

WHAT'S NEW WITH SALESFORCE FOR OUTLOOK

Salesforce for Outlook v2.9.3

Salesforce for Outlook v2.9.3 includes improvements to the sync process for recurring events and to the installer.

For	We resolved this issue	Identification number
Sync	When users edited and saved a recurring event in Salesforce without actually making any changes, then updated the same event in Outlook, Salesforce for Outlook didn't save the updates made in Outlook.	W-2725195
	When users created identical recurring events in Outlook, Salesforce for Outlook mapped these events to the same Salesforce record. Later, when users updated one of the recurring events in Outlook, sync to Salesforce failed. The error log showed the message, "You cannot modify the start date of a recurrence series that has already started.: Start Date."	W-2745524
	Sometimes when users updated a recurring event series in Outlook from which one (or more) single events were deleted, Salesforce for Outlook didn't save the update.	W-2752964
Installer	Sometimes when users upgraded to the latest version of Salesforce for Outlook, the installer couldn't interpret the users' current version of Salesforce for Outlook, and installation failed.	W-2803908
	When users ran Outlook 2007 or Outlook 2010 on a 32-bit Windows operating system, Salesforce for Outlook installation failed.	W-2795231

Salesforce for Outlook v2.9.2

Salesforce for Outlook v2.9.2 includes support for the latest version of Microsoft® Outlook, as well as fixes to the sync process.

Salesforce for Outlook v2.9.2 Supports Microsoft® Outlook® 2016

If your company upgraded to Microsoft Outlook 2016, get your Salesforce for Outlook users back in the game by making sure they upgrade to Salesforce for Outlook v2.9.2, which supports Outlook 2016.

Before your sales reps upgrade to v2.9.2, make sure their systems meet [Salesforce for Outlook System Requirements](#).

Bug Fixes

For	We resolved this issue	Identification number
Sync	Sometimes when sales reps created a recurring event series in Outlook with a start date in the past and no assigned end date, Salesforce for Outlook imposed an end date in the past when it synced the series to Salesforce.	W-2670733
	When reps created a recurring event series in Salesforce and deleted all event occurrences (but not the series) before the recurring event synced, all events synced to Outlook anyway.	W-2698312
	Sometimes when reps updated a single event in a recurring series, the first update would sync, but subsequent updates to that single event wouldn't sync until reps updated the single event in the opposite system.	W-2726515
	Reps create sync conflicts when they update a single event in a recurring event series in one system, and update the whole event series in the other system. When this happened, sometimes Salesforce for Outlook reverted both updates, rather than syncing the update that affected the whole series.	W-2744463
	When a rep extended the end date of a recurring event series in Outlook, future updates to that series didn't sync. The error log sometimes showed the message "The end date of a recurring series cannot be set to a date in the past.:End Date."	W-2732845
	Sometimes when reps marked an Outlook event to sync that was identical to an Outlook event that was already syncing, the second Outlook event didn't sync to Salesforce. The error log showed the messages "An item with the same key has already been added" or "An entry with the same key already exists."	W-2744463
Adding Outlook emails to Salesforce	When reps using 64-bit Microsoft Windows® installed Salesforce for Outlook for all users logging into that computer, the <code>Add Email</code> button wasn't available on the Outlook Ribbon and the <code>Send</code> and <code>Add</code> toolbar wasn't available in Outlook Add-Ins.	W-2741760

Salesforce for Outlook v2.9.1

We've broadened our support to include Microsoft® Windows® 10 and added features that give your sales reps even more ways to get their Salesforce work done quickly and easily from within Microsoft Outlook®. You and your sales reps can manage this feature from both Lightning Experience and Salesforce Classic.

Let's get down to the nitty gritty on Salesforce for Outlook v2.9.

EDITIONS

Available in: Salesforce Classic

Available in all editions

What's new	This means that	Learn about it in
Microsoft Windows 10 support	More users can increase productivity using Salesforce for Outlook.	Salesforce for Outlook Supports Microsoft® Windows® 10

What's new	This means that	Learn about it in
Sync Outlook home address fields with Salesforce	Users maintaining home addresses for their Outlook contacts don't need to update those fields in both systems.	Sync Outlook Home Addresses to Your Salesforce Contacts
View records related to an event series from the Salesforce Side Panel	If users relate records to an event series in Salesforce, they can view those related records directly from Outlook.	View Salesforce Records Related to Recurring Events From Outlook
Salesforce App for Outlook disables the side panel automatically	Users encounter a streamlined Outlook integration experience, instead of juggling two Salesforce features simultaneously.	Salesforce App for Outlook Disconnects the Salesforce Side Panel Automatically
We've fixed some product bugs	You won't run into these pesky bugs any longer.	Bug Fixes

Salesforce for Outlook Supports Microsoft® Windows® 10

Now sales reps running Windows 10 can take advantage of Salesforce for Outlook—our most advanced email integration feature. Make sure that your reps' computing environments meet all Salesforce for Outlook system requirements before getting started.

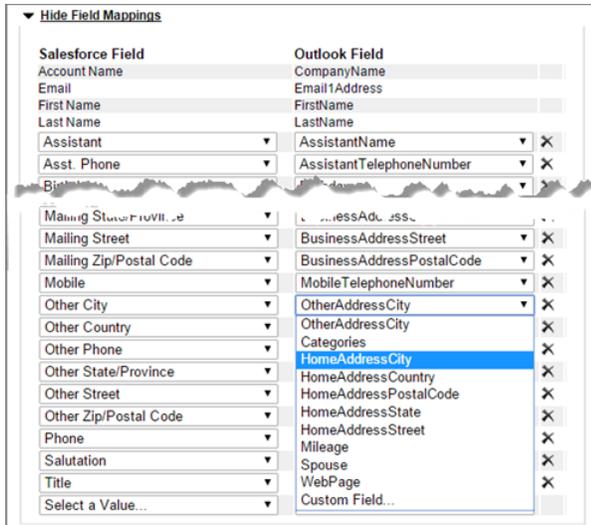
Sync Outlook Home Addresses to Your Salesforce Contacts

Now your users can maintain their contacts' home addresses in both Outlook and Salesforce by updating addresses in just one system.

Salesforce for Outlook syncs these Outlook contact home address fields with Salesforce:

- Street
- City
- State
- Postal Code
- Country

To begin syncing, you or your reps choose which Salesforce contact field to map to each Outlook contact home address field. If you're choosing the fields for your reps, you can define contact field mappings in Outlook configurations in [Setup](#).



If you've indicated that your reps can modify their own field mappings in Outlook configurations, they can define or edit the contact home address field mappings from their Salesforce for Outlook configurations in `Personal Settings`.

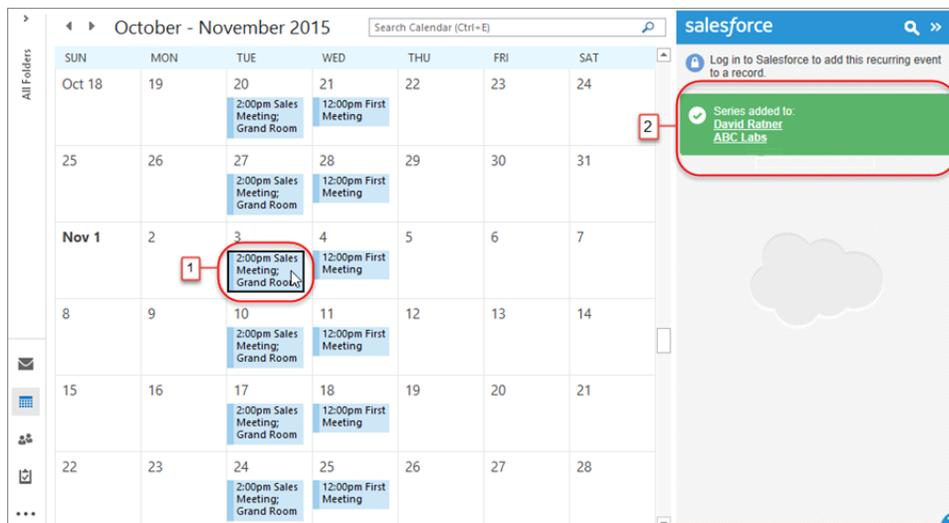
Whether set by you or your reps, home address field mappings begin syncing the next time reps update those contact records in either system.

View Salesforce Records Related to Recurring Events From Outlook

Experience more of Salesforce right from Outlook. Sales reps can now view Salesforce records related to recurring events from the side panel.

After reps relate records to a recurring event series in Salesforce, they can see those related records from the side panel.

To see the related records, select an event from the series in Outlook (1). If that event is syncing with Salesforce, the side panel shows all Salesforce records related to that event (2).



Salesforce App for Outlook Disconnects the Salesforce Side Panel Automatically

Sales reps don't need to juggle multiple Outlook integration products at one time. When reps connect to our latest email integration product, Salesforce App for Outlook, it automatically disconnects the side panel, so your reps encounter one streamlined experience between Salesforce and Outlook.

If your reps connect to Salesforce App for Outlook, they can still download and install Salesforce for Outlook, but only Salesforce App for Outlook can run in Outlook. Reps can, however, take advantage of the Salesforce for Outlook sync feature while still using Salesforce App for Outlook.

Your reps can access the side panel again when you first disconnect the Salesforce App for Outlook for those users in `Setup` and then enable the side panel for those users in Outlook configurations.

You can keep Salesforce App for Outlook enabled for other users at your organization, even if some users prefer to work with the side panel.

Bug Fixes

We also got rid of these pesky bugs.



For	We resolved this issue	Identification number
Sync	Group and Contact Manager Edition users' items synced according to the settings defined in the default Outlook configuration, even when administrators assigned those users to a customized Outlook configuration.	W-2649086
	Sometimes when many items were scheduled to sync in the same sync cycle, some items stopped syncing or never synced. The error log showed the error message "Record mapping missing: No mapping record found for update." The log also showed a message describing the kind of record that didn't sync. For example, if an event didn't sync, the error log showed: "The Outlook event can't find the Salesforce event it was syncing with. Delete and recreate the event to continue syncing it."	W-2711731
Side Panel	Group and Contact Manager Edition users couldn't add attachments to Salesforce records.	W-2658481
	When users viewed cases they located using side panel search, the <code>Case Number</code> field wasn't shown.	W-2617320
	Sometimes when users expanded or collapsed the side panel, it wouldn't display correctly, and users couldn't access its features.	W-2690909
Outlook Compatibility	Sometimes when users created a new email or replied to an email in Outlook while Salesforce for Outlook was open, users couldn't send the email and the compose window wouldn't close.	W-2458980

For	We resolved this issue	Identification number
Send and Add	After users added an Outlook email to Salesforce with the <code>Send</code> and <code>Add</code> button, the "Added to Salesforce" category wasn't added to the sent email in Outlook.	W-2656368

Salesforce for Outlook v2.8.1

For Salesforce for Outlook v2.8.1, we've improved syncing and fixed issues with the side panel and error log.

For	We resolved this issue	Identification number
Sync	Sometimes some items didn't sync between Salesforce and Outlook. The error log showed the message "Salesforce change count does not match Outlook change count."	W-2659429
	Sometimes when users converted an event to an event series in Outlook, sync to Salesforce failed. The error log showed the message, "Single events cannot have detail commands."	W-2648305
	When users converted a task series to a task in Outlook, sync to Salesforce failed. The error log showed the message, "DML operations cannot be performed on recurrent tasks."	W-2645356
	Sometimes when users created or updated an Outlook event series that was marked to end after a certain number of occurrences, sync to Salesforce failed.	W-2609108
	Sometimes when users updated an Outlook event series with a start date in the past and an end date in the future, sync to Salesforce failed.	W-2608933
	Sometimes when users marked tasks as completed in Outlook, Salesforce for Outlook deleted the task in Salesforce.	W-2456435
Side Panel	Sometimes users were asked to upgrade to a supported version of Microsoft® Internet Explorer®, even when users were already working from a supported version.	W-2646207
	When users added emails to person accounts from the side panel, the side panel activity history didn't show the addition.	W-2619605
	Sometimes when users attempted to selectively add an Outlook attachment to Salesforce, it wasn't added. The error log showed the message "Failed to process attachment click event: Object doesn't support property or method 'substring.'".	W-2543481
Error Log	Sometimes the error log showed the message "An entry with the same key already exists." However, Salesforce for Outlook had already managed the error, and no action from the user was necessary.	W-2642572

Salesforce for Outlook v2.8.0

Give your sales professionals a streamlined Salesforce for Outlook experience with features that give you more control with setup, so users can be more focused on selling. Manage how you'd like to install Salesforce for Outlook on your users' workstations and decide how users sync their Microsoft® Outlook® items to Salesforce.

EDITIONS

Available in all editions

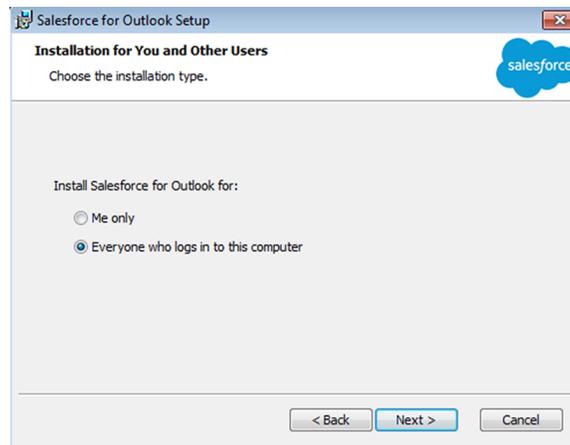
Before we share the latest enhancements, we urge you to upgrade any team members still working with Connect for Outlook to Salesforce for Outlook or Email Connect (Beta). That way, you'll avoid the rush of migrating your teams before Connect for Outlook's retirement in Winter '16. At that time, Salesforce ends support for the feature, and Connect for Outlook will no longer sync contacts, events, and tasks with Salesforce.

Now let's take a look at the latest enhancements to Salesforce for Outlook.

Feature	This means that	Learn about it in
More installation options	Users decide whether they'd like to install Salesforce for Outlook for all users who share that computer, or just for the current user. Or, you decide, when you package and push installation for all users with the .msi installer.	Install for Either One User or All Users Sharing a Computer
Users have more clarity on how their Outlook items are syncing to Salesforce	The names and descriptions of users' sync settings have been updated to better describe to users how their Microsoft® Outlook® contacts, events, and tasks are syncing with Salesforce.	We've Made Sync Settings Easier for Users to Understand
Choose users' default sync setting and prevent users from changing it	You can choose whether users' default sync setting is to sync all Outlook items to Salesforce, or only the Outlook items users select. You can also prevent users from changing the default sync setting, if you like.	Choose the Default Sync Setting and Prevent Users from Changing It

Install for Either One User or All Users Sharing a Computer

When users install Salesforce for Outlook v2.8, they're prompted to install it for just themselves or everyone who can log in to their computer.



If your users are already working with earlier versions of Salesforce for Outlook, learn whether they need to uninstall those versions before installing v2.8.

If users are upgrading from	And they're installing v2.8 for	They need to first uninstall the previous version	They can upgrade to v2.8 without uninstalling the previous version	By selecting the installation type
v2.5 or later	Just themselves		✓	Me only

If users are upgrading from	And they're installing v2.8 for	They need to first uninstall the previous version	They can upgrade to v2.8 without uninstalling the previous version	By selecting the installation type
	Everyone who can log in to their computer	✓		Everyone who logs in to this computer
v2.4.2 or earlier	Just themselves	✓		Me only
	Everyone who can log in to their computer		✓	Everyone who logs in to this computer

Specify the Installation Type for Using the .msi Installer

Important: Before you upgrade users, you may need to uninstall their earlier versions based on our upgrade specifications. Otherwise, you risk some users having two installations on their systems.

By default, the .msi installer installs v2.8 for everyone who can log in to that computer. But if you want to change that default so that v2.8 installs for just individual users, you need to install using this command line.

```
msiexec /i SalesforceForOutlook.msi /log SalesforceForOutlook.log /quiet
MSIINSTALLPERUSER=1
```

We've Made Sync Settings Easier for Users to Understand

In users' Salesforce for Outlook settings, we've renamed two key settings to help your users sync their Outlook items with less support from you. `Automatic` is now `Sync All Outlook Items` and `Manual` is now `Sync Only the Outlook Items I Select`.

Users are prompted to review their sync settings when they install, upgrade, or check their settings from their Microsoft® Windows® system tray by right-clicking the Salesforce for Outlook logo (🔌), and then clicking **Settings**. These sync settings let users choose how their Microsoft® Outlook® items sync to Salesforce.

`Sync All Outlook Items` creates the category `Don't Sync with Salesforce` for the user in Outlook. Users can add the category to individual Outlook items to prevent items from syncing to Salesforce. Otherwise, Salesforce for Outlook automatically syncs all Outlook items that fall within the sync settings you set up in Outlook configurations.

`Sync Only the Outlook Items I Select` creates the category `Sync with Salesforce` for the user in Outlook. Users can add the category to individual Outlook items to sync those items to Salesforce.

Both users who upgrade to Salesforce for Outlook v2.8. and users working in earlier versions of Salesforce for Outlook will see these new setting names.

Choose the Default Sync Setting and Prevent Users from Changing It

We've added two preferences that give you greater control over how users sync their Microsoft® Outlook® items to Salesforce.

When users install or upgrade, `Sync Only the Outlook Items I Select` is selected by default in their Salesforce for Outlook settings.

Now you can change the default sync setting to `Sync All Outlook Items` and prevent users from changing this sync setting later. You'll set these preferences from users' Outlook configurations.

1. In Salesforce Setup, enter `Outlook Configurations` in the `Quick Find` box, then select **Outlook Configurations**.
2. Edit the Outlook configuration for which you want users to change the default setting.
3. Select `Set default sync setting to Sync All Outlook Items`.
4. Select `Don't let users change their sync setting` to prevent users from changing their default setting. Note that even when `Overwrite configuration changes made by users` is selected, users still can change their default sync setting.
5. Click **Save**.

Note that users' Salesforce for Outlook sync setting reverts to the default every time users upgrade. If you continue letting users change their sync setting, alert upgrading users that they must set their preferred sync setting after every upgrade.

Bug Fixes

We also got rid of these pesky bugs.



For	We resolved this issue	Identification number
Sync	If organizations enabled person accounts, Salesforce for Outlook couldn't sync contacts that had a populated Company field.	W-2453824
Salesforce Side Panel	When users attempted to save attachments that exceeded the maximum file size limit to Salesforce, the error message did not explain why.	W-2455577
Sync	If users created an Outlook event by copying an existing Outlook event that was already syncing to Salesforce, both Outlook events would sync to the original Salesforce event.	W-2487059
Delete	Users couldn't delete Outlook events that were opened from the Salesforce for Outlook error log.	W-2492039
Performance	For some users, the Salesforce Side Panel would cause Outlook to freeze when connectivity to Microsoft Exchange was limited.	W-2497739
Salesforce Side Panel	When users added emails to Salesforce between 8 and 11:59 PM EDT/EST, Salesforce for Outlook recorded the task Due Date in Salesforce as a day later than the actual task due date.	W-2397404
Sync	The recurring tasks setting would clear and recurring tasks would stop syncing when administrators edited Outlook configurations.	W-2399213
Sync	Contacts sync would time out for organizations with a large number of contacts.	W-2450695
Sync	If events were set to sync bidirectionally, users couldn't update the End Date of their recurring events in Salesforce.	W-2474847

For	We resolved this issue	Identification number
Salesforce Side Panel	Sometimes the Salesforce Side Panel Publisher menu dropdown did not appear when users clicked on it.	W-2493520
Salesforce Side Panel	The ENTER key didn't work in Salesforce Side Panel Search.	W-2498025
Outlook Configurations	Group and Contact Manager users couldn't see changes that administrators made to users' Outlook configurations.	W-2511007
Salesforce Side Panel	When users saved an email with attachments to Salesforce and then created a new record from the Side Panel Publisher, the attachment view remained in the Side Panel.	W-2513064
Salesforce Side Panel	Sometimes after users added an event to a Salesforce record, the link to that record was broken in the Side Panel.	W-2515293
Salesforce for Outlook Error Log	When a sync error occurred for a recurring event, the Salesforce for Outlook error log displayed the error's Outlook record ID instead of the error's event subject.	W-2523150
Salesforce Side Panel	When users added attachments with a comma in the file name, the attachments couldn't be added to Salesforce.	W-2534592

Salesforce for Outlook v2.7.1

Learn about the bug fixes we've included in this version of Salesforce for Outlook.

For	We resolved this issue	Identification number
Sync	Sometimes sync timed out before a user's contacts finished syncing.	W-2499508
Installer	First-time users couldn't install Salesforce for Outlook without a renewed signing certificate.	W-2500841

Salesforce for Outlook v2.7.0

Get your sales teams on the path to higher productivity with features that help sales professionals better manage tasks and track the emails they add to Salesforce records.

Before we share with you the latest enhancements, we urge you to upgrade any team members still working with Connect for Outlook to Salesforce for Outlook now instead of later. That way, you avoid the rush of migrating your teams well before our planned end-of-support date tentatively scheduled for October 2015. Another reason to expedite this upgrade is that Salesforce for Outlook usability and features are superior compared with the Connect for Outlook usability and features. Specifically, upgrading to Salesforce for Outlook gives your sales teams:

- The Salesforce Side Panel, the feature that brings Salesforce content and functions to sales professionals—directly in Microsoft® Outlook®
- Support for Microsoft Exchange Online—the Microsoft-hosted service that integrates with Office 365™
- Support for Microsoft Outlook 2013 installed using Click-to-Run (a streaming installer for Microsoft Office)
- Options to sync some or all contacts, events, and tasks

EDITIONS

Available in: Salesforce Classic

Available in all editions

- Automatically scheduled sync cycles

Now we're ready to take a look at our enhancements to Salesforce for Outlook and the side panel.

Feature	This means that	Learn about it in
Sync recurring tasks	You can now update your Outlook configurations to sync recurring tasks. Any Outlook configurations you create going forward include, by default, recurring tasks when you set tasks to sync.	Sync Recurring Salesforce Tasks to Microsoft® Outlook®
Get better chances of seeing relevant contacts and leads in the side panel	When users select an email in Outlook, the likelihood of the side panel displaying Salesforce contacts and leads is greater, because we now match Outlook email addresses to all email address fields for contacts and leads in Salesforce.	Increase Your Teams' Chances of Seeing Relevant Contacts and Leads in the Side Panel
Add emails to person accounts based on your teams' preferences	To help sales teams accurately track the emails they add to person accounts, you can now specify whether team members add emails to person accounts as: <ul style="list-style-type: none"> • Accounts in the tasks' <code>Related To</code> field • Contacts in the tasks' <code>Name</code> field 	Sales Teams Can Add Emails to Person Accounts Based on the Teams' Preferences
Add emails to multiple Salesforce records that accept tasks	Now users aren't limited to adding emails to only one Salesforce record that accepts tasks—like accounts, opportunities, and cases.	Add Emails to Multiple Salesforce Records That Accept Tasks

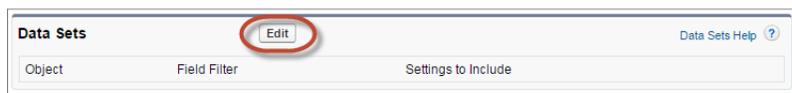
Sync Recurring Salesforce Tasks to Microsoft® Outlook®

Get your sales teams tracking their recurring Salesforce tasks in Outlook. That way, if your sales teams spend lots of time in Outlook, they won't forget about the Salesforce tasks they need to complete on a regular basis.

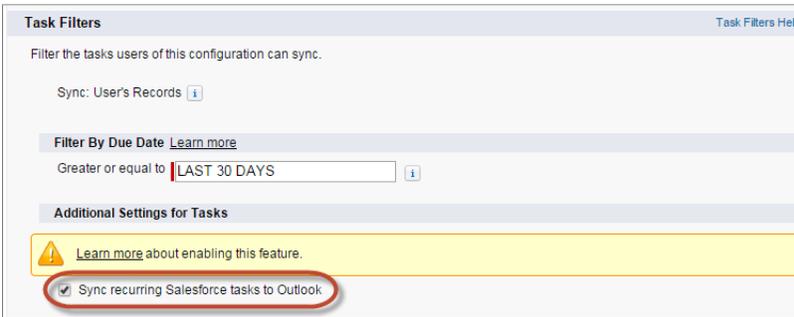
Salesforce for Outlook can now sync recurring Salesforce tasks one way from Salesforce to Outlook. When you set up data sets in your Outlook configurations to sync recurring tasks, your users see only the current open task in the series, as well as any modified tasks. After your users complete the current open task, the next task in the series appears.

Get your sales teams syncing their Salesforce tasks to Outlook now.

1. In Salesforce Setup, enter *Outlook Configurations* in the `Quick Find` box, then select **Outlook Configurations**.
2. Select the Outlook configuration for which you want to set recurring Salesforce tasks to sync.
3. For the data set on the Outlook configuration detail page, click **Edit**.



4. Select the option `Sync recurring Salesforce tasks to Outlook`.



New Outlook configurations and data sets, by default, are set to sync recurring Salesforce tasks to Outlook.

Increase Your Teams' Chances of Seeing Relevant Contacts and Leads in the Side Panel

Sales teams get better email address matching between the email addresses in their Outlook emails and the ones in all email fields for their Salesforce contacts and leads.

Now, the side panel matches email addresses in Outlook emails to all email address fields for contacts and leads in Salesforce—even custom ones, which means the side panel has better chances of finding relevant contacts and leads related to the emails that matter to your sales teams.

Sales Teams Can Add Emails to Person Accounts Based on the Teams' Preferences

Ensure your sales teams add emails to person accounts the way your teams want—as either contacts or accounts, which helps sales teams track emails added to person accounts the way these folks expect.

By default, the side panel adds emails to person accounts as contacts. But it's easy to set your Outlook configurations so that the side panel adds emails to person accounts as accounts instead.

1. In Salesforce Setup, enter *Outlook Configurations* in the **Quick Find** box, then select **Outlook Configurations**.
2. Edit the Outlook configuration for which you want your teams to add emails to person accounts as accounts.
3. Select the option *Add emails to person accounts as accounts*.

Add Emails to Multiple Salesforce Records That Accept Tasks

Help your sales teams add emails to multiple Salesforce records that accept tasks, like accounts, opportunities, and cases—not just contacts. This means that your sales teams are no longer limited to adding emails to only one record that accepts tasks.

Salesforce creates separate tasks for each record to which users add emails. To get this feature, just contact Salesforce Customer Support.

Bug Fixes

We also got rid of these pesky bugs.



For	We resolved this issue	Identification number
Installer	The installer sometimes displayed an error "Could not write value to key...", which prevented users from running Salesforce for Outlook.	W-2410418

Salesforce for Outlook v2.6.2

Learn about the bug fixes we've included in this version of Salesforce for Outlook.

For	We resolved this issue	Identification number
Salesforce Side Panel	The side panel searched for contacts and leads using fewer email addresses than normal, which sometimes caused the side panel to not display as many contacts and leads as possible.	W-2403604
Installer	<p>In some cases when installing Salesforce for Outlook using the .exe installer, users didn't receive a prompt for installing Primary Interop Assemblies, which is a requirement for Outlook 2013.</p> <p>Salesforce incorrectly identified a Remote Desktop Connection protocol as a Terminal Services connection.</p>	<p>W-2428546</p> <p>W-2400489</p>

Salesforce for Outlook v2.6.1

You'll discover new Salesforce Side Panel features to help your users get more Salesforce work done directly from Microsoft® Outlook®. We've also improved setup so you can help new users hit the ground running quickly, and added helpful customizations in Outlook configurations to keep you in control.

Before we dive into our latest features, it's a good time to consider migrating any remaining folks using Connect for Outlook to Salesforce for Outlook, because in addition to including Connect for Outlook features your users know, Salesforce for Outlook includes:

- Support for Microsoft® Exchange Online, the Microsoft -hosted service that integrates with Office 365™
- The Salesforce Side Panel
- Options to sync only some or all Microsoft® Outlook® contacts, events, and tasks
- Automatically scheduled sync cycles

Now let's take a look at our latest enhancements to Salesforce for Outlook and the side panel.

Feature	This means that	Learn about it in
It's easier to set up side panel users to add Outlook items to Salesforce records	Add Email is enabled in new Outlook configurations by default, and new users no longer need to set up My Email to Salesforce to add Outlook emails and attachments to Salesforce records.	It's Easier to Set up Side Panel Users to Add Outlook Items to Salesforce Records
Side panel users can select the email attachments they want to add to Salesforce records	If side panel users add emails with multiple attachments to Salesforce records, users no longer have to save all email attachments along with the email.	Let Users Select Specific Email Attachments to Add to Salesforce
Specify your users' Outlook sync folders	You can standardize Outlook sync folder setup across your company when you choose specific sync folders for your users.	Specify Your Users' Outlook Sync Folders
Salesforce side panel is available from Outlook Tasks	Users can see the side panel from the Outlook Tasks, and add Outlook tasks to Salesforce records.	Side Panel Users Can Do More with Outlook Tasks

EDITIONS

Available in: Salesforce Classic

Salesforce for Outlook Side Panel available in: **All Editions**

Outlook configurations available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

USER PERMISSIONS

To edit users' Outlook configurations in Professional, Enterprise, Performance, Unlimited, and Developer Editions:

- "Customize Application"

To create, edit, or delete Outlook configurations in Professional, Enterprise, Performance, Unlimited, and Developer Editions:

- "Manage Email Client Configurations"

It's Easier to Set up Side Panel Users to Add Outlook Items to Salesforce Records

We've enabled Add Email by default in Outlook configurations, and removed the need for side panel users to set up My Email to Salesforce to add Outlook emails and attachments to Salesforce records.

These changes mean your side panel users can start adding emails, attachments, events, and tasks to their Salesforce records as soon as you add them to an Outlook configuration, and users aren't required to take additional setup steps.

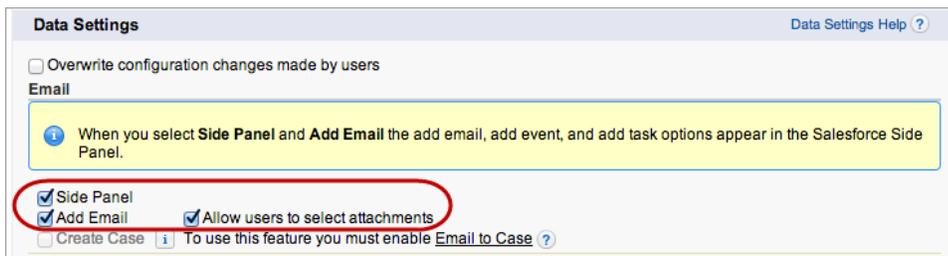
Users you haven't set up to use the side panel are still required to set up My Email to Salesforce to add Outlook emails and attachments to Salesforce records from the **Add Emails** button in the Salesforce section of the Outlook ribbon.

You can disable these features for users. From Setup, enter *Outlook Configurations* in the *Quick Find* box, then select **Outlook Configurations**. Click **New Outlook Configuration**, and then deselect **Add Email**.

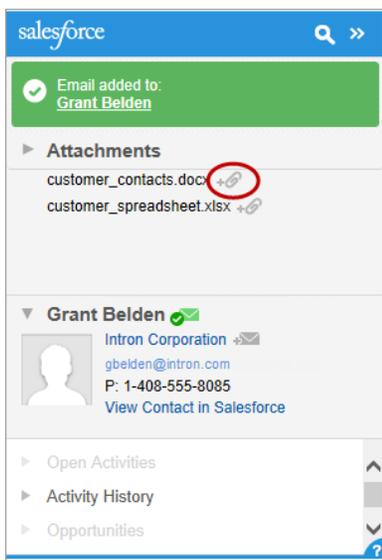
Let Users Select Specific Email Attachments to Add to Salesforce

Reduce your company's data usage in the cloud by letting users add only the attachments that matter to them to Salesforce records.

In Outlook configurations, *Add Email* lets side panel users add emails to Salesforce records, and automatically includes email attachments. Now you can let users add only specific attachments when you enable *Side Panel*, *Add Email*, and *Allow users to select attachments*.



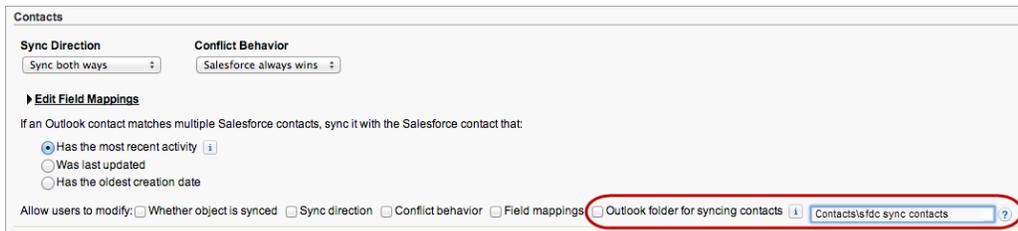
When you enable *Allow users to select attachments* for your users, attachments aren't included automatically when users add an email to a Salesforce record. Instead, users can select specific attachments they want to include when they click  in the side panel next to each attachment.



Specify Your Users' Outlook Sync Folders

Now you can control where your users sync their records by specifying common Outlook sync folders in Outlook configurations. When you specify sync folders, it simplifies users' Salesforce for Outlook setup and keeps sync folders consistent across your company.

The new setting, Outlook folder for syncing contacts, is enabled in new and existing Outlook configurations. This means that by default, users can change their Outlook sync folders. To prevent users from changing their sync folders, open your Outlook configurations and, in the Allow users to modify area, disable the Outlook folder for syncing contacts setting for contacts, events, and tasks. Then, in the text boxes that appear, type the name of the Outlook folders where you want your users' contacts, events, and tasks to sync.

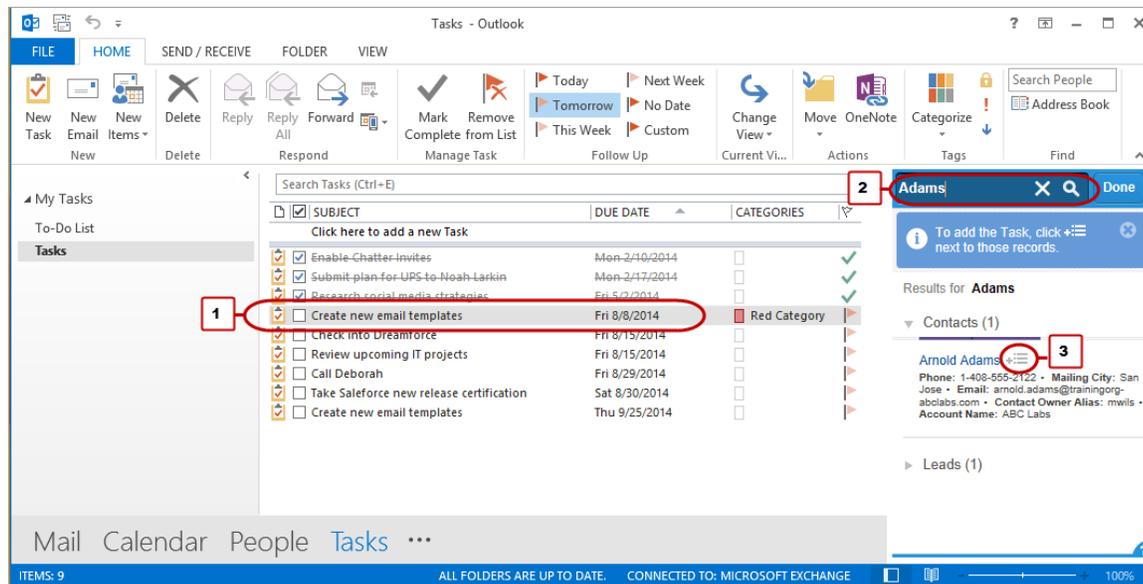


If the folders you specify don't exist in your users' Outlook directories, Salesforce for Outlook creates the folders for them. Your users can then move the contacts, events, and tasks they want to sync to the folders you specified.

Side Panel Users Can Do More with Outlook Tasks

Now users can see the side panel from Outlook Tasks, and add their Outlook tasks to Salesforce records, helping users get more Salesforce work done directly from Microsoft® Outlook®.

Users can add Outlook tasks to multiple Salesforce contacts and to one other record that accepts tasks, like an account, a lead, or an opportunity. To do this from the side panel in Outlook Tasks, users select the task they want to add to a Salesforce record (1), search in the side panel for the record they'd like to add the task to (2), and click  next to the records in the search results (3).



The task is then added to the Salesforce record as an activity, which users can see on the record's Activity History or Open Activities related lists.

If you're using Professional, Enterprise, Performance, Unlimited, or Developer Edition, make sure your Outlook configurations include Add Email and Side Panel to set up users for this feature. If you're using Contact Manager or Group Editions, you don't need to do anything.

Bug Fixes

We also got rid of these pesky bugs.



For	We resolved this issue	Identification number
Salesforce Side Panel	When users created Microsoft® Outlook® emails and used the Send and Add feature to add the emails to custom object records, the side panel displayed the error “We couldn’t add this item. Please try adding this item again.” This problem persisted even when users subsequently tried adding the emails to standard object records.	W-2384788
Sync	When users created events that synced from Outlook to Salesforce, and then later added other attendees, the events for the new attendees didn’t appear in their systems.	W-2369247

Salesforce for Outlook v2.5.1

Learn about the bug fixes we’ve included in this version of Salesforce for Outlook.

For	We resolved this issue	Identification number
Salesforce Side Panel	When users added emails to Salesforce records or used the Send and Add feature for new emails, the side panel sometimes displayed the message “Rate limiting error: TotalRequests Limit exceeded.” Users were unable to add emails to Salesforce records or see available contacts until the Salesforce rate limit automatically reset.	W-2269862
	Sometimes the side panel either displayed as a blank area in Outlook, or the text “ADXServiceCTP” appeared in place of the side panel.	W-2157371
	When users started Salesforce for Outlook, sometimes the side panel showed the “Connecting to Salesforce” message instead of automatically loading the records related to the users’ most recent email. The side panel would not load until users actively selected an email from their Outlook inbox.	W-2157354
Sync	When syncing, Salesforce for Outlook converted recurring event records in Outlook to single event records. This happened only for users who installed Salesforce for Outlook v2.5.0.	W-2294671

Salesforce for Outlook v2.5.0

We're continuing to help users be more productive when they use the Salesforce for Outlook Side Panel. We're also giving you more security control in Salesforce for Outlook.

Before we dive into our latest features, it's a good time to consider migrating any remaining folks in your organization who use Connect for Outlook to Salesforce for Outlook, because in addition to including Connect for Outlook features your users know, Salesforce for Outlook includes:

- Support for Microsoft® Exchange Online—the Microsoft -hosted service that integrates with Office 365™
- The Salesforce Side Panel
- Options to sync only some or all Microsoft® Outlook® contacts, events, and tasks
- Automatically scheduled sync cycles

Take a look at our latest enhancements to Salesforce for Outlook and the side panel.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

Feature	This means that	Learn about it in
Salesforce side panel available in Contact Manager and Group Editions	These users have access to select features like the side panel publisher, adding emails and events to Salesforce records, and more.	Salesforce Side Panel Available in Contact Manager and Group Editions
Create new records directly from the side panel	When users select an email in Microsoft® Outlook®, they can create more kinds of records directly from the side panel.	Create More Kinds of Salesforce Records Directly from the Side Panel
Customize side panel publisher menus for different types of users	Customers using select Salesforce editions can define the kinds of records that groups of users can create from the side panel.	Customize Side Panel Publisher Menus for Different Users
Users can download Salesforce for Outlook without administrative support	Your users can download Salesforce for Outlook and use select features with less administrative support.	Users Can Download Salesforce for Outlook without Administrative Support
Schedule logouts for Salesforce for Outlook	The logouts you schedule through Connected Apps now apply to Salesforce for Outlook.	Schedule Logouts for Salesforce for Outlook with Connected Apps

Requirements for Installing Salesforce for Outlook v2.5.0 and Later

Your users must first uninstall earlier versions of Salesforce for Outlook from the Windows® Control Panel before installing v2.5.0.

If your users' systems don't meet all of the Salesforce for Outlook system requirements, do not upgrade to v2.5.0 or later. Otherwise, your users will not be able to use Salesforce for Outlook or any of its features. For more details, see "Salesforce for Outlook System Requirements" in the Salesforce Help.

For help uninstalling programs from Windows, refer to Microsoft Support, or contact your organization's Windows administrator.

Salesforce Side Panel Available in Contact Manager and Group Editions

Now all Salesforce for Outlook users have access to the side panel.

Contact Manager and Group Editions can now:

- View Salesforce contacts and leads related to their Microsoft® Outlook® emails.
- Create records directly in the side panel with the side panel publisher.
- Add Microsoft® Outlook® emails and events to Salesforce records.

Learn more in “Available Salesforce for Outlook Features by Salesforce Edition” in the Salesforce Help.

Create More Kinds of Salesforce Records Directly from the Side Panel

If your Salesforce for Outlook users generate sales prospects while they’re working in Microsoft® Outlook®, they’ll love that they now can create more kinds of records directly from the side panel using the Salesforce Side Panel Publisher.

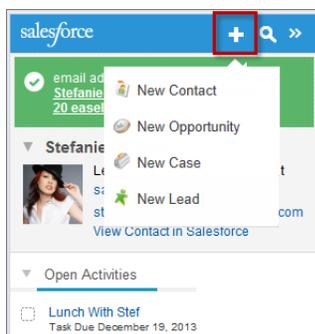
User Permissions Needed

To display the Salesforce Side Panel:	“Side Panel” in Outlook configurations
To create new records from the Salesforce Side Panel:	“Create” and “Read” on all objects that users create records from AND “Visible” on all required fields in records that users create

We’re packing even more functionality into the side panel by making the create case feature even better. We’re introducing the Salesforce Side Panel Publisher, which lets users create not only cases, but also accounts, contacts, leads, opportunities, and custom object records—all directly from the side panel.

Here’s how users create records from the side panel publisher.

1. After selecting an email in Microsoft Outlook®, click **+** and select the type of record that you want to create.



2. Provide details that are relevant to the record.

3. Click **✓** to save the record.

Keep in mind that email attachments aren’t included in the new records.

You must set up the side panel publisher for your users by adding publisher actions to a publisher layout. The process for setting up your users depends on your Salesforce edition. During setup, you can also choose which fields appear on record detail pages in your users’ side panel menus. Those fields can be different from the ones you’ve chosen for record detail pages in Salesforce.

- Contact Manager, Group, or Professional Edition users create *Create a Record* global actions, add them to their Global Publisher Layout, and assign the layout to the appropriate user profile or profiles.
- Enterprise, Performance, Unlimited, or Developer Editions users create *Create a Record* global actions, add them to one or multiple Outlook Side Panel Publisher Layouts, and assign those layouts to the appropriate user profile or profiles.

For more details about the new Outlook Side Panel Publisher Layouts feature, see the next section.

Customize Side Panel Publisher Menus for Different Users

Depending on your Salesforce edition, you can create multiple publisher layouts for the Salesforce Side Panel and customize each layout with different sets of Publisher Actions. This helps users with different responsibilities create different kinds of records directly from the side panel.

Available in: **Enterprise, Performance, Unlimited**, and **Developer** Editions

User Permissions Needed

To display the Salesforce Side Panel:	"Side Panel" in Outlook configurations
To set up global actions:	"Customize Application"
To view side panel publisher layouts:	"View Setup"

For example, you might want your sales managers to be able to create new account, case, contact, and opportunity records from the side panel, but your service reps to be able to create only new case records. You also might want your sales managers to have more fields to complete in the case record detail page than your service reps do.

As administrator, you'll customize side panel publisher menus by:

1. Creating a *Create a Record* global action for each publisher action you want to be available in your users' side panel publisher menus, and adding the appropriate fields for those actions. If you've already set up *Create a Record* global actions to use in other Salesforce features, you don't need to create them for the same kinds of records again—they're already available to add to the side panel publisher.
2. Creating a new Outlook Side Panel Publisher Layout from Setup by entering *Outlook Configurations* in the *Quick Find* box and then selecting **Outlook Configurations**.
3. Editing the new layout to add the publisher actions that you want to be available to a user or a group of users.
4. Assigning the layout to a user profile or profiles that includes the group of users you want to use this publisher layout.

Create additional layouts with different sets of publisher actions for other groups of users.

Users Can Download Salesforce for Outlook without Administrative Support

Now your users can download Salesforce for Outlook and access select features with less work on your part.

Salesforce for Outlook available in: **All** Editions

Outlook Configurations available in: **Professional, Enterprise, Performance, Unlimited**, and **Developer** Editions

User Permissions Needed

To display the Salesforce Side Panel:	"Side Panel" in Outlook configurations
To enable or disable Email to Salesforce:	"Modify All Data"

In the past, you had to grant your users access to download Salesforce for Outlook by creating an Outlook[®] configuration and adding those users to it. Now all Salesforce users automatically have access to download Salesforce for Outlook, and can take advantage of these Salesforce Side Panel features:

- Viewing Salesforce contacts and leads related to emails in users' Outlook Inboxes.
- Viewing Salesforce activities, opportunities, and cases associated to those contacts and leads.

Users who have enabled the My Email to Salesforce feature can also save Outlook[®] emails to Salesforce, and add an email or event to multiple contacts, and to one other record with which you can associate tasks, such as an account, a case, or an opportunity.

If you're using Professional, Enterprise, Performance, Unlimited, or Developer Editions of Salesforce, you can still control the access your users have to Salesforce for Outlook features by editing your Outlook[®] configurations, just as you have in the past. For example, to prevent users from downloading Salesforce for Outlook, add them to an Outlook[®] configuration in which all features are disabled.

To access your Outlook[®] configurations, from Setup, enter *Outlook Configurations* in the **Quick Find** box, then select **Outlook Configurations**.

Schedule Logouts for Salesforce for Outlook with Connected Apps

If your organization is required to comply with a security policy that periodically logs your users out of their applications, you'll love that refresh token expirations you set in Connected Apps now also apply to Salesforce for Outlook.

User Permissions Needed

To display the Salesforce Side Panel:	"Side Panel" in Outlook configurations
To create, update, or delete a Connected App:	"Customize Application" AND either "Modify All Data" OR "Manage Connected Apps"

If you have already scheduled refresh token expirations for your Salesforce application users through Connected Apps, you'll notice that Salesforce for Outlook users are now logged out on the same schedule. Salesforce for Outlook won't run scheduled syncs or allow a user to access Salesforce data from the side panel until the user logs back into Salesforce manually. Users will be prompted to log back in again when a scheduled sync fails or a user tries to use the side panel.

If you haven't set refresh token expirations and you want to, from Setup, enter *Connected Apps* in the **Quick Find** box, then select the option for managing connected apps.

Bug Fixes

We also got rid of these pesky bugs.



For	We resolved this issue	Identification number
Salesforce Side Panel	When users added emails to records other than contacts, and then later tried to choose different records, the side panel generated errors instead of letting users choose the different records.	W-2024264
	For organizations that haven't enabled Shared Activities, the Send and Add feature didn't let users add emails to records other than contacts when users: <ol style="list-style-type: none"> 1. Created an email including recipients. 2. Added the email to a record other than a contact. 3. Added more recipients to the email. 4. Added the email to contacts. 	W-1961640
	On search, side panel displayed incorrect capitalization in records that was inconsistent with the capitalization in the Salesforce version of those records.	W-2032136
	For users to see upgrades from the latest release, they were required to clear their Internet Explorer caches.	W-1955912
	Contacts related to email addresses listed in the To, Cc, and Bcc fields were displayed in the side panel in random order.	W-1939380
	When users opened emails related to Salesforce records for which they didn't have both field-level security and create and read permissions, the side panel appeared blank.	W-2082219 and W-2011896
	The side panel publisher button was displayed even when the side panel publisher wasn't set up for the user.	W-1966827
	In the activity history of a contact display, the icon for email was a completed task icon, instead of an email icon.	W-1803699

Salesforce for Outlook v2.4.2

Learn about the bug fixes we included in this version of Salesforce for Outlook.

For	We resolved this issue	Identification number
Salesforce Side Panel	Salesforce for Outlook didn't populate the Salesforce location field when users added Outlook events to Salesforce records.	W-2089276

For	We resolved this issue	Identification number
	When users added Microsoft® Outlook® emails and events to Salesforce records, certain date formats that users defined in their operating systems caused Salesforce for Outlook to generate errors.	W-2089141
Syncing items	Salesforce for Outlook cleared the record IDs for contacts that users updated in Salesforce and synced to Outlook.	W-2089586
	When users updated details in the comment field of Salesforce tasks, the updates didn't sync to Outlook.	W-2102308

Salesforce for Outlook v2.4.1

Learn about the bug fixes we've included in this version of Salesforce for Outlook.

For	We resolved this issue	Identification number
Salesforce Side Panel	For users who upgraded from Microsoft® Internet Explorer® 8 to a later version, the Create Case Publisher Action sometimes navigated back to the contacts list before users could save the create case form.	W-2034992
The .msi installer	The 64-bit installer generated the error "No cabinet specified for compressed file," which prevented installations from finishing.	W-2019901

Salesforce for Outlook v2.4.0

We're continuing to help users become more productive when they use the Salesforce Side Panel. We're also making efforts to help you better support your users.

Before we get into the enhancements we've included in Salesforce for Outlook, we'd like to encourage any remaining folks using Connect for Outlook to upgrade to Salesforce for Outlook, because in addition to including Connect for Outlook features your users know, Salesforce for Outlook includes features your users will love, like:

- The Salesforce Side Panel
- Support for Microsoft® Exchange Online—the Microsoft-hosted service that integrates with Office 365™
- Support for Microsoft Outlook® 2013 installed using Click-to-Run (a streaming installer for Microsoft Office)
- Options to sync some or all contacts, events, and tasks
- Automatically scheduled sync cycles

Let's now take a look at our latest enhancements to Salesforce for Outlook and the side panel.

EDITIONS

This feature available to manage from: both Salesforce Classic and Lightning Experience

Available in all editions

Feature	This means that	Learn about it in
Create cases directly from the Salesforce Side Panel	When users select an email in Microsoft Outlook, they can create a Salesforce case to keep track of support issues.	Users Can Now Create Cases from the Salesforce Side Panel
Track the versions of Salesforce for Outlook your users run	You can see each user's version of Salesforce for Outlook when you run the Login History report.	You Can Now Track the Versions of Salesforce for Outlook Your Users Run
Receive upgrade notices	Users will see a notice to upgrade to the latest version of Salesforce for Outlook directly in the side panel.	Now Users Know When Upgrades are Available

Users Can Now Create Cases from the Salesforce Side Panel

If your users track customer support issues and gripes with cases they create in Salesforce, they can now create them directly from the side panel.

Available in: **All** Editions

User Permissions Needed

To display the Salesforce Side Panel: "Side Panel" in Outlook configurations

If your Outlook configurations have `Create Case` selected for the original Create Case feature, it's a good idea to familiarize yourself with the differences between that feature, which appears on the Ribbon in Outlook, and the new one in the side panel.

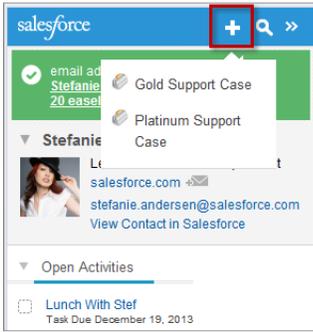
Details	New Create Case Feature	Original Create Case Feature
Includes email attachments		
Uses global create actions		
Simplified setup for administrators		

Before users can create cases from the side panel, make sure you have at least one active create case action set up in Salesforce. All active create case actions appear in the side panel.

If you want to set up a new create case action, you'll do it like this.

1. From Setup, enter *Global Actions* in the *Quick Find* box, then select **Global Actions**.
2. Click **New Action**.
3. Enter the details for the new create case action.
4. Select **Active**, and then save it.

Here's how users can create cases from the side panel.



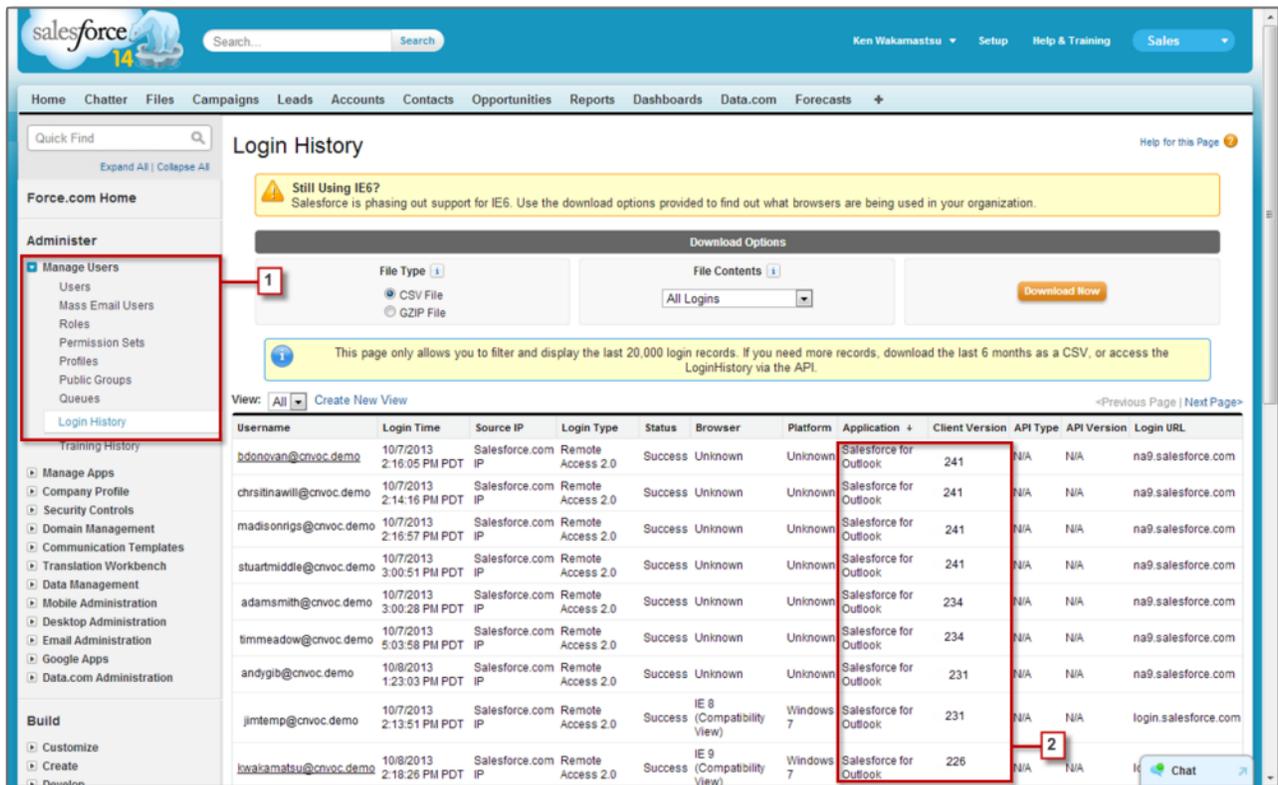
1. After selecting an email in Microsoft Outlook®, click **+** and then a create case action.
2. Type details that are relevant to the case.
3. Click **✓** to save the case. Keep in mind that email attachments aren't included in the created cases.

You Can Now Track the Versions of Salesforce for Outlook Your Users Run

Quickly see which versions of Salesforce for Outlook your users are running from the Login History report.

User Permissions Needed

To run reports: "Run Reports"



1. From Setup, enter *Login History* in the Quick Find box, then select **Login History**.
2. See each user's version of Salesforce for Outlook in the Application and Client Version columns.

Now Users Know When Upgrades are Available

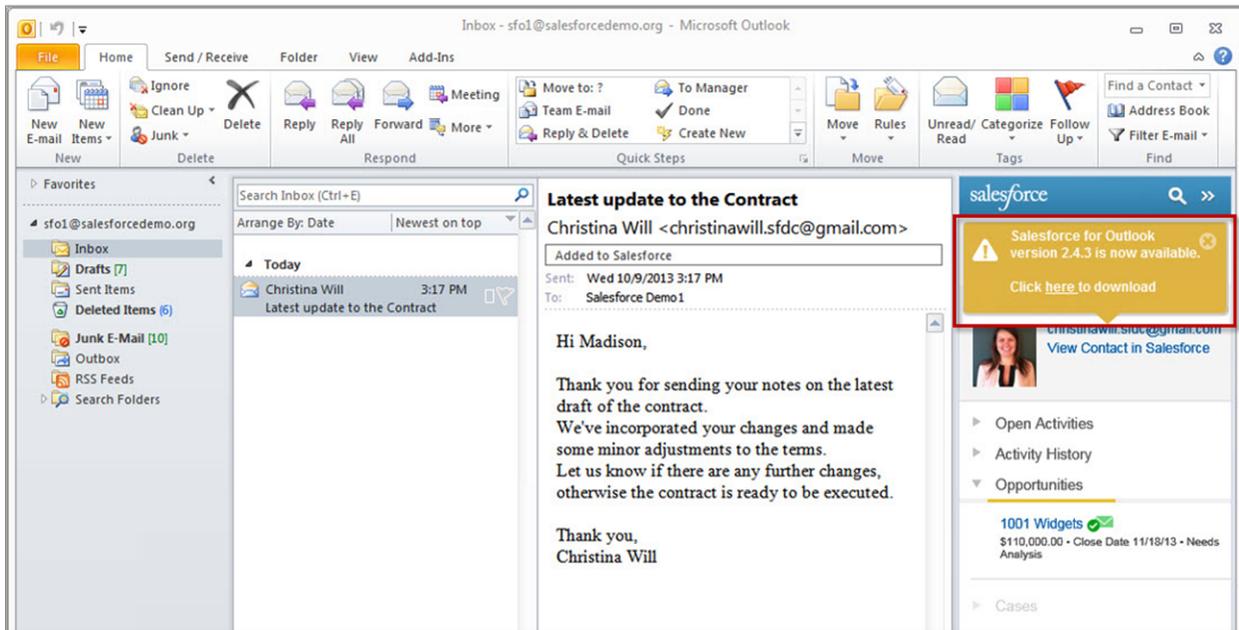
It's easy for users to know when they need to upgrade to the latest version of Salesforce for Outlook. The Salesforce Side Panel notifies users when to upgrade, and includes a link to their Outlook configuration page where they can download the latest version.

Available in: **All Editions**

User Permissions Needed

- | | |
|--|---|
| To display the Salesforce Side Panel: | "Side Panel" in Outlook configurations |
| To notify users when upgrades are available: | "Notify of product updates" in Outlook configurations |

Here's what your users will see.



Side Panel Now Displays Some Search Results Content Differently

When users search for records in the Salesforce Side Panel, and the search results include records with custom field types, specific types of data appear differently. Here are the affected custom type fields.

For a	We displayed in earlier releases	We now display
Check box	An image of a check box	Text for either <i>True</i> or <i>False</i>
Rich text field	An image	The location of the image
Percent figure	A number preceded with the symbol %	Just the number without the symbol %
URL	A hyperlink	Just the text without a hyperlink

Bug Fixes

We also got rid of these pesky bugs.



For	We resolved this issue	Identification number
Installing	For non-English languages, the installation dialog didn't display some symbols correctly.	W-1939050

For	We resolved this issue	Identification number
Salesforce Side Panel	The side panel sometimes didn't display Salesforce contacts that were related to the selected email in Outlook.	W-1915465
	For search results that included currencies, the side panel didn't display the correct currency symbols.	W-1903615
Syncing items	For contacts with birthdays synced from Salesforce to Outlook, birthday events in the Outlook calendar didn't include the contacts' names.	W-1903623

Salesforce for Outlook v2.3.5

Learn about the support and bug fixes we included in this version of Salesforce for Outlook.

Support for Click-to-Run Installations of Microsoft® Outlook® 2013

Salesforce for Outlook supports Outlook installed using Click-to-Run (a streaming installer for Microsoft Office).

Bug Fixes

- For administrators who use the .msi installer to install Salesforce for Outlook, we fixed a bug that prevented the Salesforce Side Panel from displaying for some users. W-1904748
- If users extended a recurring series in Outlook, the next sync cycle incorrectly set the end date for the recurring series in Salesforce. W-1850238

Salesforce for Outlook v2.3.4

Learn about the bug fixes to the Salesforce Side Panel we included in this version of Salesforce for Outlook.

- The Send and Add feature didn't include the body of emails when users added the emails to Salesforce records. W-1893386
- For users' systems that have multiple user accounts, the side panel didn't appear for all users on those machines. W-1779100

Salesforce for Outlook v2.3.3

Learn about the bug fixes we included in this version of Salesforce for Outlook.

For	We resolved this issue	Identification number
Installing	If users installed later versions of the Microsoft® Primary Interop Assemblies (PIA) Redistributable, the Salesforce for Outlook installer required users to install its earlier version, instead.	W-1776082
Single events	For Outlook events with missing ClipStart fields, Salesforce for Outlook didn't include those events for sync cycles.	W-1871463

For	We resolved this issue	Identification number
Recurring events	For some previously synced recurring events, Salesforce for Outlook displayed an error and didn't finish the sync cycle.	W-1849244
	For some Microsoft Exchange configurations, weekday recurring events didn't sync.	W-1818828
	Some modified occurrences didn't sync from Outlook to Salesforce.	W-1849017

Salesforce for Outlook v2.3.2

We've taken a great thing and made it even better. By now, we hope you know about the Salesforce Side Panel—a Salesforce for Outlook feature that helps users view and work with Salesforce records directly in Microsoft® Outlook® 2007, 2010, and 2013. We've made important improvements to the side panel that will further increase your users' productivity.

And if you still have folks in your organization using Connect for Outlook, now's a great time to upgrade them to Salesforce for Outlook, because in addition to including Connect for Outlook features your users know, Salesforce for Outlook includes:

- Support for Microsoft Exchange Online—the Microsoft-hosted service that integrates with Office 365™
- The Salesforce Side Panel
- Options to sync only some or all contacts, events, and tasks
- Automatically scheduled sync cycles

Take a look at our latest enhancements to Salesforce for Outlook and the side panel.

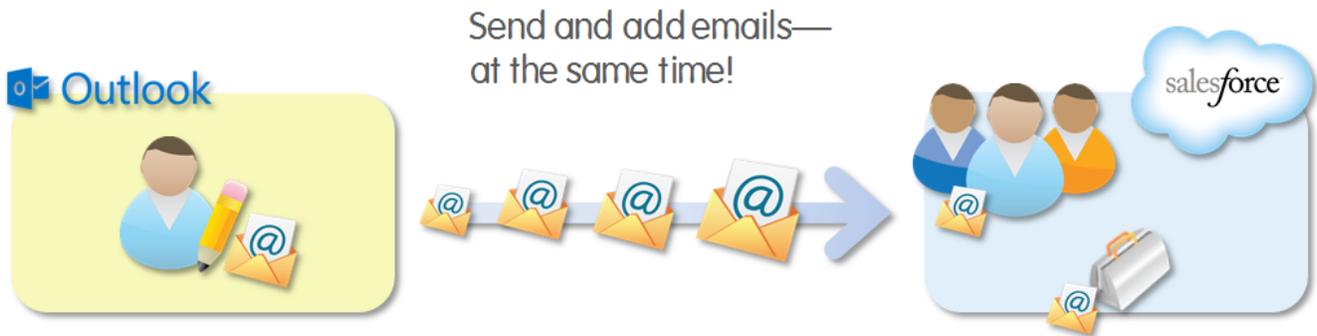
Users can now	This means that	Learn about it in
Send and add emails	When users compose emails in Outlook, the side panel appears in the message. And as users add names in the To , CC , and BCC fields, the side panel displays the related Salesforce contacts, leads, and other records from Salesforce. Then, users can add the new email to the records that appear.	Send and Add Emails
Add Outlook events to Salesforce records	Users can add single, non-recurring events to related Salesforce records—the same way users add emails.	Add Events to Salesforce Records with Event Association
See up to 10 Salesforce contacts and leads at a time	Users can view and work with more Salesforce records in the side panel.	View and Work with More Salesforce Records

Support for Microsoft® Exchange Online

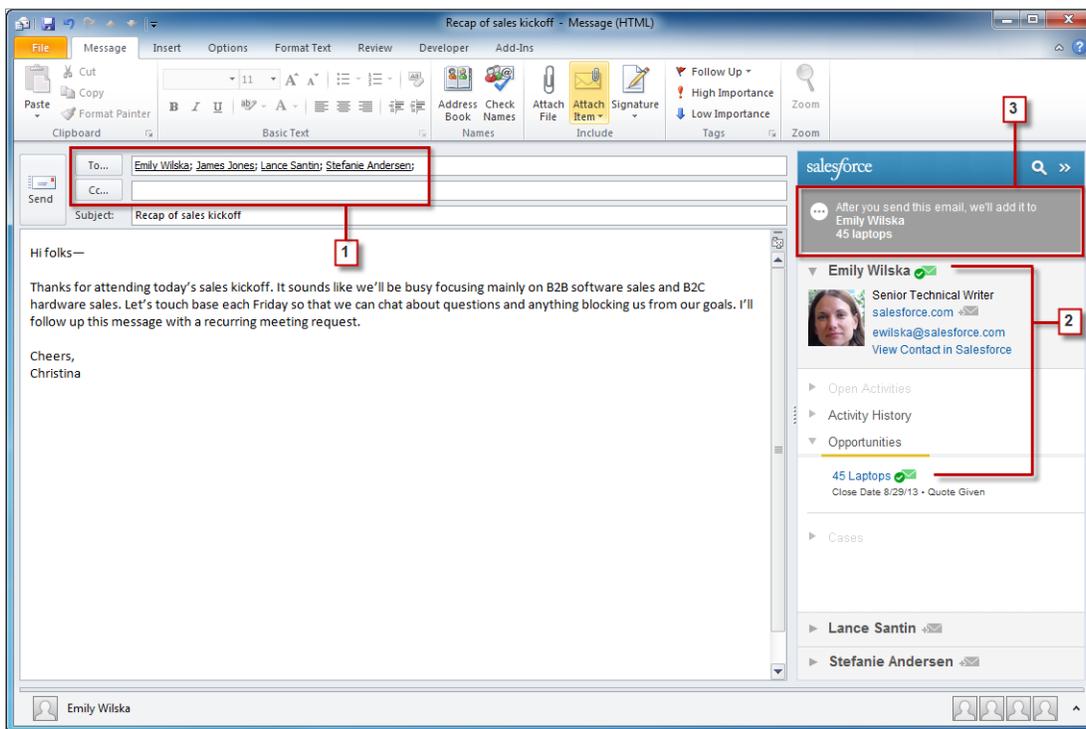
You've been waiting for us to support Exchange Online, and now we do! We support using the desktop versions of Microsoft Outlook 2007, 2010, and 2013 with Exchange Online—the Microsoft-hosted service that integrates with Office 365™. Keep in mind that Salesforce for Outlook doesn't support Outlook installed using Click-to-Run (a streaming installer for Microsoft Office).

Send and Add Emails

We know that users love using the Send and Add feature that's available outside of the side panel. And we know that not having Send and Add available in the side panel was a serious deterrent for users adopting it. But Send and Add in the side panel is here now!



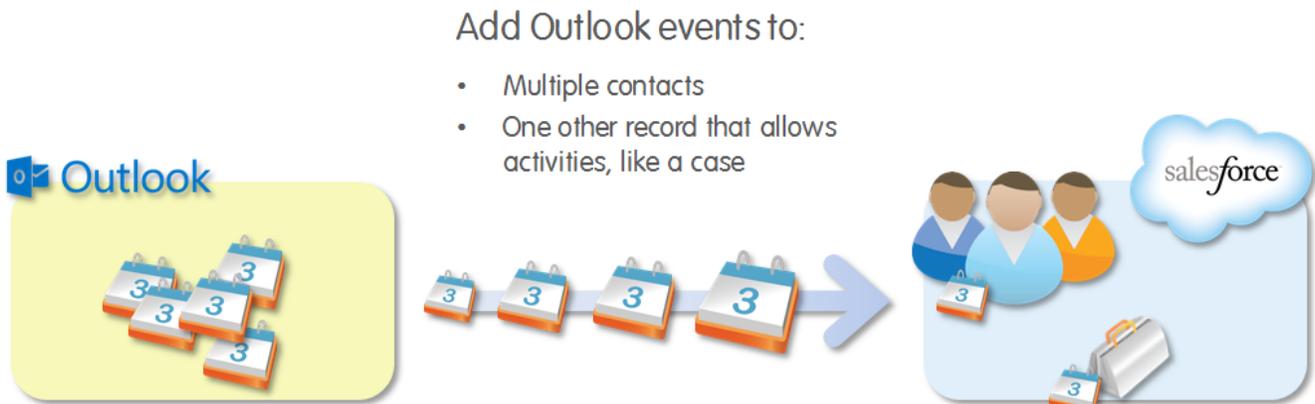
Here's how users can send and add emails at the same time.



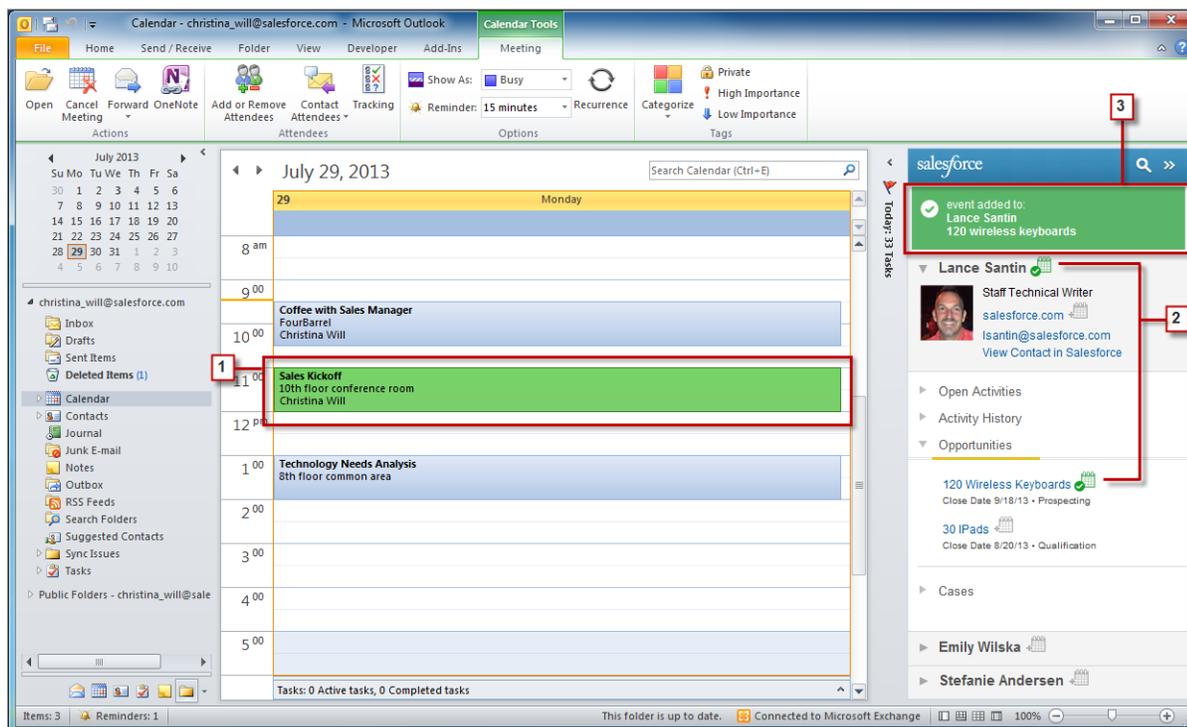
1. Create an Outlook email, and then enter recipients in the **To** field (and if necessary, the **Cc** field). The side panel displays related Salesforce records.
2. Add the email to Salesforce records when you click  next to the records of your choice.
3. Keep track of the records to which you're adding the new email. After you send the email, we'll add it to the Salesforce records.

Add Events to Salesforce Records with Event Association

When users select single, non-recurring events in their Outlook calendars, the side panel displays related contacts and leads—the same way it does for emails. Regardless of whether the events are set to sync with Salesforce, if users add Outlook events to Salesforce records, the side panel triggers a sync to Salesforce calendar for the one event.



Here's how users can add events to Salesforce records.

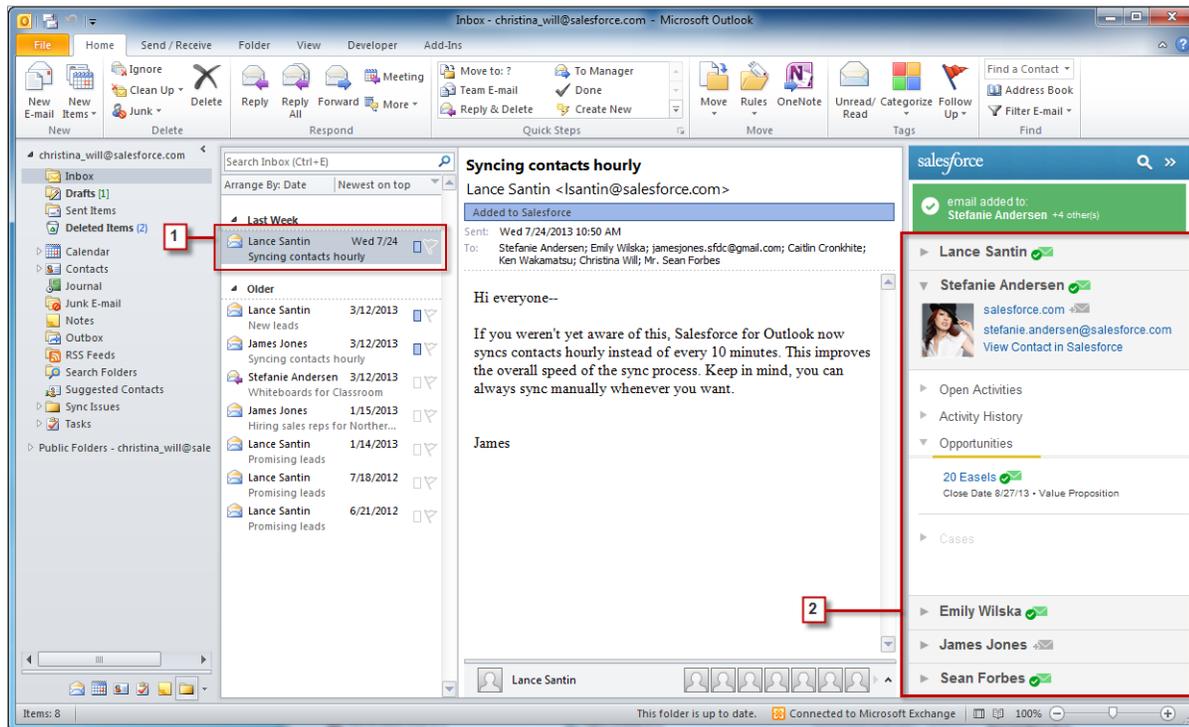


1. In the Outlook calendar, select an event. The side panel displays related Salesforce records.
2. Add the event to Salesforce records when you click  next to the records of your choice.
3. Keep track of the records you've added the event to.

View and Work with More Salesforce Records at a Time

The side panel now displays more contacts and leads for the emails—and now events—that users select in Outlook. Depending on the size of users' Outlook windows and monitors, the side panel displays up to 10 related contacts and leads that fit in the available vertical space. This makes it quicker and easier to add emails and events to more Salesforce records at the same time.

Here's how it works.

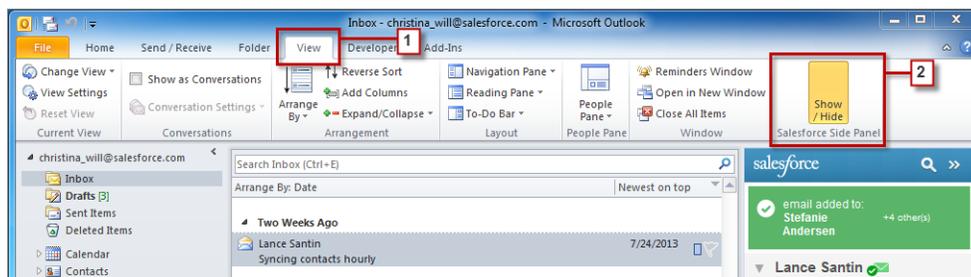


1. Select an Outlook email or event. In this example, the email includes seven recipients, five of whom are already in set up as contacts Salesforce.
2. The side panel displays those five contacts.

Hide and Disable the Salesforce Side Panel

If any of your users want to temporarily hide and disable the Salesforce Side Panel, they'll do so directly in Outlook.

Here's how they'll do it in Outlook 2010 and 2013.



1. Select the View tab.
2. Click **Show / Hide**.

For Outlook 2007, users will click **View > Salesforce Side Panel > Show / Hide**.

Bug Fixes

We also got rid of these pesky bugs.



For	We resolved this issue	Identification number
Installing	After installing Salesforce for Outlook and opening Outlook, the Salesforce for Outlook setup wizard didn't appear. This required users to manually start Salesforce for Outlook and navigate to the setup wizard.	W-1678848
Salesforce Side Panel	When Outlook opened and had an event selected, the side panel didn't display the message <i>No Matching Contacts or Leads in Salesforce</i> .	W-1566793
	If users had a default browser set to anything other than Microsoft Internet Explorer®, and then changed the default to Internet Explorer, links in the side panel opened records in the browser previously set as the default—not in Internet Explorer.	W-1754986
Syncing items	If Salesforce for Outlook encountered Outlook items that included invalid XML code, the sync cycle didn't finish.	W-1756384
	After sync cycles ended, Salesforce for Outlook didn't display the system tray message indicating that the sync process finished.	W-1711272