
Outlook Integration Implementation Guide

Salesforce, Spring '20



CONTENTS

Outlook Integration	1
Outlook Integration System Requirements	2
Set Up the Integration with Outlook	4
Considerations for Setting Up the Outlook Integration	5
Preparation for Your Microsoft Exchange Server for the Outlook Integration	7
Turn On the Outlook Integration in Salesforce	9
Enable Event Type Selections to Log Events from Outlook	10
Add Salesforce Inbox Features to the Outlook Integration	11
Add the Salesforce Add-In from the Microsoft Exchange Admin Center	12
Get Access to Salesforce in Outlook	13
Give Outlook Access to Salesforce	14

OUTLOOK INTEGRATION

Our 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 Lightning Sync to sync contacts and calendar events between Salesforce and Outlook, and add Einstein Activity Capture to automate email and event logging.


To learn more about other products available, see [Salesforce Help](#). 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	<p>Either:</p> <ul style="list-style-type: none">• Exchange Online with Office 365• Exchange 2019, 2016, or 2013 on-premises <p>In some scenarios, integrating Salesforce with Outlook requires Exchange server configuration and an IT pro who maintains you Exchange server. To learn more, review the Outlook integration setup topics.</p>
Email clients	<p>Either:</p> <ul style="list-style-type: none">• Microsoft Outlook 2019, 2016, or 2013 on Windows PC, most recent stable version recommended• Outlook on the web• Microsoft Outlook for Mac 2019 or 2016 on the most recent stable version of the macOS <p> 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 applying all available security updates from Microsoft.</p> <p>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:</p> <ul style="list-style-type: none">• 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.• 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. <p>For better performance, we recommend turning on Use Cached Exchange Mode in the Outlook Account Settings on the client. When Use Cached Exchange Mode is on, an occasional error could occur more often because an email is temporarily out of sync with the Exchange Server. Learn more.</p>

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**

Outlook Integration System Requirements

What	Requirements
Browser	<p>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.</p> <ul style="list-style-type: none">• 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 <code>https://*.outlook.com</code>, <code>https://*.office365.com</code>, and <code>https://*.office.com</code> and any Outlook URL used for login.• Apple® Safari®, most recent stable version. Turn off Prevent cross-site tracking.• Microsoft Internet Explorer® 11 (Windows only).• Microsoft Edge, most recent stable version (Windows only) <p>If you're using the Outlook integration in a desktop version of Outlook, Microsoft Internet Explorer 11 is required on the desktop computer. You're not required to use Internet Explorer as your default browser.</p>
Security encryption protocol on your email server	TLS 1.1 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 team member must have the Salesforce add-in, available in the Microsoft AppSource store. Your Exchange administrator can push the client application to team members using the Exchange Admin Center. Or, if they have access to the store, team members can get and enable the Salesforce add-in 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. But don't worry. You can turn on the integration and get the Salesforce add-in up and running fast. 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.

 **Note:** The Outlook integration and the ability to sync records with Lightning Sync are often used together. If you're also setting up Lightning Sync, there's other required setup steps.

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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 and Considerations

- 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 and its JavaScript API version, whether your Exchange server is online or on-premises, and the features you need in the integration.
 - If Outlook is running JavaScript API v1.8 or later, you use Exchange Online, and don't use Inbox features, there's no Exchange server configuration required. To determine which API version is available in each Outlook application, see the [Microsoft Documentation about the JavaScript API](#). If you meet this requirement, contact your Salesforce representative for more details.
 - If Outlook is running a JavaScript API v1.7 or earlier, work with your IT pro to prepare and configure your Exchange server.
 - If your Exchange server is on-premises, work with your IT pro to prepare and configure your Exchange server.
 - If you have an Inbox license, work with your IT pro to configure your Exchange server, regardless of the version of Outlook you are running.

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Add-in and Salesforce Setup


- Each sales rep needs the Salesforce add-in within Microsoft Outlook, which is available from the Microsoft AppSource store. Exchange administrators can choose to push the add-in from the Exchange Admin Center. Pushing 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 have access to do so, sales reps 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.
- Salesforce doesn't communicate directly with the Outlook client. The Outlook integration is built on the Office Add-In framework. To log emails to Salesforce, the Office Add-In framework sends calls between the Outlook client and the Exchange server, and then the Exchange server and Salesforce.
- 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 also 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

Considerations for Setting Up the Outlook Integration

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 Feature Configuration

- The Outlook integration includes default email application panes and publisher layouts so that you can get up and running quickly. To include, exclude, or reorder components in the pane, create custom email application panes, and assign them to specific user profiles. Configure the publisher layout to give users access, or deny access, to certain global quick actions within the integration.
- 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.
- 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.


 **Note:** If Outlook is running JavaScript API v1.8 or later and your Exchange server is on-premises and you haven't done any additional server-side setup, logging attachments from an email to Salesforce isn't supported. Add any email attachments directly to the record in Salesforce.

Inbox Productivity Features

- To provide more features when composing emails, add Inbox features to the Outlook integration. Access to Inbox features requires a purchased Inbox license. An Inbox license is available with High Velocity Sales, Sales Cloud Einstein, and as a standalone license.
- The Salesforce add-in for Outlook available in the Microsoft AppSource store includes Inbox features, which are unlocked with an Inbox license. Sales reps don't install a different add-in.
- To enable Inbox features, turn on **Make Inbox Available to Users** on the Salesforce Inbox page in Salesforce Setup.
- To configure Inbox features in the new integration, use the Outlook Integration and Sync page in Salesforce Setup.
- To remove features such as email tracking from the Outlook integration, remove the components from the email application panes using the Lightning App Builder.
- Text shortcuts allow reps to save small phrases that they use most often to easily add them to an email. Text shortcuts are saved and available only for the rep who creates them. Use email templates for larger portions or text, or text that you want to make available to multiple reps.

PREPARATION FOR YOUR MICROSOFT EXCHANGE SERVER FOR THE OUTLOOK INTEGRATION

The Outlook integration runs as a Microsoft Office add-in. In some scenarios, the Exchange server requires setup so that it 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 Exchange configuration questions, 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.

If you meet the following criteria, no Exchange server configuration is required to set up the Outlook integration. Contact your Salesforce representative for more details.

- Your Outlook version runs JavaScript API v1.8 or later.
- Your Exchange server is online, and not on-premises.
- You don't have an Inbox license.

Exchange server configuration is required in the following scenarios. Work with your IT professional to ensure that the Exchange server can do all the things described in this topic.

- Your Outlook version runs JavaScript API v1.7 or earlier.
- Your Exchange server is on-premises.
- You have an Inbox license.

To determine which API version is available in each Outlook application, see the [Microsoft Documentation about the JavaScript API](#).

To communicate with the Outlook integration, make sure that your Exchange server can do the following:

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 sales reps' behalf or sales reps get the add-in from the Store themselves. If your reps get the add-in themselves, they need access to the store.

Accept incoming Exchange Web Services (EWS) calls from Salesforce

 **Note:** This configuration isn't required if you're running Outlook versions that use the JavaScript API v1.8 and Exchange Online.

Options include:

- Enabling an EWS endpoint (a common practice with on-premises servers)
- Whitelisting incoming EWS calls to originate from Salesforce IP addresses and domains
- Using AutoDiscover
- Validating calls to ensure that they contain valid json web tokens (JWT).

Review the following for more information:

- *Knowledge Article:* [Salesforce IP Addresses & Domains to Whitelist](#)
- *External Link:* [Autodiscover service in Exchange Server](#)
- *External Link:* [Inside the Exchange Identity token](#)

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Preparation for Your Microsoft Exchange Server for the Outlook Integration

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

 **Note:** This configuration isn't required if you're running Outlook versions that use the JavaScript API v1.8 and Exchange Online.

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.

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](#).

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. 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.

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USER PERMISSIONS

To enable the Outlook Integration

- Customize Application

ENABLE EVENT TYPE SELECTIONS TO LOG EVENTS FROM OUTLOOK

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 integration.

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.



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.

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USER PERMISSIONS

To view field accessibility:

- View Setup and Configuration


To change field accessibility:

- Customize Application
AND
Manage Profiles and Permission Sets

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.

 **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.

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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

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


ADD THE SALESFORCE ADD-IN FROM THE MICROSOFT EXCHANGE ADMIN CENTER

Before your sales teams can experience Salesforce in Microsoft® Outlook®, your team members need access to Salesforce from within Outlook. Team members can get and enable the Salesforce 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 Salesforce in Outlook simultaneously.

 **Tip:** To authorize Outlook users to add Office add-ins, make sure that they have the right permissions. For more information, review this [Microsoft article](#).


To provision Salesforce in Outlook for your team, work with your Exchange administrator to complete these steps from the Exchange Admin Center.

 **Tip:** The add-in automatically updates with each Salesforce release. There's no need to push a new version when a new Salesforce release is available.


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**.
4. 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 *Salesforce* in the **Search** box and select **Salesforce** from the search results.
6. To confirm that you want to get the Salesforce add-in, click **Add**

 **Important:** To avoid errors at this step, make sure that your Exchange server can connect to the 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 Salesforce add-in.
 - **Optional, enabled by default**
 - **Optional, disabled by default**
 - **Mandatory, always enabled. Users can't disable this add-in.**

 **Note:** To enable the Salesforce add-in for a subset of your reps, you can use PowerShell™ commands. For more information, review the [Microsoft Exchange Mailbox cmdlets article](#).

To make the Outlook integration available to your sales teams, complete the steps to enable and set up the integration in Salesforce.

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USER PERMISSIONS

To enable the Outlook integration on behalf of users

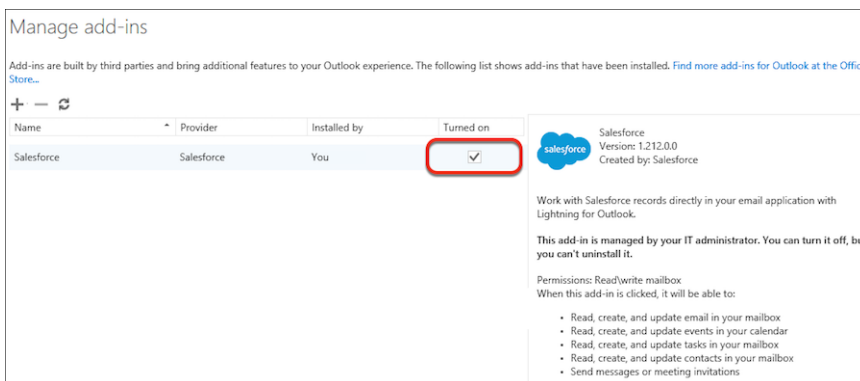
- Administrative access to your company's Exchange Admin Center

GET ACCESS TO SALESFORCE IN OUTLOOK


To start using the integration with Microsoft® Outlook®, get the Salesforce application from the Microsoft AppSource store and connect your email account. Review the system requirements to make sure that you're running a supported version of Outlook.

 **Note:** These instructions could differ based on your version of Outlook.

1. In Outlook, click Add-ins and download Salesforce from the store.
If you don't have access to the 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**.



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.

 **Tip:** 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.

EDITIONS

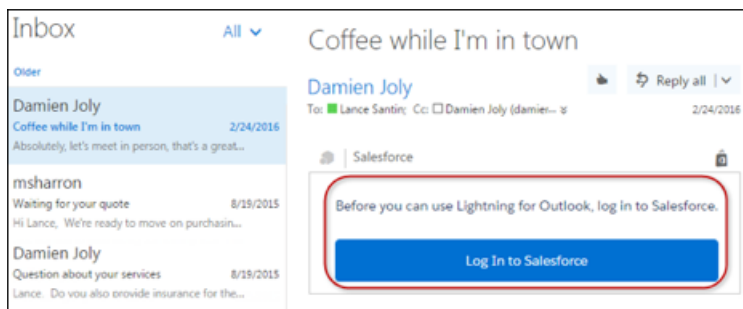
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GIVE OUTLOOK ACCESS TO SALESFORCE

To view and work with Salesforce data in Microsoft® Outlook®, and to relate emails to Salesforce records, reps must give Outlook access to Salesforce.

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



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

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