Outlook Integration with Salesforce

This guide will help you set up the **Outlook Integration** add-in, which replaces the Salesforce for Outlook app you may be familiar with, within **Outlook** and **Outlook on the Web** to connect to **Salesforce**, and show you how to log emails, events and meetings to Salesforce.

Contents

Document History

Version	Date	Author	Status	Comment
0.1	24/02/2021	Matt Rawlinson	Draft	Initial draft
1.0	25/02/2021	Matt Rawlinson	Final	Approved and published
1.1	13/01/2022	Matt Rawlinson	Final	Okta process added

Setting up Outlook Integration in Outlook

1. Make sure the Reading Pane is switched on under the **View** tab of the ribbon at the top of the screen and set to appear to the right of or below the list of emails:
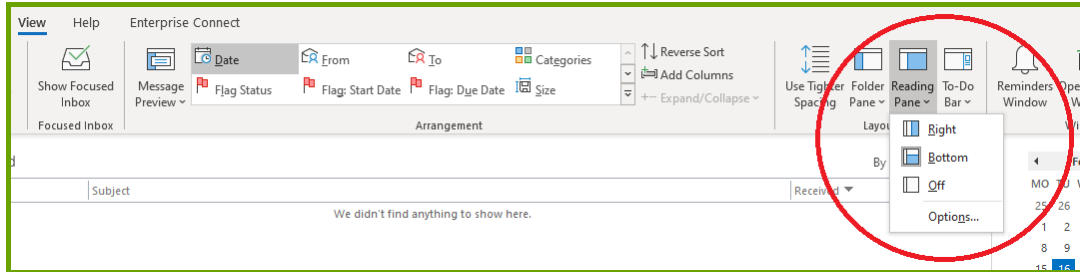

2. Single-click any email listed in the inbox or another email folder so that it is displayed in the reading pane (it does not matter which email for the purposes of this setup process).

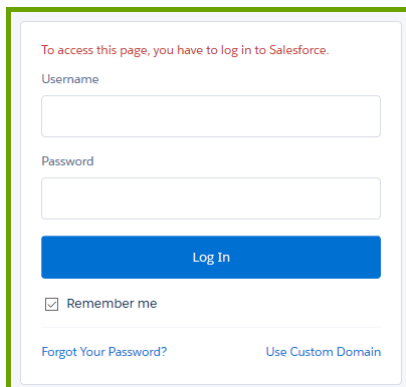3. Click the Salesforce icon under the **Home** tab of the ribbon at the top of the window:
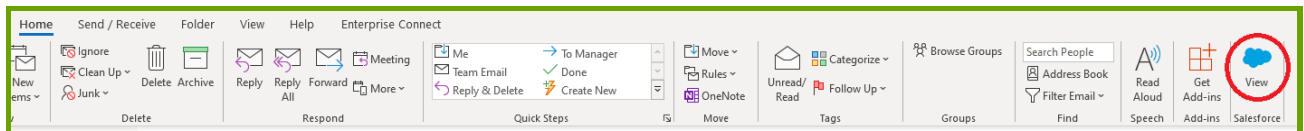
   If you cannot see the Salesforce icon, you may not have permission to use the add-in and so will need to log a ticket on **FirstPoint** to request access.
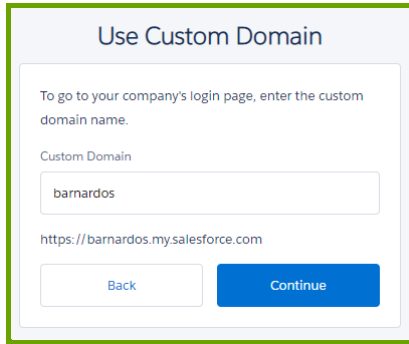
4. Make sure the **Environment** is set to **Production** and click **Log In to Salesforce**:
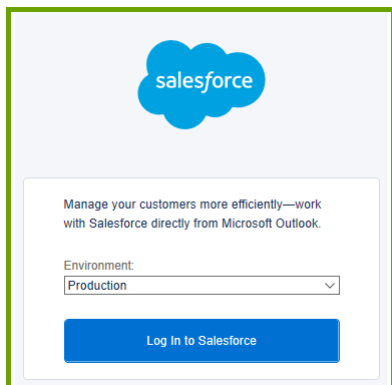
5. Click **Use Custom Domain:**

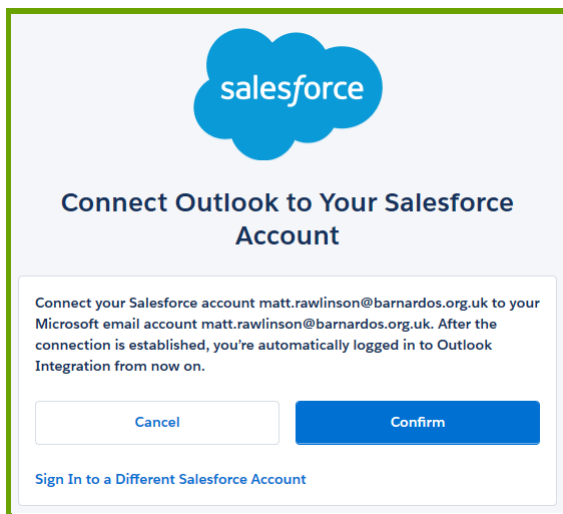6. Enter **barnardos** in the Custom Domain box provided and click **Continue**:
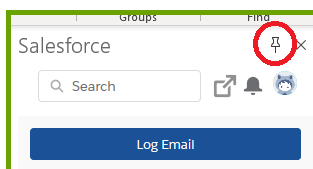
7. Click OKTA SSO:

8. Complete the necessary Okta steps to verify your identity, whether that be by confirming the push notification sent to the Okta app on your mobile device, entering the code provided by the Okta app on your mobile device, etc.
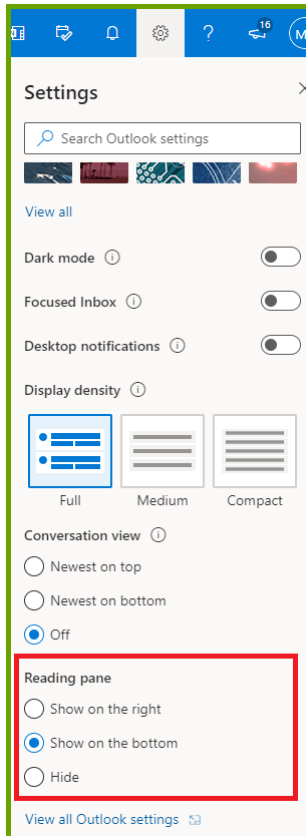
9. Click **Confirm**:

10. If you want the Salesforce pane to always be visible, click the Pin icon:

Setting up Outlook Integration in Outlook on the Web

1. Make sure the Reading pane is switched on under the Settings cog icon on the ribbon at the top of the screen and set to appear to the right of or below the list of emails:

2. Single-click any email listed in the inbox or another email folder so that it is displayed in the reading pane (it does not matter which email for the purposes of this setup process).

3. Click the More actions three-dot icon in the top right-hand corner of the email and click **Salesforce**:
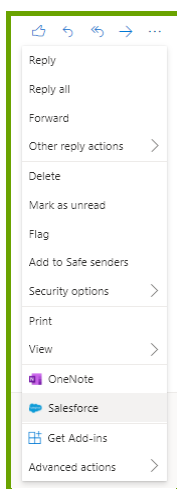
If you cannot see **Salesforce,** you may not have permission to use the add-in and so will need to log a ticket on **FirstPoint** to request access.
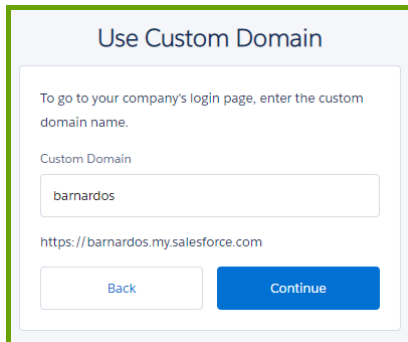
4. Make sure the **Environment** is set to **Production**, click **Log In to Salesforce** and, if the **Salesforce wants to display a new window** prompt appears, click **Allow**:
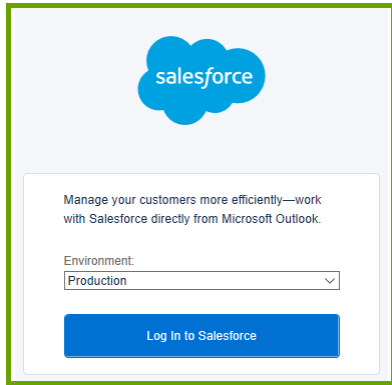
5. Click **Use Custom Domain:**
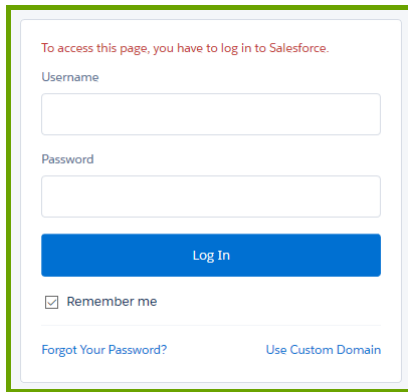
6. Enter **barnardos** in the Custom Domain box provided and click **Continue**:
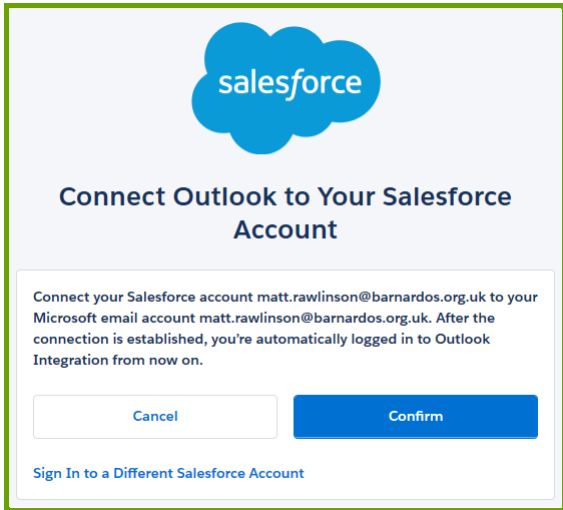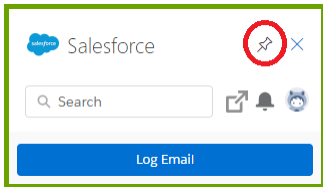

7. Click OKTA SSO:

8. Complete the necessary Okta steps to verify your identity, whether that be by confirming the push notification sent to the Okta app on your mobile device, entering the code provided by the Okta app on your mobile device, etc.
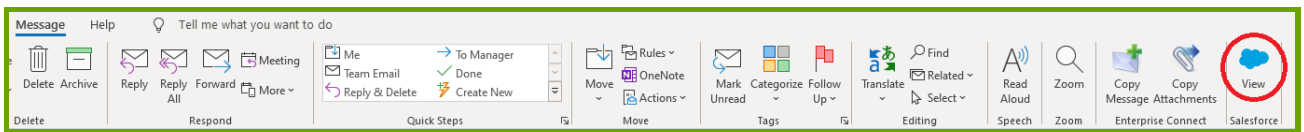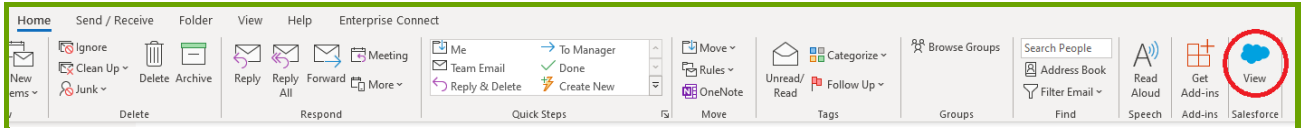
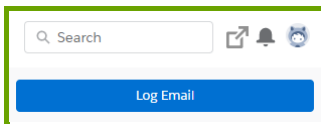9. Click **Confirm**:

10. If you want the Salesforce pane to always be visible, click the Pin icon:
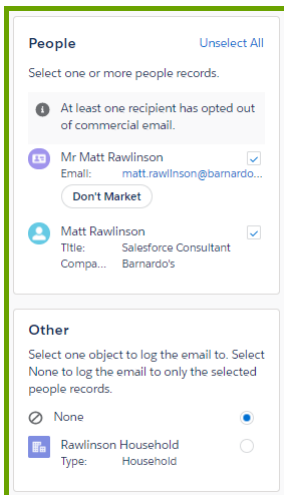
Logging an email from Outlook to Salesforce

1. Select the email you want to log to Salesforce by either single-clicking to highlight it in your list of emails or by double-clicking to open it in a separate window.

2. If the Salesforce pane is not already visible, click the Salesforce icon under the **Home** or **Message** tab of the ribbon at the top of the screen:
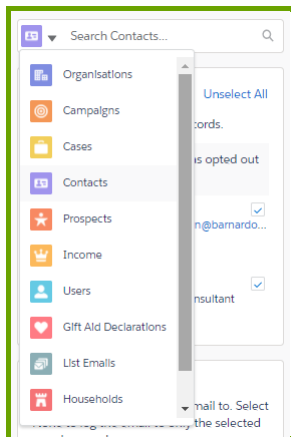

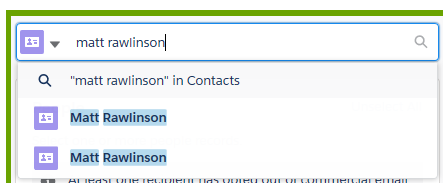3. If this is the first time you have logged an email to Salesforce, click **Log Email**:

4. The pane will display any matching Contact 🔲, Prospect ⭐ and User 👤 records found in Salesforce based on the email addresses in the selected email. It will also display related records from other Salesforce objects, including Cases and Organisations:
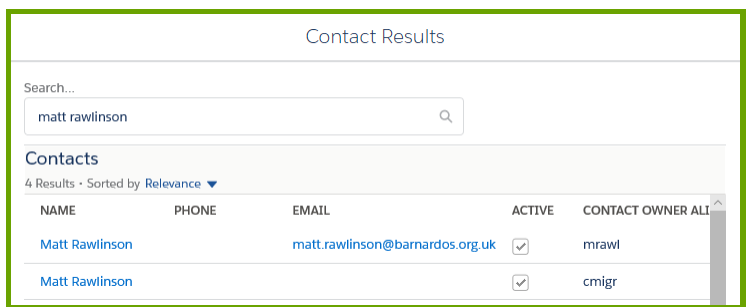

- If the record(s) required is displayed, skip to **Step 9**.
- Otherwise, continue to the next step.

5. If not already selected, specify the object you want to search from the picklist provided (the values may vary) and enter your search term:

6. As you type your search term, matching records may be suggested:

- If the required record is displayed, click it to return to the main Log Email pane where you will see the selected record now listed and skip to **Step 8**.
- Otherwise, continue to the next step.

7. Click the search term indicated by the magnifying glass (e.g. **"matt rawlinson" in Contacts**) or press the Enter key on your keyboard and a search results window will appear with more info displayed about the matching records found (you can increase the width of the Salesforce pane to make it easier to view the results):

- If the required record is displayed, click it to return to the main Log Email pane where you will see the selected record now listed.
- Otherwise, amend your search term in the **Search…** box provided.

8. If you want to log the email against more than one record, repeat the process from **Step 5**.

9. By default, all People records listed and **Include attachments** (if applicable) will be ticked, and any Other records listed will not be selected. Make sure only the required records and attachments are ticked or selected:

10. If not already selected, switch on the **Log Emails Faster** option and click **Save**:
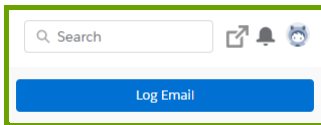
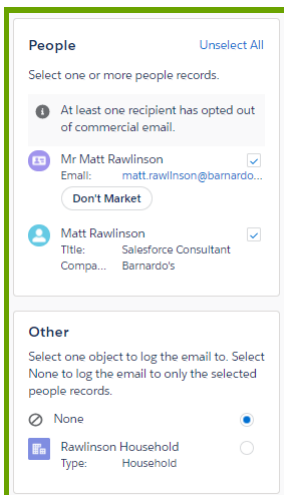# Logging an email from Outlook on the Web to Salesforce

1. Select the email you want to log to Salesforce by either single-clicking to highlight it in your list of emails or by double-clicking to open it in a separate window.

2. If the Salesforce pane is not already visible, click the More actions three-dot icon in the top right-hand corner of the email and click **Salesforce**:
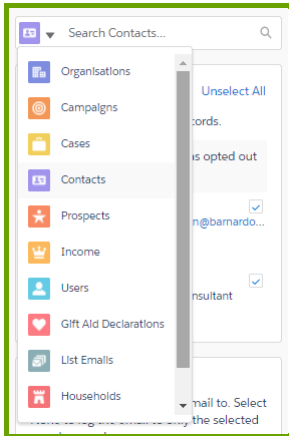

3. If this is the first time you have logged an email to Salesforce, click **Log Email**:

4. The pane will display any matching Contact 🟪, Prospect 🟧 and User 🟦 records found in Salesforce based on the email addresses in the selected email. It will also display related records from other Salesforce objects, including Cases and Organisations:
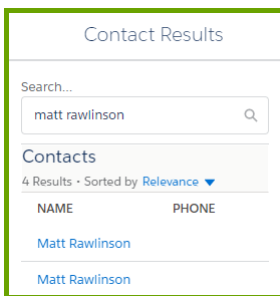

- If the record(s) required is displayed, skip to **Step 9**.
- Otherwise, continue to the next step.

5. If not already selected, specify the object you want to search from the picklist provided (the values may vary) and enter your search term:

6. As you type your search term, matching records may be suggested:

- If the required record is displayed, click it to return to the main Log Email pane where you will see the selected record now listed and skip to **Step 8**.
- Otherwise, continue to the next step.

7. Click the search term indicated by the magnifying glass (e.g. **"matt rawlinson" in Contacts**) or press the Enter key on your keyboard and a search results window will appear with more info displayed about the matching records found:

- If the required record is displayed, click it to return to the main Log Email pane where you will see the selected record now listed.
- Otherwise, amend your search term in the **Search…** box provided.

8. If you want to log the email against more than one record, repeat the process from **Step 5**.

9. By default, all People records listed and **Include attachments** (if applicable) will be ticked, and any Other records listed will not be selected. Make sure only the required records and attachments are ticked or selected:

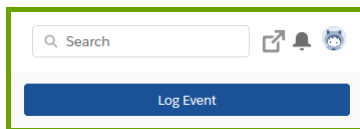10. If not already selected, switch on the **Log Emails Faster** option and click **Save**:

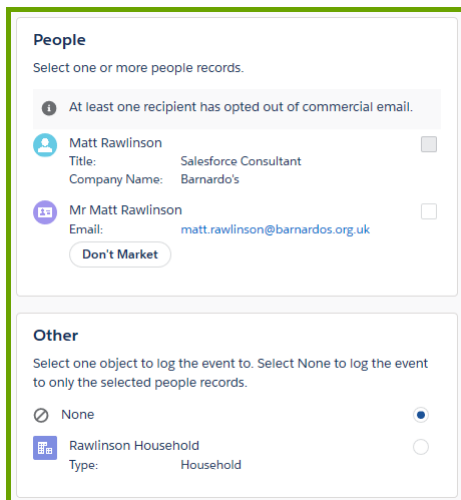## Logging an event or meeting from Outlook to Salesforce

1. Select the event or meeting you want to log to Salesforce by double-clicking to open it in a separate window.

2. Click the Salesforce icon under the **Event** or **Meeting** tab of the ribbon at the top of the screen:
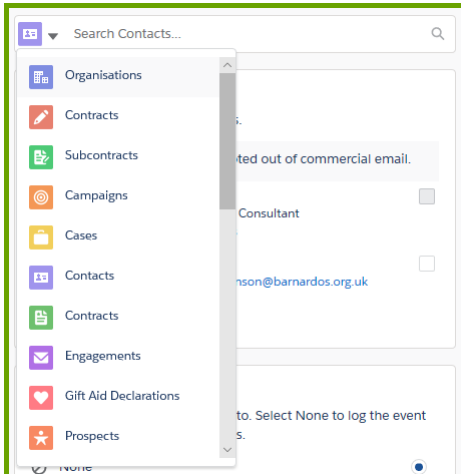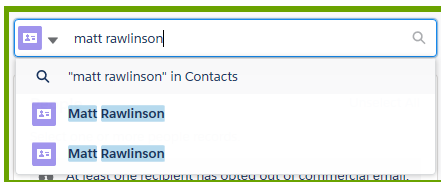

3. Click **Log Event**:

4. The pane will display any matching Contact 🪪, Prospect ⭐ and User 👤 records found in Salesforce based on the attendee email addresses in the selected event or meeting. It will also display related records from other Salesforce objects, including Cases and Organisations:
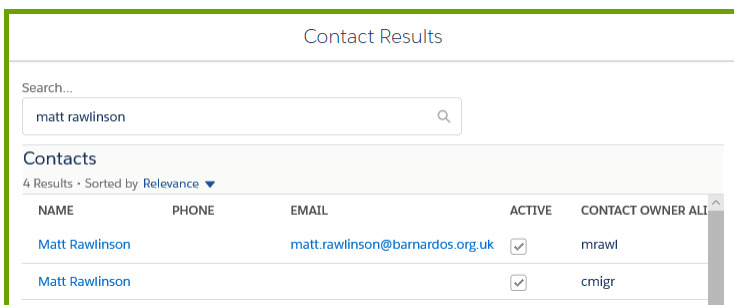

   - If the record(s) required is displayed, skip to **Step 9**.
   - Otherwise, continue to the next step.

5. If not already selected, specify the object you want to search from the picklist provided (the values may vary) and enter your search term:

6. As you type your search term, matching records may be suggested:

- If the required record is displayed, click it to return to the main Log Event pane where you will see the selected record now listed and skip to **Step 8**.
- Otherwise, continue to the next step.

7. Click the search term indicated by the magnifying glass (e.g. **"matt rawlinson" in Contacts**) or press the Enter key on your keyboard and a search results window will appear with more info displayed about the matching records found (you can increase the width of the Salesforce pane to make it easier to view the results):

- If the required record is displayed, click it to return to the main Log Event pane where you will see the selected record now listed.
- Otherwise, amend your search term in the **Search…** box provided.

8. If you want to log the event or meeting against more than one record, repeat the process from **Step 5**.

9. Make sure only the required records and attachments are ticked or selected:

10. Select the **Event Type** from the picklist provided and click **Save**:
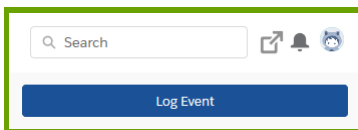
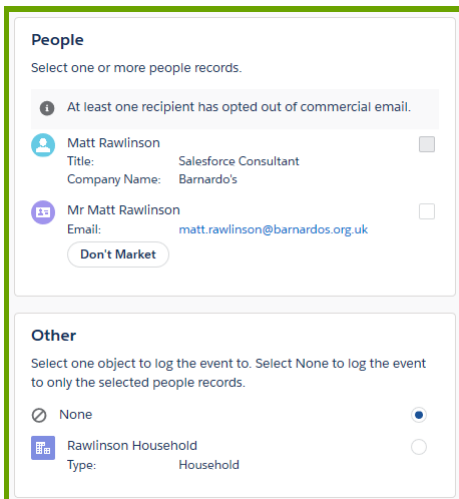# Logging an event or meeting from Outlook on the Web to Salesforce

1. Select the event or meeting you want to log to Salesforce by double-clicking to open it in a separate window.

2. Click the three-dot icon at the top of the event or meeting and click **Salesforce**:
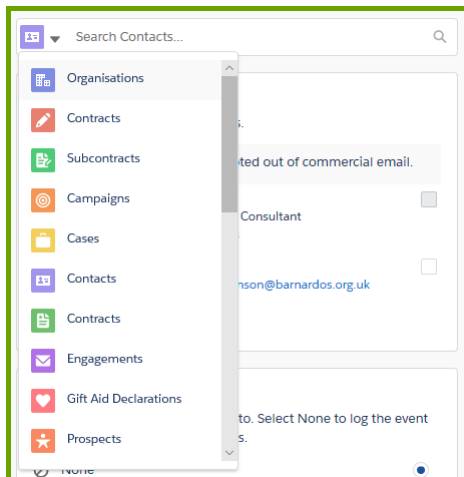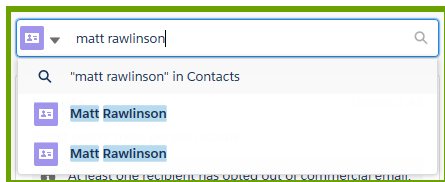

3. Click **Log Event**:

4. The pane will display any matching Contact 📇, Prospect ⭐ and User 👤 records found in Salesforce based on the attendee email addresses in the selected event or meeting. It will also display related records from other Salesforce objects, including Cases and Organisations:

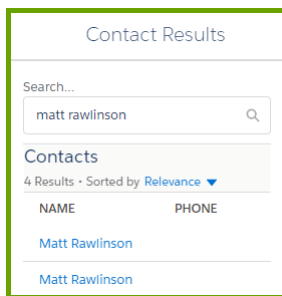

- If the record(s) required is displayed, skip to **Step 9**.
- Otherwise, continue to the next step.

5. If not already selected, specify the object you want to search from the picklist provided (the values may vary) and enter your search term:

6. As you type your search term, matching records may be suggested:

- If the required record is displayed, click it to return to the main Log Event pane where you will see the selected record now listed and skip to **Step 8**.
- Otherwise, continue to the next step.

7. Click the search term indicated by the magnifying glass (e.g. **"matt rawlinson" in Contacts**) or press the Enter key on your keyboard and a search results window will appear with more info displayed about the matching records found:

- If the required record is displayed, click it to return to the main Log Event pane where you will see the selected record now listed.
- Otherwise, amend your search term in the **Search…** box provided.

8. If you want to log the event or meeting against more than one record, repeat the process from **Step 5**.

9. Make sure only the required records and attachments are ticked or selected:

10. Select the **Event Type** from the picklist provided and click **Save**:

Who to contact if you need further help and support

- If you cannot see the Salesforce icon in Outlook or Outlook on the Web, please log a ticket on **FirstPoint** to request access.
- For all other queries, issues, ideas and suggestions please either log a **CRM Support** case in **Salesforce** or email **crmsupport@barnardos.org.uk**.