Outlook Integration Implementation Guide

Salesforce, Summer '20

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OUTLOOK INTEGRATION

The Salesforce integration with Outlook is one of a suite of products that give sales reps the power to work from their email applications, while keeping Salesforce data up to date. The integration provides Salesforce data directly within Outlook, and the ability to log emails and events to Salesforce records. Add Einstein Activity Capture to automate email and event logging and to sync contacts and calendar events between Salesforce and Outlook. To learn more about other products available, see Salesforce Help.

For security considerations for the Outlook integration, see Salesforce Email Integration Security Guide. For security considerations for Einstein Activity Capture, see the Einstein Activity Capture Security Guide.

This guide discusses the Exchange server settings, Salesforce setup, and a short client-side procedure required to set up the integration. The initial setup requires a Salesforce administrator, the IT pro who maintains your Microsoft Exchange server, and the sales reps running the integration in Outlook.

After you're set up, use the Lightning App Builder to create custom email application panes that can include different features for different sales reps. Find the details about what is customizable and how to use the Lightning App Builder in Salesforce Help.

OUTLOOK INTEGRATION SYSTEM REQUIREMENTS

Make sure that your system meets these requirements before you integrate with Microsoft® Outlook®.

What	Requirements
Email server	Either: • Exchange Online with Office 365 • Exchange 2019, 2016, or 2013 on-premises Review Setting Up Your Microsoft Exchange Server. Depending on your email server version, integrating Salesforce with Outlook requires server configuration and an IT professional who maintains your Exchange server.
Email clients	Either: • Office version 16.0.11629 or later running on Windows 10 version 1903 or later, most recent stable version recommended, including Office 365 and 2019 one-time purchase (retail) Before December 2020, the Outlook integration also supports Outlook 2016 and 2013. Changes to the Microsoft Office add-in framework and the end of support for Internet Explorer 11 requires Office version 16.0.11629 to continue using the Outlook integration after December 2020. For more information, see the information about browsers used by Office add-ins in the Microsoft documentation. Your Outlook and Windows combination must support a browser other than Internet Explorer 11 after December 2020 to continue using the integration. • Outlook on the web • Microsoft Outlook for Mac 2019 or 2016 on the most recent stable version of the macOS ⊘ **Important:** The Outlook integration is built on the Microsoft Office add-in framework. Microsoft develops and maintains that framework and it is a non-SFDC application. To ensure you're running the most secure version, we recommend always running the latest version of Outlook and Windows and applying all available security updates from Microsoft. For the best experience, we recommend using an Outlook version that supports pinning the Salesforce pane so that it's always open. The pin is available in the following versions: • For Current or Office Insider channels users, the pin is available in Outlook 2016 for Windows build 7668.2000 and later. • For Outlook on the web users, the pin is available if the backend is Office 365.

What	Requirements
	• For Outlook for Mac users, the pin is available in version 16.13.180513 and later.
	• For Deferred channel users, the pin is available in Outlook 2016 for Windows build 7900.xxxx and later.
Browser	For Outlook on the web users, 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. Set **Content Blocking** to **Standard** or **Strict**. Add Salesforce domains as exceptions along with `https://*.outlook.com`, `https://*.office365.com`, and `https://*.office.com` and any Outlook URL used for login.
	• Apple® Safari®, most recent stable version. Turn off **Prevent cross-site tracking**.
	• Microsoft Edge, most recent stable version (Windows only)
	If you're using the Outlook integration in a desktop version of Outlook, Microsoft Edge is required on the desktop computer. The Microsoft Office add-in framework uses that browser to launch the app. You're not required to use Microsoft Edge as your default browser.
	📝 Note: If you're using an older version of Windows and Outlook, it's possible that the add-in framework is still using Internet Explorer 11. However, Salesforce support for Internet Explorer 11 ends in December 2020. Your Outlook and Windows combination must support a browser other than Internet Explorer 11 after December 2020 to continue using the integration. For more information, see the Microsoft documentation.
Security encryption protocol on your email server	TLS 1.2 or later.

Other Features	Requirements
Server configurations	We support using terminal servers, such as Citrix® servers.
Microsoft AppSource Store Access	To run the integration in Outlook, each user must have the Salesforce add-in, available in the Microsoft AppSource store. Your Exchange or Office 365 administrator can install the Outlook integration for to all users with Microsoft Centralized Deployment. Or, if Outlook users can access the store, they can install the integration themselves.

SET UP THE INTEGRATION WITH OUTLOOK

The integration between Salesforce and Microsoft® Outlook® requires both server-side setup and a short client-side setup procedure. Review the system requirements and ensure that your email server is set up to communicate with the integration. Turn on the integration and push the Salesforce add-in to your Outlook users.

Note: The Outlook integration and the ability to sync contacts and events with Einstein Activity Capture or Lightning Sync are often used together. If you're also setting up Einstein Activity Capture or Lightning Sync, there's setup required for those products and features.

Considerations for Setting Up the Outlook Integration

Before setting up the integration with Microsoft® Outlook®, consider which features you want to enable and whether sales reps need access to different components.

Setting Up Your Microsoft Exchange Server for the Outlook Integration

The Outlook integration runs as a Microsoft Office add-in. Depending on your Exchange server version, the server requires that you set up Exchange Web Services so the server can communicate with Salesforce. Work with your IT professional who maintains your Exchange server to establish a connection with the add-in.

Turn On the Outlook Integration in Salesforce

Turn on the Outlook integration so your sales reps can access Salesforce in Microsoft® Outlook®.

Distributing the Outlook Integration Add-In Using Microsoft Centralized Deployment

To use the Outlook integration, each sales rep needs the Salesforce add-in, which is available from the Microsoft AppSource store. We recommend that you work with your IT department to distribute the add-in using Microsoft Centralized Deployment from the email server. Distributing the add-in is helpful when users don't have the permissions required to install add-ins themselves or when they can't reach the Microsoft AppSource store.

Enable Event Type Selections to Log Events from Outlook or Gmail

Use the Type field on the Event object to provide sales reps a selection list to identify the type of event logged from the Outlook or Gmail integration. If the field is visible, reps can choose from a list of event types to classify the event they're logging. Customize the Type field's picklist values to reflect the types of communications in your business.

Considerations for Setting Up the Outlook Integration

Before setting up the integration with Microsoft® Outlook®, consider which features you want to enable and whether sales reps need access to different components.

Email Server Setup

- Setting up the Salesforce integration with Outlook requires administrative access to Salesforce, and in some scenarios, to your email server. Work with your IT professional for server configuration, and review which role is required for each step in the process.

- The Exchange server setup depends on the Outlook version, whether your Exchange server is online or on-premises, and the features you need in the integration.

  - If Outlook is running a JavaScript API v1.7 or earlier, your Exchange server is on-premises, or you have an Inbox license, work with your IT pro to set up the Exchange server.

  - (Pilot) If Outlook and Exchange are running JavaScript API v1.8 or later, and you don't have an Inbox license, you can set up the Outlook integration without special setup of the Exchange server. If you meet these requirements, contact your Salesforce account representative for more details about setting up the Outlook integration. To determine which API version is available in each Outlook application, see the Microsoft Documentation about the JavaScript API.

Email Client

For better performance, turn on **Use Cached Exchange Mode** in the Outlook Account Settings on the client. When Use Cached Exchange Mode is on, an error can occur more often because an email is temporarily out of sync with the Exchange Server. To learn more, see the Microsoft documentation.

Add-In and Salesforce Setup

- Each sales rep needs the Salesforce add-in within Microsoft Outlook, which is available from the Microsoft AppSource store. To ensure that all users have add-in, we recommend that Exchange administrators use Microsoft Centralized Deployment. Deploying the add-in is helpful when users don't have the permissions required to install add-ins themselves, or can't reach the Microsoft AppSource store. If they access to the store, Outlook users can download the add-in themselves from the store. The add-in includes the base integration experience and the option to add Inbox features. A local install file isn't available.

- The add-in automatically updates with each Salesforce release. There's no need to get a new version of the add-in when a new Salesforce release is available.

- When Salesforce is set up with single sign-on (SSO), reps are asked to log in to Salesforce the first time they access the integration in Outlook. The **Log In to Salesforce** button opens the Salesforce login page. In typical MyDomain and SSO configurations, reps can enter a custom domain name. You can't store the domain name in Outlook or in the add-in. Reps use the Custom Domain option when logging in and to enter the domain. After sales reps navigate to the domain, they're authenticated in Salesforce and working in the Outlook integration.

- If you set up Salesforce users with two-factor authentication, two-factor authentication is required in the integration in Windows versions of Outlook and Outlook on the web. Due to limitations in Outlook for Mac, two-factor authentication for the integration isn't supported in that version of Outlook.

- Salesforce includes a managed list of Microsoft Outlook web app domains, such as outlook.com and office365.com. To ensure that your reps who access their Outlook email on the web can use the integration, use the Salesforce-managed list on the integration

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

setup page. Add any of your own trusted domains, such as webmail.your_company.com if your users access Outlook on the web using URLs specific to your company.

Outlook Integration Features and Optional Setup

- The Outlook integration uses email application panes to define the layout of components in the integration side panel. It includes a default pane to get you up and running quickly. You can customize panes to better fit your needs.To include, exclude, or reorder components in the pane, create custom email application panes, and assign them to specific user profiles.

- The Outlook integration uses publisher layouts to define the global quick actions, such as creating contacts, leads, and opportunities. The integration includes a default set of actions. To give users access, or deny access, to certain global quick actions within the integration, add or change the publisher layout.

- 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. Einstein Activity Capture requires the Lightning Experience, and Einstein insights are only available with a Sales Cloud Einstein license.

- 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.

- The Log on Send page in the integration doesn't include an option to include attachments like the log email page for read email does. To log attachments automatically when using Log on Send, make sure that your reps have the **Always save email attachments** setting selected in their My Email to Salesforce settings in Salesforce. If **Always save email attachments** isn't selected, attachments in emails sent using Log on Send aren't logged. However, reps can log their attachments from the email in their Sent folder.

- An email attachment is added as a file in Salesforce. How sales reps access the file in Salesforce depends on whether emails are associated as tasks or email messages. When emails are associated as tasks, logged attachments are available in the Files section of the Salesforce Email page layout. When Enhanced Email is turned on, emails are logged as email objects, and attachments are available in the Attachments section of the Salesforce email.

- For High Velocity Sales users who also use Einstein Activity Capture, the integration adds the **Email to Salesforce Address** as a BCC recipient on emails being composed. That address is automatically generated for a user in their My Email to Salesforce Settings during setup. The BCC address is used to log engagement for High Velocity Sales, and doesn't log the email as a task.

- There are limitations if an object has multiple record types and the New button in the object's related list is overridden. The integration only supports the New button if you skip the record type selection page in the override configuration.

Outlook Integration in Safari on an iPad

- On an iPad, the buttons at the bottom of the Outlook integration pane, such as Save and Cancel, aren't visible when using the Outlook on the web email client in Safari. Sales reps can scroll to use the buttons at the bottom of the pane.

Setting Up Your Microsoft Exchange Server for the Outlook Integration

The Outlook integration runs as a Microsoft Office add-in. Depending on your Exchange server version, the server requires that you set up Exchange Web Services so the server can communicate with Salesforce. Work with your IT professional who maintains your Exchange server to establish a connection with the add-in.

⛔ **Important:** How you configure your Exchange server depends on your company's internal policies. If you have questions about your Exchange server, contact Microsoft Support. Salesforce can assist if Microsoft requires input, but can't engage with Microsoft on your behalf unless you've contacted them first.

Work with your IT professional to ensure that the Exchange server is set up to do the following things. This setup ensures that the Exchange server can communicate with the Outlook integration.

Reach the Salesforce listing in the Microsoft AppSource store (All Versions of Outlook and Exchange)

The add-in is available only from the AppSource store. The Exchange server must be able to authorize calls to and from Business Apps - Microsoft AppSource. Choose whether the Exchange administrator sets up the integration add-in on users' behalf or Outlook users get the add-in from the Store themselves. If users get the add-in themselves, they need access to the store.

Accept incoming Exchange Web Services (EWS) calls from Salesforce

Steps may include:

- Enabling an EWS endpoint (a common practice with on-premises servers)
- Using AutoDiscover (optional)
- If there's a firewall, allowing incoming EWS calls to originate from Salesforce IP addresses and domains (allowlists). Valid calls contain json web tokens (JWT)

Review the following for more information:

- *External Link:* Start using web services in Exchange
- *Knowledge Article:* Salesforce IP Addresses & Domains to Allow
- *External Link:* Autodiscover service in Exchange Server
- *External Link:* Inside the Exchange Identity token

Generate the web tokens that indicate the URL Salesforce uses to connect to the Exchange server

The web tokens contain a MetaData URL. If you use Autodiscover to accept EWS call, the MetaData URL could be same as the Autodiscover URL.

📝 **Note:** A service account is not required for the Outlook integration. If you are also using Lightning Sync to sync calendar events and contacts, you could require a service account depending on your configuration.

💡 **Tip:** To check the Exchange server connection and confirm that it's configured properly to communicate with the add-in, use the Salesforce Debug Tool.

Set Up the Outlook Integration Without Public Exchange Web Services (Pilot)

If you meet the following criteria, Exchange server configuration isn't required to set up the Outlook integration. However, a local EWS connection is still required between Outlook and Exchange.

- Your Outlook versions and Exchange server support JavaScript API v1.8 or later. To determine which API version is available in each Outlook application, see the Microsoft Documentation about the JavaScript API.

- You don't have an Inbox license.

If you meet these requirements, contact your Salesforce account representative for more details.

> **Note:** The add-in is available only from the AppSource store, and each Outlook user needs the add-in to use its features. Even without public Exchange Web Services set up, the Exchange server must be able to authorize calls to and from Business Apps - Microsoft AppSource. Choose whether the Exchange administrator sets up the integration add-in on users' behalf or Outlook users get the add-in from the Store themselves. If users get the add-in themselves, they need access to the store.

Turn On the Outlook Integration in Salesforce

Turn on the Outlook integration so your sales reps can access Salesforce in Microsoft® Outlook®.

1. From Setup, in the Quick Find box, enter `Outlook`, and then select **Outlook Integration and Sync**.

2. Enable **Let users access Salesforce records from Outlook**.

3. If reps use Outlook on the web, in the Microsoft Outlook Web App Domain section, add the domains that you want to allow access to Salesforce.

   If you use 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.

Distributing the Outlook Integration Add-In Using Microsoft Centralized Deployment

To use the Outlook integration, each sales rep needs the Salesforce add-in, which is available from the Microsoft AppSource store. We recommend that you work with your IT department to distribute the add-in using Microsoft Centralized Deployment from the email server. Distributing the add-in is helpful when users don't have the permissions required to install add-ins themselves or when they can't reach the Microsoft AppSource store.

⊘ **Important:** The integration is available only through the Microsoft AppSource store. A local install file isn't available. The add-in includes the base integration experience, and Inbox features are unlocked when a user is configured to use Inbox.

💡 **Tip:** To determine whether Centralized Deployment is the right solution for you, see Determine if Centralized Deployment of add-ins works for your organization in the Microsoft documentation. See the following Microsoft documents based on your server.

- Centralized Deployment for Office add-ins with Office 365
- Centralized Deployment for Office add-ins with Exchange

If your Outlook users can access the Microsoft AppSource store, they can install the Salesforce add-in themselves.

Enable Event Type Selections to Log Events from Outlook or Gmail

Use the Type field on the Event object to provide sales reps a selection list to identify the type of event logged from the Outlook or Gmail integration. If the field is visible, reps can choose from a list of event types to classify the event they're logging. Customize the Type field's picklist values to reflect the types of communications in your business.

1. From the Object Manager in Setup, find the Event object.

2. In Field & Relationships, select **Type**.

3. In Field Information, select **Edit**, set **Field Usage** to Active, and set any other field information required for your configuration.

4. Save the settings.

5. In the Field Information, select **Set Field-Level Security**. Make the field visible to the users and profiles who log events from the integration.

6. Save the settings.

7. In Event Type Picklist Values, add, reorder, or replace the values you want to include as event type selections.

8. Save the picklist values.

As long as the Type field for the Event object is visible, sales reps see the field in the integration when logging events. However, if you choose to make the field required on a page layout, it isn't required when logging events from the integration. The integration doesn't distinguish between user profiles and the page layouts they're assigned for the field.

💡 Tip: The Event object's Type picklist is different than other picklists, which makes it unique when including it in reports. To include the Type field in reports, create a workflow to copy the values from the field to a new custom field on the Event object. You can then add the custom field to your report.

ENHANCED EMAIL AND THE OUTLOOK INTEGRATION

Turn on Enhanced Email in the Outlook integration and Sync setup page 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®.

Considerations for Enhanced Email with the Outlook Integration

Before turning on Enhanced Email with the Outlook integration, 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.

ADD SALESFORCE INBOX FEATURES TO THE OUTLOOK AND GMAIL INTEGRATIONS

Add Salesforce Inbox features to your integration with Microsoft® Outlook® or with Gmail™ to give your reps access to more tools to increase their productivity. You already have the integration enabled. With the addition of an Inbox license, you can easily add Inbox productivity features.

1. From Setup, in the Quick Find box, enter `Integration`, and then select either **Outlook Integration and Sync** or **Gmail Integration and Sync**.

2. Expand **Let users access Salesforce records**.

3. If you use Outlook, make sure that **Email to Salesforce** and **Use Enhanced Email** are enabled.

4. In the Inbox in the Integration section, select **Edit Settings** and enable **Make Inbox Available to Users** in the Salesforce Inbox page.

   You can also access this setting by entering `Inbox` in the Quick Find box in Setup and selecting **Setup Assistant**.

5. In the Salesforce Inbox page, select **Assign Permissions Sets**. Assign the Inbox With Einstein Activity Capture or Inbox Without Einstein Activity Capture permission set to reps who can use Inbox features.

   If your reps use High Velocity Sales, the High Velocity Sales User permission set also includes Inbox features.

6. Return to the Outlook Integration and Sync or Gmail integration and Sync setup page.

7. To change the layout or availability of features in the integration, enable **Customize Content with App Builder**, and select to create an email application pane. Use the Lightning App Builder to customize the pane.

   The email application pane is a Lightning App Builder page that applies to the Salesforce pane in Outlook or Gmail. When you enable Inbox, the default email application pane includes all Inbox productivity features. To include only the features that your reps need, or to change the organization of the features in the pane, create one or more custom panes.

   > 💡 Tip: To start your custom design, use the **With Inbox Features** option in the Email Application Pane section. Then, remove the features that you don't need from the default email application pane.

8. Activate the email application pane, and assign it to the appropriate user profiles.

   Sales reps with an Inbox permission set see the new pane the next time they open the integration in their email.

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

Available with Inbox, which is available for an extra cost in: **Group**, **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 High Velocity Sales, which is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

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USER PERMISSIONS

To assign permission sets to users:
- Assign Permission Sets

To set up 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