INSTALLATION GUIDE · MICROSOFT 365 ADMINISTRATORS

Install Volta for Outlook

Volta for Outlook adds a **Smart Inbox** button to Outlook. When your team selects an email, Volta shows the matching customer, their orders and internal notes, without leaving Outlook. You deploy it once for your organization; nobody has to install anything on their own computer.

TIME NEEDED	WHO	WORKS IN
About 5 minutes	Microsoft 365 Global or Exchange administrator	Outlook on the web, new and classic Outlook for Windows, Outlook for Mac

Before you start

- Your organization uses **Exchange Online** mailboxes (included in Microsoft 365 Business and Enterprise plans). Plans without Exchange Online, such as *Microsoft 365 Apps for business* on its own, cannot deploy Outlook add-ins this way. If that is your case, contact us first.
- You can sign in to the Microsoft 365 admin center as a **Global** or **Exchange administrator**.
- The people who will use it have a Volta account with access to **Smart Inbox**.

MANIFEST URL · YOU WILL PASTE THIS IN STEP 3

https://outlook.voltasoftware.ai/manifest.xml

Deploy in 5 steps

1. **Open the Microsoft 365 admin center**
   Go to **admin.microsoft.com** and sign in. Then open **Settings** › **Integrated apps**.
2. **Upload the add-in**
   Select **Upload custom apps**, then choose **Office Add-in** as the app type.
3. **Point to the Volta manifest**
   Select **Provide link to manifest file**, paste the manifest URL above, then select **Validate**.
4. **Choose who gets it**
   Pick **Entire organization** or **Specific users/groups**. When assigning groups, use top-level groups: members of nested groups are not included.
5. **Accept and deploy**
   Review and accept the permissions Outlook asks for, then select **Deploy**.

That's it. Microsoft can take **up to 24 hours** to make the add-in appear for everyone. Users may need to restart Outlook before the button shows up.

Microsoft updates the admin center regularly, so menu names may differ slightly from the ones above.

For your users: first use

Share this with your team once the add-in has been deployed.

1. **Open Smart Inbox**
   Select any email, then click **Smart Inbox** on the Outlook ribbon. In Outlook on the web and the new Outlook, it may sit under the **Apps** button.

2. **Sign in**
   Enter your **workspace** (see the table below), then your usual Volta email and password.

3. **Pin the pane**
   Pin it to keep Volta open as you move from one email to the next.

What to type in Workspace

It depends on the address you normally use to open Volta in your browser.

IF YOUR VOLTA ADDRESS IS…	TYPE IN WORKSPACE
On voltasoftware.it or volta-software.com e.g. acme-bo.volta-software.com	Just the short name: **acme**
On any other domain e.g. volta.acme.com	The full server address, e.g. **https://api.acme.com**

Not sure which applies to you? Your Volta contact can give you the exact address.

Troubleshooting

IF…	THEN…
The Smart Inbox button doesn't appear	Allow up to 24 hours and restart Outlook. Check the user is a direct member of an assigned group (not a sub-group). In Outlook on the web, look under the Apps button.
Upload custom apps is missing or fails	Your plan may not include Exchange Online, or add-ins may be turned off for your organization. Contact us and we'll work it out with you.
Signing in fails	Check the workspace spelling (see the table above), then try again.
Signed in, but nothing is shown	The Volta account needs access to Smart Inbox. Ask your Volta administrator to add it.

Need a hand? Your Volta contact is happy to walk through the installation with you.