



USING FORCE.COM CONNECT FOR OFFICE

Summary

Lightning Platform Connect for Office provides add-ins for Microsoft® Excel and Word. In Excel you can access Salesforce reports, and in Word you can create mail merge templates for use with Salesforce.

System Requirements

The system requirements for Connect for Office are:


- 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](#).

Before Importing

You may need to create a custom report, depending on the data set you want to import into Excel.

Lightning Platform Connect for Office

Installing Connect for Office


 **Important:** The [Microsoft® Excel Add-On](#), the [Microsoft® Word Add-On](#), and the [standard Mail Merge feature](#) will be retired in February 2019. If your sales reps still use these features, check out the linked product retirement articles for more details.

1. Close all Microsoft Office programs, including Word, Excel, and Outlook.
2. From your [personal settings](#), enter *Office* in the [Quick Find](#) box, then select **Connect for Office**.
3. Click **Install Now**.
4. Click **Yes** when prompted to install Connect for Office. We recommend that you accept the default installation folder suggested by the installer.
5. After the installation completes, open Word or Excel, and look for the new toolbar that contains a **Salesforce** drop-down menu.
 - When opening Word, you may be prompted to enable macros from Salesforce. Please enable the macros and always accept Salesforce as a macro publisher. The Connect for Office Word add-in works only if the macros are enabled.
 - The Connect for Office installer edits the Microsoft Windows registry on your computer. If you have insufficient privileges to edit your computer's registry, contact your IT department.

About the Excel Add-In

The Connect for Office Excel add-in integrates Salesforce reports with Excel. You can:

- Import Salesforce data into Excel and apply formulas and formatting
- Combine different data sets using Excel's VLOOKUP function
- Refresh data in Excel with information from Salesforce
- Build dashboards using Excel pivot tables and charts

 **Note:** When importing a report to Excel, you can export up to 256 columns and 65,536 rows of data at one time.

Using the Excel Add-In

Begin by clicking **Log In** from the **Salesforce** drop-down menu and entering your Salesforce username and password. Then choose a command:

- **Import Existing Reports**
 1. In the dialog box, select a report from the list.

2. Specify the worksheet where the report data will be imported.
 3. Choose **Raw Data** to import the data without formatting, subtotals, or grand totals. Choose **Formatted** to keep the colors, fonts, subtotals, and grand totals from the Salesforce report.
 4. Click **OK**.
 5. Save the Excel worksheet.
- **Refresh Existing Reports**
 1. In the dialog box, select the Salesforce reports you want to re-import to Excel.
 2. Optionally, select **Update Pivot Tables** to update any pivot tables you have created in Excel with new, re-imported data.
 3. Click **Refresh Selected**.
 - **Refresh All Reports**
 - Refreshes all Excel worksheets to which Salesforce reports have been imported, including pivot tables.

Maintaining Excel Formatting

To ensure that your Excel columns and formatting are not altered during a refresh, do the following:

- Import formatted data into Sheet1. Then define formulas on Sheet2 that reference Sheet1. For example, the value in Sheet2 cell b10 is =sheet1!b10.
- Then, format Sheet2 as needed.
- When you refresh, new data goes into Sheet1. The referenced values and formulas in Sheet2 do not lose formatting.
- However, the copy in Sheet2 can break if the format of the raw data changes. For example, changes in the report criteria would change the number of report rows or columns.

Excel Add-In Tips

- **Writing Formulas**
 - Select entire columns when writing formulas because the number of rows may change when you refresh report data
- **Using VLOOKUP**
 - Link data across reports using Excel's VLOOKUP function
 - Combine results from different data sets using VLOOKUP
 - VLOOKUP may make report record IDs case-insensitive
 - For information about VLOOKUP, search for "VLOOKUP function" in Excel's Help
- **Using Record ID Fields**
 - When using a record's 15-character ID field with the VLOOKUP function, use the ID field plus a unique item—for example, ID + Email on contacts
 - Double-check ID fields because they are case-sensitive
- **Importing Reports**

- Use the **Raw Data** option to retrieve data only
- Use the **Formatted** option to keep Excel files small
- Avoid renaming worksheets that contain imported reports
- **Refreshing Pivot Tables**
 - Refresh pivot tables often to ensure your data is up-to-date
- **Distribution**
 - Link data from Excel into Word or other Office applications
 - Distribute Excel files using the Documents tab

About the Word Add-In

The Connect for Office Word add-in helps you create mail merge templates in Word for use with the mail merge utility in Salesforce. You can:

- Create professional documents that incorporate your Salesforce data
- Access a complete list of valid Salesforce merge fields
- Merge updated Salesforce data into your documents with a single click
- Quickly generate personalized proposals, quotes, and letters
- Add a table of opportunity products to a proposal

Using the Word Add-In

1. Open Microsoft Word.
2. Select **Log In** from the **Salesforce** drop-down menu on the toolbar. (Word 2007 users, first go to the **Salesforce** tab on the Ribbon and then click **Log In** from the **Merge Fields** drop-down button.)
3. Enter your Salesforce username and password.
4. Click **Login**.
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.
7. Select **Insert Merge Field** from the **Salesforce** drop-down menu. (Word 2007 users, first go to the **Salesforce** tab on the Ribbon and then click **Insert Merge Field** from the **Merge Fields** drop-down button.)
8. In the Insert Merge Fields dialog box, select the type of field and then select the merge field you want to insert.
9. Click **Insert** to insert the merge field.
10. When 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**.

Working With Opportunity Products

To add opportunity product data to your template:

- Select **Opportunity Line Item Fields** and choose the fields to insert. This inserts a table with the selected merge fields and the special “start” and “end” fields.
- Modify this table as needed but the “start” field must be before all opportunity product merge fields and the “end” 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.