



InvisibleSolutions Smart Cloud Connect Lite Installation Guide

Version 1.0.

For Microsoft Outlook Web Access Users



1) Click the **Gear** icon in the upper right corner and pick up **Manage apps**.

The screenshot shows the Outlook Web App interface. In the top right corner, the user's name 'Olana Danylchenko' is displayed next to a gear icon. A dropdown menu is open, showing options: Refresh, Set automatic replies, Display settings, **Manage apps** (highlighted with a red arrow), Offline settings, Change theme, Change password, and Options. The main content area shows an email from Lucie Good with the subject 'Quotation inquiry'.

This screenshot is similar to the previous one, showing the Outlook Web App interface with the 'Manage apps' option highlighted in the dropdown menu. The email content is more visible, showing the body text of the 'Quotation inquiry' from Lucie Good.

2) In opened window click **Plus** icon and then pick up **Add from the Office Store**.

The screenshot shows the 'installed apps' page in Outlook Web App. On the left, there is a navigation menu with 'apps' selected. The main area displays a table of installed apps. A red arrow points to a plus icon (+) in the top left of the table, which has opened a dropdown menu with three options: 'Add from the Office Store', 'Add from URL', and 'Add from file'. The table below lists several installed apps, including 'Action Items' by Microsoft.

App Name	Provider	Installed by	Enabled
for Salesforce	InvisibleSolutions	Organization	No
My Templates	Microsoft	Default	Yes
Suggested Meetings	Microsoft	Default	Yes
Unsubscribe	Microsoft	Default	Yes
Action Items	Microsoft	Default	Yes



3) In **Office Store** page type the app name in **Search** field.

The screenshot shows the Office Store interface. At the top, there's a search bar with 'smartcloud' entered and a red arrow pointing to it. Below the search bar, there are filters for 'PRODUCT' and 'CATEGORY'. The 'PRODUCT' filter is expanded, showing options like 'All', 'Excel', 'Outlook', 'PowerPoint', 'Project', 'SharePoint', and 'Word'. The 'CATEGORY' filter is also expanded, showing options like 'All', 'Communication', 'CRM', 'Editor's Picks', 'Productivity', and 'Social Media'. The main content area displays 'Apps for Outlook' with a large card for 'Uber for Outlook' and a section titled 'ENHANCE YOUR COMMUNICATIONS' featuring three app cards: 'Boomerang', 'Nimble App for Outlook', and 'Message Header Analyzer'. Below this is an 'EDITOR'S PICKS' section.

4) Click on the found app **logo**.

The screenshot shows the Office Store search results for 'smartcloud'. The search bar contains 'smartcloud'. Below the search bar, there are filters for 'PRODUCT' and 'CATEGORY'. The 'PRODUCT' filter is expanded, showing options like 'All', 'Excel', 'Outlook', 'PowerPoint', 'Project', 'SharePoint', and 'Word'. The 'CATEGORY' filter is also expanded, showing options like 'All', 'Communication', 'CRM', 'Editor's Picks', 'Productivity', and 'Social Media'. The main content area displays 'Search results for "smartcloud"'. There are tabs for 'RELEVANCE' and 'PRICE'. Below the tabs, there's a section for 'SEARCH FILTERS APPLIED: OUTLOOK' and a message 'DIDN'T FIND WHAT YOU WERE LOOKING FOR? TRY A BROADER SEARCH...'. The search results show one result: 'SmartCloud Connect Lite for Salesforce' with a description 'Office 365 and Outlook integration for Salesforce.com and Chatter', 'Outlook' category, and 'Free Trial' price. A hand icon is pointing to the app logo.

5) Click **Add** green button.



Office Store

Search the Office Store

SmartCloud Connect Lite for Salesforce

 **Free Trial**
Add

By clicking Add you agree to the terms and conditions and privacy statement and acknowledge the requirements of the add-in.

★★★★★ (4)

Office 365 and Outlook integration for Salesforce.com and Chatter
This add-in works in: Outlook 2013 or later, Outlook Online.

Tags: CRM Sales & Marketing Productivity

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Consolido Salesforce
I'm looking for...
1
2
2
2
2
Phone Account
1 OPPC

6) Wait while retrieving information... and confirm that you want to install the app.

App Installation

Please confirm that you want to install this app:

Name: SmartCloud Connect Lite for Salesforce
Published by: InvisibleSolutions
Version: 2.0.0.0
Permissions requested: Read write item
When you click this app, it will be able to access and modify personal information in the active message, such as the body, subject, sender, recipients, and attachment information. The app may send this data to a third-party service. Other items in your mailbox won't be read or modified.

yes no

7) Congratulations! You've successfully added the Smart Cloud Connect Lite to your Outlook Web App!



Search the Office Store

You've added an Add-in for Outlook

Start using your add-in:

1. Open an e-mail and look for your add-in in the gray bar at the top of the message. Your add-in will appear in e-mails where it can read content in the email. For example, with the Bing Maps add-in, you'll see the add-in on any message that contains a postal address.
2. Click the add-in name in the bar below the message header to see its content.

Get more Add-ins for Outlook

8) Go back to Outlook Web App and check the app is appeared in your email. Click on it and start your work.

The screenshot shows the Outlook Web App interface. On the left is a navigation pane with folders like 'Inbox 73' and 'Deleted Items 82'. The main area shows a list of emails. The selected email is from Lucie Good, titled 'Quotation inquiry', dated Tue 10/13/2015 4:49 PM. The email content includes a header 'To: Olena Danylchenko;', a subject 'SmartCloud Connect Lite L...', and a body starting with 'Dear Madam/Sir,'. A mouse cursor is pointing at the 'SmartCloud Connect Lite L...' subject line. The email body text reads: 'We are the Italy regional company producing wine located in Veneto. We use Salesforce for managing our clients information and Outlook for managing our communications with them. We are now looking for email integration app that will allow us to integrate SFDC with Outlook. Our partners have recommended you as an experts in such type of integration. Could you please send us an offer for subscribing of 10 users? Thank you in advance! Yours sincerely, Mrs. Lucia Good'.