

Sales Productivity

Salesforce, Summer '18





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SALES PRODUCTIVITY

Salesforce offers a ton of features to increase sales productivity.

Work with Salesforce from Microsoft® or Google Applications

You know you spend tons of time working prospects from your email and scheduling appointments from your calendar. You might also generate mail merges from Microsoft Word to draft letters or labels. After Salesforce admins set up these integration products, you can get your Salesforce work done directly from your Microsoft or Google applications like Microsoft Outlook®, Word, Gmail™, or Google Calendar™.

Einstein Activity Capture

Say goodbye to logging. Say hello to smarter selling. Connect your email and calendar to Salesforce. Then, your emails and events are automatically associated with related account, contact, contract, lead, opportunity, and quote records in Salesforce. Plus, emails sent from Salesforce go through your email account.

Email

Supercharge your productivity with a number of options for sending email right from Salesforce.

Email Templates

Use email templates to increase productivity and ensure consistent messaging. Email templates with merge fields let you quickly send emails that include field data from Salesforce records like contacts, leads, or opportunities. You can use email templates when emailing groups of people—with list email or mass email—or just one person.

Lightning Dialer

Use Lightning Dialer to access telephony features without ever leaving Salesforce. Make and receive calls, add call notes, and log call information with ease. It just takes a single click from phone number fields in Lightning Experience, such as numbers on contacts, leads, and list views.

News

Get instant access to relevant, timely news about customers, partners, competitors, and industries you work with. The News component includes articles from the past 30 days, and is available on business accounts, contacts, leads, and the Home page. News is available from US news sources in English.

Activities: Tasks, Events, and Calendars

Activities include tasks, events, and calendars. With Salesforce, track tasks and meetings together in lists and reports to easily prioritize your time and keep up with your accounts, campaigns, contacts, leads, and opportunities.

Notes

Stay organized and on top of all your deals by adding notes to accounts, contacts, leads, opportunities, and more. With Notes, Salesforce's enhanced note-taking tool, you can use rich text, lists, and images in your notes; relate notes to multiple records; and create notes in Lightning Experience.

Social Accounts, Contacts, and Leads

Increase your users' access to social intelligence and serve customers and prospects better with easy access to social network profiles associated with Salesforce accounts, contacts, and leads. In Salesforce Classic, you can access Twitter and Youtube. In Lightning Experience, you can only access Twitter.

Salesforce to Salesforce

Salesforce to Salesforce makes it easy for businesses using Salesforce to share records and get updated data on shared records. For example, you can share lead and opportunity data with partners. Salesforce to Salesforce lets your business partners easily integrate your data with their Salesforce records. You can see all of your sharing activity, manage your entire pipeline, share data across multi-tiered partnerships, and integrate your business processes with updates received from your partners using workflow and assignment rules.

Work with Salesforce from Microsoft® or Google Applications

You know you spend tons of time working prospects from your email and scheduling appointments from your calendar. You might also generate mail merges from Microsoft Word to draft letters or labels. After Salesforce admins set up these integration products, you can get your Salesforce work done directly from your Microsoft or Google applications like Microsoft Outlook®, Word, Gmail™, or Google Calendar™.

Which Email Integration Product Is Right for My Company?

Salesforce offers several products that let the reps at your company integrate Salesforce with Microsoft® or Google™ email and calendar applications. Before settling on a product, review your options to choose the one that best addresses your reps' needs.

Inbox

Integrate your email and calendar with Salesforce using a suite of productivity features. Einstein Activity Capture logs email messages and events for you. Inbox lets you increase productivity from your email inbox on every message.

Lightning for Outlook

Sales reps spend most of their day in Microsoft[®] Outlook[®]. Isn't it time to use Outlook and Salesforce together? If your teams use Outlook on the web, Outlook 2016, Outlook for Mac 2016, or Outlook 2013, Lightning for Outlook helps them manage their sales more efficiently. Your sales reps can view, edit, and add Salesforce records directly in Outlook, and associate emails and events to Salesforce records.

Lightning Sync

Keep contacts and events in sync between your Microsoft® or Google applications and Salesforce using our cloud-based integration product. What's so great about syncing from the cloud, you ask? Well, it means that to get the job done, you don't have to install or update software manually. It also means that Salesforce admins and IT pros do less work to maintain the feature.

Lightning for Gmail

Get visibility into Salesforce content right where you work, so you can efficiently manage your sales pipeline and close deals faster—directly from Gmail™. Lightning for Gmail—the email integration for Gmail users—gives you a quick view of your sales-related records without making you switch between Salesforce and Gmail.

Gain Speed and Consistency with Email Templates

Whether it's writing to prospects or customers, sales reps craft emails quicker with email templates. In Salesforce, reps can create email templates that address different business needs. When they're ready to send an email, reps pull up the template in their email application pane, and tweak the content as needed. Using templates with Lightning for Outlook or Lightning for Gmail also ensures consistent messaging from your team to your customers.

Email Application Publisher Layouts

Salesforce admins can set up Lightning for Outlook, Lightning for Gmail, or Salesforce for Outlook users to create accounts, cases, leads, opportunities, and even custom objects directly from their email applications. Reps create records using actions menus, which you set up from Salesforce. Your company's Salesforce edition determines how you set up action menus and whether you can customize them.

My Unresolved Items

When you use Salesforce for Outlook, Lightning Sync, or Email to Salesforce to sync items or add emails from your email app to Salesforce, any items that these features can't automatically assign to Salesforce records appear in My Unresolved Items.

Salesforce for Outlook

Sync contacts, events, and tasks between your desktop-based version of Outlook and Salesforce. Select an email in Outlook to see related Salesforce records, like leads, contacts, tasks, and opportunities. And relate that email to the Salesforce records of your choice.

Mail Merge

A mail merge is the process of generating form letters and other Microsoft Word documents that are personalized for the recipient, who is often a contact or lead. The content of each document is predefined in a mail merge template. Mail merge templates include variables called merge fields where data from your Salesforce records—for example a contact's name and address—displays in the generated document.

Which Email Integration Product Is Right for My Company?

Salesforce offers several products that let the reps at your company integrate Salesforce with Microsoft® or Google™ email and calendar applications. Before settling on a product, review your options to choose the one that best addresses your reps' needs.

[] Important: Starting in Winter '19, if you never set up Salesforce for Outlook or your reps aren't regularly working with it, service is no longer available. But don't fret: Our next-generation products, Lightning for Outlook and Lightning Sync, are better than ever and ready to serve you. Check out the Outlook Integration Trail for product details and setup instructions.

Review our recommendations for the email or calendar integration product that best suits your reps.

| For sales reps working with these applications or products | We recommend this Salesforce product | Learn More |
|--|--|---|
| Microsoft® email applications—already integrating with Salesforce using Salesforce for Outlook | Learn about how our cloud-based Microsoft integration products, Lightning for Outlook and Lightning Sync, require less maintenance from your company's IT pros. That's because those features don't require user installation or regular upgrades. If your sales reps meet the system requirements, review our migration considerations to move reps onto the latest and greatest Microsoft integration features right away. | Outlook Integration Considerations for Migrating from Salesforce for Outlook to Lightning for Outlook and Lightning Sync |
| Microsoft email and calendar applications | Learn about Lightning Sync for Microsoft and decide if it's right for your reps. | Outlook IntegrationConsiderations for Sync Directions |
| Google Calendar [™] and Google Contacts | Learn about Lightning Sync for Google and decide if it's right for your reps. | Google Integration Learn About Lightning Sync for Google Features Considerations for Sync Directions |
| Gmail™ | Learn about Lightning for Gmail and decide if it's right for your reps. | Google IntegrationLightning for Gmail Overview |

Considerations for Migrating from Salesforce for Outlook to Lightning for Outlook and Lightning Sync

Before you migrate from Salesforce for Outlook to Lightning for Outlook and Lightning Sync, get up to speed on these sync considerations.

Limitations for Running Lightning for Outlook and Salesforce for Outlook Simultaneously

While you can enable both Lightning for Outlook and the Salesforce for Outlook Side Panel in the same organization, users can't run both Microsoft® integration features at the same time.

How Lightning Sync Manages Sync Conflicts with Salesforce for Outlook

Learn how Salesforce manages sync conflicts when users are assigned to sync the same records for both features.

SEE ALSO:

Lightning Sync Considerations

EDITIONS

Available to manage from: Salesforce Classic and Lightning Experience

Lightning for Outlook available in: **Group**, **Professional, Enterprise**, **Performance, Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

Lightning Sync available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

Salesforce for Outlook available in: **All** Editions except **Essentials** Edition

Limitations for Running Lightning for Outlook and Salesforce for Outlook Simultaneously

While you can enable both Lightning for Outlook and the Salesforce for Outlook Side Panel in the same organization, users can't run both Microsoft[®] integration features at the same time.

To prevent your users from juggling multiple email integration features, Salesforce automatically disconnects the Salesforce for Outlook side panel when users connect to Lightning for Outlook. Folks who use Lightning for Outlook can still download, install, and sync with Salesforce for Outlook, but only Lightning for Outlook can run in Outlook.

SEE ALSO:

Which Email Integration Product Is Right for My Company? How Lightning Sync Manages Sync Conflicts with Salesforce for Outlook

EDITIONS

Available to manage from: Salesforce Classic and Lightning Experience

Lightning for Outlook available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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

How Lightning Sync Manages Sync Conflicts with Salesforce for Outlook

Learn how Salesforce manages sync conflicts when users are assigned to sync the same records for both features.

If you're migrating your users from Salesforce for Outlook to Lightning Sync, we recommend disabling Salesforce for Outlook for your Lightning Sync users.

Though Salesforce manages these conflicts for you, this best practice prevents you from creating complicated sync configurations that could become difficult to manage later.

If you don't disable Salesforce for Outlook for Lightning Sync users, and you've assigned a user to sync the same records with conflicting settings in both an Outlook configuration and a Lightning Sync configuration, Salesforce automatically gives preference to the settings you've set for that kind of record in the Lightning Sync configuration.

Because Salesforce gives preference by record, not by configuration, either or both features could sync your reps Microsoft® items.

EDITIONS

Available to manage from: Salesforce Classic and Lightning Experience

Lightning Sync available in: Professional, Enterprise, Performance, Unlimited, and Developer Editions

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

For example, if a user is assigned to sync contacts, events, and tasks in an Outlook configuration and contacts and events in an Lightning Sync configuration, then the users' tasks would sync with Salesforce for Outlook, and the users' contacts and events would sync with Lightning Sync.

SEE ALSO:

Which Email Integration Product Is Right for My Company?

Limitations for Running Lightning for Outlook and Salesforce for Outlook Simultaneously

Inbox

Integrate your email and calendar with Salesforce using a suite of productivity features. Einstein Activity Capture logs email messages and events for you. Inbox lets you increase productivity from your email inbox on every message.



Note: Some services and subscriptions include this feature for an extra cost. For pricing details, contact your Salesforce account executive.

Inbox Clients

Boost productivity and work smarter right from your inbox. With the Inbox clients, on every email, see relevant Salesforce data, schedule meetings more quickly, and receive intelligent reminders to follow up.

Einstein Activity Capture for Inbox

Say goodbye to logging. Say hello to smarter selling. Connect your email and calendar to Salesforce. Then, your emails and events are automatically associated with related account, contact, contract, lead, opportunity, and quote records in Salesforce. Plus, emails sent from Salesforce go through your email account.

Considerations for Setting Up Inbox

Before setting up Inbox, review how it affects the Assistant, triggers, and validation rules.

Set Up Inbox

Follow the steps in the Inbox Setup Assistant, including installing the Inbox Control Panel, selecting who can use Inbox, and enabling features such as Einstein Activity Capture.

EDITIONS

Available in various user experiences and Salesforce editions, depending on the Inbox feature. For more information, consult each feature.

Inbox Clients

Boost productivity and work smarter right from your inbox. With the Inbox clients, on every email, see relevant Salesforce data, schedule meetings more quickly, and receive intelligent reminders to follow up.

After Inbox is set up for your org, Inbox users can install any or all Inbox clients. During installation, users connect their email and calendar to Salesforce.

List of Inbox Clients

To support common Google[™] and Microsoft[®] email platforms for desktop and mobile devices, we offer several Inbox clients.

Install the Inbox Clients

To use the Inbox clients, you need to install the version that works with your platform and email account.

Work with Salesforce Data in Your Inbox

You don't need to leave your inbox to work with your Salesforce records.

Boost Productivity on Every Email

You already use email to work smarter. Take it to the next level with the Inbox clients.

SEE ALSO:

Considerations for Setting Up Inbox

Set Up Inbox

Inbox

List of Inbox Clients

To support common Google[™] and Microsoft[®] email platforms for desktop and mobile devices, we offer several Inbox clients.

| Inbox Client | Supported Email Accounts |
|--|---|
| Gmail [™] Extension for Chrome [™] | Gmail |
| Add-in for Outlook® | Microsoft Office 365 |
| (Works with Outlook web apps and Outlook 2013 and later) | Microsoft Exchange 2013 and later |
| Standalone Mobile Email App for iOS [™] Devices | Gmail Microsoft Office 365® Microsoft Exchange 2010 and later |
| Standalone Mobile Email App for Android [™] Devices | Gmail Microsoft Office 365 |

EDITIONS

Available in: Salesforce Classic (not available in all orgs), Lightning Experience

Available with Inbox, which is available for an extra cost in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

EDITIO<u>NS</u>

Available in: Salesforce Classic (not available in all orgs), Lightning Experience

| Inbox Client | Supported Email Accounts |
|--------------|-----------------------------------|
| | Microsoft Exchange 2010 and later |

SEE ALSO:

Install the Inbox Clients

Inbox Clients

Install the Inbox Clients

To use the Inbox clients, you need to install the version that works with your platform and email account.

- 1. Download and install the Inbox client for your platform.
 - iOS[™] app
 - Android[™] app
 - Chrome[™] extension
 - Add-in for Outlook[®]
- 2. When prompted during installation, log in to Salesforce.

SEE ALSO:

List of Inbox Clients

Inbox Clients

Work with Salesforce Data in Your Inbox

You don't need to leave your inbox to work with your Salesforce records.

Access Salesforce Data from Your Inbox

There's no need to open a new tab or switch between apps on your mobile device. Inbox seamlessly connects Salesforce data to your email, providing context for all your customer interactions.

How Salesforce Records are Matched to Inbox Records

Salesforce records are matched to Inbox records using specific criteria. Review the criteria to better understand how Inbox works.

Create Salesforce Data from Your Inbox

If you don't see the record you're looking for, you can create new leads, contacts, cases, or opportunities directly. Creating data can only be done with the standalone mobile email apps and the Gmail Extension for Chrome.

See the Tasks for Every Email

Inbox intelligently surfaces relevant Salesforce tasks on every email.

Create Salesforce Tasks From Your Email

It's such a time-saver to create Salesforce tasks without leaving your email app.

EDITIONS

Available in: Salesforce Classic (not available in all orgs), Lightning Experience

Available with Inbox, which is available for an extra cost in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

EDITIONS

Available in: Salesforce Classic (not available in all orgs), Lightning Experience

Share or Hide an Email or Event in Salesforce from Your Inbox

Share or hide the full contents of an individual email or event that's been added to related Salesforce records with Automated Activity Capture.

Keep Track of More by Manually Logging Events

From the standalone mobile email apps, you can easily create events and log them in Salesforce.

Keep Track of More by Manually Logging Emails

From the add-in for Outlook, you can easily log emails to cases, tasks, and other favorite objects in Salesforce.

Get a Quick Overview with Contact Cards

At a glance, you can see all the information about a contact. A contact card is a quick summary of contact information for email participants.

Pin the Outlook Inbox Panel So It's Always Open

If you're using the supported version of Outlook 2016, you can pin the Inbox panel so that it stays open as you move among emails.

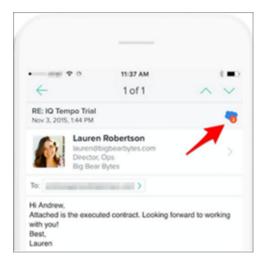
SEE ALSO:

Inbox Clients

Access Salesforce Data from Your Inbox

There's no need to open a new tab or switch between apps on your mobile device. Inbox seamlessly connects Salesforce data to your email, providing context for all your customer interactions.

- 1. Open an email.
- 2. Click .



EDITIONS

Available in: Salesforce Classic (not available in all orgs), Lightning Experience

Available with Inbox, which is available for an extra cost in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

If you have the Salesforce app installed, you can click a record to jump into the details in Salesforce.

3. Click a Salesforce record to see the details.

SEE ALSO:

Create Salesforce Data from Your Inbox Work with Salesforce Data in Your Inbox

How Salesforce Records are Matched to Inbox Records

Salesforce records are matched to Inbox records using specific criteria. Review the criteria to better understand how Inbox works.

| Record | Matching Criteria |
|--------------------|---|
| Contacts and Leads | Match the email address on the email to the contact or lead email address field |
| Accounts | Match the email domain to a Salesforce account record. If any contacts are detected, their accounts are also returned. |
| Opportunities | Match the contact's account and then return opportunities for that account. |
| Case | For any contacts that are matched, their cases are returned. |
| Custom Objects | Match using the:Contact lookup fieldCustom email address fieldAccount lookup field |

EDITIONS

Available in: Salesforce Classic (not available in all orgs), Lightning Experience

Available with Inbox, which is available for an extra cost in: Essentials, Professional, Enterprise, Performance, and **Unlimited** Editions



Example: If one of the email recipients is carl@mycompany.com, we return:

- Account records where the website field is mycompany.com
- Account records for the contacts returned using the matching rules in the table

Create Salesforce Data from Your Inbox

If you don't see the record you're looking for, you can create new leads, contacts, cases, or opportunities directly. Creating data can only be done with the standalone mobile email apps and the Gmail Extension for Chrome

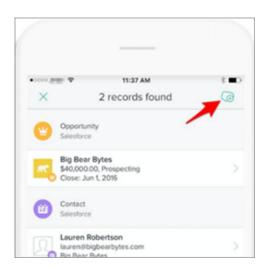
From the Standalone Mobile Email Apps

To create a record, click

EDITIONS

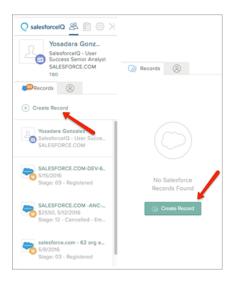
Available in: Salesforce Classic (not available in all orgs), Lightning Experience

Example: For new prospects that reach out to you, create a lead as soon as you receive their message.

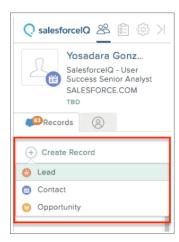


From the Gmail Extension for Chrome

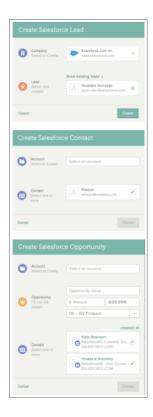
- 1. In your Inbox, either open an email from the person for whom you want to create the record, or hover over the person's name so it appears in the Chrome extension.
- 2. If the Records tab isn't displayed, click the Salesforce cloud icon to open it.
- 3. Click **Create Record**. The button location depends on whether any records exist for the person.



4. Select the type of record you want to create: lead, contact, or opportunity.



5. Fill out the appropriate information when prompted. The information you enter depends on the record type.



6. Click **Create**. The record you just created now appears on the records tab in the Chrome extension.

SEE ALSO:

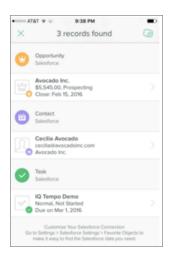
Access Salesforce Data from Your Inbox Work with Salesforce Data in Your Inbox

See the Tasks for Every Email

Inbox intelligently surfaces relevant Salesforce tasks on every email.

From the Standalone Mobile Email Apps

- 1. Open an email.
- 2. Click the **Task** button in the upper-right corner.
- 3. Scroll down to find all the tasks associated with the customers on the email thread.

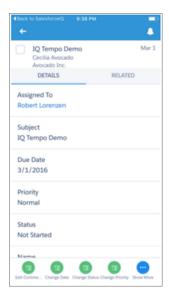


EDITIONS

Available in: Salesforce Classic (not available in all orgs), Lightning Experience

Available with Inbox, which is available for an extra cost in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

4. Click a task to see more details about the task in the Salesforce app and to update the task status.



Note: If you do not see Salesforce Tasks on any of your emails, confirm that Tasks is one of your Favorite Objects. Click the **menu** icon in the upper-left corner. Click **Settings** > **Salesforce Settings** > **Favorite Objects**. Click in the upper-right corner, scroll through the list of favorite objects, and make sure Tasks is selected.

From the Gmail Extension for Chrome

Viewing Salesforce tasks associated with a particular email thread is not supported. However, you can see all your Salesforce tasks from your inbox.

- 1. Click the **Notebook** button in the upper-right corner.
- **2.** Click **Salesforce Tasks** in the upper-right corner.

SEE ALSO:

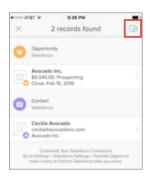
Create Salesforce Tasks From Your Email Work with Salesforce Data in Your Inbox

Create Salesforce Tasks From Your Email

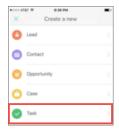
It's such a time-saver to create Salesforce tasks without leaving your email app.

From the Standalone Mobile Email Apps

- 1. Open an email.
- **2.** Click the **Tasks** icon in the upper-right corner.
- **3.** Click the **Outline** icon in the upper-right corner.



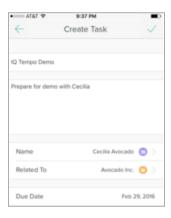
4. Under Create a new, click Task.



5. Fill in all the details: subject, description, associated contact, related record, and due date.

EDITIONS

Available in: Salesforce Classic (not available in all orgs), Lightning Experience



From the Gmail Extension for Chrome

Creating Salesforce tasks from an email is not supported in the Salesforce Inbox desktop app right now.

SEE ALSO:

See the Tasks for Every Email

Work with Salesforce Data in Your Inbox

Share or Hide an Email or Event in Salesforce from Your Inbox

Share or hide the full contents of an individual email or event that's been added to related Salesforce records with Automated Activity Capture.

- Tip: Using your "Sharing Setting for All Emails and Events," you can choose how to share all of your emails and events.
- 1. Open the email.
- **2.** Click the existing sharing setting for the email or event.



3. Select your new sharing setting.

SEE ALSO:

Control How Activities Added by Einstein Activity Capture Are Shared Work with Salesforce Data in Your Inbox

EDITIONS

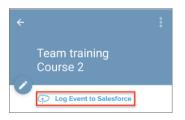
Available in: Salesforce Classic (not available in all orgs), Lightning Experience

Keep Track of More by Manually Logging Events

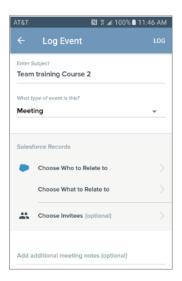
From the standalone mobile email apps, you can easily create events and log them in Salesforce.

For the Standalone Mobile Email App for Android Devices

- 1. Open Inbox.
- **2.** Tap the **Calendar** icon at the bottom of the screen.
- 3. Tap an event.
- 4. Tap Log Event to Salesforce.



- 5. Enter the event details.
 - Subject
 - Event type
 - People to relate the event to
 - Records to relate the event to
 - Invitees (Optional)
 - Additional notes (Optional)



6. Tap Log.

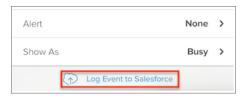
For the Standalone Mobile Email App for iOS Devices

- 1. Open Inbox.
- **2.** Tap the **Calendar** icon at the bottom of the screen.

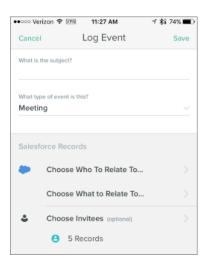
EDITIONS

Available in: Salesforce Classic (not available in all orgs), Lightning Experience

- **3.** Tap an event.
- 4. Tap Log Event to Salesforce.



- **5.** Enter the event details.
 - Subject
 - Event type
 - People to relate the event to
 - Records to relate the event to
 - Invitees (Optional)
 - Additional notes (Optional)



6. Tap Log.

SEE ALSO:

Work with Salesforce Data in Your Inbox

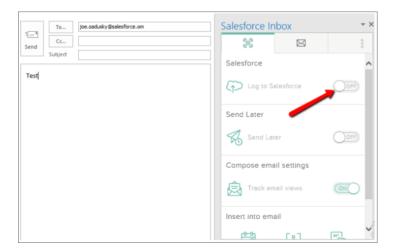
Keep Track of More by Manually Logging Emails

From the add-in for Outlook, you can easily log emails to cases, tasks, and other favorite objects in Salesforce.

- 1. Open Inbox.
- 2. Create a new message.
- **3.** Enter a message recipient and body text.
 - Note: This information is required to log the message to Salesforce.
- **4.** Click **Launch Inbox** in the top toolbar.



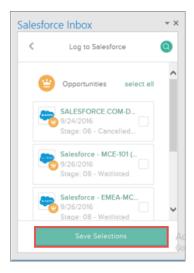
5. To the right of the compose screen, switch **Log to Salesforce** to On.



6. Check the boxes for the records (Opportunities, Contacts) to which you want to log the email.

EDITIONS

Available in: Salesforce Classic (not available in all orgs), Lightning Experience



7. Click Save Selections.

Get a Quick Overview with Contact Cards

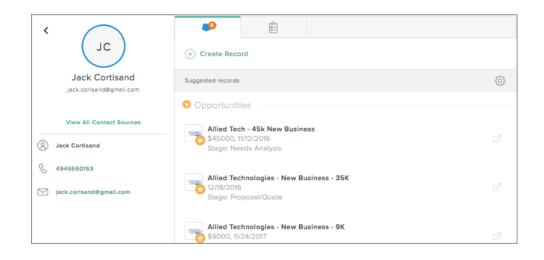
At a glance, you can see all the information about a contact. A contact card is a quick summary of contact information for email participants.

If a contact record doesn't exist in Salesforce, information for the Contact card doesn't generate. Instead, create a contact.

From the Add-in for Outlook

View contact cards on the **Profile** tab.

- Select **View All Contact Sources** to expand the view to see all the data sources.
- Open and view a contact's card from your Inbox or Calendar.
 - Hover over an email address.
 This opens the sidebar, which defaults to the **Record** tab.
 - 2. Click to open the **Profile** tab.



EDITIONS

Available in: Salesforce Classic (not available in all orgs), Lightning Experience

From the Standalone Mobile Email Apps

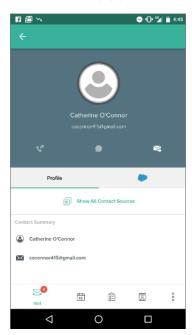
You can open and view a Contact card from any of the following places:

- Inbox—Open an email and click any of the names or addresses in the From, To, or cc lines.
- Calendar—Open an event and click any of the attendees.
- Contact Gallery—On the **Contact** tab, select any attendees that are visible in the agenda view.

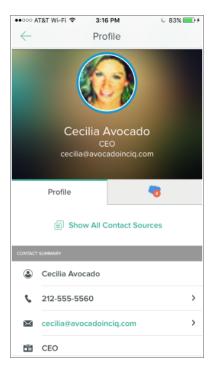
 Alternatively, search for a specific contact and select the contact.

Select **Show All Contact Sources** to expand the view to see all the data sources.





In iOS



From the Gmail Extension for Chrome

View contact cards on the **Profile** tab.

You can:

- Select View All Contact Sources to expand the view to see all the data sources.
- Open and view a Contacts card from any of the following places:
 - Inbox or Calendar—Hover over an email address. This opens the sidebar, which defaults to the **Record** tab. Click to open the **Profile** tab.
 - Google Contacts—From the list of contacts, hover over an email address. This opens the sidebar, which defaults to the **Record** tab. Click to open the **Profile** tab.
- Note: Contact card data comes from various sources.
 - Images are obtained from Gravatar. To change the image, update it in Gravatar. SalesforcelQ caches data, so it could take some time before the image is refreshed.
 - Structured data is obtained from Salesforce, Google or Exchange contacts, parsed signatures, or third-party data. To turn off third-party data, use the Salesforce Inbox Admin Setup screen in Lightning Experience.

SEE ALSO:

Work with Salesforce Data in Your Inbox

Pin the Outlook Inbox Panel So It's Always Open

If you're using the supported version of Outlook 2016, you can pin the Inbox panel so that it stays open as you move among emails.

For users in the Current or Office Insider channels, the pin feature is supported in Outlook 2016 for Windows build 7668.2000 and later.

For users in Deferred channels, the feature is supported in Outlook 2016 for Windows build 7900.xxxx and later.

In addition, the feature is available only if you've installed Outlook 2016 using the click-to-run installer (not MSI). To check your version and installation type, in Outlook, go to **File** > **Office Account**.



EDITIONS

Available in: Salesforce Classic (not available in all orgs), Lightning Experience

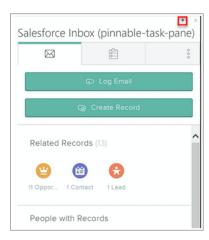
Available with Inbox, which is available for an extra cost in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

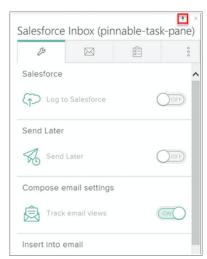
For more details, see What version of Outlook do I have?.

- Note: You must have both a supported version of Outlook and a click-to-run installation to use the pin feature.
- 1. In Outlook 2016, launch Inbox.



2. Click in the upper-right corner of the Inbox panel. The image changes to.





You can pin the Inbox panel from a folder such as your Inbox, or if you are replying to an email. If you are creating an email, however, you can't pin the panel.

Boost Productivity on Every Email

You already use email to work smarter. Take it to the next level with the Inbox clients.

Use Insert Availability to Optimize Scheduling

Finally got a response from that prospect you've been hunting down for weeks? Avoid the back and forth of scheduling a meeting with the insert availability feature. Don't have time to email your availability? Give a teammate calendar access to schedule your meetings. This change applies to Lightning Experience, Inbox for iOS, and Inbox for Android.

Prioritize Your Inbox with Intelligent Notifications

Inbox analyzes your email correspondence to help you stay on top of every deal. Receive an intelligent reminder if you need to follow up on an important email, or get notified when someone opens your email.

Never Lose Touch with Smart Follow-Up Reminders

For an important email, configure a Smart Follow-Up Reminder so you can proactively reach back out to a customer who hasn't responded to your email.

EDITIONS

Available in: Salesforce Classic (not available in all orgs), Lightning Experience

Time Your Emails with Send Later

Working late at night? Use Send Later so your prospect receives your email first thing in the morning or during their lunch break.

Take a Shortcut to Typing Faster Emails

Using the Chrome extension, you can use text shortcuts in any email message you compose in Gmail. Shortcuts same time while improving accuracy, because they give you an easy way to insert text you commonly use into a message.

SEE ALSO:

Inbox Clients

Use Insert Availability to Optimize Scheduling

Finally got a response from that prospect you've been hunting down for weeks? Avoid the back and forth of scheduling a meeting with the insert availability feature. Don't have time to email your availability? Give a teammate calendar access to schedule your meetings. This change applies to Lightning Experience, Inbox for iOS, and Inbox for Android.

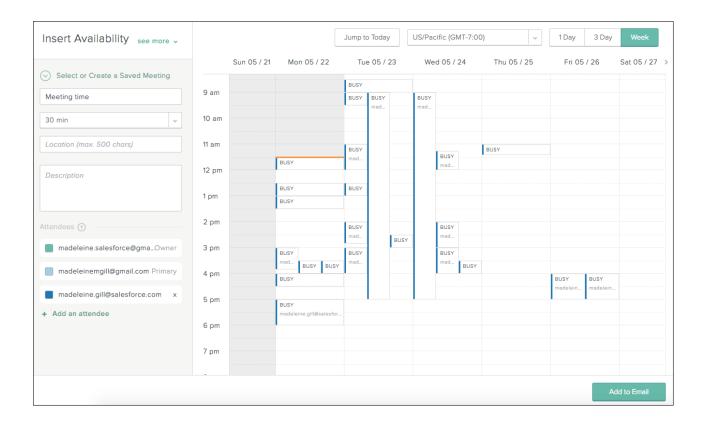
- **1.** Compose an email and add desired recipients
- 2. Click Insert Availability.

EDITIONS

Available in: Lightning Experience, Inbox for iOS, and Inbox for Android

Available for an extra cost with Inbox in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

Available for an extra cost with Sales Cloud Einstein in:**Professional, Enterprise, Performance**, and **Unlimited** Editions



- 3. Select open times from your calendar or times that are open for all other attendees who have shared their calendars with you.
 - You're able to select any time you are open even if others aren't free. Show or hide other calendars by selecting checkboxes in the Attendees list.
 - To schedule a meeting on behalf of someone else, simply change the meeting owner to another person on the meeting. The new meeting owner, who must be a member of your Salesforce org, has control over communications and changes to the invitation.
 - For Microsoft Clients, users must include their teammate's email address in the **To** or **Cc**before clicking on the **Availability**feature to schedule a meeting for them.

After the email is sent, your prospect can click one of your options to immediately book a slot. If your calendar fills up in the meantime, your prospect only sees the times still available.

SEE ALSO:

Boost Productivity on Every Email

Prioritize Your Inbox with Intelligent Notifications

Inbox analyzes your email correspondence to help you stay on top of every deal. Receive an intelligent reminder if you need to follow up on an important email, or get notified when someone opens your email.

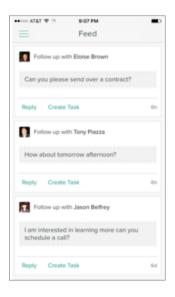
Inbox scans your unread messages and proactively suggests Salesforce tasks for engaged customers. Using natural language processing, Inbox identifies messages from customers that require a response but have not been replied to yet.



Note: Inbox only suggests tasks for customer emails that you have not responded to in a couple of days. If you don't see any suggested tasks, you're up to speed on your email.

From the Standalone Mobile Email Apps

- 1. Open the Feed.
- 2. Scroll down to find a suggested task. The text snippet in the card shows the body of the email that Salesforce Inbox clued in on.



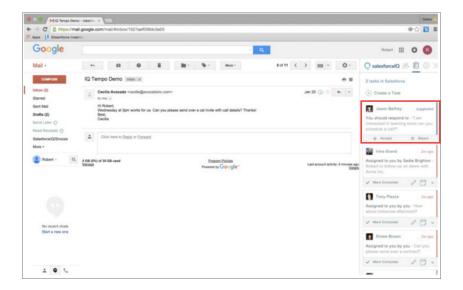
- **3.** Do one of the following:
 - Click **Reply** to respond to the email immediately.
 - Click **Create Task** to save the suggestion as a Salesforce task.

From the Gmail Extension for Chrome

- 1. Click the task list icon in the upper-right corner.
- 2. Scroll down to find a suggested task. The text snippet in the card shows the body of the email that Salesforce Inbox clued in on.

EDITIONS

Available in: Salesforce Classic (not available in all orgs), Lightning Experience



- **3.** Do one of the following:
 - Click **Accept** to save the suggestion as a Salesforce task.
 - Click **Reject** to dismiss the suggestion.

SEE ALSO:

Boost Productivity on Every Email

Never Lose Touch with Smart Follow-Up Reminders

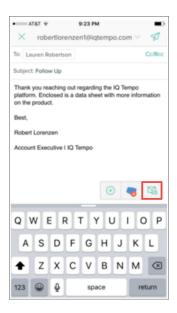
For an important email, configure a Smart Follow-Up Reminder so you can proactively reach back out to a customer who hasn't responded to your email.

From the Standalone Mobile Email Apps

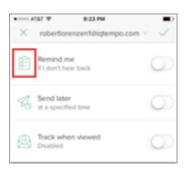
1. When composing an email, click the **Email** button.

EDITIONS

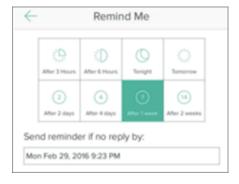
Available in: Salesforce Classic (not available in all orgs), Lightning Experience



2. Click the **Remind me** toggle.



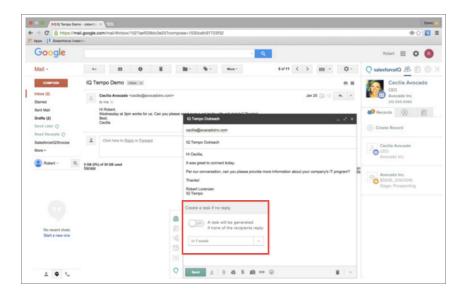
3. Select the **Smart Reminder** interval. This is the amount of time Inbox waits before creating a Salesforce task, if you don't get a reply.



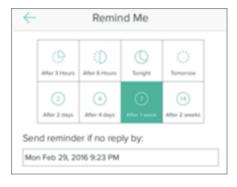
4. Send the email. Inbox automatically creates a Salesforce task if you don't hear back from the person on the email thread.

From the Gmail Extension for Chrome

- 1. When composing an email, click the **Email** button.
- 2. Set Create a task if no reply to On.



3. From the drop-down list, select the **Smart Reminder** interval. This is the amount of time Inbox waits before creating a Salesforce task, if you don't get a reply.



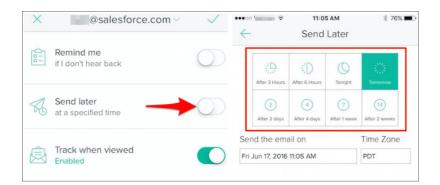
4. Send the email. Inbox automatically creates a Salesforce task if you don't hear back from the person on the email thread.

SEE ALSO:

Boost Productivity on Every Email

Time Your Emails with Send Later

Working late at night? Use Send Later so your prospect receives your email first thing in the morning or during their lunch break.



EDITIONS

Available in: Salesforce Classic (not available in all orgs), Lightning Experience

Available with Inbox, which is available for an extra cost in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

SEE ALSO:

Boost Productivity on Every Email

Take a Shortcut to Typing Faster Emails

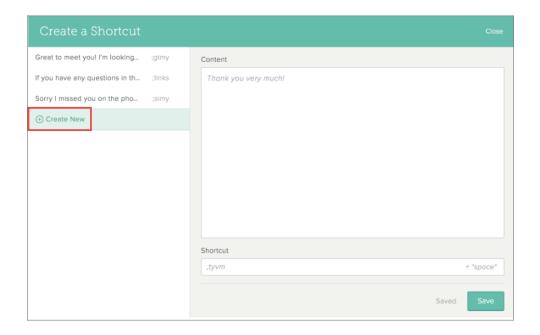
Using the Chrome extension, you can use text shortcuts in any email message you compose in Gmail. Shortcuts same time while improving accuracy, because they give you an easy way to insert text you commonly use into a message.

A few default Shortcuts have been created for you, but you can also create your own.

- **Example:** If your email messages frequently include wording that you will follow up with a prospect by phone, you can use a shortcut to quickly enter that wording in any message. A sales rep might frequently end emails with the phrase "I look forward to our phone call." With a shortcut, it's easy to add the phrase every time.
- 1. In Gmail, click Compose.
- **2.** Click the **semicolon** icon to the left of the compose screen.
- 3. Click Manage your shortcuts.
- **4.** On the left side of the screen that appears, click **Create New** if it isn't already highlighted.

EDITIONS

Available in: Salesforce Classic (not available in all orgs), Lightning Experience



5. In the Content field, enter the text you want to appear when you enter the Shortcut. As you enter the text, the proposed Shortcut characters appear in the Shortcut field. After you save the Shortcut, you can edit these characters.

6. Click **Save**, and then click **Close**.

SEE ALSO:

Boost Productivity on Every Email

Einstein Activity Capture for Inbox

Say goodbye to logging. Say hello to smarter selling. Connect your email and calendar to Salesforce. Then, your emails and events are automatically associated with related account, contact, contract, lead, opportunity, and quote records in Salesforce. Plus, emails sent from Salesforce go through your email account.

For more information, see Einstein Activity Capture.

EDITIONS

Available in: Lightning Experience

Available with Inbox in: **Enterprise**, **Performance**, and **Unlimited** Editions

Considerations for Setting Up Inbox

Before setting up Inbox, review how it affects the Assistant, triggers, and validation rules.

General

- When creating Salesforce records with the Inbox clients, the validation rules, triggers, and required fields from Salesforce are applied.
- It can take up to 24 hours for changes in Salesforce to show up in the Inbox clients.
- If you don't enable Einstein Activity Capture, you can still add records and emails directly to Salesforce with Salesforce Inbox clients.

EDITIONS

Available in various user experiences and Salesforce editions, depending on the Inbox feature. For more information, consult each feature.

• If you enable Einstein Activity Capture with one of the Inbox clients installed, the Inbox client works differently. For example, users can't use the Inbox client to manually log emails to Salesforce. Alternatively, Inbox allows users to share emails with Einstein Activity Capture.

Einstein Activity Capture

- Einstein Activity Capture is not supported in sandbox environments.
- Einstein Activity Capture works with all Saleforce-supported languages.
- The Last Activity Date field on accounts, contacts, leads, opportunities, and person accounts doesn't reflect emails and events that were added to Salesforce with Einstein Activity Capture. Therefore, we recommend that you remove the Last Activity Date field from the page layouts for those objects.
- Custom objects aren't supported. When emails are sent from a custom object, the email is logged on the activity timeline of the associated contact.
- Emails exchanged between a user's internal domain aren't associated with Salesforce records, regardless of the Excluded Addresses settings. For example, if John Smith connects his account john@acme.com to Salesforce, no emails or events to or from john@acme.com are associated with the John Smith contact record in Salesforce.
- Platform encryption isn't supported, so emails and events that are added to Salesforce with Einstein Activity Capture aren't encrypted. If platform encryption is enabled for your org, emails and events associated with Salesforce records don't show the names of encrypted contacts and leads.

SEE ALSO:

Set Up Inbox

Set Up Inbox

Follow the steps in the Inbox Setup Assistant, including installing the Inbox Control Panel, selecting who can use Inbox, and enabling features such as Einstein Activity Capture.

(1) Important: After setting up Inbox, tell Inbox users to install the Inbox clients.

For a quick overview on how to set up and provision Salesforce Inbox, check out these videos.

- Set Up Inbox in Lightning Experience
- Set Up Inbox in Salesforce Classic
- 1. Access the Inbox Setup Assistant

The Setup Assistant is your guide to selecting Inbox users and setting up features.

2. Install the Inbox Control Panel

Manage your sales team's deployment of Inbox clients with the Inbox Control Panel from the AppExchange.

3. Select Who Can Use Inbox

A standard permission set for Inbox is already created for you. Make sure all the permissions you need are enabled, and then assign the permission set to users.

EDITIONS

Available in various user experiences and Salesforce editions, depending on the Inbox feature. For more information, consult each feature.

USER PERMISSIONS

To set up Inbox

 Customize Application and Modify All Data

4. Enable and Configure Inbox Features

Use the Inbox Setup Assistant as your guide for setting up additional features such as Einstein Activity Capture and Read Receipts.

SEE ALSO:

List of Inbox Clients
Install the Inbox Clients
Inbox

Access the Inbox Setup Assistant

The Setup Assistant is your guide to selecting Inbox users and setting up features.

- From Setup, enter Inbox in the Quick Find box, then select Setup Assistant under Inbox.
- 2. Click **Get Started**, if it's your first time visiting the Setup Assistant.

The Inbox Setup Assistant shows the tasks you need to complete to set up Inbox.

SEE ALSO:

Inbox

EDITIONS

Available in various user experiences and Salesforce editions, depending on the Inbox feature. For more information, consult each feature.

USER PERMISSIONS

To access the Inbox Setup Assistant:

 Customize Application and Modify All Data

Install the Inbox Control Panel

Manage your sales team's deployment of Inbox clients with the Inbox Control Panel from the AppExchange.

For a quick overview on how to set up and provision Salesforce Inbox, check out these videos.

- Set Up Inbox in Lightning Experience
- Set Up Inbox in Salesforce Classic
- From Setup, enter Inbox in the Quick Find box, then select Setup Assistant under Inbox.
- **2.** If it's your first time visiting the Inbox Setup Assistant, click **Get Started**. The Inbox Setup Assistant shows all the steps you need for Inbox deployment.
- **3.** To install the Inbox Control Panel, click **Get Package**. (Alternatively, you can directly install the Inbox Control Panel from the AppExchange.)
- 4. During installation, select Install for All Users.

EDITIONS

Available in various user experiences and Salesforce editions, depending on the Inbox feature. For more information, consult each feature.

USER PERMISSIONS

To install the Inbox Control Panel:

 "Customize Application" and "Modify All Data" Sales Productivity Inbox

Select Who Can Use Inbox

A standard permission set for Inbox is already created for you. Make sure all the permissions you need are enabled, and then assign the permission set to users.

For a quick overview on how to set up and provision Salesforce Inbox, check out these videos.

- Set Up Inbox in Lightning Experience
- Set Up Inbox in Salesforce Classic
- (1) Important: If you use Sales Cloud Einstein, Inbox is included in the Sales Cloud Einstein permission set. Follow the steps to assign Sales Cloud Einstein to users.
- 1. From Setup, enter Permission Sets in the Quick Find. Then, select Permission Sets.
- 2. Click one of the Inbox standard permission sets, **Inbox With Einstein Activity Capture** or **Inbox Without Einstein Activity Capture**.

The Inbox With Einstein Activity Capture permission set gives you access to Einstein Activity Capture and the Activities dashboard. The Inbox setup assistant guides you through the steps for setting up Einstein Activity Capture.

3. Click **Manage Assignments** to assign the permission set to users.

SEE ALSO:

Assign Permission Sets to a Single User Assign a Permission Set to Multiple Users Inbox

Enable and Configure Inbox Features

Use the Inbox Setup Assistant as your guide for setting up additional features such as Einstein Activity Capture and Read Receipts.

Set Up Einstein Activity Capture for Inbox

Set up Einstein Activity Capture so that emails and events are automatically associated with related Salesforce records. Sales reps need to connect their email and calendar to Salesforce.

Give Inbox Users Access to the Activities Dashboard

The Activities dashboard provides a summary of sales activities, including the ones added with Einstein Activity Capture. When you use Einstein Activity Capture through Inbox, access to the

Activities dashboard is available through the Einstein Analytics for Sales Cloud permission set. You can assign the permission set to up to five users. All other Inbox users have read-only access to the Activities dashboard.

Disable Read Receipts for Inbox Users

If your company prefers to not track when and where customers open email messages from your Inbox users, you can prevent all users from receiving read receipts.

EDITIONS

Available in: Salesforce Classic (not available in all orgs), Lightning Experience

Available with Inbox, which is available for an extra cost in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

EDITIONS

Available in various user experiences and Salesforce editions, depending on the Inbox feature. For more information, consult each feature.

Sales Productivity Inbox

Set Up Einstein Activity Capture for Inbox

Set up Einstein Activity Capture so that emails and events are automatically associated with related Salesforce records. Sales reps need to connect their email and calendar to Salesforce.

- 1. If Chatter isn't enabled, enable it now.
- 2. From Setup, enter *Inbox* in the Quick Find box, then select **Setup Assistant** under Inbox.
- **3.** If it's your first time visiting the Inbox Setup Assistant, click **Get Started**.

 The Inbox Setup Assistant shows all the steps you to deploy Inbox, including how to specify which users get access to Inbox features, including Einstein Activity Capture.
- **4.** Click **Set Up** next to Einstein Activity Capture.
- **5.** From the settings page, configure the Einstein Activity Capture settings, including turning on the feature.
- **6.** Remove the Last Activity Date field from page layouts for the objects that support Einstein Activity Capture. This field doesn't reflect emails and events added to Salesforce with Einstein Activity Capture.

After you turn on Einstein Activity Capture, Salesforce prompts assigned Inbox users to connect their email account to Salesforce. It takes up to 24 hours for their email messages and events to appear in Salesforce.

SEE ALSO:

Edit Page Layouts for Standard Objects Einstein Activity Capture

Give Inbox Users Access to the Activities Dashboard

The Activities dashboard provides a summary of sales activities, including the ones added with Einstein Activity Capture. When you use Einstein Activity Capture through Inbox, access to the Activities dashboard is available through the Einstein Analytics for Sales Cloud permission set. You can assign the permission set to up to five users. All other Inbox users have read-only access to the Activities dashboard.

- 1. Make sure Einstein Activity Capture is enabled.
- From Setup, enter Permission Sets in the Quick Find box, and then select Permission Sets.
- **3.** Click the **Einstein Analytics for Sales Cloud** permission set, and assign it to up to five users. Assigned users can view activity reports from the Analytics tab or Analytics Studio.
- 4. To make sure all other Inbox users have read-only access to the Activities dashboard, go to the Inbox With Einstein Activity Capture permission set. Then, make sure the Access to View-Only Licensed Templates and Apps permission is enabled. If you created a custom permission set for Inbox, go to it and enable the permission.
 Users can view activity reports from the Activities Dashboard tab, not Analytics Studio.

EDITIONS

Available in various user experiences and Salesforce editions, depending on the Inbox feature. For more information, consult each feature.

USER PERMISSIONS

To enable Einstein Activity Capture:

Customize Application and Modify All Data

EDITIONS

Available in: Salesforce Classic (not available in all orgs), Lightning Experience

Available with Inbox, which is available for an extra cost in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

USER PERMISSIONS

To give users access to activity reports:

 Customize Application AND Modify All Data

Disable Read Receipts for Inbox Users

If your company prefers to not track when and where customers open email messages from your Inbox users, you can prevent all users from receiving read receipts.

- From Setup, enter Inbox in the Quick Find box, then select Setup Assistant under Inbox.
- 2. Toggle the Send Read Receipts setting to **Disabled**.

EDITIONS

Available in various user experiences and Salesforce editions, depending on the Inbox feature. For more information, consult each feature.

USER PERMISSIONS

To set up Inbox

Customize Application
AND Modify All Data

Lightning for Outlook

Sales reps spend most of their day in Microsoft[®] Outlook[®]. Isn't it time to use Outlook and Salesforce together? If your teams use Outlook on the web, Outlook 2016, Outlook for Mac 2016, or Outlook 2013, Lightning for Outlook helps them manage their sales more efficiently. Your sales reps can view, edit, and add Salesforce records directly in Outlook, and associate emails and events to Salesforce records.

• Connecting to Salesforce in Outlook (English Only)

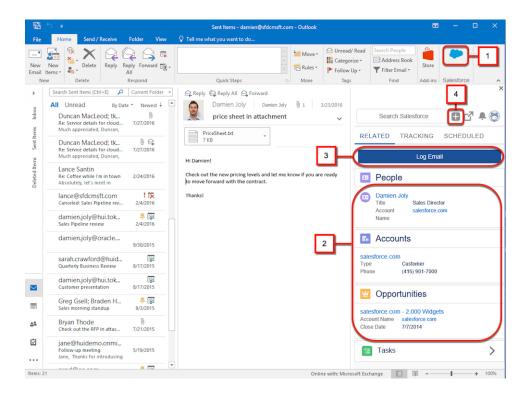
After you enable Lightning for Outlook, sales reps install the Lightning for Outlook add-in from the Office Store. You can also push the add-in from the Microsoft Exchange server.

After sales reps complete a short setup procedure to connect their email to Salesforce, they can access Lightning for Outlook (1), see matching contacts, leads, accounts, and other Salesforce records (2), and relate email to Salesforce records (3). Sales reps can also create records directly from Outlook (4).

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available with Sales Cloud, Service Cloud, and Lightning Platform in: **Essentials**, **Group, Professional**, **Enterprise, Performance**, **Unlimited**, and **Developer** Editions



Sales reps can also relate calendar events they are attending. If reps are working in Outlook 2016 for Windows or Outlook on the web, they can also relate any event they are organizing.

Lightning for Outlook and Inbox Beta for Outlook

The integration to Outlook on a desktop or on the web is available in two experiences: Lightning for Outlook and Inbox Beta for Outlook. Each experience offers features that save your reps time and keep your teams in sync.

Set Up Lightning for Outlook

Help your teams get more done than ever before without switching between Microsoft® Outlook® and Salesforce. Turn on Lightning for Outlook and install the Lightning for Outlook add-in to get up and running fast with the default email application pane layouts.

Use Lightning for Outlook

Increase your productivity and work smarter and faster without leaving Microsoft® Outlook®. With Lightning for Outlook, see relevant Salesforce records and relate emails to Salesforce, keeping your teammates up-to-date with your communications.

SEE ALSO:

Lightning for Outlook System Requirements

Experience Salesforce in Microsoft® Outlook®

Lightning for Outlook and Inbox Beta for Outlook

Lightning for Outlook and Inbox Beta for Outlook

The integration to Outlook on a desktop or on the web is available in two experiences: Lightning for Outlook and Inbox Beta for Outlook. Each experience offers features that save your reps time and keep your teams in sync.

| Version | Description | What You Can Do |
|--|---|--|
| Lightning for Outlook | Review related Salesforce data while viewing emails, such as people and opportunity records, and save time when inputting information into Salesforce. Lightning for Outlook is available free to all Salesforce users who use Outlook. | Associate emails to Salesforce records, either manually or with the help of Einstein Activity Capture Create records View related records Access Salesforce tasks Create emails using Salesforce templates |
| Lightning for Outlook with Inbox Beta for Outlook | All the benefits of Lightning for Outlook, plus help sales reps be even more productive by providing tools to increase productivity while composing emails. Inbox Beta for Outlook is available at an extra cost. | Use all the Lightning for Outlook features Associate emails to custom records directly from the related records list Automate meeting scheduling by inserting calendar availability Schedule an email to send later Track when emails are opened and links are clicked |

EDITIONS

Available in Salesforce Classic and Lightning Experience

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

If you use Salesforce Inbox on your iOS[™] or Android[™] device, see Inbox.



Note: As a beta feature, Inbox Beta for Outlook is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only from generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Inbox Beta for Outlook in the IdeaExchange and through the Trailblazer Community. For information about enabling this feature in your organization, contact Salesforce.

SEE ALSO:

Inbox

Set Up Lightning for Outlook

Help your teams get more done than ever before without switching between Microsoft® Outlook® and Salesforce. Turn on Lightning for Outlook and install the Lightning for Outlook add-in to get up and running fast with the default email application pane layouts.

Lightning for Outlook System Requirements

Make sure that your system meets these requirements before you set up Lightning for Outlook.

Considerations for Setting Up Lightning for Outlook

Before setting up Lightning for Outlook or your sales reps, consider which features you want to enable and whether users need access to different components.

Turn On Lightning for Outlook

Help your teams see and create Salesforce records with global actions directly in Outlook on the web, Outlook 2016, Outlook for Mac 2016, and Outlook 2013.

Select Who Can Use Inbox Beta for Outlook Features

Help sales reps be even more productive within their email environment by providing more productivity tools for composing email. If you use Inbox Beta for Outlook, an enhanced version of Lightning for Outlook, use permission sets to turn on the productivity features for sales reps who need them.

Add Lightning for Outlook from the Microsoft® Exchange® Center

Before your sales teams can experience Lightning for Outlook, your team members need access to the Lightning for Outlook add-in. Team members can get and enable the add-in themselves. Alternatively, you can help them complete this step faster and avoid setup issues at the same time. Ask your company's Microsoft Exchange administrator to give all team members access to the Lightning for Outlook add-in simultaneously. That way, your sales reps can save time and begin working in Lightning for Outlook right away.

Lightning for Outlook with Enhanced Email

Turn on Enhanced Email with Lightning for Outlook so sales reps can relate emails to relevant Salesforce records quicker and more easily.

Customize Lightning for Outlook

Lightning for Outlook provides a default email application pane that defines the components available in Lightning for Outlook. However, different sales reps need different features when they are working with Salesforce data in Outlook. Customize Lightning for Outlook to include the components that fit how your reps work.

Give Microsoft® Outlook® Access to Salesforce

Get your systems ready to create Salesforce contacts, and view contacts, leads, and users. Even see related accounts, opportunities, and cases directly in Outlook on the web, Outlook 2016, Outlook for Mac 2016, and Outlook 2013.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available with Sales Cloud, Service Cloud, and Lightning Platform in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Lightning for Outlook System Requirements

Make sure that your system meets these requirements before you set up Lightning for Outlook.



configurations

Tip: Before you set up Lightning for Outlook, disable two-factor authentication for sales reps who are moving to Lightning for Outlook. This setup allows them to use Lightning for Outlook without having to enter their username and password multiple times.

| For your | You need | | |
|--|---|--|--|
| Email server | Either: | | |
| | • Exchange 2016 or 2013 on-premises | | |
| | • Exchange Online with Office 365 | | |
| Email application | Either: | | |
| | Outlook on the web | | |
| | Microsoft® Outlook® 2016 or 2013 on Windows PC, most recent stable version recommended | | |
| | • Microsoft Outlook for Mac 2016, Mac OS X 10.10 or later with AppleWebKit 600 or later | | |
| | For the best experience, ensure that Use Cache Mode in the Outlook Account Settings is turned on. | | |
| Browser | Any of these browsers on Windows or Mac operating systems. Make sure that the browser is set to allow cookies from Salesforce. | | |
| | Google Chrome[™], most recent stable version | | |
| | Mozilla® Firefox®, most recent stable version | | |
| | • Apple Safari 10 or later, most recent stable version recommended | | |
| | • Microsoft Internet Explorer® 11 (Windows only) | | |
| | Microsoft Edge, most recent stable version (Windows only) | | |
| | If you're using Lightning for Outlook or Inbox Beta for Outlook in a desktop version of Outlook, Microsoft Internet Explorer 11 is required on the desktop computer. However, you're not required to use Internet Explorer as your default browser. | | |
| Security encryption protocol on your email server | TLS 1.1 or later. | | |
| Other Features | Requirement | | |
| Server | We support using terminal servers, such as Citrix® servers. | | |

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available with Sales Cloud, Service Cloud, and Lightning Platform in: Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer **Editions**

Considerations for Setting Up Lightning for Outlook

Before setting up Lightning for Outlook or your sales reps, consider which features you want to enable and whether users need access to different components.

- To use Lightning for Outlook, each sales rep must have the Lightning for Outlook add-in added in Microsoft® Outlook® to use the application. You can make the application available through the Microsoft Exchange Center or have your reps download the add-in from the Office Store. There is no local install file.
- There are multiple settings available on the Lightning for Outlook setup page. Enable the features that your sales reps need.
- If you haven't already, consider moving to Inbox Beta for Outlook. With Inbox Beta for Outlook, sales reps can take advantage of productivity features when composing emails and be even more efficient than they are today.
- If you've moved to Inbox Beta for Outlook from Salesforce Inbox, the settings in the Setup Assistant for Salesforce Inbox don't apply to Inbox Beta for Outlook. To remove features such as email tracking from Inbox Beta for Outlook, remove the components from the email application panes in the Lightning App Builder. Use the Setup Assistant to configure Inbox for your mobile users.
- Enhanced Email allows reps to easily associate emails they are composing to relevant Salesforce records. When Enhanced Email is disabled, emails are associated as tasks. Also enable Email to Salesforce.
- Lightning for Outlook includes a set of default email application panes and publisher layouts so you can get up and running quickly. You can customize each of these panes and assign them to user profiles, as needed.
- Set up Einstein Activity Capture to automatically associate emails to Salesforce records while still being able to create records, see related records, and see Einstein insights.
- Salesforce includes a managed list of Microsoft Outlook web app domains, such as outlook.com and office365.com. To make sure that your reps who access their Outlook email on the web can use Lightning for Outlook, indicate that you allow access from the Salesforce-managed list. Also add any of your own trusted domains, such as webmail.your company.com.

SEE ALSO:

Lightning for Outlook with Enhanced Email Customize Lightning for Outlook Set Up Email to Salesforce Email Application Publisher Layouts Einstein Activity Capture

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available with Sales Cloud, Service Cloud, and Lightning Platform in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Turn On Lightning for Outlook

Help your teams see and create Salesforce records with global actions directly in Outlook on the web, Outlook 2016, Outlook for Mac 2016, and Outlook 2013.

- 1. From Setup, in the Quick Find box, enter Outlook, and then select Lightning for Outlook and Sync.
- 2. Enable Let users access Salesforce records from Outlook.
- **3.** If you're using Office 365, allow Salesforce access from the Office 365 Outlook on the web domain. If you're using custom Outlook for the web domains, add those domains to allow access.

All users have access to Lightning for Outlook with the default email application pane layout. Next, customize the app for each user profile, and decide how you want to install the add-in application for your sales teams.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available with Sales Cloud, Service Cloud, and Lightning Platform in: **Essentials**, **Group, Professional**, **Enterprise, Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Lightning for Outlook

Customize Application

Select Who Can Use Inbox Beta for Outlook Features

Help sales reps be even more productive within their email environment by providing more productivity tools for composing email. If you use Inbox Beta for Outlook, an enhanced version of Lightning for Outlook, use permission sets to turn on the productivity features for sales reps who need them.

Inbox Beta for Outlook uses standard permission sets:

- Inbox With Einstein Activity Capture
- Inbox Without Einstein Activity Capture

If you are migrating to Inbox Beta for Outlook from Salesforce Inbox, you likely already have the permission sets assigned to your reps. Assign one of permissions to the sales reps you want to have access to Inbox productivity features within Outlook. For more information on identifying who can access Inbox features, see Select Who Can Use Inbox.



Note: As a beta feature, Inbox Beta for Outlook is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only from generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Inbox Beta for Outlook in the IdeaExchange and through

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available with Sales Cloud, Service Cloud, and Lightning Platform for an extra cost in: **Group, Professional, Enterprise, Performance, Unlimited**, and **Developer** Editions

USER PERMISSIONS

Enable Lightning for Outlook

Customize Application

the Trailblazer Community. For information about enabling this feature in your organization, contact Salesforce.

SEE ALSO:

Permission Sets Customize Lightning for Outlook Einstein Activity Capture

Add Lightning for Outlook from the Microsoft® Exchange® Center

Before your sales teams can experience Lightning for Outlook, your team members need access to the Lightning for Outlook add-in. Team members can get and enable the add-in themselves. Alternatively, you can help them complete this step faster and avoid setup issues at the same time. Ask your company's Microsoft Exchange administrator to give all team members access to the Lightning for Outlook add-in simultaneously. That way, your sales reps can save time and begin working in Lightning for Outlook right away.



🁔 Tip: To authorize Outlook users to add Office add-ins, such as Lightning for Outlook, make sure that they have the right permissions. For more information, review this Microsoft article.

To enable the Lightning for Outlook add-in for your team, work with your Exchange administrator to complete these steps from the Microsoft Exchange Admin Center.

- 1. In the Exchange Admin Center, click the **Admin** tile to go to the Admin Center.
- 2. From the Admin Center, click Exchange.
- 3. Under organization, click add-ins.
- Click and select the **Add from the Office Store** option.
 - Note: The Add from URL and Add from file options are not available.
- 5. From the Add-ins for Outlook page, enter Lightning for Outlook in the Search box and select **Salesforce Lightning for Outlook** from the search results.
- **6.** Click **Add** to confirm that you want to get the Lightning for Outlook add-in.
 - [] Important: To avoid errors at this step, make sure that your Exchange server can connect to the Microsoft Office Store.
- 7. From the Manage Add-in page, set one of these options depending on how you want to give your reps access to the Lightning for Outlook add-in.
 - Optional, enabled by default
 - Optional, disabled by default
 - Mandatory, always enabled. Users can't disable this add-in.
 - Note: To enable the Lightning for Outlook add-in for a subset of your reps, you can use PowersShell[™] commands. For more information, review the Microsoft Exchange Mailbox cmdlets article.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available with Sales Cloud, Service Cloud, and Lightning Platform in: Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer **Editions**

USER PERMISSIONS

To enable Lightning for Outlook on behalf of users

Administrative access to your company's Microsoft Exchange Admin Center

To make Lightning for Outlook available to your sales teams, complete the steps to enable Lightning for Outlook in Salesforce.

SEE ALSO:

Microsoft Exchange New-App Library

Lightning for Outlook with Enhanced Email

Turn on Enhanced Email with Lightning for Outlook so sales reps can relate emails to relevant Salesforce records quicker and more easily.

With Enhanced Email:

- Reps can relate emails to Salesforce records while composing the emails.
- Reps can relate an email to all relevant contacts, leads, and users.
- When reps relate an email to a relevant account, opportunity, case, or custom object, all contacts, leads, and individuals on the email are automatically related.
- Related emails maintain their rich HTML formatting, so emails have the same look and feel in Salesforce as they did in Outlook®.

EDITIONS

Available to manage from Salesforce Classic and Lightning Experience

Available in: Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

Considerations for Enhanced Email with Lightning for Outlook

Before turning on Enhanced Email for Lightning for Outlook, review the following considerations:

- Sales reps can relate an email to individuals, including contacts, leads, and Salesforce users who are included on the email recipient list.
- In addition to the email recipients, sales reps can relate an email to one more Salesforce record, such as account, opportunity, case, or custom object.
- For emails related to a case, sales reps can change the relationship to another case after deleting the original Email Message record. This action removes the original relationship.
- For emails related to a lead, sales reps can change the relationship to another lead if that lead is the email's recipient or sender.
- For emails related to an account, opportunity, or a custom object record, sales reps can change the relationship to any other Salesforce records, except cases.

Customize Lightning for Outlook

Lightning for Outlook provides a default email application pane that defines the components available in Lightning for Outlook. However, different sales reps need different features when they are working with Salesforce data in Outlook. Customize Lightning for Outlook to include the components that fit how your reps work.

Set up Lightning for Outlook to use custom email application panes.

- 1. From Setup, in the Quick Find box, enter Outlook, and then select Lightning for Outlook and Sync.
- 2. Click Let users access Salesforce records from Outlook.
- 3. Enable Customize content with App Builder.

You're ready to create custom email application panes with the Lightning App Builder.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available with Sales Cloud, Service Cloud, and Lightning Platform in: **Essentials**, **Group, Professional**, **Enterprise, Performance**, **Unlimited**, and **Developer** Editions

1. Create Custom Email Application Panes for Lightning for Outlook

When you create custom email application panes, you set the Salesforce content and features that sales reps see in Microsoft® Outlook®. Use the Lightning App Builder to create custom application panes.

2. Assign Custom Email Application Panes for Lightning for Outlook

To get your reps up and running using custom email application panes, activate the panes and assign them to user profiles. Set a custom email application pane as the default for all users, or assign a pane to specific user profiles.

Create Custom Email Application Panes for Lightning for Outlook

When you create custom email application panes, you set the Salesforce content and features that sales reps see in Microsoft[®] Outlook[®]. Use the Lightning App Builder to create custom application

Create an email application pane. Then, add standard or custom components that you want your sales reps to see and work with in Outlook. You can also add components from AppExchange.



Note: If you use **Inbox Beta for Outlook**, you can add Inbox components, such as email tracking, to your panes. Only users with an Inbox license can see Inbox components.

- 1. Navigate to the Lightning App Builder.
 - In Lightning Experience:

From Setup, in the Quick Find box, enter Outlook, and then select **Lightning for Outlook** and Sync. Click Let users access Salesforce records from Outlook. Click New under Email Application Panes. Follow the steps until you reach the design window.

If you're adding Inbox components, click **New Inbox Beta Pane**. Follow the steps until you reach the design window.

In Salesforce Classic:

From Setup, in the Quick Find box, enter App Builder, and then select **New** under Lightning Pages. Select **Email Application Pane**. Follow the steps until you reach the design window.

- 2. Drag components onto the pane, and arrange them in the order you want them to appear.
- 3. Click the empty area of the canvas to view the page properties, add a description, or create a filter with criteria that determines when a component is shown.
 - [2] Tip: Some components are useful when reading emails or viewing events while others are useful when composing emails or editing events. Use a filter to determine when a particular component is shown.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available with Sales Cloud. Service Cloud, and Lightning Platform in: Essentials, Group, Professional, **Enterprise**, Performance, Unlimited, and Developer **Editions**

USER PERMISSIONS

To set up Lightning for Outlook to use custom email application panes

Customize Application

To create and save Lightning pages in the Lightning App Builder

Customize Application

To view Lightning pages in the Lightning App Builder

View Setup and Configuration

4. Click Save.

5. You're ready to activate the pane and assign it to user profiles. Go to the Lightning App Builder to activate. You can also assign the pane to user profiles using the Set Page Assignment options in the Lightning for Outlook and Sync setup page.

SEE ALSO:

Customize Lightning for Outlook Dynamic Lightning Pages Dynamic Lightning Pages

Assign Custom Email Application Panes for Lightning for Outlook

To get your reps up and running using custom email application panes, activate the panes and assign them to user profiles. Set a custom email application pane as the default for all users, or assign a pane to specific user profiles.



Note: To see Inbox Beta for Outlook components in an email application pane, reps need an Inbox license, regardless of their user profile.

- 1. Navigate to your custom email application panes.
 - In Lightning Experience:

From Setup, in the Quick Find box, enter Outlook, and then select **Lightning for Outlook** and **Sync**. Click **Let users access Salesforce records from Outlook** and go to the Email Application Pane Assignments by Profile section.

In Salesforce Classic:

From Setup, in the Quick Find Box, enter App Builder, and then select **Lightning App** Builder Settings. Click Edit next to the email application pane you want to assign. Click Activation.

- 2. Select to assign a custom pane as the new default, or assign the pane to specific user profiles.
- **3.** Select the profiles to assign the pane to and follow the on-screen steps to assign the pane.

SEE ALSO:

Customize Lightning for Outlook

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available with Sales Cloud, Service Cloud, and Lightning Platform in: **Essentials**, **Group, Professional**, **Enterprise, Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To set up Lightning for Outlook to use custom email application panes

Customize Application

To create and save Lightning pages in the Lightning App Builder

Customize Application

To view Lightning pages in the Lightning App Builder

 View Setup and Configuration

Give Microsoft® Outlook® Access to Salesforce

Get your systems ready to create Salesforce contacts, and view contacts, leads, and users. Even see related accounts, opportunities, and cases directly in Outlook on the web, Outlook 2016, Outlook for Mac 2016, and Outlook 2013.

1. In Outlook on the web, Outlook 2016, Outlook for Mac 2016, or Outlook 2013, select an email in either the Inbox or Sent Items, or an event in the calendar. Reps then select **Salesforce**. A prompt appears for logging in to Salesforce.

EDITIONS

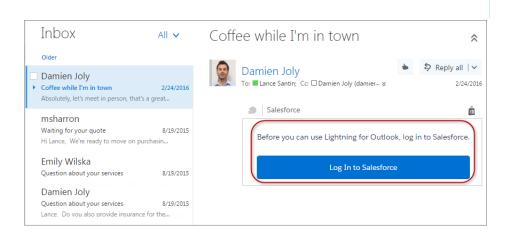
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available with Sales Cloud, Service Cloud, and Lightning Platform in: **Essentials**, **Group, Professional**, **Enterprise, Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To set up Lightning for Outlook

Lightning for Outlook



2. After you log in to Salesforce, relevant records appear.

Use Lightning for Outlook

Increase your productivity and work smarter and faster without leaving Microsoft® Outlook®. With Lightning for Outlook, see relevant Salesforce records and relate emails to Salesforce, keeping your teammates up-to-date with your communications.

Get Access to Lightning for Outlook

To start using Lightning for Outlook, get the Lightning for Outlook add-in from the Microsoft Office Store and connect your email account. Review the system requirements to make sure that you're running a supported version of Microsoft® Outlook®.

Experience Salesforce in Microsoft® Outlook®

Lightning for Outlook appears as a side panel next to an open email or event in Microsoft® Outlook®.

View and Work with Salesforce Data in Lightning for Outlook

With Lightning for Outlook, you can access Salesforce data from an email and create Salesforce records without having to leave Microsoft® Outlook®. Not having to switch between your email and Salesforce saves you time and helps to ensure that Salesforce is up-to-date with the latest communications.

Use Inbox Beta for Outlook to Increase Productivity

You already use email to work fast and smart. Be even more productive when composing email when you use Inbox Beta for Outlook features.

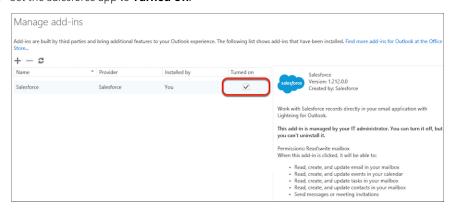
Get Access to Lightning for Outlook

To start using Lightning for Outlook, get the Lightning for Outlook add-in from the Microsoft Office Store and connect your email account. Review the system requirements to make sure that you're running a supported version of Microsoft[®] Outlook[®].

- Note: These instructions could differ based on your version of Outlook.
- In Outlook, click Add-ins and download the Lightning for Outlook add-in from the Microsoft Office Store.

If you don't have access to the Microsoft Office Store, see your Salesforce admin about how to continue.

- 2. In Outlook, open the File menu, and then select Manage Add-ins.
- **3.** Set the Salesforce app to **Turned On**.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available with Sales Cloud, Service Cloud, and Lightning Platform in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available with Sales Cloud, Service Cloud, and Lightning Platform in: **Essentials**, **Group, Professional**, **Enterprise, Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

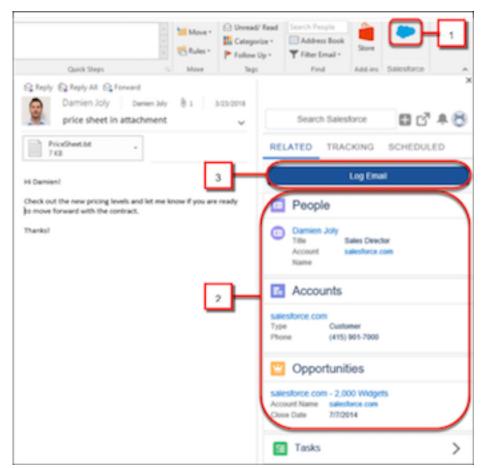
To use Lightning for Outlook

Lightning for Outlook

- **4.** When reading or composing an email, click the Salesforce icon to open the app.
- **5.** Use your Salesforce username and password to log in.
- **6.** Confirm when prompted to connect your email account to Salesforce.

Experience Salesforce in Microsoft® Outlook®

Lightning for Outlook appears as a side panel next to an open email or event in Microsoft® Outlook®.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available with Sales Cloud, Service Cloud, and Lightning Platform in: **Essentials**, **Group, Professional**, **Enterprise, Performance**, **Unlimited**, and **Developer** Editions

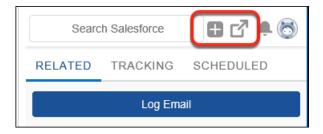
1. From Outlook, click the Salesforce icon to access Lightning for Outlook.

The panel is where you see and interact with your Salesforce information. The options available are specific to actions you can take while you're reading or composing an email.

- 1 Tip: To keep the panel open as you move through your email, click the pin icon. The pin option is available in Outlook 2016 on Windows that is installed using Click-to-Run with build 7900 or higher, and in Outlook on the web.
- 2. See Salesforce accounts, opportunities, contacts, and leads that match an address on the email.

 Select a matching record to view more details, such as Chatter feeds, activity timeline, and related lists. You can also edit Salesforce records directly from Outlook.
- 3. Log the email to Salesforce by relating it to a matching record.

 You can also create a Salesforce record directly from Outlook. If you need even more details, you can launch Salesforce from the email, without having to enter your login credentials again.



SEE ALSO:

Lightning for Outlook
Lightning for Outlook System Requirements

View and Work with Salesforce Data in Lightning for Outlook

With Lightning for Outlook, you can access Salesforce data from an email and create Salesforce records without having to leave Microsoft® Outlook®. Not having to switch between your email and Salesforce saves you time and helps to ensure that Salesforce is up-to-date with the latest communications.

Create Records from Lightning for Outlook

You're having a productive day reading and responding to email messages, connecting with your customers, and following up on leads. You see an email from a new prospect and you want to add that prospect to Salesforce. Add a record for the prospect directly from Microsoft[®] Outlook[®].

Log Emails and Events to Salesforce from Lightning for Outlook

Keep your opportunities moving and your teammates up-to-date with your latest communications. Log Microsoft® Outlook® emails and calendar events by relating them to Salesforce people, contacts, and other records.

Create Records from Lightning for Outlook

You're having a productive day reading and responding to email messages, connecting with your customers, and following up on leads. You see an email from a new prospect and you want to add that prospect to Salesforce. Add a record for the prospect directly from Microsoft® Outlook®.

In an open email, Lightning for Outlook recognizes email addresses that don't match a record in Salesforce. Add those people to Salesforce as a new contact or a lead.

EDITIONS

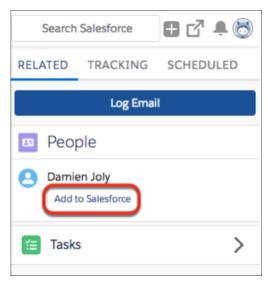
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available with Sales Cloud, Service Cloud, and Lightning Platform in: **Essentials**, **Group, Professional**, **Enterprise, Performance**, **Unlimited**, and **Developer** Editions

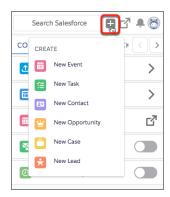
EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available with Sales Cloud, Service Cloud, and Lightning Platform in: **Essentials**, **Group, Professional**, **Enterprise, Performance**, **Unlimited**, and **Developer** Editions



You can also create records at any time using the add option in the navigation menu.



Log Emails and Events to Salesforce from Lightning for Outlook

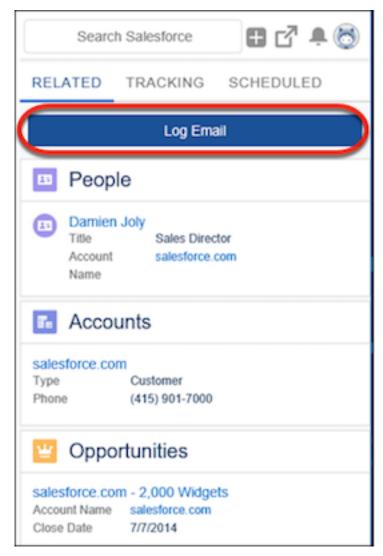
Keep your opportunities moving and your teammates up-to-date with your latest communications. Log Microsoft® Outlook® emails and calendar events by relating them to Salesforce people, contacts, and other records.

When reading an email or event, click **Log Email** and select the people records you want to relate the email to in Salesforce. You can also select one other record type, such as an opportunity.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

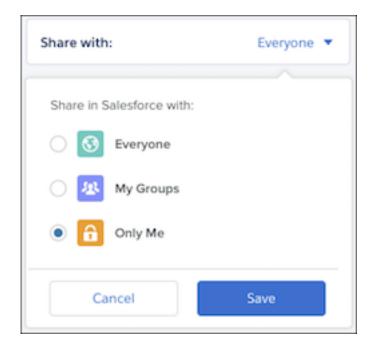
Available with Sales Cloud, Service Cloud, and Lightning Platform in: Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions



If you're composing an email, select the Salesforce records you want to relate the email to. The relation happens after the email is sent. If you're organizing an event, save the event first, and then relate it to a Salesforce record.

Sharing Emails and Events with Einstein Activity Capture

If Lightning for Outlook has a **Share** option instead of a **Log Email** option, you're using Einstein Activity Capture to automatically relate emails to matching records in Salesforce. Emails and events are related based on your Activity Sharing settings in Salesforce. You can change how an individual email is shared in Outlook. Update your default settings for all emails in your personal settings in Salesforce.



SEE ALSO:

Einstein Activity Capture

Control How Activities Added by Einstein Activity Capture Are Shared

Use Inbox Beta for Outlook to Increase Productivity

You already use email to work fast and smart. Be even more productive when composing email when you use Inbox Beta for Outlook features.

Connecting to Salesforce in Outlook (English Only)

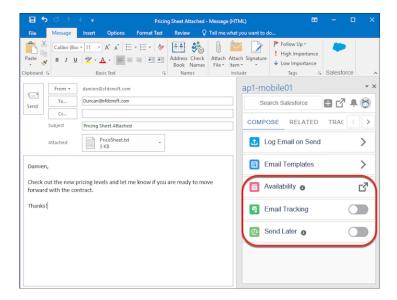


Note: As a beta feature, Inbox Beta for Outlook is a preview and isn't part of the "Services" under your master subscription agreement with Salesforce. Use this feature at your sole discretion, and make your purchase decisions only from generally available products and features. Salesforce doesn't guarantee general availability of this feature within any particular time frame or at all, and we can discontinue it at any time. This feature is for evaluation purposes only, not for production use. It's offered as is and isn't supported, and Salesforce has no liability for any harm or damage arising out of or in connection with it. All restrictions, Salesforce reservation of rights, obligations concerning the Services, and terms for related Non-Salesforce Applications and Content apply equally to your use of this feature. You can provide feedback and suggestions for Inbox Beta for Outlook in the IdeaExchange and through the Trailblazer Community. For information about enabling this feature in your organization, contact Salesforce.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available for an extra cost in Sales Cloud, Service Cloud, and Lightning Platform in: Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions



Schedule When Emails Are Sent

Sometimes you don't want to send your email right away. Schedule an email so that it's delivered to your prospect or customer when it has the biggest impact.

Set Tracking for Emails

Get a better understanding of who's engaging with your emails. When you set tracking, you can see who's opening the emails you sent and clicking the links in those emails.

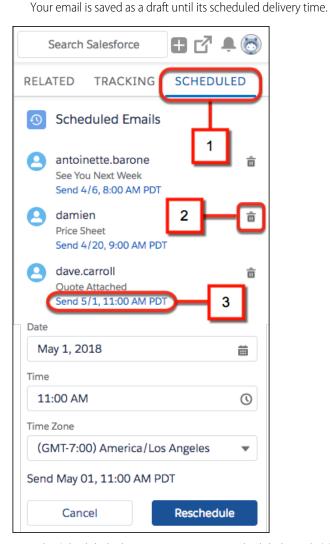
Insert Your Calendar Availability into an Email

Insert free time slots from your calendar directly in an email and avoid back-and-forth emails when scheduling a meeting. Recipients can select which time works best for them, and the time is automatically scheduled.

Schedule When Emails Are Sent

Sometimes you don't want to send your email right away. Schedule an email so that it's delivered to your prospect or customer when it has the biggest impact.

- 1. In an email you're composing, click **Send Later**.
- 2. Enter the date and time information for when you want to send the email.
- 3. Click Send Later.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available for an extra cost in

Sales Cloud, Service Cloud, and Lightning Platform in: Essentials, Group, Professional, Enterprise, Performance, Unlimited,

USER PERMISSIONS

and **Developer** Editions

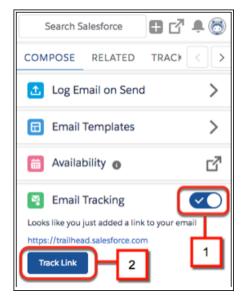
To use Inbox Beta for Outlook features

Inbox With Einstein
 Activity Capture or Inbox
 Without Einstein Activity
 Capture permission set

From the Scheduled tab, you can review your scheduled emails (1), delete a draft (2), or change the delivery date and time (3).

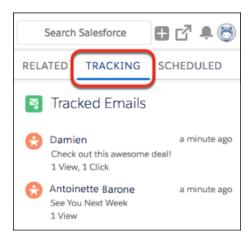
Set Tracking for Emails

Get a better understanding of who's engaging with your emails. When you set tracking, you can see who's opening the emails you sent and clicking the links in those emails.



- 1. From the Compose tab, turn on Email Tracking (1).
- **2.** If the email includes a link, click **Track Link** (2) to track when a recipient clicks the link. Email Tracking must be turned on for an email to track any links.

From the Tracking tab, review when tracked emails are opened and when links are clicked.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available for an extra cost in Sales Cloud, Service Cloud, and Lightning Platform in:

Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To use Inbox Beta for Outlook features

Inbox With Einstein
 Activity Capture or Inbox
 Without Einstein Activity
 Capture permission set

Insert Your Calendar Availability into an Email

Insert free time slots from your calendar directly in an email and avoid back-and-forth emails when scheduling a meeting. Recipients can select which time works best for them, and the time is automatically scheduled.

Note: This feature isn't accessible according to WCAG 2.0 compliance standards.

- 1. In an email you're composing, click **Availability**.
- **2.** Select one or more open time slots from your calendar. Or, if attendees have shared their calendars with you, select times that are open for all.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

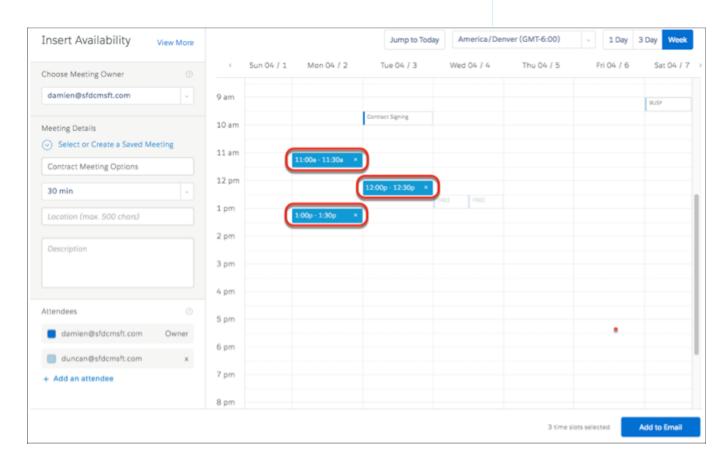
Available for an extra cost in Sales Cloud, Service Cloud, and Lightning Platform in:

Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

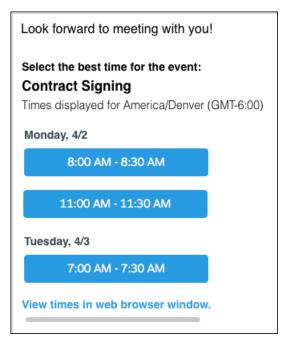
To use Inbox Beta for Outlook features

Inbox With Einstein
 Activity Capture or Inbox
 Without Einstein Activity
 Capture permission set



3. Click Add to Email.

When recipients select one of the suggested times, the meeting is automatically scheduled. The suggested times that the recipient sees are updated as your availability changes.



Lightning Sync

Keep contacts and events in sync between your Microsoft® or Google applications and Salesforce using our cloud-based integration product. What's so great about syncing from the cloud, you ask? Well, it means that to get the job done, you don't have to install or update software manually. It also means that Salesforce admins and IT pros do less work to maintain the feature.

Lightning Sync is compatible with several versions of Microsoft $^{\circ}$ Exchange, Google Contacts, and Google Calendar $^{\circ}$.

Lightning Sync for Microsoft Exchange can sync contacts and events between your Microsoft Exchange-based calendar and Salesforce.

Lightning Sync for Google can sync contacts and events between your G Suite account and Salesforce.

Lightning Sync User License Support

You can set up Lightning Sync for users who are assigned to Sales Cloud, Service Cloud, and most Lightning Platform licenses. Different Lightning Sync features are available depending on which license your users are working from.

Lightning Sync System Requirements

Confirm that your Microsoft® Exchange-based server or Google G Suite account meet these system requirements before you set up your sales reps for Lightning Sync.

How Your Stuff Syncs When You're Using Lightning Sync

Learn how Lightning Sync handles your contacts and events when you're set up to use Lightning Sync.

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Lightning Sync Considerations

Before you roll out Lightning Sync to your sales reps, familiarize yourself with these considerations.

See the Big Picture for Setting Up Lightning Sync for Microsoft® Exchange

Salesforce admins can set up Lightning Sync so reps can sync contacts and events between Microsoft® Exchange and Salesforce. Salesforce admins and IT pros complete several steps, both on your Exchange server and in Salesforce.

See the Big Picture for Setting Up Lightning Sync for Google

Salesforce admins can set up Lightning Sync so reps can sync contacts and events between your company's G Suite account and Salesforce. Salesforce admins and IT pros complete several steps, both from your company's G Suite account and from Salesforce.

Manage Lightning Sync Users

After you've set up Lightning Sync, manage how your sales reps experience the feature and assist users in troubleshooting problems.

Get Help Setting Up Lightning Sync

Lightning Sync User License Support

You can set up Lightning Sync for users who are assigned to Sales Cloud, Service Cloud, and most Lightning Platform licenses. Different Lightning Sync features are available depending on which license your users are working from.

| Feature | Sales Cloud | Service Cloud | Lightning Platform Salesforce Platform | Lightning Platform - OneApp | Lightning Platform App Subscription |
|--|-------------|------------------|---|-----------------------------------|--|
| Sync contacts in any direction | ~ | ✓ | ✓ | | ~ |
| Sync events from Exchange or Google to Salesforce | * | * | ✓ | * | * |
| Sync events from Salesforce to Exchange or Google | * | * | | ✓ | |
| Sync events both ways | ~ | * | | ~ | |
| Automatically relate events to multiple relevant Salesforce contacts or one lead | * | * | * | * | * |

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Lightning Sync System Requirements

Confirm that your Microsoft® Exchange-based server or Google G Suite account meet these system requirements before you set up your sales reps for Lightning Sync.

Lightning Sync for Google

Your company must be using G Suite by Google Cloud. Lightning Sync supports Basic, Business, or Enterprise editions.

Lightning Sync for Microsoft Exchange

| To connect to Salesforce using | Your company must be running either | With these settings enabled |
|--------------------------------|---|--|
| An Exchange service account | Office 365° Enterprise Editions with Exchange Online Exchange Server 2016 Exchange Server 2013 Service Pack 1 | Exchange Web Services (EWS) on an SSL connection Exchange Autodiscover Service Basic authentication on both your Exchange server and your Autodiscover service Encryption protocol TLS 1.1 or later |
| OAuth 2.0 for Exchange | Office 365® Enterprise Editions with Exchange Online | No additional settings are required to connect using OAuth 2.0 |

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

How Your Stuff Syncs When You're Using Lightning Sync

Learn how Lightning Sync handles your contacts and events when you're set up to use Lightning Sync.

Event Attendees Sync

Learn how and when Lightning Sync syncs event attendees (Lightning Experience) or invitees (Salesforce Classic) between Microsoft® or Google Calendars™ and Salesforce.

Private Event Sync

Learn how private events sync from your calendar application to Salesforce when you're set up to use Lightning Sync.

Person Account Sync

Learn how and when Lightning Sync syncs person account details between Google Contacts or Microsoft® contacts and Salesforce.

Event Delete

You can set up sales reps to delete events—from both their calendar and Salesforce—in one action.

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

Event Attendees Sync

Learn how and when Lightning Sync syncs event attendees (Lightning Experience) or invitees (Salesforce Classic) between Microsoft® or Google Calendars™ and Salesforce.

Your whole sales team can see which coworkers, prospects, or customers are invited to sales meetings—even if events are created in Microsoft or Google applications. Team members can see who's going to show up, because attendees' responses sync, too.



Note: In Lightning Experience, people you invite to meetings are referred to as "attendees". In Salesforce Classic, those same people are called "invitees". Here we refer to both as attendees and indicate which user experience we're referring to.

Event attendee details from Microsoft or Google sync to Salesforce automatically when:

- The event creator is set up to sync events with Lightning Sync.
- The event attendees' email addresses match Salesforce users, leads, and contacts. Lightning Sync syncs up to 50 attendees between systems, with preference given in the order listed. For example, if an event has 50 attendees who are Salesforce users and 10 who are leads, only the 50 attendees sync. Or, if an event has 10 attendees who are Salesforce users, 10 who are leads, and 10 who are contacts, all attendees sync.

Event attendee sync works through the event creator. Sales teams get the most from event attendee sync when Salesforce admins set up event sync for all Salesforce users who meet together frequently. Otherwise, attendees can experience some limitations.

General Attendees Sync Limitations

If event creators invite people to events from their Microsoft calendars, but don't have access to leads and contacts who match those people in Salesforce, those leads and leads aren't synced to the Salesforce event.

If the event creator isn't set up to sync, the event is synced separately for each attendee. On each attendee's version of the event, the attendee is the creator and only participant. A full list of the attendees isn't available.

Up to 50 event attendees sync between Salesforce and Microsoft Exchange or Google.

For already-scheduled events, attendees could see duplicates in Salesforce after:

EDITIONS

Available in: Salesforce Classic, Lightning Experience, and all versions of the Salesforce app

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

- Admins set up an event creator to sync when attendees have already been syncing
- Admins reset sync for event creators and attendees.

Attendees Sync Limitations in Lightning Experience or the Salesforce App

See these considerations and limitations for working with attendees in Lightning Experience or the Salesforce app.

- Considerations for Sync Directions
- What's Different or Not Available in Lightning Experience: Event Attendees
- What's Different or Not Available in the Salesforce App: Activities (Events and Calendars)

SEE ALSO:

Set Up Reps to Work with Event Attendees in Lightning Experience and the Salesforce App

Private Event Sync

Learn how private events sync from your calendar application to Salesforce when you're set up to use Lightning Sync.

If you're using Lightning Sync, ask your Salesforce admin whether your private events are set up to sync between your calendar application and Salesforce. Admins can set private events to sync by selecting Sync Private Events in your Lightning Sync configuration. Private events sync according to the filters admins have set in the rep's configuration.

After selecting, new and updated private events sync during the next sync cycle (usually sync cycles occur every few minutes).

When private events start syncing, private event details are visible to your colleagues depending on two factors: Which system events are viewed in, and how you've set your calendar sharing settings in Salesforce.

In Salesforce, private event start and end times are visible to colleagues, but event details are hidden. All private event details are visible to Salesforce administrators who can view, edit, and report on events. You can choose to share more private event details with your colleagues by changing your calendar sharing level in your Personal Settings.

Your calendar application determines how private event details are shared with colleagues and supervisors from that product. Refer to that product documentation for more information.

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

If admins disable private event sync, your private events don't sync with the next sync cycle, and don't sync again. A version of each private event that was previously syncing remains in both Salesforce and your calendar until you delete one or both.

Important: Only admins can see how reps' private events are set up to sync, or know if the setting has changed. It's important that admins communicate which experience reps can expect so they can prepare their calendars accordingly—and keep Great Aunt Alberta's 95th birthday party out of Salesforce.

SEE ALSO:

What's the difference between private items in both Salesforce and Microsoft® Outlook®?

Person Account Sync

Learn how and when Lightning Sync syncs person account details between Google Contacts or Microsoft® contacts and Salesforce.

If you use person accounts, your admin can keep data on customers and prospects in sync between Salesforce and your Google or Microsoft contacts. That way, you no longer have to maintain contact records in two systems.

Here's how it works. If admins enable person accounts in Salesforce, your person accounts sync to with Google Contacts or with your Microsoft contacts.

If you're set up to sync person accounts both ways, from Google to Salesforce, or from Exchange to Salesforce, create person accounts in Salesforce only. That's because Google Contacts and Microsoft applications like Outlook don't have person accounts, so new contacts created from those applications sync to Salesforce as contacts instead. So creating person accounts from Salesforce only keeps your company's contact and prospect data neat and tidy for your colleagues.

EDITIONS

Available in: Salesforce Classic (not available in all orgs), Lightning Experience, and all versions of the Salesforce app

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

Event Delete

You can set up sales reps to delete events—from both their calendar and Salesforce—in one action. Salesforce admins can set up Lightning Sync so that when you delete a syncing event, its counterpart is removed from the other system automatically. Admins select this setting from reps' Lightning Sync configurations.

Keep in mind that the sync direction your admin has set and the system from which you deletes the event determines whether this setting deletes an events' counterpart. For example, if you're set up to sync events only from Microsoft or Google to Salesforce, this setting deletes both events in one action if you delete an event from your Microsoft or Google calendar. If you delete an event from Salesforce, the event's counterpart remains in your Microsoft or Google calendar.

This setting also automatically deletes events when you move an events' counterpart from your default calendar to a secondary calendar.

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Lightning Sync Considerations

Before you roll out Lightning Sync to your sales reps, familiarize yourself with these considerations.

Considerations for Syncing Events

Salesforce event descriptions are truncated to 8,192 characters after syncing with Google Calendar. This limit affects Lightning Sync for Google users who are set up to sync events either both ways or from Salesforce to Google only.

Considerations for Syncing Events from Your Calendar Application to Salesforce Only

Before Salesforce admins set up Lightning Sync, they can familiarize themselves with these considerations for syncing events from Google or Microsoft® to Salesforce only. That way, their rollout generates no surprises.

Considerations for Sync Directions

Before Salesforce admins set up Lightning Sync, they can familiarize themselves with these considerations for syncing events both ways, from Salesforce to Google, or from Salesforce to Exchange. That way, their rollout generates no surprises.

Considerations for Companies With Multiple Salesforce Organizations

If your company uses Lightning Sync in multiple Salesforce organizations, make sure the data in those organizations remains separate by being mindful about how you set up your Lightning Sync configurations.

SEE ALSO:

Considerations for Migrating from Salesforce for Outlook to Lightning for Outlook and Lightning Sync

Considerations for Syncing Events

Salesforce event descriptions are truncated to 8,192 characters after syncing with Google Calendar. This limit affects Lightning Sync for Google users who are set up to sync events either both ways or from Salesforce to Google only.

Considerations for Syncing Events from Your Calendar Application to Salesforce Only

Before Salesforce admins set up Lightning Sync, they can familiarize themselves with these considerations for syncing events from Google or Microsoft® to Salesforce only. That way, their rollout generates no surprises.

Admins decide whether Lightning Sync users sync events, and in which direction, by defining sync settings from Lightning Sync configurations in Setup.

When syncing from Microsoft or Google calendars to Salesforce only, there's potential for Lightning Sync to overwrite event data. To prevent such an occurrence, admins can be considerate about how they roll out Lightning Sync.

Admins can consider whether reps meet one or more of these scenarios.

- Reps are migrating reps from Salesforce for Outlook
- Reps edit their events records in Salesforce
- Reps already have access to Lightning for Outlook or Lightning for Gmail

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

For example, say that a rep maintains meeting notes in Salesforce event records. But the matching event in that rep's calendar doesn't include those notes. If reps are set up to sync from Microsoft or Google to Salesforce, Lightning Sync overwrites the event in Salesforce with the one from the calendar.

Admins can prevent reps' events from being overwritten by following our guidelines for syncing events from Microsoft or Google to Salesforce only.

Guidelines for Syncing Events in One Direction

Before Salesforce admins roll out Lightning Sync, admins can address these guidelines to avoid overwriting event data during certain sync scenarios.

Guidelines for Syncing Events in One Direction

Before Salesforce admins roll out Lightning Sync, admins can address these guidelines to avoid overwriting event data during certain sync scenarios.

If sales reps fall into one of the scenarios outlined in Considerations for Syncing Events from Your Calendar Application to Salesforce Only, admins can follow these guidelines to set up reps for Lightning Sync.

- In Lightning Sync configurations, don't change the default setting, TODAY, for the event sync filter. That way, edits that reps made to past events in Salesforce are excluded from the initial sync.
- We recommend that admins tell reps to edit event fields that sync (like date, time, subject, or description) in their calendars, and not in Salesforce. That way, Lightning Sync doesn't overwrite those edits in Salesforce. (Reps can continue to use Salesforce features that don't involve editing their Salesforce event fields, however, like relating events to Salesforce records.)

Considerations for Sync Directions

Before Salesforce admins set up Lightning Sync, they can familiarize themselves with these considerations for syncing events both ways, from Salesforce to Google, or from Salesforce to Exchange. That way, their rollout generates no surprises.

Available to sync with: Lightning Experience and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

Admins decide whether Lightning Sync users sync events, and in which direction, by defining sync settings from Lightning Sync configurations in Setup.

The options to sync events in both directions, from Salesforce to Google, or from Salesforce to Exchange are available only for reps who are using Lightning Experience, the Salesforce app, and (if syncing both ways) Microsoft Outlook® or Google Calendar™ to create or edit Salesforce events. Events created or edited from Salesforce Classic don't sync.

Setting up events to sync both ways, from Salesforce to Google, or from Salesforce to Exchange limits some calendar functionality in Salesforce Classic.

Reps can only view event attendees.

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

• Reps can add or remove attendees from Lightning Experience or the Salesforce app only.

Reps can't view or access the Multi-View Calendar.

SEE ALSO:

Event Attendees Sync

Considerations for Companies With Multiple Salesforce Organizations

If your company uses Lightning Sync in multiple Salesforce organizations, make sure the data in those organizations remains separate by being mindful about how you set up your Lightning Sync configurations.

You're using multiple organizations if you either:

- Test new features in a sandbox organization before setting up the feature in your live organization.
- Maintain separate Salesforce organizations for different divisions of your company.

To prevent Lightning Sync from syncing contacts and events between your Salesforce organizations, don't add the same user to Lightning Sync configurations in more than one organization.

We don't recommend marking a Lightning Sync configuration as inactive to prevent data from syncing between your Salesforce organizations. While marking a configuration as inactive prevents it from syncing a user's data, you risk forgetting that user is included in multiple Lightning Sync configurations, and marking the configuration as active later.



Example: You're testing Lightning Sync features in your sandbox organization, so you add user Marianne Schumacher to a Lightning Sync configuration in the sandbox organization. After you're satisfied with how you've set up Lightning Sync features for Marianne, you're ready to add her to a Lightning Sync configuration in your live organization.

Before you add Marianne to a Lightning Sync configuration in your live organization, remove her from the configuration in your sandbox organization. Otherwise, Lightning Sync can sync contacts and events between Marianne's email application, the sandbox organization, and the live organization, saving test and live data to all three data sources.

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

See the Big Picture for Setting Up Lightning Sync for Microsoft® Exchange

Salesforce admins can set up Lightning Sync so reps can sync contacts and events between Microsoft® Exchange and Salesforce. Salesforce admins and IT pros complete several steps, both on your Exchange server and in Salesforce.

Complete these steps to set up Lightning Sync for Microsoft Exchange.

1. Learn About Lightning Sync for Microsoft® Exchange Features

Keep your contacts and events in sync between your Microsoft® Exchange server and Salesforce without installing and maintaining software manually.

2. Choose and Configure a Method for Connecting to Microsoft® Exchange

Salesforce admins and IT pros can choose whether to connect Microsoft Exchange to Salesforce using an Exchange service account, or OAuth 2.0, and then set up that connection. Connecting using OAuth 2.0 requires a Microsoft Office 365° account.

3. Run the Lightning Sync Connection Test for Microsoft® Exchange Users

Salesforce admins can run the Lightning Sync connection test to confirm whether admins and IT pros have set up Lightning Sync successfully. Or, run the connection test if Lightning Sync was syncing reps' items successfully, but suddenly stops.

4. Tell Reps How to Prevent Certain Microsoft® Outlook Calendar Events from Syncing to Salesforce Salesforce admins should tell reps how to manage which of their Outlook calendar events sync with Salesforce. We recommend that reps prepare events that they don't want to sync before admins kick off the sync process. However, reps can manage which events sync at any time.

- 5. Get Ready to Sync Events with Lightning Sync for Microsoft® Exchange
 You can choose which events sync from your Microsoft calendar application to Salesforce.
- 6. Define Lightning Sync for Microsoft® Exchange Settings for Reps

After reps prepare their Exchange events to sync with Salesforce, admins can define sync settings for groups of reps in Lightning Sync configurations. This step kicks off the sync process, and determines how reps contacts and events sync between applications.

7. Tell Reps How to Sync Microsoft® Contacts with Salesforce

Salesforce admins should tell their reps using Lightning Sync for Microsoft Exchange that it's time to manage the Microsoft contacts that users want to sync with Salesforce.

8. Get Ready to Sync Contacts with Lightning Sync for Microsoft® Exchange

Learn how to sync contacts between your company's email application and Salesforce using Lightning Sync.

SEE ALSO:

Learn About Lightning Sync for Microsoft® Exchange Features Lightning Sync Trailblazer Community

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

USER PERMISSIONS

To prepare your Exchange server to communicate with Salesforce:

 Administrative access to your company's Microsoft[®] Exchange server

To access and edit Lightning Sync Setup

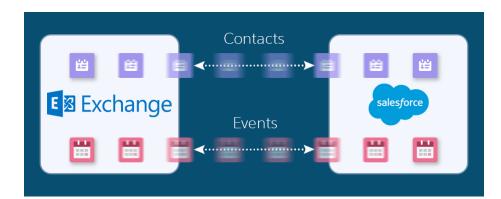
 Customize Application AND Manage Users AND Manage Lightning Sync

Learn About Lightning Sync for Microsoft® Exchange Features

Keep your contacts and events in sync between your Microsoft® Exchange server and Salesforce without installing and maintaining software manually.

When your contacts and events sync between your company's Microsoft[®] Exchange server and Salesforce, you increase your productivity. That's because there's no need to duplicate your work between the two systems. Plus, Lightning Sync syncs items whether you're working from your desk or from your mobile device using the Salesforce app.

Salesforce admins define reps' experience by selecting sync settings from Salesforce. For example, admins can choose whether both contacts and events sync, or whether only contacts or only events sync. Admins can also decide which direction your items sync: between Salesforce and your Microsoft Exchange server, or just one way. Ask your admin for details.



EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

Admins can also decide how Microsoft events sync to Salesforce. Admins can set up reps to sync all their events, or only the events reps select.

If you're set up to sync only the events you select, you can choose which Microsoft events sync using Lightning for Outlook. Lightning for Outlook is a Microsoft integration product that lets you experience Salesforce features directly from Microsoft Outlook.

Admins can select more settings to define your sync experience. Ask your administer about how you're set up to sync in these cases:

- Are you syncing private events?
- Are syncing events that you delete in one system automatically removed from the other system?
- Are your events automatically related to relevant Salesforce contacts, or one relevant lead?

Lightning Sync for Microsoft Exchange Limitations

Currently, Lightning Sync doesn't:

- Sync recurring events.
- Sync Tasks. Set up Lightning for Outlook to let users work with Salesforce tasks from Outlook.
- Delete syncing contacts in one action.

For limitations from user to user, see Lightning Sync Considerations.

SEE ALSO:

Lightning for Outlook

Help Sales Reps Sync Contacts and Events with Lightning Sync (Admin Guide)

Sync Your Contacts and Events with Lightning Sync (User Guide)

Choose and Configure a Method for Connecting to Microsoft® Exchange

Salesforce admins and IT pros can choose whether to connect Microsoft Exchange to Salesforce using an Exchange service account, or OAuth 2.0, and then set up that connection. Connecting using OAuth 2.0 requires a Microsoft Office 365° account.

Connect Salesforce and Microsoft® Exchange Using an Exchange Service Account

To connect Salesforce to your company's Microsoft Exchange server using a service account, you and your Exchange administrator have to complete several steps, both from Salesforce and from your Exchange server.

Connect Salesforce and Microsoft® Exchange Using OAuth 2.0

Give Salesforce access to Microsoft Exchange Online using OAuth 2.0. To complete setup, you need a Microsoft Office 365° account and help from your Office 365 global administrator to provide credentials for your company's account.

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Connect Salesforce and Microsoft® Exchange Using an Exchange Service Account

To connect Salesforce to your company's Microsoft Exchange server using a service account, you and your Exchange administrator have to complete several steps, both from Salesforce and from your Exchange server.

Prepare Your Microsoft® Exchange Server for Lightning Sync The first step in setting up Lightning Sync is to enable several settings on your Exchange server, including Exchange Web Services, Exchange Autodiscover Service, and Basic authentication.

- 2. Set Up a Microsoft® Exchange Service Account to Communicate with Lightning Sync After you've enabled the right settings on your Exchange server, create an Exchange service account with impersonation rights for the mailbox of each Lightning Sync user.
- 3. Run the Microsoft® Remote Connectivity Analyzer with Lightning Sync Parameters
 Salesforce admins can run the Remote Connectivity Analyzer—the free web-based tool provided
 by Microsoft—to confirm whether Salesforce admins and their Exchange admins have set up
 Lightning Sync for Microsoft Exchange successfully. Or, admins can run the Remote Connectivity
 Analyzer if Lightning Sync for Microsoft Exchange was syncing reps' items successfully, but
 suddenly stops. Use the parameters provided to run the test for Lightning Sync.
- 4. Set Up Salesforce to Communicate with Microsoft® Exchange Using a Service Account After running the Remote Connectivity Analyzer, log in to Salesforce to enable Lightning Sync for Microsoft Exchange and provide your service account credentials.

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

USER PERMISSIONS

To set up a service account to communicate with Lightning Sync:

 Administrative access to your company's Exchange server

To access and edit Lightning Sync Setup

Prepare Your Microsoft® Exchange Server for Lightning Sync

The first step in setting up Lightning Sync is to enable several settings on your Exchange server, including Exchange Web Services, Exchange Autodiscover Service, and Basic authentication.

These instructions vary depending on the version of Microsoft® Exchange your company uses. For more support, visit Microsoft's support website, search for the keywords mentioned here, and follow the instructions intended for your Exchange version.

Complete the following steps on your Exchange server.

- 1. Enable Exchange Web Services (EWS) on an SSL connection.
 - Make sure your Exchange server has a signed certificate from one of the Salesforce-approved Certificate Authorities.
 - If your organization has configured a firewall, allow an inbound connection to your Exchange client access server on port 443.
- 2. Enable Exchange Autodiscover Service.
- **3.** Enable Basic authentication on both your Exchange server and your Autodiscover service. If you need to run additional authentication methods (such as Microsoft NTLM), there is no need to disable those methods; you can run Lightning Sync without conflict.

Set Up a Microsoft® Exchange Service Account to Communicate with Lightning Sync

After you've enabled the right settings on your Exchange server, create an Exchange service account with impersonation rights for the mailbox of each Lightning Sync user.

Before setting up an Exchange Service account, make sure you've enabled the appropriate Exchange server settings to set up Lightning Sync.

To set up an Exchange service account, work with your Exchange admin to complete these steps on your Exchange server.

Watch a Demo:

- Set Up a Microsoft[®] Exchange Service Account to Sync with Salesforce (for administrators using Office 365[™] Admin Center) (English only)
- Set Up a Microsoft® Exchange Service Account to Sync with Salesforce (for administrators using command shell) (English only)
- Note: For more support, visit Microsoft®'s support website, search for the keywords mentioned here, and follow the instructions intended for your Exchange version.
- 1. Create an Exchange user with a mailbox that acts as the service account. You use this email address later to configure Exchange impersonation for the service account.
- 2. Using Exchange Management Shell, enter the commands that enable service account impersonation for your version of Exchange. If you receive a pipeline error message, wait a few minutes and reenter the command to let your server process the requests.
 - If you're using Exchange 2013:

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

USER PERMISSIONS

To set up a service account to communicate with Lightning Sync:

 Administrative access to your company's Exchange server

a. Enable the Active Directory extended permission for ms-Exch-EPI-Impersonation on all Client Access servers.

b. Enable the Active Directory extended rights for ms-Exch-EPI-May-Impersonate to let your service account impersonate all accounts on your Exchange server. Set a filter later that lets you limit the users the service account syncs with Salesforce.

```
Get-MailboxDatabase | ForEach-Object {Add-ADPermission -Identity $_.distinguishedname
  -User <*EnterExchangeSyncServiceAccountAddress> -ExtendedRights
  ms-Exch-EPI-May-Impersonate}
```

- If you're using Exchange Online offered by Microsoft Office 365[™]:
- **a.** Enable customization on your Exchange server.

```
Enable-OrganizationCustomization
```

- **3.** Using Exchange Management Shell, enter these commands to configure your service account to impersonate the group of users who'll sync with Lightning Sync.
 - a. Create a management scope to define a filter that groups the Exchange users who sync with Lightning Sync. For example, if you want only sales reps to sync, and their Exchange mailboxes all have the same value Sales for the filterable property Department, enter Department -eq 'Sales' in place of <ChooseRecipientFilter>.

```
New-ManagementScope -Name: <ChooseExchangeSyncScopeName>
-RecipientRestrictionFilter: { <ChooseRecipientFilter>}
```

b. Create a management role assignment that restricts the service account to impersonate only the users you defined in the management scope.

```
New-ManagementRoleAssignment -Name: <a href="https://www.news.com/chooseExchangeSyncRoleAssignmentName">https://www.news.com/chooseExchangeSyncRoleAssignmentName</a> -Role: ApplicationImpersonation -User: <a href="https://www.news.com/chooseExchangeSyncServiceAccountAddress">https://www.news.com/chooseExchangeSyncServiceAccountAddress</a> -CustomRecipientWriteScope: <a href="https://www.news.com/chooseExchangeSyncServiceAccountAddress">https://www.news.com/chooseExchangeSyncServiceAccountAddress</a> -Role: <a href="https://www
```

Run the Microsoft® Remote Connectivity Analyzer with Lightning Sync Parameters

Salesforce admins can run the Remote Connectivity Analyzer—the free web-based tool provided by Microsoft—to confirm whether Salesforce admins and their Exchange admins have set up Lightning Sync for Microsoft Exchange successfully. Or, admins can run the Remote Connectivity Analyzer if Lightning Sync for Microsoft Exchange was syncing reps' items successfully, but suddenly stops. Use the parameters provided to run the test for Lightning Sync.

Before you run the Remote Connectivity Analyzer, make sure that you've selected your preferred connection method so that Exchange and Salesforce can communicate. Wait a few minutes after completing those tasks to let your Exchange server process the changes you've made. Otherwise, the Remote Connectivity Analyzer can show a failed test summary, even though you've configured setup correctly.

The Remote Connectivity Analyzer checks several points of connectivity between your Salesforce organization and your Exchange server. When the test is complete, Microsoft provides a summary describing your connection status.



Note: The Microsoft Remote Connectivity Test and the Lightning Sync Connection Test check general connectivity between your email server and your Salesforce organization. If you want to test connectivity for only one (or a few) of your reps, check their sync statuses from Lightning Sync Status in Setup.

- 1. Visit Microsoft's website and search for the Remote Connectivity Analyzer.
- 2. On the Exchange Server tab, select Service Account Access (Developers).
- 3. Click Next.
- 4. Complete the test fields:

| For this test field | Type this parameter |
|---|--|
| Target mailbox email address | The email address of a sales rep you've set up to be impersonated by your Lightning Sync service account |
| Service Account User Name (Domain\User Name or UPN) | The service account domain\user name or UPN you've set up for Lightning Sync |
| Service Account Password | The service account password you've set up for Lightning Sync |

- 5. Select Use Autodiscover to detect server settings.
- 6. Select Test predefined folder.
- 7. Choose Contacts if you'd like to test sync connectivity for this user's contacts, or Calendar for this user's events.
- 8. Check Use Exchange Impersonation.
- **9.** In the Impersonated User field, type the same Exchange email address you specified for Target mailbox email address.
- 10. For Impersonated user identifier, select SMTP Address.
- 11. Check the I understand that I must use the credentials of a working account... acknowledgment.
- 12. Type the analyzer verification code and click verify.

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

USER PERMISSIONS

To get the necessary parameters to run the test:

 Administrative access to your company's Microsoft[®] Exchange server

- **13.** At the top of the page, click **Perform Test**.
 - Running the test usually takes less than 30 seconds. When the test is complete, the analyzer displays a summary evaluating the sync connectivity for the Exchange user you've specified.
- 14. Take action based on the test results.
 - If the test summary displays "Connectivity Test Successful" or "Connectivity Test Successful with Warnings," it's likely that you've set up your service account correctly, and you're ready to provide your service account credentials to Salesforce.
 - If the test summary displays "Connectivity Test Failed," review the test details to troubleshoot setup issues. If the test continues to fail, verify that you've completed the previous setup steps correctly and then contact Salesforce Customer Support for help.

SEE ALSO:

Check Lightning Sync Users' Sync Statuses
Run the Lightning Sync Connection Test for Microsoft® Exchange Users

Set Up Salesforce to Communicate with Microsoft® Exchange Using a Service Account

After running the Remote Connectivity Analyzer, log in to Salesforce to enable Lightning Sync for Microsoft Exchange and provide your service account credentials.

- 1. From Salesforce Setup, enter <code>Sync</code> in the <code>Quick Find</code> box, then select **Lightning for Outlook and Sync**.
- 2. Select Let users sync contacts, events, or both between Microsoft Exchange and Salesforce to enable Lightning Sync.
- **3.** Click Let users sync contacts, events, or both between Microsoft Exchange and Salesforce to see additional setup steps.
- **4.** Select **Service Account** as your preferred connection method.
- **5.** Enter the service account user name you created in Exchange, including your company's domain and top-level domain. For example, if you work for AW Computing, and the service account mailbox you've created is svcacct@awcomputing.com, enter your user name in either of these formats:
 - svcacct@awcomputing.com
 - awcomputing.com\svcacct

Some network configurations require one format rather than the other. If your first attempt to get Salesforce and Exchange to communicate is unsuccessful, try the other format.

- **6.** Enter your service account password.
- 7. If your sales reps' email domains are different than your service account domain, enter the additional domains in a comma-separated list. For example, if your service account is svcacct@awcomputing.com, but your reps' email addresses are in the domain awcomputing.net, enter awcomputing.net as an additional domain so Lightning Sync can recognize it.
- 8. Click Save.

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

USER PERMISSIONS

To access Lightning Sync setup in Salesforce:

Connect Salesforce and Microsoft® Exchange Using OAuth 2.0

Give Salesforce access to Microsoft Exchange Online using OAuth 2.0. To complete setup, you need a Microsoft Office 365° account and help from your Office 365 global administrator to provide credentials for your company's account.

- From Setup, enter Sync in the Quick Find box, then select Lightning for Outlook and Sync.
- 2. Select Let users sync contacts, events, or both between Microsoft Exchange and Salesforce to enable Lightning Sync.
- **3.** Click Let users sync contacts, events, or both between Microsoft Exchange and Salesforce to see additional setup steps.
- **4.** Select **OAuth 2.0** as your preferred connection method.
- **5.** Have your Office 365 global administrator log in to your Office 365 account.
- **6.** When the Microsoft Azure[™] login page opens, accept Lightning Sync access to your account by following the prompts until you're directed back to Salesforce.
- 7. From Salesforce, under Provide your Office 365 ID, click **Connect**.

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

USER PERMISSIONS

To access and edit Lightning Sync Setup

Customize Application

To prepare Exchange Online to communicate with Salesforce:

 Global administrator access to your company's Office 365 account

Run the Lightning Sync Connection Test for Microsoft® Exchange Users

Salesforce admins can run the Lightning Sync connection test to confirm whether admins and IT pros have set up Lightning Sync successfully. Or, run the connection test if Lightning Sync was syncing reps' items successfully, but suddenly stops.

After taking the necessary steps to prepare your Microsoft Exchange server and Salesforce to sync, you're ready to run the Lightning Sync connection test.

The Lightning Sync connection test checks several points of connectivity between Salesforce and your email server. When the test is complete, it provides a summary describing your connection status.

Salesforce Admins setting up Lightning Sync for Microsoft® Exchange should run both the Lightning Sync connection test and the Microsoft Remote Connectivity Analyzer to test their connectivity between their servers and Salesforce. The tests differ slightly, so running both gives admins more information about the connection status. Admins setting up Lightning Sync for Google need only run the Lightning Sync connection test.

The Microsoft Remote Connectivity Test and the Lightning Sync Connection Test check general connectivity between your email server and your Salesforce organization. If you want to test connectivity for only one (or a few) of your reps, check their sync statuses from Lightning Sync Status in Setup.

- 1. From Setup, enter *Sync* in the Quick Find box, then select **Lightning for Outlook and Sync**.
- **2.** Under Test your connection, provide the email address for one of the reps you've set up to sync on your email server.
- 3. Click Test.

Lightning Sync checks the connection between Salesforce and your email server and summarizes your connection status.

SEE ALSO:

Check Lightning Sync Users' Sync Statuses
Run the Microsoft® Remote Connectivity Analyzer with Lightning Sync Parameters

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

USER PERMISSIONS

To run the connection test:

Tell Reps How to Prevent Certain Microsoft® Outlook Calendar Events from Syncing to Salesforce

Salesforce admins should tell reps how to manage which of their Outlook calendar events sync with Salesforce. We recommend that reps prepare events that they don't want to sync before admins kick off the sync process. However, reps can manage which events sync at any time.

Reps can prevent some of their calendar events—like personal events—from syncing to Salesforce.

Later in the setup process, admins have to define reps' sync settings in Lightning Sync configurations. If admins define sync settings for events, all events from a rep's default calendar sync to Salesforce—unless admins tell reps to manage those events now.

Reps can prevent personal events from syncing from their calendars to Salesforce in different ways.

- Reps can create a separate calendar in their calendar application to track personal events. (Lightning Sync is designed to sync only a reps' default calendar to Salesforce.)
- When admins define sync settings in Lightning Sync configurations, admins choose whether to sync reps' private events. If admins opt not to sync private events, reps can prevent events from syncing by assigning the private option to events from their calendar applications.

If reps don't manage their personal events before syncing begins, reps can still remove those events from Salesforce by deleting personal events Salesforce manually.

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

Get Ready to Sync Events with Lightning Sync for Microsoft® Exchange

You can choose which events sync from your Microsoft calendar application to Salesforce.

If your administrator has set up Lightning Sync for Microsoft Exchange, your events sync automatically from your Microsoft calendar to Salesforce. Events sync from your calendar to Salesforce every few minutes. If you've got many events, your first sync could take some time.

To understand how to manage your events, ask your admin whether you're set up to sync events in one direction or in both directions. Also ask whether you're set up to sync private events.

Manage Events Syncing in One Direction

Create and edit events that you want to sync from your Microsoft calendar.

Manage Events Syncing in Both Directions

To make sure your events stay in sync, create and edit events from your Microsoft calendar, Lightning Experience, or the Salesforce app. Events created or edited from Salesforce Classic don't sync with your Microsoft calendar.

Prevent Personal Events from Syncing

You can prevent personal events from syncing with Salesforce in different ways.

- Create a separate calendar in your calendar application to keep track of your personal events.
 Lightning Sync is designed to sync only your primary Microsoft® Exchange calendar to Salesforce.
- Ask your admin if your sync configuration is set up to sync private events. If you're not syncing private events, you can assign your personal events with the Private option from your calendar application, and those events won't sync with Salesforce.

For example, you can mark an event as private from Microsoft Outlook® like this.

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

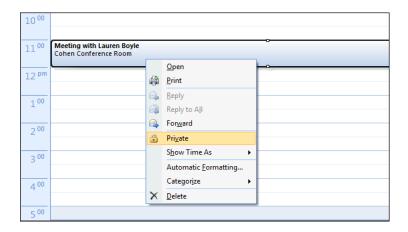
Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

USER PERMISSIONS

To sync events from your calendar to Salesforce:

 Create on events, AND An active Lightning Sync configuration



Define Lightning Sync for Microsoft® Exchange Settings for Reps

After reps prepare their Exchange events to sync with Salesforce, admins can define sync settings for groups of reps in Lightning Sync configurations. This step kicks off the sync process, and determines how reps contacts and events sync between applications.

Before admins roll out Lightning Sync to reps, admins can familiarize themselves with our Lightning Sync Considerations. There's potential for Lightning Sync to overwrite data or sync data between Salesforce orgs unless admins are considerate about how they roll out the product.

Defining sync settings lets admins define how their reps sync. Admins can decide:

- Which reps sync
- Whether contacts, events, or both items sync
- Which direction items sync
- To create filters to limit certain contacts or events from syncing
- Whether reps' private events sync
- Whether all events sync, or only events that users relate to Salesforce records using Lightning for Outlook
- Whether syncing events that reps delete in one system are automatically removed from the other system
- Whether important events are automatically related to the appropriate Salesforce contacts or lead
- From Setup, enter Sync in the Quick Find box, then select Lightning for Outlook and Sync.
- 2. Click Let users sync contacts, events, or both between Microsoft Exchange and Salesforce to see additional setup steps.
- **3.** From the Set Sync Settings and Check Status section, click **New Config**.
- 4. Click New Lightning Sync Configuration.

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

USER PERMISSIONS

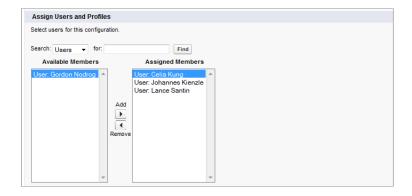
To access Lightning Sync setup:



5. Enter the name of the configuration. For example, if you're creating a configuration for users in a particular region, enter a unique name for it, and then select Active.



6. Assign users and profiles to this configuration.



- 7. Indicate the sync direction for your users' contacts or person accounts.
- 8. To change field mappings between Salesforce and Exchange contacts, click Edit Field Mappings.
- **9.** Indicate the sync direction for your users' events.
- 10. Indicate whether you want all Exchange events to sync to Salesforce, or only the events that your users select. If you set up users to select events, events users relate to Salesforce from Lightning for Outlook start syncing from Microsoft Outlook to Salesforce. To finish setting up that option, you're required to enable Lightning for Outlook, and your users are required to complete Lightning for Outlook setup.



- 11. To change field mappings between Salesforce and Exchange events, click Edit Field Mappings.
- 12. Click Save.
- **13.** Set filters to specify the contacts users can sync from Salesforce to Exchange. You are required to set filters based on your users' record ownership. Choose whether you want to:
 - Limit contacts that users sync to only what users own, choose **Selected Contacts**, and then select **User's Records**. Make sure that you select both of these settings together, or no contacts sync for users in this configuration.
 - Let users sync all contacts they can see in Salesforce, choose All Contacts.



Set more sync filters, if you wish. For example, to prevent contacts from outside your users' territories from syncing, create sync filters for specific fields on users' contact records. Contact filters don't apply to contacts syncing from Exchange to Salesforce.



- 14. Select Sync private events to sync events your users have marked private either in Salesforce or their calendars.
- 15. Select Delete synced events to let reps delete Exchange events and Salesforce events in one action.
- **16.** Select Automatically relate Exchange events to Salesforce records to let Lightning Syncreview reps' calendars and intelligently relate important events to the appropriate Salesforce contacts or leads automatically.
- **17.** Specify the specific events users can sync from Exchange to Salesforce. Enter a filter in the Greater or equal to field. Doing so limits the events users can sync to these time frames.
 - TODAY—Syncs events that end on or after today. The start time is 12:00 a.m. Learn more on page 63 about why this selection is recommended in certain scenarios.
 - LAST MONTH—Syncs events that ended on or after the first day of last month.
 - LAST N DAYS—Syncs events that ended on or after a specified number of days ago, such as LAST 30 DAYS. You can sync events that ended up to 180 days ago.

18. Click Save.

Syncing has begun for users in this Lightning Sync configuration.

SEE ALSO:

How Lightning Sync Manages Sync Conflicts with Salesforce for Outlook Considerations for Companies With Multiple Salesforce Organizations

Tell Reps How to Sync Microsoft® Contacts with Salesforce

Salesforce admins should tell their reps using Lightning Sync for Microsoft Exchange that it's time to manage the Microsoft contacts that users want to sync with Salesforce.

If you've set up sales reps to sync contacts from only Salesforce to Microsoft Exchange, you can skip this step: Reps' contacts and events are already syncing.

Reps set up to sync contacts from Exchange to Salesforce or sync both ways can kick off sync by choosing which Microsoft contacts sync to Salesforce.

After you define reps' sync settings by adding them to active Lightning Sync configurations, Lightning Sync creates a folder called Salesforce_Sync within each reps' email account. Lightning Sync nests Salesforce_Sync within reps' Contacts directories.

Reps choose which contacts sync by moving those contacts into the Salesforce_Sync folder. When reps can see and access the Salesforce_Sync folder in their email application, they can start moving contacts into it.

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

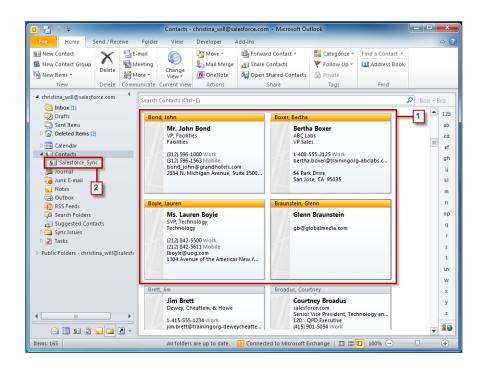
Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

Get Ready to Sync Contacts with Lightning Sync for Microsoft® Exchange

Learn how to sync contacts between your company's email application and Salesforce using Lightning Sync.

After your administrator initiates contacts sync for you, Lightning Sync creates a folder in your email application called Salesforce_Sync. You can find the Salesforce_Sync folder under your contacts directory. Any contacts that have synced from Salesforce to your email application are in Salesforce_Sync. Don't rename, move, or delete the Salesforce_Sync folder, or syncing between Salesforce and your email application stops.

- 1. Ask your administrator which direction you're set up to sync.
 - If you're set up to sync from Salesforce to your email application only, syncing is already in progress, and you don't have to do anything else. Soon you can access your Salesforce contacts directly from your email application.
 - If you're set up to sync from your email to Salesforce or to sync both ways, it's time to move the contacts that you want to sync into the Salesforce Sync folder.
- 2. In your email application, select the contacts you want to sync. You can select multiple contacts at a time.



3. Move—do not copy—your selected contacts to the folder Salesforce_Sync. If you copy your contacts, you get duplicates, which are a hassle!

The contacts you move to the Salesforce_Sync folder begin to sync every few minutes. If you move numerous contacts to Salesforce Sync, your first sync can take some time.

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

USER PERMISSIONS

To sync contacts both ways:

 Read and Edit on contacts, and Read on accounts, AND contact sync direction set to Sync both ways in Lightning Sync configurations

To sync contacts from Salesforce to Exchange:

 Read on contacts, AND contact sync direction set to Salesforce to Exchange in Lightning Sync configurations

To sync contacts from Exchange to Salesforce:

 Create on contacts, AND contact sync direction set to Exchange to Salesforce in Lightning Sync configurations

See the Big Picture for Setting Up Lightning Sync for Google

Salesforce admins can set up Lightning Sync so reps can sync contacts and events between your company's G Suite account and Salesforce. Salesforce admins and IT pros complete several steps, both from your company's G Suite account and from Salesforce.

Complete these steps to set up Lightning Sync for Google.

1. Learn About Lightning Sync for Google Features

Keep contacts and events in sync between your Google applications and Salesforce. Lightning Sync for Google requires a G Suite account.

2. Prepare Your G Suite Account for Lightning Sync

The IT pros or Google administrator at your company can prepare Google servers to communicate with Salesforce. Your Google admin can complete these steps by logging in to your company's Google API Console and Google Admin Console.

3. Prepare Salesforce for Lightning Sync for Google

After an IT pro or Google administrator has prepared your Google for Work account for Lightning Sync, complete the necessary steps to prepare Salesforce, too. From Salesforce, first register the Google API site. Then, select settings to connect the applications using OAuth 2.0 for Google.

4. Run the Lightning Sync Connection Test for Google Users

Run the Lightning Sync connection test to confirm whether you and your IT pros have set up Lightning Sync successfully. Or, run the connection test if Lightning Sync was syncing your reps' items successfully, but suddenly stops.

5. Tell Sales Reps How to Prevent Certain Google Calendar Events from Syncing to Salesforce Tell your Lightning Sync users how to manage which of their calendar events sync with Salesforce. We recommend that sales reps prepare events that they don't want to sync before you kick off the sync process. However, reps can manage which events sync at anytime.

6. Get Ready to Sync Events with Lightning Sync for Google

Choose which events sync from Google Calendar[™] to Salesforce when your Salesforce admin sets you up to use Lightning Sync for Google.

7. Define Lightning Sync for Google Settings for Reps

After reps prepare their Google Calendar[™] events to sync with Salesforce, admins can define sync settings for groups of reps in Lightning Sync configurations. This step kicks off the sync process for reps, and determines how their contacts and events sync between the two systems.

8. Get Ready to Sync Contacts with Lightning Sync for Google

Learn how to sync contacts between Google Contacts and Salesforce when you're set up to use Lightning Sync for Google.

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

USER PERMISSIONS

To prepare your G Suite account to communicate with Salesforce:

 The Owner role on your company's G Sutie account, which gives you administrative permissions

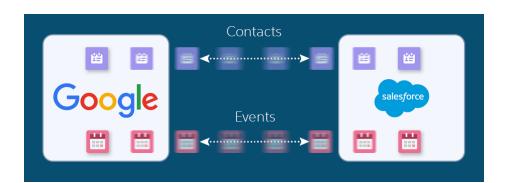
To access and edit Lightning Sync Setup

Learn About Lightning Sync for Google Features

Keep contacts and events in sync between your Google applications and Salesforce. Lightning Sync for Google requires a G Suite account.

When you sync contacts and events between your Google applications and Salesforce, you increase your productivity. That's because there's no need to duplicate work between the two applications. Plus, Lightning Sync syncs items whether you're working from your desk or from your mobile device using the Salesforce app.

Salesforce admins define reps' experience by selecting sync settings from Salesforce. For example, admins can choose whether both contacts and events sync, or whether only contacts or only events sync. Admins can also decide which direction your items sync: between Salesforce and your Google account, or just one way. Ask your admin for details.



EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and tbe Salesforce app

Available to set up from: both Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

Admins can also decide whether you sync only the events you select. In that case, you choose which Google events sync using Lightning for Gmail. Lightning for Gmail is a Google integration product that lets you experience Salesforce features directly from Google applications like Google Contacts, $Gmail^{\mathsf{TM}}$, and $Gmail^{\mathsf{TM}}$.

Admins can select more settings to define your sync experience. Ask your administer about how you're set up to sync in these cases:

- Are you syncing private events?
- Are events you delete from your calendar automatically removed from Salesforce?
- Are your events automatically related to relevant Salesforce contacts, or one relevant lead?

Lightning Sync for Google Limitations

Keep in mind that for now, Lightning Sync for Google doesn't:

- Sync recurring events
- Delete syncing contacts in one action
- Let you edit which Google contact and event fields map to Salesforce contact and events fields

For limitations from user to user, see Lightning Sync Considerations.

SEE ALSO:

Get Ready to Sync Events with Lightning Sync for Microsoft® Exchange My Unresolved Items

Prepare Your G Suite Account for Lightning Sync

The IT pros or Google administrator at your company can prepare Google servers to communicate with Salesforce. Your Google admin can complete these steps by logging in to your company's Google API Console and Google Admin Console.

For more support, refer to Google developer documentation.

- 1. Complete these steps from Google API Console.
 - **a.** Create a Google project dedicated to Lightning Sync.
 - **b.** From the new project, to set up reps to sync events, enable Google Calendar[™] API.
 - **c.** From the new project, to set up reps to sync contacts, enable Google Contacts API.
 - **d.** Create credentials for a service account with the role *Project Owner* and the key type *JSON*.
 - **e.** Enable Domain-Wide Delegation for the service account. Doing so generates a Client ID (also known as Client name) for the service account, which you need later.
 - **f.** Save the JSON private key from your service account in a secure location and share it with your Salesforce admin. (But only your Salesforce admin.)
 - (1) Important: Let's consider your private key the "key to the Google Calendar castle." People in possession of the key have access to your company's Google account. Therefore, only share the key with team members who need it, and share it via secure pathways. For example, emailing your key probably isn't a good idea.
- 2. Complete these steps from Google Admin Console.
 - **a.** Navigate to your security settings, select the advanced section, and click **Manage API client access**.
 - **b.** Authorize read-write calendar access for the service account. Enter the service account Client ID (also known as Client name) that you generated in Google API Console. Enter the scope: https://www.googleapis.com/auth/calendar
 If you like, you can authorize other scopes, but this scope is required.

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

USER PERMISSIONS

To prepare your G Suite account to communicate with Salesforce:

 The Owner role on your company's G Suite account, which gives you administrative permissions

- Tip: If you didn't retain your Client ID (also known as Client name) from Google API Console, you can locate it within your service account private key.
- c. Authorize read-only contact scope for the service account by entering the service account Client ID (also known as Client name) you generated in Google API Console. Enter these scopes:
 https://www.googleapis.com/auth/contacts.readonly and https://www.google.com/m8/feeds
 If you like, you can authorize other scopes, but this scope is required.

When you're finished, Salesforce admins can take the next steps by preparing Salesforce for Lightning Sync.

Prepare Salesforce for Lightning Sync for Google

After an IT pro or Google administrator has prepared your Google for Work account for Lightning Sync, complete the necessary steps to prepare Salesforce, too. From Salesforce, first register the Google API site. Then, select settings to connect the applications using OAuth 2.0 for Google.

Before preparing Salesforce for Lightning Sync, make sure that you've taken the necessary steps to prepare your company's Google for Work account to communicate with Salesforce.

- 1. From Setup, Register a new remote site for https://www.googleapis.com. Don't disable protocol security for the site, or Salesforce can't connect with Google.
- 2. From Setup, enter <code>Sync</code> in the <code>Quick Find</code> box, then select Lightning for Gmail and Sync.
- **3.** Select **Let users sync contacts, events, or both between Google and Salesforce** to enable Lightning Sync.
- **4.** Click **Let users sync contacts, events, or both between Google and Salesforce** to see additional setup steps.
- **5.** Select **OAuth 2.0** as your preferred connection method.
- **6.** Upload the private key for your Google service account. Your Google admin generated the key when setting up the service account for Lightning Sync.
 - Important: Let's consider your private key the "key to the Google Calendar castle." People in possession of the key have access to your company's Google account. Therefore, only share the key with team members who need it, and share it via secure pathways. For example, emailing your key probably isn't a good idea.

When you're finished, run the Lightning Sync connection test to make sure that you've set up your connection correctly.

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

USER PERMISSIONS

To access and edit Lightning Sync Setup

Run the Lightning Sync Connection Test for Google Users

Run the Lightning Sync connection test to confirm whether you and your IT pros have set up Lightning Sync successfully. Or, run the connection test if Lightning Sync was syncing your reps' items successfully, but suddenly stops.

After taking the necessary steps to prepare your G Suite account and Salesforce to sync, you're ready to run the Lightning Sync connection test.

The Lightning Sync connection test checks several points of connectivity between Salesforce and your email server. When the test is complete, it provides a summary describing your connection status.

- From Setup, enter Sync in the Quick Find box, then select Lightning for Gmail and Sync.
- **2.** Click **Let users sync contacts, events, or both between Google and Salesforce** to see additional setup steps.
- **3.** Under Test your connection, provide the email address for one of the reps you've set up to sync on your email server.
- 4. Click Test.

Lightning Sync checks the connection between Salesforce and your email server and summarizes your connection status.

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

USER PERMISSIONS

To run the connection test:

Customize Application AND Manage Users AND Manage Lightning Sync

Tell Sales Reps How to Prevent Certain Google Calendar Events from Syncing to Salesforce

Tell your Lightning Sync users how to manage which of their calendar events sync with Salesforce. We recommend that sales reps prepare events that they don't want to sync before you kick off the sync process. However, reps can manage which events sync at anytime.

Reps can prevent some of their calendar events—like personal events—from syncing to Salesforce.

Later in the setup process, admins have to define reps' sync settings in Lightning Sync configurations. If admins define sync settings for events, all events from a rep's default calendar sync to Salesforce—unless admins tell reps to manage those events now.

Reps can prevent personal events from syncing from their calendars to Salesforce in different ways.

- Reps can create a separate calendar in their calendar application to track personal events. (Lightning Sync is designed to sync only a reps' default calendar to Salesforce.)
- When admins define sync settings in Lightning Sync configurations, admins choose whether
 to sync reps' private events. If admins opt not to sync private events, reps can prevent events
 from syncing by assigning the private option to events from their calendar applications.

If reps don't manage their personal events before syncing begins, reps can still remove those events from Salesforce by deleting personal events Salesforce manually.

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

Get Ready to Sync Events with Lightning Sync for Google

Choose which events sync from Google Calendar[™] to Salesforce when your Salesforce admin sets you up to use Lightning Sync for Google.

If your administrator has set up Lightning Sync for Google, your events sync automatically from Google Calendar to Salesforce. Events sync from your calendar to Salesforce every few minutes. If you've got many events, your first sync could take some time.

To understand how to manage your events, ask your admin whether you're set up to sync events in one direction or in both directions. Also ask whether you're set up to sync private events.

Manage Events Syncing in One Direction

Create and edit events that you want to sync from Google Calendar.

Manage Events Syncing in Both Directions

To make sure your events stay in sync, create and edit events from Google Calendar, Lightning Experience, or the Salesforce app. Events created or edited from Salesforce Classic don't sync with Google.

EDITIONS

Available to sync with: Salesforce Classic, Lightning Experience, and the Salesforce app

Available to set up from: Salesforce Classic and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

Prevent Personal Events from Syncing

You can prevent personal events from syncing with Salesforce in different ways.

- Track your personal events on a separate calendar in your calendar application. Lightning Sync is designed to sync only your primary Google Calendar to Salesforce.
- Ask your admin if your sync configuration is set up to sync private events. If you're not syncing private events, you can assign your personal events with the Private option from Google calendar, and those events don't sync with Salesforce.

It's best if you manage the events you don't want to sync before your administrator initiates sync for the first time. If your events begin syncing before you manage them, you can still remove them from Salesforce by deleting them manually.

Define Lightning Sync for Google Settings for Reps

After reps prepare their Google Calendar[™] events to sync with Salesforce, admins can define sync settings for groups of reps in Lightning Sync configurations. This step kicks off the sync process for reps, and determines how their contacts and events sync between the two systems.

Before admins roll out Lightning Sync to reps, admins can familiarize themselves with our Lightning Sync Considerations. There's potential for Lightning Sync to overwrite data or sync data between Salesforce orgs unless admins are considerate about how they roll out the product.

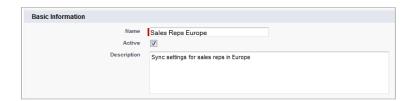
Defining sync settings lets admins define how their reps sync. Admins can decide:

- Which reps sync
- Whether contacts, events, or both items sync
- Which direction items sync
- To create filters to limit certain contacts or events from syncing
- Whether reps' private events sync
- Whether reps sync all events or only events that reps relate to Salesforce records using Lightning for Gmail
- Whether events reps delete in their Google Calendars are automatically removed from Salesforce too
- Whether important events are automatically related to the appropriate Salesforce contacts or lead

We recommend that reps prepare their Google Calendar events to sync with Salesforce before admins define sync settings. It's easier for reps to manage events before sync starts than to remove syncing items from Salesforce later. Reps don't have to prepare their contacts. Reps manage which Google contacts sync after you save their Lightning Sync configurations and kick off the sync process.

Follow these steps to define your reps' Lightning Sync for Google settings.

- 1. From Setup, enter Sync in the Quick Find box, then select Lightning for Gmail and Sync.
- 2. Click Let users sync contacts, events, or both between Google and Salesforce to see additional setup steps.
- **3.** From the Set Sync Settings and Check Status section, click **New Config**.
- 4. Click New Lightning Sync Configuration.
- **5.** Enter the name of the configuration. For example, if you're creating a configuration for reps in a particular region, enter a unique name, and then select Active.



6. Assign reps and profiles to this configuration.

EDITIONS

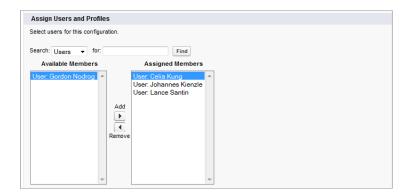
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USER PERMISSIONS

To access Lightning Sync setup:



- 7. Indicate the sync direction for your reps' contacts or person accounts, and select your preferred matching behavior.
- **8.** Indicate the sync direction for reps' events.
- **9.** Indicate whether you want all Google events to sync to Salesforce, or only the events that reps select. If you set up reps to select events, events reps relate to Salesforce from Lightning for Gmail start syncing from Google Calendar to Salesforce. To finish setting up that option, you're required to enable Lightning for Gmail, and your users are required to complete Lightning for Gmail setup.

10. Click Save.

- **11.** Set filters to specify the contacts reps can sync from Salesforce to Google. You are required to set filters based on your reps' record ownership. Choose whether you want to:
 - Limit contacts that users sync to only what reps own, choose **Selected Contacts**, and then select **User's Records**. Make sure that you select both of these settings together, or no contacts sync for users in this configuration.
 - Let reps sync all contacts they can see in Salesforce, choose All Contacts.



Set more sync filters, if you wish. For example, to prevent contacts from outside your reps' territories from syncing, create sync filters



for specific fields on reps' contact records.

- 12. Select Sync private events to sync events your reps have marked as private in their Google Calendar.
- 13. Select Delete synced events to let reps delete Google events and Salesforce events
- **14.** Select Automatically relate Google events to Salesforce records to relate important events to the appropriate Salesforce contacts or lead automatically.

15. Specify the specific events reps can sync from Google to Salesforce. Enter a filter in the Greater or equal to field. Doing so limits the events reps can sync to these time frames.

- TODAY—Syncs events that end on or after today. The start time is 12:00 a.m. Learn more on page 63 about why this selection is recommended in certain scenarios.
- LAST MONTH—Syncs events that ended on or after the first day of last month.
- LAST N DAYS—Syncs events that ended on or after a specified number of days ago, such as LAST 30 DAYS. You can sync events that ended up to 180 days ago.

16. Click Save.

Syncing has begun for reps in this Lightning Sync configuration.

Get Ready to Sync Contacts with Lightning Sync for Google

Learn how to sync contacts between Google Contacts and Salesforce when you're set up to use Lightning Sync for Google.

After your Salesforce admin initiates contacts sync for you, Lightning Sync creates a group in Google Contacts called Salesforce Sync. Any contacts that have synced from Salesforce to Google are found in the Salesforce Sync group. Gmail[™] accesses those contacts automatically when you attempt to email or chat with those contacts. Or if you;re set up to sync from Google Contacts to Salesforce, you can add Google Contacts to the Salesforce Sync group, and Lightning Sync starts syncing the contact with Salesforce during the next sync cycle.

Don't rename, move, or delete the Salesforce Sync group, or syncing between Salesforce and Google Contacts could stop.

EDITIONS

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USER PERMISSIONS

To sync contacts both ways:

 Read and Edit on contacts, and Read on accounts, AND contact sync direction set to Sync both ways in Lightning Sync configurations

To sync contacts from Salesforce to Google:

 Read on contacts, AND contact sync direction set to Salesforce to Google in Lightning Sync configurations

To sync contacts from Google to Salesforce:

 Create on contacts, AND contact sync direction set to Google to Salesforce in Lightning Sync configurations

Manage Lightning Sync Users

After you've set up Lightning Sync, manage how your sales reps experience the feature and assist users in troubleshooting problems.

Assign Reps to Lightning Sync Configurations

After setting up Lightning Sync, Salesforce admins can assign reps to a Lightning Sync configuration to get contacts or events to sync between reps' calendar applications and Salesforce. Admins can assign individual reps or user profiles to add multiple users to configurations.

Fix Sync Issues for Lightning Sync Users

If an Lightning Sync user has trouble syncing between your email server and Salesforce, you can troubleshoot sync issues by checking your users' sync statuses or running a Lightning Sync error report. If you find a sync issue that a user can't overcome, then you can reset that user's sync process for them.

EDITIONS

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Assign Reps to Lightning Sync Configurations

After setting up Lightning Sync, Salesforce admins can assign reps to a Lightning Sync configuration to get contacts or events to sync between reps' calendar applications and Salesforce. Admins can assign individual reps or user profiles to add multiple users to configurations.

Before admins assing reps to Lightning Sync configurations, consider how that rep's records sync if they're already mentioned in another configuration:

- If you assign an individual user to two Lightning Sync configurations, the user is removed from the first configuration automatically and assigned to the new one.
- If you assign a user to two Lightning Sync configurations as both an individual user and as part
 of a profile, the user is not removed from either configuration, but the user's records will sync
 according to the configuration that lists the user individually.
- If you assign a user to one Lightning Sync configuration and one configuration, the user is not removed from either configuration, but the user's records will sync according to the Lightning Sync configuration.

Users observe the assignments you've created, added, or removed the next time Lightning Sync runs a sync cycle.

To assign a user to a Lightning Sync configuration,

- **1.** From Setup, enter *Lightning Sync Configurations* in the Quick Find box, then select **Lightning Sync Configurations**.
- 2. If you're modifying a Lightning Sync configuration, click **Edit** next to the one that you want to modify. Otherwise, click **New Lightning Sync Configuration**, and then complete the required fields.
- **3.** In the Assign Users and Profiles section, select either *Profiles* or *Users* in the Search drop-down list.
- 4. If you don't see the member you want to add, enter keywords in the search box and click Find.
- **5.** Select members from the Available Members box, and click **Add** to add them to the group. If all available users are assigned to this configuration, the Users list is empty and you can only assign profiles.
- **6.** To remove members, select those members and click **Remove**.
- 7. Click Save.

SEE ALSO:

How Lightning Sync Manages Sync Conflicts with Salesforce for Outlook Considerations for Companies With Multiple Salesforce Organizations

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USER PERMISSIONS

To view Lightning Sync configurations

 View Setup and Configuration

To create, edit, or delete Lightning Sync configurations:

Fix Sync Issues for Lightning Sync Users

If an Lightning Sync user has trouble syncing between your email server and Salesforce, you can troubleshoot sync issues by checking your users' sync statuses or running a Lightning Sync error report. If you find a sync issue that a user can't overcome, then you can reset that user's sync process for them.

Check Lightning Sync Users' Sync Statuses

If Lightning Sync users can't sync, Salesforce admins can check their individual sync statuses—and the sync status of Lightning Sync setup—to troubleshoot the problem.

Build and Run a Lightning Sync Error Report

If Lightning Sync users can't sync, Salesforce admins can build and run an error report to discover what's causing sync to fail and for which users. The report details provide suggestions to help you troubleshoot sync issues.

Reset Sync for Lightning Sync Users

If a rep has trouble syncing between your email server and Salesforce, Salesforce admins can reset that rep's sync process. Resetting sync clears out and then restores the connections between a rep's email and calendar applications and Salesforce records. Resetting the sync process doesn't affect information stored in those records.

EDITIONS

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Test the Connection Between Your Server and Salesforce

Salesforce Admins setting up Lightning Sync for Microsoft[®] Exchange should run both the Lightning Sync connection test and the Microsoft Remote Connectivity Analyzer to test their connectivity between their servers and Salesforce. The tests differ slightly, so running both gives admins more information about the connection status. Admins setting up Lightning Sync for Google need only run the Lightning Sync connection test.

Lightning Sync for Microsoft® Exchange Statuses

Understanding Lightning Sync for Microsoft Exchange statuses helps you assess and address Lightning Sync errors that appear on the Lightning Sync status page in Salesforce.

Check Lightning Sync Users' Sync Statuses

If Lightning Sync users can't sync, Salesforce admins can check their individual sync statuses—and the sync status of Lightning Sync setup—to troubleshoot the problem.

- 1. From Setup, enter *Sync* in the Quick Find box, then select **Lightning for Gmail and Sync** or **Lightning for Outlook and Sync**, depending on which product you use.
- **2.** Click **Let users sync contacts, events, or both between Google and Salesforce** to see additional setup steps.
- **3.** From the Set Sync Settings and Check Status section, click **Check**.
- **4.** Type the name of the user whose sync status you'd like to check, and click **Check Status**. The sync status for that user is displayed.

In some cases, admins may need to reset sync for a user.

If you need help interpreting sync statuses, or need recommendations on correcting sync issues, check out Lightning Sync for Microsoft® Exchange Statuses.

SEE ALSO:

Build and Run a Lightning Sync Error Report Reset Sync for Lightning Sync Users

EDITIONS

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USER PERMISSIONS

To access Lightning Sync statuses:

Build and Run a Lightning Sync Error Report

If Lightning Sync users can't sync, Salesforce admins can build and run an error report to discover what's causing sync to fail and for which users. The report details provide suggestions to help you troubleshoot sync issues.

First, you create a custom report type using a Lightning Sync Error Report custom object we've set up for you in Salesforce. Then create a Lightning Sync error report. Finally, run your report to help your users fix those pesky sync errors they're experiencing.

- 1. Create a custom report type. Set the Primary Object to Lightning Sync Error.
- 2. Create your Lightning Sync error report. From the Reports tab, click **New Report**. Set the Report Type to the Lightning Sync report type you created in step 1, and click **Create**.
- 3. Save and run your Lightning Sync error report. From the unsaved report, click Save, complete the required fields, and click Save and Run Report.
 Salesforce generates a list of errors sync errors found in your organization, or displays "Grand Totals (0 records)" if the report couldn't identify any sync errors.

If the report couldn't identify any errors, but users still can't sync, contact Salesforce.

SEE ALSO:

Lightning Sync for Microsoft® Exchange Statuses

EDITIONS

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USER PERMISSIONS

To create or update the Lightning Sync Error Report:

View All Data

To create or update custom report types:

 Manage Custom Report Types

To create, edit, and delete reports:

Create and Customize Reports AND Report Builder

Reset Sync for Lightning Sync Users

If a rep has trouble syncing between your email server and Salesforce, Salesforce admins can reset that rep's sync process. Resetting sync clears out and then restores the connections between a rep's email and calendar applications and Salesforce records. Resetting the sync process doesn't affect information stored in those records.

- 1. If set up to sync contacts using Lightning Sync for Microsoft Exchange, make sure that the reps' Salesforce_Sync folder contains only contacts the rep wants to sync with Salesforce. Lightning Sync for Google users can ignore this step.
- 2. If set up to sync events, make sure that events that the rep doesn't want to sync are managed from the rep's calendar application.
- **3.** From Salesforce Setup, enter *Lightning Sync Status* in the Quick Find box, then select **Lightning Sync Status**.
- **4.** Type a rep's name, and click **Reset Sync**. During the next sync cycle, Lightning Sync:
 - Syncs all contacts between the rep's Salesforce_Sync folder (Microsoft Exchange)
 or Salesforce Sync group (Google Contacts) and Salesforce. Lightning Sync excludes
 contacts that fall outside of the filters you set in the rep's sync configuration.
 - Syncs all events from the rep's calendar application to Salesforce. Lightning Sync excludes
 events that fall outside of the filters you set in the rep's sync configuration, or events that
 the rep prevented from syncing.

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USER PERMISSIONS

To access rest sync:

Test the Connection Between Your Server and Salesforce

Salesforce Admins setting up Lightning Sync for Microsoft[®] Exchange should run both the Lightning Sync connection test and the Microsoft Remote Connectivity Analyzer to test their connectivity between their servers and Salesforce. The tests differ slightly, so running both gives admins more information about the connection status. Admins setting up Lightning Sync for Google need only run the Lightning Sync connection test.

Test your connection status to confirm whether you and your IT pros have set up Lightning Sync successfully. Or, run the connection tests if Lightning Sync was syncing successfully, but syncing suddenly stops for all reps in your Salesforce organization.



Note: The Microsoft Remote Connectivity Test and the Lightning Sync Connection Test check general connectivity between your email server and your Salesforce organization. If you want to test connectivity for only one (or a few) of your reps, check their sync statuses from Lightning Sync Status in Setup.

- Run the Microsoft® Remote Connectivity Analyzer with Lightning Sync Parameters
- Run the Lightning Sync Connection Test for Microsoft® Exchange Users
- Run the Lightning Sync Connection Test for Google Users

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USER PERMISSIONS

To get the necessary parameters to run the Microsoft Remote Connectivity Analyzer:

 Administrative access to your company's Microsoft[®] Exchange server

To run the Lightning Sync connection test:

Lightning Sync for Microsoft® Exchange Statuses

Understanding Lightning Sync for Microsoft Exchange statuses helps you assess and address Lightning Sync errors that appear on the Lightning Sync status page in Salesforce.

System Statuses

Table 1: Configuration Setup Statuses

| If | Provides this status | This status means that |
|--|-----------------------------------|--|
| Microsoft Exchange service account provided: | Your Service Account User Name | You've saved your service account credentials in Salesforce, and Lightning Sync has recognized a valid service account. This status doesn't necessarily mean that the service account is set up to sync using Lightning Sync. If you continue to have sync errors, we recommend that you use Microsoft®'s Remote Connectivity Analyzer tool to test your connection and troubleshoot setup issues. |
| | None | Lightning Sync couldn't save your service account credentials. Verify that you've provided the correct service account ID and password and that you've set up a valid service account in Microsoft Exchange. |
| Lightning for Outlook enabled: | Yes | You've enabled Lightning for Outlook in Setup. If you've set up sales reps to select which Microsoft events sync to Salesforce, reps select events using Lightning for Outlook. |
| | No | You haven't enabled Lightning for Outlook in Setup. If you've set up sales reps to select which Microsoft events sync to Salesforce, reps can't select events until you've enabled Lightning for Outlook. |
| Salesforce recognizes Microsoft Exchange service account: | ✓ | Lightning Sync recognizes the service account that you |

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| If | Provides this status | This status means that |
|--|--|--|
| | | provided. This status doesn't necessarily mean that the service account is set up to sync using Lightning Sync. If you continue to see sync errors, we recommend that you use Microsoft [®] 's Remote Connectivity Analyzer tool to test your connection and troubleshoot setup issues. |
| | × | Lightning Sync couldn't recognize the service account that you provided. Check to make sure that you've set up a valid service account in Microsoft Exchange. |
| Users with linked Microsoft Exchange and Salesforce email addresses: | The expected number of Lightning Sync users | All of your users' Microsoft Exchange email addresses have mapped correctly to the corresponding Salesforce email addresses. |
| | An unexpected number of Lightning Sync users | Some of your users' Microsoft Exchange email addresses have not mapped correctly to the corresponding Salesforce email addresses. Compare your users' addresses in Exchange and Salesforce to verify that they match. |
| | 0 | None of your users' Microsoft Exchange email addresses has mapped to its corresponding Salesforce email addresses. Contact Salesforce Customer Support. |

Table 2: Contacts Statuses

| If | Provides this status | This status means that |
|---------------------|---|---|
| Last sync activity: | A contact sync time within the last few minutes | Your organization last synced contacts with Lightning Sync on this date, at this time. In general, Lightning Sync is syncing records as expected. If you see this status and individual users still report that contacts are not syncing as expected, check your Exchange server or Lightning Sync configurations for settings related to those particular users. |
| | A contact sync time within a few hours | Your organization last synced contacts on this date, at this time. It's possible you recently set up Lightning Sync, because the initial contacts sync might take up to several hours to complete. If you haven't initiated contacts sync for your organization for the |

| If | Provides this status | This status means that |
|------------------------------------|---|--|
| | | first time, this status might indicate a problem with contacts sync in your organization. Monitor the last sync activity over the next 24 hours to see if syncing resumes. |
| | A contact sync time on a past date | Your organization last synced contacts on this date, at this time. If your organization doesn't sync again within 24 hours, verify that you provided the correct Exchange service account credentials, that Salesforce recognized your service account, and that you've used Microsoft's Remote Connectivity Analyzer to verify that your Exchange server can communicate with Lightning Sync. If the analyzer shows that your connection is working, contact Salesforce Customer Support. |
| Records synced in last 60 minutes: | The number of contacts that were synced in your organization in the last 60 minutes | Within the last 60 minutes, your organization last synced this number of contacts. |
| | 0 | Your organization hasn't synced any contacts within the last 60 minutes. Monitor record sync activity over the next 24 hours to see if sync resumes. If sync doesn't resume, use Microsoft's Remote Connectivity Analyzer to verify that your Exchange server can communicate with Lightning Sync. If the analyzer shows that your connection is working, contact Salesforce Customer Support. |
| Records synced in last 24 hours: | The number of contacts that were synced in your organization over the last 24 hours | Within the last 24 hours, your organization synced this number of contacts. |
| | 0 | Your organization hasn't synced any contacts within the last 60 minutes. Use Microsoft's Remote Connectivity Analyzer to verify that your Exchange server can communicate with Lightning Sync. If the analyzer shows that your connection is working, contact Salesforce Customer Support. |

Table 3: Events Statuses

| If | Provides this status | This status means that |
|------------------------------------|---|--|
| Last sync activity: | An event sync time within the last few minutes | Your organization last synced events with Lightning Sync on this date, at this time. In general, Lightning Sync is syncing records as expected. If you see this status and individual users still report that events are not syncing as expected, check your Exchange server or Lightning Sync configurations for settings related to those particular users. |
| | An event sync time within a few hours | Your organization last synced events on this date, at this time. You might have recently set up Lightning Sync, because the initial events sync might take up to several hours to complete. If you haven't initiated events sync for your organization for the first time, this status might indicate a problem with events sync in your organization. Monitor the last sync activity over the next 24 hours to see if syncing resumes. |
| | An event sync time on a past date | Your organization last synced events on this date, at this time. If your organization doesn't sync again within 24 hours or longer, verify that you provided the correct Exchange service account credentials, that Salesforce recognized your service account, and that you've used Microsoft's Remote Connectivity Analyzer to verify that your Exchange server can communicate with Lightning Sync. If the analyzer shows that your connection is working, contact Salesforce Customer Support. |
| Records synced in last 60 minutes: | The number of events that were synced in your organization in the last 60 minutes | Within the last 60 minutes, your organization last synced this number of events. |
| | 0 | Your organization hasn't synced any events within the last 60 minutes. Monitor record sync activity over the next 24 hours to see if syncing resumes. If syncing doesn't resume, use Microsoft's Remote Connectivity Analyzer to verify that your Exchange server can communicate with Lightning Sync. If the analyzer shows that your connection is working, contact Salesforce Customer Support. |

| If | Provides this status | This status means that |
|----------------------------------|---|--|
| Records synced in last 24 hours: | The number of contacts that were synced in your organization in the last 24 hours | Within the last 24 hours, your organization synced this number of contacts. |
| | 0 | Your organization hasn't synced any events within the last 60 minutes. Use Microsoft's Remote Connectivity Analyzer to verify that your Exchange server can communicate with Lightning Sync. If the analyzer shows that your connection is working, contact Salesforce Customer Support. |

User Statuses

Table 4: Configuration Setup Statuses

| If | Provides this status | This status means that |
|---|----------------------|---|
| User assigned to active Exchange configuration: | ✓ | This user is set up to sync in an active Lightning Sync configuration. |
| | × | This user isn't set up to sync in an active Lightning Sync configuration. |
| User mailbox is running on supported version of Microsoft Exchange: | ✓ | Lightning Sync supports this user's version of Microsoft Exchange. |
| | × | Lightning Sync doesn't support this user's version of Microsoft Exchange. |
| User recognized by Exchange service account: | ✓ | This user is represented by the service account that you've set up in Exchange, and Lightning Sync can communicate with your Exchange service account. |
| | × | This user isn't represented by the service account that you've set up in Exchange, or Lightning Sync can't communicate with the Exchange service account that you provided. Check your Exchange service account setup to verify that you've set up a valid service account and that it accurately represents this user. |
| User's reset sync status: | Marked for reset | You've reset this user for sync, but the reset hasn't started. Your reset request is in the system queue and will be completed when the system is available. |
| | Reset in progress | The reset sync process is in progress. When reset is complete, "User's reset sync status" is no longer displayed on this page. |

| If | Provides this status | This status means that |
|------------------------------------|----------------------|---|
| User set up Lightning for Outlook: | Yes | This sales reps has set up Lightning for Outlook. If you've set up reps to select which Microsoft events sync to Salesforce, reps select events using Lightning for Outlook. |
| | No | This sales rep hasn't set up Lightning for Outlook. If you've set up reps to select which Microsoft events sync to Salesforce, reps can't select events until they've set up Lightning for Outlook. |

Table 5: Contacts Statuses

| If | Provides this status | This status means that |
|---|--------------------------|---|
| Salesforce_Sync folder found: | ✓ | The Salesforce_Sync folder was found in this user's email account under the Contacts directory. |
| | × | Lightning Sync can't find the Salesforce_Sync folder on your Exchange server or can't create it automatically for this user. You can create the folder Salesforce_Sync for this user as a subdirectory under the Contacts directory in this user's email account. |
| Salesforce and Exchange email addresses linked: | ✓ | This user's Microsoft Exchange email address has mapped to the user's Salesforce email address correctly. |
| | × | This user's Microsoft Exchange email address hasn't mapped to the user's Salesforce email address correctly. Reset sync for this user. |
| Salesforce to Exchange sync status: | Not started | This user's contacts hasn't started syncing from Salesforce to Exchange. |
| | Initial sync in progress | This user's contacts are syncing from Salesforce to Exchange for the first time. This initial sync might take several hours. |
| | Initial sync completed | This user's contacts have completed syncing from Salesforce to Exchange for the first time. |
| | Sync in progress | This user's contacts are syncing from Salesforce to Exchange right now. |
| | In sync | This user's contacts have completed syncing from Salesforce to Exchange. |

Sales Productivity

Lightning Sync

| If | Provides this status | This status means that |
|-------------------------------------|---|---|
| | Exchange configuration not set to sync | This user isn't set up to sync contacts from Salesforce to Exchange in an active Lightning Sync configuration. |
| Exchange to Salesforce sync status: | Not started | This user's contacts have not started syncing from Exchange to Salesforce yet. |
| | Initial sync in progress | This user's contacts are syncing from Exchange to Salesforce for the first time. This initial sync might take several hours. |
| | Initial sync completed | This user's contacts have completed syncing from Exchange to Salesforce for the first time. |
| | Sync in progress | This user's contacts are syncing from Exchange to Salesforce. |
| | In sync | This user's contacts have completed syncing from Exchange Salesforce. |
| | Exchange configuration not set to sync | This user isn't set up to sync contacts from Exchange to Salesforce in an active Lightning Sync configuration. |
| Records in sync | The number of contacts that are syncing for this user | This user has this number of contacts syncing between Exchange and Salesforce. If this user's contacts are syncing as expected, this number matches the number of contacts in this user's Salesforce_Sync folder. |

Table 6: Event Statuses

| If | Provides this status | This status means that |
|---|----------------------|--|
| Calendar folder found: | ✓ | The calendar folder was found in this user's email account. |
| | × | Lightning Sync can't find the user's calendar folder on your Exchange server. |
| Salesforce and Exchange email addresses linked: | ✓ | This user's Microsoft Exchange email address has mapped to the user's Salesforce email address correctly. |
| | × | This user's Microsoft Exchange email address hasn't mapped to the user's Salesforce email address correctly. Reset sync for this user. |
| Salesforce to Exchange sync status: | Not started | This user's events haven't started syncing from Salesforce to Exchange. |

Sales Productivity

Lightning Sync

| If | Provides this status | This status means that |
|-------------------------------------|---|---|
| | Initial sync in progress | This user's events are syncing from Salesforce to Exchange for the first time. This initial sync might take several hours. |
| | Initial sync completed | This user's events have completed syncing from Salesforce to Exchange for the first time. |
| | Sync in progress | This user's events are syncing from Salesforce to Exchange right now. |
| | In sync | This user's events have completed syncing from Salesforce to Exchange. |
| | Exchange configuration not set to sync | This user isn't set up to sync events from Salesforce to Exchange in an active Lightning Sync configuration. |
| Exchange to Salesforce sync status: | Not started | This user's events haven't started syncing from Exchange to Salesforce. |
| | Initial sync in progress | This user's events are syncing from Exchange to Salesforce for the first time. This initial sync might take several hours. |
| | Initial sync completed | This user's events have completed syncing from Exchange to Salesforce for the first time. |
| | Sync in progress | This user's events are syncing from Exchange to Salesforce. |
| | In sync | This user's events have completed syncing from Exchange Salesforce. |
| | Exchange configuration not set to sync | This user isn't set up to sync events from Exchange to Salesforce in an active Lightning Sync configuration. |
| Records in sync | The number of events that are syncing for this user | This user has this number of events syncing from Exchange to Salesforce. If this user reports difficulty syncing only some events, verify that the user is set up to sync events as expected in the user's Lightning Sync configuration and that the user didn't assign the private option to the event. Also remember that at this time, Lightning Sync doesn't sync recurring events or invitees on events. |

Sales Productivity Lightning for Gmail

Lightning for Gmail

Get visibility into Salesforce content right where you work, so you can efficiently manage your sales pipeline and close deals faster—directly from Gmail™. Lightning for Gmail—the email integration for Gmail users—gives you a quick view of your sales-related records without making you switch between Salesforce and Gmail.

After your administrator enables Lightning for Gmail, you complete one-time procedures to get your Salesforce content to appear in your email application.

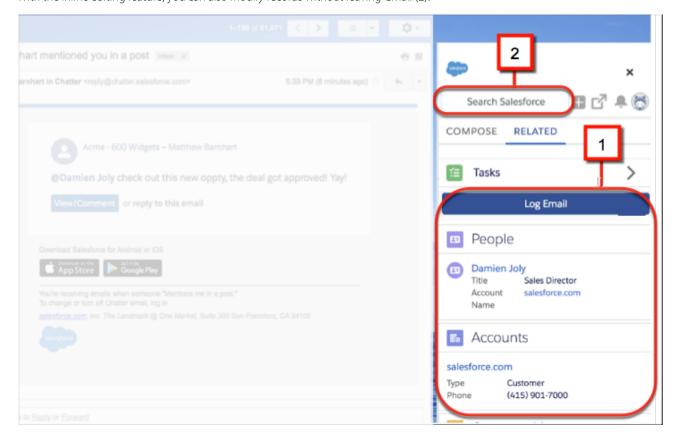
Then you can:

- View and relate Salesforce contacts, leads, accounts, opportunities, and cases relevant to the Gmail messages you received or sent (1).
- Create new Salesforce records, including custom objects from the Action Publisher.
- Search for custom object records and create a Salesforce record using actions available to you. With the inline editing feature, you can also modify records without leaving Gmail (2).

EDITIONS

Available in Salesforce Classic and Lightning Experience

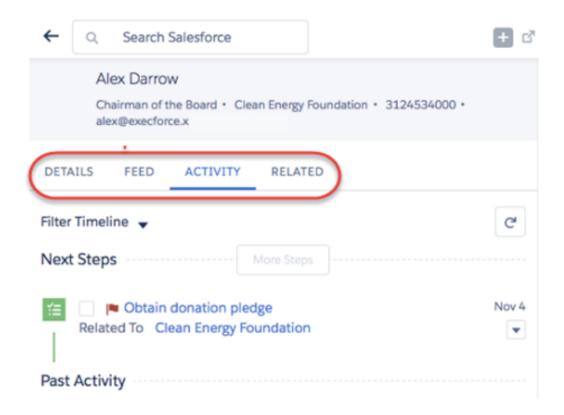
Available with Sales Cloud, Service Cloud, and Lightning Platform in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



• Drill down for more details on a Salesforce record right from Lightning for Gmail. In addition to a record's detail page, you get to see its Chatter feed, activity timeline, and related lists.

Sales Productivity

Lightning for Gmail



• View and relate Google calendar events to Salesforce records.

Get Started with Lightning for Gmail

Set Up Sales Reps to Experience Salesforce from Gmail™

Help your sales teams see, create, and modify Salesforce records directly in Gmail.

Customize Lightning for Gmail for Your Sales Reps

Help your Lightning for Gmail users get more done by customizing the Salesforce content they see and work with from Gmail™.

Sales Productivity

Lightning for Gmail

Set Up Sales Reps to Experience Salesforce from Gmail™

Help your sales teams see, create, and modify Salesforce records directly in Gmail.

(1) Important: Before you let your sales teams experience Lightning for Gmail, verify that Enhanced Email is enabled for your organization.

After getting access to Enhanced Email for Lightning for Gmail, complete these steps to enable Lightning for Gmail for your sales teams.

- 1. From Salesforce Setup, enter *Lightning for Gmail* in the Quick Find box, then select **Lightning for Gmail and Sync**.
- 2. Enable and expand Let users access Salesforce records from Gmail.
- **3.** To let reps relate emails to relevant Salesforce records, enable Enhanced Email with Lightning for Gmail.
- **4.** To give sales reps access to global actions in Lightning for Gmail, create new or assign existing publisher layouts from the **Lightning for Gmail Publisher Layouts** section. Save your changes.

Next, to begin working with Lightning for Gmail, your sales team members complete their short setup procedure in Gmail.

Lightning for Gmail System Requirements

Make sure that your system meets these requirements before you set up Lightning for Gmail.

Set Up Lightning for Gmail from Your Gmail[™] Account

Sales reps can now see, create, and modify Salesforce records directly in Gmail.

Lightning for Gmail with Enhanced Email

Turn on Enhanced Email with Lightning for Gmail for your reps, so they can relate emails to relevant Salesforce records quickly and easily.

Lightning for Gmail System Requirements

Make sure that your system meets these requirements before you set up Lightning for Gmail.

| For your | You need |
|----------|---|
| Email | G Suite Gmail with a unique email domain in this format: @yourcompanyname.com. |
| Browser | Google Chrome $^{\text{\tiny{M}}}$, most recent stable version . Ensure that Block third-party cookies is disabled in the Content settings. |

EDITIONS

Available to manage from Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable Lightning for Gmail

Customize Application

EDITIONS

Available in Salesforce Classic and Lightning Experience

Available with Sales Cloud, Service Cloud, and Lightning Platform in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions Sales Productivity

Lightning for Gmail

Set Up Lightning for Gmail from Your Gmail[™] Account

Sales reps can now see, create, and modify Salesforce records directly in Gmail.

Before you can begin experiencing Lightning for Gmail, you have to complete these steps to add Lightning for Gmail to the Chrome browser.

- 1. In the Chrome Web Store, enter *Lightning for Gmail* in the Search box, then select the **Lightning for Gmail** extension.
- 2. Click **Add to Chrome** and confirm **Add extension** to add it to your Gmail account.
- **3.** After adding Lightning for Gmail to Chrome and navigating to Gmail, enter your Salesforce credentials in the new pane displayed to the right of the Inbox.



Tip: For better viewing experience, we recommend that you turn off Gmail's People widget. For more support, visit Google's support website and search for keywords mentioned here.

EDITIONS

Available in Salesforce Classic and Lightning Experience

Available with Sales Cloud, Service Cloud, and Lightning Platform in: **Group**, **Professional, Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Lightning for Gmail

Customize Application

Lightning for Gmail with Enhanced Email

Turn on Enhanced Email with Lightning for Gmail for your reps, so they can relate emails to relevant Salesforce records quickly and easily.



Note: Enhanced Email is required to relate any email to Salesforce from Lightning for Gmail.

With Enhanced Email:

- Reps can relate emails to Salesforce records while composing the emails.
- Reps can select which contacts, leads, and users to relate the email to.
- When reps relate an email to a relevant account, opportunity, case, or custom object, all contacts, leads, and users on the email are automatically related.
- Related emails maintain their rich HTML formatting, so emails have the same look and feel in Salesforce as they did in Gmail[™].
- Related emails are saved as Email Message records.

EDITIONS

Available to manage from Salesforce Classic and Lightning Experience

Available with Sales Cloud, Service Cloud, and Lightning Platform in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Considerations for Enhanced Email with Lightning for Gmail

Before turning on Enhanced Email for Lightning for Gmail, there are some considerations to think about.

- Sales reps can relate an email to people, including contacts, leads, and Salesforce users who are included on the email recipient list.
- In addition to the email recipients, sales reps can relate an email to one more Salesforce record, such as account, opportunity, case, or custom object.
- For emails related to a case, sales reps can change the relationship to another case after deleting the original Email Message record.

 The change removes the original relationships.
- For emails related to a lead, sales reps can change the relationship to another lead if that lead is the email's recipient or sender.

Sales Productivity Lightning for Gmail

• For emails related to an account, opportunity or a custom object record, sales reps can change the relationship to any other Salesforce records, except cases.

SEE ALSO:

Set Up Enhanced Email

Customize Lightning for Gmail for Your Sales Reps

Help your Lightning for Gmail users get more done by customizing the Salesforce content they see and work with from Gmail $^{\mathbb{T}}$.

To customize Lightning for Gmail for your users, first enable custom content for Lightning for Gmail.

- 1. From Setup, enter *Lightning for Gmail* in the Quick Find box, and select **Lightning for Gmail and Sync**.
- 2. Expand Let users access Salesforce records from Gmail.
- 3. Enable Customize content with App Builder.
- **4.** In Salesforce Classic, click **Save**. Now you're ready to create custom email application panes with the Lightning App Builder.
- 1. Create Custom Email Application Panes for Lightning for Gmail Users
 Choose the Salesforce content that sales reps see from Lightning for Gmail by creating custom
 email application panes with the Lightning App Builder.
- 2. Assign Custom Email Application Panes to Lightning for Gmail Users

 To get your reps up and running using custom email application panes for Lightning for Gmail users, activate the panes and assign them to user profiles.

EDITIONS

Available in Salesforce Classic and Lightning Experience

Available with Sales Cloud, Service Cloud, and Lightning Platform in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize Lightning for Gmail and create and save Lightning pages in the Lightning App Builder

Customize Application

To view Lightning pages in the Lightning App Builder

 View Setup and Configuration Sales Productivity Lightning for Gmail

Create Custom Email Application Panes for Lightning for Gmail Users

Choose the Salesforce content that sales reps see from Lightning for Gmail by creating custom email application panes with the Lightning App Builder.

Create an email application pane and add the standard or custom components you want your Lightning for Gmail users to see and work with from $\mathsf{Gmail}^{\mathsf{m}}$. You can also use components you find on $\mathsf{AppExchange}$.

- 1. Create an email application pane. The steps are different depending on whether you're working from Lightning Experience or Salesforce Classic.
 - In Lightning Experience:

From Setup, enter *Lightning for Gmail* in the Quick Find box, and select **Lightning for Gmail and Sync**. Expand **Let users access Salesforce records from Gmail**. Click **New** under Email Application Panes.

In Salesforce Classic:

From Setup, enter App Builder in the Quick Find box, and select **New** under Lightning Pages. Select **Email Application Pane**. Continue through the wizard. To start with an empty layout, select the Pane template. To start with a layout that contains standard components, clone the system default page. Click **Finish**

2. Drag components onto the pane.

You can drag components up or down to rearrange their order.

- **3.** To view the page properties, add a description, or set a filter for when a component appears, click the empty area of the canvas.
 - Tip: Some components make sense when a rep is reading emails or viewing events. Some components make more sense when a rep is writing emails or editing events. Use a filter to set if a component appears when the rep is in reading or writing mode. Components without a filter always appear in the email application pane.

4. Click Save.

To make the email application pane available to Lightning for Gmail users, activate the pane and assign it to user profiles.

EDITIONS

Available in Salesforce Classic and Lightning Experience

Available with Sales Cloud, Service Cloud, and Lightning Platform in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize Lightning for Gmail and create and save Lightning pages in the Lightning App Builder

Customize Application

To view Lightning pages in the Lightning App Builder

 View Setup and Configuration

Assign Custom Email Application Panes to Lightning for Gmail Users

To get your reps up and running using custom email application panes for Lightning for Gmail users, activate the panes and assign them to user profiles.

You can set a pane as default for all users, or assign it to specific user profiles.

Follow these steps to edit pane assignments.

- 1. Access your email application panes. You complete this step differently depending on whether you're working from Lightning Experience or Salesforce Classic.
 - In Lightning Experience, from Setup, enter Lightning for Gmail in the Quick Find box, and select Lightning for Gmail Settings.
 - In Salesforce Classic, from Setup, enter App Builder in the Quick Find box, and select Lightning App Builder Settings.
- 2. Click **Edit** for the user profile you want to activate.
- 3. Click Activation.



Note: From Lightning Experience, you can assign an email application pane to multiple user profiles by clicking **Set Page Assignments**.

EDITIONS

Available in Salesforce Classic and Lightning Experience

Available with Sales Cloud. Service Cloud, and Liahtnina Platform in: Group, Professional, Enterprise, Performance, Unlimited. and **Developer** Editions

USER PERMISSIONS

To customize Lightning for Gmail, create and save Lightning Pages in the Lightning App Builder

Customize Application

To view Lightning Pages in the Lightning App Builder

View Setup and Configuration

Gain Speed and Consistency with Email Templates

Whether it's writing to prospects or customers, sales reps craft emails quicker with email templates. In Salesforce, reps can create email templates that address different business needs. When they're ready to send an email, reps pull up the template in their email application pane, and tweak the content as needed. Using templates with Lightning for Outlook or Lightning for Gmail also ensures consistent messaging from your team to your customers.



Tip: Reps can also save an email they are composing as a template directly from Lightning for Outlook and Lightning for Email. However, if you want to include an attachment as part of the template, create the template in Salesforce.

Use Lightning Email Templates with Your Email Application

Use Lightning email templates with Lightning for Outlook or Lightning for Gmail to save time and maintain consistent messaging to all your customers. When you're ready to send an email,

you can access the templates from your email application. You can also create your own Lightning email template from email messages you craft.

Use Salesforce Classic Email Templates in Microsoft® Outlook® and Gmail

Save your reps time and maintain consistent messaging for customers. Email templates in Salesforce Classic are available to reps using Lightning for Outlook or Lightning for Gmail. Reps can further boost productivity by accessing shared Classic templates from their email application. To let your reps include Salesforce records in the email messages, add merge fields to the templates.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available with Sales Cloud, Service Cloud, and Lightning Platform in: Group, Professional, Enterprise, Performance, Unlimited. and **Developer** Editions

Use Lightning Email Templates with Your Email Application

Use Lightning email templates with Lightning for Outlook or Lightning for Gmail to save time and maintain consistent messaging to all your customers. When you're ready to send an email, you can access the templates from your email application. You can also create your own Lightning email template from email messages you craft.

- 1. Create a template in Lightning Experience.
 - ? Tip: Reps can also save an email they are composing as a template directly from Lightning for Outlook and Lightning for Email. However, if you want to include an attachment as part of the template, create the template in Salesforce.
- **2.** In your email application, start composing an email and specify its recipients.
- 3. In your email application pane, click Email Template.
- **4.** To view a list of available Lightning email templates for a record type, such as leads, select the record type.
- 5. Select the Lightning template you want to use for the email you're composing.
- **6.** After the template appears in the email body, modify the email content as needed.
- 7. When you're done, send your email.

EDITIONS

Available in: Lightning Experience

Available with Sales Cloud, Service Cloud, and Lightning Platform in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Lightning for Outlook

Lightning for Outlook

To access Lightning for Gmail

Lightning for Gmail

To create email templates

Send Email

To update email templates

 Modify All Data or template ownership

Use Salesforce Classic Email Templates in Microsoft® Outlook® and Gmail

Save your reps time and maintain consistent messaging for customers. Email templates in Salesforce Classic are available to reps using Lightning for Outlook or Lightning for Gmail. Reps can further boost productivity by accessing shared Classic templates from their email application. To let your reps include Salesforce records in the email messages, add merge fields to the templates.

- 1. Create a Salesforce Classic template in text, HTML, or custom format.
 - ? Tip: Reps can also save an email they are composing as a template directly from Lightning for Outlook and Lightning for Email. However, if you want to include an attachment as part of the template, create the template in Salesforce.
- **2.** In your email application, start composing an email and specify its recipients.
- 3. In your email application pane, click **Email Template**.
- **4.** Select the Classic template you want to use for the email you're composing.
- **5.** After the template appears in the email body, modify the email content as needed.
- **6.** When you're done, send your email.

EDITIONS

Available in: Salesforce Classic

Available with Sales Cloud, Service Cloud, and Lightning Platform in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Lightning for Outlook

Lightning for Outlook

To access Lightning for Gmail

Lightning for Gmail

To create email templates

Send Email

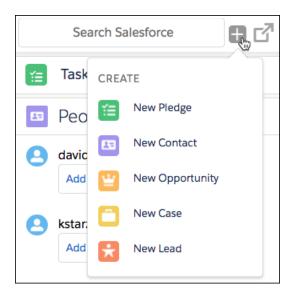
To update email templates

 Modify All Data or template ownership

Email Application Publisher Layouts

Salesforce admins can set up Lightning for Outlook, Lightning for Gmail, or Salesforce for Outlook users to create accounts, cases, leads, opportunities, and even custom objects directly from their email applications. Reps create records using actions menus, which you set up from Salesforce. Your company's Salesforce edition determines how you set up action menus and whether you can customize them.

You can set up action menus for reps working from Lightning for Outlook, Lightning for Gmail, and Salesforce for Outlook.



Follow these steps to set up action menus for reps to access from their email applications.

- 1. Create Quick Actions for Email Application Action Menus.
- 2. Add actions to the appropriate publisher layout.
 - If you're working from Contact Manager, Group, or Professional Edition, Add Actions to Global Publisher Layout. These actions
 are display for all action menus that use the global publisher layout. However, reps see only Create a Record actions
 from their email applications.
 - If you're working from Enterprise, Performance, Unlimited, or Developer Edition, you Customize Action Menus for Email Applications by creating publisher layouts specifically for email applications. You can create multiple layouts to give different reps access to different actions.
- 3. Give reps access to their action menus.
 - If you're working from Contact Manager, Group, or Professional Edition, Assign Global Publisher Layouts to User Profiles.
 - If you're working from Enterprise, Performance, Unlimited, or Developer Edition, Assign Email Application Publisher Layouts to User Profiles.

Create Ouick Actions for the Salesforce Side Panel Publisher

Take the first step in preparing your Salesforce for Outlook users to create records directly from the Salesforce Side Panel. You'll set up Create a Record global quick actions for each kind of record you want to appear in users' Side Panel Publisher menus.

EDITIONS

Lightning for Outlook, Lightning for Gmail, and Salesforce for Outlook are available from both Salesforce Classic and Lightning Experience

Action menus are available in: **All** Editions

Customizable email application action menus are available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create actions, customize, and assign email application action menus:

Customize Application

To view email application publisher layouts:

 View Setup and Configuration

Customize Email Application Action Menus

Take the second step in preparing reps to create records directly from Lightning for Outlook, Lightning for Gmail, or Salesforce for Outlook. You can create multiple layouts to give different reps access to different actions.

Assign Email Application Publisher Layouts to User Profiles

Enterprise, Performance, Unlimited, and Developer Editions let you customize the action menus for Outlook or Gmail using email application publisher layouts. After you've created the email application publisher layout, give your users access by assigning it to their user profiles.

SEE ALSO:

View and Work with Salesforce Records from Microsoft® Outlook®

Create Quick Actions for the Salesforce Side Panel Publisher

Take the first step in preparing your Salesforce for Outlook users to create records directly from the Salesforce Side Panel. You'll set up Create a Record global quick actions for each kind of record you want to appear in users' Side Panel Publisher menus.

The Salesforce Side Panel Publisher is a menu that lets users create accounts, cases, contacts, leads, opportunities or custom objects records directly from the side panel. You'll choose which quick actions appear in users' side panel publisher menus by creating global Create a Record actions for each kind of record.



Note: You can use global actions for several types of publisher menus found in Salesforce, like the ones for the Home page or the Chatter tab. If you've already set up global Create a Record actions for the kinds of records you want available to your users, there's no need to set up the actions again—you'll find these actions already available to add to all publisher layouts.

If you haven't created global Create a Record actions for the kinds of records you want available to your users, you'll have to do so now.

- From Setup, enter Global Actions in the Quick Find box, then select Global Actions.
- 2. Click New Action.
- **3.** Select Action Type**Create a Record**.

 Only Create a Record actions appear in the side panel publisher menu.
- 4. Select a Target Object for the type of record you want available to users with this action.

 If the Target Object requires a Record Type, make sure that the users you'll assign to this action also have access to that record type.
- **5.** Enter a Label for the new action that tells your users what it does.
- 6. Click Save.
- 7. From the Action Layout Editor, drag the fields you want to appear on the side panel publisher record detail page.

 If any of these fields are marked as required for this type of record elsewhere in your organization, make sure to include the fields in this action, too. This is because Salesforce won't let your users save records from the side panel publisher if the required fields aren't included in the record detail. The action layout editor displays red asterisks next to required fields.

After creating your Create a Record actions, the next step to setting up the side panel publisher for your users is to add your global actions to the appropriate side panel publisher layout. If you're working from Contact Manager, Group, or Professional Edition,

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To set up global quick actions:

Customize Application

To display the Salesforce Side Panel:

 Side Panel in Outlook configurations Add Actions to Global Publisher Layout. If you're working from Enterprise, Performance, Unlimited, or Developer Edition, you Customize Action Menus for Email Applications by creating publisher layouts specifically for email applications.

SEE ALSO:

Email Application Publisher Layouts
Customize Email Application Action Menus

Customize Email Application Action Menus

Take the second step in preparing reps to create records directly from Lightning for Outlook, Lightning for Gmail, or Salesforce for Outlook. You can create multiple layouts to give different reps access to different actions.

Before you can customize email application action menus for your reps, make sure you Create Quick Actions for Email Application Action Menus.

Enterprise, Performance, Unlimited, and Developer Editions let you customize the action menus that display in your reps' email applications. You can do this by adding quick actions to email application publisher layouts. In addition, you can create multiple email application layouts so that reps with different job responsibilities can see only the quick actions that they need. For example, maybe your sales reps need to create contacts, leads, and opportunities, but your service reps need to create contacts and cases.

Follow these steps to customize action menus for email applications.

- 1. From Setup, use the Quick Find box to search for settings for your email integration feature. Search for Lightning for Outlook or Lightning for Gmail for those features. For Salesforce for Outlook, search for Outlook Configurations.
- 2. Under Email Application Publisher Layouts, click **New**. Give your new layout a name, and then click **Save**.
- **3.** Drag the quick actions that you want into the Quick Actions in the Salesforce Classic Publisher section. For help using the publisher, see Add Actions to Global Publisher Layouts.

After you add actions to your email application publisher layout, the final step to setting up email application action menus is to give users access. If you're working from Enterprise, Performance, Unlimited, or Developer Edition, Assign Email Application Publisher Layouts to User Profiles.

SEE ALSO:

Email Application Publisher Layouts
Assign Global Publisher Layouts to User Profiles
Assign Email Application Publisher Layouts to User Profiles

EDITIONS

Lightning for Outlook, Lightning for Gmail, and Salesforce for Outlook are available from both Salesforce Classic and Lightning Experience

Action menus are available in: **All** Editions

Customizable email application action menus are available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create actions, customize, and assign email application action menus:

Customize Application

To view email application publisher layouts:

 View Setup and Configuration Sales Productivity My Unresolved Items

Assign Email Application Publisher Layouts to User Profiles

Enterprise, Performance, Unlimited, and Developer Editions let you customize the action menus for Outlook or Gmail using email application publisher layouts. After you've created the email application publisher layout, give your users access by assigning it to their user profiles.

If you're working from Contact Manager, Group, or Professional Edition, Assign Global Publisher Layouts to User Profiles. For all other editions, assign Email Application Publisher Layouts by following these steps.

- From Setup, use the Quick Find box to search for settings for your email integration feature.
 Search for Lightning for Outlook or Lightning for Gmail for those features. For
 Salesforce for Outlook, search for Outlook Configurations.
- 2. Under Email Application Publisher Layouts, click **Publisher Layout Assignment** > **Edit Assignment**.
- **3.** Select a user profile by clicking anywhere on its row in the table.
- **4.** From the Publisher Layout to Use drop-down, select the layout that you want to assign to the profile.
- 5. Click Save.

EDITIONS

Lightning for Outlook, Lightning for Gmail, and Salesforce for Outlook are available from both Salesforce Classic and Lightning Experience

Action menus are available in: **All** Editions

Customizable email application action menus are available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create actions, customize, and assign email application action menus:

Customize Application

To view email application publisher layouts:

 View Setup and Configuration

My Unresolved Items

When you use Salesforce for Outlook, Lightning Sync, or Email to Salesforce to sync items or add emails from your email app to Salesforce, any items that these features can't automatically assign to Salesforce records appear in My Unresolved Items.

As part of your daily routine, you'll use this page to manage the unresolved items that require your attention. Recurring events do not appear on the My Unresolved Items page. Instead, you can go directly to the recurring events in your calendar to associate the recurring events with Salesforce records.

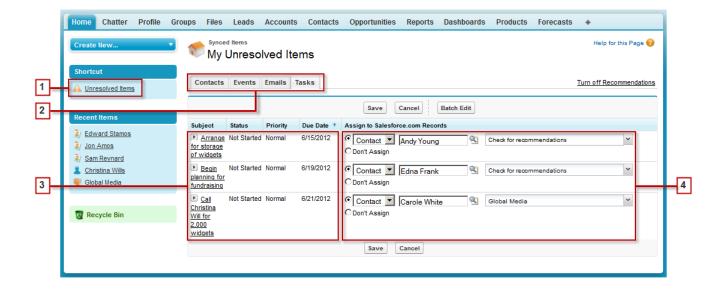
EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience (only when prompted to resolve Salesforce for Outlook items from the Windows system tray)

Available in: All Editions

Sales Productivity

My Unresolved Items



- 1. Easily access the My Unresolved Items page using the **Unresolved Items** shortcut on the sidebar.
- 2. Quickly review unassigned items by type using the tabs Contacts, Events, and Tasks.
- 3. View your unassigned items.
- **4.** Assign your items to Salesforce records—either manually or using Salesforce recommendations—or confirm you want to leave them unassigned.

Using Features that Make Resolving Items Easy

The following features help you resolve items quickly and easily.

| То | Use the feature | This feature helps you save time because | |
|---|-----------------|--|--|
| Assign multiple items simultaneously | Batch Edit | You can assign up to 50 items in any one queue simultaneously. | |
| Have Salesforce provide recommendations | Recommendations | Salesforce provides recommendations for accounts, cases, and opportunities to which you can assign your items. If you don't want to see these recommendations, click the Turn off Recommendations link. If you change your mind, click the Turn on Recommendations link. | |
| | | Recommendations display only when you select a contact from the lookup and the related list is empty. Salesforce displays recommendations based on the following criteria. | |
| | | • Accounts: The contact has either an account as the parent, or a contact role in the account. | |
| | | • Cases: The contact is related to the case. | |
| | | • Opportunities: The contact has a contact role in the opportunity. | |

Sales Productivity My Unresolved Items

Resolving Your Synced Contacts

When contacts sync from your email app with Salesforce for Outlook or Lightning Sync, some contacts are automatically assigned to accounts based on their company. The rest are added to My Unresolved Items, where you can either assign contacts to Salesforce accounts or confirm that you want to leave them unassigned.

Resolving Your Synced Events

Resolving Your Synced Outlook Tasks

SEE ALSO:

Resolving Your Synced Outlook Tasks **Resolving Your Synced Contacts** Resolving Your Synced Events

Resolving Your Synced Contacts

When contacts sync from your email app with Salesforce for Outlook or Lightning Sync, some contacts are automatically assigned to accounts based on their company. The rest are added to My Unresolved Items, where you can either assign contacts to Salesforce accounts or confirm that you want to leave them unassigned.

- 1. Access your unresolved contacts from the sidebar shortcut **Unresolved Items**.
- 2. Resolve each contact in any of these ways.
 - Assign an account.
 - Select an account under Choose Suggested Account in the drop-down list. We suggest accounts only if we detect possible matches based on the contact's company. Suggested accounts always show the Account Name field and the first three additional fields defined in your account search layout. If your organization has contact lookup filters that prevent certain accounts from being assigned to contacts, those accounts won't appear as suggested accounts and can't be assigned to contacts.
 - Select Search Salesforce.com.... In the lookup, either click **New**, enter account information, and click **Save**, or enter search criteria, click **Go!**, and click the right account. If you don't see the lookup, you may need to first allow popups from Salesforce.
 - Leave unassigned—Select Don't Assign New Account from the drop-down list if you want to confirm that a contact with no account should remain unassigned. Unassigned contacts aren't related to Salesforce records and are visible to you and your administrator only.
 - Choose an account if there's a conflict—If the email contact and Salesforce contacts' companies are different, click Don't Assign New Account in the drop-down list to overwrite one with the other. The Salesforce account overwrites the email contact company if Salesforce is set to win, and the email contact overwrites the Salesforce account if the email contact is set to win.
 - Cancel a selection—Select —None Selected—from the drop-down list.

EDITIONS

Available in both Salesforce Classic (not available in all orgs) and Lightning Experience (only when prompted to resolve Salesforce for Outlook items from the Windows system tray)

Available in: All Editions

USER PERMISSIONS

To view or edit unresolved contacts:

Edit on contacts and Read on accounts

AND

Sync enabled for contacts

To create new accounts:

Edit on contacts and Create on accounts

AND

Show Quick Create

3. Click Save to save your changes. All modified items are removed from the list. Remaining items continue to sync, and you can return any time to resolve them. Clicking **Cancel** cancels all changes on the page. Every contact assigned to an account now appears on the Contacts related list for that account.

Sales Productivity My Unresolved Items



Note: You can also resolve a contact from the contact record by marking it private or by assigning it to an account.

Your unresolved contacts list works like a standard list view. Click **Edit** or **Create New View** to define filters and customize columns.

SEE ALSO:

My Unresolved Items

How Your Contacts Sync with Salesforce for Outlook

Resolving Your Synced Events

When non-recurring events sync from your email app with Salesforce for Outlook or Lightning Sync, they appear in your Salesforce calendar and on the My Unresolved Items page. Use this page to either assign events to related Salesforce records or confirm that you want to leave them unassigned.



Note: Recurring events do not appear on the My Unresolved Items page. Instead, you can go directly to the recurring events in your calendar to associate the recurring events with Salesforce records.

- 1. Access your unresolved events from the sidebar shortcut **Unresolved Items**.
- 2. Depending on how you want to resolve an event, choose either of these actions.
 - Assign to related records—Enter a related record in one or both fields. If you need to, first
 select the correct record type from the drop-down list. If you assign a lead, you can't assign
 additional records. Clear an entry to cancel an assignment.
 - Leave unassigned—Click **Don't Assign**. Unassigned events, such as internal meetings or personal appointments, aren't linked to any other records and are visible to you only.
- 3. Click Save to save your changes. All modified items are removed from the list. Remaining items continue to sync, and you can return any time to resolve them. Clicking Cancel cancels all changes on the page. The event is added to the associated record's Activity History or Open Activities related list. You can't save changes if your events have a required custom field or an activity custom field becomes required after items are added to your unresolved events list.
- Note: You can also resolve an event from the event record by marking it private or by assigning it to other Salesforce records using the Related To and Name fields. Assigned and private events are automatically removed from your unresolved events list. Click next to the subject to see an event's description.

SEE ALSO:

My Unresolved Items

How Events Sync with Salesforce for Outlook

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience (only when prompted to resolve Salesforce for Outlook items from the Windows system tray)

Available in: All Editions

USER PERMISSIONS

To view or edit unresolved events:

 Edit on events and Read on the objects you assign to events

AND

Sync enabled for events

To create new Salesforce records:

Edit on events

AND

Show Quick Create and Create on those objects

To see recently used data in the related records fields:

 Lookup Auto-Completion in Search Settings

Resolving Your Synced Outlook Tasks

When tasks sync from Outlook with Salesforce for Outlook, they appear on the My Unresolved Items page. Use this page to either assign tasks to related Salesforce records or confirm that you want to leave them unassigned.

- 1. Access your unresolved tasks from the sidebar shortcut **Unresolved Items**.
- 2. Depending on how you want to resolve a task, choose either of these actions.
 - Assign to related records—Enter a related record in one or both fields. If you need to, first
 select the correct record type from the drop-down list. If you assign a lead, you can't assign
 additional records. Clear an entry to cancel an assignment.
 - Leave unassigned—Click **Don't Assign**. Unassigned tasks, such as internal meetings or
 personal appointments, aren't linked to any other records and are visible to you only.
- 3. Click Save to save your changes. All modified items are removed from the list. Remaining items continue to sync, and you can return any time to resolve them. Clicking Cancel cancels all changes on the page. The task is added to the associated record's Activity History or Open Activities related list. You can't save changes if your tasks have a required custom field or an activity custom field becomes required after items are added to your unresolved tasks list.
- Note: You can also resolve a task from the task record by assigning it to other Salesforce records using the Related To and Name fields. Assigned tasks are automatically removed from your unresolved tasks list.

SEE ALSO:

My Unresolved Items
How Tasks Sync with Salesforce for Outlook

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience (only when prompted to resolve Salesforce for Outlook items from the Windows system tray)

Available in: All Editions

USER PERMISSIONS

To view or edit unresolved tasks:

 Edit on tasks and Read on the objects you assign to tasks

AND

Sync enabled for tasks

To create new Salesforce records:

Edit on tasks

AND

Show Quick Create and Create on those objects

To see recently used data in the related records fields:

Lookup Auto-Completion in Search Settings

Salesforce for Outlook

Sync contacts, events, and tasks between your desktop-based version of Outlook and Salesforce. Select an email in Outlook to see related Salesforce records, like leads, contacts, tasks, and opportunities. And relate that email to the Salesforce records of your choice.

(1) Important: Starting in Winter '19, if you never set up Salesforce for Outlook or your reps aren't regularly working with it, service is no longer available. But don't fret: Our next-generation products, Lightning for Outlook and Lightning Sync, are better than ever and ready to serve you. Check out the Outlook Integration Trail for product details and setup instructions.

Watch a Demo: Getting Started with Salesforce for Outlook (English only)

EDITIONS

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

Available in: All Editions

Salesforce for Outlook, a Microsoft[®] Outlook[®] integration application that you install, syncs contacts, events, and tasks between Outlook and Salesforce. In addition to syncing these items, you can add Outlook emails, attachments, events, and tasks to multiple Salesforce contacts, and view Salesforce records related to the contacts and leads in your emails and events—all directly in Outlook.

You may be able to customize what you sync and the sync directions between Outlook and Salesforce. Your administrator determines the level at which you can customize these settings in Salesforce.

Here's a quick look at how Salesforce for Outlook helps you avoid duplicating your work and boost your productivity.



For a start-to-finish Salesforce for Outlook setup guide, see Getting Microsoft® Outlook® and Salesforce in Sync. Get Started with Salesforce for Outlook

Salesforce for Outlook Supported Languages

Salesforce for Outlook System Requirements

Confirm that your computing systems meet these system requirements before you download and install Salesforce for Outlook.

View and Work with Salesforce Records from Microsoft® Outlook®

Use Salesforce for Outlook to get insight into Salesforce contacts and leads related to your important Outlook emails—directly in Outlook. The Salesforce Side Panel displays Salesforce records to which you can add Outlook emails, events, and tasks.

Syncing Between Microsoft® Outlook® and Salesforce

Stop duplicating your contacts, events, and tasks in Outlook and Salesforce and start syncing between the two systems with Salesforce for Outlook.

Create Cases from the Outlook Ribbon with Salesforce for Outlook

Outlook Configurations and Email Application Publisher Layouts

To set up your Salesforce for Outlook users with the settings they need, create Outlook configurations and email application publisher layouts. With Outlook configurations, you can choose how your reps sync contacts, events, and tasks between Microsoft Outlook and Salesforce, or how reps can access Salesforce content from the Salesforce Side Panel in Outlook. With email application publisher layouts, set up your reps to create Salesforce records directly from the Salesforce Side Panel. To create Outlook configurations and email application publisher layouts from Setup, enter Outlook Configurations in the Quick Find box, then select

Outlook Configurations.

Set Up Salesforce for Outlook on Your Desktop

Set Up Salesforce for Outlook on your Microsoft® Windows® desktop. That way, you can work with Salesforce from earlier versions of Microsoft® Outlook®, like Microsoft Outlook 2010.

Manage How Microsoft® Outlook® Items Sync with Salesforce

Manage your contacts, events, and tasks using Outlook categories to get your Outlook items to sync with Salesforce the way you want—by either selecting the items you'd like to sync, or syncing all your items, and selecting the items you'd like to prevent from syncing.

Access Salesforce for Outlook Settings and Tools

What's the Latest with Salesforce for Outlook?

Get access to Salesforce for Outlook release notes, videos, and guides to keep you informed about the most efficient ways to manage your Microsoft® Outlook® and Salesforce integration routine.

Salesforce for Outlook FAO

Take a look at some common questions that come up for Salesforce for Outlook.

SEE ALSO:

Salesforce for Outlook System Requirements
Download the Salesforce for Outlook Installer
Install and Set Up Salesforce for Outlook
Syncing Between Microsoft® Outlook® and Salesforce

Salesforce for Outlook Supported Languages

! Important: Starting in Winter '19, if you never set up Salesforce for Outlook or your reps aren't regularly working with it, service is no longer available. But don't fret: Our next-generation products, Lightning for Outlook and Lightning Sync, are better than ever and ready to serve you. Check out the Outlook Integration Trail for product details and setup instructions.

Salesforce for Outlook supports these languages.

- Chinese (Simplified)
- Chinese (Traditional)
- Czech
- Danish
- Dutch
- English
- German
- Finnish

EDITIONS

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

Available in: All Editions

- French
- Hebrew
- Hungarian
- Italian
- Japanese
- Korean
- Polish
- Portuguese (European)
- Romanian
- Russian
- Spanish
- Spanish (Mexico)
- Swedish
- Thai
- Turkish
- Ukrainian
- Vietnamese

The Salesforce for Outlook installer doesn't support:

- Hebrew
- Romanian
- Spanish (Mexico)
- Thai
- Vietnamese

Salesforce for Outlook System Requirements

Confirm that your computing systems meet these system requirements before you download and install Salesforce for Outlook.

[] Important: Starting in Winter '19, if you never set up Salesforce for Outlook or your reps aren't regularly working with it, service is no longer available. But don't fret: Our next-generation products, Lightning for Outlook and Lightning Sync, are better than ever and ready to serve you. Check out the Outlook Integration Trail for product details and setup instructions.

| Basic Resource | Required Version |
|---------------------------|---|
| Salesforce for Outlook | Salesforce for Outlook v3.0.0 or later after Salesforce Disables TLS 1.0 encryption protocol. |
| Default email program | Any of the following versions of Microsoft® Outlook® using Microsoft Exchange Online (part of Microsoft Office 365™) or Microsoft Exchange Server (on-premises), along with the latest updates. • 2016 (32 and 64 bit) |

EDITIONS

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

Available in: All Editions

| Basic Resource | Required Version | |
|-----------------------|--|--|
| | • 2013 (32 and 64 bit) | |
| | • 2010 (32 and 64 bit) | |
| | Salesforce for Outlook supports Outlook installed using Click-to-Run (a streaming installer for Microsoft Office). | |
| Operating system | Any of the following versions of Microsoft Windows®, along with the latest hot fixes. | |
| | • Windows 10 | |
| | Windows 8.1 (Pro and Enterprise) | |
| | • Windows 7 | |
| | For customers using Apple® Mac OS®, consider setting up Lightning for Outlook and Lightning Sync. | |
| Browser | Microsoft Internet Explorer® with TLS encryption protocol 1.1 or later enabled. Starting in January 2019, Microsoft Internet Explorer 11 is required. See "Other Requirements" for feature-specific browser limitation | |

Other Requirements

| Other Features | Requirement |
|--|---|
| Creating records using the Salesforce Side Panel Publisher | Microsoft Internet Explorer 11 |
| Server configurations | We support using these systems that connect to the Internet through a proxy server. |
| | Automatic proxy detection |
| | Manual proxy |
| | NTLM proxy authentication |
| | We don't support using: |
| | • IMAP and POP3 email servers. |
| | • Terminal servers, such as Citrix® servers. Consider setting up Lightning for Outlook and Lightning Sync. |
| | Proxy Automatic Configuration files (.pac). |
| Installers | If you're an administrator and plan to use the .msi installer, you may need to install the following tools: |
| | • Microsoft .NET Framework 4.5.2, 4.6, 4.6.1, or 4.6.2 |
| | Microsoft Visual Studio[®] 2010 Tools for Office Runtime |
| | Primary Interop Assemblies (PIA) Redistributable for your version of Microsoft Outlook |
| | Windows 7 .msi users must run the command prompt as an administrator and then launch the installer from the command line. For example: $msiexec / i \ SalesforceForOutlook.msi$. |
| Single Sign-On | We support using either: |
| | Delegated authentication |
| | Security Assertion Markup Language (SAML) with My Domain |

| Other Features | Requirement | |
|----------------|--|--|
| | We don't support using a separate online identity provider for single sign-on. | |

SEE ALSO:

Salesforce for Outlook
Install and Set Up Salesforce for Outlook
Salesforce for Outlook Supported Languages
Lightning for Outlook
Lightning Sync

View and Work with Salesforce Records from Microsoft® Outlook®

| USER PERMISSIONS | | EDITIONS |
|---|---|--|
| To display the Salesforce Side Panel in Outlook: | Side Panel in your Outlook configuration | This feature available to manage from: both |
| To add Outlook emails (including attachments), events, and tasks to Salesforce records: | Add Email in your Outlook configuration AND Enable on Email to Salesforce | Salesforce Classic and Lightning Experience Available in: All Editions |
| To add specific email attachments to Salesforce: | Allow users to select attachments in your Outlook configuration | |
| To add emails (including attachments), events, and tasks to multiple contacts: | Allow Users to Relate Multiple Contacts to Tasks and Events in Activity Settings | |
| To add emails to multiple Salesforce records that accept tasks: | Contact Salesforce Customer Support | |

Use Salesforce for Outlook to get insight into Salesforce contacts and leads related to your important Outlook emails—directly in Outlook. The Salesforce Side Panel displays Salesforce records to which you can add Outlook emails, events, and tasks.

Important: Starting in Winter '19, if you never set up Salesforce for Outlook or your reps aren't regularly working with it, service is no longer available. But don't fret: Our next-generation products, Lightning for Outlook and Lightning Sync, are better than ever and ready to serve you. Check out the Outlook Integration Trail for product details and setup instructions.

Watch a Demo: Using the Salesforce Side Panel to Work with Records in Microsoft® Outlook® (English only)

When you select an email from the Inbox or an event from the Calendar in Outlook, the Salesforce Side Panel displays related Salesforce contact and lead details directly in Outlook. After your administrator enables the side panel in your Outlook configuration, the side panel displays up to 10 contacts and leads from your email's or event's From, To, and Cc fields.

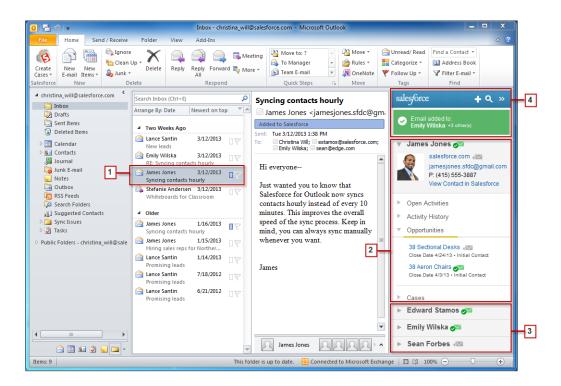
In addition, the Salesforce Side Panel:

- Displays as many as four activities, opportunities, and cases related to the contacts and leads that appear in the side panel.
- Lets you add Outlook emails and their attachments to multiple Salesforce records.

• Lets you add Outlook events and tasks to multiple contacts and to one other record with which you can relate tasks, such as an account, a case, or even a custom object record.

- Discovers duplicate contacts or leads. You choose the most appropriate ones to display in the side panel.
- Lets you create Salesforce records directly from the side panel.
- Includes a Search feature to find additional Salesforce records.
- Includes links to view full record details directly in Salesforce.

Here's how you'll use the side panel.



- 1. Select an email or event in Outlook.
- 2. Review the Salesforce content that appears in the side panel, which displays contacts and leads based on the order they appear in your email's or event's From, To, and Cc fields. For each contact and lead, it's easy to view related activities, opportunities, and cases. If you want to view full record details, just click on a record's link to open it directly in Salesforce.

To add your email or event to the Salesforce records of your choice, click and next to those records. Email attachments are included automatically when you add an email to Salesforce, unless your organization has enabled the feature that allows you to select specific email attachments. In that case, you'll see next to the individual attachments in your side panel. Click the icon to add those attachments to Salesforce.

If you have the Social Accounts and Contacts feature enabled in Salesforce, the side panel displays either Facebook® or Twitter™ profile photos—whichever ones you chose to show in Salesforce for those contacts and leads.

- 3. Select the other contacts and leads related to your email to view their details, along with related activities, cases, and opportunities.
- **4.** Quickly see the Salesforce records to which you've added emails or events. If you'd like to create a new account, case, contact, lead, opportunity, or a custom object record related to your email, click □. If you don't see records you're looking for, click □ to find other records, and then add emails, events, or tasks from the Outlook tasks list to them. There's even a collapse feature () to hide the side panel.

Add Microsoft® Outlook® Emails to Salesforce Records

Keep track of important Outlook emails related to Salesforce records from the Salesforce Side Panel.

Remove Microsoft® Outlook® Emails from Salesforce Records

You can remove Microsoft Outlook emails from your Salesforce records with the Side Panel for Salesforce for Outlook.

Add Microsoft® Outlook® Events to Salesforce Records

Add Outlook events to Salesforce records by using the Salesforce Side Panel. The event is added to the Salesforce record as an activity, which you can see on the record's Activity History or Open Activities related lists.

Add Microsoft® Outlook® Tasks to Salesforce Records

You can add Outlook tasks to multiple Salesforce contacts and to one other record that accepts tasks, like an account, a lead, or an opportunity. The task is added to the Salesforce record as an activity, which you can see on the record's Activity History or Open Activities related lists.

Create Records Directly from the Salesforce Side Panel

Quickly create different kinds of records directly from the side panel in Microsoft® Outlook®.

Searching for Salesforce Records in Microsoft® Outlook®

Get Familiar with Salesforce for Outlook

SEE ALSO:

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Add Microsoft® Outlook® Emails to Salesforce Records Create Records Directly from the Salesforce Side Panel Searching for Salesforce Records in Microsoft® Outlook®

Add Microsoft® Outlook® Emails to Salesforce Records

| USER PERMISSIONS | |
|--|---|
| To display the Salesforce Side Panel in Outlook: | Side Panel in your Outlook configuration |
| To add Outlook emails (including attachments) to Salesforce records: | Add Email in your Outlook configuration AND |
| | Enable Email to Salesforce from Salesforce Setup |
| To add specific email attachments to Salesforce: | Allow users to select attachments in your Outlook configuration |
| To add emails (including attachments), events, and tasks to multiple contacts: | Allow Users to Relate Multiple Contacts to Tasks and Events in Activity Settings |
| To add emails to multiple Salesforce records that accept tasks: | Contact Salesforce Customer Support |
| | |

EDITIONS

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

Available in: All Editions

Keep track of important Outlook emails related to Salesforce records from the Salesforce Side Panel.

Complete this procedure using the Salesforce Side Panel, a feature that's available in Salesforce for Outlook. You can learn about the side panel in View and Work with Salesforce Records from Microsoft Outlook.

1. Make sure you've set up My Email to Salesforce. From your personal settings, enter My Email to Salesforce in the Quick Find box, then select My Email to Salesforce.

- 2. In Outlook, either:
 - Select an email from your Inbox.
 - Create a new email.

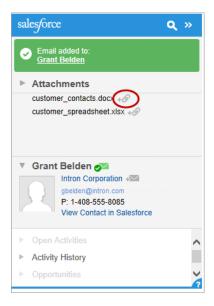
You can add an Outlook email and its attachments to multiple Salesforce records.

3. In the side panel, click for the contact, account, case, opportunity, or lead to which you want to add the email. The side panel confirms the Salesforce records to which you added your email.



If you're sending a new email, we add it to the Salesforce records after you click **Send**.

- **4.** You add attachments differently depending on how you're set up to use the side panel.
 - If the attachments section appears after you add your email to Salesforce, click or include specific email attachments on the record.



• If you don't see the option to add attachments, your attachments are included automatically when you add your email to Salesforce, or the attachment exceeded General Email Limits.

SEE ALSO:

Enable Email to Salesforce for Your Users

Searching for Salesforce Records in Microsoft® Outlook®

Remove Microsoft® Outlook® Emails from Salesforce Records

Remove Microsoft® Outlook® Emails from Salesforce Records

| USER PERMISSIONS | |
|---|---|
| To display the Salesforce Side Panel in Outlook: | Side Panel in your Outlook configuration |
| To add Outlook emails (including attachments), events, and tasks to Salesforce records: | Add Email in your Outlook configuration AND Enable on Email to Salesforce |
| To add specific email attachments to Salesforce: | Allow users to select attachments in your Outlook configuration |
| To add emails (including attachments), events, and tasks to multiple contacts: | Allow Users to Relate Multiple Contacts to Tasks and Events in Activity Settings |
| To add emails to multiple Salesforce records that accept tasks: | Contact Salesforce Customer Support |

EDITIONS

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

Available in: All Editions

You can remove Microsoft Outlook emails from your Salesforce records with the Side Panel for Salesforce for Outlook.

Complete this procedure using the Salesforce Side Panel, a feature that's available in Salesforce for Outlook. You can learn about the side panel in View and Work with Salesforce Records from Microsoft Outlook.

- 1. In Outlook, select the email you want to remove from Salesforce records.
- 2. In the Salesforce Side Panel, find the Salesforce record from which you want to remove the email. The upper section of the side panel displays the records to which you've already added your email.
- **3.** With your mouse, hover over , which turns to , then click it to remove your email from the Salesforce record. The side panel displays updates for the remaining Salesforce records to which you've added your email.



SEE ALSO:

Add Microsoft® Outlook® Emails to Salesforce Records
Searching for Salesforce Records in Microsoft® Outlook®

Add Microsoft® Outlook® Events to Salesforce Records

Add Outlook events to Salesforce records by using the Salesforce Side Panel. The event is added to the Salesforce record as an activity, which you can see on the record's Activity History or Open Activities related lists.

1. In Outlook, select an event or event series you want to add to Salesforce records. You can add an event to multiple contacts, and to one other record with which you can associate tasks, such as an account, a case, or an opportunity.

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To display the Salesforce Side Panel in Outlook:

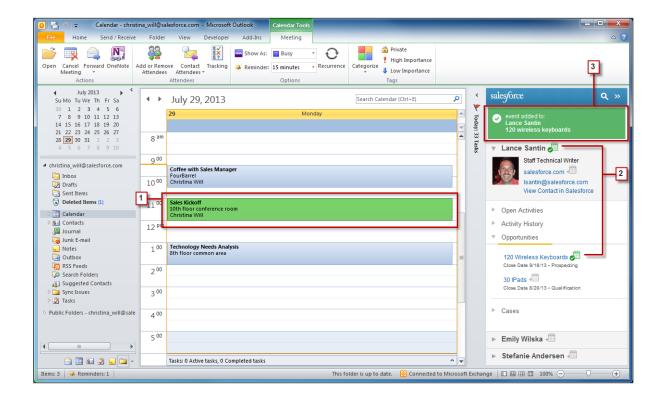
 Side Panel in your Outlook configuration

To add Outlook emails (including attachments), events, and tasks to Salesforce records:

 Add Email in your Outlook configuration

To add emails (including attachments), events, and tasks to multiple contacts:

 Allow Users to Relate Multiple Contacts to Tasks and Events in Activity Settings



- 2. In the Salesforce Side Panel, click in for the contact, account, case, opportunity, or lead to which you want to add the event. You'll see after you add the event.
- **3.** Review the Salesforce records to which you added your event.

Add Microsoft® Outlook® Tasks to Salesforce Records

You can add Outlook tasks to multiple Salesforce contacts and to one other record that accepts tasks, like an account, a lead, or an opportunity. The task is added to the Salesforce record as an activity, which you can see on the record's Activity History or Open Activities related lists.

Add Outlook tasks to Salesforce records from Tasks in Microsoft Outlook.

- 1. Select the task that you want to add to a Salesforce record.
- 2. Click \(\text{in the side panel to display the Salesforce record to which you'd like to add the task.} \)
- **3.** Click next to the record in the search results.

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To display the Salesforce Side Panel in Outlook:

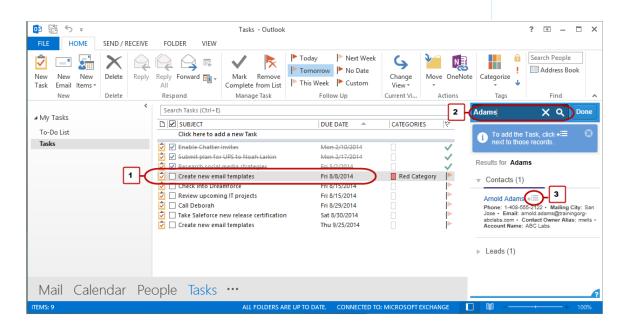
 Side Panel in your Outlook configuration

To add Outlook emails (including attachments), events, and tasks to Salesforce records:

 Add Email in your Outlook configuration

To add emails (including attachments), events, and tasks to multiple contacts:

 Allow Users to Relate Multiple Contacts to Tasks and Events in Activity Settings



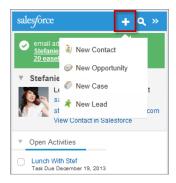
You'll see 🥃 after you add the task.

Create Records Directly from the Salesforce Side Panel

Quickly create different kinds of records directly from the side panel in Microsoft® Outlook®.

Depending on how your administrator set up your Salesforce Side Panel Publisher access, you can create accounts, cases, contacts, leads, opportunities, and other types of records customized for your organization—directly from the side panel.

Select an email in Outlook, then click .
 You'll see something like this.



2. Choose an action.

The actions available to you depend on the ones your administrator set up, such as New Contact.

3. Complete the record detail by providing relevant details.

EDITIONS

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

Available in: All Editions

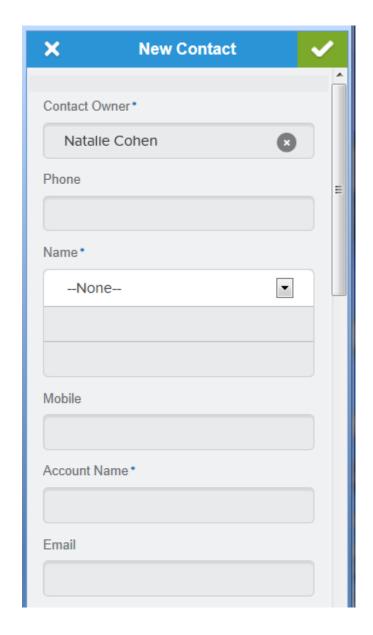
USER PERMISSIONS

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



4. Click **v** to save the record.

Keep in mind that email attachments aren't included in the created records.

Searching for Salesforce Records in Microsoft® Outlook®

| USER PERMISSIONS | |
|---|--|
| To display the Salesforce Side Panel in Outlook: | Side Panel in your Outlook configuration |
| To add Outlook emails (including attachments), events, and tasks to Salesforce records: | Add Email in your Outlook configuration AND |
| | Enable on Email to Salesforce |
| | |

EDITIONS

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

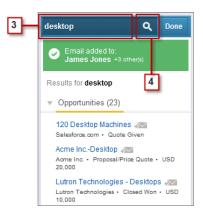
Available in: **All** Editions

| To add specific email attachments to Salesforce: | Allow users to select attachments in your Outlook configuration |
|--|--|
| To add emails (including attachments), events, and tasks to multiple contacts: | Allow Users to Relate Multiple Contacts to Tasks and Events in Activity Settings |
| To add emails to multiple Salesforce records that accept tasks: | Contact Salesforce Customer Support |

Complete this procedure using the Salesforce Side Panel, a feature that's available in Salesforce for Outlook. You can learn about the side panel in View and Work with Salesforce Records from Microsoft® Outlook®.

When you're viewing details that appear in the Salesforce Side Panel, you may want to search for additional Salesforce records. Search results display contacts and any other records with which you can associate tasks, such as a campaign, a case, or an opportunity.

- 1. From Outlook, select an email for which you want to display additional Salesforce records.
- 2. In the side panel, click .
- 3. Type your search term. For example, if you want to search for Salesforce records related to desktops, type desktop.



4. Click the search icon to display Salesforce records related to your search term.

SEE ALSO:

View and Work with Salesforce Records from Microsoft® Outlook® Add Microsoft® Outlook® Emails to Salesforce Records

Syncing Between Microsoft® Outlook® and Salesforce

Stop duplicating your contacts, events, and tasks in Outlook and Salesforce and start syncing between the two systems with Salesforce for Outlook.

| permissions needed to sync | When you sync | You'll Need |
|----------------------------------|----------------------------|--|
| Contacts | From Salesforce to Outlook | "Read" on contacts; Contacts sync direction set to Salesforce to Outlook |

EDITIONS

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

Available in: All Editions

| User permissions needed to sync | When you sync | You'll Need |
|--|---------------------------------------|---|
| | Both ways | "Read" and "Edit" on contacts, and "Read" on accounts; Contacts sync direction set to Sync both ways |
| Events and tasks From Outlook to Salesforce: | From Outlook to Salesforce: | "Read" and "Edit" on events; Events and Tasks sync direction set to Outlook to Salesforce |
| | From Salesforce to Outlook | "Read" and "Edit" on events; Events and Tasks sync direction set to Salesforce to Outlook |
| | Both ways | "Read" and Edit" on events; Events and Tasks sync direction set to Sync both ways |
| | Multiday events | "Enable Multiday Events" on activities |
| Recurring Sa | Recurring Salesforce tasks to Outlook | "Sync recurring Salesforce tasks to Outlook" |

(1) Important: Starting in Winter '19, if you never set up Salesforce for Outlook or your reps aren't regularly working with it, service is no longer available. But don't fret: Our next-generation products, Lightning for Outlook and Lightning Sync, are better than ever and ready to serve you. Check out the Outlook Integration Trail for product details and setup instructions.

Before you download and install Salesforce for Outlook, make sure your Outlook folders include the items you want to sync. If you're syncing from Outlook to Salesforce, moving a record out of a synced Outlook folder deletes that record in Salesforce. If you're syncing from Salesforce to Outlook, removing a record from Salesforce deletes that record in Outlook.

Learning about Sync Schedules

Salesforce for Outlook syncs your items based on your system activity. Events and tasks sync automatically every ten minutes; contacts sync automatically every hour. If, however, Salesforce for Outlook detects keyboard or mouse inactivity for 30 minutes, the sync frequency for events and tasks changes to 30 minutes. After two hours of inactivity, the frequency for all updates changes to hourly, and after four hours, the frequency changes to every four hours.

You can, of course, sync manually whenever you'd like. Just right-click the system tray icon (), and then click **Sync** > **Sync Now**.

Excluding Certain Records from Syncing

If you chose the Sync All Outlook Items option for your sync method during setup, you can exclude certain items from syncing in these ways.

- You can choose to sync items you mark as Private in Microsoft® Outlook®. If you don't want to sync private items, open Salesforce for Outlook Settings, and deselect the types of private items you don't want to sync.
 - If you have synced items in Outlook that you later mark as Private, those items remain in Salesforce. The corresponding Salesforce items, however, will no longer receive updates if you modify the ones in Outlook.
- If you don't want certain Outlook items to sync, regardless of whether they're marked as Private, assign them to the category *Don't Sync with Salesforce* in Outlook. For details on using categories in Outlook, refer to your Outlook documentation.

How Salesforce for Outlook Syncs Specific Items

How Your Contacts Sync with Salesforce for Outlook

How Events Sync with Salesforce for Outlook
How Recurring Events Sync with Salesforce for Outlook
How Tasks Sync with Salesforce for Outlook
Keep Microsoft® Outlook® and Salesforce tasks in sync.
Automatic Account Assignments for Synced Contacts

SEE ALSO:

How Your Contacts Sync with Salesforce for Outlook How Events Sync with Salesforce for Outlook How Tasks Sync with Salesforce for Outlook My Unresolved Items

How Your Contacts Sync with Salesforce for Outlook

[1] Important: Starting in Winter '19, if you never set up Salesforce for Outlook or your reps aren't regularly working with it, service is no longer available. But don't fret: Our next-generation products, Lightning for Outlook and Lightning Sync, are better than ever and ready to serve you. Check out the Outlook Integration Trail for product details and setup instructions.

You can keep your important Outlook and Salesforce contacts in sync using Salesforce for Outlook. When contacts initially sync, Salesforce for Outlook checks to see whether a contact with the same email address exists in both Outlook and Salesforce. If a matching email address exists, the two contacts are synced. If it doesn't exist, Salesforce for Outlook checks to see whether a contact with the same first name, last name, and company name exists. If it doesn't exist, a new contact is created and the two are synced.

Your Outlook configuration defines which items are set to sync, which direction the data flows between Outlook and Salesforce, and what happens when data conflicts. You can set up Salesforce for Outlook to sync in the following ways, depending on whether your administrator allows you to change sync directions.

- Salesforce to Outlook
- Sync both ways

Salesforce for Outlook lets you sync up to 5,000 contacts, and isn't case-sensitive when matching contacts.

This diagram shows how contacts sync.

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To sync contacts from Salesforce to Outlook:

Read on contacts

AND

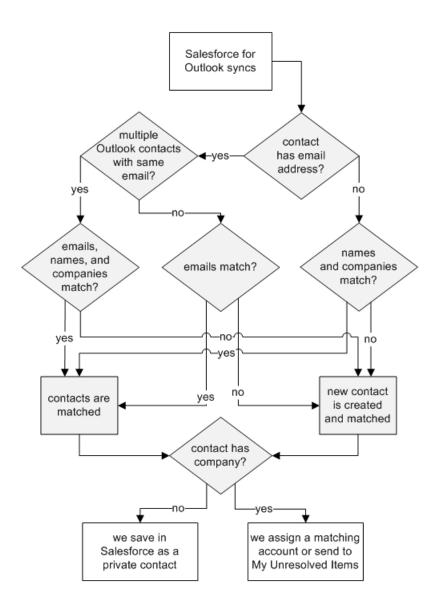
Contact sync direction set to Salesforce to Outlook

To sync contacts both ways:

 Read and Edit on contacts, and Read on accounts

AND

Contact sync direction set to Sync both ways



Syncing Contacts from Salesforce to Outlook

| If | Then |
|---|--|
| A contact already exists in Outlook | The Salesforce contact replaces the Outlook contact and the two are synced. |
| A contact doesn't yet exist in Outlook | Salesforce for Outlook syncs the Salesforce contact, which creates the contact in Outlook. |
| You delete a contact in Outlook | Salesforce for Outlook won't sync the Salesforce contact again. |
| Multiple matching contacts exist in Outlook | Salesforce for Outlook selects one of them and syncs it. |
| You update a contact in Salesforce | The Salesforce contact overwrites the Outlook contact. |

| If | Then | |
|---------------------------------|---|--|
| You update a contact in Outlook | The updates remain in the Outlook contact, but won't sync to Salesforce. The next time updates are made to the Salesforce counterpart, the Salesforce counterpart overwrites the Outlook contact. | |
| You delete a Salesforce contact | The Outlook counterpart is also deleted. If the Outlook contact is deleted and the Salesforce contact is updated, the contact is recreated in Outlook. | |

Syncing Contacts Both Ways Between Salesforce and Outlook

| If | Then |
|---|--|
| A contact exists on one side only | The contact is automatically created on the other side and the two are synced. |
| A matching contact exists | One contact record replaces the other one, and the records are synced. If your Outlook configuration specifies that Outlook contacts win, the Outlook version replaces the Salesforce version, and vice versa if Salesforce is set to win. Any change to either record is automatically reflected in the other. If records conflict, the conflict behavior setting determines which record wins. |
| Multiple matching Salesforce contacts exist | As long as there's only one version of the Outlook contact and that contact has an email address, we sync the Outlook contact with a Salesforce contact based on your matching preference, such as the contact that was most recently updated. |
| You update a contact | Both contacts are updated with the latest changes. If records conflict, the conflict behavior setting determines which record wins. |
| You delete a Salesforce contact and update an Outlook contact | The Outlook counterpart is deleted if Salesforce is set to win, and the contact is recreated in Salesforce if Outlook is set to win. |
| You delete an Outlook contact and update a Salesforce contact | The Salesforce counterpart is deleted if Outlook is set to win, and the contact is recreated in Outlook if Salesforce is set to win. |

Excluding Certain Records from Syncing

If you chose the Sync All Outlook Items option for your sync method during setup, you can exclude certain items from syncing in these ways.

- You can choose to sync items you mark as Private in Microsoft® Outlook®. If you don't want to sync private items, open Salesforce for Outlook Settings, and deselect the types of private items you don't want to sync.
 - If you have synced items in Outlook that you later mark as Private, those items remain in Salesforce. The corresponding Salesforce items, however, will no longer receive updates if you modify the ones in Outlook.

• If you don't want certain Outlook items to sync, regardless of whether they're marked as Private, assign them to the category *Don't Sync with Salesforce* in Outlook. For details on using categories in Outlook, refer to your Outlook documentation.

SEE ALSO:

Syncing Between Microsoft® Outlook® and Salesforce Resolving Your Synced Contacts

How Events Sync with Salesforce for Outlook

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You can keep your Outlook and Salesforce events in sync using Salesforce for Outlook. After an event is in Salesforce, you can assign it to related records, like contacts, accounts, opportunities, and so on. Syncing events also lets you maintain an accurate view of your availability when you create events and request meetings from your Salesforce calendar.

Which Events Sync

Your Outlook configuration defines which items are set to sync, which direction the data flows between Outlook and Salesforce, and what happens when data conflicts. The event filters in your configuration determine which events sync. The possible filters are:

- TODAY—Syncs events that end on or after today. The start time is 12:00 a.m.
- LAST MONTH—Syncs events that ended on or after the first day of last month.
- LAST N DAYS—Syncs events that ended on or after a specified number of days ago, such as LAST 30 DAYS.

Event updates stop syncing once the event falls outside of the range you're configured to sync.

The following items don't sync: all-day events beginning on the first day you're configured to sync, event attendees, and events that have occurred in the past (unless those events fall within an event filter that you've set). Multiday events sync as single events in either direction. Salesforce for Outlook syncs events based on their end dates rather than their start dates. For example, if you're syncing current and future events only, a two-day event that started yesterday still syncs.

How We Match Events

When events first sync, we either link them with existing events that have the same subject and time or create new events if nothing matches. Recurring events match according to that same logic. Additionally, Salesforce for Outlook matches recurring events only if recurrence patterns match in both Salesforce and Outlook. Otherwise, Salesforce for Outlook creates a new event.

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To sync events from Outlook to Salesforce

 Read and Edit on events, and event sync direction set to Outlook to Salesforce

To sync events from Salesforce to Outlook:

 Read and Edit on events, and event sync direction set to Salesforce to Outlook

To sync events both ways:

 Read and Edit on events, and event sync direction set to Sync both ways

To sync multiday events:

 Enable Multiday Events on activities

How You Assign Events to Salesforce records

After an event is added to Salesforce, you can assign it to other records using the My Unresolved Items page or the Related To and Name fields on the event record. The event is added to the associated record's Activity History or Open Activities related list. You can't save changes if your events have a required custom field or an activity custom field becomes required after items are added to your unresolved events list.

Who Sees Synced Events in Salesforce

Events that aren't marked as private are visible Salesforce to you, those above you in your role hierarchy, and anyone who has access to the records they're associated with. You can also grant access to view your calendar to other users, personal and public groups, roles, or roles and subordinates.

Excluding Certain Records from Syncing

If you chose the Sync All Outlook Items option for your sync method during setup, you can exclude certain items from syncing in these ways.

- You can choose to sync items you mark as Private in Microsoft® Outlook®. If you don't want to sync private items, open Salesforce for Outlook Settings, and deselect the types of private items you don't want to sync.
 - If you have synced items in Outlook that you later mark as Private, those items remain in Salesforce. The corresponding Salesforce items, however, will no longer receive updates if you modify the ones in Outlook.
- If you don't want certain Outlook items to sync, regardless of whether they're marked as Private, assign them to the category *Don't Sync with Salesforce* in Outlook. For details on using categories in Outlook, refer to your Outlook documentation.

SEE ALSO:

Syncing Between Microsoft® Outlook® and Salesforce Resolving Your Synced Events How Recurring Events Sync with Salesforce for Outlook

How Recurring Events Sync with Salesforce for Outlook

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If you're set up to sync recurring events using Salesforce for Outlook, you can sync recurrences with these patterns.

- Daily
- Weekly
- Monthly
- Yearly

After you sync recurring events to Salesforce, you can assign the recurrences to related records like contacts, accounts, opportunities, and so on. Syncing recurring events also helps you maintain an accurate view of your availability when you create events and request meetings from your Salesforce calendar.

Recurring events do not appear on the My Unresolved Items page. Instead, you can go directly to the recurring events in your calendar to associate the recurring events with Salesforce records.

Differences Between Outlook and Salesforce Recurring Events

Recurring events work differently between Outlook and Salesforce.

| For | You should know that |
|-------------------------------------|--|
| Ranges of occurrences | If your recurrences include more than 100 occurrences, Salesforce for Outlook creates the series with 100 occurrences in Salesforce. |
| | After the dates of occurrences pass, Salesforce for Outlook automatically adds another group of occurrences, bringing the total future occurrences up to 100 again. The schedule on which Salesforce adds these groups depends on the number of occurrences that passed and when you last synced, as well as whether you changed any existing occurrences. |
| Monthly occurrences | Salesforce for Outlook doesn't support the Outlook recurrence pattern option weekend day . |
| Yearly occurrences | Salesforce for Outlook lets you set up events that recur every year. If you enter a number other than 1 for the Recur every option in Outlook recurrence patterns, Salesforce for Outlook won't sync the recurring series. This mean that you can set up yearly recurrences, but not recurrences for every other year or every three years. |
| | In addition, Salesforce for Outlook doesn't support the Outlook recurrence pattern option weekend day . |
| Events lasting longer than 24 hours | Salesforce doesn't support recurring events lasting longer than 24 hours. |

EDITIONS

Set up is available from both Salesforce Classic and Lightning Experience

Recurring Events are available in Salesforce Classic only

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

USER PERMISSIONS

To sync recurring events between Outlook and Salesforce:

Recurring Events

In addition, Read and Edit on events, and event sync direction set to any of the following directions.

Outlook to Salesforce,

Salesforce to Outlook, Or

Sync both ways

Modifying Recurring Series

You can modify recurring series, but it's good to know what to avoid, so that you won't lose any details for individual event occurrences that you've modified.

You should know that If you modify Modifications are handled differently depending on which fields you modify. Recurring series in Outlook Changes to some fields are considered to be critical changes. If you make critical changes to your recurring series, the critical changes are given preference to modifications that you've previously made to individual event occurrences, and the changes you make sync with Salesforce. Critical changes to recurring events include modifications to: Appointment times (StartDateTime, Duration) Recurrence patterns (RecurrenceType, Instance, Interval, DayOfMonth, DayOfWeekMask, MonthOfYear, DayOfWeekIndex) Ranges of occurrences (Occurrences, EndDateOnly, EndKind) For example, if you modify the appointment time of a series, then later modify the appointment time for an individual event, the series appointment time modification propagates to the individually-modified event, and syncs to Salesforce. On the other hand, non-critical changes (changes to other event fields) that you make to an event series won't propagate to individually-modified events. Likewise, the non-critical changes that you make sync to Salesforce for the event series, but the individually-modified events won't sync. Start dates for recurring Salesforce doesn't support modifications to start dates that already occurred. series in Outlook End dates for recurring This is a critical change in Outlook, and will clear any modifications you make to individual occurrences series in Salesforce within the series. Those modifications won't propagate to Outlook. You can, however, modify end dates in Outlook, but that type of critical change will clear all modifications you've made to individual occurrences—in both Outlook and Salesforce. Individual occurrences You may lose those changes if you make critical changes to the recurring series. If you delete an individual event from a series, and then move the following occurrence of that event into its place, Salesforce for Outlook doesn't sync that update to Salesforce. Instead, the event that you deleted in Outlook remains in Salesforce along with the event that you moved into its place. For example, you change your recurring event in Outlook. You delete the October 4th occurrence, and move the October 5th occurrence into its place. In Salesforce, you'll see two occurrences on October 4th: the one you deleted, and the one you moved into its place. For October 5th, you'll have

no occurrences.

If you modify

You should know that

Outlook modifications propagate to individual events in Salesforce, regardless of whether the ones
in Salesforce include critical modifications. Deleted occurrences in Salesforce, however, remain
deleted, and aren't replaced with individually modified occurrences from Outlook.

SEE ALSO:

Syncing Between Microsoft® Outlook® and Salesforce Resolving Your Synced Events How Events Sync with Salesforce for Outlook

How Tasks Sync with Salesforce for Outlook

Keep Microsoft® Outlook® and Salesforce tasks in sync.

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After a task is in Salesforce, you can assign it to related records, like contacts, accounts, and opportunities.

Which Tasks Sync

Your Outlook configuration defines which items are set to sync, which direction the data flows between Outlook and Salesforce, and what happens when data conflicts. The task filters in your configuration determine which tasks sync. The possible filters are:

- TODAY—Syncs tasks that are due on or after today. The start time is 12:00 a.m.
- LAST MONTH—Syncs tasks that were due on or after the first day of last month.
- LAST N DAYS—Syncs tasks that were due on or after a specified number of days ago, such as LAST 30 DAYS.

Salesforce for Outlook doesn't sync every kind of task. These kinds of tasks sync until they fall outside of the date range set in your task filter:

- Recurring Salesforce tasks to Outlook
- Completed tasks, if marked as completed after Salesforce for Outlook syncs
- Deferred tasks
- In progress tasks
- Not started tasks
- Repeating tasks, which you create in Salesforce
- Tasks flagged for follow-up
- Waiting on someone else tasks

Which Tasks Don't Sync

- Recurring Outlook tasks to Salesforce
- Completed tasks, if marked as completed before Salesforce for Outlook syncs

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To sync tasks from Outlook to Salesforce:

 Read and Edit on tasks, and task sync direction set to Outlook to Salesforce

To sync tasks from Salesforce to Outlook:

 Read and Edit on tasks, and task sync direction set to Salesforce to Outlook

To sync tasks both ways:

 Read and Edit on tasks, and task sync direction set to Sync both ways

• Emails or contacts added to your to-do list when you flag items for follow-up (because Outlook doesn't consider these items to be tasks)

How We Match Tasks

When tasks first sync, we link them with existing tasks that have the same subject and due date. If you don't assign due dates to tasks, we link them using the same subject only.

How You Assign Tasks to Salesforce Records

After a task is added to Salesforce, you can assign it to other records using the My Unresolved Items page or the Related To and Name fields on the task record. The task is added to the associated record's Activity History or Open Activities related list. You can't save changes if your tasks have a required custom field or an activity custom field becomes required after items are added to your unresolved tasks list.

Excluding Certain Records from Syncing

If you chose the Sync All Outlook Items option for your sync method during setup, you can exclude certain items from syncing in these ways.

- You can choose to sync items you mark as Private in Microsoft® Outlook®. If you don't want to sync private items, open Salesforce for Outlook Settings, and deselect the types of private items you don't want to sync.
 - If you have synced items in Outlook that you later mark as Private, those items remain in Salesforce. The corresponding Salesforce items, however, will no longer receive updates if you modify the ones in Outlook.
- If you don't want certain Outlook items to sync, regardless of whether they're marked as Private, assign them to the category *Don't Sync with Salesforce* in Outlook. For details on using categories in Outlook, refer to your Outlook documentation.

SEE ALSO:

Syncing Between Microsoft® Outlook® and Salesforce Resolving Your Synced Outlook Tasks

Automatic Account Assignments for Synced Contacts

After syncing contacts from Outlook, Salesforce for Outlook tries to automatically assign them to accounts, as shown in this diagram.

contact has company? yes no saved as private company contact in matches salesforce.com account? yes, one yes, many no contact contact sent to assigned to unresolved salesforce.com contacts list account user user chooses specifies not to account assign removed from unresolved contacts list

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To assign accounts:

 Read on accounts and Edit on contacts

To create new accounts:

 Create on accounts and Edit on contacts

AND

Show Quick Create

This table describes the account assignment process.

| If | Then |
|--|---|
| A contact's company matches a single Salesforce account | The contact is assigned to that account. |
| A contact's company matches many Salesforce accounts or none | The contact is sent to My Unresolved Items in Salesforce, which you can access from the Contact home page or the Salesforce for Outlook system tray application. You can use this list to manually assign contacts to existing accounts, create new accounts, or confirm that contacts are private. |

| If | Then |
|---|--|
| A contact doesn't have a company name | The contact is treated as a private contact and is not sent to My Unresolved Items. |
| A contact's company changes in Outlook | If a matching account is found in Salesforce, the contact is assigned to that account. Otherwise, the contact is sent to My Unresolved Items to be resolved. |
| An unresolved contact is deleted in Outlook | The contact is removed from My Unresolved Items the next time you open the list. |
| An unresolved contact is changed in Outlook | The contact record is updated in My Unresolved Items. If the contact's company changes, Salesforce checks to see if that information matches any existing accounts and assigns it to an account if it finds a match. |

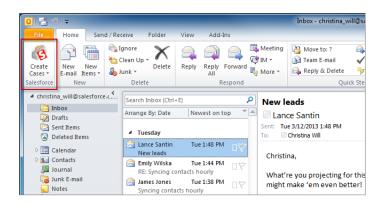
SEE ALSO:

How Your Contacts Sync with Salesforce for Outlook Resolving Your Synced Contacts Manage Your Salesforce for Outlook Configuration

Create Cases from the Outlook Ribbon with Salesforce for Outlook

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If you don't see the **Create Cases** drop-down list button in Microsoft® Outlook®, contact your administrator, who can enable this feature.



If you track cases in Salesforce, you can create new ones from your Microsoft® Outlook® emails. Your administrator needs to first create Email-to-Case destinations that appear in the drop-down list

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To include email attachments when you create cases:

 Always save email attachments in your Email to Salesforce settings

AND

Add Email in your Salesforce for Outlook Configuration

button **Create Cases** in Outlook. For each destination, you can choose the assignee, which can be either individual users or queues. When you create cases, you can add up to ten emails simultaneously for each destination.

- 1. In Outlook, select up to 10 sent or received emails and click **Create Cases**.
- 2. Select a destination from the drop-down list. Salesforce for Outlook adds the emails you selected as a case in Salesforce.

SEE ALSO:

Create Records Directly from the Salesforce Side Panel Edit Your Salesforce for Outlook Email Settings Access Salesforce for Outlook Settings and Tools

Outlook Configurations and Email Application Publisher Layouts

To set up your Salesforce for Outlook users with the settings they need, create Outlook configurations and email application publisher layouts. With Outlook configurations, you can choose how your reps sync contacts, events, and tasks between Microsoft Outlook and Salesforce, or how reps can access Salesforce content from the Salesforce Side Panel in Outlook. With email application publisher layouts, set up your reps to create Salesforce records directly from the Salesforce Side Panel. To create Outlook configurations and email application publisher layouts from Setup, enter Outlook Configurations in the Quick Find box, then select Outlook Configurations.

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Salesforce for Outlook Configurations

Salesforce for Outlook configurations include settings for the data that Salesforce for Outlook users can sync between Microsoft® Outlook® and Salesforce. Administrators can create separate configurations for different types of users, and give users permission to edit some of their own settings. For example, an opportunity team might want to sync everything, while a manager might want to sync only events.

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To view configurations:

 View Setup and Configuration

To create, edit, or delete configurations:

 Manage Email Client Configurations

In addition, you can set up your users to create, view, and work with Salesforce records directly in Outlook from the Salesforce Side Panel. The side panel allows users to easily add Outlook emails, events, and tasks to related Salesforce records. Here's how:

Using the Salesforce Side Panel to Work with Records in Microsoft® Outlook®

Email Application Publisher Layouts

Users can create accounts, cases, leads, opportunities, and even custom objects directly from the side panel using the email application actions menu. To set up your users to work with the actions menu for Salesforce for Outlook, create the quick actions that you want users to have access to, add those quick actions to the appropriate publisher layouts, and assign the publisher layouts to the right users.

Create Salesforce for Outlook Configurations

Before reps can start using Salesforce for Outlook, you define their experience by creating Outlook configurations. Outlook configurations define Salesforce for Outlook settings for reps, like which features reps have access to, and how reps' records sync between Outlook and Salesforce. If you'd like to define unique settings for a subset of your sales team, create multiple Outlook configurations, and assign reps accordingly.

Define Data Sets for Salesforce for Outlook

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.

SEE ALSO:

Salesforce for Outlook

Create Salesforce for Outlook Configurations

Define Data Sets for Salesforce for Outlook

Salesforce for Outlook Configurations for Contact Manager and Group Editions

Email Application Publisher Layouts

Create Salesforce for Outlook Configurations

Before reps can start using Salesforce for Outlook, you define their experience by creating Outlook configurations. Outlook configurations define Salesforce for Outlook settings for reps, like which features reps have access to, and how reps' records sync between Outlook and Salesforce. If you'd like to define unique settings for a subset of your sales team, create multiple Outlook configurations, and assign reps accordingly.

- 1. From Setup, enter *Outlook Configurations* in the Quick Find box, then select **Outlook Configurations**.
- 2. Click New Outlook Configuration.
- **3.** Enter a name and description of the configuration.
- **4.** Select Active to activate the configuration.
- **5.** Select Notify of product updates so that sales reps can see when upgrades for Salesforce for Outlook are available to download.
- **6.** Depending on the experience you want your reps to have, define some or all these settings.
 - Assign users and profiles
 - Email-related options for the Salesforce Side Panel, as well as add email and create cases
 - Sync direction
 - Conflict behavior
 - Field mappings
 - Matching criteria
 - Modification permissions
 - Advanced settings
- 7. Click Save.
- 8. Define data sets.

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To view configurations:

 View Setup and Configuration

To create, edit, or delete configurations:

 Manage Email Client Configurations

When first time Salesforce for Outlook users log in to Salesforce from the Salesforce for Outlook setup wizard, these settings take effect immediately. Any changes you make to active Outlook configurations take effect the next time sales reps open Outlook.

Assign Users to Salesforce for Outlook Configurations

Define Data Settings for Salesforce for Outlook

Set Up Email Options for Salesforce for Outlook

Help your sales teams track important Microsoft® Outlook® emails related to Salesforce contacts and leads. And get those contacts and leads to appear directly in Outlook.

Learn How Enabling Recurring Events Affects Salesforce for Outlook Users

Set Up Create Case for Salesforce for Outlook Users

Define Sync Directions for Your Salesforce for Outlook Users

Set sync directions for sales reps who sync contacts, events, and tasks between Microsoft® Outlook® and Salesforce.

Define Conflict Behavior for Salesforce for Outlook

Customize the Fields That Sync Between Salesforce and Microsoft® Outlook®

Customize fields in the records that your sales reps sync using Salesforce for Outlook. Also add custom Outlook or Salesforce fields you want your reps to sync.

Define Matching Criteria for Salesforce for Outlook

Define how Salesforce for Outlook handles multiple matching Salesforce contacts when a contact first syncs from Outlook.

Let Users Modify Salesforce for Outlook Settings

Assign Users' Sync Folders in Microsoft® Outlook®

You can assign your Salesforce for Outlook users' contact, event, and task sync folders in Outlook to simplify their setup process and keep sync folders consistent across your company. You can specify Outlook sync folders from Salesforce Outlook configurations.

Define Advanced Settings for Salesforce for Outlook

Salesforce for Outlook Configurations for Contact Manager and Group Editions

Learn about sync settings that come with Salesforce Contact Manager and Group editions.

SEE ALSO:

Salesforce for Outlook

Salesforce for Outlook Configurations for Contact Manager and Group Editions

Assign Users to Salesforce for Outlook Configurations

After you define basic information for a Salesforce for Outlook configuration, you select the Salesforce for Outlook users that the configuration's settings will apply to.

- 1. From Setup, enter *Outlook Configurations* in the Quick Find box, then select **Outlook Configurations**.
- If you're modifying an existing Outlook configuration, click Edit next to the one that you want to modify. Otherwise, click New Outlook Configuration, and then complete the required fields.
- **3.** In the Assign Users and Profiles section, select either *Profiles* or *Users* in the Search drop-down list.
- 4. If you don't see the member you want to add, enter keywords in the search box and click Find.
- **5.** Select members from the Available Members box, and click **Add** to add them to the group. If all available users are assigned to this configuration, the Users list is empty and you can only assign profiles.
- **6.** To remove members, select those members and click **Remove**. If removed users are assigned to another active configuration through a profile, that other configuration is used the next time they open Outlook. Otherwise, removed users are unable to use Salesforce for Outlook.
- 7. Click **Save**. All changes take effect the next time data syncs for the users in this configuration.

 If you assign a user who is already assigned to a different configuration, that user is removed from the other configuration and assigned to this one. If an assigned user is also part of a profile assigned to another active configuration, the configuration that lists the user directly is used.

SEE ALSO:

Create Salesforce for Outlook Configurations
Outlook Configurations and Email Application Publisher Layouts
Set Up Email Options for Salesforce for Outlook

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To view configurations:

 View Setup and Configuration

To create, edit, or delete configurations:

 Manage Email Client Configurations

Define Data Settings for Salesforce for Outlook

Data settings control the sync behavior and email functionality of Salesforce for Outlook. You can define the following settings using the Data Settings fields in a Salesforce for Outlook configuration.

- Email-related options for the Salesforce Side Panel, as well as add email and create cases
- Sync direction
- Conflict behavior
- Field mappings
- Matching criteria
- Modification permissions

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To view configurations:

 View Setup and Configuration

To create, edit, or delete configurations:

 Manage Email Client Configurations

Set Up Email Options for Salesforce for Outlook

Help your sales teams track important Microsoft® Outlook® emails related to Salesforce contacts and leads. And get those contacts and leads to appear directly in Outlook.

Fnable the Salesforce Side Panel

Let your sales reps see Salesforce contacts and leads that are relevant to your reps' emails and events.

- From Setup, enter Outlook Configurations in the Quick Find box, then select Outlook Configurations.
- 2. If you're modifying an existing Outlook configuration, click **Edit** next to the one that you want to modify. Otherwise, click **New Outlook Configuration**, and then complete the required fields
- 3. Select Side Panel.
- **4.** Save your changes.

Let Side Panel Sales Reps Add Emails, Attachments, Events, and Tasks to Records

The Add Email setting lets them add Outlook emails and their attachments (), events (), and tasks () to their Salesforce records directly from the side panel. You can also let your reps Allow users to select attachments (), which lets sales reps choose specific attachments to add to Salesforce, instead of automatically including them all.

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To view configurations:

View Setup and Configuration

To create, edit, or delete configurations:

 Manage Email Client Configurations

To enable Add Email, Side Panel, and Create Case:

Customize Application

- 1. From Setup, enter Outlook Configurations in the Quick Find box, then select Outlook Configurations.
- 2. If you're modifying an existing Outlook configuration, click **Edit** next to the one that you want to modify. Otherwise, click **New Outlook Configuration**, and then complete the required fields.
- 3. Select Side Panel.

- 4. Select Add Email.
- 5. To let reps choose specific attachments to add to Salesforce, select Allow users to select attachments.
- **6.** Save your changes.

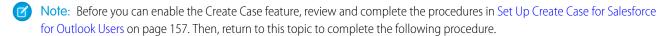
Let Users Who Aren't Working in the Side Panel Add Emails and Attachments to Records

For sales reps who don't have the side panel enabled, the Add Emails setting adds the **Add Emails** and **Send and Add** buttons to the Outlook ribbon. The setting also lets your reps add up to 10 emails simultaneously to Salesforce.

- 1. From Setup, enter Outlook Configurations in the Quick Find box, then select Outlook Configurations.
- 2. If you're modifying an existing Outlook configuration, click **Edit** next to the one that you want to modify. Otherwise, click **New Outlook Configuration**, and then complete the required fields.
- 3. Deselect Side Panel.
- 4. Select Add Email.
- 5. Save your changes.
- **6.** If you don't have My Email to Salesforce enabled, click **Enable** in the popup message to enable it.

Let Users Who Aren't Working in the Side Panel Create Cases from Outlook

For sales reps who don't have the side panel enabled, the **Create Cases** setting adds the drop-down list button to Outlook. The setting also lets your reps create Salesforce cases from Outlook emails. If you've enabled the side panel for your reps, you can give them access to the Side Panel Publisher. The publisher lets your reps create various kinds of Salesforce records directly from the side panel.



- 1. From Setup, enter Outlook Configurations in the Quick Find box, then select Outlook Configurations.
- 2. If you're modifying an existing Outlook configuration, click **Edit** next to the one that you want to modify. Otherwise, click **New Outlook Configuration**, and then complete the required fields.
- 3. Clearthe Side Panel option.
- 4. Select Create Case. Then, choose one of these links.
 - Recommended: **Choose an Existing Create Case Destination**, which lets you choose existing destinations. You can choose up to 10 destinations for each Outlook configuration.
 - **Create a New Create Case Destination**. To create one, save your work first, then create the destination. After that, return to the Outlook Configuration page to complete the Create Case setup requirements.
- **5.** Save your changes.

SEE ALSO:

Add Microsoft® Outlook® Emails to Salesforce Records
Edit Your Salesforce for Outlook Email Settings
Create Salesforce for Outlook Configurations
Assign Users to Salesforce for Outlook Configurations
Email Application Publisher Layouts

Learn How Enabling Recurring Events Affects Salesforce for Outlook Users

Your Salesforce and API users can expect the following changes after you enable the Salesforce for Outlook Recurring Events feature.

| For | You should know that |
|------------|---|
| Salesforce | Changes made to a series don't affect past events. |
| users | Changes made to the following fields in an event series override changes previously made to single events. |
| | Event start or end time |
| | All-day event |
| | Frequency |
| | Recurrence start date, if a user sends updates to invitees |
| | In addition, if users change any of those fields, all events in the series are deleted and re-created. As a result, the status of all invitees is reset to Not Responded. |
| API users | After users start syncing recurring events, the following read-only API objects appear in the API. |
| | EventRecurrenceException |
| | TaskRecurrenceException |

EDITIONS

Set up is available from both Salesforce Classic and Lightning Experience

Recurring Events are available in Salesforce Classic only

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

SEE ALSO:

Set Up Email Options for Salesforce for Outlook Outlook Configurations and Email Application Publisher Layouts

Set Up Create Case for Salesforce for Outlook Users

The Create Case feature in Salesforce for Outlook lets users create cases in Salesforce from emails in Microsoft® Outlook®. As an administrator, you can create Email-to-Case destinations that appear in the drop-down list button **Create Cases** in Outlook. For each destination, you choose the assignee, which can be either individual users or queues. You can add up to 10 destinations for each Outlook configuration. When users create cases, they can add up to 10 emails simultaneously for each destination.

Before Salesforce for Outlook users can create cases from Outlook emails, you'll need to perform the following procedures.

- 1. If you haven't already done so, enable and configure On-Demand Email-to-Case.
- 2. Define Email-to-Case destinations (also known as email routing addresses).
- 3. Enable the Create Case feature in your configurations, which adds the **Create Cases** drop-down list button in Outlook.

EDITIONS

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

Available in: **All** Editions

Salesforce for Outlook assigns a category to the emails that Salesforce for Outlook users add as cases to Salesforce. This category, Added to Salesforce as a case, makes it easy for users to search for emails they added as cases to Salesforce.

SEE ALSO:

Email Application Publisher Layouts Create Salesforce for Outlook Configurations Set Up Email Options for Salesforce for Outlook

Define Sync Directions for Your Salesforce for Outlook Users

Set sync directions for sales reps who sync contacts, events, and tasks between Microsoft® Outlook® and Salesforce.

- 1. From Setup, enter Outlook Configurations in the Quick Find box, then select **Outlook Configurations.**
- 2. Create or edit a configuration, and select one of these sync directions under Data Settings for each object being synced.
 - Don't sync—Outlook and Salesforce records aren't synced, and you can't select an Outlook folder to sync within the setup wizard.
 - Salesforce to Outlook—When data first syncs, a record in Salesforce creates or updates a record in Outlook. During future syncs, changes made to Salesforce records appear in Outlook, regardless of whether the Outlook version of the record has changed. In addition, deleting a synced record in Salesforce deletes its Outlook counterpart. Outlook changes are never sent to Salesforce. The required conflict behavior setting for this option is Salesforce always wins.
 - Outlook to Salesforce—During its first sync, a record in Outlook creates or updates a record in Salesforce. During future syncs, changes made to Outlook records appear in Salesforce, regardless of whether the Salesforce version has changed. In addition, deleting a synced record in Outlook deletes its Salesforce counterpart. Salesforce changes are never sent to Outlook. The required conflict behavior setting for this option is Outlook always wins. This option
 - isn't available for contacts.
 - Sync both ways—When records sync, changes to Outlook and Salesforce sync between the two systems. If records conflict, the conflict behavior setting determines which record wins.
- **3.** Click **Save**. All changes take effect the next time data syncs for the users in this configuration.
- **4.** Define a data set for each object that has a sync direction.

SEE ALSO:

Outlook Configurations and Email Application Publisher Layouts Set Up Email Options for Salesforce for Outlook Create Salesforce for Outlook Configurations Define Data Sets for Salesforce for Outlook

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To view configurations:

View Setup and Configuration

To create, edit, or delete configurations:

Manage Email Client Configurations

Define Conflict Behavior for Salesforce for Outlook

Conflict behavior settings determine what happens when Salesforce for Outlook encounters a conflict when syncing data both ways. A conflict occurs when the same record is updated in both Salesforce and Outlook or when a record is updated on one side and deleted on the other.

- 1. From Setup, enter *Outlook Configurations* in the Quick Find box, then select **Outlook Configurations**.
- **2.** Edit a configuration, and select one of the following conflict behaviors under Data Settings for Contacts, Events, and Tasks.
 - Salesforce always wins
 - Outlook always wins
- **3.** Click **Save**. All changes take effect the next time data syncs for the users in this configuration.

SEE ALSO:

Outlook Configurations and Email Application Publisher Layouts
Create Salesforce for Outlook Configurations
Customize the Fields That Sync Between Salesforce and Microsoft® Outlook®
Define Sync Directions for Your Salesforce for Outlook Users

Customize the Fields That Sync Between Salesforce and Microsoft® Outlook®

Customize fields in the records that your sales reps sync using Salesforce for Outlook. Also add custom Outlook or Salesforce fields you want your reps to sync.

Field mappings define which Salesforce and Outlook fields correspond when items sync between the two systems. Salesforce comes with a set of default mappings. Decide whether to let your sales reps edit their own field mappings in their personal settings.

Map these custom field types.

- Outlook text fields
- Salesforce text fields
- Some Salesforce picklist fields

Edit default field mappings or set up custom field mappings for your reps.

- From Setup, enter Outlook Configurations in the Quick Find box, then select Outlook Configurations.
- **2.** Select an Outlook Configuration you'd like to edit, or create a new one.
- Under Data Settings, click Edit Field Mappings under Contacts, Events, or Tasks to display all the fields for records on that object.
- **4.** Review which Salesforce fields are mapping to each Outlook field.
- **5.** Edit the Salesforce or Outlook field mappings you'd like to change, or create mappings for custom fields. Salesforce for Outlook lets you edit any field mapping with a picklist. You can add more mappings at the bottom of the list. You can remove mappings by clicking the X next to the mapping.

Warning: If you map a custom field that is universally required, make sure that it has a default value to avoid errors. Also, mapping custom fields that require validation by Salesforce can cause sync errors. For example, you map a custom Salesforce field that requires a unique value. If you enter a non-unique value in the Outlook field, you receive a sync error.

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To view configurations:

 View Setup and Configuration

To create, edit, or delete configurations:

 Manage Email Client Configurations

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To view configurations:

View Setup and Configuration

To create, edit, or delete configurations:

 Manage Email Client Configurations

6. Click Save. Field mappings begin syncing on items the next time those items are updated in either Salesforce or Outlook.

SEE ALSO:

Create Salesforce for Outlook Configurations
Outlook Configurations and Email Application Publisher Layouts
Define Matching Criteria for Salesforce for Outlook
Define Conflict Behavior for Salesforce for Outlook

Define Matching Criteria for Salesforce for Outlook

Define how Salesforce for Outlook handles multiple matching Salesforce contacts when a contact first syncs from Outlook.

- 1. From Setup, enter *Outlook Configurations* in the Quick Find box, then select **Outlook Configurations**.
- **2.** Edit a configuration, and select one of these matching criteria options under Data Settings for contacts.
 - Most recent activity—Choose the Salesforce contact that shows the most recent
 activity (such as a phone call or email), as shown in the contact's Activity History related
 list. This option is the default matching criteria.
 - Last updated—Choose the Salesforce contact that was most recently modified.
 - Oldest—Choose the Salesforce contact that has the earliest creation date.
- **3.** Click **Save**. All changes take effect the next time data syncs for the users in this configuration.

If we don't find a matching contact in Salesforce, we create one that syncs with the Outlook contact. We then either assign the synced contact to a Salesforce account, leave it unassigned, or place it in your sales rep's My Unresolved Items page.

SEE ALSO:

Create Salesforce for Outlook Configurations

Outlook Configurations and Email Application Publisher Layouts

Customize the Fields That Sync Between Salesforce and Microsoft® Outlook®

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To view configurations:

 View Setup and Configuration

To create, edit, or delete configurations:

 Manage Email Client Configurations

Let Users Modify Salesforce for Outlook Settings

- 1. From Setup, enter Outlook Configurations in the Quick Find box, then select **Outlook Configurations.**
- 2. Edit a configuration, and select any of the following options under Data Settings for each object being synced. You can allow users to modify:
 - Whether object is synced
 - Sync direction
 - Conflict behavior
 - Field mappings
 - Outlook folder for syncing
- **3.** Click **Save**. All changes take effect the next time data syncs for the users in this configuration.

You can overwrite users' modifications any time by selecting Overwrite configuration changes made by users in a configuration. After you save the updated configuration, the new settings replace the existing settings for users of the configuration the next time their data syncs.

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To view configurations:

View Setup and Configuration

To create, edit, or delete configurations:

Manage Email Client Configurations

Assign Users' Sync Folders in Microsoft® Outlook®

You can assign your Salesforce for Outlook users' contact, event, and task sync folders in Outlook to simplify their setup process and keep sync folders consistent across your company. You can specify Outlook sync folders from Salesforce Outlook configurations.

By default, users can change the Outlook folders where their Salesforce contacts, events, and tasks sync from the Settings menu in their Salesforce for Outlook system tray. You can prevent users from changing their Outlook sync folders when you clear this default setting for contacts, events, and tasks, and assign specific Outlook sync folders from users' Outlook configurations.

- Note: Assigning Outlook sync folders might create Outlook directory folders for all of the users in your Outlook configuration. Salesforce for Outlook can't remove Outlook sync folders from your users' Outlook directories after they've been created. If you reassign a different folder later, the original folder remains in users' local Outlook directories until users delete the folder.
- 1. From Setup, enter Outlook Configurations in the Quick Find box, then select **Outlook Configurations.**
- 2. Open an Outlook configuration.
- 3. To assign a folder where users sync contacts, in Data Settings, deselect Outlook folder for
- syncing contacts on the Allow users to modify: setting.
- 4. In the text box that appears, type the name of the Outlook folder where you want your users' contacts to sync with Salesforce. Type the name of a common folder that exists in the Outlook directory for each of your users, at the same directory level as the Outlook default contacts folder. Folder names are case sensitive. If you type the name of a folder that doesn't exist at that level for each user, Salesforce creates the folder in Outlook for those users. To have Salesforce for Outlook sync with a nested Outlook folder, type a filepath, including backslashes (\).

For example, to assign the Outlook folder "sfdc_sync_contacts" as a nested directory under your users' default Outlook contacts folder, type Contacts\sfdc sync contacts in the Outlook folder for syncing contacts text box,

EDITIONS

Available for set up in: both Salesforce Classic and Lightning Experience

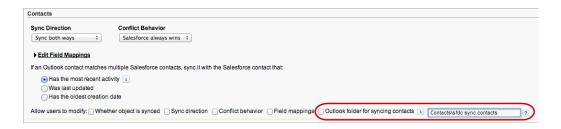
Available in: Professional, **Enterprise**, Performance, **Unlimited**, and **Developer Editions**

USER PERMISSIONS

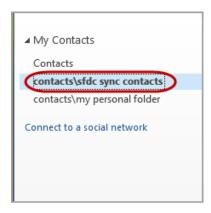
To create and edit Outlook configurations:

Configure Application

where *Contacts* is your users' default contacts folder, and *sfdc_sync_contacts* is the folder where you want your users' Salesforce contacts to sync.



If the folder exists in your users' Outlook directories, Salesforce for Outlook syncs your contacts with it. If the folder doesn't exist, Salesforce for Outlook creates a folder at "Contacts\sfdc_sync_contacts."



- 5. Click Save.
- **6.** Instruct your users to save their Salesforce for Outlook settings again to confirm the changes that you've made to their systems. To do so, instruct your users to:
 - **a.** In the settings wizard, right-click the Salesforce for Outlook icon (**3**) in their system tray, and then click **Settings**.
 - **b.** Click **Next** from Review Your Sync Direction.
 - c. Click **Next** from Control Which Outlook Items Sync.
 - **d.** Click **Save** from Syncing Private Items.

Salesforce for Outlook locates Outlook folders that exist in your users' Outlook directories or creates them for your users.

7. Instruct your users to move the Outlook contacts that they want to sync to the folder that you specified.

To change the Outlook folder locations where users sync events and tasks with Salesforce, repeat steps 3 through 7 in the events and tasks sections.

Define Advanced Settings for Salesforce for Outlook

Use advanced settings in a Salesforce for Outlook configuration to customize the default behavior of Salesforce for Outlook, such as setting the maximum size of the sync log. Click **Edit** to change the value of an advanced setting or **Remove** to remove it from the configuration.

- 1. From Setup, enter *Outlook Configurations* in the Quick Find box, then select **Outlook Configurations**.
- If you're modifying an existing Outlook configuration, click Edit next to the one that you want to modify. Otherwise, click New Outlook Configuration, and then complete the required fields.
- **3.** Click **Add Advanced Setting** in the Advanced Settings section of an Outlook configuration.
- **4.** Choose one of these settings and enter a value.

| Advanced Setting | This setting indicates |
|---------------------|---|
| HTTPTimeout | The number of seconds Salesforce for Outlook waits while trying to establish an HTTP connection with Salesforce. The value must be between 15 and 360 seconds, and the default is 30. |
| MaxLogFileSize | The maximum file size of the sync log you'll maintain. Value must be between 1 and 128 MB, and the default is 1. |
| MaxRetries | The number of times Salesforce for Outlook tries to connect to Salesforce. The value must be between 0 and 10, and the default is 3. |

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To view configurations:

 View Setup and Configuration

To create, edit, or delete configurations:

 Manage Email Client Configurations

- 5. Click OK.
- **6.** Click **Save**. All changes take effect the next time data syncs for the users in this configuration.

SEE ALSO:

Create Salesforce for Outlook Configurations
Outlook Configurations and Email Application Publisher Layouts

Define Data Sets for Salesforce for Outlook

Salesforce for Outlook Configurations for Contact Manager and Group Editions

Learn about sync settings that come with Salesforce Contact Manager and Group editions.

| The setting for | Is |
|--------------------------|--|
| Salesforce Side Panel | Enabled |
| Add Email | Enabled |
| Contacts | Sync Direction—Sync both ways Conflict Behavior—Outlook always wins |

EDITIONS

Available to set up in: both Salesforce Classic and Lightning Experience

Available in: **Contact Manager** and **Group**Editions

The setting for ls Filters Contacts: User's Records Contacts on Accounts: User's Records Contacts in Chatter: Records User is Following • Field Mapping—Default settings Matching Criteria—Most recent activity Events • Sync Direction—Sync both ways • Conflict Behavior—Outlook always wins Filters User's Records Date greater or equal to LAST 30 DAYS • Field Mapping—Default settings Tasks • Sync Direction—Sync both ways • Conflict Behavior—Salesforce always wins Filters User's Records Due date greater or equal to LAST 30 DAYS • Field Mapping—Default settings

Define Data Sets for Salesforce for Outlook

Data sets are subsets of the Salesforce records that Salesforce for Outlook users can sync. They consist of filters that limit which records sync. Each configuration must have a data set in order for users to sync with Outlook.

The Outlook Configuration detail page shows a summary of the configuration's current filters.



Note: If your company uses Platform Encryption, you can't set filters on fields you've encrypted. Otherwise, Salesforce for Outlook can't sync contacts, events, or tasks for users assigned to that configuration.

- 1. From Setup, enter Outlook Configurations in the Quick Find box, then select **Outlook Configurations.**
- 2. Click the name of an Outlook configuration.
- 3. In the Data Sets related list, click Edit.
- 4. Specify filters.
- 5. To see how many items sync with the filters you've specified, you can check the data set size.
- 6. Click Save.

Learning about Data Sets for Salesforce for Outlook

Configure Contact Filters for Salesforce for Outlook

Salesforce for Outlook Contact Filters

Enter Event Filters for Lightning Sync and Salesforce for Outlook

Create Task Filters for Salesforce for Outlook

Specify which tasks sync between Microsoft® Outlook® and Salesforce for your sales teams.

Sample Lightning Sync and Salesforce for Outlook Data Sets

Check the Size of Salesforce for Outlook Data Sets

SEE ALSO:

Sample Lightning Sync and Salesforce for Outlook Data Sets

Salesforce for Outlook Contact Filters

Outlook Configurations and Email Application Publisher Layouts

Check the Size of Salesforce for Outlook Data Sets

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To view configurations:

View Setup and Configuration

To create, edit, or delete configurations:

Manage Email Client Configurations

To create, edit, or delete data sets:

Sync Direction can't be Don't sync

Learning about Data Sets for Salesforce for Outlook

Data sets are subsets of the Salesforce records that Salesforce for Outlook users can sync. They consist of filters that limit which records sync.

Knowing What Syncs

Salesforce for Outlook syncs records based on definitions in data sets, along with records related to them.

Understanding Limits to Data Sets

When using data sets, users can sync up to 5,000 records per filter between Microsoft® Outlook® and Salesforce at a time. This means that if users have more than 5,000 records to sync based on the configuration of their data sets, Salesforce for Outlook won't sync some of them. In addition, users may find that syncing these large quantities of records may slow down the sync process. You can, however, increase the limits for the number of records users can sync. Just keep in mind that you can't reduce the likelihood of the sync process slowing down.

Increasing Limits to Data Sets

If your users are working with more than 5,000 records, you can configure their data sets so that they can sync larger quantities of records. To do this, you'll their edit data sets to include additional filters. For example, under Filter By Record Ownership in the Contact Filters section, choose **Selected Contacts**. Then, choose **User's Records** under Contacts, Contacts on Opportunities, and Contacts on Accounts. Because the data set now has three filters, your users can now sync up to 15,000 contact records.

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To view configurations:

 View Setup and Configuration

To create, edit, or delete configurations:

 Manage Email Client Configurations

To create, edit, or delete data sets:

 Sync Direction can't be Don't sync

Keep in mind that these various filters you set up won't necessarily select records that are mutually exclusive. Therefore, the sync process might not sync exactly 15,000 records. To avoid this situation, you can further refine the group of contacts you want to sync. Just define additional parameters under Filter By Additional Objects and Fields.

After defining the filters, you can get a record count for your users in the Data Set Size section. To do so, enter a user, and then click **Get Record Count**. If your users still exceed sync limits for the filters you set up, you users may find that the sync process selects records in a random fashion.

About Person Accounts

If your organization enabled person accounts and your users have more than 5,000 records in Salesforce, data sets work in a different way. Specifically, Salesforce runs a query first on person accounts that match filter criteria, and then on contacts assigned to these accounts. So it's possible for the sync process to reach the 5,000 record limit (including person accounts and contacts) and not include some of the contacts your users would expect to sync.

SEE ALSO:

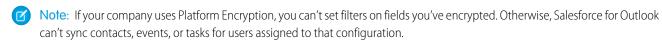
Configure Contact Filters for Salesforce for Outlook
Enter Event Filters for Lightning Sync and Salesforce for Outlook
Create Task Filters for Salesforce for Outlook
Check the Size of Salesforce for Outlook Data Sets

Configure Contact Filters for Salesforce for Outlook

| USER PERMISSIONS | | EDITIONS |
|--|------------------------------------|--|
| To view configurations: | View Setup and Configuration | This feature available to |
| To create, edit, or delete configurations: | Manage Email Client Configurations | manage from: both Salesforce Classic and |
| To filter contacts by opportunity teams: | Opportunity Team Selling | Lightning Experience |
| To filter contacts by account teams: | Account Teams | Available in: All Editions |
| To create, edit, or delete data sets: | Sync Direction can't be Don't sync | |

Data sets are subsets of the Salesforce records that Salesforce for Outlook users can sync. They consist of filters that limit which records sync. For example, you may want to let certain users sync all contacts, but let other users sync only contacts related to their opportunity teams. In addition, you can filter by the fields in the records, such as letting users sync only contacts related to specific accounts and opportunities.

The Outlook Configuration detail page shows a summary of the configuration's current filters.



- 1. Define a data set for a configuration.
- 2. Under Filter By Record Ownership, specify the contacts users can sync.
- **3.** If you choose **Selected Contacts**, you can further limit which contacts users sync.

| For | To allow users to sync | Select |
|----------------------|--|-----------------------------------|
| Contacts | All contacts that they own | User's Records |
| | All contacts they and their subordinates in the role hierarchy own | User's Team's Records |
| Contacts on | Contacts related to their opportunities | User's Records |
| Opportunities | Contacts related to opportunities that they and their subordinates in the role hierarchy own | User's Team's Records |
| | Contacts related to opportunities of which they are members of opportunity teams, but not opportunities that users own | User's Opportunity Teams' Records |
| Contacts on Accounts | Contacts related to their accounts | User's Records |
| | Contacts related to accounts they and their subordinates in the role hierarchy own | User's Team's Records |
| | Contacts related to accounts of which they are a team member, but not accounts that users own | User's Account Teams' Records |
| | | |

4. Under Filter By Additional Objects and Fields, add field-level filters you need.

- **a.** Select an object and a field within that object.
- **b.** Select the correct filter operator.
- **c.** Enter a value for the selected field.
- **5.** To add a new filter, click **Add Row**; to delete the last one in the list, click **Remove Row**.
- **6.** Under Other Contacts to Include, you can choose to have Chatter contacts automatically sync for users of this configuration. To do this, select Sync contacts users follow in Chatter.

SEE ALSO:

Salesforce for Outlook Contact Filters

Define Data Sets for Salesforce for Outlook

Check the Size of Salesforce for Outlook Data Sets

Sample Lightning Sync and Salesforce for Outlook Data Sets

Salesforce for Outlook Contact Filters

Contact filters control the number of records that Salesforce for Outlook users can sync between Outlook and Salesforce. Note the following when using contact filters.

- The criteria you specify are AND based. That is, if you specify more than one criterion, the result includes only records that match all of the criteria.
- If entering a date, use the format allowed by your Locale setting. You can also use special date values like TODAY, NEXT WEEK, NEXT YEAR, LAST <number> DAYS, and so on.
- Place quotation marks around numbers or other data that includes commas. For example
 Amount equals "10,000" returns records that have an amount of \$10,000 but
 Amount equals 10,000 returns \$10,000 as well as \$10 and \$0.

EDITIONS

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

Available in: All Editions

- When you use the "less than," "greater than," "less or equal," or "greater or equal" operators on fields that have numeric values, records with blank or "null" values are returned as if their value is zero (0).
- To limit results to records that are blank or contain "null" values for a particular field, choose the field and the "equals" or "not equal to" operators, leaving the third field blank. For example, <code>Amount equals</code> returns records with blank amount fields. You can search for blank values or other specified values at the same time. For example, <code>Amount equals 1,,2</code> returns records where the <code>Amount</code> is blank or contains the value "1" or "2". For example, if you create a workflow a filter for accounts with the criteria <code>Annual Revenue less than 100000</code>, account records match if their <code>Annual Revenue</code> is blank.
- To search for phone numbers, include the exact phone number formatting or example, Phone starts with (561).
- Separate search terms by commas to filter by more than one value. You can enter up to 80 characters, including commas and spaces. For example, to search for accounts in California, New York, or Washington, use State contains CA, NY, WA.
- When you filter on standard long text area fields, such as Description, only the first 1000 characters of the field are searched.
- You can use the **Get Record Count** button to check how many records will sync for a sample Salesforce for Outlook user based on the configuration's filters.
- If you need to reference user information in your contact filters, you can add the following merge fields to them.

| Merge Field | Description |
|-------------|--|
| \$User.ID | References the ID of the current user. This merge field can be applied to fields that contain a user lookup. The valid operators for this merge field are Equals and Not Equal To. When creating |

| Description |
|---|
| mobile view filters that reference an owner field, you can only use the \$User.ID merge field. |
| References the username of the current user. This merge field can be applied to any text or lookup field, except picklists. The valid operators for this merge field are Equals, Not Equal To, Greater Than or Equal, Less Than or Equal, Contains, Does Not Contain, and Starts With. |
| References the first name of the current user. This merge field can be applied to any text or lookup field, except picklists. The valid operators for this merge field are Equals, Not Equal To, Greater Than or Equal, Less Than or Equal, Contains, Does Not Contain, and Starts With. |
| References the last name of the current user. This merge field can be applied to any text or lookup field, except picklists. The valid operators for this merge field are Equals, Not Equal To, Greater Than or Equal, Less Than or Equal, Contains, Does Not Contain, and Starts With. |
| References the first and last name of the current user. This merge field can be applied to any text or lookup field, except picklists. The valid operators for this merge field are Equals, Not Equal To, Greater Than or Equal, Less Than or Equal, Contains, Does Not Contain, and Starts With. |
| |

SEE ALSO:

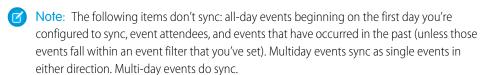
Configure Contact Filters for Salesforce for Outlook Define Data Sets for Salesforce for Outlook Check the Size of Salesforce for Outlook Data Sets

Enter Event Filters for Lightning Sync and Salesforce for Outlook

Data sets are subsets of the Salesforce records that Salesforce for Outlook users can sync. They consist of filters that limit which records sync. For example, most users may sync only current and future events, while some users may need to also sync past events. Salesforce for Outlook syncs events based on their end dates rather than their start dates. For example, if you're syncing current and future events only, a two-day event that started yesterday still syncs.

The Data Sets section of the Outlook Configuration detail page shows a summary of the configuration's current event filters.

- 1. Define a data set for a configuration.
- 2. Under Events, enter one of these filters in the Greater or equal to field.
 - TODAY—Syncs events that end on or after today. The start time is 12:00 a.m.
 - LAST MONTH—Syncs events that ended on or after the first day of last month.
 - LAST N DAYS—Syncs events that ended on or after a specified number of days ago, such as LAST 30 DAYS.
- **3.** You can use the **Get Record Count** button to check how many records will sync for a sample Salesforce for Outlook user based on the configuration's filters.
- **4.** Save the data set.



SEE ALSO:

Sample Lightning Sync and Salesforce for Outlook Data Sets Check the Size of Salesforce for Outlook Data Sets How Events Sync with Salesforce for Outlook

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To view configurations:

 View Setup and Configuration

To create, edit, or delete configurations:

 Manage Email Client Configurations

To create, edit, or delete data sets:

 Sync Direction can't be Don't sync

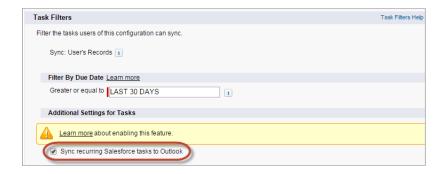
Create Task Filters for Salesforce for Outlook

Specify which tasks sync between Microsoft® Outlook® and Salesforce for your sales teams.

Data sets are subsets of the Salesforce records that Salesforce for Outlook users can sync. They consist of filters that limit which records sync. For example, most users may sync past-due tasks, while other users sync only current and future tasks. Salesforce for Outlook syncs tasks based on their due dates rather than their start dates. For example, if you're syncing current and future tasks only, a task that started yesterday still syncs.

The Data Sets section of the Outlook Configuration detail page shows a summary of the configuration's current task filters.

- 1. Define a data set for a configuration.
- 2. Under Tasks, enter one of these filters in the Greater or equal to field.
 - TODAY—Syncs tasks that are due on or after today. The start time is 12:00 a.m.
 - LAST MONTH—Syncs tasks that were due on or after the first day of last month.
 - LAST N DAYS—Syncs tasks that were due on or after a specified number of days ago, such as LAST 30 DAYS.
- **3.** Choose whether recurring Salesforce tasks sync to Outlook.



EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To view configurations:

 View Setup and Configuration

To create, edit, or delete configurations:

 Manage Email Client Configurations

To create, edit, or delete data sets:

 Sync Direction can't be Don't sync

- **4.** You can use the **Get Record Count** button to check how many records will sync for a sample Salesforce for Outlook user based on the configuration's filters.
- 5. Save the data set.
- Note: Salesforce for Outlook doesn't sync every kind of task. These kinds of tasks never sync:
 - Recurring Outlook tasks to Salesforce
 - Completed tasks, if marked as completed before Salesforce for Outlook syncs
 - Emails or contacts added to your to-do list when you flag items for follow-up (because Outlook doesn't consider these items to be tasks)

SEE ALSO:

Outlook Configurations and Email Application Publisher Layouts How Tasks Sync with Salesforce for Outlook Sample Lightning Sync and Salesforce for Outlook Data Sets

Sample Lightning Sync and Salesforce for Outlook Data Sets

Because users with the same role usually have similar data sync requirements, many administrators create sync configurations based on the positions in their organization. Below are sample data sets for common Salesforce groups. Your Salesforce for Outlook and Lightning Sync users have unique needs, but you can use these examples as a reference to help you get started creating Outlook configurations (for Salesforce for Outlook users) and Lightning Sync configurations (for Lightning Sync users).

EDITIONS

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

Available in: All Editions

Sales Manager

Sales managers usually need to see records they own and the records of the users who report to them. In addition, they need to see the latest contact information for anyone associated with

large deals in the pipeline and any upcoming meetings that might be related to these deals. They may also like to have their Chatter contacts in Outlook.

Sample Outlook Configuration for Sales Managers:

```
Contacts: User's Records, User's Team's Records
Contacts on Opportunities: User's Team's Records
Contacts on Accounts: User's Team's Records
Contacts in Chatter: Records User is Following

Events
Events: User's Records
Date greater or equal TODAY
Tasks
Tasks: User's Records
Date greater or equal TODAY
```

Sales Engineer

Sales Engineers often only need the contacts owned by them and the other members of their opportunity teams. They may also want their Chatter contacts, a record of the past month's meetings, and a schedule of all future meetings.

Sample Outlook Configuration for Sales Engineers:

```
Contacts: User's Records
Contacts on Opportunities: User's Opportunity Teams' Records
Contacts in Chatter: Records User is Following

Events
Events: User's Records
Date greater or equal LAST MONTH

Tasks
Tasks: User's Records
Date greater or equal LAST MONTH
```

Account Executive

Account executives need to see contacts related to their accounts and opportunities. The opportunities are filtered so only contacts related to open opportunities with a probability over 40% sync. They'd also like to sync their Chatter contacts, all future meetings, and all meetings from the last two months.

Sample Outlook Configuration for Account Executives:

```
Contacts on Opportunities: User's Records
  (Probability (%) greater than 40) AND (Stage not equal to Closed Won, Closed Lost Contacts on Accounts: User's Records
  Contacts in Chatter: Records User is Following

Events
  Events: User's Records
  Date greater or equal LAST 60 DAYS

Tasks
  Tasks: User's Records
  Date greater or equal LAST 60 DAYS
```

SEE ALSO:

Define Data Sets for Salesforce for Outlook

Check the Size of Salesforce for Outlook Data Sets

You can use the **Get Record Count** button to check how many records will sync for a sample Salesforce for Outlook user based on the configuration's filters. If the numbers are too high or low, you can adjust the filters and check the size again. The maximum record count is 5000 per object.

- **1.** Define a data set for a configuration.
- 2. Under Data Set Size, click the lookup icon next to the User field.
- **3.** Select a user. To test maximum size, choose a user who owns a lot of records, even one who may not be currently assigned to the configuration.
- **4.** Click **Get Record Count**. The number of records that would sync between Outlook and Salesforce for that user appear.
- **5.** Adjust the filters or selected user and retest the data set as needed. Nothing is saved until you click **Save**.

SEE ALSO:

Define Data Sets for Salesforce for Outlook

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To view Outlook data sets:

 View Setup and Configuration

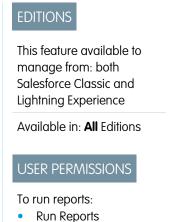
To test Outlook data sets:

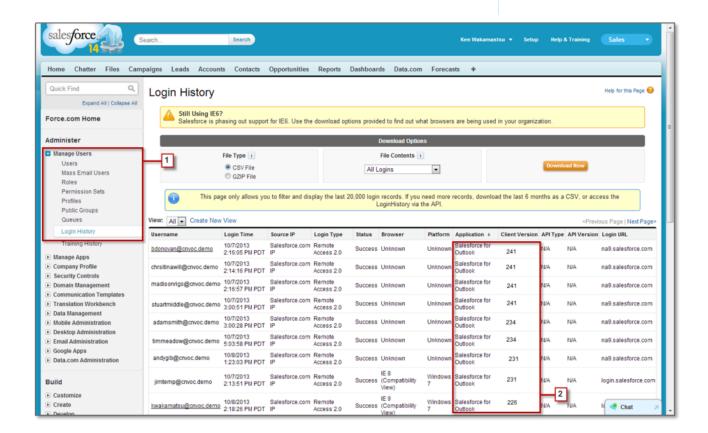
 Manage Email Client Configurations

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.

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.

SEE ALSO:

Salesforce for Outlook

Set Up Salesforce for Outlook on Your Desktop

Set Up Salesforce for Outlook on your Microsoft[®] Windows[®] desktop. That way, you can work with Salesforce from earlier versions of Microsoft[®] Outlook[®], like Microsoft Outlook 2010.

(1) Important: Starting in Winter '19, if you never set up Salesforce for Outlook or your reps aren't regularly working with it, service is no longer available. But don't fret: Our next-generation products, Lightning for Outlook and Lightning Sync, are better than ever and ready to serve you. Check out the Outlook Integration Trail for product details and setup instructions.

EDITIONS

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

Available in: All Editions

Download the Salesforce for Outlook Installer

Download the installer from Salesforce.

Install and Set Up Salesforce for Outlook

Manage Your Salesforce for Outlook Configuration

Depending on whether your administrator lets you change your settings, customize Salesforce for Outlook to fit your specific needs.

Uninstall Salesforce for Outlook

Download the Salesforce for Outlook Installer

Download the installer from Salesforce.

- 1. Close Microsoft[®] Outlook[®].
- 2. If you're downloading Salesforce for Outlook for the first time, continue to the next step. If you're upgrading, first close Salesforce for Outlook by right-clicking the Salesforce for Outlook icon (3) in your system tray, and clicking Exit. Then, follow the steps based on the version that you're upgrading from:
 - **a.** To upgrade from Salesforce for Outlook v2.4.2 or earlier, uninstall your current version from the Microsoft Windows® Control Panel.
 - **b.** To upgrade from Salesforce for Outlook v2.5.0. or later, continue to the next step.
- **3.** From your personal settings, enter *Salesforce for Outlook* in the Quick Find box. then select **Salesforce for Outlook**.
- **4.** Click **Download**. Then click **Save File**. If the **Download** button is unavailable, ask your administrator to assign you to an Outlook configuration.



EDITIONS

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

Available in: **All** Editions

USER PERMISSIONS

To sync using Salesforce for Outlook:

 Valid data set for each object being synced

To change sync folders:

 Your Outlook profile set as the default in your Outlook Mail Settings AND

> Allow users to modify Outlook folder for syncing contacts in your Outlook configuration

If you're an administrator, deploy installations to multiple users simultaneously using the .msi version of the installer.

SEE ALSO:

Getting Microsoft® Outlook® and Salesforce in Sync Salesforce for Outlook Salesforce for Outlook System Requirements Install and Set Up Salesforce for Outlook Personalize Your Salesforce Experience

Install and Set Up Salesforce for Outlook

- [] Important: Starting in Winter '19, if you never set up Salesforce for Outlook or your reps aren't regularly working with it, service is no longer available. But don't fret: Our next-generation products, Lightning for Outlook and Lightning Sync, are better than ever and ready to serve you. Check out the Outlook Integration Trail for product details and setup instructions.
- **1.** Open the installation file you downloaded and saved, and complete the installation wizard.
 - Note: If you don't yet have .NET 4 installed, the installation wizard installs it for you. Keep in mind that the installation wizard prompts you to restart your machine after it installs .NET 4. After restarting, run the installation wizard again to complete the installation process.
- 2. Open Microsoft® Outlook®. The setup wizard opens, and the Salesforce for Outlook icon (⑤) appears in your system tray. If the wizard doesn't open, you can start it manually. Right-click ⑥ and click Settings.
- **3.** If you want to log in to a site other than the default, click **Change URL** and pick the server to which you want to connect. If the server you want isn't listed, select *Other...* and enter the URL, such as a custom domain used by your organization.
- **4.** Enter your username and password.
- **5.** Click **Approve**. Doing so creates a secure connection between Outlook and Salesforce. You don't have to log in again unless you encounter an error.
 - Note: If your organization restricts IP addresses, logins from untrusted IPs are blocked until they're activated. Salesforce automatically sends you an activation email that you can use to log in. Doing so lets you connect without IP restrictions from anywhere.

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To sync using Salesforce for Outlook:

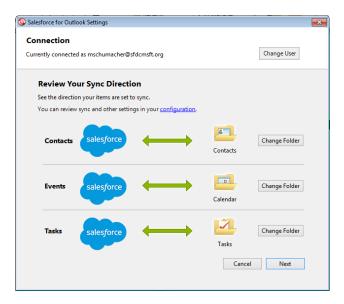
 Valid data set for each object being synced

To change sync folders:

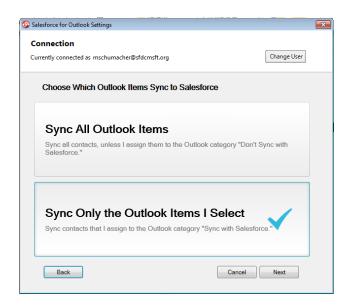
 Your Outlook profile set as the default in your Outlook Mail Settings AND

Allow users to modify Outlook folder for syncing contacts in your Outlook configuration

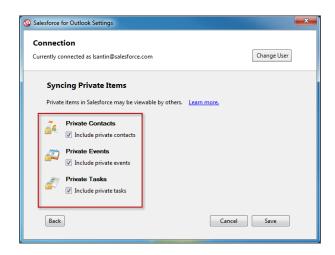
6. Click **Next**, and review the sync directions set up by your administrator. To sync your Outlook items to different folders, click **Change Folder** and select folders that are within your default folder or the main Mailbox folder.



- 7. Click **Next**, and then select your sync method.
 - Choose to sync all your contacts, events, and tasks. Mark items that you don't want to sync with the "Don't Sync with Salesforce" category in Outlook.
 - Choose to sync individual contacts, events, and tasks. Mark items that you want to sync with the "Sync with Salesforce" category in Outlook.



8. Click **Next**, and then select the kinds of private items you want to sync.



9. Click **Save**. A welcome message appears at the system tray icon (③), which is now active. If you're configured to sync Outlook items, and you chose Sync Only the Outlook Items I Select for your sync method, all items in the folders you chose start syncing automatically. The icon spins during every sync cycle.

SEE ALSO:

Salesforce for Outlook

Salesforce for Outlook System Requirements

Download the Salesforce for Outlook Installer

Uninstall Salesforce for Outlook

Manage Your Salesforce for Outlook Configuration

Depending on whether your administrator lets you change your settings, customize Salesforce for Outlook to fit your specific needs.

- From your personal settings in Salesforce, search for Salesforce for Outlook. Then click View My Configuration.
- 2. Depending on your permissions, you can:
 - Edit your email settings
 - Edit your sync settings
 - Edit your sync direction
 - Edit your conflict settings
 - View your matching criteria
 - Edit your field mappings
- **3.** Save your changes. All changes take effect the next time your data syncs. Return to your original settings any time by clicking **Revert to default** at the top of your modified configuration. Your administrator can change your settings as needed.

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To access your Salesforce for Outlook configuration

Assigned to an active configuration

Edit Your Salesforce for Outlook Email Settings

See whether your administrator lets you add emails to Salesforce from Microsoft® Outlook®, and change your email settings based on your needs.

Edit Your Salesforce for Outlook Sync Settings

Depending on whether your administrator gave you permissions, customize which items sync between Microsoft Outlook and Salesforce, and the directions they sync.

Customize Your Salesforce for Outlook Sync Direction

Depending on whether your administrator gave you permission, customize sync directions between Microsoft® Outlook® and Salesforce based on your preferences.

Edit Conflict Settings

Specify what happens when Salesforce for Outlook encounters a conflict as it syncs records between Microsoft® Outlook® and Salesforce.

Viewing Your Salesforce for Outlook Matching Criteria

See the matching criteria your administrator assigned to you.

Specify Which Salesforce Fields Sync to Microsoft® Outlook®

Depending on your Salesforce for Outlook permissions, map fields from the Salesforce records you sync to Outlook.

Edit Your Salesforce for Outlook Email Settings

See whether your administrator lets you add emails to Salesforce from Microsoft® Outlook®, and change your email settings based on your needs.

1. From your personal settings in Salesforce, search for Salesforce for Outlook. Then click **View** My Configuration.

If **Add Email** is selected, the **Add Email** and **Send and Add** options appear in Outlook.



2. Click Email to Salesforce Settings.

- 3. Enter your own email address in My Acceptable Email Addresses. If you send email from more than one address, separate each address with a comma.
- **4.** Choose whether all emails are sent to My Unresolved Items (so that you can manually assign them to related records) or to have Salesforce try to assign them first.
- **5.** Configure Email to Salesforce to add emails as activities to matching opportunities, leads, contacts, or all three. If you configure Email to Salesforce to associate emails to matching leads or contacts, Salesforce searches the **To** and **CC** fields for the email addresses of your leads or contacts. If any leads or contacts are found, Salesforce saves the email to the Activity History related list on the appropriate record.

To access your Salesforce for Outlook configuration:

Assigned to an active configuration

To edit email settings:

Add Email

- **6.** If you selected leads or contacts:
 - Specify how Email to Salesforce processes emails that contain lead or contact information that matches duplicate records.
 - Select If no matching records are found, create a task and send it to My Unresolved Items to have email sent to My Unresolved Items if no matching records are found. If this checkbox isn't selected, and Salesforce can't identify the email addresses in the To or From fields, the email isn't saved in Salesforce.
- 7. Select Always save email attachments to save attachments on emails sent to Salesforce.

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

8. To receive a confirmation email when an email is sent to Salesforce, select Email me confirmation of association.

9. Click Save.

SEE ALSO:

Manage Your Salesforce for Outlook Configuration Add Microsoft® Outlook® Emails to Salesforce Records Salesforce for Outlook

Edit Your Salesforce for Outlook Sync Settings

Depending on whether your administrator gave you permissions, customize which items sync between Microsoft Outlook and Salesforce, and the directions they sync.

- From your personal settings in Salesforce, search for Salesforce for Outlook. Then click View My Configuration.
- **2.** To see which kinds of records sync, hover over filter icons (γ).
- **3.** To stop an item from syncing, clear its checkbox. All fields related to that item are disabled on the page.
- **4.** Save your changes. All changes take effect the next time your data syncs. Return to your original settings any time by clicking **Revert to default** at the top of your modified configuration. Your administrator can change your settings as needed.

SEE ALSO:

Manage Your Salesforce for Outlook Configuration
Syncing Between Microsoft® Outlook® and Salesforce

Customize Your Salesforce for Outlook Sync Direction

Depending on whether your administrator gave you permission, customize sync directions between Microsoft® Outlook® and Salesforce based on your preferences.

- From your personal settings in Salesforce, search for Salesforce for Outlook. Then click View My Configuration.
- 2. Select one of these options under Sync Direction for a particular object.
 - Outlook to Salesforce—During its first sync, a record in Outlook creates or
 updates a record in Salesforce. During future syncs, changes made to Outlook records
 appear in Salesforce, regardless of whether the Salesforce version has changed. In addition,
 deleting a synced record in Outlook deletes its Salesforce counterpart. Salesforce changes
 are never sent to Outlook. The required conflict behavior setting for this option is Outlook
 always wins. This option isn't available for contacts.
 - Salesforce to Outlook—When data first syncs, a record in Salesforce creates or
 updates a record in Outlook. During future syncs, changes made to Salesforce records
 appear in Outlook, regardless of whether the Outlook version of the record has changed.
 In addition, deleting a synced record in Salesforce deletes its Outlook counterpart. Outlook
 changes are never sent to Salesforce. The required conflict behavior setting for this option
 is Salesforce always wins.

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To access your Salesforce for Outlook configuration

Assigned to an active configuration

To disable sync:

Whether object is synced

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To access your Salesforce for Outlook configuration

 Assigned to an active configuration

To change sync direction

Sync direction

• *Sync both ways*—When records sync, changes to Outlook and Salesforce sync between the two systems. If records conflict, the conflict behavior setting determines which record wins.

3. Save your changes. All changes take effect the next time your data syncs. Return to your original settings any time by clicking **Revert** to **default** at the top of your modified configuration. Your administrator can change your settings as needed.

SEE ALSO:

Manage Your Salesforce for Outlook Configuration

Edit Conflict Settings

Specify what happens when Salesforce for Outlook encounters a conflict as it syncs records between Microsoft® Outlook® and Salesforce.

- From your personal settings in Salesforce, search for Salesforce for Outlook. Then click View My Configuration.
- 2. Under Conflict Behavior for each object you're syncing, select one of these options.
 - Salesforce always wins
 - Outlook always wins
- **3.** Save your changes. All changes take effect the next time your data syncs. Return to your original settings any time by clicking **Revert to default** at the top of your modified configuration. Your administrator can change your settings as needed.

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To access your Salesforce for Outlook configuration

 Assigned to an active configuration

To change conflict behavior

Conflict behavior

Viewing Your Salesforce for Outlook Matching Criteria

See the matching criteria your administrator assigned to you.

If you have multiple Salesforce contacts that match a contact in Outlook, Salesforce for Outlook needs a way to determine which contact to sync. Your administrator sets criteria for the way Salesforce for Outlook chooses the correct contact.

Review the matching preference assigned to you. Available options include:

- Most recent activity—Choose the Salesforce contact that shows the most recent
 activity (such as a phone call or email), as shown in the contact's Activity History related list.
 This option is the default matching criteria.
- Last updated—Choose the Salesforce contact that was most recently modified.
- Oldest—Choose the Salesforce contact that has the earliest creation date.

SEE ALSO:

Manage Your Salesforce for Outlook Configuration

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To access your Salesforce for Outlook configuration

 Assigned to an active configuration

To view your configuration

 Assigned to a configuration

Specify Which Salesforce Fields Sync to Microsoft® Outlook®

Depending on your Salesforce for Outlook permissions, map fields from the Salesforce records you sync to Outlook.

Field mappings define which Salesforce and Outlook fields correspond when items sync between the two systems.

- From your personal settings in Salesforce, search for Salesforce for Outlook. Then click View My Configuration.
- 2. Under Data Settings, click **Edit Field Mappings** under Contacts, Events, or Tasks to display all the fields for records on that object.
- 3. Review which Salesforce fields are mapping to each Outlook field.
- **4.** Edit the Salesforce or Outlook field mappings you'd like to change, or create mappings for custom fields. Salesforce for Outlook lets you edit any field mapping with a picklist. You can add more mappings at the bottom of the list. You can remove mappings by clicking the X next to the mapping.
 - Warning: If you map a custom field that is universally required, make sure that it has a default value to avoid errors. Also, mapping custom fields that require validation by Salesforce can cause sync errors. For example, you map a custom Salesforce field that requires a unique value. If you enter a non-unique value in the Outlook field, you receive a sync error.

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To access your Salesforce for Outlook configuration

Assigned to an active configuration

To change field mappings

- Let users modify Field mappings in configuration
- **5.** Click **Save**. Field mappings begin syncing on items the next time those items are updated in either Salesforce or Outlook. Return to your original settings any time by clicking **Revert to default** at the top of your modified configuration. Your administrator can change your settings as needed.

SEE ALSO:

Manage Your Salesforce for Outlook Configuration

Uninstall Salesforce for Outlook

- 1. Close Outlook.
- 2. Right-click the sync icon (3) and select Exit.
- 3. Using your Windows Add or Remove Programs tool, remove Salesforce for Outlook.
- **4.** If you're reinstalling Salesforce for Outlook, remove the old Salesforce for Outlook database files in C:\Users\username\AppData\Roaming\salesforce.com\Salesforce for Outlook\DB\.

If you don't remove the old database files, Salesforce for Outlook continues to sync using your old settings.

EDITIONS

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

Available in: All Editions

Manage How Microsoft® Outlook® Items Sync with Salesforce

Manage your contacts, events, and tasks using Outlook categories to get your Outlook items to sync with Salesforce the way you want—by either selecting the items you'd like to sync, or syncing all your items, and selecting the items you'd like to prevent from syncing.

Important: Starting in Winter '19, if you never set up Salesforce for Outlook or your reps aren't regularly working with it, service is no longer available. But don't fret: Our next-generation products, Lightning for Outlook and Lightning Sync, are better than ever and ready to serve you. Check out the Outlook Integration Trail for product details and setup instructions.

View your sync settings from the Windows® system tray, and then manage how you'll sync your Outlook items with Salesforce.

1. Right click the Salesforce for Outlook icon () in the system tray.

△ 🚱 📭 🖫 🕪 🗎 4:23 PM

2. Click **Settings**, and then click **Next**.

- 3. See whether you're set up to sync items with the Sync Only the Outlook Items I Select option or the Sync All Outlook Items option.
 - If you're set up to sync with the Sync Only the Outlook Items I Select option, Salesforce for Outlook syncs
 only the Outlook items you choose. You'll assign the category Sync with Salesforce to the items you want to sync
 on page 184.
 - If you're set up to sync with the Sync All Outlook Items option, Salesforce for Outlook syncs all your Outlook items.
 You'll assign the category Don't Sync with Salesforce to the items you want to prevent from syncing on page 184.

4. Click Cancel.

Choose Which Microsoft® Outlook® Items Sync with Salesforce

If you're set up to sync your Outlook contacts, events, and tasks to Salesforce using the Sync Only the Outlook Items I Select option in Salesforce for Outlook, you'll need to select which Outlook items you want to sync.

Prevent Which Microsoft® Outlook® Items Sync with Salesforce

If you're set up to sync your Outlook contacts, events, and tasks to Salesforce using the Sync All Outlook Items option in Salesforce for Outlook, you can still control which items you don't want to sync.

Delete Items Syncing with Salesforce for Outlook

Remove an item syncing with Salesforce for Outlook from both Salesforce and Outlook by deleting the item in one system only. Take care to give special treatment to recurring tasks and recently-updated items you want to delete.

EDITIONS

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

Available in: All Editions

Choose Which Microsoft® Outlook® Items Sync with Salesforce

If you're set up to sync your Outlook contacts, events, and tasks to Salesforce using the Sync Only the Outlook Items I Select option in Salesforce for Outlook, you'll need to select which Outlook items you want to sync.

- 1. In Outlook, select the contacts, events, and tasks you want to sync.
- 2. On the Outlook ribbon, click Categorize.
- **3.** Select the category Sync with Salesforce.

 The items you categorized will start syncing during the next sync cycle.

EDITIONS

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

Available in: All Editions

Prevent Which Microsoft® Outlook® Items Sync with Salesforce

If you're set up to sync your Outlook contacts, events, and tasks to Salesforce using the Sync All Outlook Items option in Salesforce for Outlook, you can still control which items you don't want to sync.

- 1. In Outlook, select the contacts, events, and tasks you want to prevent from syncing.
- 2. On the Outlook ribbon, click Categorize.
- Select the category Don't Sync with Salesforce.The items you categorized will stop syncing after the next sync cycle.

EDITIONS

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

Available in: All Editions

Delete Items Syncing with Salesforce for Outlook

Remove an item syncing with Salesforce for Outlook from both Salesforce and Outlook by deleting the item in one system only. Take care to give special treatment to recurring tasks and recently-updated items you want to delete.

First, check the sync direction for the contact, event, or task you want to delete. Next, delete the item from the system in which the item is set to flow from. If your items are set to sync in both directions, you can delete items from either system.

As a result, Salesforce for Outlook automatically removes the corresponding item in the other system.

Ø

Note: Recurring tasks only sync from Salesforce, so there's no need to check the sync direction before deleting those items: always delete recurring tasks in Salesforce.

- 1. From your personal settings, enter *Salesforce for Outlook* in the Quick Find box, then click **View My Configuration**.
- **2.** Review the sync direction setting for the contact, event, or (non-recurring) task that you want to delete.
- 3. Delete the item in the system from which sync is flowing.
 For example, if you want to delete a contact, and your contacts are set to sync from Outlook to Salesforce, delete the contact in Outlook.
 The item you deleted is removed from both systems during the next sync cycle.

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To delete items syncing between Salesforce and Outlook

 Delete on all objects that users want to delete

If the item was not removed from both systems, you—or another sales rep—may have updated that record within the same sync cycle and Salesforce for Outlook gave preference to the update over the delete. This behavior happens as a result of <code>Conflict Behavior</code> set in someone's Salesforce for Outlook configuration, which would have let the update in one system "win" over the delete in the other. In this case, delete the record again to remove it from both systems. Or maybe check with your coworker first, who obviously cares about that item!

Access Salesforce for Outlook Settings and Tools

Important: Starting in Winter '19, if you never set up Salesforce for Outlook or your reps aren't regularly working with it, service is no longer available. But don't fret: Our next-generation products, Lightning for Outlook and Lightning Sync, are better than ever and ready to serve you. Check out the Outlook Integration Trail for product details and setup instructions.

After you install Salesforce for Outlook, an icon (**()** appears in your Microsoft Windows system tray.

EDITIONS

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

Available in: All Editions



From the system tray icon, you can:

- Sync Outlook and Salesforce items
- View your sync log
- Resolve your unresolved synced items
- Manage your Salesforce for Outlook configuration
- Manage which Outlook items sync with Salesforce on page 183
- Change your login information
- Hide alerts
- View errors
- Change your sync folders
- Access the Salesforce for Outlook online help

Accessing the System Tray Application

- If you don't see the icon, just restart the application by double-clicking the Salesforce for Outlook shortcut on your desktop or the application in your computer's Programs directory (**Start** > **All Programs** > **salesforce.com** > **Salesforce for Outlook**).
- If the icon is disabled (), you may need to start Outlook.
- If you don't see the icon, you might need to click the arrow next to the system tray and drag the Salesforce for Outlook icon to the system tray.

Viewing the Salesforce for Outlook Sync Log

Changing Your Salesforce for Outlook Login Information

Change Your Salesforce for Outlook Sync Folders

If you want to sync contacts, events, and tasks between Microsoft® Outlook® and Salesforce, you can set up Salesforce for Outlook to sync items in the Outlook folders of your choice.

Hide Salesforce for Outlook Alerts

If you'd rather not see system tray alerts for sync and other errors, you can hide them.

View Salesforce for Outlook Errors

Remove Customer Data from Your Salesforce for Outlook Logs

If you're required to delete customer data from Salesforce, in addition to removing records, you're required to delete the Salesforce for Outlook logs saved to your computer.

Viewing the Salesforce for Outlook Sync Log

The sync log records troubleshooting information for Salesforce for Outlook, including the number of records that had errors and the number of records that were created, updated, or deleted during sync.

To view this log, right-click the system tray icon (3) and click **Sync** > **View Sync Log**.

SEE ALSO:

Access Salesforce for Outlook Settings and Tools

Changing Your Salesforce for Outlook Login Information

If your Salesforce username or password changes, you'll need to update your login information in Salesforce for Outlook.

- 1. Right-click the system tray icon (((a)) on your desktop and select **Settings...**
- 2. Click Change User.
- **3.** Enter your correct Salesforce username and password, and click **Login**. Doing so creates a secure connection between Outlook and Salesforce. You don't have to log in again unless you encounter an error.
- **4.** Click **Allow** to give Salesforce for Outlook access to Salesforce.
- 5. Click **Next** and then click **Save**.

SEE ALSO:

Access Salesforce for Outlook Settings and Tools

EDITIONS

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

Available in: All Editions

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To log in to Salesforce for Outlook

 Assigned to an active configuration

Change Your Salesforce for Outlook Sync Folders

If you want to sync contacts, events, and tasks between Microsoft® Outlook® and Salesforce, you can set up Salesforce for Outlook to sync items in the Outlook folders of your choice.

- 1. Right-click the system tray icon (**(((a))**) on your desktop and select **Settings...**.
- 2. Click **Change Folder** and select or create a folder that's within your default folders or the main Mailbox folder.
- 3. Click Save.

SEE ALSO:

Access Salesforce for Outlook Settings and Tools

EDITIONS

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

Available in: All Editions

USER PERMISSIONS

To change sync folders:

Assigned to an active configuration

AND

Your Outlook profile set as the default in your Outlook Mail Settings

Hide Salesforce for Outlook Alerts

If you'd rather not see system tray alerts for sync and other errors, you can hide them. Right-click the system tray icon (③) and click **Hide Alerts**.

SEE ALSO:

Access Salesforce for Outlook Settings and Tools

EDITIONS

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

Available in: All Editions

View Salesforce for Outlook Errors

Whenever Salesforce for Outlook has problems syncing your data, the system tray icon changes to an error icon (①), and the status text at the top of the system tray shortcut menu displays the number of errors.

To view these errors, double-click the system tray icon or click the text in the shortcut menu to open the Salesforce for Outlook Error dialog box. If an error relates to a specific Outlook record, you can click the record's link to edit that record in Outlook.

To refresh the list after you resolve errors, click **Try Again**. Salesforce for Outlook syncs your data and removes any errors that have been resolved.

EDITIONS

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

Available in: **All** Editions

SEE ALSO:

Access Salesforce for Outlook Settings and Tools

Remove Customer Data from Your Salesforce for Outlook Logs

If you're required to delete customer data from Salesforce, in addition to removing records, you're required to delete the Salesforce for Outlook logs saved to your computer.

Salesforce for Outlook logs store details about that product's activity. The logs help Salesforce Customer Support debug issues, if you have them. However, if you're required to delete customer data from Salesforce, you also have to delete the Salesforce for Outlook logs saved to your computer.



Note: If you delete your Salesforce for Outlook logs, activity from those logs is no longer available for debugging issues with Customer Support. But Salesforce for Outlook creates logs for new activity when it occurs. If you're running into issues, make sure that you address them before deleting your logs.

- 1. Close Outlook.
- 2. Right-click the sync icon (3) and select Exit.
- **3.** From C:\Users\username\AppData\Roaming\salesforce.com\Salesforce for Outlook\logs, delete the files Trace.log and Sync.log.

What's the Latest with Salesforce for Outlook?

Get access to Salesforce for Outlook release notes, videos, and guides to keep you informed about the most efficient ways to manage your Microsoft® Outlook® and Salesforce integration routine.

(1) Important: Starting in Winter '19, if you never set up Salesforce for Outlook or your reps aren't regularly working with it, service is no longer available. But don't fret: Our next-generation products, Lightning for Outlook and Lightning Sync, are better than ever and ready to serve you. Check out the Outlook Integration Trail for product details and setup instructions.

EDITIONS

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

Available in: All Editions







| If you want to | Check out | This includes details about |
|---|--|---|
| Learn about the latest features, updates, and bug fixes | What's new with Salesforce for Outlook? | The most recent and past releases. These release notes are really for administrators, but you'll find them useful, too. |
| See how to integrate Outlook and Salesforce | Getting Started with Salesforce for Outlook | How you'll integrate Outlook and Salesforce, and how you can download and install Salesforce for Outlook. |
| | Using the Salesforce Side Panel to Work with Records in Microsoft® Outlook® | Working with Salesforce records directly in Outlook. The Salesforce Side Panel, included with Salesforce for Outlook, makes it simple to: |
| | | View and work with contacts and leads related to your emails |

| If you want to | Check out | This includes details about | |
|---|---|---|--|
| | | Add Outlook emails and events to Salesforce records Send and add Outlook emails to Salesforce records at the same time | |
| | Learning about Sync Directions (Salesforce Classic) | The settings for sync directions your administrator defined for you, and whether you have permissions to change those settings. | |
| Quickly set up your system to sync between Outlook and Salesforce | Getting Microsoft® Outlook® and Salesforce in Sync | How the Outlook and Salesforce integration process works, and: System requirements Download and installation procedures Configuration preferences, so you can sync only the contacts, events, and tasks you want | |

Salesforce for Outlook FAQ

Take a look at some common questions that come up for Salesforce for Outlook.

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| Category | Questions |
|---|--|
| General Salesforce for Outlook Questions | What's the difference between private items in both Salesforce and Microsoft® Outlook®? |
| Installing Salesforce for Outlook | Does Salesforce for Outlook support terminal servers? Why is my Salesforce for Outlook installation failing on the prerequisites screen? |
| Configuring Salesforce for Outlook | Can I map custom fields I'm syncing with Salesforce for Outlook? Can I mass configure Salesforce for Outlook? Can I use filter logic in Salesforce for Outlook data sets? |
| Syncing with Salesforce for Outlook | Should I sync Outlook or use import wizards to upload my data into Salesforce? Can I sync person accounts by using Salesforce for Outlook? Can I add cases using Salesforce for Outlook? |

EDITIONS

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

Available in: All Editions

| Category | Questions Can I associate Outlook records to custom objects using Salesforce for Outlook? | |
|-----------------------------|--|--|
| | | |
| Managing Synced Records | Why does Salesforce for Outlook create duplicate records in Microsoft® Outlook®? | |
| | Why does Salesforce for Outlook create duplicate contacts in Salesforce and Microsoft® Outlook®? | |
| | Why does Salesforce for Outlook delete my Outlook records after I sync? | |
| Adding Emails to Salesforce | Which email integration product is right for my company? | |
| Records | Can I add emails to Salesforce records? | |
| | Why isn't Salesforce for Outlook adding emails to the right contact or lead in Salesforce? | |
| | Why can't I add emails to Salesforce? | |
| | When I add emails to Salesforce, how can I include email attachments? | |
| Syncing Contacts | How do I enable contacts for sync in Salesforce for Outlook? | |
| Protecting Your Data | How does Salesforce for Outlook protect emails? | |
| | Does Salesforce support single sign-on (SSO) for Salesforce for Outlook? | |
| | How secure is Salesforce for Outlook? | |
| | | |

What's the difference between private items in both Salesforce and Microsoft® Outlook®?

Does Salesforce for Outlook support terminal servers?

Why is my Salesforce for Outlook installation failing on the prerequisites screen?

Can I map custom fields I'm syncing with Salesforce for Outlook?

Can I mass configure Salesforce for Outlook?

Can I use filter logic in Salesforce for Outlook data sets?

Can I sync person accounts by using Salesforce for Outlook?

Can I add cases using Salesforce for Outlook?

Can I associate Outlook records to custom objects using Salesforce for Outlook?

Why does Salesforce for Outlook create duplicate records in Microsoft® Outlook®?

Why does Salesforce for Outlook create duplicate contacts in Salesforce and Microsoft® Outlook®?

Why does Salesforce for Outlook delete my Outlook records after I sync?

Why isn't Salesforce for Outlook adding emails to the right contact or lead in Salesforce?

Why can't I add emails to Salesforce?

When I add emails to Salesforce, how can I include email attachments?

How do I enable contacts for sync in Salesforce for Outlook?

How does Salesforce for Outlook protect emails?

Does Salesforce support single sign-on (SSO) for Salesforce for Outlook?

How secure is Salesforce for Outlook?

What's the difference between private items in both Salesforce and Microsoft® Outlook®?

Private items in Microsoft Outlook and Salesforce differ in unexpected ways. Before choosing to sync private events, consider how they're displayed to colleagues in each system.

| Item | Private in Outlook | Marked private in Salesforce |
|----------|--|---|
| Contacts | Your Exchange administrator can see your contacts. Other users cannot. | Other Salesforce users can see contacts that are associated with accounts. |
| | | Contacts that aren't associated with accounts are private and aren't visible to other Salesforce users except for Salesforce administrators who can view, edit, and report on contacts. |
| Events | Your Exchange administrator can see your events. Other users cannot. | Only blocks of time, and not event details are visible to other Salesforce users, except for Salesforce administrators who can view, edit, and report on events. |
| Tasks | Your Exchange administrator can see your tasks. Other users cannot. | Salesforce doesn't include any means for keeping tasks private. So other Salesforce users can see your tasks. |

SEE ALSO:

Salesforce for Outlook

Syncing Between Microsoft® Outlook® and Salesforce

Does Salesforce for Outlook support terminal servers?

No. Salesforce for Outlook does not support terminal servers, such as Citrix.

SEE ALSO:

Salesforce for Outlook

Why is my Salesforce for Outlook installation failing on the prerequisites screen?

Your system may not meet all system requirements for Salesforce for Outlook. Verify your system meets these requirements, then try installing Salesforce for Outlook again.

SEE ALSO:

Salesforce for Outlook

Install and Set Up Salesforce for Outlook

Salesforce for Outlook System Requirements

Can I map custom fields I'm syncing with Salesforce for Outlook?

(1) Important: Starting in Winter '19, if you never set up Salesforce for Outlook or your reps aren't regularly working with it, service is no longer available. But don't fret: Our next-generation products, Lightning for Outlook and Lightning Sync, are better than ever and ready to serve you. Check out the Outlook Integration Trail for product details and setup instructions.

Yes. You can map a Salesforce field to a custom Outlook field, or an Outlook field to a custom Salesforce field using Salesforce for Outlook. These field types are available to map:

- Outlook text fields
- Salesforce text fields
- Some Salesforce picklist fields

To map to custom fields, open an Outlook configuration. Under Field Mapping, select Custom Field... from the end of the corresponding Outlook Field picklist. Enter the field's name and click **OK**.

SEE ALSO:

Specify Which Salesforce Fields Sync to Microsoft® Outlook®

Can I mass configure Salesforce for Outlook?

[1] Important: Starting in Winter '19, if you never set up Salesforce for Outlook or your reps aren't regularly working with it, service is no longer available. But don't fret: Our next-generation products, Lightning for Outlook and Lightning Sync, are better than ever and ready to serve you. Check out the Outlook Integration Trail for product details and setup instructions.

Yes, you can create a configuration in Salesforce and assign it to profiles or even specific users. When those users set up Salesforce for Outlook, the configuration's settings are automatically deployed to Outlook.

SEE ALSO:

Manage Your Salesforce for Outlook Configuration

Can I use filter logic in Salesforce for Outlook data sets?

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Admins can use filter logic to limit which records your users sync using Salesforce for Outlook, but users can't.

SEE ALSO:

Syncing Between Microsoft® Outlook® and Salesforce

Can I sync person accounts by using Salesforce for Outlook?

(1) Important: Starting in Winter '19, if you never set up Salesforce for Outlook or your reps aren't regularly working with it, service is no longer available. But don't fret: Our next-generation products, Lightning for Outlook and Lightning Sync, are better than ever and ready to serve you. Check out the Outlook Integration Trail for product details and setup instructions.

No. You can't upload person accounts by using Salesforce for Outlook.

For information on how to import person accounts into your Salesforce organization, see Data Import Wizard.

SEE ALSO:

Syncing Between Microsoft® Outlook® and Salesforce

Can I add cases using Salesforce for Outlook?

(1) Important: Starting in Winter '19, if you never set up Salesforce for Outlook or your reps aren't regularly working with it, service is no longer available. But don't fret: Our next-generation products, Lightning for Outlook and Lightning Sync, are better than ever and ready to serve you. Check out the Outlook Integration Trail for product details and setup instructions.

Yes, Salesforce for Outlook supports adding emails to Salesforce as cases.

SEE ALSO:

Create Cases from the Outlook Ribbon with Salesforce for Outlook Set Up Create Case for Salesforce for Outlook Users

Can I associate Outlook records to custom objects using Salesforce for Outlook?

(1) Important: Starting in Winter '19, if you never set up Salesforce for Outlook or your reps aren't regularly working with it, service is no longer available. But don't fret: Our next-generation products, Lightning for Outlook and Lightning Sync, are better than ever and ready to serve you. Check out the Outlook Integration Trail for product details and setup instructions.

You can assign synced events and tasks to several different objects, including custom objects, but you can assign synced contacts only to accounts.

SEE ALSO:

Syncing Between Microsoft® Outlook® and Salesforce

Why does Salesforce for Outlook create duplicate records in Microsoft® Outlook®?

(1) Important: Starting in Winter '19, if you never set up Salesforce for Outlook or your reps aren't regularly working with it, service is no longer available. But don't fret: Our next-generation products, Lightning for Outlook and Lightning Sync, are better than ever and ready to serve you. Check out the Outlook Integration Trail for product details and setup instructions.

If you either mark items as Private or assign them to the Outlook category *Don't Sync with Salesforce*, and you sync contacts, events, and tasks from Salesforce to Outlook, Salesforce for Outlook may create duplicate records in Outlook.

This can happen if you have Salesforce items that contain the same information as the Outlook items you either marked as Private or assigned to the category *Don't Sync with Salesforce*. These items were never mapped to each other, so Salesforce for Outlook treats them separately, resulting in duplicates.

If you want to remove duplicates, it's best to remove the ones in Outlook that you either marked as Private or assigned to the Outlook category *Don't Sync with Salesforce*. Doing this ensures that you don't delete information in Salesforce to which other users may have contributed.

SEE ALSO:

Syncing Between Microsoft® Outlook® and Salesforce

Why does Salesforce for Outlook create duplicate contacts in Salesforce and Microsoft® Outlook®?

(1) Important: Starting in Winter '19, if you never set up Salesforce for Outlook or your reps aren't regularly working with it, service is no longer available. But don't fret: Our next-generation products, Lightning for Outlook and Lightning Sync, are better than ever and ready to serve you. Check out the Outlook Integration Trail for product details and setup instructions.

If you sync your team's records and they include different information for some of the same contacts you own, Salesforce for Outlook may create duplicate contacts in both Salesforce and Outlook.

For example, you and a team member both have a contact for Christina Wills. But the two contacts list different companies for her. Salesforce for Outlook syncs the contacts for you and your team members, resulting in duplicates in Salesforce and Outlook.

To avoid this, coordinate with your team members so you share the same contact information. You'll need to remove the contacts containing the outdated information.

SEE ALSO:

Syncing Between Microsoft® Outlook® and Salesforce

Why does Salesforce for Outlook delete my Outlook records after I sync?

Salesforce for Outlook automatically syncs records you own, as well as records to which you have read/write access that are:

- Associated with accounts you own
- Associated with accounts of which you are an account team member
- Owned by members of your sync profile's groups

If you try to sync a record from Outlook to Salesforce that doesn't fit in the above categories, the sync process may attempt to delete that record from Outlook during a later sync. To avoid deletion of these records, assign them to the Outlook category *Don't Sync with Salesforce*.

SEE ALSO:

Syncing Between Microsoft® Outlook® and Salesforce

Why isn't Salesforce for Outlook adding emails to the right contact or lead in Salesforce?

One of the following may be occurring.

| If you see | Salesforce for Outlook may be adding your emails to | You should |
|---|---|--|
| Duplicate records in Salesforce Side Panel | The wrong records | Consider merging the duplicate records |
| No matching record in Salesforce side panel | My Unresolved Items | Add the matching contacts or leads to Salesforce and associate the unresolved emails with your new contacts or leads |

| If you see | Salesforce for Outlook may be adding your emails to | You should |
|------------|---|--|
| | | Remove your company's domain from Excluded Domains in your My Email to Salesforce settings |

SEE ALSO:

Edit Your Salesforce for Outlook Email Settings

Why can't I add emails to Salesforce?

If you receive the error message User is not authorized to send emails to this service when you use Salesforce for Outlook to add emails, your email address isn't authorized in Salesforce.

To authorize email addresses in Salesforce:

- 1. From your personal settings, enter My Email to Salesforce in the Quick Find box, then select My Email to Salesforce.
- 2. In My Acceptable Email Addresses, enter the email addresses you want to authorize. Salesforce allows you to add emails through Salesforce for Outlook from only the addresses listed in this field. You cannot leave this field empty.

SEE ALSO:

Edit Your Salesforce for Outlook Email Settings Personalize Your Salesforce Experience

When I add emails to Salesforce, how can I include email attachments?

(1) Important: Starting in Winter '19, if you never set up Salesforce for Outlook or your reps aren't regularly working with it, service is no longer available. But don't fret: Our next-generation products, Lightning for Outlook and Lightning Sync, are better than ever and ready to serve you. Check out the Outlook Integration Trail for product details and setup instructions.

If you meet these requirements, you can include email attachments when you add emails to Salesforce.

- You and your administrator enable the correct settings.
- Salesforce has enough space to store the attachment.
- The attachment file size doesn't exceed Salesforce general email limits.

When you add an email to Salesforce, the email is added as a new task. When you add email attachments using Salesforce for Outlook or Email to Salesforce, attachments are included on the Attachments related lists. When you add attachments using Lightning for Outlook, attachments are added to your Salesforce Files.

Depending on how your administrator configured your settings, you can add email attachments to Salesforce in one of several ways.

| If you're using | You enable | Your administrator enables | Add attachments to Salesforce like this |
|-----------------------|--|--|--|
| Lightning for Outlook | Lightning for Outlook in supported versions of Microsoft® Outlook, by selecting Manage add-ins. If Lightning for | Lightning for Outlook in Salesforce Setup | After you add the email to Salesforce from Lightning for Outlook, select the option to include attachments. |

| If you're using | You enable | Your administrator enables | Add attachments to Salesforce like this |
|---|--|--|--|
| | Outlook isn't available, add it from the Microsoft® Office Store. | | |
| Salesforce for Outlook with side panel | | Side Panel and Add Email in your Outlook configuration | Automatically, after you add an email to Salesforce from the side panel. |
| | | Side Panel, Add Email, and Allow users to select attachments in your Outlook configuration | When you select after you add an email to Salesforce from the side panel. |
| Salesforce for Outlook without side panel | Email to Salesforce in your Email settings, with Always save email attachments selected | Email to Salesforce in Salesforce Setup and an active Outlook configuration that includes you | Automatically, after you add an email to Salesforce using the Add Emails or Send and Add buttons in Outlook. |
| Email to Salesforce | Email to Salesforce in your Email settings, with Always save email attachments selected | Email to Salesforce in Salesforce Setup | Automatically, after you send the email to your Email to Salesforce address. |

SEE ALSO:

Email and Email Template Allocations per Edition
Add Microsoft® Outlook® Emails to Salesforce Records
Set Up Email Options for Salesforce for Outlook
Set Up Email to Salesforce
Enable Email to Salesforce for Your Users

How do I enable contacts for sync in Salesforce for Outlook?

Your administrator needs to perform the following two tasks before you can sync contacts between Microsoft® Outlook® and Salesforce.

- Your administrator creates a configuration that allows users to sync contacts.
- Your administrator defines a data set for that configuration.

After your administrator performs those tasks, you may have permissions to enable contacts for sync by completing the following procedure.

- 1. From your personal settings, enter Salesforce for Outlook in the Quick Find box, then select Salesforce for Outlook.
- 2. Click View My Configuration.

3. Under the Sync Settings section, verify you have **Contacts** selected. If you're unable to select it, contact your administrator, who can enable contact syncing for you.

SEE ALSO:

Edit Your Salesforce for Outlook Sync Settings How Your Contacts Sync with Salesforce for Outlook Learning about Data Sets for Salesforce for Outlook Personalize Your Salesforce Experience

How does Salesforce for Outlook protect emails?

Salesforce supports both delegated authentication and Security Assertion Markup Language (SAML) requirements for Salesforce for Outlook. When using SAML for Salesforce for Outlook, My Domain is required.

SEE ALSO:

Edit Your Salesforce for Outlook Email Settings

Does Salesforce support single sign-on (SSO) for Salesforce for Outlook?

Yes. Salesforce supports both delegated authentication and Security Assertion Markup Language (SAML) requirements for Salesforce for Outlook. When using delegated authentication, users need to log into Salesforce the first time they use Salesforce for Outlook. When using SAML for Salesforce for Outlook, My Domain is required.

How secure is Salesforce for Outlook?

Salesforce for Outlook, a .NET application you install on your machine, securely connects to Salesforce. Specifically,

| For | Salesforce for Outlook uses |
|---------------------------|--|
| Usernames and passwords | OAuth 2.0 to authenticate with Salesforce. We store usernames and encrypted OAuth refresh tokens locally. We never store passwords. |
| Connections to Salesforce | SSL 128-bit encryption through an HTTPS connection. |

Mail Merge

A mail merge is the process of generating form letters and other Microsoft® Word documents that are personalized for the recipient, who is often a contact or lead. The content of each document is predefined in a mail merge template. Mail merge templates include variables called merge fields where data from your Salesforce records—for example a contact's name and address—displays in the generated document.



Important: Salesforce ended support for Standard Mail Merge and Connect for Office on March 4, 2017. This change means that Salesforce no longer provides support or maintenance when there is an issue with those products. To let sales reps continue running mail merges with Salesforce data, migrate your sales reps to Extended Mail Merge.

EDITIONS

This feature is available in Salesforce Classic

Available in: All Editions

- Note: Standard mail merge requires:
- Microsoft[®] Internet Explorer[®] versions 9, 10, and 11
- Microsoft® Excel 2007 to use the Excel add-in. (The Word add-in is not supported for Microsoft Word 2007.)
- Microsoft Windows Vista® (32-bit only) Until Salesforce disables TLS 1.0.

Generating Single Mail Merge Documents

To generate a Microsoft Word document for an individual record, open the record's detail page and click **Mail Merge** on the Activity History related list.

Generating Mass Mail Merge Documents

To generate Microsoft Word documents for multiple records, such as when sending a mass mailing, see the Salesforce Bulk Mail Merge Process document.

Alternatively, if Extended Mail Merge has been enabled for your organization you can easily generate mail merge documents—such as form letters with matching envelopes and address labels—for multiple records at the same time.

Managing Mail Merge Templates

Send a Single Mail Merge Document

Create mail merge documents using fields supported objects.

Generate Mass Mail Merge Documents with Extended Mail Merge

SEE ALSO:

Installing the Mail Merge ActiveX Control

Generate Mass Mail Merge Documents with Extended Mail Merge

Send a Single Mail Merge Document

Managing Mail Merge Templates

Mail merge templates define the content of a form letter or other mail merge document. They include variables called merge fields where data from your records—for example a contact's name and address—displays in the generated document.

As an administrator, you're responsible for building mail merge templates in Microsoft Word and uploading them to Salesforce to make them available for your users. To get started, see the following topics or Download sample mail merge templates.

Considerations for Using Merge Fields in Mail Merge Templates

When you use merge fields in mail merge templates, you can incorporate data from your records into the mail merge templates you create in Microsoft Word. It's a good idea to understand how merge fields work so that you know what to expect in your merged documents.

Create Mail Merge Templates in Salesforce Classic

Modify Existing Mail Merge Templates in Salesforce Classic

EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: All Editions

USER PERMISSIONS

To upload and edit mail merge templates:

 Manage Public Templates

Create Mail Merge Templates with Microsoft® Word

The Connect for Office Word add-in provides a complete list of valid merge fields for you to insert. When Salesforce disables TLS 1.0, we're ending support for Connect for Office.

Uploading Mail Merge Templates to Salesforce

SEE ALSO:

Mail Merge

Considerations for Using Merge Fields in Mail Merge Templates

Send a Single Mail Merge Document

Considerations for Using Merge Fields in Mail Merge Templates

When you use merge fields in mail merge templates, you can incorporate data from your records into the mail merge templates you create in Microsoft Word. It's a good idea to understand how merge fields work so that you know what to expect in your merged documents.

EDITIONS

This feature is available in Salesforce Classic

Available in: All Editions

Guidelines for Syntax and Formatting

Mail merge templates are created by uploading documents to Salesforce from your desktop. The syntax for these merge fields is <code>OBJECT_FIELD_NAME</code> or <code>FIELD_NAME</code>. Merge fields for mail merge templates must:

- Be unique
- Contain only letters, numbers, and the underscore () character
- Not exceed 40 characters

For example: AccountNumber. To make sure that you're using the correct syntax, use Connect for Office to insert merge fields into your mail merge template.

Merge Field Compatibility

- You can use custom Contact or Lead fields for merging, but only for documents generated from that field's object. For example, a custom Lead field can only be used for templates for leads.
- Merge fields for products on opportunities are only available to organizations that have enabled products.
- Approval Process merge fields can be used in email templates, but not mail merge templates.
- Campaign and campaign member merge fields cannot be used in mail merge templates.

Create Mail Merge Templates in Salesforce Classic

- 1. Open a new blank document in Microsoft® Word 2007.
- **2.** Use Word to compose the document so it contains the text, data, and formatting your users require.
- **3.** Locate the text or data variables in your Word document that will change each time the template is used. For example, in the salutation "Dear Bob," "Bob" is a variable because it will change when the letter is sent to a different person.
- **4.** Replace each variable with the appropriate Salesforce merge field.
 - Important: Each mail merge field label you use must be unique.
 - **a.** Place your cursor where you want to insert a merge field.
 - **b.** In Word 2007, select the Insert tab on the Ribbon, click **Quick Parts** in the Text group, and then click **Field**.
 - c. Select Mail Merge in the Categories drop-down list.
 - **d.** Select **MergeField** in the Field names box.
 - e. In the Field Properties area of the Field name box, manually enter the valid merge field, such as Opportunity_LineItem_ProductName. To create a complete list of the standard and custom fields available in your Salesforce organization, visit the Locate Record Field Names for Mail Merge article.
 - f. Click OK.
 - Note: To list information about all products associated with an opportunity, insert the Opportunity_LineItem_Start merge field where you want to begin listing product information. Then, insert all the merge fields you want to include for each product on an opportunity. Finally, insert the Opportunity LineItem End to end the list.
- **5.** Save your Word document.
- **6.** Proceed to Uploading Mail Merge Templates to Salesforce on page 203.
- **1** Tip: For best results:
 - Do not configure mail merge templates as "protected" or "restricted access" in Microsoft Word. Please refer to Word's help for information about protected Word documents. (In Word, press F1 to open help.)
 - Do not connect mail merge templates to external data sources such as Excel worksheets or Access databases. Please refer to Word's help for information about restoring mail merge documents to what Word calls "normal Word documents."
 - For details on how to set up your template with these tips in mind, refer to Guidelines for Uploading Mail Merge Templates.

SEE ALSO:

Managing Mail Merge Templates Mail Merge

EDITIONS

This feature is available in Salesforce Classic

Available in: All Editions

USER PERMISSIONS

To upload and edit mail merge templates:

 Manage Public Templates

Modify Existing Mail Merge Templates in Salesforce Classic

- 1. Download the sample mail merge templates and unzip the files to a convenient directory on your hard drive.
- Review the instructions provided in salesforce mailmerge templates howto.doc.
- 3. Open the desired sample template in Microsoft Word.
- **4.** Save a copy of the sample template to your computer's desktop or other convenient location. In Word 2007, select **Save As** from the Office button then choose an appropriate file name and destination folder.
- 5. Optionally, customize the text and formatting of the template.
- **6.** Press ALT+F9 to display the hidden mail merge field codes.

Each of the mail merge fields should now appear in curly braces as follows: {MERGEFIELD Contact FullName * MERGEFORMAT}

- **7.** Change or add merge fields as necessary.
 - **a.** Place your cursor where you want to insert a merge field.
 - b. In Word 2007, select the Insert tab on the Ribbon, click Quick Parts in the Text group, and then click Field.
 - c. Select Mail Merge in the Categories drop-down list.
 - **d.** Select **MergeField** in the Field names box.
 - e. In the Field Properties area of the Field name box, manually enter the valid merge field, such as Opportunity_LineItem_ProductName. To create a complete list of the standard and custom fields available in your Salesforce organization, visit the Locate Record Field Names for Mail Merge article.
 - f. Click OK.
 - Note: To list information about all products associated with an opportunity, insert the Opportunity_LineItem_Start merge field where you want to begin listing product information. Then, insert all the merge fields you want to include for each product on an opportunity. Finally, insert the Opportunity LineItem End to end the list.
- **8.** Save your Word document.
- **9.** Proceed to Uploading Mail Merge Templates to Salesforce on page 203.
- Tip: For best results:
 - Do not configure mail merge templates as "protected" or "restricted access" in Microsoft Word. Please refer to Word's help for information about protected Word documents. (In Word, press F1 to open help.)
 - Do not connect mail merge templates to external data sources such as Excel worksheets or Access databases. Please refer to Word's help for information about restoring mail merge documents to what Word calls "normal Word documents."

For details on how to set up your template with these tips in mind, refer to Guidelines for Uploading Mail Merge Templates.

SEE ALSO:

Managing Mail Merge Templates

Considerations for Using Merge Fields in Email Templates

Mail Merge

EDITIONS

This feature is available in Salesforce Classic

Available in: All Editions

USER PERMISSIONS

To upload and edit mail merge templates:

 Manage Public Templates

EDITIONS

orgs)

Available in: Salesforce

Available in: All Editions

Classic (not available in all

Create Mail Merge Templates with Microsoft® Word

The Connect for Office Word add-in provides a complete list of valid merge fields for you to insert. When Salesforce disables TLS 1.0, we're ending support for Connect for Office.

(1) Important: When Salesforce disables TLS 1.0, we're ending support for Connect for Office. This change means that there's no guarantee that Connect for Office can establish a connection between Salesforce and Microsoft® Word or Excel. Even if sales reps can establish a connection, Salesforce no longer provides support or maintenance when there's an issue.

Important: Each mail merge field label you use must be unique.

1. Open Microsoft Word.

If you use You'll Word 2003 or earlier Select Log In from the Salesforce drop-down menu on the toolbar. Word 2007 Open the Salesforce tab on the Ribbon, click the Merge Fields drop-drown menu, and then select Log In.

- 3. Enter your Salesforce username and password.
- 4. Click Login.

2.

- Note: When you are successfully logged in and have an active session, the **Log In** command in the drop-down button is disabled. To log out, click **Log Out**.
- **5.** Create your mail merge template from an existing or blank Word document.
- **6.** Place your cursor where you want to insert a Salesforce merge field. To replace an existing merge field, select the entire merge field in your template. Mail merge fields must be unique.
- 7. In Word 2003 and earlier, select **Insert Merge Field** from the **Salesforce** drop-down menu. In Word 2007, click the **Merge Fields** drop-drown menu at the Salesforce tab on the Ribbon, and then select **Insert Merge Field**.
- **8.** In the Insert Merge Fields dialog, select a field type and then select the merge field you want to insert. If you use products in Salesforce, see Including Opportunity Product Data in Mail Merge Templates on page 202.
- 9. Click **Insert** to add the merge field at your current cursor position in your Word document.
- 10. Insert additional merge fields as desired to build your mail merge template.
- 11. After your mail merge template is complete, upload it to Salesforce from Setup by entering *Mail Merge Templates* in the Quick Find box, then selecting **Mail Merge Templates**.

Including Opportunity Product Data in Mail Merge Templates

Products are available in Professional, Enterprise, Unlimited, Performance, and Developer Editions. To add opportunity product data to your mail merge template, in the Insert Merge Fields dialog select Opportunity Line Item Fields and then select the fields to insert. This inserts a table with the selected merge fields and special "start" and "end" fields. (You can download sample default mail merge templates which include a table of opportunity product data.) You can modify this table as needed, but the Opportunity_LineItem_Start merge field must be before all opportunity product merge fields and the Opportunity_LineItem_End merge field must be after all opportunity product merge fields. These start and end fields trigger Salesforce to list all of the products on the opportunity.

If you also want to insert product merge fields into the table of opportunity product merge fields, you can do so manually without using the Salesforce Word add-in:

- 1. In your Word document, place your cursor where you want to insert the merge field.
- 2. In Word 2003 and earlier, select **Insert** and then **Field** from the Word menu bar. In Word 2007, select the Insert tab on the Ribbon, click **Quick Parts** in the Text group, and then click **Field**.
- 3. Select Mail Merge in the Categories drop-down list.
- **4.** Select **MergeField** in the Field names box.
- 5. In the Field name box in the Field Properties area, enter the merge field name manually, such as Opportunity LineItem ProductName.
- 6. Click OK.

SEE ALSO:

Install Connect for Office

Uploading Mail Merge Templates to Salesforce

Administrators and users with the "Manage Public Templates" permission must upload completed Microsoft Word mail merge templates to Salesforce to make them available for use.

- Tip: Before uploading a template, we recommend reviewing Guidelines for Uploading Mail Merge Templates.
- 1. In Salesforce, from Setup, enter *Mail Merge Templates* in the Quick Find box, then select **Mail Merge Templates**.
- 2. Click New Template.
- **3.** Enter a name and description for the template. This will help users correctly choose a template when generating mail merge documents.

If your organization uses Extended Mail Merge, choose the appropriate document type: Document, Label, or Envelope.

- **4.** Click **Browse** to select your Word mail merge template.
- 5. Click Save to finish.

SEE ALSO:

Managing Mail Merge Templates Generate Emails From Records Mail Merge

Send a Single Mail Merge Document

Create mail merge documents using fields supported objects.

- (1) Important: Salesforce ended support for Standard Mail Merge and Connect for Office on March 4, 2017. This change means that Salesforce no longer provides support or maintenance when there is an issue with those products. To let sales reps continue running mail merges with Salesforce data, migrate your sales reps to Extended Mail Merge.
- 1. Click **Mail Merge** in the Activity History related list on the appropriate record. Accounts, contacts, leads, cases, opportunities, and custom objects are supported.

EDITIONS

This feature is available in Salesforce Classic

Available in: All Editions

USER PERMISSIONS

To upload and edit mail merge templates:

 Manage Public Templates

EDITIONS

This feature is available in Salesforce Classic

Available in: All Editions

- **2.** Use the lookup to specify the record from which information will be merged.
- 3. Select a mail merge template.
- 4. Click Generate.

If the custom object has a master-detail relationship with opportunities, the primary contact for the opportunity is selected by default.

- **5.** Salesforce then generates your document:
 - If your organization uses standard mail merge, Word opens with your generated document. When the document displays, choose **Save As** from the **File** menu to save the document to your hard drive.
 - If your organization uses Extended Mail Merge and your request exceeds the maximum size limit, you are prompted to select a smaller mail merge template. With Extended Mail Merge, Word does not open when you click **Generate**. Instead, Salesforce sends you an email that either includes your generated Word document as an attachment or provides a link to it on the Documents tab.
- 6. If you chose to log an activity for the mail merge, enter the task information, and optionally create a follow-up task.
 - The Subject of the mail merge task is set to the mail merge template name by default, and the task is displayed as a completed activity in the Activity History related list. The merged document is not stored with the task.
 - You can log an activity for mail merge if you have access to view or edit the record you are merging and are able to create tasks (that is, you have the "Edit Task" permission).
- 7. Print and mail your document or send it as an email attachment.

Mail Merge Considerations

Extended Mail Merge supports the following additional environments: the Mozilla Firefox Web browser and the Apple Mac OS. Furthermore, it doesn't require the installation of an ActiveX control.

Extended Mail Merge supports Microsoft Word 2007.

- Extended Mail Merge does not support templates saved in .dotx file formats.
- Mail merge documents give you access only to the fields that are accessible to you via your page layout and field-level security settings.
- Extended mail merge doesn't support formatting from rich text area fields.
- Using mail merge from a record detail page automatically triggers standard workflow and validation rules for that record. Using Extended Mail Merge, however, doesn't trigger those rules.
- With Extended Mail Merge, a mail merge operation can't exceed the following limits:
 - 1,000 records
 - The selected mail merge template(s) total size can't be larger than 1 MB.
 - For mass mail merges, the number of selected records multiplied by the combined sizes of the selected mail merge templates can't be larger than 50 MB.
- When you preview a mail merge document, you see only the template. The preview doesn't populate merge fields with your data because there's no record detail available to the preview template.

SEE ALSO:

Mail Merge

Generate Mass Mail Merge Documents with Extended Mail Merge

Generate Mass Mail Merge Documents with Extended Mail Merge



Note: You can generate mail merge documents using the Extended Mail Merge feature. Extended Mail Merge is available by request only. Contact Salesforce Customer Support if you are interested in this feature.

In addition, your administrator must activate the feature before you can use Extended Mail Merge.

EDITIONS

This feature is available in Salesforce Classic

Available in: All Editions

With Extended Mail Merge, you can easily generate mail merge Microsoft® Word documents—such as form letters with matching envelopes and address labels—for multiple records at the same time.

- 1. Click the accounts, contacts, or leads tab. Other kinds of records are not currently supported.
- 2. In the Tools area, click Mass Mail Merge to start the mass mail merge wizard.
- 3. Choose an appropriate list view from the View drop-down list.
- **4.** Select the records to include in the mail merge. To select all records currently displayed on the page, select the checkbox in the column header.
- 5. Click Next.
- 6. Select the types of Word documents you'd like to generate. The supported document types are documents, envelopes, and labels.
- 7. Select the Log an activity... checkbox to log the generation of these mail merge documents by adding a completed task on each record.
- 8. Click Next.
- **9.** Select the appropriate mail merge templates.

For documents, choose whether to create one Word document that includes all output or a separate Word document for each record.

10. Optionally, click **Preview Template** to review the Word document with merge fields but without your data. Note that although you can edit the Word document that opens, those changes won't be applied to your current mail merge request. To make a newly revised template available for mail merge, it must be uploaded first.

11. Click Finish.



Note: If your request exceeds the maximum size limit for Extended Mail Merge, you're prompted to select either fewer records or smaller templates.

Salesforce sends you an email when your generated documents are ready. When mail merge documents are:

- Under 3 MB, Salesforce sends them to your email as either Word document (.doc) or Zip file (.zip). attachments. If the attachment size exceeds your organization's maximum email attachment size, or your administrator has set all mail merge documents to be saved to the Documents tab, Salesforce automatically saves your generated documents to the Documents tab. You'll receive an email with a link to the document's location.
- Over 3 MB, Salesforce saves them to your personal documents folder on the Documents tab.

Mail Merge Considerations

Extended Mail Merge supports the following additional environments: the Mozilla Firefox Web browser and the Apple Mac OS. Furthermore, it doesn't require the installation of an ActiveX control.

Extended Mail Merge supports Microsoft Word 2007.

• Extended Mail Merge does not support templates saved in .dotx file formats.

Sales Productivity Einstein Activity Capture

• Mail merge documents give you access only to the fields that are accessible to you via your page layout and field-level security settings.

- Extended mail merge doesn't support formatting from rich text area fields.
- Using mail merge from a record detail page automatically triggers standard workflow and validation rules for that record. Using Extended Mail Merge, however, doesn't trigger those rules.
- With Extended Mail Merge, a mail merge operation can't exceed the following limits:
 - 1,000 records
 - The selected mail merge template(s) total size can't be larger than 1 MB.
 - For mass mail merges, the number of selected records multiplied by the combined sizes of the selected mail merge templates can't be larger than 50 MB.
- When you preview a mail merge document, you see only the template. The preview doesn't populate merge fields with your data because there's no record detail available to the preview template.

SEE ALSO:

Mail Merge

Send a Single Mail Merge Document

Einstein Activity Capture

Say goodbye to logging. Say hello to smarter selling. Connect your email and calendar to Salesforce. Then, your emails and events are automatically associated with related account, contact, contract, lead, opportunity, and quote records in Salesforce. Plus, emails sent from Salesforce go through your email account.

What Is Einstein Activity Capture Standard?

Einstein Activity Capture is available through the Standard Einstein Activity Capture permission set, which is for users who don't have a Sales Cloud Einstein or Inbox license. Einstein Activity Capture has a few differences depending on which version you use.

Set Up Einstein Activity Capture

Get your sales reps up and running with Einstein Activity Capture. Configure settings, such as controlling which activities are added to Salesforce records and how they're shared. Then, select who can use the feature, and turn it on. Plus, give reps access to the Activities dashboard so they can see a summary of sales activities, including those added with Einstein Activity Capture. The basic setup steps are the same for Einstein Activity Capture Standard and the licensed versions.

Use Einstein Activity Capture

After your Salesforce admin has enabled Einstein Activity Capture, connect your email and calendar to Salesforce. Then, your emails and events are automatically associated with related Salesforce records. You can also control which activities are shared and how. Plus, review the

Activities dashboard to see a summary of sales activities, including the ones added with Einstein Activity Capture.

EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

Available with Sales Cloud Einstein, which is available for an extra cost in: **Enterprise**, **Performance**,

and **Unlimited** Editions

Available with Inbox, which is available for an extra cost in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

Things to Know About Einstein Activity Capture

If you use Einstein Activity Capture, review considerations for setting up the feature and guidelines for using it.

SEE ALSO:

Sales Cloud Einstein

Inbox

What Is Einstein Activity Capture Standard?

Einstein Activity Capture is available through the Standard Einstein Activity Capture permission set, which is for users who don't have a Sales Cloud Einstein or Inbox license. Einstein Activity Capture has a few differences depending on which version you use.

| Einstein Activity Capture Standard | Sales Cloud Einstein and Inbox |
|--|--|
| You can assign the feature to up to 100 Sales Cloud users. | You can assign the feature to any user with a Sales Cloud Einstein or Inbox license. |
| If you have only Standard Einstein Activity Capture users, a maximum of 6 months of activity data is stored and displayed on the activity timeline. | If you have at least one licensed Einstein Activity Capture user, 24 months of data is stored and displayed on the activity timeline. You can change the storage amount from 30 days to 5 years. |
| The Activities dashboard is available in read-only mode from the Activities Dashboard tab. | The Activities dashboard is available from the Analytics tab and Analytics Studio. For Inbox, this applies to Inbox users with the Einstein Analytics for Sales Cloud permission set, which can be assigned to up to five Inbox users. All other Inbox uses have read-only access to the dashboard from the Activities Dashboard tab. |

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Available with Inbox, which is available for an extra cost in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions



Note: The basic setup steps are the same for Einstein Activity Capture Standard and the licensed versions.

SEE ALSO:

Assign Einstein Activity Capture Standard to Sales Cloud Users Set Up Einstein Activity Capture Einstein Activity Capture

Set Up Einstein Activity Capture

Get your sales reps up and running with Einstein Activity Capture. Configure settings, such as controlling which activities are added to Salesforce records and how they're shared. Then, select who can use the feature, and turn it on. Plus, give reps access to the Activities dashboard so they can see a summary of sales activities, including those added with Einstein Activity Capture. The basic setup steps are the same for Einstein Activity Capture Standard and the licensed versions.

Watch a Demo: How Admins Set Up Einstein Activity Capture (English only)



Note: Einstein Activity Capture isn't available in sandbox environments.

1. Exclude Emails and Events from Being Added to Salesforce for All Users

When you add email addresses or domains to the Excluded Addresses list for your org, emails and events with those people or companies aren't added to related Salesforce records. This setting applies to all Einstein Activity Capture users. Users can add more email addresses to their own Excluded Addresses list.

2. Set Default Activity Sharing for Einstein Activity Capture Users

Select whether Einstein Activity Capture users share their emails and events with everyone or keep them private. Users can change their activity sharing at any time from their personal settings.

3. Let Users Share Activities with Groups

Add the Enable email and event sharing field to group layouts. When the setting is selected on a private or unlisted Chatter group, the group members who use Einstein Activity Capture can share activities with each other.

4. Turn On Einstein Activity Capture

Turn on Einstein Activity Capture so that assigned users can connect their email and calendar to Salesforce. Their emails and events are then automatically associated with related Salesforce records. Turning on Einstein Activity Capture also turns on Email Insights.

5. Turn On Einstein Email Insights

Einstein Email Insights give sales reps critical sales context alongside relevant emails, making it easier for them to send the perfect response at the perfect time. If you use Einstein Activity Capture through Sales Cloud Einstein or Inbox, Email Insights is on by default. If you use Einstein Activity Capture through only a Sales Cloud license, you need to turn in on.

6. Select Who Can Use Einstein Activity Capture

Selecting who can use Einstein Activity Capture is as simple as assigning a permission set to users. The exact steps you take depend on whether your users have a Sales Cloud Einstein license, an Inbox license, or only a Sales Cloud license.

7. Give Users Access to the Activities Dashboard

The Activities dashboard provides a summary of sales activities, including those added with Einstein Activity Capture. How users get access to the Activity dashboard depends on whether they have access to Einstein Activity Capture through a Sales Cloud Einstein license, an Inbox license, or only a Sales Cloud license.

8. Delete Email and Events Logged by Einstein Activity Capture and Salesforce Inbox

Honor your customers' requests to delete their personal data in Salesforce email and events. It's easy to delete your customers' activities from storage outside of Salesforce and from appearing on the activity timeline.

EDITIONS

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Enterprise, **Performance**, and **Unlimited** Editions

Available with Inbox, which is available for an extra cost in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

9. Exclude People's Personal Data from Modeling and Data Enrichment

If you use Einstein Activity Capture or Salesforce Inbox, it's easy to honor your customers' requests to exclude their personal data from factoring into machine learning models and third-party data enrichment.

SEE ALSO:

Considerations for Setting Up Einstein Activity Capture
Data Retention for Einstein Activity Capture
Einstein Activity Capture System Requirements

Exclude Emails and Events from Being Added to Salesforce for All Users

When you add email addresses or domains to the Excluded Addresses list for your org, emails and events with those people or companies aren't added to related Salesforce records. This setting applies to all Einstein Activity Capture users. Users can add more email addresses to their own Excluded Addresses list.

- Tip: Make sure your company's domain is added to your org's Excluded Addresses list. Then, emails just between your users aren't added to Salesforce.
- From Setup, enter Excluded Addresses in the Quick Find box, and then select Excluded Addresses. You might be redirected to this page from the Setup Assistant.
- 2. Click Add.
- **3.** Follow the prompts to update the Excluded Addresses list.

Important:

- Although email and events from excluded email addresses and domains are no longer added to related records, they're still stored outside of Salesforce.
- Email and events that have been added to Salesforce aren't removed.

SEE ALSO:

Exclude Emails and Events from Being Added to Salesforce Einstein Activity Capture

EDITIONS

Available in: Lightning Experience

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Available with Sales Cloud Einstein, which is available for an extra cost in:

Enterprise, **Performance**, and **Unlimited** Editions

Available with Inbox, which is available for an extra cost in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

USER PERMISSIONS

To update the org's Excluded Addresses list:

 Customize Application and Modify All Data

Set Default Activity Sharing for Einstein Activity Capture Users

Select whether Einstein Activity Capture users share their emails and events with everyone or keep them private. Users can change their activity sharing at any time from their personal settings.

- From Setup, enter Einstein Activity Capture in the Quick Find box, then select Settings under Einstein Activity Capture. You might be redirected to this page from the Setup Assistant.
- 2. Click Edit Default next to Default Activity Sharing for New Users.
- **3.** Select the default option for new users.
- 4. Click Save.

When new users connect their account to Salesforce with Einstein Activity Capture, their activity sharing is the default that you selected. Users who have already connected their account to Salesforce aren't affected.

SEE ALSO:

Einstein Activity Capture

EDITIONS

Available in: Lightning Experience

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Enterprise, **Performance**, and **Unlimited** Editions

Available with Inbox, which is available for an extra cost in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

USER PERMISSIONS

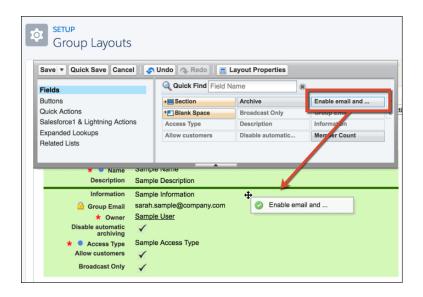
To set default activity sharing for new users:

Customize Application and Modify All Data

Let Users Share Activities with Groups

Add the Enable email and event sharing field to group layouts. When the setting is selected on a private or unlisted Chatter group, the group members who use Einstein Activity Capture can share activities with each other.

- 1. Make sure Chatter is enabled.
- 2. From Setup, enter *Group Layouts* in the Quick Find box, then select **Group Layouts**.
- 3. Add the Enable email and event sharing field to group layouts.



EDITIONS

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Available with Inbox, which is available for an extra cost in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

USER PERMISSIONS

To edit group layouts:

Customize Application

To use a group for sharing emails and events, the group's owner can select Enable email and event sharing on the group's settings. Then, Einstein Activity Capture users within the group can share their emails and events with each other. Email and events appear in the activity timeline of related records, not in Chatter group feeds.

SEE ALSO:

Control How Activities Added by Einstein Activity Capture Are Shared Set Up a Group for Sharing Activities Einstein Activity Capture

Turn On Einstein Activity Capture

Turn on Einstein Activity Capture so that assigned users can connect their email and calendar to Salesforce. Their emails and events are then automatically associated with related Salesforce records. Turning on Einstein Activity Capture also turns on Email Insights.

- **1.** From Setup, enter *Einstein Activity Capture* in the Quick Find box, and then select **Settings**. You might be redirected to this page from the Setup Assistant.
- 2. Turn on Einstein Activity Capture.

The Email Insights setting appears and is turned on for you. If you don't have a Sales Cloud Einstein or Inbox license, you're first prompted to review and accept the Email Insights terms of service.



Note: Turning on Einstein Activity Capture applies to all Einstein Activity Capture users, regardless of whether they have a Sales Cloud Einstein license, an Inbox license, or only a Sales Cloud license. If Einstein Activity Capture is turned off, all email and events that Einstein Activity Capture added to Salesforce records are removed.

SEE ALSO:

Einstein Activity Capture

EDITIONS

Available in: Lightning Experience

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Available with Sales Cloud Einstein, which is available for an extra cost in: **Enterprise**, **Performance**,

and **Unlimited** Editions

Available with Inbox, which is available for an extra cost

is available with inbox, which is available for an extra cost in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

USER PERMISSIONS

To turn on Einstein Activity Capture:

 Customize Application and Modify All Data

Turn On Einstein Email Insights

Einstein Email Insights give sales reps critical sales context alongside relevant emails, making it easier for them to send the perfect response at the perfect time. If you use Einstein Activity Capture through Sales Cloud Einstein or Inbox, Email Insights is on by default. If you use Einstein Activity Capture through only a Sales Cloud license, you need to turn in on.

Einstein Email Insights include the following.

- Meeting Requested, which indicates that the sender is requesting a meeting
- Executive Involved, which indicates that an executive is a sender or a recipient on the email
- Out of Office, which indicates that one of the recipients is away
- Pricing Mentioned, which indicates that the email sender has discussed or asked for pricing
- 1. From Setup, in the Quick Find box, enter *Einstein Activity Capture*, and then select **Settings**. You might be redirected to this page from the Setup Assistant.
- 2. If you use Einstein Activity Capture through a Sales Cloud Einstein or Inbox license, Email Insights is on by default when you turn on Einstein Activity Capture. If you don't have a Sales Cloud Einstein or Inbox license, you're prompted to review and accept the Email Insights terms of service.
 - Sales reps who use Einstein Activity Capture now see email insights, when available, in the activity timeline. For Inbox users, email insights also appear in their inbox.

EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

Available with Sales Cloud Einstein, which is available for an extra cost in: **Enterprise**, **Performance**,

and **Unlimited** Editions

Available with Inbox, which is available for an extra cost in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

USER PERMISSIONS

To turn on Einstein Email Insights:

Customize Application and Modify All Data

Select Who Can Use Einstein Activity Capture

Selecting who can use Einstein Activity Capture is as simple as assigning a permission set to users. The exact steps you take depend on whether your users have a Sales Cloud Einstein license, an Inbox license, or only a Sales Cloud license.

- (1) Important: Make sure you click **Get Started** on either the Sales Cloud Einstein, Inbox, or Einstein Activity Capture setup assistant before you assign users.
- If you use Sales Cloud Einstein, the Sales Cloud Einstein permission set has all the permissions
 for Sales Cloud Einstein features, including Einstein Activity Capture. Follow the steps for assigning
 the permission set to users.
- If you use Inbox, the Inbox With Einstein Activity Capture permission set includes the Einstein Activity Capture permission. Follow the steps for assigning the permission set to users.
- If users don't have Einstein Activity Capture through Sales Cloud Einstein or Inbox, assign the Standard Einstein Activity Capture permission set to those users.

EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

Available with Sales Cloud Einstein, which is available for an extra cost in:

Enterprise, **Performance**, and **Unlimited** Editions

Available with Inbox, which is available for an extra cost in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

USER PERMISSIONS

To assign permission sets:

Assign Permission Sets

To create permission sets:

 Manage Profiles and Permission Sets

Assign Einstein Activity Capture Standard to Sales Cloud Users

The Einstein Activity Capture Standard permission set is already created for you and includes all the permissions needed to use Einstein Activity Capture and view the Activities dashboard. All you need to do is assign the permission set to users.

- Important: The Standard Einstein Activity Capture permission set is for users who don't have a Sales Cloud Einstein or Inbox license. You can assign the permission set to up to 100 Sales Cloud users.
- **1.** Make sure you click **Get Started** on the Einstein Activity Capture setup assistant before you assign users.
- 2. From Setup, enter *Permission Sets* in the Quick Find. Then, select **Permission Sets**.
- 3. Click the Standard Einstein Activity Capture permission set.
- **4.** Click **Manage Assignments** to assign the permission set to up to 100 users.

EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Professional, Enterprise, Performance**, and **Unlimited** Editions

USER PERMISSIONS

To assign permission sets:

Assign Permission Sets

To create permission sets:

 Manage Profiles and Permission Sets **5.** If you haven't already turned on and set up Einstein Activity Capture, from Setup, enter *Einstein Activity Capture* in the Quick Find box. Then, select **Settings** under Einstein Activity Capture.

SEE ALSO:

Set Up Einstein Activity Capture
Turn On Einstein Activity Capture
What Is Einstein Activity Capture Standard?

Give Users Access to the Activities Dashboard

The Activities dashboard provides a summary of sales activities, including those added with Einstein Activity Capture. How users get access to the Activity dashboard depends on whether they have access to Einstein Activity Capture through a Sales Cloud Einstein license, an Inbox license, or only a Sales Cloud license.

- Warning: If you give sales reps access to activity reports, they might see data that's normally hidden by access settings or field-level security.
- For Sales Cloud Einstein users, the Activities dashboard is available through the Sales Cloud Einstein permission set.
- For Inbox users, the Activities dashboard is available through the Einstein Analytics for Sales Cloud or Inbox With Einstein Activity Capture permission set.
- If you don't use Sales Cloud Einstein or Inbox, a read-only version of the Activities dashboard is available through the Standard Einstein Activity Capture permission set.

SEE ALSO:

Assign a Permission Set License to a User Review the Activities Dashboard Einstein Activity Capture

EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

Available with Sales Cloud Einstein, which is available for an extra cost in:

Enterprise, **Performance**, and **Unlimited** Editions

Available with Inbox, which is available for an extra cost in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

USER PERMISSIONS

To give users access to activity reports:

 Customize Application AND Modify All Data

Reassign Einstein Activity Capture for Essentials Users

If a user gets an error when trying to connect their email and calendar to Salesforce, you might need to remove the Einstein Activity Capture permission for the user, and then assign it again.

- 1. From Setup, in the Quick Find box, enter Users, and then select Users.
- **2.** Click the name of the user who encountered the error.
- **3.** In the Permission Set Assignments related list, delete the Inbox With Einstein Activity Capture permission set.
- 4. Click Edit Assignments.
- 5. Add the Inbox With Einstein Activity Capture permission set.
- **6.** Save your changes.

EDITIONS

Available in: **Essentials** edition

USER PERMISSIONS

To create permission sets:

 Manage Profiles and Permission Sets

To assign permission sets:

Assign Permission Sets

Delete Email and Events Logged by Einstein Activity Capture and Salesforce Inbox

Honor your customers' requests to delete their personal data in Salesforce email and events. It's easy to delete your customers' activities from storage outside of Salesforce and from appearing on the activity timeline.

- ① Important: Keep in mind that these steps don't remove data stored in Salesforce or from your email services. So you may need to delete the data from those locations too.
- 1. From Setup, enter *Data Policies* in the Quick Find box, then select **Delete Email and Events** under Data Policies.
- 2. To delete activity by email address:
 - **a.** Click the By Email Address tab, and add the email addresses of the people whose activity you want to delete.
 - **b.** Choose whether to delete all past email and events or all one-to-one email messages and events that include the selected email addresses.
 - c. Click **Delete** and confirm your selection.
- **3.** To delete activity by user:
 - **a.** Click the By User tab, and add the email addresses or user names of the people whose activity you want to delete.
 - **b.** Click **Delete** and confirm your selection.
 - **c.** To avoid data corruption when we stop capturing data for the user, deactivate the user in Salesforce. The user will lose access to Inbox, but you can give the person access to Inbox and Einstein Activity Capture again by provisioning them as a new user.

EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Professional, Enterprise, Performance**, and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available for an extra cost in:

Enterprise, **Performance**, and **Unlimited** Editions

Available with Salesforce Inbox, which is available for an extra cost in: **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To Delete Email and Events

 Customize Application and Modify All Data **4.** We process the request after seven days and it can take up to 21 days to complete. Check the status of activity deletion from the Delete Email and Events page.

SEE ALSO:

Delete Records

Perform Mass Deletes

Deactivate (Delete) Users

Exclude People's Personal Data from Modeling and Data Enrichment

If you use Einstein Activity Capture or Salesforce Inbox, it's easy to honor your customers' requests to exclude their personal data from factoring into machine learning models and third-party data enrichment.

- (1) Important: Keep in mind that these steps remove enriched data. But standard profile data still appears from Salesforce. For example, when you use Salesforce Inbox, profile data from Salesforce still appears.
- 1. From Setup, enter *Data Policies* in the Quick Find box, then select **Excluded from Machine Learning** under Data Policies.
- 2. Add the email addresses of the people to exclude
- 3. Click Exclude and confirm your selection.
- **4.** We process the request after seven days and it can take up to 21 days to complete. Check the status of your exclusions from the Excluded from Machine Learning page.

SEE ALSO:

Einstein Activity Capture Inbox

EDITIONS

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Enterprise, **Performance**, and **Unlimited** Editions

Available with Salesforce Inbox, which is available for an extra cost in: **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To Exclude Data

 Customize Application and Modify All Data

Use Einstein Activity Capture

After your Salesforce admin has enabled Einstein Activity Capture, connect your email and calendar to Salesforce. Then, your emails and events are automatically associated with related Salesforce records. You can also control which activities are shared and how. Plus, review the Activities dashboard to see a summary of sales activities, including the ones added with Einstein Activity Capture.

Watch a Demo: How Users Set Up Einstein Activity Capture (English only)

Connect Your Email and Calendar to Salesforce with Einstein Activity Capture

After Einstein Activity Capture is enabled and ready for you, you need to connect your Google™ or Microsoft® account to Salesforce. Then, your emails and events are automatically associated with related Salesforce records.

Exclude Emails and Events from Being Added to Salesforce

When you add people's email addresses to your Excluded Addresses list, emails and events with those people aren't added to Salesforce by Einstein Activity Capture.

Control How Activities Added by Einstein Activity Capture Are Shared

From your personal settings, choose how to share activities that were associated with Salesforce records by Einstein Activity Capture. You can share with all Einstein Activity Capture users, with Chatter groups, or with no one. Sharing applies only to Einstein Activity Capture users.

Set Up a Group for Sharing Activities

The group's owner or manager can enable email and event sharing for private and unlisted Chatter groups. Then, Einstein Activity Capture users within the group can share their emails and events with each other.

Review the Activities Dashboard

The Activities dashboard provides a summary of sales activities that were added to Salesforce manually and by Einstein Activity Capture.

SEE ALSO:

Einstein Activity Capture

Things to Know About Einstein Activity Capture

EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

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Enterprise, **Performance**, and **Unlimited** Editions

Available with Inbox, which is available for an extra cost in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

Connect Your Email and Calendar to Salesforce with Einstein Activity Capture

After Einstein Activity Capture is enabled and ready for you, you need to connect your Google™ or Microsoft® account to Salesforce. Then, your emails and events are automatically associated with related Salesforce records.

Salesforce prompts you to connect an account and accept the terms of service. After you connect an account, it takes up to 24 hours for Einstein Activity Capture to add your emails and events to related Salesforce records.

- 1. From your personal settings, enter *Einstein Activity Capture* in the Quick Find box, then select **Settings** under Einstein Activity Capture.
- 2. Under Connected Accounts, click New Account.



EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

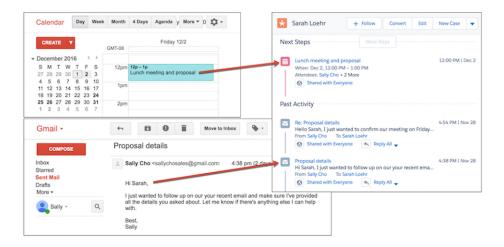
Available with Sales Cloud Einstein, which is available for an extra cost in:

Enterprise, **Performance**, and **Unlimited** Editions

Available with Inbox, which is available for an extra cost in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

3. Follow the steps to connect an account.

After you connect an account, it takes up to 24 hours for Einstein Activity Capture to add your emails and events to related Salesforce records. Because activities added to Salesforce with Einstein Activity Capture aren't stored in Salesforce, they don't show up in standard Salesforce reports. However, Einstein Activity Capture provides access to the Activities dashboard, which is built on Einstein Analytics. The Activities dashboard summarizes sales activities, including activities added with Einstein Activity Capture.



SEE ALSO:

Guidelines for Using Einstein Activity Capture Einstein Activity Capture System Requirements Data Retention for Einstein Activity Capture

Exclude Emails and Events from Being Added to Salesforce

When you add people's email addresses to your Excluded Addresses list, emails and events with those people aren't added to Salesforce by Einstein Activity Capture.



Note: Your Salesforce admin might have added people to the org-wide Excluded Addresses list

- From personal settings, enter Excluded Addresses in the Quick Find box, then click Excluded Addresses.
- 2. Update the Excluded Addresses list.

() Important:

- Although email and events from excluded email addresses and domains are no longer added to related records, they're still stored outside of Salesforce.
- Email and events that have been added to Salesforce aren't removed.

SEE ALSO:

Use Einstein Activity Capture

EDITIONS

Available in: Lightning Experience

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Enterprise, **Performance**, and **Unlimited** Editions

Available with Inbox, which is available for an extra cost in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

Control How Activities Added by Einstein Activity Capture Are Shared

From your personal settings, choose how to share activities that were associated with Salesforce records by Einstein Activity Capture. You can share with all Einstein Activity Capture users, with Chatter groups, or with no one. Sharing applies only to Einstein Activity Capture users.

- 1. From your personal settings, enter *Einstein Activity Capture* in the Quick Find box, then select **Settings** under Einstein Activity Capture.
- 2. Under Sharing Settings for All Emails and Events, click Change.
- **3.** Select who you want to share your emails and events with.

 Everyone refers only to Einstein Activity Capture users, not the entire org. If you share with groups, you can choose up to 20 private or unlisted Chatter groups.

Your sharing setting, which overrides the default sharing set by your Salesforce admin, is applied to all your emails and events, except those that you individually set sharing for. To set sharing setting for an individual email or event, find the email or event on the activity timeline and select a new sharing setting.



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Available with Inbox, which is available for an extra cost in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

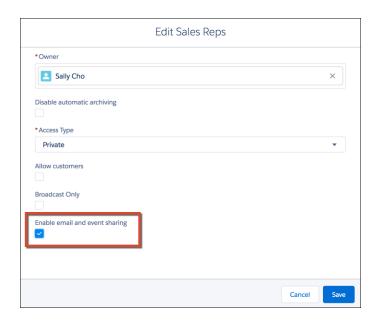
SEE ALSO:

Use Einstein Activity Capture

Set Up a Group for Sharing Activities

The group's owner or manager can enable email and event sharing for private and unlisted Chatter groups. Then, Einstein Activity Capture users within the group can share their emails and events with each other.

- 1. Click the **Groups** tab.
- 2. Create or update a group.
- **3.** Select **Enable email and event sharing**. If this option isn't available, ask your Salesforce admin to add it to the group layout.



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4. Save the group.

Group members who use Einstein Activity Capture can share their emails and events with other group members who use Einstein Activity Capture. Email and events appear in the activity timeline of related records, not in Chatter group feeds.

SEE ALSO:

Let Users Share Activities with Groups Control How Activities Added by Einstein Activity Capture Are Shared Einstein Activity Capture

Review the Activities Dashboard

The Activities dashboard provides a summary of sales activities that were added to Salesforce manually and by Einstein Activity Capture.



Note: Activities added to Salesforce with Einstein Activity Capture don't show up in standard or custom Salesforce reports.

Click the tab that corresponds with your Einstein Activity Capture permissions.

- If you have the Standard Einstein Activity Capture permission set, click the **Activities Dashboard** tab. You see a read-only version of the dashboard.
- If you're an Inbox user with the Access to View-Only Licensed Templates and Apps permission, which is included with the Inbox With Einstein Activity Capture permission set, click the Activities Dashboard tab. You see a read-only version of the dashboard.
- If you're an Inbox user with the Einstein Analytics for Sales Cloud permission set, click the **Analytics** tab. Or, open Analytics Studio, and click the **Activities** app.
- If you're a Sales Cloud Einstein user, click the **Analytics** tab. Or, open Analytics Studio, and click the **Activities** app.

Users with read-only access can view the dashboard and use the filters, but they can't clone or edit the dashboard.

EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Professional** (when API access is purchased), **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available for an extra cost in:

Enterprise, **Performance**, and **Unlimited** Editions

Available with Inbox, which is available for an extra cost in: **Professional** (when API access is purchased),

Enterprise, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To view the Activities app and dashboard:

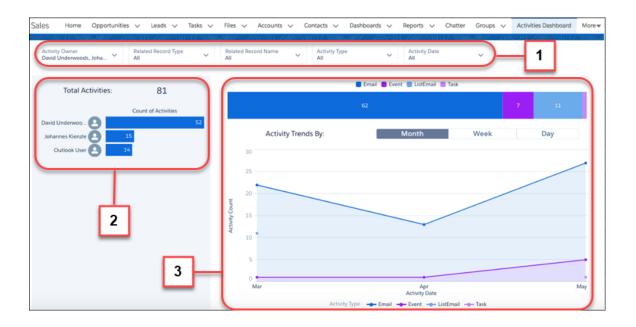
Use Einstein Activity
Capture AND Use
Analytics Templated
Apps OR Access to
View-Only Licensed
Templates and Apps

To create Analytics apps using the Activities app template:

Use Einstein Activity
 Capture AND Manage
 Analytics Templated
 Apps

To delete or reset the Activities app:

 Manage Analytics Templated Apps



Use filters (1) to view information about specific activity owners, activity types, and dates. Quickly view which of the selected users are most active under Total Activites (2). See how each activity type is trending over the past month, week, or day (3).

SEE ALSO:

Give Users Access to the Activities Dashboard Einstein Activity Capture

Things to Know About Einstein Activity Capture

If you use Einstein Activity Capture, review considerations for setting up the feature and guidelines for using it.

Considerations for Setting Up Einstein Activity Capture

Before setting up Einstein Activity Capture, review requirements, limitations, and other information about how it works.

Guidelines for Using Einstein Activity Capture

Understand how using Einstein Activity Capture affects your emails, calendar, and activity timeline.

Data Retention for Einstein Activity Capture

It's important to understand how much of your Einstein Activity Capture data is stored by Salesforce and how much appears on the activity timeline. Einstein Activity Capture data is stored outside of Salesforce and, therefore, doesn't affect your Salesforce data allocations. There's no additional costs for this storage.

EDITIONS

Available in: Lightning Experience

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Einstein Activity Capture System Requirements

Make sure that your system meets the requirements before you set up Einstein Activity Capture.

SEE ALSO:

Einstein Activity Capture

Considerations for Setting Up Einstein Activity Capture

Before setting up Einstein Activity Capture, review requirements, limitations, and other information about how it works.

General

- Einstein Activity Capture is not supported in sandbox environments.
- Einstein Activity Capture works with all Saleforce-supported languages.
- The Last Activity Date field on accounts, contacts, leads, opportunities, and person accounts
 doesn't reflect emails and events that were added to Salesforce with Einstein Activity Capture.
 Therefore, we recommend that you remove the Last Activity Date field from the page layouts
 for those objects.
- Custom objects aren't supported. When emails are sent from a custom object, the email is logged on the activity timeline of the associated contact.
- Emails exchanged between a user's internal domain aren't associated with Salesforce records, regardless of the Excluded Addresses settings. For example, if John Smith connects his account john@acme.com to Salesforce, no emails or events to or from john@acme.com are associated with the John Smith contact record in Salesforce.
- Platform encryption isn't supported, so emails and events that are added to Salesforce with Einstein Activity Capture aren't encrypted. If platform encryption is enabled for your org, emails and events associated with Salesforce records don't show the names of encrypted contacts and leads.

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Analytics

- After Einstein Activity Capture is enabled, the Activities dashboard is created. If you don't see the dashboard after 24 hours, go to the Einstein Activity Capture setting page. Turn off Einstein Activity Capture, and then turn it on again.
- To access the Activities dashboard, API access is required. If you use Professional Edition, you need to purchase API access. If you use Sales Cloud Lightning Essentials, you can't access the Activities dashboard because API access isn't available.

SEE ALSO:

Things to Know About Einstein Activity Capture Set Up Einstein Activity Capture

Guidelines for Using Einstein Activity Capture

Understand how using Einstein Activity Capture affects your emails, calendar, and activity timeline.

General

- After you connect your account to Salesforce, it takes up to 24 hours for your activities to be added to Salesforce records.
- The Assistant might not work as expected. For example, alerts in the Assistant don't reflect emails and events added to Salesforce with Einstein Activity Capture. Also, emails that you send from the Assistant don't go through your connect email account.
- When using Einstein Activity Capture, Google Hangouts is mapped only to the Conference field in Salesforce.

Record Association

Email and events are associated with related business account, person account, contact, contract, lead, opportunity, and quote records in Salesforce. The data used to relate an email or event to a record varies based on the record.

| Record | Data |
|-------------------------------|---|
| Opportunity | Opportunity contact role |
| Business account | Account team members |
| Person account, contact, lead | Email address from standard Email field |
| Contract | Email address from the standard Email field in the Prepared For section |
| Quote | Email address of the person who is listed in the Customer Signed By field |

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Email

- After connecting your email and calendar to Salesforce, emails sent from Salesforce go through your connected email account. Therefore, you can't send emails from Salesforce using an org-wide email address.
- Files attached to emails aren't added to Salesforce records and can't be viewed in Salesforce.
- When sending emails from Salesforce, Einstein Activity Capture users can't send emails that include executable files, such as .pkg and .js files, as attachments.
- If two or more contacts or leads have the same email address, Salesforce adds related emails or events to both records. If one of the records is related to an account or opportunity, only emails and events from the most recently updated record show up on the account or opportunity.

Calendar

- Salesforce adds Google Calendar events to your Salesforce calendar and adds Office 365 events to Microsoft Calendar.
- Changes to events in Salesforce aren't reflected in Google or Microsoft calendars.
- If you update an event that started two or more days previously, the update isn't reflected in Salesforce.

• Your Salesforce calendar doesn't show Google events starting more than a month before and ending more than a month after the period that you're viewing.

Access and Sharing

- Only Einstein Activity Capture users can see emails and events added to Salesforce with Einstein Activity Capture.
- Your Salesforce admin sets the defaults for how activities are shared, but you can change activity sharing from your personal settings.
- When you share an individual email or event with a group and then delete the group, the setting for the individual email or event is removed.
- All senders and recipients own an email. All guests own an event. Only the owner of an email or event can control how its full contents are shared in Salesforce. If multiple people own an email or event, the most permissive settings win. For example, you share an email with three groups. Your colleague shares the email with two other groups. Then, the email is shared with all five groups.

Activity Timeline

- The filter options differ from what users without Einstein Activity Capture see.
- Einstein Activity Capture users have a filter option to show only emails that have insights.
- The All Activity History tab doesn't include activities added to Salesforce with Einstein Activity Capture.
- For a quote's activity timeline and reports, Salesforce adds only emails and events with a contact's primary email address or the email address on the quote.
- Einstein Activity Capture adds an activity to a related record only if the activity occurred between the record's start and end dates. To review the activity dates for all objects supported by Einstein Activity Capture, go to the Einstein Activity Capture settings page in Setup. Quotes without an expiration date are also added to related records.

Analytics

- Because activities added to Salesforce with Einstein Activity Capture aren't stored in Salesforce, they don't show up in standard Salesforce reports. However, Einstein Activity Capture provides access to the Activities dashboard, which is built on Einstein Analytics. The Activities dashboard summarizes sales activities, including activities added with Einstein Activity Capture.
- The following users have read-only access to the Activities dashboard from the Activities Dashboard tab. Users with read-only access can view the dashboard and use the filters, but they can't clone or edit the dashboard.
 - Einstein Activity Capture users with the Standard Einstein Activity Capture permission set
 - Inbox users with the Access to View-Only Licensed Templates and Apps permission
- Activity metrics include activities only from the previous 90 days, and the metrics don't include future events.
- If you exclude role hierarchy information from the Activities that comes with Einstein Activity Capture, Salesforce still uses role hierarchy information in your data jobs. However, your dashboards don't include role hierarchy information.

API

When emails are sent through the SendEmail API, such as by Apex or SOAP, how the emails are logged as activities varies.

- For users that don't use Einstein Activity Capture and haven't authenticated with OAuth, emails are logged as activities and shown in a record's activity history.
- For users that don't use Einstein Activity Capture and have authenticated with OAuth, emails are logged as activities and shown in a record's activity history.
- For Einstein Activity Capture users who haven't authenticated with OAuth, emails are logged as activities and shown in a record's activity history.

• For Einstein Activity Capture users who have authenticated with OAuth, emails aren't logged as activities and shown in a record's activity history. Instead, Einstein Activity Capture records the activity.

SEE ALSO:

Use Einstein Activity Capture
Things to Know About Einstein Activity Capture

Data Retention for Einstein Activity Capture

It's important to understand how much of your Einstein Activity Capture data is stored by Salesforce and how much appears on the activity timeline. Einstein Activity Capture data is stored outside of Salesforce and, therefore, doesn't affect your Salesforce data allocations. There's no additional costs for this storage.

Ø

Note:

- If your org has at least one Sales Cloud Einstein or Inbox license, the data retention policy for that license applies to all Einstein Activity Capture users.
- Retention periods begin when an activity occurs, not when it's added to Salesforce.

| License | How much data is stored when Google [™] or Microsoft® account is connected | How much data is stored over time | How much data is available on the activity timeline |
|----------------------|---|--|---|
| Sales Cloud Einstein | 6 month for Google 12 months for Microsoft | Default is 24 months Contact Salesforce Customer Support to change the storage amount from 30 days to 5 years. | 24 months |
| Inbox | 6 month for Google 12 months for Microsoft | Default is 24 months Contact Salesforce Customer Support to change the storage amount from 30 days to 5 years. | 24 months |
| Sales Cloud | 6 months for Google 6 months for Microsoft | Default is 6 months Cannot change the storage amount | 6 months |

EDITIONS

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Enterprise, **Performance** and **Unlimited** Editions

Available with Inbox, which is available for an extra cost in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

After the data retention period has passed, the data is removed from the system. For example, if the data retention period is 24 months, any activity that occurred more than 24 months ago is deleted from storage and the activity timeline. Activities captured by Einstein Activity Capture aren't archived.

Sales Productivity Email

Einstein Activity Capture System Requirements

Make sure that your system meets the requirements before you set up Einstein Activity Capture.

| Service Provider | Supported Versions | Additional Settings to Enable |
|------------------|--|--|
| Microsoft | Exchange Server 2016 or 2013 Exchange Online with Office 365 Exchange hybrid deployments | Exchange Web Services (EWS) on an SSL connection Exchange Autodiscover Service |
| G Suite | Gmail and Google Calendar | |

Email

Supercharge your productivity with a number of options for sending email right from Salesforce.

EDITIONS

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and **Unlimited** Editions

and **Unlimited** Editions

Available with Inbox, which is available for an extra cost in: Essentials, Professional, Enterprise, Performance,

Send Email from Salesforce

Your users are in Salesforce all day long to review customer information, log activity, and create reports. So, why not make it easy on them and let them send email right from Salesforce?

Connect Offline with Lightning Platform in Salesforce Classic

Manage Email in Lightning Experience

If you're using Lightning Experience, you can email contacts, leads, and your own colleagues directly from account, person account, contact, lead, opportunity, campaign, and case records you have access to. You can send an email to any valid email address, and attach files to your emails.

Manage Email in Salesforce Classic

If you're using Salesforce Classic, use Email Author to email your contacts, leads, person accounts, and coworkers directly from account, contact, lead, opportunity, case, campaign, or custom object pages.

Manage the Admin Details of Email

Several options for using email, such as organization-wide email address, are set up by an admin for users.

Relate Emails to Records with Email to Salesforce

It's easy to track your sales-related communications. Use Email to Salesforce to capture email sent with external email applications such as IBM® Lotus Notes® and Microsoft® Outlook® and with webmail such as Gmail® and Yahoo! Mail®. Then relate those emails to leads, contacts, and opportunities, or to other specific records in Salesforce.

Send Email to a Group: List Email and Mass Email

To send an individual copy of an email to a group of people, use list email and mass email. Create a list of recipients to target the email. Use templates with merge fields to personalize each copy of the email.

Send Email from Salesforce

Your users are in Salesforce all day long to review customer information, log activity, and create reports. So, why not make it easy on them and let them send email right from Salesforce?

Which Option for Sending Email from Salesforce Is Best for Your Organization?

There are several options that let your users send email right from Salesforce. These options depend on whether your organization uses Lightning Experience, whether your company owns an email domain, and which email application your company uses.

Send Through Gmail or Office 365

Send email from Salesforce using your Gmail or Office 365 accounts. Then, to recipients, emails look like they were sent from your Gmail or Office 365 accounts. You can also see the emails they've sent in their Gmail or Office 365 Sent Items folder.

Send Through Salesforce

Send email from Salesforce using the Salesforce servers. No need to integrate with an external email service. This a great approach if you're using Salesforce Classic, need bounce management, or aren't using Gmail $^{\text{m}}$ or Office 365 $^{\text{m}}$ with Lightning Experience.

Send Email Through Email Relay

Use your company's email server to send email from Salesforce. Storing email locally helps you meet compliance goals, and your users can see the emails they've sent from Salesforce in their company email Sent Items folder. Also, routing all email through your own email servers prevents the appearance of email spoofing by Salesforce. Email spoofing is the forging of email headers to make messages appear as if they came from someone other than the original sender.

Email Editions and Permissions in Lightning Experience

Salesforce email and email templates are available in several editions. Enable features and manage permissions and access at the organization level and for administrators and end users.

Email and Email Template Allocations per Edition

See the allocations for email and email templates per edition.

Which Option for Sending Email from Salesforce Is Best for Your Organization?

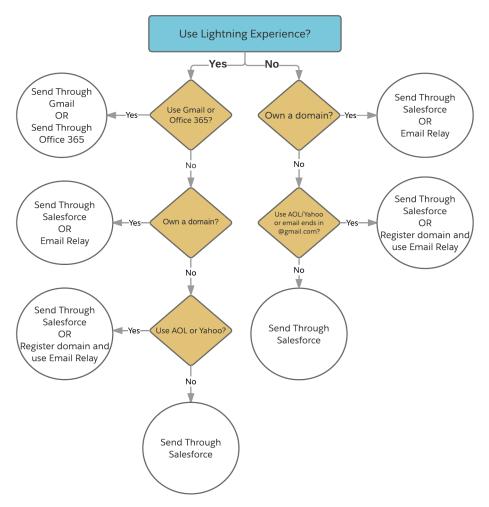
There are several options that let your users send email right from Salesforce. These options depend on whether your organization uses Lightning Experience, whether your company owns an email domain, and which email application your company uses.

Use this flowchart to figure out which option for sending email from Salesforce is right for your org. It all starts with whether you use Lightning Experience or not.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions



*If your email addresses end in @aol.com, @yahoo.com, and @gmail.com and you want to use Email Relay, you need to register for your own domain. This is due to the Domain-based Message Authentication, Reporting & Conformance (DMARC) policy at Gmail, AOL[™], and Yahoo[™]. Learn More

SEE ALSO:

Send Through Gmail or Office 365

Send Through Salesforce

Send Email Through Email Relay

Send Through Gmail or Office 365

Send email from Salesforce using your Gmail or Office 365 accounts. Then, to recipients, emails look like they were sent from your Gmail or Office 365 accounts. You can also see the emails they've sent in their Gmail or Office 365 Sent Items folder.

Available in: Lightning Experience

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

Considerations for Send Email through Gmail[™] or Office 365[™]

Review a few details before setting up Send through Gmail or Office 365, including details about triggers and workflow rules and information for organizations that use Communities.

Set Up Send Email from Salesforce with Gmail[™] or Office 365[™]

Set up your users to send email in Salesforce using their Gmail or Office 365 accounts. When you enable an external email service, it is enabled for all users with the standard user profile or with the Send Email through External Email Service user permission.

Send Email Through Gmail[™] or Office 365[™] in Lightning Experience

Send your Salesforce email through your Gmail or Office 365 account. Emails sent in Lightning Experience look like they were sent from your Gmail or Office 365. You can also see the emails you've sent in your Gmail or Office 365 Sent Items folder.

Considerations for Send Email through Gmail[™] or Office 365[™]

Review a few details before setting up Send through Gmail or Office 365, including details about triggers and workflow rules and information for organizations that use Communities.

- Send through Gmail or Office 365 is not available in Communities. If your organization has Send
 Through Gmail or Office 365 enabled, it will not work in Communities. Instead, emails sent in
 Communities will go through Salesforce or Email Relaying, depending on which option your
 organization has configured.
- If you use Send through Gmail, you can visit your My Email Settings page in Salesforce to
 customize the name that shows up in the From field of your outgoing emails. If you use Send
 Through Office 365, you can't change the name in Salesforce.

EDITIONS

Available in: Lightning Experience

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

When using Send through Gmail or Office 365:

- Emails are not stored in Salesforce email logs, which are only used for emails sent through Salesforce. This means email delivery information is not available in Salesforce. Obtain email logs from Gmail or Office 365.
- Emails sent by triggers and workflow rules are still sent through Salesforce.
- Bounce management isn't supported, so contacts and leads aren't automatically updated with bounce information. However, you can view bounced emails in your email inbox. If you require bounce management, use Send through Salesforce instead.
- Transport Layer Security (TLS) is handled through the external email service and not through Salesforce settings.
- Organization-wide footers do not appear in emails sent from Salesforce.

SEE ALSO:

Send Through Gmail or Office 365

Set Up Send Email from Salesforce with Gmail[™] or Office 365[™]

Set Up Send Email from Salesforce with Gmail[™] or Office 365[™]

Set up your users to send email in Salesforce using their Gmail or Office 365 accounts. When you enable an external email service, it is enabled for all users with the standard user profile or with the Send Email through External Email Service user permission.

Available in: Lightning Experience

Setup available in: Lightning Experience and Salesforce Classic.

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

USER PERMISSIONS

To set up send email from Salesforce with Gmail or Office 365

Customize Application

When using Microsoft Azure to send email through Office 365, these delegated permissions for the default Salesforce application are required for the Microsoft Graph API.

- Send mail as user
- Sign-in and read user profile

Use Azure's application roles to assign these permissions.

- 1. From Setup, in the Quick Find box, enter *Send through External Email Services*, and then select **Send through External Email Services**.
- 2. Select either Send through Gmail or Send through Office 365.
- 3. From Setup, enter <code>Deliverability</code> in the Quick Find box, then select **Deliverability** under Email.
- 4. Set the access level for sending email to All email.

Users can send email through the external service in the Lightning Experience Email Composer using the OAuth industry standard. User credentials aren't stored within Salesforce.

Users can choose between sending through the external service or through Salesforce the first time they use the email action. Users can manage their external and Salesforce email configuration from My Email Settings in their personal settings.



Note: With Email Relay, users can send email through an external service or Salesforce.

SEE ALSO:

Send Through Gmail or Office 365

Considerations for Send Email through Gmail™ or Office 365™

Send Email Through Gmail[™] or Office 365[™] in Lightning Experience

Send your Salesforce email through your Gmail or Office 365 account. Emails sent in Lightning Experience look like they were sent from your Gmail or Office 365. You can also see the emails you've sent in your Gmail or Office 365 Sent Items folder.

Emails sent through workflows and triggers are still sent through Salesforce. Also, bounce management isn't supported when you send through external email accounts.

Email delivery information for Send through Gmail or Office 365 is not available in the email logs. Use the email logs from Gmail or Office 365 instead.

- 1. From your personal settings, enter *My Email Settings* in the Quick Find box, and then select **My Email Settings**.
- Select how you'd like to send your email.
 Your Salesforce admin can enable either Gmail or Office 365 for your org. You can't choose between the two.
- 3. Click Save.

EDITIONS

Available in: Lightning Experience

Available in: Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To send email from Salesforce through Gmail or Office 365:

Send Email

AND

Send Email through External Email Service

AND

Access to the record the email is sent from

Send Through Salesforce

Send email from Salesforce using the Salesforce servers. No need to integrate with an external email service. This a great approach if you're using Salesforce Classic, need bounce management, or aren't using Gmail $^{\mathbb{T}}$ or Office 365 $^{\mathbb{T}}$ with Lightning Experience.

Considerations for Setting Up Send through Salesforce

Review a few details before setting up Send through Salesforce, including details about bounce management and spam.

Set Up Send Email Through Salesforce

Review a few details before setting up Send through Salesforce, including details about bounce management and spam.

Improve Deliverability of Emails Sent from Salesforce

Email deliverability is the likelihood of a company's or individual's email reaching its intended recipient. To improve the deliverability of email you send through Salesforce, we offer severalsettings and compliance options.

Use Email Logs to Monitor Emails Sent from Salesforce in Salesforce Classic

Get the most out of sending email from Salesforce with features that let you monitor emails, including email logs and the mass email queue. With email logs, you can easily monitor emails sent through Salesforce in the last 30 days. Logs contain information on each email, including the sender and recipient, date and time, delivery status, and any associated error codes. Email logs are in CSV format.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: All Editions

Considerations for Setting Up Send through Salesforce

Review a few details before setting up Send through Salesforce, including details about bounce management and spam.

- Send through Salesforce is a good option if:
 - You need bounce management.
 - You don't want to integrate Salesforce with an external email service.
 - You aren't using Gmail[™] or Office 365[™] with Lightning Experience.
- If email authentication is not configured properly following the recommendations below, emails are flagged as spam by certain email providers.

• If your company doesn't own the domain or has bounce management enabled, your sent emails may be identified as being sent through Salesforce and may appear like they're coming from you.

- If the Deliverability settings, Enable compliance with standard email security mechanisms or Activate bounce management, are enabled, Gmail recipients see extra information
- If Enable Sender ID compliance is enabled, Outlook and email clients supporting Sender ID don't see "Sent on behalf of [sender name]."
- If your company owns a domain, we recommend that you set up email authentication methods like Sender Policy Framework (SPF) or DomainKeys Identified Mail (DKIM) in your DNS. This ensures better delivery and acceptance by recipients.

Set Up Send Email Through Salesforce

Review a few details before setting up Send through Salesforce, including details about bounce management and spam.

For Companies that Own a Domain (mycompany.com)

- 1. Turn off "Enable compliance with standard email security mechanisms."
- **2.** Turn off "Enable Sender ID compliance."
- **3.** Add Salesforce's SPF record to client's domain DNS to indicate that Salesforce is an approved sender.
- **4.** Set up DKIM for better deliverability.

For Companies that Don't Own a Domain

If your email address domain is not owned by your company and ends in @gmail.com, @aol.com or @yahoo.com, register for a domain that you control, and use this new domain for all of your emails sent from Salesforce due to the Domain-based Message Authentication, Reporting & Conformance (DMARC) policy at Gmail, AOL™, and Yahoo™. Learn More

- 1. Turn on "Enable compliance with standard email security mechanisms."
- 2. Turn off "Enable Sender ID compliance."

We recommend enabling Sender ID compliance only if you have recipients using the Sender ID email authentication protocol, which isn't widely used.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: All Editions

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: All Editions

Improve Deliverability of Emails Sent from Salesforce

Email deliverability is the likelihood of a company's or individual's email reaching its intended recipient. To improve the deliverability of email you send through Salesforce, we offer severalsettings and compliance options.

Test the Deliverability of Emails Sent Through Salesforce

When a user sends an email through Salesforce, the email is routed through one of a number of possible Salesforce IP addresses. If the email's recipient blocks any of these IP addresses, the email might not be received. It's hard to test whether your customers are receiving emails from all possible Salesforce IP addresses. However, using the Test Deliverability feature, you can easily send an emails to yourself from each of the potential Salesforce IP addresses. If you receive all emails, then you aren't blocking any of the Salesforce IP addresses.

Configure Deliverability Settings for Emails Sent from Salesforce

Use the available deliverability options to configure your Salesforce org so that your users' emails from Salesforce get where they're going fast.

Guidelines for Configuring Deliverability Settings for Emails Sent from Salesforce

Two things affect email deliverability: past bounced emails to the same email domain, and email that doesn't comply with a recipient's email security framework. Check out some guidelines to help you handle these roadblocks so your users' emails get where they're going fast.

Create a DKIM Key in Salesforce Classic

Use the DKIM (DomainKeys Identified Mail) key feature to enable Salesforce to sign outbound emails sent on your organization's behalf. A valid signature provides recipients confidence that the email was handled by a third party such as Salesforce in a way authorized by your organization.

Import a DKIM Key in Salesforce Classic

Use the DKIM (DomainKeys Identified Mail) key feature to enable Salesforce to sign outbound emails sent on your organization's hebalf

Enabling Compliance BCC Emails

SEE ALSO:

Send Email from Salesforce

Test the Deliverability of Emails Sent Through Salesforce

When a user sends an email through Salesforce, the email is routed through one of a number of possible Salesforce IP addresses. If the email's recipient blocks any of these IP addresses, the email might not be received. It's hard to test whether your customers are receiving emails from all possible Salesforce IP addresses. However, using the Test Deliverability feature, you can easily send an emails to yourself from each of the potential Salesforce IP addresses. If you receive all emails, then you aren't blocking any of the Salesforce IP addresses.

- From Setup, enter Test Deliverability in the Quick Find box, then select Test
 Deliverability.
- 2. Enter your business email address.
- **3.** Click **Send**. Salesforce sends a test message from all IP addresses to your business email address. Each test message specifies the IP address from which it was sent.
- **4.** To make sure that you received all test messages, check your business email account.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **All** Editions except **Database.com**

USER PERMISSIONS

To test email deliverability:

Modify All Data

If you didn't receive all the test messages, your organization's email administrator must whitelist the Salesforce IP ranges on your organization's email server. Whitelisting an IP address allows the email server to receive email from an IP address that is otherwise blocked. For a current list of Salesforce IP ranges, see What are the Salesforce IP Addresses to whitelist?.

Salesforce maintains separate IP addresses for inbound and outbound email. The IP addresses used for outbound email don't accept inbound email connections.

SEE ALSO:

Guidelines for Configuring Deliverability Settings for Emails Sent from Salesforce Enabling Compliance BCC Emails

Configure Deliverability Settings for Emails Sent from Salesforce

Use the available deliverability options to configure your Salesforce org so that your users' emails from Salesforce get where they're going fast.

- 1. From Setup, enter Deliverability in the Quick Find box, then select Deliverability.
- **2.** Select the options that apply to your Salesforce org.

SEE ALSO:

Improve Deliverability of Emails Sent from Salesforce

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **All** Editions except **Database.com**

USER PERMISSIONS

To configure email deliverability:

Customize Application

Guidelines for Configuring Deliverability Settings for Emails Sent from Salesforce

Two things affect email deliverability: past bounced emails to the same email domain, and email that doesn't comply with a recipient's email security framework. Check out some guidelines to help you handle these roadblocks so your users' emails get where they're going fast.

Using the Deliverability page in Setup, you can improve email deliverability.

- To control the type of email that your organization sends, use the Access level option in the Access to Send Email section. The available options include:
 - No access: Prevents all outbound email to and from users.
 - System email only: Allows only automatically generated emails, such as new user and password reset emails. Especially
 useful for controlling email sent from sandboxes so that testing and development work doesn't send test emails to your users.
 Newly created sandboxes default to System email only.
 - All email: Allows all types of outbound email. Default for new, non-sandbox organizations. Sandboxes created before Spring
 '13 default to All email.
 - Note: To see the Send Email quick action in the activity composer, as the Email tab, choose All email.
- When using bounce management:
 - If you also use Email Relay, make sure that your organization's email server allows the relaying of email sent from Salesforce.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: All Editions

- If an email to the address for a contact, lead, or person account bounces, an alert shows up next to the address. Other users can't send an email to the address until it's updated or confirmed.

- Emails bounce to Salesforce and not to the sender's personal email account.
- Use the Bounced Contacts and Bounced Leads standard report to view a list of email all addresses that have bounced email. The
 report includes the reason the email was bounced, the date the bounce occurred, and the contact, lead, or person account that
 bounced the email.
- To comply with your recipients' email security frameworks like SPF:
 - Check Enable compliance with standard email security mechanisms. This setting modifies the envelope From address of emails sent from Salesforce. The header From address remains set to the sender's email address. Usually security frameworks only check the envelope address.
 - If you have recipients using the sender ID email authentication protocol, which isn't widely used, check Enable Sender ID compliance. This setting modifies the Sender field in the envelope of emails sent from Salesforce to automatically include no-reply@Salesforce. All replies from the recipients are still delivered to the sender's email address. The recipients' email client (not Salesforce) may append the phrase "Sent on behalf of" to the From field of emails sent from Salesforce.
- To specify how Salesforce uses the Transport Layer Security (TLS) protocol for secure email communication for SMTP sessions, select a TLS Setting. The available options include:
 - Off—TLS is turned off. SMTP session continues through an insecure connection.
 - Preferred—If the remote server supports TLS, Salesforce upgrades the current SMTP session to use TLS. If TLS is unavailable, Salesforce continues the session without TLS.
 - Required—Salesforce continues the session only if the remote server supports TLS. If TLS is unavailable, Salesforce terminates
 the session without delivering the email.
 - Preferred Verify—If the remote server supports TLS, Salesforce upgrades the current SMTP session to use TLS. Before the session begins, Salesforce verifies that a valid certificate authority has signed the certificate, and that the common name presented in the certificate matches the domain or mail exchange of the current connection. If TLS is available but the certificate is not signed or the common name does not match, Salesforce disconnects the session and does not deliver the email. If TLS is unavailable, Salesforce continues the session without TLS.
 - Required Verify— Salesforce continues the session only if the remote server supports TLS, a valid certificate authority has signed
 the certificate, and the common name presented in the certificate matches the domain or mail exchange to which Salesforce
 is connected. If any of these criteria are not met, Salesforce terminates the session without delivering the email.
- If you select a setting other than Preferred (the default setting), select Restrict TLS to these domains and specify a comma-separated domain list. The asterisk (*) wildcard is allowed; for example, *.subdomains.com matches john@aco.subdomains.com and john@bco.subdomains.com (but not john@subdomains.com). If you don't specify domains, Salesforce uses the TLS setting you specify for all outbound emails. This can cause undelivered emails.



SEE ALSO:

Improve Deliverability of Emails Sent from Salesforce
Enabling Compliance BCC Emails
Considerations for Setting Up Email Relay
Set Up Email Relay
Test the Deliverability of Emails Sent Through Salesforce
Knowledge Article: Salesforce TLS 1.0 Email Disablement

Create a DKIM Key in Salesforce Classic

Use the DKIM (DomainKeys Identified Mail) key feature to enable Salesforce to sign outbound emails sent on your organization's behalf. A valid signature provides recipients confidence that the email was handled by a third party such as Salesforce in a way authorized by your organization.

When you create a DKIM key, Salesforce generates a public and private key pair. Publish the public key in the DNS. This key tells recipients that you, as the owner of the domain, have authorized the use of this key to sign your mail. Salesforce uses the private key to create DKIM signature headers on your outgoing email. Recipients of the mail can compare the signature header with the public key in the DNS to determine that the mail was signed with an authorized key. If your domain also publishes a Domain-based Message Authentication, Reporting and Conformance (DMARC) policy, recipients can use the DKIM signature to verify that the mail conforms to DMARC.

To create a new key:

- 1. From Setup, enter DKIM Keys in the Quick Find box, then select DKIM Keys.
- 2. Click Create New Key.
- **3.** For Selector, enter a unique name.
- **4.** Enter your Domain name.
- **5.** Select the type of Domain Match you'd like to use.
- 6. Click Save.
- The key defaults to Inactive state. Make sure that you add the public key to the DNS record before activating the key. DKIM signing is active whenever you have an active DKIM key.
- When publishing to the DNS, use these guidelines to format the name and values of the public key.
 - The name of the txt file is formed from the selector, followed by "._", then the domain key, followed by ".", and then the domain name: selector. domainkey.domain.com.
 - The value in the txt file is in the format v=DKIM1; k=rsa; p=MHww..., where the value after p= is the public key.
- You can't have more than one active DKIM key per domain name. You can have multiple active DKIM keys if your organization sends mail from more than a single domain or if you use subdomains under your organizational domain and have specified domain matching at the subdomain level.
- When you insert or update a domain key, it's possible that the change affects existing DKIM keys. For example, if you've set DomainMatch to DomainAndSubdomains for the example.com domain, and you then set DomainMatch to SubdomainsOnly for the mail.example.com domain, either key could be used. Here's how we resolve conflicts in the case when domain keys overlap.
 - If two keys are equally specific about matching for the same domain, the new key replaces and deactivates the existing key.
 - If a new key is more specific about matching than an existing key, the new key is used. The existing key is modified to no longer apply to the case covered by the new key. For example, because DomainOnly and SubdomainsOnly are more specific than DomainAndSubdomains, a new DomainOnly key would change the DomainMatch for an existing DomainAndSubdomains key to become SubdomainsOnly.
 - If multiple keys have different domains that match the sending domain, the key with the longest domain name is used. In a tie, the most specific key is used.

EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions

USER PERMISSIONS

Manage DKIM Keys

Customize Application

For information about DKIM, see http://dkim.org

SEE ALSO:

Improve Deliverability of Emails Sent from Salesforce Import a DKIM Key in Salesforce Classic

Import a DKIM Key in Salesforce Classic

Use the DKIM (DomainKeys Identified Mail) key feature to enable Salesforce to sign outbound emails sent on your organization's behalf.

Some companies have multiple Salesforce organizations, and users in those organizations share a domain name in their email address. Therefore, companies that want Salesforce to sign the email sent by those users sometimes want to share DKIM keys. You can do that using this page.

First, create the key and ensure it's working for one organization. To import and use it in another organization, copy the selector name, domain name, and public and private key data from the working key. You can get this data from the detail page for the key you want to import. After you've copied the key data, log in to the target organization and follow these steps to import the key.

- 1. From Setup, enter DKIM Keys in the Quick Find box, then select DKIM Keys.
- 2. Click Import a Key.
- 3. Enter the same selector name you copied from the original organization.
- **4.** Enter the same domain name you copied from the original organization.
- **5.** Paste in the public and private key data you copied into their respective fields.
- **6.** Select the type of Domain Match you'd like to use. Most likely you'll use the same value that was selected for the key in the original organization.
- 7. Click Save.

Because the public and private key data worked for the original organization, you can typically activate the key in the target organization immediately.



Note: The private key data is an encrypted form of the private key data that's used to sign emails. It's decrypted internally when signing emails. Therefore, it can be used only within Salesforce. For example, you can't take the public and private key data and plug it into an external mail system.

SEE ALSO:

Improve Deliverability of Emails Sent from Salesforce Create a DKIM Key in Salesforce Classic

EDITIONS

Available in: Salesforce Classic

Available in: All Editions

USER PERMISSIONS

To manage DKIM Keys

Customize Application

Enabling Compliance BCC Emails

If your organization evaluates all outbound email messages for compliance, you can enable compliance BCC emails. This feature automatically sends a hidden copy of each outbound email message to an email address you specify. Enabling compliance BCC emails prevents users from editing the BCC field on any email and disables their Automatic Bcc setting under My Email Settings.

To enable compliance BCC emails for your organization:

- From Setup, enter Compliance BCC Email in the Quick Find box, then select Compliance BCC Email.
- 2. Select the Enable checkbox.
- 3. Enter your compliance email address.
- 4. Click Save.
- Note: The BCC email is automatically sent to the specified address for any emails your users send, excluding system emails such as password reset or import completion notifications.
- Note: When compliance BCC email is enabled, you can't use predefined values for the BCC field in the Send Email action.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

USER PERMISSIONS

To enable or disable compliance BCC email:

Customize Application

SEE ALSO:

Send Email Action Considerations for Cases

Use Email Logs to Monitor Emails Sent from Salesforce in Salesforce Classic

Get the most out of sending email from Salesforce with features that let you monitor emails, including email logs and the mass email queue. With email logs, you can easily monitor emails sent through Salesforce in the last 30 days. Logs contain information on each email, including the sender and recipient, date and time, delivery status, and any associated error codes. Email logs are in CSV format.

Considerations for Using Email Logs

Before using email logs for your Salesforce org, review a few details.

Request an Email Log

With email logs, you can easily monitor emails sent through Salesforce in the last 30 days. It's a cinch to request a new log at any time.

Email Log Reference

Understand the format and field values of email log files.

SEE ALSO:

Send Email from Salesforce

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Email Logs is available in: **All** Editions

Mass Email Queue is available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Considerations for Using Email Logs

Before using email logs for your Salesforce org, review a few details.

- Requests for email logs are queued in the order that they are received. Email logs should be available within 30 minutes of your request.
- The pending email log requests list provides the status on email log requests that have not yet completed.
- The email log errors list provides descriptions for requests that failed. You can't resubmit a failed
 request if it requires data that has exceeded the 30 day limit, or if you already have three pending
 requests.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: All Editions

- Email logs are CSV files contained within a compressed file that contains a maximum of 100,000 records. Since email log requests return up to 500,000 records, there can be up to five .zip files to download. Logs contribute to your overall file storage limits.
- You can have a maximum of three pending log requests at one time. If you already have three pending requests, you cannot request another log until at least one of those requests completes.
- Email logs are available for messages sent within the past 30 days before your request.
- Each email log can span a maximum of seven days. To see email log data for a duration longer than seven days, create multiple requests.
- Email logs include emails sent through email actions, list email, and mass email, as long as the emails are sent through Salesforce.
- Emails sent through external systems such as Gmail or Office 365 are not shown in email logs.

SEE ALSO:

Use Email Logs to Monitor Emails Sent from Salesforce in Salesforce Classic

Request an Email Log

With email logs, you can easily monitor emails sent through Salesforce in the last 30 days. It's a cinch to request a new log at any time.

- 1. From Setup, enter *Email Log Files* in the Quick Find box, then select **Email Log Files**.
- 2. Click Request an Email Log.
- 3. Optionally, you can filter an email log to only include rows where a specific domain name or email address appears in a field, such as Recipient or Message ID Header. To enter more than one filter term, separate each value with a comma. If you leave this field blank, the log is not filtered and all email addresses are returned within the specified time range.
- **4.** Enter the email addresses that you want to receive notification when the email log request is complete. Separate each email address with a comma.

To clear a request and return to the email log overview page, click **Cancel**.

SEE ALSO:

Use Email Logs to Monitor Emails Sent from Salesforce in Salesforce Classic Email Log Reference

EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: **All** Editions except for **Database.com**

USER PERMISSIONS

To access email logs:

Modify All Data

Email Log Reference

Understand the format and field values of email log files.

The following table describes the format of the log file and lists examples of its fields:

| Column | Field | Description | Example |
|--------|------------------------|---|----------------------|
| A | Date/Time | The date and time the message was sent, in GMT | 3/06/2009 13:37 |
| В | Internal Message ID | The unique internal ID of the message | 16/A4-20983-88E21E84 |
| С | Mail Event | Indicates the final email event in the mail server. Events can be one of the following values: | Τ |
| | | R - Reception The email was successfully received. | |
| | | D - Delivery The email was successfully sent. | |
| | | T - Transient Failure The email transmission was delayed. Salesforce retries delivery over a 24-hour period. The first retry occurs five minutes after the first transient failure, the second occurs ten minutes after that, the third twenty minutes after that, and so on. | |
| | | P - Permanent Failure The email could not be delivered. | |

EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: **All** Editions except for **Database.com**

USER PERMISSIONS

To access email logs:

Modify All Data

| Column | Field | Description | Example |
|--------|-------------------|---|---|
| D | Recipient | The email address of the person to whom the email is sent | admin@acme.com |
| E | Sender | The email address of the person who sent the email | user@acme.com |
| F | Remote Host | The IP address of the application server that delivered the email to the email server | 10.0.0.1 |
| G | Bytes Transferred | The size of the email | 11856 |
| Н | User ID | The Salesforce ID of the user who sent the email | 00540000000rsXT |
| I | Message ID Header | The ID header at the beginning of every email | 21749386. 106091224027705044. JavaMail. sfdc@na2-app4-2-sjl. ops.sfdc.net |
| J | Retry Count | The number of attempts made to deliver the email | 11 |
| K | Seconds in Queue | The number of seconds the email had to wait before being delivered | 300 |
| L | Delivery Stage | The final stage the delivery was in before it was logged. The values of the stages in the order that they appear during the SMTP sequence are: BANNER The SMTP connection response | during RCPT TO |
| | | EHLO The beginning of the session with the mail server | |
| | | STARTTLS Establishes a secure communication session with the email server | |
| | | MAIL FROM Announces the sender of the email | |
| | | RCPT TO Announces the recipient of the email | |

| Column | Field | Description | Example |
|--------|---------------|---|--------------|
| | | DATA Announces that the subsequent text is the email message | |
| | | BODY The state when the body of the email is being sent to the recipient | |
| | | RSET Resets the server state, ending the session | |
| | | In addition, there are responses that can appear at any point during the delivery sequence: | |
| | | while not connected The client is trying to establish a connection | |
| | | while idle The client has connected, but is not sending or receiving any commands | |
| | | reading confirmation A command was sent and the client is waiting for a response | |
| | | handshaking TLS An error occurred while trying to establish a secure connection | |
| | | out of band bounce The receiving server accepted a command, but then for an unknown reason rejected it | |
| | | in unknown state An unknown error has occurred | |
| M | Relay Address | The hostname of the designated relay system | relay.my.org |
| N | Relay Port | The port of the designated relay system | 587 |

| Column | Field | Description | Example |
|--------|---------------------------------|--|----------------------------|
| 0 | Delivery Status Notification | After every delivery stage, a three-digit response code is sent from the mail server. The first number indicates whether the command was successful or unsuccessful; the second digit indicates the type of error; and the third provides additional information to resolve the potential problem. | 421 no adequate servers |
| | | The five possible values of the first digit are: | |
| | | 1xx - Positive Preliminary reply The command was accepted, but no response has been sent | |
| | | 2xx - Positive Completion reply The requested action has successfully completed | |
| | | 3xx - Positive Intermediate reply The command was accepted, but the requested action needs more information | |
| | | 4xx - Transient Negative Completion reply The command was not accepted and the requested action did not occur. However, the error condition is temporary and the action may be requested again. | |
| | | 5xx - Permanent Negative Completion reply The command was not accepted and the requested action did not occur | |
| | | Every email service provider implements the codes differently, so there is no comprehensive list for what the second or third digits indicate. | |

| Column | Field | Description | Example |
|--------|------------|---|---------------------------|
| | | For more information on these codes, view the official SMTP documentation, section 4.2.1: http://www.ietf.org/rfc/rfc2821.txt?number=2821 | |
| P | TLS_Cipher | The encryption of an email that was sent successfully. | TLSv1.2:AES256-GCM-SHA384 |
| | | This information is valid only when Mail Event is set to D - Delivery. | |
| | | The valid entries are: | |
| | | TLS version:cipher The TLS version and cipher | |
| | | : The message wasn't encrypted | |
| | | None The message was used for an internal delivery | |

| Column | Field | Description | Example |
|--------|--------------|--|----------|
| Q | TLS_Verified | If a successfully sent email was encrypted, this value shows whether the encryption certificate was verified against the configured certificate authorities. | Verified |
| | | This information is valid only when Mail Event is set to D - Delivery. | |
| | | The valid entries are: | |
| | | Verified The peer certificate was verified against the configured certificate authorities | |
| | | Unverified The peer certificate wasn't verified against the configured certificate authorities | |

SEE ALSO:

Use Email Logs to Monitor Emails Sent from Salesforce in Salesforce Classic Certificates and Keys

Use Enhanced Email for More Email Functionality

Enhanced Email gives you and your users a ton of email functionality to better drive your business processes, including the ability to relate emails to other records, add custom fields to emails, use triggers with emails, modify the email layout, and manage emails using the Salesforce API. You also get a new and improved email detail page that shows emails in their original format.

With Enhanced Email, emails in Salesforce are saved as EmailMessage records instead of Task records. EmailMessage is a standard Salesforce object, and that's how you get all of these great new email features.



Note: With Enhanced Email, for backwards compatibility, we still create a Task record for each email message. However, when you view emails in Salesforce, you see the Email Message record for the email. That's a good thing, because now emails display in their original format. So, HTML emails show the HTML format, and plain text emails show plain text format. To see the full contents, click the email subject. That's what your users expect.

In the activity timeline, expanded emails are shown as a text-only preview, with paragraphs and line breaks in the same place. To see the full contents, click the email subject.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Considerations for Setting Up Enhanced Email

Before using Enhanced Email, review considerations and limitations related to Email-to-Case customers and working with Email Message and Task records.

- Enhanced Email is automatically enabled for most organizations except ones that use Email-to-Case.
- With Enhanced Email, emails are stored using the standard Salesforce object, EmailMessage. The EmailMessage object gets you all the conveniences that come with standard objects, including custom fields, customized layouts, and a better record detail page.
- If you use Email-to-Case, emails that are associated with cases are already stored by the
 EmailMessage object. You can already use custom fields, customized layouts, workflow rules,
 and triggers with emails without enabling Enhanced Email. If you want to be able to relate
 Email Message records to other objects (besides cases), then we recommend that you enable
 Enhanced Email.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

- With Enhanced Email, emails sent from Salesforce are saved as Email Message records and Task records. However, only the Email Message record is shown on the email detail page.
 - Only the sender can delete the Task and Email Message records. If the sender deletes the task, no one else—including the
 admin—can delete the Email Message record.
 - If you want to save space by removing the email message, the sender has to delete it.
- With Enhanced Email, emails added from Web-to-Lead and Salesforce for Outlook are stored only as Task records. If you use Lightning
 for Outlook, you can store emails as Email Message records by selecting the **Enhanced Email with Lightning for Outlook** option
 on the Lightning for Outlook and Sync setup page.
- You can Reply, Reply All, and Forward emails in the following circumstances.
 - You're listed in the To, Cc or Bcc fields in the email.
 - You're the sender.
 - If you're sending the message via API, the EmailMessageRelationship record exists for you.
 - You can't reply or forward emails logged as tasks.
- You can't use custom currency fields with the EmailMessage object.
- Email Message records can have only one record type.
- Workflow rules can use Email Message records only to update fields on Case records.
- Email is logged as an Email Message record, not an Activity record. Email fields, including RelatedTold, can only be changed when the email is in draft status. The IsExternallyVisible field and custom fields are the exception. This restriction is true for changes made in the UI and through the API.
- You can relate emails to contacts, leads, accounts, opportunities, cases, campaigns, person accounts, and other records. In Salesforce Classic, these related emails are displayed in the Activity History list. In Lightning Experience, they are displayed in the Activity Timeline.
- Before using Enhanced Email, we recommend that you:
 - Replace the workflows for task-based emails with workflows based on the EmailMessage object.
 - Review triggers and workflow rules that use the EmailMessage object.
 - For EmailMessage records associated with cases, the ParentID field is always populated.
 - With Enhanced Email, you can associate Email Message records with other records and the ParentID field may be blank. Update your triggers and workflow rules to handle email messages with a blank ParentID field.
 - Review custom business logic that incorporates tasks and emails. We recommend that you:

- Recreate any custom Task object fields on the EmailMessage object.
- Migrate any Task object triggers to the EmailMessage object.
- Test any workflows and customizations, including Email-to-Case customizations, in a sandbox environment.

SEE ALSO:

Use Enhanced Email for More Email Functionality
Set Up Enhanced Email
Lightning for Outlook with Enhanced Email
Lightning for Gmail with Enhanced Email

Set Up Enhanced Email

Enhanced Email is automatically enabled for most organizations except those that use Email-to-Case.

- 1. From Setup, enter Enhanced Email in the Quick Find box, then select Enhanced Email.
- 2. Click Enable.
- **3.** Update the Email Message page layout to:
 - **a.** Add the Related To field.

 Then, your users can see which records are related to an email.
 - **b.** Remove the Parent Case field from the Email Message page layout. This field is generally blank unless you use Email-to-Case and an email is associated with a case.

SEE ALSO:

Use Enhanced Email for More Email Functionality Considerations for Setting Up Enhanced Email

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To send email:

 Send Email permission and access to the record the email is sent from.

To attach files to email or templates:

Access to the file you're attaching.

To use reply, reply all, and forward

 Read access to the leads and contacts who are email recipients

Send Email Through Email Relay

Use your company's email server to send email from Salesforce. Storing email locally helps you meet compliance goals, and your users can see the emails they've sent from Salesforce in their company email Sent Items folder. Also, routing all email through your own email servers prevents the appearance of email spoofing by Salesforce. Email spoofing is the forging of email headers to make messages appear as if they came from someone other than the original sender.

You can configure your company's email relay service to do these tasks:

- Store copies of all email as required by government regulations in various industries.
- Apply existing content filters that scan messages for data and content that is not approved to be sent out through company email.
- Run outbound email through antivirus software before sending it to customers.
- Append data such as company-wide disclaimers at the bottom of email messages.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Considerations for Setting Up Email Relay

Review a few details before setting up Email Relay, including details about bounce management and spam.

Set Up Email Relay

Set Up an Email Domain Filter

An email domain filter determines whether an email relay is restricted to specific domains. You can create multiple domain filters and set their priority order using the EmailDomainFilter object in the SOAP API.

Considerations for Setting Up Email Relay

Review a few details before setting up Email Relay, including details about bounce management and spam.

Available in: Salesforce Classic and Lightning Experience

Available in: Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

- Email Relay is a good option if:
 - You want to route email sent from Salesforce through your company's mail service. This is helpful for compliance.
 - Your company owns its domain (mycompany.com).
- Salesforce send limits still apply to email relaying.
- Email Relay requires some technical expertise to set up.

Bounce Management with Email Relay

To use Bounce Management, your email server must allow the relaying of email sent from Salesforce with a salesforce.com domain.

Using Email Relay and Bounce Management requires care. It can cause Sender Policy Framework (SPF, a common email security standard) to fail to validate. The Salesforce bounce management feature relies on setting each outgoing email's return path (also called the "envelope from address") to an address at bnc.salesforce.com. SPF works by extracting the domain in the return path to find a set of authorized IP addresses.

When you use Email Relay and Bounce Management, the IP address of your relay doesn't match the authorized IP addresses for the domain (bnc.salesforce.com). This mismatch results in an SPF "soft failure" -- it does not mark your message as invalid, but it may reduce your deliverability.

There are two solutions:

- Establish a DMARC policy for your domain, and then use Salesforce's DKIM signing feature to sign outgoing mail. With this combination, your mail passes a DMARC check, even though it does not pass SPF.
- Turn off bounce management in Salesforce

Deliverability Settings and Email Relay

Once email relay is enabled in Salesforce, companies do not necessarily need all the Salesforce Email Deliverability settings located in Setup. Some of these settings modify the envelope-from address of emails sent from Salesforce. The header From address remains set to the sender's email address. The return-path in the headers is also modified. This change in the email headers may affect email delivery to your email server, as the modified return-path includes a Variable Envelope Return Path value (VERP).

- Example of a standard return-path: <name@domain.com>
- Example of a VERP return-path: <name@domain.com x@x.bnc.salesforce.com>

Disable the following two email deliverability options when using email relay.

- Turn off Enable compliance with standard email security mechanisms
- Consider turning off Activate Bounce Management

After disabling the settings, outbound email sent from Salesforce to your relay server will show both envelope-from and return-path as <name@domain.com>.

Securing Your Email Relay

Follow these suggestions to ensure that your mail relay is secure and that you relay only mail that you intend to:

- Have your relay whitelist only the IPs you want to relay mail for (ours and any others)
- Only relay mail that is sent using your mail domain
- Enforce TLS (optionally set it to TLS required or required and verify the hostname on the certificate)
- Have your relay verify the hostname on our certificate
- Look for a header X-SFDC-LK and ensure that it has your orgid in it. Only relay mail from salesforce if it has the proper orgid
- Use DKIM signing in salesforce and only relay mail if the DKIM signature passes

Set Up Email Relay

You can set up an email relay for Salesforce-generated email by configuring Salesforce to automatically route email through your company's Simple Mail Transfer Protocol (SMTP) server. If your company sends email from more than one email domain, you can configure an email relay for each domain.

To activate the multiple email relay feature:

- 1. From Setup, enter *Email Relay Activation* in the Quick Find box, and select **Email Relay Activation**.
- **2.** Select **Try it now**. If you have an existing email relay, your host information is preserved when you activate the multiple email relay feature.

To set up an email relay:

- 1. From Setup, enter *Email Relays* in the Quick Find box, and select **Email Relays**.
- 2. Select Create Email Relay.
- **3.** Configure the following settings.

| Setting | Description | | |
|-------------|--|--|--|
| Email Host | The host name or IP address of your company's SMTP server. Obtain this information from your email administrator. | | |
| | (1) Important: If you plan to use Transport Layer Security (TLS) with this connection, enter the host name instead of the IP address. TLS requires the host name for verifying certificates. | | |
| | For host names, use the following format: | | |
| | <pre><mail server="">.<domain>.<domain extension=""></domain></domain></mail></pre> | | |
| | For example: | | |
| | mail.acme.com | | |
| Port | The port number of your company's SMTP server. Obtain this information from your email administrator. Email relaying is supported on port numbers 25, 587, 10025, and 11025. | | |
| TLS Setting | Specifies whether Salesforce uses TLS for SMTP sessions. Select one of the following options | | |
| | Off—TLS is turned off. SMTP session continues through an insecure connection. | | |
| | Preferred—If the remote server supports TLS, Salesforce upgrades the current SMTP session to use TLS. If TLS is unavailable, | | |

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To configure email relay:

 Email Administration, Customize Application, and View Setup

Setting Description

Salesforce continues the session without TLS.

- Required—Salesforce continues the session only if the remote server supports TLS. If TLS is unavailable, Salesforce terminates the session without delivering the email.
- Preferred Verify—If the remote server supports TLS,
 Salesforce upgrades the current SMTP session to use TLS.
 Before the session begins, Salesforce verifies that a valid
 certificate authority has signed the certificate, and that the
 common name presented in the certificate matches the
 domain or mail exchange of the current connection. If TLS
 is available but the certificate is not signed or the common
 name does not match, Salesforce disconnects the session
 and does not deliver the email. If TLS is unavailable, Salesforce
 continues the session without TLS.
- Required Verify— Salesforce continues the session only if
 the remote server supports TLS, a valid certificate authority
 has signed the certificate, and the common name presented
 in the certificate matches the domain or mail exchange to
 which Salesforce is connected. If any of these criteria are not
 met, Salesforce terminates the session without delivering
 the email.

- 4. Save the page.
- 5. Set up an email domain filter.

Salesforce recommends sending a test message each time you change the email relay configuration.

Tip: If you plan to activate bounce management and email compliance management, confirm with your email admin that your company allows relaying email sent from Salesforce. For more information on bounce management, see Guidelines for Configuring Deliverability Settings for Emails Sent from Salesforce on page 236.

SEE ALSO:

Test the Deliverability of Emails Sent Through Salesforce
Enabling Compliance BCC Emails

Guidelines for Configuring Deliverability Settings for Emails Sent from Salesforce

Organization-Wide Email Addresses

Set Up an Email Domain Filter

An email domain filter determines whether an email relay is restricted to specific domains. You can create multiple domain filters and set their priority order using the EmailDomainFilter object in the SOAP API

- 1. Activate the multiple email relay feature, if you haven't already.
- From Setup, enter Email Domain Filters in the Quick Find box, and select Email Domain Filters.
- 3. Select Create Email Domain Filter.
- **4.** Configure the following settings.

| Setting | Description |
|------------------|--|
| Sender Domain | Restricts the email relay to send emails based on the listed sender domains. This field accepts comma-separated values and supports the wildcard character (*). The default is *. |
| Recipient Domain | Restricts the email relay to send emails based on the listed recipient domains. This field accepts comma-separated values and supports the wildcard character (*). The default is *. |
| Email Relay | Specifies the relay host for the domain filter. |
| Active | Enables or disables the domain filter. |

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To configure an email domain filter:

Email Administration,
 Customize Application,
 and View Setup

5. Save the page.



Note: The wildcard character (*) must precede a second-level domain name. For example, *.example.com includes all subdomains of example.com.

If you plan to activate bounce management and email compliance management, confirm with your email admin that your company allows relaying email sent from Salesforce. For more information on bounce management, see Guidelines for Configuring Deliverability Settings for Emails Sent from Salesforce on page 236

Email Editions and Permissions in Lightning Experience

Salesforce email and email templates are available in several editions. Enable features and manage permissions and access at the organization level and for administrators and end users.

| Organization Level | Permissions and Access Requirements | | |
|------------------------------------|--|--|--|
| Use Email in Lightning Experience: | Lightning Experience enabled. Send Email action added to the Salesforce Mobile and Lightning Experience Actions | | |

EDITIONS

Available in: Salesforce Lightning Experience

Available in: Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions

| Organization Level | Permissions and Access Requirements |
|-----------------------------------|--|
| | section on page layouts for objects that support Lightning Email. |
| Send all types of outbound email: | Access to Send Email access level set to All email. |
| Send attachments: | Content Deliveries enabled to upload files larger than 3 MB. If Content Delivery is not enabled, users cannot upload files larger than 3 MB. Salesforce Files enabled to send files. If Salesforce Files is not enabled, you can only send attachments. |
| View sent emails: | When Enhanced Email is on: No additional permissions are required. Emails appear as email records. When Enhanced Email is off: Emails appear as task records. We recommend enabling Shared Activities. If Shared Activities is not enabled and a user sends email to multiple contacts, Salesforce creates duplicate closed task records—one for each contacts. |

| Administrator | Permissions and Access Requirements |
|--|--|
| Create an email template: | Send Email permission. |
| Attach a file to a template or email: | Access to the file you're attaching. |
| Delete a template created by someone else: | View All Data permission. |
| Send email: | Before sending email for the first time, all administrators must verify their email addresses. Just follow the prompt. |

| User | Preferences and Permissions Required |
|---|--------------------------------------|
| Create an email template: | Send Email permission. |
| Add merge fields to a template or email: Access to the fields on the applicable object. | |
| Attach a file to a template or email: | Access to the file you're attaching. |
| Delete a template you created: | None. |
| Send email: | Send Email permission. |

| User | Preferences and Permissions Required | |
|------|--|--|
| | • Before sending email for the first time, all administrators and users must verify their email addresses. Just follow the prompt. | |

SEE ALSO:

Which Option for Sending Email from Salesforce Is Best for Your Organization?

Email and Email Template Allocations per Edition

See the allocations for email and email templates per edition.

Using the API or Apex, you can send single emails to a maximum of 5,000 external email addresses per day based on Greenwich Mean Time (GMT). Single emails sent using the email author or composer in Salesforce don't count toward this limit. There's no limit on sending individual emails to contacts, leads, person accounts, and users in your org directly from account, contact, lead, opportunity, case, campaign, or custom object pages.

| Feature | Personal Edition | Contact Manager | Group Edition | Professional Edition | Enterprise Edition | Unlimited and Performance Edition | Developer Edition |
|--|--|--------------------|------------------------------------|--|-----------------------|-----------------------------------|----------------------|
| Email templates: maximum size | 384 KB for text email templates | | r text, HTML, a Visualforce tem | nd custom HTM nplates | L templates | | |
| Email services: maximum email messages processed by Salesforce per day | | | | Number of user licenses multiplied by 1,000; maximum 1,000,000 | | | |
| Email services: maximum size of email message (email headers, body, attachments, and encoding) | N/A | | | 25 MB ¹ | | | |
| Extended mail merge: maximum records | 1,000 | | | | | | |
| Extended mail merge: maximum total size of selected templates | 1 MB | | | | | | |
| Inbound email sent to Salesforce | Email body truncation size: 32 KB Maximum email activities created for each email received: 50 Total maximum size of file attachments: 25 MB¹ | | | | | | |
| Merge field: Case.Email_Thread | N/A | | | n emails: 200 dy truncation siz | re: 32 KB | | |

| Feature | Personal Edition | Contact Manager | Group Edition | Professional Edition | Enterprise Edition | Unlimited and Performance Edition | Developer Edition |
|--|---------------------|--------------------|------------------|-------------------------|-----------------------|--|----------------------|
| On-Demand Email-to-Case: maximum email messages processed by Salesforce per day (counts toward limit for email services) | N/A | | | Number of us 1,000,000 | er licenses mul | tiplied by 1,000 | l; maximum |
| On-Demand Email-to-Case: maximum email size (email headers, body, attachments, and encoding) | | | | 25 MB ¹ | | | |

¹ The maximum size of email messages for email services varies depending on language and character set. The size of an email message includes the email headers, body, attachments, and encoding. As a result, an email with a 25 MB attachment likely exceeds the 25 MB size limit for an email message after accounting for the headers, body, and encoding.

Manage Email in Lightning Experience

If you're using Lightning Experience, you can email contacts, leads, and your own colleagues directly from account, person account, contact, lead, opportunity, campaign, and case records you have access to. You can send an email to any valid email address, and attach files to your emails.

Access and Sharing for Email Merge Fields, Templates, and Attachments in Lightning Experience

Using integrated email in Lightning Experience? It's important to understand how access and sharing work for merge fields, templates, and attachments.

Send Email from a Record in Lightning Experience

Send rich-text email, including attachments, directly from the record you're on. Send to customers, colleagues, or any valid email address.

Find Email Sent from a Salesforce Record in Lightning Experience

After you send an email, Salesforce creates an email record to track the email and store its content. The activity feed includes a link to that email. If you sent email to a contact or lead, each of those records includes a link to the email.

Use the Email Action in Lightning Experience

In Spring '17, the Lightning Email Composer was replaced with the Email action. This new action allows greater customization, such as adding and removing fields or specifying predefined values. The action also supports all objects which have activities enabled, and can be invoked from anywhere in Lightning Experience.

EDITIONS

Available in: Lightning Experience

Available in: Essentials, Professional, Enterprise, Performance, Unlimited, and Developer editions

Access and Sharing for Email Merge Fields, Templates, and Attachments in Lightning Experience

Using integrated email in Lightning Experience? It's important to understand how access and sharing work for merge fields, templates, and attachments.

Merge Field Availability

Nearly all standard and custom fields are available as merge fields.

- Fields about the related record, such as Account, Contact, Opportunity, Lead, Campaign, Case, User, and custom objects
- Fields about the primary recipient, such as lead, contact, or user



Note: In Lightning Experience, you can use person account merge fields. Use the format {{{Account.field}}}

In Salesforce Classic, use the format {!Account.<field>}.

Some fields aren't available to individual users because of field-level security settings.

Templates

- In Lightning Experience, you can use email templates created in Salesforce Classic: Text, Custom HTML, HTML with Letterhead, and Visualforce email templates. Email templates created in Lightning Experience can't be used in Salesforce Classic.
- Lightning email templates with the Related To field set to Account, Opportunity, and other standard or custom objects are available for that object only. Global email templates, with a blank Related To field or a Related To set to Lead or Contact, can be used from any record.
- Email templates you create in Lightning Experience are automatically public: they're available for use by others in your organization.

Attachments

Salesforce Files and Content Deliveries must be enabled before you can select and attach files from Salesforce Files. If these features are not enabled, you can only upload attachments, not select files from Salesforce Files.



Note: When you upload a file, it becomes part of Salesforce Files.

- If you don't have access to a file, you can't attach it to an email or a template. We let you know if you need access, so you can ask the file's owner.
- You can customize whether to send files as links or attachments, depending on the total size of all attached files. From Setup, enter Email Attachments in the Quick Find box, then select Email Attachments under Email.
 - If the combined size of all files attached to an email exceeds the Salesforce limit, 3 MB, or if you use list email, the actual files are not attached to the email when it's sent. Instead, a link to each file is attached to the email. When a recipient clicks a link, it opens the corresponding attachment in Salesforce Files. For example, if you attach two 1.7-MB files to an email and send it, the recipient receives the email with two links attached to it.



Note: Email attachments sent as a link become publicly accessible. Public access allows anyone with the link to view, share, and download the file.

- Attachments that are sent as links in Salesforce Classic expire after 30 days. You can expire the link manually.
- Attachments that are sent as links in Lightning Experience don't expire automatically. You can expire the link manually.
- When forwarding emails, the most recent version of the file is attached, not the version sent in the original email.
- Email attachments sent in Salesforce Classic can't be forwarded in Lightning Experience.

EDITIONS

Available in: Salesforce Lightning Experience

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

 A file can be shared a maximum of 100 times. This count includes shares with records, people, and groups. If a file is approaching the maximum number of shares, consider creating a public link or making the file public by posting it to your feed.

SEE ALSO:

Add Images and Files to Email Messages in the Salesforce Classic Case Feed Use Your Classic Email Templates in Lightning Experience Email Editions and Permissions in Lightning Experience Share Files via Link

Send Email from a Record in Lightning Experience

Send rich-text email, including attachments, directly from the record you're on. Send to customers, colleagues, or any valid email address.

Email is available for a number of items, including accounts, person accounts, contacts, leads, opportunities, campaigns, and cases.



Note: If your company doesn't have Enhanced Email enabled, Salesforce creates a task record instead of the email record. If you're unsure whether you have Enhanced Email enabled, talk to your administrator.

To attach files to an email or use a template with attached files, you need file access. If you don't have access, we'll let you know.

- 1. Open the record from which you want to send the email.
- 2. Click the Activity tab and then click Email.



Tip: If you prefer to compose from a window, click the arrow button to pop out your email. While the composer window is active, you can scroll the record page to view details and other information or navigate anywhere else in Salesforce.

- 3. Write your email. If the recipient has opted out of receiving mass email or previous emails to the address have bounced, you'll see an indicator next to their name.
- **4.** Add attachments if you need to.

To add multiple attachments from your computer, drag the files into the body of the email.

5. Preview and send.

You'll find a link to the email in the activity feed under Past Activity. You can also find a link in the activity timeline on related records. If you use Automatic BCC, as defined in your email settings, you'll receive a copy of the email in the inbox of your specified return address.



Example: Jane is working a deal, or opportunity, to sell 600 widgets to Acme Corporation. The contact for Acme is John Stamos and the opportunity record is Acme 600 Widgets. Jane needs to send an email to John, including a term sheet, and she wants that email associated with the 600 widgets opportunity record. It's also handy to have the email available from John's contact record. Jane opens the Acme 600 Widgets record and writes the email, attaching the term sheet. After she sends the email, she can find a link to the email on the Acme 600 Widget opportunity record and the John Stamos contact record.

SEE ALSO:

Edit Your Email Settings

EDITIONS

Available in: Lightning Experience

Available in: Essentials. Professional, Enterprise, Performance, Unlimited, and **Developer** Editions

USER PERMISSIONS

To send email:

Send Email permission and access to the record the email is sent from.

To attach files to email or templates:

Access to the file you're attaching.

Find Email Sent from a Salesforce Record in Lightning Experience

After you send an email, Salesforce creates an email record to track the email and store its content. The activity feed includes a link to that email. If you sent email to a contact or lead, each of those records includes a link to the email.

For emails that *don't* include any contact or lead records as recipients in the To field, the email and the feed item are created for the record specified in the Related To field when you sent the email.

If you use Automatic BCC, as defined in your email settings, you receive a copy of the email in the inbox of your specified return address.



Note: If your company does not have Enhanced Email enabled, Salesforce saves sent emails as task records instead of email records. You find the task records the same way you would find email records. If you are unsure of whether your company uses Enhanced Email, speak with your administrator.

- 1. Open either the record that was originally open when you wrote the email or the record for the contact or lead you sent it to.
- **2.** To find the email in Past Activity, click the Activity tab.
- **3.** To open its task record, where you can view the message and related details, click the email link. And if you use Automatic BCC, you can find the sent email in your inbox.

EDITIONS

Available in: Salesforce Lightning Experience

Available in: Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To view sent email:

 View Tasks permission and access to the record the email was sent from.

Use the Email Action in Lightning Experience

In Spring '17, the Lightning Email Composer was replaced with the Email action. This new action allows greater customization, such as adding and removing fields or specifying predefined values. The action also supports all objects which have activities enabled, and can be invoked from anywhere in Lightning Experience.

Which Email Action Are You Using?

In Spring '17, the Lightning Email Composer was replaced with the Email action. Existing actions were upgraded automatically for most orgs. However, to respect org customizations, the Lightning Email Composer was not replaced on orgs with heavily customized page layouts.

Email Action Considerations

Before working with the Email action, be aware of these limitations.

Troubleshoot the Email Action

If you're having trouble with the Email action, review these tips.

Confirm That Global Layouts Are Using the Correct Email Action

Although the Email action is only available in Lightning Experience, it must be in the Quick Actions in the Salesforce Classic Publisher section of the page layout so that the action is available in every layout that inherits from the global layout. The action must also be in the global layout to enable Email in the Global actions menu, use reply/forward, use email in Assistant, and use email in Opportunity Insights.

Confirm That Record Layouts Are Using the Correct Email Action

Confirm that the "Send Email" action is in the appropriate section of each record layout.

Create an Email Action in Lightning Experience

Include the Email action on layouts to make emailing more convenient.

EDITIONS

Available in: Lightning Experience

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

Fields Available on the Email Ouick Action

After you create an Email quick action, you can customize the fields displayed for the action. Drag fields from the Email Message Fields palette to the email layout.

Which Email Action Are You Using?

In Spring '17, the Lightning Email Composer was replaced with the Email action. Existing actions were upgraded automatically for most orgs. However, to respect org customizations, the Lightning Email Composer was not replaced on orgs with heavily customized page layouts.

When is the action replaced automatically?

The previous email composer (the **Send an Email** standard button) is automatically replaced with the new Email action in these cases:

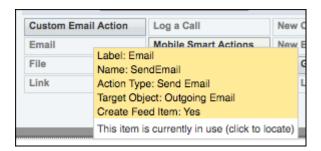
- If the the Global layouts are unchanged
- If the Account, Opportunity, Lead, Contact, and Campaign layouts had the email composer.

When isn't the previous email composer automatically replaced?

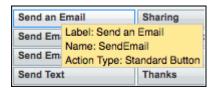
- If a quick action with the API name SendEmail exists
- If the previous email composer isn't on the Account, Opportunity, Lead, Contact, or Campaign layouts
- If the quick action isn't on the Global layout

To see which action you're using:

- 1. Click Setup.
- 2. In the "Quick Find" field, enter Global Actions, then click Global Actions.
- 3. Examine the Email actions and confirm that the new action (with label of "Email", name of "SendEmail", and type of "Send Email") is listed
 - The new action is labeled Email, with the same name of SendEmail and an action type of Send Email.



The old action is labeled Send an Email, with the name SendEmail and an action type of Standard Button.



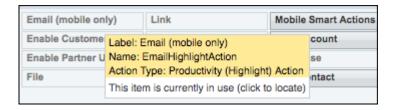


Available in: Lightning Experience

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



Note: The Email Action for the Salesforce mobile app, EmailHighlightAction, is now called Email (mobile only). It displays only on mobile layouts.



SEE ALSO:

Troubleshoot the Email Action

Email Action Considerations

Before working with the Email action, be aware of these limitations.

- You can't add custom fields or rename existing fields in the Email action.
- The From field is required.
 - Note: If the From field is not in the Email action layout, it must be predefined.
- HTML Body content is required; Text Body content is only supported on the Case-specific Email
 action.
 - Note: If the HTML Body field is not in the Email action layout, it must be predefined.
- The Related To field cannot be set to Cases in the global Email action.
- The **Send an Email** mobile action is not supported on cases.

Predefined Values

- Emails sent with only email addresses specified aren't associated with Salesforce records. Send emails to the Salesforce contact, lead, or person account record instead.
- Related To can be predefined only for an entity-specific quick action, not a global quick action.
- Predefined values aren't supported in Reply/Forward or emails initiated from Assistant or Opportunity Insights.
- Predefined values are supported in an inline Email action on a record and in an Email action on the Global Actions menu.
- If Compliance Bcc is enabled, predefined values for the Bcc field are ignored. If Auto Bcc is enabled, predefined values for the Bcc field are appended to the Auto Bcc address.

Reply/Forward and Email in Opportunity Insights

Reply/Forward and email functionality depends on the following criteria:

- The global Email action is on the Global layout, in the Salesforce1 and Lightning Experience Actions section.
- Either the Subject or Body field must be on the layout.
- The user has the Send Email permission.
- The Org-wide Preference "Access to Send Email" is set to All Emails.



Troubleshoot the Email Action

If you're having trouble with the Email action, review these tips.

- The new email action wasn't set up properly if:
 - You don't see the Email action in the Global Actions menu.
 - You don't see the Email action in the Activity Publisher of objects where you need email capability.
 - You're missing reply/forward actions on an email activity.
- When you add the Email action to the Global layout, it appears in the Global Actions menu (the
 + button in the upper right) and in the Activity Publisher for all objects that inherit from the
 Global layout.
- Either the Global or the object-specific Email action can be added directly to the actions section on the layout of any activity-enabled object.

Object-specific email actions can only be added to the layout for that object. For example, an account-specific email action can be added only to the account page layout.

- If the Email action is not displayed on an object, confirm that the object is activity-enabled.
- Emails sent from the Email action use the character encoding specified in the user settings.
- To see the Email tab in the activity composer, set Email Deliverability to All Email.

SEE ALSO:

Which Email Action Are You Using?

Confirm That Global Layouts Are Using the Correct Email Action

Although the Email action is only available in Lightning Experience, it must be in the Quick Actions in the Salesforce Classic Publisher section of the page layout so that the action is available in every layout that inherits from the global layout. The action must also be in the global layout to enable Email in the Global actions menu, use reply/forward, use email in Assistant, and use email in Opportunity Insights.



Note: The **Send an Email** mobile action is not supported on cases.

- 1. Click Setup.
- 2. In the "Quick Find" field, enter Publisher Actions, then click **Publisher Actions**.
- 3. Confirm that the Email action exists on every global layout.
 - **a.** In the Quick Actions in the Salesforce Classic Publisher section, confirm that the Email action (with label of "Email", name of "SendEmail", and Action Type of "Send Email") is listed.
 - **b.** If the Salesforce1 and Lightning Experience Actions section is not using the predefined actions, confirm that the Email action (with label of "Email", name of "SendEmail", and Action Type of "Quick Action") is listed.

SEE ALSO:

Confirm That Record Layouts Are Using the Correct Email Action

EDITIONS

Available in: Lightning Experience

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

n the layout of any activity-enabled

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To create and modify the Email quick action:

Customize Application

To edit a page layout:

Customize Application

Confirm That Record Layouts Are Using the Correct Email Action

Confirm that the "Send Email" action is in the appropriate section of each record layout.

For each record layout page, ensure that the Email action is in the appropriate section. The correct section depends on whether the "Quick Actions in the Salesforce Classic Publisher" and "Salesforce1 and Lightning Actions" sections are inherited or overwritten.

- 1. Click Setup.
- 2. In the "Quick Find" field, enter Object Manager, then click **Object Manager**.
- 3. Click Account.
- **4.** For each Account page layout, use the table to determine which section should have the Email action
- **5.** Repeat these steps for Opportunity, Lead, Contact, and Campaign layouts, and any activity-enabled objects which should have email capability.

Example:

| | | Quick Actions in the Salesforce Classic Publisher | | |
|--------------------------------------|-------------|---|--|--|
| | | Inherited | Overwritten | |
| Salesforce1 and Lightning Actions | Predefined | Ensure that the Global layout is set up according to the instructions in the "Global Layout" section. Ensure that action in the "Quick Action in the Salesforce Classic Publisher section. | | |
| | Overwritten | Ensure that action is in the "Salesforce1 and Lightning Experience Actions" section. | Ensure that action is in the "Salesforce1 and Lightning Experience Actions" section. | |

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To create and modify the Email quick action:

Customize Application

To edit a page layout:

Customize Application

Ø

Note: For records in the activity timeline, the Email action displays in the Activity Publisher.

SEE ALSO:

Confirm That Global Layouts Are Using the Correct Email Action

Create an Email Action in Lightning Experience

Include the Email action on layouts to make emailing more convenient.

If you don't have an email action already, you can create one. If you already have an email action, you might want to create another one for business process reasons.

For example, your company sends an email to every lead who's attended a product demo. So, you want one email action for generic emails, and another with a predefined subject and body that automatically uses the current record for the To email address.

For the follow-up email sent to leads, the subject says "Thanks for attending the demo" and the body offers them a coupon on any future purchases. By putting this info in an email action, it's easier for your reps to send these emails, with a consistent message and formatting.



Note: The **Send an Email** mobile action is not supported on cases.

- 1. Click Setup.
- 2. In the "Quick Find" field, enter Global Actions, then click Global Actions.
- **3.** Click **New Action**, then specify:
 - a. Action Type Send Email
 - **b.** Standard Label Type Email
 - c. Name SendEmail (or something similar)
- 4. Click Save.
- 5. On the layout editor, accept the default layout, and click Save.
- **6.** Confirm global and record layouts are using the action.

SEE ALSO:

Confirm That Global Layouts Are Using the Correct Email Action Confirm That Record Layouts Are Using the Correct Email Action Fields Available on the Email Ouick Action

Fields Available on the Email Quick Action

After you create an Email quick action, you can customize the fields displayed for the action. Drag fields from the Email Message Fields palette to the email layout.

Table 7: Fields Available on the Email Quick Action

| Field | Description |
|-------------|--|
| Blank Space | Adds empty space to the email layout. This field can be used multiple times within the email layout. |
| BCC | Email header field where sales reps can enter BCC addresses. If BCC Address is added to an email layout that includes the To Address field, the BCC Address field is collapsed and appears as a link in the email layout. When an sales rep clicks the BCC link, the field expands and doesn't collapse again. If the |

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To create and modify the Email quick action:

Customize Application

To edit a page layout:

Customize Application

EDITIONS

Available in: Lightning Experience

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

| Field | Description |
|------------|--|
| | field is required, a red line appears next to it and the field is always expanded. You can only predefine this field to an email address. You can predefine it using either BCC (used to define email addresses) or BCC Recipients (used to define contact, lead, and user IDs). |
| CC | Email header field where sales reps can enter CC addresses. If CC Address is added to an email layout that includes the To Address field, the CC Address field is collapsed and appears as a link in the email layout on the case page layout. When a rep clicks the CC link, the field expands and doesn't collapse again. If the field is required, a red line appears next to it and the field is always expanded. You can only predefine this field to an email address. You can predefine it using either CC (used to define email addresses) or CC Recipients (used to define contact, lead, and user IDs). |
| From | Email header field where sales reps can enter a From email address from a picklist (dropdown list). Reps can select from org-wide email addresses and the user's own email address. The From picklist is added by default in the Send Email action in new orgs created in Winter '17 or later. If you create a Send Email action after Winter '17, then the From picklist is added to the email layout by default. |
| HTML Body | Email body field that supports HTML formatting and images. |
| Related To | Field for the record ID of related objects, such as accounts, opportunities, campaigns, cases, or custom objects. For more information, see EmailMessage in the API Guide. |
| Subject | Email header field where users can enter a subject. |
| То | Email header field where users can enter To email addresses. You can only predefine this field to an email address. You can predefine it using either T (used to define email addresses) or To Recipients (used to define contact, lead, and user IDs). |

SEE ALSO:

Create an Email Action in Lightning Experience

Manage Email in Salesforce Classic

If you're using Salesforce Classic, use Email Author to email your contacts, leads, person accounts, and coworkers directly from account, contact, lead, opportunity, case, campaign, or custom object pages.

Send Email in Salesforce Classic

Email your contacts, leads, person accounts, and coworkers directly from account, contact, lead, opportunity, case, campaign, or custom object pages in Salesforce Classic.

Delete Email Attachments Sent as Links in Salesforce Classic

When you add an attachment to an email, you can send the attachment as a link instead of sending the entire file. You can stop the person who got the email from opening the linked attachment.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: **All** Editions

Mass email not available in: **Personal, Contact Manager**, and **Group**Editions

Considerations for Sending Email in Salesforce Classic

Before you send email, consider a few key points.

General

- You can enter only one name in the To field.
- You can include a signature in text emails only.

EDITIONS

Available in: Salesforce Classic

Available in: All Editions

Email Templates

- When authoring an email, you can choose a predefined template for the message. To personalize your message, you can include merge fields that are replaced with information from the Salesforce record when the email is sent. For example, your company can use a standard template to communicate solution information to customers with cases. Your Salesforce admin can maintain company-wide templates, and you can maintain your own templates.
- Email templates give you access only to the fields that are accessible to you via your page layout and field-level security settings. (Field-level security is available in Professional, Enterprise, Unlimited, Performance, and Developer Editions.)
- If your template contains a merge field for which no data exists in a particular record, that field doesn't appear in the email that you send. To find such blank fields, modify your recipient list view to search for the merge fields that you're using in your template. Then enter the criterion "<field> equals," leaving the third field blank. Edit those records that have blank fields before you send email.
- If you modify an email template, your changes affect the HTML version of the template.
- You can't modify custom email templates.

Tracking Email

To track email that you sent, use HTML formatting when authoring. Also make sure that your Salesforce admin has added the HTML Email Status related list to your contact, lead, and person account pages.

Send Email in Salesforce Classic

Email your contacts, leads, person accounts, and coworkers directly from account, contact, lead, opportunity, case, campaign, or custom object pages in Salesforce Classic.

- 1. On the Activity History related list of a record, click **Send an Email**.
- 2. To change formatting type, click **Switch to Text-Only** or **Switch to HTML**.
- 3. To use a predefined email template, click **Select Template**.
- **4.** Complete the fields.
- 5. Click Send.



Note: When you send an email to a Contact or Lead through the Send an Email composer, it checks recipients' email opt-out preference. If any recipients have opted out, you see a warning banner. When you enter an email address into the **Additional To, CC**, or **BCC** field, the composer doesn't check the email opt-out preference and no warnings are shown.

SEE ALSO:

Considerations for Sending Email in Salesforce Classic Guidelines for Working with Email Send Mass Email in Salesforce Classic

Delete Email Attachments Sent as Links in Salesforce Classic

When you add an attachment to an email, you can send the attachment as a link instead of sending the entire file. You can stop the person who got the email from opening the linked attachment.

You can find and delete attachments sent as links. Recipients who then click the attachment link see a message asking them to contact the email sender to view the attachment. You can search only within your organization's email retention period. This period is typically 30 days, but contact Salesforce Support for your organization's details.

To find and delete email attachments sent as links:

- From Setup, enter Attachments in the Quick Find box, then select Delete
 Attachments Sent as Links.
- 2. Enter either of the following options.
 - File name (optional), username, and date range:
 - Optionally, attachment file name, including the file extension (for example,
 ThisYearResults.pdf). You can use wildcards (for example, ThisYearRes would find ThisYearResults.pdf).
 - Sender's username
 - Date range during which the email was sent
 - Attachment URL: Click the attachment link (.html) in the email to open it in a browser, and copy and paste the URL.

3. Click Search.

- Search results show up to 100 matching entries.
- If the attachment was sent using mass email, search results show one entry for every 100 emails sent. Delete one of these entries to delete the attachment.

EDITIONS

Available in: Salesforce Classic

Available in: All Editions

USER PERMISSIONS

To send email:

Send Email

EDITIONS

Available in: Salesforce Classic

Available in: All Editions

USER PERMISSIONS

To delete email attachments sent as links:

Modify All Data

- **4.** In Search Results, click **Del** next to the attachment you want to delete. Recipients who then click the attachment link see a message asking them to contact the email sender to view the attachment.
 - Note: You cannot recover deleted attachments from the Recycle Bin.

Manage the Admin Details of Email

Several options for using email, such as organization-wide email address, are set up by an admin for users.

Organization-Wide Email Addresses

If your Salesforce org requires users to share a common email alias, you can define a list of organization-wide addresses for each user profile. When sending email from Salesforce, users with these profiles can select their own email address or the organization-wide email address for the email's From field. Replies are delivered to the selected address.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: All Editions

Organization-Wide Email Footers

Let your users save time and apply common messaging to all emails sent from Salesforce by creating organization-wide email footers. You can create a separate email footer for each encoding and choose default email footers for single emails, mass email, and list email. In Lightning Experience, email sent via Gmail or Office 365 can contain an organization-wide email footer: you choose if it's included.

Enable Email Tracking for HTML-Based Emails

Enable Salesforce to track outbound HTML emails: Custom HTML and Letterhead.

Troubleshoot Inbound Email Errors with Snapshots

Take a snapshot of inbound email messages so you can more easily troubleshoot inbound email errors.

Guidelines for Working with Email

Consider a few pieces of advice for working with emails, including information for customers that use Email-to-Case and Enhanced

Organization-Wide Email Addresses

If your Salesforce org requires users to share a common email alias, you can define a list of organization-wide addresses for each user profile. When sending email from Salesforce, users with these profiles can select their own email address or the organization-wide email address for the email's From field. Replies are delivered to the selected address.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: All Editions



Example: Your org has several users assigned to a Support Profile. This profile is associated with an email address called support@acme.com and a Display Name of Acme Support. When these users send an outbound email through Salesforce, they can choose to have their From email address appear as support@acme.com instead of their own Salesforce email address.

The highlighted sections in the following image represents the changes to the From address and Display Name that the recipient of an email might see.

Date: Wed, 22 Apr 2009 18:44:19 +0000 From: Acme Support <support@acme.com> Sender: <no-reply@salesforce.com> To: "friend@xyz.com" <friend@xyz.com>

Message-ID: <21746402.461240425859813.JavaMail.sfdc@na1-app1-12-sfm.ops.sfdc.net>

Subject: Here is your data

Considerations for Using Organization-Wide Email Addresses

Before creating and assigning organization-wide addresses to your Salesforce user profiles, review a few details, including information about mass email and reporting.

Set Up Organization-Wide Email Addresses

You can define and manage organization-wide addresses for each user profile. When sending email from Salesforce, users with these profiles can select their own address or the organization-wide address for the email's From address. Replies are delivered to selected address.

SEE ALSO:

Send Email from Salesforce

Organization-Wide Email Footers

Considerations for Using Organization-Wide Email Addresses

Before creating and assigning organization-wide addresses to your Salesforce user profiles, review a few details, including information about mass email and reporting.

Available in: Lightning Experience and Salesforce Classic

Available in: All Editions

- Organization-wide addresses can't be used in scheduled reports, scheduling dashboards for refresh, sending mail merge emails, mass email, list email, and sending meeting requests to contacts and leads.
- You can't delete or change an organization-wide email address if it's used by an email alert.

SEE ALSO:

Organization-Wide Email Addresses

Set Up Organization-Wide Email Addresses

You can define and manage organization-wide addresses for each user profile. When sending email from Salesforce, users with these profiles can select their own address or the organization-wide address for the email's From address. Replies are delivered to selected address.

Available in: Lightning Experience and Salesforce Classic

Available in: All Editions

USER PERMISSIONS

To modify organization-wide addresses:

Modify All Data

- 1. From Setup, enter Organization-Wide Addresses in the Quick Find box, then select Organization-Wide Addresses.
- 2. To manage organization-wide addresses, use the available options.

To use an organization-wide address, send an email from Salesforce and choose your organization-wide address from the dropdown list.

SEE ALSO:

Organization-Wide Email Addresses

Considerations for Using Organization-Wide Email Addresses

Organization-Wide Email Footers

Let your users save time and apply common messaging to all emails sent from Salesforce by creating organization-wide email footers. You can create a separate email footer for each encoding and choose default email footers for single emails, mass email, and list email. In Lightning Experience, email sent via Gmail or Office 365 can contain an organization-wide email footer: you choose if it's included.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: All Editions

Considerations for Setting Up Organization-Wide Email Footers

Before creating organization-wide footers for users in your Salesforce org, review a few details, including information about encoding and defaults.

Set Up Organization-Wide Email Footers

With organization-wide email footers, you can apply common messaging to all emails sent from Salesforce. In just a few clicks, you can create, edit, and deactivate footers, and set default footers.

SEE ALSO:

Send Email from Salesforce

Considerations for Setting Up Organization-Wide Email Footers

Before creating organization-wide footers for users in your Salesforce org, review a few details, including information about encoding and defaults.

- Footers are text only. HTML tags aren't rendered.
- If your organization uses Send Through Gmail or Office 365, organization-wide footers do not appear in emails sent from Salesforce.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: All Editions

- You can choose one default footer for single email and one for mass email or list email. These defaults are used when no footer matches an outgoing email's encoding.
- The maximum size of a footer is 32 KB.
- Encoding
 - In Lightning Experience, the footers are sent in the user's encoding setting.
 - In Salesforce Classic, the Email encoding field lets you determine which emails the footer appears on. For each encoding, you can have one active single email footer and one active mass email footer.

SEE ALSO:

Organization-Wide Email Footers

Set Up Organization-Wide Email Footers

With organization-wide email footers, you can apply common messaging to all emails sent from Salesforce. In just a few clicks, you can create, edit, and deactivate footers, and set default footers.

- 1. From Setup, enter *Email Footers* in the Quick Find box, then select **Email Footers**.
- **2.** To create, edit, and deactivate footers; set default footers; and deactivate organization-wide email footers, use the available options.

SEE ALSO:

Organization-Wide Email Footers

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: All Editions

USER PERMISSIONS

To create and edit email footers:

Modify All Data

Enable Email Tracking for HTML-Based Emails

Enable Salesforce to track outbound HTML emails: Custom HTML and Letterhead.

- From Setup, enter Activity Settings in the Quick Find box, then select Activity Settings.
- 2. Select Enable Email Tracking.
- 3. Click Submit.

If you disable this option, Salesforce no longer stores email tracking information.

In Lightning Experience, use the HTML status report on the Reports tab. In Salesforce Classic, add the HTML Email Status related list to page layouts to display email statistics to your users.

EDITIONS

Available in Lightning Experience and Salesforce Classic

Available in: All Editions

USER PERMISSIONS

To enable email tracking:

 Customize Application and Modify All Data

Troubleshoot Inbound Email Errors with Snapshots

Take a snapshot of inbound email messages so you can more easily troubleshoot inbound email errors.

Inbound email snapshots capture a copy of inbound email messages, helping you diagnose issues with email services such as Email to Salesforce, Email-to-Case, and Apex email services. Request a snapshot by specifying criteria for the email's To and From addresses, and when an inbound message meets that criteria, the snapshot records a single copy that you can view and download. The email itself is processed normally without alteration. Snapshots contain the:

- Sender's address
- Inbound email service address
- Date and time of the snapshot
- Full message contents, including headers and attachments

To enable inbound email snapshots, contact Salesforce.

To access inbound email, from Setup, enter *Email Snapshots* in the Quick Find

box, then select Email Snapshots. To request an inbound email snapshot, enter criteria for the To address (required) and From address (optional). Then click **Request**

Snapshot. The requested snapshot is added to the list of Pending and Completed Snapshots. When an inbound message meets your specified criteria, we take a snapshot and complete the request.

To view a completed snapshot:

| Option | Description |
|-----------------------|---|
| View snapshot details | Click Show Details to see when the snapshot was taken, the sender's address, and the inbound email service address. Click Hide Details to collapse the details section. |
| Download the snapshot | Click Download then either open the email as a .txt file or save it to your computer. |

Consider these tips when using inbound email snapshots:

- You can have a maximum combined total of 25 pending and completed snapshots. Delete some to free up space for new snapshots. You can delete any pending or completed snapshot, even if someone else originally requested it.
- Deleted snapshots are permanently deleted. They're not moved to the Recycle Bin.
- When specifying criteria for the To address, keep these tips in mind.
 - The criteria apply to any of the addresses specified in an email's To, CC, or BCC fields (not only the To field).
 - Inbound email service addresses always end in salesforce.com.
 - You may want to look up the addresses your organization uses. This table summarizes where to find them.

| Type of inbound email address | Where to find addresses |
|---|---|
| The user's unique Email to Salesforce address | From the user's personal settings, enter <i>Email to</i> Salesforce in the Quick Find box, then select Email |

EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: All Editions except for **Database.com**

USER PERMISSIONS

To request, view, download, and delete email snapshots:

Modify All Data

| Type of inbound email address | Where to find addresses |
|--|---|
| | to Salesforce to view the unique address assigned to them by Email to Salesforce. |
| Email routing addresses for Email-to-Case or On-Demand Email-to-Case | From Setup, enter <i>Email-to-Case</i> in the Quick Find box, then select Email-to-Case to open the Email-to-Case settings page. View the Routing Addresses section. |
| Your organization's email service addresses | From Setup, enter <i>Email Services</i> in the Quick Find box, then select Email Services , then the name of an email service. |

- You can use an asterisk (*) wildcard in both the local-part of the email address (the part before the @ symbol) and in the domain-part (the part after the @ symbol). Spaces, commas, and semicolons aren't valid characters. Each address field can contain a maximum of 255 characters.
- If you want to request more than one snapshot with identical criteria, click Request Snapshot multiple times.
- If you believe that a snapshot should have completed but it still shows Pending status, try refreshing the page.
- Snapshots don't expire. If no inbound emails match the specified criteria, a requested snapshot remains in Pending status indefinitely. Completed snapshots persist until you delete them.

SEE ALSO:

Use Email Logs to Monitor Emails Sent from Salesforce in Salesforce Classic Personalize Your Salesforce Experience

Guidelines for Working with Email

Consider a few pieces of advice for working with emails, including information for customers that use Email-to-Case and Enhanced Email.

General

- You can't use custom currency fields with emails.
- Emails can have only one record type.
- If you enable Compliance BCC Email, each outgoing email is automatically copied to a compliance email address. Emails don't have a BCC option.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: All Editions

Email Statistics

- The HTML Email Status related list, which is only available in Salesforce Classic, shows the date when an email was first opened, the number of times that it was opened, and the date when it was most recently opened. The HTML Email Status related list includes automatic emails such as those sent through Web-to-Lead and Web-to-Case response rules.
- To report on the statistics in the HTML Email Status related list, use the HTML Email Status Report that's available from the Reports tab.

File Attachments

- In Lightning Experience, you can customize whether to send files as links or attachments, depending on the total size of all attached files. From Setup, enter *Email Attachments* in the Quick Find box, then select **Email Attachments** under Email.
 - If the combined size of all files attached to an email exceeds the Salesforce limit, 3 MB, or if you use mass or list email, the actual files are not attached to the email when it's sent. Instead, a link to each file is attached to the email. When a recipient clicks a link, it opens the corresponding attachment in Salesforce Files. For example, if you attach two 1.7-MB files to an email and send it, the recipient receives the email with two links attached to it.
 - Attachments that are sent as links in Salesforce Classic expire after 30 days. You can expire the link manually.
 - Attachments that are sent as links in Lightning Experience don't expire automatically. You can expire the link manually.
- In Salesforce Classic, you can attach multiple files to an email as long as the total size of all attached files doesn't exceed 10 MB.

For Organizations That Use Email to Case

- Email messages that aren't associated with cases can't be displayed in communities.
- You may need to review triggers and workflow rules that use the EmailMessage object. For EmailMessage records associated with cases, the ParentID field is always populated. With Enhanced Email, EmailMessage records may be associated with other records and the ParentID field may be blank. As a result, you may need to update your triggers and workflow rules to handle email messages with a blank ParentID field.

For Organizations That Use Enhanced Email

- An email is stored as both an Email Message record and a Task record. However, the email detail page only shows the Email Message record—not the Task record.
- If your organization uses business logic that incorporates tasks and emails, you may need to:
 - Recreate any custom Task fields on the Email Message object.
 - Migrate any Task object triggers to the Email Message object.

SEE ALSO:

Send Email in Salesforce Classic Send Mass Email in Salesforce Classic

Relate Emails to Records with Email to Salesforce

It's easy to track your sales-related communications. Use Email to Salesforce to capture email sent with external email applications such as IBM® Lotus Notes® and Microsoft® Outlook® and with webmail such as Gmail® and Yahoo! Mail®. Then relate those emails to leads, contacts, and opportunities, or to other specific records in Salesforce.

How Does Email to Salesforce Work?

When you send email from external email applications, use Email to Salesforce to automatically relate those emails to your Salesforce leads, contacts, opportunities, and other specific Salesforce records.

Set Up Email to Salesforce

To be able to use Email to Salesforce, start by configuring it.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: All Editions

Enable Email to Salesforce for Your Users

Let your users add email to Salesforce records. Email to Salesforce lets users assign emails to leads, contacts, opportunities, and other specific records in Salesforce. That way, it's easy to track sales-related communications.

Relate Emails to Your Salesforce Records Using Email to Salesforce

Email to Salesforce lets you track your sales-related emails in Salesforce. Relate emails that you send with external email applications to leads, contacts, opportunities, and other specific Salesforce records.

Handle Emails That Email to Salesforce Doesn't Assign to Records

When emails are sent to Salesforce via Email to Salesforce or Salesforce for Outlook, some are assigned to related records based on your Email to Salesforce settings. The rest are added to My Unresolved Items, where you assign them to related Salesforce records or confirm that you want to leave them unassigned.

Considerations for Using Email to Salesforce

Before you use Email to Salesforce, consider a few key points.

Guidelines for Using Email to Salesforce

If you're using Email to Salesforce, review a few key points for additional information.

How Does Email to Salesforce Work?

When you send email from external email applications, use Email to Salesforce to automatically relate those emails to your Salesforce leads, contacts, opportunities, and other specific Salesforce records.

When composing, forwarding, or replying to an email, you enter a special Email to Salesforce address in the BCC field (or any other recipient field). Salesforce receives a copy of the email. Depending on your configuration, Salesforce adds the email to the Activity History related list of the record whose email address matches the recipient's email address, or to the My Unresolved Items page. From the My Unresolved Items page, you can manually assign the email to a record. Unassigned emails also appear in your open task list.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: All Editions

Relating Emails to Leads, Contacts, and Opportunities

If you configure Email to Salesforce to associate emails to matching leads or contacts, Salesforce searches the To and CC fields for the email addresses of your leads or contacts. If any leads or contacts are found, Salesforce saves the email to the Activity History related list on the appropriate record.

If you configure Email to Salesforce to associate emails to matching opportunities, Salesforce searches the To and CC fields for the email addresses of your contacts. If contacts are found, Salesforce saves the email to the Activity History related list on all open opportunities, as long as the contact is assigned a contact role on the opportunity.

If Salesforce can't match any email addresses for recipients that appear in the To and CC fields of emails that you add to Salesforce, the My Unresolved Items page displays one row for each email.

Relating Emails to Specific Records

To relate an email to a specific Salesforce record, include the record ID in the subject line or body of the email.

If you configure Email to Salesforce to associate email with matching leads, contacts, or opportunities, an unresolved task is created when an email is associated with a lead, contact, or opportunity using a record ID but not a matching email address. For example, you configure emails to be associated with matching leads. You then send an email directly to your Email to Salesforce address with a lead record ID in the body or subject line of the email. The email is associated with the lead, and an unresolved task is created.

Getting Started

When your Salesforce admin activates Email to Salesforce, you receive an email that contains your system-generated Email to Salesforce address. This address also appears in your personal settings.

Access your personal settings to configure Email to Salesforce before you use it.

SEE ALSO:

Considerations for Using Email to Salesforce
Set Up Email to Salesforce
Relate Emails to Your Salesforce Records Using Email to Salesforce
Guidelines for Using Email to Salesforce

Set Up Email to Salesforce

To be able to use Email to Salesforce, start by configuring it.

- 1. From your personal settings, enter *Email to Salesforce* in the Quick Find box, then select **My Email to Salesforce**.
- 2. Enter your own email address in My Acceptable Email Addresses. If you send email from more than one address, separate each address with a comma.
 - (1) Important: Your Email to Salesforce address accepts email only from addresses that you list here. If you don't list an email address, email that's sent to your Email to Salesforce address isn't associated with any records.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: All Editions

- 3. Under Email Associations, select options as needed.
- 4. If you exclude multiple email domains from automatic association in Excluded Domains, separate them with commas.
- 5. Click Save.

SEE ALSO:

Considerations for Using Email to Salesforce Relate Emails to Your Salesforce Records Using Email to Salesforce Personalize Your Salesforce Experience Guidelines for Using Email to Salesforce

Enable Email to Salesforce for Your Users

Let your users add email to Salesforce records. Email to Salesforce lets users assign emails to leads, contacts, opportunities, and other specific records in Salesforce. That way, it's easy to track sales-related communications.

- From Setup, enter Email to Salesforce in the Quick Find box, then select Email to Salesforce.
- 2. Click Edit.
- 3. Select Active.
- **4.** If you plan to configure Email to Salesforce to verify the legitimacy of the sending server before processing a message, ensure that the senders who you expect to use Email to Salesforce support at least one of these authentication protocols.
 - SPF
 - Senderld
 - DomainKeys

Email to Salesforce accepts the email only if the sending server passes at least one of these protocols and doesn't fail any of them.

To configure Email to Salesforce to verify the legitimacy of the sending server before processing a message, select **Advanced Email Security Settings**.

- 5. Click Save.
- **6.** To notify users that Email to Salesforce is activated, click **Send Notification Email**. Otherwise, click **Skip This Step**.

Salesforce creates a unique Email to Salesforce address for each user. Users view their Email to Salesforce address and customize their settings on the My Email to Salesforce page in their personal settings. For more information, see How Does Email to Salesforce Work? on page 276.

SEE ALSO:

How Does Email to Salesforce Work?
Personalize Your Salesforce Experience

Relate Emails to Your Salesforce Records Using Email to Salesforce

Email to Salesforce lets you track your sales-related emails in Salesforce. Relate emails that you send with external email applications to leads, contacts, opportunities, and other specific Salesforce records.

To relate emails sent from external email applications to leads, contacts, or opportunities:

- Compose an email from an email account that you listed in My Acceptable Email Addresses on the My Email to Salesforce setup page.
- 2. Enter your Email to Salesforce address in the BCC field.
- 3. Enter the email recipients in the To and CC fields.
- 4. Send the email.

To relate externally sent emails to specific Salesforce records:

1. Compose an email from an email account that you listed in My Acceptable Email Addresses on the My Email to Salesforce setup page.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: All Editions

USER PERMISSIONS

To enable or disable Email to Salesforce:

Modify All Data

Classic and Lightning

Available in: both Salesforce

EDITIONS

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- 2. Locate the record ID of the record to associate the email with. The record ID is the 15-digit, case-sensitive, alphanumeric code at the end of the URL for the record.
- 3. In the subject line or body of the email, type ref: followed by the record ID. For example: ref: 701D0000000HQZy.
- 4. Enter your Email to Salesforce address in the To, CC, or BCC field.
- 5. Send the email.

SEE ALSO:

Considerations for Using Email to Salesforce Guidelines for Using Email to Salesforce Set Up Email to Salesforce

Handle Emails That Email to Salesforce Doesn't Assign to Records

When emails are sent to Salesforce via Email to Salesforce or Salesforce for Outlook, some are assigned to related records based on your Email to Salesforce settings. The rest are added to My Unresolved Items, where you assign them to related Salesforce records or confirm that you want to leave them unassigned.

Available in: both Salesforce Classic and Lightning Experience (only when prompted to resolve Salesforce for Outlook items from the Windows system tray)

Available in: All Editions except Personal Edition

- 1. Access your unassigned emails in My Unresolved Items.
- **2.** Choose one of these actions.
 - Assign to related records: Enter a related record in one or both fields. If you need to, select
 the correct record type from the drop-down list. If you assign a lead, you can't assign more
 records. To cancel an assignment, clear an entry.
 - Leave unassigned: The text *Unresolved Email:* is removed from the subject line, and the email is assigned to you as a completed task. If the task's Status picklist includes more than one "completed" status, Salesforce uses the first one.
- 3. Save your changes.

Assigned emails are added to the associated records. All modified items are removed from the list.

Considerations for Using Email to Salesforce

Before you use Email to Salesforce, consider a few key points.

General Considerations

• Use Email to Salesforce to capture email sent with external email applications such as IBM® Lotus Notes® and Microsoft® Outlook® and with webmail such as Gmail® and Yahoo! Mail®.

USER PERMISSIONS

To view or edit unresolved emails:

 Edit on tasks and Read on the objects that you assign to the email

AND

Email to Salesforce

OR

Add Email in Salesforce for Outlook and Email to Salesforce

To create Salesforce records:

Edit on tasks

AND

Show Quick Create and Create on those objects

To see recently used data in the related records fields:

 Lookup Auto-Completion in Search Settings

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: All Editions

- Email to Salesforce attempts to match the email address in the To or CC fields with the one in the Email standard field. Email to Salesforce doesn't support matching on custom email fields.
- Salesforce ignores invalid IDs or IDs for records that you don't have read access to.
- Email to Salesforce is required to use the Add Email feature with Salesforce for Outlook. Disabling one feature disables the other. With Salesforce for Outlook, you add emails via Add Email and Send and Add, not the BCC field.
- If you enter a recipient's email address in the BCC field, the owner of the address receives the email, but the email isn't related to records that contain the email address.

Limits

- The maximum number of email addresses that Email to Salesforce can match is 50. If the combined number of addresses in the To and CC fields exceeds this limit, Email to Salesforce processes only the first 50 unique addresses in the email.
- Email to Salesforce can create a maximum of 50 email activities for each email that it receives. It can relate up to 50 contacts to each email task record.
- The size limit for an attached file is 25 MB when attached directly to the related list. The size limit for an email message, including attachments, is 25 MB. For each matching record, all attachments that are sent with the email are duplicated, which affects your data size limit. Any attachments that aren't added are listed in the confirmation email that you receive from Salesforce.
- Email text and HTML are truncated to 32 KB.

Guidelines for Using Email to Salesforce

If you're using Email to Salesforce, review a few key points for additional information.

General Guidelines

- For easy access, add your Email to Salesforce address to the address book of your email program.
- When you use Email to Salesforce to save a message as an email activity, the default task type
 is specified by the Send Email Default setting. To change the default value, edit the
 Task Type picklist field.
- Emails that come from excluded domains go to My Unresolved Items. From there, manually assign them or leave them unassigned.
- To save a message as an email activity without sending it to another person, forward the email with your Email to Salesforce address in the To field. Make sure that no other email address is in the To, CC, or BCC fields. Salesforce receives a copy of the email and searches the From, To, and CC fields in the forwarded email for the email addresses of your leads and contacts. If any leads or contacts are found, Salesforce saves the email in the Activity History related list on the appropriate record.
- If Email to Salesforce matches an email address to multiple lead or contact records in Salesforce, you can associate the email with all matching records, the oldest record, or the record with the most activity.
- If Email to Salesforce matches an email to multiple opportunity records in Salesforce, the email is included in the activity history on all matching open records.

Record IDs

- The record ID is the 15-digit, case-sensitive, alphanumeric code at the end of the URL for a record. For example, if you view the detail page of a campaign record, the URL resembles this one:

 https://yourInstance.salesforce.com/701D0000000HQZy. The record ID for this record is 701D0000000HQZy.
- You can type record IDs on a separate line or within the email body text if surrounded by (), [], or {}. For example: (ref: 701D0000000HQZy). Separate multiple record IDs with commas, for example: ref: 701D0000000HQZy, 801D0000000IRAz, 901D000000JSBa.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: All Editions

Send Email to a Group: List Email and Mass Email

To send an individual copy of an email to a group of people, use list email and mass email. Create a list of recipients to target the email. Use templates with merge fields to personalize each copy of the email.

Send List Email in Lightning Experience

List email sends an individual email to each recipient instead of one email to the entire group. Send individual, personalized, emails to recipients on contact and lead lists and members of a campaign. Or, choose individual records on a list or campaign view. Use email templates with merge fields to customize each email. List email is intended to facilitate your business processes, not to replace your email application or handle mass-marketing campaigns.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

Send Mass Email in Salesforce Classic

Send individual copies of an email a list of contacts, leads, or person accounts for small-scale sales or support. Mass email sends an individual email to each recipient instead of one email to the entire group. Use templates with merge fields to personalize each copy of the email. Mass email is intended to facilitate your business processes, not to replace your email application or handle mass-marketing campaigns.

Send List Email in Lightning Experience

List email sends an individual email to each recipient instead of one email to the entire group. Send individual, personalized, emails to recipients on contact and lead lists and members of a campaign. Or, choose individual records on a list or campaign view. Use email templates with merge fields to customize each email. List email is intended to facilitate your business processes, not to replace your email application or handle mass-marketing campaigns.

Considerations for Sending List Email in Lightning Experience

Before you send a list email—an email to a list of contacts, leads, or campaign members—consider a few key points.

Send a List Email in Lightning Experience

Create and send a list email, which sends an individual email to each recipient in the list.

List Email Limitations

See the limitations for sending list emails.

EDITIONS

Available in: Lightning Experience

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

Considerations for Sending List Email in Lightning Experience

Before you send a list email—an email to a list of contacts, leads, or campaign members—consider a few key points.

- List email isn't available in communities.
- Campaign merge fields can't be used in list emails.
- To send a list email to person accounts, create a contact list view.
- To log list email activities, list email logging must be enabled. It is on by default.
 To confirm the setting, from Setup, enter Deliver in the Quick Find box, then select
 Deliverability. Examine the checkbox Log activities for email recipients.

EDITIONS

Available in: Lightning Experience

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

- Your reps can't create a list email in the Salesforce app, but they can see the activity in the activity timeline.
- Reps can use Salesforce Classic to view list email activity in the Activity History list. However, to show the list email record when a rep clicks the list email activity, enable enhanced email.
- Removing the Send List Email button from the List View doesn't remove it from the Recently Viewed page.
- The Send List Email button isn't available in Kanban view.
- When a rep sends a list email that's using a Classic email template with an attachment, the attachment isn't shown in the list email record.
- You can't send a list email using a Classic Visualforce email template. Similarly, Classic Visualforce email templates aren't supported in the Lightning List Email action.
- The From address for list emails differs depending on whether the rep is using Einstein Automatic Capture.
 - With Einstein Automatic Capture: the From address is the email address that's specified in the rep's user record. For example, the rep can't use any email addresses in connected accounts.
 - Without Einstein Automatic Capture: the From address is the rep's return address or, if their return address isn't specified, their email address

SEE ALSO:

Send a List Email in Lightning Experience Edit Your Email Settings

Send a List Email in Lightning Experience

Create and send a list email, which sends an individual email to each recipient in the list.

Before creating the list email, verify that you have a contact or lead list view, or a campaign, with the recipients you want.

?

Tip: To email everyone on a report, run the report and add the resulting records to a campaign. Then send a list email to that campaign.

To use an email template from Salesforce Classic, create the template before creating the list email.

- 1. Navigate to a contact or lead list view, or a campaign member view.
- **2.** Select the checkbox next to individual records you want to email, or select all records on the page.
- 3. Click Send List Email.

EDITIONS

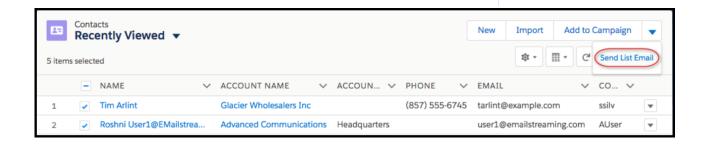
Available in: Lightning Experience

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



To use list emails:

 Allow sending of List Emails

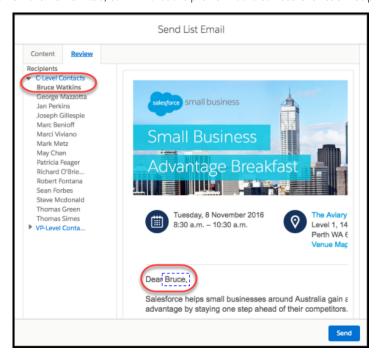


4. If you want, add the names of list views or campaigns in the Recipients field. You can add contact and lead list views for the same list email.

If you're sending a list email to at least one campaign, use the Related To field to select a campaign. The campaign tracks all the engagement metrics from the list email, such as total sent.



- 5. Add content or insert an email template.
- **6.** Customize the content or add attachments.
- 7. On the **Review** tab, confirm that the preview looks correct. Click each recipient's name to see any personalization.



8. Click Send.

You get an email when the list email is sent. You can also see that the email was sent by looking in the recipient's activity timeline. The activity timeline of each recipient shows the list email in the Past Activities section of the activity timeline. Click the activity to see more details. A sample of the sent list email is stored in its original format along with details like recipients and attachments, and statistics such as total sent.

SEE ALSO:

Considerations for Sending List Email in Lightning Experience

List Email Limitations

See the limitations for sending list emails.

The following limitations apply to list emails.

- List emails can contain up to 32,000 characters.
- You can manually select up to 200 contacts or leads from a contact or lead list view.
- You can send up to the daily list email limit by entering the list view name in the Recipients field. Or, click **Send List Email** from a Contact list view, Lead list view, or Campaign record without selecting any individual records.
- List emails count against an org's daily list email send limit, which is typically 5,000 emails per day. This limit doesn't include individual emails you send.

EDITIONS

Available in: Lightning Experience

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

Send Mass Email in Salesforce Classic

Send individual copies of an email a list of contacts, leads, or person accounts for small-scale sales or support. Mass email sends an individual email to each recipient instead of one email to the entire group. Use templates with merge fields to personalize each copy of the email. Mass email is intended to facilitate your business processes, not to replace your email application or handle mass-marketing campaigns.

Considerations for Sending Mass Email in Salesforce Classic

Before you send a mass email—an email to a list of contacts, leads, or person accounts—consider a few key points.

Send Mass Email in Salesforce Classic

Send an email to a group of contacts, leads, person accounts, or coworkers all at the same time.

View the Status of Your Mass Email in Salesforce Classic

Stay in-the-know with an auto-generated status email for each mass email that you send.

Mass Email Queue: Monitor the Status of Mass Emails Sent Through Salesforce

The mass email queue lets you view the status of scheduled mass emails that you've personally sent or the status of scheduled mass emails for your Salesforce org. You can cancel mass emails if necessary. You can view the status of your personal mass emails from your personal settings. If you have permission, you can view the status of organization-wide mass emails from Setup.

Guidelines for Sending Mass Email in Salesforce Classic

If you're sending mass email—an email to a list of contacts, leads, or person accounts—refer to these guidelines for additional information.

Mass Email Limitations

See the limitations for sending mass emails.

EDITIONS

Available in: Salesforce Classic

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

Considerations for Sending Mass Email in Salesforce Classic

Before you send a mass email—an email to a list of contacts, leads, or person accounts—consider a few key points.

- You can send a mass email to a recipient list that consists of contacts, leads, person accounts, or users that you can view in Salesforce.
- If a standard email field is hidden via field-level security, the Mass Email links for contacts and leads don't appear.
- Mass email can be sent to an address in a standard email field. Mass email with a custom email field isn't supported.
- Before you send a mass email, create a custom view of contacts, leads, person accounts, or cases without an email address. In the search criteria, choose "Email equals," and leave the third field blank. You can then update those records before sending your emails. You can't validate an email address without sending an email message.
- You can't send a mass email using a Visualforce email template.
- Attachments in mass emails are sent as links rather than as physical files. When recipients click the attachment link in the email, the attachment opens in a separate browser window, and they can download the file. Attachments are stored for 30 days.
- Mass email functionality does not recognize duplicates or remove them from a mass email list. All records that meet the filter criteria are pulled into the list, even if they share the same email address.
- Note: The addressed and sent-to numbers in mass email status messages differ in the following situations.
 - One or more selected recipients opted out of receiving mass email after the mass email was scheduled but before it was
 processed.
 - One or more selected recipient email addresses were removed from the contact or lead after the mass email was scheduled but before it was processed.
 - The user who sent the mass email was deactivated after the mass email was scheduled but before it was processed.
 Salesforce does not send mass emails scheduled by a user who is deactivated.

SEE ALSO:

Mass Email Limitations

EDITIONS

Available in: Salesforce Classic

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

Send Mass Email in Salesforce Classic

Send an email to a group of contacts, leads, person accounts, or coworkers all at the same time.



Note: You can't use an organization-wide address to send a mass email.

Watch a Demo: Sending Mass Email (Salesforce Classic)

1. Depending on who the recipients of your mass email are, do one of the following.

For contacts or person accounts

On the Contacts or Cases tab, in the Tools section at the bottom of the page, click **Mass Email Contacts**.

If you use person accounts, the link also appears on the Accounts tab.

For leads

On the Leads tab, in the Tools section at the bottom of the page, click **Mass Email Leads**.

For coworkers (other Salesforce users)

If you have the Manage Users permission, from Setup, enter Mass Email Users in the Quick Find box, and then select Mass Email Users.

- 2. Select a list view of recipients, and then click Go!.
- **3.** All recipients in the list view are selected by default. To remove recipients, deselect them.
- 4. Click Next.
- 5. Choose an email template.
- **6.** To view the templates, click the **Preview** links.
- 7. Click Next.
- 8. On the confirmation page, select the processing options to use. The mass email name that you specify appears in the queue and status messages that you receive from Salesforce, not in the email that you're sending.
- 9. In Delivery Options, send the email, or choose a date and time zone for sending the email in the future.
- 10. Click Send, and then click Finished.

SEE ALSO:

Considerations for Sending Mass Email in Salesforce Classic Guidelines for Sending Mass Email in Salesforce Classic View the Status of Your Mass Email in Salesforce Classic Email Templates in Salesforce Classic Send Email to a Group: List Email and Mass Email

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To send mass emails to contacts, person accounts, or leads:

Mass Email

To send mass emails to coworkers:

Mass Email

AND

Manage Users

To send mass emails and log them in the Activity History related list:

Mass Email

AND

Edit Tasks

View the Status of Your Mass Email in Salesforce Classic

Stay in-the-know with an auto-generated status email for each mass email that you send.

- **1.** Make sure that your Salesforce org is configured to receive email notifications for mass emails. See your Salesforce admin for help.
- ${\bf 2.}$ When creating the mass email, enter a value in the Mass Email Name field.

This value appears in the subject line of the status email. The content of the mass email sent to recipients (including the subject line) is determined by the email template.

3. Send the mass email.

The status message that you receive shows the number of recipients that the mass email was addressed and sent to.

SEE ALSO:

Guidelines for Sending Mass Email in Salesforce Classic Guidelines for Configuring Deliverability Settings for Emails Sent from Salesforce Personalize Your Salesforce Experience

EDITIONS

Available in: Salesforce Classic

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

Mass Email Queue: Monitor the Status of Mass Emails Sent Through Salesforce

The mass email queue lets you view the status of scheduled mass emails that you've personally sent or the status of scheduled mass emails for your Salesforce org. You can cancel mass emails if necessary. You can view the status of your personal mass emails from your personal settings. If you have permission, you can view the status of organization-wide mass emails from Setup.

The mass email queue shows the number of recipients that the mass email was addressed to and sent to. These numbers may differ because:

- One or more selected recipients opted out of receiving mass email after the mass email was scheduled but before it was processed.
- One or more selected recipient email addresses were removed from the contact or lead after the mass email was scheduled but before it was processed.
- The user who sent the mass email was deactivated after the mass email was scheduled but before it was processed. Salesforce does not send mass emails scheduled by a user who is deactivated.

SEE ALSO:

Use Email Logs to Monitor Emails Sent from Salesforce in Salesforce Classic Send Mass Email in Salesforce Classic

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view your mass email or cancel your pending mass email:

Mass Email

To view all mass email or cancel pending mass email in your organization:

Modify All Data

Guidelines for Sending Mass Email in Salesforce Classic

If you're sending mass email—an email to a list of contacts, leads, or person accounts—refer to these guidelines for additional information.

- By default, the My Contacts, My Leads, Active Users, or My Cases views include all records with an email address. To change the list of recipients, create a custom view. If the record contains no email address, or Email Opt Out is selected, a contact, lead, or person account isn't included in any email list views. Person accounts are included in contact list views.
- In the email template preview window, the template displays any merge fields included in it, such as {!Account.AccountNumber}. When you send your email, data from the recipients' records, or any applicable substitute text, is inserted into the email in place of those merge fields.



Available in: Salesforce Classic

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

- When Store an activity for each message is selected (default), the Activity History item is associated with the contact, lead, or person account and is displayed as "Mass Email:<Template Description>." The email subject, body, and attachments aren't stored in the Activity History item. Logging Activity History items requires access for viewing or editing the records in the recipient list and the "Edit Task" permission.
- If the email deliverability option Notify sender when mass email completes is selected, you receive an auto-generated status email from Salesforce for each mass email that you send. The subject line of the status email contains the value that you entered in the Mass Email Name field when sending the mass email.
- To view and cancel mass emails that you've scheduled, from your personal settings, enter *Mass Emails* in the Quick Find box, then select **Mass Emails** or **My Mass Emails**.

To view and cancel mass emails that anyone in your company scheduled, if you have the "Manage Users" permission, from Setup, enter <code>Mass Emails</code> in the <code>Quick Find</code> box, then select <code>Mass Emails</code>.

SEE ALSO:

Send Mass Email in Salesforce Classic Guidelines for Configuring Deliverability Settings for Emails Sent from Salesforce

Mass Email Limitations

See the limitations for sending mass emails.

You can send mass email to a maximum of 5,000 external email addresses per day per org based on Greenwich Mean Time (GMT).

The following limitations also apply to mass emails.

- The single and mass email limits don't take unique addresses into account. For example, if you have johndoe@example.com in your email 10 times, that counts as 10 against the limit.
- You can send an unlimited amount of email to your org's internal users, which includes portal users.
- You can send mass emails only to contacts, person accounts, leads, and your org's internal users.
- In Developer Edition orgs and orgs evaluating Salesforce during a trial period, you can send mass email to no more than 10 external email addresses per day. This lower limit doesn't apply if your org was created before the Winter '12 release and already had mass email enabled with a higher limit. Additionally, your org can send single emails to a maximum of 15 email addresses per day.
- You can't send a mass email using a Visualforce email template.

Sales Productivity Email Templates

Email Templates

Use email templates to increase productivity and ensure consistent messaging. Email templates with merge fields let you quickly send emails that include field data from Salesforce records like contacts, leads, or opportunities. You can use email templates when emailing groups of people—with list email or mass email—or just one person.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: All Editions

Standardize Email with Email Templates

Use email templates to increase productivity and ensure consistent messaging. Email templates with merge fields let you quickly send emails that include field data from Salesforce records. You can create your own, or use templates created by others in your organization.

Select an Email Template When You Compose an Email

When composing an email, use an email template to speed things up and make sure you're sending the right message. You can use your own email template, or one from your company.

Considerations for Using Content from External Sources in Email Templates

If you copy and paste content from external sources, such as Microsoft Word or a web page, to an email template, you can get strange formatting results. You might be pasting hidden formatting or nonstandard characters. The result is unusual formatting, content that looks like stray programming code, or question marks instead of apostrophes or quotation marks. Review these suggestions to avoid the problem.

Use Merge Fields in Email Templates

A merge field is a placeholder in an email template. When you send the email, the placeholder is replaced with the Salesforce data from the record or records of the people you are emailing. When using merge fields, it's a good idea to understand how they work and what to expect in your merged emails.

Email Templates in Lightning Experience

Use email templates to increase productivity and ensure consistent messaging. Email templates with merge fields let you quickly send emails that include field data from Salesforce records. Your page layout and field-level security settings determine which fields are available for merging. Templates you create are automatically public: they're available for use by others in your organization.

Email Templates in Salesforce Classic

Use email templates to increase productivity and ensure consistent messaging. Email templates with merge fields let you quickly send emails that include field data from Salesforce records.

SEE ALSO:

Send List Email in Lightning Experience Send Mass Email in Salesforce Classic

Standardize Email with Email Templates

Use email templates to increase productivity and ensure consistent messaging. Email templates with merge fields let you quickly send emails that include field data from Salesforce records. You can create your own, or use templates created by others in your organization.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions

Select an Email Template When You Compose an Email

When composing an email, use an email template to speed things up and make sure you're sending the right message. You can use your own email template, or one from your company.

If you select an email template that has attached files, you need file access to include them in emails you send from that template. If you need file access, we'll let you know.

- 1. Open the record from which you want to send email.
- 2. Click the **Activity** tab, then click the **Email** tab.
- **3.** To insert a template, click the **Templates** icon. Select the template you want and its contents appear.

In Lightning Experience, you can choose a Lightning email template that's global—where the template's related entity type is contact, lead, or nothing—or one that belongs to the category you chose in the email's Related To field—such as account or opportunity. Choose an email template's related entity type when you create the template from the Email Template page.

4. Edit your email as needed, then preview and send.

SEE ALSO:

Send List Email in Lightning Experience
Send Mass Email in Salesforce Classic
Create an Email Template in Lightning Experience

EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To send email:

Send Email

To send emails or use templates with attachments:

 Access to the file you're attaching

Considerations for Using Content from External Sources in Email Templates

If you copy and paste content from external sources, such as Microsoft Word or a web page, to an email template, you can get strange formatting results. You might be pasting hidden formatting or nonstandard characters. The result is unusual formatting, content that looks like stray programming code, or question marks instead of apostrophes or quotation marks. Review these suggestions to avoid the problem.

- Type content directly into the HTML email template. In Lightning Experience, use the Email Templates page. In Salesforce Classic, use Setup.
- In Salesforce Classic, change your template encoding to UTF-8. In Lightning Experience, all templates are in UTF-8.

EDITIONS

Available in: Salesforce Lightning Experience and Salesforce Classic

Available in: All Editions

- If you're copying from Microsoft Word, turn off the AutoFormat function or undo the automatic formatting as it occurs.
- Use a text-only editor such as Microsoft Notepad (for PCs) or TextEdit (for Macs) in plain text mode to strip out unwanted characters. Copy the content from your source, paste it into the text-only editor, copy it again, and paste it into your template.

Use Merge Fields in Email Templates

A merge field is a placeholder in an email template. When you send the email, the placeholder is replaced with the Salesforce data from the record or records of the people you are emailing. When using merge fields, it's a good idea to understand how they work and what to expect in your merged emails.

Considerations for Using Merge Fields in Email Templates

A merge field is a placeholder in an email template. When you send the email, the placeholder is replaced with the data from the record or records of the people you are emailing.

Use the Handlebars Template Language for Lightning Email Templates

Use the Handlebars template language—available in Summer '18—to add dynamic content to your Lightning email templates.

Use the Salesforce Merge Language in Lightning Email Templates

Read these considerations for using merge fields in Lightning email templates. This merge field language is called the Salesforce Merge Language (SML).

Use the Salesforce Merge Language in Classic Email Templates

Classic email templates use the Salesforce Merge Language (SML). Read these considerations for using SML.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: All Editions

Mass email not available in: Essentials, Personal, Contact Manager, and Group Editions

List email not available in: Essentials, Personal, Contact Manager, and Group Editions

HTML and Visualforce email templates are not available in Salesforce Classic: **Essentials** and **Personal** Editions

Considerations for Using Merge Fields in Email Templates

A merge field is a placeholder in an email template. When you send the email, the placeholder is replaced with the data from the record or records of the people you are emailing.

- The Created Date and Last Modified Date fields display only the date, not the date and time.
- If your template contains a merge field for which a record has no data, that field does not appear in the email you send.
- Give objects and fields unique names and labels. If two or more custom objects have matching names or labels, only one of the objects appears when you select from available merge fields.
- Merge fields have no value if they are defined for an object which doesn't match the recipient and related to record.



Note: Merge fields can also be used in an email, a mail merge template, a custom link, or a formula to incorporate values from a record.

SEE ALSO:

Use the Handlebars Template Language for Lightning Email Templates
Use the Salesforce Merge Language in Lightning Email Templates
Use the Salesforce Merge Language in Classic Email Templates
Merge Fields for Communities
Customize Email Sent from Communities

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: All Editions

Mass email not available in: Essentials, Personal, Contact Manager, and Group Editions

List email not available in: Essentials, Personal, Contact Manager, and Group Editions

HTML and Visualforce email templates are not available in Salesforce Classic: **Essentials** and **Personal** Editions

Use the Handlebars Template Language for Lightning Email Templates

Use the Handlebars template language—available in Summer '18—to add dynamic content to your Lightning email templates.



Note: In Summer '18, we introduced the Handlebars Merge Language (HML) for email templates in Lightning Experience. If your email template has merge fields with three curly braces ({{{}}}), you're using an HML email template. If the merge fields have one curly brace ({{}}), or an exclamation mark (!), you're using a SML email template.

Although based on the Handlebars template language, our HML implementation doesn't contain every Handlebars feature.

New ways to use merge fields include:

- Recipient merge fields that work with contact, lead and user records, in one email template
- ID merge fields that create links to Salesforce records
- More organization-level fields, such as FY Start Month

Email templates using HML can be used in list emails.



Note: Lightning email templates don't support triggers, workflows, or approvals.

Guidelines for Syntax and Formatting

The syntax consists of three open curly braces, followed by the object name, a period, the field name, and three closing curly braces.

EDITIONS

Available in: Lightning Experience

Available in: **All** Editions

List email not available in: Essentials, Personal, Contact Manager, and Group Editions For example, to include your recipient's first name, the merge field is {{Recipient.FirstName}}}. If you want to include the account ID number of the account related to the email, enter or choose this merge field: {{Account.Id}}}. When you preview or send the email, ID: 001234567890123displays where you inserted the merge field.

To make sure you're using the correct syntax, select merge fields from the merge field picker.



Important:

• If two or more custom objects have matching names or labels, only one of the objects appears when you select from available merge fields. Make sure that all custom objects have unique names and labels so that you can select merge fields from any of the objects.

SEE ALSO:

Convert a Lightning Email Template from SML to HML Considerations for Using Merge Fields in Email Templates

Use the Salesforce Merge Language in Lightning Email Templates

Read these considerations for using merge fields in Lightning email templates. This merge field language is called the Salesforce Merge Language (SML).



Note: In Summer '18, we introduced the Handlebars Merge Language (HML) for email templates in Lightning Experience. If your email template has merge fields with three curly braces ({{{}}, you're using an HML email template. If the merge fields have one curly brace ({{}}, or an exclamation mark (!), you're using a SML email template.

Guidelines for Syntax and Formatting

The syntax consists of an open curly brace and exclamation point, followed by the object name, a period, the field name, and a closing curly brace. For example, if you want to include the account number of your recipient, enter <code>ID: {!Account.AccountNumber}</code>, and the recipient's email displays <code>ID: 001234567890123</code> when you send or preview it.

To make sure you're using the correct syntax, select merge fields from the merge field picker.

EDITIONS

Available in: Lightning Experience

Available in: All Editions

List email not available in: Essentials, Personal, Contact Manager, and Group Editions

Important:

• If two or more custom objects have matching names or labels, only one of the objects appears when you select from available merge fields. Make sure that all custom objects have unique names and labels so that you can select merge fields from any of the objects.

Guidelines for Using Merge Fields

In Lightning Experience email templates, merge fields defined for an object which doesn't match the recipient and related to record don't have any value.

If your Lightning Experience email template uses a merge field for which there is no data in a particular record, that field doesn't appear in the sent email.

The following types of merge fields are not supported in Lightning Experience email templates:

- {!Receiving_User.field_name}
- {!Sending_User.field_name}
- {!BLANKVALUE(Contact.FirstName, "Valued Customer")}
- {!Contact.FirstName, Valued Customer}
- Campaign merge fields (can't be used in list emails)



Note: Lightning email templates don't support triggers, workflows, or approvals.

Use the Salesforce Merge Language in Classic Email Templates

Classic email templates use the Salesforce Merge Language (SML). Read these considerations for using SML.



Note: In Summer '18, we introduced the Handlebars Merge Language (HML) for email templates in Lightning Experience. If your email template has merge fields with three curly braces ({{{}}, you're using an HML email template. If the merge fields have one curly brace ({}), or an exclamation mark (!), you're using a SML email template.

Guidelines for Syntax and Formatting

The syntax consists of an open curly brace and exclamation point, followed by the object name, a period, the field name, and a closing curly brace. For example, if you want to include the account number of your recipient, you could enter ID: {!Account.AccountNumber}, and your recipient's email displays ID: 001234567890123.

A merge field's syntax can vary depending on where you're using the field. Most merge fields for email templates correspond directly with record fields.

To make sure you're using the correct syntax, select merge fields from the merge field picker.



(!) Important:

• If two or more custom objects have matching names or labels, only one of the objects appears when you select from available merge fields. Make sure that all custom objects have unique names and labels so that you can select merge fields from any of the objects.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: All Editions

Mass email not available in: **Essentials Personal.** Contact Manager, and **Group** Editions

HTML and Visualforce email templates are not available in Salesforce Classic: **Essentials** and **Personal Editions**

Guidelines for Using Merge Fields

General

- Don't use a hyperlink formula field in the subject of an email template or in the body of a text email template.
- In Classic email templates, you can add substitute text to any merge field. Substitute text appears in a sent email if the merge record does not contain data for that field. To add substitute text, place a comma after the field name and enter the text before the closing bracket, for example: Dear {!Contact.FirstName, Valued Customer}. When you save the template, the merge field appears in the template as Dear { !BLANKVALUE (Contact.FirstName, "Valued Customer") }. In this example, if there is no information in the First Name field of the contact record, the email you create with your template begins with "Dear Valued Customer".
- User fields are also known as Sending User fields for administrators and users with the "Manage Users" permission. Use them in email templates when referencing the person sending the email.
- Administrators and users with the "Manage Users" permission can use Receiving User merge fields for email templates to reference the recipient of the email.

Campaigns

Campaign member merge fields cannot be used with other types of merge fields in the same email template. For example, if you create an email template using a campaign member merge field and you want to include the title of the recipient, use {!CampaignMember.Title} instead of {!Lead.Title} or {!Contact.Title}.

Cases

- When account merge fields are included in an email template and this template is selected after a contact is added to the email To field, the account merge fields are populated from the contact's account, not the case's account.
- If you have enabled Email-to-Case or On-Demand Email-to-Case, you can create email templates that support agents can use to respond to case emails. These templates can include merge fields that display information from the original email in the response.

Connection Finder

Custom email templates must contain the survey URL. {!Contact.PartnerSurveyURL} is available as a contact merge field when creating templates.

Contacts

You can use custom Contact or Lead fields for merging, but only for documents generated from that field's object. For example, a custom Lead field can only be used for templates for leads.

Orders

Merge fields for products on orders in email templates aren't supported.

Workflow

To use merge fields from user records in email templates, select from the following merge field types:

- User Fields—Use these merge fields to represent the sending user. Merge fields named {!User.field_name} return values from the user record of the person who created or updated the record that triggered the workflow rule.
- Workflow Target User Fields—Use these merge fields only in email templates for workflow rules on the User object. Merge fields
 named {!Target_User.field_name} return values from the user record that was created or updated to trigger the
 workflow rule.
- Approval Process merge fields can be used in email templates, but not mail merge templates.

This release contains a beta version of workflow on the User object that is production quality but has known limitations. To provide feedback and suggestions, go to IdeaExchange.

SEE ALSO:

Use the Salesforce Merge Language in Lightning Email Templates Considerations for Using Merge Fields in Email Templates

Email Templates in Lightning Experience

Use email templates to increase productivity and ensure consistent messaging. Email templates with merge fields let you quickly send emails that include field data from Salesforce records. Your page layout and field-level security settings determine which fields are available for merging. Templates you create are automatically public: they're available for use by others in your organization.

EDITIONS

Available in: Salesforce Lightning Experience

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

Create an Email Template in Lightning Experience

Create email templates to save time and standardize email sent by you or others in your organization. Use merge fields if you need them. Your page layout and field-level security settings determine which fields are available for merging. Templates you create are automatically public: they're available for use by others in your organization.

Convert a Lightning Email Template from SML to HML

Take advantage of the Handlebars Merge Language (HML), which is more flexible than the Salesforce Merge Language (SML).

Use Your Classic Email Templates in Lightning Experience

Leverage all the work and planning that went into your Salesforce Classic email templates by using the same templates in Lightning Experience. You can use your Text, Custom HTML, Letterhead, and Visualforce email templates in Lightning Experience.

Considerations for Using Your Classic Email Templates in Lightning Experience

When using Classic email templates in Lightning Experience, keep these considerations in mind.

Create an Email Template in Lightning Experience

Create email templates to save time and standardize email sent by you or others in your organization. Use merge fields if you need them. Your page layout and field-level security settings determine which fields are available for merging. Templates you create are automatically public: they're available for use by others in your organization.



Note: If you are using a free org, you can have up to 500 email templates, of any kind, in that org.

From the email composer:

- 1. Open a record, such as an opportunity or account, that offers email.
- 2. Click the **Activity** tab, then click the **Email** tab.
- **3.** If you want, select a record in the Related To field. The kind of record you choose affects which merge fields are available in the merge picker.
- **4.** Compose the email to use as your template, or select an existing email template.
- 5. Add any attachments you want in the template.
- **6.** Click the **Merge** icon and use the merge picker to insert merge fields.
- 7. Click the **Templates** icon and then save the email template as new.

From the Email Templates page:

- 1. Click New.
- **2.** Compose the email to use as your template.
- **3.** If you want, select an item from the Related Entity Type dropdown list. Based on the selection, the email template can be chosen only when the email you are composing has a corresponding Related To record.
- 4. Click the Merge icon and use the merge picker to insert merge fields.
- **5.** Click the **Source** icon to add HTML code. If you need to navigate the record or other Salesforce pages as you work, pop out the composer window.
- 6. Click Save.

EDITIONS

Available in: Lightning Experience

Available in: Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To create email templates:

Send Email

To attach files to email or templates:

 Access to the file you're attaching

To delete email templates:

 Modify All Data or template ownership

To update email templates:

 Modify All Data or template ownership



Note: You can't add an attachment when you create an email template from the Email Templates page. Instead, add the attachment when you're composing an email, after you insert the email template.

SEE ALSO:

Convert a Lightning Email Template from SML to HML

Convert a Lightning Email Template from SML to HML

Take advantage of the Handlebars Merge Language (HML), which is more flexible than the Salesforce Merge Language (SML).

All Lightning email templates created before Summer '18 are SML email templates, even if they don't have any SML merge fields. All Lightning email templates created in Summer '18 and later are HML email templates, even if they don't have any HML merge fields.

You have several choices:

- If the email template doesn't have any merge fields, it's converted to an HML email template when you save it.
- You can continue to use Classic email templates and Lightning email templates with SML merge fields. You can update and save these email templates without having to remove SML merge fields.
- If you want to enter SML fields, do so manually. The merge picker shows HML fields only.
- If you add SML merge fields to an HML email template, you can't save the template until the SML merge fields are removed. You can still preview and send an email using an HML email template with SML merge fields, but the HML merge fields appear as text, not as merged data from Salesforce.
- If an email template is modified so that it only has HML merge fields, and no SML merge fields, it's converted to an HML email template when you save it.



Note: HML email templates can't be converted to SML email templates.

To convert Classic email templates to HML email templates:

- 1. Open the Classic email template.
- **2.** Copy and paste the content into a new Lightning email template. You can use either the Email Templates page or the email composer.
- 3. Remove existing SML merge fields or replace them with equivalent HML merge fields.
- 4. Save.

SEE ALSO:

Use the Handlebars Template Language for Lightning Email Templates

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To create email templates:

Send Email

To attach files to email or templates:

 Access to the file you're attaching

To delete email templates:

 Modify All Data or template ownership

To update email templates:

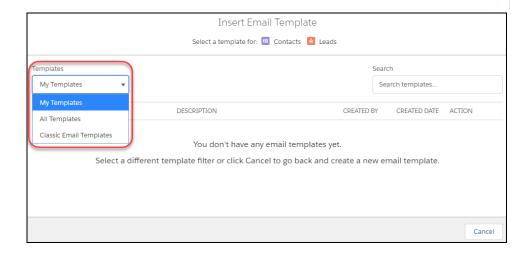
 Modify All Data or template ownership

Use Your Classic Email Templates in Lightning Experience

Leverage all the work and planning that went into your Salesforce Classic email templates by using the same templates in Lightning Experience. You can use your Text, Custom HTML, Letterhead, and Visualforce email templates in Lightning Experience.

When you insert an email template, change the filter to Classic Email Templates.





Considerations for Using Your Classic Email Templates in Lightning Experience

When using Classic email templates in Lightning Experience, keep these considerations in mind.

- The Lightning Email action layout must include the TemplateId field to display Classic email templates. The field is added by default to all Lightning Email action layouts.
- Attachments are read-only, and you can't add or remove an email attachment. You can download
 an attachment to verify the content.
- To change the attachments that are part of a Salesforce Classic email template, use Setup. Changes are reflected in the sent email, even if the changes aren't seen in the email composer.
- You can't forward an attachment if:
 - The email is sent or received in Salesforce Classic
 - The email attachment is part of a Classic email template and the email is sent using Lightning email actions
- Externally linked CSS files are not supported. Although the CSS resource is displayed in the preview section in a Classic email template, most email clients don't support externally linked CSS files.

Merge Fields

- Merge fields in the email template are resolved when the template is inserted, based on the values in the Recipient and Related To fields. If you change the Recipient and Related To values after you insert the template, the email content doesn't update.
 - Note: You don't need to preview the template to see how it looks after the fields have merged.
- You can't add, edit, or remove merge fields using the merge field modal picklist. However, you can add merge fields manually.
- Unresolved merge fields are removed when the template is inserted.



Text Email Templates

• You can edit both the subject and the body.

Custom HTML Email Templates

- You can't edit the subject or body. This is also true in Salesforce Classic.
- You can't pop out the email composer. The email must remain in docked mode.

Letterhead Email Templates

The behavior is the same as it is in Salesforce Classic.

- You can edit the subject.
- You can't edit the header and footer.
- Locked template sections remain locked and can't be edited.

Visualforce Email Templates

- The template is read-only.
- As with other attachments, dynamic attachments are in read-only mode and can't be removed.
- Templates are sent with their dynamic and static attachments.

Email Templates in Salesforce Classic

Use email templates to increase productivity and ensure consistent messaging. Email templates with merge fields let you quickly send emails that include field data from Salesforce records.

View and Edit Email Templates in Salesforce Classic

You have several options for viewing and editing your Classic email templates. You can add attachments and preview email templates too.

Clone Email Templates in Salesforce Classic

Cloning, or copying, an email template lets you use an existing email template as the basis for another template.

Types of Classic Email Templates

In Salesforce Classic, you can create four different types of email templates: text, HTML with letterhead, custom, and Visualforce. All of these email templates can include text, merge fields, and attached files.

Create Text Email Templates in Salesforce Classic

You can create plain-text email templates to send to recipients who can't read HTML email.

Create Custom HTML Email Templates in Salesforce Classic

You can create custom HTML email templates without using letterhead. If you don't know HTML, you can paste HTML code into your template.

Add Images to Email Templates in Salesforce Classic

You can include images, such as logos, in your custom HTML and Visualforce email templates.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: **All** Editions

Mass email not available in:

Personal, Contact Manager, and **Group**Editions

HTML and Visualforce email templates not available in:

Personal Edition

Letterhead Email Templates in Salesforce Classic

A letterhead defines the logo, page color, and text settings for your HTML email templates. Use letterheads to ensure a consistent look and feel in your company's emails.

Visualforce Email Templates in Salesforce Classic

With Visualforce email templates, users can send targeted and personalized emails. Template creators can harness the powerful Visualforce programming language to create templated email content.

View and Edit Email Templates in Salesforce Classic

You have several options for viewing and editing your Classic email templates. You can add attachments and preview email templates too.

Access Classic Email Templates

To access your email templates, do one of the following:

- If you have permission to edit public templates, from Setup, enter *Email Templates* in the Quick Find box, then select **Classic Email Templates**.
- If you don't have permission to edit public templates, go to your personal settings. Enter Templates in the Quick Find box, then select Email Templates or My Templates—whichever one appears.

Click the name of any email template to go to the Email Templates page.

- To edit or delete a template, click **Edit** or **Del** next to the template name in the list.
- Click New Template to create any type of Classic email template.
- If you have the "Manage Public Templates" permission, you can click [Change] next to the
 Author field to select a different author. By default, the author is the person who created the
 email template.
- If "Developer Mode" is enabled, see what components the template references by clicking Show Dependencies.

Edit Classic Email Templates

Editing options vary depending on the template type.

- For text templates, click **Edit** to change the message content, subject, or merge fields.
- For custom and HTML templates:
 - Change the content or merge fields of the HTML version by clicking **Edit HTML Version**.

Note: All custom and HTML email templates include a text-only version for recipients who can't view HTML emails. If you

Change the content or merge fields of the text-only version by clicking Edit Text Version.

Warning: We recommend that you leave the text-only version blank. If you leave it blank, Salesforce automatically creates the text-only content based on the current HTML version. If you enter content manually, subsequent edits to the HTML version aren't reflected in the text-only version. When left blank, the text-only content is automatically created when sending an email via the UI. If you use that same template to send email via the API or APEX, you must provide the text-only content. Remember to update text-only content when you change the HTML content.

leave the text-only version blank, the text-only version is generated automatically when you edit the HTML version.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: All Editions

Mass email not available in:

Personal, Contact Manager, and Group Editions

HTML and Visualforce email templates not available in: **Personal** Edition

USER PERMISSIONS

To create or change HTML email templates:

Edit HTML Templates

To create or change Visualforce email templates:

Customize Application

To create or change public email template folders:

- For Visualforce templates:
 - Change the markup of the template page by clicking Edit Template.
 - The Visualforce Attachments related list indicates which attachments are being generated through Visualforce markup.
 - If the Visualforce markup references components in installed managed packages, the Version Settings related list shows the
 package versions of the installed packages containing the components. Some kinds of components in installed managed
 packages can include another class, a trigger, or a custom object.
 - If the email template includes encrypted data, remember that the data is displayed as encrypted within the generated email and in the Visualforce template page. For security reasons, it isn't displayed in plain text.

Add Attachments

Click Attach File from the Attachments related list. The attached file is included in every email based on the template.

- To select a file:
 - To search for files in the Documents tab, click the Search in Documents link. If you select an image logo or other graphics file, mark the document Externally Available on the Documents tab.
 - Alternatively, select a file from your computer or from a document folder by choosing an option from the File Location dropdown list.

Preview Classic Email Templates

View a sample of the template populated with data from records you choose and send a test email by clicking **Send Test and Verify Merge Fields**.

SEE ALSO:

Clone Email Templates in Salesforce Classic

Clone Email Templates in Salesforce Classic

Cloning, or copying, an email template lets you use an existing email template as the basis for another template.



Note: If you are using a free org, you can have up to 500 email templates, of any kind, in that org.

Cloning an email template involves saving an existing email template with a new name.

- **1.** Do one of the following:
 - If you have permission to edit public templates, from Setup, enter *Email Templates* in the Quick Find box, then select **Classic Email Templates**.
 - If you don't have permission to edit public templates, go to your personal settings. Enter Templates in the Quick Find box, then select Email Templates or My Templates—whichever one appears.
- 2. Click the name of an email template in the list.
- 3. Click Clone.
- **4.** Choose a folder in which to store the template.
- **5.** To make the template available for use, select the Available For Use checkbox.
- **6.** Enter a name in Email Template Name.
- **7.** Enter a Description for the template. Both template name and the description are for your internal use only.
- 8. Click Save.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: All Editions

Mass email not available in:

Personal, Contact Manager, and **Group**Editions

HTML and Visualforce email templates not available in: **Personal** Edition

USER PERMISSIONS

To create or change HTML email templates:

Edit HTML Templates

To create or change Visualforce email templates:

Customize Application

To create or change public email template folders:

Types of Classic Email Templates

In Salesforce Classic, you can create four different types of email templates: text, HTML with letterhead, custom, and Visualforce. All of these email templates can include text, merge fields, and attached files.

- **Text** All users can create or change text email templates. See Create Text Email Templates in Salesforce Classic.
- HTML with letterhead Administrators and users with the "Edit HTML Templates" permission
 can create HTML email templates based on a letterhead. Letterheads define the look and feel
 of your HTML email templates. Your HTML email templates can inherit the logo, color, and text
 settings from a letterhead. See Create Letterhead Email Templates in Salesforce Classic.
- Custom HTML Administrators and users with the "Edit HTML Templates" permission can
 create custom HTML email templates without using a letterhead. You must either know HTML
 or obtain the HTML code to insert in your email template. See Create Custom HTML Email
 Templates in Salesforce Classic.
- Visualforce Administrators and developers can create templates using Visualforce. Visualforce
 email templates allow for advanced merging with a recipient's data, where the content of a
 template can contain information from multiple records. See Create Visualforce Email Templates
 in Salesforce Classic.
- Note: Classic email templates used in the following features must be both public and active:
 - Web-to-Lead
 - Web-to-Case
 - Email-to-Case or On-Demand Email-to-Case
 - Assignment rules
 - Escalation rules
 - Auto-response rules

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: All Editions

Mass email not available in:

Personal, Contact Manager, and **Group**Editions

HTML and Visualforce email templates not available in: **Personal** Edition

USER PERMISSIONS

To create or change HTML email templates:

Edit HTML Templates

To create or change Visualforce email templates:

Customize Application

To create or change public email template folders:

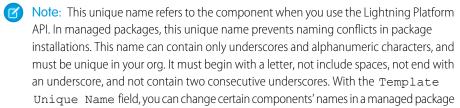
Create Text Email Templates in Salesforce Classic

You can create plain-text email templates to send to recipients who can't read HTML email.



Note: If you are using a free org, you can have up to 500 email templates, of any kind, in that org.

- 1. Do one of the following:
 - If you have permission to edit public templates, from Setup, enter Email Templates
 in the Quick Find box, then select Classic Email Templates.
 - If you don't have permission to edit public templates, go to your personal settings. Enter *Templates* in the Quick Find box, then select **Email Templates** or **My Templates**—whichever one appears.
- 2. Click New Template.
- 3. Choose the Text template type, and click Next.
- **4.** Choose a folder in which to store the template.
- 5. To make the template available for use, select the Available For Use checkbox.
- 6. Enter a name in Email Template Name.
- 7. If necessary, change the Template Unique Name.



and the changes are reflected in a subscriber's organization.

- 8. If desired, choose a different character set from the Encoding dropdown list.
- 9. Enter a Description for the template. Both template name and the description are for your internal use only.
- 10. Enter a Subject for the message.
- **11.** Enter the text of the message.
- **12.** If desired, enter merge fields in the template subject and text body. When you send an email, these fields are replaced with information from your records.
- 13. Click Save.



Tip: View a sample of the template populated with data from records you choose and send a test email by clicking **Send Test** and **Verify Merge Fields**.

Add Attachments to Templates

To add an attachment to a template:

- 1. Do one of the following:
 - If you have permission to edit public templates, from Setup, enter *Email Templates* in the Quick Find box, then select **Email Templates**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: All Editions

Mass email not available in:

Personal, Contact Manager, and **Group**Editions

HTML and Visualforce email templates not available in:

Personal Edition

USER PERMISSIONS

To create or change public email template folders:

- If you don't have permission to edit public templates, go to your personal settings. Enter *Templates* in the Quick Find box, then select **Email Templates** or **My Templates**—whichever one appears.
- 2. Select a template.
- **3.** Click **Attach File** from the email template detail page.
- **4.** Choose a folder and click the document name, or search for a document by clicking **Search in Documents** and entering the file name.

Alternatively, click **My Computer** to attach a file from your computer.

The attached file is included in every email that uses the template. Attachments in mass emails are sent as links rather than as files (see Send Mass Email in Salesforce Classic).



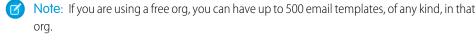
Note: Text email templates can be used, but not created, in Lightning Experience.

SEE ALSO:

Email Templates in Salesforce Classic

Create Custom HTML Email Templates in Salesforce Classic

You can create custom HTML email templates without using letterhead. If you don't know HTML, you can paste HTML code into your template.



- **1.** Do one of the following:
 - If you have permission to edit public templates, from Setup, enter *Email Templates* in the Quick Find box, then select **Classic Email Templates**.
 - If you don't have permission to edit public templates, go to your personal settings. Enter Templates in the Quick Find box, then select Email Templates or My Templates—whichever one appears.
- 2. Click New Template.
- 3. Choose Custom (without using Letterhead) and click Next.
- **4.** Choose a folder in which to store the template.
- 5. To make the template available for use, select the Available For Use checkbox.
- 6. Enter a name in Email Template Name.
- 7. If necessary, change the Template Unique Name. This unique name refers to the component when you use the Lightning Platform API. In managed packages, this unique name prevents naming conflicts in package installations. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. With the Template Unique Name field, you can change certain components' names in a managed package and the changes are reflected in a subscriber's organization.
- 8. If desired, choose a different character set from the Encoding drop-down list.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **All** Editions, except **Personal**

Mass email not available in: **Personal, Contact Manager**, and **Group** Editions

HTML and Visualforce email templates not available in: **Personal** Edition

USER PERMISSIONS

To create or change custom HTML email templates:

Edit HTML Templates

To create or change public email template folders:

- **9.** Enter a Description for the template. Both template name and the description are for your internal use only. The description is used as the title of any email activities you log when sending mass email.
- 10. Click Next.
- 11. Enter a Subject for the message.
- 12. Enter the HTML source text for the message. Include all the HTML tags.
 - Note: If you are including an image, we recommend uploading it to the Documents tab. Then you can reference the copy of the image on our server. For example:

<img src="https://yourInstance.salesforce.com/servlet/servlet.ImageServer?
id=015D0000000Dpwc&oid=00DD0000000FHaG&lastMod=1270576568000"/>

- **13.** If desired, enter merge fields in the template subject and body. When you send an email, these fields are replaced with information from your lead, contact, account, opportunity, case, or solution.
- 14. Click Next.
- **15.** If desired, enter the text-only version of your email or click **Copy text from HTML version** to automatically paste the text from your HTML version without the HTML tags. The text-only version is available to recipients who can't view HTML emails.
 - Warning: We recommend that you leave the text-only version blank. If you leave it blank, Salesforce automatically creates the text-only content based on the current HTML version. If you enter content manually, subsequent edits to the HTML version aren't reflected in the text-only version. When left blank, the text-only content is automatically created when sending an email via the UI. If you use that same template to send email via the API or APEX, you must provide the text-only content. Remember to update text-only content when you change the HTML content.

16. Click Save.

- Tip: View a sample of the template populated with data from records you choose and send a test email by clicking **Send Test** and **Verify Merge Fields**.
- Note: You can't modify the content of a custom HTML template when you use it in an email.

SEE ALSO:

Create Letterhead Email Templates in Salesforce Classic Create Visualforce Email Templates in Salesforce Classic Add Images to Email Templates in Salesforce Classic Personalize Your Salesforce Experience

Add Images to Email Templates in Salesforce Classic

You can include images, such as logos, in your custom HTML and Visualforce email templates.

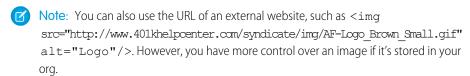
Using Image Tags

When creating custom HTML or Visualforce templates, use an img tag to reference the image. We recommend uploading the images to the Documents tab and referencing the copy of the image on the Salesforce server.



Note: For HTML with letterhead email templates, logos or images come from the letterhead you choose when creating the email template.

- 1. Add an image to the Documents tab.
- 2. On the Documents home page, open the image by clicking its name.
- **3.** Right-click the image and get its reusable URL address. When you use the URL, you reference the copy of the image on the Salesforce server.
- **4.** Open your custom HTML or Visualforce template.
- **5.** Place the HTML tag , using the image's URL address, where you want to insert the image in the email template.



Example: Custom HTML (Without Letterhead) Email Template

<img

src="https://yourInstance.salesforce.com/servlet/servlet.ImageServer?
id=015D0000000Dpwc&oid=00DD0000000FHaG&lastMod=1270576568000"/>

Example: Visualforce Email Template

<apex:image id="Logo"
value="https://yourInstance.salesforce.com/servlet/servlet.ImageServer?
id=015D0000000Dpwc&oid=00DD0000000FHaG&lastMod=127057656800"
/>

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: **All** Editions, except **Personal**

HTML and Visualforce email templates not available in: **Personal** Edition

Visualforce Classic email templates can't be used in Lightning Experience

USER PERMISSIONS

To create or change HTML email templates:

Edit HTML Templates

To create or change Visualforce email templates:

Customize Application

To create or change public email template folders:

Manage Public Classic Email Templates

Using the HTML Style Attribute

You can use the style attribute in HTML to add internal and external images to email templates whose HTML elements can be edited.



Example: Custom HTML Email Template

This example adds an image as the background on an HTML element.

SEE ALSO:

Create Letterheads for Email Templates

Letterhead Email Templates in Salesforce Classic

A letterhead defines the logo, page color, and text settings for your HTML email templates. Use letterheads to ensure a consistent look and feel in your company's emails.

To use letterheads, from Setup, enter *Letterheads* in the Quick Find box, then select **Letterheads**.

From the Letterheads list page:

- To view a letterhead, select the name from the list.
- To edit a letterhead, click the name from the list and choose one of the edit options: **Edit Properties** or **Edit Letterhead**.
- To delete a letterhead, click **Del** next to the name. You cannot delete a letterhead that is used
 in any HTML email templates.



Note: Letterhead email templates can be used, but not created, in Lightning Experience.

Create Letterheads for Email Templates

Create letterheads as the basis for a consistent look for your HTML email templates. Make letterheads available organization-wide so other users can leverage them in their email templates.

Create Letterhead Email Templates in Salesforce Classic

You can create HTML-based email templates using letterhead. You can't change the layout in an existing template, but you can update the letterhead associated with the template. To create a letterhead email template, you must have at least one active letterhead.

EDITIONS

Available in: Salesforce Classic

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To create or change letterheads:

Manage Letterheads

Create Letterheads for Email Templates

Create letterheads as the basis for a consistent look for your HTML email templates. Make letterheads available organization-wide so other users can leverage them in their email templates.

A letterhead consists of properties and details. The properties are only visible inside your organization; they help users identify a letterhead. The details are applied to an email when using that letterhead. Use the letterhead wizard to create both the properties and details of your letterhead.

1. From Setup, enter Letterheads in the Quick Find box, then select Letterheads.

2. Click New Letterhead.

- To view a letterhead, select the name from the list.
- To edit a letterhead, click the name from the list and choose one of the edit options: Edit Properties or Edit Letterhead.
- To delete a letterhead, click **Del** next to the name. You cannot delete a letterhead that is used in any HTML email templates.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: **All** Editions, except **Personal**

USER PERMISSIONS

To create or change letterheads:

Manage Letterheads

Set Letterhead Properties

- 1. Check Available For Use if you would like users to be able to use the new letterhead immediately.
- 2. Enter a Letterhead Label. The label is used to refer to the letterhead on user interface pages.
- 3. If necessary, change the Letterhead Unique Name. This is a unique name used to refer to the component when using the Lightning Platform API. In managed packages, this unique name prevents naming conflicts on package installations. A developer can change certain components' names in a managed package and the changes are reflected in a subscriber's organization. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
- **4.** Enter a description for this letterhead. The name and description fields are for internal use only, to describe the letterhead to other users.
- **5.** Click **Save**. The letterhead detail page appears.

Set Letterhead Details

- 1. Set the attributes for the letterhead.
 - Click **Edit Background Color**, and enter a color for the background of your letterhead. Click the color picker button to choose a color.
 - Click Edit Header Properties, and select the color, alignment, and height for the top section of the letterhead.
 - Click **Select Logo** to include an image of your company logo in the top or bottom section of the letterhead.



Note: You must upload the logo image to the Documents tab before you can add it to the letterhead. Make sure the document is marked as an Externally Available Image so it is visible to non-Salesforce users when it is received in an email. For more information, see "Upload and Replace Items on the Documents Tab" in the Salesforce Help.

To select an image, choose a folder, and click the document name to attach the document. Alternatively, click **Search in Documents**, and enter the file name to search for documents by name.

- Click **Remove Logo** to delete the image from the letterhead.
- Click **Edit Top Line**, and enter a color and height for a horizontal line below the header. Click the color picker button to choose a color.
- Click Edit Body Colors, and enter the background color for the main body of your letterhead.

- Click **Edit Middle Line**, and enter a color and height for the middle border in your letterhead. Click the color picker button to choose a color.
- Click **Edit Footer Properties**, and select a color, alignment, and height for the bottom section of the letterhead.
- Click **Edit Bottom Line**, and select a color and height of a bottom horizontal line. Click the color picker button to choose a color.
- **2.** Optionally, click **Preview** to display the letterhead in a separate browser window.
- 3. Click Save.

To create an HTML email template that contains the settings in your letterhead, see Create Letterhead Email Templates in Salesforce Classic on page 310.



Note: Letterhead email templates can be used, but not created, in Lightning Experience.

SEE ALSO:

Create Custom HTML Email Templates in Salesforce Classic

Create Letterhead Email Templates in Salesforce Classic

You can create HTML-based email templates using letterhead. You can't change the layout in an existing template, but you can update the letterhead associated with the template. To create a letterhead email template, you must have at least one active letterhead.



Note: If you are using a free org, you can have up to 500 email templates, of any kind, in that org.

To create a letterhead email template:

- 1. Do one of the following:
 - If you have permission to edit public templates, from Setup, enter *Email Templates* in the Quick Find box, then select **Classic Email Templates**.
 - If you don't have permission to edit public templates, go to your personal settings. Enter Templates in the Quick Find box, then select Email Templates or My Templates—whichever one appears.
- **2.** Click **New Template**.
- 3. Choose HTML (using Letterhead) and click Next.
- **4.** Choose a folder in which to store the template.
- **5.** To make the template available for use, select the Available For Use checkbox.
- 6. Enteran Email Template Name.
- 7. If necessary, change the Template Unique Name. This unique name refers to the component when you use the Lightning Platform API. In managed packages, this unique name prevents naming conflicts in package installations. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. With the Template Unique Name field, you can change certain components' names in a managed package and the changes are reflected in a subscriber's organization.

8. Select a Letterhead. The letterhead determines the logo, page color, and text settings of your email.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: **All** Editions, except **Personal**

Mass email not available in:

Personal, Contact

Manager, and Group

Editions

HTML and Visualforce email templates not available in: **Personal** Edition

USER PERMISSIONS

To create or change HTML email templates:

Edit HTML Templates

To create or change public email template folders:

- 9. Select the Email Layout. The email layout determines the columns and page layout of the message text. To see samples, click View Email Layout Options.
 - ? Tip: In an existing template, you can't change this field. To use a different email layout after you've created a template, create another template.
- 10. If desired, choose a different character set from the Encoding drop-down list.
- 11. Enter a Description of the template. Both template name and description are for your internal use only. The description is used as the title of any email activities you log when sending mass email.
- 12. Click Next.
- **13.** Enter a subject for the email you send. This can be edited later, when using the template.
- **14.** Enter the text of the message by clicking any section and entering text. To prevent anyone using the template from editing a section, click the padlock icon.
- **15.** Change the style of your text by selecting the text and using the format toolbar.
- **16.** If desired, enter merge fields in the template subject and body. When you send an email, these fields are replaced with information from your lead, contact, account, opportunity, case, or solution.
- 17. Click Next.
- **18.** If desired, enter the text-only version of your email or click **Copy text from HTML version** to automatically paste the text from your HTML version without the HTML tags. The text-only version is available to recipients who can't view HTML emails.
 - Warning: We recommend that you leave the text-only version blank. If you leave it blank, Salesforce automatically creates the text-only content based on the current HTML version. If you enter content manually, subsequent edits to the HTML version aren't reflected in the text-only version. When left blank, the text-only content is automatically created when sending an email via the UI. If you use that same template to send email via the API or APEX, you must provide the text-only content. Remember to update text-only content when you change the HTML content.
- 19. Click Save.
- ? Tip: View a sample of the template populated with data from records you choose and send a test email by clicking **Send Test and Verify Merge Fields**.
- Note: HTML email templates can be used, but not created, in Lightning Experience.

SEE ALSO:

Create Custom HTML Email Templates in Salesforce Classic Create Visualforce Email Templates in Salesforce Classic Add Images to Email Templates in Salesforce Classic Create Letterheads for Email Templates

Visualforce Email Templates in Salesforce Classic

With Visualforce email templates, users can send targeted and personalized emails. Template creators can harness the powerful Visualforce programming language to create templated email content.

Key capabilities of Visualforce email templates include:

- Dynamic content based on Salesforce data such as recipient location or type
- Multilingual support
- Access to Salesforce data in addition to primary recipient or related record information
- Dynamic attachments (like csv files, pdf files, and iCal invites) based on Salesforce data

Create Visualforce Email Templates in Salesforce Classic

Use the Visualforce programming language to create targeted and personalized email content.

Use Merge Fields for Visualforce Email Templates in Salesforce Classic

A merge field is a field you can put in an email template, mail merge template, custom link, or formula to incorporate values from a record.

Manage Version Settings for Visualforce Email Templates in Salesforce Classic

To aid backwards-compatibility, each Visualforce email template is saved with version settings for the specified version of Visualforce and the API. If the Visualforce email template references installed managed packages, the version settings for each managed package referenced by the Visualforce component are saved too. Saving version settings ensures that as Visualforce,

EDITIONS

Available in: Salesforce Classic

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To create or change Visualforce email templates:

Customize Application

To create or change public email template folders:

 Manage Public Classic Email Templates

the API, and the components in managed packages evolve in subsequent versions, a Visualforce email template is still bound to versions with specific, known behavior.

Create Visualforce Email Templates in Salesforce Classic

Use the Visualforce programming language to create targeted and personalized email content.



Note: If you are using a free org, you can have up to 500 email templates, of any kind, in that org.

- **1.** Do one of the following:
 - If you have permission to edit public templates, from Setup, enter *Email Templates* in the Quick Find box, then select **Classic Email Templates**.
 - If you don't have permission to edit public templates, go to your personal settings. Enter Templates in the Quick Find box, then select Email Templates or My Templates—whichever one appears.

2. Click New Template.

Choose Visualforce and click Next.You can't send a mass email using a Visualforce email template.

- **4.** Choose a folder in which to store the template.
- 5. To make the template available for use, select the Available For Use checkbox.
- 6. Enter a name in Email Template Name.
- 7. If necessary, change the Template Unique Name. This unique name refers to the component when you use the Lightning Platform API. In managed packages, this unique name prevents naming conflicts in package installations. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. With the Template Unique Name field, you can change certain components' names in a managed package and the changes are reflected in a subscriber's organization.
- **8.** If desired, choose a different character set from the Encoding dropdown list.
- 9. Enter a description for the template. Both template name and description are for your internal use only.
- 10. Enter a subject line for your template in Email Subject.
- 11. In the Recipient Type dropdown list, select the type of recipient to receive email created from the template.
- 12. If desired, in the Related To Type dropdown list, select the object from which the template retrieves merge field data.
- 13. Click Save.
- **14.** On the View and Edit Email Templates in Salesforce Classic page, click **Edit Template**.
- **15.** Enter markup text for your Visualforce email template.
 - Note: Karaman in abadian an incana an anana

Note: If you are including an image, we recommend uploading it to the Documents tab to reference the copy of the image on our server. For example:

```
<apex:image id="Logo"
value="https://yourInstance.salesforce.com/servlet/servlet.ImageServer?
id=015D0000000Dpwc&oid=00DD0000000FHaG&lastMod=127057656800" />
```

16. To specify the version of Visualforce and the API used with this email template, click **Version Settings**. If you've installed managed packages from the AppExchange, you can also specify which version of each managed package to use with this email template. Generally, use the default value for all versions, to associate the email template with the most recent version of Visualforce, the API,

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: **Group**, **Enterprise**, **Performance**, **Unlimited**, **Developer**, and **Contact Manager** Editions

Mass email not available in:

Personal, Contact Manager, and **Group**Editions

USER PERMISSIONS

To create or change Visualforce email templates:

Customize Application

To create or change public email template folders:

and each managed package. To maintain specific behavior, you can specify an older version of Visualforce and the API. To access components or functionality that differ from the most recent package version, you can specify an older version of a managed package.

- **17.** To view the details of the template, click **Save**. To continue editing your template, click **Quick Save**. Your Visualforce markup must be valid before you can save your template.
 - Note: The maximum size of a Visualforce email template is 1 MB.

You can't send a mass email using a Visualforce email template. The {!Receiving_User.field_name} and {!Sending_User.field_name} merge fields work only for mass email and list email and are unavailable in Visualforce email templates.

① Tip:

- View a sample of the template populated with data from records you choose and send a test email by clicking **Send Test and Verify Merge Fields**. If the email template includes encrypted data, remember that the data is displayed as encrypted within the generated email and in the Visualforce template page. For security reasons, it isn't displayed in plain text.
- To translate Visualforce email templates based on recipients' or related objects' languages, use the <messaging:emailTemplate> tag's language attribute (valid values: Salesforce supported language keys, for example, "en-US"). The language attribute accepts merge fields from the email template's recipientType and relatedToType attributes. You create custom language fields for use in the merge fields. The Translation Workbench is required to translate email templates.
- Note: You can't send a mass email using a Visualforce email template.

SEE ALSO:

Create Letterhead Email Templates in Salesforce Classic Create Custom HTML Email Templates in Salesforce Classic Create Text Email Templates in Salesforce Classic Developer's Guide: Visualforce Developer's Guide

Use Merge Fields for Visualforce Email Templates in Salesforce Classic

A merge field is a field you can put in an email template, mail merge template, custom link, or formula to incorporate values from a record.

Syntax and Formatting

Merge fields for Visualforce email templates use the same expression language as formulas:

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: **Group**, **Enterprise**, **Performance**, **Unlimited**, **Developer**, and **Contact Manager** Editions

Mass email not available in:

Personal, Contact Manager, and **Group**Editions

USER PERMISSIONS

To set version settings for Visualforce email templates:

Customize Application

{!Object Name.Field Name}

For example, you can start your email template with Hello, {!Contact.FirstName}. When you send the template, each recipient sees their first name in place of the merge field. If your recipient's first name is John, he sees Hello, John! when he opens the email.

Tips

- You can't send a mass email using a Visualforce email template. {!Receiving_User.field_name} and
 {!Sending_User.field_name} are used for mass email and aren't available for Visualforce email templates.
- To translate Visualforce email templates based on recipients' or related objects' languages, use the
 <messaging:emailTemplate> tag's language attribute. Valid values are Salesforce-supported language keys, such as
 "en-us" for English (US). The language attribute accepts merge fields from the email template's recipientType and
 relatedToType attributes. You create custom language fields for use in the merge fields. The Translation Workbench is required
 to translate email templates.

SEE ALSO:

Create Visualforce Email Templates in Salesforce Classic Developer's Guide: Visualforce Developer's Guide

Manage Version Settings for Visualforce Email Templates in Salesforce Classic

To aid backwards-compatibility, each Visualforce email template is saved with version settings for the specified version of Visualforce and the API. If the Visualforce email template references installed managed packages, the version settings for each managed package referenced by the Visualforce component are saved too. Saving version settings ensures that as Visualforce, the API, and the components in managed packages evolve in subsequent versions, a Visualforce email template is still bound to versions with specific, known behavior.

A package version is a number that identifies the set of components uploaded in a package. The version number has the format <code>majorNumber.minorNumber.patchNumber</code> (for example, 2.1.3). The major and minor numbers increase to a chosen value during every major release. The <code>patchNumber</code> is generated and updated only for a patch release. Publishers can use package versions to evolve the components in their managed packages gracefully by releasing subsequent package versions without breaking existing customer integrations using the package.

To set the Salesforce API and Visualforce version for an existing Visualforce email template:

- 1. Do one of the following:
 - If you have permission to edit public templates, from Setup, enter *Email Templates* in the Quick Find box, then select **Classic Email Templates**.
 - If you don't have permission to edit public templates, go to your personal settings. Enter Templates in the Quick Find box, then select Email Templates or My Templates—whichever one appears.
- 2. Click the Email Template Name for the Visualforce email template.
- **3.** Click **Edit Template** and then click **Version Settings**.
- 4. Select the Version of the Salesforce API. The API version is also the version of Visualforce used with this template.
- 5. Click Save.

To configure the package version settings for a Visualforce email template:

- 1. Do one of the following:
 - If you have permission to edit public templates, from Setup, enter *Email Templates* in the Quick Find box, then select **Classic Email Templates**.
 - If you don't have permission to edit public templates, go to your personal settings. Enter *Templates* in the Quick Find box, then select **Email Templates** or **My Templates**—whichever one appears.
- 2. Click the Email Template Name for the Visualforce email template.
- **3.** Click **Edit Template** and then click **Version Settings**.
- 4. Select a Version for each managed package referenced by the Visualforce email template. This version of the managed package is used by the Visualforce email template if later versions of the managed package are installed, unless you manually update the version setting. To add an installed managed package to the settings list, select a package from the list of available packages. The list is only displayed if you have an installed managed package that is not already associated with the Visualforce email template.
- 5. Click Save.

Note the following when working with package version settings:

• If you save a Visualforce email template that references a managed package without specifying a version of the managed package, the Visualforce email template is automatically associated with the latest installed version of the managed package.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: **Group**, **Enterprise**, **Performance**, **Unlimited**, **Developer**, and **Contact Manager** Editions

Mass email not available in: **Personal, Contact Manager**, and **Group** Editions

USER PERMISSIONS

To set version settings for Visualforce email templates:

Customize Application

Sales Productivity Lightning Dialer

• If a Visualforce email template references a managed package, you can't remove the email template's version setting for the managed package.

SEE ALSO:

Create Visualforce Email Templates in Salesforce Classic

Lightning Dialer

Use Lightning Dialer to access telephony features without ever leaving Salesforce. Make and receive calls, add call notes, and log call information with ease. It just takes a single click from phone number fields in Lightning Experience, such as numbers on contacts, leads, and list views.

Guidelines for Making and Receiving Calls

Review guidelines for making and receiving calls, including basic calling features and tips on how to get started.

Set Up Lightning Dialer

Dialer allows users to access telephony features directly in Salesforce.

EDITIONS

Available in: Lightning Experience

Available in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

Lightning Dialer is available for an additional cost as an add-on license.

Guidelines for Making and Receiving Calls

Review guidelines for making and receiving calls, including basic calling features and tips on how to get started.



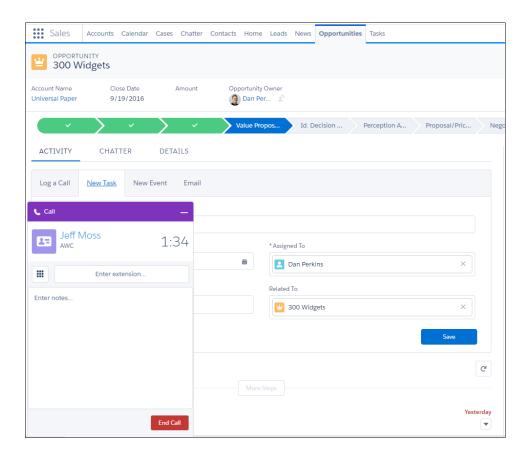
Note: For now, we support outgoing calls to the United States and Canada only.

EDITIONS

Available in: Lightning Experience

Available in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

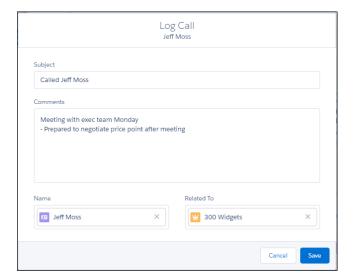
Lightning Dialer is available for an additional cost as an add-on license.



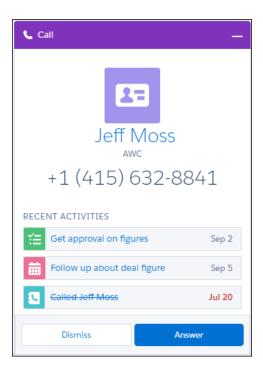
The call appears in the utility bar at the bottom of your screen, so you can multitask while you're on a call. You can access relevant records, add call notes directly in the call panel, or create tasks, events, or other records related to the call.

? Tip: Assign a Dialer number so the calls you make don't appear to be coming from an unknown number.

Select **Auto-log** to have call details added to the activity timeline automatically. You can also add more details manually after a call has ended.



Optionally, you can also receive calls with Dialer. Incoming calls show a list of related activities, so you have access to relevant information before you've even answered the call.



If you don't answer within 30 seconds or dismiss the call, the call ends. If you're not on Lightning Experience when someone calls, the person calling hears a message that you're not available. If voicemail is enabled in your org, you can also receive and store up to 20 voicemail messages.

For information about setting up Lightning Dialer, see "Set Up Lightning Dialer" in the Salesforce Help.

Assign a Dialer Number

Assign a Dialer number from your personal settings so the calls you make and receive don't appear to be coming from an unknown number.

Assign a Forwarding Number for Dialer

Get your Dialer calls forwarded to your mobile phone or main business line so you never miss a call. You can easily assign a forwarding number from your personal settings.

Lightning Dialer Best Practices

For the best calling experience, use a hardwired connection to your network with adequate bandwidth, use a wired headset, and set up the proper environment on your machine.

SEE ALSO:

Set Up Lightning Dialer

Assign a Dialer Number

Assign a Dialer number from your personal settings so the calls you make and receive don't appear to be coming from an unknown number.

- 1. From your personal settings, enter *Dialer Settings* in the Quick Find box, then select **Dialer Settings**.
- 2. Click Find Now.
- **3.** Select your country and enter an area code to display a list of available numbers. Phone numbers are subject to availability, and numbers from all area codes may not be available.
- **4.** Select a number.

 Once you assign yourself a number, you can't choose a new one or view available numbers.
- 5. Click Save.

SEE ALSO:

Guidelines for Making and Receiving Calls Assign a Forwarding Number for Dialer Lightning Dialer Best Practices

EDITIONS

Available in: Lightning Experience

Available in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

Lightning Dialer is available for an additional cost as an add-on license.

USER PERMISSIONS

To add the minutes related to Dialer calls:

Access Dialer Minutes

To make outbound Dialer calls:

 Access Dialer Outbound Calls

To receive inbound Dialer calls:

Access Dialer Inbound Calls

Assign a Forwarding Number for Dialer

Get your Dialer calls forwarded to your mobile phone or main business line so you never miss a call. You can easily assign a forwarding number from your personal settings.

When enabled, you receive calls simultaneously in your browser and on your forwarding number.

- 1. From your personal settings, enter *Dialer Settings* in the Quick Find box, then select **Dialer Settings**.
- 2. Select Enable calls to my forwarding number.
- **3.** Enter your forwarding phone number.
- 4. Click Save.

SEE ALSO:

Guidelines for Making and Receiving Calls Assign a Dialer Number Lightning Dialer Best Practices

EDITIONS

Available in: Lightning Experience

Available in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

Lightning Dialer is available for an additional cost as an add-on license.

USER PERMISSIONS

To add the minutes related to Dialer calls:

Access Dialer Minutes

To make outbound Dialer calls:

 Access Dialer Outbound Calls

To receive inbound Dialer calls:

Access Dialer Inbound Calls

Lightning Dialer Best Practices

For the best calling experience, use a hardwired connection to your network with adequate bandwidth, use a wired headset, and set up the proper environment on your machine.

Use a Good Connection

A wireless connection can work, but a hardwired connection is strongly recommended.

Having a dedicated network for your Dialer calls is best. We recommend having at least 10 kbps per Dialer session available, but having 500 kbps+ per Dialer session is optimal. Limiting the number of applications you have running (especially screen-sharing applications) and your open browser tabs also improves performance.



Note: Using a network that masks your location may cause charges to be different from those displayed for your location.

Also make sure you're using the most up-to-date Chrome, Firefox, or Edge browser.

EDITIONS

Available in: Lightning Experience

Available in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

Lightning Dialer is available for an additional cost as an add-on license.

Make Calls with a Quality Headset

A wired USB headset works best. Wireless or mobile phone earbuds will work, but you may experience issues with call quality.

SEE ALSO:

Guidelines for Making and Receiving Calls Assign a Dialer Number Assign a Forwarding Number for Dialer

Set Up Lightning Dialer

Dialer allows users to access telephony features directly in Salesforce.

To use Dialer in your org:

1. Dialer Prerequisites

Plan out your implementation before enabling Dialer in your organization.

2. Dialer Limitations

Be aware of the limitations that apply to Lightning Dialer.

3. Enable Lightning Dialer

Turn on Dialer from the Dialer Settings page in Lightning Experience.

4. Add Dialer to the Utility Bar

Use the App Manager to make Dialer available from the utility bar at the bottom of the page. The utility bar gives your sales reps quick access to commonly used tools.

5. Assign the Dialer Permission Set to Users

Assign the Dialer licenses to users from Setup.

6. Enable Local Presence

Show local numbers when calling customers with Lightning Dialer. Enable the feature from the Local Presence page in Setup.

7. Enable Call Monitoring

Use Call Monitoring to coach sales reps using Lightning Dialer. Enable the feature from the Dialer Settings page in Setup, then create a permission set with the Access Dialer Monitoring permission and assign it to managers.

8. How Do I Manage Dialer Usage?

See your org's Dialer usage from Setup.

SEE ALSO:

Guidelines for Making and Receiving Calls

EDITIONS

Available in: Lightning Experience

Available in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

Lightning Dialer is available for an additional cost as an add-on license.

Dialer Prerequisites

Plan out your implementation before enabling Dialer in your organization.

The supported browsers for Dialer include the most recent versions of Chrome, Firefox, and Edge.

Make sure your browser allows Web Real-Time Communication (WebRTC). This should be enabled by default, but if your teams are using Edge, make sure the **Hide my local IP address over WebRTC connections** option in the about:flags menu is not selected.

Having a dedicated network for your Dialer calls is best. We recommend having at least 10 kbps per Dialer session available, but having 500 kbps+ per Dialer session is optimal. For more information about Dialer's network requirements, see Lightning Dialer Network Requirements.

To use the Voicemail Drop feature, content deliveries need to be enabled for your org. From Setup, enter *Content Deliveries* in the Quick Find box. Then select **Content Deliveries and Public Links**. Ensure that the **Content Deliveries feature can be enabled for users** setting is selected. If you don't see the setting available, contact Salesforce Customer Support.



Note: Dialer should not be assigned to users already using Open CTI.

To disable Open CTI for users, from Setup, enter *Users* in the Quick Find box, then select **Users**. Then deselect the Call Center field for Dialer users.

If your org has record types enabled for tasks, you need to assign the Log a Call quick action to a specific record type in order to log calls.

Before beginning the implementation process, Salesforce must enable Dialer permissions and provision Dialer licenses for your organization. Your Salesforce contact coordinates it with you, but you can check if your organization has available Dialer licenses. In Setup, enter Company Information in the Quick Find box, then select Company Information, and check for Dialer Outbound User and Dialer Inbound User under Permission Set Licenses.

For information about using Dialer in a sandbox environment, see Test Dialer Features in Sandbox.

EDITIONS

Available in: Lightning Experience

Available in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

Lightning Dialer is available for an additional cost as an add-on license.

USER PERMISSIONS

To enable Dialer features:

Customize Application

To assign permission sets:

Assign Permission Sets

To manage users:

Manage Users
 AND

Manage Profiles and Permission Sets

Dialer Limitations

Be aware of the limitations that apply to Lightning Dialer.

General Limitations

- Dialer features are available in Lightning Experience on the desktop only.
- Outgoing calls are supported to the U.S. and Canada only.
- Phone numbers in dashboards can't be directly called with Dialer.
- If your org is using the Lightning console split view, phone numbers can't be directly called
 unless users navigate to a record detail page. Additionally, the Add to Call List action isn't
 available from a split view.

Phone Number Limitations

- Phone numbers are subject to availability, and numbers from all area codes may not be available.
- Every inbound license is allowed one dedicated number. To change it, an admin can release the number, and the Dialer user can then reassign themselves another number. Admins can release and replace, at most, a single number for each user each month.

EDITIONS

Available in: Lightning Experience

Available in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

Lightning Dialer is available for an additional cost as an add-on license.

Enable Lightning Dialer

Turn on Dialer from the Dialer Settings page in Lightning Experience.

- From Setup, enter Dialer Settings in the Quick Find box, then select Dialer Settings.
- 2. Enable Dialer.

Optionally, enable personal voicemail, prioritized call lists, and voicemail drop for your org as well.

EDITIONS

Available in: Lightning Experience

Available in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

Lightning Dialer is available for an additional cost as an add-on license

USER PERMISSIONS

To enable Dialer features:

Customize Application

Add Dialer to the Utility Bar

Use the App Manager to make Dialer available from the utility bar at the bottom of the page. The utility bar gives your sales reps quick access to commonly used tools.

- 1. From Setup, enter App Manager in the Quick Find box, then select App Manager.
- **2.** Edit an existing Lightning app or click **New Lightning App**. You can also upgrade a custom Classic app to a Lightning app.

If available, the Lightning Sales app contains numerous options preconfigured for sales users.

- **3.** On the Utility Bar tab, click **Add** and select **Dialer**.
- **4.** On the Assign to User Profiles tab, make the app available to relevant user profiles.
- **5.** Verify the other app details, including the app name, branding information, and available menu items.
- **6.** Save your changes.

To verify your changes, click the App Launcher and select the app that has Lightning Dialer enabled.

EDITIONS

Available in: Lightning Experience

Available in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

Lightning Dialer is available for an additional cost as an add-on license.

USER PERMISSIONS

To enable Dialer features:

Customize Application

Assign the Dialer Permission Set to Users

Assign the Dialer licenses to users from Setup.

- 1. From Setup, enter Users in the Quick Find box, then select Users.
- 2. Select a user.
- 3. In the Permission Set Assignments related list, click **Edit Assignments**.
- **4.** Assign the Dialer Outbound and (if available) Dialer Inbound permission sets.
- 5. Click Save.
- **6.** Repeat the process for other users you want to grant Dialer access to.

 The number of permission sets you can assign is limited by the number of feature licenses you've purchased.

EDITIONS

Available in: Lightning Experience

Available in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

Lightning Dialer is available for an additional cost as an add-on license

USER PERMISSIONS

To assign permission sets:

Assign Permission Sets

Enable Local Presence

Show local numbers when calling customers with Lightning Dialer. Enable the feature from the Local Presence page in Setup.

Users need both Dialer Inbound and Dialer Outbound licenses to use Local Presence.



- 1. From Setup, enter *Local Presence* in the Quick Find box, then select **Local Presence**.
- 2. Enable Local Presence.
- **3.** Enter a default callback number so returned calls always reach your organization, even in the initial caller is no longer with your organization.

EDITIONS

Available in: Lightning Experience

Available in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

Lightning Dialer is available for an additional cost as an add-on license.

USER PERMISSIONS

To enable Dialer features:

Customize Application

Enable Call Monitoring

Use Call Monitoring to coach sales reps using Lightning Dialer. Enable the feature from the Dialer Settings page in Setup, then create a permission set with the Access Dialer Monitoring permission and assign it to managers.

Your org must have role hierarchy set up to use Call Monitoring

- 1. From Setup, enter Dialer Settings in the Quick Find box, then select Dialer Settings.
- 2. Enable Call Monitoring.
- 3. From Setup, enter Permission Sets in the Quick Find box, then select Permission Sets.
- 4. Click New.
- Enter a name for the permission set.Naming it Call Monitoring makes it easy to identify.
- 6. Click Save.
- 7. Click App Permissions.
- 8. Click Edit.
- 9. Select Access Dialer Monitoring.
- 10. Click Save.
- **11.** From Setup, enter *Users* in the Quick Find box, then select **Users**.
- 12. Select a manager who you want to grant Call Monitoring to.
- 13. In the Permission Set Assignments related list, click Edit Assignments.
- **14.** Assign the Call Monitoring permission set.
- 15. Click Save.
- **16.** Repeat steps 12–15 for other managers you want to grant Call Monitoring access to.

How Do I Manage Dialer Usage?

See your org's Dialer usage from Setup.

From Setup, enter Usage Report in the Quick Findbox, then select Usage Report.

The page displays your org's total minutes used this month and last month. You can view usage by date, and also sort and filter the usage data.

Release a Dialer Number

Release a number from the Number Management page in Setup.

Test Dialer Features in Sandbox

Test Dialer in a sandbox environment by re-enabling the feature in a full sandbox org. Calls placed in a sandbox are test calls, and phone numbers aren't actually dialed.

Lightning Dialer Troubleshooting Tips

Make sure your environment is set up to use Dialer, and you have the most recent version of Chrome, Firefox, or Edge.

EDITIONS

Available in: Lightning Experience

Available in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

Lightning Dialer is available for an additional cost as an add-on license

USER PERMISSIONS

To enable Dialer features:

Customize Application

EDITIONS

Available in: Lightning Experience

Available in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

Lightning Dialer is available for an additional cost as an add-on license.

Release a Dialer Number

Release a number from the Number Management page in Setup.

Once you release a number, it can't be recovered. You can still access calling data, but you can't make calls with the number. Admins can release, at most, a single number for each user each month.

Reassigning a number to another user is not yet supported.

 From Setup, enter Number Management in the Quick Find box, then select Number Management.

- 2. Click next to a number.
- 3. Click Release.

EDITIONS

Available in: Lightning Experience

Available in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

Lightning Dialer is available for an additional cost as an add-on license.

USER PERMISSIONS

To enable Dialer features:

Customize Application

Test Dialer Features in Sandbox

Test Dialer in a sandbox environment by re-enabling the feature in a full sandbox org. Calls placed in a sandbox are test calls, and phone numbers aren't actually dialed.

If you have an org with Dialer enabled, you can test some Dialer features in a sandbox environment. You can place fake outbound calls in sandbox. Inbound calls are not supported.

- 1. Create a full sandbox of your Dialer org.
- 2. Log in to your sandbox.
- From Setup, enter Dialer Settings in the Quick Find box, then select Dialer Settings.
- 4. Toggle the Dialer setting off, then back on again.
- 5. Finish setting up Dialer in your sandbox org.

If you haven't finished setting up Dialer, this includes adding Dialer to the utility bar, creating a Dialer permission set, and assigning the permission set to users.

Note: When selecting phone numbers in sandbox, each user can choose from the same list of dummy numbers. An error may occur if multiple users are assigned to the same phone number.

EDITIONS

Available in: Lightning Experience

Available in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

Lightning Dialer is available for an additional cost as an add-on license.

USER PERMISSIONS

To enable Dialer features:

Customize Application

To view a sandbox:

 View Setup and Configuration

To create, refresh, activate, and delete a sandbox

Manage Sandbox

Lightning Dialer Troubleshooting Tips

Make sure your environment is set up to use Dialer, and you have the most recent version of Chrome, Firefox, or Edge.

Problem Potential Solutions I can't make a call. Make sure you have a network connection. Make sure you've granted your browser permission to access your microphone. Check that Dialer is properly set up in your org. For more information about initial set up, see "Dialer Prerequisites" in the Salesforce Help. The audio is dropping Check the quality of your network connection. It's best to use a in-and-out of my call. high speed or separate network for calling activity, or to prioritize Dialer traffic on your network. I'm getting one-way audio Make sure your microphone and speaker are attached and (on either end). enabled, and that your microphone isn't muted. Check that you have opened the correct ports in your computer and network firewalls. The audio quality is poor on Use a wired USB headset over wireless or mobile headphones. my call. Try to reduce the noise in your area, and take calls in a quiet location. Adjust the microphone and speaker volume settings. If you're using a wireless connection, switch to a hardwired connection with adequate bandwidth. Turn off or disconnect other devices that may be using up bandwidth on your network. Close extra applications and browser tabs to make sure your computer has enough resources to make a quality call. Your network connectivity is poor, or your connection is being I'm seeing an Internal Consistency Evaluator (ICE) blocked by a firewall. Check your connection and try again. It may error: ICE negotiation with help to restart your browser or system. If the problem persists, Twilio failed contact your network administrator.

EDITIONS

Available in: Lightning Experience

Available in: Essentials, Professional, Enterprise, Performance, and Unlimited Editions

Lightning Dialer is available for an additional cost as an add-on license.

Sales Productivity News

News

Get instant access to relevant, timely news about customers, partners, competitors, and industries you work with. The News component includes articles from the past 30 days, and is available on business accounts, contacts, leads, and the Home page. News is available from US news sources in English.

Guidelines for Using News

Review guidelines for News, including which articles are shown, categories for news, and privacy and security information.

Enable News

Give your sales reps instant access to relevant, timely news about customers, partners, and competitors. News appears on business accounts, contacts, leads, and the Home page. It's likely that News is already enabled for you, but you can turn it off if you want.

Guidelines for Using News

Review guidelines for News, including which articles are shown, categories for news, and privacy and security information.

News Based on Wherever You Access It

| When news is accessed from | News items are based on |
|----------------------------|---|
| Accounts | The account, its executives, and its industry. |
| Contacts and leads | The record's related account, and that account's executives and industry. |
| Home page and News app | Recently viewed records, and tasks and events for those records. |
| The Salesforce app | Same as on desktop, plus recently viewed records, and tasks and events for those records. |

EDITIONS

Available in: Lightning Experience

Available in: Essentials, Group, Professional, Enterprise, Performance, Unlimited Editions

EDITIONS

Available in: Lightning Experience

Available in: Essentials, Group, Professional, Enterprise, Performance, Unlimited Editions

Categories for News

| Category | Includes news |
|------------------------|--|
| Account News | Based on the record's account. |
| Industry News | About the industry that's listed on either the account or the record's related account. |
| Executive News | About individuals who hold executive roles at either the account or the record's related account. The executives don't need to be contacts within Salesforce for you to see news about them. |
| Trending at My Company | That your other users in Salesforce are reading. |

Sales Productivity Guidelines for Using News

| Category | Includes news |
|--|---|
| General Business News (Home page only) | That's not directly related to the record's account, industry, or executives. |

Share News on Chatter

If you come across an interesting news article, easily share it on Chatter. When you share an article from a record's detail page, it's posted to that record's Chatter feed. When you share an article from Home or the News app, it's posted to your Chatter profile for all your followers to see.

News Quality and Feedback

- To get the most relevant news, it's important that account records are complete and accurate. Be sure to include a website. Also,
 the value in the Account Name field should match the company name, so avoid incorrect spellings, special characters, and other
 formatting.
- Salesforce processes all news to ensure it's relevant and free from spam and inappropriate content. If you see inappropriate or incorrect news items, flag them using the feedback options.

Privacy and Security

- When enabled, some of your organization's data may be saved and/or processed by third-party services and other Salesforce
 technologies, each that may offer different privacy and security protections than the Salesforce Services. When data (such as the
 name or website of an account that's being queried) is shared or transferred, we make efforts to exclude your name and your
 organization's name. Salesforce is not responsible for the privacy and security of data that is shared with third parties when you use
 this feature.
- For most accounts, Salesforce provides news from our own news processing platform, which collects news from RSS feeds. On occasion, if a match isn't found in our database, we may search a third-party provider for news specific to your account, using the account name you've listed in Salesforce. In either event, Salesforce is not responsible for the content of news that is provided by third parties. Queries performed by Salesforce are performed using secure protocols and are not linked to individual Salesforce users.

SEE ALSO:

News

Sales Productivity Enable News

Enable News

Give your sales reps instant access to relevant, timely news about customers, partners, and competitors. News appears on business accounts, contacts, leads, and the Home page. It's likely that News is already enabled for you, but you can turn it off if you want.

News is available from US news sources in English.

- 1. Make sure you've allowed the network access needed for News to work.
- From Setup, enter Account Settings in the Quick Find box, then select Account Settings.
- 3. Select Enable News.
- **4.** Make sure the News component is on your page layouts.
 - (1) Important: For default account, contact, and lead pages, News appears in a separate tab within the Tab component. However, for customized pages and all opportunity pages created before Summer '17, News appears as a separate component. To improve the speed at which these pages load, we recommend you move News to a tab within the Tab component.

EDITIONS

Available in: Lightning Experience

Available in: Essentials, Group, Professional, Enterprise, Performance, Unlimited Editions

USER PERMISSIONS

To enable News:

Customize Application

SEE ALSO:

Allow Network Access for News, Account Logos, and Automated Account Fields News

Activities: Tasks, Events, and Calendars

Activities include tasks, events, and calendars. With Salesforce, track tasks and meetings together in lists and reports to easily prioritize your time and keep up with your accounts, campaigns, contacts, leads, and opportunities.

Tasks

Keep your to-do list in Salesforce and stay right on top of your deals and accounts. Easily relate every task to records for leads, contacts, campaigns, contracts, and other information that you need. Salesforce gives you different tools to maximize productivity—quick ways to create and update tasks, prefiltered task lists, and task notification options.

EDITIONS

Available in the Salesforce app, Salesforce Classic, and Lightning Experience

Available in: All Editions

Events and Calendars

Use Salesforce to track meetings with customers, prospects, and colleagues. Drill down from events to related records, feeds, files, contracts, and more. You can also track events in reports.

Things to Know About Activities

Review additional considerations for activities.

Activity Timeline

In Lightning Experience, records don't show the Open Activities and Activity History related lists. Instead, track your activities in the activity timeline, which is supported for accounts, contacts, contracts, leads, opportunities, and activity-enabled custom objects.

Activity Reminders and Notifications

Salesforce displays event and task reminders in a reminder window. The reminder window opens whenever a reminder is triggered. When you log in, a sound plays if you have reminders that have been triggered since the last time you logged in. You can customize reminders in your personal settings.

View Archived Activities

Find and view the activities Salesforce has archived.

Activities Reports

Run standard or custom reports that display details about your tasks or events and their related contacts, accounts, opportunities, and other associated records.

Set Up Activities for Your Sales Reps

Optimize the way that your sales reps can manage events, calendars, and tasks.

SEE ALSO:

Events and Calendars

Tasks

Tasks

Keep your to-do list in Salesforce and stay right on top of your deals and accounts. Easily relate every task to records for leads, contacts, campaigns, contracts, and other information that you need. Salesforce gives you different tools to maximize productivity—quick ways to create and update tasks, prefiltered task lists, and task notification options.

Guidelines for Using Tasks

Review some guidelines for using tasks, including where to track tasks, how task assignment works, and task limits.

Repeat a Task

Use repeating tasks to make a task recur a specified number of days after a trigger that you choose. The next task in the series is created only when the current task is due or marked completed. Repeating tasks are a streamlined alternative to regularly recurring tasks when you don't have to get a task done on a specific day.

Disable Task Notifications in Salesforce Classic

Depending on your Salesforce settings, you may be able to control whether you receive a notification when someone creates or assigns you a task.

Assign Tasks to Multiple People in Salesforce Classic

Assign up to 100 coworkers an independent copy of the same task. For example, you can create a task "Submit your expense reports" with the appropriate due date and assign it to a team of account executives.

Task Fields

Task records have standard fields for tracking and recording task details.

Considerations for Closing and Reopening Tasks

Salesforce Classic differs from Lightning Experience and the Salesforce app in the way it handles validation rules on tasks.

EDITIONS

Available in Lightning Experience, all versions of the Salesforce app, and Salesforce Classic

Available in: **All** Editions except **Personal**

Considerations for Enabling User Control of Emails Notifications for Tasks

When the setting **Enable user control over task assignment notifications** is enabled in Activity Settings, users see the option **Email me when someone assigns me a task** in their personal settings. Both the setting and the option are enabled by default. Enabling and disabling the setting affects users in different ways. Before migrating a Salesforce org, avoid excessive email notifications by disabling the setting. You can re-enable it after migration.

Set Up Tasks for Your Sales Reps

Optimize the way your sales reps manage their work. Options differ for Lightning Experience, Salesforce Classic, and the Salesforce app.

SEE ALSO:

Activities: Tasks, Events, and Calendars Events and Calendars

Guidelines for Using Tasks

Review some guidelines for using tasks, including where to track tasks, how task assignment works, and task limits.

Use Tasks in Lightning Experience to Boost Sales Productivity

General Guidelines

- The Kanban view isn't available when the list view filter is set to Recently Viewed Tasks.
- If a task is created when you send an email, validation and workflow rules for that task aren't triggered.
- Due dates are displayed in the time zone you've selected in your personal settings.
- If your organization has enabled Email-to-Case or On-Demand Email-to-Case, some tasks are associated with Email-to-Case or On-Demand Email-to-Case emails. To view the associated email, click the link at the top of the task.
- Tasks that are emails received via Email to Salesforce or Salesforce for Outlook sometimes display a banner that links to the My Unresolved Items page. Use this page to assign any unassociated emails to related Salesforce records.
- Attachments are displayed on the task detail page only, not on the detail page for other records that the task is related to. If you don't see the Attachments related list on the task detail page, ask your Salesforce admin to add it to the task page layout.
- On cases, feeds don't include email tasks or call logging tasks.
- Predefined subjects aren't available unless you turn off the Show simpler New Task form on mobile setting.
- If Shared Activities isn't enabled, custom reports based on activity relationships don't include event organizers along with invitees. Custom reports also don't show events to which no one has been invited.
- If Shared Activities is enabled
 - You can relate a task to up to 50 contacts or one lead using the Name field.
 - You can't relate multiple contacts to a recurring task series.
 - In Salesforce Classic, you can't relate multiple contacts to a task assigned to multiple users.
- The My Tasks view on today's task card shows tasks that either have no due date or are overdue for fewer than 30 days. Anything overdue for more than 30 days is shown only in the Overdue filter.

Tasks overdue for more than 30 days obscure a user's focus from what they must accomplish next. Showing only tasks that are due within a month also improves the load time of the My Tasks view.

EDITIONS

Available in Lightning Experience, all versions of the Salesforce app, and Salesforce Classic

Available in: **All** Editions except **Personal**

• You can eliminate a contact or a record on a task without deleting the entire task. For example, suppose that a task is related to Contact A and Contact B, and you want to relate it only to Contact A. Rather than deleting the task, remove Contact B from the Name field.

Where to Track Tasks

- Home page—A filterable compact view of up to five tasks.
- Kanban view for Opportunities—Cards show alerts when a task is overdue or when no open activities exist on an opportunity.
- Records—In Salesforce Classic and the Salesforce app, use related lists to view tasks. In Lightning Experience, use the activity timeline.
- Tasks tab—Shows task list views, including tasks due today, all your open tasks, overdue tasks, and tasks completed in the past seven
 days.
- Activities reports—View tasks related to certain records and tasks assigned to people below you in the Salesforce role hierarchy.
- List views—Tasks are displayed in activities list views and calendar views.
- Chatter—Task updates appear in the feed for related records. Your Salesforce admin can specify whether you can use Chatter to
 create tasks for different types of records. For example, some people can view but not create tasks in the feeds for accounts that
 they have access to.
- Calendar

How Task Assignment Works

- Tasks can only have one owner at a time. If you reassign the task to someone else, it no longer appears in your task list, unless the person is below you in the role hierarchy. In that case, you see the task in the Delegated view in your task list.
- By default, a task is assigned to the person who creates it. You can assign independent copies of a new task to multiple people, when you create the task.
- Anyone can reassign a task to a coworker. Managers in the role hierarchy can view tasks that they've assigned to people below them in the role hierarchy. They can also use reports to view tasks of people below them in the role hierarchy, but not to edit them.
- In Salesforce Classic, we can send an email notification when someone creates or assigns a task, depending on your organization's settings.
- In Lightning Experience, there aren't options to send an email when you assign a task or receive an email when you receive a task. However, depending on your org's settings, there are email notifications for delegated tasks.

Guidelines for Task Reminders and Notifications in Lightning Experience

Setting a reminder is supported only on the full task layout. This layout is visible when you create a task using the New Task button on the Tasks page.

Creating task reminders from quick actions, like the quick actions on the Activity Composer, is not supported. Remove the Reminder Set field from quick action layouts, because it doesn't let users create tasks with reminders.

When a user is assigned a task, they get a notification. This notification appears in the notification bell in Lightning Experience and in the notification tray in the Salesforce app. When members of a group are assigned, each group member gets a notification.



Note: If a guest user assigns a task to a regular user, the user receiving the task doesn't get a delegated task notification.

You can set activity reminders from your tasks and events in the Salesforce app, and review your reminders from the notification tray in the app.

Guidelines for Task Reminders and Notifications in the Salesforce App

You can set activity reminders from your tasks and events in the Salesforce app, and review your reminders from the notification tray in the app.

Guidelines for Recurring Tasks

- The record type is applied to each instance of a recurring task. It can be any record type that the task creator has access to.
- In Lightning Experience, the Due Date field for the series record is disabled in recurring tasks.
 - In Salesforce Classic, the Due Date field for the series record says Recurs.
 - Individual tasks in a series have different due dates.
- Changes to a series of recurring tasks override changes to single tasks that are due in the future. (Changes to a series don't affect tasks due before the current date.) If you change the frequency or recurrence dates for a series, links to tasks due in the future break. Triggers and workflows are also reset.
- You can't change the status of a task series. You can only change the status of single tasks in a series.
- If you create a recurring task and you leave the reminder checkbox selected, you receive a reminder for each single task in the series.
- If you dismiss a reminder, you aren't reminded about that task again.
- You can attach files to a series of recurring tasks. After you create a series, you can add or delete attachments to each single task in the series.
- Your Chatter feed doesn't display recurring tasks, either in series or singly, and you can't follow recurring tasks in Chatter.

Guidelines for Creating Tasks for People and Groups in Lightning Experience

- You can create up to 200 tasks each assigned to a user.
- When editing a task, you can't create more tasks by adding new users to the assigned to field.
- People who are listed individually and are in one or more groups get only one copy of the task.
- You can't bulk create recurring tasks.
- To find the people who have been assigned a copy of the task, use the Delegated Tasks list view on the Tasks tab.
- Lightning Experience quick actions and the force:createRecord event don't support bulk creation of tasks for people and groups.

Recurring Task Limits

There is a limit to how many recurring tasks you can create in a series, and the limit varies based on task frequency. The latest possible end date depends on the maximum number of tasks. For example, a recurring task that repeats every month supports up to 60 tasks in the series. In this case, the end date can be scheduled up to five years after the start date.

| Frequency | Maximum Number of Tasks | Latest End Date (From the Start Date) |
|-----------|-------------------------|---------------------------------------|
| Daily | 100 | 100 days |
| Weekday | 100 | 20 weeks |
| Weekly | 53 | 1 year |
| Monthly | 60 | 5 years |

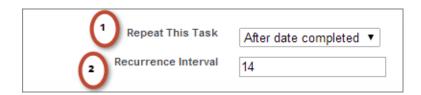
| Frequency | Maximum Number of Tasks | Latest End Date (From the Start Date) | |
|-----------|-------------------------|---------------------------------------|--|
| Yearly | 10 | 10 years | |

SEE ALSO:

Set Up Tasks for Your Sales Reps
Enable Simpler Task Form in the Salesforce App
Activity Reminders and Notifications
Personalize Your Salesforce Experience

Repeat a Task

Use repeating tasks to make a task recur a specified number of days after a trigger that you choose. The next task in the series is created only when the current task is due or marked completed. Repeating tasks are a streamlined alternative to regularly recurring tasks when you don't have to get a task done on a specific day.



- 1. View a new or existing task.
- **2.** For Repeat This Task, select **After due date** or **After date completed**. If you don't see the repeating tasks option, ask your Salesforce administrator to add repeating tasks to a page layout.

EDITIONS

Available in Lightning Experience, all versions of the Salesforce app, and Salesforce Classic

Available in: **All** Editions except **Personal**

USER PERMISSIONS

To create repeating tasks:

Fdit Tasks



Note: When tasks in a series are set to repeat after their due date, Salesforce doesn't create recurrences that would have been due in the past. Instead, Salesforce keeps adding the interval until a repeated task has a due date in the future.

For example, suppose that someone sets a task to repeat three days after it's due. But, that person doesn't complete the task (mark it Closed) until five days after it's due. Instead of creating a task that's already overdue, Salesforce gives the new task a due date of tomorrow. This due date is equivalent to 6 days after the due date; two intervals of three days each.

If that person completes the repeating task (marks it Closed) before the due date, the next task is still due three days after the due date.

3. For Recurrence Interval, enter the number of days after the task's due date or completed date when you want the next task to be due.

If Repeat This Task on an existing task is set to **(Task closed)**, it indicates that the task was closed as part of a repeating series. You can use this information to distinguish repeating tasks from other tasks for reporting purposes.

If you use Salesforce for Outlook to sync tasks, individual tasks in a repeating series are synced as they're created.



Note: Task attachments aren't included on repeated tasks. Instead, use Salesforce Files or include a URL that links to a shared drive.

SEE ALSO:

Share Files via Link

Disable Task Notifications in Salesforce Classic

Depending on your Salesforce settings, you may be able to control whether you receive a notification when someone creates or assigns you a task.

- Note: The Salesforce app has separate settings for the task assignment notifications that you receive via your mobile device.
- Note: Lightning Experience doesn't display an option to send an email when you assign a task. It also doesn't display a setting to receive an email when someone assigns you a task. However, if you switch from Lightning Experience to Salesforce Classic, one of these options can be available. It depends on how your admin has set up your Salesforce org. If one of these options is available, you can receive emails for tasks that you assign to yourself or created with a status of Completed.
- **1.** From your personal settings, enter *Activity Reminders* in the Quick Find box, then select **Activity Reminders**.
- 2. Deselect Email me when someone assigns me a task.

Assign up to 100 coworkers an independent copy of the same task. For example, you can create a task "Submit your expense reports" with the appropriate due date and assign it to a team of account executives.

You can add multiple assignees only when creating a task. You can't add assignees to an existing task.

1. On the New Task page, click the lookup icon () next to the Assigned To field.

Assign Tasks to Multiple People in Salesforce Classic

- 2. In the lookup window, select the **Multiple Users** tab.
- 3. Add up to 100 people (including members of groups) to Selected Members.
 - ? Tip: Personal groups are a convenient way to organize users into groups that are meaningful to you. For details, see Creating and Editing Groups.

EDITIONS

Available in Salesforce Classic

Available in: **All** Editions except **Personal**

USER PERMISSIONS

To create tasks

Edit Tasks

EDITIONS

Available in Lightning Experience and Salesforce Classic

Available in: All Editions

USER PERMISSIONS

To create tasks:

Edit Tasks

4. Click Done.

The New Task page displays your selections and the total number of tasks next to the Assigned To field.

5. Save the task.

You've now assigned copies of the task to the coworkers you selected. Coworkers can edit, reassign, or delete their individual tasks.

Task Fields

Task records have standard fields for tracking and recording task details.

| Field | Description |
|-------------------------------------|---|
| Activity Currency | Indicates the default currency for all currency amount fields in the task. Amounts are displayed in the task currency and are also converted to a user's personal currency. Available only in orgs in which multiple currencies are used. |
| Assigned To | Indicates the assigned owner of a task. By default, the task is assigned to the user who created it. This field isn't available in Personal Edition. |
| Call Duration | Indicates the duration of a call in seconds. This field is populated when a call is answered using Salesforce CRM Call Center. |
| Call Object Identifier | Indicates the ID of a call logged in Salesforce through Salesforce computer-telephony integration (CTI) with a third-party telephony system. This field is often populated with the ID stored in the telephony system. Limit is 255 characters. |
| Call Result | Represents the result of a given call; for example, "we'll call back" or "call unsuccessful." Limit is 255 characters. A Salesforce admin can customize the selections in the picklist. |
| Call Type | Indicates the call type: inbound, internal, or outbound. A Salesforce admin can customize the selections in the picklist. |
| Comments | Contains a description of the task. The limit is 32 KB of data. If Spell Checker is enabled in your org, a user can spell-check the contents. |
| Create Recurring Series of Tasks | This checkbox lets a user set up a series of recurring tasks. Enabling this option disables the Due Date field, because each task occurrence in a series has a different due date. |
| Created By | Indicates the user who created the task, along with the task creation date and time. Read only. |
| Division | Indicates the division to which the task belongs. This value is inherited from the related account, lead, case, or custom object, if any. Otherwise, the task belongs to the global division. Available |

EDITIONS

Available in Lightning Experience, all versions of the Salesforce app, and Salesforce Classic

Available in: **All** Editions except **Personal**

| Field | Description |
|------------------|--|
| | only in orgs in which divisions are used to segment data. |
| Due Date | Indicates the date when the task is due. |
| Email | Contains the email address of the contact or lead associated with the task. This field is filled in with the value from the related contact or lead record. |
| Last Modified By | Indicates the user who last changed the task, along with the task modification date and time. This field is read only. |
| Name | Contains the name of the contact or lead related to the task. If Shared Activities is enabled in your org, a user can relate up to 50 contacts to a non-recurring task. This field is visible only to users who have the "Read" permission for contacts and leads. Relating a contact to a task can affect the account to which Salesforce relates the task. See the Related To field. |
| Phone | Contains the phone number of the contact or lead related to the task. This field is filled in with the value from the related contact or lead record. |
| Priority | Indicates the urgency of the task; for example, low, medium, or high. A Salesforce admin can customize the selections in the picklist. |
| Public | Note: Before Summer'13, this field was called Visible in Self-Service. |
| | By selecting this checkbox, a user can specify that the completed task is visible in the Self-Service portal. |
| | Note: Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal. |
| | If Communities is enabled in your org, this field specifies whether a task is visible to external users in communities. If an external user owns the task, that user sees the task in the community regardless of whether it's marked Public. |
| | This field is not visible by default. A Salesforce admin can make it visible. |
| Related To | Indicates the record that the task is related to, such as an account or an opportunity. This field is available only when a user relates the task to a contact, not to a lead. The record is visible only to users with the "Read" permission for the type of record the task is related to. |
| | If a user relates the task to an object other than an account, Salesforce determines the account on the task as follows. |

| Field | Description |
|------------------|--|
| | Suppose that a user relates the task to an opportunity, a contract, or a custom entity that belongs to an account. Salesforce uses that object's account as the account for the task. |
| | Suppose that a user relates the task to some other object and also to a contact. Salesforce uses the primary contact's account as the account for the task. |
| | If a user leaves the Related To field empty, Salesforce doesn't relate an account to the task. |
| Status | Indicates the status of a task; for example, "not started" or "completed." A Salesforce admin can customize the selections in the picklist. |
| Subject | Contains the subject of the task. |
| Task Record Type | Contains the name of the field that determines which picklist values are available for the record. Available in Professional, Enterprise, Unlimited, Performance, and Developer Editions. |
| Туре | Indicates the task type; for example, Email or Meeting. Limit for values in the picklist is 40 characters. |

Considerations for Closing and Reopening Tasks

Salesforce Classic differs from Lightning Experience and the Salesforce app in the way it handles validation rules on tasks.

- Lightning Experience—Suppose that you've created a validation rule for tasks; for example, you require users to enter a comment before closing a task. If you've set up more than one Closed status for tasks, users must choose a status when they reopen or close a task. If you've set up more than one Open status for tasks and a user reopens a task, Lightning Experience remembers the last Open status.
- Salesforce Classic—Suppose that you've created a validation rule for closing a task; for example, you require users to enter a comment. Before users can close a task, they must first open the task detail page and edit the task. Likewise, if you've set up more than one Open status for tasks, users must edit the task to choose a status when they reopen a task.

EDITIONS

Available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app

Available in: All Editions

Considerations for Enabling User Control of Emails Notifications for Tasks

When the setting **Enable user control over task assignment notifications** is enabled in Activity Settings, users see the option **Email me when someone assigns me a task** in their personal settings. Both the setting and the option are enabled by default. Enabling and disabling the setting affects users in different ways. Before migrating a Salesforce org, avoid excessive email notifications by disabling the setting. You can re-enable it after migration.

EDITIONS

Available in Salesforce Classic

Available in: All Editions

Table 8: Effects of Enabling and Disabling the Feature in Setup

| User Type | Effects of Enabling the Feature | Effects of Disabling the Feature | | |
|--|--|--|--|--|
| Salesforce app users, including Communities users | In My Settings > Notifications , the Assigns you a task checkbox is displayed. | In My Settings > Notifications , the Assigns you a task checkbox isn't displayed. | | |
| Lightning Experience users | In Lightning Experience, the Email me when someone assigns me a task checkbox isn't displayed. However, users who have turned on that option in Salesforce Classic still receive email notifications. | No user receives an email notification when another user assigns a task. | | |
| On the Create Task page, the Send email notification and Make this t default setting checkboxes aren't displayed. On the Activity Reminders page in the user's personal settings, the Email n when someone assigns me a task checkbox is displayed, and it's select by default. | | On the Create Task page, the Send email notification and Make this the default setting checkboxes are displayed, and email notifications are sent according to whether the checkboxes are selected. The Email me when someone assigns me a task checkbox isn't displayed. | | |
| Partner portal users | On the Create Task page, the Send email notification and Make this the default setting checkboxes aren't displayed. Email notifications are sent whenever someone assigns a task to a user (partner portals have no settings page for admins or users). | On the Create Task page, the Send email notification and Make this the default setting checkboxes are displayed, and email notifications are sent according to whether the checkboxes are selected. | | |
| Users who are assigned tasks that are generated by workflow task rules | On the New Task page for workflow tasks, the Notify Assignee checkbox isn't displayed. If a Salesforce admin selected the Notify Assignee checkbox before Winter '15, task assignees who deselect the option don't receive notifications. | Email notifications are sent to task assignees according to workflow task rules. | | |
| Users who are assigned tasks through an API | Use an API to set the triggerUserEmail value. The default is false. • If triggerUserEmail = true, notifications are sent according to individual users' settings. | If triggerUserEmail is true, email notifications are sent to all users when tasks are assigned. If triggerUserEmail is false, email notifications aren't sent when a task is assigned. | | |

| User Type | Effects of Enabling the Feature | Effects of Disabling the Feature |
|---|---|---|
| | If triggerUserEmail = false, email notifications aren't sent when a task is assigned. | |
| Users who are assigned tasks through Apex | Notifications that are sent through Apex are sent in the context of the request header. | If a value in the request header is set so that email notifications are sent, email notifications are sent to users when tasks are assigned. Apex processes the header sequentially from the first line to the last. If a statement in the request header indicates that a task notification is required, an email notification is sent regardless of statements later in the header. |



Note: Lightning Experience doesn't display an option to send an email when you assign a task. It also doesn't display a setting to receive an email when someone assigns you a task. However, if you switch from Lightning Experience to Salesforce Classic, one of these options can be available. It depends on how your admin has set up your Salesforce org. If one of these options is available, you can receive emails for tasks that you assign to yourself or created with a status of Completed.

SEE ALSO:

Enable User Control of Email Notifications for Tasks in Salesforce Classic

Set Up Tasks for Your Sales Reps

Optimize the way your sales reps manage their work. Options differ for Lightning Experience, Salesforce Classic, and the Salesforce app.

Enable User Control of Email Notifications for Tasks in Salesforce Classic

Display a setting that lets users decide whether to receive an email notification when assigned a task.

Enable Recurring Tasks

Let users create tasks that repeat at a specified interval. If you disable this setting, users can still edit the interval of an existing recurring task, but they can't create more recurring tasks.

Enable Group Tasks in Salesforce Classic

In Salesforce Classic, let users assign independent copies of a new task to multiple users.

Enable Task Notifications in Lightning Experience

With task notifications, your reps remember the things on their to-do lists.

Enable Simpler Task Form in the Salesforce App

Display a New Task page with key task fields shown first.

Customize the Fields that Display on Tasks in the Activity Timeline

To customize the display and order of fields for items in the task list, create and customize the compact layout for tasks.

EDITIONS

Available in Lightning Experience, all versions of the Salesforce app, and Salesforce Classic

Available in: All Editions except Personal

Customize Task List Actions

To customize the buttons that appear next to task lists, like the one on the Tasks tab, update the Tasks page layout.

SEE ALSO:

Customization Options for Events and Calendars

Add Send an Email, Log a Call, New Event, and New Task Buttons to the Activity Composer

Tasks

Guidelines for Using Tasks

Enable User Control of Email Notifications for Tasks in Salesforce Classic

Display a setting that lets users decide whether to receive an email notification when assigned a task

- From Setup, enter Activity Settings in the Quick Find box, then select Activity Settings.
- 2. Select Enable user control over task assignment notifications.
- 3. Click Submit.

SEE ALSO:

Considerations for Enabling User Control of Emails Notifications for Tasks

EDITIONS

Available in Salesforce Classic

Available in: **All** Editions except **Personal**

USER PERMISSIONS

To enable email notifications for tasks:

 Customize Application and Modify All Data

Enable Recurring Tasks

Let users create tasks that repeat at a specified interval. If you disable this setting, users can still edit the interval of an existing recurring task, but they can't create more recurring tasks.

Enable Recurring Tasks in Lightning Experience and the Salesforce Mobile App

Use recurring tasks to create tasks that repeat at a specified interval.

Enable Recurring Tasks in Salesforce Classic

Use recurring tasks to create tasks that repeat at a specified interval.

EDITIONS

Available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app

Available in: **All** Editions except **Personal**

Enable Recurring Tasks in Lightning Experience and the Salesforce Mobile App

Use recurring tasks to create tasks that repeat at a specified interval.

- From Setup, enter Activity Settings in the Quick Find box, then select Activity Settings.
- 2. Select Enable Creation of Recurring Tasks.
- 3. Click Submit.
- **4.** Add the **Create Recurring Series of Tasks** field to the Task Detail section of your org's Task page layouts.

If the Salesforce Mobile and Lightning Experience Actions section on a Task page layout has been overridden, include the Delete Series and View Series actions from the Mobile & Lightning Actions category in the section. Add these actions if they're not already there.

To create recurring tasks in the Salesforce app, deselect **Show simpler New Task form on mobile** on the Activity Settings page. The simpler New Task form doesn't include the options for creating recurring tasks.

EDITIONS

Available in Lightning Experience and all versions of the Salesforce mobile app

Available in: **All** Editions except **Personal**

USER PERMISSIONS

To enable recurring tasks:

 Customize Application and Modify All Data

SEE ALSO:

Enable Simpler Task Form in the Salesforce App

Enable Recurring Tasks in Salesforce Classic

Use recurring tasks to create tasks that repeat at a specified interval.

- From Setup, enter Activity Settings in the Quick Find box, then select Activity Settings.
- 2. Select Enable Creation of Recurring Tasks.
- 3. Click Submit.

EDITIONS

Available in Salesforce Classic

Available in: **All** Editions except **Personal**

USER PERMISSIONS

To enable recurring tasks:

 Customize Application and Modify All Data

Enable Group Tasks in Salesforce Classic

In Salesforce Classic, let users assign independent copies of a new task to multiple users.

- From Setup, enter Activity Settings in the Quick Find box, then select Activity Settings.
- 2. Select Enable Group Tasks.
- 3. Click Submit.

This setting does not affect Lightning Experience; groups tasks are enabled by default in Lightning Experience.

EDITIONS

Available in Lightning Experience and Salesforce Classic

Available in: **All** Editions except **Personal**

USER PERMISSIONS

To enable group tasks:

 Customize Application and Modify All Data

Enable Task Notifications in Lightning Experience

With task notifications, your reps remember the things on their to-do lists.

For your reps to receive reminders, you must enable Universal Notification Service (UNS). UNS is used for notifications in the Lightning Experience notification bell and is enabled by default.

- 1. From Setup, select **Object Manager**.
- 2. Click Task.
- **3.** Open an existing task layout or create one.
- **4.** Add the **Reminder Set** field to your Task Detail section of our org's Task page layouts.
- **5.** Deselect **Show simpler New Task form on mobile** on the Activity Settings page. The simpler New Task form doesn't include the options for creating task notifications.

The New Task global action doesn't support task reminders.

Push notifications and reminders in the notification tray aren't supported in the Salesforce app. While reps can set and change notification settings in the Salesforce app, they don't receive notifications in it.

EDITIONS

Available in Lightning Experience only

Available in: **All** Editions except **Personal**

USER PERMISSIONS

To edit a page layout:

Customize Application

To customize the fields that display on tasks:

 Customize Application and Modify All Data

SEE ALSO:

Enable Simpler Task Form in the Salesforce App

Enable Simpler Task Form in the Salesforce App

Display a New Task page with key task fields shown first.

 From Setup, enter Activity Settings in the Quick Find box, then select Activity Settings.

- 2. Select Show simpler New Task form on mobile.
- 3. Click Submit.

This form doesn't allow the creation of task reminders or recurring tasks, or the use of predefined subjects.

SEE ALSO:

Enable Recurring Tasks in Lightning Experience and the Salesforce Mobile App Enable Task Notifications in Lightning Experience

Customize the Fields that Display on Tasks in the Activity Timeline

To customize the display and order of fields for items in the task list, create and customize the compact layout for tasks.

Certain fields remain in the task list even if you remove them from a layout, because they contain essential task information, including the subject, status, and due date fields. For example, suppose that you remove the status and due date fields from a compact layout. The task checkbox and the due date still appear on tasks in the list. The remaining fields visible in the list reflect the fields you include in the compact layout.

- 1. From Setup, at the top of the page, select **Object Manager**.
- 2. Click Task.
- 3. Click Compact Layouts.
- **4.** Click **New**. If you've already created a custom compact layout for tasks, select it.
- 5. If you're creating a new compact layout, enter a name and label for it.
- **6.** Select the task fields you want to display on the activity timeline.
- 7. Click Save.
- 8. Click Compact Layout Assignment.
- 9. Click Edit Assignment.
- 10. Select the new or updated layout.
- 11. Click Save.

When you click **Expand All** on the activity timeline, you see the selected task fields.

SEE ALSO:

Compact Layouts

EDITIONS

Available in Lightning Experience and all versions of the Salesforce app

Available in: **All** Editions except **Personal**

USER PERMISSIONS

To enable simpler tasks in the Salesforce app:

 Customize Application and Modify All Data

EDITIONS

Available in Lightning Experience

Available in: **All** Editions except **Personal**

USER PERMISSIONS

To customize the fields that display on tasks:

 Customize Application and Modify All Data

Customize Task List Actions

To customize the buttons that appear next to task lists, like the one on the Tasks tab, update the Tasks page layout.

- 1. View the page layout for Tasks.
- 2. Drag and drop buttons into the Salesforce Mobile and Lightning Experience Actions section.
- 3. Click Save.

Events and Calendars

Use Salesforce to track meetings with customers, prospects, and colleagues. Drill down from events to related records, feeds, files, contracts, and more. You can also track events in reports.

Help Your Sales Reps Manage Events and Calendars

Optimize the way your sales reps manage their meetings and scheduling. Options differ for Lightning Experience, Salesforce Classic, and the Salesforce app.

Event Fields

Event records have standard fields for tracking and recording event details.

Manage Events

In Salesforce, events are a powerful tool for keeping on top of customer relationships and closing deals. You can relate events to opportunities, leads, accounts, and contacts. Track them on those records, in your calendar, and in reports.

Use Calendars to Track and Visualize Dates in Salesforce Objects in Lightning Experience

Want an easy, visual way to track upcoming or ongoing campaigns? Support cases? Retail store events? Opportunities due to close? Create a calendar from a standard or custom object: Choose a date field that represents data you want to track, and the calendar displays data in that field as calendar items. You can customize most calendars by applying a list view. We've included a few popular examples. You can hide or show calendars, and you can edit and delete them. Some considerations apply to creating calendars.

Calendar Sharing

Give coworkers access to view or edit your calendar in Salesforce Classic and Lightning Experience.

Calendar Views

Calendar views display your events in Salesforce.

Considerations for Using Events and Calendars

Salesforce always displays an event's date and time in the time zone you've chosen in My Settings. Working with meetings and scheduling is different in Lightning Experience and Salesforce Classic.

Scheduling and Invitations in Salesforce Classic

Reps can invite people to meetings and see meeting responses in Lightning Experience, Salesforce Classic, and the Salesforce app. Reps can also accept meeting invites and create a Microsoft® Outlook® appointment for an event in Salesforce Classic.

SEE ALSO:

Activities: Tasks, Events, and Calendars

Tasks

EDITIONS

Available in Lightning Experience, all versions of the Salesforce app, and Salesforce Classic

Available in: **All** Editions except **Personal**

USER PERMISSIONS

To customize task actions:

 Customize Application and Modify All Data

Help Your Sales Reps Manage Events and Calendars

Optimize the way your sales reps manage their meetings and scheduling. Options differ for Lightning Experience, Salesforce Classic, and the Salesforce app.

Customization Options for Events and Calendars

Get a brief overview of all options for customizing how sales reps manage their meetings and scheduling. Options differ for Lightning Experience, Salesforce Classic, and the Salesforce app.

Set Up Reps to Work with Event Attendees in Lightning Experience and the Salesforce App

Admins can set up reps to work with contacts, leads, and other Salesforce users as attendees on their events. Depending on how they're set up, reps can invite and remove attendees from events, or simply see who's invited or who accepted the invitation. And because Lightning Sync is required, reps' events also sync between Salesforce and Microsoft[®] Exchange or Google Calendar[™]. That way, your whole team has access to important meeting data.

Set Up Lightning Experience Event Reminders

With event reminders, your reps remember to show up for their meetings.

Create and Manage a Public Calendar or a Resource Calendar in Salesforce Classic

Use a public calendar to manage group activities. For example, track a group's events, such as marketing events, product releases, or training classes, or schedule a common activity, such as a team vacation. Use a resource calendar to schedule the use of a shared resource, such as a conference room or an overhead projector.

SEE ALSO:

Customization Options for Events and Calendars

Customization Options for Events and Calendars

Get a brief overview of all options for customizing how sales reps manage their meetings and scheduling. Options differ for Lightning Experience, Salesforce Classic, and the Salesforce app.

| Setting or Feature | Description | Setup and Help | Lightning Experience | Salesforce Classic | The Salesforce App |
|------------------------------|---|--|-------------------------|-----------------------|--------------------------|
| Allow multiday events. | Let users create events that end more than one day (24 hours) after they start. | From Setup, enter Activity Settings inthe Quick Find box, then select Enable Multiday Events. | ✓ | * | * |
| Allow recurring events. | Let users create events that repeat at a specified interval. If you | From Setup, enter Activity Settings in the Quick | | ✓ | |



| Setting or Feature | Description | Setup and Help | Lightning Experience | Salesforce Classic | The Salesforce App |
|--|---|---|-------------------------|--------------------|-----------------------|
| | disable this setting, users can still edit the interval of an existing recurring event, but they can't create recurring events. | Find box, then select Enable Creation of Recurring Events . | | | |
| Allow hover links on Home tab calendar. | Display event details when a user hovers the mouse over an event. | From Setup, enter User Interface in the Quick Find box, then select Enable Home Page Hover Links for Events. | | ❖ | |
| Allow drag-and-drop calendar editing. | Let users drag to reschedule events on the day or week view of their own calendars. | From Setup, enter User Interface in the Quick Find box, then select Enable Drag-and-Drop Editing on Calendar Views. | | * | |
| Let users create events by clicking in the calendar. | Let users create an event by clicking a time slot in the calendar. | From Setup, enter User Interface in the Quick Find box, then select Enable Click-and-Create Events on Calendar Views. | | * | |
| Allow dragging to schedule events. | In Salesforce Classic, on contact and lead list views, let users schedule events by dragging a contact or lead onto the calendar. You can customize the mini page layout for the overlay where users enter event details. In Lightning Experience, on the calendar view, users | In Salesforce Classic, from Setup, enter User Interface in the Quick Find box, then select Enable Drag-and-Drop Scheduling on List Views. See also Overview of Page Layouts and Field-Level Security. In Lightning Experience, no setup | | * | |

| Setting or Feature | Description | Setup and Help | Lightning Experience | Salesforce Classic | The Salesforce App |
|---|---|--|-------------------------|--------------------|-----------------------|
| | can drag events to update start times or dates. | is required to drag events. | | | |
| Enable sidebar calendar shortcut. | Display a link ()) to a user's last-used calendar view in the sidebar above Recent Items. | From Setup, enter User Interface in the Quick Find box, then select Enable Sidebar Calendar Shortcut. | | ✓ | |
| Enable hover link for My Tasks list. | Show task details in a popup on the Home tab when a user hovers the mouse over a task. | From Setup, enter User Interface in the Quick Find box, then select Enable Hover Links for My Tasks list. | | ✓ | |
| Show event details in multiuser calendar view. | Display event details on-screen rather than on hover in daily, weekly, and monthly calendar views for all users. Enabling this setting doesn't override calendar sharing. | From Setup, enter Activity Settings in the Quick Find box, then select Show event details on multi-user calendar view. | | ❖ | |
| Create public calendars and resource calendars. | Create calendars for managing group activities, such as marketing events, product releases, training classes, and team vacations, or shared resources, such as a conference room. | See Create and Manage a Public Calendar or a Resource Calendar in Salesforce Classic on page 353. | | ✓ | |
| View, invite, or remove event invitees. | Let users view, invite, or remove event invitees on their events in Salesforce Classic. | Invitees don't require setup. | | ❖ | |

| Setting or Feature | Description | Setup and Help | Lightning Experience | Salesforce Classic | The Salesforce App |
|--|---|--|-------------------------|--------------------|-----------------------|
| View, invite, or remove event attendees. | Let users view, invite, or remove event attendees in Lightning Experience or the Salesforce app. | Work with Event Attendees in | ❖ | | ✓ |
| Set event reminders. | Let users set event reminders in Lightning Experience or the Salesforce app. Users see reminders in Lightning Experience only. | See Set Up Event Reminders in Lightning Experience | ❖ | | |

SEE ALSO:

Set Up Tasks for Your Sales Reps

Add Send an Email, Log a Call, New Event, and New Task Buttons to the Activity Composer

Set Up Reps to Work with Event Attendees in Lightning Experience and the Salesforce App

Admins can set up reps to work with contacts, leads, and other Salesforce users as attendees on their events. Depending on how they're set up, reps can invite and remove attendees from events, or simply see who's invited or who accepted the invitation. And because Lightning Sync is required, reps' events also sync between Salesforce and Microsoft[®] Exchange or Google Calendar[™]. That way, your whole team has access to important meeting data.

Admins can select these Lightning Sync settings to give reps access to certain attendee features. See Considerations for Selecting Attendee Features by Lightning Sync Setting

Keep in mind that these Lightning Sync settings limit event functionality in Salesforce Classic. See Considerations for Using Events and Calendars in Salesforce Classic on page 380.

To set up attendees, admins can follow these steps.

- 1. Decide how you want reps to work with attendees. From Setup, configure Lightning Sync for Microsoft Exchange or Google, selecting the appropriate sync directions.
- 2. From Setup, add the Attendees field to the Event page layout or the quick actions layout for events
- 3. Tell reps that they have to create and edit events from Lightning Experience, the Salesforce app, or their Microsoft Outlook® or Google Calendar™. If reps create or edit records in Salesforce Classic, they can't work with the attendees field and events don't sync.

 Invitations initiated in Lightning Experience or the Salesforce app are emailed from Microsoft or Google Calendar. Attendees can accept or decline event invitations from those email or calendar applications only. Attendee responses then sync to Salesforce so that other attendees can see the attendance status.

SEE ALSO:

Lightning Sync

Considerations for Using Events and Calendars in Lightning Experience

EDITIONS

Available in: Lightning Experience and all versions of the Salesforce app

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

USER PERMISSIONS

To prepare your Microsoft Exchange server to communicate with Salesforce:

 Global administrator access to your company's Office 365 or Exchange account

To prepare your G Suite account to communicate with Salesforce:

 The Owner role on your company's G Suite account, which gives you administrative permissions

To access Setup in Salesforce:

Customize Application

To create, edit, or delete Lightning Sync configurations:

 Manage Exchange Configurations AND Manage Users

Set Up Lightning Experience Event Reminders

With event reminders, your reps remember to show up for their meetings.

Admins can follow these steps to set up event reminders in Lightning Experience. Remember that the New Event global action doesn't support event reminders, even though you can add them to the global action layout.

1. Confirm that activity reminders are enabled.

This setting lets reps see event reminders pop up on the top right corners of their browsers.

Confirm that in-app notifications are enabled. From Setup, enter Salesforce
 Notifications in the Quick Find box, then select Salesforce Notifications. Select
 Enable in-app notifications.

This setting lets reps see event reminders in the global navigation notification list.

3. Add the **Reminder Set** field to Event page layouts.

EDITIONS

Available in Lightning Experience only

Available in: All Editions

USER PERMISSIONS

To edit a page layout:

Customize Application

To customize the fields that display on tasks:

Customize Application and Modify All Data

Create and Manage a Public Calendar or a Resource Calendar in Salesforce Classic

Use a public calendar to manage group activities. For example, track a group's events, such as marketing events, product releases, or training classes, or schedule a common activity, such as a team vacation. Use a resource calendar to schedule the use of a shared resource, such as a conference room or an overhead projector.

You can create an unlimited number of calendars.

- View and edit your existing public calendars and resource calendars.
 From Setup, enter Public Calendars and Resources in the Quick Find box, then select Public Calendars and Resources.
- Create a public calendar or a resource calendar.
 - 1. Click New, name the calendar, select Active, and save the calendar.
 - 2. Click **Sharing**. Add the public groups, roles, or people you want to share the calendar with.
 - 3. In Calendar Access, specify the way you want to share the calendar.

Hide Details

Other people can see whether given times are available, but they can't see other information about events in the calendar.

Hide Details and Add Events

Other people can see whether given times are available, but they can't see details of events. Other people can insert events in the calendar.

Show Details

Other people can see detailed information about events in the calendar.

Show Details and Add Events

Other people can see detailed information about events in the calendar, and they can insert events in the calendar.

Full Access

Other people can see detailed information about events in the calendar, insert events in the calendar, and edit existing events in the calendar.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Essentials Edition,Group Edition**, and **Personal Edition**

USER PERMISSIONS

To manage public calendars:

Customize Application

To manage resource calendars:

Customize Application

To view a related record on an event:

 Users must have Read permission

- Delete a public calendar.
 - From Setup, enter Public Calendars and Resources in the Quick Find box, then select Public Calendars
 and Resources.

2. Click **Del** next to the name of a calendar.

Ensure that users have the appropriate permissions. For example, an event invitee who doesn't have "Read" permission on opportunities can't view the opportunity associated with the event.

Event Fields

Event records have standard fields for tracking and recording event details.

Event Fields in Lightning Experience

These standard fields for tracking and recording event details are available in Lightning Experience.

Event Fields in Salesforce Classic

These standard fields for tracking and recording event details are available in Salesforce Classic.

Event Fields in Lightning Experience

These standard fields for tracking and recording event details are available in Lightning Experience.

| Field | Description |
|--------------------------|--|
| Activity Currency | Indicates the default currency for all currency amount fields in the activity. Amounts are displayed in the activity currency. They are also converted to the user's personal currency. Available only in orgs in which multiple currencies are used. |
| All-Day Event | By selecting this checkbox, a user specifies that the event lasts all day. |
| Assigned To | Indicates the assigned owner of the event. By default, the event is assigned to the user who created it. If an event includes invitees, invitees get a copy of the original event in which the invitee is the event owner. This field isn't available in Personal Edition |
| autoRelateEventAttendees | When users add attendees to events, events are automatically related to up to 50 contacts or one lead. An attendee is matched by their email address to a contact or lead. Admins control this field on the Activity Settings page. |
| | Available in API version 42.0 and later. |

EDITIONS

Available in Lightning Experience in: **All** Editions except **Personal** and **Contact Manager** Editions

| Field | Description |
|-------------------|---|
| Created By | Indicates the user who created the event, including the creation date and time. Read only. |
| Date | Indicates the planned date of the event. This field is displayed only if multiday events are disabled. |
| Description | Description of the event. The limit is 32 KB of data. |
| Division | Indicates the division to which the activity belongs. This value is inherited from the related account, lead, case, or custom object, if any. Otherwise, the activity belongs to the global division. Available only in orgs in which divisions are used to segment data. |
| Duration | Represents the length of an event spanning less than a full day, in hours and minutes. This field appears only if multiday events are disabled. |
| Email | Contains the email address of the contact or lead related to the event. This field is filled in with the value from the related contact or lead record. |
| End | Indicates the planned end date and time of the event. This field appears only if multiday events are enabled. |
| Event Record Type | Contains the name of the field that determines which picklist values are available for the record. Available in Professional, Enterprise, Unlimited, Performance, and Developer Editions. |
| Last Modified By | Contains the name of the user who last changed the event, including the modification date and time. Read only. |
| Name | Contains the name of the contact or lead related to the event. If Shared Activities is enabled in your org, a user can relate up to 50 contacts to a non-recurring event. This field is visible only to users with the "Read" permission for contacts and leads. Relating a contact to an event can affect the account to which Salesforce relates the event. See the Related To field. |
| Location | Indicates the location of the event. |
| Phone | Contains the phone number of the contact or lead related to the event. This field is filled in with the value from the related contact or lead record. |
| Private | Indicates whether users other than the event owner can see the event details when viewing the event owner's calendar. However, users with the "View All Data" or "Modify All Data" permission see private event details in reports and searches or when viewing other users' calendars. Exported data files always contain private events. Events with invitees and events being added or changed in another user's calendar can't be marked private. Private events can't be related to other records. |

| Field | Description | | |
|--------------|--|--|--|
| Public | This checkbox lets a user specify whether a past event is visible in the Self-Service portal. | | |
| | Note: Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal. | | |
| | If Communities is enabled in your org, the value in this field specifies whether the event is visible to external users in communities. If an external user owns the event, that user sees the event in the community regardless of whether the event is marked public. | | |
| | This field is not visible by default. A Salesforce admin can expose it. | | |
| Related To | Represents the record that the event is related to, such as an account, an opportunity, or a custom object. This field is available only when a user relates the event to a contact, not to a lead. The record is visible only to users with the "Read" permission for the type of record the event is related to. | | |
| | If you relate the event to an object other than an account, Salesforce determines the account on the event as follows. | | |
| | Suppose that a user relates the event to an opportunity, a contract, or a custom entity that belongs to an account. Salesforce uses that object's account as the account for the event. | | |
| | Suppose that a user relates the event to some other object and also to a contact. Salesforce uses the primary contact's account as the account for the event. | | |
| | If a user leaves the Related To field empty, then Salesforce doesn't relate an account to the event. | | |
| Show Time As | Determines how the event appears when other users view a user's calendar: busy, out of office, or free. | | |
| Start | Planned start date and time of event. This field appears only if multiday events are enabled. | | |
| Subject | Contains the subject of the event. | | |
| Time | Indicates the start time of a planned event. This field appears only if multiday events are disabled. | | |
| Туре | Indicates the event type; for example, email or meeting. Limit for values in the picklist is 40 characters. | | |

Event Fields in Salesforce Classic

These standard fields for tracking and recording event details are available in Salesforce Classic.

| Field | Description |
|-----------------------------------|---|
| Activity Currency | Indicates the default currency for all currency amount fields in the activity. Amounts are displayed in the activity currency. They are also converted to the user's personal currency. Available only in orgs in which multiple currencies are used. |
| All-Day Event | By selecting this checkbox, a user specifies that the event lasts all day. |
| Assigned To | Indicates the assigned owner of the event. By default, the event is assigned to the user who created it. If an event includes invitees, invitees get a copy of the original event in which the invitee is the |
| | event owner. However, on event detail pages, the invitee's copy displays Assigned To as the person assigned to the original event, even though the invitee owns the copy. |
| | This field isn't available in Personal Edition. |
| Create Recurring Series of Events | By selecting this checkbox, a user can set up a series of recurring events. |
| Created By | Indicates the user who created the event, including the creation date and time. Read only. |
| Date | Indicates the planned date of the event. This field is displayed only if multiday events are disabled. |
| Description | Contains a note describing the event. This field holds up to 32 KB of data. |
| Division | Indicates the division to which the activity belongs. This value is automatically inherited from the related account, lead, case, or custom object, if any. Otherwise, the activity belongs to the global division. Available only in orgs in which divisions are used to segment data. |
| Duration | Represents the length of an event spanning less than a full day, in hours and minutes. This field appears only if multiday events are disabled. |
| Email | Contains the email address of the contact or lead related to the event. This field is |

EDITIONS

Available in Salesforce Classic in: **All** Editions

Events with invitees not available in: **Personal** Edition

| Field | Description |
|-------------------|--|
| | automatically filled in with the value from the related contact or lead record. |
| End | Indicates the planned end date and time of the event. This field appears only if multiday events are enabled. |
| Event Record Type | Contains the name of the field that determines what picklist values are available for the record. Available in Professional, Enterprise, Unlimited, Performance, and Developer Editions. |
| Last Modified By | Contains the name of the user who last changed the event, including the modification date and time. Read only. |
| Name | Contains the name of the contact or lead related to the event. If Shared Activities is enabled in your org, a user can relate up to 50 contacts to a non-recurring event. This field is visible only to users with the "Read" permission for contacts and leads. Relating a contact to an event can affect the account to which Salesforce relates the event. See the Related To field. |
| Location | Indicates the location of the event. |
| Phone | Contains the phone number of the contact or lead related to the event. This field is automatically filled in with the value from the related contact or lead record. |
| Private | Indicates whether users other than the event owner can see the event details when viewing the event owner's calendar. However, users with the "View All Data" or "Modify All Data" permission can see private event details in reports and searches, or when viewing other users' calendars. Exported data files always contain private events. Events with invitees and events being added or changed in another user's calendar can't be marked private. Private events can't be related to other records. |
| Public | Note: Before Summer'13, this field was called Visible in Self-Service. |
| | This checkbox specifies whether a past event is visible in the Self-Service portal. |
| | Note: Starting with Spring '12, the Self-Service portal isn't available for new orgs. Existing orgs continue to have access to the Self-Service portal. |
| | If Communities is enabled in your org, the value in this field specifies whether the event is visible to external users in communities. If an external user owns the event, that user sees the event in the community regardless of whether the event is marked public. |

| Field | Description |
|-----------------|--|
| | This field is not visible by default. A Salesforce admin can expose it. |
| Related To | Represents the record that the event is related to, such as an account, an opportunity, or a custom object. This field is available only when a user relates the event to a contact, not to a lead. The record is visible only to users with the "Read" permission for the type of record the event is related to. |
| | If you relate the event to an object other than an account, Salesforce determines the account on the event as follows. |
| | If you relate the event to an opportunity, contract, or custom entity that belongs to an account, Salesforce uses that object's account as the account for the event. |
| | If you relate the event to any other kind of object also relate the event to a contact, Salesforce uses the primary contact's account as the account for the event. |
| | If you leave the Related To field empty, then Salesforce doesn't relate an account to the event. |
| Response | Optional field; allows users invited to an event to enter a note when they accept or decline the event. This field isn't available in Personal Edition. |
| Select Invitees | Lets you relate up to 1,000 people (invitees) and resources to the event. When you search for people or resources to invite to an event, the Available list displays up to 300 results. |
| Show Time As | Picklist. Determines how the event appears when another user views your calendar: busy, out of office, or free. |
| Start | Planned start date and time of event. This field appears only if multiday events are enabled. |
| Subject | Contains the subject of the event; for example, "Meeting." A user can enter a subject or select from a list of previously defined subjects. |
| Time | Indicates the start time of a planned event. This field appears only if multiday events are disabled. |
| Туре | Indicates the event type; for example, email or meeting. Limit for values in the picklist is 40 characters. |
| | |

Manage Events

In Salesforce, events are a powerful tool for keeping on top of customer relationships and closing deals. You can relate events to opportunities, leads, accounts, and contacts. Track them on those records, in your calendar, and in reports.

1. Manage Events in Lightning Experience

Create, update, and track meetings using the Home page, your calendar or calendars you create, the Kanban Board, or the activity timeline.

2. Manage Events in Salesforce Classic

With your calendar in Salesforce, everyone stays informed—your sales team, your sales manager—and meeting prep is easy. You can track, create, and update your own and others' meetings and invitation responses in different locations in Salesforce. Salesforce displays events in activities list views and calendar views; Chatter feeds; and records that events are related to, such as contacts and accounts. You can also track events in reports.

Manage Events in Lightning Experience

Create, update, and track meetings using the Home page, your calendar or calendars you create, the Kanban Board, or the activity timeline.

- On the Home page, Today's Events shows the next five meetings on your calendar today. Past events drop off the list as the day progresses.
- In the navigation menu, choose Calendar to work with all your events and to create events. Share your event calendar with others, subscribe to your coworkers' calendars, and (if you have permission) add events to their calendar and edit their events as needed. Plus, create other calendars from a standard or custom object: Choose the date field you want to track, and the calendar displays data in that field as calendar items.
- On the Kanban Board, opportunities show alerts when no open activities exist. To create an event, click the yellow triangle.
- Use the activity timeline to monitor and update upcoming and past events on an opportunity, a lead, an account, or a contact.
- If your admin or coworkers haven't given you access to coworkers' calendars, use activities reports to view events owned by people below you in the role hierarchy.
 - Note: You can remove a contact or a record from an event without deleting the event. For example, suppose that an event is related to Contact A and Contact B, but you want to relate it only to Contact A. Instead of deleting the event, remove Contact B from the Name field.

SEE ALSO:

Use Calendars to Track and Visualize Dates in Salesforce Objects in Lightning Experience

EDITIONS

Available in Lightning Experience in: **All** Editions except **Personal** and **Contact Manager** Editions

USER PERMISSIONS

To create events

Edit Events

Manage Events in Salesforce Classic

With your calendar in Salesforce, everyone stays informed—your sales team, your sales manager—and meeting prep is easy. You can track, create, and update your own and others' meetings and invitation responses in different locations in Salesforce. Salesforce displays events in activities list views and calendar views; Chatter feeds; and records that events are related to, such as contacts and accounts. You can also track events in reports.

Track Events

You can track events belonging to you and to others in the following locations. To see activities list views, click is on the Home tab or any calendar view, or go to the calendar day or week view.

Events That You Own

- The Home tab, in the Calendar section
- An activities list view: Choose an existing list view or customize one
- Your Chatter feed: Follow an event to track posts, comments, and updates about it

Events Owned by People Who Have Shared Their Calendars with You

The multi-user calendar view

Events That You've Assigned to Others

- The My Delegated Activities list view
- Activities reports

Events Owned by People Below You in Your Organization's Hierarchy

- The My Team's Activities list view
- Activities reports

Upcoming Events

- A calendar view
- The Upcoming Events list view
- The Open Activities related list for a record related to an event

Past Events

- A calendar view
- The My Activities list view
- The Activity History related list for a record related to an event

Events Related to Another Record, Such as a Contact or an Account

- The other record's detail page, in the Open Activities and Activity History related lists
- Your Chatter feed and in the Chatter feed for the other record
- Activities reports

View Event Details

In a calendar view, in an activities list view, in a related list, or on the Home tab, there are two ways to see event details:

- Hover your mouse over an event's subject.
- Click the subject.

EDITIONS

Available in Salesforce Classic in: **All** Editions

Events with invitees not available in: **Personal** Edition

USER PERMISSIONS

To create events

Edit Events

On an event detail page, to view the details of a single event in a recurring series (Ω), select the View Event subtab. To view the details for the series, select the View Series subtab.

identifies events with invitees.

Create Events

On the Home Tab

On the Home tab, under Calendar, click **New Event** or **New Meeting Request**.

In a Chatter Feed

If you create an event in the feed for a record such as a contact, Salesforce automatically relates the event to the record.

In the Sidebar

In the sidebar in Salesforce, in the Create New drop-down list, select **Event**.

On the Detail Page of Another Record

On the Open Activities related list, click **New Event** or **New Meeting Request**. Salesforce automatically relates the event or meeting request to the record.

On the Detail Page of an Event with Invitees

On the detail page of an event that you've invited one or more people to, click **Clone**. You can clone an event that has at least one invitee and isn't a recurring event.

In a Calendar View

- Click New Event.
- In a day view, click a time, such as 9:00 AM.
- In a day or week view, double-click a time slot. You can't double-click to create a recurring event or an event that you invite people to. If double-clicking doesn't open a new event, ask your administrator to enable Click-and-Create Events.
- In a week or month view, click __ .

In an Activity List View ()

In a list view, click New Event.

In a List View of Contacts, Leads, or Other Records

In a list view of contacts, leads, or other records, click 🚮 at the bottom of the page to add a weekly calendar view to the page. Create an event related to a record by dragging the record from the list view down to a time slot on the calendar. If you don't see 🛐, ask your Salesforce admin to enable Drag-and-Drop Scheduling.



🙀 Note: If you schedule meetings with people in a different time zone, your calendar shows their available and busy times in your time zone. An individual person's Time Zone setting (as specified on the personal information page) overrides the Default Time Zone set for the Salesforce org.

Update Events

Anywhere (except reports) that you can view event details, you can edit any event that you have permission to edit.

You can edit an event in several ways:

- To reschedule an event, in a calendar view, drag the event to a different time slot. For best results, place your mouse over the subject line of the event before dragging it. If the event is a recurring event (1), only the single occurrence that you drag is changed, not the entire series.
- Click Edit next to the event in an activities list view, an Open Activities related list, or an Activity History related list. The event detail page opens.

• Go to a calendar view, an activities list view, a related list, or the Home tab. Hover your mouse over the subject of an event. A small window with editing options appears.

Use Calendars to Track and Visualize Dates in Salesforce Objects in Lightning Experience

Want an easy, visual way to track upcoming or ongoing campaigns? Support cases? Retail store events? Opportunities due to close? Create a calendar from a standard or custom object: Choose a date field that represents data you want to track, and the calendar displays data in that field as calendar items. You can customize most calendars by applying a list view. We've included a few popular examples. You can hide or show calendars, and you can edit and delete them. Some considerations apply to creating calendars.

EDITIONS

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

- 1. Create a Calendar in Lightning Experience
 - Here's how to create a calendar based on a standard or custom object in Salesforce.
- 2. Create a Calendar of Opportunity Close Dates in Lightning Experience See all your opportunities' scheduled close dates at a glance.
- 3. Create a Calendar of Task Due Dates in Lightning Experience Make a calendar that shows when your tasks are due.
- 4. Create a Calendar of Direct-Mail Campaigns in Lightning Experience Get a visual overview of all your direct-mail campaigns.
- Create a Calendar to View Open Cases by SLA in Lightning Experience
 Monitor open cases and increase compliance with your service level agreement.
- 6. Considerations for Calendars Created from a Salesforce Object in Lightning Experience

 Considerations for calendars created from a Salesforce object include support for list view filtering, a limit on the number of items that can be displayed, no support for subscribing to calendars, and support for standard objects.

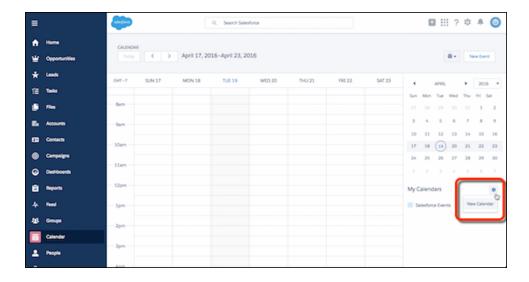
Create a Calendar in Lightning Experience

Here's how to create a calendar based on a standard or custom object in Salesforce.

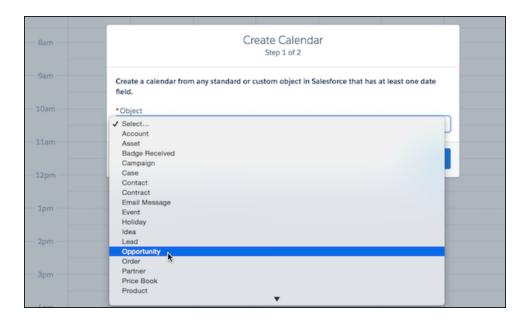
1. Start creating a calendar.

EDITIONS

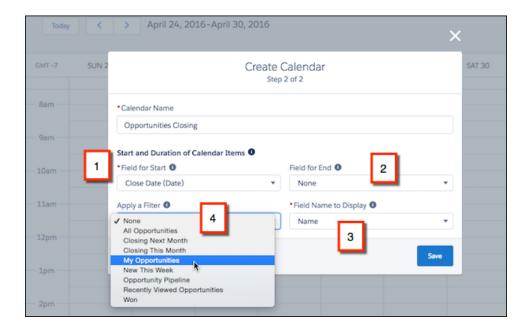
Available in Lightning Experience in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



2. Choose an object to base the calendar on.



3. Select fields that determine what the calendar displays **(1, 2, 3)**. If you want, filter the calendar items by selecting a list view **(4)**.



The calendar displays items differently depending on the date fields you select.

(Date) Fields

Close Date (Date)

The names of some date fields include (Date). If you select a (Date) field, the calendar displays items across the top (as all-day items).

(Date/Time) Fields

Last Modified Date (Date/Time)

The names of other date fields include (Date/Time). If you select a (Date/Time) field in **Field for Start**, the calendar displays items in time slots. If you also select a field in **Field for End** (it's optional) and the items' duration exceeds 24 hours, the calendar displays the items across the top (as all-day items).

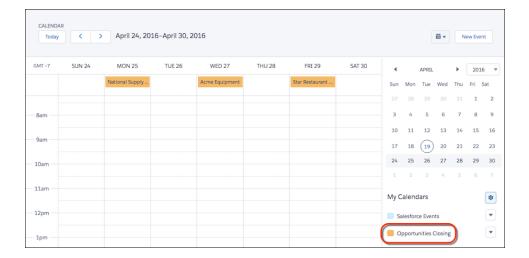
Selecting Start and End Fields



Field for End is optional. If you use it, you must select the same type of field as you do in **Field for Start**. For example, if you select a (Date) field in one, you can't select a (Date/Time) field in the other. If you select fields that generate dates in the wrong order (end before start), Salesforce displays an error message when you save the calendar.

The color of each calendar is the color of the object it's based on. (If a custom object has a theme, the theme determines the color of the calendar.) You can hide or show individual calendars. (You can hide the Salesforce Events calendar, too, but it's not otherwise configurable.)

Suppose that you show a calendar containing enough items to push the total items past the limit (150 items) in that view. Salesforce displays an alert and hides items on other calendars.



SEE ALSO:

Considerations for Calendars Created from a Salesforce Object in Lightning Experience

Create a Calendar of Opportunity Close Dates in Lightning Experience

See all your opportunities' scheduled close dates at a glance.

Use the following selections.

Object

Opportunity

Calendar Name

Opportunities Closing

Field for Start

Close Date (Date)

Field for End

None

Apply a Filter (Optional)

My Opportunities, or another list view

Field Name to Display

Name

Now you have a calendar to remind you of close dates across all your opportunities.

SEE ALSO:

Create a Calendar in Lightning Experience

EDITIONS

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

Create a Calendar of Task Due Dates in Lightning Experience

Make a calendar that shows when your tasks are due.

First, ask your Salesforce admin to replace the Due Date field in the Task layout with a custom Date/Time field. Then use the following selections.

Object

Task

Calendar Name

Tasks Due

Field for Start

Due Date and Time (Date/Time)

Field for End

None

Apply a Filter (Optional)

My Tasks

Field Name to Display

Subject

Now you can see your task due dates alongside your Salesforce events.

Create a Calendar of Direct-Mail Campaigns in Lightning Experience

Get a visual overview of all your direct-mail campaigns.

Use the following selections.

Object

Campaign

Calendar Name

Direct Mail

Field for Start

Start Date (Date)

Field for End

End Date (Date)

Apply a Filter (Optional)

All Active Direct-Mail Campaigns

Field Name to Display

To display the name of each campaign on the calendar: Name

To display each campaign's owner on the calendar: Owner

Now you can visually track direct-mail campaigns by name or owner.

SEE ALSO:

Create a Calendar in Lightning Experience

EDITIONS

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

EDITIONS

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

Create a Calendar to View Open Cases by SLA in Lightning Experience

Monitor open cases and increase compliance with your service level agreement.

Use the following selections.

Object

Case

Calendar Name

Time Left in SLA

Field for Start

Date Opened (Date)

Field for End

Custom formula field, Opened (Date) + 36 hours: SLA Expiration

Apply a Filter (Optional)

All Open Cases, or another list view

Field Name to Display

Customer Name

Now you can see at a glance whether you're meeting your SLA.

SEE ALSO:

Create a Calendar in Lightning Experience

Build a Formula Field

Considerations for Calendars Created from a Salesforce Object in Lightning Experience

Considerations for calendars created from a Salesforce object include support for list view filtering, a limit on the number of items that can be displayed, no support for subscribing to calendars, and support for standard objects.

List View Filtering

No list views are available for filtering calendars based on the Events or Tasks objects. The list view shows all your tasks, open and closed, and all your events. For calendars created from other objects, list views with the scope My and All are supported, but list views with the scope My Team are not.

EDITIONS

EDITIONS

Available in Lightning

Experience in: Enterprise,

Performance, Unlimited,

and **Developer** Editions

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

Calendar Item Limit

You can view up to 150 calendar items total in the day or week view, including Salesforce events and the items on calendars you create. Suppose that you select a calendar containing enough items to push the total past the limit in that view. Lightning Experience displays an alert and hides items on other calendars.

Subscribing to Calendars

You can't subscribe to calendars that other people create. Each calendar can be accessed only by the person who created it.

Standard Objects Supported

| Account | Endorsement | Partner | Social Post |
|----------|-------------|------------|-------------|
| Asset | Event | Price Book | Solution |
| Campaign | Holiday | Product | Task |

CaseIdeaReportTopicContactLeadSkillUser

Contract Opportunity Skill User User Provisioning Request

Email Order Social Persona Work Order

For more information, see Activities: Events and Calendars in What's Not in Lightning Experience.

SEE ALSO:

Create a Calendar in Lightning Experience

Calendar Sharing

Give coworkers access to view or edit your calendar in Salesforce Classic and Lightning Experience.

Calendar Sharing in Lightning Experience

Give coworkers access to view or add events to your calendar in Lightning Experience.

Calendar Sharing in Salesforce Classic

Grant others access to view or edit your calendar in Salesforce Classic, or view a calendar that a coworker shares with you.

Calendar Sharing in Lightning Experience

Give coworkers access to view or add events to your calendar in Lightning Experience.

- 1. Share Your Calendar in Lightning Experience
 Give coworkers access to view or add events to your My Events calendar in Lightning Experience.
- View a Coworker's Calendar in Lightning Experience
 When coworkers share their My Events calendar with you, you can view it in Lightning
 Experience.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **All** Editions except **Personal** Edition

EDITIONS

Available in: Lightning Experience

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

Share Your Calendar in Lightning Experience

Give coworkers access to view or add events to your My Events calendar in Lightning Experience.

Salesforce admins can set organization-wide calendar sharing levels to control how much access coworkers have to each others' calendars. Admins can't give coworkers access to event details.

Give coworkers more access to your calendar by changing your calendar sharing options.

- 1. From the Calendar tab, click calendar options next to your My Events calendar.
- 2. Search and select the name of the coworker who you want to share your calendar with.
- 3. Select the level of access that you want your coworker to have to your calendar.

Hide Details

Coworkers can see whether given times are available but can't see any other information about the nature of events in your calendar.

Hide Details and Add Events

Coworkers can see whether given times are available but can't see details of events. They can insert events in your calendar.

Show Details

Coworkers can see detailed information about events in your calendar.

Show Details and Add Events

Coworkers can see detailed information about events in your calendar, and they can insert events in your calendar.

- 4. Click Who Has Access to see who has access to your calendar, and at what level.
- 5. Click Done.

Coworkers can see your calendar by adding it to their Other Calendars list.

View a Coworker's Calendar in Lightning Experience

When coworkers share their My Events calendar with you, you can view it in Lightning Experience.

Your access to view event details or create events on your coworkers' calendars varies. Your access depends on how your Salesforce admin sets up your organization-wide sharing settings and the calendar sharing options that your coworker has given you.

- 1. From the Calendar tab, click calendar options next to Other Calendars.
- 2. Select Add Shared Calendar.
- **3.** Search for and select the name of the coworker whose calendar you want to view.
- 4. Click Add.

After you add a shared calendar, you see your coworker's events overlaid on your calendar view.

EDITIONS

Available in: Lightning Experience

Available in: **Professional**, **Enterprise**, and **Developer** Editions

USER PERMISSIONS

To create events

Edit Events

EDITIONS

Available in: Lightning Experience

Available in: Essentials, Professional, Enterprise, and Developer Editions

USER PERMISSIONS

To create events

Edit Events

Calendar Sharing in Salesforce Classic

Grant others access to view or edit your calendar in Salesforce Classic, or view a calendar that a coworker shares with you.

Watch a Demo: Who Sees What: Organization-Wide Defaults (English only)

1. Share Your Calendar in Salesforce Classic

You can grant coworkers, personal and public groups, roles, or roles and subordinates access to view or edit your calendar in Salesforce Classic.

2. View a Coworker's Calendar in Salesforce Classic

When coworkers share their calendars with you, you can view the calendars in Salesforce Classic.

SEE ALSO:

Activity Reminders and Notifications
Personalize Your Salesforce Experience

Share Your Calendar in Salesforce Classic

You can grant coworkers, personal and public groups, roles, or roles and subordinates access to view or edit your calendar in Salesforce Classic.

Watch a Demo: Who Sees What: Organization-Wide Defaults (English only)

Options vary for sharing your calendar with others, depending on the organization-wide calendar sharing level that your Salesforce admin sets. The options can make your calendar more available to others, but not less. Calendar sharing settings affect the visibility of items on a calendar, but they don't give coworkers access to event detail pages.

Events associated with a record that you own are visible to anyone above you in the role hierarchy.

- From your personal settings, enter Calendar Sharing in the Quick Find box, then select Calendar Sharing.
- **2.** To share your calendar with others, click **Add**. Select the users, roles, or groups whose activities you want to display in your calendar.
- 3. Specify how you want to share your calendar. Select one of the following:

Hide Details

Coworkers can see whether given times are available but can't see any other information about the nature of events in your calendar.

Hide Details and Add Events

Coworkers can see whether given times are available but can't see details of events. They can insert events in your calendar.

Show Details

Coworkers can see detailed information about events in your calendar.

Show Details and Add Events

Coworkers can see detailed information about events in your calendar, and they can insert events in your calendar.

Full Access

Coworkers can see detailed information about events in your calendar, insert events, and edit existing events.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal, Group**, and **Contact Manager** Editions

EDITIONS

Available in Salesforce Classic in: **All** Editions except **Personal**, **Group**, and **Contact Manager** Editions

USER PERMISSIONS

To create events

Edit Events

View a Coworker's Calendar in Salesforce Classic

When coworkers share their calendars with you, you can view the calendars in Salesforce Classic.

Your access to view event details, edit events, or create events varies by calendar. Your access to a given calendar depends on how your Salesforce admin sets up your org and the calendar sharing options that your coworker has chosen.

You can view all events owned by people below you in the role hierarchy.

• In day, week, or month view, click **Change** next to the name at the top of the calendar, then select the calendar that you want to view.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal** Edition

Calendar Views

Calendar views display your events in Salesforce.

1. Calendar Views in Lightning Experience

Your calendar displays all events that you own in Salesforce on the My Events Calendar. Calendars that you create from a Salesforce object display data in date fields as calendar items. View, create, and edit your events in a day, week, or month view. You can also see any calendars shared by colleagues that you've added to your view.

2. Calendar Views in Salesforce Classic

Calendar views display your own calendar and coworkers' calendars along with list views of open tasks. On the Home tab, the Calendar section shows upcoming events, a date picker for the month, and links to other calendar and activity views. You can share your calendar with coworkers and print calendars and task lists.

Calendar Views in Lightning Experience

Your calendar displays all events that you own in Salesforce on the My Events Calendar. Calendars that you create from a Salesforce object display data in date fields as calendar items. View, create, and edit your events in a day, week, or month view. You can also see any calendars shared by colleagues that you've added to your view.

Watch a demo: Calendars are Better in Lightning! (English Only)

SEE ALSO:

Calendar Sharing in Lightning Experience

Considerations for Using Events and Calendars in Lightning Experience

Calendar Views in Salesforce Classic

Calendar views display your own calendar and coworkers' calendars along with list views of open tasks. On the Home tab, the Calendar section shows upcoming events, a date picker for the month, and links to other calendar and activity views. You can share your calendar with coworkers and print calendars and task lists.

Where to Select or Switch Views

You access calendar views in the following locations.

EDITIONS

Available in Lightning Experience

Available in: **All** Editions except **Group** or **Contact Manager** Editions

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: **All** Editions except **Group**, **Essentials**, or **Contact Manager** Editions

• The Calendar section at the bottom of the Home tab. (If your Home tab doesn't display the Calendar section, ask your Salesforce admin to customize your home page layout.)

- The Calendar shortcut in the sidebar that opens your last used calendar view. (If your Salesforce admin has enabled the shortcut.)
- The detail page for an event or a task
- An activities list view

When you hover your mouse over an event that you have permission to access, an overlay displays event details and actions that you can perform. Your Salesforce admin configures the content of the overlays.

Day, Week, Month, and Activity Views

Calendar views display events as follows:

- A day at a time: 1 or Today
- A date that you choose using
- A week at a time: 7 or This Week
- In a week view, with or without weekends
- A month at a time: 31 or This Month
- On a day that you choose: Click in the week or month view
- In a list of activities (events and tasks):

Inside any calendar view, you can switch views by clicking the icon for a different view. In a week or month view, click a date to see that day's view.

Single-User View and Views of Other Calendars

The single-user view () displays up to 1,000 events in one month in any of the following:

- Your own calendar
- The calendar of another user (not available in Personal Edition)
- A public calendar
- A resource calendar

Click **Change** to switch users or calendars. Click **Share My Calendar** to allow other users to view your calendar. To reset your view to your own calendar, click **Back to My Calendar**.



All single-user day and week views of a user's calendar display a list of the user's open tasks alongside the calendar. A drop-down list lets you choose other views, for example overdue tasks or tasks due today.

By default, your daily and weekly calendar views display the range of hours specified as Start of Day and End of Day on your Personal Information page.

If you sync events from Outlook using Salesforce for Outlook, you see a banner at the top of your calendar. The banner is linked to a list of your unresolved events: synced Outlook events that haven't been assigned to Salesforce records.

Multi-User View

The multi-user view () displays several users' calendars and activities together. Choose an existing list view of users from the **View** drop-down list or click **Create New View**.

The view shows each person's availability. A legend in the view shows busy and out-of-office time. If an event is set to show the time as free, then multi-user views don't display it.

Consider these limitations of the multi-user view:

- Drag-and-drop editing isn't available in the multi-user view.
- The multi-user calendar works differently in the partner portal. For example, partners can view events only on the calendars of people in their own company and their channel manager.

Printable View

After you select a view and click **Printable View**, adjust the view before printing it.

- To send the printable view to a printer, click Print This Page.
- To change the dates before printing, click , , , Today, This Week, or This Month.
- In a day or week view, select a different task list view if you like.
- In multi-user views, in the **Sort by** drop-down list, select Time to include all users' events on a single calendar. Or select User to display a separate calendar for each user.

Considerations for Using Events and Calendars

Salesforce always displays an event's date and time in the time zone you've chosen in My Settings. Working with meetings and scheduling is different in Lightning Experience and Salesforce Classic.

1. Considerations for Using Events and Calendars in Lightning Experience

When you use events and calendars in Lightning Experience, keep in mind these considerations for creating, updating, and owning events and other calendar items.

2. Considerations for Using Events and Calendars in Salesforce Classic

Be aware of these considerations for creating, updating, owning, and inviting others to events in Salesforce Classic.

Considerations for Using Events and Calendars in Lightning Experience

When you use events and calendars in Lightning Experience, keep in mind these considerations for creating, updating, and owning events and other calendar items.

EDITIONS

Available in Lightning Experience in: **All** Editions except **Personal** and **Contact Manager** Editions

Calendar

Business Hours

Calendars don't indicate the business hours selected in personal settings.

Calendar Views

You can't hide weekends in the Calendar view.

Event subjects display below event times in Calendar view. Subjects aren't visible for events lasting 30 minutes or less.

List View Filtering

No list views are available for filtering calendars based on the Events or Tasks objects. The list view shows all your tasks, open and closed, and all your events. For calendars created from other objects, list views with the scope My and All are supported, but list views with the scope My Team are not.

Calendar Item Limit

You can view up to 150 calendar items total in the day or week view, including Salesforce events and the items on calendars you create. Suppose that you select a calendar containing enough items to push the total past the limit in that view. Lightning Experience displays an alert and hides items on other calendars.

Calendar Sharing and Ownership

You can share your My Events calendar with your manager or other colleagues, but not with personal and public groups or roles. You can't share calendars that you've created from Salesforce objects.

Public Calendars and Resource Calendars

Admins can create and manage public and resource calendars in Lightning Experience but users can only view those calendars from Salesforce Classic.

Calendar Visibility for User-Created Calendars

When a user creates a calendar view from an object, only the user can see the calendar. Previously, anyone above the user in the hierarchy, or anyone with the "View All Data" permission, could see—and—delete, the calendar. This extensive visibility could cause slow response times.

Events

Activity Reminders

You can't set reminders from New Task or New Event global actions, even if your admin add the Reminder Set field to the global action layout. Lightning Experience activity reminders refresh every 10 minutes. As a result, users must save changes that impact reminders at least 10 minutes before reminders are scheduled. For example, if a user schedules a reminder to display 1 hour before an event, the user must save changes at least 1 hour and 10 minutes before the event to see those changes on the reminder. Otherwise, users can experience limitations such as: Users update their time zone settings and reminders display at the time scheduled in the original time zone. Or event organizers invite attendees outside of the refresh cycle and attendees don't get the reminder. Or, events can sync to Salesforce (from Google Calendar or Microsoft Exchange) outside of the refresh cycle and attendees don't get the reminder.

No Recurring Events

Lightning Experience doesn't support creating or editing recurring event series. However, users can view and edit individual occurrences of a series that was created in Salesforce Classic. Users can't edit recurring events created in Salesforce Classic by dragging them to new time slots on the Lightning Experience calendar.

Event Attendees

Lightning Experience offers event attendees, which are similar to event invitees in Salesforce Classic, with a few differences.

To invite or remove attendees from events in Lightning Experience:

- Users require an account with a Microsoft® Exchange or G Suite calendar application that supports Lightning Sync. See Lightning Sync System Requirements in Salesforce Help.
- Admins have to set up Lightning Sync for users with the sync direction Sync Both Ways, Salesforce to Google, or Salesforce to Exchange. These sync directions limit some Salesforce Classic functionality. See Considerations for Using Events and Calendars in Salesforce Classic in Salesforce Help.
- Admins have to add the Attendees field to the Event page layout or the quick actions layout for events. The Attendees field isn't supported for Compact Layouts.
- Meeting organizers have to create or edit events from Lightning Experience, any of the Salesforce apps, or (if syncing both ways),
 their Microsoft or Google calendars. If meeting organizers create or edit records in Salesforce Classic, they can't work with the
 attendees field and events don't sync.

To see attendees on events and for attendees to sync between Microsoft or Google and Salesforce:

• Users require an account with a Microsoft® Exchange or G Suite calendar application that supports Lightning Sync. See Lightning Sync System Requirements in Salesforce Help.

- Admins have to set up users to sync in any direction using Lightning Sync for Google or Lightning Sync for Microsoft Exchange.
 These sync directions limit some Salesforce Classic functionality. See Considerations for Using Events and Calendars in Salesforce Classic
- Admins have to add the Attendees field to the Event page layout or the quick actions layout for events. The Attendees field isn't supported for Compact Layouts.
- Meeting organizers have to create or edit events from Lightning Experience, any of the Salesforce apps, or (if organizers are syncing both ways), their Microsoft or Google calendars. If meeting organizers create or edit records in Salesforce Classic, they can't work with the attendees field and events don't sync.

Event Duration

When you edit event start dates or times, the event's end dates and times are updated automatically only in particular cases, and don't always maintain their original duration. To make sure that events maintain the intended duration, verify event end dates and times after making changes to start dates or times.

Recurring Events

Lightning Experience doesn't support creating or editing recurring event series. However, users can view and edit individual occurrences of a series that was created in Salesforce Classic. Users can't edit recurring events created in Salesforce Classic by dragging them to new time slots on the Lightning Experience calendar.

Dragging to Edit Events

Users can drag events and other records they've added to calendars to edit them on the Lightning Experience calendar. However, users can't drag a contact or lead onto the calendar to create a meeting with that person. Users also can't drag an all-day event to a time slot to add start and end times, and vice versa. Though users can see recurring events created in Salesforce Classic on the Lightning Experience calendar, they can't drag those events to edit them. No admin setup is required to turn on calendar dragging in Lightning Experience.

Event Invitations

To send event invitations for Lightning Experience events:

- Users require an account with a Microsoft® Exchange or G Suite calendar application that supports Lightning Sync. See Lightning Sync System Requirements in Salesforce Help.
- Admins have to set up Lightning Sync for users with the sync direction Sync Both Ways, Salesforce to Google, or Salesforce to Exchange. These sync directions limit some Salesforce Classic functionality. See Considerations for Using Events and Calendars in Salesforce Classic in Salesforce Help.
- Admins have to add the Attendees field to the Event page layout or the quick actions layout for events. The Attendees field isn't supported for Compact Layouts.
- Meeting organizers have to create or edit events from Lightning Experience, the Salesforce app, or their Microsoft or Google Calendar. If meeting organizers create or edit records in Salesforce Classic, they can't work with the attendees field and events don't sync.

Invitations initiated in Lightning Experience are emailed from Microsoft® Exchange or Google Calendar™. Attendees can accept or decline event invitations from those email or calendar applications only. Attendee responses then sync to Salesforce so that other attendees can see attendance status.

Export Events

You can't create an event for another calendar application using the Export Event (formerly Add to Outlook) button. However, if you're set up to sync events using Lightning Sync, events you create and edit from Lightning Experience or any of the Salesforce apps sync to Microsoft® calendars or Google Calendar™ automatically.

Follow-Up Events

Lightning Experience doesn't display the **Create Follow-Up Event** button for creating an event on a record. Instead, the composer on a record for an opportunity, a lead, an account, or a contact prefills the Name and Related To fields on events.

The ability to create a new task reusing some event fields (**Save and New Event**) and create a new event reusing some Task fields (**Save and New Task**) is limited to Salesforce Classic.

Events Generated from the API

In any event list generated through the API and including one or more attendees, the Assigned To field contains the attendee instead of the event owner.

Considerations for Selecting Attendee Features by Lightning Sync Setting

Admins can select these Lightning Sync settings to give reps access to certain attendee features in Lightning Experience and all versions of the Salesforce app.

Considerations for Selecting Attendee Features by Lightning Sync Setting

Admins can select these Lightning Sync settings to give reps access to certain attendee features in Lightning Experience and all versions of the Salesforce app.

Admins can select these Lightning Sync settings to give reps access to certain attendee features.

| These people | Can do these things with attendees and event invitations | From these applications | If admins select this sync direction for Lightning Sync |
|---|---|---|--|
| Event organizers | Add or remove attendees | Lightning Experience, any version of the Salesforce app, or (if syncing both ways) supported Microsoft Exchange or Google calendars | Sync both ways, Salesforce to Google, or Salesforce to Exchange |
| Salesforce users with access to view an event | See attendees and their attendance status on the event | Lightning Experience, any version of the Salesforce app, or supported Microsoft Exchange or Google calendars | Any sync direction |
| Contacts, leads, or other Salesforce users working from supported versions of Microsoft Exchange and Google Calendar | Respond to event invitations | Their Microsoft Exchange or Google calendars | No specific sync direction required |

EDITIONS

Available in: Lightning Experience and all versions of the Salesforce app

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

Considerations for Using Events and Calendars in Salesforce Classic

Be aware of these considerations for creating, updating, owning, and inviting others to events in Salesforce Classic.

Event Editing

Permission to Edit Other People's Events

Your org's calendar sharing model and your personal calendar sharing control permission to edit other people's events. However, regardless of these settings, managers in the role hierarchy can always edit events owned by people who report to them.

EDITIONS

Available in Salesforce Classic in: **All** Editions

Events with invitees not available in: **Personal** Edition

Permission to Edit Public Calendars and Resource Calendars

The calendar sharing model controls permission to edit events in public and resource calendars.

Changes to Fields in Single Events and Their Series

If you change a field in a single event and then change that field in the series, the series change overrides the change to the single event.

Changes to Events with Invitees

If you change the following fields for events that include one more more invitees, invitees' statuses are reset to Not Responded.

- All-day event checkbox
- Start or end time
- Location

Event Deletion

Declining Event Invitations

If you decline an event that you've been invited to, Salesforce removes the event from your calendar. Only the event owner can delete an event with invitees.

Notification for Deleted Event Series

If an event owner deletes a series of recurring events, every invitee receives an email notification that the series of events has been canceled.

Handling of Past and Future Events in Deleted Series

If you delete a series of events, you delete only future events. Events that have already happened aren't affected.

If a series is deleted and it contains events that occurred in the past, the series isn't moved to the Recycle Bin. As s a result, the series can't be restored from the Recycle Bin.

If a series is deleted and it doesn't contain past events, Salesforce moves the series to the Recycle Bin. Individual events that were part of the series aren't moved to the Recycle Bin.

Handling of Series Restored from Recycle Bin

If you restore a series from the Recycle Bin, single events are created. Those single events contain both the details defined by the series and any changes or additions made to them individually before the series was deleted.

Deleted Public Calendars

If you delete a public calendar, Salesforce doesn't put it in the Recycle Bin.

Recurring Events (_____)

Effects of Changes to an Event Series and Single Events in a Series



Warning: Changes to any fields in an event series overrides changes previously made to single events.

If you change the following settings, the status of invitees for future events is reset to Not Responded. You lose messages sent with invitees' responses and other changes to single future events. Triggers and workflows are also reset, and links to future events break.

- All-day event checkbox
- Start or end time
- Location
- Recurrence frequency
- Recurrence start or end date, if you send updates to invitees

If you don't send updates, and you only extend the recurrence end date, then future events aren't affected.

Display of Original and New Start or End Time for a Changed Series

If the organizer changes the scheduled time of an event in a recurring series, the calendar views and the Home tab's Calendar section show the updated time. However, the detail page of the single event continues to show you the original time until you accept or decline the series.

Maximum Number of Single Events in a Series

- Daily: 100
- Weekly: 53
- Monthly: 60
- Yearly: 10

Click Calculate max end date to enter the maximum end date allowed for the frequency that you selected.

Duration of Events

If your Salesforce admin has enabled multiday events, then you can create events up to 14 days long, except recurring events. When you create a recurring event, the maximum duration of the single events in the series is 24 hours. After you create the series, you can change the duration to up to 14 days if your Salesforce admin has enabled multiday events.

Event Reminders

If you create a recurring event and you leave the reminder checkbox selected, you receive a reminder for each single event in the series.

Attachments to Events

You can attach files to a series of recurring events. After you create a series, you can add or delete attachments to each single event in the series.

Attachments are displayed on the event detail page only, not on the detail page for other records that the event is related to. If you don't see the Attachments related list on the event detail page, ask your Salesforce admin to add it to the event page layout.

Inviting People and Scheduling Resources

Access Requirements for Inviting People and Resources

You need at least read access to the contacts and leads that you invite to an event. You need at least "Add Events" on a resource to invite it to an event.

Permission to Edit Events with Invitees

🚉 identifies an event with one or more invitees. You can edit an event that you've invited people to only if you own the event. If the event isn't a recurring event, you can assign it to a different person.

If you want to send an email update, you can send it to all invitees or only to the people you added or deleted during editing.

Event Attendance

Declining an event removes it from your calendar. The event owner doesn't receive an email notification when an invitee accepts or declines an invitation

Maximum Number of Invitees

The maximum number of invitees for regular events is 1,000. However, for recurring events, the maximum is 100.

Relating Events to Multiple Contacts (Shared Activities)

Maximum Number of Related Contacts

You can relate an event to up to 50 contacts (but only one lead) in the Name field, including one primary contact. If you don't see



 $lap{N}$ next to the Name field, ask your administrator to enable Shared Activities.

No Support for Recurring Events or Multiple Event Owners

You can't relate multiple contacts to a recurring event series or an event owned by multiple people.

Assigning Events to Coworkers

Default Event Owner

By default, an event is assigned to the user who creates it. To assign independent copies of a new event to multiple people, click

next to **Assigned To**. Inn the window that opens, click the Multiple Users tab. The Assigned To field isn't available in Personal Edition.

Events in Chatter

New Events in Chatter Feeds

If a new event is related to a record like a lead, account, or custom object, the event appears in the feed for that record. On any record that you follow, you see feed items for all events, regardless of who created them.

Creating Events in Feeds

Your Salesforce admin specifies whether you can use Chatter to create events for different types of records. For example, some people can view but not create events in the feeds for accounts that they have access to.

No Recurring Events in Chatter

Your Chatter feed doesn't display recurring events, either in series or singly, and you can't follow recurring events in Chatter.

Reminders

No Reminders from Global Actions

You can't set reminders from New Task or New Event global actions, even if your admin add the Reminder Set field to the global action layout.

Attendees and Lightning Sync

To work with event attendees in Lightning Experience or the Salesforce app, your admin is also required to set up Lightning Sync. If you're set up with the sync directions Sync Both Ways, Salesforce to Google, or Salesforce to Exchange, some Calendar functionality in Salesforce Classic is limited.

- Users can only see event attendees in Salesforce Classic.
- Users can add or remove attendees from Lightning Experience or the Salesforce app.
- The Multi-View Calendar is disabled.

Events Generated from the API

Assigned To Field

In any event list generated through the API and including one or more invitees, the Assigned To field contains the invitee instead of the event owner.

SEE ALSO:

Calendar Views in Salesforce Classic

Considerations for Syncing Events from Your Calendar Application to Salesforce Only

Scheduling and Invitations in Salesforce Classic

Reps can invite people to meetings and see meeting responses in Lightning Experience, Salesforce Classic, and the Salesforce app. Reps can also accept meeting invites and create a Microsoft® Outlook® appointment for an event in Salesforce Classic.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal** Edition

- Invite People to an Event and Schedule Resources in Salesforce Classic Invite users, contacts, and leads to a meeting, and schedule meeting resources.
- 2. Quickly Schedule a Meeting About an Account, a Contact, or a Lead in Salesforce Classic

Drag-and-drop scheduling lets you schedule events related to accounts, contacts, and leads without leaving the list view page. You drag records from list views onto weekly calendar views and enter the details of the event in an overlay.

- 3. Export Events to Other Calendar Applications from Salesforce Classic
 - Export an event from the event detail page so that you can import it into Microsoft $^{\circ}$ Outlook $^{\circ}$, Google Calendar $^{\circ}$, or any calendar application that supports .ics files.
- 4. Create an Event in a Public Calendar in Salesforce Classic

A public calendar contains a schedule of events that is available to a group of users, such as a sales events calendar for a sales department. If your Salesforce admin has set up a public calendar and you're assigned to that group, you can view the calendar. You can also add an event just as you would add an event to your own calendar.

5. Respond to Event Invitations

You accept or decline an event invitation differently depending on whether the event organizer invited you from Salesforce Classic or Lightning Experience.

Invite People to an Event and Schedule Resources in Salesforce Classic

Invite users, contacts, and leads to a meeting, and schedule meeting resources.

.

- 1. On the Event detail page, in the Select Invitees section, click **Select**.
- 2. In the Select Invitees dialog box, search for the type of invitee: users, leads, contacts, or resources.
- 3. Enter a name or part of a name or leave the field blank to expand the search. Click **Find**.
- 4. Use and to select and deselect people or resources. To invite more people or resources, search again and select the invitees you want.
- 5. Click Done.
- 6. Review the calendar of each invitee and adjust the date and time of the event if necessary.

 The availability of invitees is indicated in color on their calendars: busy time is blue and out-of-office time is red. If an invitee has more than one event scheduled for a particular time, all the events are shown on the calendar. To see the details of an event, hover your mouse over the event on the calendar.
- 7. To remove an invitee from an event, click **Remove** next to the invitee's name.
- 8. Click Save & Send Update.

Invited leads, contacts, and person accounts receive an email containing a link to a web page. They can accept or decline the invitation for the event or event series. You also receive an email summary of the event. If an invited resource is available at the given time, the resource automatically accepts the invitation.

Quickly Schedule a Meeting About an Account, a Contact, or a Lead in Salesforce Classic

Drag-and-drop scheduling lets you schedule events related to accounts, contacts, and leads without leaving the list view page. You drag records from list views onto weekly calendar views and enter the details of the event in an overlay.

If you don't see the **Topen Calendar** link, ask your administrator to enable drag-and-drop scheduling.

- 1. Click the **open Calendar** link at the bottom of a list view. A weekly view of a calendar appears below view.
- 2. Drag a record from the list to a time slot on the calendar. A popup window for creating an event appears. The event is already related to the record that you dragged from the list view.
- The ___Open Calendar link appears only at the bottom of list views for accounts, contacts, and leads.
- Drag-and-drop scheduling isn't available for the Console tab, events that people have been invited to, recurring events, accessibility mode, or Connect Offline.
- List views that include drag-and-drop scheduling can take slightly longer than usual to be displayed.
- When you drag the bar in between the list and calendar to resize either one, the size is saved for all views in which you use drag-and-drop scheduling. You can resize the list and calendar at any time.

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal**Edition

USER PERMISSIONS

To invite people to an event:

Edit Events

They can accept or decline the invita

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal**

USER PERMISSIONS

To enable drag-and-drop scheduling:

Customize Application

To create events:

Edit Events

USER PERMISSIONS

To create events:

Edit Events

Export Events to Other Calendar Applications from Salesforce Classic

Export an event from the event detail page so that you can import it into Microsoft $^{\circ}$ Outlook $^{\circ}$, Google Calendar $^{\infty}$, or any calendar application that supports .ics files.

The .ics file format retains these event details:

- Full UTF-8 encoding for multi-language support
- Last modified and created dates
- Reminder settings and details

To export an event, follow these steps.

- 1. On the detail page for an event, click **Export Event**.
- 2. Save the file to your computer as an .ics file.
- 3. Follow the instructions supplied by your other calendar application to import the event into that calendar.

SEE ALSO:

Learn About Lightning Sync for Microsoft® Exchange Features Lightning for Outlook

Create an Event in a Public Calendar in Salesforce Classic

A public calendar contains a schedule of events that is available to a group of users, such as a sales events calendar for a sales department. If your Salesforce admin has set up a public calendar and you're assigned to that group, you can view the calendar. You can also add an event just as you would add an event to your own calendar.

- 1. On a calendar view, click [Change] to switch to a public calendar.
- 2. Choose the time and date of the event:
 - On the day view, click a time such as **9:00 AM** to add an event.
 - On the week or month view, click _ to add an event on a particular date.
- 3. Enter the details of your event.
- **4.** Click **Save**. Alternatively, click **Save & New Task** to save the event and begin creating a task, or **Save & New Event** to save and begin creating an event.

Respond to Event Invitations

You accept or decline an event invitation differently depending on whether the event organizer invited you from Salesforce Classic or Lightning Experience.

Respond to Event Invitations Sent from Lightning Experience or the Salesforce App

When a coworker invites you to an event, you receive an email containing a link to the event. Invitations initiated from Lightning Experience and the Salesforce app are emailed from Microsoft® Exchange or Google Calendar™. Working with attendees in Lightning Experience requires you to sync events with those systems. Accept or decline event invitations from those emails or those calendar applications only. Your responses then sync to Salesforce so that other attendees can see your attendance status.

EDITIONS

Available in Salesforce Classic in: **All** Editions

EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal, Essentials**, and **Group** Editions

USER PERMISSIONS

To create an event in a public calendar:

Edit Events

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **All** Editions except **Essentials**, **Personal Edition**. and **Database.com**

Respond to Event Invitations Sent from Salesforce Classic

When a coworker invites you to an event, you receive an email containing a link to the event. Invitations initiated in Salesforce Classic are emailed from Salesforce. Accept or decline invitations from the event record.

SEE ALSO:

Export Events to Other Calendar Applications from Salesforce Classic

Respond to Event Invitations Sent from Lightning Experience or the Salesforce App

When a coworker invites you to an event, you receive an email containing a link to the event. Invitations initiated from Lightning Experience and the Salesforce app are emailed from Microsoft® Exchange or Google Calendar™. Working with attendees in Lightning Experience requires you to sync events with those systems. Accept or decline event invitations from those emails or those calendar applications only. Your responses then sync to Salesforce so that other attendees can see your attendance status.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **All** Editions except **Essentials**, **Personal Edition**, and **Database.com**

Respond to Event Invitations Sent from Salesforce Classic

When a coworker invites you to an event, you receive an email containing a link to the event. Invitations initiated in Salesforce Classic are emailed from Salesforce. Accept or decline invitations from the event record.

- 1. Click the event description.
- 2. If the event is a single event, click **Accept Meeting** or **Decline Meeting**. If you're invited to a series of events, click **Accept Series** or **Decline Series**.
 - Ø

Note: If you want to attend some events in a series of events but decline the others, accept the series and then decline specific events.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **All** Editions except **Essentials**, **Personal Edition**, and **Database.com**

Things to Know About Activities

Review additional considerations for activities.

Considerations for Enabling Shared Activities

If you enable shared activities, or if it's enabled by default in your Salesforce org, you can't disable it.

EDITIONS

Available in: All Editions

Considerations for Disabling Roll Up of Activities to a Contact's Primary Account

When an activity is associated to a contact using the Related To field, the activity is also displayed under the contact's primary account. Before deciding whether to change this default rollup behavior, review some considerations, including how it affects activities, person accounts, and opportunities.

Guidelines for Tracking Activities

Review guidelines for tracking tasks and events, including how activity access is determined, how record-activity relationships work, and how the last activity date on a record is determined.

EDITIONS

Classic

Available in Lightning Experience and Salesforce

Available in: Essentials.

Professional, Enterprise,

Performance, Unlimited,

and **Developer** Editions

Considerations for Enabling Shared Activities

If you enable shared activities, or if it's enabled by default in your Salesforce org, you can't disable

- If a Visualforce page uses the standard controller to display Shared Activities events, use API version 26.0 or later.
- You can't relate a task or event to additional contacts if it's already related to a lead.
- When more than one contact is related to an event, activity reports don't show child events to that event if they are assigned to users who aren't below you in the role hierarchy.
- If you enable Shared Activities, then an activity is also related to each contact's primary account.
- If you enable Shared Activities, the last activity date on account records is based on the activities that roll up to the account via the Related To field. However, if the Related To field

is blank, the activities are based on the primary contact's account. The last activity date for contacts and leads is based on only the activities where the contact or lead is the primary contact on the activity.

- If you enable Shared Activities, users must designate one contact as the primary contact on the activity. If you delete the primary contact, the next contact on the activity's related list becomes the new primary contact. Or you can manually edit the activity to select a primary contact. Lists and reports display primary and secondary contacts differently.
- If you don't enable Shared Activities, custom reports based on activity relationships:
 - Show only invitees to an event but not the organizer.
 - Don't show events to which no one has been invited.
- If you don't enable Shared Activities, custom report types that use activity custom lookup field relationships aren't supported.
- If you don't enable Shared Activities and a sales rep sends an email to multiple contacts, Salesforce creates a closed task for each contact. As a result, Salesforce creates duplicate records instead of just one task corresponding to the email.

Considerations for Disabling Roll Up of Activities to a Contact's Primary Account

When an activity is associated to a contact using the Related To field, the activity is also displayed under the contact's primary account. Before deciding whether to change this default rollup behavior, review some considerations, including how it affects activities, person accounts, and opportunities.

When you change the roll up setting, only new activities are affected. Existing activities are only affected if they're updated in a way that causes the roll up to be recalculated, such as when an activity is closed.

The activity's Related To field determines which account an activity will roll up to. The activity doesn't roll up to the primary account of the contact that's specified in the Name field. **EDITIONS**

Available in: Liahtnina Experience and Salesforce Classic

Available in: All Editions

- Activities that roll up to an account via the Related To field determine the last activity date on the account. The Name field on activities is always ignored when determining an account's last activity date.
- In Salesforce Classic, changing the rollup behavior doesn't affect person accounts. When an activity is related to a person account via either the Related To field or the Name field, the activity will always appear on the person account record. That's because a person account is its own primary account.
- If you create an activity while converting a lead but don't create an opportunity from the lead, the activity doesn't roll up to the lead's primary account regardless of what's specified by the activity rollup setting.

SEE ALSO:

Contacts to Multiple Accounts

Guidelines for Tracking Activities

Review guidelines for tracking tasks and events, including how activity access is determined, how record-activity relationships work, and how the last activity date on a record is determined.

Record and Activity Relationships

An activity's Related To field helps determine an activity's relationship to an account.

| Content of the Related To Field | Record That the Activity Rolls Up To |
|---|--|
| An account | That account |
| An opportunity | The account on that opportunity |
| A contract | The account on that contract |
| A custom object with master-detail relationship with the account object | The account on that custom object record |
| Something other than the above, including empty | The contact's primary account |

EDITIONS

Available in the Salesforce app, Salesforce Classic, and Lightning Experience

Available in: All Editions

If Shared Activities is enabled, then an activity is also related to each contact's primary account.

Last Activity Date

- The last activity date for a record is either the due date of the most recently logged event against the record or the most recently closed task associated with the record.
- The last activity date for an account record is based on all the activities that roll up to the account via the Related To field. For an account, the last activity date can represent an activity that's related to an opportunity. The last activity date for a contact or lead is based on all the activities that are related to that contact or lead via the Name field.
- If Shared Activities is enabled, an account's last activity date is still based on the activities that roll up to the account via the Related
 To field. But if the Related To field is blank, the activities are based on the primary contact's account. The last activity date for contacts and leads is based on only the activities where the contact or lead is the primary contact on the activity.

Activity Access

Your access to other people's events and tasks is based on your:

- **Role**—You have access to view and edit your own activities plus activities assigned to people below you in the role hierarchy.
- **Sharing Model**—When the activity sharing model is "Controlled By Parent," people with "View All" permission for the type of object on the related record can view the activity.

You can view an activity if:

- You're assigned to the activity
- You're above the user assigned to the activity in the role hierarchy
- You have at least read access to the record to which the activity is related
- You have the "View All Data" permission

Sales Productivity Activity Timeline

• You have the "View All" object-level permission for at least one contact and the related opportunity, account or case, and Shared Activities is enabled

• You have the "View All" object-level permission for the related opportunity or account, where the sharing model applied to the record is "Controlled By Parent", and Shared Activities isn't enabled

You can edit or delete an activity if:

You have the "Edit Tasks" and "Edit Events" permissions

You're assigned to the activity

OR

AND

• You're above the user assigned to the activity in the role hierarchy

OF

- You have the "Modify All" object-level permission in the related record, where the record's sharing model is "Controlled By Parent."
 (with Shared Activities enabled, you need the "Modify All" object-level permission for at least one contact and the related record)

 OR
- You have the "Modify All Data" permission

Activity Timeline

In Lightning Experience, records don't show the Open Activities and Activity History related lists. Instead, track your activities in the activity timeline, which is supported for accounts, contacts, contracts, leads, opportunities, and activity-enabled custom objects.

Activity Timeline Customization Considerations

Explore the changes you can make to the activity timeline.

Activity Timeline Filters

Use the filters on the activity timeline to narrow down what's visible, focus on what's important, and find what you're looking for.

EDITIONS

Available in Lightning Experience in: Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions

Activity Timeline Customization Considerations

Explore the changes you can make to the activity timeline.

The items in the activity timeline are in order of due date. Tasks and all-day events have a due date of midnight.

On the detail page for objects that support activities, Lightning Experience doesn't display Open Activities or Activity History along with other related lists. It displays the activity timeline instead.

In some Salesforce orgs, page layouts or record types need adjustments to prevent tabs from disappearing from the activity composer. Also, if you customize the display and order of fields in the activity timeline, be aware of the behavior of certain fields.

EDITIONS

Available in Lightning Experience in: Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions

You can customize the activity timeline using the Lightning App Builder. To represent all activities from future to past, the activity timeline displays open activities in the opposite order from the Open Activities related list. Under Next Steps, the timeline displays open activities in chronological order from top to bottom. Undated tasks appear at the top and overdue tasks appear last.

Sales Productivity Activity Timeline

Activity Summary

The second row of an activity in the activity timeline is a summary of the activity. Key fields provide a quick context about the activity.



Note: The activity timeline's summary for emails saved as tasks is enriched when Enhanced Email is turned on. There are limitations in the activity timeline when logging emails as tasks from Lightning for Outlook and Inbox.

Display and Order of Fields

In the activity timeline, you can customize the display and order of fields when an activity is expanded for events, tasks, and logged calls. Do this customization using event and task compact layouts. Even if you remove certain fields from a compact layout, they remain in the activity timeline because they contain essential activity information. For example, suppose that you remove the due date, the date and time, or the task status fields from a compact layout. The event start date and time, the task checkbox, the task due date, and the call logging date still appear on activities in the timeline. The description field for events and the comments field for tasks also always appear in the timeline, although they aren't available in the compact layout. The remaining fields visible in the timeline reflect the fields you include in the compact layout.

Task and Event Compact Layouts

For compact layouts for tasks and events, these considerations also apply:

- The first field is always skipped
- If a record doesn't have data for a field, the field is skipped

Icons

The icons for activity types (events, tasks, calls, and email) in the timeline aren't customizable.

SEE ALSO:

Lightning Experience Pro Tip: Tailor the Activity Timeline for Your Lightning Experience Users

Activity Timeline Filters

Use the filters on the activity timeline to narrow down what's visible, focus on what's important, and find what you're looking for.

Activities to Show

This option in the activity timeline filter narrows down which activities are shown.

My activities

Shows activities where you are involved, either as the owner or as a participant. For example, you are the owner of an email you sent or an event you organized. You are involved in an activity when you are, for example, in the CC or BCC fields of an email, or the attendee of an event.

All activities

Shows all activities you have sharing access to, even if you're not involved.

EDITIONS

Available in Lightning Experience in: **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Activity Reminders and Notifications

Salesforce displays event and task reminders in a reminder window. The reminder window opens whenever a reminder is triggered. When you log in, a sound plays if you have reminders that have been triggered since the last time you logged in. You can customize reminders in your personal settings.

Information in Reminder Windows

- Up to 100 of the oldest reminders that you haven't dismissed
- The type of activity—event or task
- The activity subject (click to see activity details)
- When the event is scheduled to start or the task is due
- When the reminder is due or that the reminder is overdue

EDITIONS

Available in Lightning Experience, the mobile app, and Salesforce Classic in: **All** Editions Except

Database.com

Order of Reminders

Event reminders are sorted by start date and time, and task reminders are sorted by due date. If the option Sort reminder window by due date is *not* set, the window displays reminders in the following order:

- 1. The task and event reminder date and time.
- **2.** The task due date *or* the event start date and time.
- **3.** Ascending alphabetical order by subject.

If Sort reminder window by due date is set, the reminders are displayed in the following order:

- 1. The task due date or the event start date and time; if the task has no due date, then the reminder window displays it first
- 2. The task and event reminder date and time
- 3. Ascending alphabetical order by subject

Display of Dates and Times

The table shows how reminders display the event start time or task due date.

| Activity Type | Due Date or Time That You Specified | Due Date or Start Time Shown in the Reminder |
|---------------|--|---|
| Event | An event time | The date and time that you selected when you created or edited the event |
| | An all-day event | The date that you selected and the time set for Start of day in your Personal Information Settings page |
| Task | A due date | The date that you selected when you created or edited the task |
| | No due date | The value None |

Customizable Reminder Settings

Follow these steps to customize your reminder settings.

- 1. From your personal settings, enter Reminders in the Quick Find box, then select Activity Reminders.
- **2.** Change the settings as desired.

Table 9: Reminder Settings

| Setting | Result When Setting Is Enabled |
|--|---|
| Show reminders | The reminder window opens when a reminder is due. |
| Play reminder sounds | Salesforce plays a reminder sound when a reminder is due. |
| Set default event reminders to: | Salesforce sets a reminder on all new events. You choose the amount of time before the event start time when you want a reminder; the default is 15 minutes. You can disable the reminder or change the reminder time when you edit an event. |
| Set default task and all-day event reminders to: | Salesforce sets a reminder on all new tasks. You choose the date and time when you want task reminders; the default is 8:00 AM the day that a task is due. You can disable the reminder or change the reminder time when you edit a task. |
| Sort reminder window by due date | Salesforce sorts reminders by due date first and then by the reminder date and time. |

If Salesforce doesn't display reminders that you've set, make sure that your browser isn't blocking pop-ups. To test your settings, click **Open a Test Reminder** in the Does Your Browser Block Reminders? section.

Snoozing Reminders

You can snooze one or more reminders at a time. The default snooze option is to remind you again in 5 minutes.

If you click **Snooze** when Sort reminder window by due date is not selected, the time overdue is based on the snooze time when the reminder opens again. If you close the reminder window, it opens again when you're notified of the next reminder.

Dismissing Reminders

You can dismiss one or more reminders at a time. To dismiss all reminders in the window, click **Dismiss All**. If the number of reminders exceeded 100 before you clicked **Dismiss All**, then after you click **Dismiss All**, the window displays the additional reminders.

Disabling individual preferences for displaying event and task reminders erases users' activity reminder settings. If you re-enable activity reminders later, users receive reminders only for activities they create or edit after you re-enable the setting.

SEE ALSO:

Personalize Your Salesforce Experience

Sales Productivity View Archived Activities

View Archived Activities

Find and view the activities Salesforce has archived.

Salesforce archives these activities:

- Events that ended more than 365 days ago
- Closed tasks due more than 365 days ago
- Closed tasks created more than 365 days ago (if they have no due date)

Salesforce doesn't delete archived activities, but you can manually delete them.

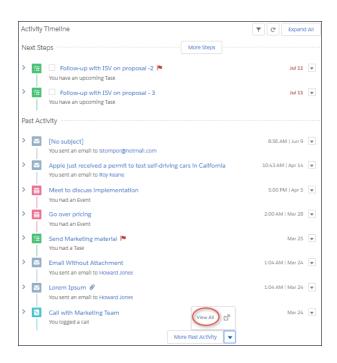
If you modify an archived activity, it is no longer considered archived. Salesforce will archive the activity again 365 days after the last modification.

When you create or refresh a sandbox, archived activities aren't copied.

You can view archived activities in exported data and in certain locations in Salesforce.

Lightning Experience

In the activity timeline, open the More Past Activity dropdown, and select View All.



The archived activities open in a new tab.

Note: Archived activities don't include activities from Einstein Activity Capture.

Salesforce Classic

View archived activities in these locations in Salesforce Classic:

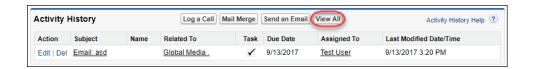
• In the Activity History related list or by clicking **View All**

EDITIONS

Available in Lightning Experience, Salesforce Classic, and all versions of the Salesforce app

Available in: All Editions

Sales Productivity Activities Reports



- In the printable view of the record in the Name or Related To field
- Using the URL for the activity, if you know it

Activities Reports

Run standard or custom reports that display details about your tasks or events and their related contacts, accounts, opportunities, and other associated records.

Report on the Primary Contacts for Activities

Create a custom report that shows the primary contact for each of your activities.

Report on the Number of Contacts Related to Activities in Salesforce Classic

Create a report that shows the number of contacts associated with each of your activities.

Report on Activities Related to Other Records in Salesforce Classic

Create a report that shows which customers sales reps are spending their time with.

Report on Contacts Related to Activities in Salesforce Classic

Create a report that shows all contacts related to each of your activities.

Report on Meetings with Customers

Create a custom report that shows which customers sales reps are spending their time with.

Report on the Primary Contacts for Activities

Create a custom report that shows the primary contact for each of your activities.

- 1. Click the **Reports** tab.
- 2. Click New Report....
- 3. Click New Custom Report Type.
- **4.** Expand the Activities folder.
- 5. Click Tasks and Events.
- 6. Click Create
- 7. Drag and drop the Contact field onto the report.
- **8.** Drag and drop other fields that you want to include in the report.
- 9. Click Run Report.
- 10. Save the report.



Sales Productivity Activities Reports

Report on the Number of Contacts Related to Activities in Salesforce Classic

Create a report that shows the number of contacts associated with each of your activities.

- 1. Click the **Reports** tab.
- 2. Click New Report....
- 3. Click New Custom Report Type.
- **4.** Expand the Activities folder.
- **5.** Click a report. (For example, click **Activities with Accounts**.)
- 6. Click Create
- 7. Drag and drop the Relation Count field onto the report.
- 8. Drag and drop other fields that you want to include in the report.
- 9. Click Run Report.
- **10.** Save the report.

EDITIONS

Available in Lightning Experience and Salesforce Classic

Available in: All Editions

USER PERMISSIONS

To run reports:

 Create and Customize Reports and Report Builder

Report on Activities Related to Other Records in Salesforce Classic

Create a report that shows which customers sales reps are spending their time with.

- 1. Click the **Reports** tab.
- 2. Click New Report....
- 3. Click New Custom Report Type.
- **4.** Expand the Activities folder.
- 5. Click a report. (For example, click **Activities with Accounts**.)
- 6. Click Create
- 7. Drag and drop the fields that you want to include in the report.
- 8. Click Run Report.
- **9.** Save the report.

EDITIONS

Available in Lightning Experience and Salesforce Classic

Available in: All Editions

USER PERMISSIONS

To run reports:

 Create and Customize Reports and Report Builder Sales Productivity Activities Reports

Report on Contacts Related to Activities in Salesforce Classic

Create a report that shows all contacts related to each of your activities.

- 1. Click the **Reports** tab.
- 2. Click New Report....
- 3. Click New Custom Report Type.
- **4.** Expand the Activities folder.
- 5. Click Activities with Contacts.
- 6. Click Create
- 7. Drag and drop at least 1 Contact field onto the report.
- **8.** Drag and drop other fields that you want to include in the report.
- 9. Click Run Report.
- **10.** Save the report.

Report on Meetings with Customers

Create a custom report that shows which customers sales reps are spending their time with.

- 1. From Setup, enter Report Types in the Quick Find box, then select Report Types.
- 2. If the Custom Report Type welcome page opens, click Continue.
- 3. Click New Custom Report Type.
- **4.** For Primary Object, select **Users**. Fill in the other required fields.
- 5. Click Next.
- **6.** Relate Users to Activity Relationships.
- 7. Click Save.
- 8. To define the fields for the report, click Edit Layout.
- **9.** To the layout, add several Activity Relationships fields: Date, Subject, Name, Related To, Relation Count.
- **10.** Change the label for the Name field to Contact. Change the Related To field to Opportunity.
- 11. Click Save.
- **12.** For each field, select the option to display the field by default.
- 13. Create a report.
- 14. In the Reports tab, select the report type that you created.
- **15.** Choose **Summary Format**, and create a grouping by Full Name.
- **16.** Run and save the report.

EDITIONS

Available in Lightning Experience and Salesforce Classic

Available in: All Editions

USER PERMISSIONS

To run reports:

 Create and Customize Reports and Report Builder

EDITIONS

Available in Lightning Experience and Salesforce Classic

Available in: All Editions

USER PERMISSIONS

To create, edit, and delete reports:

 Create and Customize Reports and Report Builder If Shared Activities isn't enabled, custom reports based on activity relationships don't include event organizers along with invitees. They also don't show events to which no one has been invited.

SEE ALSO:

Create a Custom Report Type

Design the Field Layout for Reports Created From Your Custom Report Type

Create a Report

Creating a Custom Report

Set Up Activities for Your Sales Reps

Optimize the way that your sales reps can manage events, calendars, and tasks.

1. Enable Shared Activities

With shared activities, users can relate up to 50 contacts (but only 1 lead) to an event or a task.

2. Considerations for Enabling Shared Activities

If you enable shared activities, or if it's enabled by default in your Salesforce org, you can't disable it.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: All Editions

3. Enable Roll Up of Activities to a Contact's Primary Account

When an activity is associated with a contact, the activity is also displayed on the contact's primary account. If you let users relate contacts to multiple accounts, we recommend deselecting this option.

4. Considerations for Disabling Roll Up of Activities to a Contact's Primary Account

When an activity is associated to a contact using the Related To field, the activity is also displayed under the contact's primary account. Before deciding whether to change this default rollup behavior, review some considerations, including how it affects activities, person accounts, and opportunities.

5. Enable Activity Reminders

Let users set individual preferences for displaying event and task reminders.

6. Add Send an Email, Log a Call, New Event, and New Task Buttons to the Activity Composer

If your page layouts have been customized and you don't see the Log a Call, New Event, New Task, or Send an Email buttons on the activity composer, you can add them. Just add the appropriate buttons to the Salesforce Mobile and Lightning Experience Actions section of page layouts.

Enable Shared Activities

With shared activities, users can relate up to 50 contacts (but only 1 lead) to an event or a task.

- From Setup, enter Activity Settings in the Quick Find box, then select Activity Settings.
- 2. Select Allow users to relate multiple contacts to events and tasks.
- 3. Click Submit.
- **4.** To show related contacts on event and task detail pages, ensure that the Name related list is included on event and task page layouts. The items in the Name related list aren't fields, so they don't adhere to field-level security settings.

After enablement, it can take up to 48 hours for shared activities to be ready. During this process, sales reps can continue working with events and tasks. The Activity Settings page in Setup displays messages about the status and what to do if the process doesn't finish.

EDITIONS

Available in Lightning Experience and Salesforce Classic

Available in: Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To enable shared activities:

 Customize Application and Modify All Data

Considerations for Enabling Shared Activities

If you enable shared activities, or if it's enabled by default in your Salesforce org, you can't disable it

- If a Visualforce page uses the standard controller to display Shared Activities events, use API version 26.0 or later.
- You can't relate a task or event to additional contacts if it's already related to a lead.
- When more than one contact is related to an event, activity reports don't show child events to that event if they are assigned to users who aren't below you in the role hierarchy.
- If you enable Shared Activities, then an activity is also related to each contact's primary account.
- If you enable Shared Activities, the last activity date on account records is based on the activities that roll up to the account via the Related To field. However, if the Related To field is blank, the activities are based on the primary contact's account. The last activity date for contacts and leads is based on only the

is blank, the activities are based on the primary contact's account. The last activity date for contacts and leads is based on only the activities where the contact or lead is the primary contact on the activity.

- If you enable Shared Activities, users must designate one contact as the primary contact on the activity. If you delete the primary
 contact, the next contact on the activity's related list becomes the new primary contact. Or you can manually edit the activity to
 select a primary contact. Lists and reports display primary and secondary contacts differently.
- If you don't enable Shared Activities, custom reports based on activity relationships:
 - Show only invitees to an event but not the organizer.
 - Don't show events to which no one has been invited.
- If you don't enable Shared Activities, custom report types that use activity custom lookup field relationships aren't supported.
- If you don't enable Shared Activities and a sales rep sends an email to multiple contacts, Salesforce creates a closed task for each contact. As a result, Salesforce creates duplicate records instead of just one task corresponding to the email.

EDITIONS

Available in Lightning Experience and Salesforce Classic

Available in: Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions

Enable Roll Up of Activities to a Contact's Primary Account

When an activity is associated with a contact, the activity is also displayed on the contact's primary account. If you let users relate contacts to multiple accounts, we recommend deselecting this option.

- From Setup, enter Activity Settings in the Quick Find box, then select Activity Settings.
- 2. Select Roll up activities to a contact's primary account.
- 3. Click Submit.

When you change the roll up setting, only new activities are affected. Existing activities are only affected if they're updated in a way that causes the roll up to be recalculated, such as when an activity is closed.

SEE ALSO:

Considerations for Disabling Roll Up of Activities to a Contact's Primary Account

EDITIONS

Available in Lightning Experience and Salesforce Classic

Available in: Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To enable roll up of activities to a contact's primary account:

 Customize Application and Modify All Data

Considerations for Disabling Roll Up of Activities to a Contact's Primary Account

When an activity is associated to a contact using the Related To field, the activity is also displayed under the contact's primary account. Before deciding whether to change this default rollup behavior, review some considerations, including how it affects activities, person accounts, and opportunities.

- When you change the roll up setting, only new activities are affected. Existing activities are only
 affected if they're updated in a way that causes the roll up to be recalculated, such as when an
 activity is closed.
- The activity's Related To field determines which account an activity will roll up to. The activity doesn't roll up to the primary account of the contact that's specified in the Name field.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: All Editions

- Activities that roll up to an account via the Related To field determine the last activity date on the account. The Name field on activities is always ignored when determining an account's last activity date.
- In Salesforce Classic, changing the rollup behavior doesn't affect person accounts. When an activity is related to a person account via either the Related To field or the Name field, the activity will always appear on the person account record. That's because a person account is its own primary account.
- If you create an activity while converting a lead but don't create an opportunity from the lead, the activity doesn't roll up to the lead's primary account regardless of what's specified by the activity rollup setting.

SEE ALSO:

Contacts to Multiple Accounts

Enable Activity Reminders

Let users set individual preferences for displaying event and task reminders.

- From Setup, enter Activity Settings in the Quick Find box, then select Activity Settings.
- 2. Select Enable Activity Reminders.
- 3. Click Submit.

EDITIONS

Available in Lightning Experience and Salesforce Classic

Available in: Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To enable activity reminders:

 Customize Application and Modify All Data

Add Send an Email, Log a Call, New Event, and New Task Buttons to the Activity Composer

If your page layouts have been customized and you don't see the Log a Call, New Event, New Task, or Send an Email buttons on the activity composer, you can add them. Just add the appropriate buttons to the Salesforce Mobile and Lightning Experience Actions section of page layouts.

Make sure the actions you want to add are included in the Global Publisher layout.

- 1. View the page layout for the object you want to update.
- 2. Make sure buttons for **New Task**, **New Event**, **Log a Call**, and **Send an Email** (not Send Email) are added to the Salesforce Mobile and Lightning Experience Actions section of the page layout.

Make sure your users have permission to create new tasks and events, log calls, and send email.



Note: The **Send an Email** mobile action is not supported on cases.

SEE ALSO:

Actions in Lightning Experience
How Actions Are Ordered in Lightning Experience
Page Layouts
Permission Sets

USER PERMISSIONS

To add buttons to page layouts:

 Customize Application and Modify All Data

EDITIONS

Available in Lightning Experience in: **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions Sales Productivity Notes

Notes

Stay organized and on top of all your deals by adding notes to accounts, contacts, leads, opportunities, and more. With Notes, Salesforce's enhanced note-taking tool, you can use rich text, lists, and images in your notes; relate notes to multiple records; and create notes in Lightning Experience.

Guidelines for Working with Notes

Review guidelines for creating and managing notes, including where to manage your notes, deleting notes, and note ownership.

Share Notes

Share notes and increase collaboration among colleagues.

Protect Sensitive Data with Private Notes

You rely on notes to streamline your workflow and increase productivity. With private notes, you can record sensitive information while keeping the note in context. You can also selectively share private notes.

Revert to a Previous Version of a Note

With Notes, the enhanced note-taking tool for Salesforce, you can see and restore old versions of notes.

Considerations for Setting Up Notes

Before setting up Notes, review the requirement to add the Notes related list to page layouts, Notes' limitations, and more.

Set Up Notes

Enable Notes, add the Notes related list to page layouts, and let users create notes with actions and in the Salesforce app.

Guidelines for Working with Notes

Review guidelines for creating and managing notes, including where to manage your notes, deleting notes, and note ownership.

- To create a note associated with a record, you need read access to the record.
- You can relate notes to custom objects, but not custom settings, when using Salesforce.
 To relate a note to custom settings, use the ContentDocumentLink API.
- To edit an existing note associated with a record, you need edit access to the note.
- To delete a note, you must be the owner of the note.
- To create notes in Lightning Experience, you must use Notes. Your Salesforce administrator must enable Notes.
- You can't share notes in the Salesforce app.
- When sharing a note in Lightning Experience, you can only give others viewer access, because Notes does not support simultaneous editing. If multiple people edit a note at the same time, they overwrite each other's content.

Guidelines for Notes

Watch a video: • How to Use Notes (English only)

- To create and manage notes on records, use the Notes related list, which your Salesforce admin must add to page layouts.
- If Notes is disabled, you can't access notes that were created with it.

EDITIONS

Available in: The Salesforce app, Salesforce Classic, and Lightning Experience

Available in: Essentials, Group, Professional, Enterprise, Performance, and Unlimited Editions

EDITIONS

Available in: The Salesforce app, Salesforce Classic, and Lightning Experience

Available in: Essentials, Group, Professional, Enterprise, Performance, and Unlimited Editions

- Only notes taken with Notes appear on the Notes tab.
- To create standalone notes or manage all your notes, use the Notes tab (available in Lightning Experience and the Salesforce app).
- Read old notes that were taken with the old note-taking tool from the Notes & Attachments related list on records. These notes don't appear in the Notes tab.
- After enabling Notes, the old note-taking tool remains available for creating and managing notes in Salesforce Classic and the Salesforce app. In Lightning Experience, the old note-taking tool is only used to read and manage notes that were created with it.
- When you create a note in Salesforce Classic, a note titled "Untitled Note" is created immediately. You are automatically taken to the notes editor page.
- When you create a note in Lightning Experience, the note isn't saved until you enter a title or content. Once the note is saved, further changes are saved automatically
- In the Salesforce app, create a task from a note by swiping a line on the note. Alternatively, tap \checkmark in the toolbar to add or update the status of an action item. If your profile is assigned two or more task record types, you're asked to choose a record type each time you create a task from a note. If your profile is assigned less than two Task record types, the task is immediately created.

Guidelines for When a New Version of a Note Is Created

In Lightning Experience, you can restore previous versions of a note. A new version of a note is created when at least one of the following is true.

- The user updating the note is different from the user that created the existing version.
- The existing version is more than 15 minutes old.
- The size of the note body increases by more than 200 bytes.
- The size of the note body decreases by more than 20%.

Guidelines for the Old Note-Taking Tool

- All notes added to contacts and opportunities roll up under the associated account as well.
- Notes are automatically related to the parent account.
- To create and manage notes on records, use the Notes & Attachments related list. You can't create notes with the old note-taking tool in Lightning Experience.
- To restore deleted notes, use the Recycle Bin.
- If a note is marked private, it's only accessible to the person who created or attached it.
- If you publish notes to external contacts via Salesforce to Salesforce, all public notes are automatically shared with a connection when you share the parent object. If Share With Connections on the attachment is selected, the attachment is automatically shared.
- To stop sharing a note or attachment, select Private.

Sales Productivity Share Notes

Share Notes

Share notes and increase collaboration among colleagues.

Share Notes in Lightning Experience

Increase collaboration by sharing your notes with people and groups.

Share Notes in Salesforce Classic

Increase collaboration by sharing your notes with people and groups.

EDITIONS

Available in: The Salesforce app, Salesforce Classic, and Lightning Experience

Available in: Essentials, Group, Professional, Enterprise, Performance, and Unlimited Editions

Share Notes in Lightning Experience

Increase collaboration by sharing your notes with people and groups.



Note: You can't share a note from the Notes & Attachments related list in Lightning Experience.

You can't share notes in the Salesforce app.

When sharing a note in Lightning Experience, you can provide Viewer access only. There is no Collaborator access.

Notes doesn't support simultaneous editing, and this restriction prevents multiple people from editing a note at the same time. If multiple people change a note at the same time, they overwrite each other's changes.

- 1. Open a note in the Notes related list.
- 2. Click Share.
- 3. Select who you'd like to share with.
- **4.** Enter a short message to the recipients.
- 5. To prevent the recipients from sharing or unsharing the note, open the Who Can Access section and click **Prevent others from sharing and unsharing**.
- **6.** Click **Share**.

The people you shared with receive an email with your message and a link to the shared note.

Share Notes in Salesforce Classic

Increase collaboration by sharing your notes with people and groups.



Note: Notes doesn't support simultaneous editing, and this restriction prevents multiple people from editing a note at the same time. If multiple people changed a note at the same time, they overwrite each other's changes.

- 1. Open a note.
- 2. Click Note Sharing Settings and choose Share with people or Share with groups.
- **3.** Select who you'd like to share with and their level of access.
- **4.** Enter a short message to the recipients.

EDITIONS

Available in: Lightning Experience

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

EDITIONS

Available in: Salesforce Classic

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

- 5. To prevent the recipients from sharing or unsharing the note, click **Prevent others from sharing and unsharing**.
- 6. Click Share.

The people you shared with receive an email with your message and a link to the shared note.

Protect Sensitive Data with Private Notes

You rely on notes to streamline your workflow and increase productivity. With private notes, you can record sensitive information while keeping the note in context. You can also selectively share private notes.

As you develop business relationships with your customers, you can become privy to confidential information. You could learn about an upcoming product launch, or the timing of a new initiative. You want to record this information, but don't want everyone to be able to see it. That's when private notes come in handy.

You have these sharing options for private notes:

Visible to Records

Anyone with read access to the related record can see the note. Create and share the note without choosing any options.

Privately Shared

The note is visible only to the rep and people the rep has explicitly shared it with.



Note: Notes in the Notes & Attachments related list can't be made privately shared.

In Lightning Experience, open a note in the Notes related list and click **Share**. To maintain privacy, open the Who Can Access section and click **Prevent others from sharing and unsharing**.

In Salesforce Classic, open a note in the Notes related list, click **Note Sharing Settings**, then **Sharing Settings**. Select **Prevent others from sharing and unsharing** under the Who Can Access section.

Private Only

Only the owner of the note can see it. In Salesforce Classic, notes marked as private are visible to the owner and admins.

- Lightning Experience
 - Create a note in the Notes related list and don't relate it to anything. By default, the note is private.
 - If you relate a note in the Notes related list to a record, click Share to Records and select Prevent note from being viewed by other users with access to this record.
 - Open a note in the Notes & Attachments related list, edit it, select **Private**, and save your change.
- Salesforce Classic
 - Open a note in the Notes related list, click Note Sharing Settings, then Sharing Settings. Click Make Private and Make Private again.
 - Open a note in the Notes & Attachments related list, select Private, and save your change.

EDITIONS

Available in: the Salesforce app, Lightning Experience, and Salesforce Classic

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Revert to a Previous Version of a Note

With Notes, the enhanced note-taking tool for Salesforce, you can see and restore old versions of notes.



Note: These steps work in Lightning Experience. If you see the App Launcher icon (;;;) on the left side of the navigation bar at the top of your screen, you're in Lightning Experience. If not, you're in Salesforce Classic.

- 1. From the Notes home page, click the note title.
- 2. In the note window, click version History.
- **3.** From the list, select the version of the note you'd like to view.
- **4.** To restore the selected version of the note, click **Restore**.

EDITIONS

Available in: Lightning Experience

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

Considerations for Setting Up Notes

Before setting up Notes, review the requirement to add the Notes related list to page layouts, Notes' limitations, and more.

- To create notes in Lightning Experience, you must use Notes.
- To set up Notes, add the Notes related list to all relevant page layouts and enable Notes.
- You can have both note-taking tools enabled at the same time in Salesforce. However, notes can only be read and edited using the tool they were created with.
- If you use Notes, we suppress legacy note quick actions:
 - In the page layout editor
 - In the page layout, if a legacy note quick action was added before you enabled Notes

EDITIONS

Available in: The Salesforce app, Salesforce Classic, and Lightning Experience

Available in: Essentials, Group, Professional, Enterprise, Performance, and Unlimited Editions

Notes Limitations

- Notes added to contacts and opportunities don't roll up under the associated account.
- Notes aren't automatically added to the parent account.
- Notes aren't supported for Salesforce Communities.
- The Notes related list isn't supported in Visualforce pages.

Where are Notes Features Available?

- Automatic saving is only available in Lightning Experience.
- Reverting to earlier versions is only available in Lightning Experience.
- Adding images to notes is only available in Lightning Experience and Salesforce for iOS.
- Creating tasks from notes is only available in the Salesforce app.
- Sharing notes is only available in Lightning Experience and Salesforce Classic.

Sales Productivity Set Up Notes

Seeing all notes that you own from the Notes tab is only available in Lightning Experience and the Salesforce app.

SEE ALSO:

Set Up Notes

Notes

Set Up Notes

Enable Notes, add the Notes related list to page layouts, and let users create notes with actions and in the Salesforce app.

1. Enable Notes

From Setup, select **Enable Notes** on the Notes Settings page.

2. Add the Notes Related List to Page Layouts

Using the page layout editor, add the Notes related list to page layouts for all objects where you want users to take notes.

3. Let Users Create Notes from the Chatter Publisher, Global Actions Menu, and the Salesforce App Action Bar

Add the **New Note** action to publisher layouts.

4. Let Users Take Notes in the Salesforce App

Make sure that your reps can create tasks from notes in the Salesforce app and that Notes appears in the app navigation menu.

5. Turn Off Feed Tracking for Notes

Want to hide feed updates that tell your users whenever someone creates or changes a note? Now, note feed tracking is controlled by enabling and disabling feed tracking for all related objects. To turn off feed tracking for notes, disable feed tracking for all related objects.

SEE ALSO:

Considerations for Setting Up Notes

Edit Page Layouts for Standard Objects

Edit Page Layouts for Custom and External Objects

Notes

EDITIONS

Available in: The Salesforce app, Salesforce Classic, and Lightning Experience

Available in: Essentials, Group, Professional, Enterprise, Performance, and Unlimited Editions Sales Productivity Set Up Notes

Enable Notes

From Setup, select **Enable Notes** on the Notes Settings page.

- 1. From Setup, enter Notes Settings in the Quick Find box, then select Notes Settings.
- **2.** Make sure **Enable Notes** is selected.
- 3. Click Save.

EDITIONS

Available in: The Salesforce app, Salesforce Classic, and Lightning Experience

Available in: Essentials, Group, Professional, Enterprise, Performance, and Unlimited Editions

USER PERMISSIONS

To enable Notes:

Customize Application
 View Setup and
 Configuration

Add the Notes Related List to Page Layouts

Using the page layout editor, add the Notes related list to page layouts for all objects where you want users to take notes.

- 1. Access the page layout editor for each object.
- 2. Make sure that the Notes related list was added to the page layout.
- **3.** Save the page layout.

Complete these steps for each object where you want users to take notes.

SEE ALSO:

Customize Related Lists

EDITIONS

Available in: The Salesforce app, Salesforce Classic, and Lightning Experience

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To edit page layouts:

Customize Application
 View Setup and
 Configuration

Sales Productivity Set Up Notes

Let Users Create Notes from the Chatter Publisher, Global Actions Menu, and the Salesforce App Action Bar

Add the **New Note** action to publisher layouts.

- From Setup, enter Publisher Layouts in the Quick Find box, then select Publisher Layouts.
- 2. Edit a publisher layout.
- **3.** Make sure the **New Note** action was added to the Quick Actions in the Salesforce Classic Publisher and the Mobile & Lightning Actions.
- **4.** Save the publisher layout

Complete these steps for all your publisher layouts. If you've overridden the global publisher layout on any of your object page layouts, add the **New Note** action to your custom layouts, too.

SEE ALSO:

Add Actions to Global Publisher Layouts

EDITIONS

Available in: The Salesforce app, Salesforce Classic, and Lightning Experience

Available in: Essentials, Group, Professional, Enterprise, Performance, and Unlimited Editions

USER PERMISSIONS

To edit publisher layouts:

Customize Application
 View Setup and
 Configuration

Let Users Take Notes in the Salesforce App

Make sure that your reps can create tasks from notes in the Salesforce app and that Notes appears in the app navigation menu.

- From Setup, enter Activity Settings in the Quick Find box, then select Activity Settings.
- 2. Select Allow Creation of Tasks from Notes.
- **3.** Save the page.
- **4.** From Setup, enter *Navigation* in the Quick Find box, then select **Salesforce Navigation**.
- 5. Move **Notes** from the Available list to the Selected list. We recommend putting it above **Smart Search Items**.
- 6. Save the page.

In the Salesforce app, your users can create a task from a note by swiping a line on the note. Alternatively, they can tap in the toolbar to add or update the status of an action item. If a user's profile is assigned more than one Task record type, the user is prompted to choose a record type for the task.

SEE ALSO:

Customize the Salesforce App Navigation Menu

EDITIONS

Available in: The Salesforce app, Salesforce Classic, and Lightning Experience

Available in: Essentials, Group, Professional, Enterprise, Performance, and Unlimited Editions

USER PERMISSIONS

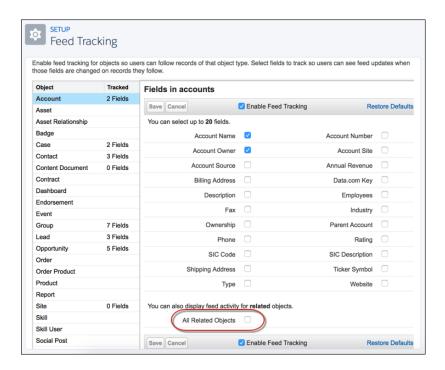
To update activity settings and the app navigation menu:

Customize Application
 View Setup and
 Configuration

Turn Off Feed Tracking for Notes

Want to hide feed updates that tell your users whenever someone creates or changes a note? Now, note feed tracking is controlled by enabling and disabling feed tracking for all related objects. To turn off feed tracking for notes, disable feed tracking for all related objects.

- 1. From Setup, enter Feed Tracking in the Quick Find box, then select Feed Tracking.
- 2. Select the object you want to turn off feed tracking for.
- 3. Deselect All Related Objects.



EDITIONS

Available in: The Salesforce app, Salesforce Classic, and Lightning Experience

Available in: Essentials, Group, Professional, Enterprise, Performance, and Unlimited Editions

USER PERMISSIONS

To turn off feed tracking for all related objects:

 Customize Application AND Modify All Data

Repeat these steps for each object you want to turn off feed tracking for.

Social Accounts, Contacts, and Leads

Increase your users' access to social intelligence and serve customers and prospects better with easy access to social network profiles associated with Salesforce accounts, contacts, and leads. In Salesforce Classic, you can access Twitter and Youtube. In Lightning Experience, you can only access Twitter.

Guidelines for Using Social Accounts, Contacts, and Leads

Review guidelines for using Social Accounts, Contacts, and Leads, including privacy and security details and which social networks are available by record and user experience.

Link Twitter Profiles to Accounts, Contacts, and Leads

View an account, contact, or lead, and sign in to Twitter. You'll automatically see the available Twitter information for the record.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: All Editions

Hide Social Network Profiles on Accounts, Contacts, and Leads

If Social Accounts, Contacts, and Leads is enabled for your organization, you can choose which social networks you want to see on records. This just hides social network information for yourself. Other users with access to records may still see the social network profiles for those records.

Select and Change Profile Images for Accounts, Contacts, and Leads

When someone's linked a social network profile to a Salesforce record, the profile's image is often displayed on the record. If Account Logos is enabled, you can replace profile images with images that you've manually added.

Set Up Social Accounts, Contacts, and Leads

From the Social Accounts, Contacts, and Leads Settings page in Setup, you can enable or disable Social Accounts, Contacts, and Leads. You can also choose the social networks that are available to your users. Social Accounts, Contacts, and Leads is typically enabled by default.

Guidelines for Using Social Accounts, Contacts, and Leads

Review guidelines for using Social Accounts, Contacts, and Leads, including privacy and security details and which social networks are available by record and user experience.

1

Important: Social Accounts, Contacts, and Leads uses public APIs to display social network information in Salesforce. Social networks can change or terminate API access at any time, so we can't guarantee availability of this feature or access to data that's currently provided. As of the Winter '16 release, LinkedIn is no longer available through this feature. As of May, 2018, Facebook and Klout are no longer available through this feature.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: All Editions

Security and Privacy

- Which social network resources and information you can see about a person or company depends on how you're connected to that person or company on the social networks as well as that person or company's privacy settings. If you aren't signed in to the social network through Salesforce, you see only information the person or company has made available to the public.
- Salesforce uses the trusted OAuth protocol when you sign in to your social network accounts. Your login credentials aren't exposed to Salesforce, and we never store your passwords.
- Salesforce doesn't import or store social information. Each time you select a social profile or a YouTube video, Salesforce retrieves the information that you want to see directly from the social network. You'll always see current social information for your accounts, contacts, and leads.
- Associating a Salesforce record with a social network account doesn't cause any activity on the social network. For example, when you associate a contact with a Twitter account, you don't become a Follower of that account on Twitter.
- Salesforce never posts anything about your or your activities to your social network accounts.
- Your accounts, contacts, and leads aren't notified when you use Salesforce to view their social network profiles. And your interaction with social networks through Salesforce is read-only as long as you're using the Social Viewer.
 - Ø

Note: If you leave the Social Viewer, for example by clicking a link that opens a new Web browser tab, you're leaving Salesforce and interacting directly with the social network. Actions you perform outside of the Salesforce Social Accounts, Contacts, and Leads viewer may be recorded on the social network.

Table 10: Social Network Availability By Record and User Experience

| Social Network | Supported Records in Salesforce Classic | Supported Records in Lightning Experience and the Salesforce App |
|----------------|---|--|
| Twitter | Accounts Contacts Leads | Accounts Contacts Leads |
| YouTube | Accounts Contacts Leads | |

SEE ALSO:

Link Twitter Profiles to Accounts, Contacts, and Leads
Hide Social Network Profiles on Accounts, Contacts, and Leads
Select and Change Profile Images for Accounts, Contacts, and Leads
Social Accounts, Contacts, and Leads

Link Twitter Profiles to Accounts, Contacts, and Leads

View an account, contact, or lead, and sign in to Twitter. You'll automatically see the available Twitter information for the record.

- 1. View an account, contact, or lead record.
- 2. Sign in to Twitter. In Salesforce Classic, find Twitter under the record's name. In Lightning Experience, find it on the record's News tab. If you don't see a link or icon, ask your administrator to enable Social Accounts, Contacts, and Leads and all avabilable social networks. You may also need to unhide social networks for yourself.

 Salesforce automatically searches for profiles that match the record's name.
- **3.** Select a profile to link it with the record, or search again using different search keywords.

SEE ALSO:

Hide Social Network Profiles on Accounts, Contacts, and Leads Guidelines for Using Social Accounts, Contacts, and Leads

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: All Editions

USER PERMISSIONS

To view social network profiles for an account, contact, or lead:

Read and Edit on the accounts, contacts, and leads

Hide Social Network Profiles on Accounts, Contacts, and Leads

If Social Accounts, Contacts, and Leads is enabled for your organization, you can choose which social networks you want to see on records. This just hides social network information for yourself. Other users with access to records may still see the social network profiles for those records.

In Salesforce Classic, you can access Twitter and Youtube. In Lightning Experience, you can only access Twitter.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: All Editions

- 1. From your personal settings, enter *Social* in the Quick Find box, then select **My Social Accounts and Contacts Settings**, **My Social Accounts and Contacts**, or **Settings**—whichever one appears.
- 2. Deselect the social networks you want to hide. If you deselect **Use Social Accounts and Contacts**, it's the same as deselecting all social networks.
- 3. Click Save.

SEE ALSO:

Link Twitter Profiles to Accounts, Contacts, and Leads Link Twitter Profiles to Accounts, Contacts, and Leads Social Accounts, Contacts, and Leads

Select and Change Profile Images for Accounts, Contacts, and Leads

When someone's linked a social network profile to a Salesforce record, the profile's image is often displayed on the record. If Account Logos is enabled, you can replace profile images with images that you've manually added.

- 1. View an account, contact, or lead record.
- Click a social network. In Salesforce Classic, click the icons under the record's name. In Lightning Experience, use the links on the records' News tab.
- 3. In the Social Viewer, select the tab for the social network that has the image you want to use.
- 4. Click Show Photo in Salesforce.

SEE ALSO:

Hide Social Network Profiles on Accounts, Contacts, and Leads Link Twitter Profiles to Accounts, Contacts, and Leads Guidelines for Using Social Accounts, Contacts, and Leads Social Accounts, Contacts, and Leads

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: All Editions

USER PERMISSIONS

To update social network profile images on accounts, contacts, and leads:

 Edit on accounts, contacts, and leads

Set Up Social Accounts, Contacts, and Leads

From the Social Accounts, Contacts, and Leads Settings page in Setup, you can enable or disable Social Accounts, Contacts, and Leads. You can also choose the social networks that are available to your users. Social Accounts, Contacts, and Leads is typically enabled by default.

- From Setup, enter Social Accounts in the Quick Find box, then select Social Accounts and Contacts Settings.
- 2. Select Enable Social Accounts and Contacts.
- **3.** Select the social networks that users in your organization can access. By default, all social networks are selected.
- 4. Click Save.
- **5.** To make Twitter accessible in the Salesforce app, add the Twitter card to the Mobile Cards section of the accounts, contacts, and leads page layouts.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: All Editions

USER PERMISSIONS

To enable Social Accounts, Contacts, and Leads:

Customize Application

Sales Productivity Salesforce to Salesforce

Let users know that they can configure Social Accounts, Contacts, and Leads for their individual use.

SEE ALSO:

Link Twitter Profiles to Accounts, Contacts, and Leads Social Accounts, Contacts, and Leads

Salesforce to Salesforce

Salesforce to Salesforce makes it easy for businesses using Salesforce to share records and get updated data on shared records. For example, you can share lead and opportunity data with partners. Salesforce to Salesforce lets your business partners easily integrate your data with their Salesforce records. You can see all of your sharing activity, manage your entire pipeline, share data across multi-tiered partnerships, and integrate your business processes with updates received from your partners using workflow and assignment rules.

Set Up Salesforce to Salesforce

To set up Salesforce to Salesforce, you enable and configure it, connect to other Salesforce organizations, and start sharing data.

Share Records Using Salesforce to Salesforce

Once you've created a connection to another Salesforce organization, you can share records and updated data with them. You control the type of records you share with your connected organizations by selecting which objects and fields to publish. Your connected organizations don't have direct access to records that you're sharing. They have a record in their organization that is connected to your record through Salesforce to Salesforce. Any updates to the shared information on either record is reflected on the other record.

Report on Salesforce to Salesforce Activity

To track Salesforce to Salesforce activity and updates, create custom reports.

Guidelines for Using Salesforce to Salesforce

Review some guidelines for using Salesforce to Salesforce.

Statuses for Records Shared with Salesforce to Salesforce

Salesforce to Salesforce lets you share records with connected organizations. When viewing a shared record, the header shows the record's sharing status. The record may also contain the External Sharing related list, which shows sharing details and status.

Best Practices for Mapping Fields in Salesforce to Salesforce

When you subscribe to a field in Salesforce to Salesforce, you map it to a field in your organization. This mapping lets updates to that field sync for all shared records. Before you map fields, look at these important best practices.

SEE ALSO:

Organization Sync

EDITIONS

Available in: Salesforce Classic

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

Set Up Salesforce to Salesforce

To set up Salesforce to Salesforce, you enable and configure it, connect to other Salesforce organizations, and start sharing data.

1. Enable Salesforce to Salesforce

From Salesforce to Salesforce Settings in Setup, you can easily enable Salesforce to Salesforce. After enabling Salesforce to Salesforce, you can't disable it. However, you can control which data you share and with whom you share it.

2. Configure Salesforce to Salesforce

After enabling Salesforce to Salesforce, you create and assign a permission set to control which users can manage connections and sharing. You also add the External Sharing related list to page layouts and create communication templates for managing communications with connected organizations.

EDITIONS

Available in: Salesforce Classic

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

3. Connect with Your Business Partners using Salesforce to Salesforce

Using Connection Finder, you can find out which business partners use Salesforce. Then, you can invite them to connect with you to share data using Salesforce to Salesforce. From the Connections tab, you can manage your Salesforce to Salesforce connections and connection templates.

4. Publish Objects with Salesforce to Salesforce

To share records with another Salesforce organization using Salesforce to Salesforce, you must first publish the objects that you want to share.

5. Publish Fields in Salesforce to Salesforce

Once you publish an object, you can select which individual fields on that object are published. For standard objects that are published, a default set of fields is automatically published.

6. Subscribe to Objects with Salesforce to Salesforce

When you are connected to a business partner using Salesforce to Salesforce, you can subscribe to objects that your business partner has published. When you subscribe to an object, you map it to an object in your organization. Standard objects must map to standard objects in your organization, but you can map custom objects to any custom object. For example, if your business partner has published a custom object named Prospects, you can map that to a custom object named Client.

7. Subscribe to Fields in Salesforce to Salesforce

8. Automate Updates with Workflow Rules in Salesforce to Salesforce

You can use workflow rules to automate updates to records and connections in Salesforce to Salesforce. You can use workflows for many processes, including updating values on picklists when a connection has edited the field. If your organization is set up to automatically accept records, workflow rules are triggered by any field you subscribed to.

SEE ALSO:

Salesforce to Salesforce Organization Sync

Enable Salesforce to Salesforce

From Salesforce to Salesforce Settings in Setup, you can easily enable Salesforce to Salesforce. After enabling Salesforce to Salesforce, you can't disable it. However, you can control which data you share and with whom you share it.

- **1.** From Setup, enter *Salesforce to Salesforce Settings* in the Quick Find box, then select **Salesforce to Salesforce Settings**.
- 2. Click Edit.
- 3. Select Enable.
- 4. Click Save.

You're responsible for ensuring that appropriate contractual or other legal arrangements are in place between you and your connected organizations. By enabling Salesforce to Salesforce, you agree to allow Salesforce to process updates to information in your organization that is shared with other organizations.

When you enable Salesforce to Salesforce, a new user named "Connection User" is created. This user does not count towards the number of used licenses for your organization, and is not included in any user management view. When your business partner updates a shared record, the Last Modified By field on the record in your organization displays Connection User, allowing

you to easily track all changes made by your business partners. The Connection User is automatically assigned to the Partner Network profile. The Partner Network profile cannot be modified and is not included in any profile management view.

SEE ALSO:

Salesforce to Salesforce
Guidelines for Using Salesforce to Salesforce
Find Out if Your Businesses Partners Use Salesforce

Configure Salesforce to Salesforce

After enabling Salesforce to Salesforce, you create and assign a permission set to control which users can manage connections and sharing. You also add the External Sharing related list to page layouts and create communication templates for managing communications with connected organizations.

- 1. Create a permission set with the "Manage Connections" permission enabled and the Connection tab set to Visible. Assign the permission set to users who will be working with Salesforce to Salesforce connections. Giving the "Manage Queues" user permission to all users with the "Manage Connections" user permission. This lets users create and manage queues for connections without needing assistance from an administrator.
- **2.** Add the External Sharing related list to page layouts for the appropriate profiles. This related list can be made available to all users, not just users with the "Manage Connections" permission.
- **3.** Create custom list views on the External Sharing related list and give access to the appropriate users, so that they can view and accept shared records.
- **4.** Add the Received Connection Name and Sent Connection Name columns to the related lists on the page layouts of the desired objects.
- **5.** Configure Salesforce to Salesforce to use communication templates for interacting with your connected organizations. In addition, you can configure the email address and name used on the templates.

EDITIONS

Available in: Salesforce Classic

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To enable Salesforce to Salesforce:

Modify All Data

EDITIONS

Available in: Salesforce Classic

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To configure Salesforce to Salesforce:

Modify All Data

- **a.** From Setup, enter *Salesforce to Salesforce Settings* in the Quick Find box, then select **Salesforce to Salesforce Settings**.
- **b.** Click **Edit** and modify the following settings:

| Setting | Description |
|---------------------------------------|---|
| From Email Address | The email address from which all Salesforce to Salesforce communication templates are sent, for example, "partner@acme.com." Salesforce sends the emails automatically, but they appear to your contacts as if they were sent from this email address. If a contact responds to a communication template, the response is sent to this address. |
| From Email Name | The name that will be associated with the "From" Email Address, for example, "Acme Channel Manager". |
| Invitation Template | Used to send invitations. |
| Deactivation Template | Used to notify a business partner that you have deactivated the connection. |
| Accept Invitation Template | Used to notify a business partner that you have accepted an invitation. |
| Reject Invitation Template | Used to notify a business partner that you have not accepted an invitation. |
| Update Connection Profile Template | Used to notify business partners of changes to an active connection profile. |

c. Click Save.

SEE ALSO:

Set Up Salesforce to Salesforce

Connect with Your Business Partners using Salesforce to Salesforce

Using Connection Finder, you can find out which business partners use Salesforce. Then, you can invite them to connect with you to share data using Salesforce to Salesforce. From the Connections tab, you can manage your Salesforce to Salesforce connections and connection templates.

Enable Connection Finder

Connection Finder lets you connect with businesses that use Salesforce so you can share data with them. From Salesforce to Salesforce Connection Finder in Setup, you can enable it.

Find Out if Your Businesses Partners Use Salesforce

With Salesforce to Salesforce, businesses that use Salesforce can share records and get updated data. After you enable and configure Salesforce to Salesforce, you can email your business

partners a survey that asks if they use Salesforce. Survey responses are recorded in contact and account records. Then, using Salesforce to Salesforce, you can easily connect with organizations that use Salesforce and begin sharing data.

Invite Business Partners to Connect using Salesforce to Salesforce

Before you can start sharing data with your business partners, you need to set up a connection to them using Salesforce to Salesforce. To create that connection, you need to invite your business partner.



Available in: Salesforce Classic

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Accept an Invitation for Salesforce to Salesforce

Create and Apply Connection Templates

Connection templates let you define objects and fields that can be published to connected organizations. To make publishing easier, assign connection templates to your connections by going to the Connections tab and then the Templates sub-tab. When a connection template is applied to a connection, the object and field rules are applied to that connection.

Manage Salesforce to Salesforce Connections

From the Connections tab, you can manage your Salesforce to Salesforce connections and connection templates. Connections include everyone that you have invited, whether they have accepted, declined, or have not yet responded, as well as all the invitations you have received. Recent connections are automatically displayed on the Connections sub-tab.

SEE ALSO:

Set Up Salesforce to Salesforce

Enable Connection Finder

Connection Finder lets you connect with businesses that use Salesforce so you can share data with them. From Salesforce to Salesforce Connection Finder in Setup, you can enable it.

- 1. From Setup, enter *Connection Finder* in the Quick Find box, then select **Salesforce** to **Salesforce Connection Finder**.
- 2. Click Edit
- 3. Select Enabled.
- **4.** Click **Save**. The connection finder settings are now available to configure. Additionally, the default email template and required related fields are created and available for use.
 - Note: Disabling Connection Finder inactivates outstanding surveys and removes the Connection Finder button.
- **5.** From Setup, enter *Connection Finder* in the Quick Find box, then select **Salesforce to Salesforce Connection Finder**.
- 6. Click Edit.
- 7. Select an email template. The default connection finder template is automatically selected. You can also create custom email templates for your survey. Custom email templates must contain the survey URL. { !Contact.PartnerSurveyURL} is available as a contact merge field when creating templates.
- 8. Optionally, select a logo using the lookup. You must first upload your logo to the Documents tab and mark it as Externally Available Image. Salesforce recommends adding a branded logo, as it appears at the top of the survey page. If no logo is selected, the logo portion of the survey page remains blank.
- **9.** Add the Connection Finder button to the contacts list view by customizing the search layout. Add the button to the contact detail page by customizing the contacts page layout.
- 10. Add the Uses Salesforce field to the contacts page layout.
- 11. Add the Salesforce Customer field to the account page layout.

SEE ALSO:

Connect with Your Business Partners using Salesforce to Salesforce

EDITIONS

Available in: Salesforce Classic

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To enable Connection Finder and edit settings:

Modify All Data

Find Out if Your Businesses Partners Use Salesforce

With Salesforce to Salesforce, businesses that use Salesforce can share records and get updated data. After you enable and configure Salesforce to Salesforce, you can email your business partners a survey that asks if they use Salesforce. Survey responses are recorded in contact and account records. Then, using Salesforce to Salesforce, you can easily connect with organizations that use Salesforce and begin sharing data.

- In the Contact list view, select the partners you want to survey and click Find Connections.
 (Find Connections doesn't appear if the contact record doesn't have a valid email address or isn't associated with an account.)
- 2. Type the email into the default template or choose a different email template. The default email template is selected by your administrator. You can select a different template or edit the body text, however, you must include the survey URL. You can't edit body text if you chose multiple recipients.
- 3. Send the email.

Recipients have 90 days to respond to the survey before the survey link becomes invalid. The response is recorded on the recipient's contact and account records. A closed activity is also added to the contact.

If the partner's organization uses Salesforce, the survey displays a section asking if the recipient has administrator privileges for Salesforce. If not, the recipient can optionally provide their administrator's contact information and a new contact record is created in Salesforce for that user (unless one already exists). If a partner provides details for their Salesforce administrator, Salesforce checks to

EDITIONS

Available in: Salesforce Classic

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To email partners asking if they use Salesforce:

Send Email (single recipient)

OR

Mass Email (multiple recipients)

see if there is already a contact in your Salesforce organization with that email address. If so, the Connection Finder field on the contact record is set to Yes, admin user. If the field is already set to No, it is not updated.



Note: A partner can only add an administrator if one does not already exist as a contact in your organization.



Tip:

- Create a custom list view or custom report so that you can track customer responses in one convenient location.
- Create translated versions of the default connection finder template to send to international partners. To do so, clone the
 default template, make the necessary language changes, and include the survey URL. You can then choose the appropriate
 template when sending out requests to your partners. The survey page is in English, but it includes a Language drop-down
 so that recipients can view the survey in their native language.
- When creating validation rules for the Connection Finder field, use the API value, not the label seen in the user interface. For example:

CONTAINS(TEXT(UseSalesforce), 'YesNotAdmin')

| Connection Finder drop-down value | API value |
|-----------------------------------|------------|
| No | No |
| No Response | NoResponse |
| Not Sure | NotSure |
| Yes, admin user | YesAdmin |
| | |

| Connection Finder drop-down value | API value |
|-----------------------------------|-------------|
| Yes, not admin user | YesNotAdmin |

SEE ALSO:

Report on Salesforce to Salesforce Activity

Connect with Your Business Partners using Salesforce to Salesforce

Invite Business Partners to Connect using Salesforce to Salesforce

Before you can start sharing data with your business partners, you need to set up a connection to them using Salesforce to Salesforce. To create that connection, you need to invite your business partner.

- 1. Create an account and an associated contact for your business partner (if they don't already exist).
- 2. Click the Connections tab.
- 3. Click New.
- **4.** Enter a contact name or use the lookup icon to select a contact.
 - (!) Important: Make sure that the email address is valid; otherwise, your invitation may be sent to the wrong person.
- **5.** Optionally, select a related account. The account associated with the connection can be changed after the invitation is sent.
- **6.** Choose a user to manage the connection.
- **7.** Optionally, choose a template to apply to the connection.
- 8. Click Save & Send Invite.

To invite multiple business partners to connect using Salesforce to Salesforce:

- 1. Click the Contacts tab.
- 2. Select a standard or custom list view, then click Go!.
- **3.** In the list view, select the checkboxes next to the contacts you want to invite.
 - [] Important: Make sure that the email addresses are valid; otherwise, your invitations may be sent to the wrong people.
- 4. Click Invite to Connect.
- 5. Choose a user to manage the connection.
- **6.** Optionally, choose a template to apply to the connection.
- 7. Click Save & Send Invite.

EDITIONS

Available in: Salesforce Classic

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To invite to a business partner to connect using Salesforce to Salesforce:

The people you invite will receive an email invitation to connect with you using Salesforce to Salesforce. They can choose to accept or decline your invitation. You can check whether they have accepted or declined the invitation by reviewing your connections on the Connections tab. From the Connections tab, you can also resend or cancel the invitation.

SEE ALSO:

Find Out if Your Businesses Partners Use Salesforce
Create and Apply Connection Templates
Connect with Your Business Partners using Salesforce to Salesforce

Accept an Invitation for Salesforce to Salesforce

If a business partner sent you an invitation to connect using Salesforce to Salesforce, you can accept or reject that invitation by following these steps:

- 1. Click the link in the invitation email to go to the Salesforce login page.
- **2.** Log in as the System Administrator or as a user with the "Manage Connections" permission.
- **3.** Review the details of the invitation.
- 4. Click Accept or Decline.

If you aren't sure whether you want to accept or decline, click **Decide Later**. The invitation displays on the Connections tab with a connection status of Invitation Received. You can easily accept or decline it at a later date.

When you accept or reject an invitation, the company that invited you receives an email notifying them of your decision. The content of that email can be configured by changing the appropriate email template.

SEE ALSO:

Salesforce to Salesforce
Guidelines for Using Salesforce to Salesforce
Connect with Your Business Partners using Salesforce to Salesforce

EDITIONS

Available in: Salesforce Classic

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To accept or reject an invitation to connect using Salesforce to Salesforce:

Create and Apply Connection Templates

Connection templates let you define objects and fields that can be published to connected organizations. To make publishing easier, assign connection templates to your connections by going to the Connections tab and then the Templates sub-tab. When a connection template is applied to a connection, the object and field rules are applied to that connection.

There are rules for connection templates.

- Objects and fields that are not already published but are published in the connection template are published.
- Objects and fields that have the same publish or unpublish status as the template are unchanged.
- Objects and fields that are already published but are not published in the connection template are unpublished.

Creating and Editing Connection Templates

Connection templates allow you to define object and field publishing rules that can be applied to one or more standard Salesforce to Salesforce connections.

To create a connection template:

- 1. Select the Connections tab.
- 2. Select the Templates subtab.
- 3. Click New.
- **4.** Type a name and an optional description.
- **5.** Select the **Active** checkbox if you want to be able to assign the template to standard connections.
- **6.** Click **Save** to save the template, or click **Save & Add Objects** to add objects to the template.
- 7. If you clicked Save & Add Objects, select the checkboxes next to the objects you want to add, then click Save.
 - Note: If you clicked Save, you can click Add/Remove Objects on the template detail page to add objects.
- 8. Click Edit next to an object you added to the Published Objects related list.
- 9. Select the fields you want to publish for the object, then click **Save**.
- **10.** Repeat steps 8 and 9 for each object you added to the Published Objects related list.

To deactivate a connection template:

- 1. On the Templates subtab, click **Edit** next to the template you want to deactivate. Alternatively, click **Edit** on the template detail page.
- 2. Deselect the Active checkbox.
- 3. Click Save.
- Note: Only active connection templates can be assigned to connections. If you want to use a template that you had deactivated, you can do so by selecting the **Active** checkbox.

Assigning Connection Templates to Connections

You can assign connection templates to connections when inviting one or more new connections, or you can assign connection templates to existing connections.

To assign a connection template to an existing connection:

EDITIONS

Available in: Salesforce Classic

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To create, edit, and view connection templates:

- 1. Select the Connections tab.
- 2. Select the Connections subtab.
- 3. Click the name of the connection you want to assign the template to.
- 4. Click Edit
- 5. In the Template field, type the name of the template or click the lookup icon to search for a template.
- 6. Click Save.

SEE ALSO:

Connect with Your Business Partners using Salesforce to Salesforce

Manage Salesforce to Salesforce Connections

From the Connections tab, you can manage your Salesforce to Salesforce connections and connection templates. Connections include everyone that you have invited, whether they have accepted, declined, or have not yet responded, as well as all the invitations you have received. Recent connections are automatically displayed on the Connections sub-tab.

From the connection detail page, you can:

Accept an Invitation

If a business partner has sent you an invitation to connect using Salesforce to Salesforce, click **Accept** to accept the invitation. After you accept the invitation, you can subscribe to objects that the connection has published and begin sharing objects with the connection using the Published Objects and Subscribed Objects related lists on a connection detail page.

Cancel an Invitation

If an invitation you sent hasn't been accepted, you can cancel the invitation by clicking **Cancel Invitation**. If your partner hasn't received the invitation, click **Resend** to send it again.

Deactivate Connections

If you have created a connection with a business partner and you no longer wish to use the connection, click **Deactivate**. If a connection is deactivated, you can still view and update records that your connection shared with you, but updates you make won't be sent to your connection. If you sent records to your connection that they didn't accept, the records are removed from their organization, and vice versa.

Edit Connections

When displaying the connection, you can modify the connection by editing the connection details. To change the objects published to a connection, click **Publish/Unpublish**, or to use a connection template, click **Edit** and select an active template. To edit the published fields on an object, click **Edit** next to the object. To change the objects you're subscribed to, click **Subscribe/Unsubscribe**.

View Connection History

You can view a detailed history of the connection in the Connection History related list of the connection detail page. To export the connection history, select **Download connection history (csv)**. This lets you download a comma-separated values file that includes the following information:

- Connection status changes
- Changes to which account is associated with the connection
- Changes to which contact is associated with the connection
- Connection owner changes
- Changes to published fields

EDITIONS

Available in: Salesforce Classic

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To manage connections:

- Email communications sent to your business partners
- Errors related to validation rules and Apex triggers with validation rules resulting from:
 - Records manually accepted
 - Records automatically accepted
 - Records updated by Connection User



Note: System errors, for example, code errors, aren't logged in the Connection History.

SEE ALSO:

Connect with Your Business Partners using Salesforce to Salesforce

Publish Objects with Salesforce to Salesforce

To share records with another Salesforce organization using Salesforce to Salesforce, you must first publish the objects that you want to share.

- 1. Click the Connections tab.
- 2. Select a connection. You select published objects by connection.
- 3. In the Published Objects related list, click Publish/Unpublish.
- **4.** Select the objects to publish.

All custom objects in your organization appear in the list of objects, however, Salesforce to Salesforce only supports deployed custom objects. You can't publish objects that you don't have permission to edit. You can only publish certain objects.

- Account
- Attachment (unencrypted)
- Case
- Case Comment
- Contact
- Lead
- Opportunity
- Opportunity Product
- Product
- Task
- Custom Object

5. Click Save.

When you update the published objects for a connection, Salesforce sends an email notification to the connected organization. You can customize this email by editing the Update Connection communication template.

Your business partner is automatically unsubscribed to objects when you stop publishing an object and when you delete a custom object to which your business partner is subscribed.

If you publish the case comment object, all public case comments will be shared with your connections. To avoid sharing a comment on a specific case, select **Make Private**.

EDITIONS

Available in: Salesforce Classic

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To publish objects:

Only unencrypted files are supported.

SEE ALSO:

Publish Fields in Salesforce to Salesforce

Publish Fields in Salesforce to Salesforce

Once you publish an object, you can select which individual fields on that object are published. For standard objects that are published, a default set of fields is automatically published.

- 1. Click the Connections tab.
- 2. Select a connection. You select publication options by connection.
- 3. In the Published Objects related list, click Edit next to the published object.
- **4.** Select the fields you want to publish to your business partner. Deselect fields you no longer want to publish.

You cannot publish fields that you do not have permission to edit. Changes to fields may not show up in the subscribing connection for up to 15 minutes while Salesforce refreshes the cache. This cache enables us to support larger transaction volumes and reduce the number of API calls that count against your organization's limits. You cannot publish rich text area (RTA) fields. Geolocation fields and latitude and longitude on standard addresses aren't supported in Salesforce to Salesforce. By default, the following fields are published.

- Account: Account Name, and, if you are using person accounts, Last Name
- Attachment: Body, Content Type, File Name
- Case: Subject
- Case Comment: Body and Published
- Contact: Last Name
- Custom Object: Name
- Lead: Last Name and Company
- Opportunity: Name, Closed Date, and Stage
- Product: Product Name
- Task: Subject
- Opportunity Product: Quantity, Sales Price

Salesforce to Salesforce displays the API label for each field.

5. Click Save.

When you update the published fields for a connection, Salesforce sends an email notification to the connected organization. You can customize this email by editing the Update Connection communication template.

Your business partner is automatically unsubscribed to fields when you stop publishing a field, delete a custom field to which your business partner is subscribed, change the type of a field to which your business partner is subscribed, and change the size or precision of a long text area, text, percent, number, or currency field.

SEE ALSO:

Subscribe to Fields in Salesforce to Salesforce

EDITIONS

Available in: Salesforce Classic

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

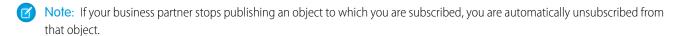
To publish fields:

Subscribe to Objects with Salesforce to Salesforce

When you are connected to a business partner using Salesforce to Salesforce, you can subscribe to objects that your business partner has published. When you subscribe to an object, you map it to an object in your organization. Standard objects must map to standard objects in your organization, but you can map custom objects to any custom object. For example, if your business partner has published a custom object named Prospects, you can map that to a custom object named Client.

- 1. Click the **Connections** tab.
- 2. Select the connection to modify.
- **3.** In the Subscribed Objects related list, click **Subscribe/Unsubscribe**.
- **4.** To subscribe to an object, select the object from your organization that you want mapped to it. If you don't want to subscribe to an object, select --None--. Only objects that the connected organization has published will appear in the list.
- **5.** Select Auto-Accept for an object if you want to automatically accept that object's records when forwarded by your connected organization. This option only appears after you select a mapping. This option isn't available for:
 - Child objects (Opportunity products, tasks, and public case comments are automatically
 accepted when the parent record is accepted. Notes and attachments are automatically
 accepted if marked public and the Share With Connections option is selected.)
 - Objects that have one or more master objects, such as custom junction objects or detail objects in a master-detail relationship.

6. Click Save.



Once you have subscribed to an object, you can map published fields on that object to fields on your object. For example, you can map the Description field on leads to a custom field on leads called Partner Description. This would allow you to use your own field to describe the lead for users within your organization rather than using the description provided by your business partner.

Additional Considerations

- If you choose to auto-accept leads or cases, any active assignment rules in your organization run when a record is automatically accepted.
- In order to automatically accept a record shared by your connection, the connection owner for that record must be an active user.

EDITIONS

Available in: Salesforce Classic

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To subscribe to published objects:

Subscribe to Fields in Salesforce to Salesforce

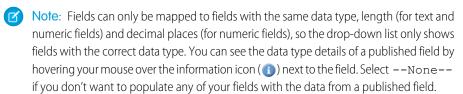
When you accept an invitation from a business partner to join Salesforce to Salesforce, you can subscribe to fields that your business partner has published and map those fields to your fields. When your business partner updates the fields on a record that you're sharing, the fields will be updated on the shared record in your organization.

For example, if your business partner has published the Description field, you could map that field to a custom field called Partner Description. This would allow you to use your own field to describe the lead for users within your organization.

Before subscribing to fields, see Best Practices for Mapping Fields in Salesforce to Salesforce.

To map fields on a subscribed object:

- 1. Click the Connections tab.
- 2. Click the name of the connection you want to modify.
- 3. In the Subscribed Objects related list, click **Edit** next to an object.
- **4.** Map your business partner's published fields to your organization's fields by choosing the appropriate field in the drop-down list.



EDITIONS

Available in: Salesforce Classic

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To subscribe to published fields:

Manage Connections

- 5. If the field is a picklist, click **Edit Values** to map each published picklist value to a picklist value in your organization.
- 6. Click Save.
 - Note: Changes to field mappings and picklist values may not show up in your business partner's organization for up to 15 minutes while Salesforce refreshes the cache. This cache enables us to support larger transaction volumes and reduce the number of API calls that count against your organization's limits.

SEE ALSO:

Publish Fields in Salesforce to Salesforce

Automate Updates with Workflow Rules in Salesforce to Salesforce

You can use workflow rules to automate updates to records and connections in Salesforce to Salesforce. You can use workflows for many processes, including updating values on picklists when a connection has edited the field. If your organization is set up to automatically accept records, workflow rules are triggered by any field you subscribed to.

Workflow rules are only triggered for records shared in Salesforce to Salesforce when you accept a parent record, a child record is inserted, or you are subscribed to the fields that are configured to trigger the workflow rules

Some suggestions for criteria for workflow rules for Salesforce to Salesforce include:

- Received Connection Name field on leads, opportunities, and custom objects
- Current User equals pnet
- Last Modified By field equals Connection User

For example, you can create a task for a user every time a connected organization updates a lead.

- 1. Create a workflow rule with specific criteria.
 - Evaluation criteria: Evaluate the rule when a record is: created, and every time it's edited
 - Run the rule when criteria are met.
 - Rule criteria: "Lead: Last Modified By equals Connection User".
- 2. Add a workflow task.

When you accept a record, only certain fields trigger workflow rules.

EDITIONS

Available in: Salesforce Classic

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

Workflow is available in: Enterprise, Performance, Unlimited, Developer, and Database.com Editions

| Object | Fields Triggering Workflows |
|---------|-------------------------------|
| Account | Account Name |
| | City |
| | Country |
| | Received Connection Name |
| | Sent Connection Name |
| | State |
| | Type |
| Case | Case Number |
| | Priority |
| | • Status |
| | Subject |
| | Type |
| Contact | • Email |
| | Last Name |
| | Mailing Address |
| | Phone |

| Object | Fields Triggering Workflows | |
|---------------|-----------------------------|--|
| | • Title | |
| Lead | Company | |
| | • Email | |
| | • Industry | |
| | • Lead | |
| | Lead Source | |
| | • Name | |
| | No. of Employees | |
| | • Phone | |
| | Received Connection Name | |
| | Sent Connection Name | |
| | • State | |
| | • Status | |
| | • Title | |
| Opportunity | Account Name | |
| | • Amount | |
| | Close Date | |
| | • Name | |
| | Received Connection Name | |
| | Sent Connection Name | |
| | • Stage | |
| Custom Object | Connection Name | |
| | • Name | |
| | Sent Date | |

Sometimes it makes sense to use an Apex trigger instead of a workflow. Suppose that you have a workflow rule that updates a secondary field, **field B**, when **field A** is updated. Even if your Salesforce to Salesforce partner subscribed to fields A and B, updates to field B that are triggered by your workflow rule aren't sent to your partner's organization. This prevents a loop of updates.

If you want such secondary field updates to be sent to your Salesforce to Salesforce partners, replace the workflow with an Apex trigger that uses post-commit logic to update the secondary field.

In bi-directional connections, Salesforce to Salesforce updates are triggered back only on "after" triggers (for example, "after insert" or "after update"), not on "before" triggers.

Share Records Using Salesforce to Salesforce

Once you've created a connection to another Salesforce organization, you can share records and updated data with them. You control the type of records you share with your connected organizations by selecting which objects and fields to publish. Your connected organizations don't have direct access to records that you're sharing. They have a record in their organization that is connected to your record through Salesforce to Salesforce. Any updates to the shared information on either record is reflected on the other record.

Forward Records to Another Salesforce Organization

To share records with a connected organization using Salesforce to Salesforce, you forward them or assign them to a gueue. You can forward the same records to multiple connected organizations.

Accept Records Forwarded from a Connected Organization

With Salesforce to Salesforce, you can select which type of records you want to accept from a connected organization that shares them. You can't accept forwarded records on the Salesforce mobile app.

Criteria for Automatically Accepting Related Records from a Connected Organization

With Salesforce to Salesforce, if you accept a parent record that's forwarded from a connected organization, any related or child records sent with it are automatically accepted as long as certain criteria are met.

SEE ALSO:

Publish Fields in Salesforce to Salesforce Subscribe to Fields in Salesforce to Salesforce Guidelines for Using Salesforce to Salesforce

EDITIONS

Available in: Salesforce Classic

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and **Developer** Editions

Forward Records to Another Salesforce Organization

To share records with a connected organization using Salesforce to Salesforce, you forward them or assign them to a queue. You can forward the same records to multiple connected organizations.



Note: To be able to forward records of a certain type of object, your organization must first publish that object.

To forward a record, view it. Then, in the External Sharing related list, click Forward.

To forward related or child records, you should select them when you're forwarding the parent record. You can forward related records separately, but they won't be related to their parent if they aren't forwarded with their parent.

To forward attachments, you must select them when you're forwarding their parent record.

You can forward multiple records from a list view.

- 1. Select the records that you want to forward.
- 2. Click Forward to Connections
- **3.** Select the connection(s) to forward the record to in the Available Connections list.
- **4.** Click the Add arrow to move the connection(s) to the Selected Connections list.
- 5. Optionally select Send Notification Email (new invitees only) to send email notifying the connection's representative that you forwarded the record. Only new recipients of the record receive the email; connections that you previously forwarded the record to don't receive another email.
- **6.** Select the related or child records that you want to forward along with the parent.
- 7. Click Save

Any lead record you are forwarding must include a populated Company Name field.

Don't forward a record to the connection that originally shared it. Doing so causes errors when Apex triggers run.

SEE ALSO:

Publish Objects with Salesforce to Salesforce
Share Records Using Salesforce to Salesforce
Statuses for Records Shared with Salesforce to Salesforce
Guidelines for Using Salesforce to Salesforce

EDITIONS

Available in: Salesforce Classic

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To assign records to a connection:

 Read and Edit on the record

To stop sharing a record:

 Read and Edit on the record

To forward multiple records to a connection:

Accept Records Forwarded from a Connected Organization

With Salesforce to Salesforce, you can select which type of records you want to accept from a connected organization that shares them. You can't accept forwarded records on the Salesforce mobile app.



Note: To be able to accept records of a certain type of object, your organization must first subscribe to that object.

- 1. Select the tab of the record type you are accepting. For example, the Leads tab.
- 2. View a connections list view. For example, on the Leads tab, in the Leads from Connections section, select a list view from the drop-down list.
- **3.** For accounts, contacts, and opportunities, click **Accept** next to the record you want to accept. For cases, leads and custom objects, select the type of records to accept, then click **Accept**. In most cases, if you accept a parent record, any related or child records forwarded with it are automatically accepted.

You can assign an accepted record to yourself, another user, a gueue, or, if it is a lead or case, use your organization's assignment rules to automatically assign it. If the record is a child of another record you have accepted, you can assign it to the parent record when accepting it.

When you accept an opportunity, you have the option to relate the opportunity to an object and a price book, and to relate the opportunity to a new account or opportunity, or to use an existing account or opportunity. If you create a new opportunity or account, you can also set the owner of that record. When you accept an account, you have the option relate the account to another object and to create a new account, or to use an existing account. If you create a new account, you can

EDITIONS

Available in: Salesforce Classic

Available in: **Contact** Manager, Group, Professional, Enterprise, Performance, Unlimited, and **Developer** Editions

USER PERMISSIONS

To accept shared records:

Read and Edit on the object

To view records shared by a connection:

Manage Connections or have access to the list view

also set the owner of that record. When you accept a contact, you have the option relate the contact to another object and to create a new account or contact, or to use an existing account or contact. If you create a new contact or account, you can also set the owner of that record. When you accept a case, lead or custom object, you have option to relate the case, lead or custom object to another object and to assign the lead or custom object to a new owner.

If you select the **Assign using active assignment rule** option and no assignment rule criteria is met, the record is assigned to the Default owner of the record type. When you accept a product, you have the option to create a new product or relate the product to an existing product. If you accept a parent and its child record, the name of the parent is displayed in the child's Parent Record Name column. If the record is a parent record or has no parent record, this column is blank. When you accept a record that has a public attachment, the attachment is automatically accepted if you select the Share With Connections option next to it.

If validation rules prevent you from accepting shared records, create a validation rule with the Received Connection Name field not equal to null; this will ignore validation rules for records you accept from your connections. To create this rule, use the following formula:

```
IF(OR(ISNEW(), ISNULL(Id)), if(ConnectionReceivedId =null,
TRUE, FALSE), NOT (AND (ISCHANGED (ConnectionReceivedId),
NOT(ConnectionReceivedId = null)))))
```

You should also create a similar rule for any Apex trigger that has validation checks.

SEE ALSO:

Subscribe to Objects with Salesforce to Salesforce Share Records Using Salesforce to Salesforce Guidelines for Using Salesforce to Salesforce

Criteria for Automatically Accepting Related Records from a Connected Organization

With Salesforce to Salesforce, if you accept a parent record that's forwarded from a connected organization, any related or child records sent with it are automatically accepted as long as certain criteria are met.

Here's the criteria for automatically accepting related or child records.

- The child's object type is published to your connection and your connection is subscribed it.
- The parent record must already be accepted in the organization.
- The record must be related to the parent record.
- The related record cannot have two master records.
- The related record cannot have multiple relationships to the same parent object.
- The connection owner must be an active user.
- The owner of the parent record must be an active user.

Here's criteria for attachments to be automatically accepted along with their parent.

- The Attachment object type is published to your connection and your connection is subscribed to the object.
- The parent record for the attachment is shared with the connection.
- The attachment is not marked "Private."
- The Share With Connections option on the attachment is selected.
- The attachment is 20 MB or less.

Important: When related records are accepted automatically, there may be a slight delay before they are visible in the related list of the parent record. Additionally, when a related record is shared using the **Manage Connections** link in the related list of a parent record, there may be a slight delay before the Sent Connection Name displays.

If a related record does not meet the criteria for automatic acceptance, it will need to be manually accepted from its object tab. For example, an opportunity record will need to be accepted from the Opportunities tab. A child record that needs to be manually accepted will display with the parent record name so that it can be properly assigned.

SEE ALSO:

Subscribe to Fields in Salesforce to Salesforce Forward Records to Another Salesforce Organization

EDITIONS

Available in: Salesforce Classic

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

USER PERMISSIONS

To accept or reject records:

Read and Edit on the record

Report on Salesforce to Salesforce Activity

To track Salesforce to Salesforce activity and updates, create custom reports.

There are a number of ways you might use custom reports in Salesforce to Salesforce.

- To track your survey responses in one location, create a custom list view or custom report. Also, add the Connection Finder field to contact and account list views and reports.
- To track connection activity and details, create a "Connections with Accounts" custom report type. The report only displays connections that are associated with accounts.
- To view connection information for your published or subscribed objects, create custom report types for those objects.
- To view which records are shared with multiple connections, create a custom report for the shared objects. To view records shared with multiple connections in a list view, add the Sent Connection Name field to an existing or new view and verify that enhanced lists are disabled.
- To view shared leads that were deleted by a connected organization, create a "Connections with Leads" custom report type .

EDITIONS

Available in: Salesforce Classic

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

Workflow is available in: Enterprise, Performance, Unlimited, Developer, and Database.com Editions

Guidelines for Using Salesforce to Salesforce

Review some guidelines for using Salesforce to Salesforce.

- System administrators can share all records, but most users can only forward records that they (or their subordinates) own.
- You can stop sharing a related record from its parent record. Select the parent record. In the
 related list of the record you want to stop sharing, click Manage Connections in the Sent
 Connection Name column. Then, select the connection(s) that you want to stop sharing within
 the Selected Connections list. Click the Remove arrow () to move the connection(s) to the
 Available Connections list. Click Save.
- To stop sharing a record, view the record and click **Stop Sharing** in the External Sharing related list. You can only stop sharing records that you or your subordinates own. When you stop sharing the record with a connection, changes to the record in your organization are not reflected on the record in the connection's organization. The shared record is not deleted from the other organization.
- To stop sharing a case comment or attachment, you must make the records private.
- An opportunity product is related to both opportunity and product records. For this reason, it can only be shared as a child record of a shared opportunity, provided the associated product is also shared. If all of the following criteria are met, opportunity products are automatically shared with connections.
 - The Opportunity Product object type is published to your connection, and your connection has subscribed to the object.
 - The opportunity and the product associated with the opportunity product are shared with your connection.
 - In the connection's organization, the opportunity is associated with an active price book during acceptance.
 - In the connection's organization, the product is associated with the same active price book as the opportunity.
 - In the connection's organization, the product is active.
 - In both organizations, the opportunity currency is the same.
- You can share a case comment as a child record of a case. Case comments are automatically accepted by a connection, providing the following criteria are met:

EDITIONS

Available in: Salesforce Classic

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

Workflow is available in: Enterprise, Performance, Unlimited, Developer, and Database.com Editions

- The Case Comment object type is published to your connection, and your connection has subscribed to the object.
- The case to which the case comment is associated is shared with the connection.
- The case comment is not marked "Private."
- If an error occurs when accepting a record, see the Connection History for details.
- A related record will no longer be shared with a connection if the related record is edited from an unshared record.
- A maximum of 100 tasks per related record can be shared. This maximum includes open and closed tasks.
- After accepting a shared record, if you update a field that your business partner has subscribed to, the field is automatically updated
 on the record in your business partner's organization. Likewise, if your business partner updates a field to which you have subscribed,
 it is automatically updated in your organization. When your business partner updates the record, the Last Updated By field
 will be set to "Connection User".
- When your business partner shares child records at a later time using the **Manage Connections** link in the related list of a record you have already accepted, the child records can be automatically added to your organization.
- Currently, if you edit the stage of multiple opportunity records by performing a global find and replace, that change will not be reflected in organizations that you had forwarded the records to in Salesforce to Salesforce. For example, suppose you perform a global find and replace which causes the stage of all inactive opportunities to change from Inactive to In Review. If any of the affected opportunities had been forwarded to a business partner in Salesforce to Salesforce, those opportunities will still be in the Inactive stage in your partner's Salesforce organization. For the stage change to be reflected in their organization, they would need to open each affected opportunity, click **Edit**, and click **Save**.
- When you convert a lead, Salesforce to Salesforce inactivates the shared record and updates the External Sharing related list in your connection's lead record with an Inactive (converted) status. Due to inactivation of the shared record, changes to the Lead Status during conversion aren't reflected in your connection's lead record.
- Once you accept a record, you can make it available to other connections in the same way you can make any record available using Salesforce to Salesforce. This allows you to work in a multi-tiered business network. In a multi-tiered network, changes made to the shared record in any organization updates the information in all the organizations that are sharing the record.
- Because updates to shared records are processed asynchronously and retried if a sync fails, they don't appear in the connected organization right away.
- When sharing opportunity products, keep these additional rules in mind:
 - If quantity or revenue schedules are enabled in the connection's organization, Quantity and Sales Price fields won't be updated
 in their organization.
 - If the price book associated to the opportunity product is changed or deleted in one organization, the opportunity product will
 no longer be shared.
 - If the opportunity is no longer shared, the opportunity product will no longer be shared.
- If you are expecting to receive large volumes of records from a connection, enable Auto-Accept for the appropriate objects. For example, if a connection shares a large number of leads with your organization on a regular basis, select the Auto-Accept checkbox next to Opportunity on the Add or Remove Subscribed Objects page.
- To see changes made by a connection, enable field tracking on the object and add the history related list to page layouts. Another option is to create a custom history report that includes the Received Connection Name field.
- To automatically assign all incoming leads or cases to a specific user, create an assignment rule that includes the following rule entries:
 - Received Connection Name contains name of connection
 - Created By contains Connection User

You can do the same with escalation rules.

- If you want to assign a case to a connection using an escalation rule on the case, you must assign the case to a queue where the connection is a member. For example, if you have a connection that acts as your third-party service agency and all cases meeting certain criteria should be escalated to this connection, you must:
 - Create a queue that contains the connection as a member.
 - Create an escalation rule with the appropriate criteria.
 - Add an escalation action that automatically assigns cases meeting the specified criteria to that queue

SEE ALSO:

Salesforce to Salesforce

Best Practices for Mapping Fields in Salesforce to Salesforce

Statuses for Records Shared with Salesforce to Salesforce

Salesforce to Salesforce lets you share records with connected organizations. When viewing a shared record, the header shows the record's sharing status. The record may also contain the External Sharing related list, which shows sharing details and status.

| Status of Shared Record | Description |
|-------------------------|--|
| Active (sent) | The record has been forwarded to and accepted by an external organization. |
| Active (received) | The record has been sent to you from an external organization, and it has been accepted. |
| Pending (sent) | The record was forwarded to but not yet accepted by an external organization. |
| Inactive | The record is no longer shared with an external organization. |
| Inactive (deleted) | The record was accepted by an external organization, but that organization has deleted the record. |
| Inactive (converted) | The record is a lead that was accepted by an external organization and converted into an opportunity by that organization. When a lead is converted, Salesforce to Salesforce inactivates the shared record so that it is no longer updated in the subscribing connection. |
| | Note: If you change the Lead Status during conversion, it is not reflected in the subscribing connection. |

EDITIONS

Available in: Salesforce Classic

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

SEE ALSO:

Share Records Using Salesforce to Salesforce Forward Records to Another Salesforce Organization

Best Practices for Mapping Fields in Salesforce to Salesforce

When you subscribe to a field in Salesforce to Salesforce, you map it to a field in your organization. This mapping lets updates to that field sync for all shared records. Before you map fields, look at these important best practices.



Important: This information applies to standard Salesforce to Salesforce connections. If you're mapping fields for a replication connection as part of Organization Sync, some of this information may not apply.

EDITIONS

Available in: Contact Manager, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

Auto-Mapping Fields

- When subscribing to fields, select **Auto-Map Fields** to automatically map your business partner's fields to your fields. After you select this option, click **Save** for your changes to take effect.
- For any unmapped field, Salesforce checks if the field's API name matches that of any of your fields. If there are no matches, Salesforce checks for matching field labels. If Salesforce still can't find a match, --None-- is selected.
- Selecting Auto-Map Fields doesn't overwrite previous selections, and deselecting it doesn't affect fields that were mapped previously.
- The following standard fields are automatically mapped:
 - Account: Account Name, and, if you are using person accounts, Last Name
 - Attachment: Body, Content Type, File Name
 - Case: Subject
 - Case Comment: Body and Published
 - Contact: Last Name
 - Custom Object: Name
 - Lead: Last Name and Company
 - Opportunity: Name, Closed Date, and Stage
 - Product: Product Name
 - Task: Subject
 - Opportunity Product: Quantity, Sales Price

Mapping Picklist Fields

- If a picklist value is mapped to --None--, and your business partner enters a picklist value, your picklist field is to the same value. For example, if you subscribe to the Lead Status picklist, and your business partner has the value Internal in that picklist, your record gets a lead status of Internal.
- To convert a custom field to a picklist field, stop publishing the field, change the field type, then publish the field again.
- When mapping picklist fields, if the subscribed org has the picklist field restricted to the values defined in the value set, and the publishing org does not have this restriction, the field is not available for mapping on the subscribing org.

Mapping Currency Fields

• If you map a currency field, and a record shared by your connection uses a currency that your organization hasn't enabled, that currency field isn't updated when your organization auto-accepts the record. If you're manually accepting the record, the currency is updated only if your organization uses the same currency as the record.

For example, suppose that your connection has shared an opportunity with you. Your organization uses the Euro only. Your connection updates the opportunity amount to \$300. The opportunity amount isn't updated in your record because your organization doesn't support the U.S. Dollar.

- If you map a currency field and either you or your connection changes the currency on a record containing that field, updates you make to the field are no longer propagated to the other organization, and updates your connection makes to the field aren't reflected in your organization.
- You can map roll-up summary fields to currency fields with the same currency type. For example, a roll-up summary with the currency type U.S. Dollar can be mapped to a currency field that uses the U.S. Dollar.

Mapping Quantity and Revenue Schedules

• If Quantity Schedules or Revenue Schedules are enabled in your connection's organization and you subscribe to the Products object from that connection, you must subscribe to the following fields and map them to matching fields in your organization.

| Type of Schedule | Fields to Map |
|-------------------|--|
| Quantity Schedule | Number of Quantity InstallmentsQuantity Installment PeriodQuantity Schedule Type |
| Revenue Schedule | Number of Revenue InstallmentsRevenue Installment PeriodRevenue Schedule Type |

Mapping Different Field Types

- Only map person account fields to person account fields, and business account fields to business account fields.
- If your connection is using person accounts and you aren't, the person account field Last Name is used as the Account Name
 when your connection shares a person account record with you. If you enable person accounts, you are automatically subscribed
 to Last Name. Any changes to Last Name and Account Name are synced.
- You can't map a standard number field to a custom number field.
- You can map lookup fields to text fields that have a length of 80 or more characters. If your connection edits a lookup field that you mapped to a text field, the text field is updated with their changes.
- You can map auto-number fields to text fields that have a length of 30 or more characters.
- You can map formula fields to fields of the same data type; for example, a formula field that has a number data type can be mapped to a field with a number data type. If a formula field is a text data type, it can be mapped to a text field with a length of 80 or more characters. Conversely, fields can't be mapped to formula fields; for example, a formula field with a currency data type can be mapped to a currency field, but a currency field cannot be mapped to a formula field. System audit fields are not supported.

Unsubscribing to Fields

- You are automatically unsubscribed from a field if:
 - Your business partner stops publishing the field
 - You delete a custom field that is mapped to a published field
 - The field type of a custom picklist or custom multi-select picklist is changed (for example, if a custom picklist is changed to a text field)
- When publishing fields, consider sending your business partner information about the fields. This helps them to create a mapping strategy that makes sense for your program.

Sales Productivity

- Translate your published custom field names into the languages your partners use. This allows them to see the field names in their own language.
- If you're using person accounts, and your connection has not enabled person accounts, the person account Last Name is used as the Account Name when you share a record. If your connection enables person accounts, they are automatically subscribed to Last Name. Any changes to Last Name and Account Name are synchronized.
- If you want to publish the Middle Name, Informal Name, and Suffix fields on contacts, the fields must be enabled in both your org and your partner's org, or your partner's org must be configured to auto-accept contacts.

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