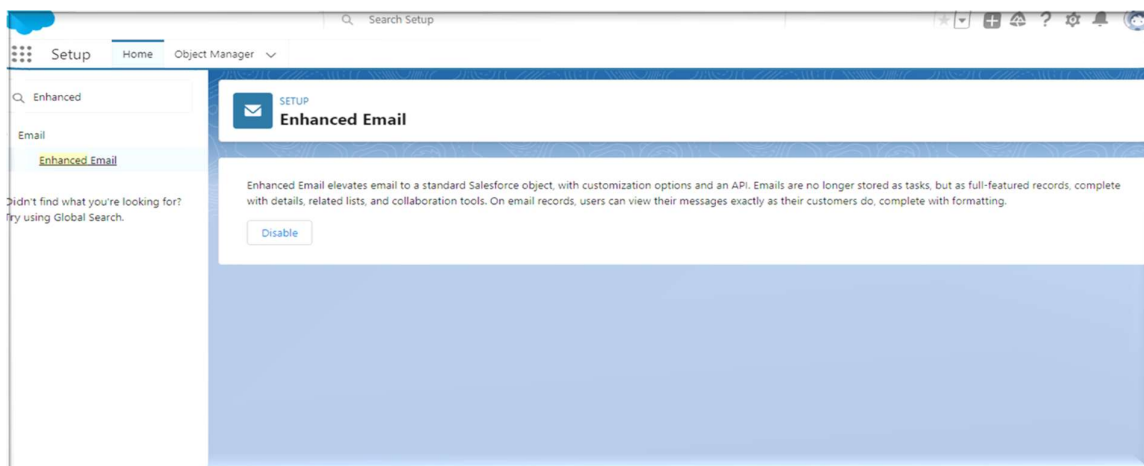


*Connect one new account to integrate.

*Connect through Office@365 email of yours.

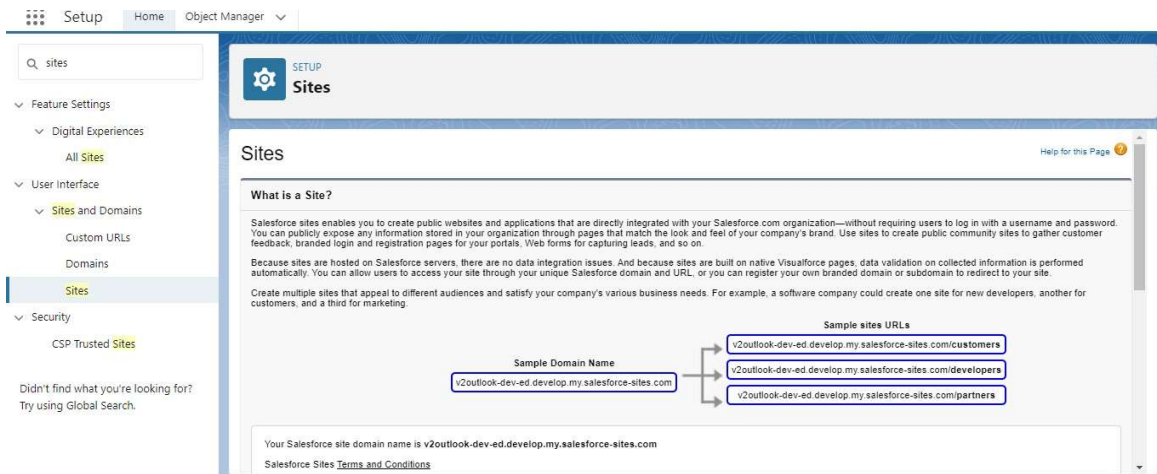
1.3.5 Enhanced Email

- Turn on Enhanced email in Salesforce Setup

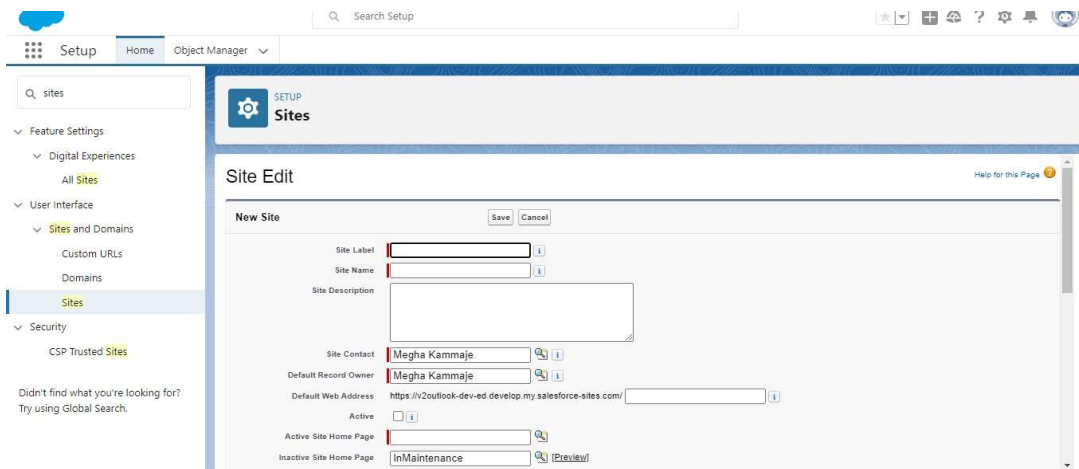


1.3.6 Enabling

sites for the visual force page access

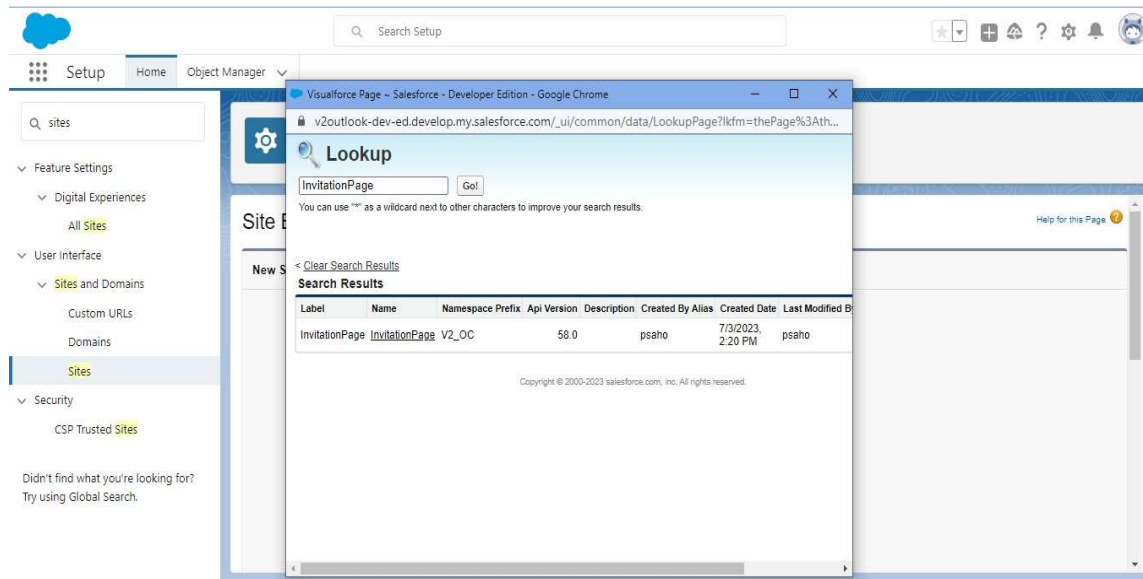


Step 1: To enable Sites (adding visualforce page) in salesforce go to **Quick Find box** and search **Sites**.



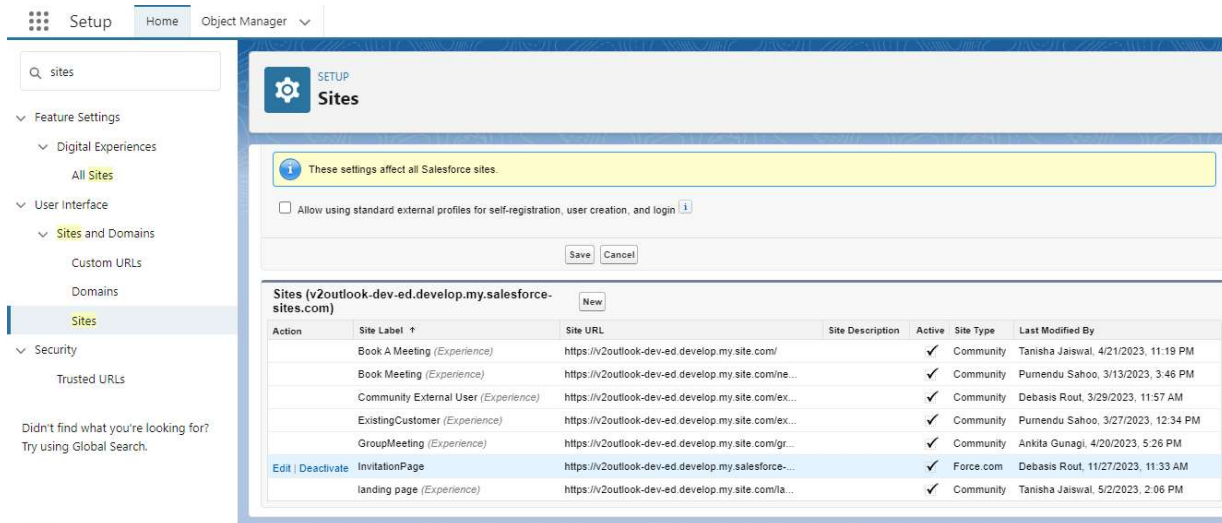
Step 2: Click new and Create Visual force page

- Give it a label as you want.
- In Active site home page add "Invitation Page".
- Check the "Active" checkbox.



Make sure the **Active** Checkbox is enabled.

- d) Select Invitation Page.
- e) Click Save.



Step 3: After creating the Visual Force Page site, Click on the newly created visualforce site.

Search: sites

- Feature Settings
 - Digital Experiences
 - All Sites
- User Interface
 - Sites and Domains
 - Custom URLs
 - Domains
 - Sites**
- Security
 - CSP Trusted Sites

Didn't find what you're looking for? Try using Global Search.

SETUP Sites

These settings affect all Salesforce sites.

☒ Allow using standard external profiles for self-registration, user creation, and login

Save Cancel

Sites (v2outlook-dev-ed.develop.my.salesforce-sites.com) [New](#)

Action	Site Label ↑	Site URL	Site Description	Active	Site Type	Last Modified By
	Book A Meeting (Experience)	https://v2outlook-dev-ed.develop.my.site.com/		✓	Community	Tanisha Jaiswal, 4/21/2023, 11:19 PM
	Book Meeting (Experience)	https://v2outlook-dev-ed.develop.my.site.com/ne...		✓	Community	Purnendu Purnendu Sahoo, 3/13/2023, 3:46 PM
	Community External User (Experience)	https://v2outlook-dev-ed.develop.my.site.com/ex...		✓	Community	Debasis Rout, 3/29/2023, 11:57 AM
	ExistingCustomer (Experience)	https://v2outlook-dev-ed.develop.my.site.com/ex...		✓	Community	Purnendu Purnendu Sahoo, 3/27/2023, 12:34 PM
	GroupMeeting (Experience)	https://v2outlook-dev-ed.develop.my.site.com/gr...		✓	Community	Ankita Gunagi, 4/20/2023, 5:26 PM
Edit Deactivate	InvitationPage	https://v2outlook-dev-ed.develop.my.salesforce-...		✓	Force.com	Debasis Rout, 7/4/2023, 10:59 AM
	landing page (Experience)	https://v2outlook-dev-ed.develop.my.site.com/la...		✓	Community	Tanisha Jaiswal, 5/2/2023, 2:06 PM

Step 4: Click on Invitation Page

Search: sites

- Feature Settings
 - Digital Experiences
 - All Sites
- User Interface
 - Sites and Domains
 - Custom URLs
 - Domains
 - Sites**
- Security
 - CSP Trusted Sites

Didn't find what you're looking for? Try using Global Search.

SETUP Sites

Site Details
InvitationPage [Help for this Page](#)

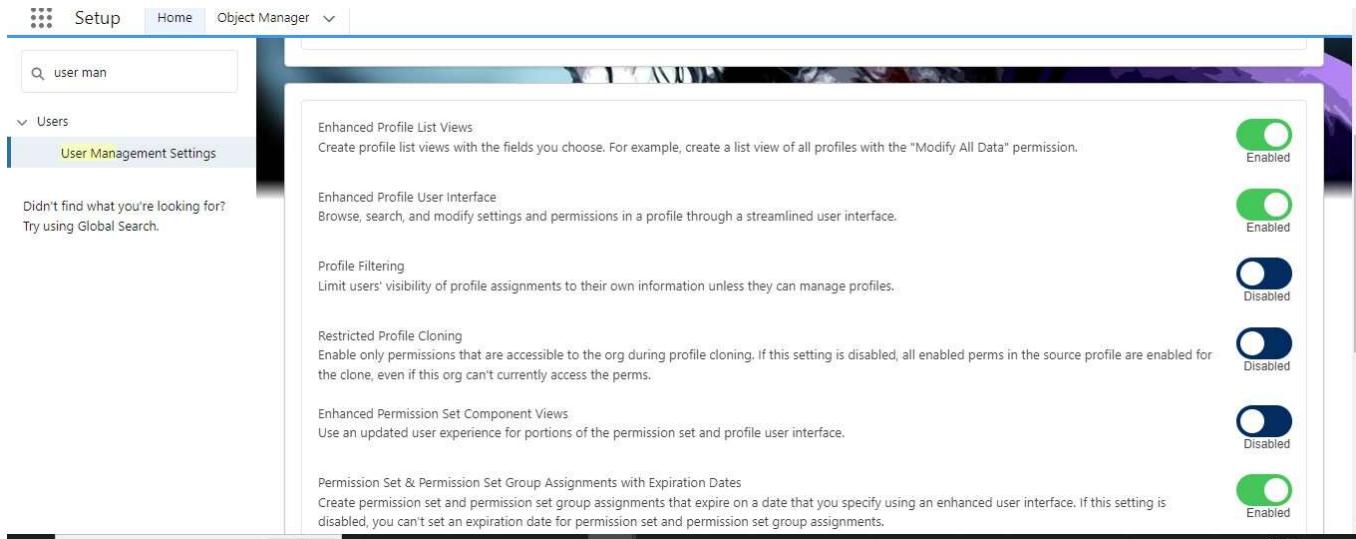
[Back to List: Sites](#)

Site Detail [Edit](#) [Public Access Settings](#) [Login Settings](#) [URL Redirects](#) [Deactivate](#)

Site Label	InvitationPage	Site Name	InvitationPage
Site Description		Site Contact	Purnendu Purnendu Sahoo
Active	☒	Login	Not Allowed
Active Site Home Page	V2_OC.InvitationPage [Preview]	Site Favorite Icon	
Inactive Site Home Page	V2_OC.InMaintenance [Preview]	Site Robots.txt	
Site Template	V2_OC.SiteTemplate [Preview]	Enable Feeds	☐
Analytics Tracking Code		URL Rewriter Class	
Clickjack Protection Level	Allow framing by the same origin only (Recommended)	Lightning Features for Guest Users	☒ i
Enable Content Sniffing Protection	☒ i	Enable Browser Cross Site Scripting Protection	☒ i
Referrer URL Protection	☒ i	Allow only required cookies for this site	☐ More Details
Guest Access to the Payments API	☐ i	Guest Access to the Support API	☐ i
Default Record Owner	Purnendu Purnendu Sahoo i	Redirect to custom domain	☒ i
Cache public Visualforce pages	☒ i		

1.3.7 Enhance Profile User Interface

- Go to setup
- Search **User Management settings**

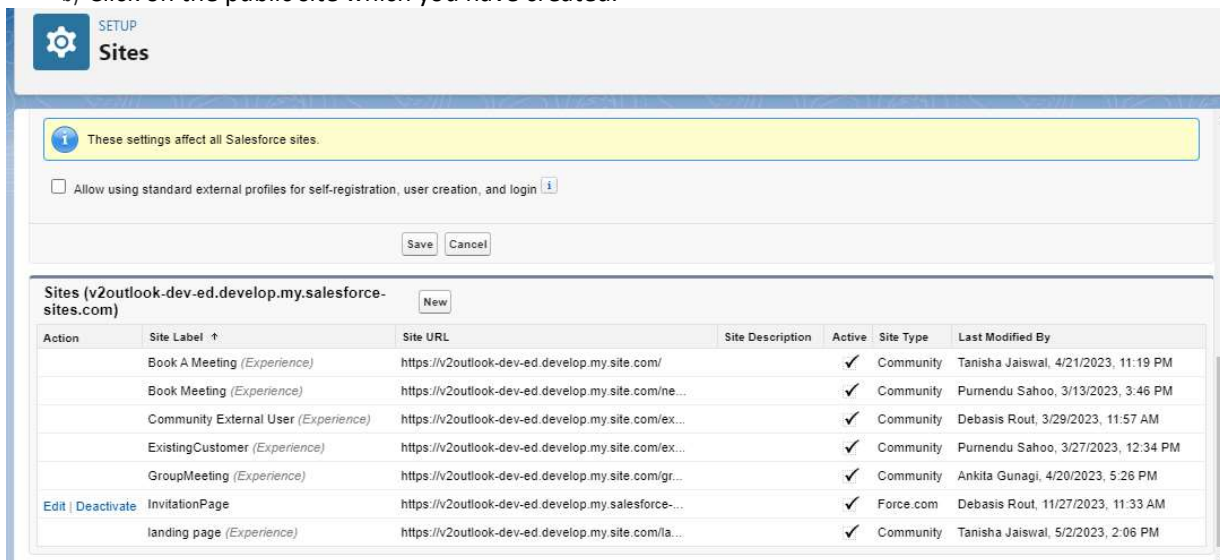


- Enable “**Enhanced Profile User Interface**” here.

1.3.8 Guest User Permissions(access)

Step 5: Go to Public access settings.

- Search **Sites** in setup
- Click on the public site which you have created.



The screenshot shows the 'InvitationPage' site details in the V2Solutions admin interface. The page has a 'SETUP Sites' header with a gear icon. Below the header, there's a 'Site Details' section for 'InvitationPage'. A navigation bar includes buttons for 'Edit', 'Public Access Settings', 'Login Settings', 'URL Redirects', and 'Deactivate'. The main content area is divided into two columns. The left column contains settings for Site Label, Site Description, Active status, Site Home Page (Active and Inactive), Site Template, Analytics Tracking Code, Clickjack Protection Level, Enable Content Sniffing Protection, Referrer URL Protection, Guest Access to the Payments API, and Default Record Owner. The right column contains settings for Site Name, Site Contact, Login, Site Favorite Icon, Site Robots.txt, Enable Feeds, URL Rewriter Class, Lightning Features for Guest Users, Enable Browser Cross Site Scripting Protection, Allow only required cookies for this site, Guest Access to the Support API, and Redirect to custom domain. Each setting has a checkbox or a text input field, and some have an information icon (i).

Site Detail	
Site Label	InvitationPage
Site Description	
Active	☒
Active Site Home Page	V2_OC.InvitationPage (Preview)
Inactive Site Home Page	V2_OC.InMaintenance (Preview)
Site Template	V2_OC.SiteTemplate (Preview)
Analytics Tracking Code	
Clickjack Protection Level	Allow framing by the same origin only (Recommended)
Enable Content Sniffing Protection	☒
Referrer URL Protection	☒
Guest Access to the Payments API	☐
Default Record Owner	Debasis Rout
Site Name	InvitationPage
Site Contact	Debasis Rout
Login	Not Allowed
Site Favorite Icon	
Site Robots.txt	
Enable Feeds	☒
URL Rewriter Class	
Lightning Features for Guest Users	☒
Enable Browser Cross Site Scripting Protection	☒
Allow only required cookies for this site	☒
Guest Access to the Support API	☐
Redirect to custom domain	☒

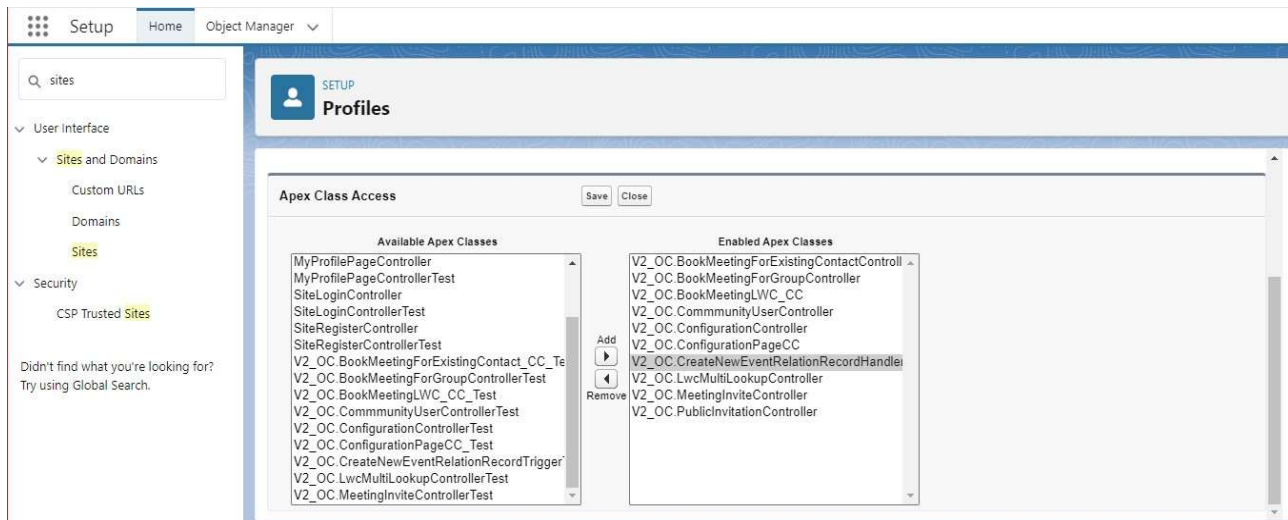
c) Click on **Public access settings**

The screenshot shows the 'Profiles' page in the V2Solutions admin interface. The page has a 'SETUP Profiles' header with a person icon. On the left, there's a sidebar with a search bar and a list of categories: Feature Settings, Digital Experiences, User Interface, Security, and CSP Trusted Sites. The main content area is titled 'Profiles' and contains a list of settings that apply to Salesforce apps. The settings are grouped into sections: Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, Visualforce Page Access, External Data Source Access, Named Credential Access, External Credential Principal Access, Flow Access, and Custom Permissions. Each section has a brief description of the settings.

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

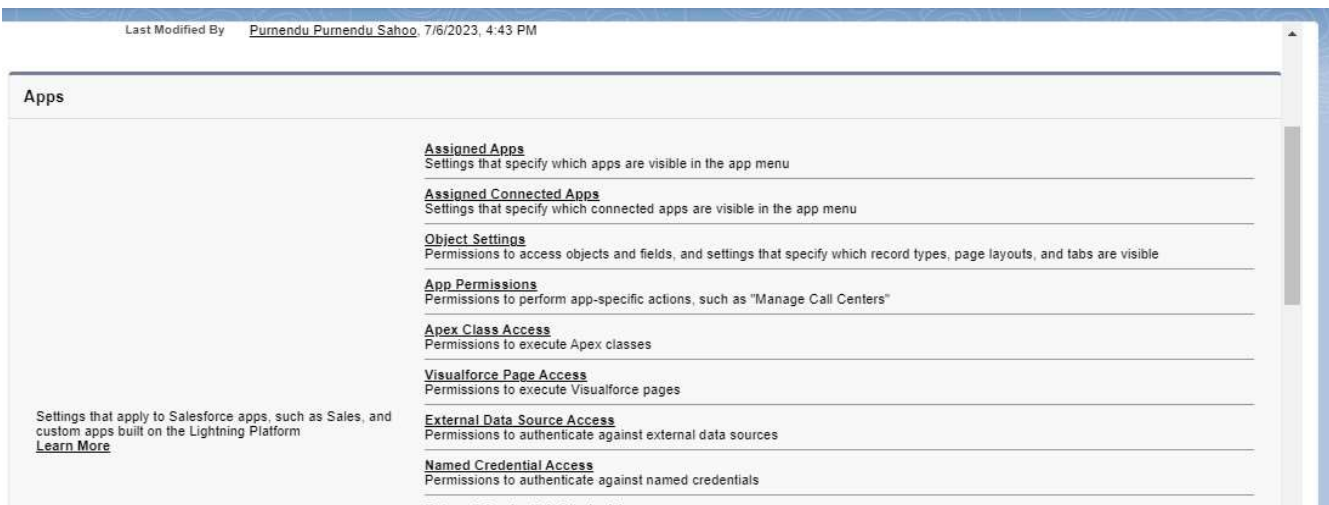
- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings that specify which record types, page layouts, and tabs are visible
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**
Permissions to execute Apex classes
- Visualforce Page Access**
Permissions to execute Visualforce pages
- External Data Source Access**
Permissions to authenticate against external data sources
- Named Credential Access**
Permissions to authenticate against named credentials
- External Credential Principal Access**
Permissions to authenticate with external credential principal mappings
- Flow Access**
Permissions to execute Flows
- Custom Permissions**
Permissions to access custom processes and apps

Step 6: Give Apex class permission(access)as below.



- Select above apex classes and add it to the enabled apex classes.
- Click Save.

Step 7: Give Object settings access as below.



- Go to object settings.
- Object Name- **Contact**

Setup Home Object Manager

Q sites

Feature Settings

Digital Experiences

All Sites

User Interface

Sites and Domains

Custom URLs

Domains

Sites

Security

CSP Trusted Sites

Didn't find what you're looking for? Try using Global Search.

SETUP Profiles

Profile Name	Access	Count	Tab	Layout
Consumer Goods Setup Assistant	--	--	Tab Hidden	--
Contact Point Addresses	No Access	20	--	Contact Point Address Layout
Contact Point Consents	No Access	18	Tab Hidden	Not Assigned
Contact Point Emails	No Access	19	--	Contact Point Email Layout
Contact Point Phones	No Access	24	--	Contact Point Phone Layout
Contact Point Type Consents	No Access	19	Default On	Contact Point Type Consent Layout
Contacts	Read, Create	33	Tab Hidden	Varies by Record Type
Content	--	--	Tab Hidden	--
Content	--	--	Tab Hidden	--
Contracts	No Access	23	Tab Hidden	Contract Layout
CreateNewEventRelationRecords	No Access	--	--	--
Customers	No Access	9	Tab Hidden	Customer Layout
Dashboards	--	--	Tab Hidden	--
Data.com	--	--	Tab Hidden	--
Datasets	--	--	Default On	--
Data Use Purposes	No Access	9	Default On	Data Use Purpose Layout
Decision Matrices	No Access	14	Tab Hidden	Decision Matrix Layout
Decision Matrix Columns	No Access	14	--	Decision Matrix Column Layout
Decision Matrix Rows	No Access	12	--	Decision Matrix Row Layout
Decision Matrix Versions	No Access	19	--	Decision Matrix Version Layout

- Give Record Type, Object permission and field permission as below.

Setup Home Object Manager

Q sites

Feature Settings

Digital Experiences

All Sites

User Interface

Sites and Domains

Custom URLs

Domains

Sites

Security

CSP Trusted Sites

Didn't find what you're looking for? Try using Global Search.

SETUP Profiles

Profile: Invitation Page Profile

Find Settings... Edit Properties

Profile Overview > Object Settings > Contacts

Contacts Edit

Tab Settings

Tab Hidden

Record Types and Page Layout Assignments

Record Types	Page Layout Assignment	Assigned Record Types	Default Record Type
--Master--	Contact Layout	☒	☒

Object Permissions

Permission Name	Enabled
Read	☒
Create	☒

Field Permissions

- Object Name- **Event**

- Click on edit.
- Give Record

Type, Object
permission and

field permission as below.

The screenshot shows the 'Setup' tab in the V2SOLUTIONS interface. On the left is a navigation pane with categories like Feature Settings, User Interface, and Security. The main area is titled 'Profiles' and shows the 'Invitation Page Profile'. It includes tabs for Profile Overview, Object Settings, and Events. Under 'Object Settings', there are sections for 'Events', 'Tab Settings' (showing 'Tab Hidden'), and 'Record Types and Page Layout Assignments'. The 'Record Types' table lists '--Master--' and 'Event Layout'. Below this is the 'Field Permissions' table.

Field Name	Read Access	Edit Access
All-Day Event	☒	☒
Assigned To	☒	☒
Attendees	☒	☒
Comments	☒	☒

- Object Name- **URL**
- Click on edit.
- Give Record Type, Object permission and field permission as below.

This screenshot shows the configuration for the 'URL' profile. It includes sections for 'Tab Settings' (Tab Hidden), 'Record Types and Page Layout Assignments', 'Object Permissions', and 'Field Permissions'.

Record Types	Page Layout Assignment	Assigned Record Types	Default Record Type
--Master--	URL Layout	☐	☐
OutlookCalendar	URL Layout	☒	☒

Permission Name	Enabled
Read	☒
Create	☒

Field Name	Read Access	Edit Access
Created By	☒	☐
Decrypted Id	☒	☐
Encrypted Id	☒	☐

Step 8: Custom Setting definitions access.

The screenshot shows the Salesforce Setup interface. On the left, the navigation menu is expanded to 'User Interface' > 'Sites and Domains' > 'Sites'. The main content area is titled 'Profiles' and lists various permissions. The 'Custom Setting Definitions' permission is highlighted, indicating it is accessible.

Search: sites

Feature Settings

- Digital Experiences
 - All Sites

User Interface

- Sites and Domains
 - Custom URLs
 - Domains
 - Sites

Security

- CSP Trusted Sites

Didn't find what you're looking for?
Try using Global Search.

Profiles

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Anex Class Access**
Permissions to execute Apex classes
- Visualforce Page Access**
Permissions to execute Visualforce pages
- External Data Source Access**
Permissions to authenticate against external data sources
- Named Credential Access**
Permissions to authenticate against named credentials
- External Credential Principal Access**
Permissions to authenticate with external credential principal mappings
- Flow Access**
Permissions to execute Flows
- Custom Permissions**
Permissions to access custom processes and apps
- Custom Metadata Types**
Permissions to access custom metadata types
- Custom Setting Definitions**
Permissions to access custom settings

- Go to custom setting definitions.
- Click on edit.
- Give access as below.

The screenshot shows the 'Custom Setting Definitions' dialog box. It has two panes: 'Available Custom Setting Definitions' and 'Enabled Custom Setting Definitions'. The 'Available' pane is empty, and the 'Enabled' pane contains 'V2_OC.InvitationUrl'. The 'Add' button is visible between the panes.

Search: sites

Feature Settings

- Digital Experiences
 - All Sites

User Interface

- Sites and Domains
 - Custom URLs
 - Domains
 - Sites

Security

- CSP Trusted Sites

Didn't find what you're looking for?
Try using Global Search.

Custom Setting Definitions [Save] [Close]

Available Custom Setting Definitions

--None--

Enabled Custom Setting Definitions

V2_OC.InvitationUrl

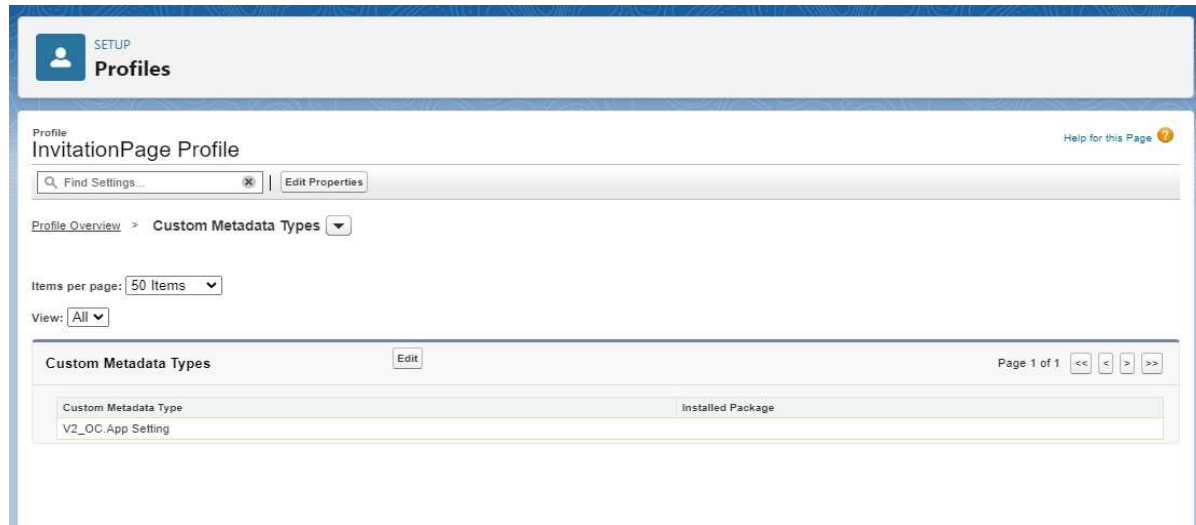
Add

Remove

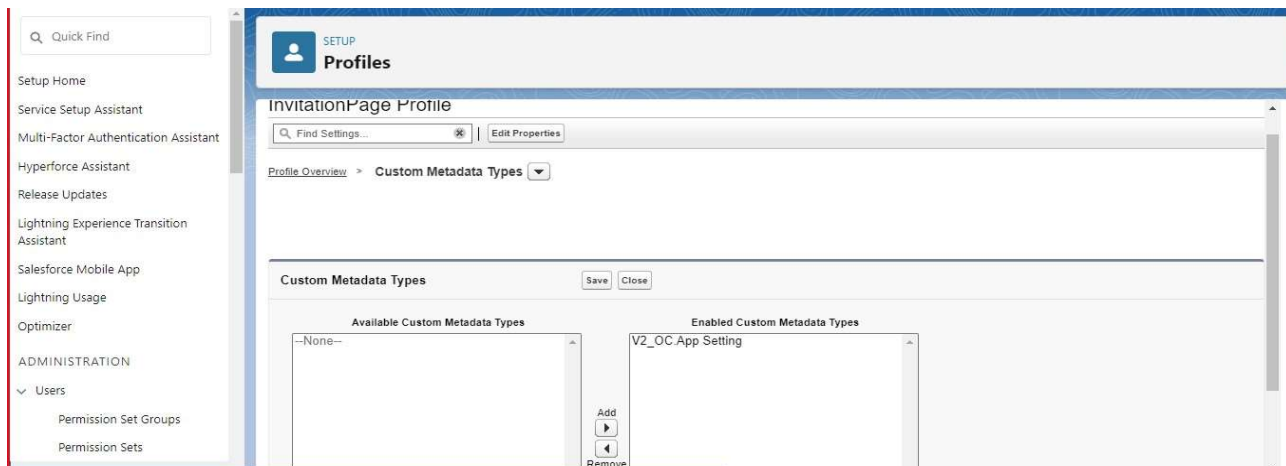
Step 9: Custom

metadata types Setting definitions access.

- Go to custom metadata setting definitions.
- Click on edit.
- Give access as below.



-Select available custom metadata types from the available box.



-Move that to Enable custom metadata types box.

Click **save**.

Step 10: System

Permissions access.

Scroll down in that Invitation page profile.

Click on System permissions.

System

Settings that apply across all apps, such as record and user management
[Learn More](#)

System Permissions
Permissions to perform actions that apply across apps, such as "Modify All Data"

Login Hours
Settings that control when users can log in

Login IP Ranges
Settings that control the IP addresses from which users can log in

Session Settings
Settings that control required session security level and timeout for inactive sessions

Password Policies
Profile Based password policies

Default Experience
Setting for assigning a default community to a user profile

Click on **Edit**.

System Permissions

Edit

▼ System

Permission Name	Enabled	Description
Access Activities	☒	Access tasks, events, calendar, and email.
Access Libraries	☒	Access libraries.
Add Recipients to CRM Analytics Notifications	☒	Specify recipients of email and Slack notifications from CRM Analytics dashboard widgets. In email, all recipient addresses appear in the "to:" field, and recipients can see each other's email addresses regardless of User Sharing settings.
Allow Access to Customized Actions	☒	Unsupported. Use the page layout editor to customize which actions show up in Salesforce and in the Salesforce mobile app.
Apex REST Services	☐	Allow access to Apex REST services
API Enabled	☐	Access any Salesforce.com API.
Edit Tasks	☒	Create, edit, and delete tasks.
Einstein Search	☐	Enable Einstein Search and show recommended search results.
Enables consumers and partners to execute OmniScripts, DRs, Cards through a Community or off platform.	☐	Enables consumers and partners to execute OmniScripts, DRs, Cards through a Community or off platform.
Give Recognition Badges in Experience Builder Sites	☐	Lets members give recognition badges to other members.
Grant users access to Industries Interaction Calculation features.	☐	Grant users access to Industries Interaction Calculation features.
Manage CRM Analytics Custom Maps	☐	Add, edit, and delete maps, and upload geoJSONs

Enable below mentioned checkbox:

- Access Activities
- Add Recipients to CRM Analytics Notifications
- Edit Tasks
- Mass Email
- Send Email
- Send Outbound Messages

Click on **Save**.

1.3.9 Update Site URL in App configuration

Once you have created Visual force page site Paste it to App configuration in Outlook Integration

a) Go to sites which you have created.

These settings affect all Salesforce sites.

☐ Allow using standard external profiles for self-registration, user creation, and login

Save Cancel

Action	Site Label	Site URL	Site Description	Active	Site Type	Last Modified By
	Book A Meeting (Experience)	https://v2outlook-dev-ed.develop.my.site.com/		✓	Community	Tanisha Jaiswal, 4/21/2023, 11:19 PM
	Book Meeting (Experience)	https://v2outlook-dev-ed.develop.my.site.com/ne...		✓	Community	Pumendu Sahoo, 3/13/2023, 3:46 PM
	Community External User (Experience)	https://v2outlook-dev-ed.develop.my.site.com/ex...		✓	Community	Debasis Rout, 3/29/2023, 11:57 AM
	ExistingCustomer (Experience)	https://v2outlook-dev-ed.develop.my.site.com/ex...		✓	Community	Pumendu Sahoo, 3/27/2023, 12:34 PM
	GroupMeeting (Experience)	https://v2outlook-dev-ed.develop.my.site.com/gr...		✓	Community	Ankita Gunagi, 4/20/2023, 5:26 PM
Edit Deactivate	InvitationPage	https://v2outlook-dev-ed.develop.my.salesforce-...		✓	Force.com	Debasis Rout, 11/27/2023, 11:33 AM
	landing page (Experience)	https://v2outlook-dev-ed.develop.my.site.com/la...		✓	Community	Tanisha Jaiswal, 5/2/2023, 2:06 PM

b) Copy the **site URL**

c) Click on App launcher and search for "Outlook Calendar Connector Admin"

Search apps and items...

Apps

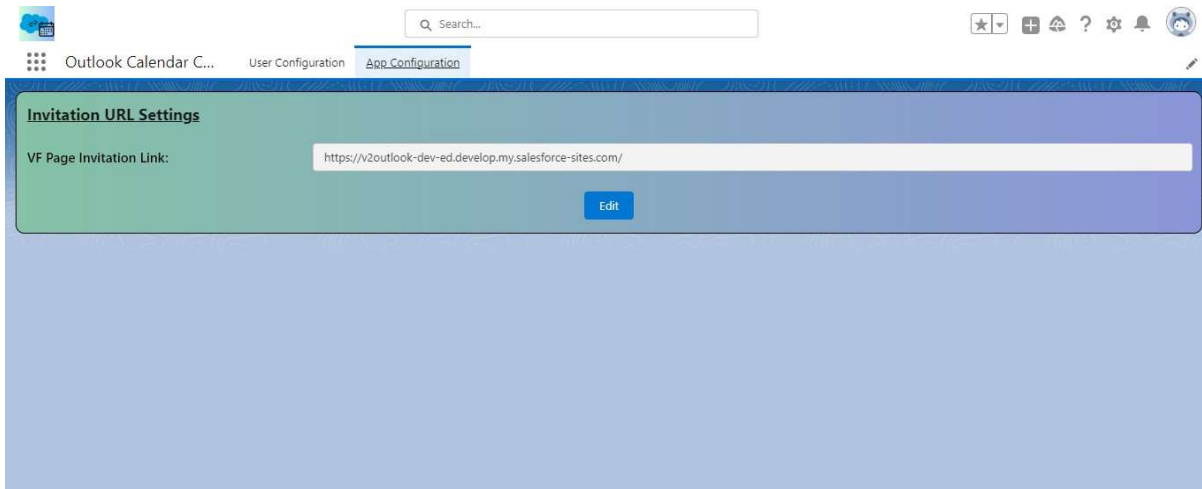
- Outlook Calendar Connector
- Outlook Calendar Connector Admin
- Service
- Marketing
- Force.com
- Community
- Content
- View All

https://v2outlook-dev-ed.develop.my.salesforce-sites.com/

Edit

admin app like

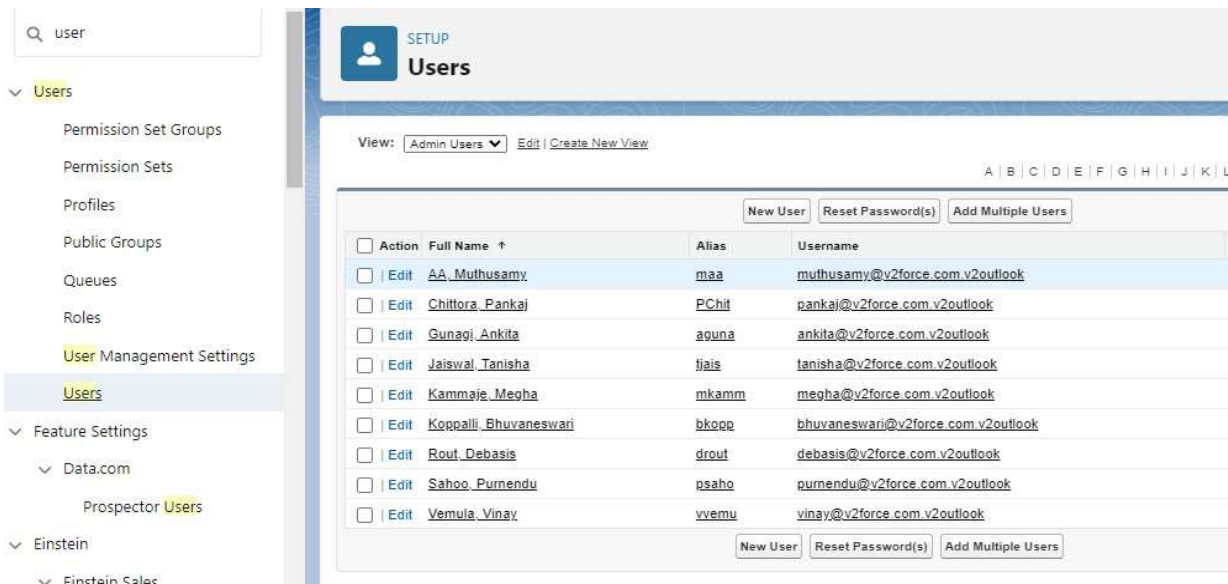
this as below:



- d) Click on App Configuration.
- e) Paste the **copied URL** of sites.
 - **Save it.**

1.3.10 Update User Information

- Go to setup -Users



- Click on edit to your profile.
- Enable **Marketing User** checkbox.

- Scroll down there and set your

**'Start of day' and
'End of day'.**

Megha Kammaje

Help

User Edit

Save

Save & New

Cancel

General Information

First Name

Megha

Last Name

Kammaje

Alias

mkamm

Email

megha.kammaje@v2force.com

Username

megha@v2force.com.v2outl

Nickname

Megha Kammaje

Title

Company

Outlook Calendar

Department

Division

Role

CFO

User License

Salesforce

Profile

System Administrator

Active

☒

Marketing User

☒

Offline User

☐

Knowledge User

☒

Flow User

☐

Service Cloud User

☐

Site.com Contributor User

☐

Site.com Publisher User

☐

1.3.11 Set Org Time zone

- Navigate to Setup
- Search Company Information in Search bar and click on it.
- Click on edit.

Q Company info

Company Settings

Company Information

Didn't find what you're looking for?

Try using Global Search.

SETUP

Company Information

Company Information

Outlook Calendar

The organization's profile is below.

User Licenses (10+)

Permission Set Licenses (10+)

Feature Licenses (12)

Usage-based Entitlements (10+)

Organization Detail

Edit Deactivate Org

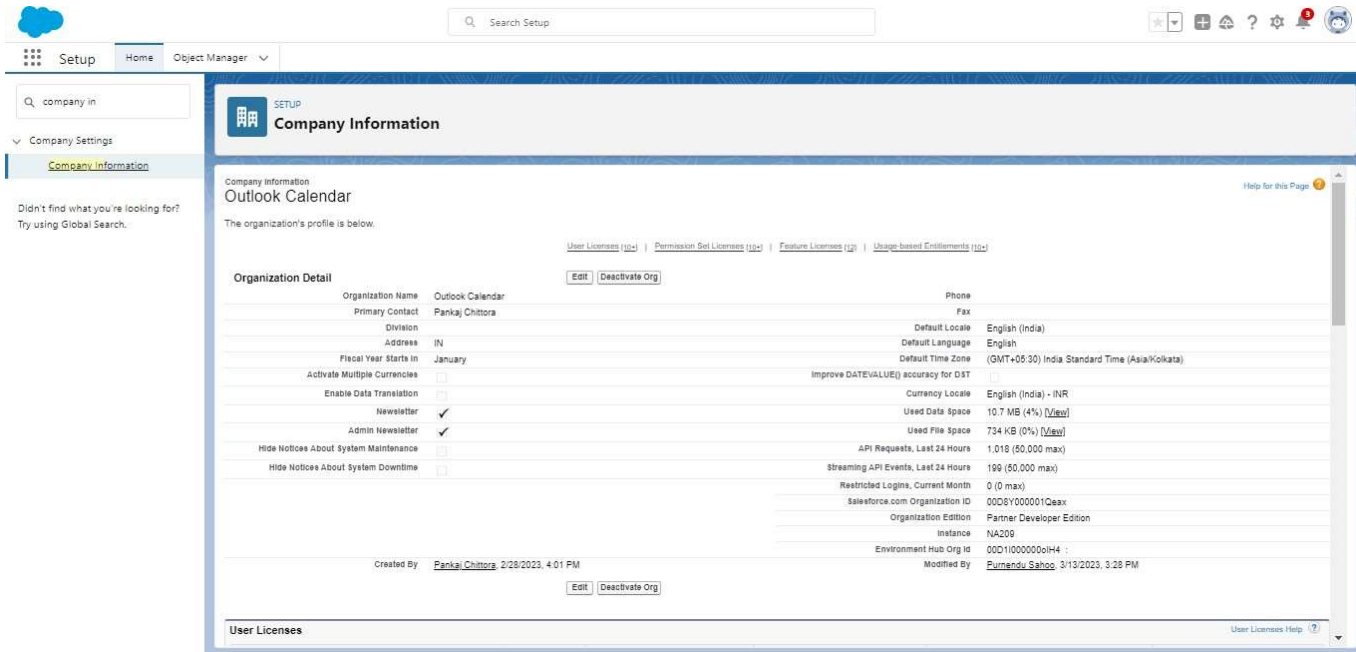
Organization Name	Outlook Calendar	Phone	
Primary Contact	Pankaj Chittora	Fax	
Division		Default Locale	English (India)
Address	IN	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	☐	Improve DATEVALUE() accuracy for DST	☐
Enable Data Translation	☐	Currency Locale	English (India) - INR
Newsletter	☒	Used Data Space	10.8 MB (4%) View
Admin Newsletter	☒	Used File Space	694 KB (0%) View
Hide Notices About System Maintenance	☐	API Requests, Last 24 Hours	124 (50,000 max)
Hide Notices About System Downtime	☐	Streaming API Events, Last 24 Hours	0 (50,000 max)

- Go to **Locale**

Settings

- Select

(GMT+05:30) India Standard Time (Asia/Kolkata) in Default Time Zone



Setup | Home | Object Manager | Search Setup

Company Information

Company Information
Outlook Calendar

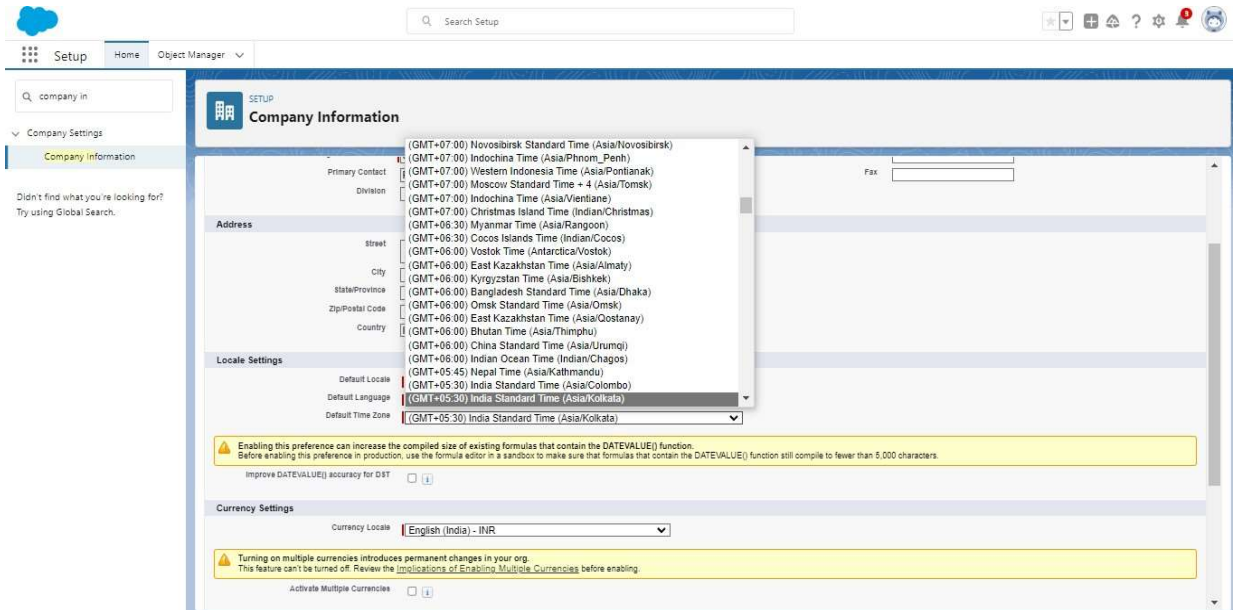
The organization's profile is below.

User Licenses (100) | Permission Set Licenses (100) | Feature Licenses (100) | Usage-based Entitlements (100)

Organization Detail

Organization Name: Outlook Calendar
Primary Contact: Pankaj Chittora
Division: IN
Address: IN
Fiscal Year Starts In: January
Activate Multiple Currencies: ☐
Enable Data Translation: ☐
Newsletter: ☒
Admin Newsletter: ☒
Hide Notices About System Maintenance: ☐
Hide Notices About System Downtime: ☐
Phone:
Fax:
Default Locale: English (India)
Default Language: English
Default Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
Improve DATEVALUE() accuracy for DST: ☐
Currency Locale: English (India) - INR
Used Data Space: 10.7 MB (4%) [View](#)
Used File Space: 734 KB (0%) [View](#)
API Requests, Last 24 Hours: 1,018 (50,000 max)
Streaming API Events, Last 24 Hours: 196 (50,000 max)
Restricted Logins, Current Month: 0 (0 max)
Salesforce.com Organization ID: 0008Y000001CeaX
Organization Edition: Partner Developer Edition
Instance: NA200
Environment Hub Org Id: 00010000000iH4 :
Modified By: Purnendu Sahoo, 3/13/2023, 3:28 PM
Created By: Pankaj Chittora, 2/28/2023, 4:01 PM
Edit | Deactivate Org

User Licenses



Setup | Home | Object Manager | Search Setup

Company Information

Company Information
Outlook Calendar

The organization's profile is below.

User Licenses (100) | Permission Set Licenses (100) | Feature Licenses (100) | Usage-based Entitlements (100)

Organization Detail

Organization Name: Outlook Calendar
Primary Contact: Pankaj Chittora
Division: IN
Address: IN
Fiscal Year Starts In: January
Activate Multiple Currencies: ☐
Enable Data Translation: ☐
Newsletter: ☒
Admin Newsletter: ☒
Hide Notices About System Maintenance: ☐
Hide Notices About System Downtime: ☐
Phone:
Fax:
Default Locale: English (India)
Default Language: English
Default Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
Improve DATEVALUE() accuracy for DST: ☐
Currency Locale: English (India) - INR
Used Data Space: 10.7 MB (4%) [View](#)
Used File Space: 734 KB (0%) [View](#)
API Requests, Last 24 Hours: 1,018 (50,000 max)
Streaming API Events, Last 24 Hours: 196 (50,000 max)
Restricted Logins, Current Month: 0 (0 max)
Salesforce.com Organization ID: 0008Y000001CeaX
Organization Edition: Partner Developer Edition
Instance: NA200
Environment Hub Org Id: 00010000000iH4 :
Modified By: Purnendu Sahoo, 3/13/2023, 3:28 PM
Created By: Pankaj Chittora, 2/28/2023, 4:01 PM
Edit | Deactivate Org

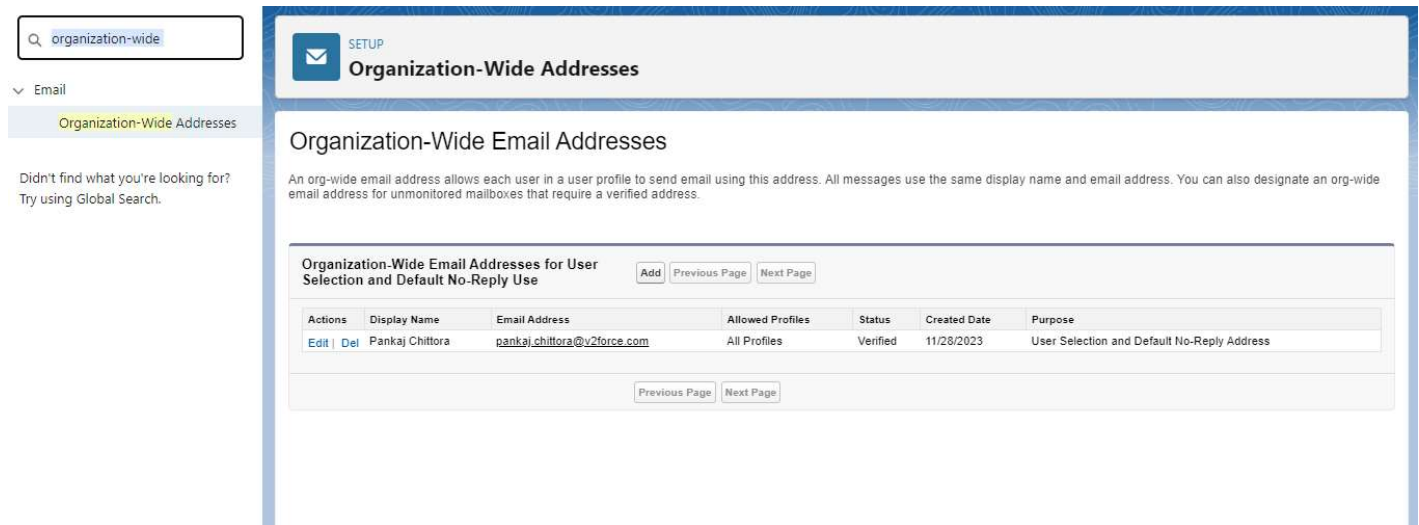
User Licenses

Save

- Click on

1.3.13 Set Org-Wide-Address

- Go to Setup
- Search for **Organization-wide addresses**



organization-wide

▼ Email

Organization-Wide Addresses

Didn't find what you're looking for?
Try using Global Search.

SETUP
Organization-Wide Addresses

Organization-Wide Email Addresses

An org-wide email address allows each user in a user profile to send email using this address. All messages use the same display name and email address. You can also designate an org-wide email address for unmonitored mailboxes that require a verified address.

Organization-Wide Email Addresses for User Selection and Default No-Reply Use [Add](#) [Previous Page](#) [Next Page](#)

Actions	Display Name	Email Address	Allowed Profiles	Status	Created Date	Purpose
Edit Del	Pankaj Chittora	pankaj.chittora@v2force.com	All Profiles	Verified	11/28/2023	User Selection and Default No-Reply Address

[Previous Page](#) [Next Page](#)

- Click on Add

✓ Email

Organization-Wide Addresses

Didn't find what you're looking for?
Try using Global Search.

SETUP

Organization-Wide Addresses

Edit Organization-Wide Email Addresses

An org-wide email address allows each user in a user profile to send email using this address. All messages use the same display name and email address. You can also designate an org-wide email address for unmonitored mailboxes that require a verified address.

Save

Save and New

Cancel

Organization-Wide Email Address

= Required Information

Display Name

Email Address

Purpose

User Selection

☐ Allow All Profiles to Use this From Address

☒ Allow Only Selected Profiles to Use the From Address

Profiles

Salesforce API Only System Integrations
B2B Reordering Portal Buyer Profile
System Administrator
Analytics Cloud Integration User
Analytics Cloud Security User
CPQ Integration User
Standard Platform User

- Enter Display Name
- Enter a valid **Email address**
- Select Purpose as “**User Selection and Default No-Reply Address**”
- Click on **Save**

THANK YOU!