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# Sales Productivity

Salesforce, Winter '26

## Winter '26





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# SALES PRODUCTIVITY

Salesforce offers a ton of features to increase sales productivity.

 **Note:** For usage restrictions that apply to this product, see [this document](#).

## [Einstein Conversation Insights](#)

Give sales teams insights about their customer calls and surface coachable moments. Managers and reps can play recordings of conversations to gain visibility into mentions of competitors, products, custom keywords, pricing discussions, and next steps. Sales leaders can extract conversation trends and visualize insights related to voice and video calls.

## [Sales Cloud Everywhere](#)

The Salesforce Chrome extension in Sales Cloud lets you work with your To Do List, see engagement alerts, create and update records, and more, without leaving the web page you're on.

## [Sales Engagement](#)

Accelerate your inside sales process with a high-productivity workspace. With cadences, managers can create custom sales processes that guide sales reps through handling different types of prospects. Those cadences appear for sales reps in the Work Queue, a task list that appears inside the Sales Console. And with other productivity-boosting features like Sales Dialer, Lead Scoring, and included reports, your sales teams have everything they need to handle prospects in a fraction of the time it took before.

## [Relationship Selling](#)

Close deals faster by focusing on the relationships between contacts on your opportunities and accounts. Visualize your contacts in a relationship map and let Einstein generative AI add buyer profile data to your contacts automatically.

## [Salesforce Meetings](#)

Salesforce Meetings is a set of tools to enhance sales reps' interactions with prospects and customers. Reps can ensure everyone is aligned before a meeting starts by seeing valuable meeting information with Meeting Digest.

## [Integration with Microsoft Teams](#)

Integrate Salesforce with Microsoft Teams to bring Salesforce data directly to Teams users on their desktop and mobile devices. Teams participants can mention Salesforce records directly in chats or channels in Teams to provide information about a contact, lead, opportunity, account, or case. Teams channel members with Salesforce access can view more record details without leaving Teams.

## [Email and Calendar Integrations](#)

You spend tons of time working prospects from your email and scheduling appointments from your calendar. After Salesforce admins set up these integration products, you can get your Salesforce work done directly from your Microsoft or Google applications such as Outlook, Gmail, and Google Calendar.

## [Use Email to Salesforce to Relate Emails to Records](#)

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.

## [Work With Salesforce's Email in Sales Cloud](#)

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

## Sales Productivity

### [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.

### [Sales Dialer](#)

Use Sales 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. Articles come from reputable, English-language news sources.

### [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.

### [Learn More About Social Intelligence Module](#)

The Social Intelligence Module (SIM) is a Salesforce package that runs inside Sales Cloud. SIM provides enhanced account-based listening and social selling strategies. With SIM, you can see information that is actionable and based on definable topics.

### [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.

### [Video Conferencing](#)

Let your sales reps use video conferencing to connect with customers remotely.

## Einstein Conversation Insights

Give sales teams insights about their customer calls and surface coachable moments. Managers and reps can play recordings of conversations to gain visibility into mentions of competitors, products, custom keywords, pricing discussions, and next steps. Sales leaders can extract conversation trends and visualize insights related to voice and video calls.

 **Note:** To learn more about this feature in Trailhead, check out the [Einstein Conversation Insights](#) module.

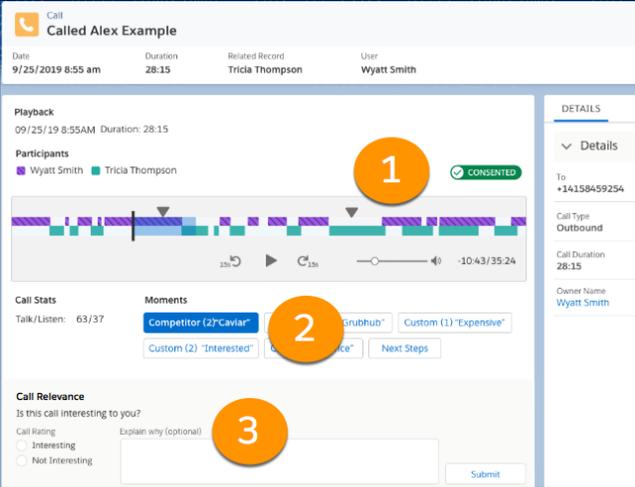
Einstein Conversation Insights is a feature available for sales and service users that offers the ability to see insights and trends surfaced from voice and video calls. Calls are recorded and analyzed for mentions of specific keywords, phrases, and points of interest. Reps and managers can review the call transcript, or see areas that need attention or follow-ups from the Action Items tab.

### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise**, **Performance**, and **Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users



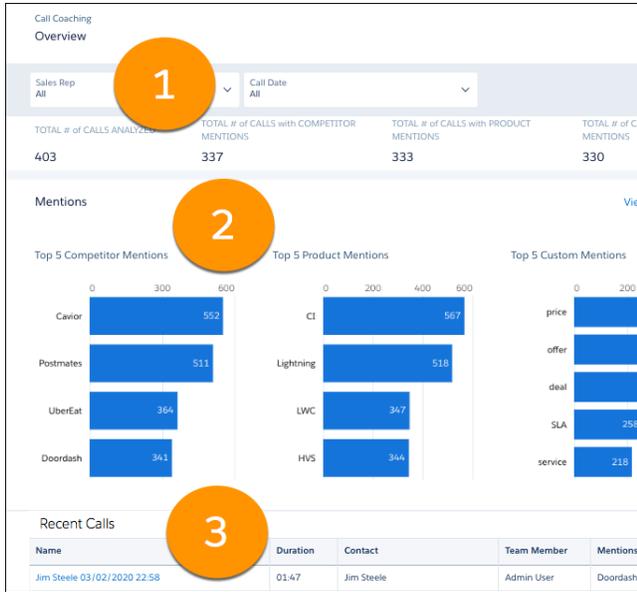
The screenshot displays the Einstein Conversation Insights interface for a call titled "Called Alex Example". The interface is divided into several sections:

- Call Header:** Shows the call title, date (9/25/2019 8:55 am), duration (28:15), related record (Tricia Thompson), and user (Wyatt Smith).
- Playback:** A timeline showing the call duration (09/25/19 8:55AM) and duration (28:15). It includes a progress bar and a play button. A red circle with the number "1" highlights the playback controls.
- Participants:** Lists the participants: Wyatt Smith (purple) and Tricia Thompson (green). A green "CONSENTED" status is shown.
- Call Stats:** Shows Talk/Listen: 63/37.
- Moments:** A section showing key moments from the call, such as "Competitor (2) Caviar", "Grubhub", "Custom (1) Expensive", "Custom (2) Interested", and "Next Steps". A red circle with the number "2" highlights this section.
- Call Relevance:** A section asking "Is this call interesting to you?" with radio buttons for "Interesting" and "Not Interesting", and a text box for "Explain why (optional)". A red circle with the number "3" highlights this section.
- DETAILS:** A sidebar on the right showing call details like "To: +14158459254", "Call Type: Outbound", "Call Duration: 28:15", and "Owner Name: Wyatt Smith".

From voice and video call records, managers can play call recordings and see call details, including the talk-to-listen ratio. The different colors show the participants on the call. Jump to different mentions in the call from the player (1). Click different mentions (2) to highlight and jump to specific areas of the call.

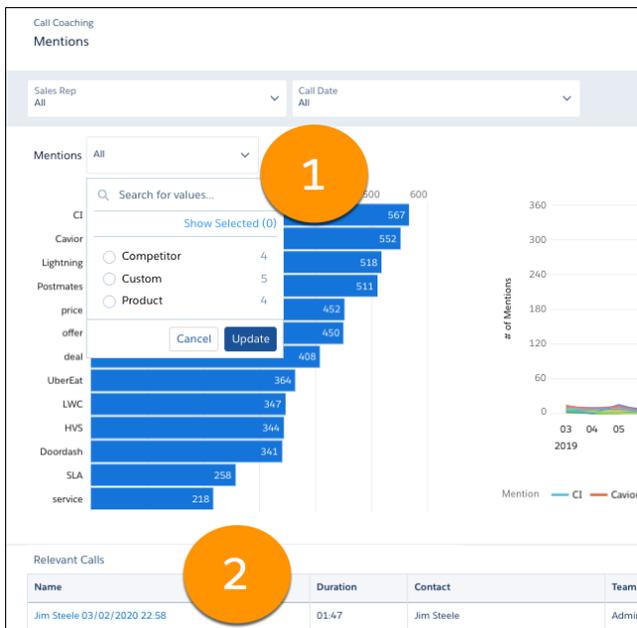
Managers can also add feedback (3) to help us surface the most relevant calls in the daily highlights email. This feedback goes to our system, not the sales or service rep on the call.

Managers can also see reports and dashboards about different insights.



From the Overview page, managers can filter by rep and call date (1), and review reports of top mentions based on role hierarchy (2). The Overview page also features links to recordings in the Recent Calls table (3). These recordings are the calls most recently made by your team.

Managers can see more details on the Mentions page.



Filter by the type of mention and see relevant reports (1). This page also features a list of Relevant Calls (2) based on your filter criteria. Einstein Conversation Insights comes with a number of automatic insights for sales and service users. Although Einstein Conversation Insights can be used with Service Cloud, Einstein Conversation Insights is optimized for sales conversations and many features are limited to sales use cases.

**Table 1: Automatic Insights for Sales**

Insight Type	Description
Next Steps	Follow-up, scheduling, and action items mentioned in calls
Pricing Mentioned	Quotes, cost, payment, and purchase orders mentioned in calls
Challenges	Issues such as time, additional approval, or other challenge-related phrases
Trending	Recent words or phrases that appear in a significant pattern across calls
Longest Monologue	The longest employee talk time relative to the call
Longest Customer Story	Customer's longest turn speaking in a call
Question	Questions asked during calls
Objection - Budget	Objection related to price
Objection - Authority	Objection calling for input from someone else
Objection - Need	Objection related to a lack of interest or need
Objection - Timing	Objection indicating that the timing isn't right

**Table 2: Automatic Insights for Service**

Insight Type	Description
Trending	Recent words or phrases that appear in a significant pattern across calls
Escalation	Request to talk to a supervisor made in calls
Attrition Risk	Service cancellation, unsubscription, or refunds mentioned in calls
Payments	Pricing, quotes, delivery fees, or invoicing mentioned in calls
Longest Monologue	The longest employee talk time relative to the call
Longest Customer Story	Customer's longest turn speaking in a call
Question	Questions asked during calls

Einstein Conversation Insights users can also receive daily emails with a list of highlighted calls if there were at least 3 calls with insights in the previous day.

 **Note:** Some Einstein Conversation Insights features, such as Salesforce Inbox, require users to connect a Microsoft® Exchange or Gmail™ account to Salesforce.

#### [Recording Providers](#)

Connect voice and video recording providers to begin importing calls into Einstein Conversation Insights.

### [Optimal Speaker Separation](#)

Optimal Speaker Separation helps with the creation of transcripts and call insights, so we recommend that orgs enable the feature to get the most out of Einstein Conversation Insights.

### [Call Summaries Powered by Einstein Generative AI](#)

Einstein Conversation Insights users can create generative call summaries on voice and video calls. Powered by Einstein, the new Summary tab on call records allows users to create editable summaries that include next steps and customer feedback, and share summaries for easier team collaborations in the flow of work.

### [Call Explorer Powered by Einstein Generative AI](#)

Einstein Conversation Insights users can ask questions directly from voice and video call records. Powered by Einstein, the new Call Explorer allows users to quickly gather information about a call, such as product mentions or outstanding customer questions.

### [Sales Signals Powered by Einstein Generative AI](#)

Einstein Conversation Insights users can see the topics that matter most to customers. Users can filter topics by category and keyword to see a dashboard of relevant signals and conversations. These conversations are based on products or competitors you identified while setting up ECI. Drill into each topic for more details, so that you and your team can identify any obstacles or opportunities.

### [Generative Conversation Insights Powered by Einstein Generative AI](#)

Einstein Conversation Insights users can create custom insights for their video calls. Admins can define prompts that query a large language model (LLM) with the transcript of the call, and show relevant insights on the call record. Using generative AI, get answers to things such as customer sentiment or deal terms surfaced for sales conversations automatically.

### [Related Records for Voice and Video Calls](#)

The Related Record field on voice and video calls links useful information between calls and relevant records. This field is often populated when a call is first processed, and can be manually updated later. With the Related Record Matching feature, calls can be matched to related records automatically.

### [Set Up Einstein Conversation Insights](#)

Use the Setup menu to get the guidance you need for setting up Einstein Conversation Insights. Connect a recording provider, assign permission sets, and define insights to use Einstein Conversation Insights. After the setup process is complete on the org and user levels, calls are processed automatically, and call data can be found on voice and video record pages.

### [Integrate Voice Connectors with Einstein Conversation Insights](#)

If your sales or service teams are using Dialpad, RingCentral, Aircall, or Amazon Connect, you can connect their customer conversations with Einstein Conversation Insights (ECI) to get transcripts, insights, next steps, and more ECI features.

#### SEE ALSO:

[Compare Einstein Conversation Insights for Sales and Service](#)

[Set Up Einstein Conversation Insights](#)

[Sales Engagement](#)

## Recording Providers

Connect voice and video recording providers to begin importing calls into Einstein Conversation Insights.

By connecting a recording provider, you're granting Salesforce permission to store and analyze sales recordings from this source. It's your responsibility to make sure you're complying with the recording laws in the places where your organization does business.

 **Note:** Salesforce employees may access and review this data, including recorded calls, for the purposes of improving and training the product.

Connecting also shares the email addresses of Salesforce users with this recording provider to match recorded calls with users.

Einstein Conversation Insights supports Google Meet, Microsoft Teams, and Zoom Meetings for video calls. These voice recording providers are supported.

- Sales Dialer
- Service Cloud Voice with Amazon Connect
- Service Cloud Voice with Partner Telephony
- Service Cloud Voice with Partner Telephony from Amazon Connect
- Dialpad, RingCentral, Aircall, and Amazon Connect

There are additional setup steps and requirements to connect these providers. For more information, see [Integrate Voice Connectors with Einstein Conversation Insights](#).

The following partners are also supported: CloudTalk, Fastcall, Natterbox, PhoneIQ, Redbox, and Tenfold. Reach out to these telephony providers about using their product with Einstein Conversation Insights.

 **Note:** To use other recording providers, inquire about implementing an API solution to connect your provider. More information can be found in [Einstein Conversation Insights API Setup for Recording Providers](#).

For more information about the types of information that can't be imported, see our [Trust and Compliance](#) site.

For information about adding Zoom as a video recording provider, see [Set Up Zoom Integration](#). Zoom Phone is not supported out of the box.

For users to see their processed calls, the email address of the connected video account needs to match the email address used to log into Salesforce.

### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise**, **Performance**, and **Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

## Optimal Speaker Separation

Optimal Speaker Separation helps with the creation of transcripts and call insights, so we recommend that orgs enable the feature to get the most out of Einstein Conversation Insights.

Most video and voice call providers identify speakers on the call. However, in cases where this information isn't identified or shared, the Optimal Speaker Separation feature is used to help in the creation of transcripts and call insights. This includes non-English calls, video calls where the transcript is not shared, and voice mono calls (those that only use one channel for transmission).

Many Einstein Conversation Insights features rely on the availability of separate speaker tracks, so we recommend that all users enable the feature. If a user opts out from Optimal Speaker Separation and makes a call that would otherwise use the feature, then some call insights are still available, but no transcript or actions items are generated.

Acoustic data used for speaker separation is private and is not tracked or used for purposes other than speaker separation in features that require it. Speakers are separated but they are not identified. After we process calls for transcription, conversation insights, action items, and coaching recommendations relevant to your teams:

- We delete the acoustic features that are used to separate speakers from our system.
- The data is not retained after an individual call is processed.
- Speaker data is not shared with third parties.
- The insights generated are private to your org.

## Call Summaries Powered by Einstein Generative AI

Einstein Conversation Insights users can create generative call summaries on voice and video calls. Powered by Einstein, the new Summary tab on call records allows users to create editable summaries that include next steps and customer feedback, and share summaries for easier team collaborations in the flow of work.

### Available in: Lightning Experience

Available in **Enterprise, Performance**, and **Unlimited** Editions with the Einstein for Sales add-on and Einstein Conversation Insights.

This feature is available to users with the Einstein Sales Call Summaries permission set and access to a voice or video call record. Users without the permission set can see and copy summary data if they have access to the record, but they can't create or edit call summaries.

Use the Summary tab to create and access call summaries.

### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise, Performance**, and **Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

The screenshot shows the Salesforce interface for a video call titled "TrailTech Discussion". At the top, there's a navigation bar with "Sales" and various tabs like "Home", "Work Queue", "Cadences", "Opportunities", "Conversation Insights", "Leads", "Tasks", "Files", "Accounts", "Contacts", "Video Calls", and "More". Below the navigation, the call details are shown: "Call Started: 9/7/2023, 10:21 AM", "Call Duration: 00:35:24", "Language: English", "Call Type: Google Meet", "Related Record: Adventure for Life", and "Owner Name: Alex Zhang".

The main content area is divided into two sections. On the left, "Meeting Playback" includes a video player showing two participants, Gabriela Silva and Alex Zhang, smiling. To the left of the video is a list of "Participants" (Customer: Adventure for Life, Gabriela Silva; Internal Reps: Northern Trail, Alex Zhang) and "Insights" (Automatic Insights: Questions (2), Pricing (2), Next Steps (3), Challenges (1); Objections: Budget (1), Authority (1); Competitors: Peak Systems (3)).

On the right, the "Call Summary" section is titled "Einstein" and "Created by Einstein". It contains a "Customer Impression" (The customer seemed satisfied with the call and appreciated the assistance provided by the seller. They expressed gratitude and ended the call on a positive note.) and a "Call Summary" (During the call, Alex Zhang from Northern Trail presented the benefits of TrailTech, highlighting its features, customization options, and automation capabilities, while also acknowledging Peak Systems' advantage in coaching. Both parties discussed the potential benefits of TrailTech for Adventure for Life's sales operations. Gabriela Silva was particularly interested in feature gap comparison between TrailTech and Peak Systems to make an informed decision for her company.) Below the summary is a "Next Steps" section with one item: "Customer to review the information provided and discuss with the team". There are also "Like" and "Dislike" buttons, an "Edit" button, and a "Copy to Clipboard" button.

A standard call summary includes the summary itself, the customer impression, and any next steps. Click **Create Call Summary** to create a summary for a voice or video call.

The screenshot shows a dialog box titled "Summary" with tabs for "Summary", "Transcript", "Action Items", "Chatter", and "More". At the top left is the "Einstein" logo. To the right is a button labeled "Create Call Summary". Below the button is a circular illustration of a cartoon character with a white beard and a brown suit, standing in a forest with tall green trees and a blue sky. Below the illustration, the text reads: "Want to see key highlights from the call? Create a summary for this call using Einstein. This tool uses generative AI, which can produce inaccurate or harmful responses. [Learn more](#)".

Click the edit button to update the content in a call summary.

**Meeting**  
2 min ago | Today  
Created by Einstein

**Customer Feedback**  
The customer seemed satisfied with the call and appreciated the assistance provided by the seller. They expressed gratitude and ended the call on a positive note.

**Call Summary**  
During the call, Sam Rhodes from Salesforce presented the benefits of Salesforce Unlimited, highlighting its features, customization options, and automation capabilities, while also acknowledging Microsoft's advantage in coaching. Both parties discussed the potential benefits of Salesforce Unlimited for Adventure for Life's sales operations.

**Next Steps**

- Customer to review the information provided and discuss with the team
- Finalize decision on plan options
- Follow-up meeting scheduled for August 7th.

Cancel Save

Users can see the calls and summaries related to a record with the Call Summaries Related List Lightning component. This component shows summaries for voice and video calls related to that specific record, using the same matching logic as the activity timeline.

**Opportunity**  
**Adventure for Life**

Account Name	Close Date	Amount	Opportunity Owner
Adventure for Life	5/20/23	\$230,000.00	Sam Rhodes

Details **Related**

**Call Summaries (12)**

**Meeting with Lauren Bailey** 2 min ago | Today  
**Purpose**  
This call was to discuss the product features of Trail Trekker and identify any gaps with Alpine Adventure, which the client uses currently, in hopes of potentially migrating to Trail Trekker ....  
[Expand](#)

**Pricing Questions** 10:00am | 5/3/23

Call summaries are currently limited to calls that include a transcript in English, French, German, Italian, Japanese, or Spanish. Summaries are sometimes not generated for lengthy calls.

## Call Explorer Powered by Einstein Generative AI

Einstein Conversation Insights users can ask questions directly from voice and video call records. Powered by Einstein, the new Call Explorer allows users to quickly gather information about a call, such as product mentions or outstanding customer questions.

**Available in: Lightning Experience**

Available in **Enterprise, Performance,** and **Unlimited** Editions with the Einstein for Sales add-on and Einstein Conversation Insights.

This feature is available to users with the Einstein Sales Call Explorer permission set and access to a voice or video call record.

To bring up Call Explorer, use the **Explore Conversation** button.

The screenshot displays the Einstein Call Explorer interface for a video call titled "TrailTech Discussion". The interface includes a video player showing two participants, a sidebar with call details (Call Started: 9/7/2023, 10:21 AM; Call Duration: 00:35:24; Language: English; Call Type: Google Meet; Related Record: Adventure for Life; Owner Name: Alex Zhang), and a list of insights categorized by Automatic Insights, Objections, and Competitors. A pop-up window titled "Explore: TrailTech Discussion" is open, displaying an AI-generated answer to the question "Why was Peak Systems mentioned?". The answer states: "In the conversation between Alex Zhang and Gabriella Silva, Peak Systems was mentioned because Gabriella brought it up. She mentioned Peak Systems as a competitor and highlighted some of its impressive features, such as coaching tools, sharing capabilities, and accessibility features. This comparison was made to understand how TrailTech, the product Alex represents, stacks up against Peak Systems in these key areas." The pop-up also includes a search bar and navigation controls.

Enter questions related to the call, and Einstein provides an answer.

Call Explorer delivers one answer per query. Previous questions and answers are not stored. Call Explorer is currently supported for calls in English, French, German, Italian, Japanese, and Spanish.

Call Explorer is also available in Einstein Copilot as a standard action. For more information, see [Einstein Copilot Actions](#).

## Sales Signals Powered by Einstein Generative AI

Einstein Conversation Insights users can see the topics that matter most to customers. Users can filter topics by category and keyword to see a dashboard of relevant signals and conversations. These conversations are based on products or competitors you identified while setting up ECI. Drill into each topic for more details, so that you and your team can identify any obstacles or opportunities.

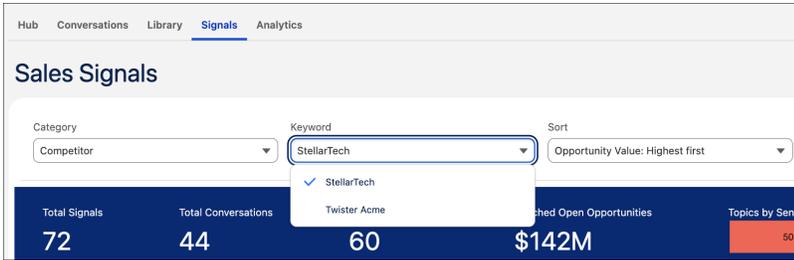
**Available in: Lightning Experience**

Available in **Enterprise, Performance,** and **Unlimited** Editions with the Einstein for Sales add-on, Data Cloud, and Einstein Conversation Insights.

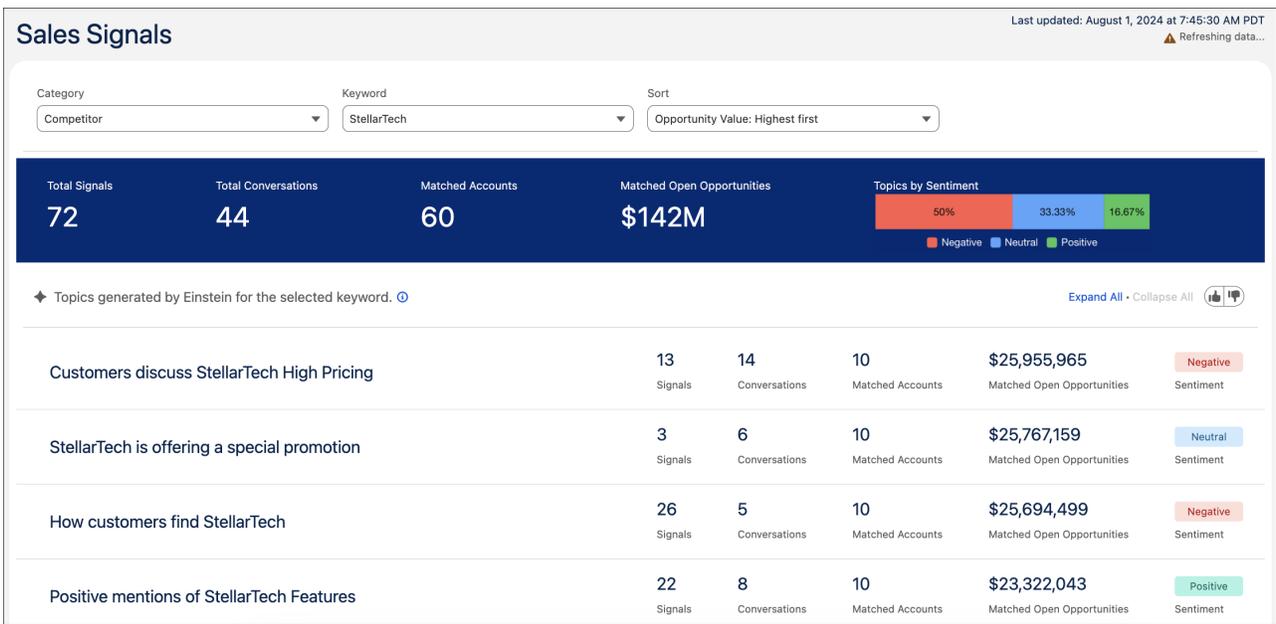
Sales Signals is available to users with the Einstein Sales Signals permission set. Access to Einstein Conversation Insights is not required to see topics, but voice and video record access is required to see topic details.

To bring up Sales Signals, select the **Signals** tab in the Conversation Insights app.

Select a category (Product or Competitor) and a keyword to show a dashboard of relevant conversations about the keyword.

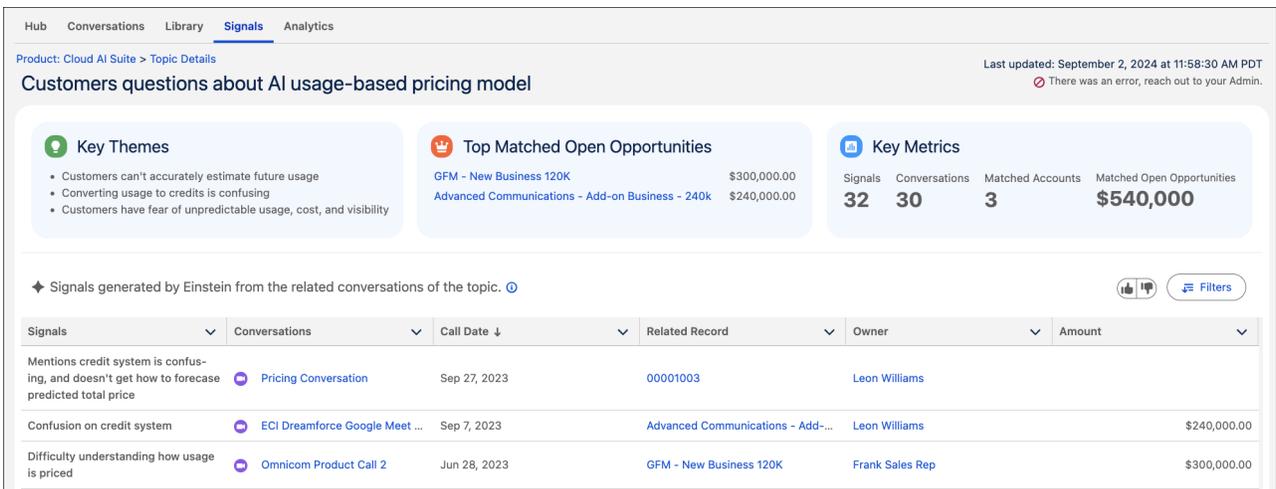


Conversations are sorted by topic across different cards, and relevant metrics are shown for each topic. Topics are sorted based on the highest opportunity value by default. Users can also sort by sentiment, total signals, and other criteria.



See information about topic signals, related opportunity value, and sentiment. Sales Signals users can also see high-level details about topics.

Users can also select topics to get additional details and information. To see more related information, click **View Details** on a topic.



Admins can refresh conversation data 7 days after the last update.

Turn on the feature from the Einstein for Sales page in Setup.

The screenshot shows the Salesforce Setup interface for Einstein for Sales. The main content area is titled "Set Up Sales Signals" and contains several sections:

- Set Up Data Cloud:** Includes a "Go to Data Cloud Setup" button. Below it, instructions state to turn on the Data Cloud connector and mirror ECI data. The status is "Data Cloud Readiness: Ready to Use".
- Connect Sales Signals to Data Cloud:** Includes an "Enabled" toggle switch. Below it, instructions state to connect to Data Cloud to send conversation data. The status is "Data Cloud Connection: Data Cloud is connected".
- Turn on Sales Signals:** Includes an "Enabled" toggle switch. Below it, instructions state to surface relevant customer conversations. The status is "Sales Signals Readiness: Ready to Use".
- Refresh Conversation Data:** Includes a "Refresh Conversation Data" button. Below it, instructions state to refresh data to get current information. The status is "Refresh Status: Data Refreshed" and "Last refresh ran successfully on October 1, 2024 at 12:00:00 AM PDT".
- Select Who Can Use Sales Signals:** Includes an "Assign Permission Sets" button. Below it, instructions state to give users access to Sales Signals.

Data Cloud must be set up prior to using Sales Signals. Connecting Sales Signals starts a Data Cloud sync process of transcript and insight data from up to six months back, and ensures this data is captured moving forward. This operation incurs Data Cloud usage costs.

Refresh conversation data to run recent ECI data in Data Cloud through the Sales Signals pipeline to generate the Signals dashboard.

## Generative Conversation Insights Powered by Einstein Generative AI

Einstein Conversation Insights users can create custom insights for their video calls. Admins can define prompts that query a large language model (LLM) with the transcript of the call, and show relevant insights on the call record. Using generative AI, get answers to things such as customer sentiment or deal terms surfaced for sales conversations automatically.

### Available in: Lightning Experience

Available in **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Sales add-on and Einstein Conversation Insights.

This feature applies to all video calls recorded by users with the Einstein Sales Generative Insights permission set.

Users without the permission set can see generative insights for calls they have access to, but their video calls aren't processed for generative insights.

To bring up Generative Conversation Insights, select the tab. See the insights available on each call.

The screenshot displays the Einstein Conversation Insights interface. At the top, there are buttons for 'Edit', 'Sharing', and 'Add to Collection'. Below this, the 'Owner Name' is listed as 'Kevin Harris'. The main content area is divided into two columns. The left column shows a video call with two participants, a 'Follow up' button, and a call progress bar at the bottom. The right column, titled 'Generative Insights', contains three insights:

- What were the deal terms on this call?** During the call, the deal terms under deliberation encompassed a comprehensive range of aspects. These included intricate discussions on pricing structures, outlining clear payment milestones to facilitate a smooth financial progression, and delineating the specific contractual obligations each party would undertake. The aim was to meticulously craft an agree... [More](#)
- What was the customer sentiment on this call?** Throughout the call, the customer sentiment was distinctly positive. The client conveyed a sense of satisfaction and appreciation, particularly in response to the proposed solutions and strategies discussed, a genuine interest in the potential collaboration and a belief in the value that could be derived from the partnership. Overall, the atmosphere was constructive and optimistic, laying a solid foundation for future interactions. The client was... [More](#)
- Will this deal close in this quarter?** While it's always challenging to predict with certainty, the discussions and the shared enthusiasm suggest a promising outlook for closing the deal within this quarter. Both sides have

Each insight is attributed to 'Created by Einstein' and includes a 'More' link and a 'Created by Einstein' label.

Turn on the feature from the Einstein for Sales page in Setup.

To create a generative insight, from Setup, in the Quick Find box, enter *Call Insights*, and then select **Call Insights**.

Select **Configure Insight**, and then click **Generative Insight** and follow the steps listed.

The 'Configure Insight' dialog box is shown. It has a title bar 'Configure Insight' and a section 'Select an insight type'. There are two options:

- Keyword Insight**: Track specific keywords and mentions in conversations.
- Generative Insight**: Track conversation themes and topics with generative AI.

The 'Generative Insight' option is selected. Below this, there is an information icon and a note: 'Generative insights apply to all recorded video calls of Einstein Conversation Insights users with access to Generative Conversation Insights permissions.' Underneath, there is a section 'Select a language' with the text 'This insight applies only to calls in the selected language:' and a dropdown menu labeled 'Select an Option'. At the bottom, there are 'Cancel' and 'Next' buttons.

We recommend testing each insight in Call Explorer before activation. You're limited to 5 active generative insights.

## Related Records for Voice and Video Calls

The Related Record field on voice and video calls links useful information between calls and relevant records. This field is often populated when a call is first processed, and can be manually updated later. With the Related Record Matching feature, calls can be matched to related records automatically.

Voice and video calls are matched at an overall record level using the Related Record field. Individual participants on calls are also matched to existing records based on meeting data.

### Related Record Matching

With the Einstein Conversation Insights (ECI) Related Record Matching setting enabled, ECI uses participant details to try to find a corresponding opportunity or account record. The setting looks at call owner details, contacts, and email addresses to match a related record.

The related opportunity or account is matched to the Related Record field in the following order:

- Contact >> Opportunity Contact Role >> Opportunity
- Contact >> Account >> Opportunity
- Email Address >> Account >> Opportunity
- Contact >> Account
- Email Address >> Account

The email domains from email addresses are related to accounts via the website field listed on account records.

For custom logic, this field also supports flow builder to set up any preferred matching if Related Record Matching is turned off.

### Participant Matching

We try to match each individual participant on a call with a record (user, contact, or lead) based on meeting data, such as a phone number, email, or name. Once matched, call and insight data will show in the activity timelines for all related participant records.

 **Note:** When a video provider does not provide an email (such as when a user joins a meeting without being logged in), we are only provided the name that the user entered and won't be able to match the participant to a record.

However, if [Einstein Activity Capture and calendar sync](#) is enabled, we will also attempt to match this participant using calendar invites. If an email on the invite corresponds to a record, then a participant name can be matched to that record even if the participant joined the meeting as a guest.

Use the Related Record field to link calls to other related records, like account or opportunities. Linked records can display conversation data, including insights and call transcript snippets, from the activity timeline of related records.

 **Note:** Call data also appears in the activity timeline separately for call participants, such as users, contacts, and leads. This applies even if these records are not listed in the call records' Related Record field.

If Related Record Matching is enabled, Salesforce attempts to match to related opportunities or accounts automatically. Users can filter Conversation Insights dashboards by opportunity stage and amount to see the data that matters most.

Salesforce attempts to populate the field when a call is first processed, though users with record access can manually update the field later. Salesforce also attempts to find a match 7 days after the call was created, in the event that a new related record is found or when the related record field is empty. The way records are matched is different for voice and video calls.

#### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise**, **Performance**, and **Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

**Table 3: Related Record Matching for Voice and Video Calls**

	<b>Supported Objects</b>	<b>Matching Details</b>	<b>Related Record Matching Required to Auto-Match Related Record?</b>
<b>Voice call</b>	Accounts, Cases, Contacts, Leads, Opportunities, and custom objects	Call participant matches are based on the phone number listed on existing records.  If multiple records have the same phone number, one is chosen at random.	No, but opportunities aren't matched without it.  The user placing the call needs access to the related opportunity for it to be matched.  Opportunity matching supersedes other matches.
<b>Video call</b>	Accounts, Cases, Contacts, Leads, Opportunities, and custom objects	Call participant details, such as email addresses and phone numbers, are used to find associated records.  If multiple opportunities are related, the most relevant one is matched based on call participants and the last modified date.	With Related Record Matching off, we won't match the Related Record field to anything.

Salesforce admins can turn the Related Record Matching feature on or off. From Setup, enter *Einstein Conversation Insights* in the **Quick Find** box, then select **General Settings**.

Related Record Matching uses call participant details (email addresses and phone numbers) to match opportunities and accounts to calls. Closed opportunities and opportunities that haven't been modified within two years aren't included.

## Set Up Einstein Conversation Insights

Use the Setup menu to get the guidance you need for setting up Einstein Conversation Insights. Connect a recording provider, assign permission sets, and define insights to use Einstein Conversation Insights. After the setup process is complete on the org and user levels, calls are processed automatically, and call data can be found on voice and video record pages.

Review [considerations](#) and plan your implementation prior to setup.

Set Up Einstein Conversation Insights in five steps.

1. [Turn on Einstein Conversation Insights.](#)
2. [Connect voice or video recording providers.](#)
3. [Turn on additional Einstein Conversation Insights features.](#)
4. [Assign relevant permission sets.](#)
5. [Set up call insights.](#)

### [Considerations for Setting Up Einstein Conversation Insights](#)

Before setting up Einstein Conversation Insights, consider these requirements, limitations, and nuances.

### [Security and Data Storage for Einstein Conversation Insights](#)

Review our policies around security and data storage specific to Einstein Conversation Insights.

### [Turn On Einstein Conversation Insights](#)

Enable Einstein Conversation Insights from the General Settings page in Setup.

### [Connect Voice Recording Providers](#)

Connect at least one recording provider to use Einstein Conversation Insights.

### [Connect Video Recording Providers](#)

Connect Zoom Meetings, Google Meet, or Microsoft Teams to use Einstein Conversation Insights with your video calls.

### [Turn on Additional Features for Einstein Conversation Insights](#)

Turn on opportunity matching and reporting features from Setup.

### [Assign Conversation Insights Permission Sets](#)

Assign the permission sets for Einstein Conversation Insights from Setup.

### [Set Up Call Insights](#)

Define call insights related to mentions of competitors and products that are important to your Salesforce org. And create custom insights for when words or phrases relevant to your teams are mentioned.

### [Add Call Summaries to Voice Calls, Video Calls, and Related Records](#)

If you have call summaries enabled, use the Lightning App Builder to add the Call Summary component to voice and video call records if they're not added by default. And add the Call Summary Related List component to the page layouts of related records.

### [Add Call Explorer to Voice Calls and Video Calls](#)

Enable Call Explorer by turning on the feature in Setup and assigning the related permission set to users.

### [Turn On Sales Signals](#)

Enable Sales Signals from the Einstein for Sales page in Setup.

### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise**, **Performance**, and **Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

### USER PERMISSIONS

To enable Einstein Conversation Insights:

- [Customize Application](#)

### [Add Generative Conversation Insights to Page Layouts](#)

If you have conversation insights enabled, use the Lightning App Builder to add the component to video call records if they're not added by default.

### [Run the Einstein Conversation Insights Assessor](#)

Wondering whether you're ready for Einstein Conversation Insights or whether it can help your sales and service managers? Run the Einstein Conversation Insights Assessor to find out. We analyze your Salesforce implementation, in either a production or sandbox environment, and then send you a personalized report. The report tells you whether you're ready to use Einstein Conversation Insights or whether you need to complete additional steps.

### [Guidelines to Start Using Einstein Conversation Insights](#)

Make sure sales and service users have Einstein Conversation Insights (ECI) licenses and record calls to start using ECI. Recorded customer calls are then processed automatically if they're over 10 seconds long for voice calls and over 1 minute long for video calls.

#### SEE ALSO:

[Einstein Conversation Insights](#)

## Considerations for Setting Up Einstein Conversation Insights

Before setting up Einstein Conversation Insights, consider these requirements, limitations, and nuances.

### General

- Einstein Conversation Insights isn't supported in Experience Cloud sites.
- Einstein Conversation Insights isn't supported in Government Cloud. Contact your Salesforce account executive for more details.
- Einstein Conversation Insights stores some of your data using a public cloud provider located in the United States. Data from European orgs are stored in Europe, but processing occurs in the United States. For more details, see [Salesforce Infrastructure and Sub-processors](#).
- Sales Dialer is available for an extra cost as an add-on license.
- [Set up a role hierarchy](#) to get the most use out of Einstein Conversation Insights. At least two levels of role hierarchy are required to create and use the Conversation Insights dashboards.
- Einstein Conversation Insights included in Sales Cloud Unlimited Edition provides analytics reporting using the CRM Analytics platform. When using this functionality, your license doesn't allow you to:
  - Build custom analytics apps or dashboards
  - Upload, access, or connect external data using the API with the exception of datasets provided with Sales Cloud Einstein
  - Import data from Salesforce standard or custom objects that aren't included in this feature

#### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise**, **Performance**, and **Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

**Table 4: User Permissions**

Salesforce Admin or User Task	Preferences and Permissions Required
Set up Einstein Conversation Insights	Customize Application, Modify All Data, Assign Permission Sets, and Manage Users
To use Einstein Conversation Insights for Sales	Sales Engagement Conversation Insights, Sales Cloud Bundle Included, Einstein Conversation Insights Included, OR Conversation Insights for Sales permission set

Salesforce Admin or User Task	Preferences and Permissions Required
To use Einstein Conversation Insights for Service	Conversation Insights for Service permission set
To delete video call records	Modify All Data
Use Dialer	Dialer Inbound, Dialer Outbound, and Dialer Minutes permission sets

## Subscription Considerations and Limitations

- Each Einstein Conversation Insights subscription includes up to 675 processed hours of calls per year per license. This limit is based on the total hours of all licenses, so an org with 10 licenses can process 6,750 call hours across all Einstein Conversation Insights users over 12 months.
- Orgs using Sales Cloud Enterprise Edition can access 10 Einstein Conversation Insights licenses at no extra cost. Each Einstein Conversation Insights Standard license includes up to 60 processed hours of calls per year per license.
- If an org is using Unlimited Edition or Performance Edition, each Einstein Conversation Insights Included license includes up to 120 processed hours of calls per year per license. Usage is calculated at the org level based on the total number of licenses rather than separately for each license. The feature includes automatic insights for Sales only. Customers can buy more ECI hours, as needed.
- Salesforce employees can access and review this data, including recorded phone calls or video meetings, for the purposes of improving and training the product.
- Conversation Insights is compatible with Sales Dialer out of the box, along with Google Meet, Microsoft Teams, and Zoom Meetings for video calls. Zoom Phone is not available out of the box. Dialpad, RingCentral, Aircall, and Amazon Connect are available with [additional setup](#). Other supported partners are available [via API](#). Integration work is required from the customer to add a new recording provider.
- Conversation Insights doesn't record your calls. Rather, you connect it with your recording system. It's a customer's responsibility to manage consent and comply with local privacy requirements in the way calls are recorded.
- Einstein Conversation Insights is available in the following languages and dialects:
  - Arabic
  - Bulgarian
  - Catalan
  - Chinese (Simplified and Traditional)
  - Croatian
  - Czech
  - Danish
  - Dutch
  - English (Australia), English (England), English (India), English (Ireland), English (New Zealand), English (Scotland), English (US)
  - Finnish
  - French (Canada), French (France)
  - German
  - Greek
  - Hebrew
  - Hindi
  - Hungarian

- Icelandic
- Indonesian
- Italian
- Japanese
- Korean
- Latvian
- Lithuanian
- Norwegian
- Polish
- Portuguese (Brazil), Portuguese (Portugal)
- Punjabi
- Romanian
- Russian
- Serbian
- Slovak
- Spanish (Spain), Spanish (US)
- Swedish
- Thai
- Turkish
- Ukrainian
- Vietnamese

The automatic insights available (including Next Steps and Objection-related insights) can vary widely by language. To see the full list of supported automatic insights by language, go to Call Insights under Einstein Conversation Insights in Setup and select the **Automatic** tab. We're continually offering additional support, but make any usage decisions based on currently available insights.

- Einstein Conversation Insights is included with Performance and Unlimited editions. If you have users in an Unlimited or Performance Edition org who accessed Einstein Conversation Insights through an add-on license before Summer '22, we recommend that you assign those users the Sales Cloud Included or Einstein Conversation Insights Included permission sets, or a custom permission set that includes it. To make these assignments, add the new permissions to your users before removing the old permissions. Beginning in Summer '22, you can't add users to the add-on permission sets in Unlimited or Performance Edition orgs. To manage your permission set assignments, see [Assign Conversation Insights Permission Sets](#).

## Feature Availability Limitations

- Conversation Insights dashboards are refreshed roughly every 8 hours by default, and it takes some time to create dashboards after initially enabling Conversation Insights. To modify the dataflow settings, go to **Analytics Studio** from the App Launcher. Click **Data Manager** from the menu on the left, and then **Manage Dataflows** at the bottom of the menu. Select the **Dataflows** tab and select **Schedule** in the dropdown for the Conversation Intelligence Call Insights Dataflow.
- The recording is available as soon as it's uploaded to Salesforce. Processing begins as soon as the recording is uploaded, and it takes time to process and analyze recorded calls based on the size of the recording.. Each call recording file must contain only one call for processing. Einstein Conversation Insights doesn't support multiple calls in a single recording file.
- If there are at least 3 calls with insights or relevant content in the previous day, the Call Highlights email is sent.
- Video calls are not processed if they include over 40 participants.
- Voice calls shorter than 10 seconds in duration are not processed depending on the recording provider.

- Video calls over 3 hours in duration may not process properly.
- Each video call record is associated with a single recording. If multiple recordings are made from a meeting, the longer recording is the one associated with the video call record.
- Calls are not processed for trial or demo orgs.
- Call collections are limited to 100 items and 100 members for each call collection.
- If you're creating a sandbox from an org that already has voice calls, voice call records and voice call recordings aren't copied over. To use the feature in sandbox, you must enable Conversation Insights from Setup again.

## Considerations for Use with Service Cloud, Sales Engagement, and Other Applications

- Although Einstein Conversation Insights can be added to Service Cloud licenses, Einstein Conversation Insights is optimized for sales conversations.
- When Service Cloud Voice and Conversation Insights are both turned on in the same production org, copying the production org to a sandbox turns off Conversation Insights and breaks the flow of data to the Service Cloud Voice CRM Analytics app. To restore the data flow, turn on Conversation Insights in the sandbox.
- Service Cloud Voice supports encryption of your call recordings stored in S3, but Einstein Conversation Insights does not support that encryption.
- If your org uses dataflows, make sure that existing dataflows don't set a default value for the ParentRoleId field on the UserRole object. This value restricts users from viewing voice calls owned by their subordinates based on the Salesforce role hierarchy.
- If Einstein Conversation Insights is enabled and Sales Engagement users have connected Zoom accounts, their meeting content is processed and made available to their managers.
- If an Einstein Conversation Insights license is removed during a call, Einstein Conversation Insights doesn't process the related call.
- Connecting to a recording provider shares the email addresses of Salesforce users with the recording provider to match recorded calls with users.

## Supported Features and File Types

- MP3, FLAC, WAV, MP4, and M4A file types are supported.
- MP4 files are supported for video only.
- Each recording is limited to 64 MB.
- Sound eXchang is used to convert MP3, FLAC, and WAV files. See the [SoX page](#) for information about [supported codecs](#).
- FFmpeg is used to convert MP4 and M4A files. See the [FFmpeg page](#) for information about [supported codecs](#).
- Shield Platform Encryption isn't supported.

## Other Considerations and Limitations

- Speaker identification can be based on call metadata provided by the vendor or the use of machine learning models. Transcript accuracy and speaker identification are not always accurate if incorrect information is received from the vendor or the machine learning model results are not accurate. We're continually working to improve the quality of the speaker data. We recommend turning on [Optimal Speaker Separation](#) to help improve the quality of transcripts and insights.
- To see transcripts from Zoom meetings, enable the Cloud recording and transcript features in Zoom in advance. After enabling the feature in Zoom, it can take some time before transcripts are available in Salesforce.
- Orgs can have up to 100 custom insights. Each insight can have a maximum of 25 keywords, with each keyword limited to 255 characters.

- The opportunity amount filter doesn't support the currency format or decimals. When entering a new value in the opportunity amount filter, tab out of the widget to update the dashboard with your changes.
- If your org is using Opportunity Matching, the user placing the call needs access to the related opportunity for it to be matched for voice calls. User access isn't required for opportunity matching with video calls.
- In order for the video integration to work, the email address of the connected video account must match the email address used to log into Salesforce.
- To delete video call records, the Modify All Data permission is required.
- Search functionality within a transcript is not currently supported.

## Security and Data Storage for Einstein Conversation Insights

Review our policies around security and data storage specific to Einstein Conversation Insights.

Our [Trust and Compliance](#) site has detailed information about Salesforce services, including [Einstein Platform Security, Privacy, and Architecture](#) and [Einstein Platform Notices and License Information](#).

Salesforce Einstein uses global predictive models to provide customers with meaningful predictions. Personally Identifiable Information (PII) is not used in these models. To opt out of global models, see [Salesforce Einstein: Global Model Opt-Out Process](#).

For more information about data policies across Einstein features, see [Manage Data Policies for Einstein Features](#) and [Einstein and Data Usage in Sales Cloud, Service Cloud, and Einstein Platform](#).

### Call Privacy

Voice and video call record access is controlled by role hierarchy and sharing rules by default. Managers can review calls made by their entire team and share call collections.

For information about managing record access, see [Create Sharing Rules](#).

For any call that has a related record, the call is visible in the activity timeline of that record for those that have access to the voice or video call.

### Recording Provider Data Security

Data security is a top priority, and Einstein Conversation Insights only crawls recordings made by authenticated Einstein Conversation Insights users.

Video meetings are processed by Einstein Conversation Insights only if they are owned by an ECI user and include external participants based on domain name, or recorded meetings that include only a single internal ECI user.

If users are logged in as a guest or are calling in from a meeting room, ECI does not get an email address of these participants from the recording provider. These calls are considered external and are processed.

Improve speaker identification by turning on [Einstein Activity Capture](#). ECI can use Einstein Activity Capture calendar integration to match call participants with existing contact records.

Salesforce admins have the ability to exclude specific domains for the entire company, and individual users can also exclude domains as needed. For more information, see [Manage Excluded Addresses and Domains for Video Integration Users](#).

 **Note:** For Microsoft Teams, Read All permission is required to give Einstein Conversation Insights access to call records. Access can't be limited at this time due to Microsoft Teams limitations. As with other recording providers, only call records made by authenticated ECI users are processed internally. Microsoft Teams recordings are left on Teams servers and only transcripts and insights processed by ECI are stored in Salesforce. For more information, see [Data Security for Microsoft Teams Integration with Einstein Conversation Insights](#).

#### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise**, **Performance**, and **Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

## Data Storage

Voice call recordings from telephony providers are stored in Salesforce for two years and don't count against your data storage limits. This does not apply if you're using a native Salesforce telephony provider such as Sales Dialer. Dialer call recordings are saved as files in Salesforce.

An hour of recording takes up roughly 15 MB of storage space, and the same sharing rules apply to recordings as other files in Salesforce. Admins can delete video call recordings from the Recording Management page in Setup.

To extend the retention period for voice calls, reach out to Salesforce Support.

Video conferencing calls are live-streamed when you access the video record page. Video calls are stored according to the settings of each video recording provider, and must be accessible through cloud storage to be processed by Einstein Conversation Insights.

## Record Deletion

Records can be deleted from voice or video call record pages.

Admins can also use Setup to delete video call records, recordings, and participants by email. Enter *Delete Video Calls* in the **Quick Find** box in Setup and select **Delete Video Calls**.

Voice recordings are stored with the voice call record, which admins can manually delete. This deletes all data associated with the recording, including the transcript, comments, and any call insights.

Salesforce Support is also available to help delete records.

## Turn On Einstein Conversation Insights

Enable Einstein Conversation Insights from the General Settings page in Setup.

1. From Setup, enter *Einstein Conversation Insights* in the **Quick Find** box, then select **General Settings**.
2. Turn on Conversation Insights.

The Conversation Insights Readiness indicator displays when the related dashboards are available. This process can take some time, so continue with the next steps until they're available.

### Troubleshooting Dashboard Creation Issues

You can resolve some dashboard creation problems from the Analytics Setup page. For more persistent issues, reach out to Salesforce Customer Support.

From Setup, enter *Analytics* in the **Quick Find** box, then select **Auto-Installed Apps** under the Apps section.

If the Conversation Intelligence app isn't successfully installed, click the Requests tab. Select the drop-down menu for the Conversation Intelligence request and click View Log.

The log describes what caused the Analytics app installation to fail. Resolve the issue then retry the installation from the drop-down menu.

Error Message	Related Issue and Solution
Something went wrong while executing the Sync_Lead node: Field [ScoreIntelligence] is not available. Verify that the field exists and that the Analytics Cloud Integration User profile has Read level access on the field.	Some fields aren't accessible for reporting. Make sure Data Sync is enabled and have your Analytics admin (with a CRM Analytics Growth Admin or CRM Analytics Plus Admin license)

### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise**, **Performance**, and **Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

### USER PERMISSIONS

To enable Einstein Conversation Insights:

- Customize Application

Error Message	Related Issue and Solution
	<p>open up field visibility from Analytics Data Manager.</p> <p>Data Sync is enabled by default in most orgs, but you may need to turn it on. From Setup, enter <i>Analytics</i> in the <b>Quick Find</b> box, then select <b>Settings</b>. Select <b>Enable Data Sync and Connections</b> if it's not enabled and save your changes.</p> <p>If you're an Analytics admin, navigate to the <b>Connect</b> node in the Analytics Data Manager and open the related object in the SFDC_LOCAL connection. Address problems of field visibility based on the errors reported, and retry the installation from the <b>Auto-Installed Apps</b> page.</p>
<p>Something went wrong while executing the Sync_Lead node: Field [ScoreIntelligenceId] is not available. Verify that the field exists and that the Analytics Cloud Integration User profile has Read level access on the field.</p>	<p>This error can occur if Lead Scoring was turned on-and-off in sandbox, and this sandbox environment was copied to production prior to enabling Einstein Conversation Insights.</p> <p>Turn Lead Scoring back on in your production environment to fix this issue.</p>
<p>Something went wrong while executing the Sync_Lead node: Fields [FirstEmailDateTime, FirstCallDateTime] are not available. Verify that the fields exists and that the Analytics Cloud Integration User profile has Read level access on the fields.</p>	<p>This error can occur if Sales Engagement was turned on-and-off in sandbox, and this sandbox environment was copied to production prior to enabling Einstein Conversation Insights.</p> <p>Turn Sales Engagement back on in your production environment to fix this issue.</p>

Enabling ECI creates a dataflow available in Analytics Studio. The dataflow for the dashboards is set to run every eight hours by default. To modify the dataflow settings, go to **Analytics Studio** from the App Launcher. Click **Data Manager** from the menu on the left, and then **Manage Dataflows** at the bottom of the menu. Select the **Dataflows** tab. You can update the schedule by selecting **Schedule** in the dropdown for the Conversation Intelligence Call Insights Dataflow.

## Connect Voice Recording Providers

Connect at least one recording provider to use Einstein Conversation Insights.

Einstein Conversation Insights can analyze recordings from different products. For a list, see [Recording Providers](#). For information about connecting video recording providers, see [Connect Video Recording Providers](#).

There are additional setup steps and requirements to connect Dialpad, RingCentral, Aircall, or Amazon Connect. For more information, see [Integrate Voice Connectors with Einstein Conversation Insights](#).

 **Note:** To use other recording providers, inquire about implementing an API solution to connect your provider. More information can be found in [Einstein Conversation Insights API Setup for Recording Providers](#).

Make sure that Dialer or your telephony solution is enabled. For more information about enabling Sales Dialer, see [Set Up Sales Dialer](#).

See [Phone Integration Considerations for Sales Engagement](#) for information about integrating your phone provider with Sales Engagement.

1. From Setup, enter **Einstein Conversation Insights** in the Quick Find box, and then select **General Settings**.
2. On the Settings page, connect a voice recording provider.
3. Click **Connect**.

## Connect Video Recording Providers

Connect Zoom Meetings, Google Meet, or Microsoft Teams to use Einstein Conversation Insights with your video calls.

 **Note:** Before you connect Zoom, enable the Cloud recording and “Create Audio Recording” features in your Zoom settings.

To improve speaker identification, we recommend turning on [Einstein Activity Capture](#). Einstein Conversation Insights can use Einstein Activity Capture calendar integration to match call participants with existing contact records.

1. From Setup, enter **Einstein Conversation Insights** in the Quick Find box, and then select **General Settings**.
2. On the Settings page, connect a video recording provider.  
For detailed information about adding specific recording providers, see the corresponding topics:
  - [Set Up Zoom Integration](#)
  - [Set Up Google Meet Integration](#)
  - [Set Up Microsoft Teams Integration](#)

3. Click **Connect**.

After video recording providers are enabled at the org level, users need to [connect their accounts](#) to use them with Einstein Conversation Insights.

### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise, Performance, and Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

### USER PERMISSIONS

To enable Einstein Conversation Insights:

- [Customize Application](#)

### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise, Performance, and Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

### USER PERMISSIONS

To enable Einstein Conversation Insights:

- [Customize Application](#)

## Turn on Additional Features for Einstein Conversation Insights

Turn on opportunity matching and reporting features from Setup.

These features aren't required to use Einstein Conversation Insights. Turn them on if they're appropriate for your business.

1. From Setup, enter *Einstein Conversation Insights* in the Quick Find box, and then select **General Settings**.
2. Turn on Optimal Speaker Separation to help with the creation of transcripts and call insights. Many ECI features rely on the availability of separate speaker tracks, so we recommend that all orgs enable the feature. After the feature is enabled, ECI users then receive individual banners prompting them to enable the feature.
3. Turn on related record matching to automatically match related records to voice and video calls.
4. Turn on insights reports and conversation-related measures for enablement.

This setting turns on reporting features for conversation insights measures. It also allows you to embed voice and video measures into Enablement programs. This setting isn't currently available to orgs with over 10,000 users.

Access out-of-the-box reports from the Einstein Conversation Insights Reports folder.

**Table 5: Einstein Conversation Insights Reports**

Report Name	Description
Avg Talk-to-Listen Ratio for Sales Rep	Voice Calls with Rep's Talk to Listen Ratio
Opportunities with Competitor Keywords	Opportunities with Competitor mentions
Opportunities with Voice Call Insights	Team's Opportunities with voice calls with Insights
Opportunities with Video Calls Insights	Opportunities with Videos with Insights
Deal Risks due to Objections	Deal Risks due to Objections mentioned
Video Calls with Contact Participants	Video Calls with Contact Participants
Voice and Video Calls with Comments	Voice and Video Calls with Comments
Voice and Video Calls Without Comments	Calls without comments that are candidates for coaching

Users can also access a related dashboard.

### EDITIONS

Available in: Lightning Experience

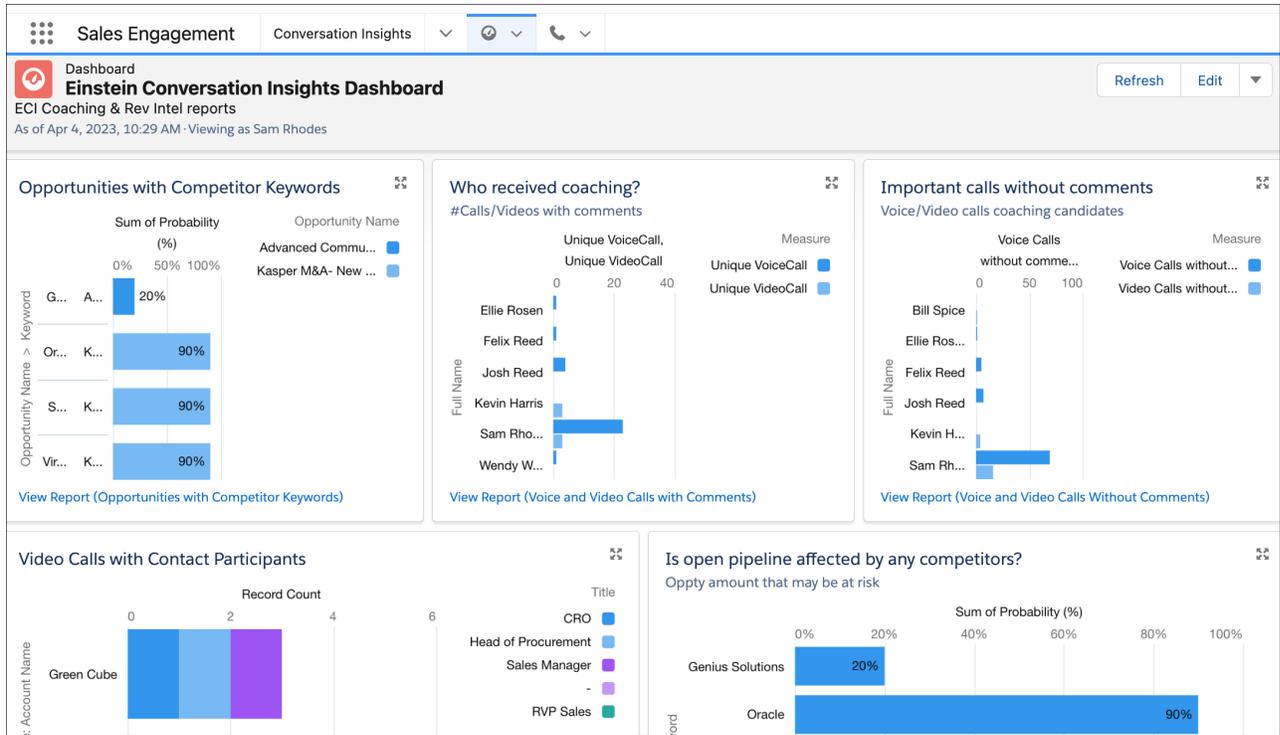
Available in Einstein Conversation Insights, which is available in **Enterprise**, **Performance**, and **Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

### USER PERMISSIONS

To enable Einstein Conversation Insights:

- Customize Application



5. Set the frequency for call highlights emails. These may include coaching recommendations and call insights based on significant keywords. Emails are sent if there were at least 3 calls with insights in the previous time period.
6. Turn on call summaries if your team's using the feature. From Setup, enter **Einstein for Sales** and follow the steps to turn on call summaries.

## Assign Conversation Insights Permission Sets

Assign the permission sets for Einstein Conversation Insights from Setup.

Calls placed before users are assigned ECI permission sets are not processed, and the recordings are not available on voice and video call records.

1. From Setup, enter *Permission Sets* in the Quick Find box, and then select **Permission Sets**.
2. Verify that the permission sets for Conversation Insights are available.
3. Click each permission set that you want to assign, and then click **Manage Assignments** to assign the permission set to users.

 **Note:** You can also assign permission sets per user. From Setup, enter *Users* in the Quick Find box, and then select **Users**. Click the name of individual users. In the Permission Set Assignments related list, click **Edit Assignments**.

We recommend that you make these assignments.

- If you're using Sales Cloud Enterprise Edition, you can access 10 Einstein Conversation Insights Standard permission sets.
- If you have a Sales Engagement license, assign the Sales Engagement Conversation Insights permission set to Sales Engagement users who need access to sales insights.
- If you have an Enablement license, assign the Conversation Insights for Sales or Conversation Insights for Service permission set to these users:
  - Enablement admins who want to incorporate ECI video calls into programs
  - Enablement users who are assigned to programs that include ECI conversation outcomes or milestones
- If you have a Sales Cloud Unlimited or Sales Cloud Performance license, assign the Einstein Conversation Insights Included or Sales Cloud Included Bundle permission set to users who need access to sales insights. These permission sets can be assigned to the [Salesforce standard user license](#) only.
- If you have standalone access:
  - Assign the Conversation Insights for Sales permission set to non-Sales Engagement users who need access to sales insights.
  - Assign the Conversation Insights for Service permission set to users who need access to service insights.

SEE ALSO:

[Sales Programs and Partner Tracks with Enablement](#)

### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise**, **Performance**, and **Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

### USER PERMISSIONS

To enable Einstein Conversation Insights:

- [Customize Application](#)

## Set Up Call Insights

Define call insights related to mentions of competitors and products that are important to your Salesforce org. And create custom insights for when words or phrases relevant to your teams are mentioned.

 **Note:** You can create up to 100 custom insights. Each insight can have a maximum of 25 keywords, with each keyword limited to 255 characters.

1. From Setup, enter **Call Insights** in the Quick Find box, and then select **Call Insights**.
2. From the Standard tab, enter the competitors and products that are important to your teams. Be conscious of the keywords and phrases that you select to avoid flagging sensitive information and to ensure the trust, safety, and privacy of your employees and customers. Limit words that could inadvertently or inappropriately affect people based on gender, religion, race, sexual orientation, income level, or any other sensitive category.  
  
Similarly, limit keywords that could be construed as surveilling or monitoring your employees. This feature isn't a tool to assess employee satisfaction, gauge performance, or define normative behaviors.
3. From the Custom tab, define insights for words or phrases that are relevant to your teams. To prevent incorrect classification, avoid keywords already covered by automatic insights. For example, mentions about payment and purchase orders are already covered by the Pricing Mentioned insight, and shouldn't be used for a new custom insight.

### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise**, **Performance**, and **Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

### USER PERMISSIONS

To enable Einstein Conversation Insights:

- Customize Application

## Add Call Summaries to Voice Calls, Video Calls, and Related Records

If you have call summaries enabled, use the Lightning App Builder to add the Call Summary component to voice and video call records if they're not added by default. And add the Call Summary Related List component to the page layouts of related records.

Prior to enabling Call Summaries, the following features must be enabled:

- Einstein Conversation Insights: This can be enabled in Setup, from the General Settings page under Einstein Conversation Insights.
- Einstein Generative AI: This can be enabled in Setup, from the Einstein Generative AI Setup page.

### Available in: Lightning Experience

Available in **Enterprise**, **Performance**, and **Unlimited** Editions with the Einstein for Sales add-on and Einstein Conversation Insights.

### USER PERMISSIONS

To enable Einstein Conversation Insights:

- Customize Application

Enable Call Summaries

Turn on the Sales Call Summaries feature from Setup. Navigate to the Einstein for Sales page and turn on the feature.

Assign Permission Sets

To grant access to generate and edit summaries, assign users the **Einstein Sales Call Summaries** permission set.

Add the Call Summary Lightning Components

The Call Summary component is typically added by default to the page layouts of voice and video call records, but it isn't added if you've customized the page layout. Add the component manually if it isn't there.

And add the separate Call Summary Related List component to all record types that might be related to voice and video calls, such as opportunities, accounts, leads, and contacts.

1. Add the Call Summary component

1. Navigate to a voice call or video call record page.

2. From the Setup menu, click **Edit Page**.

When you select **Edit Page** for the first time, Salesforce makes a copy of the standard page. This copy is what you edit in the Lightning App Builder. If a customized page exists and is active, selecting Edit Page opens that page to edit.

3. To add the Summary tab, select the Tab component and click **Add Tab** in the Tabs component properties. Then select the **Call Summary** tab.

Alternatively you can select the **Call Summary** component from the Components list and drag it to the desired place in the canvas.

4. You can customize the tab by clicking it in the properties pane.

5. Click **Save**.

2. Add the Call Summary Related List component

6. Navigate to a record detail page for a record type related to voice or video calls.

Alternatively you can open a page from the Lightning App Builder list page. From Setup, in the Quick Find box, enter *App Builder*, then select **Lightning App Builder**, and select the record page you want to edit.

7. Select the **Call Summary List View** component, and then drop it in the desired place on the record.

8. Click **Save**.

9. Repeat steps 6-8 for any other record types related to voice or video calls.

## Add Call Explorer to Voice Calls and Video Calls

Enable Call Explorer by turning on the feature in Setup and assigning the related permission set to users.

Prior to enabling Call Explorer, the following features must be enabled:

- Einstein Conversation Insights: This can be enabled in Setup, from the General Settings page under Einstein Conversation Insights.
- Einstein Generative AI: This can be enabled in Setup, from the Einstein Generative AI Setup page.

### USER PERMISSIONS

To enable Einstein Conversation Insights:

- Customize Application

#### Available in: Lightning Experience

Available in **Enterprise**, **Performance** and **Unlimited** Editions with the Einstein for Sales add-on and Einstein Conversation Insights.

1. From the Setup, enter *Einstein for Sales* in the Quick Find box and select **Einstein for Sales**.

2. Turn on Call Explorer.

3. From Setup, enter *Permission Sets* in the Quick Find box, and then select **Permission Sets**.

4. Click **Einstein Sales Call Explorer**, and then click **Manage Assignments** to assign the permission set to users.

 **Note:** You can also assign permission sets per user. From Setup, enter *Users* in the Quick Find box, and then select **Users**. Click the name of individual users. In the Permission Set Assignments related list, click **Edit Assignments**.

## Turn On Sales Signals

Enable Sales Signals from the Einstein for Sales page in Setup.

Prior to enabling Sales Signals, the following features must be enabled:

- Einstein Conversation Insights: This can be enabled in Setup, from the General Settings page under Einstein Conversation Insights.
- Einstein Generative AI: This can be enabled in Setup, from the Einstein Generative AI Setup page.

### USER PERMISSIONS

To enable Einstein Conversation Insights:

- Customize Application

### Available in: Lightning Experience

Available in **Enterprise, Performance, and Unlimited** Editions with the Einstein for Sales add-on and Einstein Conversation Insights.

1. Navigate to the **Einstein for Sales** page in Setup.
2. Make sure Data Cloud is set up.  
Follow the steps in the wizard to enable Data Cloud.
3. Connect Sales Signals to Data Cloud.  
Connecting Sales Signals starts a Data Cloud sync process of transcript and insight data from up to six months back, and ensures this data is captured moving forward.
4. Turn on Sales Signals.
5. Assign permission sets to users. To grant access to view and refresh Sales Signals, assign users the **Einstein Sales Signals** permission set.

## Add Generative Conversation Insights to Page Layouts

If you have conversation insights enabled, use the Lightning App Builder to add the component to video call records if they're not added by default.

Prior to enabling Generative Conversation Insights, the following features must be enabled:

- Einstein Conversation Insights: This can be enabled in Setup, from the General Settings page under Einstein Conversation Insights.
- Einstein Generative AI: This can be enabled in Setup, from the Einstein Generative AI Setup page.

### USER PERMISSIONS

To enable Einstein Conversation Insights:

- Customize Application

### Available in: Lightning Experience

Available in **Enterprise, Performance, and Unlimited** Editions with the Einstein for Sales add-on and Einstein Conversation Insights.

Enable Generative Conversation Insights

Turn on the Generative Conversation Insights feature from Setup. Navigate to the Einstein for Sales page and turn on the feature.

The Einstein1SalesGPTAddOn license is required to access the Generative Conversation Insights feature and related permission sets.

Assign Permission Sets

To grant access to conversation insights, assign users the Generative Conversation Insights permission set.

### Add the Generative Conversation Insights Lightning Components

The component is typically added by default to the page layouts of video call records, but it isn't added if you've customized the page layout. Add the component manually if it isn't there.

1. Navigate to a video call record page.
2. From the Setup menu, click **Edit Page**.

When you select **Edit Page** for the first time, Salesforce makes a copy of the standard page. This copy is what you edit in the Lightning App Builder. If a customized page exists and is active, selecting Edit Page opens that page to edit.

3. To add the Generative Insights tab, select the Tab component and click **Add Tab** in the Tabs component properties. Then select the **Generative Insights** tab.

Alternatively you can select the **Generative Insights** component from the Components list and drag it to the desired place in the canvas.

4. You can customize the tab by clicking it in the properties pane.
5. Click **Save**.

## Run the Einstein Conversation Insights Assessor

Wondering whether you're ready for Einstein Conversation Insights or whether it can help your sales and service managers? Run the Einstein Conversation Insights Assessor to find out. We analyze your Salesforce implementation, in either a production or sandbox environment, and then send you a personalized report. The report tells you whether you're ready to use Einstein Conversation Insights or whether you need to complete additional steps.

1. From Setup, in the Quick Find box, enter *Assessors*, and then select **Einstein Conversation Insights Assessor**.
2. Fill in the form and click **Generate Report**. If you're using a sandbox, click **Generate Report (Sandbox)**.

You can also [go directly to the assessor](#) and follow the instructions to let Salesforce access your data.

### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise**, **Performance**, and **Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

### USER PERMISSIONS

To enable Einstein Conversation Insights:

- Customize Application

## Guidelines to Start Using Einstein Conversation Insights

Make sure sales and service users have Einstein Conversation Insights (ECI) licenses and record calls to start using ECI. Recorded customer calls are then processed automatically if they're over 10 seconds long for voice calls and over 1 minute long for video calls.

To get started, make sure supported voice and video providers are connected at the org level, and also at the user level for video providers. New users are presented with a welcome mat and additional resources directing them to connect eligible recording providers and start using Einstein Conversation Insights.

Users need ECI licenses assigned in order for calls to be processed and for recordings to be available. Calls placed prior to a user having proper permissions are not processed. Permission sets that grant ECI access include:

- Conversation Insights for Sales
- Sales Engagement Conversation Insights
- Einstein Conversation Insights Included
- Einstein Conversation Insights Standard

A user without an ECI license who is given access to a call record by an ECI user can see it and leave comments.

For more information, see [Assign Conversation Insights Permission Sets](#).

Recorded calls are then processed automatically if they meet the following criteria:

- Voice calls are longer than 10 seconds. Calls less than 10 seconds are often not processed depending on the recording provider.
- Video calls are longer than 1 minute.
- Calls include at least two participants, with one participant being non-internal. Meetings with only internal attendees or those that include someone on the excluded list are not added to Salesforce. Recorded video meetings with only a single internal user (such as a sales pitch or other preparatory meeting) are processed like any other external meeting.
- The host or organizer of the meeting should be an ECI user. We use that user's connected data source to process the call.

Call recordings are available as soon as they're uploaded to Salesforce, though it can take some time to analyze calls based on the size of the recording.

Each video call record is associated with a single recording. If multiple recordings are made from a meeting, the longer recording is the one associated with the video call record.

Dashboards are refreshed about every 8 hours by default. Check the Voice Call and Video Call record pages or run a report if you want to see recent call data before the dashboards are refreshed. You can also update the dataflow settings in Analytics Studio.

Here are some additional resources to share with your team about using Einstein Conversation Insights:

- Video: [Coach Reps and Drive Revenue with Einstein Conversation Insights](#)
- Salesforce Help: [Einstein Conversation Insights](#)
- Trailhead: [Einstein Conversation Insights for Sales](#)

### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise**, **Performance**, and **Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

# Integrate Voice Connectors with Einstein Conversation Insights

If your sales or service teams are using Dialpad, RingCentral, Aircall, or Amazon Connect, you can connect their customer conversations with Einstein Conversation Insights (ECI) to get transcripts, insights, next steps, and more ECI features.

Amazon Connect when used with Service Cloud Voice with Amazon Connect is supported separately. Use the process here to integrate Amazon Support with ECI without Service Cloud Voice.

Follow these tasks to integrate supported voice providers with Einstein Conversation Insights. The tasks and guidelines outlined here apply to all providers. Each provider also includes unique configuration steps, which are described in separate guides for each provider.

## [Prepare to Set Up Voice Connectors](#)

Consider the requirements before setting up voice connectors.

## [Install the Voice Connector App](#)

Download the Voice Connector package from AppExchange or the provided link and install the app.

## [Launch the Voice Connector App](#)

Open the Voice Connector app from the App Launcher and select the provider you want to connect.

## [Configure the Voice Connector](#)

Go through the configuration steps described in the linked documents for each connector. These steps are the bulk of the work required for connecting the voice provider.

## [Assign an Integration User](#)

Assign the integration user for the voice connector app. The signed-in user is assigned as the integration user, so consider creating a separate user dedicated to third-party integrations with Einstein Conversation Insights.

## [Manage Excluded Numbers for Voice Connectors](#)

Voice calls aren't processed if any meeting attendee is on the excluded number list. Add numbers related to calls that you don't want processed. This step is optional.

## [Enable Voice Connector Integration](#)

Turn on the integration as the final step. The activation step order differs slightly depending on whether you want to automatically process calls from the past week.

## [Enable Variable Phone Number Support for ECI Voice Connectors](#)

To use variable phone number support for ECI Voice Connectors, make sure that the relevant user identifier fields are visible on the User object and these fields are added to the user layout.

## [Guidelines for Starting to Use Voice Connectors](#)

Make sure sales and service teams record calls to start using Einstein Conversation Insights. We recommend testing a call to make sure everything's set up correctly.

## [Troubleshooting Voice Connector Issues](#)

Check common issues as you troubleshoot voice connector issues.

## [Disable Voice Connector Integration](#)

Turn off the integration if you don't want to give Einstein Conversation Insights access to the voice connector. Make sure you also stop the scheduled jobs related to the connector.

### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise**, **Performance**, and **Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

## Prepare to Set Up Voice Connectors

Consider the requirements before setting up voice connectors.

### General Setup Considerations

- This setup process should be completed by a Salesforce admin with the appropriate permissions.
- It's a Salesforce best practice to use a separate user to complete the integrations between ECI and your voice provider. You can create a user with Salesforce admin permissions dedicated to this purpose in advance, and then log in as this user for the configuration tasks.
- Admin access to the individual voice connectors is also required during the implementation process. Make sure you have that information available if it's handled by someone else.
- Depending on the voice connector, you sometimes need to email the related vendor, which can add time to the implementation process.
- To enable variable phone number support, additional steps are required. For more information see, [ECI Voice Connector Variable Phone Number Support](#).

**Table 6: User Permissions**

Salesforce Admin or User Task	Preferences and Permissions Required
To set up Einstein Conversation Insights	Customize Application, Modify All Data, Assign Permission Sets, and Manage Users
To complete integration tasks	Conversation Insights Integration User
To use Einstein Conversation Insights for Sales	Sales Engagement Conversation Insights, Sales Cloud Bundle Included, Einstein Conversation Insights Included, OR Conversation Insights for Sales permission set
To use Einstein Conversation Insights for Service	Conversation Insights for Service permission set

### Other Setup Considerations

- Retrieving call data from third-party CTI provider APIs can include limitations around how many calls are supported. Check with your provider for any limitations.
- Calls are pulled in real time from each provider's API. Call are also pulled in a batch update every hour for the first day if they're not pulled in real-time. For calls created more than a day ago, use the Error Handling tab to retry processing. For Dialpad, batch updates are also run every hour, though there can be a delay of 24 hours before a call is pulled in.
- ECI doesn't record calls, and a call being recorded is necessary in order to be processed by ECI.
- If your CTI supports mono call recordings only, instead of stereo, then enable the Optimal Speaker Separation setting to produce transcripts and fully process calls. This setting can be enabled in Setup, in General Settings under Einstein Conversation Insights.
- For Dialpad, we recommend contacting Dialpad Support about enabling auto recording capture prior to enabling the connector integration. Otherwise, only calls that are manually recorded by a rep are processed.
- For Amazon Connect, closely follow the configuration documentation. The Salesforce / Amazon Connect integration must be set up in a specific way to ensure the correct data exists to process calls.
- If a voice connector is disabled, delete any related scheduled jobs before enabling the connector again. If the scheduled jobs aren't deleted, you can't enable the connector again.

#### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise, Performance, and Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

Available with Enablement, which is available for an additional cost in: **Enterprise, Performance, and Unlimited** Editions

- For Aircall, Dialpad, and RingCentral, you can process calls that were made over the past seven days immediately after turning on the voice connector. This enables you to test and work with call insights, transcripts, and other features right away.

For a full list of considerations related to Einstein Conversation Insights, see [Salesforce Help](#).

## Install the Voice Connector App

Download the Voice Connector package from AppExchange or the provided link and install the app.

1. Go to the [AppExchange listing](#) or [this page](#) and download the Voice Connectors for Einstein Conversation Insights package.
2. After the package has been downloaded, open it and select **Install for All Users**.
3. Install the package.  
You receive an email from Salesforce confirming that the package was installed.

## Launch the Voice Connector App

Open the Voice Connector app from the App Launcher and select the provider you want to connect.

1. From the App Launcher, enter *Voice Connector* in the Search box, and then select **Voice Connector**.
2. Select the voice provider you want to connect.
3. Agree to the terms and conditions.

### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise**, **Performance**, and **Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

### USER PERMISSIONS

To enable Einstein Conversation Insights:

- Customize Application

### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise**, **Performance**, and **Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

### USER PERMISSIONS

To enable Einstein Conversation Insights:

- Customize Application

## Configure the Voice Connector

Go through the configuration steps described in the linked documents for each connector. These steps are the bulk of the work required for connecting the voice provider.

1. From the **Configure Named Credentials** step, click **Configure Named Credential**.  
The configuration guide for each voice provider appears.
2. Follow the instructions in the guide. The current configuration guide for each voice provider is also available here:
  - a. [Aircall Configuration Guide](#)
  - b. [Amazon Connect Configuration Guide](#)
  - c. [Dialpad Configuration Guide](#)
  - d. [RingCentral Configuration Guide](#)

These instructions involve more than configuring the named credentials and are different for each connector.

## Assign an Integration User

Assign the integration user for the voice connector app. The signed-in user is assigned as the integration user, so consider creating a separate user dedicated to third-party integrations with Einstein Conversation Insights.

An integration user is assigned the custom access necessary to complete integrations between ECI and your voice provider. It's a Salesforce best practice to use a separate user for this purpose and to dedicate this user to this integration.

You likely created a dedicated integration user based on the guidelines in the connector-specific configuration guides. Use that user for this task.

1. From Setup, enter `users` in the Quick Find box, and then select **Users**.
2. Make sure an ECI access permission set and the Conversation Insights Integration User permission set are assigned to the integration user. Assign the System Administrator profile. The user also needs **API Enabled** enabled and access to the Voice Call object.

For Amazon Connect, if you're using a separate integration user for your Amazon Connect integration, this user also needs ECI access.

3. Log in as the integration user, and open the Voice Connector app.
4. From the Assign Your User as the Integration User step, click **Assign Integration User**.

### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise**, **Performance**, and **Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

### USER PERMISSIONS

To enable Einstein Conversation Insights:

- Customize Application

### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise**, **Performance**, and **Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

### USER PERMISSIONS

To enable Einstein Conversation Insights:

- Customize Application

## Manage Excluded Numbers for Voice Connectors

Voice calls aren't processed if any meeting attendee is on the excluded number list. Add numbers related to calls that you don't want processed. This step is optional.

1. Click the Excluded Numbers tab, or from the Exclude Phone Numbers from Data Capture step, click **Manage Excluded Numbers**.
2. Click **Add**.
3. Add any phone numbers you want to exclude from data capture.
4. Click **Exclude**.

## Enable Voice Connector Integration

Turn on the integration as the final step. The activation step order differs slightly depending on whether you want to automatically process calls from the past week.

You can automatically process voice calls associated with the connector from the past 7 days. This feature isn't available with Amazon Connect.

If you don't want to process voice calls, do steps 2–3 first, and then step 1.

1. From the Enable Integration step, turn on the toggle.
2. From Setup, enter **Einstein Conversation Insights** in the Quick Find box, and then select **General Settings**.
3. Turn on the voice connector you set up.

 **Note:** For Dialpad, we recommend that you contact [Dialpad Support](#) about enabling auto recording capture prior to enabling the voice connector integration. For more information, see the [Dialpad Configuration Guide](#).

### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise**, **Performance**, and **Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

### USER PERMISSIONS

To enable Einstein Conversation Insights:

- Customize Application

### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise**, **Performance**, and **Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

### USER PERMISSIONS

To enable Einstein Conversation Insights:

- Customize Application

## Enable Variable Phone Number Support for ECI Voice Connectors

To use variable phone number support for ECI Voice Connectors, make sure that the relevant user identifier fields are visible on the User object and these fields are added to the user layout.

### Add User Object Fields

After installing the Voice Connector package, the User object has three new fields that are directly related to the information for CTIs: Aircall User Identifier, Dialpad User Identifier, and RingCentral User Identifier.

#### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise, Performance, and Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

#### USER PERMISSIONS

To enable Einstein Conversation Insights:

- Customize Application

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Aircall User Identifier	voice_connector__Aircall_User_Identifier__c	Text(255)		
Dialpad User Identifier	voice_connector__Dialpad_User_Identifier__c	Text(255)		
RingCentral User Identifier	voice_connector__RingCentral_User_Identifier__c	Text(255)		

By default, these fields are hidden from users. To make the fields visible, complete these steps.

1. Select each field and click **Set Field-Level Security**.
2. Make sure that the visibility checkbox is selected for the required user profiles, and then click **Save**.
3. Add the fields to the user layout.

Additional steps are required to access the unique user identifier for these fields to match the user to their respective CTI account. The user identifier can be the user ID or user email address.

## Access User Identifier for Aircall

For Aircall, both the user ID and user email are found on the user profile page. The user ID is visible in the Aircall dashboard URL. For example, if the URL is <https://dashboard.aircall.io/users/931756/general>, the user ID is 931756. To get the user email address, follow these steps.

1. From the Aircall dashboard, click **Users**, and select the user profile.
2. Scroll down to Account credentials and find the email address of the user.

## Access User Identifier for Dialpad

For Dialpad, the user email address is available on the Dialpad user profile page. To get the user ID, you must have access to the API.

1. Do a GET fetch from the endpoint <https://dialpad.com/api/v2/users>.  
It returns the list of your accounts users.
2. Find the user ID for the specific user you want. The key ID information is in bold. For example, "**id**": "5296465605984256".

## Access User Identifier for RingCentral

For RingCentral, you can only use the user's extension ID to match the user with the CTI account. To get this ID, complete these steps.

1. Go to the RingCentral API URL: <https://developers.ringcentral.com/api-reference>.  
The landing page provides information about how to use the API.
2. From the left-menu bar, click **Address Book > Internal Contacts > Get Company Directory Entries**.  
From this API endpoint, you can get all the call coaching user information.
3. Click **Sign in to try it out**.
4. From the API Reference preferences window, select the environment (**Sandbox** or **Production**), and then click **Authorize**.  
A success message confirms that you're authorized to make API calls.
5. Click **Try it out**.  
On the right-hand side of the screen, the metadata information is shown. It shows 200 OK, which means that your request was successful.
6. Expand **records** to see the users that are set up with RingCentral and find the user that you want to match with the corresponding Salesforce user profile field.
7. Get the **id** value for that user. For example, "**id**": "814243005".

## Guidelines for Starting to Use Voice Connectors

Make sure sales and service teams record calls to start using Einstein Conversation Insights. We recommend testing a call to make sure everything's set up correctly.

### Assign Permissions/Licenses

To get started, make sure users are using the voice providers appropriately. Users must have an Einstein Conversation Insights permission set assigned.

### Set Up User ID/Phone Number Matching

When the Voice Connector package is installed, three new fields are automatically added to each Salesforce user profile (Dialpad User Identifier, Aircall User Identifier, Ringcentral User Identifier). These fields must be populated with the user ID that Salesforce receives from each call record. Please populate the corresponding field, based on which connector you use, for each user.

### Considerations for User ID/Phone Mapping

For new phone calls that are received, the Voice Connector app matches each call to a Salesforce user in the following ways:

For Aircall, RingCentral, and Dialpad

1. Uses ID from each phone call and matches to the corresponding Salesforce user profile fields (Aircall User Identifier OR RingCentral User Identifier OR Dialpad User Identifier).
2. If no match is made, uses corresponding to/from phone number from call and matches to the corresponding Salesforce user profile field (Phone).
3. If no match is made, call has no identified user, and call is not processed.

For Amazon Connect

1. Uses (Agent Login Username) from the Contact Channel Trace record and matches against Salesforce user profile field (Amazon Connect Username).
2. If no match is made, matches to Salesforce user profile field (Email).
3. If no match is made, uses corresponding to/from phone number from call and matches to the corresponding Salesforce user profile field (Phone).
4. If no match is made, call has no identified user, and call is not processed.

If the same call is matched to multiple users, the user with the most recent Last Modified Date is associated with the related call.

Recorded calls are then processed automatically if they meet these criteria.

- Voice calls are longer than 10 seconds. Calls less than 10 seconds long are often not processed depending on the recording provider.
- Calls include at least two participants, with one participant not internal. Meetings with only internal attendees or meetings that include someone on the excluded list aren't added to Salesforce.

A temporary object, VC Call, is used to process calls. If a VC Call record isn't created for the call, something went wrong with the integration. If a VC Call record is created, but the call isn't processed, an issue with the user, assignment, or phone number exists.

Call recordings are available as soon as they're uploaded to Salesforce, though it can take time to analyze calls based on the size of the recording.

Calls are pulled in real time from each provider's API. Call are also pulled in a batch update every hour if they're not pulled in real-time. For Dialpad, batch updates are also run every hour, though there can be a delay of 24 hours before a call is pulled in.

### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise, Performance, and Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

## Troubleshooting Voice Connector Issues

Check common issues as you troubleshoot voice connector issues.

For a full list of considerations related to Einstein Conversation Insights, see the [Salesforce Help](#).

### Feature Enablement and Access Issues

- Verify that the voice connector is enabled in the Voice Connector app and in the Einstein Conversation Insights page in Setup.
- Verify that the Voice Connector Permission and Conversation Insights Integration User are assigned to the Voice Connector Guest User.
- Verify that the Salesforce site is active. You can check that the site exists and is active in the Sites page in Setup.
- Verify that the named credentials are properly authenticated. You can check this from the Named Credentials page in Setup. Check that the Authentication Status field is Authenticated and that the scope is accurate.
- Verify that the Auth. Provider settings are correct. You can check this from the Auth. Providers page in Setup. For Dialpad and RingCentral, make sure the Provider Type is Open ID Connect and these checkboxes are selected.
  - Send Access Token in Header
  - Include Consumer Secret in SOAP API Responses
  - Send client credentials in the header

### VCCall Issues

If the VCCalls aren't being assigned to a user, verify instructions above for user matching, using the Salesforce user profile compared to the data received from each phone call.

If you're still encountering VCCall issues, check the VCLog. You can view the log from a VCCall record, under the Related tab, under VCLog. Look for useful debugging information there.

### Error Handling

If users aren't seeing their calls in Salesforce, you can use the Error Handling tab to identify and try to reprocess the call.

From the Voice Connector app, select the Error Handling tab to access the page. It's possible to retrieve a list of voice calls by the user within a certain date or retrieve individual calls by the ID.

ECl automatically tries to process calls that weren't initially processed successfully. For calls created more than a day ago, use the Error Handling tab to retry processing.

#### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise, Performance, and Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

Available with Enablement, which is available for an additional cost in: **Enterprise, Performance, and Unlimited** Editions

## Disable Voice Connector Integration

Turn off the integration if you don't want to give Einstein Conversation Insights access to the voice connector. Make sure you also stop the scheduled jobs related to the connector.

1. From the App Launcher, enter *Voice Connectors* in the Search box, and then select **Voice Connectors**.
2. Select the voice connector you want to disconnect.
3. From the **Enable Integration** step, turn off the toggle.
4. From Setup, enter *Einstein Conversation Insights* in the Quick Find box, and then select **General Settings**.
5. Turn off the voice connector you want to disconnect.
6. Enter *Scheduled Jobs* in the Quick Find box, and then select **Scheduled Jobs**.
7. Delete the jobs related to the voice connector.  
If the scheduled jobs aren't deleted, you can't enable the connector again.

### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise, Performance, and Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

### USER PERMISSIONS

To disable Einstein Conversation Insights:

- Customize Application

## Sales Cloud Everywhere

The Salesforce Chrome extension in Sales Cloud lets you work with your To Do List, see engagement alerts, create and update records, and more, without leaving the web page you're on.

[Watch a demo.](#)

### [Enable and Disable the Salesforce Chrome Extension](#)

Salesforce admins can let users access the Salesforce Chrome extension by turning on settings in Setup and inviting users to install the extension.

### [See Engagement Notifications in Sales Cloud Everywhere](#)

With My Feed in the Salesforce Chrome extension side panel, you can see all your recent engagement alerts while viewing web pages. You can filter on engagement type, review the history of notifications in the feed, and pick the right moment to reach out to a prospect. For example, if you get a notification in the side panel, you can quickly shift your attention to the engaged prospect without switching browser tabs.

### [Work on Your To Do List in Sales Cloud Everywhere](#)

With the To Do List in the Salesforce Chrome extension, you can view, filter, sort, search, and complete your pending tasks within the side panel. You can visit any web page at the same time, letting you view relevant information outside of Salesforce while prioritizing and completing your tasks.

### [Follow Up on Companies and People of Interest in Sales Cloud Everywhere](#)

Easily keep Salesforce up to date while you look for future customers by researching companies and individuals on the internet. Then add a record or update Salesforce with the latest information.

### EDITIONS

Available in: Lightning Experience

Available in: **Starter, Enterprise, Performance, Unlimited, and Developer** Editions with Sales Cloud

### [View and Create Records in Sales Cloud Everywhere](#)

You can view and create records efficiently in the Salesforce Chrome extension side panel while viewing relevant information on the web. For example, when you identify a prospect on a company's web page, you can create the lead record in the extension side panel while viewing the prospect's information on the web.

### [Considerations for Working in Sales Cloud Everywhere](#)

As you work in the Salesforce Chrome extension, keep these considerations in mind.

### [Workspace](#)

Access Workspace list experience from the Salesforce Chrome extension side panel. Workspace opens in a new browser tab, where you can personalize your list view to work with just the records you're interested in. Filter, search, query, and update records directly in each Workspace list.

## Enable and Disable the Salesforce Chrome Extension

Salesforce admins can let users access the Salesforce Chrome extension by turning on settings in Setup and inviting users to install the extension.

1. In Setup, enter *Sales Cloud Everywhere* in the Quick Find box. Then click **Sales Cloud Everywhere**.
2. Find the setting **Use Salesforce Across the Web** and enable it to use the Sales Cloud Everywhere Chrome Extension.  
Disable the setting to prevent users from accessing the Sales Cloud Chrome Extension.
3. Tell your users to install the Sales Cloud Chrome extension from the [Chrome Web Store](#).

The extension prompts users to log in to Salesforce the first time they open the extension.

### SEE ALSO:

[Considerations for Working in Sales Cloud Everywhere](#)

[Considerations for Using Workspace in Sales Cloud Everywhere](#)

### EDITIONS

Available in: Lightning Experience

Available in: **Starter, Enterprise, Performance, Unlimited,** and **Developer** Editions with Sales Cloud

### USER PERMISSIONS

To enable and disable the Salesforce Chrome extension:

- Customize Application  
AND  
Modify All Data

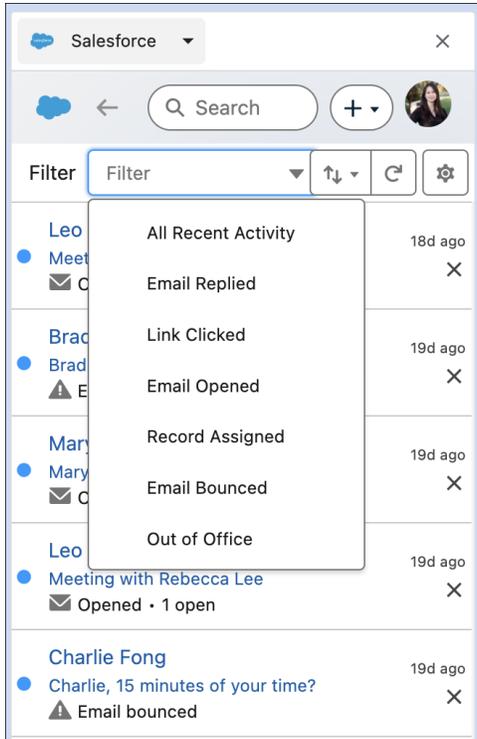
## See Engagement Notifications in Sales Cloud Everywhere

With My Feed in the Salesforce Chrome extension side panel, you can see all your recent engagement alerts while viewing web pages. You can filter on engagement type, review the history of notifications in the feed, and pick the right moment to reach out to a prospect. For example, if you get a notification in the side panel, you can quickly shift your attention to the engaged prospect without switching browser tabs.

### EDITIONS

Available in: Lightning Experience

Available in: **Starter, Enterprise, Performance, Unlimited,** and **Developer** Editions with Sales Cloud



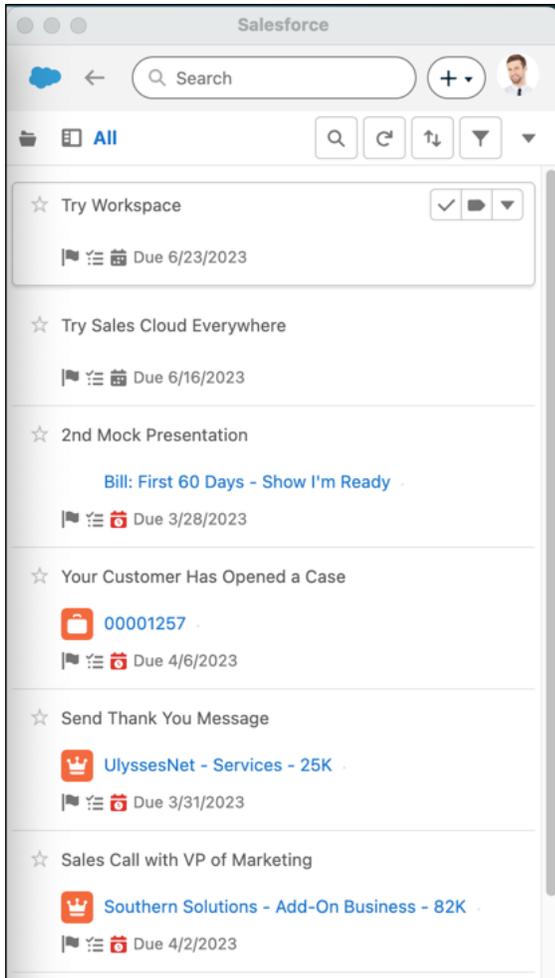
## Work on Your To Do List in Sales Cloud Everywhere

With the To Do List in the Salesforce Chrome extension, you can view, filter, sort, search, and complete your pending tasks within the side panel. You can visit any web page at the same time, letting you view relevant information outside of Salesforce while prioritizing and completing your tasks.

### EDITIONS

Available in: Lightning Experience

Available in: **Starter**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Sales Cloud



SEE ALSO:

[Considerations for Using Workspace in Sales Cloud Everywhere](#)

## Follow Up on Companies and People of Interest in Sales Cloud Everywhere

Easily keep Salesforce up to date while you look for future customers by researching companies and individuals on the internet. Then add a record or update Salesforce with the latest information.

**Important:** Contextual insights is supported in English only.

Contextual insights are part of the Salesforce Chrome extension. Ask your Salesforce admin to enable the extension.

1. Open the extension.
2. If necessary, click **Enable Contextual Insights**.

Salesforce examines the active website.

If the company or person on the website matches a Salesforce account, you can view the details in the Salesforce database. Similarly, if a person on the website matches a Salesforce contact or lead, you see the details in Salesforce.

### EDITIONS

Available in: Lightning Experience

Available in: **Starter, Enterprise, Performance, Unlimited,** and **Developer** Editions with Sales Cloud

If information about a new company or person is found, add it to Salesforce for further follow-up. Or, create an account, lead, or contact from scratch if you want to follow up.

## View and Create Records in Sales Cloud Everywhere

You can view and create records efficiently in the Salesforce Chrome extension side panel while viewing relevant information on the web. For example, when you identify a prospect on a company's web page, you can create the lead record in the extension side panel while viewing the prospect's information on the web.

### EDITIONS

Available in: Lightning Experience

Available in: **Starter, Enterprise, Performance, Unlimited,** and **Developer** Editions with Sales Cloud

The screenshot shows the Salesforce Chrome extension interface. At the top, there's a search bar and a user profile icon. Below that, a form is displayed with the following fields:

- Name:** \* Name (required)
- Salutation:** --None--
- First Name:** Alafia
- Last Name:** \* Last Name (required), Welks
- Title:** Senior Buyer
- Account Name:** Welo
- Email:** awelks@welohightech.com
- Phone:** 415-555-5555

A dropdown menu titled "Salesforce Records" is open, showing the following options:

- New Contact
- New Opportunity
- New Case
- New Lead
- New Event
- New Task

A "Save" button is located at the bottom right of the form.

## Considerations for Working in Sales Cloud Everywhere

As you work in the Salesforce Chrome extension, keep these considerations in mind.

When Salesforce finds an exact match for the company or person you're viewing on a web page, you can give copilot instructions about the current record. Copilot understands that the instructions are for the matching record, so including that information in the instructions isn't necessary.

Dependent fields and dependent lookups aren't supported while editing in the Key Fields section. If they've been added to the compact layout, the dependent values don't respect the restrictions provided by their main field and instead display all possible values.

The default fields in the Key Fields section are the fields on the compact page layout. When editing the key fields, you can add any fields from the full page layout.

State and country picklists aren't supported in the Key Fields section. Instead, enter the exact string value for state and country when adding or updating data in these fields.

Address autocompletion isn't supported in Sales Cloud Everywhere and doesn't appear on record pages in edit mode.

### EDITIONS

Available in: Lightning Experience

Available in: **Starter, Enterprise, Performance, Unlimited,** and **Developer** Editions with Sales Cloud

## Workspace

Access Workspace list experience from the Salesforce Chrome extension side panel. Workspace opens in a new browser tab, where you can personalize your list view to .work with just the records you're interested in. Filter, search, query, and update records directly in each Workspace list.

### [Quickly Update Multiple Records in Sales Cloud Everywhere with Workspace](#)

You can view, sort, query, and edit your latest leads, open opportunities, recently updated contacts, and recently updated accounts in the Workspace list experience. Access Workspace from the Salesforce Chrome extension side panel; it opens in a new browser tab.

### [Filter Records in Workspace](#)

You can view, sort, filter, and edit your leads, opportunities, contacts, and accounts in the Workspace list experience. Set up your workspaces with filters so that you can immediately start working with the relevant records.

### [Considerations for Using Workspace in Sales Cloud Everywhere](#)

See what considerations to know when working in Workspace, part of the Salesforce Chrome extension.

### EDITIONS

Available in: Lightning Experience

Available in: **Starter, Enterprise, Performance, Unlimited,** and **Developer** Editions with Sales Cloud

## Quickly Update Multiple Records in Sales Cloud Everywhere with Workspace

You can view, sort, query, and edit your latest leads, open opportunities, recently updated contacts, and recently updated accounts in the Workspace list experience. Access Workspace from the Salesforce Chrome extension side panel; it opens in a new browser tab.

1. Open workspace from Sales Cloud Everywhere.

### EDITIONS

Available in: Lightning Experience

Available in: **Starter, Enterprise, Performance, Unlimited,** and **Developer** Editions with Sales Cloud

Account ID	Name	Amount	Close Date	Stage
Southern Solutions	Southern Solutions - Add...	\$7,000.00	Feb 28, 2024	Qualification
Allied Technologies	Allied Technologies - New...	\$9,000.00	Feb 27, 2024	Proposal/Quote
Southern Solutions	Southern Solutions - Serv...	\$16,000.00	Jan 6, 2024	Negotiation
Southern Solutions	Southern Solutions - Add...	\$12,000.00	Dec 1, 2023	Qualification
Allied Technologies	Allied Technologies - New...	\$36,260.00	Sep 23, 2023	Proposal/Quote
Southern Solutions	Southern Solutions - Serv...	\$11,000.00	Aug 30, 2023	Qualification
Southern Solutions	Southern Solutions - Add...	\$50,000.00	Aug 29, 2023	Negotiation
Allied Technologies	Allied Technologies - Add...	\$26,000.00	Aug 14, 2023	Discovery
Southern Solutions	Southern Solutions - New...	\$75,000.00	Jun 19, 2023	Proposal/Quote

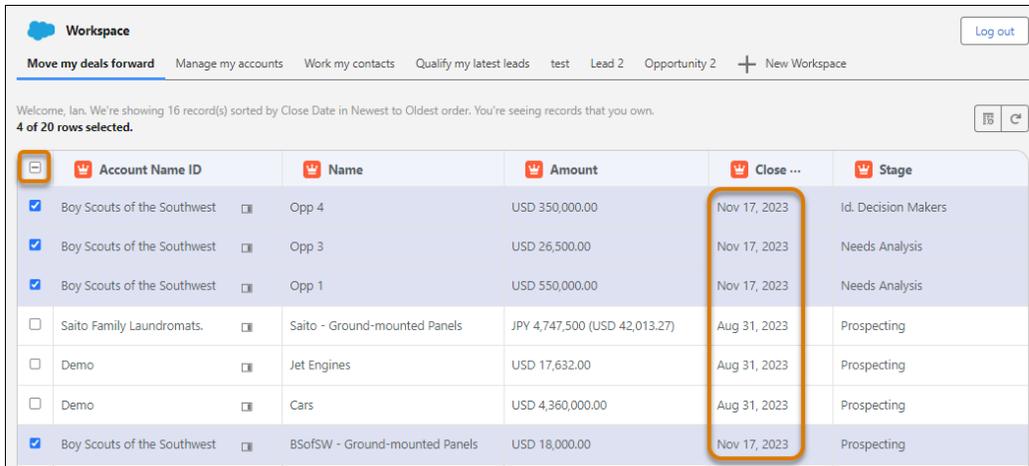
- In your workspace, select up to 20 rows.
- Change the field value in one row and press Enter. The field in every selected row changes to that new value.
- After you're done changing the value, click the unselect icon above the row selection boxes. Unselecting the rows prevents accidental data changes.



**Example:** You want to make the close date the same for all the opportunities. In this example, we chose the four rows for the Boy Scouts of the Southwest account.

Account Name ID	Name	Amount	Close ...	Stage	
<input checked="" type="checkbox"/>	Boy Scouts of the Southwest	Opp 4	USD 350,000.00	Nov 15, 2023	Id. Decision Makers
<input checked="" type="checkbox"/>	Boy Scouts of the Southwest	Opp 3	USD 26,500.00	Oct 3, 2023	Needs Analysis
<input checked="" type="checkbox"/>	Boy Scouts of the Southwest	Opp 1	USD 550,000.00	Nov 2, 2023	Needs Analysis
<input type="checkbox"/>	Saito Family Laundromats.	Saito - Ground-mounted Panels	JPY 4,747,500 (USD 42,013.27)	Aug 31, 2023	Prospecting
<input type="checkbox"/>	Demo	Jet Engines	USD 17,632.00	Aug 31, 2023	Prospecting
<input type="checkbox"/>	Demo	Cars	USD 4,360,000.00	Aug 31, 2023	Prospecting
<input checked="" type="checkbox"/>	Boy Scouts of the Southwest	BSofSW - Ground-mounted Panels	USD 18,000.00	Nov 7, 2023	Prospecting

Change the field value in one row and press Enter. The field in every selected row changes to that new value.



Workspace

Move my deals forward Manage my accounts Work my contacts Qualify my latest leads test Lead 2 Opportunity 2 + New Workspace

Welcome, Ian. We're showing 16 record(s) sorted by Close Date in Newest to Oldest order. You're seeing records that you own.  
4 of 20 rows selected.

	Account Name ID	Name	Amount	Close ...	Stage
<input checked="" type="checkbox"/>	Boy Scouts of the Southwest	Opp 4	USD 350,000.00	Nov 17, 2023	Id. Decision Makers
<input checked="" type="checkbox"/>	Boy Scouts of the Southwest	Opp 3	USD 26,500.00	Nov 17, 2023	Needs Analysis
<input checked="" type="checkbox"/>	Boy Scouts of the Southwest	Opp 1	USD 550,000.00	Nov 17, 2023	Needs Analysis
<input type="checkbox"/>	Saito Family Laundromats.	Saito - Ground-mounted Panels	JPY 4,747,500 (USD 42,013.27)	Aug 31, 2023	Prospecting
<input type="checkbox"/>	Demo	Jet Engines	USD 17,632.00	Aug 31, 2023	Prospecting
<input type="checkbox"/>	Demo	Cars	USD 4,360,000.00	Aug 31, 2023	Prospecting
<input checked="" type="checkbox"/>	Boy Scouts of the Southwest	BSofSW - Ground-mounted Panels	USD 18,000.00	Nov 17, 2023	Prospecting

SEE ALSO:

[Considerations for Using Workspace in Sales Cloud Everywhere](#)

## Filter Records in Workspace

You can view, sort, filter, and edit your leads, opportunities, contacts, and accounts in the Workspace list experience. Set up your workspaces with filters so that you can immediately start working with the relevant records.

Filtering data lets you focus on the records that matter most and keeps your workspace responsive. Workspaces with fewer than 2,000 records work fastest.

Filtering happens in two places in workspace.

- When a workspace opens, filters set in the Manage Workspace window are applied to the records that are retrieved from the database. No matter what filters are used, no more than 2,000 records are displayed.
- In a workspace list view, after the workspace is opened, you can filter the records that are already there, to focus on the data you're interested in. This filtering searches through the records that have already been filtered when the workspace was created.

Filter, search, and update records directly in each Workspace list.

## Filter What's Retrieved From the Database

To determine which records are shown from the database in workspace, click **Manage Workspace**.

### EDITIONS

Available in: **Lightning Experience**

Available in: **Starter, Enterprise, Performance, Unlimited, and Developer** Editions with Sales Cloud

Decide how to filter your records.

- Pick the columns to display (1), so that you can filter and sort on them later.  
Choose columns from opportunity, account, contact, lead, case, contract, and custom entities.
- Decide if you want to see all records you have access to, or just records that you own (2).
- Add filters based on field values (3). For example, you want to see all the records that close on a certain date, or next week. At the bottom of this section you can see the number of records that will be returned, based on the filters you've applied.
- Choose how you want to sort your list of records. (4)

Filters work together to narrow down your records. Therefore, it doesn't matter what order you put the filters in. Some people call this kind of filtering an "AND" filter instead of an "OR" filter.

 **Note:** Note: You can quickly see your workspace's filters in a summary at the top of the workspace.

## Filter Just the Records in Workspace

After records have been retrieved from your database, they appear in the workspace. You can filter your workspace records from the workspace list view. These filters are applied to the records that are already in the workspace only. Adding or changing a filter in a workspace doesn't cause new records to appear. Instead, these filters change which records are visible in a workspace.

For example, let's say that your workspace list contains around 1,700 records. Now you want to find all the records about Amazon.

In the Account ID field, start typing *Am*. Only records whose Account ID starts with "Am" display.

Add additional filters, such as which stage the opportunity is in, to continue narrowing the list of records.

 **Example:** For example, let's say that your workspace list contains around 1,700 records. Now you want to find all the records about Amazon.

<input type="checkbox"/>	Account ID	Stage
<input type="checkbox"/>	Am	
<input type="checkbox"/>	Amazon	Id. Decision Makers
<input type="checkbox"/>	Amazon	Perception Analysis
<input type="checkbox"/>	Amazon	Value Proposition
<input type="checkbox"/>	Amazon	Value Proposition
<input type="checkbox"/>	Amazon	Needs Analysis
<input type="checkbox"/>	Amazon	Value Proposition
<input type="checkbox"/>	Amazon	Prospecting
<input type="checkbox"/>	Amazon	Value Proposition

In the Account ID field, start typing *Am*. Only records whose Account ID starts with “Am” display. Add additional filters, such as which stage the opportunity is in, to continue narrowing the list of records.

<input type="checkbox"/>	Account ID	Stage
<input type="checkbox"/>	Am	Value Proposition
<input type="checkbox"/>	Amazon	Value Proposition
<input type="checkbox"/>	Amazon	Value Proposition
<input type="checkbox"/>	Amazon	Value Proposition
<input type="checkbox"/>	Amazon	Value Proposition

## Considerations for Using Workspace in Sales Cloud Everywhere

See what considerations to know when working in Workspace, part of the Salesforce Chrome extension.

These entities are supported:

- Account
- Contact
- Lead
- Opportunity
- Case
- Contract
- Quote

All custom entities are supported.

Supported field types include:

- String
- Phone
- Email

### EDITIONS

Available in: Lightning Experience

Available in: **Starter, Enterprise, Performance, Unlimited,** and **Developer** Editions with Sales Cloud

- Url
- Boolean
- Currency
- Int
- Double
- Percent
- Date
- DateTime
- Reference
- Picklist
- MultiPicklist
- TextArea

Up to 2,000 records can be displayed. The default sort column and sort order, and the choice to show records that you own or also records you have access to, affects which records are retrieved from the database.

Filtering, sorting, and querying in Workspace is done on the returned records only.

When you delete the last Workspace, the default Workspaces reappear.

Changes are saved when you navigate away from the field.

There's no horizontal scrolling.

There's no text wrapping.

A user can have up to 10 individual workspaces, including the four default workspaces. The default workspaces can be edited and deleted.

Person account data isn't available.

In a workspace, the polymorphic field `OwnerId` supports user identity records only.

## Sales Engagement

Accelerate your inside sales process with a high-productivity workspace. With cadences, managers can create custom sales processes that guide sales reps through handling different types of prospects. Those cadences appear for sales reps in the Work Queue, a task list that appears inside the Sales Console. And with other productivity-boosting features like Sales Dialer, Lead Scoring, and included reports, your sales teams have everything they need to handle prospects in a fraction of the time it took before.

 **Note:** The High Velocity Sales name has changed to Sales Engagement. The automation features within the product now include customer engagement tracking, chatbots, cadences, and automated actions. The new name captures all the tools to use to automate processes and to engage strategically with leads and customers so that your sales team can focus on selling.

### [Set Up Sales Engagement](#)

Use the Setup menu to get the guidance you need for setting up Sales Engagement.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited Editions**, and available for an extra cost in **Professional and Enterprise Editions**. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### [Prospecting Center](#)

Let Prospecting Center find your most qualified customer, using trusted data and AI. Prospecting Center analyzes your CRM and external data and identifies your most promising opportunities with the highest probability of closing, so you know which deals to prioritize. With the power of Data Cloud, you can analyze your accounts, contacts, and leads to identify your most accurate, data-driven prospects.

### [Streamline Prospect Outreach with Cadences](#)

With cadences, inside sales reps can work through their prospects at top speed. Inside sales managers use Sales Engagement Cadence Builder to create consistent, scheduled cadences of outreach activities to help reps nurture their prospects with maximum efficiency. A cadence can include activities like sending emails, making calls, arranging meetings, and sending text messages. Sales managers and reps can add leads, contacts, and person accounts to each cadence. Sales reps act on the cadence activities from a prioritized work queue that shows them at a glance which prospects are ready for each outreach.

### [Sell Faster with Sales Engagement](#)

Understand how the Lightning Sales Console, Work Queue, Sales Dialer, Quick Cadences, Automated Actions, and other Sales Engagement features work together to help accelerate your sales.

### [Analyze Sales Engagement Performance with Reports and Dashboards](#)

Sales Engagement includes a set of standard reports and custom report types to show you the productivity and effectiveness of your cadences and reps. See even more detail with the Sales Engagement Performance Dashboards, powered by CRM Analytics.

### [Adding Automation to Sales Engagement](#)

Save time and improve consistency by adding automation to your Sales Engagement activities. Choose from a range of automation tools and templates that fit a variety of automation use cases, such as automated actions, cadence screen flows, and cadence autolaunched flows. You can also use platform automation tools such as Flow Builder, Apex, and APIs to automate how cadences work with leads, contacts, and person accounts.

### [Automate Sales Outreach with a Buyer Assistant](#)

Generate leads, deliver personalized conversations, and close deals faster with a buyer assistant. Buyer Assistant bots transform the web-to-lead experience and help your sales team sell more. Each buyer assistant includes CRM-powered dialogs and automation flows that help it to connect with customers. A buyer assistant can pitch your products' value after business hours, notify relevant team members when a customer is chatting, intelligently route leads to your sales team, and schedule customer meetings for your sales team. After creating a buyer assistant bot, you can personalize the conversation experience and adjust the built-in flows to meet your business needs. Get your buyer assistant up and running quickly using the guided onboarding experience.

## Set Up Sales Engagement

Use the Setup menu to get the guidance you need for setting up Sales Engagement.

 **Note:** The High Velocity Sales name has changed to Sales Engagement. The automation features within the product now include customer engagement tracking, chatbots, cadences, and automated actions. The new name captures all the tools to use to automate processes and to engage strategically with leads and customers so that your sales team can focus on selling.

Set up Sales Engagement in four high-level steps.

1. Enable Sales Engagement and configure Einstein Activity Capture.
2. Assign relevant permission sets.
3. Configure features that are relevant for your company.
4. Let sales managers and reps know how to start using Sales Engagement.

### Considerations for Setting Up Sales Engagement

Before setting up Sales Engagement, consider these requirements, limitations, and nuances for each feature.

#### Turn On Sales Engagement Features

Enable Sales Engagement and specific features in Setup.

#### Sales Engagement and Inbox Features

Inbox features are included in Sales Cloud, but some Einstein Activity Capture features aren't available in Professional and Enterprise Editions. Users with Professional and Enterprise Editions have access to Einstein Activity Capture Standard.

#### Turn on Automated Actions

To let your sales team build their own processes to manage cadence targets they own with simple if-this-then-that logic, turn on Automated Actions

#### Assign Permission Sets for Sales Engagement Users

Assign the permission sets for Sales Engagement. Also assign permission sets for optional features that are new to your Salesforce org, including Sales Dialer. You can also assign the permission set for full access to CRM Analytics dashboards.

#### Configure Sales Engagement Features

Set up Sales Dialer and Einstein Lead Scoring if they're new to your org. And make sure that you configure all other relevant features to get the most out of Sales Engagement.

#### Set Up an Optional Sales Prospecting Bot

Admins can enable an optional Einstein Bot for Sales Engagement. Build and manage a Sales Prospecting Bot to ease the load on your sales reps. Bots can handle information collection and answer frequently asked questions so sales reps can spend their time on more complex tasks.

#### Start Using the Sales Engagement App

With Sales Engagement set up, your sales managers and reps can start using the app by creating cadences and adding prospects to them.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To set up Sales Engagement:

- Customize Application AND Modify All Data

## Considerations for Setting Up Sales Engagement

Before setting up Sales Engagement, consider these requirements, limitations, and nuances for each feature.

 **Note:** The High Velocity Sales name has changed to Sales Engagement. The automation features within the product now include customer engagement tracking, chatbots, cadences, and automated actions. The new name captures all the tools to use to automate processes and to engage strategically with leads and customers so that your sales team can focus on selling.

### [General Considerations for Sales Engagement](#)

Learn about general considerations for setting up Sales Engagement.

### [Einstein Activity Capture Considerations for Sales Engagement](#)

Learn about general considerations for setting up Sales Engagement.

### [Email Considerations for Sales Engagement](#)

Learn about email considerations for setting up Sales Engagement.

### [Engagement and Alerts Considerations for Sales Engagement](#)

Learn about engagement and alerts considerations for setting up Sales Engagement.

### [Work Queue Considerations in Sales Engagement](#)

Learn about considerations for using the Work Queue in Sales Engagement.

### [Cadence Considerations for Sales Engagement](#)

Learn about considerations for using cadences in Sales Engagement.

### [Lead Scoring Considerations for Sales Engagement](#)

Learn about considerations for using lead scoring in Sales Engagement.

### [Phone Integration Considerations for Sales Engagement](#)

Learn about considerations for each phone integration option for Sales Engagement.

### [Sales Dialer Considerations for Sales Engagement](#)

Learn about considerations for using Sales Dialer with Sales Engagement.

### [Einstein Conversation Insights Considerations for Sales Engagement](#)

Learn about considerations for using Einstein Conversation Insights with Sales Engagement.

#### SEE ALSO:

[Mass Email Limitations](#)

#### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

## General Considerations for Sales Engagement

Learn about general considerations for setting up Sales Engagement.

### General Considerations

- Enhanced Email must be enabled.
- No support in Experience Cloud sites.
- Sales Engagement supports lead, contact, and person account records.
- Inbox and Einstein Lead Scoring are included with Sales Engagement.
- Sales Dialer is available for an extra cost as an add-on license.
- Sales Engagement can be deployed in scratch orgs, but the settings for the feature can't be updated through the scratch org definition file. Instead, configure settings directly in the Sales Engagement app.
- Sales Engagement is supported in sandbox orgs. If you're creating a sandbox from a production org that has Sales Engagement enabled, you must enable the product in Setup again. It's disabled in the sandbox org by default.
- Some Sales Engagement features, such as Salesforce Inbox, require that users have Microsoft® Exchange or Gmail™ accounts.
- Turning on and using Sales Engagement in Government Cloud and Government Cloud Plus organizations may send data outside the authorization boundary. For more information, please contact your account executive.
- Sales Engagement included in Sales Cloud Unlimited Edition provides analytics reporting using the CRM Analytics platform. When using this functionality, your license doesn't allow you to:
  - Build custom analytics apps or dashboards
  - Upload, access, or connect external data using the API with the exception of datasets provided with Sales Cloud Einstein
  - Import data from Salesforce standard or custom objects that aren't included in this feature

#### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### User Permissions

Salesforce Admin or User Task	Preferences and Permissions Required
Set up Sales Engagement	Customize Application, Modify All Data, Assign Permission Sets, and Manage Users
Use Sales Engagement	Convert Leads, Send Email, Edit Tasks, and Sales Engagement User, Sales Engagement User Included, Sales Engagement Cadence Creator, or Sales Engagement Cadence Creator Included permission set
Create cadences	Sales Engagement Cadence Creator or Sales Engagement Cadence Creator Included permission set
Manage the Activities dashboard and Lead Score dashboard	Analytics for Sales Cloud license (three permission sets included)
View the Analytics Sales Engagement Performance Dashboards	Sales Engagement User, Sales Engagement User Included, Sales Engagement Cadence Creator, or Sales Engagement Cadence Creator Included permission set

Salesforce Admin or User Task	Preferences and Permissions Required
Use Dialer	Dialer Inbound, Dialer Outbound, and Dialer Minutes permission sets
Create email templates for cadences	Manage Public Lightning Email Templates
Create cadence folders	Sales Engagement Cadence Creator or Sales Engagement Cadence Creator Included permission set
Edit and manage private cadence folders	Sales Engagement Cadence Creator or Sales Engagement Cadence Creator Included permission set
View shared cadence folders	Sales Engagement User, Sales Engagement User Included, Sales Engagement Cadence Creator, or Sales Engagement Cadence Creator Included permission set, plus view access to the shared folder
Edit shared cadence folders	Sales Engagement User, Sales Engagement User Included, Sales Engagement Cadence Creator, or Sales Engagement Cadence Creator Included permission set, plus edit or manage access to the shared folder
Manage other users' access to shared cadence folders	Sales Engagement User, Sales Engagement User Included, Sales Engagement Cadence Creator, or Sales Engagement Cadence Creator Included permission set, plus manage access to the shared folder
Create a quick cadence	Sales Engagement Basic permission set

## Einstein Activity Capture Considerations for Sales Engagement

Learn about general considerations for setting up Sales Engagement.

### Einstein Activity Capture

- Depending on which authentication method you use to connect Salesforce to your email and calendar application, Einstein Activity Capture users are prompted to [connect their email and calendar to Salesforce](#) or accept terms of service.
- To connect an account, Einstein Activity Capture users who don't use Inbox must be in an active configuration.
- To capture emails and events, Einstein Activity Capture users must be in an active configuration. If you started using Einstein Activity Capture before Summer '23, users can capture emails and events without being in a configuration.
- Turning on Einstein Activity Capture in Government Cloud and Government Cloud Plus organizations can send data outside the authorization boundary. Contact your Salesforce account executive for more details.
- For events and contacts to sync, the connected email account must be the user's primary account (the email account on their Salesforce user record). It must not be an email alias, and it must be in the user principal name (UPN) format.
- Einstein Activity Capture works with all Salesforce-supported languages. But only ASCII characters are supported in email addresses.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance**, **Einstein 1**, and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

- Einstein Activity Capture users can't delete emails that Einstein Activity Capture adds to Salesforce. Admins can [delete past emails and events](#) that include a specific person based on their email address or username.
- If you use Salesforce Essentials Email-to-Case, make sure that the email address you use to connect to Salesforce is different from the one that you use to connect Einstein Activity Capture to Salesforce.
- You can't use Einstein Activity Capture and Lightning Sync at the same time.
- If using Lightning Sync or a version of Einstein Activity Capture without sync, we remove old configurations and settings before you create an Einstein Activity Capture configuration.
- When opportunities have no overdue tasks and Einstein Activity Capture is enabled, the alerts on Opportunity Kanban aren't shown.
- Einstein Activity Capture included in Sales Cloud Unlimited Edition provides analytics reporting using the CRM Analytics platform. When using this functionality, your license doesn't allow you to:
  - Build custom analytics apps or dashboards
  - Upload, access, or connect external data using the API with the exception of datasets provided with Sales Cloud Einstein
  - Import data from Salesforce standard or custom objects that aren't included in this feature
- Contact sync doesn't support Outlook categories, so contacts labeled with a Salesforce\_Sync category that don't exist in a contacts subfolder of the same name don't sync with Salesforce. To avoid this issue, disable contact categories and select the Salesforce\_Sync folder for new contacts in Outlook. See [EAC - New Contacts Created In Outlook with 'Salesforce\\_Sync' Category Do Not Sync to Salesforce](#).
- Activities that are captured by Einstein Activity Capture aren't stored in Salesforce, so they don't show up in standard Salesforce reports. Use the [Activities dashboard](#) to see a summary of sales activities that were added to Salesforce manually and by Einstein Activity Capture. You can also use [Activity Metrics](#) to get a complete picture of your activities.
- When Einstein Activity Capture is disabled, email tracking isn't displayed in Lightning Experience for emails sent from the Outlook or Gmail integration that aren't part of a cadence.
- To stop capturing the emails of a specific user, add them to an Einstein Activity Capture configuration with emails disabled. Sales Engagement permission sets have the "Use Inbox" permission enabled by default. Users with the "Use Inbox" permission enabled can't be in a configuration that has email disabled because some Inbox features require email data. You can clone one of the standard Sales Engagement permission sets, disable the "Use Inbox" permission, and enable the "Use Einstein Activity Capture" permission. Then, assign the permission set to users whose emails you don't want captured. Add those users to a configuration that has emails disabled.

## Email Considerations for Sales Engagement

Learn about email considerations for setting up Sales Engagement.

### Email in Sales Cadences

Automated emails are set up as a cadence step.

- When automated emails are sent through Salesforce, they have a daily org limit that is typically set to 5,000. For more information about this limit, see [List Email Limitations](#). To increase the limit, [contact Salesforce Customer Support](#).
- When automated emails are sent through external services, such as Office 365 or Gmail, they don't count toward your org's daily email limit.

We recommend that customers send automated email through external services.

- Reps with the complete Sales Engagement permission can send up to 1,000 automated emails a day. Reps with the Sales Engagement Basic permission can send up to 100 automated emails a day.
- There isn't a limit to the number of users who can send automated emails.
- List emails don't count towards the daily automated email limit for each user.
- Email templates used in cadences must be accessible to the sales rep. Store them in the public folder.
- Email templates used in cadences must have a blank Related Entity Type value and can only use merge fields for Sender, Recipient, or Organization.
- If an email is scheduled from a cadence, and the contact is either removed from the cadence or moved to another cadence, the scheduled email isn't sent. The cadence step returns to an active state. The draft email is deleted and no longer appears on the Scheduled Emails component.
- When scheduling an email to send later, use a Classic text email template, a Lightning email template, or an Email Template Builder email template.

### Email Tracking

- Email tracking is optional in Sales Engagement. To use tracking, enable Make Inbox Available to Users in Setup and assign an Inbox permission set to users. Then turn on email tracking in Sales Engagement. We recommend turning on the Email Tracking option in Sales Engagement before creating cadences.
- If you turn email tracking off in Sales Engagement, listener actions for email engagements aren't available to add to cadences. Active cadences that contain listener actions for email engagements no longer advance through those steps automatically.
- If you turn email tracking off in Sales Engagement, email tracking is also off for all email sent from Lightning Experience. If you turn off Enable Email Tracking in Activity Settings in Salesforce setup, you also turn off email tracking for emails started from the Work Queue in Sales Engagement.
- If you turn email tracking off in Sales Engagement and your sales reps use the Work Queue in Outlook or Gmail, we recommend turning email tracking off in the integrations. To disable email tracking in the Outlook and Gmail integrations, turn off the Email Tracking option on the Inbox Setup Assistant page in Setup.

#### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

## Integration with Outlook and Gmail

- The Work Queue isn't always included in the email integration pane by default when Sales Engagement is enabled. If you've already created a custom pane, or edited default email panes, add the Work Queue component using the Lightning App Builder. Then assign the pane to the user profiles of users who use the Work Queue.
- The My Feed tab in the Work Queue shows engagements and alerts for emails sent from the Work Queue and tracked emails sent from outside the Work Queue. That information is also shown in the Feed tab in the email integration pane. To prevent duplicate feeds for reps who use the Work Queue, use the Lightning App Builder to remove the Feed tab from the email integration pane. Assign that custom pane to Sales Engagement users.
- In the Outlook integration, if a user deletes the Email to Salesforce address (the BCC address) or removes the tracking information from the email body, the email can't be tracked.
- If you turn email tracking off in Sales Engagement and your sales reps also use the Work Queue in Outlook or Gmail, we recommend also turning email tracking off for the integrations. To disable email tracking in the integrations, turn off the Email Tracking option on the Inbox Setup Assistant page in Setup.
- Attachments in email templates aren't supported in the Outlook or Gmail integrations. The template text inserts without the attachment.
- Emails sent from the Work Queue in Outlook or Gmail can bypass Email Opt Out or individual privacy preferences set in Salesforce. Salesforce displays customers' email privacy settings, but it's up to sales reps to respect these preferences.
- In Outlook on the web, there are limitations to how emails are threaded if reps reply to or forward an email that's been logged to Salesforce from the Outlook Sent Items folder. If the sent email is part of an email thread, but isn't part of a previous cadence step, then the email isn't included in the thread. In this case, if the last email in the thread is the sent email, that email isn't considered the most recent in the thread.
- Making calls isn't supported in the Work Queue in the Outlook or Gmail integrations.
- Emails sent from the Outlook or Gmail integrations initially show as In Progress in the Work Queue.

### SEE ALSO:

[Considerations for Tracking Emails Sent from Salesforce Inbox](#)

[Turn On Salesforce Inbox](#)

[Select Who Can Use Inbox Features](#)

## Engagement and Alerts Considerations for Sales Engagement

Learn about engagement and alerts considerations for setting up Sales Engagement.

### Engagement and Alerts

- Alerts appear in the My Feed tab for 30 days. If an email open, reply, or link click occurs within 90 days of when an email was sent, a new alert appears.
- If you're using Einstein Activity Capture, email open, reply, and link click alerts appear for emails sent to excluded email addresses. These emails and their related alerts are visible only to the email sender.
- Deleting leads, contacts, emails, or email templates doesn't delete their related alerts.
- If multiple users connect the same mail account to Einstein Activity Capture, email reply alerts don't appear for that account.
- Email reply alerts appear only for Einstein Activity Capture users.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

- For emails that aren't logged or are logged after they're sent, open and link click alerts appear in My Feed. However, users can't click these alerts to view the email content.
- When cadence emails are sent to cadence targets, with other recipients added, alerts appear in My Feed only for cadence targets.
- Clicking email reply alerts in My Feed opens the email in a new console tab.
- The My Feed tab loads more alerts in groups of 15 when you scroll. While alerts load, if new alerts occur an out-of-sync message can appear. To sync the tab, click **Refresh**.
- When a new engagement occurs, it can take from 3–10 minutes for the My Feed tab to prompt the user to refresh.
- When an email hard bounce occurs, it can take up to 10 minutes for the alert to appear.
- When an email has multiple recipients, replies, soft and hard bounces, and out-of-office replies are tracked for each email recipient. Email opens and link clicks are still tracked per email sent, and not per recipient.
- Engagement data is available in the Sales Engagement component for emails and calls made in December, 2020 and later.

## Work Queue Considerations in Sales Engagement

Learn about considerations for using the Work Queue in Sales Engagement.

### Work Queue Considerations

- The Work Queue is supported only in the split view in Lightning Console and in the Outlook and Gmail integrations.
- The Work Queue can show up to 1,000 prospects that belong to cadences at a time.
- If you change a cadence name, the new name doesn't appear in the Work Queue for currently pending steps. A workaround is to remove the cadence from the Work Queue view and then add it again.

## Cadence Considerations for Sales Engagement

Learn about considerations for using cadences in Sales Engagement.

### Cadences

- Only leads, contacts, and person accounts are supported in cadences.
- Before merging duplicate records, be sure none of the records you're deleting are in a cadence.
- Tasks related to cadence steps are created and updated automatically. Users can't edit these tasks, but they can delete them after the cadence step has been completed.
- The maximum number of steps in a cadence is 100.
- The maximum length of a wait step is 60 days.
- You can add up to 200 targets to a cadence at once, except when adding them from an opportunity. You can add only 20 opportunity contacts to a cadence at one time.
- When a lead converts, completed cadence tasks aren't transferred to the Activity Timeline of the new contact, account, or opportunity.

#### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited Editions**, and available for an extra cost in **Professional and Enterprise Editions**. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

#### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited Editions**, and available for an extra cost in **Professional and Enterprise Editions**. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

- Before managers can create branched cadences based on call outcomes, an admin must map your org's call result values in Sales Engagement Setup.
- When pre-defining an email template for a cadence step, you can only use Lightning email templates.
- Users can't add targets when the cadence has an automated email as the first step and the number of targets will cause them to exceed their daily limit of automated email.
- The limit of active cadence targets is 500,000 per Salesforce org. If your usage exceeds this amount, please contact your Salesforce Account Executive for pricing.
- The Cadence field shouldn't be used on lead, contact, or account search layouts in Lightning Experience and Salesforce Classic, or on list views in Salesforce Classic.
- The Cadence and Cadence Assignee fields on lead, contact, and person account records can't be used as field criteria in workflow rules and Process Builder.
- Cadence step trackers don't support triggers, but you can use triggers on the related task records as a substitute.
- For these cadence step types, the system creates a task record. Users can't edit these records directly. The task records are marked complete when the user completes the related cadence step. There can be a slight delay between when the user completes the step and the task record is updated.
  - Send an email
  - Make a call
  - Create a task
  - Send an automated email
  - LinkedIn InMail
  - LinkedIn connection request
  - Platform screen flow

### Cadence Folders and Sharing

- To grant access to cadences, share the folder, not the cadence itself.
- If a user loses access to a cadence folder, they lose access to all cadences in that folder.
- If a user loses access to a cadence, the user can't complete any in-progress steps from that cadence.
- Access to a cadence folder doesn't grant access to email templates used in that cadence. Email templates used in cadences must be stored in folders accessible to the cadence target assignee.
- CRM Analytics dashboards display all cadence metrics regardless of whether the user has access to the cadence.
- To ensure that your users can access cadence folders, make sure that the Enable Enhanced Folder Sharing for Reports and Dashboards critical update is activated in Setup.

## Lead Scoring Considerations for Sales Engagement

Learn about considerations for using lead scoring in Sales Engagement.

### Einstein Lead Scoring

- Encourage reps to add as much data to their leads as possible. When leads have more data, Einstein Lead Scoring generates better insights.
- Reps must have read access to the Company, Phone, and Email fields on leads.
- Don't install Apex classes that reference the ScoreIntelligence field until after you enable Einstein Lead Scoring and receive the notification that enablement is complete. Otherwise, references to the ScoreIntelligence field are invalid.
- Einstein does not use encrypted lead fields in lead score analysis. When you turn encryption on or off for a field, Einstein includes the change in the next analysis. Einstein reanalyzes your leads approximately every 10 days.
- If you have over a million scored leads, the Einstein Lead Scoring Analytics app can stop working. The exact number depends on your org's configuration.
- If you turned on Einstein Lead Scoring in Spring '20 or earlier, you no longer need the Lead filter in the Einstein Lead Scoring Analytics app. To remove the filter, open the Data Manager in Analytics Studio and then click **Connect**. Click **Lead**, then **Continue**. Remove the ScoreIntelligence.Score >= 0 filter text and save your changes.

### Third-Party Lead Scores

- If Einstein Lead Scoring is set up, leads are sorted by Einstein Lead Scores unless you have also configured a third-party lead scoring solution.
- For person accounts, custom number fields that relate to third-party scores can be configured in the object setup for contacts.

## Phone Integration Considerations for Sales Engagement

Learn about considerations for each phone integration option for Sales Engagement.

### Sales Dialer

When you use Sales Dialer with Sales Engagement, these features are available:

- Automatic voice connectivity
- Click to dial for call steps from the Work Queue and My List
- Task logging
- Cadences advance automatically when calls are completed
- Cadence branching based on call result
- Automatic target exit from cadence based on call result
- Einstein Conversation Intelligence

### Service Cloud Voice

When you use Service Cloud Voice with Sales Engagement, these features are available:

- Automatic voice connectivity
- Click to dial for call steps from the Work Queue and My List

#### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

#### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

- Task logging
- Cadences advance automatically when calls are completed
- Cadence branching based on call result
- Automatic target exit from cadence based on call result
- Einstein Conversation Intelligence

## Open CTI and Sales Engagement

Partner solutions approved by Salesforce are listed on the [AppExchange](#). More information about each third-party integration option is available on its partner solution page.

Sales Engagement can support third-party computer telephony integration (CTI) providers if you're using Open CTI for Lightning Experience. For the best user experience, we highly recommend third-party providers use the available Open CTI methods for Sales Engagement. More information about these methods is available in the [Salesforce Open CTI Developer's Guide](#).

You can use your third-party Open CTI solution with Sales Engagement if:

- Your Salesforce org is using Open CTI for Lightning Experience.
- Your CTI solution uses click-to-dial.
- The saveLog() Open CTI method is used to save a task with a call task type on the related record after the call.

With these requirements, your Open CTI solution can work with Sales Engagement. We highly recommend contacting to your CTI provider in order to implement the best user experience.

To create the best experience, your CTI provider can integrate the Open CTI methods for Sales Engagement. When a third-party CTI solution doesn't use these methods, some features aren't available:

Feature	Available without Sales Engagement CTI Methods?
Click-to-dial	Yes
Task logging	Yes, only if implemented by the CTI solution
Cadence advancement based on call completion	No
Cadence branching based on call result	No
Automatic target exit from cadence based on call result	No

In addition, when providers don't use the Open CTI methods, some details are lost.

- For cadences, the cadence doesn't move to the next step when the sales rep logs the call task. Sales reps must manually complete the step to advance the cadence.
- In My List, the call is removed from the list as soon as the sales rep clicks **Call**, even if the call isn't answered.

Einstein Conversation Intelligence can't be used without Open CTI, except with a custom integration. For more information about this option, contact Salesforce Support.

SEE ALSO:

[Use Service Cloud Voice with Sales Engagement](#)

## Sales Dialer Considerations for Sales Engagement

Learn about considerations for using Sales Dialer with Sales Engagement.

### Sales Dialer

- Dialer features are available in Lightning Experience on the desktop only.
- No support in Experience Cloud sites.
- Users can now store up to 20 voicemail messages in Salesforce. Voicemail messages are limited to two minutes. The messages are saved as files in Salesforce, and they count toward your files storage quota.
- Call Monitoring is not supported in Salesforce Essentials.
- Outgoing calls are supported to the U.S. and Canada only. Puerto Rico is not supported.
- The Local Presence feature is only available in the U.S. and isn't available in Canada.
- Permission set groups aren't supported for Dialer permissions. Assign Dialer and Call Monitoring permission sets without using permission set groups.
- Dialer users can't have Service Cloud Voice permission sets or be part of a Salesforce call center.
- Phone numbers in dashboards can't be directly called with Dialer.
- The utility bar supports only one Phone item at a time.
- Users can't pop out (or pop in) the call panel from the utility bar during an active call.
- When users call a landline number that's busy, Dialer ends the call without ringing or a busy signal.
- Deactivated call result values aren't removed from the call panel. Delete any unneeded call result values instead.
- Users need the "Edit Task" permission to log calls. This permission isn't automatically included with some profiles, so users with those profiles can make calls, but those calls aren't logged.
- Users need a Dialer Inbound license to assign a number or access personal Dialer settings from the call panel.
- If you're creating a sandbox from an org that already has voice calls, voice call records and voice call recordings are not copied over. To use Dialer in sandbox, you must enable it from Setup again.
- It isn't possible to make or receive live calls with Dialer in sandbox environments. You can make test calls and test automation that occurs after a call is made, such as the log a call task. For more details, see "Test Dialer Features in Sandbox."
- The records that can be added to call lists include leads, accounts, person accounts, and contacts. Call lists use the standard Phone field for these records.
- To use voicemail greetings, password protection can't be required by default for content deliveries. From Setup, enter Content Deliveries in the Quick Find box, then select Content Deliveries. Ensure that Password protection is required is not selected. This feature is available only to users with outbound and inbound calling access.
- Dialer users with the voicemail drop feature can store up to 10 prerecorded voicemail messages.
- With call monitoring, you can listen to only one sales rep at a time, and only outbound calls are monitored. You can't monitor calls that your sales reps receive. Monitored calls use double the minutes of a regular call, counting the call time for both the rep and manager.
- Dialer respects the **Do Not Call** field, and records with the field selected have one-click calling disabled.
- Call recordings are saved as files in Salesforce. An hour of recording takes up roughly 15 MB of storage space, and the same sharing rules apply to recordings as other files in Salesforce. Admins can delete call recordings from the Recording Management page in Setup.
- If required by law, users must notify the call recipient of call monitoring and/or recording and stop monitoring and/or recording upon request.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

- Dialer doesn't support Enhanced 911. Location information is not automatically shared over 911 calls.
- You can use Sales Dialer to make calls to or receive calls from the U.S. and Canada only.
- 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.
- Before a user can use a custom phone number, the user must enter a provided code to verify it. Phone numbers that use a directory can't be verified.
- The same custom phone number can't be used for multiple users.
- Phone numbers provided by Salesforce can be used only in association with Sales Dialer.
- If your org enabled Sales Engagement before Dialer, add the Phone item to the utility bar for the Sales Engagement app to use the feature. Orgs that already enabled Dialer have the item added to the utility bar automatically.
- Sales Engagement users can't access the Call List feature from the call panel. This feature becomes part of the My List experience in Work Queue.
- To advance a cadence to the next step after a call, the call must be logged.

## Einstein Conversation Insights Considerations for Sales Engagement

Learn about considerations for using Einstein Conversation Insights with Sales Engagement.

### Einstein Conversation Insights

- Speaker identification can be based on call metadata provided by the vendor or the use of machine learning models. Transcript accuracy and speaker identification are not always accurate if incorrect information is received from the vendor or the machine learning model results are not accurate. We're continually working to improve the quality of the speaker data. We recommend turning on [Optimal Speaker Separation](#) to help improve the quality of transcripts and insights.
- To see transcripts from Zoom meetings, enable the Cloud recording and transcript features in Zoom in advance. After enabling the feature in Zoom, it can take some time before transcripts are available in Salesforce.
- Orgs can have up to 100 custom insights. Each insight can have a maximum of 25 keywords, with each keyword limited to 255 characters.
- The opportunity amount filter doesn't support the currency format or decimals. When entering a new value in the opportunity amount filter, tab out of the widget to update the dashboard with your changes.
- If your org is using Opportunity Matching, the user placing the call needs access to the related opportunity for it to be matched for voice calls. User access isn't required for opportunity matching with video calls.
- In order for the video integration to work, the email address of the connected video account must match the email address used to log into Salesforce.
- To delete video call records, the Modify All Data permission is required.
- Search functionality within a transcript is not currently supported.

### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise**, **Performance**, and **Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

## Turn On Sales Engagement Features

Enable Sales Engagement and specific features in Setup.

-  **Note:** The High Velocity Sales name has changed to Sales Engagement. The automation features within the product now include customer engagement tracking, chatbots, cadences, and automated actions. The new name captures all the tools to use to automate processes and to engage strategically with leads and customers so that your sales team can focus on selling.

Turning on and using Sales Engagement in Government Cloud and Government Cloud Plus organizations may send data outside the authorization boundary. For more information, please contact your account executive.

-  **Note:** Some features included in Sales Cloud are set up through Sales Engagement.

1. From Setup, enter *Sales Engagement* in the Quick Find box, and then select **Sales Engagement Settings**.
2. Click the **Automate** tab.
3. To turn on Sales Engagement, click the toggle.

Turning on Sales Engagement automatically enables these features.

- **Enhanced Email**—In the Cadence Settings section of the Automate tab, this setting lets you 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 an improved email detail page that shows emails in their original format.
- **Email Tracking**—In the Cadence Settings section of the Automate tab, this setting allows tracking of email opens, link clicks, and replies.
- **Einstein Activity Capture**—In the Guide tab, this setting lets you keep data between Salesforce and your email and calendar applications up to date, including emails, events, and contacts.
- **Automated Email**—In the Cadence Settings section of the Automate tab, this setting lets cadence creators include email steps that send the email automatically using a template.
- **Use LinkedIn Sales Navigator with Cadences**—In the Cadence Settings section of the Automate tab, this setting lets sales managers add LinkedIn InMail and Connection Request steps to cadences if you have the native integration of LinkedIn Sales Navigator enabled.
- **Skip Weekends**—In the Cadence Settings section of the Automate tab, this setting assigns cadence tasks to reps on weekdays only. Calls, emails, and custom steps aren't assigned on Saturday or Sunday. When Skip Weekends is on, wait steps in cadences don't complete on weekends. Action steps that follow a wait step, including auto emails, don't come due until after the weekend.
- **Allow Email Template and Call Script Variant Testing in Cadences**—In the Cadence Settings section of the Automate tab, this setting lets sales managers try out different versions of an email template or call script on a single cadence step. On cadence records, they can compare the engagement results of each variant.
- **Change Cadence Target Assignees**—In the Cadence Settings section of the Automate tab, this setting lets users update the who is assigned to work a target through a cadence. If you want to prevent this feature from being available to all Sales Engagement users, you can optionally turn on Limit Who Can Change Target Assignees. Then assign the Change Cadence Target Assignees permission to the users who need it.
- **Relate Opportunities to Cadences**—In the Cadence Settings section of the Automate tab, this setting lets your sales team associate opportunities with cadence targets so they can track which opportunities result from each cadence.
- **Assign Targets to Multiple Cadences**—In the Cadence Settings section of the Automate tab, this setting lets users add the same target to up to five cadences. If you turn off this feature, existing targets remain in their cadences, but new targets can't be added

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited Editions**, and available for an extra cost in **Professional and Enterprise Editions**. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To set up Sales Engagement:

- **Customize Application AND Modify All Data**

to more than one cadence. The Total Cadences field on lead, contact, and person account list views shows how many cadences each prospect is assigned to.

**4.** From Setup, enter *Sales Engagement* in the Quick Find box, and then select **Automated Actions**.

To let your sales team build their own processes to manage cadence targets they own with simple if-this-then-that logic, turn on **Allow users to create automated actions**. Then adjust Sharing settings and permissions to let users and managers create automated actions.

You can turn off features that aren't required after enabling Sales Engagement, but we recommend keeping them on to get the most out of the product.

These Sales Engagement features aren't enabled by default. Turn them on if they're appropriate to your business.

- **User Cadence Assignment Availability**—In the Cadence Settings section of the Automate tab, this setting lets your Sales Engagement users choose when cadence tasks are assigned to them and appear in their To Do List and Work Queue. By setting their Cadence Assignment Availability in their profile, users have more control over their work and prevent cadence tasks from becoming overdue during times when they don't plan to work on cadences. Cadence step tasks for targets they own are only added during those hours. Tell users to add their available hours in the Cadence Settings section of their user profile.
- **Always show Salesforce Log a Call Window**—In the Cadence Call Settings section of the Call tab, this setting makes the Salesforce version of the Log a Call window appear at the start of each call, even if you use a third-party CTI solution. If you prefer to use the Log a Call window from your CTI solution, don't turn on this setting.
- **Log Tasks from LinkedIn Steps**—In the Cadence Settings section of the Automate tab, this setting lets Salesforce log tasks from LinkedIn cadence steps. This setting is recommended unless you use Activity Write Back from LinkedIn to log LinkedIn tasks.

SEE ALSO:

[Use Enhanced Email for More Email Functionality](#)

## Sales Engagement and Inbox Features

Inbox features are included in Sales Cloud, but some Einstein Activity Capture features aren't available in Professional and Enterprise Editions. Users with Professional and Enterprise Editions have access to Einstein Activity Capture Standard.

Feature	Professional and Enterprise Editions	Performance and Unlimited Editions
Quick cadences	✔	✔
Automatic email (from a cadence)	✔	✔
Email tracking when an email and its attachment have opened	✔	✔
Add an individual meeting link to an email	✔	✔
Insert your meeting availability into an email	✔	✔

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1,** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Feature	Professional and Enterprise Editions	Performance and Unlimited Editions
Suggest 3 future meeting times in an email	✓	✓
Schedule when to automatically send an email	✓	✓
Text shortcuts	✓	✓
Standard multi-step cadences	✗	✓
Automated actions	✗	✓
Einstein Conversation Insights	✗	✓

## Turn on Automated Actions

To let your sales team build their own processes to manage cadence targets they own with simple if-this-then-that logic, turn on Automated Actions

Automated actions let reps and managers save time by automating common cadence target-related tasks with processes that manage cadence targets and associated records they own. With simple if-this-then-that logic, they can automatically add, remove, pause, or resume cadence targets and change target assignees based on criteria they choose. Managers can also create automated actions for their subordinates.

1. From Setup, enter *Automated Actions* in the Quick Find box, and then select **Automated Actions**.
2. To let Sales Engagement users create actions for themselves, turn on **Allow users to create automated actions**.
3. To let managers create actions for their teams, turn on **Let managers create automated actions for their subordinates**.

Then turn on Manager Groups in Sharing Settings and ensure that each user has their manager indicated in their user record.

### EDITIONS

Available in: **Lightning Experience**

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited Editions**, and available for an extra cost in **Professional and Enterprise Editions**. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To set up Sales Engagement:

- **Customize Application AND Modify All Data**

## Assign Permission Sets for Sales Engagement Users

Assign the permission sets for Sales Engagement. Also assign permission sets for optional features that are new to your Salesforce org, including Sales Dialer. You can also assign the permission set for full access to CRM Analytics dashboards.

1. From Setup, enter *Permission Sets* in the Quick Find box, and then select **Permission Sets**.
2. Verify that the Sales Engagement permission sets and other relevant permission sets are available.
  - In Enterprise Edition, look for the Sales Engagement Cadence Creator, Sales Engagement Quick Cadence Creator, and Sales Engagement User permissions.
  - In Unlimited and Performance Editions, look for the Sales Engagement Cadence Creator Included, Sales Engagement Quick Cadence Creator, and Sales Engagement User Included permissions. These permissions can only be assigned to users with the Salesforce standard user license.
  - In Professional and Enterprise Editions, look for the Sales Engagement Basic permission set.

Salesforce orgs using Sales Engagement also get three CRM Analytics for Sales Cloud Sales Engagement licenses.

If your company is using Lightning Dialer, also check for the Dialer Inbound, Dialer Outbound, and Dialer Minutes permission sets. If you want to use Einstein Conversation Insights, check for the Call Coaching User permission set.

3. Click each permission set you want to assign, and then click **Manage Assignments** to assign the permission set to users.

 **Note:** You can also assign permission sets per user. From Setup, enter *Users* in the Quick Find box, and then select **Users**. Click the name of individual users. In the Permission Set Assignments related list, click **Edit Assignments**.

We recommend that you make these assignments.

- Assign the Sales Engagement User or Sales Engagement User Included permission set to sales reps.
- Assign the Sales Engagement Cadence Creator or Sales Engagement Cadence Creator Included permission set to sales managers and reps who need to create cadences.

 **Note:** If you have assigned users a cloned or custom permission set created before Spring '23, you may need to add the Create and Edit Standard Cadences permission to the permission set again in Spring '23.

- Assign the Sales Engagement Quick Cadence Creator, Sales Engagement Cadence Creator, or Sales Engagement Cadence Creator Included permission set to sales managers and reps who need to create quick cadences.
- Assign the Automated Action User permission to users who need to build their own processes to manage cadence targets they own.
- Assign the three CRM Analytics for Sales Cloud Sales Engagement permission sets to users who need edit access to the Activities and Lead Scoring dashboards.
- If you've turned on Limit Who Can Change Target Assignees in Setup, assign the Change Cadence Target Assignees permission to users who need to change target assignees.
- Assign the Dialer permission sets to new Sales Dialer users.
- Assign the Sales Engagement Conversation Insights permission set to sales managers who need to use Einstein Conversation Insights.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited Editions**, and available for an extra cost in **Professional and Enterprise Editions**. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To set up Sales Engagement:

- Customize Application AND Modify All Data

- Assign the Sales Engagement Cadence Creator or Sales Engagement Cadence Creator Included permission set to users who need to create cadence folders. If they've been granted access, these users can edit folders shared with them and can manage other users' access to the shared folder. These users can edit, and manage user access to, their private folders.
- Assign the Sales Engagement User or Sales Engagement User Included permission set to users who need to view shared cadence folders. If they've been granted access, these users can edit folders shared with them and can manage other users' access to the shared folder. These users can't create folders, and they can't create or edit cadences.
- Assign the Sales Engagement Basic permission set to users who will create quick cadences only.

If you have users who accessed Sales Engagement through an add-on license In Performance or Unlimited Edition before Summer '22, we recommend that you assign those users to the Sales Engagement User Included or Sales Engagement Cadence Creator Included permission, or custom permission set that includes one of them. To make these assignments, add the new permissions to your users before removing the old permissions. Beginning in Summer '22, you can't add users to the older Sales Engagement User or Sales Engagement Cadence Creator permissions.

-  **Note:** The Sales Engagement Cadence Creator (Enterprise Edition) and Sales Engagement Cadence Creator Included (Performance and Unlimited Editions) permission sets include all the permissions included with the Sales Engagement User (Enterprise Edition) and Sales Engagement User Included (Performance and Unlimited Editions) permission sets. There's no need to apply both the Sales Engagement Cadence Creator and the Sales Engagement User permission sets to any single user. If you're making changes that apply to both types of users, make sure to update both permission sets.

## Configure Sales Engagement Features

Set up Sales Dialer and Einstein Lead Scoring if they're new to your org. And make sure that you configure all other relevant features to get the most out of Sales Engagement.

### [Configure Einstein Activity Capture Settings](#)

After you turn on Sales Engagement, you can configure your Einstein Activity Capture settings, such as controlling which activities are added to Salesforce records and how they're shared.

### [Add Sales Engagement Components, Actions, and Fields to Page Layouts](#)

To make Sales Engagement functions fully available to your sales team, add related components, actions, and fields to page layouts for leads, contacts, and accounts.

### [Set Up Sales Dialer for Sales Engagement](#)

If you're using Sales Dialer for the first time, enable Sales Dialer in Setup. Make sure that you add the Phone item to the utility bar for the Sales Engagement app.

### [Define Call Result Values for Cadence Branching](#)

Group call result values into categories to easily display the data in reports and use it as branching criteria for cadences.

### [Set Up Einstein Conversation Insights for Sales Engagement](#)

If you're using Einstein Conversation Insights for the first time, enable Conversation Insights in Setup. Make sure that you set up relevant call insights after turning on the product.

### [Configure a Lead Scoring Solution](#)

If you want help prioritizing your leads, set up Einstein Lead Scoring or a third-party scoring solution.

### [Customize the Work Queue](#)

Select up to three fields to appear in the work queue so that your sales reps see the information at a glance.

#### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

#### USER PERMISSIONS

To set up Sales Engagement:

- **Customize Application AND Modify All Data**

## Configure Einstein Activity Capture Settings

After you turn on Sales Engagement, you can configure your Einstein Activity Capture settings, such as controlling which activities are added to Salesforce records and how they're shared.

Complete these steps.

- [Exclude Certain Emails and Events from Being Added to Salesforce](#) on page 379
- [Set Default Activity Sharing for Einstein Activity Capture Users](#) on page 381
- [Let Users Share Activities with Groups](#) on page 383

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1,** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1,** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

## Add Sales Engagement Components, Actions, and Fields to Page Layouts

To make Sales Engagement functions fully available to your sales team, add related components, actions, and fields to page layouts for leads, contacts, and accounts.

### [Add the Sales Engagements Component to Record Pages](#)

Add the Sales Engagements component to relevant record pages with the Lightning App Builder. With the Sales Engagements component, users can see which cadence a given prospect is in, their engagement activity, and also their progress within the cadence.

### [Add the Work Queue Component to Email Integration Panes for Outlook and Gmail](#)

Sales reps can access the Sales Engagement Work Queue directly from the integrations with Microsoft® Outlook® and Gmail™. Add the Work Queue component to its own tab in a new or existing email application pane. Then assign the pane to your Sales Engagement users.

### [Add the Automated Action Reminders Component to Record Pages](#)

If you turned on Allow users to create automated actions in Automated Actions Setup, add the Automated Action Reminders component to relevant record pages with the Lightning App Builder. With the Automated Action Reminders component, users can see when an automated action has been triggered by a record they own, and choose whether to run the action.

### [Add Cadence Actions to Page Layouts](#)

If your org has customized Salesforce Mobile and Lightning Experience Actions for lead, contact, or person account records, add cadence actions to those objects' page layouts. Add the actions from the Object Manager.

### [Set Up Cadence Fields on Record Layouts](#)

Add Cadence to one of the top Selected Fields to show users the related cadence on lead, contact, and person account records. Users can click the field to view the cadence record, where they can view all the steps in the cadence. And add Cadence Assignee to see which sales rep is working on the prospect.

### [Display Key Cadence Fields on List Views](#)

Make sure that users can see the Cadence and Cadence Assignee fields in relevant list views. You can also create a list view that shows only records linked to a cadence.

### [Set Up Scheduled Email Management for Sales Engagement](#)

As sales reps send emails to leads and contacts, they can schedule the emails so that they arrive at an optimal time. Set up the Scheduled Emails component so that reps can update the content of a scheduled email and change its scheduled date and time.

## EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

## Add the Sales Engagements Component to Record Pages

Add the Sales Engagements component to relevant record pages with the Lightning App Builder. With the Sales Engagements component, users can see which cadence a given prospect is in, their engagement activity, and also their progress within the cadence.

1. From Setup, enter **Lightning App Builder** in the Quick Find box, and then select **Lightning App Builder**.
2. Click **Edit** for the Lightning page you want to modify, or create a new page.
  - For Sales Engagement, make sure you update relevant lead, contact, and person account pages.
  - If Relate Opportunities to Cadences is turned on, you can add the component to opportunity page layouts.
  - If Use Cadences for Collections is turned on, you can add the component to invoice page layouts.
3. Add the Sales Engagements component to the page's layout.
4. Save your changes.
5. If you're creating a new page, activate the page and assign it to Sales Engagement users.
6. Repeat the process for other relevant Lightning pages.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

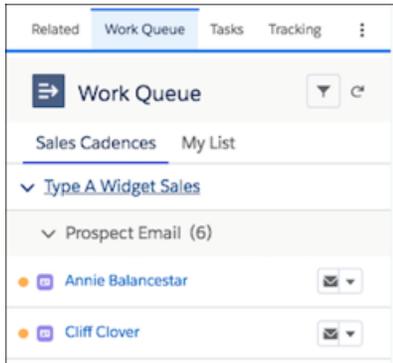
To set up Sales Engagement:

- Customize Application AND Modify All Data

## Add the Work Queue Component to Email Integration Panes for Outlook and Gmail

Sales reps can access the Sales Engagement Work Queue directly from the integrations with Microsoft® Outlook® and Gmail™. Add the Work Queue component to its own tab in a new or existing email application pane. Then assign the pane to your Sales Engagement users.

Give your reps the flexibility to work through their queue from their email application.



1. From Setup, enter *Integration* in the Quick Find box, then select **Outlook Integration and Sync** or **Gmail Integration and Sync**.
2. Expand **Let users access Salesforce records from Outlook/Gmail** and enable **Customize Content with App Builder**.
3. Under Email Application Panes, click **Create New Pane** and select **With Inbox Features**, or edit an existing pane in the list.
4. Click the Tabs component.



5. In the Tabs component properties, click **Add Tab**.
6. Click the tab and select **Custom** title.
7. Enter a descriptive title for the tab, such as Work Queue, or something that describes the queue for your sales reps, and click **Done**.
8. Keep the tab visible in both Compose and Read modes.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

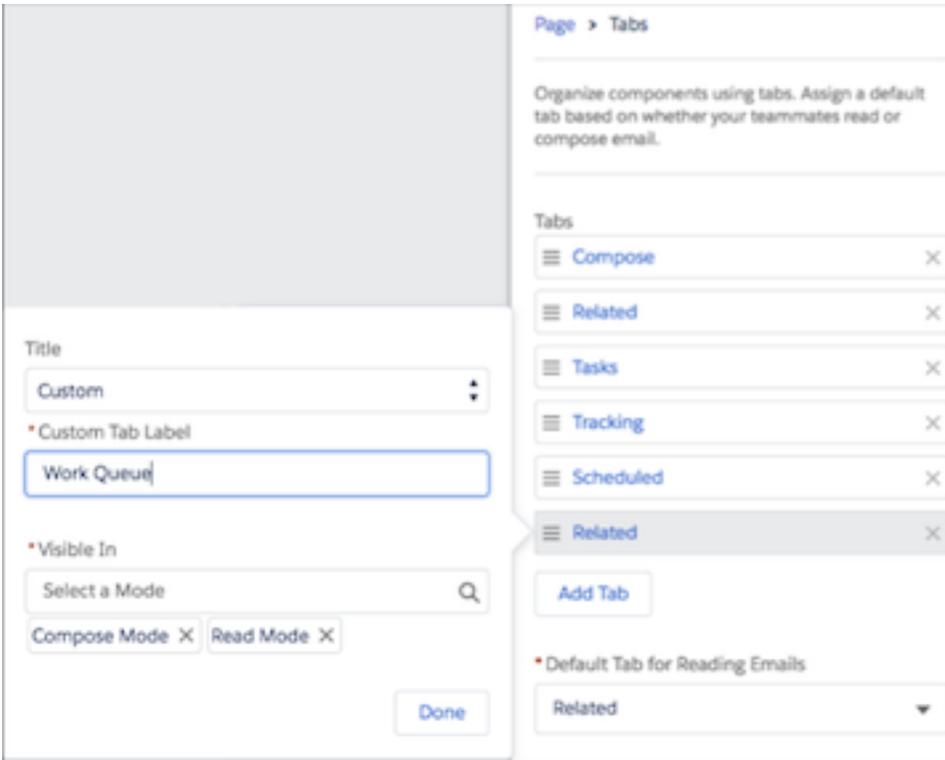
### USER PERMISSIONS

To set up the email integrations to use custom email application panes:

- Customize Application

To create and save Lightning pages in the Lightning App Builder:

- Customize Application



9. Drag and move the tab in the Tabs list to where you want it to display.  
 Tabs are listed from top to bottom in the order they display from left to right in the pane. To make sure that a tab is visible without extra clicks, place the tab in one of the first few positions.
10. Drag the Work Queue component to the tab.
  -  **Tip:** To track links in emails started from the Work Queue in Outlook, also add the Email Tracking component to a tab available in Compose mode.
  -  **Tip:** The My Feed tab in the Work Queue shows engagements and alerts for emails sent from the Work Queue and tracked emails sent from outside the Work Queue. That information is also shown in the Feed tab in the email integration pane. To prevent duplicate feeds for reps who use the Work Queue, use the Lightning App Builder to remove the Feed tab from the email integration pane.
11. Click **Save**.
12. Activate and assign the pane to the user profiles of reps who use Sales Engagement.

## Add the Automated Action Reminders Component to Record Pages

If you turned on Allow users to create automated actions in Automated Actions Setup, add the Automated Action Reminders component to relevant record pages with the Lightning App Builder. With the Automated Action Reminders component, users can see when an automated action has been triggered by a record they own, and choose whether to run the action.

1. From Setup, enter **Lightning App Builder** in the Quick Find box, and then select **Lightning App Builder**.
2. Click **Edit** for the Lightning page you want to modify, or create a new page. For Sales Engagement, make sure you update relevant lead, contact, and person account pages.
3. Add the Automated Action Reminders component to the page's layout.
4. Save your changes.
5. If you're creating a new page, activate the page and assign it to Sales Engagement users.
6. Repeat the process for other relevant Lightning pages.

## Add Cadence Actions to Page Layouts

If your org has customized Salesforce Mobile and Lightning Experience Actions for lead, contact, or person account records, add cadence actions to those objects' page layouts. Add the actions from the Object Manager.

1. From Setup, enter **Object Manager** in the Quick Find box, and then select **Object Manager**.
2. Click the object you want to modify. For Sales Engagement, make sure that you update Lead, Contact, Person Account, and Opportunity.
3. Select **Page Layouts**, and then click the relevant page layout.
4. From the palette on the upper portion of the screen, click **Mobile & Lightning Actions**.
5. Drag these actions to the Salesforce Mobile and Lightning Actions section of the page layout. On the opportunity page layout, you can only use the Add to Sales Cadence action. Cadence actions aren't supported in the Salesforce mobile app.
  - **Add to Cadence**
  - **Remove from Cadence**
  - **Change Target Assignee**
  - **Pause Target**
  - **Resume Target**
6. Save your changes.
7. Repeat the process for other relevant objects. For Sales Engagement, make sure that you update Lead, Contact, and Person Account.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1**, and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To set up Sales Engagement:

- Customize Application AND Modify All Data

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1**, and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To set up Sales Engagement:

- Customize Application AND Modify All Data

## Set Up Cadence Fields on Record Layouts

Add Cadence to one of the top Selected Fields to show users the related cadence on lead, contact, and person account records. Users can click the field to view the cadence record, where they can view all the steps in the cadence. And add Cadence Assignee to see which sales rep is working on the prospect.

1. From Setup, enter **Object Manager** in the Quick Find box, and then select **Object Manager**.
2. Click the object you want to modify. For Sales Engagement, make sure that you update Lead, Contact, and Person Account.
3. Select **Compact Layouts**, and then click **New**.
4. Enter a label for the compact layout. *Sales Engagement Compact Layout* works here.
5. Add **Cadence**, **Cadence Assignee**, **Cadence State**, **First Call Date**, and **First Email Date** as a few of the top Selected Fields.
6. Save your changes.
7. Click **Compact Layout Assignment** and then **Edit Assignment**.
8. Select the compact layout as the Primary Compact Layout, and then save your changes.
9. Repeat the process for other relevant objects. For Sales Engagement, make sure that you update Lead, Contact, and Person Account.

## Display Key Cadence Fields on List Views

Make sure that users can see the Cadence and Cadence Assignee fields in relevant list views. You can also create a list view that shows only records linked to a cadence.

1. Navigate to the list view where you want to expose the fields.  
If you're using the sales console, switch out of the split view to see the List View Controls.
2. Select the List View Controls dropdown, and then click **Select Fields to Display**.  
Not all list views are editable, such as the Recently Viewed list view.
3. Add Cadence and Cadence Assignee as a couple of the top Visible Fields.
4. Save your changes.
5. Repeat the process for other relevant list views.  
For Sales Engagement, update the lead, contact, and person account list views.

## Set Up Scheduled Email Management for Sales Engagement

As sales reps send emails to leads and contacts, they can schedule the emails so that they arrive at an optimal time. Set up the Scheduled Emails component so that reps can update the content of a scheduled email and change its scheduled date and time.

See [Set Up Send Later for Your Sales Reps](#)

SEE ALSO:

[Things to Know About Using Send Later](#)

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance**, **Einstein 1**, and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To set up Sales Engagement:

- Customize Application AND Modify All Data

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance**, **Einstein 1**, and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To set up Sales Engagement:

- Customize Application AND Modify All Data

## Set Up Sales Dialer for Sales Engagement

If you're using Sales Dialer for the first time, enable Sales Dialer in Setup. Make sure that you add the Phone item to the utility bar for the Sales Engagement app.

See [Enable Sales Dialer](#) and [Add Dialer to the Utility Bar](#).

## Define Call Result Values for Cadence Branching

Group call result values into categories to easily display the data in reports and use it as branching criteria for cadences.

1. From Setup, enter **Sales Engagement** in the Quick Find box, and then select **Sales Engagement Settings**.
2. Click the **Call** tab.
3. In the Cadence Call Settings section, edit the Define Call Results for Branching section and enable the feature.
4. Enter the call result values used by your org next to the related call result categories.  
If your org is using Lightning Dialer, click the **Edit Call Result Values** link to confirm or modify your org's current call result values.
  -  **Note:** Make sure you enter the call result values correctly.
5. Click Save.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1**, and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To set up Sales Engagement:

- Customize Application AND Modify All Data

### EDITIONS

Available in: Lightning Experience

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### USER PERMISSIONS

To set up Sales Engagement:

- Customize Application AND Modify All Data

## Set Up Einstein Conversation Insights for Sales Engagement

If you're using Einstein Conversation Insights for the first time, enable Conversation Insights in Setup. Make sure that you set up relevant call insights after turning on the product.

Complete these steps.

- [Turn On Einstein Conversation Insights](#)
- [Connect Voice Recording Providers](#)
- [Set Up Call Insights](#)

## Configure a Lead Scoring Solution

If you want help prioritizing your leads, set up Einstein Lead Scoring or a third-party scoring solution.

### [Set Up Einstein Lead Scoring for Sales Engagement](#)

If you're using Einstein Lead Scoring for the first time, enable and configure Einstein Lead Scoring in Setup.

### [Set Up Third-Party Prospect Scoring for Sales Engagement](#)

Configure third-party scores for person accounts, contacts, or leads. Show scores on records, and use scores to sort the Work Queue.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1,** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To set up Sales Engagement:

- Customize Application AND Modify All Data

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1,** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To set up Sales Engagement:

- Customize Application AND Modify All Data

## Set Up Einstein Lead Scoring for Sales Engagement

If you're using Einstein Lead Scoring for the first time, enable and configure Einstein Lead Scoring in Setup.

1. From Setup, enter **Einstein Lead Scoring** in the Quick Find box, and then select **Einstein Lead Scoring**.
2. On the Settings page, click **Get Started**.
3. Read the introduction, and then click **Next**.
4. Choose the lead conversion milestone that matches your business practices. Does your sales team create opportunities when they convert leads, or do they simply convert leads to accounts and contacts? Then click **Next**.
5. Choose whether you want Einstein to score all your leads or only leads that meet criteria you specify. To score only certain leads, click **Score only leads that meet my criteria**. Otherwise, click **Next**.

You can specify up to 100 field filters for the leads you want to score. The CurrencyIsoCode field can't be used in lead field filters.

The following field data types also can't be used in lead field filters.

- Address
- Date
- Datetime
- Double
- Encrypted String
- Geolocation
- Multipicklist
- Reference— However, the RecordTypeId reference field is supported.
- Text Area
- Time

6. Choose whether you want Einstein to include all your lead fields during lead score analysis. To exclude specific fields, click **No, ignore certain fields (Advanced)**, and then deselect the fields you want to ignore. Otherwise, click **Next**.

Some businesses use fields that don't affect a lead's chance of converting. For example, you might have a field that indicates the reason a lead didn't convert. Telling Einstein to ignore those fields yields more accurate lead scores. Before ignoring a field, make sure that the field doesn't affect the lead's chance of converting. Ignoring fields that affect score analysis decreases the accuracy of your lead scores. If you are uncertain about whether to ignore a particular field, contact Salesforce Customer Support.

7. Wait while Einstein confirms that your company's data works with the settings you've chosen.
8. When Einstein finishes confirming your settings, click **Score Leads**.
9. Using the Lightning App Builder, make sure that the Einstein Lead Scoring component was added to Lightning pages for leads. In Salesforce Classic, add the Lead Score field to lead page layouts. The Lead Score field can't be used on the same page layout as the Lead Score Distribution or Conversion Rate by Lead Score report components.
10. After scores are available, add the Lead Score field to public lead list views. Salesforce automatically adds this field to default list views.

It takes up to 24 hours for lead scores to be available. Sales Cloud Einstein users see scores and factors on the Einstein Scoring component.

To see the component, users need read access to the Company, Phone, and Email fields on leads.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To set up Sales Engagement:

- Customize Application AND Modify All Data

 **Tip:** To get the most out of Einstein Lead Scoring, encourage sales reps to add the Lead Score field to their lead list views.

## Set Up Third-Party Prospect Scoring for Sales Engagement

Configure third-party scores for person accounts, contacts, or leads. Show scores on records, and use scores to sort the Work Queue.

 **Note:** If Einstein Lead Scoring is set up, the Work Queue sorts leads automatically by lead score. Even if you're using Einstein Lead Scoring, you can configure third-party scores for contacts or person accounts separately. For more information about adding Einstein lead scores to Sales Engagement, see [Set Up Einstein Lead Scoring for Sales Engagement](#).

1. Create a custom number field on the lead or contact object. For person accounts, configure a custom number field in the object management settings for contacts.
2. Configure the custom number field with your integrated third-party application to populate scores.
3. From Setup, enter **Sales Engagement** in the Quick Find box, and then select **Sales Engagement**.
4. Next to the object for which you want to add custom scores, click **Edit**.
5. From the object's custom score dropdown, select the custom number field that's configured as the third-party score. Users see this field as a sorting option in the Work Queue.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To set up Sales Engagement:

- Customize Application AND Modify All Data

## Customize the Work Queue

Select up to three fields to appear in the work queue so that your sales reps see the information at a glance.

1. From Setup, select **Object Manager**, and then click the name of the entity whose layout you want to edit.
2. Click **Compact Layouts**, and click the name of the layout you want to customize.
3. Click **Edit**.
4. In the **Selected Fields** column, the first three fields represent the data that displays in the work queue. Change the order of the fields so that the fields you want to display are one of the first three fields listed.

Cadence isn't supported as a field for the work queue. If it's one of the first three fields, the fourth field appears in its place.

5. Click **Save**.

You can customize different fields for each record type.

## Set Up an Optional Sales Prospecting Bot

Admins can enable an optional Einstein Bot for Sales Engagement. Build and manage a Sales Prospecting Bot to ease the load on your sales reps. Bots can handle information collection and answer frequently asked questions so sales reps can spend their time on more complex tasks.

The Sales Prospecting Bot template covers common use cases for sales prospects. Each use case appears in the bot's Main Menu, which directs users down different paths in the bot depending on what they select. The Sales Prospecting Bot template also includes prebuilt flows that handle the creation, assignment, and look-up of Salesforce records. For example, the Connect with Sales dialog skill includes a flow to create a lead.

### [Sales Prospecting Bot Requirements](#)

Before you get started with the Sales Prospecting Bot template, confirm that you meet these requirements.

### [Get Started with the Sales Prospecting Bot](#)

Create a fully featured bot with the Sales Prospecting Bot template. Ease the load on your sales reps with the bot's prebuilt flows and included intent data.

### [Set Up Omni-Channel for Your Sales Prospecting Bot](#)

Set up Omni-Channel so your sales prospecting bot can intercept leads and pass them to your sales reps in real time. That way, your reps can assist your leads more effectively and close sales faster.

### [Set Up a Prospect Queue for Your Sales Prospecting Bot](#)

Assign your sales prospecting bot's incoming leads to sales reps automatically with a prospect queue. When a new Lead work item is assigned to the prospect queue, Omni-Channel attempts to route it to a sales rep using your routing configuration.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To set up Sales Engagement:

- Customize Application AND Modify All Data

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### [Add a Cadence for Your Sales Prospecting Bot](#)

Create a cadence for your sales prospecting bot called Sales Bot Cadence. That way, you can guide sales reps that are assigned to bot-generated leads through a scheduled sequence of prospect outreach activities.

### [Deploy Your Sales Prospecting Bot](#)

Your sales prospecting bot can connect to many different endpoints, expanding the ways that you communicate with your customers. To get started, activate your sales prospecting bot and set up embedded chat.

#### SEE ALSO:

[Einstein Bots](#)

## Sales Prospecting Bot Requirements

Before you get started with the Sales Prospecting Bot template, confirm that you meet these requirements.

1. Obtain a Chat or Messaging license. Then enable [Chat](#) and [Omni-Channel](#).
2. [Add the Omni-Channel widget](#) to the Sales Engagement console app.
3. [Create an Experience Cloud site](#) for your bot.
4. [Enable Lightning Knowledge](#) if you want your bot to serve knowledge articles to customers.
  - a. To do more than read knowledge articles, your sales reps need a Knowledge User license. [Assign permissions](#) to users who publish, archive, delete, and manage articles.

#### EDITIONS

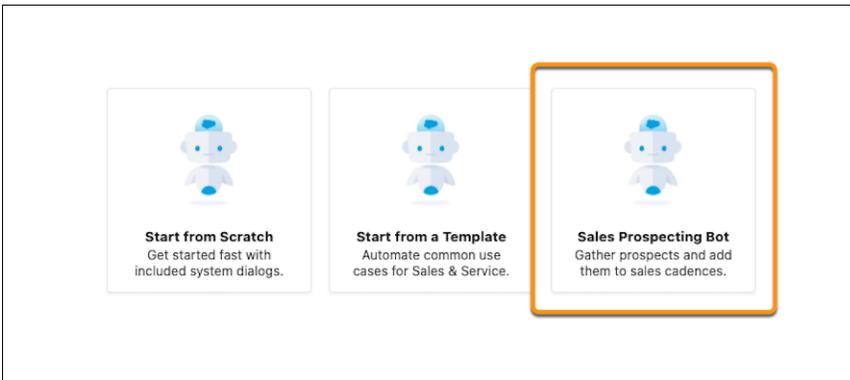
Available in: **Lightning Experience**

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

## Get Started with the Sales Prospecting Bot

Create a fully featured bot with the Sales Prospecting Bot template. Ease the load on your sales reps with the bot's prebuilt flows and included intent data.

1. From Setup, in the Quick Find box, enter *Einstein Bots*, and then select **Einstein Bots** under Service Cloud Einstein. To get started with Einstein Bots, click the toggle and accept the terms. Then click **Try Einstein**.
2. Launch the Guided Setup Flow from the Einstein Bots main page. For your first bot, click **Create a New Bot**. Otherwise, click **New**.
3. Select **Sales Prospecting Bot** from the options provided. Click **Next**.



4. Give your bot a name. This name is visible to customers, so select something that fits your company's voice and tone. You can edit this name later on the [Bot Overview](#) page.
5. Select your bot's primary language. Click **Next**.
6. Select your bot's actions. You can include **Company and Products**, **Connect with Sales**, or both. Each action creates a dialog and adds it to the bot Main Menu. Click **Next**.
7. Select an Embedded Service Deployment for your bot. Each bot requires a unique deployment. Selecting a deployment that is already in use can disrupt other services. If you don't link a deployment, the Bot Preview page doesn't automatically work.
8. To start intent model training, click **Proceed** and then **Finish**. The intent model requires a few hours to build. Until the model is built, text input into the bot isn't processed for intent. When the Model Management page is updated with metrics, the intent model is ready to use.

### SEE ALSO:

[Einstein Bots System Limitations](#)

[Understand Einstein Bot Dialogs](#)

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance**, **Einstein 1**, and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To build and manage Einstein Bots:

- Customize Application OR Modify Metadata OR Manage Bots

To create a sales prospecting bot:

- Sales Engagement User or Sales Engagement User Included

OR

Sales Engagement Cadence Creator Included

## Set Up Omni-Channel for Your Sales Prospecting Bot

Set up Omni-Channel so your sales prospecting bot can intercept leads and pass them to your sales reps in real time. That way, your reps can assist your leads more effectively and close sales faster

With Omni-Channel, leads are automatically routed or “pushed” to sales reps assigned to the associated queue. After you create a service channel, routing configuration, presence statuses, and a presence configuration, you associate them with a queue that contains sales prospects.

### [Create a Service Channel for Your Sales Prospecting Bot](#)

Set up a service channel for your sales prospecting bot that turns your incoming prospects into Lead work records. That way, Omni-Channel can route your bot’s leads to sales reps.

### [Create a Routing Configuration for Your Sales Prospecting Bot](#)

Routing configurations let you determine how work items are routed to your reps. Create a routing configuration for your sales prospecting bot that prioritizes the relative importance and size of leads. That way, leads are handled accordingly, and work is evenly distributed to your sales reps.

### [Create a Presence Status for Your Sales Prospecting Bot](#)

Presence statuses indicate if a sales rep is online and available to receive prospects. Create a presence status for your sales prospecting bot that includes your service channel. That way, reps that are assigned to this presence status can receive your bot’s incoming leads.

### [Create a Presence Configuration for Your Sales Prospecting Bot](#)

Use a presence configuration to limit how much work a sales rep can take on. That way, incoming leads from your sales prospecting bot’s are evenly distributed to your reps. You can set up multiple configurations for different groups of reps.

#### SEE ALSO:

[Omni-Channel for Administrators](#)

#### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance**, **Einstein 1**, and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

#### USER PERMISSIONS

To set up Omni-Channel:

- [Customize Application](#)

## Create a Service Channel for Your Sales Prospecting Bot

Set up a service channel for your sales prospecting bot that turns your incoming prospects into Lead work records. That way, Omni-Channel can route your bot's leads to sales reps.

1. From Setup, in the Quick Find box, enter *Service Channels*, select **Service Channels**, and then click **New**.
2. For the *Service Channel Name* field, enter *Leads*.
3. For the *Salesforce Object* field, select *Lead*.
4. Specify the remaining settings for your service channel and save your changes.

SEE ALSO:

[Service Channel Settings](#)

## Create a Routing Configuration for Your Sales Prospecting Bot

Routing configurations let you determine how work items are routed to your reps. Create a routing configuration for your sales prospecting bot that prioritizes the relative importance and size of leads. That way, leads are handled accordingly, and work is evenly distributed to your sales reps.

1. From Setup, in the Quick Find box, enter *Routing Configurations*, select **Routing Configurations**, and then click **New**.
2. For the *Routing Configuration Name* field, enter *Sales Routing – Leads*.
3. For the *Units of Capacity* field, enter *1*.
4. Specify the remaining settings for your routing configuration and save your changes.

SEE ALSO:

[Routing Configuration Settings](#)

[Omni-Channel Routing Model Options](#)

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1**, and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To set up Omni-Channel:

- Customize Application

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1**, and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To set up Omni-Channel:

- Customize Application

## Create a Presence Status for Your Sales Prospecting Bot

Presence statuses indicate if a sales rep is online and available to receive prospects. Create a presence status for your sales prospecting bot that includes your service channel. That way, reps that are assigned to this presence status can receive your bot's incoming leads.

1. From Setup, in the Quick Find box, enter *Presence Statuses*, select **Presence Statuses**, and then click **New**.
2. For the *Status Name* field, enter *Available - Lead*.
3. For the status option, select **Online**. The Online status lets reps who use this presence status receive new work items.
4. Add the Leads service channel to the Available Channels list.
5. Save your changes. To add more statuses, repeat the steps. For example, you can create a Busy presence status to indicate that a rep is unavailable and can't receive incoming prospects.
6. [Give reps access to your presence statuses](#) through permission sets or profiles.

SEE ALSO:

[Presence Status Settings](#)

## Create a Presence Configuration for Your Sales Prospecting Bot

Use a presence configuration to limit how much work a sales rep can take on. That way, incoming leads from your sales prospecting bot's are evenly distributed to your reps. You can set up multiple configurations for different groups of reps.

1. From Setup, in the Quick Find box, enter *Presence Configurations*, select **Presence Configurations**, and then click **New**.
2. For the *Presence Configuration Name* field, enter *Leads*.
3. Indicate the maximum units of work a sales rep can take on. If you set the *Units of Capacity* field to *1* in your routing configuration, each work item is 1 unit.
4. To automatically accept work assignments that are pushed to a sales rep, select **Automatically Accept Requests**.
5. Specify the remaining settings for your presence configuration.
6. Save your changes. To add more presence configurations, repeat the steps.

SEE ALSO:

[Presence Configuration Settings](#)

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To set up Omni-Channel:

- [Customize Application](#)

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To set up Omni-Channel:

- [Customize Application](#)

## Set Up a Prospect Queue for Your Sales Prospecting Bot

Assign your sales prospecting bot's incoming leads to sales reps automatically with a prospect queue. When a new Lead work item is assigned to the prospect queue, Omni-Channel attempts to route it to a sales rep using your routing configuration.

1. From Setup, in the Quick Find box, enter *Queues*, select **Queues**, and then click **New**.
2. For the `Label` field, enter *Leads*.
3. Select the routing configuration that you created when you set up Omni-Channel for your bot.
4. If you use divisions, select the queue's default division.
5. Add the Lead object to the queue.
6. Add your sales reps as queue members. The members are assigned records from this queue. Members can be individuals, roles, public groups, territories, connections, or partner users. Guest users can't be queue members.
7. Save your changes.

### [Create Assignment Rules for Your Sales Prospecting Bot's Prospect Queue](#)

Use lead assignment rules to add your sales prospecting bot's leads to your prospect queue automatically.

#### SEE ALSO:

[Rules and Queues](#)

[How Does Omni-Channel Queue-Based Routing Work?](#)

#### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

#### USER PERMISSIONS

To create or change queues:

- Customize Application AND Manage Public List Views

To change queues created by other users:

- Customize Application AND Manage Public List Views AND Manage Users

## Create Assignment Rules for Your Sales Prospecting Bot's Prospect Queue

Use lead assignment rules to add your sales prospecting bot's leads to your prospect queue automatically.

1. For the Lead object's `Lead Source` field, add `Sales Bot` as a custom picklist value.
2. From Setup, in the Quick Find box, enter `Lead Assignment Rules`, select **Lead Assignment Rules**, and then click **New**.
3. For the `Name` field, enter `Sales Prospecting Bot`.
4. To activate the assignment rule, select **Active**. Then click **Save**.
5. Click your new assignment rule, then under Rule Entries, click **New**.
6. For the `Sort Order` field, enter `1`.
7. For the rule criteria, select the **Lead: Lead Source** field and **equals** operator.
8. From the value picklist, select **Sales Bot**.
9. Assign the lead to your prospect queue and save your changes.

### SEE ALSO:

[Add or Edit Picklist Value](#)

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To view assignment rules:

- View Setup AND Configuration

To create or change assignment rules:

- Customize Application

## Add a Cadence for Your Sales Prospecting Bot

Create a cadence for your sales prospecting bot called Sales Bot Cadence. That way, you can guide sales reps that are assigned to bot-generated leads through a scheduled sequence of prospect outreach activities.

1. In the Sales Engagement app, select **Cadences** from the Navigation menu. Then click **New Cadence**.
2. For the **Name** field, enter *Sales Bot Cadence*. Your bot's cadence must be named Sales Bot Cadence.
3. Select the **Public Cadences** folder, then click **Save**.
4. Add steps to your cadence. To send prospects to another cadence when they finish this one, click the **End** step. Turn on **Exit to linked cadence**, and then choose an active cadence.
5. When you're finished adding steps and ready to start assigning prospects to the cadence, click **Activate**.

### SEE ALSO:

[Streamline Prospect Outreach with Cadences](#)

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance**, **Einstein 1**, and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

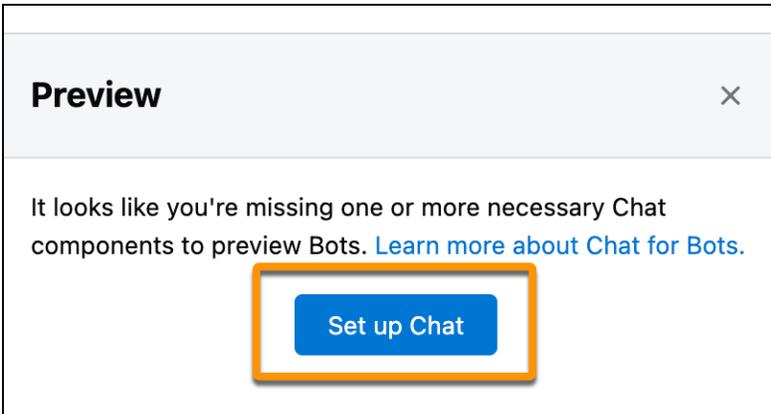
To create cadences:

- Sales Engagement Cadence Creator
- OR
- Sales Engagement Cadence Creator Included

## Deploy Your Sales Prospecting Bot

Your sales prospecting bot can connect to many different endpoints, expanding the ways that you communicate with your customers. To get started, activate your sales prospecting bot and set up embedded chat.

1. From Setup, in the Quick Find box, enter *Einstein Bots*, select **Einstein Bots** under Service Cloud Einstein, and then select your sales prospecting bot.
2. On your bot's overview page, click **Activate**. Then click **Preview**.
3. To set up embedded chat for your sales prospecting bot, click **Set up Chat**. Then click **Start**.



4. Create a chat queue, create a routing configuration, and adjust your reps' chat workload. Add your Experience Cloud site's URL. You can find your site's URL on the All Sites page in Setup. Select Sales, and choose an offline support option. Then click **Finish**.
5. Click **Next** and then **Done**.
6. To preview your bot, click the Chat button in Preview.

### [Deploy Your Bot to Your Experience Cloud Site](#)

Add your sales prospecting bot to an existing Experience Cloud site to increase case deflection and user engagement.

#### SEE ALSO:

[Chat](#)  
[Messaging](#)

#### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

#### USER PERMISSIONS

To deploy a sales prospecting bot:

- Manage User Profiles AND Run Flows AND Permission Sets

To add, edit, or delete channels:

- Customize Application

## Deploy Your Bot to Your Experience Cloud Site

Add your sales prospecting bot to an existing Experience Cloud site to increase case deflection and user engagement.

To get started, deploy your bot to your Experience Cloud site. You can also deploy your bot to Chat channels (in-app and web) and SMS, Facebook Messenger, and WhatsApp channels. To add your bot to a conversation channel, see [Deploy Your Bot to Your Channels](#).

 **Note:** You can create multiple bots, but an Experience Cloud site can only have one active bot.

1. From Setup, in the Quick Find box, enter *All Sites*, and select **All Sites**. Then click **Builder** next to your site.
2. From Settings, select **Security & Privacy**. Ensure that your security Level is **Relaxed CSP**, then under Trusted Sites for Scripts, click **Add Trusted Site**.
3. For the Name field, enter *Sales Prospecting Bot*.
4. For the URL field, enter your bot's Chat API Endpoint, and omit */chat/rest/*. You can find your bot's Chat API endpoint on the Chat Settings page in Setup.
5. Select **Active**, then click **Add Site**.
6. To add and configure the chat component on the site, open the Components panel, and then search for *Embedded Service Chat*. Add the Embedded Service Chat component to the Template Footer region of your site's home page.
7. Label your chat button, and specify the remaining settings.
8. To test your bot from a sales rep's perspective, [test your embedded chat window](#).
9. Before you deploy your bot on your live Experience Cloud site, [add knowledge articles](#) with your company and product information. To serve knowledge articles with your bot, you must add the summary field to the Knowledge object's page layout.
10. To deploy the bot on your live Experience Cloud site, click **Publish**, and then click **Got It**.

SEE ALSO:

[Experience Cloud](#)

[Embedded Service Component](#)

[Knowledge](#)

## Start Using the Sales Engagement App

With Sales Engagement set up, your sales managers and reps can start using the app by creating cadences and adding prospects to them.

[Get Started Managing Sales with Sales Engagement](#)

Start using Sales Engagement by navigating to the app and creating your first cadence.

### EDITIONS

Available in: **Lightning Experience**

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

OR

Be a member of the site AND an experience admin, publisher, or builder in that site

### [Get Started Selling to Prospects with Sales Engagement](#)

Start using Sales Engagement by navigating to the app and adding prospects to cadences, which makes them appear in your Work Queue.

#### SEE ALSO:

[Sell Faster with Sales Engagement](#)

## Get Started Managing Sales with Sales Engagement

Start using Sales Engagement by navigating to the app and creating your first cadence.

1. From the App Launcher, find and open **Sales Engagement**.
2. To [start using Einstein Activity Capture](#), click the banner at the top of the page. If you're new to Dialer, click the banner to select a Dialer number.
3. Switch to the split view in console.
4. [Create and activate a cadence](#).
5. [Add prospects to a cadence](#).

Check out additional resources.

#### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1,** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

#### USER PERMISSIONS

To set up Sales Engagement:

- Customize Application AND Modify All Data

## Get Started Selling to Prospects with Sales Engagement

Start using Sales Engagement by navigating to the app and adding prospects to cadences, which makes them appear in your Work Queue.

1. From the App Launcher, find and open **Sales Engagement**.
2. Set up [Einstein Activity Capture](#).  
If you're new to Dialer, click the banner to select a Dialer number.
3. Switch to the split view in console.
4. [Add leads, contacts, or person accounts to your Work Queue](#).

Check out additional resources.

## Prospecting Center

Let Prospecting Center find your most qualified customer, using trusted data and AI. Prospecting Center analyzes your CRM and external data and identifies your most promising opportunities with the highest probability of closing, so you know which deals to prioritize. With the power of Data Cloud, you can analyze your accounts, contacts, and leads to identify your most accurate, data-driven prospects.

### [Integration of Prospecting Center and Data Cloud](#)

Prospecting Center, powered by Data Cloud, uses various external and internal signals to calculate scores, which in turn enables sales reps to allocate their time more effectively and drive better outcomes in their sales efforts.

### [Set Up Prospecting Center](#)

Use the Setup menu to get the guidance you need for setting up Prospecting Center. Make sure you enable Data Cloud and Sales Engagement in the same Salesforce org (not in a sandbox).

### [Find Your Next Customer With Prospecting Center](#)

Get an all-in-one view of your accounts and their scores, with multiple ways to find your next prospects, depending on how you want them to be categorized. You can prioritize them based on either segments or scores. You can see scores for all accounts or dive into each account for more details.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To set up Sales Engagement:

- Customize Application AND Modify All Data

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

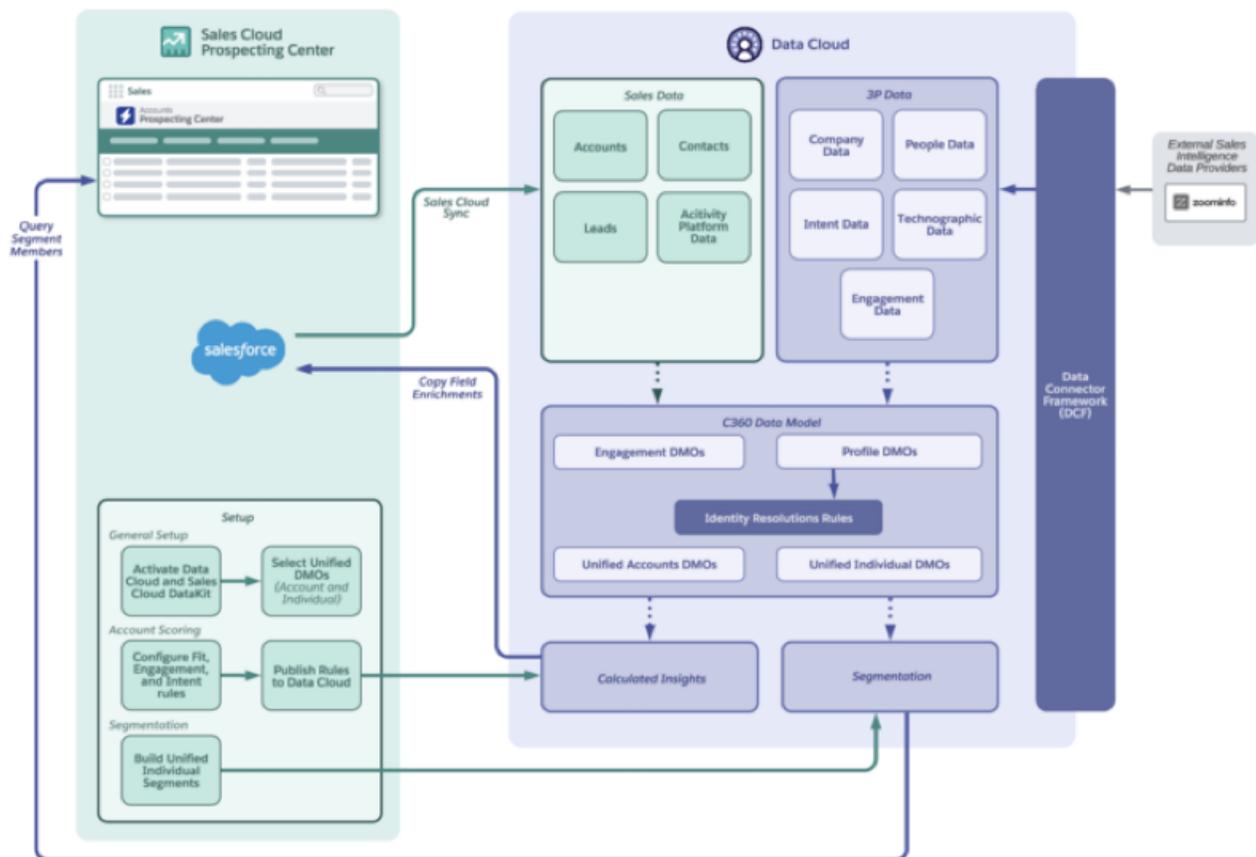
## Integration of Prospecting Center and Data Cloud

Prospecting Center, powered by Data Cloud, uses various external and internal signals to calculate scores, which in turn enables sales reps to allocate their time more effectively and drive better outcomes in their sales efforts.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1,** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.



Sales Cloud integrates seamlessly with Data Cloud to empower sales reps with enriched prospect data. By syncing sales data with third-party data sources, Prospecting Center provides unified insights and advanced segmentation. This process allows sales reps to

identify high-potential prospects more effectively, improve account scoring, and tailor their engagement strategies for better conversion rates. The integration ensures a quick transition to more intelligent and data-driven sales processes.

## Set Up Prospecting Center

Use the Setup menu to get the guidance you need for setting up Prospecting Center. Make sure you enable Data Cloud and Sales Engagement in the same Salesforce org (not in a sandbox).

Prepare to use Prospecting Center in four high-level steps.

1. Bring in your raw Sales Cloud data. Connect your Sales Cloud data to Data Cloud by using the native Salesforce CRM connector. This process includes sales activities such as sending and receiving emails, engagement data, and conversation insights. You can also bring in third-party data by using the ZoomInfo Connector.
2. Unify your customer information. Map your ingested data with Data Cloud standard 360 Data Model for harmonization. Use Identity Resolution rules to create a 360 view of all customer touch-points into a unified individual profile for segmentation.
3. Build your marketing segments. Create audience segments on the unified individual profile, using the segment canvas drag functionality, to be viewed in the Prospecting Center app.
4. Set up Prospecting Center. Enable the Prospecting Center app for sellers to view prospects within the accounts that they own or within their territories to identify their next best customer and create a plan for outreach.

### EDITIONS

Available in: **Lightning Experience**

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### [Considerations for Setting Up Prospecting Center](#)

If you're a Salesforce admin, review considerations about Prospecting Center before setting up the product for your users.

### [Configure Data Cloud for Prospecting Center](#)

To set up Prospecting Center, enable and configure Data Cloud so you can leverage the data effectively. Data Cloud can be enabled in any Salesforce org.

### [Enable Prospecting Center](#)

To score your accounts and act on the most accurate and data-driven prospects, spending less time in analyzing your customers, enable Prospecting Center and Account Scoring. After Prospecting Center is connected, your data from Data Cloud is synced.

### [Set Up Scoring Rules for Prospecting Center](#)

Prioritize your work and spend time on prospects that are likely to be the best fit for you. You can set up Account Scoring only when you turn on Prospecting Center. When you set up scoring rules, you're defining the criteria based on which your Engagement, Fit, Intent, and your overall Account scores are calculated.

### [Give Users Access to Prospecting Center](#)

For sales reps to access the Prospecting Center app, assign the necessary user permissions and enable the Prospecting Center user app permissions.

## Considerations for Setting Up Prospecting Center

If you're a Salesforce admin, review considerations about Prospecting Center before setting up the product for your users.

- Make sure that Unification rules for Account and Individual data model objects (DMOs) are defined.
- Prospecting Center supports up to 100 data segments defined in Salesforce Data Cloud Setup. If more than 100 segments are defined, Prospecting Center uses the first 100 in alphabetical order by segment name. You can select up to five segments at a time.
- If you have a consumption-based Data Cloud plan, the usage of Prospecting Center contributes to your overall Data Cloud credit usage under the Data Query service. Start your Prospecting Center configuration with Data Cloud settings.
- Your org is eligible to use Prospecting Center only if you have fewer than 1 million combined accounts, contacts, leads, and opportunities.

## Configure Data Cloud for Prospecting Center

To set up Prospecting Center, enable and configure Data Cloud so you can leverage the data effectively. Data Cloud can be enabled in any Salesforce org.

### Set Up a Data Cloud Admin User

Before turning on Data Cloud for Prospecting Center, you need to set up an admin user. See [Set Up a Data Cloud Admin User](#).

### Turn On Data Cloud

In the Setup, enable Data Cloud to access your account data in the Prospecting Center App. See [Turn On Data Cloud](#).

#### [Third-Party Connectors for Prospecting Center](#)

Configure data to flow into Prospecting Center through connectors and third-party integrations. New connectors are added regularly to expand what data can be ingested into Prospecting Center, providing more value when unifying your data.

#### [Define Data Segments for Prospecting Center](#)

You're ready to create segments now that the data has been ingested and mapped to a unified profile. Marketers define segments depending on the potential customers they want to target, such as people potentially interested in a product or service. Your data segments are specific to your business. For example, a segment can be people who have downloaded your white paper or visited your website more than once.

#### [Create Identity Resolution Rules for Prospecting Center](#)

Identity Resolution uses matching and reconciliation rules to link data from multiple sources about people or accounts into unified profiles for segmentation, insights, and reporting. In Prospecting Center, Identity Resolutions unify data that's coming in from Data Cloud into the Prospecting Center, so your Sales reps don't waste their time evaluating duplicate records.

#### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

#### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### [Copy Field Enrichments for Prospecting Center](#)

Copy data from Data Cloud into your org using the Copy Field Enrichment settings. Copy Fields show field data copied from objects with a 1-to-1 relationship to a Data Cloud Individual, Unified Individual, Data Cloud Account, or Unified Account DMO.

### Third-Party Connectors for Prospecting Center

Configure data to flow into Prospecting Center through connectors and third-party integrations. New connectors are added regularly to expand what data can be ingested into Prospecting Center, providing more value when unifying your data.

See [ZoomInfo Connector](#).

### Define Data Segments for Prospecting Center

You're ready to create segments now that the data has been ingested and mapped to a unified profile. Marketers define segments depending on the potential customers they want to target, such as people potentially interested in a product or service. Your data segments are specific to your business. For example, a segment can be people who have downloaded your white paper or visited your website more than once.

See [Create and Activate Segments](#).

-  **Note:** Sales reps can choose which segment to view from the Marketing Segment menu. After they select a segment, they see only the accounts that include contacts from the selected segments, along with the total number of contacts in that segment per account. The total number of accounts owned by the user in the segment also appears at the top of the app.

#### EDITIONS

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## Create Identity Resolution Rules for Prospecting Center

Identity Resolution uses matching and reconciliation rules to link data from multiple sources about people or accounts into unified profiles for segmentation, insights, and reporting. In Prospecting Center, Identity Resolutions unify data that's coming in from Data Cloud into the Prospecting Center, so your Sales reps don't waste their time evaluating duplicate records.

1. In the Salesforce Data Cloud app, click the **Identity Resolution** tab. Click **New**.
2. For Data Space, select **Default**.
3. For Primary Data Model Object, select **Individual, Account, or Leads**. Click **Next**.
4. Enter a name for the rule. Click **Save**.
5. On the new Identity Resolution object home, under Ruleset Properties, click **Configure** next to Match Rules.
6. To unify profiles coming from different data sources, lick **Add Match Rule**. Select the default match rule, for example, Fuzzy Name and Normalized Email.
7. Click **Next > Next > Save**.
8. Click **Run Ruleset** for Data Cloud to build the unified profiles records. This process can take a few minutes. An entity can have up to two published rulesets in a data space.

After you complete this step, your Identity Resolution ruleset mirrors this image. You see a Resolution Summary on the right-side panel denoting the total number of unified individual profiles created, based on your match and reconciliation rules.

### EDITIONS

Available in: Lightning Experience

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### USER PERMISSIONS

To create identity resolution rulesets:

- Data Cloud Admin OR
- Data Cloud for Marketing Admin OR
- Data Cloud for Marketing Data Aware Specialist

The screenshot displays the Salesforce Data Cloud interface for configuring an Identity Resolution rule. The main panel shows the 'Ruleset Properties' for a rule named 'UnifiedIndividualRule' in the 'default' data space. The 'Match Rules' section is set to 'Fuzzy Name and Normalized Email'. The 'Reconciliation Rules' section lists 'Contact Point Address', 'Contact Point Email', and 'Individual'. On the right, the 'Resolution Summary' panel provides key metrics: 628 Total Unified Profiles (from 653 Source Profiles), a 4% Consolidation Rate, 50 Matched Source Profiles, 628 Known Unified Profiles, and 0 Anonymous Unified Profiles. The interface includes navigation tabs, a search bar, and a 'Run Ruleset' button.

## Copy Field Enrichments for Prospecting Center

Copy data from Data Cloud into your org using the Copy Field Enrichment settings. Copy Fields show field data copied from objects with a 1-to-1 relationship to a Data Cloud Individual, Unified Individual, Data Cloud Account, or Unified Account DMO.

CIO objects must have an Individual ID as the dimension. Multidimensional CIO objects aren't supported. For example, adding a field for Lifetime Value copied from a Calculated Insight object.

1. From Setup, in the Quick Find box, enter Permission Sets, and then open **Customer 360 Data Platform Integration**.
2. Select **Object Settings**.
3. Search for and click **Accounts**.
4. In the Object Permissions section, select **Read, Delete, View All**, and **Modify All**.
5. Repeat steps 3 and 4 for **Leads** and **Contacts**.
6. Save your changes.

### EDITIONS

Available in: Lightning Experience

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### USER PERMISSIONS

To view enrichments in Setup:

- View Setup

To view a specific enrichment:

- You must have access to the data space used in the enrichment. Set Salesforce Data Cloud permission set, such as Data Aware Specialist, feature permission to allow data space access.

To create or update enrichments:

- Customize Application AND
- Data Cloud User AND
- Write Access to Data Action AND
- Write Access to Data Space Definition

If you enabled enhanced security data spaces, you also need the permission Customize Data Actions on the Dataspace Scope.

## Enable Prospecting Center

To score your accounts and act on the most accurate and data-driven prospects, spending less time in analyzing your customers, enable Prospecting Center and Account Scoring. After Prospecting Center is connected, your data from Data Cloud is synced.

Make your selections based on your preferences on the Prospecting Center setup page, and then start using the Prospecting Center app.

1. In Setup, enter Prospecting Center in the Quick Find box, and then click **Prospecting Center**.
2. Click **Connect** to make sure that the data cloud is set up and connected. After Data Cloud is connected, your data is synced to the Prospecting Center app. You can also use data connectors to bring in your data from a third party.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To enable users to access High Velocity Sales app:

- Sales Engagement User

### Set Up Data Connections

Data cloud ingests, harmonizes, unifies, and analyzes data from connected data source to establish a shared source of truth about your customers.

**Connect Prospecting Center to Data Cloud** REQUIRED

[What's Data Cloud?](#)

In Progress | [Review](#)

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**Configure 3rd Party Data**

Set up and manage third-party data integrations.

[Configure](#)

---

**Configure Segments in Data Cloud** REQUIRED

Browse or create segments in data cloud.

[Configure](#)

3. Select the segments that are already created.  
From the Prospecting Center, Sales reps can see how marketing segments created in Data Cloud by their marketing team correspond to their accounts.
4. Locate the Configure Prospecting Center section.

## Configure Prospecting Center

**Select Unified Profile DMOs** REQUIRED

Assign a Unified Profile that are associated with the accounts. What is [Unified Profile](#)

---

**Select a Unified Account** Account1 | [Review](#)

Unified Account profile used to calculate Fit Score.

---

**Select a Unified Individual** Individual1 | [Review](#)

Unified Individual profile is used to calculate Engagement Score.

---

**Select Identity Resolution** Lead1 | [Review](#)

To associate leads with the accounts from your org, select an Identity Resolution

5. Click **Select** to add the respective Unified Account, Unified Individual DMOs, and Lead Identity Resolution.
6. To modify the selected DMOs, click **Review**.
7. Turn on **Prospecting Center**.

[Set Up Scoring Rules for Prospecting Center](#)

## Set Up Scoring Rules for Prospecting Center

Prioritize your work and spend time on prospects that are likely to be the best fit for you. You can set up Account Scoring only when you turn on Prospecting Center. When you set up scoring rules, you're defining the criteria based on which your Engagement, Fit, Intent, and your overall Account scores are calculated.

### [Define Account Rules](#)

The Account Score helps you analyze your next potential customer. The Account Score is calculated based on the Engagement, Fit, and Intent scores, based on the percentage weights provided.

### [Manage Engagement Rules](#)

The Engagement Score defines how actively the individuals in this account typically interact with your sales communications. A higher engagement score indicates a more interested customer. In Prospecting Center, you can add rules to define the Engagement score.

### [Manage Fit Rules](#)

The Fit score indicates how closely an account matches the characteristics of an ideal customer for your business. A higher Fit score indicates that this account aligns with the characteristics of your ideal customer profile. In Prospecting Center, you can add rules to define the Fit score.

### [Manage Intent Rules](#)

The intent score indicates buyers who are showing strong purchasing intentions based on their actions in the digital and physical worlds. A higher intent score signals the interest and readiness of the account to move forward in the buying process. In Prospecting Center, you can enable or disable the Intent score. By default, the intent score is disabled.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited Editions**, and available for an extra cost in **Professional and Enterprise Editions**. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

## Define Account Rules

The Account Score helps you analyze your next potential customer. The Account Score is calculated based on the Engagement, Fit, and Intent scores, based on the percentage weights provided.

Before you define the Account rules, make sure that Prospecting Center is enabled.

Here you can specify the overall impact of each score on the account score and adjust the Account Scoring criteria to score the accounts.

1. Go to the Prospecting Center setup page.
2. Click **Configure** next to Configure Account Scoring. The Scoring Rules page appears.
3. Adjust the Account Score slider to define the impact of the Engagement, Fit, and Intent Scores on the overall Account Score. By default, the Fit Score and Engagement Score is set to 50% each, and the Intent Score is disabled. You can choose to enable Intent Score based on your preferences.

### EDITIONS

Available in: Lightning Experience

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### USER PERMISSIONS

To enable users to access High Velocity Sales app:

- Sales Engagement User

The screenshot displays the 'Accounts' configuration page for 'Overall Score'. It includes an 'Enable Intent Score' toggle (checked), a weighted bar (30% Engagement, 30% Fit, 40% Intent), a calculation formula (30 + 30 + 40), and 'Based On' options (Maximum Engagement Score selected).

 **Note:** Make sure that the sum of the weights for the Engagement, Fit, and Intent scores is 100.

4. To save your changes, click **Publish**.

 **Example:** If you want the Engagement and the Fit Score to have equal impact and the Intent score to have a higher impact in calculating the Account Score, adjust the slider to 30% for the Engagement and the Fit Scores and 40% for the Intent Score.

[Manage Engagement Rules](#)

## Manage Engagement Rules

The Engagement Score defines how actively the individuals in this account typically interact with your sales communications. A higher engagement score indicates a more interested customer. In Prospecting Center, you can add rules to define the Engagement score.

Before you define the Engagement Score rules, make sure that Prospecting Center is enabled.

Add or modify the Engagement Score rules, by adding points to each criteria, to calculate an Engagement score.

1. Go to the Prospecting Center setup page.
2. Click **Configure** next to Configure Account Scoring.
3. To create an Engagement score rule, click **New rule** next to the Engagement Score Rules. You can add or modify the criteria on which the Engagement score is being calculated.
4. To edit or remove the points assigned to a specific criteria, click  next to a rule.

### EDITIONS

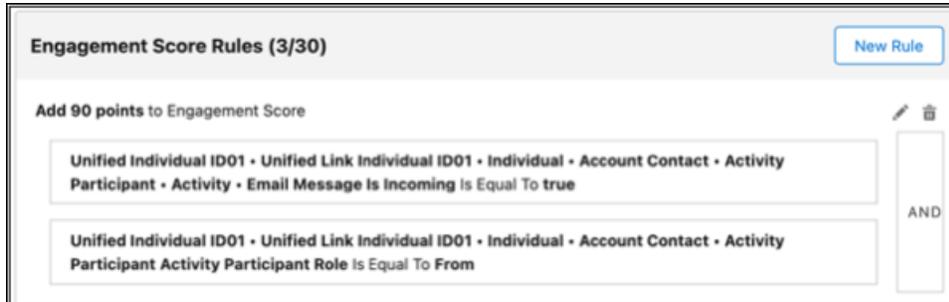
Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To enable users to access High Velocity Sales app:

- Sales Engagement User



**Engagement Score Rules (3/30)** New Rule

Add 90 points to Engagement Score

Unified Individual ID01 • Unified Link Individual ID01 • Individual • Account Contact • Activity Participant • Activity • Email Message Is Incoming Is Equal To true

Unified Individual ID01 • Unified Link Individual ID01 • Individual • Account Contact • Activity Participant Activity Participant Role Is Equal To From

AND

5. To save your changes, click **Publish**.

[Manage Fit Rules](#)

## Manage Fit Rules

The Fit score indicates how closely an account matches the characteristics of an ideal customer for your business. A higher Fit score indicates that this account aligns with the characteristics of your ideal customer profile. In Prospecting Center, you can add rules to define the Fit score.

Before you define the Fit Score rules, make sure that Prospecting Center is enabled.

Add or modify the Fit Score rules, by adding points to each criteria, to calculate a Fit score.

1. Go to the Prospecting Center setup page.
2. Click **Configure** next to Configure Account Scoring.
3. To create a Fit score rule, click **New rule** next to the Fit Score Rules. You can add or modify the criteria on which the Fit score is calculated.
4. To edit or remove the points assigned to a specific criteria, click  next to a rule.



**Fit Score Rules (4/30)** New Rule

**Add 30 points to Fit Score**  

Unified Account Account Type Is Equal To Prospect

**Add 90 points to Fit Score**  

Unified Account Account Type Is Equal To Investor

**Subtract 40 points from Fit Score**  

Unified Account Account Type Is Equal To Partner

**Add 70 points to Fit Score**  

Unified Account Created Date Is After 7/14/2024

5. To save your changes, click **Publish**.

[Manage Intent Rules](#)

### EDITIONS

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### USER PERMISSIONS

To enable users to access High Velocity Sales app:

- Sales Engagement User

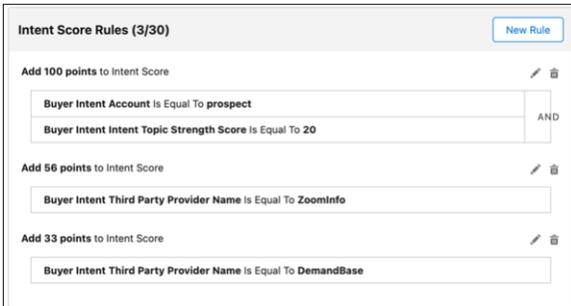
## Manage Intent Rules

The intent score indicates buyers who are showing strong purchasing intentions based on their actions in the digital and physical worlds. A higher intent score signals the interest and readiness of the account to move forward in the buying process. In Prospecting Center, you can enable or disable the Intent score. By default, the intent score is disabled.

Before you define the Intent Score rules, make sure that Intent Score and Prospecting Center are enabled.

Add or modify the Intent Score rules, by adding points to each criteria, to calculate a Intent score.

1. Go to the Prospecting Center setup page.
2. Click **Configure** next to Configure Account Scoring.
3. Enable the Intent Score.
4. Adjust the weights of the Engagement, Fit, and Intent scores to make the Total Weight 100.
5. Click **Done**.
6. To create an Intent score rule, click **New Rule** next to Intent Score Rules. You can add or modify the criteria on which the Intent score is being calculated.
7. To edit or remove the points assigned to a specific criteria, click  next to a rule.



8. To save your changes, click **Publish**.

[Give Users Access to Prospecting Center](#)

### EDITIONS

Available in: **Lightning Experience**

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To enable users to access High Velocity Sales app:

- Sales Engagement User

## Give Users Access to Prospecting Center

For sales reps to access the Prospecting Center app, assign the necessary user permissions and enable the Prospecting Center user app permissions.

1. Go to permission sets.
2. Clone any one of the permission sets.  
For example, you can clone Sales Engagement Cadence Creator, Quick Cadence Creator, or Sales Engagement User permission sets.
3. In the new permission set, enable the Prospecting Center User app permission.
4. Assign this new permission set so that the user can view the Prospecting Center App.

[Find Your Next Customer With Prospecting Center](#)

## Find Your Next Customer With Prospecting Center

Get an all-in-one view of your accounts and their scores, with multiple ways to find your next prospects, depending on how you want them to be categorized. You can prioritize them based on either segments or scores. You can see scores for all accounts or dive into each account for more details.

### Find Prospecting Center

Two ways to open Prospecting Center are available.

- Click the App Launcher, type Prospecting Center, and then click **Prospecting Center**. The Prospecting Center app opens in a new tab.

#### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

#### USER PERMISSIONS

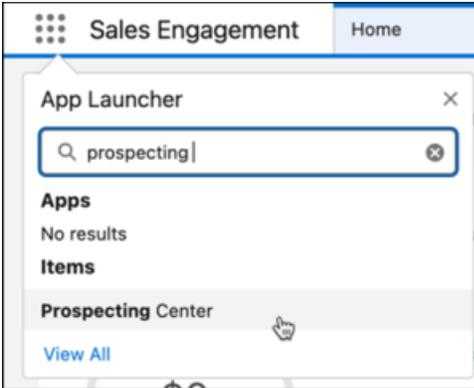
To enable users to access the Prospecting Center app:

- Prospecting Center User

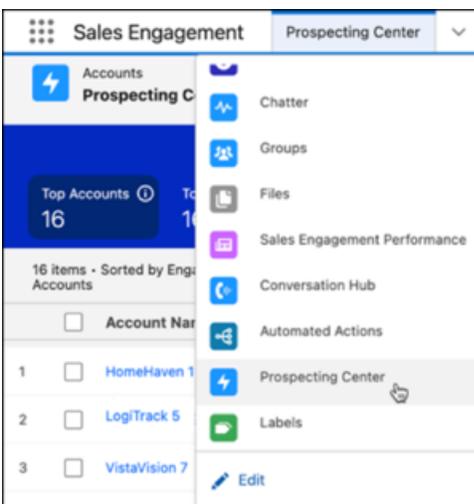
#### EDITIONS

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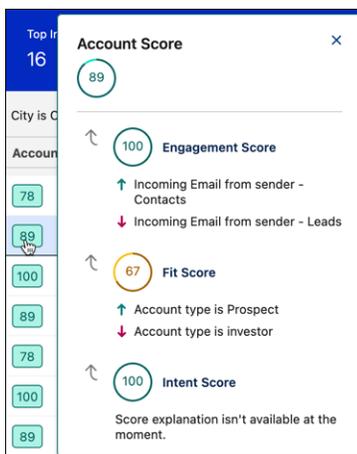


- From the Sales Engagement app, choose **Prospecting Center** from the Navigation menu.



## View Account Details

To view the details of an account, click  to open the details in a side panel. Prospecting Center shows only those accounts owned by you and your subordinates. To view details of all factors contributing to a score, click the score.



The Account score is an aggregate of Engagement, Fit, and Intent scores, based on your selections and the assigned % weights to each score.

### Engagement Score

This score indicates how actively the individuals in this account typically interact with your sales communications.

### Fit Score

This score indicates how closely an account matches the characteristics of an ideal customer for your business.

### Intent Score

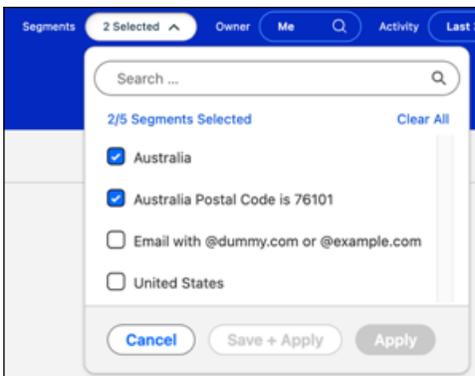
This score indicates buyers who are showing strong purchasing intentions based on their actions in the digital and physical worlds.

## Find Prospects by Segments

Segments are attributes of an account, based on which you can categorize your prospects. Segmenting your prospects helps you tailor strategies to direct your sales efforts in the right direction. Your sales teams can then use these segments to target their efforts, personalize their approach, and improve their overall sales performance.

**Important:** You can select up to five segments at a time.

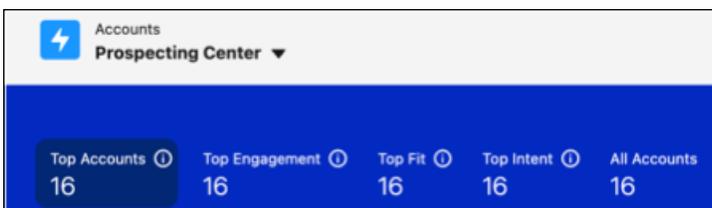
For example, if you're targeting manufacturing customers in California, you can create segments such as Manufacturing and California. By selecting these segments, you can focus your sales efforts on the customers who are most likely to be interested in your products or services.



**Note:** You can search and modify your segment selection at any time.

## Find Prospects By Scores

Scores help you find your best prospect, with just a click. Accounts with top scores can turn out to be your prospects.



**Tip:** Click each score to view all the factors contributing to that score.

 **Example:** To view prospects with the highest Intent score, click **Top Intent**, and all the accounts are sorted based on the Intent score. Similarly, you can sort the accounts based on Engagement, Fit, Intent, or even the Account Scores.

### Add Prospects to a Cadence

Adding a prospect to a cadence streamlines your outreach efforts by automating and scheduling communications, which make sure that follow-ups are consistent and timely without requiring manual effort for each interaction. This structured approach saves time, as it allows you to manage multiple prospects simultaneously with a uniform strategy.

## Add Prospects to a Cadence

Adding a prospect to a cadence streamlines your outreach efforts by automating and scheduling communications, which make sure that follow-ups are consistent and timely without requiring manual effort for each interaction. This structured approach saves time, as it allows you to manage multiple prospects simultaneously with a uniform strategy.

Make sure that Prospecting Center is enabled.

1. Click App Launcher, type Prospecting Center, and then click **Prospecting Center**.  
The Prospecting Center app opens in a new tab.
2. Find the prospect that you want to add to a cadence, either by segments or scores.
3. To add one prospect to a cadence:
  - a. Click  to open the account in the side panel.
  - b. Click **Add to Cadence**. All the related prospects appear.
  - c. Select the prospects that you want to add to a cadence.
  - d. Use the dropdown to select a cadence.
  - e. Click **Add**.
4. To add multiple prospects to a cadence:
  - a. Select all the prospects that you want to add to a cadence.
  - b. Click **Add to Cadence**.  
All related prospects appear.
  - c. Select the prospects that you want to add to a cadence.
  - d. Click **Next**.
  - e. Use the dropdown to select a cadence.
  - f. Click **Add**.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To enable users to access the Prospecting Center app:

- Prospecting Center User

To access the Sales Engagement app and create and edit Quick Cadences:

- Create and Edit Quick Cadences

## Streamline Prospect Outreach with Cadences

With cadences, inside sales reps can work through their prospects at top speed. Inside sales managers use Sales Engagement Cadence Builder to create consistent, scheduled cadences of outreach activities to help reps nurture their prospects with maximum efficiency. A cadence can include activities like sending emails, making calls, arranging meetings, and sending text messages. Sales managers and reps can add leads, contacts, and person accounts to each cadence. Sales reps act on the cadence activities from a prioritized work queue that shows them at a glance which prospects are ready for each outreach.

 **Note:** The High Velocity Sales name has changed to Sales Engagement. The automation features within the product now include customer engagement tracking, chatbots, cadences, and automated actions. The new name captures all the tools to use to automate processes and to engage strategically with leads and customers so that your sales team can focus on selling.

### [Build Cadences with Cadence Builder 2.0](#)

Cadence Builder 2.0 lets cadence creators build standard cadences sensitive to target engagement with much less effort and complexity. Creators use only three tracks—neutral, positive, and negative—to hold cadence steps appropriate to different target responses. Entry rules for each track let targets move to the appropriate track based on their responses, whenever they occur.

### [Build Cadences with Cadence Builder Classic](#)

The original tool for building cadences, Cadence Builder Classic, lets you create sales programs with email, call, LinkedIn, custom, screen flow, and branch steps. Branch steps let you send targets through different steps depending on their response to a previous step.

### [Create Call Scripts and Email Templates](#)

Use the Navigation Menu to create call scripts and email templates for your cadences.

### [Test Different Email Templates or Call Scripts on a Single Cadence Step](#)

Use cadence steps to test different versions of an email template or a call script to see which is most effective with target prospects. The cadence sends each email or displays each call script according to the proportions that you choose when you build the cadence.

### [Edit an Active Cadence](#)

When you want to improve a cadence, you can update an active cadence without interrupting sales outreach. Add and remove steps, update step names and descriptions, email template and call script variants, cadence rules, and more.

### [View Cadence Details](#)

View cadence details on the record home page. View cadence steps in Cadence Builder.

### [Add Prospects to a Cadence](#)

Take prospective buyers through a scheduled sales outreach sequence by adding them to a cadence.

### [Assign Prospects to a Different Sales Rep](#)

If you want to reassign in-progress cadence targets to a different rep, update the target assignee without removing the target from the cadence.

### [Remove Prospects from a Sales Engagement Cadence](#)

If you no longer want to target a prospect or you want to add them to a different cadence, remove them from their current cadence. You can remove one or all prospects from a cadence.

## EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### [Cadence Target Dispositions](#)

Cadences are a great tool for qualifying large numbers of leads and other prospects. Sales Engagement assigns a disposition to each prospect when they finish or exit a cadence. The disposition indicates how the target responded to the cadence, so you can see which targets to invest in further. You can view target dispositions in reports.

### [Deactivate a Sales Engagement Cadence](#)

When you're ready to update your sales outreach patterns, you can replace older cadences with new ones. Deactivating a cadence prevents further use, preserves cadence data, and avoids confusion with newer cadences. Existing targets in a deactivated cadence continue until completion.

### [Delete a Sales Engagement Cadence](#)

When you're finished using a cadence and its data, you can delete it. However, after you delete a cadence, you can't report on it. To continue reporting on a cadence you don't use, deactivate it rather than deleting it. Before deleting a cadence, you must remove all existing targets.

### [Use Cadences for a Commerce Reorder Portal](#)

A Commerce reorder portal provides a streamlined way to sell to repeat customers. After you create the reorder portal, you can configure a cadence with a preconfigured screen flow so that your reps can start inviting their contacts to place self-service reorders. You can use a standard cadence or a quick cadence.

### [Sales Engagement Cadence Examples](#)

Cadences make it easy to stay on schedule and ensure that prospects aren't forgotten. Review examples of cadences for various types of customer outreach. Then modify them to fit your own business requirements.

## Build Cadences with Cadence Builder 2.0

Cadence Builder 2.0 lets cadence creators build standard cadences sensitive to target engagement with much less effort and complexity. Creators use only three tracks—neutral, positive, and negative—to hold cadence steps appropriate to different target responses. Entry rules for each track let targets move to the appropriate track based on their responses, whenever they occur.

 **Note:** To watch a video demonstration of building a cadence with Cadence Builder 2.0, see [Cadence Builder 2.0](#).

### [Cadence Builder 2.0 Cadences](#)

Cadence Builder 2.0 cadences are responsive to target engagement, using three separate tracks—main, positive, and negative—to hold cadence steps appropriate to different target engagements. Entry rules for each track let targets move to the appropriate track based on their engagements, whenever they occur.

### [Compare Cadence Builder Classic and Cadence Builder 2.0](#)

Understand the differences between Cadence Builder Classic and Cadence Builder 2.0.

### [Example: A Simple Branched Cadence in Cadence Builder Classic and Cadence Builder 2.0](#)

See how a simple branched cadence looks in both versions of the Cadence Builder.

### [Create a Cadence with Cadence Builder 2.0](#)

Build sales programs that can respond to prospect engagement with Cadence Builder 2.0 cadences.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited Editions**, and available for an extra cost in **Professional and Enterprise Editions**. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

## Cadence Builder 2.0 Cadences

Cadence Builder 2.0 cadences are responsive to target engagement, using three separate tracks—main, positive, and negative—to hold cadence steps appropriate to different target engagements. Entry rules for each track let targets move to the appropriate track based on their engagements, whenever they occur.

 **Note:** To watch a video demonstration of building a cadence with Cadence Builder 2.0, see [Cadence Builder 2.0](#).

Cadence creators can build cadences with separate tracks, or series of steps, for targets of different levels of interest or engagement.

- A main track, usually with steps for targets who haven't yet engaged
- A positive track for targets who have engaged or shown interest
- A negative track for targets that have expressed a lack of interest

The builder canvas lets you see the steps in each track, drag steps to and from a track, and configure step details, all in one view.

Cadence creators can use each track in the way that makes sense for their team and can set rules to control when a target moves from one track to another. Targets can move from track to track at any time based on the track entry rules. For example, the positive track can have an entry rule that moves a target to that track when they click a link in an email sent in a previous step in either of the other two tracks.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

The screenshot displays the Cadence Builder interface for a cadence titled "Initiate Contact with New Prospects". The interface is divided into three main sections:

- Left Panel (Navigation):** Contains a "Cadence Overview" section and a list of "Cadence Tracks" (Main, Positive, Negative) and "Actions (8)" (Automated Email, Cadence Link, Custom Step, Make a Call, Manual Email, Screen Flow, Send Connection Request, Send InMail).
- Center Panel (Cadence Steps):** Shows a sequence of steps:
  - Main:** Description: "The default step sequence. Targets follow this track unless cadence rules move them to the positive or negative track."
  - Manual Email:** Step Type: Manual Email, Template: No template assigned, Start In: Immediately.
  - Positive:** Description: "The step sequence used when targets show signs of interest. Use cadence rules to move targets to this track."
  - Custom Step:** Step Type: Custom Task, Start In: Immediately.
  - Negative:** Description: "The step sequence used when targets show lack of interest. Use cadence rules to move targets to this track."
  - Automated Email:** Step Type: Automated Email, Template: No template assigned, Start In: Immediately.
- Right Panel (Form):** Contains a "Name" field with the value "Initiate Contact with New Prospects", a "Description" field, a "Folder" dropdown menu set to "My Private Cadences", and a "Choose Folder" button.

When track entry rules cause a target to move from one track to another, the cadence cancels the target's current step and moves the target to the first step of the new track. The start time of the first step is the later of the start time of the canceled step and the first step of the new track. This timing prevents the track change from causing two steps to occur closer together than the cadence designer intended. For example, if a target's current step on the main track starts in one day but an entry rule sends the target to a step that's set to start immediately, that new step starts in one day instead.

Cadence authors create steps and cadence exit rules in the same way in Cadence Builder 2.0 and Cadence Builder Classic.

## Considerations

Keep in mind these considerations when using Cadence Builder 2.0.

- Exit rules on the main track apply to all tracks. When an exit rule condition is met, the target leaves the cadence no matter which track they're on.
- Targets can move between tracks based on the track entry rules, but can't move back to a previously visited track.
- You can only use each specific engagement event in one entry or exit rule.
- We recommend planning your cadence steps from start to finish before beginning to build a cadence.
- You can connect multiple cadences with cadence links. Linked cadences can be used to implement more complex cadence engagement response scenarios.

## Compare Cadence Builder Classic and Cadence Builder 2.0

Understand the differences between Cadence Builder Classic and Cadence Builder 2.0.

 **Note:** Cadence Builder Classic (v1.0) will be retired in a future release. We recommend transitioning to Cadence Builder 2.0 for any new cadences your sales team needs to create. For more information, see [Cadence Builder 1.0 Retirement](#).

These are the features provided by each version of the Cadence Builder.

Feature	Cadence Builder Classic	Cadence Builder 2.0
Branching (responding to target engagements)	✔ Use rule and listener steps to branch based on call results and email engagements.	✔ Use track entry rules to change tracks based on call results or email engagements.
Rules	✔	✔
Listeners	✔	✔ Used in track entry rules
Manual steps	✔	✔
Automated Steps	✔	✔
LinkedIn steps	✔	✔
Custom steps	✔	✔
Autolaunched flows	✔	✔
Screen flow steps	✔	✔
Call script and email template variant testing	✔	✔
Linked cadences	✔	✔
Cadence record details visible in builder	✘	✔
Create and edit email template in email step card	✘	✔
Create and edit call scripts in call step card	✘	✔
Exit rules	✔	✔
Save cadences to any public or private folder	✔	✔

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

## Example: A Simple Branched Cadence in Cadence Builder Classic and Cadence Builder 2.0

See how a simple branched cadence looks in both versions of the Cadence Builder.

 **Note:** To watch a video demonstration of building a cadence with Cadence Builder 2.0, see [Cadence Builder 2.0](#).

This social engagement cadence uses an email reply as a favorable signal to connect on LinkedIn. The cadence includes nine steps that run over approximately 9 days.

In Cadence Builder Classic, the cadence includes these elements.

- Four decision branches
- Four listener steps listening for Email Reply engagement events
- Nine cadence actions
  - One manual email (1)
  - Three automated emails (2)
  - Four LinkedIn Connection Requests (3)
  - One custom step (4)
- Four different email templates

Each branch includes a listener step that listens for a reply to the previous email step. Each listener step sends the target to a LinkedIn Connection Request step if they reply.

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In Cadence Builder 2.0, targets enter at step one on the Main track.

- The Main track includes one manual email (1), three automated emails (2), and one custom step (3).
- The Positive track includes a single LinkedIn Connection Request step (4).

- Track entry rules on the Positive track move the target from the Main track to the Positive track if they reply to any of the emails sent (5).
- The cadence exit rules remove the target from the cadence if any of the emails bounce (6). Otherwise, targets exit the cadence when they complete the last step of the branch they're on.
- Step timing is set for each step in the same way as Cadence Builder Classic.
- The target can enter each track only once.
- No steps are needed on the Negative track because the cadence is only listening for a positive email reply engagement. If there's no engagement, the target stays on the Main track.



## Create a Cadence with Cadence Builder 2.0

Build sales programs that can respond to prospect engagement with Cadence Builder 2.0 cadences.

 **Note:** To watch a video demonstration of building a cadence with Cadence Builder 2.0, see [Cadence Builder 2.0](#).

1. In the Sales Engagement app, choose **Cadences** from the Navigation menu.
2. Click **New Cadence**.
3. Click **Open Cadence Builder 2.0**.
4. In the left panel, click **Cadence Overview**.  
In the right panel, enter a name and description for your cadence.
5. In the left panel, click **Main**.  
The Main track is usually used for targets that haven't yet engaged with your cadence.
6. Drag a step from the left panel to the Main track canvas.  
In the right panel, configure the details for the step.
7. Repeat with the remaining steps you want to add to the Main track.
8. In the left panel, click **Positive**.  
Use the Positive track for steps for targets who have engaged or shown interest.
9. Add and configure steps in the Positive track.
10. Repeat with the Negative Track.  
Use the Negative track for steps for targets who have shown a lack of interest.
11. In the left panel, click **Positive**. In the right panel, choose the engagement events you want to send a target to the Positive track.  
Calls generate the Meaningful Connect, Not Interested, Unqualified, Left Voicemail, and Call Back Later events. Emails generate the Reply, Open, and Link Click events.
12. In the left panel, click **Negative**. In the right panel, choose the engagement events you want to send a target to the Negative track.
13. In the left panel, click **Main**. In the right panel, choose the engagement events you want to send a target out of the cadence.
14. When you're finished, click **Save**.  
If you're ready to activate the cadence and being adding targets, click **Activate**.

You can perform these steps in whatever order is easiest for you.

### EDITIONS

Available in: Lightning Experience

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### USER PERMISSIONS

To create cadences:

- Sales Engagement Cadence Creator
- OR
- Sales Engagement Cadence Creator Included

## Build Cadences with Cadence Builder Classic

The original tool for building cadences, Cadence Builder Classic, lets you create sales programs with email, call, LinkedIn, custom, screen flow, and branch steps. Branch steps let you send targets through different steps depending on their response to a previous step.

### [Cadence Builder Classic Cadences](#)

Managers can build sales best practices right into Salesforce, optimizing prospecting outcomes. Cadences guide new and veteran reps alike through the prospecting and opportunity nurturing processes—including when to email a prospect, when to call, when to wait, and more. Managers can specify call scripts and email templates for each step, and create branched cadences with different outreach depending on the results of sales calls or emails.

### [Start Selling Fast with Included Cadences](#)

Sales managers and reps can start using cadences right away without building their own. Included cadences cover common sales scenarios and provide examples for sales managers to learn from and expand. Example call scripts and email templates for each cadence are also included.

### [Create and Activate a Cadence with Cadence Builder Classic](#)

Establish a repeatable process for your sales reps to work their prospects using a scheduled sequence of outreach activities with Sales Engagement cadences.

## Cadence Builder Classic Cadences

Managers can build sales best practices right into Salesforce, optimizing prospecting outcomes. Cadences guide new and veteran reps alike through the prospecting and opportunity nurturing processes—including when to email a prospect, when to call, when to wait, and more. Managers can specify call scripts and email templates for each step, and create branched cadences with different outreach depending on the results of sales calls or emails.

For reps, cadences bring together all their pending activities in one view and automatically log activities as reps complete them. After reps start using cadences, managers can report on which cadences result in the best sales outcomes.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

	NAME	LAST MODIFIED DATE	LAST MODIFIED BY	STATE
1	<a href="#">New Leads from Pardot</a>	9/18/2018 11:10 AM	Andy K	Active
2	<a href="#">Central Region Leads</a>	10/4/2018 4:45 PM	Andy K	Draft
3	<a href="#">Leads from Pardot</a>	10/3/2018 1:36 PM	Andy K	Draft
4	<a href="#">Reengagement - Cold</a>	10/2/2018 8:46 AM	Andy K	Draft
5	<a href="#">West Region Leads</a>	10/1/2018 9:16 PM	Andy K	Draft
6	<a href="#">Pacific Leads</a>	10/1/2018 10:55 AM	Andy K	Active
7	<a href="#">Holiday Campaign</a>	9/23/2018 10:12 PM	Andy K	Active
8	<a href="#">San Francisco Event</a>	9/27/2018 8:37 AM	Andy K	Draft

The Cadences tab (1) shows details for each cadence, including whether it is in draft, active, or deactivated (2). When in draft, a sales manager can edit the cadence. After the cadence is activated, the sales manager can assign leads, contacts, and person accounts to the cadence.

TARGET NA...	TARGET TYPE	STEP NAME	CREATED DATE
<a href="#">A. Bryan Eve...</a>	Lead	step 1 email	12/3/2018 5:5...
<a href="#">Amy Jo Ann ...</a>	Lead	step 1 email	12/3/2018 3:3...
<a href="#">A. Hemingw...</a>	Lead	step 1 email	12/3/2018 3:2...
<a href="#">A. J Fumerton</a>	Lead	step 1 email	12/3/2018 3:2...
<a href="#">Adam U Klei...</a>	Lead	step 1 email	12/3/2018 3:2...
<a href="#">Adita Stengall</a>	Lead	step 1 email	12/3/2018 3:2...

On the cadence record detail page, the Cadence Targets related list shows the leads, contacts, and person accounts currently active in the cadence (1). The Cadence Targets list doesn't include targets that have completed the cadence or have an error. To see the details of each cadence step in the Cadence Builder, Managers can click **View Steps** (2).

**Cadence**  
**Western US Region: 2 Day Lead Prospecting Play**

State  
Active

**Related** Details

**Cadence Targets (0)**

**Cadence Steps (2)**

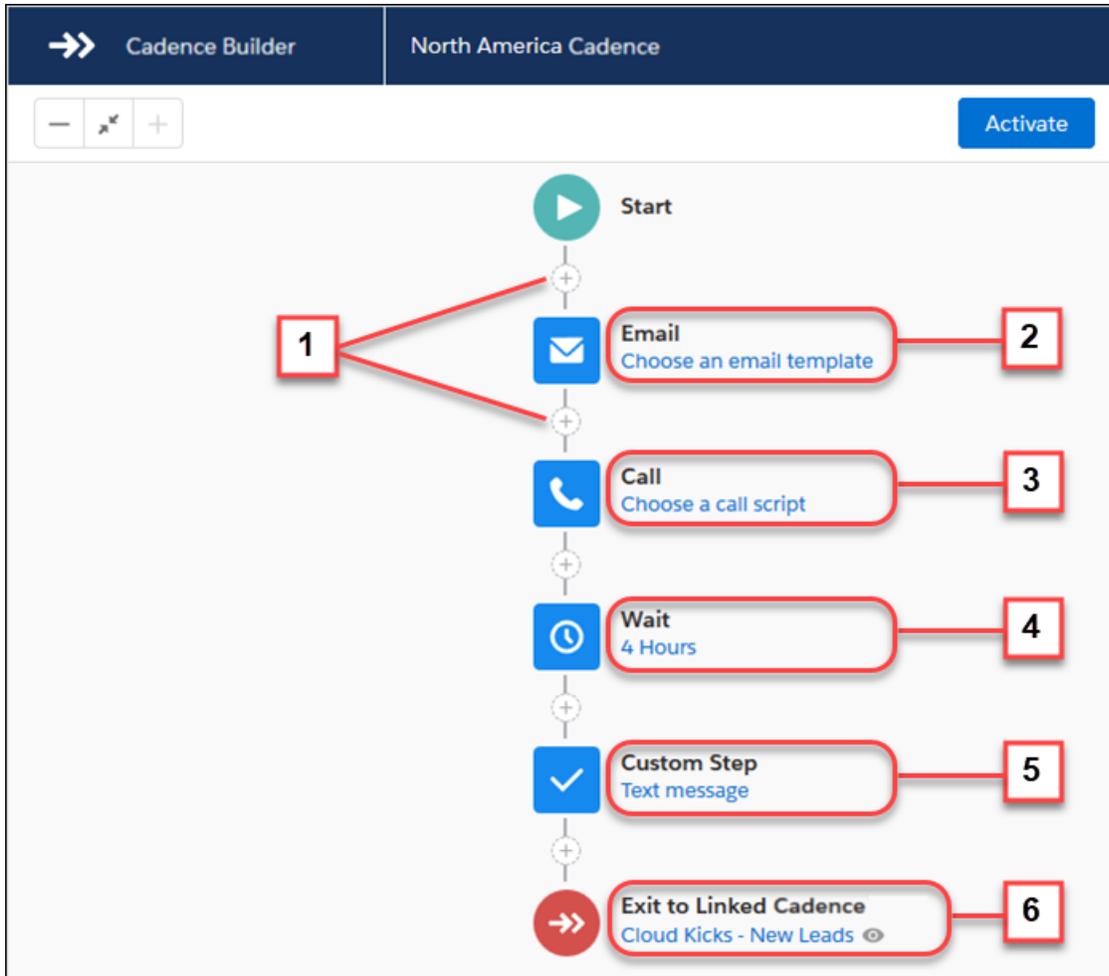
STEP TITLE	TOTAL CALLS	ALL EMAILS SENT	ALL EMAILS OPENED
Day 1 Reach Out	0	22	2
Day 2 Follow Up Call	10		

[View All](#)

The Cadence Steps related list shows the prospect engagement for each call and email step.

For example, a sales manager could build a cadence guiding reps to make two back-to-back calls, wait a half-day, and then call again or send an email.

Sales managers use the Cadence Builder to create each scheduled outreach plan.



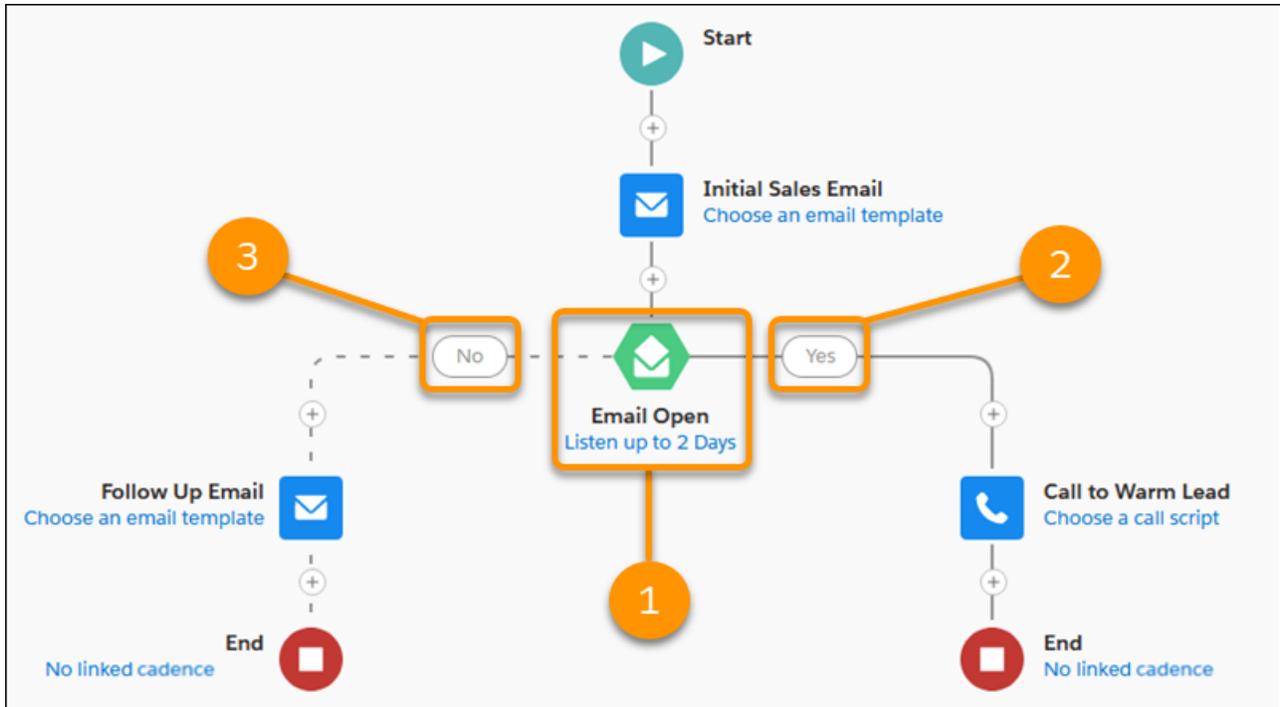
Click the plus (+) icons (1) to add an email (2), call (3), wait period (4), or a custom step (5), such as setting up a meeting or sending a text message. When prospects complete a cadence, you can add them to another one automatically (6).

To make your sales outreach more responsive to prospect engagement, you can build a branched cadence. Branches allow different outreach steps depending on the results of a call or an email.

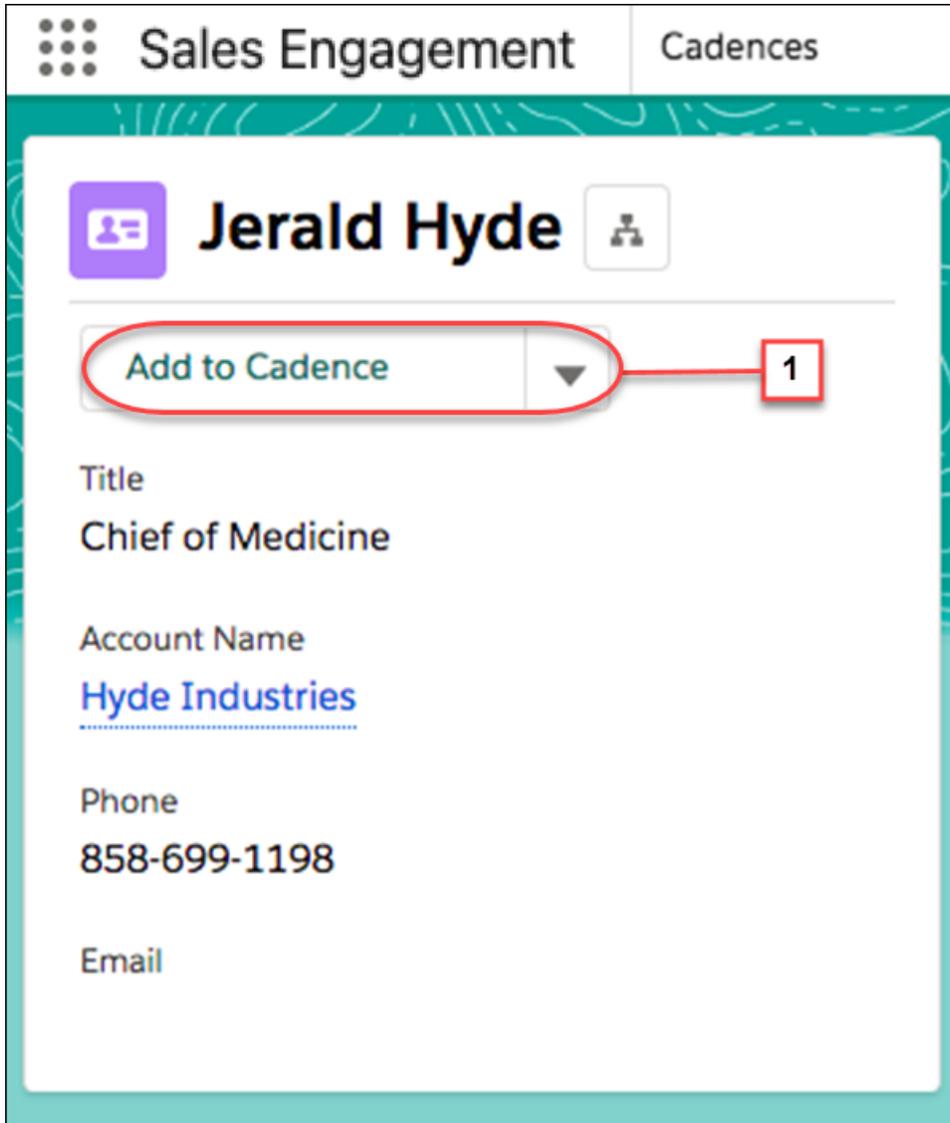


To build a cadence that takes prospects through different sales steps based on a call result, add a call step (1) followed by a branch step (2). For each call result branch step, choose which Call Outcome value to look for, such as Meaningful Connect or Left Voicemail (3).

Cadences can also take prospects through different sales steps based on whether the prospect engages with an email. Use a listener branch step (1) after an email to send the prospect down the correct branch.

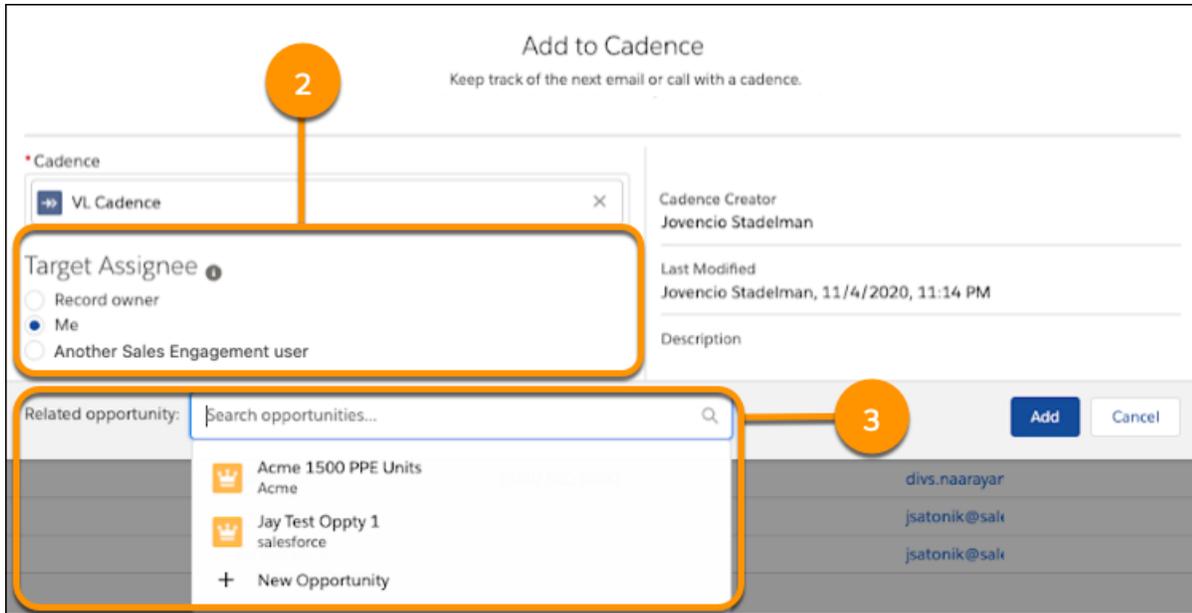


To create a branch based on email engagement, add a listener branch step (1) after an email step. The listener branch step waits to see whether the prospect opens the email or clicks a link in the email, and sends the prospect down the correct branch. If the prospect opens the email, the cadence takes them through the steps in the Yes branch. If they don't open the email, they follow the No branch.

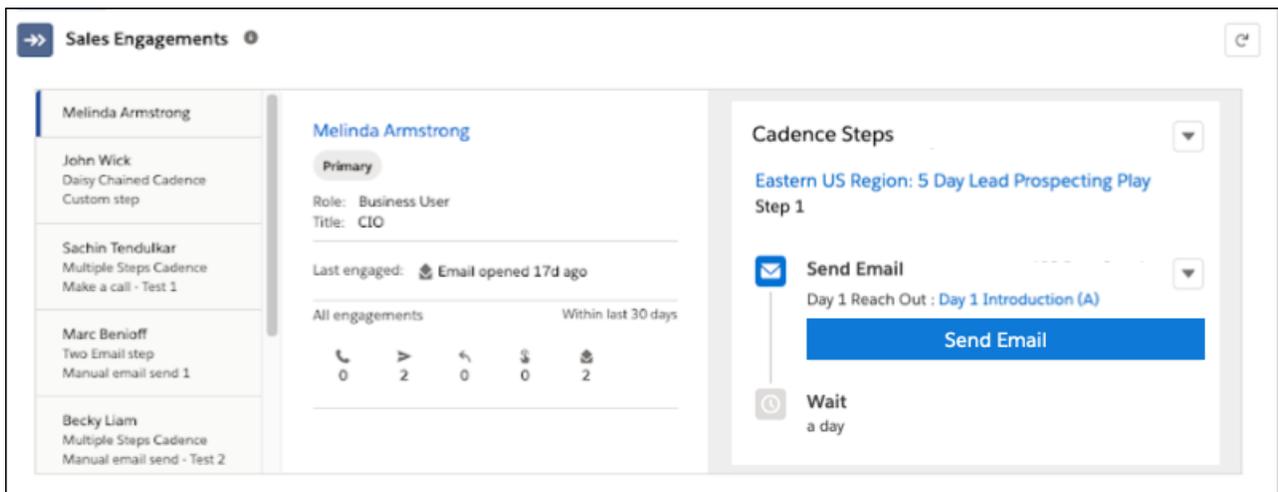


The screenshot shows the 'Sales Engagement' interface with a 'Cadences' tab. The main content area displays the profile of 'Jerald Hyde', Chief of Medicine at Hyde Industries. The phone number is 858-699-1198. The 'Add to Cadence' button is highlighted with a red circle, and a red line points from it to a red box containing the number '1'.

After a cadence is activated, sales managers or reps can add prospects right from a lead, contact, or person account detail page by clicking the **Add to Cadence** action (1). Then choose a cadence to start the prospect on a specific set of scheduled outreach. Choose a target assignee (2) to perform the sales outreach for the prospect. If the target is a contact on an opportunity, you can add the related opportunity (3). The cadence outreach steps appear automatically in the target assignee's work queue as they come due. The record owner is the default target assignee.



When your Salesforce admin adds the Sales Engagements component to lead, contact, and person account page layouts, sales reps and managers can see prospect engagement activity and cadence progress. Sales reps can act on the next sales step right from the record detail page.



SEE ALSO:

- [Create and Activate a Cadence with Cadence Builder Classic](#)
- [Add Prospects to a Cadence](#)

## Start Selling Fast with Included Cadences

Sales managers and reps can start using cadences right away without building their own. Included cadences cover common sales scenarios and provide examples for sales managers to learn from and expand. Example call scripts and email templates for each cadence are also included.

Managers can use the included cadences as is or as inspiration for more customized sales sequences.

The Cadences from Salesforce folder contains these cadences:

- **Initiate Contact with New Prospects**—Reach out to new leads to gauge their level of interest. 14 days.
- **Recover a Lost Opportunity**—Reach out occasionally to contacts on lost opportunities to see if they may be open to reengaging. 18 days.
- **Reengage Dormant Prospects**—Reach out to reengage prospects you haven't heard from in a while. 13 days.
- **Follow Up on Interested Prospects**—Respond to prospects who have expressed interest. 10 days.
- **Set Up a Meeting**—Step through scheduling a meeting. Includes initial outreach, negotiating timing, sending materials for review, conducting the meeting, and follow up. 2 days.
- **Nurture Existing Customers**—Let existing accounts know you're thinking about them and available to address their needs. Six months.
- **Follow Up with Prospects from Event**—Engage with prospects that expressed interest at an event. 8 days.
- **Onboard New Customers**—Handhold new customers to make sure they're engaged with your product and assist with any questions. 90 days.
- **Nurture Accounts Through Sales Rep Transition**—Ensure existing customers feel comfortable during the transition to a new account representative. 16 days.
- **Nurture Accounts Through Renewal**—Handhold existing customers through the renewal process to address any obstacles or concerns. 80 days.

To start using an included cadence, activate it and then begin adding targets.

### EDITIONS

Available in: **Lightning Experience**

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## Create and Activate a Cadence with Cadence Builder Classic

Establish a repeatable process for your sales reps to work their prospects using a scheduled sequence of outreach activities with Sales Engagement cadences.

1. In the Sales Engagement app, choose **Cadences** from the Navigation menu.
2. From the Actions menu, choose **New**.
3. Click **Cadence Builder Classic**.
4. Enter a unique name and a description for the cadence. Click **Save**. Cadence Builder opens.
5. To add a step, click the + icon.
6. On the Add Element card, choose the category of step to add.
  - To add a sales step, such as a phone call, email, or custom step, click **Action**.
  - To add a call result branch step after a call step, click **Rule**.
  - To add an email engagement branch step after an email step, click **Listener**.
7. For an action step, choose the type of sales outreach to add.
  - Call—Name the call step. Choose a call script if you want sales reps to use a script during their conversation. The call script appears automatically when a sales rep initiates the call from their Work Queue. Create your call scripts before using them in a cadence.
  - Email—Choose whether to send the email automatically or manually. Automatic emails don't require any action by the sales rep. For each email step, choose whether to thread the email with previous emails from the cadence. Next, name the email step.
    -  **Note:** When a cadence step specifies a threaded email, a Salesforce email address is added in the **BCC** field, except when emails are sent using Send Through Salesforce. Sales reps can see the BCC address in their email application's Sent Items folder.
  - Choose an email template if you want sales reps to use specific language in the email. The email template appears automatically when a sales rep initiates the email from their Work Queue. Create your email templates before using them in a cadence. To perform the step, sales reps must have access to the email template. Email templates used in cadences must have a blank Related Entity Type value and can only use merge fields for Sender, Recipient, or Organization.
  - When reps send manual emails to leads and contacts, they can schedule the emails so that they arrive at an optimal time.
  - Use the Start This Step field on action steps to separate automated email steps by at least 24 hours.
  - LinkedIn Step—Choose either an InMail step or a Connection Request step. For an InMail step, you can choose an email template to use for the InMail. The template appears when the sales rep begins the step. To perform the step, sales reps must have access to the email template.
  - Custom Step—Name the step. A custom step can be anything you want your sales reps do on a schedule. For example, send a text message, LinkedIn InMail, or Facebook message, plan a meeting, or send a brochure.

Sales reps see the name that you enter for each sales step in their Work Queue.

For a call results branch step, click **Call Result**. When sales reps perform the preceding call step, the Call Result field stores the result automatically. Then choose the Call Result value to look for. When you create a branch step, a Yes and a No path appear. The cadence follows the Yes path when the call outcome matches the value you chose. Otherwise the cadence follows the No path.

For an email engagement branch step, click **Email Open** or **Email Link Click**. Specify how long to wait for the prospect to engage, and whether to advance the cadence when the engagement occurs or only after the time expires. When you create a branch step, a Yes and a No path appear. The cadence follows the Yes path when prospect engages in the way you listen for. Otherwise the

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### USER PERMISSIONS

To create cadences:

- Sales Engagement Cadence Creator
- OR
- Sales Engagement Cadence Creator Included

cadence follows the No path. You can't add consecutive email engagement branch steps between an automated email step and another automated email step on a no branch.

A branch step can't be the last step.

8. To indicate how much time you want to pass between each step, use the Start This Step field on each action step.  
In Summer '23, when editing cadences, the Cadence Builder prompts you to replace wait steps with the Start This Step field in the next step. You can't save changes to cadences containing wait steps. In Winter '24, remaining wait steps will be automatically converted to hours in the Start This Step field on the action steps that follow each wait step. If you prefer, you can edit the Start This Step field to use days.
9. When you finish adding the details for a step, click **Save**.
10. Add more steps as needed for your sales outreach plan.  
The maximum number of steps is 100.
11. To send prospects to another cadence when they finish this one, click the **End** step. Turn on **Exit to linked cadence**, and then choose an active cadence. To see a preview of the linked cadence, click the  icon.  
For example, use linking to put prospects through one cadence when they're fresh, and a different cadence if they don't convert. If a target has a related opportunity, it stays with them in the linked cadence.
12. To remove prospects automatically from the cadence based on the results of calls or emails, click **Cadence Rules**. Then enable the exit criteria that make sense for your business.
13. When you're finished adding steps and are ready to start assigning prospects to the cadence, click **Activate**.  
If you leave Cadence Builder without activating, you can continue editing later by clicking **Modify Steps** on the cadence detail page.

#### [Add a Flow Automation to a Cadence Builder Classic Step](#)

You can execute a flow each time a rep completes a cadence step by adding a flow to the cadence step in Cadence Builder Classic. For example, you can update a contact owner, lead path, or opportunity stage.

#### [Use a Screen Flow as a Cadence Builder Classic Step](#)

In Cadence Builder Classic, you can specify a screen flow as a cadence step. Use screen flow steps to let reps create a case, event, or task or to perform another action. The screen flow runs when the sales rep initiates the step for a target from their Work Queue or the Sales Engagement component on target records. Use the Cadence Step Flow process type to create screen flows for cadence steps, or use the included flow templates.

#### SEE ALSO:

[Add Prospects to a Cadence](#)

[Adding Automation to Sales Engagement](#)

[Remove Prospects from a Sales Engagement Cadence](#)

[Create an Email Template in Lightning Experience](#)

## Add a Flow Automation to a Cadence Builder Classic Step

You can execute a flow each time a rep completes a cadence step by adding a flow to the cadence step in Cadence Builder Classic. For example, you can update a contact owner, lead path, or opportunity stage.

1. In Cadence Builder Classic, open the step where you want to add a flow. The step must be an action step, such as an email, call, LinkedIn, or screen flow step.
2. Enter the flow name in the Flow Automation field.

You can only add flows that are based on the Cadence Autolaunched Flow process type.

In Flow Builder, three cadence flow templates are included with Sales Engagement.

- Update Contact Owner: Update the contact and account owner to the current cadence target assignee.
- Update Lead Path: Update the lead status to Contacted.
- Update Opportunity Stage: If the related opportunity stage name is Prospecting, update it to Qualification.

To use a flow template, first clone it. Use the clone in cadences. You can also modify the clone if needed.

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### USER PERMISSIONS

To create sales cadences:

- High Velocity Sales Cadence Creator

OR

High Velocity Sales Cadence Creator Included

## Use a Screen Flow as a Cadence Builder Classic Step

In Cadence Builder Classic, you can specify a screen flow as a cadence step. Use screen flow steps to let reps create a case, event, or task or to perform another action. The screen flow runs when the sales rep initiates the step for a target from their Work Queue or the Sales Engagement component on target records. Use the Cadence Step Flow process type to create screen flows for cadence steps, or use the included flow templates.

1. In the Cadence Builder, to add a step, click the + icon. Then click **Action**.
2. Click **Screen Flow**.
3. Choose a screen flow from the list.  
You can only create screen flow steps from flows based on the Cadence Step Flow process type.
4. Add a name and description for the step.
5. Optionally, add a separate flow to run when targets complete the step. These flows must be based on the Cadence Autolaunched Flow process type.
6. Click **Save**.

With Sales Engagement, three cadence screen flow templates are included in Flow Builder.

- Create a Case
- Create a Task
- Create an Event

To use a flow template, first clone it. Use the clone in cadences. You can also modify the clone if needed.

## Create Call Scripts and Email Templates

Use the Navigation Menu to create call scripts and email templates for your cadences.

1. Click the Navigation Menu dropdown.
2. Select **Email Templates** or **Call Scripts**.

### EDITIONS

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### USER PERMISSIONS

To create sales cadences:

- High Velocity Sales Cadence Creator

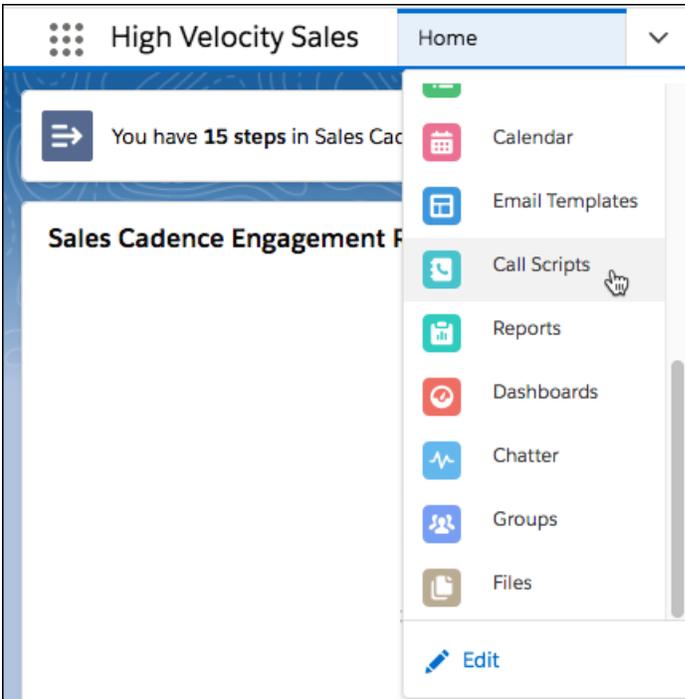
OR

High Velocity Sales Cadence Creator Included

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1,** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.



3. Create an email template or call script.

If you're using the Split View, click the action dropdown and select **New**.

Email templates used in cadences must be accessible to the sales rep. Store them in the public folder.

## Test Different Email Templates or Call Scripts on a Single Cadence Step

Use cadence steps to test different versions of an email template or a call script to see which is most effective with target prospects. The cadence sends each email or displays each call script according to the proportions that you choose when you build the cadence.

To use variant testing in a cadence, Allow Email Template and Call Script Variant Testing must be turned on in Sales Engagement Setup. In most cases, this setting is turned on by default.

From Sales Engagement Setup, turn on **Allow Email Template and Call Script Variant Testing**. When managers add an email or call step to a cadence, they can include up to three email templates or call scripts for the step. They can specify the percentage of targets that see or hear each variant.

1. Create a cadence or click **Modify Steps** on an existing cadence record.
2. In the Cadence Builder, add an email or call step.
3. Add the first email template or call script that you want to test.  
Sales reps who work with the cadence must have access to each email template or call script.
4. Click **Add Template Variant**.
5. Choose the second email template or call script that you want to test.
6. Add a third variant if needed.
7. For each variant, enter the percent of emails to send or calls to make with each variant.  
The total of your split percentages must equal 100%.

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### USER PERMISSIONS

To create and edit cadences:

- Sales Engagement Cadence Creator
- OR
- Sales Engagement Cadence Creator Included

Manual Email

Cancel

\* Email Name

Manual email send

Email Templates

Split ⓘ

+	Day 1 Introduction v.1	X	33%	▼
+	Day 1 Introduction v.2	X	33%	▼
+	Day 1 Introduction v.3	X	34%	▼

Add Template Variant

Description

Save

- Save your changes for the email or call step.

After you finish editing a new cadence, click **Activate**. If you're editing an active cadence, click **Update**.

-  **Note:** If a sales rep doesn't have access to the email template that's used for a step, an error appears in the Work Queue and on the target record. If you reassign the target to a different user with access, the error still appears, but the new assignee can send the email.

On the cadence record, the Engagement tab shows the amount of target engagement for each variant on each step.

Step: Manual email send Includes variant testing

Last 3 Months

### Engagement Over Time

Unique Opens

This chart shows data starting in July 2021. To see earlier data, your Salesforce admin can create the Sales Cadences & Steps with Monthly Metrics custom report type.

Time Period	HVS Template	Automated email template.
May 2021	0	0
Jun 2021	0	0
Jul 2021	1	6
Aug 2021	0	6

### Engagement Rates

This table shows data starting in July 2021. To see earlier data, your Salesforce admin can create the Sales Cadences & Steps with Monthly Metrics custom report type.

Template Name	Split...	Emails Sent	Delivery %	Unique Open %
Duncan's Email Template	34%	0		
HVS Template	33%	1	100%	
Automated email template.	33%	6	100%	

## Edit an Active Cadence

When you want to improve a cadence, you can update an active cadence without interrupting sales outreach. Add and remove steps, update step names and descriptions, email template and call script variants, cadence rules, and more.

1. Navigate to the cadence you want to edit.
2. Click **Modify Steps**.
3. In the Cadence Builder, make the needed changes.

When deleting a call result or email listener step, you can choose whether to delete the Yes or the No branch that follows it. Targets currently on deleted steps exit the cadence after completing the step.

4. When you are finished making changes to a step, click **Save** on the step.
5. When you are finished making changes, click **Update**. Your changes take effect immediately. If you close the Cadence Builder before clicking **Update**, your changes are lost.

### EDITIONS

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### USER PERMISSIONS

To edit a cadence:

- Sales Engagement Cadence Creator
- OR
- Sales Engagement Cadence Creator Included

## View Cadence Details

View cadence details on the record home page. View cadence steps in Cadence Builder.

To view details like the state, creator, last modified date, and list of target buyers, click the cadence in a list view.

To view the cadence steps in the Cadence Builder, from the record detail page, click **View Steps**.

To edit the cadence steps in the Cadence Builder, from the record detail page, click **Modify Steps**.

To view a call script or email template that's used in a cadence, click the script or template name.

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### USER PERMISSIONS

To view cadences:

- Sales Engagement User
- OR
- Sales Engagement User Included
- OR
- Sales Engagement Cadence Creator
- OR
- Sales Engagement Cadence Creator Included

Sales Cadence Steps (4)			
Step Title	Total Calls	All Emails Sent	All Emails Opened
Manual email send	0	4	13
Manual email send	0	3	9
Manual email send	0	2	1
Manual email send	0		

[View All](#)

The Cadence Steps related list shows you how many times emails were opened for each email step.

To see the list of targets currently active in the cadence, view the Cadence Targets related list. Targets that have completed the cadence or have an error aren't included in the list.

Use the Active Targets, Total Targets, Successful Completions, and Total Steps fields to see which cadences are used most by reps and which take the most targets through all the steps to completion. These fields are updated once per day.

## Add Prospects to a Cadence

Take prospective buyers through a scheduled sales outreach sequence by adding them to a cadence.

To add prospects from a record detail page:

1. Go to the detail page of a lead, contact, or person account you want to add to a cadence.
2. From the Actions menu, choose **Add to Cadence**.
3. Enter the cadence name.
4. For the Target Assignee, choose the record owner, yourself, or any other Sales Engagement user. The sales outreach steps for the prospect you're adding appear automatically in the assignee's work queue as they come due.
5. For cadences that are intended to nurture opportunities, add the target's pending opportunity to the Related To field.
6. For cadences that are intended to collect payment for invoices, add the target's pending invoice to the Related To field.
7. Click **Add**.

To add prospects from a list view, select up to 200 records and click **Add to Cadence**.

To add prospects from a report, adjust the report filters until only the records you wish to add are shown. Then click **Add to Cadence**. The report can include only leads, contacts, or accounts as the primary object, and can't include any grouping. Reports that include a secondary object don't support adding prospects to cadences. If you edit a report to meet these conditions, save and then run the report before adding prospects to a cadence.

To add more than 200 records from a report, add the cadence State field to the report and filter the results to exclude records with a cadence State of Active. This way the report shows only records that haven't yet been added to a cadence.

-  **Note:** You can add up to 200 prospects to a cadence at once. You can only add prospects to cadences you have access to. If you lose access to a cadence, you can't view lead, contact, or person account records assigned to the cadence in Salesforce Classic.

### EDITIONS

Available in: Lightning Experience

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### USER PERMISSIONS

To add prospects to cadences:

- Sales Engagement User or Sales Engagement User Included
- OR
- Sales Engagement Cadence Creator Included
- OR
- Modify All Data

## Assign Prospects to a Different Sales Rep

If you want to reassign in-progress cadence targets to a different rep, update the target assignee without removing the target from the cadence.

To change target assignees, your Salesforce admin must turn on **Change Cadence Target Assignees** in Sales Engagement Setup.

1. From the Work Queue or the prospect's lead, contact, or person account detail page, choose **Change Target Assignee** from the Actions menu.
2. Choose another Sales Engagement user with access to the cadence.

 **Note:** Changing the target assignee resets the due date for the current cadence step. Changing the assignee also cancels scheduled emails created by the previous assignee. To see this change in the Cadence Steps component, refresh the target's detail page.

### EDITIONS

Available in: Lightning Experience

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### USER PERMISSIONS

To change a target assignee:

- Sales Engagement User or Sales Engagement User Included
- OR
- Sales Engagement Cadence Creator Included
- OR
- Modify All Data

## Remove Prospects from a Sales Engagement Cadence

If you no longer want to target a prospect or you want to add them to a different cadence, remove them from their current cadence. You can remove one or all prospects from a cadence.

Except for users with Modify All Data permission, you must be one of the following to remove a target from a cadence:

- The target assignee
- The owner of the target lead, contact, or person account record
- The creator of the cadence

Guest users can't remove targets from cadences.

To remove a single prospect from their assigned cadence:

1. Go to the lead, contact, or person account detail page of the prospect you want to remove.
2. From the Actions menu, choose **Remove From Cadence**.
3. Choose a disposition for the target. The disposition indicates the result of the cadence for that target.
4. For cadences used to nurture opportunities, you can add or update a related opportunity for the target.

To remove all prospects from a cadence, from the cadence detail page, go to the Cadence Targets related list. Then click **Remove up to 200 Targets** until all prospects are removed.

To remove prospects from a list view, select up to 200 records and click **Remove from Cadence**.

To remove prospects from a cadence from a report, adjust the report filters until only the records you wish to remove are shown. Then click **Remove from Cadence**.

 **Note:** You can remove up to 200 prospects from a cadence at once.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To remove prospects from a cadence:

- Sales Engagement User or Sales Engagement User Included
- OR
- Sales Engagement Cadence Creator Included
- OR
- Modify All Data

## Cadence Target Dispositions

Cadences are a great tool for qualifying large numbers of leads and other prospects. Sales Engagement assigns a disposition to each prospect when they finish or exit a cadence. The disposition indicates how the target responded to the cadence, so you can see which targets to invest in further. You can view target dispositions in reports.

Cadence targets receive one of these dispositions when they exit a cadence.

Disposition	Description
Success	The sales rep successfully connected with the target. The customer shows interest in moving ahead with a deal.
Customer Engaged	The target opened an email, or clicked a link in an email.
Customer Connected	The target replied to an email or the call outcome was Meaningful Connect.
Contact Later	The target should be contacted again later.
No Response	The target didn't respond.
Not Interested	The target isn't interested
Disqualified	The target doesn't meet your buyer qualifications.
Bad Data	The target's Email, Phone, Name, or Company isn't valid.
Duplicate	The target is a duplicate record.

Cadence targets can receive a disposition automatically or manually.

### Automatically

Targets can exit a cadence automatically in a few ways.

- When a lead target converts, the assigned disposition is Success.
- When the last action of the cadence is a call, the assigned disposition is based on the call result.

Call Result	Disposition
Meaningful Connect	Customer Engaged
Left Voicemail	Contact Later
Call Back Later	Contact Later
Not Interested	Not Interested
Disqualified	Disqualified

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Depending on your Computer Telephony Integration (CTI), administrators can customize these call result mappings. For more information, see [Define Call Result Values for Cadence Branching](#).

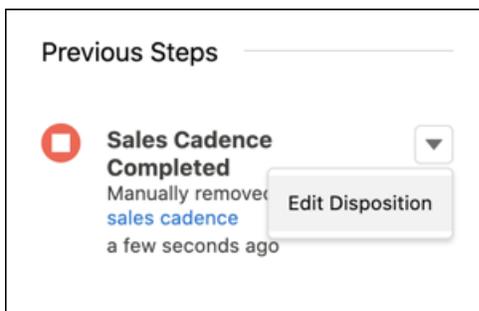
- If the last action of the cadence is an email and it's followed by a listener step, the assigned disposition is based on the results of the email.

Email Engagement	Disposition
Reply	Customer Connected
Link clicked	Customer Engaged
Open	Customer Engaged
Out of Office	Contact Later
Bounce	Bad Data

If there isn't a listener step after the email, the target completes the cadence and a disposition isn't assigned.

### Manually

When a sales rep removes a target from a cadence, they can assign a disposition at the same time. Sales reps can update the disposition in the Sales Engagement component on the target's lead, contact, or person account record.



You can view target dispositions in standard and custom reports.

- Add the Disposition field to the Cadence Completion Reason report.
- Create a report from any of the custom report types that include cadence trackers.

### SEE ALSO:

[Build Your Own Custom Reports for Sales Engagement](#)

## Deactivate a Sales Engagement Cadence

When you're ready to update your sales outreach patterns, you can replace older cadences with new ones. Deactivating a cadence prevents further use, preserves cadence data, and avoids confusion with newer cadences. Existing targets in a deactivated cadence continue until completion.

On the Cadences page, select the cadence you want to deactivate, and then choose **Deactivate** from the Actions menu.

### EDITIONS

Available in: Lightning Experience

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### USER PERMISSIONS

To deactivate a cadence:

- Sales Engagement Cadence Creator
- OR
- Sales Engagement Cadence Creator Included

## Delete a Sales Engagement Cadence

When you're finished using a cadence and its data, you can delete it. However, after you delete a cadence, you can't report on it. To continue reporting on a cadence you don't use, deactivate it rather than deleting it. Before deleting a cadence, you must remove all existing targets.

1. Remove all targets from the cadence.
2. On the Cadences page, select the cadence you want to delete, and then choose **Delete** from the Actions menu.

### SEE ALSO:

[Remove Prospects from a Sales Engagement Cadence](#)

### EDITIONS

Available in: Lightning Experience

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### USER PERMISSIONS

To delete a cadence:

- Sales Engagement Cadence Creator
- OR
- Sales Engagement Cadence Creator Included

## Use Cadences for a Commerce Reorder Portal

A Commerce reorder portal provides a streamlined way to sell to repeat customers. After you create the reorder portal, you can configure a cadence with a preconfigured screen flow so that your reps can start inviting their contacts to place self-service reorders. You can use a standard cadence or a quick cadence.

1. In the Sales Engagement app, go to the detail page of the contact that you want to invite to use the reorder portal.

Each contact that you add to the reorder portal must have a unique email address. The contact's email address is set as their username for the reorder portal. If another user has the same email address, you can't complete the invitation.

2. From the Actions menu, select **Add to Cadence**.
3. Fill out the cadence details.
  - a. For the cadence (1), enter and select **Quick Cadence: Invite Contact to Reorder Portal**. Or, to use a standard cadence, enter and select **Invite Contact to Reorder Portal**.
  - b. For the target assignee (2), choose the user who monitors the cadence steps for the prospect that you're adding.  
You can assign the record owner, yourself, or any other Sales Engagement user. The cadence steps for the prospect that you're adding appear in the assignee's work queue as they come due.
  - c. Click **Add** (3).

### EDITIONS

Available in: Lightning Experience

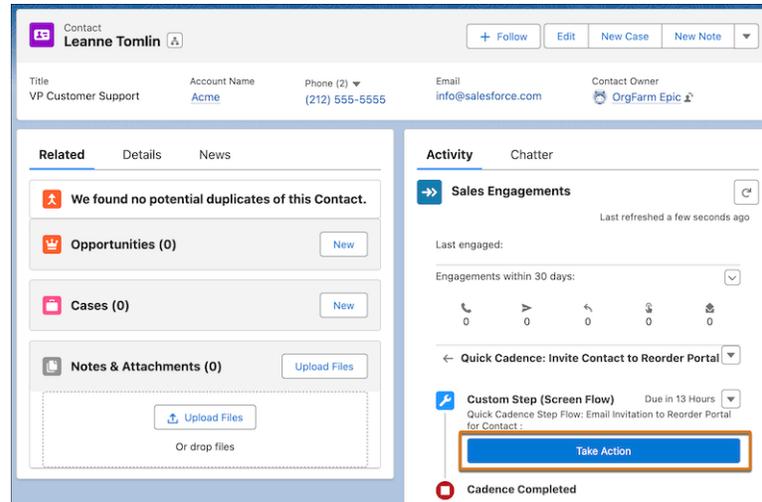
Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited Editions**, and available for an extra cost in **Professional and Enterprise Editions**. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

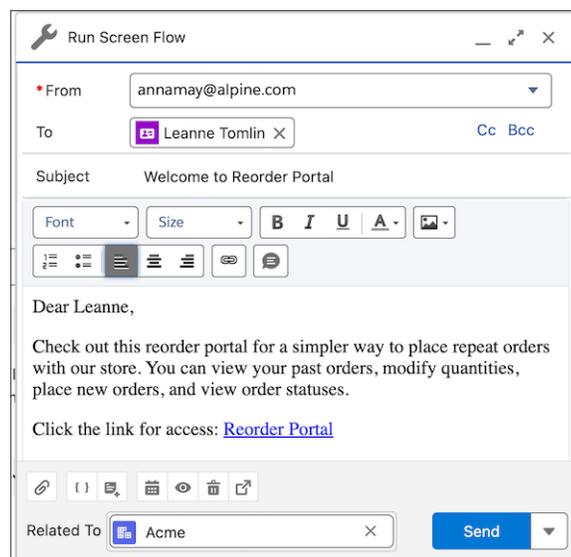
To add prospects to cadences:

- Sales Engagement User
- OR
- Sales Engagement User Included

4. From the Sales Engagement component on the record detail page, the target assignee can launch the cadence by clicking **Take Action**.



5. From the reorder portal dropdown list, select your reorder portal.
6. To view the product pricing displayed to the contact, click **Review Pricing**.  
If the contact is the first user of their account's reorder portal, the last purchase price of each product determines the pricing. After the initial invitation, the price book assigned to the account determines the pricing. You can manage pricing in the Commerce app. See [Price Books](#).
7. To continue to the email composition screen, click **Invite**.
8. Customize the invitation email. The default email is created based on the Commerce Reorder Portal: Invitation template. When you're done, click **Send**.  
You can also use Einstein to generate a draft of the invitation email.



SEE ALSO:

[Sell with a Commerce Reorder Portal](#)

## Sales Engagement Cadence Examples

Cadences make it easy to stay on schedule and ensure that prospects aren't forgotten. Review examples of cadences for various types of customer outreach. Then modify them to fit your own business requirements.

### Contacts at Strategic Accounts

For your most important accounts, consider calling every two days.

1. Call
2. Wait 2 days
3. Call
4. Wait 2 days
5. Call
6. Repeat

### Contacts at High Priority Accounts

For your important but not your most important accounts, consider calling every 25 days.

1. Call
2. Wait 25 days
3. Call
4. Repeat

### Contacts at Average Accounts

For your medium to low-priority accounts, consider calling every 50 days.

1. Call
2. Wait 50 days
3. Call
4. Repeat

### Leads with High Lead Score

Leads that Einstein Lead Scoring found have a high likelihood of converting get higher lead scores. For these leads, consider a more aggressive outreach.

1. Call
2. Wait 2 hours
3. Call a second time. If the lead doesn't answer, leave a voicemail and send an email.
4. Wait 2 days
5. Call
6. Wait 2 days
7. Call. If the lead doesn't answer, leave a voicemail and send an email.

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8. Wait 2 days
9. Call
10. Wait 2 days
11. Call

Repeat until the target is reached or the lead score falls below your chosen threshold for well-qualified leads.

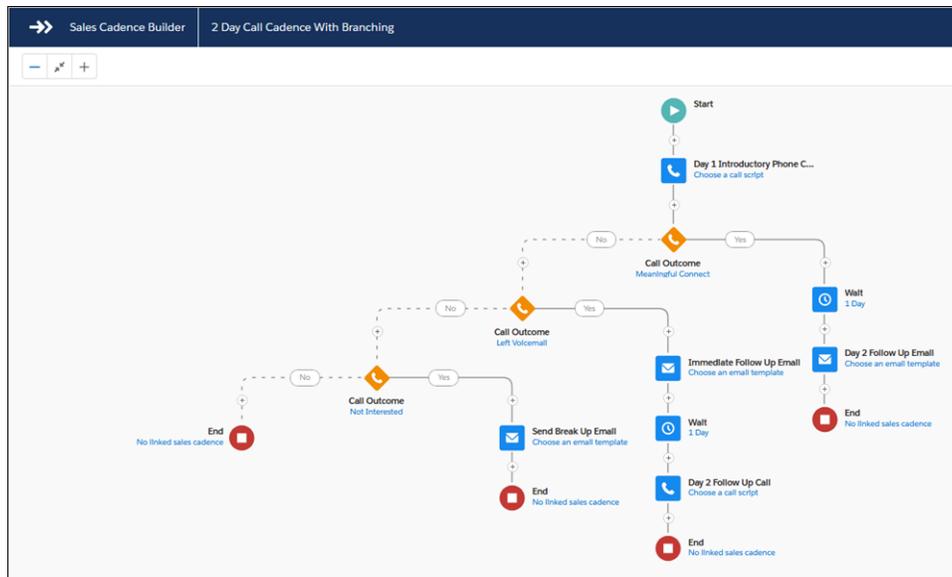
## Leads with Low Lead Scores

For leads that Einstein Lead Scoring found have a lower likelihood of converting, consider a less intensive outreach.

1. Call
2. Wait 2 hours
3. Call a second time. If the lead doesn't answer, leave a voicemail and send an email.
4. Wait 2 days
5. Call
6. Wait 4 days
7. Call. If the lead doesn't answer, leave a voicemail and send an email.

## Branched Cadence

Use a branched cadence when you want to perform different sales outreach depending on the outcomes of sales calls.



SEE ALSO:

[Create and Activate a Cadence with Cadence Builder Classic](#)

## Sell Faster with Sales Engagement

Understand how the Lightning Sales Console, Work Queue, Sales Dialer, Quick Cadences, Automated Actions, and other Sales Engagement features work together to help accelerate your sales.

 **Note:** The High Velocity Sales name has changed to Sales Engagement. The automation features within the product now include customer engagement tracking, chatbots, cadences, and automated actions. The new name captures all the tools to use to automate processes and to engage strategically with leads and customers so that your sales team can focus on selling.

### EDITIONS

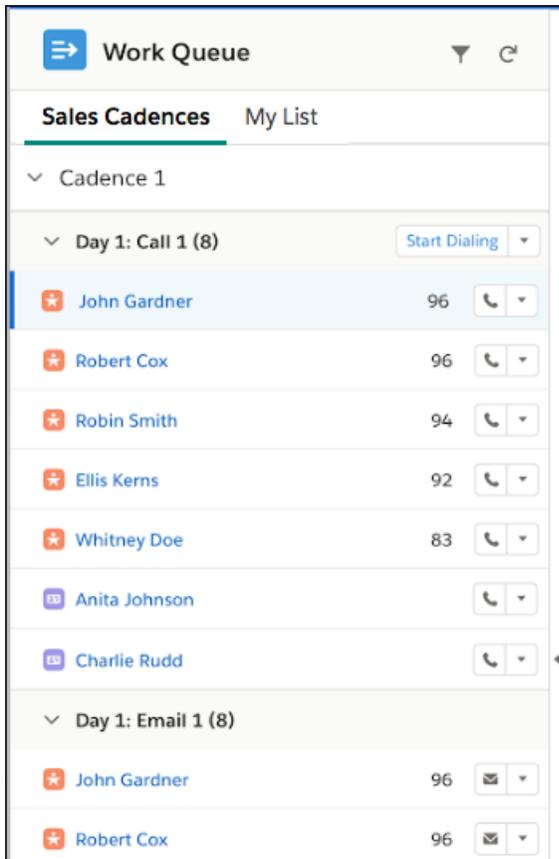
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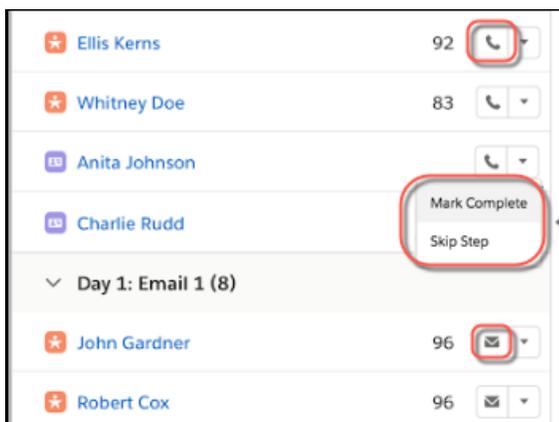
The console features a navigation-friendly, three-column layout that includes a highlights panel (1), the familiar workspace (2), and useful related lists (3). With the split view, your reps can see a list view while they view workspace tabs and subtabs, so they get everything they need in one workspace. You can customize the default layout for your company's business processes.

Reps can pin tabs such as Home (4) for easy access to useful content. Home provides reps an overview of what's waiting for them in the Work Queue. It can also be customized for users to show relevant reports and dashboards.

Your reps can get the most out of Sales Engagement with the Work Queue (5) in the split view. With the Work Queue, reps see a prioritized list of emails, calls, and tasks. These activities are defined by the cadences created by sales managers. And reps can also tackle their own list of one-off activities from My List.



If your company uses Einstein Lead Scoring, leads in the Work Queue are prioritized by lead score. Your reps can immediately tackle the leads that are most likely to convert based on artificial intelligence about your business's patterns of lead conversion. If Einstein Lead Scoring isn't active, records are sorted alphabetically.



Reps can take action directly from the Work Queue. They can click the phone icon to launch Sales Dialer from the console. Reps can send emails with the email action. And call scripts and email templates assigned to the cadence steps help reps power through each action

even more efficiently. If reps perform the task without using the Work Queue, they can also manually complete a step. And they can skip a step if it isn't relevant.

You can also expose the Work Queue in the Outlook and Gmail integrations by adding the component to an email integration pane.

Sales Engagement includes Einstein Activity Capture, so relevant events and emails are automatically associated with related records in Salesforce. Reps don't have to worry about manually logging different activities.

#### [Add Leads, Contacts, or Person Accounts to Your Work Queue with Cadences](#)

Add prospects to cadences from list views, record detail pages, or reports. When you add prospects to a cadence, the emails, calls, and other tasks defined in the cadence appear in the Cadences tab of the target assignee's Work Queue. You can also add separate activities not directly related to a cadence. These tasks appear on the My List tab of the Work Queue.

#### [Simplifying Outreach Tasks with Quick Cadences](#)

With quick cadences, you can create personal communication templates to save time by easily adding your own outreach steps to your To Do List and Work Queue. Create quick cadences for calls, emails, LinkedIn InMail, and custom steps. Then assign leads, contacts, and person accounts to a quick cadence to take action later.

#### [Prioritize Sales Outreach Based on Prospect Engagement](#)

Find out immediately when cadence targets engage with emails. Engagement alerts for email opens, replies, bounces, and link clicks appear in the My Feed tab of the Work Queue. Alerts about record assignments are also included for Sales Engagement users. Engagement data also appears on target records and email messages.

#### SEE ALSO:

[Start Using the Sales Engagement App](#)

## Add Leads, Contacts, or Person Accounts to Your Work Queue with Cadences

Add prospects to cadences from list views, record detail pages, or reports. When you add prospects to a cadence, the emails, calls, and other tasks defined in the cadence appear in the Cadences tab of the target assignee's Work Queue. You can also add separate activities not directly related to a cadence. These tasks appear on the My List tab of the Work Queue.

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### USER PERMISSIONS

To use Sales Engagement:

- Sales Engagement User or Sales Engagement User Included
- OR
- Sales Engagement Cadence Creator Included

The screenshot shows a Salesforce list view titled 'Leads Hot Leads'. It displays a table with 5 items selected. The table columns are NAME, TITLE, COMPANY, and PHONE. An actions dropdown menu is open over the table, showing options: Change Status, Change Owner, Add to Sales Cadence, Remove From Sales Cadence, Send List Email, and Add to My List.

	NAME ↑	TITLE	COMPANY	PHONE
1	<input checked="" type="checkbox"/> Darla Rio	VP Operations	Bodell Construction	(710) ...
2	<input checked="" type="checkbox"/> Gail Kaczor	Chief Marketing Officer	Boxes Unlimited	(318) ...
3	<input type="checkbox"/> Gwendolyn Royals	VP Purchasing	International Shipping Co.	(826) ...
4	<input checked="" type="checkbox"/> Keli Chance	VP Operations	TMC, Inc.	(805) ...
5	<input checked="" type="checkbox"/> Ken Bell	Chief Information Officer	Big Sky Laser	(233) ...

Add leads, contacts, or person accounts to your Work Queue from record detail pages, list views, or reports. If you're trying to add multiple records at once, it's easiest to add records from a list view or a report. In a list view, switch to a table view, select the records you want to add, and add records from the Actions dropdown menu.

To add leads, contacts, or person accounts from a report, the report can include only leads, contacts, or accounts as the primary object, and can't include any grouping. Reports that include a secondary object don't support adding prospects to cadences. If you edit a report to meet these conditions, save and then run the report before adding prospects to a cadence.

If you want to add a prospect to an existing cadence, select **Add to Cadence**.

If you want to add a separate call or email, select **Add to My List**.

You can add up to 200 records to a cadence at a time. To add more than 200 records from a report, add the cadence State field to the report and filter the results to exclude records with a cadence State of Active. This way the report shows only records that haven't yet been added to a cadence.

You can add a prospect to more than one cadence at a time. For example, you can use one cadence to sell new products and another to sell upgrades to an existing product.

The Total Cadences field on lead, contact, and person account list views shows how many cadences each prospect is assigned to.

## Simplifying Outreach Tasks with Quick Cadences

With quick cadences, you can create personal communication templates to save time by easily adding your own outreach steps to your To Do List and Work Queue. Create quick cadences for calls, emails, LinkedIn InMail, and custom steps. Then assign leads, contacts, and person accounts to a quick cadence to take action later.

By creating a quick cadence, you can customize your outreach, add follow-ups to your Work Queue and To Do List, and avoid repetitive work. When you create a quick cadence for a call or email, you can include a call script or email template. You can also set the quick cadence to repeat up to 10 times or until a specific engagement occurs. Then you can assign leads, contacts, and person accounts the quick cadence to remind yourself to perform the outreach later.

Quick cadences are different from standard cadences because they only have one step (which can be repeated up to 10 times) and can be created by any Sales Engagement user, not just managers.

For a video demonstration of creating a quick cadence, see [How Quick Cadences Help Sellers Automate the Mundane](#).

### [Create a Quick Cadence](#)

Easily remind yourself to reach out to prospects in specific ways with quick cadences. Create a quick cadence to send an email with a specific template or to make a call with a call script. To add the task to your Work Queue and To Do List, assign the quick cadence to a lead, contact, or person account.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and included in **Professional, Enterprise, Performance** and **Unlimited** Editions

Available in Sales Engagement with Sales Cloud, in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

## Create a Quick Cadence

Easily remind yourself to reach out to prospects in specific ways with quick cadences. Create a quick cadence to send an email with a specific template or to make a call with a call script. To add the task to your Work Queue and To Do List, assign the quick cadence to a lead, contact, or person account.

1. In the Cadences tab of the Sales Engagement app, click **New Cadence**.
2. Under Quick Cadence, select the type of outreach you want to include.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and included in **Professional, Enterprise, Performance** and **Unlimited** Editions

Available in Sales Engagement with Sales Cloud, in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To create quick cadences:

- Sales Engagement User AND Sales Engagement Quick Cadence Creator
- OR
- Sales Engagement User Included AND Sales Engagement Quick Cadence Creator
- OR
- Sales Engagement Cadence Creator
- OR
- Sales Engagement Cadence Creator Included
- OR
- Sales Engagement Basic

## New Cadence

Reach out to customers and prospects with targeted messaging.

### Quick Cadence

Create personal communication templates that you can quickly assign to your To Do List.

-  Make a Call
-  Manual Email
-  Custom Task
-  LinkedIn InMail
-  LinkedIn Connection Request

### Cadence Builder

Managers, guide your sales teams with a multi-step engagement program.

 Launch Builder

- Provide the details for the outreach. For example, enter a name, description, and optional template for an email.

## New Quick Cadence


Manual Email

**Name**

**Description**

**Email Template**

**Add an Automated Action?**  
When you're finished here, you can automate adding targets to this cadence.

Add Automated Action

Cancel
Save

4. Choose whether to repeat the quick cadence for assigned targets.  
Enter how often to repeat and how many times. You can set the quick cadence to stop repeating when a specific engagement occurs. For example, for a phone call, you can stop repeating when a call results in a meaningful connect.

### New Quick Cadence

 **Make a Call**

**\* Name**

Description

Call Script

**\* Start This Quick Cadence**

**\* Days**  **\* Start Time**

**\* Due Date**

**\* Repeat**

**\* Repeat Every**  **\* Period**

**\* Number of Repeats**

**Repeat Until**

<p>Available</p> <div style="border: 1px solid #ccc; padding: 5px;"><p>Not Interested</p><p>Unqualified</p><p>Left Voicemail</p><p>Call Back Later</p></div>	<p>▶</p> <p>◀</p>	<p>Chosen</p> <div style="border: 1px solid #ccc; padding: 5px;"><p>Meaningful Connect</p></div>
--	-------------------	--

**Add an Automated Action?**  
When you're finished here, you can automate adding targets to this cadence.

Add Automated Action

CancelSave

5. Click **Save**.

Your quick cadences are saved in your My Private Cadences folder in the Cadences tab of the Sales Engagement app.

6. Optionally, you can also create an automated action to add targets to the new quick cadence.

When you've created a quick cadence, assign prospects to it by selecting **Add to Cadence** from the Action menu on leads, contacts, and person accounts, or from list views and reports. The outreach task appears in your Work Queue and To Do List so you can follow up later.

You can't view the steps or clone quick cadences.

For a video demonstration of creating a quick cadence, see [How Quick Cadences Help Sellers Automate the Mundane](#).

 **Note:** If your Salesforce admin adds a required custom field to the Action Cadence object, you can't create quick cadences. If you see this error, ask your admin to create a validation rule for the custom field instead of setting the field as required.

## Prioritize Sales Outreach Based on Prospect Engagement

Find out immediately when cadence targets engage with emails. Engagement alerts for email opens, replies, bounces, and link clicks appear in the My Feed tab of the Work Queue. Alerts about record assignments are also included for Sales Engagement users. Engagement data also appears on target records and email messages.

 **Note:** The High Velocity Sales name has changed to Sales Engagement. The automation features within the product now include customer engagement tracking, chatbots, cadences, and automated actions. The new name captures all the tools to use to automate processes and to engage strategically with leads and customers so that your sales team can focus on selling.

### [View Prospect Engagement in the Work Queue](#)

Prioritize your sales outreach based on prospect engagement shown in the My Feed tab.

### [View Engagement on Lead, Contact, Account, and Opportunity Records](#)

Prioritize your sales outreach based on prospect engagement shown in the Sales Engagements component on lead, contact, person account, business account, and opportunity records.

### [View Engagement for Specific Emails on Lead, Contact, and Person Account Records](#)

On lead, contact, and person account records, when the activity timeline shows email activity, sales reps can access the engagement details for each tracked email.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited Editions**, and available for an extra cost in **Professional and Enterprise Editions**. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

## View Prospect Engagement in the Work Queue

Prioritize your sales outreach based on prospect engagement shown in the My Feed tab.

The My Feed tab of the Work Queue shows alerts when prospects engage with tracked emails, so you can follow up immediately. You can also see an alert when a record is assigned to you.

### EDITIONS

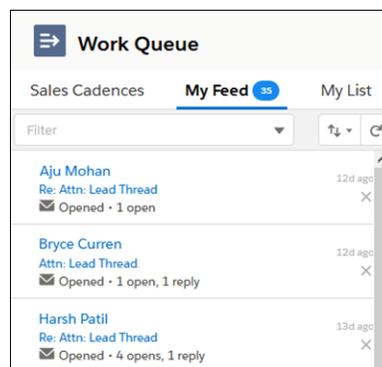
Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1,** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

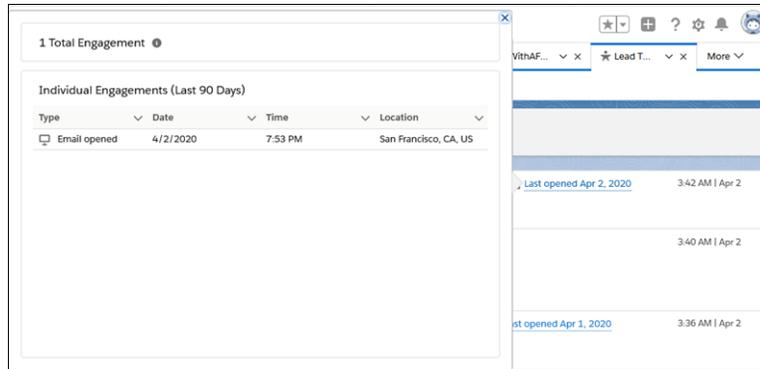
To view prospect engagement:

- Sales Engagement User or Sales Engagement User Included
- OR
- Sales Engagement Cadence Creator Included



The My Feed tab shows the last 30 days of engagements. Sales reps can sort and filter the list.

1. To view an email and its engagement details, click the email subject.



If you use Einstein Activity Capture, hovering over the **Last Opened Date** of an email shows the Engagement related list.

If you don't use Einstein Activity Capture, click the email subject and then the **Engagement** tab to see the list.

The Engagement list shows all engagements for the last 90 days. Sales reps see dates and times when recipients opened emails or clicked links, and how many times they interacted, in a chronological list. Use the engagement details to identify the most interested prospects for prompt follow-up.

## View Engagement on Lead, Contact, Account, and Opportunity Records

Prioritize your sales outreach based on prospect engagement shown in the Sales Engagements component on lead, contact, person account, business account, and opportunity records.

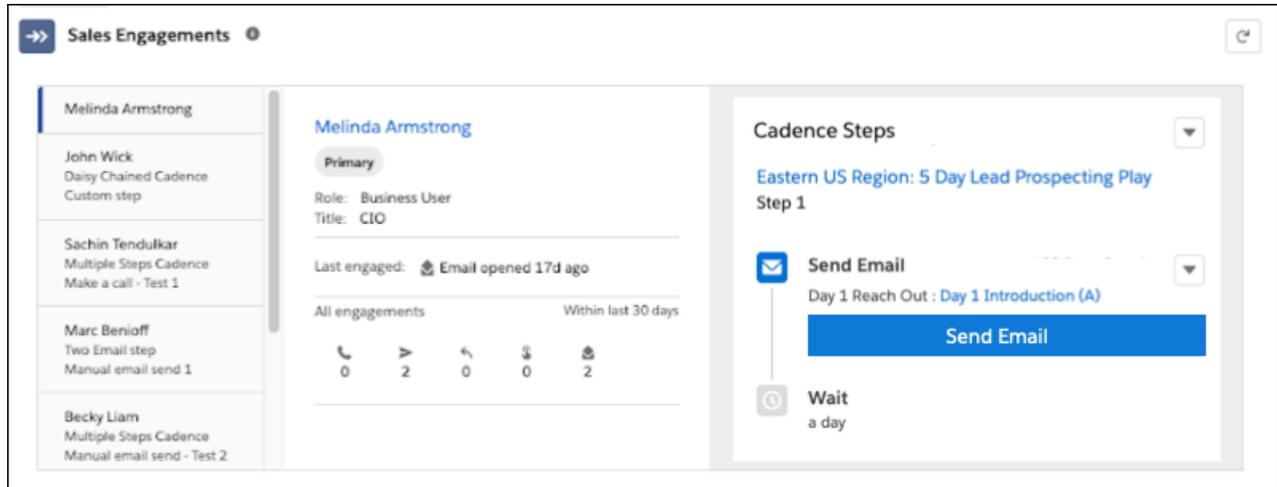
When prospects engage with emails and calls, you can see details in the Sales Engagement component. The component also shows prospects' recent and upcoming cadence steps.

On account records, the component shows engagement for each contact on the account.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance**, **Einstein 1**, and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.



## View Engagement for Specific Emails on Lead, Contact, and Person Account Records

On lead, contact, and person account records, when the activity timeline shows email activity, sales reps can access the engagement details for each tracked email.

To view the engagements, click **View full email**, and then hover over the **Last Opened Date** or click the email subject.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement, which is available for an extra cost in **Enterprise, Performance** and **Unlimited** Editions.

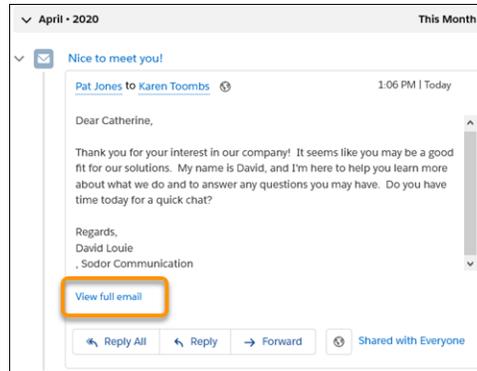
### USER PERMISSIONS

To view prospect engagement:

- Sales Engagement User or Sales Engagement User Included

OR

Sales Engagement Cadence Creator Included



## Analyze Sales Engagement Performance with Reports and Dashboards

Sales Engagement includes a set of standard reports and custom report types to show you the productivity and effectiveness of your cadences and reps. See even more detail with the Sales Engagement Performance Dashboards, powered by CRM Analytics.

### [Sales Engagement Reporting and Dashboards](#)

Sales Engagement dashboards and reports provide insight into cadence adoption and usage, statistics about sales outcomes and ROI, details on cadence and email success, and opportunities to enhance sales rep enablement and coaching.

### [CRM Analytics and Sales Engagement](#)

CRM Analytics, formerly known as Tableau CRM, is a cloud-based platform for connecting data from multiple sources, creating interactive views of that data, and sharing those views in apps. Sales managers can use performance dashboards in CRM Analytics to quickly see customer engagement and how sales reps are doing. For example, managers can view how many cadences are in progress, with detailed call and email response statistics. And they can see how effectively sales reps work through their cadences.

## Sales Engagement Reporting and Dashboards

Sales Engagement dashboards and reports provide insight into cadence adoption and usage, statistics about sales outcomes and ROI, details on cadence and email success, and opportunities to enhance sales rep enablement and coaching.

 **Note:** Sales Engagement stores some of your data using a public cloud provider located in the United States. [Tell Me More.](#)

When you use the dashboards and reports included with Sales Engagement, you can:

- Measure cadence, email template, and call script effectiveness.
- Understand sales rep engagement behavior and coach for success.
- Measure buyer engagements for each of your leads, contacts, accounts, and opportunities.
- Analyze prospect behavior to optimize your sales playbooks.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1,** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1,** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

## Sales Engagement Dashboards

Sales Engagement includes two dashboards that allow you to measure the productivity and effectiveness of your cadence activities and reps.

- The Sales Engagement Sample Dashboard is a dynamic dashboard powered by a set of standard reports and custom report types.
- The Sales Engagement Performance Dashboard provides advanced visualizations and is powered by CRM Analytics.

Sales Engagement Sample Reports	CRM Analytics Dashboard
Metrics	
<ul style="list-style-type: none"> <li>• Provides pre-aggregation of Sales Engagement metrics.</li> <li>• Easily filters and joins cadence and engagement data with standard objects, such as users, leads, contacts, accounts, and opportunity contact roles.</li> </ul>	<ul style="list-style-type: none"> <li>• Suited to business intelligence users.</li> <li>• Shows how well a rep is performing based on a specific time frame.</li> <li>• Allows for analysis based on cadence-specific performance.</li> <li>• Supports row level inspection, but requires full CRM Analytics or CRM Analytics for Sales Cloud HVS permission set.</li> </ul>
Timing	
<ul style="list-style-type: none"> <li>• Shows Engagement counts (sends and opens) in near real-time.</li> <li>• Updates Cadence tracker-based aggregations (manual completes and skips) once per day.</li> </ul>	<ul style="list-style-type: none"> <li>• Updates dashboards 3 times per day.</li> </ul>
Export	
<ul style="list-style-type: none"> <li>• Supports export to CSV.</li> </ul>	<ul style="list-style-type: none"> <li>• Supports export to CSV, but requires full CRM Analytics or CRM Analytics for Sales Cloud HVS permission set.</li> </ul>
View	
<ul style="list-style-type: none"> <li>• Retains filter selections until you change them.</li> <li>• Aggregates data for all Cadence, Email Template, and Call Script Engagement reports. (Other datasets are based on sharing privileges.)</li> </ul>	<ul style="list-style-type: none"> <li>• Provides 3 tabs for lead, engagement, and cadence performance with a graphic view that updates with your filters.</li> <li>• Exposes data based on role hierarchy. If you don't use role hierarchy, users see data only for records they own. You can grant the View All Data permission to expose all records without using role hierarchy.</li> </ul>

## Sales Engagement Reports

The standard reports included with Sales Engagement give you information about cadence activities. Use the information to measure outcomes, refine best practices, and improve actions. Report types let you customize reports for your specific business needs.

Sales Engagement reports provide each role on the sales team with insight into their performance with a variety of measures and KPIs.

Role	Question	Typical Measures/KPIs
Sales Rep	How am I doing?	<ul style="list-style-type: none"> <li>• Overdue Tasks</li> </ul>

Role	Question	Typical Measures/KPIs
		<ul style="list-style-type: none"> <li>Leads Converted</li> <li>Active Cadences</li> <li>Completed Cadences</li> <li>Emails Sent per Day</li> <li>Calls Made per Day</li> <li>Email Replies by Account &amp; Contact</li> <li>Calls with Meaningful Connect by Account &amp; Contact</li> </ul>
Sales Leader	How is my team doing?	<ul style="list-style-type: none"> <li>Number of Active Leads/Contacts in a Cadence by Rep</li> <li>Number of Active Leads NOT in a Cadence by Rep</li> <li>Successful Calls &amp; Emails by Rep</li> <li>Target Disposition by Cadence &amp; Rep</li> <li>Leads Converted by rep</li> <li>Leads Converted by Cadence</li> <li>Pipeline Generation</li> </ul>
Sales Ops	What's working?	<ul style="list-style-type: none"> <li>Overdue tasks</li> <li>Disposition by Cadence</li> <li>Most Engaged Cadences</li> <li>Most Engaged Cadence Steps</li> <li>Top Performing Call Scripts</li> <li>Most Replied/Engaged Email Templates</li> <li>Email Replies by Account</li> <li>Calls with Meaningful Connect by Account</li> <li>Pipeline Generation</li> </ul>

## Key Terms and Objects

Sales Engagement introduces several new terms and objects. Understanding these objects helps you make the most effective use of Sales Engagement reporting.

### Cadence

A structured sequence of actions that reps take to engage with targets.

### Cadence Step

Each step in a cadence has its own record that includes the step name, the step type, any templates used, step comments, and more.

**Cadence Tracker**

This tracks a target as it moves through a cadence. The tracker follows which step the target is on in the cadence and the outcome. The cadence tracker record is created when the target is added to a cadence.

**Cadence Step Tracker**

Cadence step trackers follow a target's progress through an specific cadence step. In reports, only the current step and last completed step are available. However, all cadence step tracker data can be queried for additional details.

**Engagement**

Engagement is the interaction between a rep and a lead, contact, or person account. Sales Engagement tracks interactions like call results and, when enabled, emails engagement statistics like opens, sends, and link clicks.

**Target**

A lead, contact, or person account that's been added to a cadence.

For more information about querying Sales Engagement objects, see the [Trailhead: Write SOQL Queries](#).

[Sales Engagement Sample Dashboard](#)

The Sales Engagement Sample Dashboard lets sales managers see up to 20 key metrics, such as email and call volume, engagement, and pipeline generation, all in one place. Managers can drill into each dashboard component for details.

[Standard Reports and Folders](#)

The standard reports included in Sales Engagement reports give you information about your cadence activities. As your reps work through cadences, you can evaluate how your prospects become qualified leads and which cadence step is most effective. You can also see phone call statistics for your reps, which reps are converting the most prospects, and more.

[Build Your Own Custom Reports for Sales Engagement](#)

If the standard reports don't meet your business needs, you can create additional custom report types to link cadence trackers with leads, contacts, accounts, and other objects. Cadence trackers represent the targets you add to cadences.

**Sales Engagement Sample Dashboard**

The Sales Engagement Sample Dashboard lets sales managers see up to 20 key metrics, such as email and call volume, engagement, and pipeline generation, all in one place. Managers can drill into each dashboard component for details.

The dashboard gives managers a sampling of the insights that Sales Engagement reports can provide.

The dashboard is a dynamic dashboard because it has the View As Dashboard User property, so it shows statistics based on records that the user has access to. Each Salesforce org has a dynamic dashboards limit. If you've reached the limit, the dashboard isn't installed. For information about checking how many dynamic dashboards you're using, see [Find the Dynamic Dashboards in my Organization](#).

If admins or managers want to edit the reports used by the dashboard, we recommend making copies of the reports and editing the copies. Any changes to the underlying reports can cause the dashboard to stop working. The reports and dashboard components can also change in future releases.

To show the components, including opportunity statistics, Relate Opportunities to Cadences must be turned on in Sales Engagement Setup at the time of the release.

**EDITIONS**

Available in: **Lightning Experience**

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

To view the dashboard in the Sales Engagement app, select **Dashboards** from the Navigation menu. Then select the **Sales Engagement Sample Dashboard**. You can also find the dashboard in the Sales Engagement Sample Dashboards folder. The dashboard reports are in the Sales Engagement Dashboard Reports folder.

## Performance at a Glance

These dashboard components help you understand how well your cadences are performing.

### Leads in Cadences

Shows how many leads are in cadences.

### Contacts in Cadences

Shows how many contacts are in cadences.

### Leads Converted from Cadences

Shows the number of leads in cadences that converted to contacts in the last 30 days.

### Pipeline Generated from Cadences

Shows the total amount of revenue from opportunities attributed to cadences in the last 30 days.

### Lead Conversions by Cadence

Shows which cadences generated the most lead conversions in the last 30 days.

### Target Disposition by Cadence

Shows the most common outcomes for each cadence in the last 30 days.

## Pipeline Generation

These components show you how much pipeline you're generating from Sales Engagement.

### Pipeline Generated by Sales Rep

Shows which sales reps are creating the most pipeline from their cadences.

### Pipeline Generated by Cadence

Shows which cadences create the most pipeline.

## Adoption and Performance by Sales Rep

These components show you how much your sales reps are using Sales Engagement, and how successful they are.

### Leads Converted by Sales Rep and Cadence

Shows which cadence is helping each sales rep achieve the most lead conversions.

### Successful Calls and Emails by Sales Rep

Shows how many successful call and email engagements each sales rep achieved in the last 30 days. You can easily change this component to show any call result or email engagement you want to track.

### Emails Sent Per Month

Shows how many emails each rep sent in recent months.

### Calls Made Per Month

Shows how many calls each rep made in recent months.

## Target Engagement

### This Month's Most Engaged Leads: Email

Shows which leads have been most engaged with email this month. Displays the total emails opened, link clicks, and replies for each lead in the last 30 days. You can change this component to display any email engagement that you want to track.

**This Month's Most Engaged Leads: Calls**

Shows which leads have been most engaged with calls this month. Displays the total calls with the call result Meaningful Connect for each lead in the last 30 days. You can change this component to display any call result that you want to track.

**Email Replies by Account and Contact**

Shows which accounts and contacts have been most engaged with email this month. Displays the total email replies that were received for each account and contact in the last 30 days. You can change this component to any email engagement that you want to track.

**Calls with Meaningful Connect by Account and Contact**

Shows which accounts and contacts have been most engaged with calls this month. Displays the total calls with the call result Meaningful Connect for each account and contact in the last 30 days. You can change this component to show any call result that you want to track.

**Asset Performance****Top Performing Call Scripts**

Shows that call scripts have generated the most all-time engagement. Displays the total calls with the call result Meaningful Connect for each call script. You can change this component to show any call result that you want to track.

**Most Replied to Email Templates**

Shows which email templates have generated the most all-time engagement. Displays the total email replies for each email template. You can change this component to show any email engagement that you want to track.

**Most Engaged Cadences**

Shows which cadences have generated the most all-time engagement. Displays the number of emails replied and calls with the call result Meaningful Connect for each cadence. You can change this component to show any email engagement or call result that you want to track.

**Most Engaged Cadence Steps**

Shows which cadence steps have generated the most all-time engagement. Displays the number of email replies and calls with the call result Meaningful Connect for each cadence step. You can change this component to show any email engagement or call result that you want to track.

**Standard Reports and Folders**

The standard reports included in Sales Engagement reports give you information about your cadence activities. As your reps work through cadences, you can evaluate how your prospects become qualified leads and which cadence step is most effective. You can also see phone call statistics for your reps, which reps are converting the most prospects, and more.

The standard reports are stored in two folders.

- The Sample Sales Reports folder, which contains a variety of reports that measure cadences, leads, and more.
- The Sample Sales Reports > Sales Engagement Dashboard Reports folder, which contains reports that detail the information displayed in the Sales Engagement Sample Dashboard.

[Cadence and Lead Outcome Reports for Sales Engagement](#)

This set of standard reports measures Sales Engagement outcomes and ROI.

[Asset Engagement Reports for Sales Engagement](#)

These standard reports help measure the effectiveness of cadences, cadence steps, call scripts, and email templates.

**EDITIONS**

Available in: **Lightning Experience**

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### [Rep-Focused Activity and Engagement Reports for Sales Engagement](#)

These standard reports measure activity and engagements for each of your reps.

### [Buyer-Focused Engagement Reports for Sales Engagement](#)

These standard reports measure engagements for each of your leads, and contacts. These reports don't include information about reps.

### [Combined Buyer and Rep Reports for Sales Engagement](#)

These standard reports measure cadence activity for each of your sales reps, leads, and contacts. These reports don't contain information on engagement.

## Cadence and Lead Outcome Reports for Sales Engagement

This set of standard reports measures Sales Engagement outcomes and ROI.

### Cadence Completion Reason

This report shows the percentage of cadence completions by completion reason for cadences that had contacts or leads added within the past 30 days.

Folder	Sample Sales Reports
Report Type	Cadences & Trackers
Insights	<ul style="list-style-type: none"> <li>Which cadence is the most effective for lead conversion or completion?</li> <li>Are reps adopting new cadences as planned?</li> </ul>
Key Data Points	<ul style="list-style-type: none"> <li>Cadences and their completion reason statistics</li> <li>Percentage rate for each completion reason</li> </ul>
Notes	<p>The completion reason field is empty until a target completes a cadence.</p> <p>If you increase the report's time span, and your company contains many leads or contacts in each cadence, the report can take longer to run. Use filtering to improve performance and limit the results returned by the report. For example, reduce the time span to cadences less than the default 30-day setting.</p> <p>To include the Cadence Disposition Reason, clone this report type and edit the layout to add the field. Then build a report based on the new report type.</p>

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

## Lead Conversions by Cadence

This report shows which leads have converted in the last 30 days for each cadence. It also includes leads not in sales cadences.

Folder	Sample Sales Reports > Sales Engagement Dashboard Reports
Report Type	Leads With or Without Cadence Trackers
Insights	<ul style="list-style-type: none"> <li>• Which reps have converted the most leads in the last 30 days with each sales cadence?</li> <li>• Which reps have converted the most leads in the last 30 days without a cadence?</li> </ul>
Key Data Points	<ul style="list-style-type: none"> <li>• Lead name, company, source, and key reportable lead fields</li> <li>• Converted account, contact, and opportunity names</li> <li>• Cadence completion reason, disposition, assignee, and all other reportable cadence tracker fields</li> </ul>
Notes	To include the additional converted account, contact, and opportunity amounts, clone this report type and edit the layout to add the fields. Then build a report based on the new report type.

## Lead Conversion Report

This report shows how many leads sales reps are converting, the dollar value of the related opportunities, and the top sales performers.

Folder	Sample Sales Reports
Report Type	Leads with Converted Lead Information
Insights	<ul style="list-style-type: none"> <li>• How many leads are my sales reps converting?</li> <li>• What's the dollar value?</li> <li>• Who's the top performer?</li> </ul>
Key Data Points	<ul style="list-style-type: none"> <li>• Lead conversion rates</li> <li>• Converted opportunity information, including dollar value</li> <li>• Sales rep performance</li> </ul>
Notes	This report shows org-wide lead conversion. For Sales Engagement specific reporting, begin with the Lead Conversions by Cadence report.

## Asset Engagement Reports for Sales Engagement

These standard reports help measure the effectiveness of cadences, cadence steps, call scripts, and email templates.

### Cadence Engagement

This report shows which cadence and which outreach step is the most effective for each type of prospect engagement, such as total calls or email delivery rate.

Folder	Sample Sales Reports
Report Type	Cadences & Steps
Insights	<ul style="list-style-type: none"> <li>Which cadence results in the best target engagement?</li> <li>Which specific steps result in the best target engagement?</li> </ul>
Key Data Points	<ul style="list-style-type: none"> <li>Cadence name, step name, and historical engagement details for emails and calls</li> </ul>

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### Cadence and Step Engagement by Month

This report shows which cadence and which outreach step is the most effective for each type of prospect engagement, such as total calls or email delivery rate over time, by month.

Folder	Sample Sales Reports > Sales Engagement Dashboard Reports
Report Type	Cadences & Steps with Monthly Metrics
Insights	<ul style="list-style-type: none"> <li>Which cadence results in the best target engagement organized by month?</li> <li>Which specific steps result in the best target engagement by month?</li> </ul>
Key Data Points	<ul style="list-style-type: none"> <li>Cadence name, step name, and monthly engagement details for emails and calls</li> </ul>

### Email Template Engagement

This report shows how prospects responded to emails based on your email templates.

Folder	Sample Sales Reports
Report Type	Email Template Engagement Report
Insights	<ul style="list-style-type: none"> <li>Which email template results in the best target engagement?</li> </ul>

Key Data Points	<ul style="list-style-type: none"> <li>• Total sent, delivered, total opened emails</li> <li>• Total hard and soft bounces with Bounce Management enabled</li> </ul>
Notes	<p>To include the out of office, replies, and links clicked, clone this report type and edit the layout to add the fields. Then build a report based on the new report type.</p> <p>Email Engagements come from customer interactions with emails sent through Lightning Experience (minus case emails) or through Gmail/Outlook when Inbox is enabled.</p>

### Email Template Engagement by Month

This report shows how prospects responded to emails based on your email templates over time, by month.

Folder	Sample Sales Reports > Sales Engagement Dashboard Reports
Report Type	Email Template Monthly Engagement
Insights	<ul style="list-style-type: none"> <li>• Which email template results in the best target engagement, by month?</li> </ul>
Key Data Points	<ul style="list-style-type: none"> <li>• Total sent, delivered, total opened emails</li> <li>• Total hard and soft bounces with Bounce Management enabled</li> <li>• Total out of office, replies, and links clicked</li> </ul>
Notes	<p>Email Engagements come from customer interactions with emails sent through Lightning Experience (minus case emails) or through Gmail/Outlook when Inbox is enabled.</p>

### Call Script Engagement

This report shows how prospects responded to calls based on your call scripts. See exactly how many calls were successful.

Folder	Sample Sales Reports
Report Type	Call Script Engagement Report
Insights	<ul style="list-style-type: none"> <li>• Which call scripts generate the most engagement?</li> </ul>
Key Data Points	<ul style="list-style-type: none"> <li>• Total number of calls per call script, historically</li> <li>• How many calls resulted in meaningful connects, not interested, unqualified, voicemails, call back later</li> </ul>

### Call Script Engagement by Month

This report shows how prospects responded to calls based on your call scripts over time, by month. See exactly how many calls were successful.

Folder	Sample Sales Reports > Sales Engagement Dashboard Reports
Report Type	Call Script Monthly Engagement
Insights	<ul style="list-style-type: none"> <li>Which call scripts generate the most engagement?</li> </ul>
Key Data Points	<ul style="list-style-type: none"> <li>Total number of calls per call script by month</li> <li>How many calls resulted in meaningful connects, not interested, unqualified, voicemails, call back later, over time</li> </ul>

### Rep-Focused Activity and Engagement Reports for Sales Engagement

These standard reports measure activity and engagements for each of your reps.

#### Call Activity

This report shows which reps are making the most phone calls, and the results of those calls.

Folder	Sample Sales Reports
Report Type	Tasks & Events
Insights	<ul style="list-style-type: none"> <li>How many calls are my reps making?</li> <li>Who's the top performer?</li> <li>What is the duration of the call?</li> </ul>
Key Data Points	<ul style="list-style-type: none"> <li>Rep call results</li> <li>Related account, opportunity, lead, or contact</li> </ul>
Notes	<p>These reports contain minimal information about cadence targets.</p> <p>Sales Dialer users can also benefit from the Voice Call Report.</p>

#### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

#### Leads Converted By Rep

This report shows which reps have converted the most leads in the last 30 days with each cadence.

Folder	Sample Sales Reports > Sales Engagement Dashboard Reports
Report Type	Leads and Cadence Trackers

Insights	<ul style="list-style-type: none"> <li>Which reps have converted the most leads in the last 30 days with each cadence?</li> </ul>
Key Data Points	<ul style="list-style-type: none"> <li>Lead name, company, source, and key reportable lead fields</li> <li>Converted account, contact, and opportunity name and amounts</li> <li>Cadence completion reason, disposition, assignee, and all other reportable cadence tracker fields</li> </ul>
Notes	To include the additional converted account, contact, and opportunity amounts, clone this report type and edit the layout to add the fields. Then build a report based on the new report type.

### Users with Engagements by Day

This report shows the engagement of your users for overall email and call activity per day.

Folder	Sample Sales Reports > Sales Engagement Dashboard Reports
Report Type	Users with Daily Metrics
Insights	<ul style="list-style-type: none"> <li>How engaged are my users on overall email and call activity per day?</li> </ul>
Key Data Points	<ul style="list-style-type: none"> <li>Users and daily engagement details for emails and calls</li> </ul>
Notes	<p>Cadence and cadence tracker data aren't in this report.</p> <p>Email Engagements come from customer interactions with emails sent through Lightning Experience (minus case emails) or through Gmail or Outlook when Inbox is enabled.</p>

### Engagement by Sales Rep and Month

This report shows the engagement of your users for overall email and call activity per month.

Folder	Sample Sales Reports > Sales Engagement Dashboard Reports
Report Type	Users with Monthly Engagements
Insights	<ul style="list-style-type: none"> <li>How engaged are my users on overall email and call activity per month?</li> </ul>
Key Data Points	<ul style="list-style-type: none"> <li>Users and monthly engagement details for emails and calls</li> </ul>
Notes	Cadence and cadence tracker data aren't in this report.

Email Engagements come from customer interactions with emails sent through Lightning Experience (minus case emails) or through Gmail or Outlook when Inbox is enabled.

## Buyer-Focused Engagement Reports for Sales Engagement

These standard reports measure engagements for each of your leads, and contacts. These reports don't include information about reps.

### Leads with Engagements by Day

This report shows the level of engagement from leads through email and call engagement activities per day.

Folder	Sample Sales Reports
Report Type	Leads with Daily Engagements
Insights	<ul style="list-style-type: none"> <li>How engaged are my leads on overall email and call engagement activity per day?</li> </ul>
Key Data Points	<ul style="list-style-type: none"> <li>Leads and daily engagement details for emails and calls</li> </ul>
Notes	<p>Cadence and cadence tracker data aren't in this report.</p> <p>Email Engagements are generated by emails that are sent through Lightning Experience (minus case emails) or sent through Gmail or Outlook when Inbox is enabled.</p>

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### Leads with Monthly Engagements

This report shows the level of engagement from leads through email and call engagement activities on a monthly basis.

Folder	Sample Sales Reports
Report Type	Leads with Monthly Metrics
Insights	<ul style="list-style-type: none"> <li>How engaged are my leads on overall email and call engagement activity per month?</li> </ul>
Key Data Points	<ul style="list-style-type: none"> <li>Leads and monthly engagement details for emails and calls</li> </ul>
Notes	Cadence and cadence tracker data aren't in this report.

	Email Engagements are generated by emails that are sent through Lightning Experience (minus case emails) or sent through Gmail or Outlook when Inbox is enabled.
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### Contacts with Daily Engagements

This report shows the level of engagement from contacts through email and call engagement activities on a daily basis.

Folder	Sample Sales Reports
Report Type	Contacts with Daily Engagements
Insights	<ul style="list-style-type: none"> <li>How engaged are my contacts on overall email and call activity per day?</li> </ul>
Key Data Points	<ul style="list-style-type: none"> <li>Contacts and daily engagement details for emails and calls</li> </ul>
Notes	<p>Cadence and cadence tracker data aren't in this report.</p> <p>Email Engagements are generated by emails that are sent through Lightning Experience (minus case emails) or sent through Gmail or Outlook when Inbox is enabled.</p>

### Contacts with Monthly Engagements

This report shows the level of engagement from contacts through email and call engagement activities on a monthly basis.

Folder	Sample Sales Reports
Report Type	Contacts with Monthly Engagements
Insights	<ul style="list-style-type: none"> <li>How engaged are my contacts on overall email and call engagement activity per month?</li> </ul>
Key Data Points	<ul style="list-style-type: none"> <li>Contacts and monthly engagement details for emails and calls</li> </ul>
Notes	<p>Cadence and cadence tracker data aren't in this report.</p> <p>Email Engagements are generated by emails that are sent through Lightning Experience (minus case emails) or sent through Gmail or Outlook when Inbox is enabled.</p>

### Contact Engagement by Account by Day

This report shows the level of engagement by accounts with contacts through email and call engagement activities per day.

Folder	Sample Sales Reports > Sales Engagement Dashboard Reports
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Report Type	Accounts with Contacts with Daily Engagements
Insights	<ul style="list-style-type: none"> <li>How engaged are my account contacts on overall email and call activity per day?</li> </ul>
Key Data Points	<ul style="list-style-type: none"> <li>Account contacts and daily engagement details for emails and calls</li> </ul>
Notes	<p>Cadence and cadence tracker data aren't in this report.</p> <p>Email Engagements are generated by emails that are sent through Lightning Experience (minus case emails) or sent through Gmail or Outlook when Inbox is enabled.</p>

## Combined Buyer and Rep Reports for Sales Engagement

These standard reports measure cadence activity for each of your sales reps, leads, and contacts. These reports don't contain information on engagement.

### Cadences and Completed Trackers

This report shows how many targets (lead, contact, person accounts) each rep has taken to completion in the last 30 days and the resulting dispositions.

Folder	Sample Sales Reports > Sales Engagement Dashboard Reports
Report Type	Cadences and Trackers (Inner join)
Insights	<ul style="list-style-type: none"> <li>How many targets is each sales rep taking to completion, and with what dispositions?</li> </ul>
Key Data Points	<ul style="list-style-type: none"> <li>Cadence assignee and target disposition</li> <li>Insights into all cadences and across all target objects (lead, contact, person accounts)</li> </ul>
Notes	<p>To include the last completed step and current step fields, clone this report type and edit the layout to add the fields. Then build a report based on the new report type. This new report provides more insights into the last completed step for cadences in a Complete state, and the current step for cadences in a Running state.</p> <p>You can also expose additional insights about the cadence assignee, such as manager.</p>

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

	Change the filter from State = Complete to State = Running to show all active cadences.
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### Leads with Cadence Trackers

This report combines leads with cadence trackers to let sales managers see which of their leads are in a cadence and how each completed it.

Folder	Sample Sales Reports > Sales Engagement Dashboard Reports
Report Type	Leads and Cadence Trackers
Insights	<ul style="list-style-type: none"> <li>• Which leads are in cadences?</li> </ul>
Key Data Points	<ul style="list-style-type: none"> <li>• Cadence name, assignee, and target disposition</li> <li>• Lead name, owner, source</li> <li>• Converted opportunity name</li> </ul>
Notes	<p>To include additional fields (e.g., related account, opportunity, or contact fields; user (assignee) manager), clone this report type and edit the layout to add the fields. Then build a report based on the new report type.</p> <p>You can expose additional fields for the the last completed step and current step fields, like Due Date.</p> <p>Change the filter from State = Running to State = Complete to show all completed cadences.</p>

### Contacts with Cadence Trackers

This report combines contacts with cadence trackers to let sales managers see which of their contacts are in a cadence and how each completed it.

Folder	Sample Sales Reports > Sales Engagement Dashboard Reports
Report Type	Contacts and Cadence Trackers
Insights	<ul style="list-style-type: none"> <li>• Which contacts are in cadences?</li> </ul>
Key Data Points	<ul style="list-style-type: none"> <li>• Cadence name, assignee, and target disposition</li> <li>• Contact name, title, account name</li> <li>• Opportunity attribution type and related opportunity name, amount and closed status</li> </ul>
Notes	To include additional fields (e.g., related account, opportunity, or contact fields; user (assignee) manager), clone this report type and

edit the layout to add the fields. Then build a report based on the new report type.

You can expose additional fields for the the last completed step and current step fields, like Due Date.

Change the filter from State = Running to State = Complete to show all completed cadences.

## Task Reports

The fields available in task object reports let you see the cadences, cadence states, cadence steps, and target dispositions related to each task. Create a task report to include these fields.

There are differences to consider when choosing between the Tasks and Events standard report type, an Activities with Object standard report type, or an Object with Activities custom report type.

- The Task and Events report type returns Activities across multiple objects (such as Cases, Accounts, Contacts, Leads, Campaigns, and Opportunities). As a result, these reports can be more susceptible to time outs because they typically query several objects.
- The Activities with Object and Object with Activities report types improve activity report performance by using separate report types that are more specific to a single object, like the Activities with Leads report type. Though this limits the Activities in the report to those related to the selected object, the performance on these reports is much faster since they query fewer objects.
- When creating reports using the Activities with Object report type, custom fields from the object aren't available. As an alternative, [Create a Custom Report Type](#) for the object and add Activities as the secondary object.

To see related sales cadences in task reports, use the Report Builder to add the Sales Cadence Name, State, Sales Cadence Step Title, and Target Disposition fields to task reports.

## Build Your Own Custom Reports for Sales Engagement

If the standard reports don't meet your business needs, you can create additional custom report types to link cadence trackers with leads, contacts, accounts, and other objects. Cadence trackers represent the targets you add to cadences.

Beyond standard reports, there are report types that can be cloned and leveraged to unlock additional fields. A report type defines the set of records and fields available to a report based on the relationships between a primary object and its related objects.

In addition to the standard reports included with Sales Engagement, there are included report types that can be cloned and edited to include additional fields. A report type defines the set of records and fields available to a report based on the relationships between a primary object and its related objects.

If an object you're interested in isn't included in the standard reports, you can create a report type to access that object's fields. Common use cases are:

- Accounts and Cadence Trackers
- Opportunity Contact Roles and Cadence Trackers
- Email Messages with Contacts and Email Messages with Leads (If you don't use Einstein Activity Capture)

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

## Custom Report Types Included with Sales Engagement

Several custom report types are included with Sales Engagement. Sample reports are available for each report type.

Custom Report Type	Description
Accounts with Contacts with Daily Engagements	Accounts, contacts, and their engagements per day.
Cadences & Steps	Sales cadences and the associated steps. Allows reporting on information such as the engagement of each sales cadence.
Cadences & Steps with Monthly Metrics	Sales cadences and the associated steps. Allows reporting on information such as the engagement of each sales cadence by month.
Cadences & Trackers	Sales cadences and associated trackers. Allows reporting on information such as the exit status for each target.
Cadences and Trackers (Inner join)	Sales cadences and associated trackers. Allows reporting on information such as the exit status for each target.
Call Script Engagement Report	Which call script results in the best target engagement?
Call Script Monthly Engagement	Call script engagements by month
Contacts and Cadence Trackers	Contacts and associated trackers
Contacts with Daily Engagements	Contacts and their engagements per day
Contacts with Monthly Engagements	Contacts and their engagements per month
Email Template Engagement Report	Which email template results in the best target engagement?
Email Template Monthly Engagement	Email template engagements by month
Leads and Cadence Trackers	Leads and associated trackers
Leads with Daily Engagements	Leads and their engagements per day
Leads with Monthly Engagements	Leads and their engagements per month
Leads With or Without Cadence Trackers	Leads that may or may not have sales cadence trackers
Users with Daily Metrics	Users and their engagements per day
Users with Monthly Engagements	Users and their engagements per month

## Custom Report Types Administrators Can Create for Sales Engagement

If the included report types don't meet your business needs, you can create additional custom report types in Setup. These are some examples.

Report Type	Purpose	Considerations
Accounts + Cadence Trackers	Combining accounts with cadence trackers lets sales managers see which of their person accounts are in a cadence and how each completed it.	Because you can add only person accounts to cadences, the report includes just those accounts.  To use this report type, Person Accounts must be enabled in Setup.
Opportunity Contact Roles + Cadence Trackers	Combining opportunity contact roles with cadence trackers lets sales managers see which of their opportunity contacts are in a cadence and how each completed it.	--

### Email Message Report Types

Your admin can create custom report types to display record level detail for individual email sends.

Record-level details include:

- Details of the email, such as to/from/cc and subject/body.
- First open and last open engagements, as well as linked replies.
- Contact or lead details can be included by joining those objects to the report.

Email message records aren't generated for Einstein Activity Capture-enabled users.

You can create these custom report types in Setup.

Report Type	Purpose
Email Message and Contacts	Managers and sellers can drill into email details to surface information like send and recipient info, send time, first/last open date stamps, subject, and body details.
Email Message and Leads	Managers and sellers can drill into email details to surface information like send and recipient info, send time, first/last open date stamps, subject, and body details.

#### [Glossary of Sales Engagement Reporting Terms and Objects](#)

Sales Engagement introduces several new terms and objects. Understanding these objects helps you make the most effective use of Sales Engagement reporting.

#### [Glossary of Sales Engagement Email Metrics Fields](#)

Sales Engagement reports contain many fields that show email activity and recipient engagement. You can also use these fields when building your own reports.

SEE ALSO:

[Build a Report in Lightning Experience](#)

## Glossary of Sales Engagement Reporting Terms and Objects

Sales Engagement introduces several new terms and objects. Understanding these objects helps you make the most effective use of Sales Engagement reporting.

### Cadence

A structured sequence of actions that reps take to engage with targets.

### Cadence Step

Each step in a cadence has its own record that defines specifics, such as the step name, the step type, any templates used, step comments, and more.

### Cadence Step Tracker

The cadence step tracker keeps track of the current step and completed steps of a target. For reporting purposes, only the current step and last completed step are available. However, all cadence step tracker data can be queried for additional details.

### Cadence Tracker

This is an object that tracks a target as it moves through a cadence. The tracker follows which step the target is on in the cadence and the outcome. The cadence tracker record is created when the target enters a cadence.

### Engagement

Engagement is the interaction between a rep and a lead, contact, or person account. Sales Engagement tracks interactions like call results and, when enabled, emails engagement statistics like opens, sends, and click rates.

### Target

A lead, contact, or person account that's been added to a cadence.

For more information about querying Sales Engagement objects, see the [Trailhead: Write SOQL Queries](#).

#### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

## Glossary of Sales Engagement Email Metrics Fields

Sales Engagement reports contain many fields that show email activity and recipient engagement. You can also use these fields when building your own reports.

Sales Engagement provides fields to track sent email, email delivery, and engagement.

### Sent Email Counts

#### All Emails Sent Count

The number of sent emails. This field increments each time you send an email. When you send a list email, the number of sent emails is the same as the number of recipients.

#### All Emails Tracked Sent Count

The number of trackable emails sent. This field increments each time you send a trackable email. When you send a list email, the number of sent emails is the number of recipients. This field tells you how many emails were sent and tracked.

#### All Emails Untracked Sent Count

The number of sent emails that weren't tracked. This field increments each time you send an email that isn't being tracked. When you send a list email, the number of sent emails is the same as the number of recipients.

#### Link Click Trackable Sends

The number of emails sent with link click tracking.

#### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

**Open Trackable Sends**

The number of emails sent with open tracking.

**Reply Trackable Sends**

The number of emails sent with reply tracking.

**Soft Bounce Trackable Sends**

The number of emails sent with soft bounce tracking.

**Hard Bounce Trackable Sends**

The number of emails sent with hard bounce tracking.

**Out of Office Trackable Sends**

The number of emails sent with out-of-office tracking.

**Recipient Sends**

The number of unique email recipients.

**Link Click Trackable Recipient Sends**

The number of recipients who received an email with link tracking.

**Open Trackable Recipient Sends**

The number of recipients who received an email with open tracking.

**Reply Trackable Recipient Sends**

The number of recipients who received an email with reply tracking.

**Soft Bounce Trackable Recipient Sends**

The number of recipients who received an email with soft bounce tracking.

**Hard Bounce Trackable Recipient Sends**

The number of recipients who received an email with hard bounce tracking.

**Out of Office Trackable Recipient Sends**

The number of recipients who received an email with out-of-office tracking. Out-of-office tracking requires Inbox.

## Email Delivery Counts

**All Emails Delivered Count**

The sum of all delivered emails. This field increments each time an email is delivered to a recipient.

**Some Emails Delivered Count**

The number of sent emails that were successfully delivered to at least one of its recipients.

**All Emails Not Delivered Count**

The number of sent emails that were bounced for all recipients on the email. Bounced emails aren't marked as delivered.

**All Emails Bounced Count**

The number of emails that either hard or soft bounced.

**All Emails Hard Bounced Count**

The number of sent emails that hard bounced. Hard bounces can mean that the recipient's email address doesn't exist or is misspelled.

**All Emails Soft Bounced Count**

The number of sent emails that soft bounced. A soft email bounce often indicates a temporary issue with the recipient's email server, such as a full inbox.

**Delivered Recipient Count**

The number of recipients that were successfully delivered an email.

**Recipients Soft Bounced**

The number of recipients that soft-bounced an email. A soft bounce often indicates a temporary issue with the recipient's email server, such as a full inbox.

**Recipients Hard Bounced**

The number of recipients that hard-bounced an email. Hard bounces can mean that the recipient's email address doesn't exist or is misspelled.

## Email Engagement Counts

**All Emails Opened Count**

The number of opened emails.

**All Emails Replied Count**

The sum of replies for all emails. This field increments each time you receive a reply to an email. This field tells you how many total replies you received.

**All Emails Link Clicked Count**

The number of emails that have at least one link click.

**All Emails Out of Office Count**

The number of emails that received an out-of-office reply.

**Unique Emails Opened Count**

The number of times an email you sent was opened by a unique recipient. When you send a list email, this field increments each time a recipient opens the received email.

**Unique Emails Replied Count**

The number of replies from unique recipients.

**Unique Emails Link Clicked Count**

The number of link clicks by unique recipients.

**Recipient Replies**

The number of unique recipients who replied to an email.

**Recipients Out of Office**

The number of recipients that responded with an out-of-office reply.

## Delivery and Engagement Rates

**All Emails Delivered Rate**

The percentage of tracked emails sent that were successfully delivered to all recipients.

**Some Emails Delivered Rate**

The percentage of sent and tracked emails that were successfully delivered to at least one of their recipients.

**Trackable Send Reply Rate**

The percentage of emails sent with reply tracking that received replies.

**Trackable Recipient Send Reply Rate**

The percentage of emails sent with reply tracking that received replies from unique recipients.

**Trackable Recipient Send Out of Office Rate**

The percentage of emails sent with out-of-office tracking that received out-of-office replies from unique recipients.

**Trackable Send Open Rate**

The percentage of emails sent with open tracking that were opened by the recipient.

**Trackable Send Link Click Rate**

The percentage of emails sent with link tracking that had link clicks.

**Trackable Recipient Send Soft Bounce Rate**

The percentage of emails sent to unique recipients with soft bounce tracking that soft-bounced.

**Trackable Recipient Send Hard Bounce Rate**

The percentage of emails sent to unique recipients with hard bounce tracking that hard bounced.

**Delivered Recipient Rate**

The percentage of unique recipients that received an email you sent.

**Trackable Send Out Of Office Rate**

The percentage of emails sent with out-of-office tracking that received out-of-office replies.

**Trackable Send Soft Bounce Rate**

The percentage of emails sent with soft bounce tracking that soft bounced.

**Trackable Send Hard Bounce Rate**

The percentage of emails sent with hard bounce tracking that hard bounced.

## CRM Analytics and Sales Engagement

CRM Analytics, formerly known as Tableau CRM, is a cloud-based platform for connecting data from multiple sources, creating interactive views of that data, and sharing those views in apps. Sales managers can use performance dashboards in CRM Analytics to quickly see customer engagement and how sales reps are doing. For example, managers can view how many cadences are in progress, with detailed call and email response statistics. And they can see how effectively sales reps work through their cadences.

 **Note:** Sales Engagement stores some of your data using a public cloud provider located in the United States. [Tell Me More](#).

The Sales Engagement performance dashboards in CRM Analytics show advanced visualization compared to the standard Sales Engagement Sample Dashboard. You can change filters on the fly, giving you greater control over the scope of data shown on the dashboard. As each filter changes, these dashboards produce a tabular view of the data and a graphic view.

Salesforce admins enable the dashboards by mapping your Call Result values and turning on the Sales Engagement Performance Analytics Application in Sales Engagement Setup.

To view the dashboards, choose Sales Engagement Performance from the navigation menu in the Sales Engagement app.

 **Important:** We don't recommend editing the dashboards because changes can be overwritten during each Salesforce major release. We also don't recommend cloning the dashboards because clones don't have access to the dashboard's required data connections.

In some specific circumstances, a scheduled update to the Sales Engagement Performance Analytics application may not complete. If you see an update installation message that persists for several hours, ask your Salesforce admin to turn the Sales Engagement Performance Analytics Application setting off and then on again in Sales Engagement Setup.

Keep these considerations in mind when working with the Sales Engagement Performance Dashboards in CRM Analytics.

- Contact and Account Dashboards - It's important to note there is no performance dashboard for contacts or person accounts; however, there are standard reports available.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

- Timing - The Sales Engagement Performance Dashboard refreshes up to three times per day. Your Salesforce admin determines the refresh schedule.

## Role Hierarchy

The lead, cadence, and engagement data that users see in the dashboards depends on whether you use role hierarchy. If you use role hierarchy, users see data only for leads, cadences, and engagements that they or users below them in the role hierarchy they own. If you don't use role hierarchy, users see data only for records they own.

To let a user see all the records you have in Salesforce, add the View All Data permission to their user profile. Assigning the View All Data permission through a permission set doesn't allow a user to see all data in the analytics dashboard.

## Permissions and Access

CRM Analytics offers two types of access to the performance dashboards based on user permissions.

- All users have a standard user license, which allows them to view all tabs on the performance dashboards and use pre-defined filters to analyze the data.
- Three of the licenses provided with CRM Analytics allow for specified individuals to have additional access to the dashboards and greater analytics capabilities.
- If a user is already designated as a report admin and currently has access to CRM Analytics, that person has the enhanced access to the Sales Engagement Performance Dashboards.

The differences in user access are defined in this table.

<b>Standard Sales Engagement User</b>	<b>Report Admin with Full CRM Analytics -OR- CRM Analytics for Sales Engagement</b>
Permission Set Assignments	
<ul style="list-style-type: none"> <li>• Access with Sales Engagement User, Sales Engagement User Included, Sales Engagement Cadence Creator, Sales Engagement Cadence Creator Included permission sets.</li> </ul>	<ul style="list-style-type: none"> <li>• Access given through full CRM Analytics or "CRM Analytics for Sales Cloud HVS" permission set.</li> <li>• Three permission sets included on the org level for access to Analytics Studio.</li> <li>• Additional purchase required to give to all users.</li> <li>• Data Manager requires additional licensing.</li> </ul>
Features	
<ul style="list-style-type: none"> <li>• Embedded dashboards are available to all Sales Engagement users and accessible via the App Navigation Item.</li> <li>• View Lead Performance, Engagement Performance, and Cadence Performance dashboards.</li> <li>• Leverage predefined filters to slice and segment data.</li> </ul>	<ul style="list-style-type: none"> <li>• View Lead Performance, Engagement Performance, and Cadence Performance dashboards, and underlying data sets.</li> <li>• Save views as filters.</li> <li>• Build lenses for advanced filtering and sorting on the data level.</li> <li>• Clone and share custom apps, dashboards, and lenses.</li> <li>• Export data.</li> <li>• Some capability to edit data flow. (Requires a full CRM Analytics permission set that isn't included with Sales Engagement.)</li> </ul>

### [CRM Analytics Sales Engagement Performance Dashboards](#)

There are three out-of-the-box Sales Engagement Performance Dashboards powered by CRM Analytics.

SEE ALSO:

[Define Call Result Values for Cadence Branching](#)

## CRM Analytics Sales Engagement Performance Dashboards

There are three out-of-the-box Sales Engagement Performance Dashboards powered by CRM Analytics.

### Lead Performance Dashboard

The Lead Performance dashboard shows details of how your team is working their leads, both within and outside of Sales Engagement. The dashboard includes all leads, not just leads that have been assigned to cadences.

Key Data Points

- How many leads were touched
- The number of conversions
- The average number of touches per lead
- Average touches per lead
- Average minutes to first outreach
- Average days to convert

Sales teams can filter lead statistics by sales rep, date range, and cadence.

### Engagement Performance Dashboard

With the Engagement Performance dashboard, view prospect engagement statistics for emails (sent, opened, delivered) and phone calls, sorted by cadence, date range, sales rep, or a combination. Email clicks and reply engagements can also be configured to appear here.

Key Data Points

- Email engagement totals
- Phone call disposition totals
- Filter by users and their step level engagements (Only available in the Sales Engagement Performance Dashboard.)

Sales teams can filter engagement statistics by sales rep, date range, cadence, and step type.

In standard platform reports, you can only see steps and their engagements separately from users and their engagements.

### Cadence Performance Dashboard

View cadence effectiveness with the Cadence Performance dashboard. Details include statistics on targets-in-progress, lead conversion, and cadence completions.

Key Data Points

- Targets in Progress
- Leads Converted

#### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1,** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

- Completed Last Step
- Manually Removed
- Automatically Exited
- Completed On Time
- Completed Overdue
- Skipped
- Targets Currently Paused

Sales teams can filter engagement statistics by sales rep, date range, sales, and cadence.

## Adding Automation to Sales Engagement

Save time and improve consistency by adding automation to your Sales Engagement activities. Choose from a range of automation tools and templates that fit a variety of automation use cases, such as automated actions, cadence screen flows, and cadence autolaunched flows. You can also use platform automation tools such as Flow Builder, Apex, and APIs to automate how cadences work with leads, contacts, and person accounts.

### [Bulk Record Actions and Cadences](#)

In addition to using the automation tools available in Sales Engagement to help streamline cadence activity, reps can use list views and reports to apply cadence-related actions to large groups of records.

### [Cadence Automation Tools](#)

The automation tools and templates included in Sales Engagement provide effective ways to streamline your cadences. Learn more about your cadence automation options.

### [Choosing the Right Automation Option](#)

When you want to incorporate automation into your Sales Engagement cadences or handle large groups of records at one time with bulk actions, it's important to clarify your use case. Pinpointing the resulting trigger origin can help you select the most effective option for your needs.

### [Create an Automated Action](#)

Save time by automating common cadence target-related tasks with processes that manage cadence targets and associated records you own. With simple if-this-then-that logic, you can automatically add, remove, pause, or resume cadence targets and change target assignees based on criteria you choose. If you're a manager, you can create automated actions for your subordinates.

### [Add Screen Flows to Cadences with Cadence Step Flows](#)

In Cadence Builder, you can specify a screen flow as a cadence step. Use screen flow steps to let reps create a case, event, or task or to perform another action. The screen flow runs when the rep initiates the step for a target from their Work Queue or the Sales Engagement component on target records. Salesforce admins or developers can get started by cloning and customizing the Cadence Step Flow templates included in Sales Engagement.

### [Run Flows After Cadence Steps with Cadence Autolaunched Flows](#)

When you build a cadence, you can run a flow as part of an action step such as a call or email. Perform key actions, such as updating the lead path or opportunity stage, when reps complete the step for a target. Managers can add flows to cadence steps in the Cadence Builder. Salesforce admins or developers can use the new Cadence Autolaunched Flow process type to create flows triggered after cadence steps, or use the included flow templates to get started.

### [Using Platform Automation Tools with Sales Engagement](#)

Add automation to Sales Engagement faster with flows designed specifically to perform common tasks. You can also use platform tools to automate your cadences when your use case doesn't fit the options included with Sales Engagement. Flow Builder, Apex, and APIs give you maximum flexibility to meet your specific business process needs.

#### SEE ALSO:

[Test Change Event Triggers](#)

## Bulk Record Actions and Cadences

In addition to using the automation tools available in Sales Engagement to help streamline cadence activity, reps can use list views and reports to apply cadence-related actions to large groups of records.

### List Views

Manually select groups of records from the Lead, Contact, Person, or Account list views and apply these Sales Engagement actions.

- Add to Cadence
- Change Target Assignee
- Remove from Cadence
- Pause Cadence Tracker
- Resume Cadence Tracker
- Add to My List

### Reports

Configure reports to modify groups of records from the Lead, Contact, Person, or Account objects and apply these Sales Engagement actions.

- Add to Cadence
- Remove from Cadence

Reports must start with a Lead, Contact, or Account object and can't be grouped or matrixed reports.

For list views and reports, cadence actions apply to a maximum of 200 records at a time.

#### SEE ALSO:

[Find Your Way Around List Views in Lightning Experience](#)

[Analyze Sales Engagement Performance with Reports and Dashboards](#)

#### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

## Cadence Automation Tools

The automation tools and templates included in Sales Engagement provide effective ways to streamline your cadences. Learn more about your cadence automation options.

### Automated Actions

Automated actions let users save time by giving them the ability to specify an action to perform, set conditions that trigger the action, and kick off automation on records they own. Automated actions are a quick and easy way for users to make their jobs easier and more efficient with targeted automations without the need for a Salesforce admin. Managers can also create automated actions for their subordinates. Each automated action can be set to perform its action automatically or to notify the record owner to choose whether to perform the action.

A user can create up to 50 automated actions. These actions trigger when a record is created and, optionally, every time a field is updated to meet certain conditions.

Sales Engagement includes five preconfigured automated actions that reps can use.

- Assign target to cadence
- Remove target from all cadences
- Pause target in all cadences
- Resume target in all cadences
- Change all cadence target assignees

For more information about building automated actions, see [Create an Automated Action](#).

Keep these considerations in mind when using automated actions.

- Automated actions can't update fields.
- Automated actions only trigger Sales Engagement actions and don't support other types of platform development capabilities.

 **Example:** Here are some automated actions a rep can create for cadence activities.

- When a lead is created, add the lead to a cadence. For example, a Follow Up on Interested Prospects cadence.
- When a contact has opted out of email, remove the lead from the cadence.
- When a lead is marked as unqualified, remove the lead from the cadence.
- When a contact replies to an email, change the cadence assignee.
- When an opportunity is lost, add the primary contact to a cadence, such as a Recover a Lost Opportunity cadence.
- When a case is closed, add the primary contact to a cadence.

### Cadence Step Flows

Screen flows are a powerful type of flow that provides the ability to present one or more screens to the rep, allowing for user interaction and input to complete a task. Cadence step flows are a type of screen flow designed for use as cadence steps in Sales Engagement.

Cadence step flows launch as a step in the cadence, right from the Work Queue or To Do List. Reps interact with screen flow cadence steps just like any action step type. The custom screen flow appears, allowing them to provide any needed input. Admins create cadence step flows and then activate those flows for cadence builders to include as cadence steps. See [Flow Types](#).

Sales Engagement includes three sample screen flow templates that you can clone and customize for your cadences.

- Create a Case
- Create a Task

#### EDITIONS

Available in: Lightning Experience

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- Create an Event

To use cadence step flows to manage cadences, such as adding or removing targets or changing target assignees, use the [built-in actions](#) included with Sales Engagement when building your flows.

 **Example:** Here are a few ways in which you can use screen flows in your cadence steps.

- Create a case.
- Create a task.
- Create an event.
- Send a text message through Digital Engagement.

## Cadence Autolaunched Flows

Cadence autolaunched flows are a type of autolaunched flow designed for use with Sales Engagement. Autolaunched flows can be configured to launch with no trigger, a schedule trigger, or a record trigger. Cadence autolaunched flows trigger when a target completes an action step in a cadence, such as an email, custom step, call, LinkedIn, or screen flow step.

Admins create cadence autolaunched flows that cadence builders can then add to individual cadence steps. You can create these flows from the included cadence autolaunched flow templates or create custom flows from scratch. For more information, see [Flow Types](#).

 **Note:** To trigger a flow at the start of a cadence or cadence step, or to apply a flow across multiple cadences, see the information on Change Data Capture solutions later in this article.

Sales Engagement includes three sample cadence autolaunched flow templates that you can clone and customize.

- Update Lead Path
- Update Opportunity Stage
- Update Contact Owner

To use cadence autolaunched flows to manage cadences, such as adding or removing targets or changing target assignees, use the [built-in actions](#) included with Sales Engagement when building your flows.

 **Example:** Here are some options for triggering an autolaunched flow at the end of a cadence step.

- When a call step is completed, update the lead path to contacted.
- When an email step is completed, update the opportunity stage to qualification.
- When a custom step is completed, update the contact or account owner to the cadence assignee.
- When a LinkedIn step is completed, change the cadence assignee to the rep who will continue the outreach.
- When a screen flow step is completed, change the cadence assignee to the rep who will continue the outreach.

## Custom Automation with Platform Tools

Salesforce provides additional platform tools to give you the ability to customize your Sales Engagement automations.

Before you decide to use platform tools for custom development, review the information about Automated Actions to confirm whether those options can be applied to your use case.

### Flow Builder

Use Flow Builder to add process automation and build individual flows using code-like logic without using a programming language.

One way to create flows in Flow Builder is to use standard autolaunched flows. Most features in Salesforce use the standard autolaunched flow type, including Sales Engagement. This flow type also can execute automatically to perform common tasks. Standard autolaunched flows can run based on schedule triggers, record triggers, or other background processes.

Sales Engagement includes three sample Standard Autolaunched Flow templates that you can clone and customize.

- Add Lead to Cadence
- Remove Lead from Cadence on Opt-Out
- Remove Unqualified Lead

For more information, see [Flow Types](#).

To use Flow Builder to manage cadences, such as adding or removing targets or changing target assignees, use the [built-in actions](#) included with Sales Engagement when building your flows.

### Apex and APIs

If the flow templates included with Sales Engagement don't meet your specific business process requirements, use the flow tools directly to create the custom flow automations you need.

If the flow templates included with Sales Engagement don't meet your specific business process requirements, use the flow tools directly to create the custom flow automations you need.

You can also use these tools independently from building cadences, to maximize the flexibility and customization of your flows and automate exactly what you need. In Sales Engagement, these tools can interact with cadences but aren't necessarily tied to a cadence. Cadence step flows and cadence autolaunched flows are tied to cadences.

- Use Apex if you're a developer who can use this object-oriented programming language to execute complex flow and transaction control statements on the Lightning Platform in conjunction with calls to the Lightning Platform API. Add business logic to most system events, including button clicks, related record updates, and Visualforce pages. Initiate Apex code by Web service requests and from triggers on objects.
- Use Salesforce APIs when you want other applications (or code in other applications) to programmatically access data in a simple and secure manner. For more information, see [Cadence Object Reference](#).

 **Note:** You can only use code to write Lightning components.

To use Apex and APIs to manage cadences, such as adding or removing targets or changing target assignees, use the [built-in actions](#) included with Sales Engagement when building your flows.

 **Example:** Here are some options for triggering standard autolaunched flows to perform cadence actions.

- When a lead is created, add the lead to a cadence. For example, a Follow Up on Interested Prospects cadence.
- When a contact has opted out of email, remove the lead from one or more cadences.
- When a lead is marked as unqualified, remove the lead from one or more cadences.
- When an opportunity is lost, add the primary contact to a cadence, such as a Recover a Lost Opportunity cadence.
- When a case is closed, add the primary contact to a cadence.
- When a contact is added to a product-specific campaign, assign the contact to a product-specific cadence.
- When a contact is assigned as an opportunity contact role, add the contact to an opportunity maturation cadence with the opportunity attributed to the cadence target.

Here's a method of using a custom standard screen flow with cadences.

- Build a standard screen flow and add it to the layout of an account page.
- On the first screen, list only contacts that have the title of Decision Maker. Allow the user to select those contacts to add to one or more cadences.
- On the second screen, list the relevant cadences, allow the user to select one or more cadences, and add a button that the user can click to add to cadence.

For more complex cadence routing logic, consider creating a custom object that contains fields representing business logic and a corresponding cadence, as in this example.

- Object Name = Cadence Routing Rules
- Example Rule Field Values: Lead Source = Website, Cadence = Website Welcome Cadence
- Build a trigger or record-triggered flow that executes on lead insert, reads the values from the Cadence Routing Rules object, and compares them to the values on the inserted lead.
- When a match is found and the lead isn't assigned to the maximum number of cadences, add to the specified cadence.

## Change Data Capture

Using Change Data Capture with Sales Engagement lets you trigger automation on changes to records. For example, you can trigger when a cadence target progresses to the next step in a cadence, which updates its associated action cadence tracker record. Change events can include but aren't limited to a target being added to a cadence, completing a cadence, beginning a step, or completing a step.

To implement automation for only one or a few cadences, or you don't want to develop a custom solution, consider using cadence autolaunched flows instead. Consider using Change Data Capture only if a cadence autolaunched flows solution can't satisfy your business requirements. Development effort is required to implement a Change Data Capture solution.

These use cases require a Change Data Capture solution.

- Triggering at the start or end of a cadence
- Triggering at the start of a step rather than the completion of a step, which is supported by cadence autolaunched flows
- Implementing a global automation solution across multiple cadences

While you can accomplish after-step triggering by individually configuring each step, if your requirement applies to multiple cadences, consider a global solution rather than ensuring each step is properly configured. For more information, see [Salesforce Developers: Change Data Capture Developer Guide](#) and [Sales Engagement Developer Guide](#).

To use change data capture to manage cadences, such as adding or removing targets or changing target assignees, use the [built-in actions](#) included with Sales Engagement when building your flows.

 **Example:** These cadence solutions are created with Change Data Capture.

- When a lead is assigned to a cadence (cadence starts), update a field on the lead.
- When a contact moves down the yes path on a listener step in a cadence (step starts), update a field on the contact.

These Change Data Capture solutions affect multiple cadences.

- When every cadence starts, update a field on the corresponding target.
- When every cadence ends, update a field on the corresponding target.\*
- After every intro call step is completed, update the lead status to working.\*

\* You can use cadence autolaunched flows if you want a cadence-specific solution instead of affecting all cadences.

## Choosing the Right Automation Option

When you want to incorporate automation into your Sales Engagement cadences or handle large groups of records at one time with bulk actions, it's important to clarify your use case. Pinpointing the resulting trigger origin can help you select the most effective option for your needs.

Automation Tool	Trigger Origin	Supported Actions	Who Creates Them?	Notes
Automated actions	<p>A record is created.</p> <p>A record is created *and* every time a field in the conditions is edited.</p> <p>Only applies to these objects:</p> <ul style="list-style-type: none"> <li>Lead</li> <li>Contact</li> <li>Person Account</li> <li>Case Primary Contact</li> <li>Email Engagements</li> <li>Call Engagements</li> <li>Opportunity Primary Contact</li> </ul>	<ul style="list-style-type: none"> <li>Assign target to cadence</li> <li>Change cadence target assignee</li> <li>Remove target from cadence</li> <li>Pause cadence tracker</li> <li>Resume cadence tracker</li> </ul> <p>Field updates aren't supported.</p>	Rep Actions apply only to records they own.	<p>Cadence assignee can be the rep or another user.</p> <p>Trigger conditions support:</p> <ul style="list-style-type: none"> <li>Up to 5 fields on the triggering object.</li> <li>An additional 5 fields on cross objects.</li> </ul>
Cadence step flows	A target starts a cadence step.	<p>Screen flow-supported actions that include (but aren't limited to):</p> <ul style="list-style-type: none"> <li>Sales Engagement API calls</li> <li>Field updates</li> </ul>	Salesforce admins Developers	Cadence builders can use active cadence step flows when creating cadences.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Automation Tool	Trigger Origin	Supported Actions	Who Creates Them?	Notes
Cadence autolaunched flows	The associated step completes.	Flow-supported actions that include (but aren't limited to): <ul style="list-style-type: none"> <li>• Sales Engagement API calls</li> <li>• Field updates</li> </ul>	Admins Developers	<p>Cadence builders can add an active cadence autolaunched flow to any action step.</p> <p>Add a flow to the completion of each cadence step, one step at a time.</p> <p>Add a flow to the last step at the completion of a cadence, one cadence at a time.</p>
Platform standard tools (Flow Builder, Apex, APIs, Batch Class)	<p>Inserts or updates to standard or custom objects, or any other platform triggering event.</p> <p>Excludes cadences, cadence steps, and engagements.</p>	<p>Platform-supported actions that include (but aren't limited to):</p> <ul style="list-style-type: none"> <li>• Sales Engagement API calls</li> <li>• Field updates</li> </ul>	Admins Developers	Optional: Define the solution at the org level.
Change Data Capture	<p>The start or end of a cadence.</p> <p>The start of a cadence step.</p> <p>A global automation solution across multiple cadences.</p>	<p>Platform-supported actions that include (but aren't limited to):</p> <ul style="list-style-type: none"> <li>• Sales Engagement API calls</li> <li>• Field updates</li> </ul>	Admins Developers	<p>Optional: Define the solution at the org level.</p> <p>Create a one-time triggering solution that ties into flows by using platform events.</p> <p>Use when your requirement affects multiple cadences rather than configuring an autolaunched flow for every cadence step.</p>

## Create an Automated Action

Save time by automating common cadence target-related tasks with processes that manage cadence targets and associated records you own. With simple if-this-then-that logic, you can automatically add, remove, pause, or resume cadence targets and change target assignees based on criteria you choose. If you're a manager, you can create automated actions for your subordinates.

You can trigger your automated actions from changes to records you or your subordinates own. When your automated actions run, they perform their actions on behalf of you or your subordinate, as if they had performed the action manually. For example, if your automated action adds an inbound lead to a cadence, Salesforce shows that the lead was added by you.

Before you begin using any of the included automated actions or ones you create, you must activate them. You can create up to 50 automated actions.

1. In the Automated Actions tab of the Sales Engagement app, click **New**.
2. Under Actions, select the action you want to automate.  
For example, automatically assign a target to a cadence.
3. Fill in the details of the action you want to automate.  
For example, select which cadence you want to add targets to.

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### USER PERMISSIONS

To create automated actions:

- Sales Engagement User
- OR
- Sales Engagement User Included
- OR
- Sales Engagement Cadence Creator
- OR
- Sales Engagement Cadence Creator Included
- AND
- Automated Action User

4. Choose whether to perform the action automatically, or remind the record owner to choose whether to run the action. Reminders appear in the Automated Action Reminders component on a record detail page when the record meets the conditions for the action. The record owner can choose to run the action, ignore it, or snooze it.
5. Select the object you want to trigger your automated action.
6. Select how often you want the automated action to check whether to perform your action based on the conditions you select in the next step.
7. Select the field values that trigger your automated action. For example, to add all new leads generated from your website to a cadence, select the Lead Source field and enter a value of *web*.
8. Select when to take action.
  - All conditions are met (AND)—This option triggers your action only when every one of the field values you specify are present.
  - Any conditions are met (OR)—This option triggers your action when any one or more of the field values you specify are present.
  - Custom logic (AND + OR + NOT)—This option lets you trigger your action when a combination of the field values you specify are present or not present.
9. To use fields on objects related to your primary object, click **Show Advanced Conditions**. These fields are sometimes called cross-object fields. For example, for leads, you can select the Converted Contact ID field and then the Email Opt Out field.
10. Select when to take action for cross-object fields.
11. Enter a name and description for your automated action.
12. Choose who the automated action is assigned to.
  - When you assign the action to yourself, it acts only on records you own.
  - When you assign the action to subordinates, it acts on records they own.
13. Choose who can activate the action.
  - Creator—Only you the author can activate or deactivate the action.

- Assignees (Default On)—The action is active for assignees, but they can choose to deactivate it.
- Assignees (Default Off)—The action is inactive for assignees, but they can choose to activate it.

14. When you're finished, click **Save** or **Save & Activate**. Your automated actions must be activated in order to execute. You can activate and deactivate an automated action at any time in the Automated Actions tab in the Sales Engagement app.

You can create automated actions from other locations in the Sales Engagement app.

- When you manually add a target to a cadence, you can automate adding records to that cadence by selecting **Add an Automated Action?**.
- When you create a quick cadence, you can automate adding records to the quick cadence by selecting **Add an Automated Action?**.

## Add Screen Flows to Cadences with Cadence Step Flows

In Cadence Builder, you can specify a screen flow as a cadence step. Use screen flow steps to let reps create a case, event, or task or to perform another action. The screen flow runs when the rep initiates the step for a target from their Work Queue or the Sales Engagement component on target records. Salesforce admins or developers can get started by cloning and customizing the Cadence Step Flow templates included in Sales Engagement.

To create your own screen flows for cadence steps, use the Cadence Step Flow process type, or use one of the included flow templates based on that type.

With Sales Engagement, three cadence screen flow templates are included in Flow Builder.

- Create a Case
- Create a Task
- Create an Event

 **Important:** Activate the flow templates before you clone them.

1. In Flow Builder, click **Cadence Step Flow**.
2. Choose the cadence step flow template you want to work with.
3. Clone the template and customize its elements to fit your business.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To create cadences:

- High Velocity Sales Cadence Creator (Enterprise Edition)

OR

High Velocity Sales Cadence Creator Included (Performance and Unlimited Editions)

To create and edit flows:

- Manage Flow

## Run Flows After Cadence Steps with Cadence Autolaunched Flows

When you build a cadence, you can run a flow as part of an action step such as a call or email. Perform key actions, such as updating the lead path or opportunity stage, when reps complete the step for a target. Managers can add flows to cadence steps in the Cadence Builder. Salesforce admins or developers can use the new Cadence Autolaunched Flow process type to create flows triggered after cadence steps, or use the included flow templates to get started.

To create your own screen flows for cadence steps, use the Cadence Autolaunched Flow process type, or use one of the included flow templates based on that type.

 **Note:** Cadence autolaunched flows can't call Apex actions.

1. In Flow Builder, click **New Flow**.
2. Click **Cadence Autolaunched Flow**.
3. Choose the cadence autolaunched flow template you want to work with.
4. Clone the template and customize its elements to fit your business.

With Sales Engagement, three cadence autolaunched flow templates are included in Flow Builder. Flow templates must be activated before being cloned.

- **Update Contact Owner:** Update the contact and account owner to the current cadence target assignee. This flow sets the owner of the associated contact and account records to the owner of the action cadence tracker record that is passed into the flow.
- **Update Lead Path:** Updates the lead's Status to Contacted. The Status field on leads is a dynamic picklist, so your company can use its own Status values. The flow template sets the Status to Contacted. If your Status picklist doesn't include that value, the flow fails. To update the Status to another value, in Flow Builder, edit the Update Lead Status element.
- **Update Opportunity Stage:** If the target's related opportunity Stage Name is Prospecting, update it to Qualification. The StageName field on opportunities is a dynamic picklist, so your company can use its own StageName values. The flow template checks for a value of Prospecting and sets the value to Qualification. If your StageName picklist doesn't include those values, the flow fails. To check for a different value, in Flow Builder edit StageName filter value in the Get Opportunity Record element. To set the StageName to a different value, edit the Update Opportunity Stage element to use a StageName value that suits your business.

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### USER PERMISSIONS

To create cadences:

- High Velocity Sales Cadence Creator (Enterprise Edition)

OR

High Velocity Sales Cadence Creator Included (Performance and Unlimited Editions)

To create and edit flows:

- Manage Flow

## Using Platform Automation Tools with Sales Engagement

Add automation to Sales Engagement faster with flows designed specifically to perform common tasks. You can also use platform tools to automate your cadences when your use case doesn't fit the options included with Sales Engagement. Flow Builder, Apex, and APIs give you maximum flexibility to meet your specific business process needs.

### [Add Automation to Common Tasks with Standard Autolaunched Flows](#)

A standard autolaunched flow type is designed to execute automatically and perform common tasks. For example, when lead records update, you can automatically remove a lead from a cadence.

### [Add Prospects to a Cadence Automatically with Process Builder and Apex](#)

Save your sales reps from taking an extra step. To automatically add lead, contact, or person account records to a cadence when the records are created, create an Apex class and a process.

### [Remove Prospects from Cadences Automatically with Process Builder and Apex](#)

Save sales reps a step when they realize a prospect isn't ready to buy. Create an Apex class and a process to automatically remove prospects when reps change their status to Unqualified.

### [Automatically Set a Lead's Status When a Step Is Completed](#)

Use an Apex trigger to subscribe to Change Data Capture events from cadences. Update a lead's status to Contacted when a sales rep completes the First Touch step in the lead's cadence.

## Add Automation to Common Tasks with Standard Autolaunched Flows

A standard autolaunched flow type is designed to execute automatically and perform common tasks. For example, when lead records update, you can automatically remove a lead from a cadence.

1. In Flow Builder, click **New Flow**.
2. Click **Autolaunched Flow**.
3. Choose the cadence step flow template you want to work with.
4. Clone the template and customize its elements to fit your business.

With Sales Engagement, these autolaunched flow templates are included in Flow Builder. Flow templates must be activated before being cloned.

- **Remove Lead from Cadence on Opt-Out:** Removes a lead from all cadences when either the lead record DoNotCall field or HasOptedOutOfEmail field is set to true. This flow requires that the HasOptedOutOfEmail and DoNotCall fields on lead are visible to your Sales Engagement users. This flow only runs when the value of either of these fields changes from false to true.
- **Remove Unqualified Lead:** When the lead's Status changes to Unqualified, removes the lead from all cadences and sets the Completion Disposition to Disqualified. This flow requires that "Unqualified" is an active status.

### EDITIONS

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Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited Editions**, and available for an extra cost in **Professional and Enterprise Editions**. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To create cadences:

- High Velocity Sales Cadence Creator (Enterprise Edition)

OR

High Velocity Sales Cadence Creator Included (Performance and Unlimited Editions)

To create and edit flows:

- Manage Flow

## Add Prospects to a Cadence Automatically with Process Builder and Apex

Save your sales reps from taking an extra step. To automatically add lead, contact, or person account records to a cadence when the records are created, create an Apex class and a process.

 **Note:** You can't add Apex classes directly in production Salesforce orgs. Only Developer, trial, and sandbox orgs support direct Apex editing in Setup. To deploy Apex code in a production org, add it first to a sandbox org, test, and then promote it to the production org.

This example uses the `AssignTargetToSalesCadence` action. You can also build processes with the `RemoveTargetFromSalesCadence` action.

Set your process to start only upon record creation. Setting your process to run upon both record creation and edit creates duplicate targets within the cadence.

1. Create the Apex class.
  - a. From the Setup menu, choose **Developer Console**.
  - b. From the File menu, choose **New > Apex Class**.
  - c. Enter `EnrollTargetIntoSalesCadence` for class name. Click **OK**.
  - d. In the Developer Console, replace the code you see with the following Apex.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To create, edit, or view processes:

- Manage Flow
- AND
- View All Data

To define Apex triggers:

- Author Apex

To configure remote settings:

- Customize Application
- OR
- Modify All Data

To add prospects to cadences:

- Sales Engagement User
- OR
- Sales Engagement User Included

```
public class EnrollTargetIntoSalesCadence {

    @InvocableMethod(label='Enroll Target In Cadence' description='Uses REST Invocable Action to assign a Target to a Cadence')
    public static void enrollTarget(List<EnrollTargetRequest> targetsToEnroll) {
        System.debug('*** Targets to enroll *** ' + targetsToEnroll);
        if (targetsToEnroll != null) {
```

```

        for (EnrollTargetRequest req : targetsToEnroll) {
            System.debug('*** request *** ' + req);
            System.debug('\ttarget: ' + req.targetId);
            System.debug('\tsales cadence: ' + req.salesCadenceName);
            sendRequest(req.targetId, req.salesCadenceName);
        }
    } else {
        System.debug('*** null targetsToEnroll received ***');
    }
}

@future(callout = true)
private static void sendRequest(String targetId, String salesCadenceNameOrId) {
    String sfdcURL = URL.getSalesforceBaseUrl().toExternalForm();
    String actionsRestURL = sfdcURL + '/services/data/v45.0/actions';
    String assignTargetRESTUrl = actionsRestURL +
'/standard/assignTargetToSalesCadence';

    HttpRequest httpReq = new HttpRequest();
    httpReq.setMethod('POST');
    httpReq.setHeader('Authorization', 'OAuth ' + UserInfo.getSessionId());
    httpReq.setHeader('Authorization', 'Bearer ' + UserInfo.getSessionId());
    httpReq.setEndpoint(assignTargetRESTUrl);
    httpReq.setHeader('Content-Type', 'application/json');
    httpReq.setBody('{"inputs" : [{"salesCadenceNameOrId" : "' +
salesCadenceNameOrId + '", "targetId" : "' + targetId + '"}]}');

    String response = '';
    try {
        Http http = new Http();
        HttpResponse httpResponse = http.send(httpReq);
        if (httpResponse.getStatusCode() == 200) {
            response =
JSON.serializePretty(JSON.deserializeUntyped(httpResponse.getBody()));
        } else {
            System.debug('http response: ' + httpResponse.getBody());
            throw new CalloutException(httpResponse.getBody());
        }
    } catch (System.Exception e) {
        System.debug('ERROR! ' + e);
        throw e;
    }

    System.debug('response: ' + response);
}

public class EnrollTargetRequest {
    @InvocableVariable(required=true)
    public Id targetId;

    @InvocableVariable(required=true)
    public String salesCadenceName;
}
}

```

- e. Save the Apex class.
2. Create a process.
    - a. From Setup, enter *Process Builder* in the Quick Find box. Then click **Process Builder**.
    - b. Click **New**.
    - c. Name the process.
    - d. In the process starts when menu, choose **A record changes**.
    - e. Click **Save**.
    - f. In the Process Builder, click the **Add Object** node.
    - g. From the Object menu in the right pane, choose **Lead, Contact, or Person Account**.
    - h. Under Start the process, choose **only when a record is created**.  
Don't choose **when a record is created or edited**. This setting causes duplicate targets to appear in the cadence.
    - i. Click **Save**.
    - j. In the Process Builder, click the **+Add Criteria** node.
    - k. In the right pane, name the criteria.  
For example, call it something like *Trigger for Cadence Enrollment*.
    - l. Under Criteria for Executing Actions, click **No criteria—just execute the actions!**
    - m. Click **Save**.
    - n. In the Immediate Actions node to the right of the criteria node you just added, click **+Add Action**.
    - o. In the right pane, choose these settings.
      - Action Type: **Apex**
      - Action name: Enter a name for the action.
      - Apex Class: Choose the Apex class you created previously.
      - SalesCadenceName: For Value, enter the name of your cadence.
      - TargetId: For Type, choose **Field Reference**. For Value, click the field and search for Lead.Id, Contact.Id, or Account.Id depending on whether you want to add lead, contact, or person account records to the cadence.
    - p. Click **Save**.
    - q. Click **Activate** and then click **Confirm**.

## SEE ALSO:

[Create a Process](#)[Define Apex Triggers](#)

## Remove Prospects from Cadences Automatically with Process Builder and Apex

Save sales reps a step when they realize a prospect isn't ready to buy. Create an Apex class and a process to automatically remove prospects when reps change their status to Unqualified.

 **Note:** You can't add Apex classes directly in production Salesforce orgs. Only Developer, trial, and sandbox orgs support direct Apex editing in Setup. To deploy Apex code in a production org, add it first to a sandbox org, test, and then promote it to the production org.

This example uses the `RemoveTargetFromSalesCadence` action. You can also build processes with the `AssignTargetToSalesCadence` action.

Set your process to start when records are created or edited.

1. Create the Apex class.
  - a. From the Setup menu, choose **Developer Console**.
  - b. From the File menu, choose **New > Apex Class**.
  - c. Enter `RemoveTargetFromSalesCadence` for class name. Click **OK**.
  - d. In the Developer Console, replace the code you see with the following Apex.

### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

### USER PERMISSIONS

To create, edit, or view processes:

- Manage Flow
- AND
- View All Data

To define Apex triggers:

- Author Apex

To remove prospects from cadences:

- Sales Engagement User or Sales Engagement User Included
- OR
- Sales Engagement Cadence Creator or Sales Engagement Cadence Creator Included

```
public class RemoveTargetFromSalesCadence {

    @InvocableMethod(label='Remove Target From Cadence' description='Uses REST Invocable Action to remove a Target to a Cadence')
    public static void removeTarget(List<RemoveTargetRequest> targetsToRemove) {
        System.debug('*** Targets to remove *** ' + targetsToRemove);
        if (targetsToRemove != null) {
            for (RemoveTargetRequest req : targetsToRemove) {
                System.debug('*** request *** ' + req);
            }
        }
    }
}
```

```

        System.debug('\ttarget: ' + req.targetId);
        System.debug('\tcompletion reason code: ' + req.completionReasonCode);

        sendRequest(req.targetId, req.completionReasonCode);
    }
} else {
    System.debug('*** null targetsToRemove received ***');
}
}

@future(callout = true)
private static void sendRequest(String targetId, String completionReasonCode) {
    String sfdcURL = URL.getSalesforceBaseUrl().toExternalForm();
    String actionsRestURL = sfdcURL + '/services/data/v45.0/actions';
    String removeTargetRESTUrl = actionsRestURL +
'/standard/removeTargetFromSalesCadence';

    HttpRequest httpReq = new HttpRequest();
    httpReq.setMethod('POST');
    httpReq.setHeader('Authorization', 'OAuth ' + UserInfo.getSessionId());
    httpReq.setHeader('Authorization', 'Bearer ' + UserInfo.getSessionId());
    httpReq.setEndpoint(removeTargetRESTUrl);
    httpReq.setHeader('Content-Type', 'application/json');
    httpReq.setBody('{"inputs" : [{"completionReasonCode" : "' +
completionReasonCode + '", "targetId" : "' + targetId + '"}]}');

    String response = '';
    try {
        Http http = new Http();
        HttpResponse httpResponse = http.send(httpReq);
        if (httpResponse.getStatusCode() == 200) {
            response =
JSON.serializePretty(JSON.deserializeUntyped(httpResponse.getBody()));
        } else {
            System.debug('http response: ' + httpResponse.getBody());
            throw new CalloutException(httpResponse.getBody());
        }
    } catch (System.Exception e) {
        System.debug('ERROR! ' + e);
        throw e;
    }

    System.debug('response: ' + response);
}

public class RemoveTargetRequest {
    @InvocableVariable(required=true)
    public Id targetId;

    @InvocableVariable(required=true)
    public String completionReasonCode;
}
}

```

- e. Save the Apex class.
2. Create a process.
    - a. From Setup, enter *Process Builder* in the Quick Find box. Then click **Process Builder**.
    - b. Click **New**.
    - c. Name the process.
    - d. In the process starts when menu, choose **A record changes**.
    - e. Click **Save**.
    - f. In the Process Builder, click the **Add Object** node.
    - g. From the Object menu in the right pane, choose **Lead, Contact, or Person Account**.
    - h. Under Start the process, choose **when a record is created or edited**.
    - i. Click **Save**.
    - j. In the Process Builder, click the **+Add Criteria** node.
    - k. In the right pane, name the criteria.  
For example, call it something like *Trigger for Cadence Removal*.
    - l. Under Criteria for Executing Actions, click **Formula evaluates to true**.
    - m. Insert the following formula into the Build Formula section.

```
NOT (ISNEW ()) && ISPICKVAL ([Lead].Status, "Unqualified")
```

The NOT (ISNEW ()) statement is used to evaluate records that were not newly added into the org. This code block also assumes that you want to use the Lead Status value of Unqualified as the criteria for removing a lead from cadences. Replace this value (or this field) to suit your own business processes.

- n. Click **Save**.
- o. In the Immediate Actions node to the right of the criteria node you just added, click **+Add Action**.
- p. In the right pane, choose these settings.
  - Action Type: **Apex**
  - Action name: Enter a name for the action.
  - Apex Class: Choose the Apex class you created previously.
  - CompletionReasonCode: For Value, enter *ManuallyRemoved*.
  - TargetId: For Type, choose **Field Reference**. For Value, click the field and search for Lead.Id, Contact.Id, or Account.Id depending on whether you want to remove lead, contact, or person account records from the cadence.
- q. Click **Save**.
- r. Click **Activate** and then click **Confirm**.

## Automatically Set a Lead's Status When a Step Is Completed

Use an Apex trigger to subscribe to Change Data Capture events from cadences. Update a lead's status to Contacted when a sales rep completes the First Touch step in the lead's cadence.

Start by enabling change data capture for the `ActionCadenceStepTrackerChangeEvent` object. Then, create a change event trigger. Finally, change a step's state and see how a lead's status updates automatically. To use this example, you need a cadence with a step called First Touch. The cadence must have at least one lead added as a target.

 **Note:** Remember that Apex triggers for change events are asynchronous. After a sales rep marks a step as completed, a short delay can occur before the related lead's status is updated.

### Enable Change Data Capture for the `ActionCadenceStepTrackerChangeEvent` Object

Before you can receive change notifications for cadence steps, you must enable the `ActionCadenceStepTrackerChangeEvent` object for notifications.

1. From Setup, in the Quick Find box, enter *Change Data Capture*, and then select **Change Data Capture**.
2. In Available Entities, select **Cadence Step Tracker (ActionCadenceStepTracker)**, and then click the > arrow.
3. Save your changes.

### Enable Change Data Capture for the `ActionCadenceStepTrackerChangeEvent` Object

Using the Developer Console, create a trigger on the `ActionCadenceStepTracker` change event.

1. Click the gear icon, and then select **Developer Console**.
2. In the Developer Console, select **File > New > Apex Trigger**.
3. In the Name field, enter the name of your trigger. We use *UpdateLeadOnStepCompletionTrigger*.
4. From the dropdown, select **ActionCadenceStepTracker**.
5. Replace the default content with the following code.

```
trigger UpdateLeadOnStepCompletionTrigger on ActionCadenceStepTrackerChangeEvent (after insert)
    for(ActionCadenceStepTrackerChangeEvent event : Trigger.New) {
        EventBus.ChangeEventHeader header = event.ChangeEventHeader;
        List<String> recordIds = header.getRecordIds();

        System.debug('Received change event for ' +
            header.entityName +
            ' for the ' +
            header.changeType +
            ' operation.'
        );

        if(recordIds.size() == 0) {
            continue;
        }

        // Get ActionCadenceStepTracker records for completed steps where the target is
```

#### EDITIONS

Available in: Lightning Experience

Available with Sales Engagement in Sales Cloud, which is included in **Performance, Einstein 1, and Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

```

a lead
    List<ActionCadenceStepTracker> stepTrackers = [SELECT Id, ActionCadenceStepId,
ActionCadenceName, TargetId, StepType, StepTitle
                                                FROM ActionCadenceStepTracker
                                                WHERE      Id IN :recordIds
                                                AND State = 'Completed'
                                                AND Target.Type = 'Lead'
                                                AND StepTitle LIKE 'First
Touch%'];

    if(stepTrackers != null && stepTrackers.size() > 0) {
        System.debug('Found ' + stepTrackers.size() + ' step tracker events.');
```

```

        List<Lead> leads = new List<Lead>();
        for(ActionCadenceStepTracker stepTracker : stepTrackers) {
            System.debug('Adding the lead ID ' + stepTracker.TargetId + ' to Lead
list.');
```

```

            Lead lead = new Lead(Id=stepTracker.TargetId, Status='Contacted');
            leads.add(lead);
        }

        update leads;
    } else {
        System.debug('Did not find any completed First Touch step trackers that are
related to leads');
```

```

    }
}

```

This change event trigger iterates through each received change event message in `Trigger.New`. For each event, we get the ID of the `ActionCadenceStepTracker` that triggered the event. Then, we use the ID of the step tracker to query for the `ActionCadenceStepTracker` record. We check to verify that the related step's name is `First Touch`, the state is `Completed`, and the target of the cadence is a lead.

If the cadence step meets that criteria, the state of the related lead is updated to `Contacted`.

## Verify the Trigger

Set the log level to capture debug messages from Apex triggers, then verify that your new trigger updates a lead's status.

1. From Setup, in the Quick Find box, enter `Debug Logs`, and then select **Debug Logs**.
2. Click **New**.
3. For Traced Entity Type, select **Automated Process**.
4. Select the time period for log collection. We suggest an hour or less.
5. For Debug Level, click **New Debug Level**. Enter `CustomDebugLevel` for the name, and then accept the other default selections.
6. Save your changes.
7. In Sales Engagement, find your cadence that has the First Touch step. Set this step to `Completed`.
8. Verify that the lead's status is updated to `Contacted`.

- In Debug Logs, click **View** next to the automated process log to see the System.debug messages from your new trigger.

SEE ALSO:

[Test Change Event Triggers](#)

## Automate Sales Outreach with a Buyer Assistant

Generate leads, deliver personalized conversations, and close deals faster with a buyer assistant. Buyer Assistant bots transform the web-to-lead experience and help your sales team sell more. Each buyer assistant includes CRM-powered dialogs and automation flows that help it to connect with customers. A buyer assistant can pitch your products' value after business hours, notify relevant team members when a customer is chatting, intelligently route leads to your sales team, and schedule customer meetings for your sales team. After creating a buyer assistant bot, you can personalize the conversation experience and adjust the built-in flows to meet your business needs. Get your buyer assistant up and running quickly using the guided onboarding experience.

### [Setting Up a Buyer Assistant](#)

Add a buyer assistant to your website quickly with a guided onboarding experience. We help you create and personalize your Buyer Assistant bot, enable required features, and set your bot up for success. To get started, go to the Buyer Assistant page in Setup.

## Setting Up a Buyer Assistant

Add a buyer assistant to your website quickly with a guided onboarding experience. We help you create and personalize your Buyer Assistant bot, enable required features, and set your bot up for success. To get started, go to the Buyer Assistant page in Setup.

- [Considerations for Setting Up a Buyer Assistant](#)

Before setting up a buyer assistant, review the related considerations.

- [Personalizing the Conversation Experience](#)

Buyer Assistant bots include building blocks that help them navigate conversations and perform tasks. Learn about the different parts of your buyer assistant and start personalizing them.

- [Route Customers to Your Sales Team](#)

Distribute incoming messages among available sales team members using a conversation queue, let your Buyer Assistant bot route conversations to team members, and add an Omni-Channel flow to your bot's actions.

- [Let Your Sales Team Connect with Customers](#)

Get your sales team ready to chat with customers. Create a Messaging Session record page so that your team can manage conversations and live chat from one place. And create a custom Messaging Session compact layout so your team members can see relevant information about incoming chats in their Omni-Channel widget.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in **Performance** and **Unlimited** Editions

Available with Sales Engagement, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Professional** and **Enterprise** Editions

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## 5. [Start Chatting with Customers](#)

Connect the messaging channel to your website and embed your bot on your website.

SEE ALSO:

[Einstein Bots](#)

## Considerations for Setting Up a Buyer Assistant

Before setting up a buyer assistant, review the related considerations.

### General

- When you create a bot from the Buyer Assistant setup page, we complete a few setup steps for you. You can make changes as needed.
  - We create the Messaging for In-App and Web User permission set. Make sure that you assign it to your sales team and sales leaders who supervise your team.
  - If it isn't enabled, we turn on Einstein Bots.
  - If it isn't enabled, we turn on Omni-Channel.
  - We create a messaging channel, routing configuration, and conversation queue to manage incoming messages.
  - We create and configure the Send to Record Owner flow and Route to Bot flow.
- If you create a Buyer Assistant bot using the enhanced bot template, you don't see the guided onboarding experience. Instead, you see the [enhanced bots guided setup flow](#).
- Buyer Assistant system limitations are the same as [Einstein Bots system limitations](#).
- When a buyer assistant creates a lead, the lead and its associated messaging session are assigned using your [lead assignment rules](#).
- Buyer Assistant isn't supported in Government Cloud. Don't turn on Buyer Assistant in Government Cloud Plus organizations. Contact your Salesforce account executive for more details.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in **Performance** and **Unlimited** Editions

Available with Sales Engagement, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Professional** and **Enterprise** Editions

## Using Inbox with a Buyer Assistant

- If you use the Buyer Assistant permission set to access Salesforce Inbox, you can send available times and schedule meetings only through a Buyer Assistant bot. Other Inbox features, such as email tracking, aren't available through this permission set.
- To use Inbox features, your team must connect their Microsoft or Gmail calendar to Salesforce.
- Available times are based on the primary calendar of a record owner's connected Outlook or Google calendar only. The available times that a customer sees update as their record owner's availability changes.
- If your team connects their Google calendar to Salesforce, a Google Meet link is added to events scheduled by Inbox. If you use a different virtual conferencing solution, you can manually generate the meeting link using that solution's tools and add it after the event invitation is generated.

SEE ALSO:

[Learn About Einstein Bots Compliance](#)

## Personalizing the Conversation Experience

Buyer Assistant bots include building blocks that help them navigate conversations and perform tasks. Learn about the different parts of your buyer assistant and start personalizing them.

### [Key Terms and Concepts for Personalizing Your Buyer Assistant](#)

Before personalizing your Buyer Assistant bot, learn how it performs tasks such as identifying who is chatting, scheduling meetings, and creating lead records for new customers.

## Key Terms and Concepts for Personalizing Your Buyer Assistant

Before personalizing your Buyer Assistant bot, learn how it performs tasks such as identifying who is chatting, scheduling meetings, and creating lead records for new customers.

### Omni-Channel

Omni-Channel makes it easy to prioritize and route messaging sessions to your team members. Dynamically route messaging sessions from your website to your bot and then to your team with Omni-Channel flows. Prioritize and assign messaging sessions using queues. And manage your team members' capacity using routing configurations. Buyer Assistant bots include a pre-built queue and routing configuration that you can customize to meet your business needs.

### Flows

Flows automate your team's repetitive business processes. You can trigger a flow to run in multiple ways, including record changes, schedules, customer interactions, or the completion of other flows. Buyer Assistant bots include several flows that you can explore and customize in Flow Builder. You can also add more to meet your business needs.

### Dialogs

Dialogs are conversation snippets that control a bot's behavior. You can associate dialogs with dialog intents that can understand variations in customer input. Buyer Assistant bots include dialogs that handle different parts of a customer conversation, such as greeting the customer or collecting information. You can customize the included dialogs and add more to meet your business needs in the Bot Builder.

To see an overview of your bot's conversational framework, check out the Map View. In the Bot Builder, go to the Dialogs page and click the dropdown in the header bar. Then select **Map**.

### Variables

Variables store the information that you collect from customers or output created by Salesforce. You can use them in dialog actions as inputs and outputs and in bot messages. Buyer Assistant bots include several variables that store information that is used in flows, dialogs, and other components. You can add custom variables to meet your business needs in the Bot Builder.

### Entities

Entities define what type of information are stored in variables. With entities, you can share customer information across multiple variables. Buyer Assistant bots use multiple types of entities. System entities store one of these data types: Boolean, Currency, Date, DateTime, Email Address, Number, Object, Phone Number, and Text. Boolean entities store yes or no answers. And you can create custom text entities to enforce patterns or categorize synonyms as one value in the Bot Builder.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in **Performance** and **Unlimited** Editions

Available with Sales Engagement, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Professional** and **Enterprise** Editions

## Route Customers to Your Sales Team

Distribute incoming messages among available sales team members using a conversation queue, let your Buyer Assistant bot route conversations to team members, and add an Omni-Channel flow to your bot's actions.

Let your buyer assistant access Salesforce objects and perform actions that require additional permissions. Select a user for your Buyer Assistant bot and assign them the Buyer Assistant permission set. Then go to the Bots Overview page, select **Custom User**, and assign that user to the bot. When you're done making changes, activate the bot.

To let your sales team members use queues and other routing features, assign them the Messaging for In-App and Web User permission set.

1. To distribute conversations among available sales team members, add queue members to the conversation queue. Queue members can be individuals, roles, public groups, territories, connections, or partner users. Depending on your sharing settings, only queue members and users above them in the role hierarchy can own records in the queue.
2. By default, your buyer assistant routes conversations to the record owner associated with the customer. Review the Send to Record Owner flow and start customizing how conversations route to your team. For example, add powerful routing rules to route conversations based on specified criteria.
3. To trigger routing, add the Send to Record Owner flow to your bot's Route Chat to Omni dialog.
  - a. To launch Bot Builder, click your Buyer Assistant bot's name. Then deactivate your bot so you can make edits.
  - b. On the Dialogs page, click the **Route Chat to Omni** dialog under Routing.
  - c. In the Step Properties panel for the Rules step, add a Set Routing Type rule action. Set the routing type to **Omni-Channel Flow** and the route destination to **Buyer Assistant - Send to Record Owner**. Then select **Route Destination Id (Id)** as the destination variable.
  - d. Add a Transfer Rule action. Select **Route Destination Id (Id)** as the destination variable. The side panel now has three rule actions: Call Dialog, Set Routing Type, and Transfer.
  - e. Delete the Message dialog step and then save your changes.

Next, fine-tune your bot's routing and add it to your website.

SEE ALSO:

[Create Queues](#)

[Configure Your Routing Rules](#)

[Assignment Rules](#)

[Transfer Conversations with the Set Routing Type Dialog Step](#)

## Let Your Sales Team Connect with Customers

Get your sales team ready to chat with customers. Create a Messaging Session record page so that your team can manage conversations and live chat from one place. And create a custom Messaging Session compact layout so your team members can see relevant information about incoming chats in their Omni-Channel widget.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in **Performance** and **Unlimited** Editions

Available with Sales Engagement, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Professional** and **Enterprise** Editions

### USER PERMISSIONS

To assign a custom chatbot user:

- Manage Users

To create or edit queues:

- Customize Application

AND

Manage Public List Views

### Help Your Team Manage Sales Conversations

Let your sales team manage conversations and live chat from one place. Create a Messaging Session record page that contains conversation and customer record components. Then create a compact layout so your team can see more information about incoming chats in their Omni-Channel widget.

## Help Your Team Manage Sales Conversations

Let your sales team manage conversations and live chat from one place. Create a Messaging Session record page that contains conversation and customer record components. Then create a compact layout so your team can see more information about incoming chats in their Omni-Channel widget.

1. To let your team see their messaging session details in contact records, create a contact action.
  - a. For the action type, select **Update a Record**. And for the standard label type, select **Update [Record]**.
2. To let team members track their sales conversations easily, create a Messaging Session record page.
  - a. For the page template, select **Pinned Left Sidebar (2 regions)** or **Header and Left Sidebar**.
  - b. In Lightning App Builder, add the Enhanced Conversation component to the left sidebar. Then add the Highlights component and two Related Records components to the right side of the page.
  - c. Select a Related Record component and label it Contact. Then edit the Lookup Field. For the First Lookup, select **Messaging User Contact**. And for the Second Lookup, select **Use This Contact**.
  - d. Select the other Related Record component and label it Lead. Then edit the Lookup Field. For the First Lookup, select **Lead**. And for the Second Lookup, select **Use This Lead**.
  - e. Assign this page as the app default for Online Sales, Sales, and Sales Console.
3. To see your customer's name in the Omni-Channel widget and record page, create a custom Messaging Session field that stores the chatting customer's name.
  - a. For the data type, select **Formula**. And for the formula return type, select **Text**.
  - b. In the Advanced Formula tab, insert the Messaging User Name field. After the field's API name, add `& ' | Ready to Live Chat'` so that the formula field contains `MessagingEndUser.Name & ' | Ready to Live Chat'`.
4. To show the Messaging Session object in your team members' Omni-Channel widget, create a compact layout for the Messaging Session object.
  - a. Add the custom Messaging Session field you created and the Status, Start Time, and Origin fields to the layout.
  - b. Change the primary compact layout to your custom record page.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in **Performance** and **Unlimited** Editions

Available with Sales Engagement, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Professional** and **Enterprise** Editions

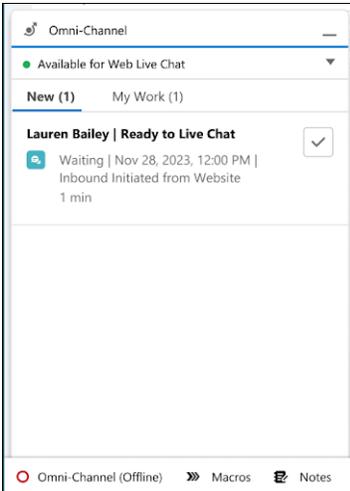
### USER PERMISSIONS

To create Lightning pages:

- Customize Application

To view Lightning pages:

- View Setup and Configuration



## SEE ALSO:

[Create Object-Specific Quick Actions](#)

[Lightning Pages](#)

[Build a Formula Field](#)

[Compact Layouts](#)

## Start Chatting with Customers

Connect the messaging channel to your website and embed your bot on your website.

- To connect the messaging channel to your website, create and publish an embedded service deployment.
  - Click **New Deployment** and then select the Messaging for In-App and Web conversation type.
  - For the deployment destination, select **Web**. Then enter a unique name for the deployment.
  - Enter the top-level domain name of the website, for example, yourcompany.com.
  - Select the Buyer Assistant Messaging Channel and save your changes. Then create and publish the deployment.

After your deployment is created, you can edit your messaging settings, branding, and pre-chat form fields. Always publish the deployment after making edits.

- To let the bot see whether your sales team can receive incoming chats, [create an online presence status](#) with Messaging in the Selected Channels list. Optionally, create more statuses, such as one that indicates a user is busy.
  - To give your team access to presence statuses, create a permission set. Click **Service Presence Statuses Access** and edit it. Select the presence statuses that you want to associate with the permission set. Then save your changes and assign the permission set to your team.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in **Performance** and **Unlimited** Editions

Available with Sales Engagement, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Professional** and **Enterprise** Editions

### USER PERMISSIONS

To manage Messaging experiences:

- Messaging for In-App and Web Agent

- b. Users with a presence status are assigned to the default presence configuration. Optionally, [create custom presence configurations](#) to limit how much work each team member can take on.
- 3. Before adding your buyer assistant to your website, make sure that your sales team has the Messaging for In-App and Web User permission set. To embed your Buyer Assistant bot on your website, copy your bot's code snippet from the Embedded Service Deployment Settings page. Then go to your website and paste the snippet before the closing body tag on each web page where you want a chat button to appear.
- 4. To collect and send pre-chat data from your website to Salesforce, pass the pre-chat values programmatically.

Add this code snippet to your website's <head> element. Replace customerLocale and customerTimeZone with your hidden pre-chat field API names. If you have an Experience Builder website, add the code snippet to the Head Markup.

```
<script type='text/javascript'>
  window.addEventListener("onEmbeddedMessagingReady", () => {
    console.log("Received the onEmbeddedMessagingReady event...");
    const customerLocale = navigator.language; console.log("locale:" +
customerLocale);
    const customerTimeZone = Intl.DateTimeFormat().resolvedOptions().timeZone;
    console.log("timezone:" + customerTimeZone);

    // Send data to Salesforce
    embeddedservice_bootstrap.prechatAPI.setHiddenPrechatFields(
      {
        "Locale": customerLocale,
        "Timezone": customerTimeZone
      }
    );
  });
</script>
```

- 5. After you add your buyer assistant to your website, test it. If you have a large team, consider gathering a small group of users to test out the buyer assistant
  - a. To test your Buyer Assistant bot from a team member's perspective, go to App Launcher and then open the Lightning Sales Console app. From the utility bar, select **Omni-Channel** and then change your status to Online. After you click the chat button in the next step, verify that you receive a chat request in Sales Console.
  - b. To test your bot from your customer's perspective, open another window or tab and navigate to your website. To start the chat, click the chat button. From the menu, select **Connect with Sales** and then enter the requested information.

#### [Gather Customer Information Using Pre-Chat](#)

Add custom fields to your pre-chat form to store your chatting customer's local and time zone information. Then you can auto-fill these hidden pre-chat fields when the conversation begins.

#### SEE ALSO:

[Considerations and Limitations for Messaging for In-App and Web Presence Status Settings](#)  
[Lightning Sales Console](#)

## Gather Customer Information Using Pre-Chat

Add custom fields to your pre-chat form to store your chatting customer's local and time zone information. Then you can auto-fill these hidden pre-chat fields when the conversation begins.

1. Create custom parameters for your pre-chat form.
  - a. From Setup, in the Quick Find box, enter *Messaging Settings*, and then select **Messaging Settings**. Then click **Buyer Assistant Messaging Channel**.
  - b. Create a custom parameter that stores your customer's locale. Save your changes and then create another custom parameter that stores your customer's time zone. Save your changes. For both parameters, be sure to match the parameter name and channel variable name.
2. Add hidden fields to your pre-chat form.
  - a. From Setup, in the Quick Find box, enter *Embedded Service Deployments*, and then select **Embedded Service Deployments**.
  - b. Open the Buyer Assistant embedded service deployment, and then click **Edit Pre-Chat**.
  - c. Under Hidden Pre-Chat Fields, select the custom parameters you created. Then save and publish your changes.
3. Add custom fields to your messaging session object.
  - a. From Setup, in Object Manager, select the Messaging Session object.
  - b. From the Fields & Relationships tab, create a custom field for your customer's locale. Then create another custom field for your customer's time zone.
4. Map the hidden pre-chat fields to flow variables in the Buyer Assistant - Route to Bot flow.
  - a. From the Buyer Assistant Messaging Channel settings, create a parameter-mapping variable for your customer's locale. Save your changes, and then create another variable for your customer's time zone. For both variables, add a flow variable name that describes the action. Save your changes.
  - b. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**. Find and select **Buyer Assistant - Route to Bot** from the list.
  - c. Add an input variable for each pre-chat field. The API Name must be identical to the Flow Variable Name from Parameter Mappings. The Data Type must be set to Text. And the variable must be available for input.
  - d. Create an Update Records element in the flow after the Route Work element. Name the element Update Messaging Session. Make sure that the element identifies records based on conditions and set fields individually. For the object type, select **Messaging Session**, filter based on the recordId value, and enter each pre-chat field and its corresponding flow variable name. Then click **Done**.
  - e. Save your changes and activate the flow.
5. Create and map bot context variables to the custom object fields.
  - a. Navigate to your Buyer Assistant bot. From the Bot Builder menu, select **Variables**.
  - b. Create context variables that match the custom Messaging Session fields you created. For the data type, select **Text**. Save your changes.
  - c. To map your custom context bot variables to the custom fields on the Messaging Session object, in the Variables list view, click your customer locale context variable.
  - d. Create a context variable mapping. For the connection type, select **Embedded Messaging**. And for the field name, select **Messaging Session**.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in **Performance** and **Unlimited** Editions

Available with Sales Engagement, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Professional** and **Enterprise** Editions

### USER PERMISSIONS

To customize pre-chat:

- Customize Application

AND

Modify Metadata Through Metadata API Functions

- e. Save your changes and repeat the mapping steps for the time zone context variable. Then activate your bot.

Next, create a messaging channel and connect it to your website. Then embed your bot on your website and add code that collects data for your pre-chat fields.

SEE ALSO:

[Customize Pre-Chat for Messaging for In-App and Web](#)

[Map Pre-Chat Values in Omni-Channel Flow](#)

[Use Pre-Chat with an Enhanced Bot](#)

## Relationship Selling

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Close deals faster by focusing on the relationships between contacts on your opportunities and accounts. Visualize your contacts in a relationship map and let Einstein generative AI add buyer profile data to your contacts automatically.

### [Automatic Contact Enhancements](#)

Let generative AI identify your contacts' buying behavior and company information automatically from your email interactions. Build content-rich profiles for all your contacts to draw accurate buyer relationship maps so that you can close deals.

### [Buyer Relationship Map](#)

Use the buyer relationship map on opportunities and accounts to visualize contacts across company levels. Discover key stakeholders, deal champions, and potential risks. After you enable Buyer Relationship Map, the Seniority Level, Department Group, and Buyer Attributes fields are available to add to your contacts.

## Automatic Contact Enhancements

Let generative AI identify your contacts' buying behavior and company information automatically from your email interactions. Build content-rich profiles for all your contacts to draw accurate buyer relationship maps so that you can close deals.

 **Example:** Carole White is a VP in the Finance department and the buyer in an account renewal. An email you received from her contains in the message body "We're creating a purchase order for 50 licenses for Einstein Activity Capture." The same email has a signature block that contains Executive VP, Finance below Carole's name. From this interaction, Automatic Contact Enhancements uses generative AI to fill in seniority level, department group, and buyer attributes on Carole's contact record.

### [How Automatic Contact Enhancements Works with the Buyer Relationship Map](#)

Automatic Contact Enhancements helps keep buyer relationship maps up-to-date so that you always have the most robust contact information without any manual data entry. Automatic Contact Enhancements uses generative AI to identify buyer attributes, department group, and seniority level from a user's email activity. These values are then added to the contact and shown in the buyer relationship map.

### [Considerations for Automatic Contact Enhancements](#)

Learn about requirements, impacted fields, and supported languages for Automatic Contact Enhancements.

### EDITIONS

Available in: Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, Einstein 1 Sales Edition, and Developer** Editions with Sales Cloud

### [Set Up Automatic Contact Enhancements](#)

Turn on Automatic Contact Enhancements, add fields to the contact record layout and list views, and recognize when the feature is on.

#### SEE ALSO:

[Einstein Generative AI](#)

[Einstein Activity Capture](#)

[Object Reference for the Salesforce Platform: Contact](#)

## How Automatic Contact Enhancements Works with the Buyer Relationship Map

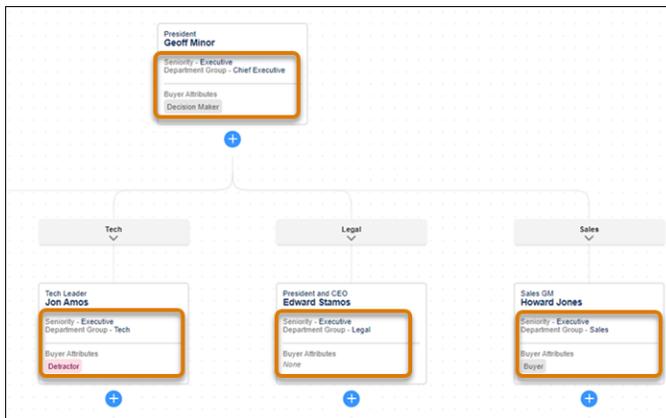
Automatic Contact Enhancements helps keep buyer relationship maps up-to-date so that you always have the most robust contact information without any manual data entry. Automatic Contact Enhancements uses generative AI to identify buyer attributes, department group, and seniority level from a user's email activity. These values are then added to the contact and shown in the buyer relationship map.

To appear on a buyer relationship map, a contact must have a seniority level and a department group.

#### EDITIONS

Available in: Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, Einstein 1 Sales Edition,** and **Developer** Editions with Sales Cloud



#### SEE ALSO:

[Einstein Generative AI](#)

[Automatic Contact Enhancements](#)

[Buyer Relationship Map](#)

[Einstein Activity Capture](#)

## Considerations for Automatic Contact Enhancements

Learn about requirements, impacted fields, and supported languages for Automatic Contact Enhancements.

### Requirements

- [Enable Einstein Generative AI](#).
- [Enable Einstein Activity Capture](#).
- If you enabled Einstein Automated Contacts, don't enable Automatic Contact Enhancements. The features aren't designed to run together. To enable Automatic Contact Enhancements, first disable Einstein Automated Contacts.

#### EDITIONS

Available in: Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, Einstein 1 Sales Edition, and Developer** Editions with Sales Cloud

### Contact Fields

Automatic Contact Enhancements adds these fields to a contact and subsequently updates them. These fields are shown on the buyer relationship map for an account or opportunity. To see the fields on the contact record, add them to the Contact record layout. Buyer Attributes, Department Group, and Seniority Level fields are available for all profiles except custom and minimum-access. To provide access, use field-level security in Object Manager.

- Department Group—Represents the business unit, function, or department that contacts belong to in their company.
- Seniority Level—Reflects the hierarchical position that contacts have in their company.
- Buyer Attributes (optional)—Reflect the roles that contacts have on a deal or account.

Automatic Contact Enhancements updates these existing fields on a contact.

- Fax
- MailingCity
- MailingCountry
- MailingPostalCode
- MailingState
- MailingStreet
- Phone (business phone)
- Title

### Contact Field Re-Enhancement

All 11 contact fields are updated automatically every 4 days with data from your latest email activity, with the following exceptions.

- Buyer Attributes, Department Group, or Seniority Level—After you update one of these fields manually, Automatic Contact Enhancements won't update any of the 3 fields for that contact. We don't want you to lose your work! For example, after you turn on Automatic Contact Enhancements, you update a contact's seniority level manually. After that, even if new data is detected in email activity, Automatic Contact Enhancements won't update the Seniority Level, Department Group, and Buyer Attributes for that contact.
- Fax, MailingCity, MailingCountry, MailingPostalCode, MailingState, MailingStreet, Phone, Title—After you update one of these fields manually, Automatic Contact Enhancements won't update any of the 8 fields for that contact. We don't want you to lose your work! For example, after you turn on Automatic Contact Enhancements, you update a contact's mailing address manually. After that, even if new data is detected in email activity, Automatic Contact Enhancements won't update the address, Fax, Phone, and Title for that contact.

## Contact Limitations

- Automatic Contact Enhancements doesn't update private contacts.
- Automatic Contact Enhancements doesn't update contacts added by Automatic Contact Creation unless they're in a Buyer Relationship Map.
- Contacts with the same email address are updated with the same changes at the same time. For example, if Automatic Contact Enhancements updates the job title on a contact that has `abc@xyz.com` email, all contacts with that email address have the job title updated.
- You can't change the text of Department Group and Seniority Level picklist value labels.
- To ensure that the buyer relationship map feature works as expected, don't change Buyer Attributes picklist value labels in Object Manager. For example, if you change `DETRACTOR` to `DETRACT`, the value isn't shown in red in a buyer relationship map.

## Email Usage

- After enablement, Automatic Contact Enhancements updates contact information from your new email interactions and up to 4 historical email interactions.
- Information from emails likely sent by bots or from unmonitored email accounts isn't used to complete contact fields. For example, emails with sender addresses containing "no-reply" or "@group.calendar.google.com" aren't used by Automatic Contact Enhancements.

## Supported Languages

Automatic Contact Enhancements supports emails in English only. The feature's generative AI ignores emails in other languages.

SEE ALSO:

[Einstein Generative AI](#)

[Einstein Activity Capture](#)

[Object Reference for the Salesforce Platform: Contact](#)

## Set Up Automatic Contact Enhancements

Turn on Automatic Contact Enhancements, add fields to the contact record layout and list views, and recognize when the feature is on.

Before you start, check that you've met the requirements in [Considerations for Automatic Contact Enhancements](#).

1. [Enable Einstein Generative AI](#) in Setup.
2. If you haven't already, enable Einstein Activity Capture.
3. From Setup, enter *autocreation* in the Quick Find box, and then select **Autocreation Settings**.
4. Turn on Automatic Contact Enhancements.
5. To see the Buyer Attributes, Department Group, and Seniority Level fields on the contact record, add the fields to the Contact record layout. You can also add them to list views. Buyer Attributes, Department Group, and Seniority Level fields are available with all profiles except custom and minimum-access. To provide access, use field-level security in Object Manager.

Name	Account Name	Email	Contact	Seniority Level	Department Group	Buyer Attributes
1 Alex Bell	Ursa Major Solar, Inc	alex.bell@ursamajortest.com	tuser	Executive	Human Resources	Detractor
2 Andy Pan	Ursa Major Solar, Inc	andy.pan@ursamajortest.com	tuser	Director or Manager	Tech	Technical Expert
3 Barry Dickson	Ursa Major Solar, Inc	barry.dickson@ursamajortest.com	tuser	Executive	Finance	Champion
4 Blake Camp	Ursa Major Solar, Inc	blake.camp@ursamajortest.com	tuser	VP	Tech	Executive Sponsor
5 Carol Right	Ursa Major Solar, Inc	carol.right@ursamajortest.com	tuser	CEO	Chief Executive	Executive Sponsor
6 Jack Barnett	Ursa Major Solar, Inc	jack.barnett@ursamajortest.com	tuser	Executive	Tech	Executive Sponsor, Technical Expert
7 John Doe	Ursa Major Solar, Inc	john.doe@ursamajortest.com	tuser	VP	Human Resources	Decision Maker, Evaluator
8 Sara Burns	Ursa Major Solar, Inc	sara.burns@ursamajortest.com	tuser	VP	Finance	Executive Sponsor
9 Trey Sun	Ursa Major Solar, Inc	trey.sun@ursamajortest.com	tuser	VP	Legal	Decision Maker

Automatic Contact Enhancements starts updating your contact records from your new email interactions and up to 4 historical email interactions. For a list of fields that are updated, see [Considerations for Automatic Contact Enhancements](#).

An indicator on contact records shows that the feature is on.

### EDITIONS

Available in: Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, Einstein 1 Sales Edition, and Developer** Editions with Sales Cloud

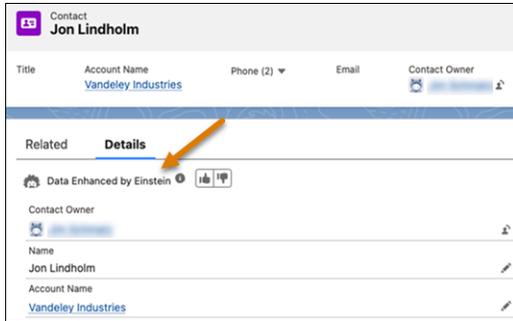
### USER PERMISSIONS

To enable or disable Automatic Contact Enhancements:

- View Setup and Configurations AND Customize Application

To view the Automatic Contact Enhancements setup page:

- View Setup and Configurations



SEE ALSO:

[Einstein Generative AI](#)

[Set Up Buyer Relationship Map](#)

[Einstein Activity Capture](#)

## Buyer Relationship Map

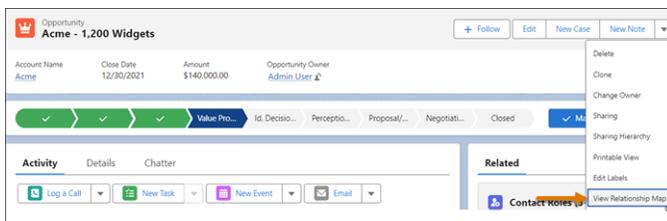
Use the buyer relationship map on opportunities and accounts to visualize contacts across company levels. Discover key stakeholders, deal champions, and potential risks. After you enable Buyer Relationship Map, the Seniority Level, Department Group, and Buyer Attributes fields are available to add to your contacts.

Access the map from any opportunity or account's action menu.

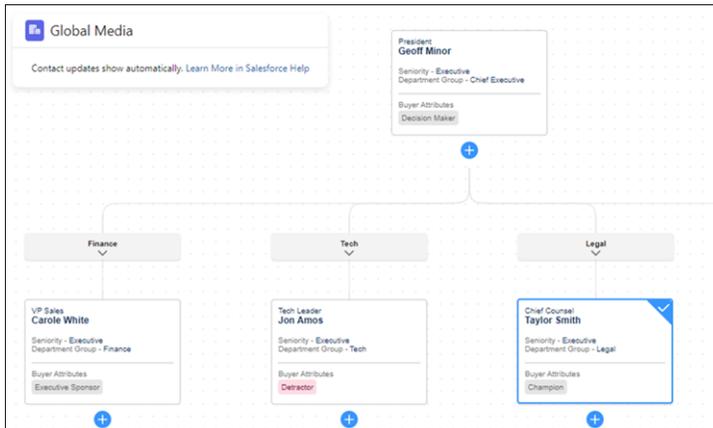
### EDITIONS

Available in: Lightning Experience

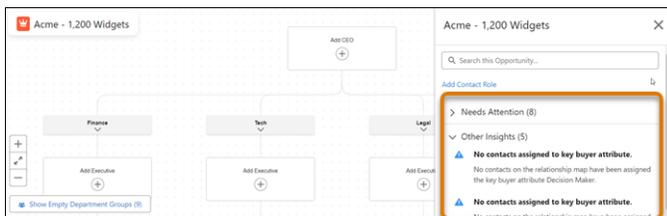
Available in: **Enterprise, Performance, Unlimited,** and **Einstein 1 Sales Edition** Editions with Sales Cloud



 **Example:** Here's a relationship map for an account showing key department groups such as Tech, Finance, and Legal. For more information about key values, see [Considerations for Buyer Relationship Map](#).



This relationship map for an opportunity has insights to help you complete the map.



### [Considerations for Buyer Relationship Map](#)

Learn about buyer relationship map requirements, fields, and key values.

### [Set Up Buyer Relationship Map](#)

Turn on Buyer Relationship Map and learn how to access it from an opportunity or account.

### [Add and Edit Contacts on the Buyer Relationship Map](#)

Learn how to work with contacts on the buyer relationship map.

SEE ALSO:

[How Automatic Contact Enhancements Works with the Buyer Relationship Map](#)

## Considerations for Buyer Relationship Map

Learn about buyer relationship map requirements, fields, and key values.

### Requirements

- Buyer Relationship Map is a different feature from [Einstein Relationship Insights](#). They aren't designed to run together.
- To show contacts on the map, contacts must have values for Seniority Level and Department Group fields. To automatically complete these values from your email activity, enable Automatic Contact Enhancements.

### New Contact Fields

Buyer Relationship Map makes these fields available for a contact.

- Department Group—Represents the business unit, function, or department that contacts belong to in their company.
- Seniority Level—Reflects the hierarchical position that contacts have in their company.
- Buyer Attributes (optional)—Reflect the roles that contacts have on a deal or account.

To see Buyer Attributes, Department Group, and Seniority Level on the contact record, add the fields to the Contact record layout. Buyer Attributes, Department Group, and Seniority Level fields are available for all user profiles except custom and minimum-access. To provide access, use field-level security in Object Manager.

### Key Field Values

Key values are minimum buyer attributes, department groups, and seniority levels that Salesforce recommends for an opportunity or account. If a buyer relationship map doesn't have contacts with key values, Salesforce prompts you to add them through insights. Having all key values represented by stakeholders on the map provides a complete picture of the deal or account, increasing sales success.

Key buyer attributes are:

- Business User
- Buyer
- Champion
- Decision Maker
- Detractor
- Executive Sponsor

Key department groups are:

- Chief Executive
- Finance
- Legal
- Tech

Key seniority levels are:

- CEO
- Director or Manager
- Executive
- VP

### EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Einstein 1 Sales Edition** Editions with Sales Cloud

## Limitations

- Person accounts aren't supported.
- Insights don't show for private contacts on the map.
- You can't change the text of Department Group and Seniority Level picklist value labels.
- To ensure that the buyer relationship map feature works as expected, don't change Buyer Attributes picklist value labels in Object Manager. For example, if you change `DETRACTOR` to `DETRACT`, the value isn't highlighted in red in a buyer relationship map.

SEE ALSO:

[Object Reference for the Salesforce Platform: Contact](#)

## Set Up Buyer Relationship Map

Turn on Buyer Relationship Map and learn how to access it from an opportunity or account.

1. From Setup, in the Quick Find box, enter `map`, and then select **Buyer Relationship Map**.
2. Turn on Buyer Relationship Map.  
The Buyer Attributes, Department Group, and Seniority Level fields are now available to add to contacts. To automatically complete these values from your email activity, enable Automatic Contact Enhancements.
3. To see the new fields on the contact record, add them to the Contact record layout. Buyer Attributes, Department Group, and Seniority Level fields are available with all profiles except custom and minimum-access. To provide access, use field-level security in Object Manager.

Access the map from any opportunity or account's action menu.

### EDITIONS

Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Einstein 1 Sales Edition** Editions with Sales Cloud

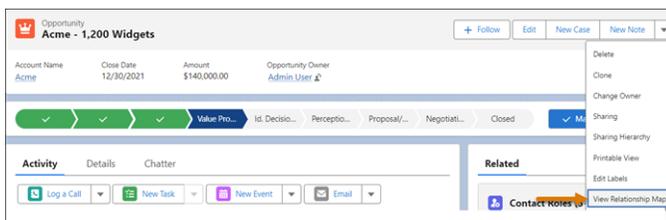
### USER PERMISSIONS

To enable or disable Buyer Relationship Map:

- Customize Application  
OR Modify All Data

To view the Buyer Relationship Map setup page:

- View Setup and Configurations



SEE ALSO:

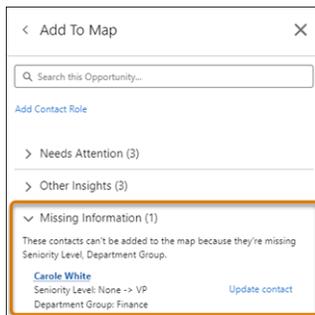
[Set Up Automatic Contact Enhancements](#)

## Add and Edit Contacts on the Buyer Relationship Map

Learn how to work with contacts on the buyer relationship map.

Contacts associated with the opportunity or account that have a seniority level and department group assigned are automatically shown on the buyer relationship map. These steps are for contacts that don't meet that criteria.

- To add a contact to the map, do one of the following.
  - If the contact is already associated with the opportunity or account, go to the side panel and open Missing Information. Find the contact you want to add. Edit or update the contact to assign a seniority level and department group. Then, it shows on the map.



- If the relationship map is for an account, click **+** in a level under a department group. In the side panel, click **Add Contact**. After saving the contact, it appears on the map.
- If the relationship map is for an opportunity and the contact isn't associated with the opportunity, add an opportunity contact role by clicking **Add Contact Role** in the side panel. After you add the role, the contact appears in Missing Information in the side panel. Edit or update the contact to assign a seniority level and department group. Then, it shows on the map.

Contacts added to the same level in a department group are grouped on the map.



- To edit a contact, do one of the following.
  - If the contact is shown on the map, select the contact. In the side panel, click **Edit**. The side panel shows a subset of contact fields. Update them and click **Save**.
  - If the contact isn't shown on the map, go to the side panel and open Missing Information. Next to a contact, click **Edit contact**. The side panel shows a subset of contact fields. Update them and click **Save**.

### EDITIONS

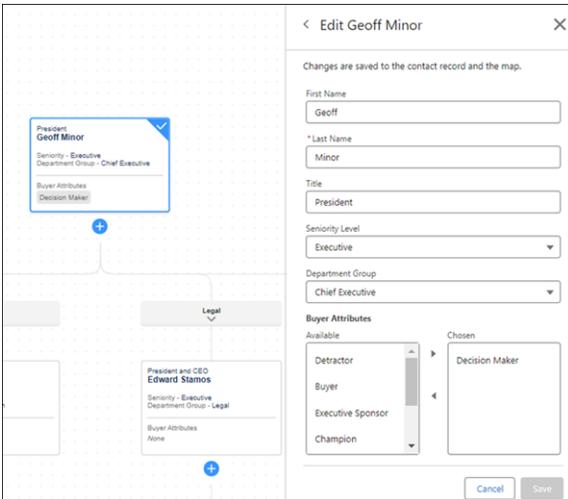
Available in: Lightning Experience

Available in: **Enterprise, Performance, Unlimited, and Einstein 1 Sales Edition** Editions with Sales Cloud

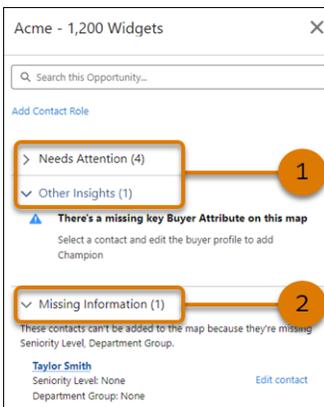
### USER PERMISSIONS

To create and edit contacts:

- Create and Edit on Contact



**Tip:** Use insights to identify areas of your map that are missing critical and optional key stakeholders (1). Find contacts in your account or opportunity with missing seniority levels and department groups that prevent them from appearing on the map (2).



SEE ALSO:

[How Automatic Contact Enhancements Works with the Buyer Relationship Map](#)

[Object Reference for the Salesforce Platform: Contact](#)

## Salesforce Meetings

Salesforce Meetings is a set of tools to enhance sales reps' interactions with prospects and customers. Reps can ensure everyone is aligned before a meeting starts by seeing valuable meeting information with Meeting Digest.

[Make Every Conversation Count with Salesforce Meetings \(English Only\)](#)

**Note:** Salesforce Meetings features are available in Lightning Experience on desktop only.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: all editions

### [Get Started with Salesforce Meetings](#)

Get your sales teams started with Salesforce Meetings. We recommend using an activity sync solution such as Einstein Activity Capture.

### [Meeting Preparation and Follow-Up with Meeting Digest](#)

Use the features in Meeting Digest, which is part of Salesforce Meetings, to prepare yourself and your teammates before a meeting or event. A little preparation helps to ensure that you've set the correct agenda and the right people are attending, which leads to more productive conversations.

SEE ALSO:

[Events and Calendars](#)

## Get Started with Salesforce Meetings

Get your sales teams started with Salesforce Meetings. We recommend using an activity sync solution such as Einstein Activity Capture.

### [Review the Sync Recommendations and Features for Salesforce Meetings](#)

To use Salesforce Meetings, we recommend using an activity sync solution such as Einstein Activity Capture. The Salesforce Meetings features that are available to sales reps depend on which sync product is used.

### [Use Einstein Activity Capture with Salesforce Meetings](#)

When you use Einstein Activity Capture to sync events from Microsoft or Google calendar applications to Salesforce, the Meeting Digest shows more details that help sales reps prepare for meetings. For example, on synced events, reps see job level and role information for attendees. And insights about the event provide notifications and recommended actions about the meeting.

### [Prepare to Use Salesforce Meetings](#)

Let sales reps get more out of their interactions with prospects and customers. Use Salesforce Meetings to give reps access to Meeting Digest, which provides an enhanced event layout.

SEE ALSO:

[Salesforce Meetings](#)

[Einstein Activity Capture](#)

## Review the Sync Recommendations and Features for Salesforce Meetings

To use Salesforce Meetings, we recommend using an activity sync solution such as Einstein Activity Capture. The Salesforce Meetings features that are available to sales reps depend on which sync product is used.

We recommend that you enable Einstein Activity Capture because it offers the most comprehensive meeting and event information when events are synced to Salesforce.

Review the Salesforce Meetings features included with each activity sync solution.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: all editions

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: all editions

	Einstein Activity Capture with Event Sync	Einstein Activity Capture without Event Sync	Lightning Sync	Salesforce for Outlook (Retiring)	Third- Party Sync Solution	No Sync Solution
Meeting Digest tab shown on the event record page	✓	✓	✓	✓	✓	✓
Attendee list	✓	✓	✓	✓	✓	✓
Attendee RSVP status	✓	✗	✗	✗	✗	✗
Enhanced job level and role classifications for attendees	✓	✗	✗	✗	✗	✗
Related record details	✓	✓	✓	✓	✓	✓
Activity timeline	✓	✓	✓	✓	✓	✓
Activity timeline event filtering	✓	✗	✗	✗	✗	✗
Event insights	✓	✗	✗	✗	✗	✗
Associated Documents in Quip, if Quip is enabled	✓	✓	✓	✓	✓	✓
Meeting Digest available in the Microsoft Teams Integration	✓	✗	✗	✗	✗	✗
Access to Zoom Integration features	✓	✓	✓	✓	✓	✓

## SEE ALSO:

[Use Einstein Activity Capture with Salesforce Meetings](#)

[Zoom Integration](#)

[Salesforce for Outlook \(Retiring\)](#)

## Use Einstein Activity Capture with Salesforce Meetings

When you use Einstein Activity Capture to sync events from Microsoft or Google calendar applications to Salesforce, the Meeting Digest shows more details that help sales reps prepare for meetings. For example, on synced events, reps see job level and role information for attendees. And insights about the event provide notifications and recommended actions about the meeting.

1. Follow the basic steps to [set up Einstein Activity Capture](#).
2. To get the most out of Salesforce Meetings, make sure that:
  - Meeting users have access to Einstein Activity Capture.
  - Meetings users are assigned to an Einstein Activity Capture configuration.
  - The Einstein Activity Capture configuration has events enabled, and event data is either moving in both directions or from the connected account to Salesforce.

Einstein Activity Capture includes more functionality that Salesforce Meetings users have access to. For example, email and events are captured from Microsoft or Google accounts and added to the activity timeline of related Salesforce records. Take some time to [learn about how Einstein Activity Capture works](#).

### SEE ALSO:

[Einstein Activity Capture](#)

[Review the Sync Recommendations and Features for Salesforce Meetings](#)

[Meeting Preparation and Follow-Up with Meeting Digest](#)

## Prepare to Use Salesforce Meetings

Let sales reps get more out of their interactions with prospects and customers. Use Salesforce Meetings to give reps access to Meeting Digest, which provides an enhanced event layout.

Before using Salesforce Meetings, we recommend that you use an activity sync product such as Einstein Activity Capture.

1. From Setup, enter *Meetings* in the Quick Find box, and then select **Settings**.
2. Review the sync recommendations.
3. Confirm that the event page layout has the right components for your reps.
 

The default event layout includes the Meeting Digest and a column to add other components. If you customized the event layout, use Lightning App Builder to add the Meeting Digest component to a tab or wide area on the page.

 **Tip:** In addition to the Meeting Digest tab, the event record layout includes the Associated Documents component. For reps to see that component, make sure Quip is set up.

### SEE ALSO:

[Lightning App Builder](#)

[Quip in Salesforce](#)

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: all editions

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: all editions

### USER PERMISSIONS

To create and save Lightning pages in the Lightning App Builder:

- Customize Application

## Meeting Preparation and Follow-Up with Meeting Digest

Use the features in Meeting Digest, which is part of Salesforce Meetings, to prepare yourself and your teammates before a meeting or event. A little preparation helps to ensure that you've set the correct agenda and the right people are attending, which leads to more productive conversations.

▶ [Make Every Conversation Count with Salesforce Meetings \(English Only\)](#)

With Salesforce Meetings, you see the Meeting Digest tab on the event detail record. Use the features on the tab to prepare for the meeting.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: all editions

The screenshot displays the 'Meeting Digest' interface for an event titled 'Presidio Tech Meeting'. The interface includes the following elements:

- Event Header:** Shows the event name, location, start time (8/19/2020 - 9:00 AM), and end time (8/19/2020 - 10:00 AM). Action buttons include 'Launch Meeting', 'Check-In', 'Edit', and 'Delete'.
- Attendees (7):** A list of attendees categorized by organization.
  - Outside your Organization:** Dan Fitzgerald (Executive, Sales), Susan Gant (Legal), and ngillette@foxtrot.com.
  - Within your Organization:** Tracy Hwa (Organizer, Sales Representative), Mary Patel (Executive), and Ann Boh (Sales Engineer, Sales).
- Executive Declined:** A card for Dan Fitzgerald, CPO - Chief Product Officer, with options to 'Reschedule Meeting' or 'Snooze'.
- Opportunity Card:** 'Displaytech - Add-On Business' with account name 'Foxtrot Holdings', amount '\$108,000.00', and close date '5/2/2022'. It features a sales pipeline with stages: Value Pro..., Id. Decisi..., Percepti..., and Proposal/... The current stage is 'Value Proposition'.
- Key Fields:** A section for 'Guidance for Success' with a 'Next Step' and a list of questions: 'Where are they in the buying cycle?', 'What's the process to generate purchase orders?', and 'What's the status of quantifying a Return on Investment with them?'.
- Upcoming & Overdue:** A task list for August 2020 with progress bars and status indicators.
- Associated Documents:** A list of documents including 'Presidio Tech - Kickoff Report', 'Sales Team Weekly Report', and 'Competitor Analysis'.

This screenshot shows Meeting Digest with Einstein Activity Capture enabled.

### See Who's Planning to Attend (1)

Use the attendee list to determine if the right stakeholders are invited to the meeting and plan to attend. For leads, contacts, and users in your organization, the attendee's entry in the list includes details about their title and role if the Salesforce record includes those details. If your company uses Einstein Activity Capture to sync events, all Salesforce Meetings users see an enhanced attendee list for synced events. For each attendee, the list includes a job level and role indicator based on the attendee's title. From the attendee list, you can

determine who's RSVP'd for the meeting. You can also add record information and create contact or lead records for attendees who don't have a matching Salesforce record.

## Get Quick Updates and Recommendations About the Meeting (2)

If your company uses Einstein Activity Capture to sync events, the event organizer sees helpful notifications and recommended actions about synced events. For example, we remind you if attendees haven't responded, and provide recommended actions such as to follow up or reschedule the meeting. We also alert you about high priority cases and outstanding requests so you can address those issues during your meeting. Check here 48 hours before the start of the meeting for insights about the event. Follow-up actions are shown for 7 days after the event.

After the event ends, the insights change to include helpful links to schedule follow-up meetings, send emails, and notify the people about pending requests.

## Review Related Record Details (3)

See a compact view of the related record, including key fields set on the compact layout. If the related record's object has an active Path defined, you can access the Guidance for Success for each path stage. From the Meeting Digest, mark stages as complete or revert to a previous stage, and add next steps as your conversations take place.

## Learn About Past Interactions (4)

Use the activity timeline to understand how you and other team members have engaged with the prospect or customer. For events synced using Einstein Activity Capture, before the meeting starts the timeline is filtered to only include emails associated with the attendees if:

- The meeting is in the future.
- There are 10 or fewer attendees.
- At least one attendee is outside your organization.

 **Note:** In the filtered view, emails in the activity timeline aren't threaded.

## Associate Documents and Take Notes (5)

If your Salesforce admin has set up and connected Quip, you can review any documents in Quip associated with the event's related records. Depending on your permissions, you can collaborate in existing documents and add new related documents.

### [Meeting Digest Troubleshooting](#)

If you run into problems with Meeting Digest, such as not seeing the Meeting Digest tab or discovering that the meeting information is out of date, review our troubleshooting information.

### SEE ALSO:

[Organize Content with the Quip Associated Documents Component](#)

[Quip in Salesforce](#)

## Meeting Digest Troubleshooting

If you run into problems with Meeting Digest, such as not seeing the Meeting Digest tab or discovering that the meeting information is out of date, review our troubleshooting information.

The Meeting Digest tab isn't available on event records.

- If you haven't customized the event page layout, Salesforce uses the Salesforce Meetings default event layout, which includes Meeting Digest and a column to add other components. If you customized the event layout, use the Lightning App Builder to add Meeting Digest to a tab or wide area on the page.

Synced events show out-of-date information in the Meeting Digest.

- If the meeting owner changes the event date in Outlook or Gmail, Salesforce must resync the event to get the latest meeting information. While the resync is taking place, you see a message indicating that the information in the Meeting Digest tab is out of date. Refresh the page or check back later. When the message clears, you know you have the latest information.
- We do everything we can to keep systems up and running smoothly. However, if there's a Salesforce server connectivity issue, we can't get the latest information about a synced meeting. Check [trust.salesforce.com](https://trust.salesforce.com) for outage statuses, and check the event record later. When the message clears, you know you have the latest meeting information.

Attendees aren't included on some events.

- If an event is manually logged from Outlook or Gmail integrations, the attendee list isn't included in the event record created in Salesforce. You see only the organizer of the event. When you log an event manually, it's considered a snapshot in time. To ensure you aren't seeing old data, the attendee list isn't included in manually logged events.

The activity timeline in Meeting Digest looks different than on the related record.

- The activity timeline for activities synced with Einstein Activity Capture is filtered to show only the emails related to the event or the event attendees. Use the filter options to show more activities.

The organizer in meetings synced from a Teams account isn't correct

- If a Microsoft Teams channel is added to an event synced from Microsoft Teams, the organizer listed in the synced event in Salesforce Meetings changes to the channel owner.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: all editions

## Integration with Microsoft Teams

Integrate Salesforce with Microsoft Teams to bring Salesforce data directly to Teams users on their desktop and mobile devices. Teams participants can mention Salesforce records directly in chats or channels in Teams to provide information about a contact, lead, opportunity, account, or case. Teams channel members with Salesforce access can view more record details without leaving Teams.

- 📌 **Note:** The Salesforce integration with Microsoft Teams isn't intended for transmitting Protected Health Information (PHI).

### [Integration with Microsoft Teams System Requirements](#)

The integration with Teams is available in the Teams desktop app, on the web, and in Teams mobile. Make sure that your system and mobile devices meet the integration requirements.

### [Integration with Microsoft Teams Features](#)

The Salesforce integration with Microsoft Teams lets team members mention and interact with Salesforce records directly in desktop and mobile versions of Microsoft Teams. Review the features available in each environment.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in: **Enterprise, Performance, and Unlimited** Editions

### [Set Up the Salesforce Integration with Microsoft Teams](#)

To integrate Salesforce with Microsoft Teams, complete the required Salesforce setup. Work with your Teams administrator to ensure that Teams is configured correctly so users can access the Salesforce app in Teams.

### [Manage the Salesforce Integration with Teams](#)

As your reps use the integration with Teams, entries about their login attempts and OAuth sessions are made in Salesforce. User mappings are created so users stay logged in to Salesforce from within Teams. Use the Salesforce pages described in this section to view who has accessed the integration and to manage their access.

### [Use the Integration for Microsoft Teams](#)

After the integration is enabled and configured, users with the correct user permissions can access the Salesforce app in Teams. Use the app to mention Salesforce records in conversations, preview and edit records other channel members mention, and pin Salesforce records for easy access in a channel or meeting. Take advantage of Salesforce Meetings from Teams to review event details, meeting insights, and prepare for meetings.

## Integration with Microsoft Teams System Requirements

The integration with Teams is available in the Teams desktop app, on the web, and in Teams mobile. Make sure that your system and mobile devices meet the integration requirements.

 **Note:** The Salesforce integration with Microsoft Teams isn't intended for transmitting Protected Health Information (PHI).

What	Details and Requirements
Browser	If users access Teams through a browser on desktop, review the Microsoft Teams documentation for browser requirements. The Salesforce app doesn't support Internet Explorer 11 and the Teams browser version isn't supported on mobile devices.
Mobile	If users access Teams on their mobile device, we recommend using the latest Teams mobile app available. Review the requirements for the Teams mobile app in the store listing for the app: <ul style="list-style-type: none"> <li>• <a href="#">App Store</a> (Apple devices)</li> <li>• <a href="#">Google Play Store</a> (Android devices)</li> </ul>
Other	<ul style="list-style-type: none"> <li>• The Salesforce integration with Microsoft Teams isn't available in Microsoft Office 365 Government GCC or GCC High environments.</li> <li>• The integration doesn't support custom compact layouts for the Account, Contact, Lead, Opportunity, and Case objects. Use the default, provided compact layout for these objects instead.</li> </ul>

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in: **Enterprise, Performance, and Unlimited** Editions

### SEE ALSO:

[External Link: Limits and specifications for Microsoft Teams](#)

## Integration with Microsoft Teams Features

The Salesforce integration with Microsoft Teams lets team members mention and interact with Salesforce records directly in desktop and mobile versions of Microsoft Teams. Review the features available in each environment.

Feature	Teams on Desktop and in Browsers	Teams on Mobile
Pin a Salesforce record as a tab in Teams channels and meetings	✓	✗
Pin a Meeting Digest as a tab in Teams channels and meetings	✓ (desktop only)	✗
View details on a Salesforce record pinned as a tab, including Details, Activity Timeline, Related Lists, and Chatter	✓ (desktop only)	✓ (opens in Salesforce mobile)
View details on a Meeting Digest pinned as a tab	✓	✗
Edit Salesforce record details	✓	✓ (opens in Salesforce mobile)
Use the Teams chat feed on a Salesforce record pinned as a tab*	✓	✗
Mention a Salesforce record in Teams channels or chat conversations	✓	✓ (Android devices only)
Preview a Salesforce record that was mentioned in a conversation	✓	✓

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in:  
**Enterprise, Performance,**  
and **Unlimited** Editions

\*Microsoft doesn't support Teams chat feeds on pinned tabs in Teams mobile.

## Set Up the Salesforce Integration with Microsoft Teams

To integrate Salesforce with Microsoft Teams, complete the required Salesforce setup. Work with your Teams administrator to ensure that Teams is configured correctly so users can access the Salesforce app in Teams.

### [Considerations for Setting Up the Integration with Teams](#)

Before setting up the Salesforce integration with Teams, review these considerations about the application.

### [Configure the Integration with Microsoft Teams in Salesforce](#)

Turn on the integration with Teams in Salesforce. Then users with the User for Teams Integration permission can access Salesforce data and mention Salesforce records in their Teams conversations.

### [Provision the Integration in Microsoft Teams](#)

After the setup is complete in Salesforce, work with your Microsoft Teams administrator to ensure that the Teams environment is set up correctly. The Salesforce app provides the integration features within the Teams interfaces. The app permission policies maintained in the Microsoft Teams admin center determine which apps users can install. Those policies also determine which apps users can pin to the Teams app bar in their desktop and mobile clients can pin within their teams.

### [Integration for Microsoft Teams Cookies](#)

The integration with Microsoft Teams uses cookies to establish and identify unique user sessions for increased security.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in: **Enterprise, Performance, and Unlimited** Editions

## Considerations for Setting Up the Integration with Teams

Before setting up the Salesforce integration with Teams, review these considerations about the application.

Familiarity with certain characteristics of the integration process can set you up for success.

- The integration features are available in an app in Teams called Salesforce. The Salesforce app is accessible only from Teams apps. There isn't a separate install file for the integration.
- The integration requires Salesforce setup and Teams setup to ensure that users can access to the Salesforce app in Teams.
- When you turn on the integration, this setup happens automatically. Both are required for the integration.
  - A site name `https://*.sfdc.sh` is added in the Cross-Origin Resource Sharing (CORS) list in Salesforce. This site is specific to your org and is required to create the preview cards available in Teams when a Salesforce record is mentioned.
  - The Salesforce integration with Microsoft Teams app is added in the Connected Apps OAuth list in Salesforce setup. The integration honors OAuth settings such as IP restrictions and session durations configured in the policies for the connected app. Learn more about connected apps and their policies in Salesforce Help.
- When a Teams user mentions a record in Teams, the component that displays the record uses that user's Salesforce language and locale settings. Other users see the mentioned record in the language of the person who mentioned the record.
- The integration doesn't support custom compact layouts for the Account, Contact, Lead, Opportunity, and Case objects. Use the default, provided compact layout for these objects instead.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in: **Enterprise, Performance, and Unlimited** Editions

- The Teams integration runs on SCRT2, which is hosted on Hyperforce. Hyperforce documentation applies as listed on the Trust and Compliance page.

## SEE ALSO:

[Configure the Integration with Microsoft Teams in Salesforce](#)

[Provision the Integration in Microsoft Teams](#)

[Trust and Compliance Documentation](#)

## Configure the Integration with Microsoft Teams in Salesforce

Turn on the integration with Teams in Salesforce. Then users with the User for Teams Integration permission can access Salesforce data and mention Salesforce records in their Teams conversations.

- From Salesforce Setup, in the Quick Find box, enter *Teams*, and then select **Teams Integration**.
- Turn on Let users access Teams Integration features.
- Read and acknowledge the agreement.
- Select Assign Permission Set, and assign the User for Teams Integration permission set to users who need access to Salesforce in Teams.
- Select how much Salesforce data to include when a user shares a Salesforce record anywhere in Teams.

Option	Description
<b>Show the object type only</b>	When a rep mentions a record in a conversation, the conversation shows only information about the object type mentioned. Users with Salesforce access can preview more record details in Teams. Users without Salesforce access see the record was mentioned and its type, such as contact, opportunity, lead, account, or case.
	Users see a card with limited information when they mention a record in a channel.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in:

**Enterprise, Performance, and Unlimited** Editions

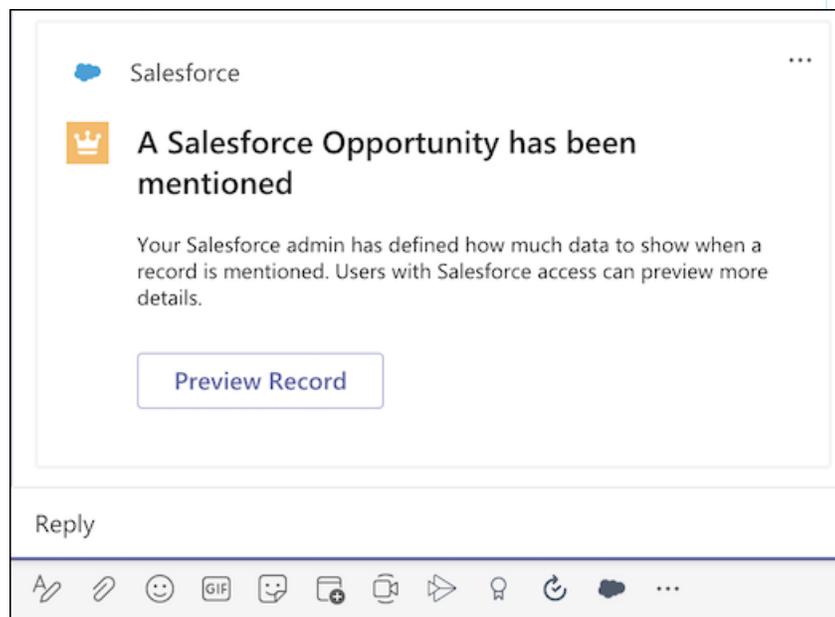
### USER PERMISSIONS

To turn on the app and select the sharing type:

- Assign Permission Sets

To set user permissions:

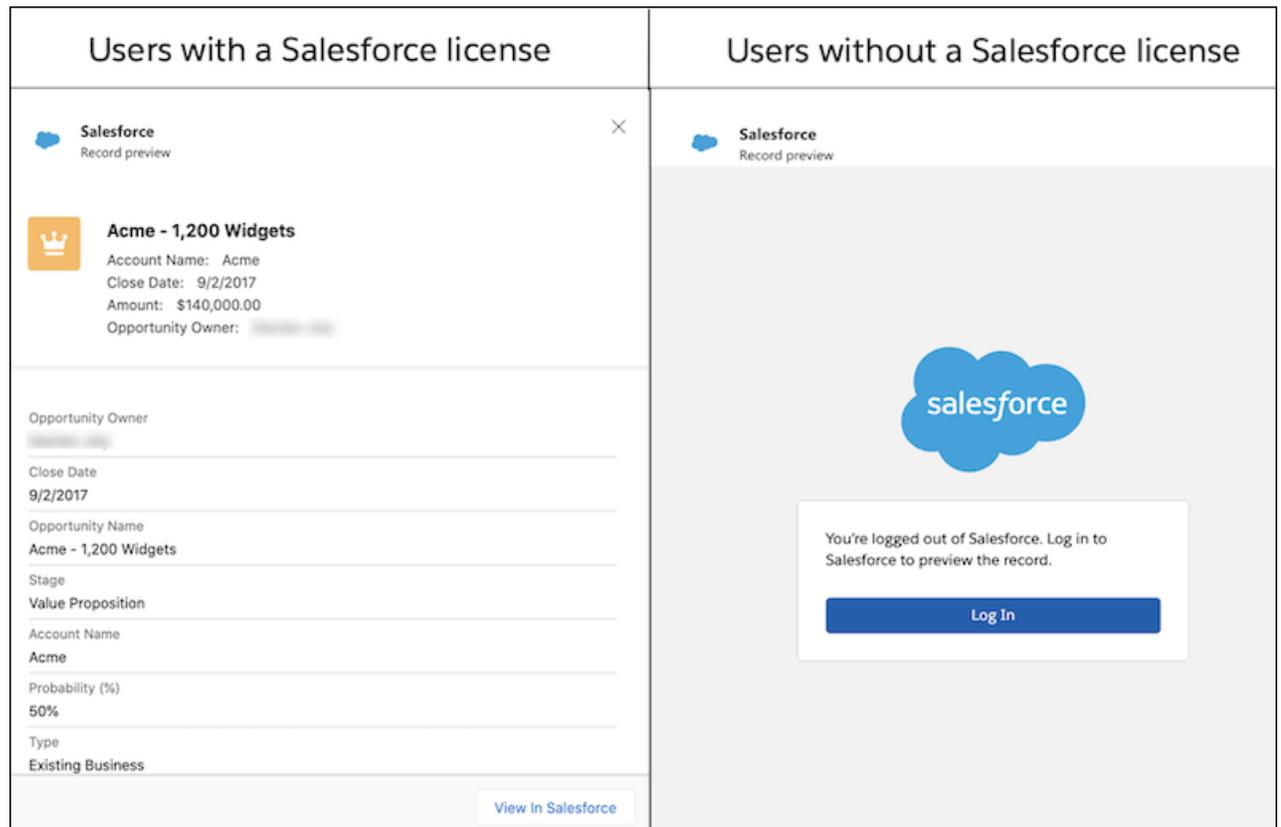
- Assign Permission Sets



**Option** Description

**Show the object type only** When a rep mentions a record in a conversation, the conversation shows only information about the object type mentioned. Users with Salesforce access can preview more record details in Teams. Users without Salesforce access see only that a record was mentioned and its type, such as contact, opportunity, lead, account, or case.

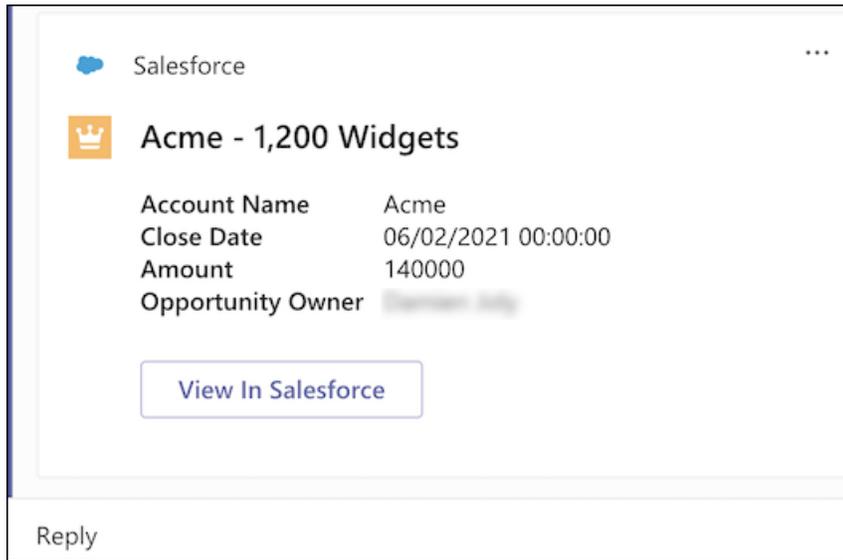
After users select Preview Record, they see different amounts of information based on their Salesforce permissions.



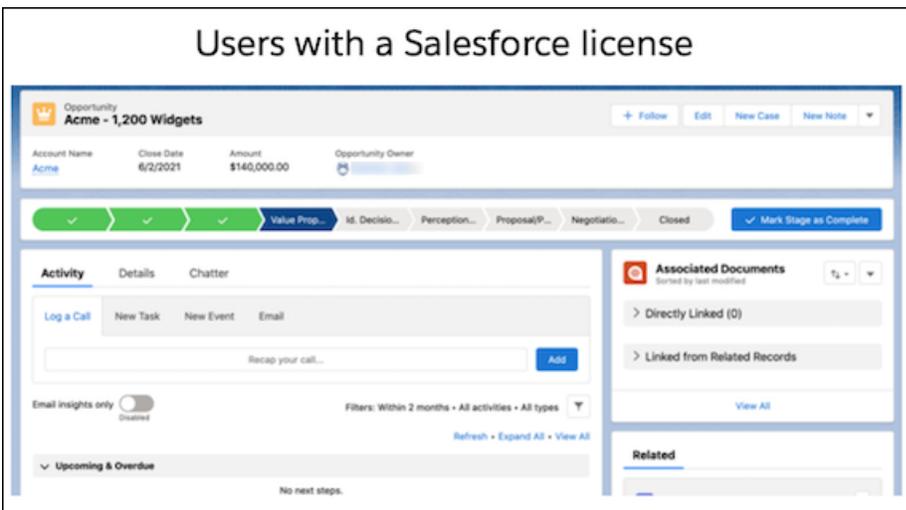
**Show record summary** When a rep mentions a record, the record's compact layout shows in the conversation, even to users who don't have Salesforce access. This option provides the most insight into the record shown and is best for collaboration within Teams. However, ensure that the structure of your compact layouts and the data included are appropriate for all members of a Teams channel to see.

When a user mentions a record, all channel members see an adaptive card with record details. Details shown on the adaptive card are stored in your company's Office 365 Teams storage.

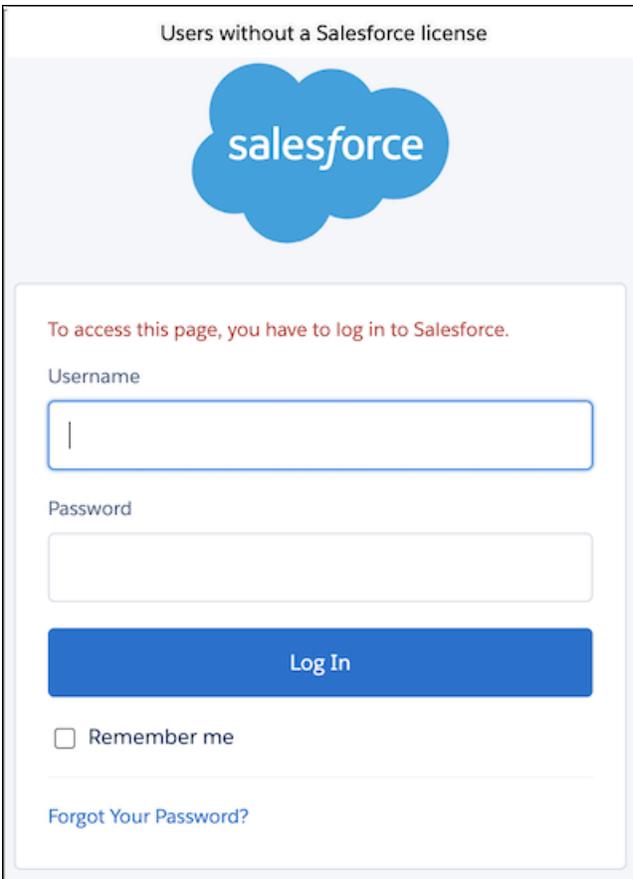
Option	Description
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After users who have a Salesforce license select **View in Salesforce**, they see the record detail page in Salesforce with any information available to them based on their permissions.



After users who don't have a Salesforce license select **View in Salesforce**, they see a login page. They can't view any additional Salesforce records' details without acquiring a login.



The screenshot shows a login interface for users without a Salesforce license. At the top, it says "Users without a Salesforce license" and features the Salesforce logo. Below the logo, a message states: "To access this page, you have to log in to Salesforce." The form includes a "Username" field, a "Password" field, a blue "Log In" button, a "Remember me" checkbox, and a "Forgot Your Password?" link.

Some fields aren't displayed in Teams adaptive cards when the integration is configured for record mentions in a compact layout.

- All empty fields
- Address and rich text fields in the compact layout
- The PhotoUrl field on contacts and leads

6. Work with your Teams administrator to provision the integration in the Teams application.

SEE ALSO:

[Permission Sets](#)

[Provision the Integration in Microsoft Teams](#)

## Provision the Integration in Microsoft Teams

After the setup is complete in Salesforce, work with your Microsoft Teams administrator to ensure that the Teams environment is set up correctly. The Salesforce app provides the integration features within the Teams interfaces. The app permission policies maintained in the Microsoft Teams admin center determine which apps users can install. Those policies also determine which apps users can pin to the Teams app bar in their desktop and mobile clients can pin within their teams.

To ensure that users can access the Salesforce app in Teams, work with your Teams administrator to add the Salesforce app to the Teams permission policies. In the Microsoft Teams admin center, add the Salesforce app to the global app permission policy or any custom policies assigned to users who need the app.

### SEE ALSO:

[External Link: Manage your apps in the Microsoft Teams admin center](#)

## Integration for Microsoft Teams Cookies

The integration with Microsoft Teams uses cookies to establish and identify unique user sessions for increased security.

The integration uses cookies to maintain data access during a session.

The following table describes the cookies that Salesforce collects for the integration. These cookies are required for the app to work correctly.

Cookie Name	Duration	Cookie Type	Description
sessionId	Session	Required	Identifies a user's unique session of the app for login, authentication, and data purposes. Each time a user logs in, a different session ID is created so information is stored and passed between the client and server for that session only.
sessionId-legacy	Session	Required (in older clients and browsers only)	Used if a client or browser doesn't support SameSite=None and Secure attributes together. If those attributes are supported, the integration uses sessionId instead.  Identifies a user's unique session of the app for login, authentication, and data purposes. Each time a user logs in, a different

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in:  
**Enterprise, Performance,**  
and **Unlimited** Editions

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in:  
**Enterprise, Performance,**  
and **Unlimited** Editions

Cookie Name	Duration	Cookie Type	Description
			session ID is created so information is stored and passed between the client and server for that session only.

## Manage the Salesforce Integration with Teams

As your reps use the integration with Teams, entries about their login attempts and OAuth sessions are made in Salesforce. User mappings are created so users stay logged in to Salesforce from within Teams. Use the Salesforce pages described in this section to view who has accessed the integration and to manage their access.

### [View Who Accessed the Integration with Teams](#)

Each time a user logs in to Salesforce from Microsoft Teams, their login attempt is added to the Login History page in Salesforce setup. Use the login history to monitor all login attempts from Teams to Salesforce.

### [Manage User Access to the Integration with Teams](#)

The first time a user logs in to Salesforce from Teams, they're prompted to accept access levels that the integration requests. These levels are required to send data securely between Salesforce and Teams. Accepting the levels creates a user mapping that you can manage in the Connected Apps OAuth Usage page in Salesforce setup.

### [Troubleshoot Access to Salesforce from Microsoft Teams](#)

Logging in to and authenticating with Salesforce requires that the integration with Teams is on and that users have the correct permissions. Review the potential reasons why Teams users can't log in to Salesforce from within Teams.

#### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in:  
**Enterprise, Performance,**  
and **Unlimited** Editions

## View Who Accessed the Integration with Teams

Each time a user logs in to Salesforce from Microsoft Teams, their login attempt is added to the Login History page in Salesforce setup. Use the login history to monitor all login attempts from Teams to Salesforce.

SEE ALSO:

[Monitor Login History](#)

#### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in:  
**Enterprise, Performance,**  
and **Unlimited** Editions

## Manage User Access to the Integration with Teams

The first time a user logs in to Salesforce from Teams, they're prompted to accept access levels that the integration requests. These levels are required to send data securely between Salesforce and Teams. Accepting the levels creates a user mapping that you can manage in the Connected Apps OAuth Usage page in Salesforce setup.

The user mapping created when a user logs in means that a user can avoid logging in each time they interact with Salesforce. The integration respects the application timeout settings in Salesforce and honors the other OAuth settings for the connected app. If a user's Salesforce session expires, they're also logged out of Salesforce within Teams. When a user logs out, the user mapping is removed. The user is prompted to log in again the next time they access the app.

### SEE ALSO:

[Manage Access to a Connected App](#)

## Troubleshoot Access to Salesforce from Microsoft Teams

Logging in to and authenticating with Salesforce requires that the integration with Teams is on and that users have the correct permissions. Review the potential reasons why Teams users can't log in to Salesforce from within Teams.

If a user receives an error logging in to Salesforce, verify that:

- Your org is running Enterprise, Performance, or Unlimited Editions, and that the Salesforce integration with Teams is enabled.
- The Teams user also has a Salesforce user account. Depending on your Teams policy settings, Teams users can install the Salesforce app on their own. However, users need a Salesforce user account and login credentials to preview and mention records.
- The user has the User for Teams Integration permission set assigned in Salesforce, which gives them access to the Salesforce features in Teams.
- The `http://*.salesforce-scrt.com` site is listed on the cross-origin resource sharing (CORS) page in Salesforce setup. The listing specific to your org is added automatically when you enable the integration. If the listing is deleted but the integration is still enabled, users receive an error in Teams when trying to log in to Salesforce.
- Verify that the Salesforce integration with Microsoft Teams app is listed in the Connected App in Salesforce setup and that access isn't blocked. If the app is deleted or blocked but integration is still enabled, users receive an error in Teams. The integration honors OAuth settings such as IP restrictions and session durations configured for the connected.

If a Teams user doesn't see the Salesforce app as an option in Teams, work with the Teams administrator to verify that the app permission policies in Teams are set to allow access to the Salesforce app.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in:  
**Enterprise, Performance, and Unlimited Editions**

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in:  
**Enterprise, Performance, and Unlimited Editions**

## Use the Integration for Microsoft Teams

After the integration is enabled and configured, users with the correct user permissions can access the Salesforce app in Teams. Use the app to mention Salesforce records in conversations, preview and edit records other channel members mention, and pin Salesforce records for easy access in a channel or meeting. Take advantage of Salesforce Meetings from Teams to review event details, meeting insights, and prepare for meetings.

### [Get the Salesforce App for Microsoft Teams](#)

To mention Salesforce records in Microsoft Teams, add the Salesforce app to the messaging area in Teams.

### [Add Salesforce Records as Custom Tabs in Microsoft Teams Channels and Meetings](#)

Conversations in Microsoft Teams are fast-paced and grow as a feed. So mentions of Salesforce records can be lost in the details. For quick access to a record's details, add a Salesforce record as a tab in a Teams channel or meeting. Members can add collaboration details in the record tab in desktop and web versions of Teams. The collaboration details from the tab are added to the channel or meeting feed.

### [Mention Salesforce Records in Microsoft Teams Channels and Chats](#)

To provide information about a Salesforce record in Microsoft Teams, mention the Salesforce record that applies to the conversation. Other team members can review the record details without leaving Teams.

### [View and Edit Salesforce Records in Microsoft Teams](#)

When a Salesforce record is added to a tab in Microsoft Teams, you can access the same record information that you see in Salesforce. You can make edits to record details, view the record activity, interact with related records, and post to Chatter for the record. Your changes and additions are saved to the record in Salesforce. The record information updates in the tab as changes are made in Salesforce. If you're in Salesforce or in Teams, you're up to date on the latest record information.

### [Log Out of the Salesforce App in Teams](#)

To disconnect your Salesforce account from Microsoft Teams, log out of the Salesforce App. You can't share or view Salesforce records while logged out.

#### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in:  
**Enterprise, Performance,**  
and **Unlimited** Editions

## Get the Salesforce App for Microsoft Teams

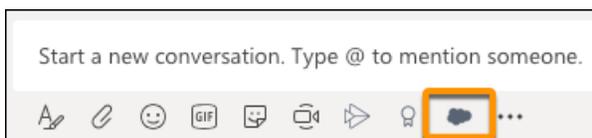
To mention Salesforce records in Microsoft Teams, add the Salesforce app to the messaging area in Teams.

1. From the desktop or web version of Microsoft Teams, select the **More Options** menu located below the box you use to type messages.

Start a new conversation. Type @ to mention someone.



2. Search for Salesforce, and then add the app. After you do, a Salesforce icon is available in the app toolbar.



#### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in:  
**Enterprise, Performance,**  
and **Unlimited** Editions

#### USER PERMISSIONS

Use the integration for Teams

- User for Teams Integration

Your Teams administrator maintains the policies for the apps available to you and the apps you can pin to the Teams messaging bar. If you can't find the Salesforce app, contact your Teams administrator for help.

 **Tip:** After you add the app to the desktop or web version of Teams, the app is available in Teams on your mobile device.

## Add Salesforce Records as Custom Tabs in Microsoft Teams Channels and Meetings

Conversations in Microsoft Teams are fast-paced and grow as a feed. So mentions of Salesforce records can be lost in the details. For quick access to a record's details, add a Salesforce record as a tab in a Teams channel or meeting. Members can add collaboration details in the record tab in desktop and web versions of Teams. The collaboration details from the tab are added to the channel or meeting feed.

 **Note:** Adding Salesforce records as custom tabs is only available in the desktop and web versions of Teams. However, the custom tabs are viewable in mobile.

1. At the top of a Teams channel or meeting, click the + icon next the other tabs.
2. Search for the Salesforce app.
3. Search for and select the Salesforce record you want to add as a tab.

 **Tip:** To include a visual queue to other people in the conversation that you posted the tab, select **Post to the channel about this tab**. Team members can click the mention to launch the tab from the conversation.

4. Save your selections.

The tab is available to all members of the channel or meeting. Depending on Salesforce admin settings for your org, the tab name is the record type, such as Salesforce Opportunity, or the record's name.

## Mention Salesforce Records in Microsoft Teams Channels and Chats

To provide information about a Salesforce record in Microsoft Teams, mention the Salesforce record that applies to the conversation. Other team members can review the record details without leaving Teams.

1. In a Teams channel or chat, select the  icon to open the Salesforce app.  
If you have many apps pinned for messaging, click or tap the more options menu, and then search for Salesforce. If you still can't find the app, contact your Teams administrator for help.
2. Search for the record you want to mention, and select **Mention Record**.
3. Add any additional text to your message, and press Enter to add it to the conversation.

Depending on the Salesforce settings, users see information about the record or a message that a Salesforce record was shared with the option to preview the record.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in:  
**Enterprise, Performance,**  
and **Unlimited** Editions

### USER PERMISSIONS

Use the integration for Teams

- User for Teams Integration

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in:  
**Enterprise, Performance,**  
and **Unlimited** Editions

### USER PERMISSIONS

Use the integration for Teams

- User for Teams Integration

## View and Edit Salesforce Records in Microsoft Teams

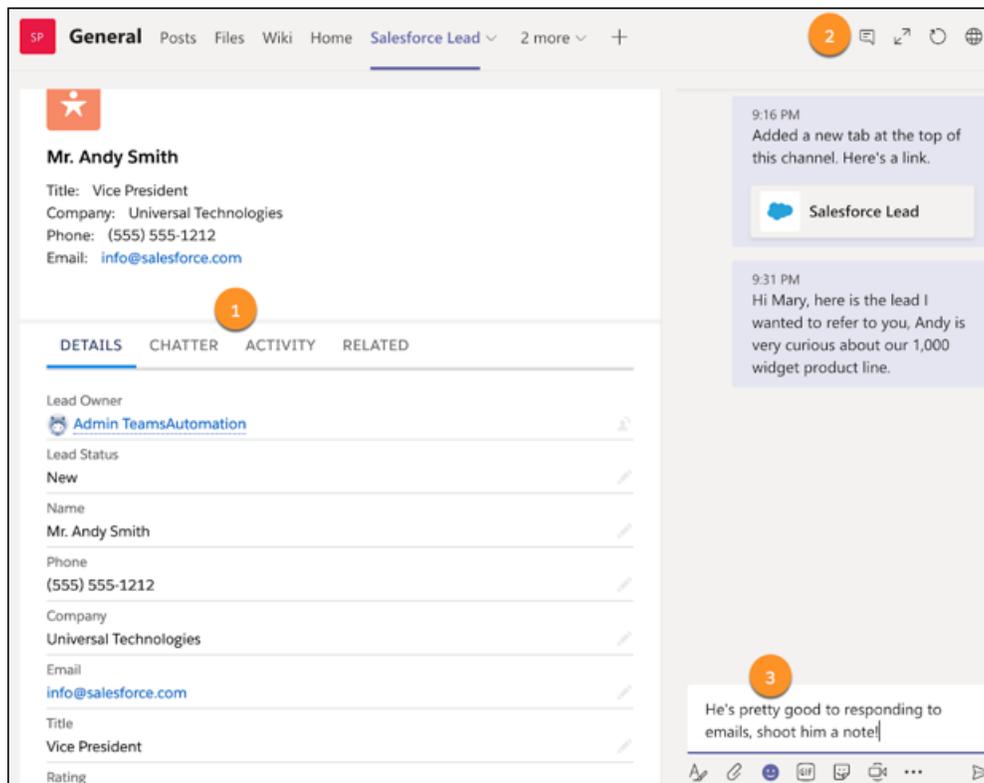
When a Salesforce record is added to a tab in Microsoft Teams, you can access the same record information that you see in Salesforce. You can make edits to record details, view the record activity, interact with related records, and post to Chatter for the record. Your changes and additions are saved to the record in Salesforce. The record information updates in the tab as changes are made in Salesforce. If you're in Salesforce or in Teams, you're up to date on the latest record information.

From Teams on desktop and the web, (1) access the same record details that you do in Salesforce, including custom fields. Use the tabs to view and edit details, keep up with Chatter posts, view the activity on the record, and view the related records. (2) Have a conversation about the record directly in the tab. (3) Any messages you post in the tab are also added to the channel feed.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in:  
**Enterprise, Performance,**  
and **Unlimited** Editions

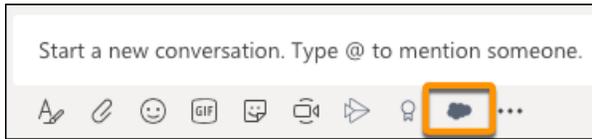


 **Note:** If you're using the mobile versions of Teams, you're taken to the Salesforce mobile app to preview details from Salesforce records in custom tabs.

## Log Out of the Salesforce App in Teams

To disconnect your Salesforce account from Microsoft Teams, log out of the Salesforce App. You can't share or view Salesforce records while logged out.

1. From any version of Microsoft Teams, right-click the Salesforce icon located below the box you use to type messages in chat or in channels.

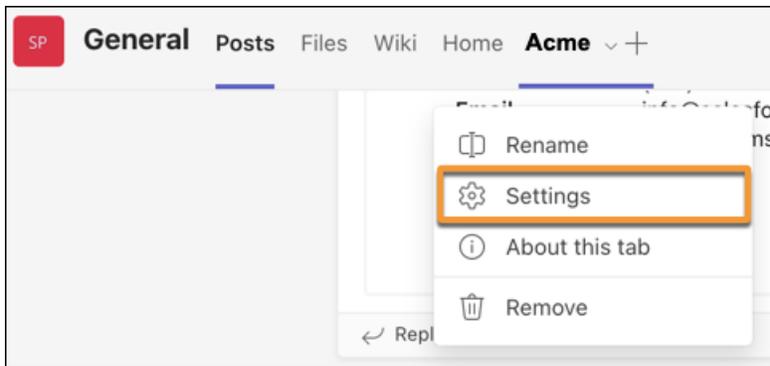


Your Teams administrator maintains the policies for the apps available to you and the apps you can pin to the Teams messaging bar. If you can't find the Salesforce app, contact your Teams administrator for help.

2. Select **Settings**, and then click **Logout**.

You can log in to the Salesforce app to share and view records again.

- 💡 **Tip:** You can also log out from custom record tabs. From the top of any custom Salesforce record tab in Microsoft Teams, click the dropdown menu, and then select **Settings**.



### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in: **Enterprise, Performance, and Unlimited** Editions

### USER PERMISSIONS

Use the integration for Teams

- User for Teams Integration

## Email and Calendar Integrations

You spend tons of time working prospects from your email and scheduling appointments from your calendar. After Salesforce admins set up these integration products, you can get your Salesforce work done directly from your Microsoft or Google applications such as Outlook, Gmail, and Google Calendar.



 <p><b>Get to Know the Tools</b></p> <p><a href="#">Trailhead: Email and Calendar Integrations</a></p> <p><a href="#">Explore Email and Calendar Integration Products</a></p> <p><a href="#">Video: Introduction to Email and Calendar Integration Tools (6:35)</a></p> <p><a href="#">Video: Connecting to Salesforce in Gmail (3:21)</a></p>	 <p><b>Migrate from Legacy Products</b></p> <p><a href="#">Salesforce for Outlook</a></p> <p><a href="#">Salesforce for Outlook (Retiring)</a></p> <p><a href="#">Salesforce for Outlook Retirement</a></p> <p><a href="#">Move from Salesforce for Outlook (Retiring) to the Next-Generation Products</a></p>	 <p><b>Learn About the Integrations</b></p> <p><a href="#">Outlook</a></p> <p><a href="#">Video: See the Outlook Integration in Action (3:26)</a></p> <p><a href="#">Trailhead: Outlook Integration</a></p> <p><a href="#">Gmail</a></p> <p><a href="#">Video: See the Gmail Integration in Action (3:20)</a></p> <p><a href="#">Trailhead: Gmail and Google Calendar Integration</a></p>
 <p><b>Plan Your Rollout</b></p> <p><a href="#">Outlook</a></p> <p><a href="#">Outlook Integration System Requirements</a></p> <p><a href="#">Roles Required to Set Up the Outlook Integration</a></p> <p><a href="#">Microsoft Exchange Server Setup for the Outlook Integration</a></p> <p><a href="#">Gmail</a></p> <p><a href="#">Gmail Integration System Requirements</a></p> <p><a href="#">Outlook and Gmail</a></p> <p><a href="#">Security Guide: Salesforce Email Integration</a></p>	 <p><b>Set Up and Use the Integration</b></p> <p><a href="#">Outlook</a></p> <p><a href="#">Turn On the Outlook Integration in Salesforce</a></p> <p><a href="#">Deploy the Outlook Integration to Users</a></p> <p><a href="#">Gmail</a></p> <p><a href="#">Turn On the Gmail Integration in Salesforce</a></p> <p><a href="#">Get the Salesforce Extension for Chrome on page 306</a></p> <p><a href="#">Outlook and Gmail</a></p> <p><a href="#">Use the Outlook and Gmail Integrations</a></p> <p><a href="#">Extend the Outlook and Gmail Integrations with Inbox</a></p>	 <p><b>Learn About Einstein Activity Capture</b></p> <p><a href="#">What Does Einstein Activity Capture Do?</a></p> <p><a href="#">Video: See Einstein Activity Capture in Action (6:27)</a></p> <p><a href="#">Emails and Einstein Activity Capture on page 420</a></p> <p><a href="#">Events and Einstein Activity Capture on page 424</a></p> <p><a href="#">Contacts and Einstein Activity Capture on page 444</a></p>
 <p><b>Plan Your Rollout</b></p> <p><a href="#">Einstein Activity Capture System Requirements on page 335</a></p> <p><a href="#">Give Users Access to Einstein Activity Capture</a></p>	 <p><b>Set Up and Use Einstein Activity Capture</b></p> <p><a href="#">Set Up Einstein Activity Capture on page 349</a></p> <p><a href="#">Use Einstein Activity Capture on page 390</a></p> <p><a href="#">Troubleshoot Einstein Activity Capture Setup Issues on page 401</a></p> <p><a href="#">Turn On Einstein Email Insights on page 386</a></p>	 <p><b>Analyze Your Activity Data</b></p> <p><a href="#">Video: Introduction to Activity Metrics (2:45)</a></p> <p><a href="#">Use Activity Metrics</a></p> <p><a href="#">Use the Activities Dashboard on page 461</a></p> <p><a href="#">Create Activities Reports on Contacts and Events</a></p>

[Security Guide: Einstein Activity Capture Considerations Before Setting Up Einstein Activity Capture](#) on page 339

[Add Recommended Connections to Lightning Pages](#)

### [Explore Email and Calendar Integration Products](#)

Salesforce provides several tools that integrate with Microsoft or Google email and calendar applications. If you're using Salesforce for Outlook (Retiring) or Lightning Sync, prepare for the move to a replacement product.

#### [Outlook and Gmail Integration](#)

Sales reps spend a good portion of their day working in their email, and switching back to Salesforce to get customer, prospect, and opportunity information. Isn't it time to use email and Salesforce together? The Salesforce integration with Outlook® and Gmail™ helps your reps manage their sales more efficiently. Your reps can view, edit, and add Salesforce records directly from their email, and relate emails and events to Salesforce records.

#### [Einstein Activity Capture](#)

Let Einstein help keep data between Salesforce and your email and calendar applications up to date. Then you can get back to more important things, like selling.

#### [Salesforce Inbox](#)

Inbox features increases sales reps' productivity on every email message, whether they're on the go or at their desk.

#### [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.

#### [Email Application Publisher Layouts](#)

Salesforce admins can set up Outlook integration and Gmail integration users to create accounts, cases, leads, opportunities, and custom objects directly from their email applications. Reps create records using actions menus, which you can 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](#)

Einstein Activity Capture, Lightning Sync, Salesforce for Outlook (Retiring), and Email to Salesforce let you integrate the work you do from your email and calendar applications with Salesforce. Microsoft or Google items that aren't automatically associated with Salesforce records appear in My Unresolved Items. Sales reps can review the unresolved items and associate them manually.

#### [Salesforce for Outlook \(Retiring\)](#)

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.

#### [Extended Mail Merge](#)

With Extended Mail Merge, you can merge data from your Salesforce accounts, contacts, leads, cases, opportunities, and custom objects into Microsoft Word documents. The documents can be made into form letters, envelopes, labels, or any Word document that you want to personalize for recipients. You can generate documents one at a time, or generate documents in bulk using mass mail merge.

## Explore Email and Calendar Integration Products

Salesforce provides several tools that integrate with Microsoft or Google email and calendar applications. If you're using Salesforce for Outlook (Retiring) or Lightning Sync, prepare for the move to a replacement product.

## Get to Know Our Integration Options

### Outlook or Gmail Integration

Use the Outlook or Gmail integration to access Salesforce features and create Salesforce records in your email and calendar applications. A side panel shows Salesforce records that match an address in open emails or events. Sales reps can also manually relate emails, events, and contacts to Salesforce records without leaving their email or calendar application. Save your reps time and maintain consistent messaging for customers by using [Lightning or Salesforce Classic email templates](#) with the integration. Learn more about [Outlook and Gmail integration features](#).

### Einstein Activity Capture

Einstein Activity Capture works with Microsoft and Gmail to keep data between Salesforce and your email and calendar applications up to date. Emails and events that sales reps send and receive are automatically added to the activity timeline of related Salesforce records. Events and contacts are automatically kept in sync between connected accounts and Salesforce. For details, see [What Does Einstein Activity Capture Do?](#)

### Inbox

You can add Inbox, a productivity-boosting tool, to the Outlook or Gmail integration. Give reps access to features that let them insert availability for meetings, track when emails are opened, and schedule when to send emails. An Inbox license unlocks Inbox features in the Outlook integration, Gmail integration, and Lightning Experience. See the [features available in each environment](#) and explore ways to [extend the Outlook or Gmail integration with Inbox](#).

### Send Email Through Gmail or Office 365

If you don't have Einstein Activity Capture or Inbox, your reps can still send emails from Salesforce through connected Gmail or Microsoft accounts. With Send Email Through Gmail or Office 365, users can write their emails in Lightning Experience and send them through their connected account. Emails sent from Salesforce look like they were sent from Gmail or Office 365, and they're marked as sent in your reps' email application. See [Considerations for Send Email Through Gmail™ or Office 365™](#) to make sure that Send Email Through Gmail or Office 365 is right for you.

## Replace Salesforce for Outlook (Retiring) or Lightning Sync

If you're using Salesforce for Outlook (Retiring) or Lightning Sync, now is a great time to consider moving to next-generation products. In Summer '21, the Salesforce for Outlook panel action menu was retired. In the Winter '21 release, [Lightning Sync became unavailable](#) to new Salesforce customers. Salesforce for Outlook is being retired. Find out how you can replace your reps' favorite features with our next-generation products.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

### Contact and event sync

Einstein Activity Capture syncs contacts and events between Microsoft or Google applications and Salesforce. Plus, it offers new productivity-boosting features for sales reps. Compare [features and application support](#) for Lightning Sync and Einstein Activity Capture.

### Side panel

Sales reps can use the [side panel in Outlook or Gmail integration](#) to work with Salesforce records and features in their email and calendar applications. If you purchase Inbox licenses, sales reps can access even more Salesforce productivity features using the side panel.

We're here to help you and your sales reps prepare for a smooth transition. For more details on replacing Salesforce for Outlook, check out our migration guide, [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#). Is your team migrating from Lightning Sync? [Get Ready to Move from Lightning Sync to Einstein Activity Capture](#).

SEE ALSO:

[Outlook and Gmail Integration](#)

[Einstein Activity Capture](#)

[Salesforce Inbox](#)

[Send Through Gmail or Office 365](#)

## Compare Einstein Activity Capture and Lightning Sync

Both Einstein Activity Capture and Lightning Sync help your sales reps stay productive by syncing your Microsoft® or Google contacts and events with Salesforce. Compare features and application support to see which product is best for your company.

**Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

### Integrate Salesforce and Microsoft Applications

Feature or Requirement	Einstein Activity Capture	Lightning Sync
Supported servers	<ul style="list-style-type: none"> <li>Microsoft Exchange Online with Office 365®</li> <li>Microsoft Exchange Server 2019, 2016, or 2013</li> <li>Exchange hybrid deployments (supports <a href="#">capture functionality</a> only)</li> </ul>	<ul style="list-style-type: none"> <li>Microsoft Exchange Online with Office 365®</li> <li>Microsoft Exchange Server 2019, 2016, or 2013</li> </ul>
Connection credentials	<p>Exchange 2019, 2016, and 2013: You can use a user-level connection or provide credentials to a service account in Salesforce.</p> <p>Exchange Online with Office 365: You can choose a user-level connection, an org-level connection, or a service account.</p> <p>See <a href="#">Connection Methods for Microsoft Exchange</a>.</p>	<p>Exchange 2019, 2016, and 2013: Your Microsoft admin can provide credentials to a service account in Salesforce that gives Salesforce impersonation access user-by-user.</p> <p>Exchange Online with Office 365: You can grant an org-level connection by giving Salesforce access to your Exchange tenant using OAuth 2.0. A Salesforce admin or a Microsoft admin can provide tenant credentials to a Microsoft site that admins are directed to from Salesforce.</p> <p>See <a href="#">Choose and Configure a Method for Connecting to Microsoft® Exchange</a> on page 556.</p>
Roles required to complete setup	A setup flow guides Salesforce admins through creating a configuration and defining settings. For some connection methods, Salesforce admins	Exchange 2019, 2016, and 2013: Microsoft admins are required to complete an advanced setup from your server environment. Next,

#### EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter, Professional, Enterprise, Performance,** and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

Available with Inbox in Sales Cloud, which is included in **Starter, Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

Feature or Requirement	Einstein Activity Capture	Lightning Sync
	<p>work with their Microsoft admins. For the user-level connection method and users who have access to Inbox, users are responsible for connecting a Microsoft account to Salesforce. See <a href="#">Admin Setup for Einstein Activity Capture</a>.</p>	<p>Salesforce admins can enable features and roll out Lightning Sync to users from Salesforce Setup.</p> <p>Exchange Online with Office 365: Salesforce admins can complete setup from Salesforce with some minor guidance from Microsoft admins.</p> <p>See <a href="#">See the Big Picture for Setting Up Lightning Sync for Microsoft® Exchange</a>.</p>
Supported Salesforce user interfaces	<ul style="list-style-type: none"> <li>• Lightning Experience</li> <li>• Mobile supported for sync functionality only</li> </ul>	<ul style="list-style-type: none"> <li>• Lightning Experience</li> <li>• Salesforce Classic*</li> <li>• All versions of the Salesforce mobile app</li> </ul> <p>*Some features not available in Salesforce Classic.</p>
Supported licenses	<p>Einstein Activity Capture Standard is available to up to 100 users on the Standard Salesforce license with Sales Cloud purchase. To set up more than 100 users, one of the following add-on licenses is required.</p> <ul style="list-style-type: none"> <li>• Sales Cloud Einstein</li> <li>• Inbox</li> <li>• Sales Engagement</li> <li>• Revenue Intelligence</li> </ul> <p>Users with Performance and Unlimited editions can access Einstein Activity Capture features without an add-on license.</p>	<p>With the purchase of Sales Cloud, Service Cloud, or Lightning Platform, Lightning Sync supports users working from these Standard licenses only.</p> <p>*Does not include Lightning Platform Starter or Lightning Platform Plus</p> <p>**Contact sync isn't supported for Lightning Sync customers working from the user license Lightning Platform - One App. Lightning Platform - One App doesn't include the Contacts object.</p>
Supported editions	<ul style="list-style-type: none"> <li>• Essentials</li> <li>• Professional</li> <li>• Enterprise</li> <li>• Performance</li> <li>• Unlimited</li> </ul>	<ul style="list-style-type: none"> <li>• Professional</li> <li>• Enterprise</li> <li>• Performance</li> <li>• Unlimited</li> <li>• Developer</li> </ul>
Sync	<p>Syncs contacts and events, including:</p> <ul style="list-style-type: none"> <li>• Event series (Lightning Experience and Salesforce app only)</li> <li>• Private events</li> <li>• Deleted events</li> </ul>	<p>Syncs contacts and events, including:</p> <ul style="list-style-type: none"> <li>• Event series (Lightning Experience and Salesforce app only)</li> <li>• Private events</li> <li>• Deleted events</li> </ul>

Feature or Requirement	Einstein Activity Capture	Lightning Sync
	Doesn't automatically remove contacts that are deleted from the other calendar application.	Doesn't automatically remove contacts that are deleted from the other calendar application.
Sync directions	<ul style="list-style-type: none"> <li>• Exchange to Salesforce</li> <li>• Salesforce to Exchange</li> <li>• Both Ways</li> </ul>	<ul style="list-style-type: none"> <li>• Exchange to Salesforce</li> <li>• Salesforce to Exchange</li> <li>• Both Ways</li> </ul>
Configuration assignments	<p>Salesforce admins can assign users to sync configurations by individual user and by user profile.</p> <p>Developers can assign large groups of users to sync configurations using the API.</p>	Salesforce admins can assign users to sync configurations by individual user and by user profile.
Capture	<p>Any emails and events that sales reps send and receive from Microsoft applications are automatically associated with related account, contact, contract, lead, opportunity, and quote records in Salesforce.</p> <p>Admins can select a setting that relates synced events to Salesforce records so that those events are available for reporting and other Salesforce platform capabilities. <a href="#">Learn More</a></p>	<p>No capture functionality is available.</p> <p>Admins can select a setting that relates synced events to Salesforce records so that those events are available for reporting and other Salesforce platform capabilities. <a href="#">Learn More</a>.</p>
Reporting	For synced events and contacts, standard Salesforce reporting is available. For captured email and contacts, standard reporting isn't available. Use the <a href="#">Activities dashboard</a> or <a href="#">Activity Metrics</a> .	Standard Salesforce reporting is available.
Storage	Synced data is stored in Salesforce. Captured data is stored using a public cloud provider. See <a href="#">Einstein Activity Capture Security Guide</a> .	Synced data is stored in Salesforce. See <a href="#">Lightning Sync Design and Security</a> .
Einstein Email Insights	Surfaces contextual insights on users' emails to help prioritize urgent items. With an add-on license, you can create custom email insights for users. See <a href="#">What Is Einstein Activity Capture Standard?</a>	Not available.
Recommended connections on contacts and leads	With an add-on license, you can help users build relationships with customers using the recommended connections feature. See <a href="#">What Is Einstein Activity Capture Standard?</a>	Not available.

## Integrate Salesforce and Google Applications

Feature or Requirement	Einstein Activity Capture	Lightning Sync
Supported servers	Basic, Business, and Enterprise editions of Google Workspace.	Basic, Business, and Enterprise editions of Google Workspace.
Connection credentials	You can choose a user-level connection or a service account. See <a href="#">Connection Methods for Google</a> .	Google admins create a private key to your company's G Suite account and upload it to Salesforce. No user-level credentials required.
Roles required to complete setup	A setup flow guides Salesforce admins through creating a configuration and defining settings. Then users complete a few steps to connect their accounts. See <a href="#">Admin Setup for Einstein Activity Capture</a> .	Google admins are required to complete an advanced setup from their Google API Console. Next, Salesforce admins can enable features and roll out Lightning Sync to users from Salesforce Setup. See <a href="#">See the Big Picture for Setting Up Lightning Sync for Google</a> .
Supported Salesforce user interfaces	<ul style="list-style-type: none"> <li>Lightning Experience</li> <li>Mobile supported for sync functionality only</li> </ul>	<ul style="list-style-type: none"> <li>Lightning Experience</li> <li>Salesforce Classic</li> <li>Salesforce mobile app</li> </ul>
Supported licenses	Einstein Activity Capture Standard is available to up to 100 users on the Standard Salesforce license with Sales Cloud purchase. To set up more than 100 users, one of the following add-on licenses is required. <ul style="list-style-type: none"> <li>Sales Cloud Einstein</li> <li>Inbox</li> <li>Sales Engagement</li> <li>Revenue Intelligence</li> </ul> Users with Performance and Unlimited editions can access Einstein Activity Capture features without an add-on license.	With the purchase of Sales Cloud, Service Cloud, or Lightning Platform, Lightning Sync supports users working from these Standard licenses only. <ul style="list-style-type: none"> <li>Salesforce</li> <li>Lightning Platform Salesforce Platform*</li> <li>Lightning Platform - One App**</li> <li>Lightning Platform App Subscription</li> </ul> *Does not include Lightning Platform Starter or Lightning Platform Plus **Contact sync isn't supported for Lightning Sync customers working from the user license Lightning Platform - One App. Lightning Platform - One App doesn't include the Contacts object.
Supported editions	<ul style="list-style-type: none"> <li>Essentials</li> <li>Professional</li> <li>Enterprise</li> <li>Performance</li> <li>Unlimited</li> </ul>	<ul style="list-style-type: none"> <li>Professional</li> <li>Enterprise</li> <li>Performance</li> <li>Unlimited</li> <li>Developer</li> </ul>

Feature or Requirement	Einstein Activity Capture	Lightning Sync
Sync	<p>Syncs contacts and events, including:</p> <ul style="list-style-type: none"> <li>• Private events</li> <li>• Deleted events</li> </ul> <p>Doesn't automatically remove contacts that are deleted from the other calendar application.</p>	<p>Syncs contacts and events, including:</p> <ul style="list-style-type: none"> <li>• Private events</li> <li>• Deleted events</li> </ul> <p>Doesn't automatically remove contacts that are deleted from the other calendar application.</p>
Sync directions	<ul style="list-style-type: none"> <li>• Google to Salesforce</li> <li>• Salesforce to Google</li> <li>• Both Ways</li> </ul>	<ul style="list-style-type: none"> <li>• Google to Salesforce</li> <li>• Salesforce to Google</li> <li>• Both Ways</li> </ul>
Configuration assignments	<p>Salesforce admins can assign users to sync configurations by individual user and by user profile.</p> <p>Developers can assign large groups of users to sync configurations using the API.</p>	<p>Salesforce admins can assign users to sync configurations by individual user and by user profile.</p>
Capture	<p>Any emails and events that sales reps send and receive from Google applications are automatically associated with related account, contact, contract, lead, opportunity, and quote records in Salesforce.</p> <p>Admins can select a setting that relates synced events to Salesforce records so that those events are available in reporting and other Salesforce platform capabilities.</p>	<p>No capture functionality is available.</p> <p>Admins can select a setting that relates synced events to Salesforce records so that those events are available in reporting and other Salesforce platform capabilities. <a href="#">Learn More.</a></p>
Reporting	<p>For synced events and contacts, standard Salesforce reporting is available. For captured email and contacts, standard reporting isn't available. Use the <a href="#">Activities dashboard</a> or <a href="#">Activity Metrics</a>.</p>	<p>Standard Salesforce reporting is available.</p>
Storage	<p>Synced data is stored in Salesforce. Captured data is stored using a public cloud provider. See <a href="#">Einstein Activity Capture Security Guide</a>.</p>	<p>Synced data is stored in Salesforce. See <a href="#">Lightning Sync Design and Security</a>.</p>
Einstein Email Insights	<p>Surfaces contextual insights on users' emails to help prioritize urgent items. With an add-on license, you can create custom email insights for users. See <a href="#">What Is Einstein Activity Capture Standard?</a></p>	<p>Not available.</p>

Feature or Requirement	Einstein Activity Capture	Lightning Sync
Recommended connections on contacts and leads	With an add-on license, you can help users build relationships with customers using the recommended connections feature. See <a href="#">What Is Einstein Activity Capture Standard?</a>	Not available.

## SEE ALSO:

[Why Move from Lightning Sync to Einstein Activity Capture?](#)

[Einstein Activity Capture](#)

[Einstein Activity Capture Security Guide](#)

[Lightning Sync](#)

[Lightning Sync Security](#)

## Outlook and Gmail Integration

Sales reps spend a good portion of their day working in their email, and switching back to Salesforce to get customer, prospect, and opportunity information. Isn't it time to use email and Salesforce together? The Salesforce integration with Outlook® and Gmail™ helps your reps manage their sales more efficiently. Your reps can view, edit, and add Salesforce records directly from their email, and relate emails and events to Salesforce records.

### [Outlook and Gmail Integration and Email Productivity Features](#)

Email integrations let sales reps work with Salesforce data directly in Microsoft Outlook and Gmail. Review the features available in each environment.

### [Considerations for Email Privacy Preferences in the Outlook and Gmail Integrations](#)

Your prospect's and customer's email privacy is important. Help to ensure that their email restrictions and privacy are respected when sales reps send emails from the Outlook and Gmail integrations.

### [Outlook and Gmail Integration License Support](#)

You can set up the Outlook and Gmail integrations for users who are assigned to Sales Cloud, Service Cloud, and some Lightning Platform licenses. If you extend the integration with Salesforce Inbox, users require an Inbox license.

### [Set Up the Outlook and Gmail Integrations](#)

To integrate Salesforce with Microsoft® Outlook® or Gmail™ requires a server-side setup and a client-side setup. After setup, you can either use the default email application panes or customize them to meet your reps needs.

### [Use the Outlook and Gmail Integrations](#)

Increase your productivity and work smarter and faster without leaving your email application. With the integration to Salesforce, see relevant Salesforce records in Outlook® and Gmail™, and relate email messages to Salesforce, keeping your teammates up-to-date with your communications.

### 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

### [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.

#### SEE ALSO:

[Outlook Integration System Requirements](#)

[Outlook and Gmail Integration Tour](#)

[Outlook and Gmail Integration and Email Productivity Features](#)

[Explore Email and Calendar Integration Products](#)

[Considerations for Running Outlook Integration and Salesforce for Outlook \(Retiring\) Simultaneously](#)

[Outlook Integration System Requirements](#)

[Outlook and Gmail Integration Tour](#)

## Outlook and Gmail Integration and Email Productivity Features

Email integrations let sales reps work with Salesforce data directly in Microsoft Outlook and Gmail. Review the features available in each environment.

The Outlook integration (with or without email productivity features) is available in the [Microsoft AppSource Store](#) as a Salesforce add-in. The Gmail integration (with or without email productivity features) is available in the [Chrome Web Store](#) as a Salesforce Chrome extension. Some email productivity features are also available when sending email from Lightning Experience.

 **Note:** Email productivity features are available with an Inbox, Sales Cloud Einstein, or Sales Engagement license. Sales reps can access email productivity features from their desktop email applications or Lightning Experience.

The table lists the features available in each environment.

Feature	Outlook and Gmail Integration	Outlook and Gmail Integration with Email Productivity Features
Use the Lightning App Builder to customize the layout and features that reps see (admins only)	✔	✔
Add Lightning components, including AppExchange components (admins only)	✔	✔
Log emails and events to Salesforce records	✔	✔
Log emails and events to Salesforce records created from custom objects	✔	✔ (Custom objects included as suggested records)

#### 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

Feature	Outlook and Gmail Integration	Outlook and Gmail Integration with Email Productivity Features
Log emails and events to Salesforce records from a shared folder	✓	✓ (Outlook Only)
Create Salesforce contacts, leads, and other records	✓	✓
Log a call using a global action	✓	✓ (Log manually)
Use Lightning and HTML email templates	✓	✓
Report on activities	✓	✓
Insert available times for internal and external meetings and schedule meetings on behalf of a colleague*	✗	✓
Insert a scheduling link allowing the recipient to create internal and external meetings at a time that works for them*	✗	✓
Insert the next three available meeting times for each of the next three business days, excluding the current business day*	✗	✓
Schedule emails to send later*	✗	✓
View, edit, and create text shortcuts	✗	✓
Know when recipients open emails	✗	✓
Know when recipients click links in emails	✗	✓

\*Also available when sending an email from Lightning Experience if you have an Inbox license.

 **Note:** When using email integrations, you can log emails to cases but not send an email directly from a case.

Some Einstein features, available in Lightning Experience, are also available.

Einstein Feature	Outlook and Gmail Integration	Outlook and Gmail Integration with Email Productivity Features
Einstein Activity Capture for automatic email and event logging	✓	✓
Einstein Sales Emails	✓	✓
Lead Scoring	✓	✓
Opportunity Scoring	✓	✓

Einstein Feature	Outlook and Gmail Integration	Outlook and Gmail Integration with Email Productivity Features
Opportunity Insights	✓	✓
Account Insights	✓	✓
Email Insights	✗	✗
Recommended Connections	✗	✗

## SEE ALSO:

[Outlook Integration System Requirements](#)

[Gmail Integration System Requirements](#)

[Salesforce Inbox](#)

[Email Customers](#)

[Einstein Features in Sales Cloud](#)

## Considerations for Email Privacy Preferences in the Outlook and Gmail Integrations

Your prospect's and customer's email privacy is important. Help to ensure that their email restrictions and privacy are respected when sales reps send emails from the Outlook and Gmail integrations.

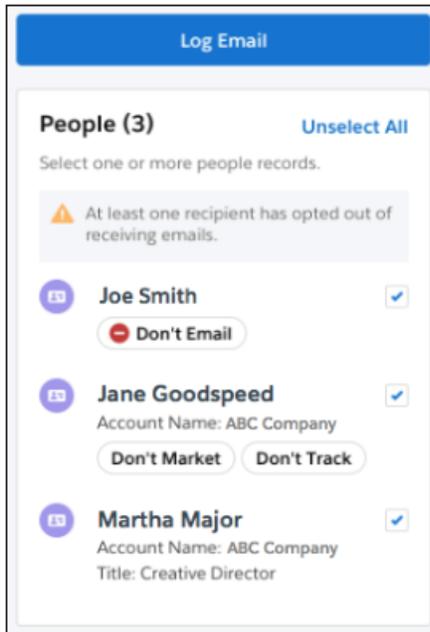
Keep these considerations in mind if you've enabled email privacy settings for your company:

- Email privacy settings for contacts, leads, and person accounts are available in the record details. Email privacy settings apply whether you're sending the email from Lightning Experience or from Outlook or Gmail.
- The integrations show when a contact, lead, or person has opted to not receive a type of email, or to not have email messages tracked.

### 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



- The Send Non-Commercial Email permission, which allows Salesforce users to send transactional emails from Lightning Experience, isn't enforced in the Outlook and Gmail integrations. It's the sales reps' responsibility to respect an email recipient's privacy when sending emails from Outlook or Gmail.

#### SEE ALSO:

- [Set Up Tracking and Storage of Certain Data Privacy Preferences](#)
- [Enable the Enforce Email Privacy Settings Preference](#)
- [Considerations for Opting Out of Email](#)
- [What's the Difference Between Email Opt Out and Individual Email Privacy Settings?](#)

## Outlook and Gmail Integration License Support

You can set up the Outlook and Gmail integrations for users who are assigned to Sales Cloud, Service Cloud, and some Lightning Platform licenses. If you extend the integration with Salesforce Inbox, users require an Inbox license.

The Outlook and Gmail integrations support users working from these licenses:

- Sales Cloud
- Service Cloud
- Lightning Platform

Outlook and Gmail integrations with Inbox support users who also have one of these licenses, and Inbox permissions enabled:

- Inbox
- Sales Cloud Einstein
- Sales Engagement

#### 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

A Salesforce user requires a single Inbox license to access Inbox features in their Outlook or Gmail account. The user can access Inbox features from multiple email accounts with a single Inbox license. However, logged emails from each email account log to the same Salesforce account.

 **Note:** The Outlook and Gmail integrations with or without Inbox aren't supported in partner communities.

SEE ALSO:

[Outlook Integration System Requirements](#)

[Gmail Integration System Requirements](#)

## Set Up the Outlook and Gmail Integrations

To integrate Salesforce with Microsoft® Outlook® or Gmail™ requires a server-side setup and a client-side setup. After setup, you can either use the default email application panes or customize them to meet your reps needs.

### [Considerations for Setting Up the Outlook or Gmail Integration](#)

Before setting up the Outlook or Gmail integration, review limitations and other information about how the integrations work.

### [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.

### [Set Up the Integration with Gmail](#)

The integration between Salesforce and Gmail™ requires both Salesforce setup and a short client-side setup procedure. But don't worry. You can turn on the integration and get the Salesforce extension 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.

### [Set Up Event Logging from Outlook and Gmail](#)

The Outlook and Gmail integrations let sales reps log events to Salesforce records. To get the most accurate picture of the events that sales reps are hosting, enable additional Salesforce options that also apply to logging events from Outlook and Gmail.

### [Customize the Email Application Pane for Outlook and Gmail](#)

You can tailor the email application pane used in Microsoft® Outlook® and in Gmail™ to better fit how your reps do their work.

### [Extend the Outlook and Gmail Integrations with Inbox](#)

Add Inbox productivity features to the integration with Microsoft® Outlook® and with Gmail to provide your sales reps with more tools. Features include productivity enhancers such as availability scheduling for meetings, tracking when emails are opened, and scheduling when to send emails. Add one or all the productivity features for your sales reps.

### 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 the Outlook or Gmail Integration

Before setting up the Outlook or Gmail integration, review limitations and other information about how the integrations work.

### General

- Setting up the Outlook or Gmail integration 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 Outlook and Gmail integration include the base integration experience, and Inbox features are unlocked when users are set up to use Inbox.
- 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 typical My Domain and SSO configurations, reps can choose the Custom Domain option on the Salesforce login page and enter your My Domain login URL. After sales reps navigate to your domain, they're authenticated in Salesforce and working in the integration.
- The Outlook integration doesn't support custom login flows.

### EDITIONS

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

### Outlook and Gmail Integration Features

- The Outlook and Gmail integrations use email application panes to define the layout of components in the integration side panel. The default pane gets you up and running quickly. To include, exclude, or reorder components in the email application pane, you can create custom email application panes and assign them to user profiles.
- Users can view and edit records related to an email or an event. Review these considerations for viewing and editing records in the Outlook and Gmail integration.
  - You can't change the order or change the tabs that appear in the record detail.
  - The fields available in the Details tab are shown in the order they're defined in the page layout for that user. Any Lightning components added to the page layout aren't shown in the integration.
  - If the user has access to Chatter, the record detail includes a Chatter tab with the record's Chatter feed.
  - If a task can be related and the user has access to the activity timeline, the record detail also includes an Activity tab.
- To automatically log emails to related Salesforce records, set up Einstein Activity Capture. Users who are configured in Einstein Activity Capture to capture emails see sharing options instead of manual logging options in the integration.

### SEE ALSO:

[Outlook and Gmail Integration and Email Productivity Features](#)

[Extend the Outlook and Gmail Integrations with Inbox](#)

[What Does Einstein Activity Capture Do?](#)

## 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.

### Outlook Integration System Requirements

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

### Roles Required to Set Up the Outlook Integration

Setting up the integration with Microsoft® Outlook® requires a Salesforce administrator, a Microsoft Exchange server admin, and the users running the integration within Outlook.

### Guidelines for Setting Up the Outlook Integration

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

### Guidelines for Logging Email Attachments in the Outlook Integration

Make sure that you understand how the Outlook integration works with email attachments.

### Microsoft Exchange Server Setup for the Outlook Integration

Depending on your Exchange server and Outlook versions, and the features that your reps need, set up Exchange Web Services (EWS) so the server can communicate with Salesforce. To determine if Exchange server setup is required for the Outlook integration in your implementation, review the configuration options and considerations for each approach.

### Turn On the Outlook Integration in Salesforce

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

### Deploy the Outlook Integration to Users

To use the Outlook integration, each sales rep needs the Salesforce add-in, which provides the integration features. The add-in includes the base integration experience, and Inbox features are unlocked when a user is set up to use Inbox.

### 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.

## 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

## SEE ALSO:

[Implementation Guide: Outlook Integration Implementation Guide](#)

[Security Guide: Salesforce Email Integration Security Guide](#)

## 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"> <li>• Exchange Online with Office 365</li> <li>• Exchange Online with GCC High (not supported if you also use Salesforce Inbox)</li> <li>• Exchange 2019, 2016, or 2013 on-premises</li> </ul> <p>Hybrid Exchange server environments are supported. For example, when some users connect to Exchange Online and some users connect using an on-premises Exchange server. Each user's client must meet the client requirements.</p> <p>Review <a href="#">Microsoft Exchange Server Setup</a>.</p>
Desktop and web email clients	<p>Any of the following:</p> <ul style="list-style-type: none"> <li>• Office version 16.0.11629 or later running on Windows 10 version 1903 or later, including Office 365 or Office 2019 (retail only)</li> <li>• Outlook in Office 2021, volume and retail version</li> <li>• Outlook 2019, unless it's a volume-licensed version.</li> </ul> <p><b>!</b> <b>Important:</b> Support for Outlook 2013, 2016, and volume-licensed versions of Outlook 2019 ended on December 31, 2022. You can continue to use the Outlook integration after December 2022. However, Salesforce no longer provides support, bug fixes, or new features in the older versions of Outlook. Make plans now to upgrade to the latest versions of Outlook and Windows.</p> <ul style="list-style-type: none"> <li>• Outlook on the web</li> <li>• New or legacy Outlook for Mac 2016 or 2019. To determine which Outlook for Mac experience you have, see the <a href="#">Microsoft documentation about the new Outlook for Mac</a>.</li> </ul> <p><b>!</b> <b>Important:</b> The Outlook integration is built on the Microsoft Office add-in framework. Microsoft develops and maintains that framework and it's a non-SFDC application. To ensure you're running the most secure version, we recommend running the latest version of Outlook and Windows 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"> <li>• For Current or Office Insider channels users, the pin is available in Outlook 2016 for Windows build 7668.2000 and later.</li> </ul>

### EDITIONS

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

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

What	Requirements
	<ul style="list-style-type: none"> <li>• For Outlook on the web users, the pin is available if the backend is Office 365.</li> <li>• For new or legacy Outlook for Mac users, the pin is available in version 16.13.180513 and later.</li> <li>• For Deferred channel users, the pin is available in Outlook 2016 for Windows build 7900.xxxx and later.</li> </ul>
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"> <li>• Google Chrome, most recent stable version</li> <li>• Mozilla Firefox, the most recent stable version. Set Enhanced Tracking Prevention to <b>Standard</b> or <b>Strict</b>. Add your company's myDomain, the generic <code>login.salesforce.com</code>, and any Salesforce domains to the privacy preference exception list. Also add <code>https://*.outlook.com</code>, <code>https://*.office365.com</code>, <code>https://*.office.com</code>, and any Outlook URL used for login. <ul style="list-style-type: none"> <li>– In newer Mozilla versions, add a site to the privacy preference exception list by following the instructions here: <a href="#">Enhanced Tracking Protection in Firefox for desktop</a></li> <li>– In older Mozilla versions, click <b>+</b> to add a site to the privacy preference exception list.</li> </ul> </li> <li>• Microsoft Edge, most recent stable version (Windows only). Set Tracking prevention to <b>Basic</b>. If you choose to leave Tracking prevention set to <b>Balanced</b> or <b>Strict</b>, add Salesforce domains as exceptions along with <code>https://*.outlook.com</code>, <code>https://*.office365.com</code>, <code>https://*.office.com</code>, and any Outlook URL used for login.</li> <li>• Apple Safari, the most recent stable version. Turn off Prevent cross-site tracking.</li> <li>• Mobile browsers aren't supported.</li> </ul>
Outlook JavaScript API Requirements Set Version	<p>JavaScript API version 1.4 or later</p> <p>Use version 1.8 or later if you don't want to publicly expose your EWS endpoint. For more information, see <a href="#">Microsoft Exchange Server Setup</a>.</p>
Security encryption protocol on your email server (for Inbox licenses only)	TLS 1.2 or later.
Other Features	Requirements
Server configurations	We support using terminal servers, such as Citrix® servers.
Salesforce Add-in Access	To use the integration, each Outlook user needs the Salesforce add-in for Outlook. Users can get the Salesforce add-in themselves from Microsoft AppSource, or Exchange admins can get the add-in

## What Requirements

and distribute it using Microsoft Centralized Deployment. If your security policies don't allow access to Microsoft AppSource, there's an option to install the integration using a file-based install.

### SEE ALSO:

[Security Guide: Salesforce Email Integration Security Guide](#)

[Microsoft Exchange Server Setup for the Outlook Integration](#)

[Roles Required to Set Up the Outlook Integration](#)

[Explore Email and Calendar Integration Products](#)

[Considerations for Running Outlook Integration and Salesforce for Outlook \(Retiring\) Simultaneously](#)

[Outlook and Gmail Integration](#)

## Roles Required to Set Up the Outlook Integration

Setting up the integration with Microsoft® Outlook® requires a Salesforce administrator, a Microsoft Exchange server admin, and the users running the integration within Outlook.

 **Note:** Each Exchange server setup is different. We've provided high-level instructions for basic and common Exchange server setups. If you run into problems, contact Salesforce to get the integration up and running.

What	Salesforce Admin	Exchange Admin	Outlook User	More About This Step
Confirm that your server, clients, and browsers meet the requirements	✓	✓		<a href="#">Outlook Integration System Requirements</a> on page 266
Set up your Microsoft Exchange server		✓		<a href="#">Microsoft Exchange Server Setup for the Outlook Integration</a>
Turn on the integration in Salesforce	✓			<a href="#">Turn On the Outlook Integration in Salesforce</a>
Ensure that sales reps can access the integration while they're in Outlook	✓	✓	✓	The integration requires the Salesforce add-in within Outlook. You can either push the add-in from your Exchange server, or you can have each rep get the app from the Microsoft AppSource store.  <a href="#">Deploy the Outlook Integration to Users</a> <a href="#">Get the Outlook Integration</a>

### EDITIONS

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

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What	Salesforce Admin	Exchange Admin	Outlook User	More About This Step
Connect an Outlook account to Salesforce			✓	<a href="#">Get the Outlook Integration</a>
<b>Optional</b>				
Add Inbox features to the Outlook integration	✓			<a href="#">Extend the Outlook and Gmail Integrations with Inbox</a>
Customize which components are included in the Outlook integration or change the pane's layout	✓			<a href="#">Customize the Email Application Pane for Outlook and Gmail</a>

## Guidelines for Setting Up the Outlook Integration

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

### 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](#).

### Salesforce Add-In and Setup

- Each sales rep needs the Salesforce add-in within Microsoft Outlook, which is available from Microsoft AppSource. We recommend that either users get the add-in from Microsoft AppSource or that Exchange admins get the add-in and distribute it using Microsoft Centralized Deployment (MCD). If your security policies don't allow access to Microsoft AppSource, download an install file available on the Outlook Integration and Sync page in Salesforce setup. According to Microsoft, Centralized Deployment can take 24–72 hours.
- As of February 1, 2022, users accessing the Outlook integration in an SSO setup, who are also assigned the Multi-Factor Authentication for User Interface Logins user permission, aren't required to enter multi-factor challenges. This behavior applies to all Salesforce orgs.
- The Outlook integration respects the session timeout duration set in Salesforce. When a session times out, users are prompted that their session expired. If the user mapping created when the user first logged in to the integration still exists, clicking OK in the prompt refreshes the integration without logging in again. See the existing user mappings in the Outlook Integration and Sync page in Salesforce setup.
- 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 setup page. Add your trusted domains, such as *webmail.your\_company.com* if your users access Outlook on the web using URLs that are specific to your company.

### 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 Features and Optional Setup

- 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 to deny access to certain global quick actions within the integration, add or change the publisher layout.
- By using Enhanced Email, reps can easily associate the emails that they compose to relevant Salesforce records. When Enhanced Email is disabled, emails are associated as tasks. Also enable Email to Salesforce.
- To allow users to log an event to more than one contact, enable Shared Activities.
- For Sales Engagement users who also use Einstein Activity Capture, the integration adds the Email to Salesforce Address as a BCC recipient on emails. 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 Sales Engagement 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 supports the New button only if you skip the record type selection page in the override configuration.

### Outlook Integration in Safari on an iPad

Buttons on the email application pane, such as Save and Cancel, are at the bottom of the pane.

#### SEE ALSO:

[Deploy the Outlook Integration to Users](#)

[Enhanced Email and the Outlook Integration](#)

[Set Up Email to Salesforce](#)

[Email Application Publisher Layouts](#)

[Multi-Factor Authentication](#)

[Einstein Activity Capture](#)

[Enable Quick Text](#)

[Email Address Internationalization \(EAI\)](#)

[External Link: "ErrorItemNotFound" Error when Office Add-ins Make REST Calls Against an Outlook item ID](#)

## Guidelines for Logging Email Attachments in the Outlook Integration

Make sure that you understand how the Outlook integration works with email attachments.

### General

- In Lightning Experience, attachments are added as files to Salesforce.
  - To make attachments available in the Attachments section of a logged email, set up the Outlook integration to log emails as email messages.
  - To make attachments available in the Files section of the Salesforce Email page layout, set up the Outlook integration to log emails as tasks. To add the Files related list to your reps' email page layout [customize the page layout in Object Manager](#).
- To log attachments automatically when using the Outlook integration and Log Email on Send, make sure that your reps select the **Always save email attachments** option in their My Email to Salesforce settings. If this option isn't selected, attachments in emails sent using Log Email on Send aren't automatically included with the logged email. Alternatively, reps can log email attachments manually from emails in their Sent folder.

### 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

- To add an attachment to a Salesforce record, ask your reps to [add the attachment as a file](#).

#### Outlook Integration with Einstein Activity Capture

- To log attachments automatically, make sure that your reps send emails from Salesforce.
- To log attachments manually, make sure that Einstein Activity Capture is disabled. For more information about Einstein Activity Capture, see [Salesforce Help](#).

#### Email Attachment Size Limitations

- In Lightning Experience, the size limit for email attachments is 2 GB, with a per file attachment limit of 5 MB. For each matching record, attachments sent with the email are duplicated.
- In Salesforce Classic, the size limit for email attachments is 25 MB.
- If your reps have Einstein Activity Capture and send emails from Salesforce, they can include up to 50 email attachments per email.

#### SEE ALSO:

[Email Attachments](#)

[Guidelines for Logging Email from Outlook and Gmail to Salesforce](#)

[Guidelines for Using Emails with Einstein Activity Capture](#)

[File Size and Sharing Limits](#)

## Microsoft Exchange Server Setup for the Outlook Integration

Depending on your Exchange server and Outlook versions, and the features that your reps need, set up Exchange Web Services (EWS) so the server can communicate with Salesforce. To determine if Exchange server setup is required for the Outlook integration in your implementation, review the configuration options and considerations for each approach.

-  **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.

#### Set Up Exchange Without Public Exchange Web Services

If your Exchange server and Outlook versions support JavaScript API v1.8 or later, and you don't use Inbox, you can set up the Outlook integration without public web services. A local EWS connection is still required between Outlook and Exchange, and the Exchange Metadata URL must still be publicly exposed.

-  **Note:** This configuration is part of the Summer '21 release, available to instances on a rolling basis. Contact your Salesforce account representative for more details about your eligibility.

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

If your Exchange server or Outlook versions support JavaScript API versions 1.4 through 1.7, you can still choose to set up the Exchange without public EWS. However, users lose the following features:

- Logging attachments directly from Outlook. Users can add attachments to logged emails in Salesforce.
- Inbox productivity features.

#### 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**

Set Up Exchange with Public Exchange Web Services

 **Important:** Using this setup ensures that Outlook users have access to all the features available in the integration.

Work with your IT professional to ensure that the Exchange server is set up to do the following things.

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

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. You can also choose to install the add-in using a file available for download from the Outlook Integration and Sync page in Salesforce setup.

#### **Accept incoming Exchange Web Services (EWS) calls from Salesforce**

Your internal company policies around Exchange determine what is required in your setup to ensure Exchange can accept incoming EWS calls from Salesforce. Steps can 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](#)

#### **Accept incoming authentication calls to the Exchange Metadata URL from Salesforce**

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.

 **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](#). If you see 500 internal error responses, check [Outbound Messaging SSL CA Certificates](#) to ensure the certificate is valid.

 **Note:** A service account isn't required for the Outlook integration. If you're using Lightning Sync to sync calendar events and contacts, you could require a service account depending on your configuration.

SEE ALSO:

*External Link:* [Outlook JavaScript API requirements sets](#)

*External Link:* [Salesforce add-in in the Microsoft AppSource Store](#)

*Security Guide:* [Salesforce Email Integration Security Guide](#)

[Deploy the Outlook Integration to Users](#)

## 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.

## Deploy the Outlook Integration to Users

To use the Outlook integration, each sales rep needs the Salesforce add-in, which provides the integration features. The add-in includes the base integration experience, and Inbox features are unlocked when a user is set up to use Inbox.

Method	Notes
Microsoft AppSource (Recommended)	<p>We recommend that you or your users get the <a href="#">Salesforce add-in from Microsoft AppSource</a>. Installing the add-in from Microsoft AppSource ensures that your Outlook integration updates with new features after each Salesforce release.</p> <p>It's best to work with your Exchange admin or IT department to deploy the add-in using Microsoft Centralized Deployment from the Exchange 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 Microsoft AppSource.</p> <p>To determine whether Centralized Deployment is the right solution for you, see <a href="#">Determine if Centralized Deployment of add-ins works for your organization</a> in the Microsoft documentation. See the following Microsoft documents based on your server.</p> <ul style="list-style-type: none"> <li>• Centralized Deployment for <a href="#">Office add-ins with Office 365</a></li> <li>• Centralized Deployment for <a href="#">Office add-ins with Exchange</a></li> </ul>

### 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 the Outlook Integration

- Customize Application

### 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

Method	Notes
Manifest File	<p>If your company security policies don't allow access to Microsoft AppSource, you can download an XML manifest file to get the add-in.</p> <p>Infrequently, some features can require a change to the manifest file. If you use the manifest file to install the add-in, you must reinstall it to access features that require an update to the file. Check the release notes for each release for alerts about features that require a file update.</p> <p>Get the file from the Outlook Integration and Sync page in Salesforce setup. The file opens as an XML file in your web browser. Use the browser's Save As feature to save the page as a file. Then, either give the file to users so they can add it to their Outlook client, or deploy the add-in using Microsoft Centralized Deployment (MCD). If you give the file to users, they can install the file using the Add from File option in Outlook. According to Microsoft, Centralized Deployment can take 24–72 hours.</p>

To learn more about installing, launching, and managing the Salesforce add-in from Outlook, see the following Microsoft documentation.

- [Desktop versions of Outlook](#)
- [Outlook on the web](#)

#### SEE ALSO:

*External link:* [Salesforce add-in available in Microsoft AppSource](#)

*External link:* [Manage deployment of Office 365 add-ins in the Microsoft 365 admin center](#)

*External link:* [Get an Office add-in for Outlook](#)

## 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.

#### 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

- 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.

## Set Up the Integration with Gmail

The integration between Salesforce and Gmail™ requires both Salesforce setup and a short client-side setup procedure. But don't worry. You can turn on the integration and get the Salesforce extension 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.

### [Gmail Integration System Requirements](#)

Make sure that your system meets these requirements before you integrate with Gmail™.

### [Guidelines for Setting Up the Gmail Integration](#)

Before setting up the integration with Gmail, review which features you want to enable and whether sales reps need access to different components.

### [Guidelines for Logging Email Attachments in the Gmail Integration](#)

Make sure that you understand how the Gmail integration works with email attachments.

### [Enhanced Email and the Gmail Integration](#)

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

### [Turn On the Gmail Integration in Salesforce](#)

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

## Gmail Integration System Requirements

Make sure that your system meets these requirements before you integrate with Gmail™.

What	Requirements
Email	Gmail, available as part of Google Workspace, and a unique email domain in this format: <i>@yourcompanyname.com</i> .
Browser	<p>Google Chrome version 97 or later. We recommend running the most recent stable version.</p> <p>Ensure that the <b>Block third-party cookies</b> option isn't selected in the browser Privacy and Security settings in Chrome.</p>

### SEE ALSO:

[Security Guide: Salesforce Email Integration Security Guide](#)

[Guidelines for Setting Up the Gmail 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

### 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

## Guidelines for Setting Up the Gmail Integration

Before setting up the integration with Gmail, review which features you want to enable and whether sales reps need access to different components.

### Salesforce Chrome Extension and Access

- Each sales rep needs the Salesforce Chrome extension, which is available from the Chrome Web Store. A local install file isn't available. The application automatically updates with each Salesforce release.
- When accessing the integration in new Salesforce orgs in Winter '22, if the Keep Gmail and Salesforce Connected option in Gmail Integration and Sync is on, users who are assigned the Multi-Factor Authentication for User Interface Logins user permission aren't required to enter multi-factor challenges. If your company requires users to log in each time that their Gmail integration session expires, turn off Keep Gmail and Salesforce Connected, or set up Salesforce users with multi-factor authentication using a High Assurance session.

### Gmail Integration Features and Optional Configuration

- The Gmail integration uses publisher layouts to define global quick actions such as creating contacts, leads, and opportunities. The integration includes a default set of actions. To give users access or to deny access to certain global quick actions within the integration, add or change the publisher layout.
- To allow users to log an email from Gmail to Salesforce, enable Enhanced Email.
- To allow users to log an event to more than one contact, enable Shared Activities.
- There are limitations if an object has multiple record types and the New button in the object's related list is overridden. The integration supports the New button only if you skip the record type selection page in the override configuration.

### SEE ALSO:

[Enhanced Email and the Gmail Integration](#)

[Multi-Factor Authentication](#)

[Add Salesforce Inbox Features to the Outlook and Gmail Integrations](#)

[Customize the Email Application Pane for Outlook and Gmail](#)

[Email Application Publisher Layouts](#)

[Einstein Activity Capture](#)

[Email Address Internationalization \(EAI\)](#)

### 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**

## Guidelines for Logging Email Attachments in the Gmail Integration

Make sure that you understand how the Gmail integration works with email attachments.

### General

- In Lightning Experience, emails are logged as email messages and attachments are added as files in Salesforce. Attachments are logged by default. To remove or add attachments, edit the email.
- Reps can find their email attachments in the Files related list of the Salesforce Email page layout. To add the Files related list to your reps' email page layout [customize the page layout in Object Manager](#).
- To add an attachment to a Salesforce record, ask your reps to [add the attachment as a file](#).

### Gmail Integration with Einstein Activity Capture

- To log attachments automatically, make sure that your reps send emails from Salesforce.
- To log attachments manually, make sure that Einstein Activity Capture is disabled. For more information about Einstein Activity Capture, see [Salesforce Help](#).

### Email Attachment Size Limitations

- In Lightning Experience, the size limit for email attachments is 2 GB, with a per file attachment limit of 5 MB. For each matching record, attachments sent with the email are duplicated.
- In Salesforce Classic, the size limit for email attachments is 25 MB.
- If your reps have Einstein Activity Capture and send emails from Salesforce, they can include up to 50 email attachments per email.

### SEE ALSO:

[Email Attachments](#)

[Guidelines for Logging Email from Outlook and Gmail to Salesforce](#)

[Guidelines for Using Emails with Einstein Activity Capture](#)

[File Size and Sharing Limits](#)

## Enhanced Email and the Gmail Integration

Turn on Enhanced Email 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 the Gmail integration.

### 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™.

### 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 to manage from Salesforce Classic and Lightning Experience

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

- Related emails are saved as Email Message records.

### Considerations for Enhanced Email with the Gmail Integration

Before turning on Enhanced Email for the Gmail integration, review the following considerations:

- 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.
- 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](#)

## Turn On the Gmail Integration in Salesforce

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

 **Important:** Before you let your sales teams experience the integration with Gmail, verify that [Enhanced Email is enabled for your organization](#).

After enabling Enhanced Email for Gmail, complete these steps to enable the integration for your sales teams.

1. From Salesforce Setup, enter *Gmail* in the *Quick Find* box, then select **Gmail Integration 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 Gmail.

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

SEE ALSO:

[Get the Gmail 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**

### USER PERMISSIONS

To enable the Gmail integration

- Customize Application

## Set Up Event Logging from Outlook and Gmail

The Outlook and Gmail integrations let sales reps log events to Salesforce records. To get the most accurate picture of the events that sales reps are hosting, enable additional Salesforce options that also apply to logging events from Outlook and Gmail.

### [Allow Reps to Log Events to Multiple Contacts from Outlook and Google Calendar](#)

To gain better insight into your opportunities, and for more accurate reporting on engagements with contacts, enable Shared Activities. With Shared Activities, sales reps can select up to 50 contacts or 1 lead when logging an event from their Outlook or Google calendar.

### [Include Attendees on Events Logged from Outlook and Gmail](#)

To include all attendees from an event invitation on the Salesforce event record, make sure that the Attendees field is available on your page layouts for the Event object. Then, when sales reps log an event, all attendees on the event with matching Salesforce records are included as attendees on the event record. All attendees see the same invite on their Salesforce calendar. The attendee RSVP status isn't included.

### [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.

## Allow Reps to Log Events to Multiple Contacts from Outlook and Google Calendar

To gain better insight into your opportunities, and for more accurate reporting on engagements with contacts, enable Shared Activities. With Shared Activities, sales reps can select up to 50 contacts or 1 lead when logging an event from their Outlook or Google calendar.

### SEE ALSO:

[Enable Shared Activities](#)

[Considerations for Enabling Shared Activities](#)

### 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

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## Include Attendees on Events Logged from Outlook and Gmail

To include all attendees from an event invitation on the Salesforce event record, make sure that the Attendees field is available on your page layouts for the Event object. Then, when sales reps log an event, all attendees on the event with matching Salesforce records are included as attendees on the event record. All attendees see the same invite on their Salesforce calendar. The attendee RSVP status isn't included.

 **Note:** In Salesforce Classic, attendees are captured in the Hasn't Responded field, which is available by default.

SEE ALSO:

[Event Fields in Lightning Experience](#)  
[Create Page Layouts](#)

## 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.

### 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

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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

 **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.

## SEE ALSO:

[Field Permissions](#)

[Add or Edit Picklist Values](#)

*Knowledge Article: Reporting on the Type field for Activities or Events*

## Customize the Email Application Pane for Outlook and Gmail

You can tailor the email application pane used in Microsoft® Outlook® and in Gmail™ to better fit how your reps do their work.

### [Considerations for Customizing the Email Application Pane for Outlook and Gmail](#)

You can customize the email application pane to better reflect your reps' workflow and your company's processes. Keep these considerations in mind when customizing the various components.

### [Build Email Applications Panes for Outlook and Gmail](#)

When you customize an email pane, you specify the Salesforce content and features that sales reps see in Microsoft® Outlook® and in Gmail™. To create custom panes, use the Lightning App Builder and add standard and custom components, including components from AppExchange.

### [Assign Custom Email Application Panes for Outlook and Gmail to User Profiles](#)

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

## SEE ALSO:

[Considerations for Customizing the Email Application Pane for Outlook and Gmail](#)

[Assign Custom Email Application Panes for Outlook and Gmail to User Profiles](#)

## Considerations for Customizing the Email Application Pane for Outlook and Gmail

You can customize the email application pane to better reflect your reps' workflow and your company's processes. Keep these considerations in mind when customizing the various components.

 **Tip:** We recommend modifying one of the default panes to meet your needs. Start with a base pane, or if you're using Inbox in the integration, start with a pane with Inbox features.

You can customize any of these parts of the pane.

### EDITIONS

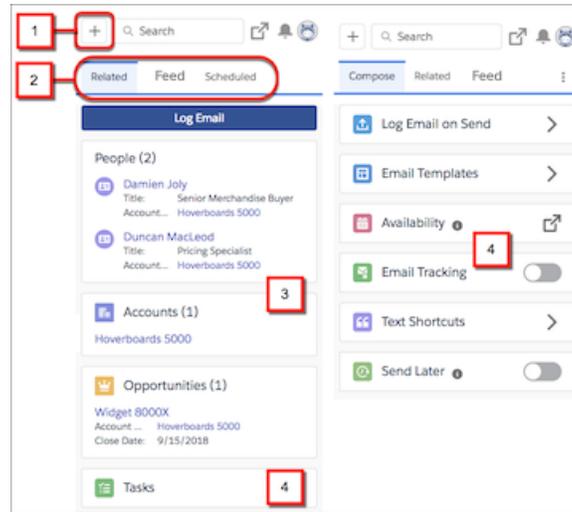
Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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



### Create records (1)

Let sales reps create accounts, cases, leads, opportunities, and custom objects directly from their email. A quick action menu assigned to a publisher layout determines which record types reps can create. The menu also includes other actions, such as logging a call. Your Salesforce edition determines how you set up an action menu and whether you can customize the menu's options.

### Organize tabs (2)

Control which components are available in each tab, the tab order, tab names, and whether they're available when reps are reading or composing emails. You can also set a default tab to display when reps are reading or composing an email. These tab customizations apply only to the tabs shown in the main email integration pane. You can't change the tab order or tab names in the record detail shown when a user clicks a related record to access its details.

### Choose available objects (3)

Select the objects available for email and event logging and returned through search. You can include standard objects, such as accounts, opportunities, and people, and custom objects that you created. We recommend grouping the objects on a single tab. Place the object type that your reps log emails and events to most often at the top so it's easy to access. The objects display the first three fields included in their assigned compact layout.

 **Note:** If you use Einstein Activity Capture, you can also add quote and contract objects to your email application pane. To include these objects, make sure that you [enable quotes](#) and [set up contracts](#).

### Add features (4)

Include the features available to email integration users, such as the Log Email button, tasks, and email templates. If you use Inbox, you can include Inbox features such as calendar availability and text shortcuts. Only the features contained in a tab are available to email integration users. You can also use filters to determine which components are available during read mode and compose mode. For the best experience, group components based on whether they apply to reading or composing emails.

SEE ALSO:

[Email Application Publisher Layouts](#)

[Send Email Action Considerations for Cases](#)

[Developer Guide: Create Components for the Outlook and Gmail Integrations](#)

## Build Email Applications Panes for Outlook and Gmail

When you customize an email pane, you specify the Salesforce content and features that sales reps see in Microsoft® Outlook® and in Gmail™. To create custom panes, use the Lightning App Builder and add standard and custom components, including components from AppExchange.

 **Note:** If you use Inbox features in your email integration, you can add Inbox components, such as email tracking. Only users with an Inbox license can see Inbox components.

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**, and select **Customize content with App Builder**.
3. Navigate to the Lightning App Builder.
  - In Lightning Experience, from Setup, under Email Application panes, click **Create New Pane**. Follow the steps until you reach the design page. If you're adding Inbox components, from the Create New Pane menu, select **With Inbox Features**. 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.
4. Drag components onto the pane, and arrange them in the order you want them to appear. To show accounts, activities, cases, quotes, or contracts that are related to an email or event, add the **Accounts, Opportunities, and More** component to the pane. Select the object type that you want to show in the component. If your company is set up with Inbox, you can use the same component to show custom objects. The email application pane can have multiple **Accounts, Opportunities, and More** components to show different object types.

 **Tip:** To show matching records that aren't people or that are a different object type than what is selected in a **Accounts, Opportunities, and More** component, add the **Other Logged Record** component.

5. To view the page properties, add a description, or create a filter that determines when a component appears, click the empty area of the canvas.

 **Tip:** Some components are useful when reading emails or viewing events while others are helpful when composing emails or editing events. Use a filter to determine when a particular component is shown.

6. Click **Save**.
7. 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 integration setup pages.

### SEE ALSO:

[Considerations for Customizing the Email Application Pane for Outlook and Gmail Dynamic Lightning Pages](#)

### 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 customize the email application panes:

- Customize Application

To create and save Lightning pages in the Lightning App Builder:

- Customize Application

## Assign Custom Email Application Panes for Outlook and Gmail to User Profiles

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

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

1. Navigate to your custom email pane.
  - In Lightning Experience, from Setup, in the Quick Find box, enter *Integration*, and then select either **Outlook Integration and Sync** or **Gmail Integration and Sync**. Expand **Let users access Salesforce records**, 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 **New** under Lightning Pages. Select **Email Application Pane**. Follow the steps until you reach the design window.
2. Assign a custom pane as the new default, or select specific user profiles and follow the on-screen steps.

SEE ALSO:

[Build Email Applications Panes for Outlook and Gmail](#)

## Extend the Outlook and Gmail Integrations with Inbox

Add Inbox productivity features to the integration with Microsoft® Outlook® and with Gmail to provide your sales reps with more tools. Features include productivity enhancers such as availability scheduling for meetings, tracking when emails are opened, and scheduling when to send emails. Add one or all the productivity features for your sales reps.

Available in: Lightning Experience

Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance,** and **Unlimited** Editions

All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

### [Guidelines for Extending the Outlook and Gmail Integrations with Inbox](#)

To provide more features when composing emails, add Inbox features to the Outlook and Gmail integration. Review some considerations before adding Inbox.

### [Select Who Can Use Salesforce Inbox Features in the Outlook and Gmail Integrations](#)

Add Inbox features to the integration with Microsoft® Outlook® or with Gmail to provide your sales reps with more tools to streamline their work. Use one of the Inbox permission sets to turn on the productivity features for sales reps who need them.

### [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.

### 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 customize the email application panes:

- Customize Application

To create and save Lightning pages in the Lightning App Builder:

- Customize Application

### [Add Zoom Video Conferencing to the Outlook and Gmail Integrations with Inbox](#)

Integrate Salesforce with Zoom to give reps the option to automatically create and add Zoom links to meetings that are created using the Insert Availability feature.

### [Considerations for Tracking Emails in the Outlook and Gmail Integrations with Inbox](#)

When you add Inbox features to the Outlook or Gmail integration, sales reps can track when recipients open emails and click links in the emails they send. Before you enable email tracking for your sales reps, review these key considerations about setup and how emails are tracked.

### [Outlook and Gmail Integration with Inbox Cookies](#)

The Outlook and Gmail integrations with Inbox use cookies to establish and identify unique user sessions and to increase security.

### [Move from the Legacy Inbox Add-In or Extension to the Outlook or Gmail Integration with Inbox](#)

On March 31, 2021, the Legacy Inbox Outlook Add-in and Gmail Chrome Extension are retiring. Inbox features are now available in the Salesforce add-in available in the App Source Store and Chrome Web Store, respectively. That app contains the features for the Outlook and Gmail integrations. An Inbox license unlocks Inbox features that your reps use today.

#### SEE ALSO:

[Permission Sets](#)

[Einstein Activity Capture](#)

[Move Reps from Legacy Salesforce Inbox to the Outlook or Gmail Integration with Inbox](#)

[Outlook Integration System Requirements](#)

[Gmail Integration System Requirements](#)

[Set Up Inbox](#)

## Guidelines for Extending the Outlook and Gmail Integrations with Inbox

To provide more features when composing emails, add Inbox features to the Outlook and Gmail integration. Review some considerations before adding Inbox.

Available in: Lightning Experience

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Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance,** and **Unlimited** Editions

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All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

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- An Inbox license is available with Sales Engagement, with Sales Cloud Einstein, and as a standalone license.
- Turning on Inbox features in Government Cloud and Government Cloud Plus organizations may send data outside the authorization boundary. Contact your Salesforce account executive for more details.
- The Salesforce add-in for Outlook is available in the Microsoft AppSource and the Chrome Web Store for Gmail. The add-in includes Inbox features, which are unlocked with an Inbox license. Sales reps don't install a different add-in.
- Inbox is supported in sandbox orgs. If you're creating a sandbox from a production org that has Inbox enabled, you must enable Inbox in the sandbox org again. It's disabled in the sandbox org by default.
- 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 or Gmail Integration and Sync page in Salesforce Setup.

- To remove features from the integration, use the Lightning App Builder to remove the feature's component from the email application panes. To turn off the email tracking feature for individual users, remove the email tracking components using Lightning App Builder. To turn off the email tracking feature for all users, use the Email Tracking option on the Salesforce Inbox page in Salesforce Setup.
- To generate reports about email messages and their effectiveness, create a custom report type using the Email Message primary object.
- If quick text is enabled in Salesforce Setup, text shortcuts are available in Inbox. Each sales rep's text shortcuts are saved and available only for them. Use email templates for larger portions of text or for text that you want to make available to multiple reps.
- If you use Visualforce email templates and reps send their emails from the Lightning Experience, include the `<br />` in the email template to ensure line breaks appear correctly.
- Sending or receiving emails from addresses that contain non-Latin-based characters isn't supported when Inbox is enabled.
- To automatically create and add Zoom links to meetings that are created using the Insert Availability feature, enable the Zoom integration. Reps can connect their Zoom account to use when generating the meeting.

SEE ALSO:

[Zoom Integration](#)

[Salesforce Help: Create a Custom Report Type](#)

## Select Who Can Use Salesforce Inbox Features in the Outlook and Gmail Integrations

Add Inbox features to the integration with Microsoft® Outlook® or with Gmail to provide your sales reps with more tools to streamline their work. Use one of the Inbox permission sets to turn on the productivity features for sales reps who need them.

Available in: Lightning Experience

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Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance, and Unlimited Editions**

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All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

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Assign one of the standard permission sets to the sales reps that you want to have access to Inbox productivity features in their email.

- Inbox With Einstein Activity Capture
- Inbox Without Einstein Activity Capture
- Inbox Included
- Sales Cloud Included Bundle

 **Note:** Inbox is included with Performance and Unlimited editions. If you have users who accessed Inbox through the Inbox, Sales Cloud Einstein, or Sales Engagement license before Summer '22, we recommend that you assign those users to the Inbox Included or Sales Cloud Included Bundle permission set, or a custom permission set that includes the Inbox permission. To make these assignments, assign the new permission set to your users before removing the old permission set. Beginning in Summer '22, you can't add users to the old Inbox, Sales Cloud Einstein, or Sales Engagement permission sets.

**Important:** If you use Sales Cloud Einstein, Inbox permissions are included in the Sales Cloud Einstein permission set. If you use Sales Engagement, Inbox permissions are included in the Sales Engagement User permission set. Inbox isn't included in the Sales Engagement User Included, Sales Engagement Cadence Creator Included, or Einstein Activity Capture Included permission set.

SEE ALSO:

[Select Who Can Use Sales Cloud Einstein](#)

[Assign Permission Sets for Sales Engagement Users](#)

[Move from the Legacy Inbox Add-In or Extension to the Outlook or Gmail Integration with Inbox](#)

## 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.

Available in: Lightning Experience

Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance,** and **Unlimited** Editions

All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

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 Sales Engagement, the Sales Engagement 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.

### 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

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

SEE ALSO:

[Select Who Can Use Salesforce Inbox Features in the Outlook and Gmail Integrations](#)

[Customize the Email Application Pane for Outlook and Gmail](#)

[Set Up Inbox](#)

[Lightning App Builder](#)

## Add Zoom Video Conferencing to the Outlook and Gmail Integrations with Inbox

Integrate Salesforce with Zoom to give reps the option to automatically create and add Zoom links to meetings that are created using the Insert Availability feature.

You enable the Zoom integration to connect Salesforce with Zoom. Then, reps can connect their company Zoom account. After connecting their accounts, reps can select to have a Zoom meeting link automatically generated when a meeting is created using the Insert Availability feature. Reps don't have to manually generate their own link and remember to add the link to meeting after it's created.

SEE ALSO:

[Zoom Integration](#)

## Considerations for Tracking Emails in the Outlook and Gmail Integrations with Inbox

When you add Inbox features to the Outlook or Gmail integration, sales reps can track when recipients open emails and click links in the emails they send. Before you enable email tracking for your sales reps, review these key considerations about setup and how emails are tracked.

Available in: Lightning Experience

Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance,** and **Unlimited** Editions

All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

### EDITIONS

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 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 Sales Engagement, which is available for an extra cost in: **Enterprise, Performance,** and **Unlimited** Editions

### General Considerations

- Email tracking applies to HTML-based emails and mass emails.
- In Lightning Experience, you can see email tracking information in the activity timeline.
- In Salesforce Classic, you can see email tracking information in the HTML Email Status related list and the HTML Email Status report.
- To restrict access to email tracking for individual reps, create custom email application panes that don't include email tracking components. Assign the custom panes to specific user profiles. To restrict access to email tracking for all reps, turn off the Email Tracking option in the Salesforce Inbox Setup Assistant in Salesforce setup.
- The Email Tracking - List component is on the Feed tab in the default email application pane. This component shows all sales engagement and alert information for emails across Salesforce, not just for emails sent from Outlook or Gmail. The sales engagement data reps receive on the Feed tab depends on the features enabled in Salesforce.

- The Email Tracking - Individual Receipt is on the Related tab in the default email application pane. This component shows the tracking details for the selected email. You can add the Email Tracking - Individual Receipt component to any tab that is available during read mode.
- Emails set for tracking are tracked indefinitely. If you remove the tracking components from the email application pane after an email is sent or turn off email tracking, the email is still tracked. But removing the components restricts access to the tracking information.
- If email tracking is enabled in your Sales Engagement setup, be sure to also enable it for the integration. Both must be enabled to track emails sent from the Work Queue in the integration.
- To track links in emails started from the Sales Engagement Work Queue, also add the Email Tracking component to a tab available in Compose mode.

#### Outlook or Gmail Integration with Inbox and Einstein Activity Capture

- When sales reps send an email, tracking information isn't automatically logged. To automatically log tracking information, give your reps access to Inbox features and set emails to track.
- When sales reps send an email, tracking information shows in the activity timeline, but doesn't appear in the HTML Email Status report.

#### SEE ALSO:

- [Customize the Email Application Pane for Outlook and Gmail](#)
- [Considerations for Tracking Emails Sent from Salesforce Inbox](#)
- [Considerations for Email Open Tracking](#)

### Outlook and Gmail Integration with Inbox Cookies

The Outlook and Gmail integrations with Inbox use cookies to establish and identify unique user sessions and to increase security.

Available in: Lightning Experience

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Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance, and Unlimited** Editions

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All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

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The Outlook and Gmail integrations with Inbox use cookies to maintain data access during a session and to prevent cross-site request forgery when requests are made between the client and the server.

The following table describes the cookies that Salesforce collects for the Outlook and Gmail integrations with Inbox. These cookies are required for the apps to work correctly.

Cookie Name	Duration	Cookie Type	Description
JSESSIONID	Session	Required	Identifies a user's unique session of the app for login, authentication, and data purposes. Each time a user logs in, a different session ID is created so information is stored and passed between the client and server for that session only.

Cookie Name	Duration	Cookie Type	Description
XSRF-TOKEN	Session	Required	Captures a value that is used to identify requests from a user's logged in session. Salesforce servers generate and send the cookie to the client when the session is established. When the client requests information from the server, it includes the unique cookie value in the request. The cookie values must match for the server to accept the request.

### Move from the Legacy Inbox Add-In or Extension to the Outlook or Gmail Integration with Inbox

On March 31, 2021, the Legacy Inbox Outlook Add-in and Gmail Chrome Extension are retiring. Inbox features are now available in the Salesforce add-in available in the App Source Store and Chrome Web Store, respectively. That app contains the features for the Outlook and Gmail integrations. An Inbox license unlocks Inbox features that your reps use today.

Available in: Lightning Experience

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Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance, and Unlimited** Editions

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All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

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Change is never easy, but we're here to help make the transition as smooth as possible.

Review the differences between the legacy versions of Inbox and the new Outlook and Gmail integrations with Inbox. Migrate users to the new products, and share the information with them to make their transition a smooth one. Review the system requirements before you get started to ensure that your server and email clients meet the requirements needed for the new integrations.

#### [Compare the Legacy Inbox Add-In and Extension to the Outlook and Gmail Integrations with Inbox](#)

The new Salesforce add-in, which provides the Outlook and Gmail integration base features and Inbox features is built on the trusted Salesforce platform. That platform brings you the security you trust with Salesforce and the side panel is customizable using Lightning App Builder to better meet your users needs.

#### [Move Reps from Legacy Salesforce Inbox to the Outlook or Gmail Integration with Inbox](#)

The integration with Microsoft® Outlook® and with Gmail™ with Inbox help increase productivity while composing emails. If your sales reps are using older versions of Salesforce Inbox on a desktop, you can easily move reps to the new version.

#### [Tips for Working in the Gmail Integration with Inbox](#)

If your company is moving from the legacy Salesforce Inbox Chrome extension to the Gmail integration with Inbox, review the differences between the two solutions for a smooth transition.

[Tips for Working in the Outlook Integration with Inbox](#)

If your company is moving from the legacy Salesforce Inbox Outlook add-in to the Outlook integration with Inbox, review the differences between the two solutions for a smooth transition.

SEE ALSO:

[Outlook Integration System Requirements](#)

[Gmail Integration System Requirements](#)

Compare the Legacy Inbox Add-In and Extension to the Outlook and Gmail Integrations with Inbox

The new Salesforce add-in, which provides the Outlook and Gmail integration base features and Inbox features is built on the trusted Salesforce platform. That platform brings you the security you trust with Salesforce and the side panel is customizable using Lightning App Builder to better meet your users needs.

Available in: Lightning Experience

Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance,** and **Unlimited** Editions

All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

Feature	Legacy Inbox	Outlook Integration with Inbox	Gmail Integration with Inbox
Support for personal Gmail accounts	✓	N/A	✗ (Requires a G-Suite email account)
Support for shared folders (delegate access)	✗	✓	✗
Customize the layout and features that reps see using Lightning App Builder (admins only)	✗	✓	✓
Add Lightning components, including AppExchange components to the side panel (admins only)	✗	✓	✓
Choose favorite objects	✓	✗ (Admin determines objects available in the related list)	✗ (Admin determines objects available in the related list)
Log emails to Salesforce records	✓	✓ (To multiple people records and one other record)	✓ (To multiple people records and one other record)

Feature	Legacy Inbox	Outlook Integration with Inbox	Gmail Integration with Inbox
Use email templates	✓	✓ (HTML and Lightning Experience templates)	✓ (HTML and Lightning Experience templates)
Send mass emails*	✓	✗ (Use Lightning list emails instead)	✗ (Use Lightning list emails instead)
Log calendar events to Salesforce and identify the event type	✗	✓	✓
Log emails and events to Salesforce records created from custom objects	✓	✓	✓
Create Salesforce contacts, leads, and opportunities	✓	✓	✓
Create Salesforce cases	✓	✓	✓
Create Salesforce records for other standard objects, such as accounts	✗	✓ (Add quick actions to the publisher layout)	✓ (Add quick actions to the publisher layout)
Create Salesforce records for custom objects	✗	✓ (Add quick actions to the publisher layout)	✓ (Add quick actions to the publisher layout)
Insert available times for meetings and schedule meetings on behalf of a colleague	✓	✓ (Localized and accessibility compliant)	✓ (Localized and accessibility compliant)
Schedule emails to send later	✓	✓	✓
View, edit, and create text shortcuts	✓	✓ (Integrated with Lightning Quick Text)	✓ (Integrated with Lightning Quick Text)
Know when recipients open emails	✓	✓ (Also available in the email record and Sales Engagement)	✓ (Also available in the email record and Sales Engagement)
Know when recipients click links in emails	✓	✓	✓

Feature	Legacy Inbox	Outlook Integration with Inbox	Gmail Integration with Inbox
Push phone number to phone	✓	✗	✗
Receive follow-up reminders if you've received no reply	✓	✓ (Via native Outlook features)	✓ (Via native Outlook features)
Receive Google Chrome desktop notifications	✓	N/A	N/A
Support for Einstein Activity Capture	✓	✓	✓

\*List emails sent from legacy versions of Inbox don't migrate to Lightning list emails.

Move Reps from Legacy Salesforce Inbox to the Outlook or Gmail Integration with Inbox

The integration with Microsoft® Outlook® and with Gmail™ with Inbox help increase productivity while composing emails. If your sales reps are using older versions of Salesforce Inbox on a desktop, you can easily move reps to the new version.

Available in: Lightning Experience

Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance,** and **Unlimited** Editions

All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

Salesforce admins use these steps if reps are running the legacy Salesforce Inbox in Outlook or Gmail and are moving to the Outlook or Gmail integration with Inbox. Sales reps can also run Inbox on iOS and Android using a standalone application and access some Inbox features in Lightning Email. This setup doesn't affect Inbox features in Lightning Email.

 **Note:** Reps can't run legacy Inbox versions at the same time as the new version. Reps must either disable or remove the legacy Inbox application before running the new one.

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

#### 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 Lightning App Builder:

- View Setup and Configuration

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, you can create one or more custom panes.

 **Tip:** Use the **With Inbox Features** option to start your custom design. Then, remove the features that you don't need from the default email application pane.

7. Activate the email application pane, and assign it to the appropriate user profiles.
8. Have your sales reps remove the legacy Salesforce Inbox Outlook add-in from Outlook or the extension from Chrome. If your reps use Outlook, the Exchange Admin can remove the add-in from the Microsoft Exchange Admin Console or Exchange admin center.
9. Have your sales reps add Salesforce from the Microsoft AppSource or Chrome Web Store. If you use Outlook, the Exchange Admin can centrally deploy the add-in from the Microsoft Exchange Admin Center.

 **Tip:** After adding the extension, updates from Salesforce occur automatically.

#### SEE ALSO:

[External Link: Get an Office Add-in for Outlook](#)

[External Link: Install and manage extensions](#)

[Customize the Email Application Pane for Outlook and Gmail](#)

[Set Up Inbox](#)

#### Tips for Working in the Gmail Integration with Inbox

If your company is moving from the legacy Salesforce Inbox Chrome extension to the Gmail integration with Inbox, review the differences between the two solutions for a smooth transition.

Available in: Lightning Experience

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Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance, and Unlimited** Editions

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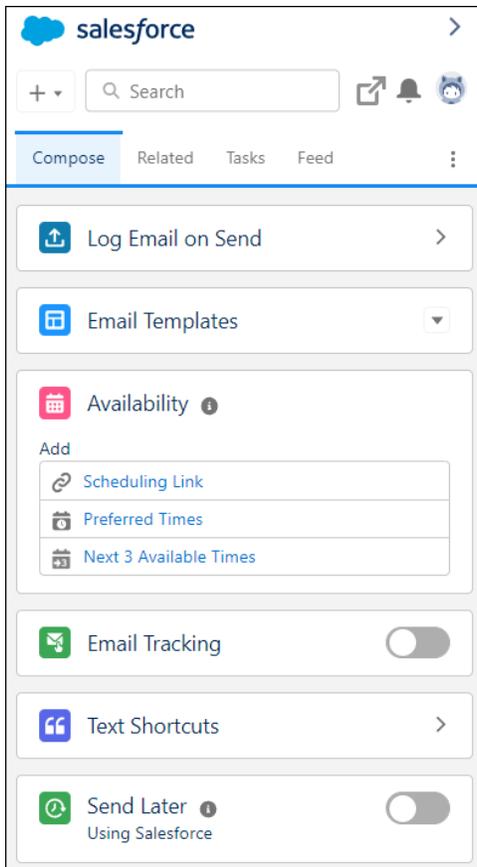
All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

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#### Salesforce Inbox Productivity Tools

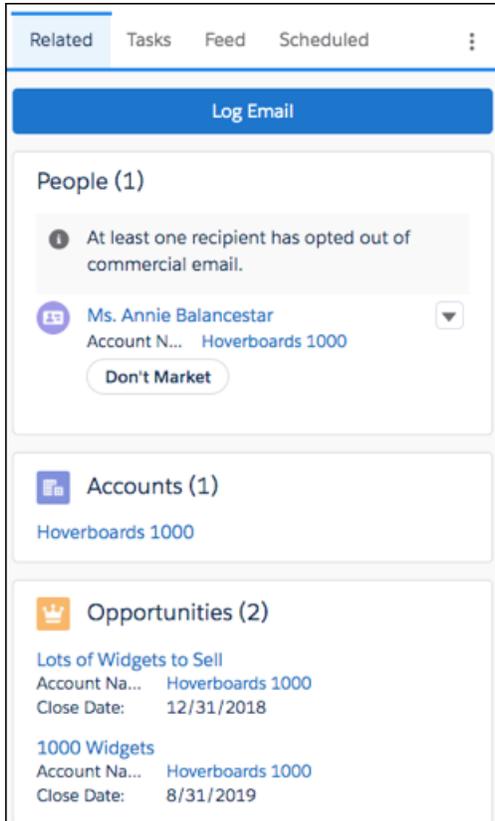
All Salesforce Inbox tools are available in the side panel, and not in a separate toolbar. Your Salesforce admin determines which tools are available in your integration. The tools that are available depend on the action you're taking in your email.

When you're composing an email, the side panel includes the Compose tab.

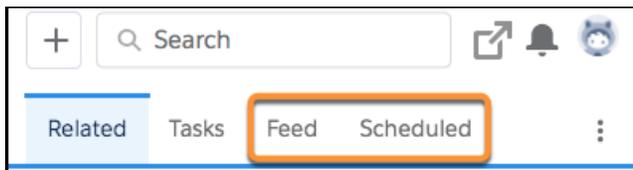


The Compose tab includes options to insert your availability, track an email (called Read Receipts in legacy versions of Inbox), schedule emails to send later, and to insert text shortcuts. You also have access to insert and create email templates.

When you're reading an email, the integration panel includes the Related tab. The Related tab contains the Salesforce records related to the email you're reading.



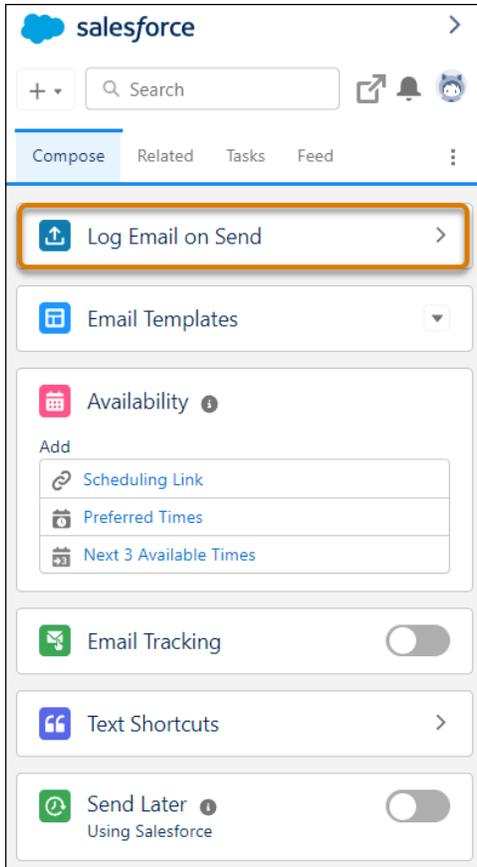
At any time, view emails scheduled to send later in the Scheduled tab, and view email tracking information in the Feed tab.



If your Salesforce admin has customized the email application pane, these tabs could have different and show in a different order.

### Email Logging

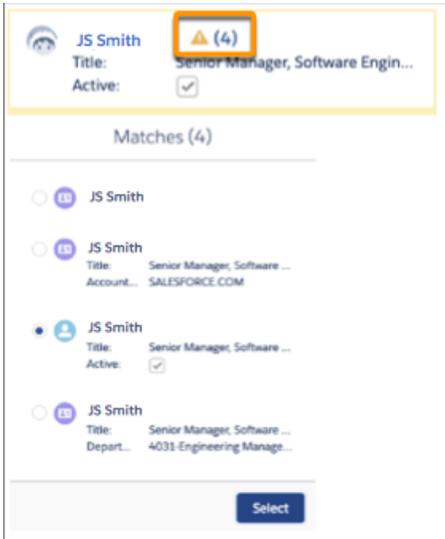
There are multiple ways to log an email to Salesforce records. When you're composing an email, use the Log Email on Send option to select which records to log an email to when it's sent. Be sure to save your selections in the integration pane before sending your email. The email is logged to the selected records after it's sent.



Or, use the reminder to log prompt to select records to log your email to after it's sent. To disable the prompt, select **Log Email on Send** in the integration pane, and deselect the **Always remind me to log** option at the bottom of the pane.

### Related Records

In the legacy Salesforce Inbox Chrome extension, you could hide internal records from appearing as related records using the Hide Internal Records setting. In the Gmail integration, to make the list of related records more relevant, resolve the email addresses related to those records. The integration remembers your choices over time and your preferences across many objects. For example, click the number with the yellow triangle. The integration shows all possible matches for that email address. Select the record you want the integration to remember as the default record for that email address, and click **Select** to save your preference.



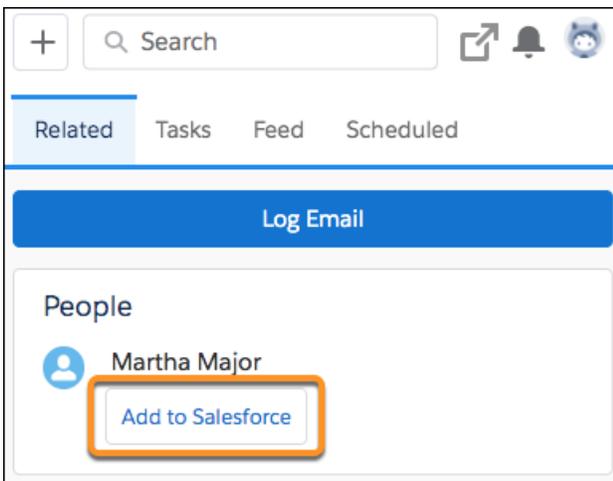
After you select the record you want the integration to remember, the panel shows all other related objects depending on your selection. For example, related opportunities and accounts.

### Favorite Objects

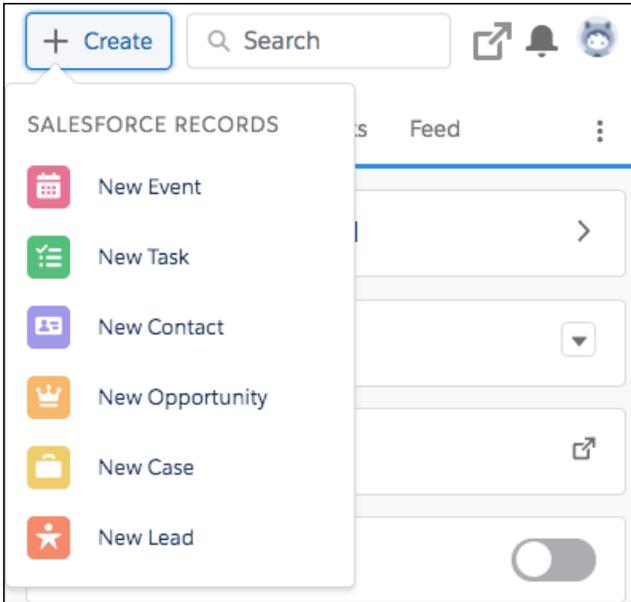
You can't identify objects as favorites in the Gmail Integration. Use the search to find other records to log an email to. If you can't find an object that you used in the past, contact your Salesforce admin.

### Add Salesforce Records

The integration recognizes email addresses that don't match a record in Salesforce when viewing or composing an email. Add those people to Salesforce as a new contact or lead.



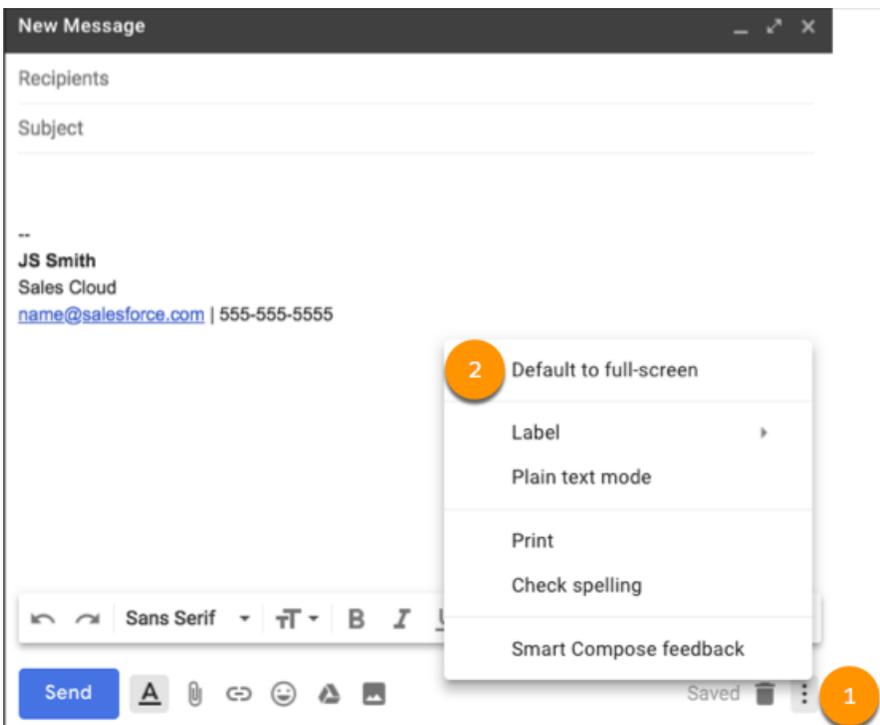
You can also create records at any time using the add option in the navigation bar.



If you don't see an object type in this list, ask your Salesforce admin to add the object type to the Email Publisher Layout.

### Gmail Full-Screen Compose Mode

The Gmail integration is supported in Compose mode when using the smaller, compose window, not in the full-screen compose window.



To set Gmail to default to the smaller, window, select the **Compose settings** (1), and then deselect **Default to full-screen** (2).

SEE ALSO:

[Use the Outlook and Gmail Integrations](#)

[Video: Connecting Gmail with Salesforce \(English Only\)](#)

#### Tips for Working in the Outlook Integration with Inbox

If your company is moving from the legacy Salesforce Inbox Outlook add-in to the Outlook integration with Inbox, review the differences between the two solutions for a smooth transition.

Available in: Lightning Experience

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Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance, and Unlimited Editions**

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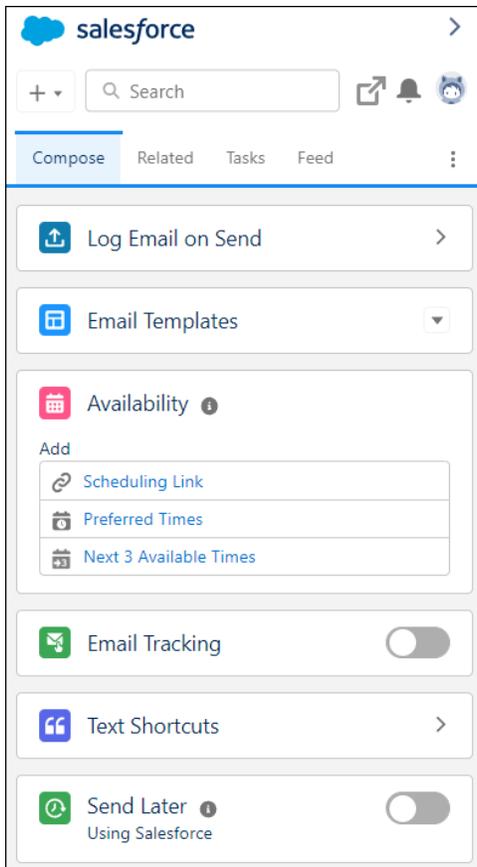
All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

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#### Salesforce Inbox Productivity Tools

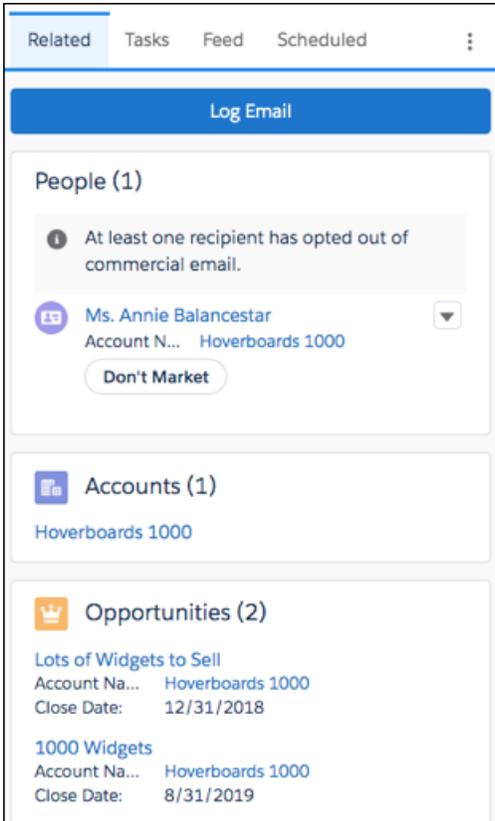
All Salesforce Inbox tools are available in the side panel, and not in a separate toolbar. Your Salesforce admin determines which tools are available in your integration. The tools that are available depend on the action you're taking in your email.

When you're composing an email, the side panel includes the Compose tab.

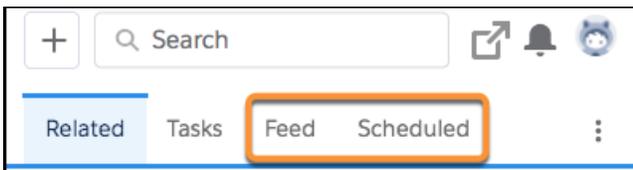


The Compose tab includes options to insert your availability, track an email (called Read Receipts in legacy versions of Inbox), schedule emails to send later, and to insert text shortcuts. You also have access to insert and create email templates.

When you're reading an email, the integration panel includes the Related tab. The Related tab contains the Salesforce records related to the email you're reading.



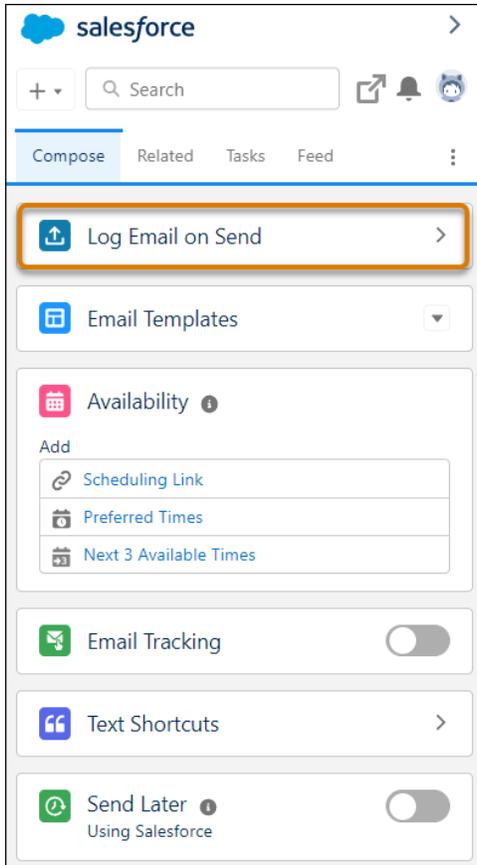
At any time, view emails scheduled to send later in the Scheduled tab, and view email tracking information in the Feed tab.



If your Salesforce admin has customized the email application pane, these tabs could have different and show in a different order.

### Log Emails and Events

When you're composing an email, use the Log Email on Send option to select which records to log an email to when it's sent. Be sure to save your selections in the integration pane before sending your email. The email is logged to the selected records after it's sent.



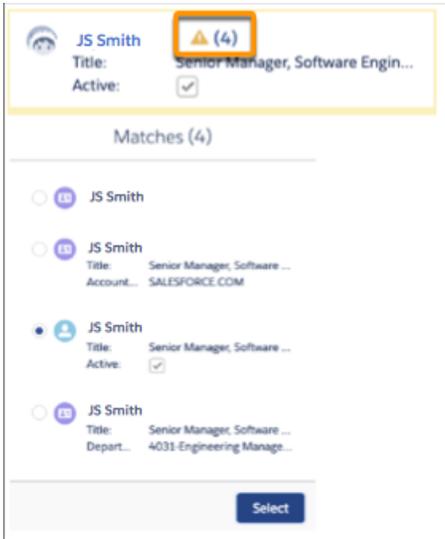
When you're reading an email, use the Pick Records button in the Related tab and select which records to log the email to. Or, if you like the records Salesforce suggested, click **Log Now**.

When you're organizing an event, create the event and save it in your Outlook calendar. You can log the event to Salesforce records after the event is saved.

### Related Records

In the legacy Salesforce Inbox Chrome extension, you could hide internal records from appearing as related records using the Hide Internal Records setting. In the Outlook integration, make the list of related records more relevant by resolving the email addresses related to those records.

The integration remembers your choices over time and your preferences across many objects. For example, click the number with the yellow triangle. The integration shows all possible matches for that email address. Select the record you want the integration to remember as the default record for that email address, and click **Select** to save your preference.

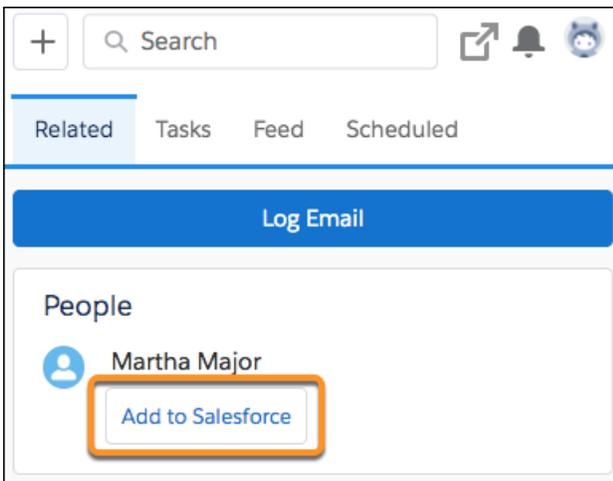


### Favorite Objects

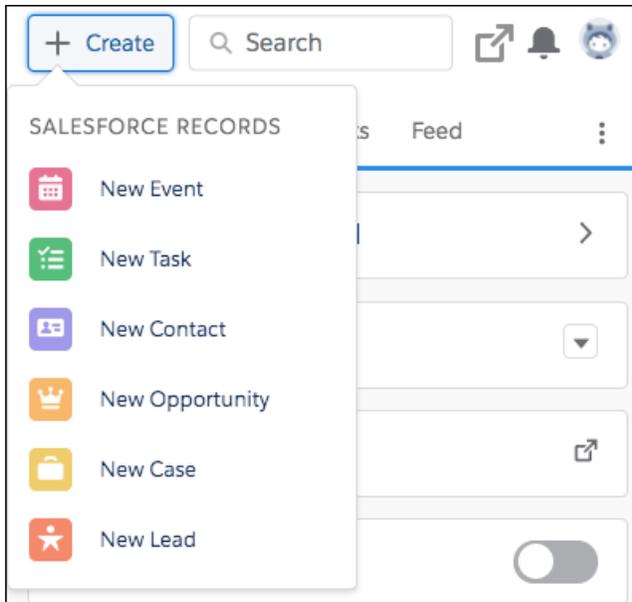
You can't identify objects as favorites in the Outlook integration. Use the search to find other records to log an email to. If you can't find an object that you used in the past, contact your Salesforce admin.

### Add Salesforce Records

The integration recognizes email addresses that don't match a record in Salesforce when viewing or composing an email. Add those people to Salesforce as a new contact or lead.



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



If you don't see an object type in this list, ask your Salesforce admin to add the object type to the Email Publisher Layout.

## Use the Outlook and Gmail Integrations

Increase your productivity and work smarter and faster without leaving your email application. With the integration to Salesforce, see relevant Salesforce records in Outlook® and Gmail™, and relate email messages to Salesforce, keeping your teammates up-to-date with your communications.

### [Get the Outlook Integration](#)

To use the integration, each Outlook user needs the Salesforce add-in for Microsoft Outlook. How you get the add-in is up to your Salesforce admin and your IT department. After the add-in is installed, launch it in Outlook, connect your email account, and then manage the add-in like you do other Microsoft add-ins.

### [Get the Gmail Integration](#)

To start using the integration with Gmail™, get the Salesforce extension from the Chrome Web Store and connect your email account.

### [Outlook and Gmail Integration Tour](#)

The integration appears as a side panel next to an open email or event in your email.

### [Considerations for Outlook Shared Folders in Outlook Integration](#)

Sales reps can log emails and events to Salesforce from Outlook shared folders. For example, someone delegates access to their inbox or calendar to a teammate, or a group uses a shared email address such as info@company.com. Review the considerations about how the Outlook integration features work in shared folders.

### [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 integration to Microsoft® Outlook® and Gmail™ also ensures consistent messaging from your team to your customers.

### 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**

### [View and Work with Salesforce Data in Outlook and Gmail](#)

With the integration, you can access Salesforce data from an email and create Salesforce records without leaving your email application. Staying in the email application saves you time and helps ensure that Salesforce is up to date with the latest communications.

### [Outlook and Gmail with Inbox Productivity Features](#)

If you have an Inbox license, you have productivity tools available while composing emails. Use the tools to work even faster and smarter while communicating with your customers and prospects.

#### SEE ALSO:

[Pin the Salesforce Panel in Outlook Desktop So It's Always Open](#)

## Get the Outlook Integration

To use the integration, each Outlook user needs the Salesforce add-in for Microsoft Outlook. How you get the add-in is up to your Salesforce admin and your IT department. After the add-in is installed, launch it in Outlook, connect your email account, and then manage the add-in like you do other Microsoft add-ins.

-  **Note:** We recommend that your IT department deploys the Salesforce add-in for you. However, if you can access the Microsoft AppSource store, you can install the [Salesforce add-in](#) yourself. If you don't see the Salesforce icon in the Outlook desktop ribbon or as an option in Outlook on the web, install the Salesforce add-in from the store. If you can't access the store, contact your IT department to install the add-in for you.

To learn more about launching and managing the Salesforce add-in from your version of Outlook, see the following Microsoft documentation.

- [Desktop versions of Outlook](#)
- [Outlook on the web](#)

#### SEE ALSO:

*External link:* [Salesforce add-in in the Microsoft AppSource store](#)

*Video:* [Work with Salesforce in Outlook, Gmail, and Google Calendar \(English Only\)](#)

## Get the Gmail Integration

To start using the integration with Gmail™, get the Salesforce extension from the Chrome Web Store and connect your email account.

Complete these steps to the integration to the Chrome browser.

-  **Tip:** The extension automatically updates with each Salesforce release. There's no need to get a new version of the extension when a new Salesforce release is available.
1. In the [Chrome Web Store](#), enter *Salesforce* in the *Search* box, then select the **Salesforce** extension.

### EDITIONS

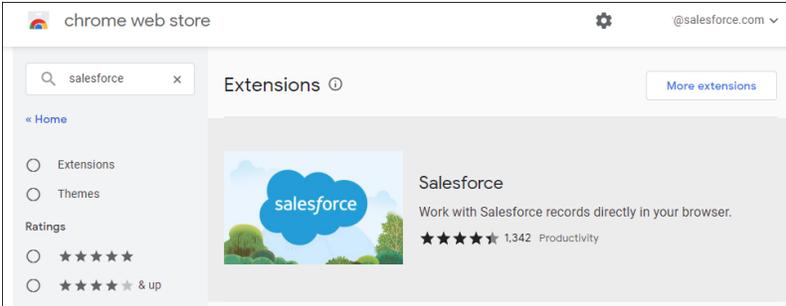
Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

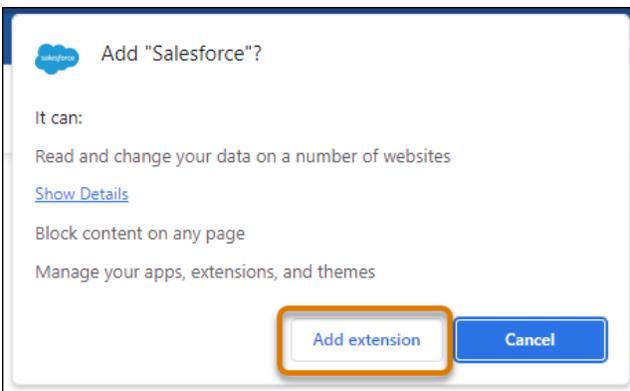
Available with Sales Cloud, Service Cloud, and Lightning Platform in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions



2. Click the icon, click **Add to Chrome**.



3. Click **Add extension** to add it to your Gmail account.



4. After adding the extension to Chrome and navigating to Gmail, enter your Salesforce credentials in the new integration pane.

 **Tip:** For a better viewing experience, we recommend that you turn off Gmail's People widget. For more support, visit Google's support website.

SEE ALSO:

[Turn On the Gmail Integration in Salesforce](#)

[Video: Work with Salesforce in Outlook, Gmail, and Google Calendar \(English Only\)](#)

## Outlook and Gmail Integration Tour

The integration appears as a side panel next to an open email or event in your email.

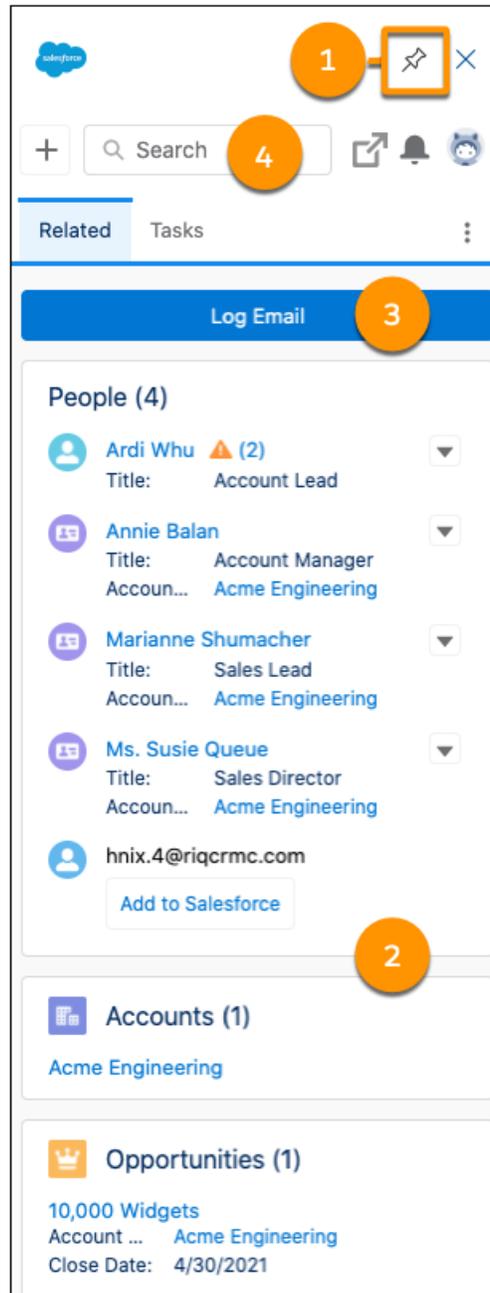
- ▶ [Connecting to Salesforce in Outlook \(English Only\)](#)
- ▶ [Connecting to Salesforce in Gmail \(English Only\)](#)

To access the integration side panel, click . In desktop versions of Outlook, the icon is available in the Ribbon. In Outlook on the web, find the icon in the toolbar on open emails and events. In Gmail, the icon is next to your email inbox or calendar along with other extensions.

### 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



In Outlook, to keep the panel open as you move through your email, click the pin icon (1). The pin option is available in Outlook 2016 on Windows that is installed using Click-to-Run with build 7900 or later, later versions of Outlook, and in Outlook on the web. In Gmail, the pane stays open until you close it.

The side panel updates to show Salesforce records, such as accounts, opportunities, contacts, and leads that match an address in the open email or event (2). Your Salesforce admin determines the components available in the integration, but it typically includes a place to view the people associated with an email, related accounts, and opportunities. To view more details, such as Chatter feeds, the activity timeline, and related lists, select a matching record. You can also edit record details directly in the pane. The content and fields available to you in the record details are based on access permissions in Salesforce. To keep Salesforce up to date, log the email or event to a matching record (3). Select the records to log the email or event to before saving.

When you're composing an email, the content and components in the integration pane change to include components such as email templates.

Use the navigation bar in the integration pane to create Salesforce records, search for records, launch Salesforce for more information, and to view notifications (4).

#### SEE ALSO:

[Outlook and Gmail Integration](#)

[Outlook Integration System Requirements](#)

[Gmail Integration System Requirements](#)

[Explore Email and Calendar Integration Products](#)

[Considerations for Running Outlook Integration and Salesforce for Outlook \(Retiring\) Simultaneously](#)

[Outlook and Gmail Integration](#)

## Considerations for Outlook Shared Folders in Outlook Integration

Sales reps can log emails and events to Salesforce from Outlook shared folders. For example, someone delegates access to their inbox or calendar to a teammate, or a group uses a shared email address such as info@company.com. Review the considerations about how the Outlook integration features work in shared folders.

 **Note:** Only shared folders, which provide delegate access to an inbox or calendar, are supported. Outlook shared mailboxes aren't supported in Microsoft add-ins.

### Supported Environments

Work with your IT pro to determine if your company and your email account are set up correctly. Shared folder support is available if you meet the following requirements:

- You use Exchange Online (build 15.20.3283.23 or later)
- You use one of the following email clients:
  - Microsoft 365 (also called Office 365) subscription version 1910 (build 12130.20272) or later
  - Office 2019 one-time purchase (retail) with a build version 1910 (build 12130.20272) or later
  - Outlook on the web

 **Note:** Integration features for shared folders aren't supported in Outlook on Mac.

- You're a member of the shared folder with full access and that auto-mapping is enabled for your email account.
- Enhanced Email is enabled in Salesforce.

### Outlook Integration Features

Keep these considerations in mind when using the Outlook integration features from a shared folder:

- Logging emails and events from a shared inbox or calendar, uses your Salesforce user. For example, your Salesforce user is Martha Major, and you log an email from info@company.com. The Activity Timeline shows that Martha Major logged the email, not info@company.com.
- Logging contact information files (.vcf) and XML files isn't supported.

#### 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**

- To use the Log Email on Send feature from the shared folder, add the shared address to your My Acceptable Email Addresses list in Salesforce. Find that list in My Email to Salesforce in your personal settings in Salesforce.
- When you send an email from a shared folder, the available email templates are the templates available to your Salesforce user. If multiple users need access to the same email template from a shared address, make sure that the template is public or shared with those users.

## Outlook Integration with Inbox Features

Inbox features including Availability, Send Later, Email Tracking, and Text Shortcuts, are available to user from a shared folder. However, the features use your primary email address or calendar account, not the shared email address or calendar.

For example, if you're composing an email from a shared folder's inbox or calendar or on behalf of someone else:

- When you use insert availability, your calendar appears, not the shared calendar.
- When you schedule an email to send later from a shared folder, the draft is saved in the Drafts folder of your email account. It's not saved to the Drafts folder in the shared folder. The list of scheduled emails in the Scheduled tab shows the emails that you scheduled. It doesn't include emails that others using the shared folder scheduled. However, when the email is sent, it sends from the shared email account.
- Email engagements show in your email tracking feed, not in the feed in the shared folder.
- Text shortcuts available to insert into an email are your shortcuts. You can't access another users' shortcuts.

## How Event Owner Matching Works

When a delegate logs an event on a delegator's calendar, the Outlook integration uses the email of the delegator's calendar to search for the delegator's Salesforce user. If a match is found, the Outlook integration assigns the logged event to that user as the event owner and organizer. And if the delegate is going to the event, they're added to the event as an attendee.

If no match is found, the integration assigns the logged event to the delegate.

If the delegate is an event attendee, the integration automatically adds the delegate to the event.

## Sales Engagement Work Queue

Your primary email address is used when you compose an email from the Sales Engagement Work Queue in the integration. If you change the From address to a shared address, some Sales Engagement features, such as advancing the cadence, don't work correctly.

### SEE ALSO:

[Set Up Email to Salesforce](#)

[Enhanced Email and the Outlook Integration](#)

*External link:* [Allow someone else to manage your mail and calendar](#)

*External link:* [Outlook add-ins overview](#)

## 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 integration to Microsoft® Outlook® and Gmail™ also ensures consistent messaging from your team to your customers.

 **Tip:** Reps can also save an email they're composing as a template directly from Outlook and Gmail. However, if they want to include an attachment or image as part of the template, create the template in Salesforce.

### Use Lightning Email Templates in Microsoft Outlook and Gmail

Use Lightning email templates with the integration with Microsoft® Outlook® or 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 while composing email messages in 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 the Outlook and Gmail integrations. 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.

## Use Lightning Email Templates in Microsoft Outlook and Gmail

Use Lightning email templates with the integration with Microsoft® Outlook® or 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 while composing email messages in your email application. You can also create your own Lightning email template from email messages you craft.

 **Note:** Attachments in email templates, including inline images, aren't supported in the Outlook and Gmail integrations. If you insert an email template that contains an attachment, the body of the template is inserted in the email. However, the attachment isn't included.

### 1. Create a template in Lightning Experience.

 **Tip:** Reps can also save an email they're composing as a template directly from Outlook and Gmail. However, if they want to include an attachment or image 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: Salesforce Classic and Lightning Experience

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

### 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 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 the Outlook and Gmail integrations. 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.

 **Note:** Attachments in email templates aren't supported in the Outlook and Gmail integrations. If you insert an email template that contains an attachment, the body of the template is inserted in the email. However, the attachment isn't included.

1. Create a Salesforce Classic template in text, HTML, or custom format.

 **Tip:** Reps can also save an email they're composing as a template directly from Outlook and Gmail. However, if they want to include an attachment or image 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.

## View and Work with Salesforce Data in Outlook and Gmail

With the integration, you can access Salesforce data from an email and create Salesforce records without leaving your email application. Staying in the email application saves you time and helps ensure that Salesforce is up to date with the latest communications.

### [Guidelines for Logging Email from Outlook and Gmail to Salesforce](#)

Keep your opportunities moving and your teammates up to date with your latest communications. Log email messages to Salesforce people, contacts, leads, and other records.

### [Guidelines for Logging Events from Outlook and Gmail to Salesforce](#)

Log your calendar events from Outlook or Google Calendar to Salesforce contacts, leads, and other records.

### [Create Salesforce Records from Outlook and Gmail](#)

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 the prospect to Salesforce, or you want to capture a new task. Add the records to Salesforce without leaving your email.

### SEE ALSO:

[How Salesforce Records Are Matched to Emails and Events](#)

### 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 create email templates

- Send Email

To update email templates

- Modify All Data or template ownership

### 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**

## Guidelines for Logging Email from Outlook and Gmail to Salesforce

Keep your opportunities moving and your teammates up to date with your latest communications. Log email messages to Salesforce people, contacts, leads, and other records.

Inbound 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

The screenshot displays the 'Log Email' interface in Salesforce. At the top, there are tabs for 'Related' and 'Tasks'. The main section is titled 'Log Email' and includes the following elements:

- Related To:** None
- People:** Sophia Zhang
- Attachments:** 1/1 Attachment(s) Included
- Buttons:** 'Log Now' (highlighted with a red circle '1') and 'Pick Records' (highlighted with a red circle '2').
- People (1):** A list of people associated with the email, including Sophia Zhang and Kshitij Gupta, with an 'Add to Salesforce' button.
- Opportunities (2):** A list of opportunities, including 'salesforce.com - 1,000 Widgets' and 'salesforce.com - 2,000 Widgets', with their respective account names and close dates.

When suggested objects are found, Salesforce proposes which people and records to associate the email with. If you agree with the suggestions, click **Log Now**. To choose your own associations click **Pick Record** and select the records that you want to relate the email or event to in Salesforce. You can also log the email to one other record type, such as an account or opportunity.

 **Note:** The integration shows up to 15 contacts or leads in the side panel. If there are more than 15 recipients in an email, not all the recipients are available in the list.

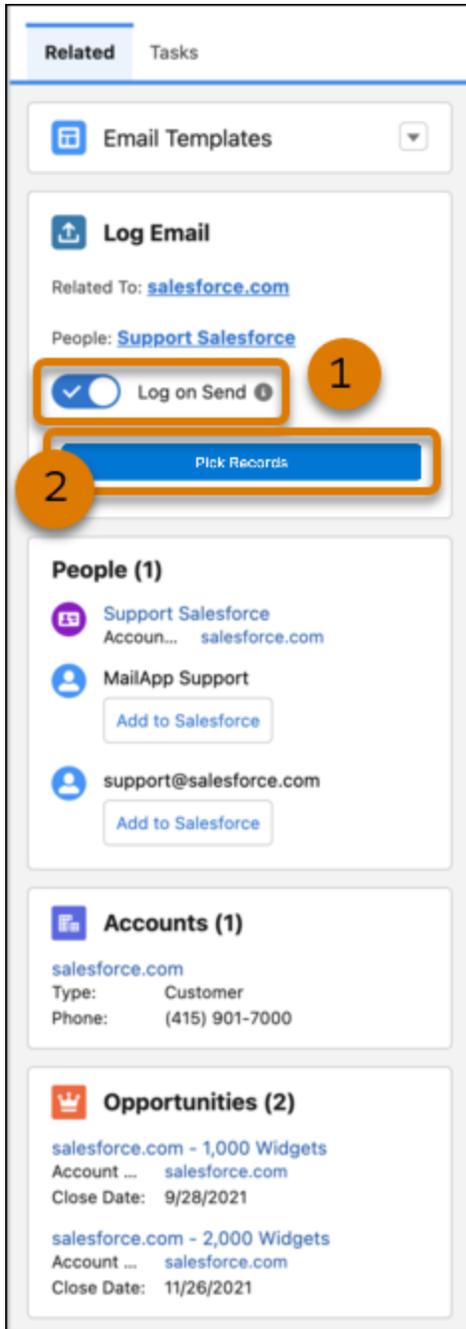
To log the email to other records that don't show in the related records list, use Search.

 **Tip:** To see the email logging options first when you select an email, turn on **Log Emails Faster**. Then, as you move through your email, the email logging options appear automatically and clicking **Log Email** isn't necessary.

Sorting options for recommendations vary depending on the object. For example, the contact and lead suggestions begin with any matched contacts or leads, and then recipients who didn't match a record. For lists of suggested users, standard users are listed first, followed by contacts, leads, and other people records such as community users.

### Outbound Email

When composing an email, select **Log on Send** (1). When suggested objects are found, Salesforce proposes which people and records to associate the email with when it's sent. To make changes, click **Pick Records** (2) and add or remove people and other records before sending the email.



 **Note:** When using Log Email on Send in Outlook, the “Related to Salesforce” category isn’t automatically added to the email.

### Logging Email Attachments

Email attachments are added as files in Salesforce. Your Salesforce setup determines where you can find the attachments. When emails are logged as tasks, attachments are available in the Files section of the Salesforce Email page layout. When emails are logged as email messages, find the files in the Attachments section of the Salesforce email. If you’re not sure how emails are logged, check with your Salesforce admin.

The Log Email on Send page in the integration doesn't have an option to include attachments like the log email page for reading email does. To log attachments automatically when using Log Email on Send, click the **Always save email attachments** setting in your My Email to Salesforce settings. If this option isn't selected, attachments in emails sent using Log Email on Send aren't automatically included with the logged email. To log email attachments manually from emails in your Sent folder, select the **Include Attachments** option.

#### Logging Emails from Shared Folders (Outlook Only)

In Outlook, you can log email to Salesforce from a shared folder such as info@company.com. On the Salesforce record, the logged email event indicates it was logged from your Salesforce user, not from the shared folder.

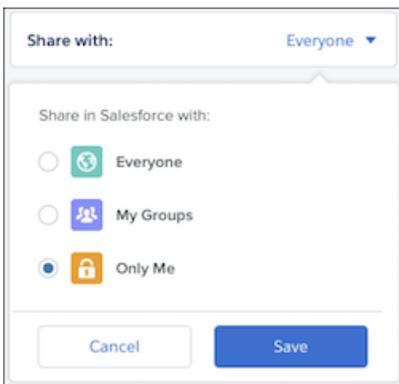
#### Logging Fields and Statuses

When you log an email from your inbox, it's logged as Read. When you log an outbound email, it's logged to the selected Salesforce records as Sent. Outbound emails include emails logged from the Sent folder, the Log Email on Send option, or from the Reminder to Log pane.

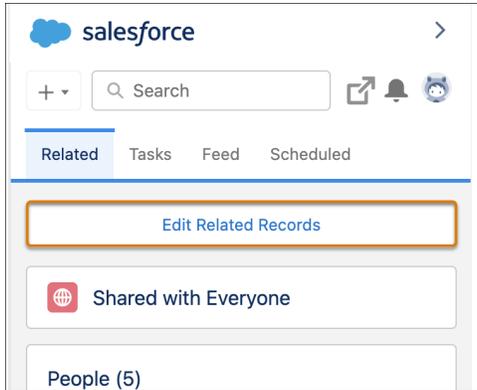
If an email contains multiple addresses, the first matching alphabetical contact is included as the name on the activity on the Salesforce record.

#### Sharing Emails with Einstein Activity Capture

If you have a Share option instead of a Log Email option, you're set up to use Einstein Activity Capture. Einstein Activity Capture automatically logs emails and events to related Salesforce records.



If you're part of an Einstein Activity Capture configuration that is set to automatically capture emails, you can't manually log emails or events from the integration. However, you can click **Edit Related Records** to update the automatically created relationships between the email and Salesforce records from Outlook and Gmail.



Your Activity Sharing settings determine whether emails and events are shared with other users or kept private. You can update your default sharing setting in your personal settings in Salesforce.

#### SEE ALSO:

[Einstein Activity Capture](#)

[Control How Activities Added by Einstein Activity Capture Are Shared](#)

[How Salesforce Records Are Matched to Emails and Events](#)

[Considerations for Outlook Shared Folders in Outlook Integration](#)

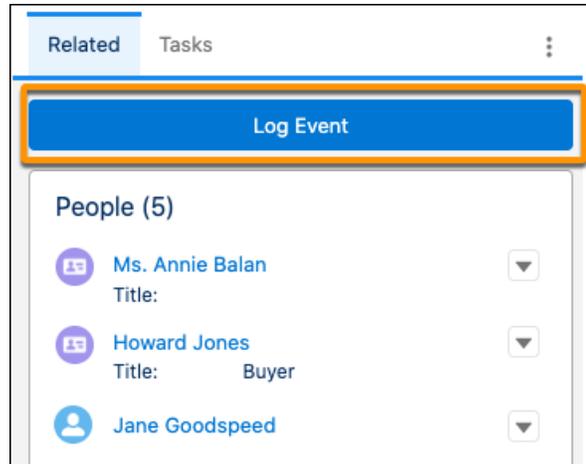
## Guidelines for Logging Events from Outlook and Gmail to Salesforce

Log your calendar events from Outlook or Google Calendar to Salesforce contacts, leads, and other records.

### 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



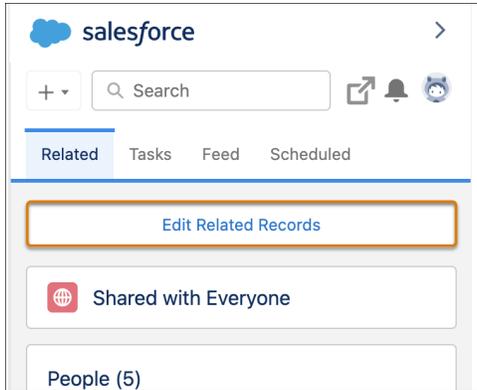
The integration shows up to 15 matching records in the side panel. Depending on your system configuration, you can log an event to up to 50 contacts or 1 lead, even if the list only shows 15 matches. If you're able to log an event to only one contact, ask your Salesforce admin about enabling Shared Activities. You can also log the event to one other record, such as an account or opportunity.

Keep these other considerations in mind when logging events.

- For events you're creating, save the event first, and then log it to Salesforce.
- You can log only nonrecurring, public events.
- The matching contacts are automatically selected when you click Log Event. You can unselect all contacts or individual contacts before logging the event.
- Users with a matching email address on the event are included in the related records list. However, you can't log events to user records from the integration.
- The event is logged to the selected records, and an event record is created in Salesforce. Attendees who are also Salesforce records (such as Contacts) are included as attendees in the event record. The event attendees' RSVP statuses and the event attachments aren't included or logged.
- All attendees see the same invite on their Salesforce calendar.
- If the title changes after the event is logged, the information in the event record in Salesforce doesn't update automatically. Either edit the event record in Salesforce to reflect the change or log the event again.
- If the list of matching records shows the maximum 15 records, you can still search for other records to log the event to. The list still shows only 15 records. However, any record that was selected before you searched is included when you log the event.

### Syncing Events with Einstein Activity Capture

If you're part of an Einstein Activity Capture configuration that's set to sync events, you don't have the option to manually log the event. However, you can update the automatically created relationships between the event and Salesforce records from Outlook and Gmail.



Your Activity Sharing settings determine whether events are shared with other users or kept private. You can update your default sharing setting in your personal settings in Salesforce. Ask your Salesforce admin for more information about your Einstein Activity Capture configuration.

#### SEE ALSO:

[Control How Activities Added by Einstein Activity Capture Are Shared](#)

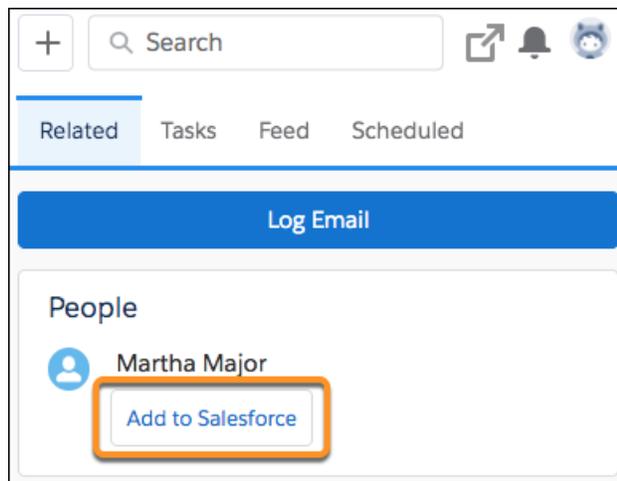
[Preparing to Sync Events with Einstein Activity Capture](#)

[Considerations for Outlook Shared Folders in Outlook Integration](#)

## Create Salesforce Records from Outlook and Gmail

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 the prospect to Salesforce, or you want to capture a new task. Add the records to Salesforce without leaving your email.

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



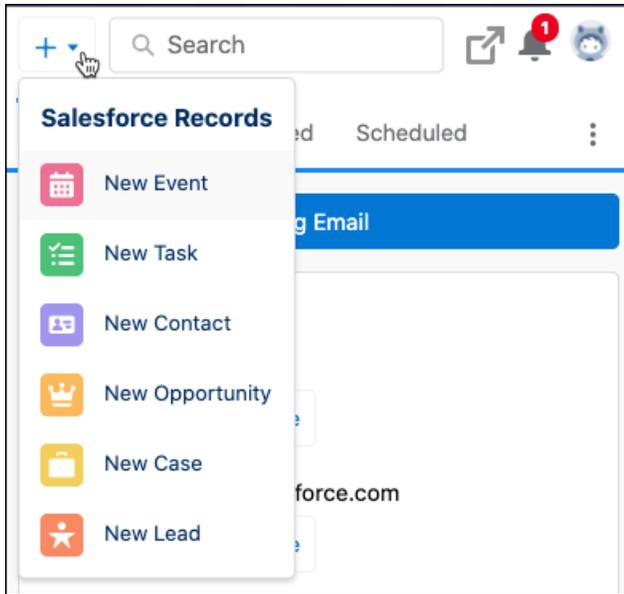
 **Note:** The integration shows up to 15 contacts or leads in the side panel. If there are more than 15 recipients in an email, not all the recipients are available in the list.

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

#### 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



**Tip:** When you create a contact or lead, the first name, last name, and email address populate with information from the sender's email address in the open email. If the sender's email domain matches a company in Salesforce, the company name is also populated. When you create a task or case, additional information, such as the subject and description, are populated with information from the open email.

## Outlook and Gmail with Inbox Productivity Features

If you have an Inbox license, you have productivity tools available while composing emails. Use the tools to work even faster and smarter while communicating with your customers and prospects.

Available in: Lightning Experience

Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance, and Unlimited** Editions

All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

### [Do More While Composing Emails in Outlook and Gmail](#)

If your Salesforce admin has enabled Inbox, you've one or more productivity tools available while composing emails. Your Salesforce admin determines which tools are available in your integration.

### [Considerations for Scheduling Events with Insert Availability in the Outlook and Gmail Integrations with Inbox](#)

To avoid back-and-forth emails when scheduling events, insert open time slots from your calendar directly in an email. Recipients can select which time works best, and the event is automatically scheduled. Review the considerations about inserting availability.

### [Guidelines for Tracking Emails in the Outlook and Gmail Integrations with Inbox](#)

When Inbox features are added to the integration Outlook or Gmail, sales reps can track when recipients open emails and click links in emails. Before you enable email tracking for your sales reps, review these key considerations about setup and how emails are tracked.

### [Engagements and Alerts in the Outlook and Gmail Integrations with Inbox](#)

The Feed tab in the integration provides a comprehensive look at how your customers and prospects engage with the emails that you send. The feed includes information such as replies to emails sent from across Salesforce, not just from Outlook or Gmail.

## Do More While Composing Emails in Outlook and Gmail

If your Salesforce admin has enabled Inbox, you've one or more productivity tools available while composing emails. Your Salesforce admin determines which tools are available in your integration.

Available in: Lightning Experience

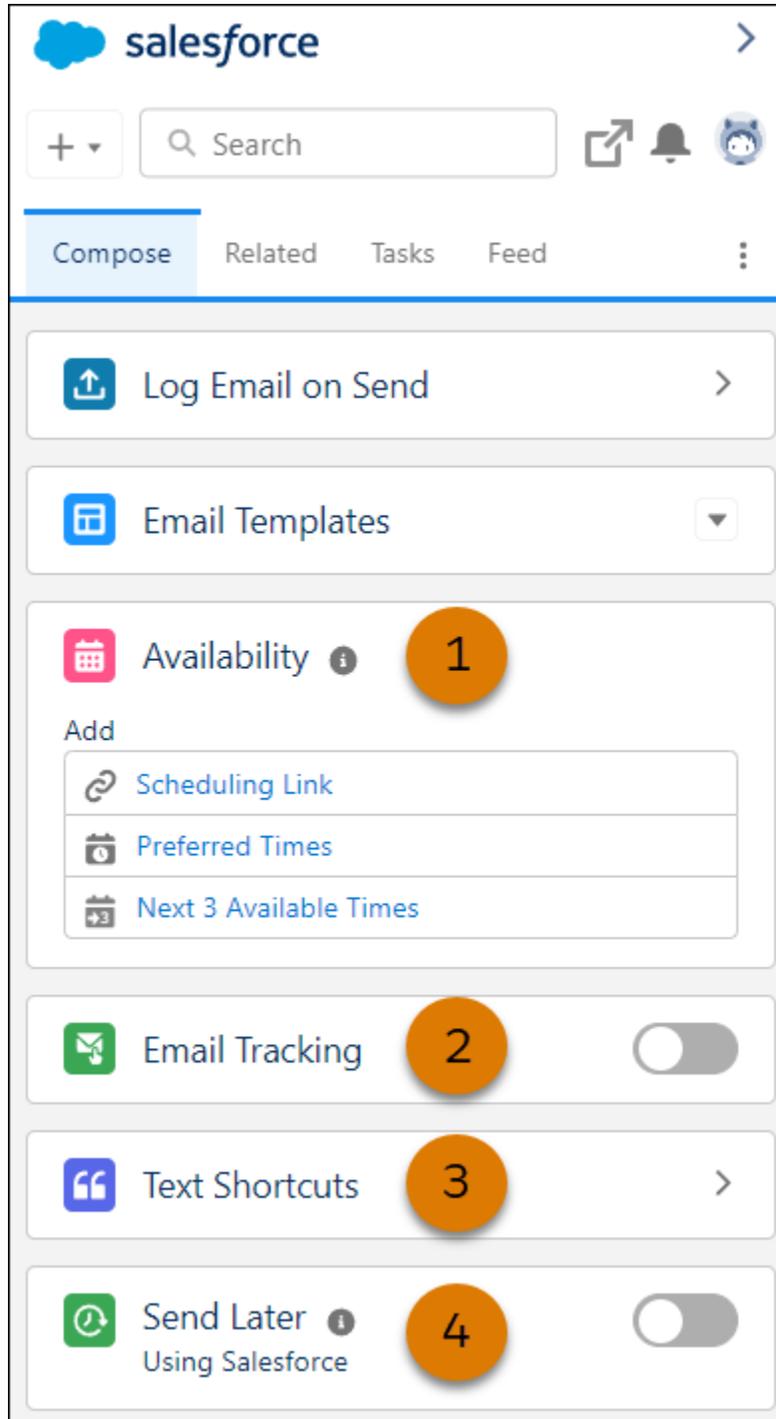
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Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance,** and **Unlimited** Editions

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All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

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### Availability (1)

Let recipients select any available time on your calendar by inserting a scheduling link. Or insert open time slots from your calendar directly in an email for recipients to select which of your preferred times works best. The available times you provide are updated as your calendar availability changes. After a recipient selects a time, the event invitation is automatically generated and added to attendee calendars. If your admin has enabled Zoom video integration, connect your Zoom account and select to have a Zoom meeting link automatically added to the generated event invitation.

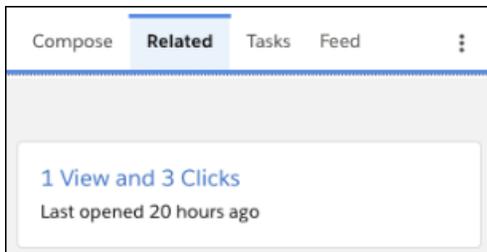
## Email Tracking (2)

To understand who's engaging with the messages you send, turn on **Email Tracking**, and select whether to track links in the email.

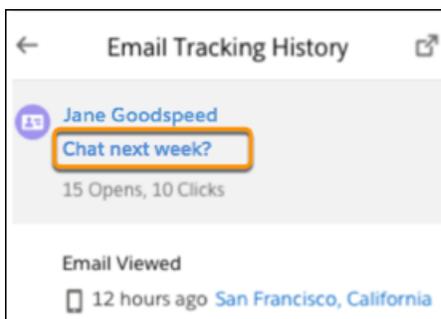
**Tip:** The integration remembers your last email tracking setting, so you don't have to turn it on for each new email. In Outlook, the integration pane must be open when you send the email for it to be tracked.

When a recipient opens your email or clicks links in the email, a receipt appears on the Feed tab. The Feed tab shows the engagement information for all tracked emails.

In the Outlook integration, see tracking results for an individual email in the Related tab. Your Salesforce admin determines where the individual tracking information appears in your integration. If it's not on the Related tab, ask your admin for help.



In the Gmail integration, from the Email Tracking History for an email, click the subject line to go directly to the email in your inbox.



## Text Shortcuts (3)

To save yourself time and ensure consistency when composing emails, create shortcuts for the common phrases that you use the most. The message can be up to 4,096 characters. The text shortcuts you save are available for your use only. To share text with other reps, use an email template.

In the Gmail integration, assign a shortcode to each text shortcut. You can type the shortcode + Enter or the shortcode + a space to add the text to the body of an email. In both Gmail and Outlook, you can select the text shortcut from a list to add it to an email.

**Tip:** If your admin enabled Salesforce quick text, text shortcuts saved in the Outlook or Gmail integration are available as quick text in emails in Salesforce. However, in Salesforce email, the text shortcuts you create in the Gmail integration don't include the shortcode. You can also use your own quick text that's saved to the Email channel within Salesforce in the Outlook and Gmail integrations. Shared, org-wide quick text isn't available in the integrations.

## Send Later (4)

To compose your email now and schedule it to send when it has the biggest impact, turn on **Send Later**. To review and manage your scheduled emails in the Scheduled tab, schedule to send your email using Salesforce instead of using the Send Later options in Outlook or Gmail. Select the day and time to send your email. Messages are saved as drafts until they're sent.

## Considerations for Scheduling Events with Insert Availability in the Outlook and Gmail Integrations with Inbox

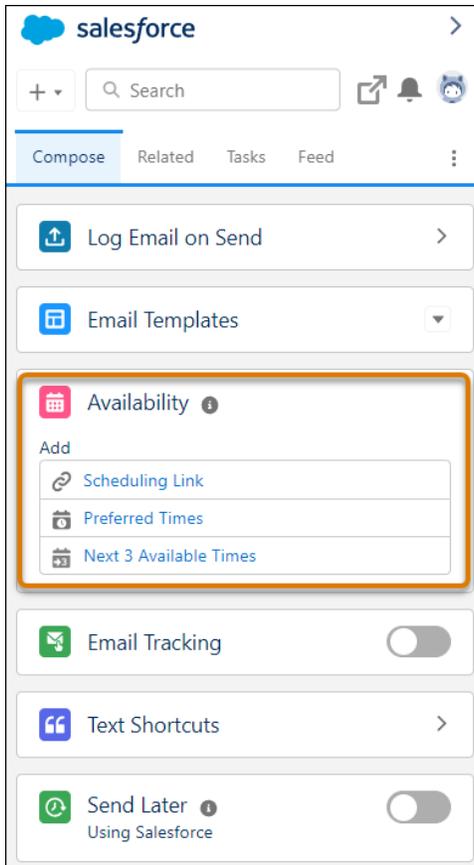
To avoid back-and-forth emails when scheduling events, insert open time slots from your calendar directly in an email. Recipients can select which time works best, and the event is automatically scheduled. Review the considerations about inserting availability.

Available in: Lightning Experience

Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance,** and **Unlimited** Editions

All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

To access the availability features when composing an email in the Outlook or Gmail integrations with Inbox, select an option in the Availability section of the email application pane.



 **Note:** If you also send emails from Lightning Experience desktop, you can use this feature from the Lightning Experience email composer.

- Let recipients select any available time on your calendar by inserting a scheduling link.
  - Each link is unique, created when you insert it.
  - You can't copy a link and use it elsewhere.
  - Scheduling links aren't supported in automatic email signatures.
  - Links are valid for 90 days.
- When selecting available times, the event owner's calendar is the primary calendar from their connected email account. Events from the connected account's primary calendar, not from the Salesforce calendar or other additional calendars, are reflected on the calendar grid when selecting available times.

- The suggested times that the recipient sees update as the event owner's availability changes. The available times are based only on the event owner's availability. The options available in the email don't live update as other attendees calendars become booked.
- A user's availability is set to 9 AM–5 PM. To change their availability, go to personal settings, find Meeting Settings, and make any changes.
- The default time zone is based on the Salesforce user's time zone, not their computer's time zone.
- If there are multiple attendees, the event time is set when the first recipient selects a free time slot. The invite is then populated on all attendees' calendars.
- If a coworker has shared their calendar with you, you can view their calendar to schedule around their availability. Your coworker doesn't need an Inbox license to share their calendar.
- If a coworker has given you write permissions to their calendar, you can use Insert Availability to schedule meetings on their behalf. Select a different meeting owner in the Insert Availability window. In Outlook, to be available as a meeting owner, the owner of the shared calendar must also be an attendee on the invitation.
- Make sure that recipients are using up-to-date email clients and browsers. If the recipient's email client or browser doesn't support TLS 1.2, they receive an error message when they select an available time in the email.
- The attendee calendar doesn't recognize Google Calendar Out of Office events.
- If Zoom video integration is enabled, connect your Zoom account and select to have a Zoom meeting link automatically added to the generated event invitation.

If you're using the Availability feature from the Gmail integration with Inbox, a Google Meet link is created by default when the event invitation is generated. If Zoom is your chosen virtual conferencing solution, be sure to select to include a Zoom link instead. If you use a different virtual conferencing solution, manually generate the meeting link using that solution's tools and add it after the event invitation is generated.

#### SEE ALSO:

[Do More While Composing Emails in Outlook and Gmail](#)

[Considerations for Insert Availability in Lightning Experience Desktop](#)

[Zoom Integration](#)

## Guidelines for Tracking Emails in the Outlook and Gmail Integrations with Inbox

When Inbox features are added to the integration Outlook or Gmail, sales reps can track when recipients open emails and click links in emails. Before you enable email tracking for your sales reps, review these key considerations about setup and how emails are tracked.

Available in: Lightning Experience

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Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance, and Unlimited Editions**

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All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

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### General Considerations

- In Gmail, set the Email Tracking option in the panel. You can minimize the panel and still have the email tracked when you send it. In Outlook, the side panel must be open and Email Tracking selected when you send the email for the email to be tracked.
- When emails are sent with Email Tracking enabled, a one pixel image is embedded in the email body. When emails are opened, the information for the tracked emails is passed back to the server. In some Outlook versions and depending on your recipient's email settings, the pixel shows in native HTML code in the email body.

- The count for opened emails stops at 101 opens. Additional email opens aren't reflected in the summary.
- Tracking information is gathered in regular, timed cycles. If a recipient opens an email multiple times in one gathering cycle, only the first opening is tracked. If the recipient opens the email again in a different cycle, that opening is tracked as a separate opening.
- Emails opened in an email web client can show as "Viewed from Mobile" when the exact email client can't be verified.
- The details for all tracked emails are available on the Feed tab. The feed shows the last 30 days' worth of engagements, with the most recent notifications at the top. To see 90 days' worth of engagement history for an email logged to Salesforce, reps can use the Engagement History related list on the EmailMessage record.
- If there's a delay while passing information from the sending user's mail client to their local Exchange or Office 365 system, Email tracking information can also be delayed. Salesforce is interacting with the user's message transfer agent, not their local mail client to collect the background information on the sent email for tracking.
- Emails set for tracking are tracked indefinitely.
- Email tracking can work unexpectedly if recipients open tracked emails in Apple Mail on devices running iOS 15, iPadOS 15, macOS Monterey, or watchOS 8.

### Email Tracking and Sales Engagement

- The Sales Engagement Work Queue includes the same Feed tab as the integration. Depending on your email integration pane design, you could see a Feed tab in the Work Queue and a Feed tab in the email integration pane. The tabs contain the same engagement information and filter abilities.

### Email Tracking Limitations

- If the recipient's email blocks HTML or images, the email isn't tracked. If a spam or mail filter touches or executes the tracking pixel that's embedded in emails for tracking, it's tracked as opening an email.
- When a tracked email is sent to more than one recipient or to a group alias, the tracking details indicate each time the email was opened. However, the details don't indicate which user opened the email.
- If an email is forwarded or opened from a Sent folder, the tracking information shows the original recipient, not the person it was forwarded to.
- HTML Email Status Reports don't include emails sent.
- If the recipient's email client or browser doesn't support TLS 1.2, the sender doesn't receive tracking information when the email is opened or links are clicked.

### SEE ALSO:

[Engagements and Alerts in the Outlook and Gmail Integrations with Inbox](#)

[Knowledge Article: Salesforce Inbox Email Tracking and Apple Privacy Policy](#)

## Engagements and Alerts in the Outlook and Gmail Integrations with Inbox

The Feed tab in the integration provides a comprehensive look at how your customers and prospects engage with the emails that you send. The feed includes information such as replies to emails sent from across Salesforce, not just from Outlook or Gmail.

Available in: Lightning Experience

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Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance,** and **Unlimited Editions**

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All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

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Engagement data is gathered for all emails that you send from the Outlook and Gmail integrations with Inbox. That includes emails generated from the Work Queue if you have Sales Engagement, and emails that aren't set for email tracking. Engagement data is also available if Einstein Activity Capture is on and the email includes at least one external recipient.

The Feed tab includes these actions for emails sent with tracking on:

- A recipient opens an email.
- A recipient clicks a tracked link.

The Feed tab includes these actions for each recipient on an email:

- A recipient replies to an email.
- You receive an automated out-of-office reply.
- An email bounces back to you.

 **Tip:** If you use the Work Queue, you have Sales Engagement. You also receive alerts in the feed when a new lead, contact, or person account is assigned to you.

The feed shows the last 30 days' worth of engagements, with the most recent notifications at the top. Use the sorting and filtering options to find your hottest leads. If you use cadences and the Work Queue, you can also find the engagement data in the My Feed tab within the Work Queue. Your Salesforce admin determines whether you also have a Feed tab with the same information.

To see 90 days' worth of engagement history for an email logged to Salesforce, use the Engagement History related list on the EmailMessage record in Sales.

SEE ALSO:

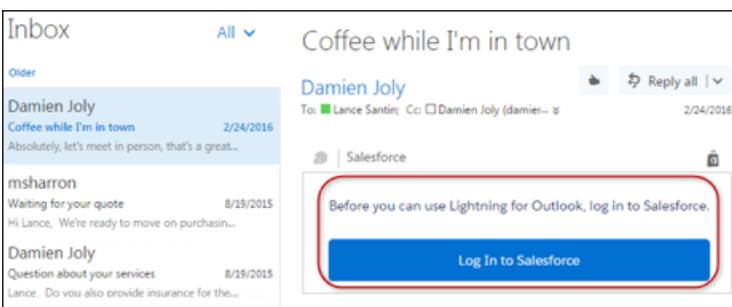
[View Prospect Engagement in the Work Queue](#)

[View Engagement for Specific Emails on Lead, Contact, and Person Account Records](#)

## 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, your reps 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.

### 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**

# Einstein Activity Capture

Let Einstein help keep data between Salesforce and your email and calendar applications up to date. Then you can get back to more important things, like selling.

## [Einstein Activity Capture Basics](#)

Before getting started with Einstein Activity Capture, review details about how it works, system requirements, and how data is stored.

## [Einstein Activity Capture Considerations](#)

Learn about Einstein Activity Capture limitations and options.

## [Set Up Einstein Activity Capture](#)

Review the steps for setting up Einstein Activity Capture. After admins set up the feature, end-users have a few things to do.

## [Emails and Einstein Activity Capture](#)

Learn about what happens when emails are enabled in an Einstein Activity Capture configuration.

## [Events and Einstein Activity Capture](#)

Learn about what happens when events are enabled in an Einstein Activity Capture configuration.

## [Contacts and Einstein Activity Capture](#)

Learn about what happens when contacts are enabled in an Einstein Activity Capture configuration.

## [Reporting on Logged and Captured Activities from Einstein Activity Capture](#)

Use standard reports to keep an eye on all your activities and customer interactions. Turn on Activity 360 Reporting to enable reporting objects that unify your automatically captured data from Einstein Activity Capture (EAC) with all your other activity data, such as calls, manually logged tasks, and emails. View the out-of-the-box dashboard and reports to easily monitor your team's activity. Trigger flows from Activity 360 Reporting data to automate your business processes.

## [Analytics and Einstein Activity Capture](#)

When you use Einstein Activity Capture, you can use the Activities dashboard or Activity Metrics to see your activity data aggregated.

### SEE ALSO:

[Sales Cloud Einstein](#)

[Salesforce Inbox](#)

[Sales Engagement](#)

[Salesforce Meetings](#)

[Einstein Activity Capture Security Guide](#)

## EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

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Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

## Einstein Activity Capture Basics

Before getting started with Einstein Activity Capture, review details about how it works, system requirements, and how data is stored.

### [What Does Einstein Activity Capture Do?](#)

Einstein Activity Capture is a productivity-boosting tool that helps keep data between Salesforce and your email and calendar applications up to date. To keep data up to date between applications, Einstein Activity Capture focuses on three types of data—emails, events, and contacts. Learn more about how Einstein Activity Capture handles each data type.

### [What Is Einstein Activity Capture Standard?](#)

Einstein Activity Capture Standard is available for users who don't have Performance or Unlimited Editions or a Sales Cloud Einstein, Inbox, Sales Engagement, or Revenue Intelligence license. Einstein Activity Capture has a few differences depending on which version you use.

### [Einstein Activity Capture System Requirements](#)

Before you set up Einstein Activity Capture, confirm that your Google Workspace account or Microsoft® Exchange-based server meet the system requirements.

### [Data Retention for Einstein Activity Capture and Inbox](#)

Einstein Activity Capture and Inbox store some data on Hyperforce and Amazon Web Services (AWS) infrastructure. Learn how much of your data is stored on Hyperforce and AWS and for how long.

#### SEE ALSO:

[Einstein Activity Capture](#)

[Einstein Activity Capture Security Guide](#)

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## What Does Einstein Activity Capture Do?

Einstein Activity Capture is a productivity-boosting tool that helps keep data between Salesforce and your email and calendar applications up to date. To keep data up to date between applications, Einstein Activity Capture focuses on three types of data—emails, events, and contacts. Learn more about how Einstein Activity Capture handles each data type.



**Tip:** The term *capture* refers to data that's gathered from the connected Microsoft or Google account and held in virtual records. For example, captured data is used to generate insights and engagement details on the timelines of related Salesforce records. The captured data isn't stored in your primary Salesforce database and isn't used to create Salesforce records that can be queried.

Data Type	How It Works
<p><a href="#">Emails</a></p>	<p>Emails that Einstein Activity Capture users send and receive are captured and automatically added to the activity timeline of related account, contact, lead, opportunity, contract, and quote records.</p> <p>Email data is also used to create email insights. Plus, if you use Inbox or Sales Engagement, email data generates engagement data.</p> <p>Emails sent from Salesforce goes through the connected email account.</p> <p>Captured emails aren't Salesforce records and aren't available in standard reports and other Salesforce platform capabilities.</p>
<p><a href="#">Events</a></p>	<p>Events are synced between Salesforce and users' connected Microsoft or Google accounts. You can allow the <a href="#">synced events to be related to Salesforce contact and lead records</a>.</p> <p>When events move from the connected account to Salesforce, they become Salesforce records and are available in standard reporting and Salesforce Platform capabilities. Events appear on the My Events calendar in Salesforce.</p> <p>Depending on your settings, events that Einstein Activity Capture users are included in get added automatically to the activity timeline of additional records: opportunities, contracts, and quotes. But the events aren't Salesforce records and aren't reflected in reports and other Salesforce Platform capabilities.</p>

### EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter, Professional, Enterprise, Performance,** and **Unlimited** Editions

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Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

Data Type	How It Works
<a href="#">Contacts</a>	<p>Contacts are synced between Salesforce and users' connected Microsoft or Google accounts.</p> <p>When contacts move from the connected account to Salesforce, they become Salesforce records and are available in standard reporting and Salesforce platform capabilities.</p>

-  **Note:** Starting in late 2023, Einstein Activity Capture services are migrating to Hyperforce, the Salesforce cloud-native infrastructure architecture, built for the public cloud. Before migration to Hyperforce, Einstein Activity Capture data is stored in Salesforce managed data centers and hosted on Amazon Web Services (AWS) behind a Virtual Private Cloud (VPC). After migration, the Einstein Activity Capture data and services are stored on Hyperforce and new AWS public cloud infrastructure, within the same region as before.
- For each data type that's enabled, data is captured from the connected Microsoft or Google account. The captured data is stored on Hyperforce infrastructure and a public cloud provider, such as Amazon Web Services (AWS).
  - Because email data is stored only on Hyperforce and AWS, the following applies to email data.
    - It isn't used to create Salesforce records.
    - You can report on captured emails after you turn on [Activity 360 reporting](#) on page 454 features. To see your activity data aggregated, you can also use the [Activities dashboard](#) and [Activity Metrics fields](#).
    - The [data retention](#) period determines how much email data is stored and for how long.
  - You can disable emails, events, or contacts. [Review what happens to your data when you do](#).
  - If you set up Einstein Activity Capture before Spring '19, your settings don't include event and contact sync. To enable syncing, create an Einstein Activity Capture configuration.

## SEE ALSO:

[Einstein Activity Capture](#)

[Set Up Einstein Activity Capture](#)

[Einstein Activity Capture Security Guide](#)

## What Is Einstein Activity Capture Standard?

Einstein Activity Capture Standard is available for users who don't have Performance or Unlimited Editions or a Sales Cloud Einstein, Inbox, Sales Engagement, or Revenue Intelligence license. Einstein Activity Capture has a few differences depending on which version you use.

Item	Einstein Activity Capture Standard	Einstein Activity Capture through Performance and Unlimited Editions or Sales Cloud Einstein, Inbox, Sales Engagement, or Revenue Intelligence
User assignments	You can assign the feature to up to 100 Sales Cloud users.	You can assign the feature to users with Performance or Unlimited editions, or a Sales Cloud Einstein, Inbox, Sales Engagement, or Revenue Intelligence license.
Data retention	<p>If you have only Standard Einstein Activity Capture users, a maximum of 6 months of captured activity data is stored and displayed on the activity timeline. The storage time can range from 3 to 6 months. To change the storage amount, contact Salesforce Customer Support.</p> <p>For more details, see <a href="#">Data Retention for Einstein Activity Capture and Inbox</a>.</p>	<p>If you have at least one Einstein Activity Capture user, 24 months of captured activity data is stored and displayed on the activity timeline.</p> <p>To change the storage amount, contact Salesforce Customer Support. You can store captured activity data for at least 3 months and up to 5 years.</p> <p>The data retention policy applies to all Einstein Activity Capture users. For more details, see <a href="#">Data Retention for Einstein Activity Capture and Inbox</a>.</p>
Activities Analytics dashboard	<p>The Activities dashboard is available in read-only mode from the Activities Dashboard tab.</p> <p>The amount of activity data that appears in the dashboard is 90 days.</p>	<p>The Activities dashboard is available from the Analytics tab and Analytics Studio. To access the Activities dashboard, API access is required. If you use Professional Edition, you must purchase API access. For users with read-only access, the dashboard is available from the Activities Dashboard tab. The amount of activity data that appears in the dashboard is 180 days.</p>

### EDITIONS

Available in: Lightning Experience

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Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

Item	Einstein Activity Capture Standard	<b>Einstein Activity Capture through Performance and Unlimited Editions or Sales Cloud Einstein, Inbox, Sales Engagement, or Revenue Intelligence</b>
		<p>For Inbox, full access to the dashboard is available to up to five Inbox users.</p> <p>For Sales Engagement, full access to the dashboard is available to up to three Sales Engagement users.</p> <p>For Sales Cloud Einstein, full access to the dashboard is available to all Sales Cloud Einstein users.</p> <p>For Revenue Intelligence, full access to the dashboard is available only to users with the Revenue Intelligence Admin permission set.</p> <p>For Performance and Unlimited editions, full access to the dashboard is available to up to three Sales Cloud Included users.</p> <p>For more information about access to the dashboard, see <a href="#">Give Users Access to the Activities Analytics Dashboard</a>.</p>
Einstein Email Insights	If you have only Standard Einstein Activity Capture users, Einstein Email Insights isn't on by default, and you can't create custom email insights.	If you have at least one Einstein Activity Capture user, Einstein Email Insights is on by default, and is available to all Einstein Activity Capture users. You can create custom email insights.
Recommended Connections	Standard Einstein Activity Capture users can't see recommended connections even when there are paid Einstein Activity Capture users.	Einstein Activity Capture users can see recommended connections on contact and lead records.
Activity Metrics	If you have only Standard Einstein Activity Capture users, Activity Metrics isn't available.	If you have at least one Einstein Activity Capture user, Activity Metrics is available to all Salesforce users.
Activity 360 reporting	If you have only Standard Einstein Activity Capture users, Activity 360 reporting isn't available.	If you have at least one Einstein Activity Capture user, Activity 360 reports are available to all Salesforce users.

## SEE ALSO:

[Assign Einstein Activity Capture Standard to Sales Cloud Users](#)

[Set Up Einstein Activity Capture](#)

## Einstein Activity Capture System Requirements

Before you set up Einstein Activity Capture, confirm that your Google Workspace account or Microsoft® Exchange-based server meet the system requirements.

All connection methods use the OAuth 2.0 protocol to authorize data retrieval from users' email service.

### Google

The user-level and service account connection methods are available for companies working from Google Workspace. Einstein Activity Capture supports the Basic, Business, and Enterprise editions of Google Workspace.

### Microsoft Exchange Online with Office 365

The user-level, org-level, and service account connection methods are available for companies working from Microsoft Exchange Online with Office 365. Before you connect Exchange to Salesforce, work with your Exchange admin to enable Exchange Web Services (EWS) on an SSL connection.

Einstein Activity Capture only supports Office 365 tenants hosted on Microsoft Azure global infrastructure clouds. Azure national and government clouds aren't supported.

### Microsoft Exchange 2019, 2016, or 2013

The user-level and service account connection methods are available for companies working from Microsoft Exchange 2019, 2016, or 2013.

Before you connect Exchange to Salesforce, work with your Exchange admin to enable Exchange Web Services (EWS) on an SSL connection and [allow the necessary network access](#). Make sure your server supports Basic Authentication requests.

### Microsoft Exchange Hybrid Deployments

For companies working from a combination of Microsoft Exchange Online and Microsoft Exchange on-premises servers, Einstein Activity Capture only supports user-level connections for the [capture functionality](#).

#### SEE ALSO:

[Einstein Activity Capture](#)

[Set Up Einstein Activity Capture](#)

#### EDITIONS

Available in: Lightning Experience

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Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

## Data Retention for Einstein Activity Capture and Inbox

Einstein Activity Capture and Inbox store some data on Hyperforce and Amazon Web Services (AWS) infrastructure. Learn how much of your data is stored on Hyperforce and AWS and for how long.

-  **Note:** Starting in late 2023, Einstein Activity Capture services are migrating to Hyperforce, the Salesforce cloud-native infrastructure architecture, built for the public cloud. Before migration to Hyperforce, Einstein Activity Capture data is stored in Salesforce managed data centers and hosted on Amazon Web Services (AWS) behind a Virtual Private Cloud (VPC). After migration, the Einstein Activity Capture data and services are stored on Hyperforce and new AWS public cloud infrastructure, within the same region as before.

### General

- When a Google or Microsoft account is first connected, Salesforce captures a certain amount of past data and stores it on Hyperforce and AWS. Over time, Salesforce stores a maximum amount of Einstein Activity Capture or Inbox data.
- The retention periods begin when an activity occurs, not when it's added to Salesforce.
- After the data retention period ends, the data is removed from the system, regardless of when it was added to Salesforce. 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. It can take up to 1 month before the data is removed from the system.
- De-identified data derived from activities is kept for up to 2 years, and used with machine learning models and third-party data enrichment. The data retention policy doesn't apply to this de-identified data.

### Einstein Activity Capture

- For Einstein Activity Capture users, the data retention period applies to emails and events. However, when events sync to Salesforce, they become Salesforce records and are subject to your Salesforce data allocations.
- If your org has at least one Sales Cloud Einstein, Inbox, Sales Engagement, or Revenue Intelligence license, the data retention policy for that license applies to all Einstein Activity Capture users.

License or environment	Past Data Captured When a Google™ or Microsoft® Account Is First Connected	Time Period Data Is Stored and Available on the Activity Timeline
<ul style="list-style-type: none"> <li>• Sales Cloud Einstein</li> <li>• Inbox</li> <li>• Sales Engagement</li> <li>• Revenue Intelligence</li> </ul>	<p>Emails: The default is 180 days, up to 50,000 emails. Admins can reduce the length of time in the configuration's advanced settings.</p> <p>Events: The default is 0 days. Therefore, events that end before the user connects an account aren't synced or added to the activity timeline. Admins can increase the length of time</p>	<p>The default is 24 months.</p> <p>The amount can range from 3 months to 5 years.</p> <p>To change the storage amount, contact Salesforce Customer Support</p>
Sales Cloud		<p>The default is 6 months.</p> <p>The amount can range from 3 to 6 months.</p>

### EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter, Professional, Enterprise, Performance,** and **Unlimited** Editions

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Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

License or environment	Past Data Captured When a Google™ or Microsoft® Account Is First Connected	Time Period Data Is Stored and Available on the Activity Timeline
	to 180 days, up to 5,000 events, in the configuration's advanced settings.	To change the storage amount, contact Salesforce Customer Support.
Sandbox		The default is 6 months The storage amount can't be changed.

## Inbox

- The following table is applicable for orgs where Inbox is used, but no users have been granted an Einstein Activity Capture license. For cases where Einstein Activity Capture licenses are being used, refer to the previous table.
- For Inbox users, the data retention policy applies when the user has a connected email account. The policy applies even if that user doesn't actively use Inbox or have access to Einstein Activity Capture.
- Emails that are manually logged from Inbox become Salesforce records and are subject to your Salesforce data allocations.

License or environment	Past Data Captured When a Google™ or Microsoft® Account is First Connected	Data Storage Time Period
Inbox	180 days, up to 50,000 emails and 5,000 events	6 months The storage amount can't be changed.
Sandbox	180 days, up to 50,000 emails and 5,000 events	6 months The storage amount can't be changed.

## SEE ALSO:

[Einstein Activity Capture](#)

[Einstein Activity Capture Security Guide](#)

## Einstein Activity Capture Considerations

Learn about Einstein Activity Capture limitations and options.

### [Considerations for Setting Up Einstein Activity Capture](#)

Before setting up Einstein Activity Capture, review requirements, limitations, and other information about how it works.

### [Considerations for Excluding Data from Einstein Activity Capture](#)

Admins and users can prevent emails and events associated with a particular person or company from being added to related Salesforce records. You can also prevent events from syncing between Salesforce and connected accounts. Make sure that you understand the effects of adding emails and domains to the Einstein Activity Capture Excluded Addresses list.

### [Considerations for Disabling Emails, Events, or Contacts in Einstein Activity Capture](#)

When you create or edit an Einstein Activity Capture configuration, you can disable emails, events, or contacts. Make sure you understand what happens when you do.

#### SEE ALSO:

[Set Up Einstein Activity Capture](#)

[Einstein Activity Capture](#)

[Einstein Activity Capture Security Guide](#)

#### EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter, Professional, Enterprise, Performance, and Unlimited** Editions

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## Considerations for Setting Up Einstein Activity Capture

Before setting up Einstein Activity Capture, review requirements, limitations, and other information about how it works.

 **Note:** For more details about Einstein Activity Capture architecture, review the [Einstein Activity Capture Security Guide](#).

### General

- Depending on which authentication method you use to connect Salesforce to your email and calendar application, Einstein Activity Capture users are prompted to [connect their email and calendar to Salesforce](#) or accept terms of service.
- To connect an account, Einstein Activity Capture users who don't use Inbox must be in an active configuration.
- To capture emails and events, Einstein Activity Capture users must be in an active configuration. If you started using Einstein Activity Capture before Summer '23, users can capture emails and events without being in a configuration.
- Turning on Einstein Activity Capture in Government Cloud and Government Cloud Plus organizations can send data outside the authorization boundary. Contact your Salesforce account executive for more details.
- For events and contacts to sync, the connected email account must be the user's primary account (the email account on their Salesforce user record). It must not be an email alias, and it must be in the user principal name (UPN) format.
- Einstein Activity Capture works with all Salesforce-supported languages. But only ASCII characters are supported in email addresses.
- Einstein Activity Capture users can't delete emails that Einstein Activity Capture adds to Salesforce. Admins can [delete past emails and events](#) that include a specific person based on their email address or username.
- If you use Salesforce Essentials Email-to-Case, make sure that the email address you use to connect to Salesforce is different from the one that you use to connect Einstein Activity Capture to Salesforce.
- You can't use Einstein Activity Capture and Lightning Sync at the same time.
- If using Lightning Sync or a version of Einstein Activity Capture without sync, we remove old configurations and settings before you create an Einstein Activity Capture configuration.
- When opportunities have no overdue tasks and Einstein Activity Capture is enabled, the alerts on Opportunity Kanban aren't shown.
- Einstein Activity Capture included in Sales Cloud Unlimited Edition provides analytics reporting using the CRM Analytics platform. When using this functionality, your license doesn't allow you to:
  - Build custom analytics apps or dashboards
  - Upload, access, or connect external data using the API with the exception of datasets provided with Sales Cloud Einstein
  - Import data from Salesforce standard or custom objects that aren't included in this feature
- Contact sync doesn't support Outlook categories, so contacts labeled with a Salesforce\_Sync category that don't exist in a contacts subfolder of the same name don't sync with Salesforce. To avoid this issue, disable contact

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categories and select the Salesforce\_Sync folder for new contacts in Outlook. See [EAC - New Contacts Created In Outlook with 'Salesforce\\_Sync' Category Do Not Sync to Salesforce](#).

## Email Alias Addresses

Einstein Activity Capture doesn't support alias email addresses. When a user's connected email account has an alias, some unexpected behavior can occur. For example, when the user sends an email from Salesforce, the email composer doesn't show the alias but the sent email does. Also, depending on where the email is later viewed from, previous emails aren't always included in the email thread.

To make sure that Salesforce users are included as event attendees, use their primary Microsoft or Google email addresses when you create their Salesforce user records. And to make sure that contacts and events sync between applications, users must add primary email addresses to contacts or events when possible.

## Encryption

 **Note:** Starting in late 2023, Einstein Activity Capture services are migrating to Hyperforce, the Salesforce cloud-native infrastructure architecture, built for the public cloud. Before migration to Hyperforce, Einstein Activity Capture data is stored in Salesforce managed data centers and hosted on Amazon Web Services (AWS) behind a Virtual Private Cloud (VPC). After migration, the Einstein Activity Capture data and services are stored on Hyperforce and new AWS public cloud infrastructure, within the same region as before.

For captured emails and events, the data is stored on Hyperforce and Amazon Web Services (AWS) infrastructure, so Salesforce platform encryption isn't available. Instead, the data is encrypted at rest using AES-256 server-side encryption. When Shield Platform Encryption is enabled for your org, emails and events that are added to the activity timeline of related Salesforce records show the names of encrypted contacts and leads.

When Shield Platform Encryption is enabled on any Salesforce object or field, Einstein Activity Capture still syncs events and contacts, but the behavior is modified.

If you encrypt the Email field on the User object, the User Email field is duplicated in the Salesforce database when users are added to sync configurations that sync contacts or events. Even when the User Email field is encrypted using Shield Platform Encryption, this duplicate field stores user emails in the Salesforce database in an unencrypted state. When Shield Platform Encryption is turned on, Einstein Activity Capture matching behavior is modified.

## Event Encryption

Normally, Einstein Activity Capture matches records using the same standard Salesforce fields. But when you encrypt the Email field on Salesforce users, contacts, or leads, Einstein Activity Capture expands its search to any custom email field that you added to the record in these cases:

## Contact Encryption

Normally, Einstein Activity Capture matches contacts between Salesforce and your external contact application using the same standard Salesforce fields. But when you encrypt the Email field on Salesforce contacts, Einstein Activity Capture expands its search to any custom email field that you add to the Salesforce contact. Einstein Activity Capture syncs the first matching email address it identifies so contacts can be matched based on the standard Email field or the custom email field.

## Multiple Salesforce Orgs

You use multiple Salesforce orgs if you test new features in a sandbox before setting them up in production, or if you maintain separate orgs for different divisions of your company.

- Setting up the same user to sync across multiple orgs isn't supported. We recommend testing in a sandbox org before rolling out Einstein Activity Capture. But make sure to remove users from sandbox sync configurations before adding users to production configurations.
- We don't recommend marking an Einstein Activity Capture configuration as inactive to prevent a user from syncing across multiple orgs. You risk forgetting that the user is included in multiple configurations. And you risk marking the configuration as active later by accident.



**Example:** You're testing Einstein Activity Capture in your sandbox org. You add a user to a sync configuration in the sandbox. After you're satisfied with how you set up Einstein Activity Capture for them, you're ready to add the user to a configuration in your production org.

Before you add the user to a configuration in production, remove them from the configuration in your sandbox to avoid sync issues. You also risk syncing test data onto your production org and email server.

#### SEE ALSO:

[Set Up Einstein Activity Capture](#)

[Emails and Einstein Activity Capture](#)

[Events and Einstein Activity Capture](#)

[Contacts and Einstein Activity Capture](#)

## Considerations for Excluding Data from Einstein Activity Capture

Admins and users can prevent emails and events associated with a particular person or company from being added to related Salesforce records. You can also prevent events from syncing between Salesforce and connected accounts. Make sure that you understand the effects of adding emails and domains to the Einstein Activity Capture Excluded Addresses list.

-  **Note:** Starting in late 2023, Einstein Activity Capture services are migrating to Hyperforce, the Salesforce cloud-native infrastructure architecture, built for the public cloud. Before migration to Hyperforce, Einstein Activity Capture data is stored in Salesforce managed data centers and hosted on Amazon Web Services (AWS) behind a Virtual Private Cloud (VPC). After migration, the Einstein Activity Capture data and services are stored on Hyperforce and new AWS public cloud infrastructure, within the same region as before.
- The admin's Excluded Addresses list applies to all Einstein Activity Capture users, but users can add email addresses to their own Excluded Addresses list.
  - We add the default internal domain to the excluded list so that emails and events between users in your company aren't added to Salesforce records or synced. Your company's default internal domain is the domain used in the admin's email address. If your company uses other internal domains, the admin must add them to the excluded list.
  - Emails where all email addresses are part of the internal domain (internal emails) are always excluded. If the sender, recipient, and cc address contain an internal domain you specified in the excluded list, the email is considered internal. If the sender, recipient, and cc address contain the same domain of a connected data source, the email is considered internal.
  - Events where all attendees, including the organizer, are part of the internal domain (internal events) can be included or excluded. Events that have the meeting organizer as the sole attendee are also considered. Go to Einstein Activity Capture settings and turn **Sync Internal Events** on or off.
  - Internal domains can't be deleted from the excluded addresses list when the domain matches the primary email address (the email on the user record) of any:
    - Salesforce admin
    - Salesforce user with the Customize Application or Modify All Data permissions
  - If the email addresses on a Salesforce record all belong to an internal domain, then emails and events aren't added to the record's timeline. For example, the internal domain used to set up Einstein Activity Capture is *acme.com*. John Smith is a contact record in Salesforce with the email *john@acme.com*. The John Smith contact record doesn't show any emails or events because the email address *john@acme.com* is part of the *acme.com* internal domain.
  - To protect users from inadvertently sharing sensitive information, Einstein Activity Capture attempts to identify automated and non-automated emails with sensitive information. The emails are set to the Don't Share sharing setting, regardless of the user's individual sharing setting. The emails are marked as sensitive so that users know why the sharing setting was changed. For example, emails that include a credit card number from a customer are kept private. Automated responses about a password reset are also kept private. The email owner can later change the sharing setting to something less restrictive. The settings that prevent these emails from being shared are on by default, but [you can turn them off](#).

Some automated email replies are useful to your colleagues and aren't set to private. Examples include out-of-office replies and email bounce notifications.

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To add extra protections, admins can update the Excluded Addresses list with customer domains and email addresses from the services their company uses. Services that offer payroll, financial support, or human resources for your company are good candidates to add to the Excluded List. Then, if someone creates a Salesforce contact record with the email address *no-reply@confidential.tax.details.com*, emails from that sender aren't added to the contact's activity timeline.

- All internal domains that are included in the excluded list apply to Einstein Activity Capture and Zoom Integration.
- When you exclude an email address or customer domain, here's what happens regarding captured email and events.
  - New emails and events aren't added to the activity timeline, and past ones are removed.
  - New events are still added to the user's Salesforce calendar, and past ones remain.
  - New and past emails and events are still stored on Hyperforce and Amazon Web Services (AWS).
  - Manually added email and events remain on the activity timeline and calendar.
- When you exclude an email address or customer domain, here's what happens regarding synced events.
  - New events don't sync between Salesforce and the connected accounts.
  - New events aren't stored in Salesforce.
  - Previously synced events no longer sync, but they remain in Salesforce or the connected accounts.
- If you remove an email address or customer domain from the excluded list, new email and events are captured and synced. Past emails and events remain excluded.
- In an event series, only the events that meet the excluded email address or domain criteria don't sync.
- Admins can prevent all email data for specific Einstein Activity Capture users from being added to the activity timeline and stored by Salesforce. When creating or editing an Einstein Activity Capture configuration, an admin can disable emails.
- When you exclude an email address or customer domain, several rules determine whether the related emails and events are captured and synced.
  - The admin's list applies to the entire org, and has priority over users' lists.
  - When email or event recipients include multiple Einstein Activity Capture users and a customer, Einstein Activity Capture users must add the customer's email to the Excluded Addresses list.
  - When email or event recipients include Einstein Activity Capture users and multiple customers, Einstein Activity Capture users must add at least one customer email or domain to the Excluded Addresses.



**Example:** Al and Barry are Einstein Activity Capture users. Cindy is a contact on the Acme account. Review how different scenarios affect what's captured and synced.

Scenario	Excluded Addresses List	Event Added to Activity Timeline?	Event Added to User's Salesforce Calendar?	Event Synced Between Salesforce and Connected Accounts?
Al sends a meeting invite to Cindy and includes Barry on the invite.	Al and Barry add Cindy to their lists.	No	Yes	No
	Al adds Cindy to his list. Barry does not.	Yes	Yes	Yes
	Al adds Cindy to his list. Barry does not. The admin adds	No	Yes	No

Scenario	Excluded Addresses List	Event Added to Activity Timeline?	Event Added to User's Salesforce Calendar?	Event Synced Between Salesforce and Connected Accounts?
	Cindy's email domain to the org-wide list.			
Al sends a meeting invite to Cindy and her team. Some of the recipients use the @acme.com domain and others use the @acme_jr.com domain.	Al adds only Cindy's email to his list.	No	Yes	No
Al sends a meeting invite to Cindy and her team. Some of the recipients use the @acme.com domain and others use the @acme_jr.com domain. Al includes Barry on the invite.	Al adds only Cindy to his list. Barry does not.	Yes	Yes	Yes
	The admin adds the @acme_jr domain to the org-wide list.	No	Yes	No

## SEE ALSO:

[Exclude Certain Emails and Events from Being Added to Salesforce](#)

[Exclude Emails and Events from Being Added to Salesforce](#)

[Einstein Activity Capture](#)

## Considerations for Disabling Emails, Events, or Contacts in Einstein Activity Capture

When you create or edit an Einstein Activity Capture configuration, you can disable emails, events, or contacts. Make sure you understand what happens when you do.

### [Considerations for Disabling Emails in an Einstein Activity Capture Configuration](#)

You can prevent email data from being used by Einstein Activity Capture. Make sure that you understand the effects of disabling emails.

### [Considerations for Disabling Events in an Einstein Activity Capture Configuration](#)

You can prevent event data from being used by Einstein Activity Capture. Make sure that you understand the effects of disabling events.

### [Considerations for Disabling Contacts in an Einstein Activity Capture Configuration](#)

You can prevent contact data from being used by Einstein Activity Capture. Make sure that you understand the effects of disabling contacts.

#### SEE ALSO:

[Create a Configuration for Einstein Activity Capture](#)

[Set Up Einstein Activity Capture](#)

#### EDITIONS

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## Considerations for Disabling Emails in an Einstein Activity Capture Configuration

You can prevent email data from being used by Einstein Activity Capture. Make sure that you understand the effects of disabling emails.

- 📌 **Note:** Starting in late 2023, Einstein Activity Capture services are migrating to Hyperforce, the Salesforce cloud-native infrastructure architecture, built for the public cloud. Before migration to Hyperforce, Einstein Activity Capture data is stored in Salesforce managed data centers and hosted on Amazon Web Services (AWS) behind a Virtual Private Cloud (VPC). After migration, the Einstein Activity Capture data and services are stored on Hyperforce and new AWS public cloud infrastructure, within the same region as before.
- To stop capturing emails for a user, add them to an Einstein Activity Capture configuration with emails disabled.
- When you disable emails, here's what happens to emails.
  - Emails aren't added to the activity timeline of related Salesforce records. Previously captured emails remain on the activity timeline.
  - Emails aren't included in the Activities dashboard.
  - Email data isn't available to Einstein features, such as Email Insights.
  - For non-Inbox users, email data isn't stored on Hyperforce or Amazon Web Services (AWS). Previously captured emails remain on Hyperforce and AWS.
  - For Inbox users, email data is still stored on Hyperforce and AWS. The email data is used for Inbox productivity features.
- If a user has more than one email account connected to Salesforce and is in an email-disabled configuration, emails from all their accounts stop being captured.
- Users whose emails aren't captured can still send emails from the email composer on the activity timeline. The email is added to the activity timeline. However, emails sent from Salesforce in this way no longer go through users' connected accounts. Instead, they go through Salesforce similar to when Einstein Activity Capture isn't on.
- Users whose emails aren't captured automatically can still log emails manually from the Outlook and Gmail integrations.
- If you re-enable emails, we don't go back and capture emails from the time when email was disabled. If a user's account is connected or reconnected after email is re-enabled, we capture a certain amount of past email data. For details, see [Data Retention for Einstein Activity Capture and Inbox](#).

### SEE ALSO:

- [Create a Configuration for Einstein Activity Capture](#)
- [Guidelines for Using Emails with Einstein Activity Capture](#)
- [Permission Sets](#)

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## Considerations for Disabling Events in an Einstein Activity Capture Configuration

You can prevent event data from being used by Einstein Activity Capture. Make sure that you understand the effects of disabling events.

- 📌 **Note:** Starting in late 2023, Einstein Activity Capture services are migrating to Hyperforce, the Salesforce cloud-native infrastructure architecture, built for the public cloud. Before migration to Hyperforce, Einstein Activity Capture data is stored in Salesforce managed data centers and hosted on Amazon Web Services (AWS) behind a Virtual Private Cloud (VPC). After migration, the Einstein Activity Capture data and services are stored on Hyperforce and new AWS public cloud infrastructure, within the same region as before.
- To stop users' event data from moving between Salesforce and the connected account in all directions, add them to an Einstein Activity Capture configuration with events disabled.
- When you disable events, here's what happens to events.
  - Event data isn't synced between Salesforce and the connected account.
  - Event records aren't created in Salesforce.
  - Events aren't added to the activity timeline of related Salesforce records. Previously captured events remain on the timeline.
  - Events aren't included in the Activities dashboard.
  - Event data isn't available to Einstein features.
  - For non-Inbox users, event data isn't stored on Hyperforce and Amazon Web Services (AWS). Previously captured events remain on Hyperforce and AWS.
  - For Inbox users, event data is still stored on Hyperforce and AWS. The event data is used for Inbox productivity features.
- If a user is using more than one email account to capture events and is in an event-disabled configuration, events from all their accounts stop being captured.
- If you re-enable events, we don't go back and capture events from the time when event capture was disabled. Events that were created or updated in the Microsoft or Google calendar, regardless of when, are synced to Salesforce. If a user's account is connected or reconnected after events is re-enabled, we capture a certain amount of past event data. For details, see [Data Retention for Einstein Activity Capture and Inbox](#).
- If you use Salesforce Meetings and disable events, the Meeting Digest doesn't show the enhanced attendee list or intelligent insights for synced events.

### SEE ALSO:

[Create a Configuration for Einstein Activity Capture Events and Einstein Activity Capture Permission Sets](#)

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## Considerations for Disabling Contacts in an Einstein Activity Capture Configuration

You can prevent contact data from being used by Einstein Activity Capture. Make sure that you understand the effects of disabling contacts.

- 📌 **Note:** Starting in late 2023, Einstein Activity Capture services are migrating to Hyperforce, the Salesforce cloud-native infrastructure architecture, built for the public cloud. Before migration to Hyperforce, Einstein Activity Capture data is stored in Salesforce managed data centers and hosted on Amazon Web Services (AWS) behind a Virtual Private Cloud (VPC). After migration, the Einstein Activity Capture data and services are stored on Hyperforce and new AWS public cloud infrastructure, within the same region as before.
- To stop users' contact data from moving between Salesforce and the connected account in all directions, add them to an Einstein Activity Capture configuration with contacts disabled.
  - When you disable contacts, here's what happens to contacts.
    - Contact data isn't synced between Salesforce and the connected account.
    - Contact records aren't created in Salesforce.
    - Contact data isn't available to Einstein features, such as Email Insights and Recommended Connections.
    - Contact data isn't stored on Hyperforce or Amazon Web Services (AWS). Previously captured contact data remains on Hyperforce and AWS.
  - If a user is capturing contact data with more than one email account and is in a contact-disabled configuration, contacts from all their accounts stop being captured.
  - If you re-enable contacts, we don't go back and capture contacts from the time when contacts were disabled. We sync new and updated contacts.

### SEE ALSO:

[Create a Configuration for Einstein Activity Capture Contacts and Einstein Activity Capture Permission Sets](#)

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## Set Up Einstein Activity Capture

Review the steps for setting up Einstein Activity Capture. After admins set up the feature, end-users have a few things to do.

### [Admin Setup for Einstein Activity Capture](#)

Get your sales reps up and running with Einstein Activity Capture. Give users access to Einstein Activity Capture. Connect your company's email and calendar application to Salesforce, and create a configuration that controls how data moves between applications. Define settings such as which data to exclude and how activities are shared. The basic setup steps are the same for Einstein Activity Capture Standard and the licensed versions.

### [End-User Setup for Einstein Activity Capture](#)

Connect email and calendar accounts to Salesforce and control how activities are shared. Plus, prevent specific emails and events from being synced and added to the activity timeline.

### [Troubleshoot Einstein Activity Capture Setup Issues](#)

If you run into problems with Einstein Activity Capture, review our troubleshooting suggestions.

#### SEE ALSO:

[Einstein Activity Capture](#)

[Einstein Activity Capture Security Guide](#)

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## Admin Setup for Einstein Activity Capture

Get your sales reps up and running with Einstein Activity Capture. Give users access to Einstein Activity Capture. Connect your company's email and calendar application to Salesforce, and create a configuration that controls how data moves between applications. Define settings such as which data to exclude and how activities are shared. The basic setup steps are the same for Einstein Activity Capture Standard and the licensed versions.

### [Give Users Access to Einstein Activity Capture](#)

Make sure that you assign users to Einstein Activity Capture. You might need to give users access to the Activities dashboard.

### [Connection Methods for Microsoft Exchange](#)

Before Einstein Activity Capture can access users' email and calendar data, you must connect Salesforce to your Exchange application. The choices of how to connect and authenticate users depend on which email and calendar application you use.

### [Connection Methods for Google](#)

Before Einstein Activity Capture can access users' email and calendar data, you must connect Salesforce to Google.

### [Create a Configuration for Einstein Activity Capture](#)

Einstein Activity Capture configurations define how data flows between Salesforce and the connected accounts. By default, everything is enabled and moving in both directions, when applicable, but you can change the default settings.

### [Exclude Certain Emails and Events from Being Added to Salesforce](#)

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 the activity timeline of related Salesforce records. Events aren't added to the Salesforce calendar. And events aren't synced between Salesforce and the connected accounts. Your Excluded Addresses list applies to all Einstein Activity Capture users. Users can add more email addresses to their own Excluded Addresses lists.

### [Set Default Activity Sharing for Einstein Activity Capture Users](#)

Select whether Einstein Activity Capture users share their emails and events with other users or keep them private. Users can change their activity sharing at any time from their personal settings.

### [Enable More Features for Einstein Activity Capture and Inbox](#)

Einstein Email Insights and Recommended Connections make it easy for sales reps to move deals in the right direction.

#### SEE ALSO:

[Considerations for Setting Up Einstein Activity Capture](#)

[Einstein Activity Capture Basics](#)

[Manage Data Policies for Einstein Features](#)

#### EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

Available with Inbox in Sales Cloud, which is included in **Starter**, **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

## Give Users Access to Einstein Activity Capture

Make sure that you assign users to Einstein Activity Capture. You might need to give users access to the Activities dashboard.

### [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 which license and edition users have.

### [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.

#### SEE ALSO:

[Admin Setup for Einstein Activity Capture](#)

#### EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

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Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

## Select Who Can Use Einstein Activity Capture

## EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

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Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

Selecting who can use Einstein Activity Capture is as simple as assigning a permission set to users. The exact steps you take depend on which license and edition users have.

License or Edition	Permission Sets That Include the Einstein Activity Capture Permission
Sales Cloud	<p>Standard Einstein Activity Capture</p> <p>To assign the permission set to users, see <a href="#">Assign Einstein Activity Capture Standard to Sales Cloud Users</a>.</p>
Performance or Unlimited editions	<p>Sales Cloud Included and Einstein Activity Capture Included</p> <p>To access Einstein Activity Capture using Performance or Unlimited editions, users must have the <a href="#">Salesforce standard user license</a>.</p> <p>If you have users who accessed Einstein Activity Capture through a Sales Cloud Einstein, Inbox, Sales Engagement, or Revenue Intelligence permission set before Summer '22, we recommend that you assign those users to the Sales Cloud Included or Einstein Activity Capture Included permission set, or a custom permission set that includes the Einstein Activity Capture permission. To make these assignments, assign the new permission set to your users before removing the old permission set. Beginning in Summer '22, you can't add users to the old Sales Cloud Einstein, Inbox, Sales Engagement, or Revenue Intelligence permission sets.</p>
Sales Cloud Einstein	<p>Sales Cloud Einstein</p> <p>To assign the permission set to users, see <a href="#">Select Who Can Use Sales Cloud Einstein</a>.</p>
Inbox	<p>Inbox With Einstein Activity Capture</p> <p>To assign the permission set to users, see <a href="#">Select Who Can Use Inbox Features</a>.</p>
Sales Engagement	<p>Sales Engagement User</p> <p>To assign the permission set to users, see <a href="#">Assign Permission Sets for Sales Engagement Users</a>.</p>
Revenue Intelligence	<p>Revenue Intelligence Admin and Revenue Intelligence User</p>

## USER PERMISSIONS

To assign permission sets:

- Assign Permission Sets

To create permission sets:

- Manage Profiles and Permission Sets

License or Edition	Permission Sets That Include the Einstein Activity Capture Permission
	To assign the permission set to users, see <a href="#">Select Who Can Use Revenue Intelligence</a> .

## SEE ALSO:

- [Assign a Permission Set License to a User](#)
- [Admin Setup for Einstein Activity Capture](#)

## 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, Inbox, or Sales Engagement license. You can assign the permission set to up to 100 Sales Cloud users. Einstein Activity Capture Standard isn't available for Salesforce Government Cloud customers.

1. From Setup, enter *Permission Sets* in the Quick Find. Then, select **Permission Sets**.
2. Click the Standard Einstein Activity Capture permission set.
3. Click **Manage Assignments** and assign the permission set to up to 100 users.

## SEE ALSO:

- [Assign a Permission Set License to a User](#)
- [Admin Setup for Einstein Activity Capture](#)
- [What Is Einstein Activity Capture Standard?](#)

## 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: 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](#)

## EDITIONS

Available in: **Essentials** edition

## USER PERMISSIONS

To create permission sets:

- [Manage Profiles and Permission Sets](#)

To assign permission sets:

- [Assign Permission Sets](#)

## Connection Methods for Microsoft Exchange

Before Einstein Activity Capture can access users' email and calendar data, you must connect Salesforce to your Exchange application. The choices of how to connect and authenticate users depend on which email and calendar application you use.

### [Connect to Einstein Activity Capture with User-Level Authentication](#)

The user-level authentication method is available for Microsoft Exchange on-premises servers and Microsoft Exchange Online with Office 365. After users are assigned to Einstein Activity Capture, they're prompted to connect a Microsoft account to Salesforce.

### [Connect to Einstein Activity Capture with Org-Level OAuth 2.0](#)

The org-level authentication method is available for only Microsoft Office 365. The Salesforce admin works with their Exchange admin to give Salesforce access to data in Microsoft Office 365. The connection applies to all users in Salesforce, which lets the admin set up all Einstein Activity Capture users at the same time.

### [Connect to Einstein Activity Capture with a Microsoft Exchange Service Account](#)

The service account authentication method is available for Microsoft Office 365 and Microsoft Exchange on-premises servers. A service account lets you scope authentication to a specific set of users and set up all Einstein Activity Capture users at the same time. The Salesforce admin works with their Exchange admin to create a service account with the impersonation role and give Salesforce access to the service account user's data. Follow the steps based on the supported server that your company uses.

### [Connect Salesforce to Your Microsoft Exchange Endpoint](#)

If your Exchange Web Service (EWS) isn't exposed externally because the Microsoft Autodiscover setting isn't on, Einstein Activity Capture or Inbox can't find your Microsoft Exchange account. Manually connect your Microsoft Exchange endpoint to Salesforce so that your Microsoft Exchange users can benefit from Einstein Activity Capture or Inbox.

### [Allowing Network Access When Using Einstein Activity Capture with a Microsoft Exchange Server](#)

When setting up Einstein Activity Capture with a Microsoft Exchange on-premises server (2019, 2016, or 2013), make sure that you allow the necessary network access.

#### SEE ALSO:

[Admin Setup for Einstein Activity Capture](#)

[Einstein Activity Capture System Requirements](#)

#### EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

Available with Inbox in Sales Cloud, which is included in **Starter**, **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

## Connect to Einstein Activity Capture with User-Level Authentication

## EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

Available with Inbox in Sales Cloud, which is included in **Starter**, **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

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Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

The user-level authentication method is available for Microsoft Exchange on-premises servers and Microsoft Exchange Online with Office 365. After users are assigned to Einstein Activity Capture, they're prompted to connect a Microsoft account to Salesforce.

1. From Setup, in the Quick Find box, enter *Einstein Activity Capture*, and then select **Settings**. If it's your first time setting up Einstein Activity Capture, the setup flow guides you through the steps. If you already set up Einstein Activity Capture and want to change the authentication method, reset Einstein Activity Capture.
2. Select the email and calendar application that your company uses.
3. Select **User-Level Auth** as your authentication method.
4. Follow the remaining Einstein Activity Capture setup steps, including [creating a configuration and adding users to it](#) on page 377.
5. If you use a Microsoft Exchange on-premises server, make sure that you [allow the necessary network access](#).

Users are prompted to connect their account to Salesforce. Until they do, they can't send emails in Lightning Experience.

#### SEE ALSO:

[Admin Setup for Einstein Activity Capture](#)

[Connect Your Email and Calendar to Salesforce with Einstein Activity Capture or Inbox](#)

#### USER PERMISSIONS

To connect Salesforce to Exchange:

- Customize Application
- OR
- Modify All Data

To view the Einstein Activity Capture setup pages:

- View Setup and Configurations

Connect to Einstein Activity Capture with Org-Level OAuth 2.0

## EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

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Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

The org-level authentication method is available for only Microsoft Office 365. The Salesforce admin works with their Exchange admin to give Salesforce access to data in Microsoft Office 365. The connection applies to all users in Salesforce, which lets the admin set up all Einstein Activity Capture users at the same time.

1. From Setup, in the Quick Find box, enter *Einstein Activity Capture*, and then select **Settings**. If it's your first time setting up Einstein Activity Capture, the setup flow guides you through the steps. If you already set up Einstein Activity Capture and want to change the authentication method, reset Einstein Activity Capture.
2. Select Microsoft Office 365 as the email and calendar application.
3. Choose **Org-Level OAuth 2.0** as the authentication method.
4. Review the server URL that we'll redirect you to when you log in to your Microsoft Office 365 account.
5. Click **Log In** and enter your company's Office 365 account credentials. Then, accept Salesforce access to Microsoft Exchange Office 365.  
When you're done, we return you to the Einstein Activity Capture setup flow and populate the tenant ID field.
6. Optionally, check the connection between Salesforce and Microsoft Exchange Office 365.

When you use an org-level connection:

- Depending on how many Salesforce users you have, it can take anywhere from a few minutes to a few days to establish the connection. When ready, the connection is listed on each Einstein Activity Capture user's Connected Accounts page.
- Users who are in configurations with emails enabled are prompted to accept the Einstein Activity Capture terms of service. Until they do, email data isn't captured.
- Users who have access to Inbox must [connect an account](#) for Inbox to work. They can connect the primary account or a different account.
- Users can capture more data by connecting other accounts. The primary account is used to capture data through the org-level connection, so they don't need to connect it again.

SEE ALSO:

- [Test a User's Einstein Activity Capture Sync Status](#)
- [Admin Setup for Einstein Activity Capture](#)

#### USER PERMISSIONS

To connect Salesforce to Microsoft Office 365:

- Customize Application
- OR
- Modify All Data

To view the Einstein Activity Capture Setup pages:

- View Setup and Configurations

## Connect to Einstein Activity Capture with a Microsoft Exchange Service Account

The service account authentication method is available for Microsoft Office 365 and Microsoft Exchange on-premises servers. A service account lets you scope authentication to a specific set of users and set up all Einstein Activity Capture users at the same time. The Salesforce admin works with their Exchange admin to create a service account with the impersonation role and give Salesforce access to the service account user's data. Follow the steps based on the supported server that your company uses.

**!** **Important:** In February 2025, Microsoft is retiring the ApplicationImpersonation role in Exchange Online. As a result, Salesforce is retiring service account OAuth 2.0 access to Microsoft Office 365. To continue activity data capture, upgrade to org-level OAuth 2.0 authentication in Einstein Activity Capture settings. During the upgrade process, you're prompted to log in to your Office 365 tenant. Make sure you log in to the same tenant you used when creating the connection. If you don't, you have to reset your Einstein Activity Capture connection and start over. See [EAC to MS Office 365: Service Account OAuth 2.0 Retirement](#).

### [Preparing to Connect to Einstein Activity Capture with a Microsoft Exchange Service Account](#)

Before you can set up Einstein Activity Capture using the service account connection method, make sure that you work with your Exchange admin to get things ready on the Microsoft side.

### [Use a Service Account to Connect Microsoft Office 365 and Einstein Activity Capture](#)

If your company uses Microsoft Office 365, you can connect to Einstein Activity Capture using a service account. The Salesforce admin works with their Exchange admin to create a service account with the impersonation role and give Salesforce access to the service account user's data. By using a service account, you can scope authentication to a specific set of users and set up all Einstein Activity Capture users at the same time.

### [Use a Service Account to Connect an Exchange Server and Einstein Activity Capture](#)

If your company uses Microsoft Exchange 2019, 2016, or 2013 on-premises, you can connect to Einstein Activity Capture using a service account. The Salesforce admin works with their Exchange admin to create a service account with the impersonation role and give Salesforce access to the service account user's data. By using a service account, you can scope authentication to a specific set of users and set up all Einstein Activity Capture users at the same time.

#### SEE ALSO:

[Preparing to Connect to Einstein Activity Capture with a Microsoft Exchange Service Account Admin Setup for Einstein Activity Capture](#)

#### EDITIONS

Available in: **Lightning Experience**

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter, Professional, Enterprise, Performance,** and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

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Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

## Preparing to Connect to Einstein Activity Capture with a Microsoft Exchange Service Account

Before you can set up Einstein Activity Capture using the service account connection method, make sure that you work with your Exchange admin to get things ready on the Microsoft side.

 **Tip:** For help with preparing your Exchange server, visit Microsoft's support website and search for the keywords mentioned here.

Here's what your Exchange admin must do before you can set up Einstein Activity Capture.

- Create an Exchange user with a mailbox that acts as the service account.
- Grant the impersonation role to a service account.

 **Important:** In February 2025, Microsoft is retiring the ApplicationImpersonation role in Exchange Online. As a result, Salesforce is retiring service account OAuth 2.0 access to Microsoft Office 365. To continue activity data capture, upgrade to org-level OAuth 2.0 authentication in Einstein Activity Capture settings. During the upgrade process, you're prompted to log in to your Office 365 tenant. Make sure you log in to the same tenant you used when creating the connection. If you don't, you have to reset your Einstein Activity Capture connection and start over. See [EAC to MS Office 365: Service Account OAuth 2.0 Retirement](#).

- Decide which users the service account has access to.
- Enable Exchange Web Services (EWS) on an SSL connection.

### SEE ALSO:

[Use a Service Account to Connect Microsoft Office 365 and Einstein Activity Capture](#)

[Use a Service Account to Connect an Exchange Server and Einstein Activity Capture](#)

## EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

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## Use a Service Account to Connect Microsoft Office 365 and Einstein Activity Capture

### EDITIONS

Available in: Lightning Experience

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Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

If your company uses Microsoft Office 365, you can connect to Einstein Activity Capture using a service account. The Salesforce admin works with their Exchange admin to create a service account with the impersonation role and give Salesforce access to the service account user's data. By using a service account, you can scope authentication to a specific set of users and set up all Einstein Activity Capture users at the same time.

1. Before you do anything in Salesforce, [work with your Exchange admin to set up the service account](#).

 **Important:** In February 2025, Microsoft is retiring the ApplicationImpersonation role in Exchange Online. As a result, Salesforce is retiring service account OAuth 2.0 access to Microsoft Office 365. To continue activity data capture, upgrade to org-level OAuth 2.0 authentication in Einstein Activity Capture settings. During the upgrade process, you're prompted to log in to your Office 365 tenant. Make sure you log in to the same tenant you used when creating the connection. If you don't, you have to reset your Einstein Activity Capture connection and start over. See [EAC to MS Office 365: Service Account OAuth 2.0 Retirement](#).

2. From Setup, in the Quick Find box, enter *Einstein Activity Capture*, and then select **Settings**. If it's your first time setting up Einstein Activity Capture, the setup flow guides you through the steps. If you already set up Einstein Activity Capture and want to change the authentication method, reset Einstein Activity Capture.
3. Select **Microsoft Office 365** as the email and calendar application.
4. Select **Service Account OAuth 2.0** as your authentication method.
5. Follow the setup flow, including steps for creating a configuration and adding users to it.
6. When you finish the main setup steps, it's time to give Salesforce access to Microsoft Exchange Office 365. Click **Log In**, and log in with the service account username and password. Then, accept Salesforce access to Microsoft Exchange Office 365.  
When you're done, we return you to the Einstein Activity Capture setup flow.
7. Optionally, check the connection between Salesforce and Microsoft Exchange Office 365.

 **Note:** When you use a service account, users who are in configurations that capture email data are prompted to accept the Einstein Activity Capture terms of service. Until they do so, email data isn't captured.

#### SEE ALSO:

- [Test a User's Einstein Activity Capture Sync Status](#)
- [Test Whether Users Are Visible by Your Service Account](#)
- [Admin Setup for Einstein Activity Capture](#)

#### USER PERMISSIONS

To connect Salesforce to Microsoft Office 365:

- Customize Application  
OR Modify All Data

To view the Einstein Activity Capture setup pages:

- View Setup and Configurations

## Use a Service Account to Connect an Exchange Server and Einstein Activity Capture

### USER PERMISSIONS

To connect Salesforce to a Microsoft Exchange server:

- Customize Application  
OR Modify All Data

To view the Einstein Activity Capture setup pages:

- View Setup and Configurations

If your company uses Microsoft Exchange 2019, 2016, or 2013 on-premises, you can connect to Einstein Activity Capture using a service account. The Salesforce admin works with their Exchange admin to create a service account with the impersonation role and give Salesforce access to the service account user's data. By using a service account, you can scope authentication to a specific set of users and set up all Einstein Activity Capture users at the same time.

1. Make sure that your Exchange server is visible to Salesforce by [allowing the necessary network access](#).
  2. Before you set up Einstein Activity Capture, [work with your Exchange admin to set up the service account](#).
  3. From Setup, in the Quick Find box, enter *Einstein Activity Capture*, and then select **Settings**. If it's your first time setting up Einstein Activity Capture, the setup flow guides you through the steps. If you already set up Einstein Activity Capture and want to change the authentication method, reset Einstein Activity Capture.
  4. Select **Microsoft Exchange** as the email and calendar application.
  5. Select **Service Account** as your authentication method.
  6. To give Salesforce access to the Exchange service account, follow the steps.
    - a. Enter the login credentials for your company's Microsoft Exchange service account.
    - b. If your sales reps have different email domains than your service account domain, enter the additional domains in a comma-separated list.
    - c. To test that the Microsoft Exchange service account is set up properly, enter a user who the service account has access to.
  7. Follow the remaining Einstein Activity Capture setup steps, including creating a configuration and adding users to it.
-  **Note:** When you use a service account, users who are in configurations with emails enabled are prompted to accept the Einstein Activity Capture terms of service. Until they do so, email data isn't captured.

#### SEE ALSO:

- [Test a User's Einstein Activity Capture Sync Status](#)
- [Test Whether Users Are Visible by Your Service Account](#)
- [Admin Setup for Einstein Activity Capture](#)

#### EDITIONS

Available in: Lightning Experience

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Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

## Connect Salesforce to Your Microsoft Exchange Endpoint

## EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

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Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

If your Exchange Web Service (EWS) isn't exposed externally because the Microsoft Autodiscover setting isn't on, Einstein Activity Capture or Inbox can't find your Microsoft Exchange account. Manually connect your Microsoft Exchange endpoint to Salesforce so that your Microsoft Exchange users can benefit from Einstein Activity Capture or Inbox.

1. Make sure that Einstein Activity Capture or Inbox is enabled.
2. From Setup, in the Quick Find box, enter *Microsoft Exchange Connections*, and then select **Microsoft Exchange Connections**.
3. Click **New**, and then enter the connection details.
4. We recommend that you verify the connection. Enter a Microsoft Exchange email and password, and then click **Verify**.
5. Save the connection.

#### USER PERMISSIONS

To create a Microsoft Exchange connection:

- Customize Application OR Modify All Data

#### SEE ALSO:

[Admin Setup for Einstein Activity Capture](#)

[Use a Service Account to Connect an Exchange Server and Einstein Activity Capture](#)

#### Allowing Network Access When Using Einstein Activity Capture with a Microsoft Exchange Server

When setting up Einstein Activity Capture with a Microsoft Exchange on-premises server (2019, 2016, or 2013), make sure that you allow the necessary network access.

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 in **Professional, Enterprise, Performance**, and **Unlimited** Editions

Available with Sales Engagement, which is available for an extra cost in: **Enterprise, Performance**, and **Unlimited** Editions

#### Inbound Connections

If an IP or VPN restricts the Exchange Web Services (EWS) endpoint, you must add the following addresses to your allowlist. Doing so ensures that your Exchange server is visible to Salesforce.

 **Note:** Starting in late 2023, Einstein Activity Capture services are migrating to Hyperforce, the Salesforce cloud-native infrastructure architecture, built for the public cloud. Before migration to Hyperforce, Einstein Activity Capture data is stored in Salesforce managed data centers and hosted on Amazon Web Services (AWS) behind a Virtual Private Cloud (VPC). After migration, the Einstein Activity Capture data and services are stored on Hyperforce and new AWS public cloud infrastructure, within the same region as before.

 **Important:** To ensure uninterrupted access of your Einstein Activity Capture services and data, add both sets of IP addresses to your allowlist.

	If Your Salesforce Instance Is Outside of Europe	If Your Salesforce Instance Is in Europe
Hyperforce	<ul style="list-style-type: none"> <li>• 44.242.15.232</li> <li>• 44.236.183.129</li> </ul>	<ul style="list-style-type: none"> <li>• 18.158.21.76</li> <li>• 3.76.67.243</li> </ul>

	<b>If Your Salesforce Instance Is Outside of Europe</b>	<b>If Your Salesforce Instance Is in Europe</b>
	<ul style="list-style-type: none"> <li>• 100.21.196.196</li> <li>• 54.200.249.136</li> <li>• 44.228.8.56</li> <li>• 35.165.2.200</li> </ul>	<ul style="list-style-type: none"> <li>• 18.158.241.92</li> <li>• 3.76.75.66</li> <li>• 52.57.103.81</li> <li>• 3.72.121.255</li> </ul>
Pre-Hyperforce	<ul style="list-style-type: none"> <li>• 54.200.130.205</li> <li>• 54.218.59.121</li> <li>• 34.210.91.105</li> <li>• 34.210.91.103</li> <li>• 44.224.62.36</li> <li>• 52.35.129.120</li> <li>• 54.71.145.62</li> <li>• 35.166.120.106</li> <li>• 44.224.71.98</li> <li>• 52.35.232.62</li> <li>• 54.68.117.123</li> <li>• 52.26.6.102</li> <li>• 35.163.187.73</li> <li>• 52.36.92.175</li> <li>• 34.210.91.106</li> <li>• 34.210.91.104</li> <li>• 35.166.17.212</li> <li>• 34.216.184.173</li> <li>• 34.210.91.108</li> <li>• 34.210.91.107</li> </ul>	<ul style="list-style-type: none"> <li>• 52.59.28.245</li> <li>• 52.28.30.206</li> <li>• 52.57.191.228</li> <li>• 18.194.116.65</li> <li>• 52.57.191.229</li> <li>• 18.184.19.133</li> <li>• 52.57.191.226</li> <li>• 52.57.191.224</li> <li>• 52.57.191.227</li> <li>• 18.197.233.154</li> <li>• 18.196.51.181</li> <li>• 3.124.138.13</li> <li>• 3.124.208.146</li> <li>• 3.124.224.62</li> <li>• 3.124.238.55</li> </ul>

Depending on how you set up Salesforce, it can be necessary to add Salesforce IP addresses that aren't specific to EWS or Einstein Activity Capture to your allowlist. To ensure continued access to Salesforce features, see [Salesforce IP Addresses and Domains to Allow](#).

### Outbound Connections

If you have restrictions on Exchange outbound connections, you must allow outbound access to the following domains. Then, when new emails and events arrive in Exchange, push notifications are sent to Salesforce. To ensure uninterrupted access of your Einstein Activity Capture services and data, add both sets of webhook endpoints to your org.

	<b>If Your Salesforce Instance Is Outside of Europe</b>	<b>If Your Salesforce Instance Is in Europe</b>
Hyperforce	apiq-ews-webhook-c01.sfdc-lywfpd.svc.sfdcfc.net	apiq-ews-webhook-c01.sfdc-yzvd4.svc.sfdcfc.net

	<b>If Your Salesforce Instance Is Outside of Europe</b>	<b>If Your Salesforce Instance Is in Europe</b>
Pre-Hyperforce	ews-webhook-us1-prod.salesforceiq.com	ews-webhook-eu1-prod.salesforceiq.com

## SEE ALSO:

[Connect to Einstein Activity Capture with User-Level Authentication](#)

[Use a Service Account to Connect an Exchange Server and Einstein Activity Capture](#)

## Connection Methods for Google

Before Einstein Activity Capture can access users' email and calendar data, you must connect Salesforce to Google.

### [Connect to Einstein Activity Capture with User-Level Authentication](#)

The user-level authentication method is available for Google. After users are assigned to Einstein Activity Capture, they must connect a Google account to Salesforce.

### [Connect to Einstein Activity Capture with a Google Workspace Marketplace App](#)

You can use the Salesforce Einstein Activity Capture app on Google Workspace Marketplace as an authentication method. This method provides controlled access to your Google servers while letting you manage users directly in the Google Workspace Marketplace app.

### [Connect to Einstein Activity Capture with a Google Service Account](#)

The service account authentication method is available for Google. A service account lets you set up all Einstein Activity Capture users simultaneously. That way, users don't need to connect their primary account. Salesforce provides the service account details for you. Then, the Salesforce admin works with their Google admin to give the service account domain-wide authority and access to your users' Google data.

#### SEE ALSO:

[Admin Setup for Einstein Activity Capture](#)

[Einstein Activity Capture System Requirements](#)

#### EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

Available with Inbox in Sales Cloud, which is included in **Starter**, **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

## Connect to Einstein Activity Capture with User-Level Authentication

## EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

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Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

The user-level authentication method is available for Google. After users are assigned to Einstein Activity Capture, they must connect a Google account to Salesforce.

1. From Setup, in the Quick Find box, enter *Einstein Activity Capture*, and then select **Settings**. If it's your first time setting up Einstein Activity Capture, the setup flow guides you through the steps. If you already set up Einstein Activity Capture and want to change the authentication method, reset Einstein Activity Capture.
2. Select **Google** as the email and calendar application.
3. Select **User-Level Auth** as your authentication method.
4. Follow the remaining Einstein Activity Capture setup steps, including [creating a configuration and adding users to it](#) on page 377.

Users must connect their account to Salesforce. Until they do, they can't send emails in Lightning Experience.

#### SEE ALSO:

[Admin Setup for Einstein Activity Capture](#)

[Connect Your Email and Calendar to Salesforce with Einstein Activity Capture or Inbox](#)

#### USER PERMISSIONS

To connect Salesforce to Google:

- Customize Application

OR

Modify All Data

To view the Einstein Activity Capture setup pages:

- View Setup and Configurations

Connect to Einstein Activity Capture with a Google Workspace Marketplace App

## EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

Available with Inbox in Sales Cloud, which is included in **Starter**, **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

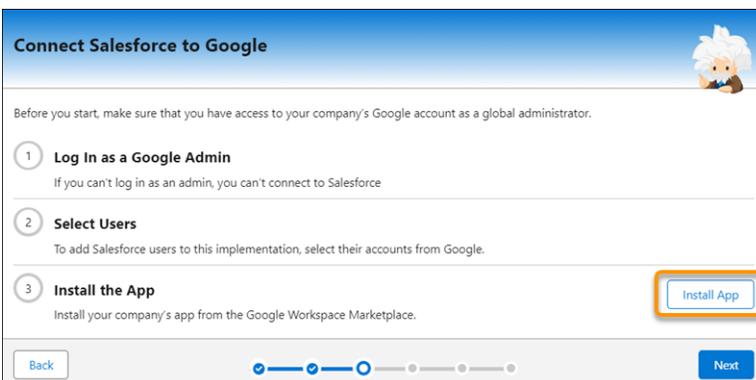
Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

You can use the Salesforce Einstein Activity Capture app on Google Workspace Marketplace as an authentication method. This method provides controlled access to your Google servers while letting you manage users directly in the Google Workspace Marketplace app.

Before you start, make sure that you have global administrator access to your company's Google account. As a Google global administrator, you directly control what data this Einstein Activity Capture integration can access, and for whom.

1. Log in to Google Workspace Admin console at <https://admin.google.com/>.
2. In Google Workspace Admin console, create an access group to contain the Einstein Activity Capture users if you don't have one already.
3. In the Google access group, add the members that have the user accounts that you want to integrate with Einstein Activity Capture.
4. In Salesforce Setup, in the Quick Find box, enter *Einstein Activity Capture*, and then select **Settings**. If it's your first time setting up Einstein Activity Capture, the setup flow guides you through the steps. If you already set up Einstein Activity Capture and want to change the authentication method, reset Einstein Activity Capture.
5. Select **Google G Suite** as the email and calendar application.
6. Select **Google Workspace Marketplace App** as your authentication method.
7. Click **Install App** to install the Einstein Activity Capture app from Google Workspace Marketplace.



8. In Google Workspace, select **Admin install** and then **Continue**.
9. Install the app only for the access group you created in step 2. In Google Workspace, select **Certain groups or organizational units** and follow the prompts to select and save your access group selection.
10. In Salesforce, click **Next**.
11. Follow the remaining Einstein Activity Capture setup steps, including [creating a configuration and adding users to it](#) on page 377.

When you use the Google Workspace Marketplace app authentication method:

- It can take up to 24 hours to establish the connection with your Google Workspace environment. When ready, the connection is listed on each Einstein Activity Capture user's Connected Accounts page.
- Users who are in configurations with emails enabled are prompted to accept the Einstein Activity Capture terms of service. Until they do, email data isn't captured.
- Users who have access to Inbox must [connect an account](#) for Inbox to work. Users can connect their primary account or a different account.

## USER PERMISSIONS

To connect Salesforce to Google:

- Customize Application

OR

Modify All Data

To view the Einstein Activity Capture setup pages:

- View Setup and Configurations

Connect to Einstein Activity Capture with a Google Service Account

## EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

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Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

The service account authentication method is available for Google. A service account lets you set up all Einstein Activity Capture users simultaneously. That way, users don't need to connect their primary account. Salesforce provides the service account details for you. Then, the Salesforce admin works with their Google admin to give the service account domain-wide authority and access to your users' Google data.

1. From Setup, in the Quick Find box, enter *Einstein Activity Capture*, and then select **Settings**. If it's your first time setting up Einstein Activity Capture, the setup flow guides you through the steps. If you already set up Einstein Activity Capture and want to change the authentication method, reset Einstein Activity Capture.
2. Select **Google** as the email and calendar application.
3. Select **Service Account** as your authentication method.
4. To give Salesforce domain-wide authority, read access, and write access to your users' Google data, copy the service account client ID and comma-delimited list of the OAuth scopes from the setup flow. Then, navigate to your Google Admin Console and add the service account client ID and OAuth scopes to your Google Workspace environment. See the [Google documentation about delegating domain-wide authority to a service account](#).
5. Follow the remaining Einstein Activity Capture setup steps, including [creating a configuration and adding users to it](#) on page 377.

When you use the Google service account authentication method:

- It can take up to 24 hours to establish the connection with your Google Workspace environment. When ready, the connection is listed on each Einstein Activity Capture user's Connected Accounts page.
- Users who are in configurations with emails enabled are prompted to accept the Einstein Activity Capture terms of service. Until they do, email data isn't captured.
- Users who have access to Inbox must [connect an account](#) for Inbox to work. Users can connect their primary account or a different account.

#### SEE ALSO:

- [Test a User's Einstein Activity Capture Sync Status](#)
- [Test Whether Users Are Visible by Your Service Account](#)
- [Admin Setup for Einstein Activity Capture](#)

#### USER PERMISSIONS

To connect Salesforce to Google:

- Customize Application
- OR
- Modify All Data

To view the Einstein Activity Capture Setup pages:

- View Setup and Configurations

## Create a Configuration for Einstein Activity Capture

## EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

Available with Inbox in Sales Cloud, which is included in **Starter**, **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

Einstein Activity Capture configurations define how data flows between Salesforce and the connected accounts. By default, everything is enabled and moving in both directions, when applicable, but you can change the default settings.

1. From Setup, enter *Einstein Activity Capture* in the Quick Find box, and then select **Settings**.

If it's your first time setting up Einstein Activity Capture, the setup flow guides you through the steps. If you're moving from Lightning Sync or you already use Einstein Activity Capture but it's your first time creating a configuration, click **Add Contact and Event Sync**, and then follow the guided steps.

2. From the Configuration tab, click **New Configuration**.
3. Give the configuration a name and description.
4. Review the email, events, and contact settings, and then click **Next**.

 **Tip:**

- If you sync contacts, we recommend that you [export your contact data on a regular basis](#).
- If you sync contacts both ways, you can improve sync performance by setting the contact filter to `Contacts Users Own`.
- If you sync events, we recommend that users [prepare events that they don't want to sync](#) before you activate the configuration.

5. Review the advanced settings for emails, events, and contacts.
6. Add users and profiles to the configuration, and then click **Next**.

To add users to a configuration, make sure that you first [assign users to Einstein Activity Capture](#). If you're migrating from Lightning Sync, you can add users who show [Lightning Sync] after their name to an Einstein Activity Capture configuration. To give these users access to Einstein Activity Capture features, you must assign them to Einstein Activity Capture and turn off Lightning Sync.

Up to 500 users or profiles are visible at a time. To add more than 500 users directly or via profile at a time, or to edit user assignments when the configuration has more than 500 users, [use the UserEmailCalendarSync object](#) via the API.

If a user is added to configurations at the user level and at the profile level, the user-level assignment is recognized.

SEE ALSO:

[Considerations for Setting Up Einstein Activity Capture](#)

[Considerations for Disabling Emails, Events, or Contacts in Einstein Activity Capture](#)

[Select Who Can Use Einstein Activity Capture](#)

[Set Up Einstein Activity Capture](#)

## USER PERMISSIONS

To create or edit an Einstein Activity Capture configuration:

- View Setup and Configurations, Customize Application AND Modify All Data

To view the Einstein Activity Capture setup pages:

- View Setup and Configurations

## Exclude Certain Emails and Events from Being Added to Salesforce

## EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

Available with Inbox in Sales Cloud, which is included in **Starter**, **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

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 the activity timeline of related Salesforce records. Events aren't added to the Salesforce calendar. And events aren't synced between Salesforce and the connected accounts. Your Excluded Addresses list applies to all Einstein Activity Capture users. Users can add more email addresses to their own Excluded Addresses lists.

1. From Setup, enter *Einstein Activity Capture* in the Quick Find box, and then select **Settings**.
2. Click the **Excluded Addresses** tab.
3. Click **Add**.
4. Follow the prompts to update the Excluded Addresses list.

#### SEE ALSO:

[Considerations for Excluding Data from Einstein Activity Capture](#)  
[Exclude Emails and Events from Being Added to Salesforce Einstein Activity Capture](#)

#### USER PERMISSIONS

To update the Excluded Addresses list:

- Customize Application OR Modify All Data

To view the Excluded Addresses list:

- View Setup and Configurations

## Set Default Activity Sharing for Einstein Activity Capture Users

## EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

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Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

Select whether Einstein Activity Capture users share their emails and events with other users or keep them private. Users can change their activity sharing at any time from their personal settings.

 **Note:** Some Sales Cloud Einstein features generate business-related insights using emails captured by Einstein Activity Capture, including emails that aren't shared. However, the content of the emails and the usernames associated with them are hidden. Einstein Opportunity Insights and Einstein Automated Contacts are the Sales Cloud Einstein features that use these private emails.

1. From Setup, in the Quick Find box, enter *Einstein Activity Capture*, and then select **Settings** under Einstein Activity Capture.
2. Click the **Settings** tab.
3. Click **Edit Default** next to **Default Activity Sharing for New Users**.
4. Select a default option for new users.

When activities are shared with everyone, others see full email and event details. When activities aren't shared with everyone, others see basic details, such as dates and names, and can request full access from the activity owner. "Everyone" means all Salesforce users at your company, but you can change it to mean only Einstein Activity Capture users. Go to the Settings tab within the Einstein Activity Capture settings.

5. Click **Save**.  
When new users connect their account to Salesforce with Einstein Activity Capture, the activity sharing that you selected is their default. Users who already connected their account to Salesforce aren't affected.
6. If you set the default sharing setting to Don't Share, you can prevent new users, regardless of their own sharing settings, from changing it. From the Settings tab, turn on the **Enforce Default Activity Sharing for New Users** setting. Users can still share individual emails and events, and respond to sharing requests from other users.
7. If you set the default sharing setting to Share with Everyone, emails that are identified as automated replies or having sensitive content are kept private. This protects users from inadvertently sharing sensitive information. The email owner can later change the sharing setting to something less restrictive. If you want automated replies and sensitive emails to be shared, go to the Settings tab and turn off the **Prevent Automated Emails from Being Shared** and the **Prevent Sensitive Emails from Being Shared** settings.

SEE ALSO:

[Control How Activities Added by Einstein Activity Capture Are Shared](#)  
[Einstein Activity Capture](#)

## USER PERMISSIONS

To set default activity sharing for new users:

- [Customize Application OR Modify All Data](#)

To view the Einstein Activity Capture setup pages:

- [View Setup and Configurations](#)

## Let Users Share Activities with Groups

## EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

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Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

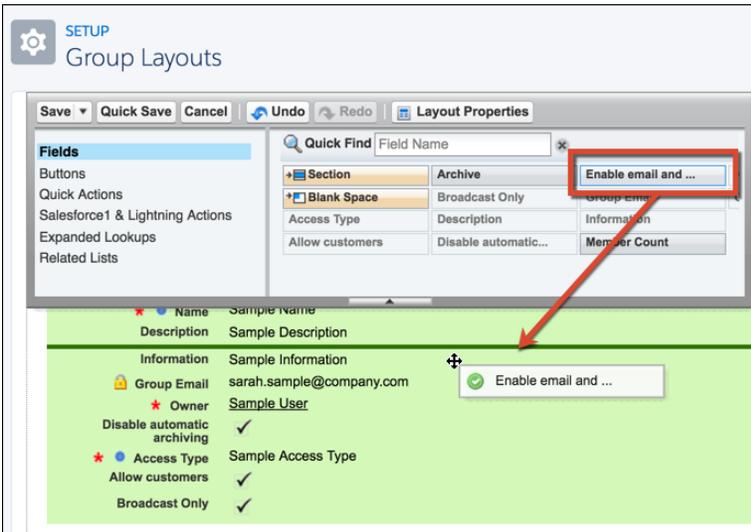
Add the `Enable email and event sharing` field to group layouts. When the setting is selected on a private or unlisted Chatter group, the group members who use Einstein Activity Capture can share activities with all group members.

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.

## 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 all group members. Email and events appear in the activity timeline of related records, not in Chatter group feeds. When a user shares an individual email or event with a Chatter group and then deletes the group, the setting for the individual email or event is removed.

SEE ALSO:

[Control How Activities Added by Einstein Activity Capture Are Shared](#)

[Set Up a Group for Sharing Activities](#)

## Enable More Features for Einstein Activity Capture and Inbox

Einstein Email Insights and Recommended Connections make it easy for sales reps to move deals in the right direction.

### [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 Performance or Unlimited editions or a Sales Cloud Einstein, Inbox, Sales Engagement, or Revenue Intelligence license, Email Insights is on by default when you turn on Einstein Activity Capture. If you have only Standard Einstein Activity Capture users, you must turn on Einstein Email Insights.

### [Create Custom Einstein Email Insights](#)

Einstein Email Insights give sales reps critical sales context alongside relevant inbound emails. You can get the most relevant email insights by specifying what to look for in email content.

### [Add Recommended Connections to Lightning Pages](#)

Give sales reps access to the Recommended Connections component so they can see which colleagues have the strongest connections to a prospect. Reps can then get in touch with colleagues who can help get conversations going with prospects.

## EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

Available with Inbox in Sales Cloud, which is included in **Starter**, **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

Turn On Einstein Email Insights

#### EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

Available with Inbox in Sales Cloud, which is included in **Starter**, **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

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 Performance or Unlimited editions or a Sales Cloud Einstein, Inbox, Sales Engagement, or Revenue Intelligence license, Email Insights is on by default when you turn on Einstein Activity Capture. If you have only Standard Einstein Activity Capture users, you must turn on Einstein Email Insights.

#### USER PERMISSIONS

To turn on Einstein Email Insights:

- [Customize Application](#)

 **Note:** Einstein Email Insights is available only in English.

1. Make sure you add your users to an Einstein Activity Capture configuration with emails enabled. If you re-enable emails, your users don't see email insights from the time when email was disabled.
2. From Setup, in the Quick Find box, enter *Einstein Activity Capture*, and then select **Einstein Email Insights**.
3. Set **Show Insights** to On.
  - Sales reps who use Einstein Activity Capture see email insights, when available, in the activity timeline and email detail page. If your reps also use Inbox, they see email insights in their inbox.
  - Email insights are available for emails sent to Einstein Activity Capture users. Email insights aren't available for emails sent from Einstein Activity Capture users.
  - When Einstein Activity Capture activities are shared with everyone, reps who don't use Einstein Activity Capture see email insights.
  - If you use Einstein Activity Capture through Performance or Unlimited editions or a Sales Cloud Einstein, Inbox, Sales Engagement, or Revenue Intelligence license, you can [create custom email insights](#) on page 388.

#### SEE ALSO:

[Create Custom Einstein Email Insights](#)

[What Is Einstein Activity Capture Standard?](#)

## Create Custom Einstein Email Insights

Einstein Email Insights give sales reps critical sales context alongside relevant inbound emails. You can get the most relevant email insights by specifying what to look for in email content.

 **Note:** Einstein Email Insights is available only in English.

1. From Setup, in the Quick Find box, enter *Einstein Activity Capture*, and then select **Einstein Email Insights**.
  2. Click **New**.
  3. Enter an insight label and description.  
The description appears when users hover over the label in the activity timeline.  
If you update an insight name or description for active and inactive email insights, existing labels and descriptions are updated.
  4. Enter up to 10 sets of keywords and choose whether the search is case-sensitive. Confirm that the insight is enabled.  
You can have up to 10 active insights.
  5. Select any standard insights you want to combine with your custom insight.  
There's an "and" condition between the custom insight and standard insights you select to combine with your custom insight. For the insight to be generated, the email must contain at least one defined keyword and a selected standard insight.
  6. Enable the insight, if you want it to be active.
  7. Click **Save Draft** or **Save & Apply**.  
Sales reps see custom email insights, when available, in the activity timeline and the email detail page.
-  **Example:** If you're in the automotive industry, you can customize an email insight to look for words like *car*, *auto*, *drive*, and *race* in emails.

### SEE ALSO:

[Turn On Einstein Email Insights](#)

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

Available with Inbox, which is available in **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Sales Engagement, which is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

### USER PERMISSIONS

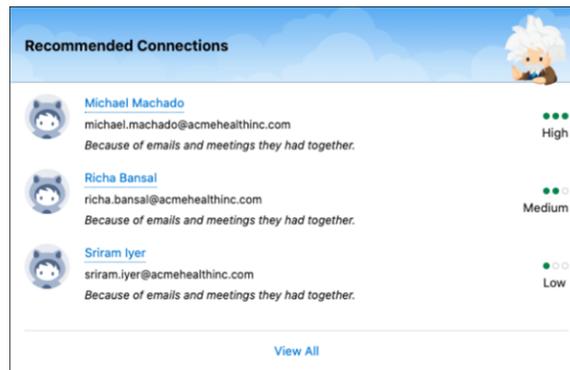
To create custom Einstein Email Insights:

- Customize Application

## Add Recommended Connections to Lightning Pages

Give sales reps access to the Recommended Connections component so they can see which colleagues have the strongest connections to a prospect. Reps can then get in touch with colleagues who can help get conversations going with prospects.

1. From Setup, in the Quick Find box, enter *Einstein Activity Capture*, and then select **Recommended Connections**.
2. Turn on the option to add the Recommended Connections component to standard contact and lead page layouts. If you use person accounts, the component is also added to standard person account page layouts.
3. To add the Recommended Connections component to custom contact, lead, and person account page layouts, use the Lightning App Builder.
4. Optionally, use the Lightning App Builder to set the number of connections to show by default in the component. You can set the number from 1 through 10. When a user clicks **View All** from the component, they can see up to 50 connections.



### SEE ALSO:

[Admin Setup for Einstein Activity Capture](#)

[Create and Configure Lightning Experience Record Pages](#)

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud Einstein, which is available for an extra cost in:

**Enterprise, Performance,** and **Unlimited** Editions

Available with Inbox, which is available in **Professional, Enterprise, Performance,** and **Unlimited** Editions

Available with Sales Engagement, which is available for an extra cost in: **Enterprise, Performance,** and **Unlimited** Editions

### USER PERMISSIONS

To edit page layouts:

- Customize Application

## End-User Setup for Einstein Activity Capture

Connect email and calendar accounts to Salesforce and control how activities are shared. Plus, prevent specific emails and events from being synced and added to the activity timeline.

Watch a Demo: [▶ How Users Set Up Einstein Activity Capture](#) (English only)

 **Tip:** If your admin enabled Inbox, you also have access to some or all Inbox features.

### [Connect Your Email and Calendar to Salesforce with Einstein Activity Capture or Inbox](#)

Depending on how your Salesforce admin set up Einstein Activity Capture, it's possible that you're responsible for connecting your Microsoft or Gmail account to Salesforce. If you use Lightning Email and have access to Inbox features, you must connect an account to Salesforce.

### [Preparing to Sync Events with Einstein Activity Capture](#)

If your Salesforce admin configured Einstein Activity Capture to sync events, review our suggestions for making sure it works the way you want.

### [Preparing to Sync Contacts with Einstein Activity Capture](#)

If your Salesforce admin configured Einstein Activity Capture to sync contacts, review our suggestions for making sure it works the way you want.

### [Exclude Emails and Events from Being Added to Salesforce](#)

When you add email addresses to your Excluded Addresses list, emails and events with those people aren't added to the activity timeline of related Salesforce records. Events aren't added to the Salesforce calendar. And events aren't synced between Salesforce and the connected accounts.

### [Control How Activities Added by Einstein Activity Capture Are Shared](#)

Choose how to share activities that Einstein Activity Capture adds to the activity timeline of related Salesforce records. You can share with all users, Chatter groups, or no one.

### [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 all group members.

#### SEE ALSO:

[Einstein Activity Capture](#)

[Salesforce Inbox](#)

[Sales Engagement](#)

[Salesforce Meetings](#)

#### EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

Available with Inbox in Sales Cloud, which is included in **Starter**, **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

## Connect Your Email and Calendar to Salesforce with Einstein Activity Capture or Inbox

## EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

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Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

Depending on how your Salesforce admin set up Einstein Activity Capture, it's possible that you're responsible for connecting your Microsoft or Gmail account to Salesforce. If you use Lightning Email and have access to Inbox features, you must connect an account to Salesforce.

1. From your personal settings, in the Quick Find box, enter *Connected Accounts*, and then select **Email and Calendar Accounts**.  
If your admin connected an account for you, it's listed under Connected Accounts. If it's not, try refreshing the page.
2. Click **New Account**.

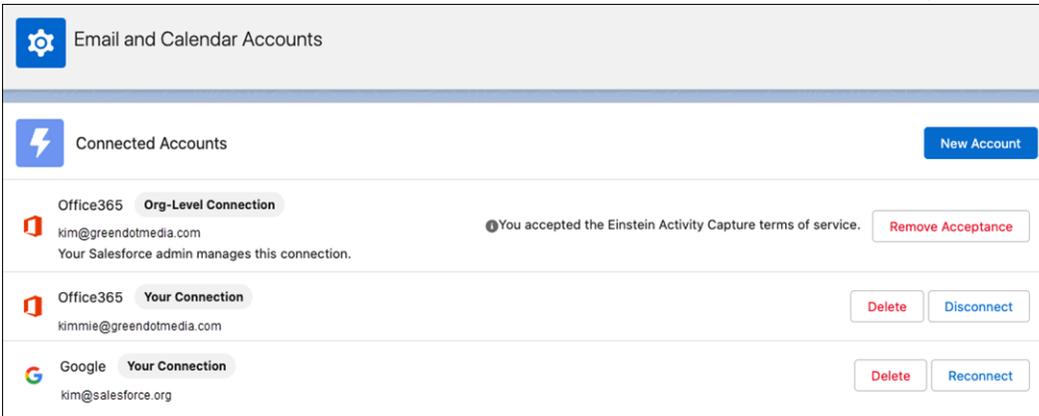
#### USER PERMISSIONS

To connect an account with Einstein Activity Capture:

- Use Einstein Activity Capture

To connect an account with Inbox:

- Use Inbox



3. Follow the steps to connect your 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. Inbox features are available right away.
  - If your admin didn't connect your account for you but added you to an Einstein Activity Capture configuration that includes syncing, make sure that:
    - Your primary account, which is the email account on your user record, is in the user principal name (UPN) format and connected to Salesforce.
    - The account that you connect is the same email and calendar service that your admin connected to Salesforce. For example, if your admin connects Microsoft Exchange, you must connect a Microsoft Exchange account.
  - If your admin connected your account for you through an org-level connection and you have access to Inbox, you must connect an account for Inbox to work. You can connect the primary account or a different account.
  - All users can capture more data by connecting other accounts. However, if your admin connected your account for you through an org-level connection, the primary account is used to capture data through the org-level connection, so you don't connect it again.
  - When you disconnect an account, it doesn't appear as disconnected until you log out of Salesforce and then log in again.

- When you delete an account, the data captured from that account is removed from Salesforce. If you connect the wrong account or run into problems with Inbox features, such as emails not tracking or available times not updating, we recommend that you delete the connected account. Then, connect it again as a new account.

**SEE ALSO:**

[Emails and Einstein Activity Capture](#)

[Events and Einstein Activity Capture](#)

[Contacts and Einstein Activity Capture](#)

[Review the Activities Analytics Dashboard](#)

## Preparing to Sync Events with Einstein Activity Capture

If your Salesforce admin configured Einstein Activity Capture to sync events, review our suggestions for making sure it works the way you want.

Prepare events that you don't want to sync before your admin turns on your Einstein Activity Capture configuration. You can manage which events sync at any time. To remove synced events from Salesforce, manually delete them.

Here are ways to prevent personal events from syncing from your Google or Microsoft calendar to Salesforce.

- To track personal events, create a separate calendar in your Google or Microsoft calendar application. Einstein Activity Capture is designed to sync only a reps' default calendar to Salesforce.
- When Salesforce admins define sync settings in Einstein Activity Capture configurations, they choose whether to sync users' private events. Users can also prevent events from syncing by assigning the private option to events from their calendar applications.
- Add email addresses to your Excluded Addresses list. Events associated with email addresses on the Excluded Addresses list aren't synced between Salesforce and the connected accounts. Also, if you're in a configuration that captures emails and events, emails and events associated with those email address aren't added to the activity timeline of related Salesforce records. Events aren't added to the Salesforce calendar.

### SEE ALSO:

[Events and Einstein Activity Capture](#)

### EDITIONS

Available in: **Lightning Experience**

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter, Professional, Enterprise, Performance, and Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance and Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

Available with Inbox in Sales Cloud, which is included in **Starter, Performance and Unlimited** Editions and available for an extra cost in **Professional and Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Sales Engagement in Sales Cloud, which is included in **Performance and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise and Unlimited** Editions

## Preparing to Sync Contacts with Einstein Activity Capture

If your Salesforce admin configured Einstein Activity Capture to sync contacts, review our suggestions for making sure it works the way you want.

### Microsoft Exchange

After you're set up to sync contacts, Einstein Activity Capture creates a folder called Salesforce\_Sync in your connected Microsoft account's contact directory. Your contacts sync between the Salesforce\_Sync folder and Salesforce. Don't rename, move, or delete the Salesforce\_Sync folder. If you delete the folder, contacts stop syncing between your connected account and Salesforce.

If you're set up to sync from Salesforce to Microsoft Exchange only, no more setup is required. Your contacts are syncing from Salesforce to your Salesforce\_Sync folder.

If you're set up to sync from Microsoft Exchange to Salesforce or both ways, move the contacts that you want to sync to Salesforce into the Salesforce\_Sync folder. Salesforce recommends that you keep syncing contacts only in the Salesforce\_Sync folder. If you have the same contact in both the Salesforce\_Sync folder and your main address list in Outlook, a duplicate of it appears in the All contacts list in Outlook.

 **Note:** Contact sync doesn't support Outlook categories, so contacts labeled with a Salesforce\_Sync category that don't exist in a contacts subfolder of the same name don't sync with Salesforce. To avoid this issue, disable contact categories and select the Salesforce\_Sync folder for new contacts in Outlook. See [EAC - New Contacts Created In Outlook with 'Salesforce\\_Sync' Category Do Not Sync to Salesforce](#).

### Google

After you're set up to sync contacts, Einstein Activity Capture creates a group called Salesforce Sync in your connected Google account. Your contacts sync between the Salesforce Sync group and Salesforce. Don't rename, move, or delete the Salesforce Sync group. If you delete the group, contacts stop syncing between your connected account and Salesforce.

If you're set up to sync from Salesforce to Google only, no more setup is required. Your contacts are syncing from Salesforce to your Salesforce Sync group.

If you're set up to sync from Google to Salesforce or both ways, move the Google Contacts that you want to sync into the Salesforce Sync group. To sync, all Google Contacts must have an Email field with a Work label and a Phone field with one of the following standard labels: Home, Work, Other, Mobile, or Work Fax. Einstein Activity Capture starts syncing contacts in the Salesforce Sync group that meet your sync criteria to Salesforce during the next sync cycle.

### SEE ALSO:

[Contacts and Einstein Activity Capture](#)

### EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

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Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

## Exclude Emails and Events from Being Added to Salesforce

## EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

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Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

When you add email addresses to your Excluded Addresses list, emails and events with those people aren't added to the activity timeline of related Salesforce records. Events aren't added to the Salesforce calendar. And events aren't synced between Salesforce and the connected accounts.

 **Note:** Your Salesforce admin could have added people to the org-wide Excluded Addresses list.

1. From personal settings, enter **Excluded Addresses** in the Quick Find box, and then click **Excluded Addresses** under Einstein Activity Capture.
2. Update the Excluded Addresses list.

SEE ALSO:

[Considerations for Excluding Data from Einstein Activity Capture](#)

[End-User Setup for Einstein Activity Capture](#)

#### USER PERMISSIONS

To add people to the excluded addresses list:

- Use Einstein Activity Capture

## Control How Activities Added by Einstein Activity Capture Are Shared

### USER PERMISSIONS

To view and change your sharing settings:

- Use Einstein Activity Capture

Choose how to share activities that Einstein Activity Capture adds to the activity timeline of related Salesforce records. You can share with all users, Chatter groups, or no one.

 **Note:** Some Sales Cloud Einstein features generate business-related insights using emails captured by Einstein Activity Capture, including emails that aren't shared. However, the content of the emails and the usernames associated with them are hidden. Einstein Opportunity Insights and Einstein Automated Contacts are the Sales Cloud Einstein features that use these private emails.

1. From your personal settings, enter *Sharing Settings* in the Quick Find box, and then select **Sharing Settings** under Einstein Activity Capture.

2. Click **Change**.

If your admin chose to enforce the Don't Share setting, you can't change the sharing setting. However, you can still share individual emails and events, and respond to sharing requests from other users.

3. Select how you want to share your emails and events.

When activities are shared with everyone, others see full email and event details. When activities aren't shared with everyone, others see basic details, such as dates and names, and can request full access from the activity owner. "Everyone" means all Salesforce users at your company, unless your admin changed it to mean only Einstein Activity Capture users. To share with Chatter groups, the group owner has to add the **Enable email and event sharing** option to the group. If you share with Chatter groups, you can choose up to 20 private or unlisted Chatter groups.

## EDITIONS

Available in: Lightning Experience

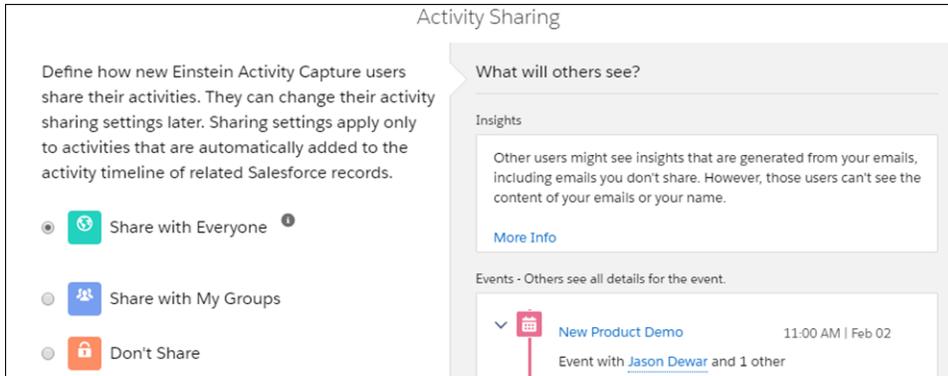
Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter, Professional, Enterprise, Performance,** and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

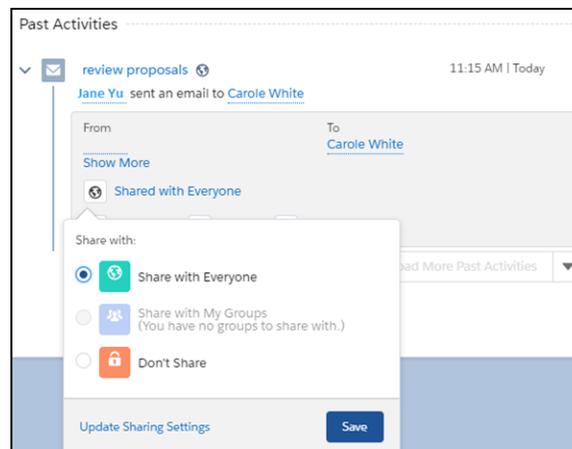
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Your sharing setting, which overrides the default sharing set by your Salesforce admin, is applied to all your emails and events, except the ones that you individually set sharing for. To set sharing setting for an individual email or event, find the email or event on the activity timeline and select a new sharing setting. To share individual emails and events, you need access to Chatter.



**Important:** 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. The email is shared with all five groups.

SEE ALSO:

[Set Up a Group for Sharing Activities](#)

[End-User Setup for 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 all group members.

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](#).

The screenshot shows the 'Edit Sales Reps' dialog box. The 'Enable email and event sharing' checkbox is checked and highlighted with a red box. Other options include 'Owner' (Sally Cho), 'Disable automatic archiving', 'Access Type' (Private), 'Allow customers', and 'Broadcast Only'. The 'Save' button is visible at the bottom right.

4. Save the group.

Group members who use Einstein Activity Capture can share their emails and events with all group members. 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](#)

## Troubleshoot Einstein Activity Capture Setup Issues

If you run into problems with Einstein Activity Capture, review our troubleshooting suggestions.

Available in: Lightning Experience

Available with Sales Cloud in: **Essentials, Professional, Enterprise, Performance, and Unlimited** Editions

### EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter, Professional, Enterprise, Performance, and Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

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Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

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

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Available with Inbox, which is available in **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

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Available with Sales Engagement, which is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions

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### [Enable or Disable Einstein Activity Capture](#)

After you complete the Einstein Activity Capture setup flow, the feature is turned on. However, you can enable and disable the feature as needed.

### [Reset Einstein Activity Capture](#)

Reset the feature if you need to change the email and calendar service that you use with Einstein Activity Capture or the authentication method used in the connection.

### [Check Connection Status and Metrics for Einstein Activity Capture Users](#)

If Einstein Activity Capture users have issues with their connections or data, you can troubleshoot their connection status and reconnect and resync data. Einstein Activity Capture Status & Metrics provides an overall picture of how your users are onboarding. See reports about event sync times and failures to help identify recurring issues and keep your users' connections optimized.

### [Get Notified When Users' Connections Are in Trouble](#)

As a Salesforce admin, you can receive notifications in the app and by email when your users' Einstein Activity Capture connections have a status of Disabled or Needs Attention. Notifications can help you reduce your support queue and increase user satisfaction by helping you resolve issues early.

### [Test a User's Einstein Activity Capture Sync Status](#)

If you connect to Einstein Activity Capture using an org-level connection or service account, you can test whether a user's contacts and events are syncing properly. If a problem occurs, you can reset the user. We also show you that the user accepted the Einstein Activity Capture terms of service and you can send a reminder.

### [Test Whether Users Are Visible by Your Service Account](#)

If you connect to Einstein Activity Capture using a service account, you can check whether the service account has access to a specific user's data.

### [Manage Activities Owned by Inactive Einstein Activity Capture Users](#)

Einstein Activity Capture automatically adds email and events to the activity timeline of related Salesforce records. When an Einstein Activity user becomes an inactive Salesforce user, you can make sure their activities, including private ones, are available to others.

## SEE ALSO:

[Admin Setup for Einstein Activity Capture](#)

## Enable or Disable Einstein Activity Capture

## EDITIONS

Available in: Lightning Experience

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Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

After you complete the Einstein Activity Capture setup flow, the feature is turned on. However, you can enable and disable the feature as needed.

 **Note:** When Einstein Activity Capture is on, you can't use the Related Lists activities view.

1. From Setup, enter *Einstein Activity Capture* in the Quick Find box, and then select **Settings**.
2. Click the **Settings** tab.
3. Turn on or turn off Einstein Activity Capture.

 **Warning:** If you turn off Einstein Activity Capture, all email and events that were captured from users' connected accounts are hidden from the activity timeline and the Salesforce calendar. The Activities dashboard isn't available. Previously captured data and new data is still stored using a public cloud provider. Contacts and events stop syncing for all users. Your settings and configurations remain.

#### SEE ALSO:

[Set the Default Activities View](#)

[Admin Setup for Einstein Activity Capture](#)

#### USER PERMISSIONS

To enable or disable Einstein Activity Capture:

- Customize Application OR Modify All Data

To view the Einstein Activity Capture setup pages:

- View Setup and Configurations

## Reset Einstein Activity Capture

## EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

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Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

Reset the feature if you need to change the email and calendar service that you use with Einstein Activity Capture or the authentication method used in the connection.

1. From Setup, enter *Einstein Activity Capture* in the Quick Find box, and then select **Settings**.
2. From the dropdown next to the connection method, select **Reset Einstein Activity Capture**.

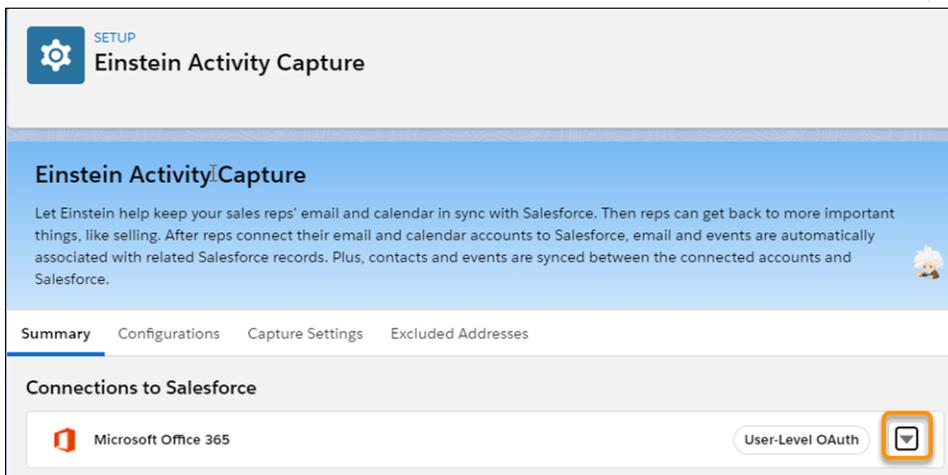
## USER PERMISSIONS

To reset Einstein Activity Capture:

- Customize Application OR Modify All Data

To view the Einstein Activity Capture setup pages:

- View Setup and Configurations



When you reset Einstein Activity Capture, your selected email and calendar service is removed. Your configurations and settings are deleted. Contacts and events stop syncing for all users. User-level connections remain and continue to be used for capturing emails, events, and contacts.

SEE ALSO:

[Admin Setup for Einstein Activity Capture](#)

## Check Connection Status and Metrics for Einstein Activity Capture Users

## EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

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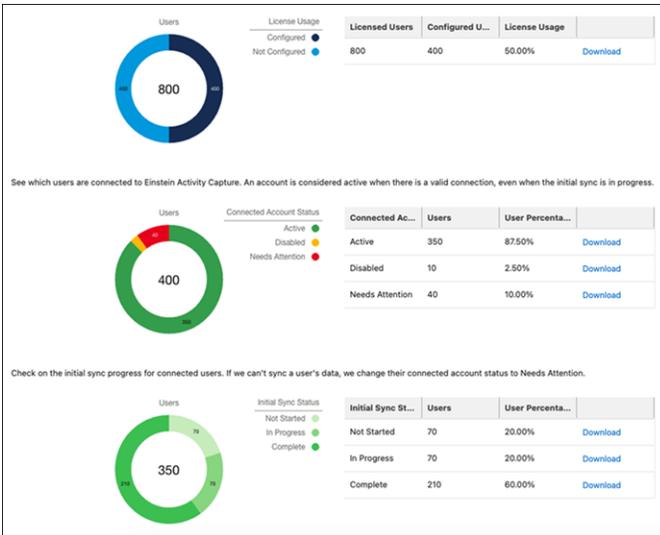
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Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

If Einstein Activity Capture users have issues with their connections or data, you can troubleshoot their connection status and reconnect and resync data. Einstein Activity Capture Status & Metrics provides an overall picture of how your users are onboarding. See reports about event sync times and failures to help identify recurring issues and keep your users' connections optimized.

1. From Setup, enter *Einstein Activity Capture* in the Quick Find box, and then select **Status & Metrics**.
2. Under Connection Status, review the status of your Einstein Activity Capture users, recommended actions, and the last data capture date and time. Scroll to see the last updated date and time.



These metrics are for License Usage.

### Licensed Users

Users assigned the Standard Einstein Activity Capture permission or Einstein Activity Capture permission.

### Configured Users

Users who are part of an active Einstein Activity Capture configuration.

### License Usage

Percentage of licensed users that are configured.

These metrics are for Connected Account Status. A user's connected account status updates when they log in to Salesforce.

### Active

Users who have connected their email and are ready to capture data, or are capturing data already. This total is the sum of users with an initial sync status of Not Started, In Progress, and Complete.

### Disabled

Users who disconnected their email or had their account disabled by an admin. Get notified when users' accounts change to this status by setting email and in-app notifications in Einstein Activity Capture Settings in Setup. Notifications are sent every 7 days.

### Needs Attention

Users whose accounts must be reconnected. For example, a user's password has expired. Get notified when users' accounts change to this status by setting email and in-app notifications in Einstein Activity Capture Settings in Setup. Notifications are sent every 7 days.

## USER PERMISSIONS

To check a user's connection status:

- Customize Application OR Modify All Data

To view the Einstein Activity Capture setup pages:

- View Setup and Configurations

**User Percentage**

Percentage of licensed users with the connected account status.

These metrics are for Initial Sync Status. Users in this area have connected their email already.

**Not Started**

Users who have never synced data.

**In Progress**

Users who have an initial sync in progress for events and contacts.

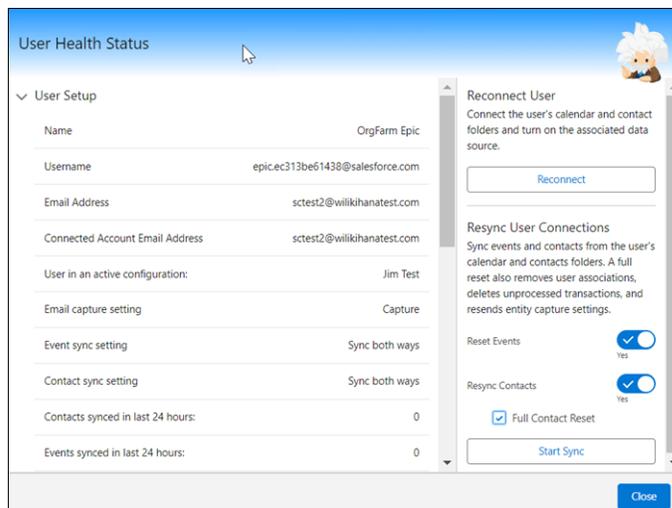
**Complete**

Users who have successfully synced data at least one time.

**User Percentage**

Percentage of licensed users with the initial sync status.

3. Under User Status, the default view shows all Einstein Activity Capture users who are in an active configuration. To refine your results, search for a user or filter by status. The Synced Today metrics are updated after 12:00 AM local time.
  - a. If a user's Connected Account Status is Needs Attention, you see details about the issue and ways to fix it. To reconnect the user or resync data, select **Check User Health Status** from the dropdown list. User Health Status also contains configuration details to help you troubleshoot.



**!** **Important:** Resync of events and email is available only for org-level authentication connections.

- b. If you use an org-level OAuth 2.0 or a service account authentication method, you also see whether users accepted the terms of service that are required to capture emails. If the Terms of Service Status is Pending, select **Check User Sync Status** from the dropdown list to send the user a reminder. You can also check the user's sync status, which is updated each time the user logs in to Salesforce.
4. Under Reports, see metrics for the past 7 days of events. Metrics are current as of the date and time the Reports page is loaded. The Sync Time Report shows how many events were synced between Salesforce and your third-party integration. The Failure Report shows the top 5 recurring errors over the last 7 days.

Connection Status User Status **Reports**

**Sync Time Report**  
 See how EAC is performing for your org. These metrics describe transactions between Salesforce and Google G Suite in both directions. The last sync for this org ran at Oct 16, 2023, 3:29 PM. There were 5 transaction records, out of which 4 were successful and 1 failed.

Salesforce to Google G Suite Sync Times over the Past 7 Days					Google G Suite to Salesforce Sync Times over the Past 7 Days				
Date	0-15 Minutes	15-30 Minutes	30-60 Minutes	> 60 Minutes	Date	0-15 Minutes	15-30 Minutes	30-60 Minutes	> 60 Minutes
10/16/2023	300	100	75	25	10/16/2023	55	3	22	5
10/17/2023	200	50	25	0	10/17/2023	98	455	2	55
10/16/2023	500	20	76	22	10/16/2023	876	66	32	1
10/15/2023	900	44	33	1	10/15/2023	532	77	5	15
10/14/2023	765	433	234	12	10/14/2023	987	32	12	7
10/13/2023	651	78	2	0	10/13/2023	543	89	256	5
10/12/2023	768	32	100	4	10/12/2023	568	89	33	77

SEE ALSO:

[Get Notified When Users' Connections Are in Trouble](#)

## Get Notified When Users' Connections Are in Trouble

## EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

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Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

As a Salesforce admin, you can receive notifications in the app and by email when your users' Einstein Activity Capture connections have a status of Disabled or Needs Attention. Notifications can help you reduce your support queue and increase user satisfaction by helping you resolve issues early.

Notifications are sent every 7 days.

1. From Setup, in the Quick Find box, enter *Einstein Activity Capture*, and then select **Settings**.
2. Click the **Settings** tab.
3. Turn on Connection Status Notifications.
4. In Percent of Connected Accounts, enter a percentage of connected accounts that have the status of Disabled or Needs Attention. When this threshold is reached, you receive a notification every 7 days.  
If you enter 0%, you don't receive any notifications.
5. Click **Save**.
6. From the Notification Type list, select the delivery format of the notification that you want to receive.

## USER PERMISSIONS

To check a user's connection status:

- Customize Application  
OR  
Modify All Data

To view the Einstein Activity Capture setup pages:

- View Setup and Configurations

## Test a User's Einstein Activity Capture Sync Status

## EDITIONS

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If you connect to Einstein Activity Capture using an org-level connection or service account, you can test whether a user's contacts and events are syncing properly. If a problem occurs, you can reset the user. We also show you that the user accepted the Einstein Activity Capture terms of service and you can send a reminder.

1. From Setup, in the Quick Find box, enter *Einstein Activity Capture*, and then select **Settings**.

2. In the Quick Links section, click **Check User Sync Status**.

3. Enter the name of an Einstein Activity Capture user. If the user's acceptance of the terms of services is pending, you can send a reminder.

4. To see whether a user's contacts and events are syncing properly, click **Check Status**.

Einstein Activity Capture checks the connection between Salesforce and your email server and summarizes the results.

5. If errors are listed, click **Reset User**.

Resetting the user removes and then restores the connections between the user's email and calendar application and Salesforce. After the connection is restored, contacts and events are synced again. The reset process can take several hours.

6. If syncing doesn't resume, check that the email address on the User record has the same domain as the Microsoft or Google credentials used when setting up the Einstein Activity Capture connection.

#### SEE ALSO:

[Connect to Einstein Activity Capture with Org-Level OAuth 2.0](#)

[Connect to Einstein Activity Capture with a Microsoft Exchange Service Account](#)

[Connect to Einstein Activity Capture with a Google Service Account](#)

#### USER PERMISSIONS

To check a user's sync status:

- Customize Application
- OR
- Modify All Data

To view the Einstein Activity Capture setup pages:

- View Setup and Configurations

## Test Whether Users Are Visible by Your Service Account

## EDITIONS

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If you connect to Einstein Activity Capture using a service account, you can check whether the service account has access to a specific user's data.

1. From Setup, in the Quick Find box, enter *Einstein Activity Capture*, and then select **Settings**.
2. In the Quick Links section, click **Check User Connection**.
3. Enter the name of any Salesforce user, and then click **Check Connection**.  
If the connection fails, work with your Exchange or Google admin to make sure that the user is set up properly.

SEE ALSO:

[Connect to Einstein Activity Capture with a Microsoft Exchange Service Account](#)

[Connect to Einstein Activity Capture with a Google Service Account](#)

## USER PERMISSIONS

To check a user's connection status:

- Customize Application
- OR
- Modify All Data

To view the Einstein Activity Capture setup pages:

- View Setup and Configurations

## Manage Activities Owned by Inactive Einstein Activity Capture Users

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Einstein Activity Capture automatically adds email and events to the activity timeline of related Salesforce records. When an Einstein Activity user becomes an inactive Salesforce user, you can make sure their activities, including private ones, are available to others.

1. To determine who needs access to the inactive user's activities, check with the inactive user's manager.
2. If the manager wants only some users to have access to the activities:
  - a. Create a private Chatter group and [enable email and event sharing](#). Add everyone to the group who needs access to the inactive user's email and events.  
 **Tip:** If the option to enable email and event sharing isn't available, [add it to the group layout](#).
  - b. Log in as the inactive user and go to their Einstein Activity Capture sharing settings. Change the sharing settings so that email and events are shared with the Chatter group you created.
  - c. Go to individual activities in the activity timeline. Manually change email and events so that they're shared with the Chatter group you created.
3. If the manager wants all users to have access to the activities:
  - a. Log in as the inactive user and go to their Einstein Activity Capture sharing settings. Change the sharing settings so that email and events are shared with everyone.
  - b. Go to individual activities in the activity timeline. Manually change email and events so that they're shared with everyone.

#### USER PERMISSIONS

To log in as another user:

- [Modify All Data](#)

To edit group layouts

- [Customize Application](#)

#### SEE ALSO:

[Log In as Another User](#)

[Control How Activities Added by Einstein Activity Capture Are Shared](#)

## Emails and Einstein Activity Capture

Learn about what happens when emails are enabled in an Einstein Activity Capture configuration.

[Guidelines for Using Emails with Einstein Activity Capture](#)

Make sure you understand how Einstein Activity Capture works with emails.

### SEE ALSO:

[End-User Setup for Einstein Activity Capture](#)

[Einstein Activity Capture](#)

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## Guidelines for Using Emails with Einstein Activity Capture

Make sure you understand how Einstein Activity Capture works with emails.

### General

- When emails move from the connected account to Salesforce, they don't become Salesforce records. Therefore, emails aren't available in standard reports and don't appear on the My Unresolved Items page. For more details, see [What Does Einstein Activity Capture Do?](#)
- Depending on how your Salesforce admin set up Einstein Activity Capture, you could be prompted to connect your email and calendar to Salesforce. Until you do so, you can't send emails in Lightning Experience.
- After you connect your email and calendar account to Salesforce, it takes up to 24 hours for your emails to be added to related Salesforce records. New emails are added to Salesforce records in near real-time, but sometimes it takes longer.
- By default, emails sent 180 days before a user's account is connected to Salesforce are added to the activity timeline of related records. To change this timeframe, admins can adjust the Filter by Sent Date value when creating a configuration or later on the configuration's Advanced Settings tab. When editing the value on an existing configuration, the new value doesn't apply to users in the configuration who already have an account connected.



**Tip:** If you used to manually log emails to Salesforce, you can avoid seeing duplicate emails on the activity timeline by having your admin change the value to 0 days.

- If you have the same value for an org-wide email address and a connected account, the org-wide email address is used to send the email.
- When sending emails from Salesforce, Einstein Activity Capture users can include up to 50 attachments. The attachments can't include executable files, such as .pkg and .js files, as attachments.
- When sending emails from the connected email account, file attachments aren't added to Salesforce records and can't be viewed in Salesforce.
- When using Einstein Activity Capture, automatic bcc isn't supported.
- Custom objects aren't supported. When emails are sent from a custom object, the email is added to the activity timeline of the associated contact.
- The Assistant doesn't always work as expected. For example, alerts in the Assistant don't reflect emails added to Salesforce with Einstein Activity Capture. Also, emails that you send from the Assistant don't go through your connected email account.

### Activity Timeline

- Emails that Einstein Activity Capture users send and receive are automatically added to the activity timeline of the following related records: business accounts, person accounts, contacts, contracts, leads, opportunities, and quotes. Emails aren't shown in the Related Lists activities view.
- Emails sent from Salesforce are added to the activity timeline of related records. If your Einstein Activity Capture configuration has emails enabled, it can take longer for emails sent from Salesforce to appear on the activity timeline. While Einstein Activity Capture adds emails sent from Salesforce to the activity timeline, users don't see details in the email on the activity timeline.

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- The data used to relate an email to a record varies based on the record. For an email to be associated with a record, the email must occur within a specific date range.

Record	Data	Date Range	Notes
Business account	Directly related contacts  A direct relationship is between a contact and its primary account. The primary account is listed in the Account Name field of the contact record. Emails and events from the first 50 directly related contacts are added to the account's activity timeline.	None	None
Person account	Email address from standard Email field	None	None
Contact	Email address from standard Email field	None	If multiple contacts have the same email address, Salesforce adds related events to both records.
Contract	Contract contact role	<ul style="list-style-type: none"> <li>Activities begin 30 days before the contract's created date.</li> <li>Activities end 30 days after the activation date (for active contracts) or 30 days after the current date (for inactive contracts).</li> </ul>	From the Einstein Activity Capture settings, click <b>Edit Records</b> next to the Records That Activities Are Added To setting. Then add contracts.
Lead	Email address from standard Email field	All activities that occur up until the date the lead is converted are added to the lead record. After the lead is converted, all activities are transferred to the contact record.	If multiple leads have the same email address, Salesforce adds related events to both records.
Opportunity	Opportunity contact role	<ul style="list-style-type: none"> <li>Activities begin 60 days before the opportunity's created or closed date, whichever is earlier.</li> <li>Activities end 60 days after the current date (for open opportunities) or 60 days after being closed (for closed opportunities).</li> </ul>	None

Record	Data	Date Range	Notes
		 <b>Note:</b> If Activity 360 Reporting is enabled, these date ranges don't apply. Only emails after Activity 360 Reporting was enabled are associated with opportunities.	
Quote	Email address from the standard Email field in the Prepared For section	<ul style="list-style-type: none"> <li>– Activities begin no earlier than the quote's created date.</li> <li>– Activities end no later than the quote's expiration date.</li> </ul>	From the Einstein Activity Capture settings, click <b>Edit Records</b> next to the Records That Activities Are Added To setting. Then add quotes.

- Related emails are grouped, also known as threaded, in the activity timeline. Users without Einstein Activity Capture continue to see emails individually.
- The filter options differ from what users without Einstein Activity Capture see. For example, Einstein Activity Capture users have a filter option to show only emails that have insights.
- The All Activity History tab doesn't include emails added to Salesforce with Einstein Activity Capture.
- If two or more contacts or leads have the same email address, Salesforce adds related emails to both records.
- Einstein Activity Capture can associate an email to up to 50 contact records. If the combined number of email addresses in the To and CC fields exceeds this limit, only the first 50 unique addresses are processed.
- If you change the email address in the standard Email field, all data that was previously captured with that email address is removed from Salesforce. The data is still stored until the data retention period expires. Because we continue to store the data, if you change back to the original email address, the data is visible in Salesforce again.
- For emails you send or receive, you can remove some or all the associations between an email and related records, or add new associations. For example, Einstein Activity Capture adds your sent email to the activity timeline of an opportunity record. But you determine that the opportunity doesn't have much to do with that email, so you remove the association to it. Then you search for and add an association to a more relevant opportunity.

## 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 who 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 who 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:

[End-User Setup for Einstein Activity Capture](#)

[Einstein Activity Capture](#)

## Events and Einstein Activity Capture

Learn about what happens when events are enabled in an Einstein Activity Capture configuration.

### [Guidelines for Using Events with Einstein Activity Capture](#)

Make sure you understand how Einstein Activity Capture works with events.

### [How Events Sync with Einstein Activity Capture](#)

Learn how Einstein Activity Capture matches your Microsoft or Google events with relevant Salesforce events, leads, and contacts. Also, learn what we do when we can't resolve a match, which events we sync, and how often.

### [How Event Attendees Sync with Einstein Activity Capture](#)

Contacts, leads, and Salesforce users sync to Microsoft or Google calendars. Events sync according to the organizer's sync direction.

### [How Event Series Sync with Einstein Activity Capture](#)

If you use Microsoft with Einstein Activity Capture, you can sync event series. There are some considerations to be aware of.

### [How Events Are Automatically Related to Contacts or Leads](#)

Einstein Activity Capture can automatically relate synced Microsoft or Google events to relevant contacts or leads in Salesforce. Learn how that feature works, and how it interacts with other Salesforce options.

### [How Private Events Sync with Einstein Activity Capture](#)

When a Salesforce admin selects the Sync private events setting in Einstein Activity Capture configurations, events that reps mark as private can sync between Salesforce and your Microsoft or Google calendar. When a private event syncs, it's marked as private in both calendar applications. However, some situations aren't supported for private events, such as attendee sync and automatically relating contacts or leads.

### [How to Respond to Event Invitations from Your Microsoft or Google Calendar](#)

To avoid overwriting your attendance status when syncing with Einstein Activity Capture, consider your sync direction before you accept and decline event invitations.

### [Field Mappings for Event Sync](#)

When you use Einstein Activity Capture to sync events, fields from your Salesforce events are mapped to fields in the connected Microsoft or Google account. Learn which fields sync and how they're mapped. Plus, see which Microsoft® Exchange field mappings Salesforce admins can customize.

#### SEE ALSO:

[End-User Setup for Einstein Activity Capture](#)

[Einstein Activity Capture](#)

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## Guidelines for Using Events with Einstein Activity Capture

Make sure you understand how Einstein Activity Capture works with events.

### General

- When events move from the connected account to Salesforce, they become Salesforce records and appear on the My Events calendar in Salesforce. The events are available in standard reporting and Salesforce Platform capabilities. See [What Does Einstein Activity Capture Do?](#).
- For the most control over which event data moves to Salesforce, [create a configuration](#) with events enabled.
- Before you turn on a configuration with events enabled, ask your users to [prepare events that they don't want to sync](#).
- Event attachments don't sync between Microsoft Exchange or Google and Salesforce.
- Formatted text in an event's description, such as text color and paragraph style, doesn't sync between Microsoft Exchange or Google and Salesforce. If users are set up to sync both ways, plain text replaces formatted text in the event description when an event syncs back to the connected account.
- Events created using Bookings with Me in Outlook don't sync between Microsoft and Salesforce.
- Your [Salesforce sharing settings](#) control which users have access to event records.
- By default, events are synced starting from the date the user's account is connected to Salesforce. To change this date, you can adjust filter by end date when creating a configuration. You can also adjust the date later on your configuration's Advanced Settings tab. The adjusted date doesn't apply to users in the configuration with a connected account.
- If a Google or Microsoft event started two or more days ago, changes to the event aren't synced to Salesforce.
- All-day events sync from Microsoft to Salesforce as 24-hour events.

### Event Organizers and Attendees

- Einstein Activity Capture syncs up to 50 attendees per event.
- If an event organizer creates an event in Salesforce, they can only invite attendees who are Salesforce users, contacts, or leads. Event organizer's must invite other attendees from their external calendar.
- If an event organizer is set up to sync events from an external calendar to Salesforce or both ways, attendees are removed from events when a user changes or removes the attendee's connected email address.
- If a user removes an attendee from an event, the attendee remains invited if the organizer replaces the email address on the external calendar event with an address that doesn't match the original Salesforce user, contact, or lead. The attendee also remains invited if a user adds an email address that matches a record with the attendee's email address in a custom email field to the external calendar event.
- If an event organizer isn't set up to sync events or is set up to sync after attendees, attendees who are set up to sync events experience unexpected sync behavior. See [How Event Attendees Sync with Einstein Activity Capture](#).

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## Activity Timeline

- Events that include Einstein Activity Capture users are added to the activity timeline of related account, contact, and lead records. Users see events as records when you select the [Relate synced events to Salesforce records](#) option in your configurations' advanced settings.
- If you use Google Workspace, event series don't appear on the activity timeline.
- The Only Show Events That Are Salesforce Records setting in the Einstein Activity Capture settings controls which events appear on the activity timeline of related records.

If you started using Einstein Activity Capture before Spring '23 and have the setting turned off, you can see the Only Show Events That Are Salesforce Records setting. We recommend that you create a configuration with events enabled and turn on the setting. That way, all events on the activity timeline are available in standard reports and powerful Salesforce Platform capabilities, such as Activities dashboard.

When the Only Show Events That Are Salesforce Records setting is off:

- Events that include Einstein Activity Capture users are added to the activity timeline of related account, contact, lead, opportunity, contract, and quote records. But the events on the activity timeline aren't Salesforce records unless you select the [Relate synced events to Salesforce records](#) option from a configuration's advanced sync settings. Only events that are Salesforce records are available in standard reports and other Salesforce Platform capabilities.
- All-day events on the event detail page are shown as occurring from midnight to midnight in GMT.

### SEE ALSO:

[End-User Setup for Einstein Activity Capture](#)

[Einstein Activity Capture](#)

## How Events Sync with Einstein Activity Capture

Learn how Einstein Activity Capture matches your Microsoft or Google events with relevant Salesforce events, leads, and contacts. Also, learn what we do when we can't resolve a match, which events we sync, and how often.

### Which Events Sync and How Are They Matched?

Einstein Activity Capture checks to see whether an event with the same subject, date, and start and end times exists in both Salesforce and Microsoft or Google. If events match, they're mapped to each other and begin to sync between applications. If no events match, a new event is created, and the two are mapped to sync between your external calendar.

Because recent events are the most relevant to you, after your Salesforce admin initiates sync, Einstein Activity Capture attempts to match only:

- New Salesforce events after you create them or existing Salesforce events after you update them.
- New and existing Microsoft or Google events that fall within the filter and sync settings set by your admin.

Event sync can take a day or more. Some factors can impact sync wait time, such as:

- When many users are set up to start syncing around the same time
- When sync is pending for a significant number of events

Einstein Activity Capture syncs up to 50,000 events per user. If you have more than 50,000 events that meet the event sync filters set by your admin, an additional nonsyncing event is picked up for sync only when one of the 50,000 stops syncing.

An event stops syncing if a user deletes the event, if the event has occurred and no longer meets past event sync filters, or if an event sync issue occurs.

When meeting organizers are part of user-level event sync configurations, organizer-created events sync only after organizers connect their mail account and complete onboarding. Until that occurs, the organizers' events don't sync, and also don't sync for user attendees they invite. See "How Do Events Sync When the Organizer Isn't in a Syncing Configuration?" in [How Event Attendees Sync with Einstein Activity Capture](#).

### Sync Conflicts

If a change you made in Salesforce didn't sync to your external calendar, you could have experienced a sync conflict. Sync conflicts occur when at least one of these conditions is true.

- You're set up to sync events both ways.
- You, another user with access, or an automated action updates the event in both your external application and Salesforce before Einstein Activity Capture syncs the change.

If a sync conflict occurs, Einstein Activity Capture gives preference to the change made in your external calendar. If automatic, mass event updates are made from your external calendar or Salesforce, you experience sync conflicts more often. Companies usually make mass event updates when admins or developers set up automation or create custom API calls.

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## Unresolved Events

After syncing, events that can't be related to a lead or contact are added to the Unresolved Items list in your personal settings in Salesforce. From there, you can choose which Salesforce leads or contacts to relate to the synced event. Or you can remove the event from the list and opt not to relate a record.

When the Relate Synced Events to Salesforce Records setting is enabled, synced events aren't added to the Unresolved Items list. See [How Events Are Automatically Related to Contacts or Leads](#).

## Custom Fields

Einstein Activity Capture doesn't sync custom fields between applications. However, Einstein Activity Capture considers custom fields with the email field type when matching records between applications in these cases.

- When matching user accounts, contacts, or leads as attendees on Salesforce events
- When relating contacts or leads to Salesforce events
- When field-level platform encryption is enabled for the standard email address field on contacts, so that Einstein Activity Capture can match contacts or leads to events

## Deleting Synced Events

When the Remove Deleted Events setting is enabled, deleted events sync between your Salesforce calendar and external calendar.

If a user deletes a syncing Microsoft event from another user's Microsoft calendar, the counterpart isn't deleted in Salesforce.

## Changing Event Owner

If an event owner is changed, the event is removed from the previous owner's Salesforce calendar, but not from their Google or Microsoft calendar.

SEE ALSO:

[Events and Einstein Activity Capture](#)

## How Event Attendees Sync with Einstein Activity Capture

Contacts, leads, and Salesforce users sync to Microsoft or Google calendars. Events sync according to the organizer's sync direction.

### When Do Attendees Sync?

Event attendee details sync when:

- The event organizer is a Salesforce user who is set up to sync events with Einstein Activity Capture.
- The event attendee is a Salesforce user, contact, or lead.

For example, when event organizers create events in Salesforce, they can invite attendees who are Salesforce users, contacts, or leads. The attendee field syncs. Attendees who don't match to a Salesforce record are external attendees and must be invited to events from organizers' external Microsoft or Google calendars. In these cases, the attendee field doesn't sync to Salesforce, because nothing in Salesforce is a match.

Einstein Activity Capture syncs up to 50 attendees per event.

**!** **Important:** Chatter Free users can't be attendees on events. The Chatter Free license is for users who don't have Salesforce licenses but must have access to Chatter. These users can access standard Chatter items such as people, profiles, groups, and files, but they can't, for security reasons, access any Salesforce objects or data.

### How Do Events Sync for Organizers and Attendees?

In Salesforce, event organizers and attendees experience the same events differently.

- Events sync according to the event organizer's sync direction. Therefore, it's best for admins to set up event sync for whole teams, not individuals. Otherwise, when an event organizer who isn't set up to sync events invites an attendee who is set up to sync events, the attendee experiences unexpected sync behavior. For example, a meeting organizer creates an event in Exchange or Google but isn't configured to sync events inbound. The organizer invites a user as an attendee of their event. The attendee gets a standalone version of the event on the calendar.
- An event organizer can see and edit any event field. Any change an organizer makes to the event is visible to attendees.
- If an event organizer deletes the event from an attendee's Microsoft calendar, the counterpart isn't deleted in the attendee's Salesforce calendar.
- An attendee can see event details, edit the event reminder, and mark the event as private.
- If an attendee deletes the event from their Salesforce calendar, the event is removed only from the attendee's Salesforce calendar. The attendee's name is saved on the event's Created By and Last Updated By fields.

### How Do Events Sync When the Organizer Isn't in a Syncing Configuration?

If an event organizer isn't set up to sync events and attendees are set up to sync events, the attendees experience unexpected sync behavior.

- When the event organizer creates an event in Salesforce, syncing attendees see a standalone version of the event on their Salesforce calendar. The event doesn't sync from Salesforce to the attendees' external calendars.

#### EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

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- When the event organizer creates an event in their external calendar, the event syncs from the external calendar to attendees' Salesforce calendars. In Salesforce, each attendee is the organizer of the event and other attendees aren't displayed. Attendees can edit event fields, but those edits don't sync to their external calendar. If the organizer updates the event from the external calendar, the organizer's edits override the attendee's and sync to Salesforce. That way, the attendee sees the latest meeting details.

### What Happens When the Event Organizer Is Added to a Configuration with Event Syncing?

- When an event organizer is set up to sync, a new syncing event is created. The event organizer sees the new syncing event. To prevent duplicates, attendees with a standalone version of the event don't see the syncing event. If an organizer adds new attendees to the new syncing event, attendees with a standalone event see duplicates. All meeting participants are visible on the external calendar event.
- Attendees sometimes see duplicates in Salesforce after admins reset sync for event organizers and attendees.

### How Are Invitations Sent to Attendees?

For events created in Lightning Experience or Salesforce mobile app, event invitations and cancellations are emailed to attendees from your email application. For events created in Salesforce Classic, Salesforce sends invitations and cancellations.

Attendee responses to event invitations don't sync from Salesforce to your external calendar. Attendees can't respond to event invitations in Lightning Experience and the Salesforce mobile app. To avoid overwriting attendance statuses in Salesforce Classic, see [How to Respond to Event Invitations from Your Microsoft or Google Calendar](#).

### When Are Attendees Removed from a Syncing Event?

Attendees can be unintentionally removed from syncing events in these scenarios.

- The organizer is set up for one of these sync directions: Both Ways, Exchange to Salesforce, or Google to Salesforce and a user changes or removes the matching email address from the Salesforce user account, contact, or lead.
- A Salesforce user was configured with a non-primary (alias) email address.

However, original attendees can stay invited to syncing events despite having been intentionally removed when both of these conditions are true.

- The organizer replaces the email address on the Microsoft or Google event with an address that doesn't match the original Salesforce user, contact, or lead.
- A user adds an email address on the Microsoft or Google event, and the email address matches a record that has an original attendee's email address in a custom email field.

SEE ALSO:

[Events and Einstein Activity Capture](#)

## How Event Series Sync with Einstein Activity Capture

If you use Microsoft with Einstein Activity Capture, you can sync event series. There are some considerations to be aware of.

- Einstein Activity Capture supports sync for event series for Microsoft Exchange Online with Office 365 and Microsoft Exchange on-premises servers. Sync for event series isn't supported for Microsoft Exchange hybrid deployments.
- Einstein Activity Capture supports sync for event series from Google to Salesforce. Event sync from Salesforce to Google isn't supported.
- Sync for recurring events (repeating events created in Salesforce Classic) isn't supported.
- If you have a pre-existing event series when you turn on Einstein Activity Capture event syncing, the past events in the series aren't reflected on the Activities dashboard.
- When you update an events series, such as changing the subject, Salesforce doesn't update the past events in the series, but Microsoft does. Later, when events sync between Salesforce and Microsoft, the events are considered different and appear on the activity timeline as duplicates.
- When you update an individual event in an event series, such as changing the subject or attendee list, the change isn't always reflected in the events that appear in the activity timeline.
- When you edit a series in your Microsoft calendar, only updates to future events sync to Salesforce. When you delete a series in your Microsoft calendar, only future events are removed from Salesforce.
- When you delete individual events from an event series, the delete syncs between Salesforce and your Microsoft calendar based on your sync direction. The individual events are removed from the Microsoft series regardless of whether your admin has selected the Delete synced events option in your sync configuration.
- If you convert an event series to a standalone event in your Microsoft calendar, Einstein Activity Capture doesn't remove the series from the Salesforce calendar. We recommend that you delete the series from your Microsoft calendar and re-create it as a standalone event.
- When you convert a standalone event to a series from Microsoft calendar, Einstein Activity Capture deletes the matching standalone event in Salesforce and creates a series. The new series doesn't retain relationships from the original event to other Salesforce records that you added manually. If you're set up to relate contacts or leads to events, Einstein Activity Capture attempts to relate records based on the data you saved in the new series.
- When you make critical changes to your series from your Microsoft calendar or Salesforce, Salesforce event descriptions and relationships to other records aren't retained. Events that you've edited to fall outside of the series are also updated and begin syncing again. Deleted events are re-created to include the critical changes and also begin syncing again. Critical changes to an event series include modifications to:
  - The all-day event checkbox
  - Appointment times (StartDateTime, Duration)
  - Recurrence patterns (RecurrenceType, Instance, Interval, DayOfMonth, DayOfWeekMask, MonthOfYear, DayOfWeekIndex)
  - Ranges of occurrences (Occurrences, EndDateOnly, EndKind)

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- If you edit the Assigned To field for an event series, the change causes issues when Salesforce syncs with your Microsoft calendar. To reassign an event series, we recommend that you delete the event series and re-create it with your desired Assigned To field.
- If you change the private flag on an individual event from a series, the change causes issues when Salesforce syncs with your Microsoft calendar. To set a different private flag for an individual event, we recommend that you create a standalone event.
- When an event series includes recurrence patterns supported in Microsoft but not in Salesforce, you can't see or edit the pattern in Salesforce. Instead, edit these events from your Microsoft calendar.

SEE ALSO:

[Events and Einstein Activity Capture](#)

## How Events Are Automatically Related to Contacts or Leads

Einstein Activity Capture can automatically relate synced Microsoft or Google events to relevant contacts or leads in Salesforce. Learn how that feature works, and how it interacts with other Salesforce options.

If your admin selects the **Relate synced events to Salesforce records** option from a configuration's advanced sync settings, then, when events sync to Salesforce, they are related to Salesforce records. Events are automatically related only under these conditions.

- Sales reps create their events in Microsoft or Google calendars.
- The attendee's email address matches an email address found on a contact or lead in Salesforce.
- The first time the event syncs from your Microsoft or Google calendars to Salesforce. After the first time the event syncs to Salesforce, subsequent matching contacts or leads invited to the event aren't automatically related. Likewise, when a user removes an attendee from an event, the attendee's name is removed from the Attendees field, but the matching related records aren't automatically removed from the event. But you can remove or replace the related record manually.
- If Salesforce [sharing rules](#) permit the event organizer to see the matching contacts or leads in Salesforce. (Or in record-level access terms, only View access to the matching records is needed.)

For events with an organizer and more than one attendee, you can't always predict which specific attendee or attendees "wins" as the related record or records. Which records are related depend on these two factors.

- Whether your admin has turned on [shared activities](#) (the Allow Users to Relate Multiple Contacts to Tasks and Events option on the Activity Settings page in Setup)
- The kinds of records (users, contacts, or leads) you have in Salesforce that include email addresses that match the attendees' email addresses.

### Matching Attendees with Records when Shared Activities Is Off

When shared activities is off, Einstein Activity Capture can relate only one Salesforce contact or lead to your event.

- For events with an organizer and only one attendee, Einstein Activity Capture searches for a contact or lead that matches that single attendee and relates it to the event.
- For events with more attendees, Einstein Activity Capture evaluates attendees for matches in a random order. Because only one related record is supported, the record that "wins" is dependent on the random order attendees are evaluated and the matching contact or lead you have in Salesforce.

Sometimes Einstein Activity Capture finds multiple Salesforce records that match a single attendee's email address. In that case, here's how records are related when shared activities is off.

If the attendee's email address matches these Salesforce records	...Salesforce adds this record to the Attendee field	... and Einstein Activity Capture automatically relates this record to the event.
A contact and a lead	The contact	The contact
A Salesforce user and either or both:	The Salesforce user	The contact. If no matching contact is found, the lead.

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<b>If the attendee's email address matches these Salesforce records</b>	<b>...Salesforce adds this record to the Attendee field</b>	<b>... and Einstein Activity Capture automatically relates this record to the event.</b>
<ul style="list-style-type: none"> <li>• A contact</li> <li>• A lead</li> </ul>		

### Matching Attendees with Records when Shared Activities Is On

When shared activities is on, Einstein Activity Capture can relate up to 50 matching contacts or one matching lead to your event.

- For events with an organizer and only one attendee, Einstein Activity Capture searches for a contact or lead that matches that single attendee and relates it to the event.
- For events with more attendees, Einstein Activity Capture first searches all attendees for matching Salesforce contacts and relates the first 50 that are located. If no matching contacts are found, Einstein Activity Capture searches all attendees for a matching Salesforce lead and relates the first one that's located.

Sometimes Einstein Activity Capture finds multiple Salesforce records that match a single attendee's email address. In that case, here's how records are related when shared activities is on.

<b>If the attendee's email address matches these Salesforce records</b>	<b>...Salesforce adds this record to the Attendee field</b>	<b>... and Einstein Activity Capture automatically relates this record to the event.</b>
A contact and a lead	The contact	The contact
A Salesforce user and either or both: <ul style="list-style-type: none"> <li>• A contact</li> <li>• A lead</li> </ul>	The Salesforce user	If a contact or lead has the same email address as a Salesforce user, and that user has already been added to the Attendees field, Einstein Activity Capture doesn't relate the matching contact or lead to the event. Instead, Einstein Activity Capture evaluates the rest of the event attendees, looking for up to 50 matching contacts, and relate them. If no contacts are found, Einstein Activity Capture evaluates the rest of the event attendees, looking for one matching lead, and relates it.

### What to Expect When No Matching Contact or Lead Is Found

If no contacts or leads match your event attendee's email address, synced events are added to the Unresolved Items list in your Personal Settings in Salesforce. From there, you can choose which Salesforce contacts or leads to relate. Or you can remove the event from the list and opt not to relate a record.

SEE ALSO:

[Events and Einstein Activity Capture](#)

## How Private Events Sync with Einstein Activity Capture

When a Salesforce admin selects the Sync private events setting in Einstein Activity Capture configurations, events that reps mark as private can sync between Salesforce and your Microsoft or Google calendar. When a private event syncs, it's marked as private in both calendar applications. However, some situations aren't supported for private events, such as attendee sync and automatically relating contacts or leads.

### When Do Private Events Sync?

After you turn on the setting, a rep's private events sync according to the rep's sync direction.

- If the private event is new, the event syncs after a rep creates the event.
- If a rep created the private event before you turned on the setting, the event syncs after a rep updates the event.

Only an admin can see whether private events are set up to sync for reps or which sync direction is set. It's important that you explain the sync setup to reps so that they can prepare their calendars accordingly—and keep Great Aunt Alberta's 95th birthday party out of Salesforce.

If you turn off the Sync private events setting, private events are no longer queued for sync. A version of each private event that was previously synced remains in both Salesforce and reps' external calendars until reps delete one or both. If reps notice that a few private events sync one last time, those changes were likely queued for sync before you turned off the setting.

### Who Sees Reps' Private Events When They Sync?

The amount of event information that rep's colleagues see depends on which application events are viewed from.

- In Salesforce, a private event's start and end times are visible to colleagues, but event details are hidden. All private event details are visible to Salesforce admins who can view, edit, and report on events. Reps can choose to share more private event details with their colleagues by changing their calendar sharing in their Personal Settings.
- In external calendars, the calendar application determines how private event details are shared with colleagues and supervisors. Refer to the documentation for your calendar application.

### How Does Einstein Activity Capture Handle Attendees and Related Records on Private Events?

Salesforce doesn't support adding attendees (Lightning Experience and Salesforce app), invitees (Salesforce Classic), or related records to private events. Therefore, attendees added to private events from Microsoft or Google calendars don't sync to Salesforce. Likewise, Salesforce users who are invited to private events from Microsoft or Google calendars can't see the event on their Salesforce calendars. And records can't be automatically related to events marked as private, even if the Relate synced events to Salesforce records setting is selected in a rep's sync configuration.

Here's how private events sync is managed when reps set or change the private setting on events.

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Rep's action	From this application	Sync outcome	Sync back outcome (occurs for reps set to sync both ways)
Rep creates a private event.	Exchange or Google Calendar	The event syncs to Salesforce as private.  If the event includes attendees, the attendee field doesn't sync to Salesforce. The event doesn't sync to Salesforce for any of the meeting attendees who are Salesforce users.	If the event is updated in Salesforce, when it syncs back to Exchange or Google, attendees remain on the Exchange or Google version of the event.
	Salesforce	The event syncs to Exchange or Google as private.	No unexpected outcome.
Rep converts a syncing, private event to public.	Exchange or Google Calendar	When the event syncs to Salesforce, the event is marked as public.  If the event includes attendees, the attendee field syncs to Salesforce. The event syncs to Salesforce for any of the meeting attendees who are Salesforce users.	No unexpected outcome.
	Salesforce	When the event syncs to Exchange, Einstein Activity Capture doesn't convert the event to public. The event is updated in Salesforce and remains private in Exchange.  When the event syncs to Google, the event is marked as public. If the rep adds attendees after converting the event to public, the attendees field syncs to Google.	No unexpected outcome.
Rep converts a syncing, public event to private.	Exchange or Google Calendar	<ul style="list-style-type: none"> <li>If the Exchange or Google version of the event includes no attendees or related records, the event syncs to Salesforce as private.</li> <li>If the Exchange or Google version of the event includes attendees or related records, Einstein Activity Capture</li> </ul>	If the event remains public in Salesforce and the Exchange or Google version of the event is private, Einstein Activity Capture immediately syncs the event back as private.

Rep's action	From this application	Sync outcome	Sync back outcome (occurs for reps set to sync both ways)
		<p>doesn't convert the event to private in Salesforce. The event remains as public, and attendees and related records are retained.</p>	
	Salesforce	<p>When the event syncs to Exchange, Einstein Activity Capture doesn't convert the event to private. The event is updated in Salesforce and remains public in Exchange.</p> <p>When the event syncs to Google:</p> <ul style="list-style-type: none"> <li>• If the Salesforce version of the event includes no attendees or related records, the event syncs to Google as private.</li> <li>• If the Salesforce version of the event includes attendees or related records, the rep is required to remove both before the event can be converted to private. Then the event can be saved and syncs to Google as private.</li> </ul> <p>Any previously syncing attendees remain on the Google version of the event.</p>	<p>If any future updates are made to the attendees field from Google, the changes don't sync to Salesforce as long as the event remains private.</p>
Rep converts one occurrence of a syncing, public event series to private.	Salesforce	<p>Microsoft doesn't allow one occurrence of a series to have a different privacy setting than the rest of the series. When Einstein Activity Capture queues the event for sync, it reverts the occurrence back to public in Salesforce because the change can't sync to the Microsoft calendar.</p> <p>If reps removed any attendees or related records before saving</p>	No unexpected outcome.

Rep's action	From this application	Sync outcome	Sync back outcome (occurs for reps set to sync both ways)
		the record in Salesforce, those items are restored.	
Rep converts one occurrence of a syncing, private event series to public.	Salesforce	Microsoft doesn't allow one occurrence of a series to have a different privacy setting than the rest of the series. When Einstein Activity Capture queues the event for sync, it reverts the occurrence back to private in Salesforce because the change can't sync to the Microsoft calendar.	No unexpected outcome.

Reps can convert one occurrence of a syncing event series if the event series was created in an Exchange Calendar, Lightning Experience, or the Salesforce app. Event series sync isn't supported for Google Calendar or Salesforce Classic.

SEE ALSO:

[Events and Einstein Activity Capture](#)

## How to Respond to Event Invitations from Your Microsoft or Google Calendar

To avoid overwriting your attendance status when syncing with Einstein Activity Capture, consider your sync direction before you accept and decline event invitations.

If you work in Lightning Experience or the Salesforce mobile app, accepting and declining event invitations isn't available.

If you work in Salesforce Classic, accepting and declining invitations is possible but isn't recommended for Einstein Activity Capture users who sync events in certain directions. Because responses to event invitations don't sync from Salesforce to your Microsoft® or Google Calendar™, you can unintentionally override your attendance status. To avoid doing so, learn how sync directions impact which application to use when responding to event invitations. If you're not sure what direction your events are syncing, talk to your Salesforce admin.

Sync Direction	Application to Respond from	Reason
<ul style="list-style-type: none"> <li>Exchange to Salesforce</li> <li>Google to Salesforce</li> <li>Both Ways</li> </ul>	<ul style="list-style-type: none"> <li>Microsoft Exchange–based calendar</li> <li>Google Calendar</li> </ul>	<p>Because your response syncs to Salesforce, the status is accurate in both applications.</p> <p>If you respond from Salesforce, your status is overwritten the next time Microsoft or Google events sync to Salesforce.</p>
<ul style="list-style-type: none"> <li>Salesforce to Exchange</li> <li>Salesforce to Google</li> </ul>	<ul style="list-style-type: none"> <li>Microsoft Exchange–based calendar</li> <li>Google Calendar</li> <li>Salesforce</li> </ul>	<p>Because responses don't sync from Salesforce to Microsoft or Google, your attendance status remains only in the application where you responded. To show your attendance status in both applications, you have to respond in both applications.</p>

### SEE ALSO:

[How Event Attendees Sync with Einstein Activity Capture Events and Einstein Activity Capture](#)

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## Field Mappings for Event Sync

When you use Einstein Activity Capture to sync events, fields from your Salesforce events are mapped to fields in the connected Microsoft or Google account. Learn which fields sync and how they're mapped. Plus, see which Microsoft® Exchange field mappings Salesforce admins can customize.

### Microsoft

Admins customize field mappings from the Field Mappings tab when editing a configuration. Admins can't customize mappings for standard fields that are used to match events during the sync process. For example, events are synced based on the date, and start and end time, so those field mappings can't be changed. Custom Salesforce fields aren't used in mappings.

Salesforce Field	Exchange Field (API Label)	Customizable Mapping	Details
All-Day Event	All Day (IsAllDayEvent)	No	
Attendees*	No field label	No	<p>The Salesforce Attendees field must be added to the event page layout to see the attendees list in Salesforce.</p> <p>To understand how the attendees field and attendee responses sync, see <a href="#">Event Attendee Sync</a>.</p> <p>In Outlook, this field is shown as an icon, with a text field to add attendees and mark them as required or optional. The API labels for the Exchange fields are RequiredAttendees AND OptionalAttendees. Salesforce syncs both Exchange fields with Attendees.</p>
Description	Notes (Body)	Yes	
Duration	Duration (Duration)	No	
End	No field label	No	In Outlook, this field is shown as an icon, with the options to select an end time or day.

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Salesforce Field	Exchange Field (API Label)	Customizable Mapping	Details
			The API label for the Exchange field is End.
Location	No field label	Yes	In Outlook, this field is shown as an icon, with a text field to add a location. The API label for the Exchange field is Location.
Assigned To	Organizer (Organizer)	No	
Private	Private (Sensitivity)	No	In Outlook, Private is one of the options for this field. Only Private shows in Outlook.
Reminder Date/Time	Remind Me (ReminderMinutesBeforeStart)	Yes	In Outlook, this field is shown as part of the Remind Me field.
Reminder Set	Remind Me (IsReminderSet)	Yes	In Outlook, this field is shown as part of the Remind Me field.
Repeat	Repeat (AppointmentType)	No	Repeating event details sync only if you enable Einstein Activity Capture, add the Repeat field to the Salesforce event page layout, and enable Event series sync on users' Einstein Activity Capture configurations. In Outlook, this field is shown as Repeat on events from the edit page, and Series from the saved event.
Show Time As	Show as (LegacyFreeBusyStatus)	Yes	In Outlook, calendar availability is shown as Free, Tentative, Busy, Away, Out of office, or Working elsewhere. Outlook Tentative, Busy, and Away sync as Busy in Salesforce. Outlook Free and Working elsewhere sync as Salesforce Free, and Outlook Out of office syncs as Salesforce Out of office.
Start OR Time	No field label	No	The Salesforce field Time syncs with the Exchange field Start only if multiday events are enabled in Salesforce. Otherwise, the Salesforce field Start syncs with the Exchange field Start.

Salesforce Field	Exchange Field (API Label)	Customizable Mapping	Details
			In Outlook, this field is shown as an icon, with the options to select a start time or day. The API label for the Exchange field is Start.
Subject	No field label	No	In Outlook, this field is shown as an icon, with a text field to add an event title. The API label for the Exchange field is Subject.
Time Zone	Not shown	No	Outlook events don't show this field. The API label for the Exchange field is StartTimeZone.

## Google

Salesforce Field	Google Field (API Label)	Details
All-Day Event	All Day (isAllday)	
Attendees	Guests (attendees)	The Salesforce Attendees field must be added to the event page layout to see the attendees list in Salesforce.  To understand how the attendees field and attendee responses sync, see <a href="#">Event Attendee Sync</a> .
Description	Description (description)	
End	No field label	In Google Calendar, this field is shown with the options to select an end time or day. The API label for the Google field is end.
Location	Location (location)	
Assigned To	Organizer (organizer)	
Private	No field label	In Google Calendar, this field is shown with the options to select an end time or day. The API label for the Google field is visibility.
Reminder Date/Time	No field label	In Google Calendar, this field is shown as the options Default visibility, Public, or Private. The API label for the Google field is reminders.
Reminder Set	No field label	In Google Calendar, this option can be set by dismissing the Notification or Email

Salesforce Field	Google Field (API Label)	Details
		options. The API label for the Google field is isReminderSet.
Show Time As	No field label	In Google Calendar, this field is shown as an icon with the options Busy or Free. In the Google API, this field is status.
Start OR Time	No field label	In Google Calendar, this field is shown with the options to select a start time or day. In the Google API, this field is start.  The Salesforce field Time syncs with the Google field Start only if multiday events are enabled in Salesforce. Otherwise, the Salesforce field Start syncs with the Google field Start.
Subject	No field label	In Google Calendar, this field is a text field with Add title in the field prompt. In the Google API, this field is summary.
Time Zone	Time Zone (timeZone)	

## SEE ALSO:

[Events and Einstein Activity Capture](#)

## Contacts and Einstein Activity Capture

Learn about what happens when contacts are enabled in an Einstein Activity Capture configuration.

### [Guidelines for Using Contacts with Einstein Activity Capture](#)

Make sure you understand how Einstein Activity Capture works with contacts.

### [How Contacts Sync with Einstein Activity Capture](#)

If you use Einstein Activity Capture, learn about how we sync your Microsoft or Google contacts with Salesforce contacts and accounts. Also, learn what we do when we can't find a match.

### [Guidelines for Filtering Contacts](#)

Contact sync filters let you choose which contacts sync from Salesforce to users' Microsoft or Google application. Learn about how sync filters work differently, depending on how they're set.

### [Field Mappings for Contact Sync](#)

When you use Einstein Activity Capture to sync contacts, fields from your Salesforce contacts are mapped to fields in the connected Microsoft or Google account. Learn which fields sync and how they're mapped. Plus, see which Microsoft® Exchange field mappings Salesforce admins can customize.

#### SEE ALSO:

[End-User Setup for Einstein Activity Capture Einstein Activity Capture](#)

#### EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter, Professional, Enterprise, Performance, and Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance and Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

Available with Inbox in Sales Cloud, which is included in **Starter, Performance and Unlimited** Editions and available for an extra cost in **Professional and Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Sales Engagement in Sales Cloud, which is included in **Performance and Unlimited** Editions, and available for an extra cost in **Professional and Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise and Unlimited** Editions

## Guidelines for Using Contacts with Einstein Activity Capture

Make sure you understand how Einstein Activity Capture works with contacts.

### General

- When contacts move from the connected account to Salesforce, they become Salesforce records and are available in standard reporting and Salesforce platform capabilities. See [What Does Einstein Activity Capture Do?](#)
- When you're setting filter conditions that contacts must meet in order to sync, formula fields and custom fields aren't supported. See [Filters for Contact Sync](#).
- When you're setting record ownership filters that contacts must meet in order to sync, select the Contacts Users Own option for the best experience. That way, your users can focus on the contacts that are most important to them.
- Use folders or groups to control which contacts sync. See [Preparing to Sync Contacts with Einstein Activity Capture](#).
- If you're set up to sync from your connected account to Salesforce or both ways, to prevent unresolved contacts, we recommend creating related records in Salesforce before turning on contact sync.
- Einstein Activity Capture can sync up to 50,000 contacts per user. An additional nonsyncing contact is picked up for sync only when one of the 50,000 stops syncing. A contact stops syncing if it's deleted or if a contact sync issue occurs.
- In your connected account, if you delete a contact and then restore it, that contact starts syncing approximately 24 hours after restoration.
- Some factors can impact sync wait time, such as when:
  - Many users are set up to start syncing around the same time.
  - Sync is pending for a significant number of contacts.

### Unresolved Contacts

Sometimes Einstein Activity Capture can't match contacts or accounts. When that happens, Einstein Activity Capture lists those records on the Unresolved Items page in your personal settings.

To match unresolved contacts, Salesforce determines whether to sync the Microsoft or Google contact to a Salesforce contact or to create a contact. Or you can update the Salesforce contact with the information required to find a match, such as first name, last name, company name, or email address.

If you don't resolve unmatched Salesforce contacts before the next sync cycle, Einstein Activity Capture removes the company name from Microsoft or Google contacts.

### Sync Conflicts

If an update you made in Salesforce didn't sync to your connected account, you could have experienced a sync conflict. Sync conflicts can occur when at least one of these conditions is true.

- You're set up to sync contacts both ways.
- You, another user with access, or an automated action updates the contact in your external application and Salesforce before Einstein Activity Capture syncs the change.

### EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter, Professional, Enterprise, Performance,** and **Unlimited** Editions

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Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

If a sync conflict occurs, Einstein Activity Capture gives preference to the contact in your connected account. If automatic mass contact updates are made from your connected account or Salesforce, you're likely to experience sync conflicts more often. Companies usually make mass contact updates when admins or developers set up automation or create custom API calls to create or update Salesforce, Microsoft, or Google contacts.

## Deleting Synced Contacts

When you delete a synced contact in Salesforce or your connected account, the contact isn't automatically removed from the other application. To avoid duplicate contacts and contact re-creation, make sure you delete synced contacts properly. How you delete a synced contact depends on your contact sync configuration. In some cases, users can't delete synced contacts.

If you're set up to sync from Salesforce to a connected account, delete the contact from Salesforce.

If you're set up to sync from a connected account to Salesforce or to sync both ways, how you delete a synced contact depends on your event sync settings.

- To delete a contact when the Sync private events setting is turned off, mark the contact as private in your connected account and delete it from Salesforce.
- To delete a contact when the Sync private events setting is turned on, delete the contact from Salesforce and your connected account. If you're set up to sync with the All Contacts contact filter, make sure your admin deletes the contact from all users' connected accounts.

When you use the Sync Contacts Users Follow in Chatter contact filter, you can't delete a synced contact if at least one user follows the contact in Chatter.

### SEE ALSO:

[End-User Setup for Einstein Activity Capture](#)

[Einstein Activity Capture](#)

## How Contacts Sync with Einstein Activity Capture

If you use Einstein Activity Capture, learn about how we sync your Microsoft or Google contacts with Salesforce contacts and accounts. Also, learn what we do when we can't find a match.

### How Contacts Sync with Salesforce Records

When Einstein Activity Capture runs its initial contact sync, it checks to see whether contacts with the same email address exist in Salesforce and your connected account. If Einstein Activity Capture finds contacts with matching email addresses, the two contacts are [mapped to each other](#) and begin to sync. If Einstein Activity Capture can't find a contact with a matching email address, it checks whether contacts with the same first and last name exist.

If multiple contacts in Salesforce have matching email addresses, Einstein Activity Capture with the contact with the most recent activity, most recent updated date, or oldest creation date, depending on your sync configuration.

If no match is found in Salesforce or your connected account, a new matching contact is created.

After the initial sync, Einstein Activity Capture periodically checks whether contacts require syncing.

Einstein Activity Capture also checks whether a contact's company name matches a Salesforce account's company name. If a match is found, the Salesforce account is related to the synced contact in Salesforce. If no match is found, the synced contact is added to the Unresolved Items list in Salesforce.

 **Note:** Contact sync doesn't support Outlook categories, so contacts labeled with a Salesforce\_Sync category that don't exist in a contacts subfolder of the same name don't sync with Salesforce. To avoid this issue, disable contact categories and select the Salesforce\_Sync folder for new contacts in Outlook. See [EAC - New Contacts Created In Outlook with 'Salesforce\\_Sync' Category Do Not Sync to Salesforce](#).

### How Person Accounts Sync with Salesforce Records

If your admin enabled person accounts in Salesforce, your person accounts sync with contacts in your connected account. Person accounts sync the same way as contacts do. Here are a few things to keep in mind when syncing person accounts.

- If you're set up to sync contacts from your connected account to Salesforce or both ways, create person accounts in Salesforce before you start syncing.
- To match person accounts and contacts, Einstein Activity Capture compares the First Name and Last Name fields in Salesforce to the Company field in your connected account. Changes to the First Name, Last Name, and Company fields don't sync between applications.

SEE ALSO:

[Field Mappings for Contact Sync](#)

[Guidelines for Filtering Contacts](#)

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Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

## Guidelines for Filtering Contacts

Contact sync filters let you choose which contacts sync from Salesforce to users' Microsoft or Google application. Learn about how sync filters work differently, depending on how they're set.

You can define contact sync filters from the General Settings and Advanced Settings tabs when editing a configuration.

### EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

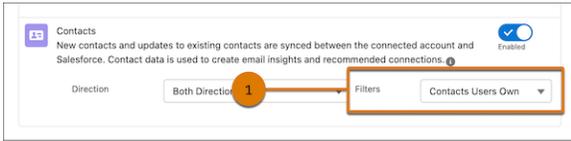
Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

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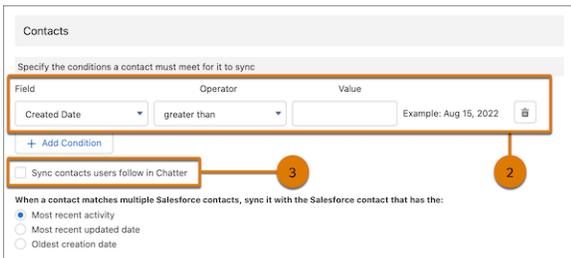
Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

### Options for Filtering Contacts



Use the record ownership filter (1) to sync contacts to your users’ connected accounts based on who owns the contact record. When you select **All Contacts**, all Salesforce contacts that users can access sync with your users’ connect account. Access to Salesforce contacts is based on your sharing settings. When you select **Contacts Users Own**, only contacts that users own sync with users’ connected accounts. And when a synced contact is updated, those changes sync for the current owner only. For the best experience, select **Contacts Users Own**. That way, your sales reps can focus on the contacts that are most important to them.



Optionally, use condition filters (2) to sync contacts to your users’ connected accounts based on contact record field values. To sync, contacts must meet all the condition filters you set. You can also select **Sync contacts users follow in Chatter** (3) to sync contacts to your users’ connected accounts based on which contacts they follow in Chatter.

### How Sync Contacts Users Follow in Chatter Works

The Sync Contacts Users Follow in Chatter filter works differently depending on your record ownership and condition filters.

RECORD OWNERSHIP FILTER	ANY CONDITION FILTERS?	CONTACTS THAT SYNC
All Contacts	No	All Salesforce contacts that users can access sync to users’ connected accounts, including contacts that users follow in Chatter.
	Yes	Salesforce contacts that users can access, including contacts that users follow in Chatter, sync to your users’ connected accounts only if they meet the condition filters.
Contacts Users Own	No	All Salesforce contacts that users own plus the contacts that users follow in Chatter sync to users’ connected accounts.
	Yes	Salesforce contacts that users own sync to your users’ connected accounts only if they meet the condition filters. Also, the Salesforce contacts that users follow in Chatter sync to users’ connected accounts,

RECORD OWNERSHIP FILTER	ANY CONDITION FILTERS?	CONTACTS THAT SYNC
		even if those contacts don't meet the condition filters.

## SEE ALSO:

[Create a Configuration for Einstein Activity Capture](#)[Preparing to Sync Contacts with Einstein Activity Capture](#)

## Field Mappings for Contact Sync

When you use Einstein Activity Capture to sync contacts, fields from your Salesforce contacts are mapped to fields in the connected Microsoft or Google account. Learn which fields sync and how they're mapped. Plus, see which Microsoft® Exchange field mappings Salesforce admins can customize.

### Microsoft Exchange

Admins customize field mappings from the Field Mappings tab when editing a configuration. Admins can't customize mappings for standard fields that are used to match contacts during the sync process. For example, contacts are synced based on the email address, so the email field mappings can't be changed. Custom Salesforce fields aren't used in mappings.

Salesforce Field	Exchange Field (API Label)	Customizable Mapping	Details
Account Name	Company (CompanyName)	No	
Assistant	Assistant name (AssistantName)	Yes	
Assist. Phone	Assistant phone (AssistantPhone)	Yes	
Birthdate	Birthday (Birthday)	Yes	
Department	Department (Department)	Yes	
Description	Notes (Body)	Yes	
Email	Email address (EmailAddress1)	No	
Fax	Business fax (BusinessFax)	Yes	
First Name	First name (GivenName)	No	
Home Phone	HomePhone	Yes	
Last Name	Last name (Surname)	No	
Mailing City	Business address City (BusinessAddressCity)	Yes	
Mailing Country	Business addresses Country/Region (BusinessAddressCountryRegion)	Yes	
Mailing State/Province	Business address State/Province (BusinessAddressState)	Yes	

### EDITIONS

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Salesforce Field	Exchange Field (API Label)	Customizable Mapping	Details
Mailing Street	Business address Street (BusinessAddressStreet)	Yes	
Mailing Zip/Postal Code	Business address Zip/Postal code (BusinessAddressPostalCode)	Yes	
Mobile	Mobile phone (MobilePhone)	Yes	
Other City	Other address City (OtherAddressCity)	Yes	
Other Country	Other address Country/Region (OtherAddressCountryOrRegion)	Yes	
Other Phone	Other (OtherTelephone)	Yes	In Outlook, this field is located under the Phone menu when you add more fields to the contact.
Other State/Province	Other address State/Province (OtherAddressState)	Yes	
Other Street	Other address Street (OtherAddressStreet)	Yes	
Other Zip/Postal Code	Other address Zip/Postal code (OtherAddressPostalCode)	Yes	
Phone	Business phone (BusinessPhone)	Yes	
Title	Job title (JobTitle)	Yes	

## Google

Salesforce Field	Google Field (API Label)	Details
Account Name	Company (companyName)	
Assistant	Relationship (relation)	Standard label Assistant required.*
Birthdate	Birthday (birthday)	
Department	Department (orgDepartment)	
Email	Email (email)	When creating contacts in Google, the primary Email field must include the standard label Work for the contact to sync. Adding no label, other standard labels, or custom labels prevents the Google contact from syncing to Salesforce.
Fax	Phone (faxNumber)	Standard label Work Fax required.*

Salesforce Field	Google Field (API Label)	Details
First Name	First name (givenName)	
Home Phone	Phone (homePhoneNumber)	Standard label Home required.*
Last Name	Last name (familyName)	
Mailing City	City (city)	Standard label Work required on the Google address.*
Mailing Country	Country/Region (country)	Standard label Work required on the Google address.*
Mailing State/Province	State (state)	Standard label Work required on the Google address.*
Mailing Street	Street address (street)	Standard label Work required on the Google address.*
Mailing Zip/Postal Code	ZIP code (postCode)	Standard label Work required on the Google address.*
Mobile	Phone (mobilePhoneNumber)	Standard label Mobile required.*
Other City	City (otherCity)	Standard label Other required on the Google address.*
Other Country	Country/Region (otherCountry)	Standard label Other required on the Google address.*
Other Phone	Phone (otherPhoneNumber)	Standard label Other required.*
Other State/Province	State (otherState)	Other label required on the Google address.*
Other Street	Street address (otherStreet)	Standard label Other required on the Google address.*
Other Zip/Postal Code	ZIP code (otherPostCode)	Standard label Other required on the Google address.
Phone	Phone (phone)	Standard label Work required.
Title	Job title (title)	

\* Adding no label, a different standard label, or a custom label prevents these fields from syncing.

SEE ALSO:

[How Contacts Sync with Einstein Activity Capture](#)

## Reporting on Logged and Captured Activities from Einstein Activity Capture

Use standard reports to keep an eye on all your activities and customer interactions. Turn on Activity 360 Reporting to enable reporting objects that unify your automatically captured data from Einstein Activity Capture (EAC) with all your other activity data, such as calls, manually logged tasks, and emails. View the out-of-the-box dashboard and reports to easily monitor your team's activity. Trigger flows from Activity 360 Reporting data to automate your business processes.

Activity 360 Reporting turns on unified reporting objects that aggregate your activity and insight data.

The UnifiedActivity object stores all your activities, from manually logged to automatically captured sources. For example, it includes calls from Einstein Conversation Insights (ECI), tasks, events, and emails both manually logged and captured by EAC. Type-specific objects, such as UnifiedTask, let you create reports that are specific to a particular activity type.

- Unified Activities: All activity data across all channels
- Unified Emails: Emails from EAC and emails from manual logging
- Unified Tasks: Tasks from manual logging
- Unified Voice Calls: Calls from Einstein Conversation Insights and calls from manual logging
- Unified Video Calls: Videos from ECI
- Unified Meetings: Events synced from EAC and events from manual logging

Insights include data from these sources.

- Insights on emails from EAC
- Conversation Insights on voice and video calls from ECI

### [Considerations for Activity 360 Reporting](#)

Learn what to expect when you turn on Activity 360 reporting for Einstein Activity Capture (EAC).

### [Set Up Activity 360 for Einstein Activity Capture](#)

Get set up to use Activity 360 reporting, Pipeline Inspection deal insights, and automated actions triggered by email insights. Prepare your Salesforce org to use standard reports so that sales managers can monitor their team's activities across all channels, such as emails, email and call insights, or manually and automatically captured tasks.

### [Get Started with Activity 360 Reports](#)

Use the provided Activity 360 reports, or clone the reports to meet your business needs. Review the suggestions and tips for custom report types to help you create your own reports and dashboards.

### EDITIONS

Available in: Lightning Experience

Available with **Einstein 1 Sales Edition**

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions and for an extra cost in **Enterprise** Edition

Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

## Considerations for Activity 360 Reporting

Learn what to expect when you turn on Activity 360 reporting for Einstein Activity Capture (EAC).

### Activity Data Is Available in Reports After You Turn on Activity 360 Reporting

Only activity data created after Activity 360 reporting is supported for reporting and flows. Historical data isn't available in Activity 360 reports.

Because Activity 360 reporting starts capturing data only after you enable the setting, recurring events don't appear automatically. To report on preexisting recurring events, you can edit the recurring event or an instance of the event.

### Who Can Access Data in Unified Reports?

Users with an Einstein Activity Capture permission set can view reports on unified activities. For users without an EAC permission set, they can see the same records in reports only if the setting Activity Sharing with Non-Einstein Activity Capture Users is enabled.

### Record Visibility and Sharing

Unified reports follow the EAC Sharing and Salesforce sharing models. The activities that a user sees on the activity timeline are consistent with the activities that they can see in these reports. Before turning on unified reports, make sure that you review the email sharing considerations.

 **Note:** Only activity data created after Activity 360 reporting is turned on is available in reports.

For reports where User is the primary object, such as Unified Activities grouped by users, reports respect the role hierarchy sharing model. With no role hierarchy, the user sees only their own records and activities.

A report entry with \*\*\*\*\* in the subject and description is an email that the user doesn't have access to based on sharing settings. The data is consistent with what users see on the activity timeline, where the user sees only an envelope and the email insight but not the email details.

### Object Existence Considerations

Objects must exist before email capture for reporting. For opportunities, the opportunity contact role must already be created for emails to be linked to opportunities. Similarly for accounts, the contact has to be linked to the account. If the contact is on multiple accounts, only the primary account is used.

### Email Sharing Considerations

When you turn on Activity 360 reporting, email sharing is streamlined. The sharing option Share with Groups isn't available on the activity timeline or as a user's email sharing preference. After you turn on Activity 360 reporting, you can't change the sharing policy on historical data, but you can see an email's sharing policy on the activity timeline.

### Email on Activity Timeline

For an email to be associated with a record on activity timeline, the record must exist when the email is captured by Einstein Activity Capture.

#### EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture in **Einstein 1 Sales Edition**

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions and for an extra cost in **Enterprise** Edition

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## Task Considerations

Only tasks with values in the Due Date or Completed Date field are included in the Unified Tasks object. Open tasks with no date and closed tasks with no completed date aren't supported for reporting.

## How Are Activities Linked to Related Records?

Activities can appear multiple times within a report based on their relationships to other Salesforce records. For example, a report using the Unified Activity Relations as the third-level object in the report type shows all records that relate to an activity, such as opportunities and contacts. When an activity is linked to multiple records, an entry for the activity appears for each of the related records. To avoid multiple entries for one activity, group by Unified Activity ID or filter by a specific related record type.

An email can be associated with up to 100 related Salesforce records. If records exceed the limit, Salesforce associates the email to 100 of the records and ignores the rest.

## Unified Activities Objects Are Available Only for Reporting and Flows

 **Note:** Starting in late 2023, Einstein Activity Capture services are migrating to Hyperforce, the Salesforce cloud-native infrastructure architecture, built for the public cloud. Before migration to Hyperforce, Einstein Activity Capture data is stored in Salesforce managed data centers and hosted on Amazon Web Services (AWS) behind a Virtual Private Cloud (VPC). After migration, the Einstein Activity Capture data and services are stored on Hyperforce and new AWS public cloud infrastructure, within the same region as before.

Emails and insights from EAC and ECI are stored on Salesforce Hyperforce and Amazon Web Services (AWS) infrastructure, not in standard Salesforce objects. As a result, the Activity 360 reporting and insights objects support standard reporting. Also, the insights objects support flows. They don't appear in Object Manager and they aren't supported for SOQL queries or in APIs.

## Voice and Video Call Considerations

The reporting measures for voice and video calls in Einstein Conversation Insights (ECI) have limitations when trying to filter records by insight types.

- When applying filter logic between insight type fields, the OR operator isn't supported. To run a report that shows records with specified insights only, apply a filter that uses the contains operator and enter comma-separated entries for the insight types you want to show.
- It isn't possible to run a report that displays call records that don't contain a specific insight.

## Is My Salesforce Org Eligible for Activity 360 Reporting?

Your org is eligible to use Activity 360 reporting if you have fewer than 1.5 million combined accounts, contacts, contracts, leads, and opportunities.

## Turning Off Activity 360 Reporting

By default, you can't turn off the setting for Activity 360 reporting after you enable it. To turn off Activity 360 reporting, contact Salesforce Customer Support.

## Other Features Powered by Activity 360

Because Activity 360 reporting unifies your activity data in one place, you also get access to a Pipeline Inspection feature that helps sales reps and managers see who's participating in a deal. If you use automated actions, you can trigger events and flows using email insights.

### SEE ALSO:

[Set Up Activity 360 for Einstein Activity Capture](#)

[Get Started with Activity 360 Reports](#)

## Set Up Activity 360 for Einstein Activity Capture

Get set up to use Activity 360 reporting, Pipeline Inspection deal insights, and automated actions triggered by email insights. Prepare your Salesforce org to use standard reports so that sales managers can monitor their team's activities across all channels, such as emails, email and call insights, or manually and automatically captured tasks.

Complete these prerequisites before you set up Activity 360 reporting.

- Turn on Einstein Activity Capture and set up email capture.
  - Make sure you have at least one user assigned to an active configuration to use Activity 360 features. See [Create a Configuration for Einstein Activity Capture](#) on page 377.
  - To report on events, make sure you have at least one configuration for events that syncs in **Both Directions** or **Microsoft Exchange to Salesforce**.
1. From Setup, enter *einstein activity capture* in the Quick Find box, and then select **Einstein Activity Capture**.
  2. Go to the Settings tab.
  3. Turn on **Activity 360 Reporting**.

After you turn on Activity 360 reporting, find out-of-the-box reports in the Reports tab and a prebuilt dashboard in the Dashboards tab.

To turn off Activity 360 reporting, contact Salesforce Customer Support.

### SEE ALSO:

[Turn On Pipeline Inspection](#)

[Turn On Automated Actions](#)

### EDITIONS

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### USER PERMISSIONS

To turn on Activity 360 Reporting:

- Customize Application

## Get Started with Activity 360 Reports

Use the provided Activity 360 reports, or clone the reports to meet your business needs. Review the suggestions and tips for custom report types to help you create your own reports and dashboards.

Activity 360 reports support up to 50,000 records. You can show up to 6 months of data in activity reports. If you receive an error, add filters to limit the report size.

An email can be associated with up to 100 related Salesforce records. If records exceed the limit, then Salesforce associates the email to 100 of the records and ignores the rest.

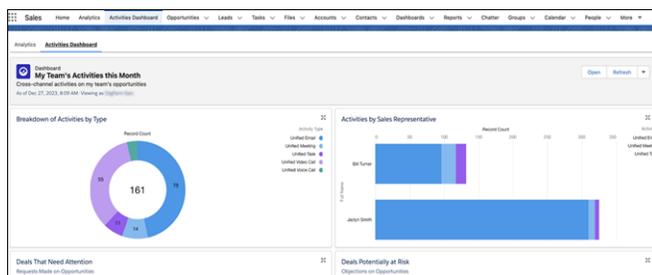
### Activity 360 Reports Folder

In the Reports tab, find the Activity 360 Reports folder. This folder contains prebuilt reports that show you all activities, including emails captured by Einstein Activity Capture, across Salesforce records such as accounts, opportunities, and contacts.

### Activity 360 Dashboard

To get a bird's-eye view of activities for the month, use the My Team's Activities This Month dashboard. In the Dashboards tab, select the Activity 360 folder. The dashboard uses some of the prebuilt reports so that you can quickly monitor.

If you have Activities Dashboard enabled, you can see the My Team's Activities This Month dashboard in the Activities Dashboard tab.



### Custom Report Types and Reports for Activities and Insights

Build custom report types using the unified activity and insights objects.

Follow these guidelines when you build a custom report type.

- For the primary object, select a CRM object such as user, opportunity, contact, lead, or account with related activities.

#### EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture in **Einstein 1 Sales Edition**

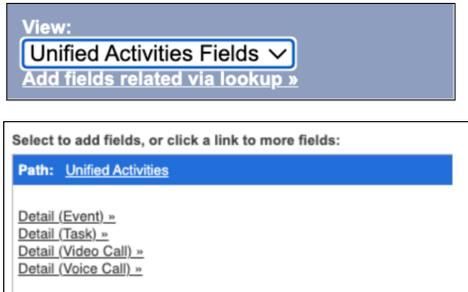
Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions and for an extra cost in **Enterprise** Edition

Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

- For the secondary object, select **Unified Activities** to report on all activities. To report on a specific type of activity, select one of the subtypes of Unified Activities. For example, to report on emails only, select **Unified Email**.

If you have custom fields for events or tasks, you can add them to your report via lookup. Edit the layout of available fields in the report type and select Add fields related via lookup.



- For the third-level object, select one of these objects.
  - Insights: Report on key insights from emails and calls.
  - Participants: Report on the contacts and users that participated in an activity and their role in the activity. For example, by selecting **Participants** you can see whether a user sent or received an email in the report.
  - Relations: Report on other Salesforce records that are related to the activity. For example, you can show opportunities, contacts, and accounts associated with the activity. An email can be associated with up to 100 related Salesforce records. If records exceed the limit, Salesforce associates the email to 100 of the records and ignores the rest.

SEE ALSO:

[Create a Custom Report Type](#)

[Turn on Additional Features for Einstein Conversation Insights](#)

## Analytics and Einstein Activity Capture

When you use Einstein Activity Capture, you can use the Activities dashboard or Activity Metrics to see your activity data aggregated.

### [Activities Analytics Dashboard](#)

The Activities analytics dashboard provides a summary of sales activities, including activities added manually and with Einstein Activity Capture.

### [Activity Metrics](#)

If you use Einstein Activity Capture, Activity Metrics gives you the complete picture about your activity data. When you include Activity Metrics fields on list views, page layouts, reports, triggers, processes, and so forth, the data reflects activities that were added to Salesforce manually and by Einstein Activity Capture.

#### SEE ALSO:

[Check Connection Status and Metrics for Einstein Activity Capture Users Einstein Activity Capture](#)

#### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud in: **Essentials, 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

Available with Sales Engagement, which is available for an extra cost in: **Enterprise, Performance,** and **Unlimited** Editions

Available with Revenue Intelligence, which is available for an extra cost in: **Enterprise** and **Unlimited** Editions

## Activities Analytics Dashboard

The Activities analytics dashboard provides a summary of sales activities, including activities added manually and with Einstein Activity Capture.

### [Give Users Access to the Activities Analytics Dashboard](#)

The Activities dashboard provides a summary of sales activities, including activities added manually and with Einstein Activity Capture. Make sure the dashboard is turned on, and then give users access to it.

### [Review the Activities Analytics Dashboard](#)

Einstein Activity Capture includes access to the Activities dashboard, which is built on CRM Analytics. The Activities dashboard shows a summary of your sales activities, including ones added manually to Salesforce and ones added by Einstein Activity Capture. Because emails that are captured by Einstein Activity Capture aren't stored in Salesforce, they don't show up in standard Salesforce reports. Therefore, the dashboard gives you a complete picture of your activities.

### [Guidelines for Using the Activities Analytics Dashboard](#)

Einstein Activity Capture includes access to the Activities dashboard, which is built on CRM Analytics. The Activities dashboard shows a summary of your sales activities, including ones added manually to Salesforce and ones added by Einstein Activity Capture. Review keys details about the dashboard, including how activity fields are used.

#### SEE ALSO:

[Analytics and Einstein Activity Capture](#)

[Einstein Activity Capture](#)

#### 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

Available with Sales Engagement, which is available for an extra cost in: **Enterprise, Performance,** and **Unlimited** Editions

Available with Revenue Intelligence, which is available for an extra cost in: **Enterprise** and **Unlimited** Editions

## Give Users Access to the Activities Analytics Dashboard

The Activities dashboard provides a summary of sales activities, including activities added manually and with Einstein Activity Capture. Make sure the dashboard is turned on, and then give users access to it.

 **Note:** If you give sales reps access to the Activities dashboard, sometimes users see data that's normally hidden by access settings or field-level security.

1. From Setup, in the Quick Find box, enter *Einstein Activity Capture*, and then select **Settings**.
2. Click the Settings tab, and then turn on Activities Dashboard.
3. Give users access to the Activities dashboard by assigning a permission set. The license used to access Einstein Activity Capture determines which permission set users need.

License	Permission Set	Additional Information
Sales Cloud Einstein	<a href="#">Select Who Can Use Sales Cloud Einstein</a>	
Inbox	<a href="#">Analytics for Sales Cloud or Inbox With Einstein Activity Capture</a>	You can assign the permission set to up to five users. All other Inbox users have read-only access to the Activities dashboard. Users with read-only access can view the dashboard and use the filters, but they can't clone or edit the dashboard.
Sales Engagement	<a href="#">Analytics for Sales Cloud</a>	You can assign the permission set to up to three users. All other Sales Engagement users have read-only access to the Activities dashboard. Users with read-only access can view the dashboard and use the filters, but they can't clone or edit the dashboard.
Sales Cloud only	<a href="#">Standard Einstein Activity Capture</a>	The dashboard is read-only. Users can view the dashboard and use the filters, but they can't clone or edit the dashboard.
Revenue Intelligence	<a href="#">Select Who Can Use Revenue Intelligence</a>	Access to the Activities dashboard is available only to users who have the Revenue

### 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

Available with Sales Engagement, which is available for an extra cost in: **Enterprise, Performance,** and **Unlimited** Editions

Available with Revenue Intelligence, which is available for an extra cost in: **Enterprise** and **Unlimited** Editions

### USER PERMISSIONS

To turn on the Activities dashboard and give users access to it:

- Customize Application OR Modify All Data

License	Permission Set	Additional Information
		Intelligence Admin permission set.

## SEE ALSO:

[Assign a Permission Set License to a User](#)

[Review the Activities Analytics Dashboard](#)

[Guidelines for Using the Activities Analytics Dashboard](#)

[Einstein Activity Capture](#)

## Review the Activities Analytics Dashboard

Einstein Activity Capture includes access to the Activities dashboard, which is built on CRM Analytics. The Activities dashboard shows a summary of your sales activities, including ones added manually to Salesforce and ones added by Einstein Activity Capture. Because emails that are captured by Einstein Activity Capture aren't stored in Salesforce, they don't show up in standard Salesforce reports. Therefore, the dashboard gives you a complete picture of your activities.

Click the tab that corresponds with your Einstein Activity Capture license or permission.

- 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 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 or Sales Engagement 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

Available with Sales Engagement, which is available for an extra cost in: **Enterprise, Performance,** and **Unlimited** Editions

### USER PERMISSIONS

To view the Activities app and dashboard:

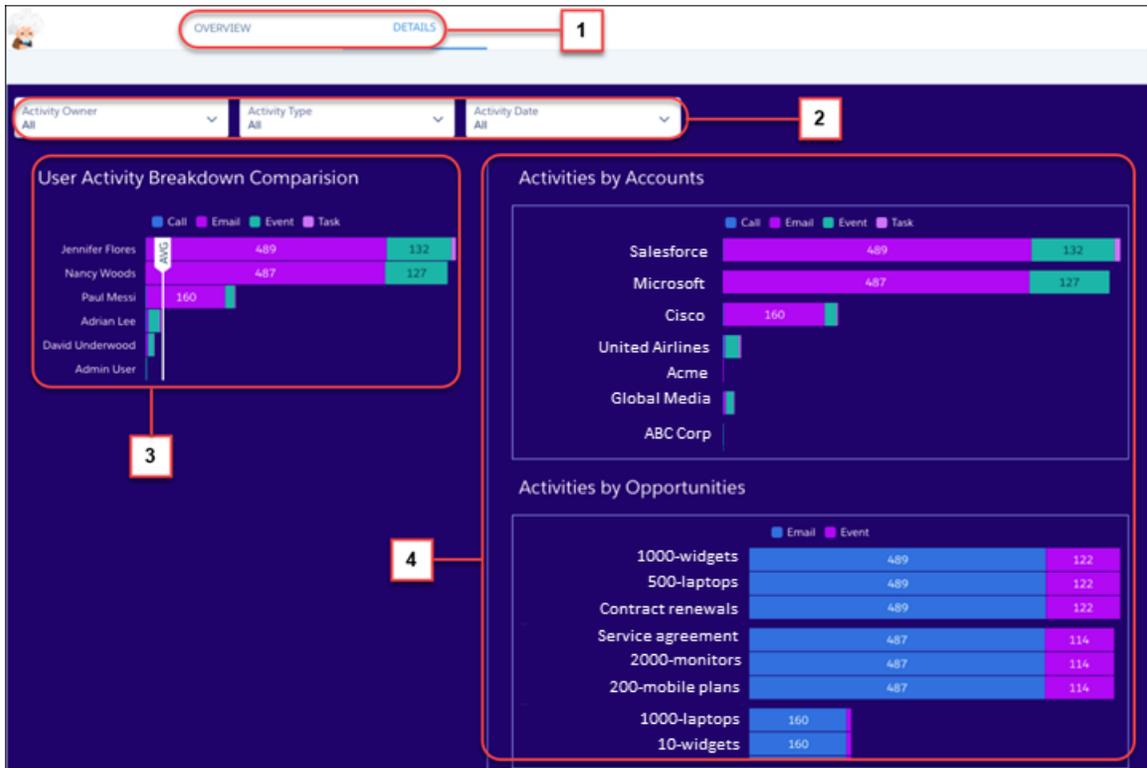
- Use Einstein Activity Capture AND Use CRM Analytics Templated Apps OR Access to View-Only Licensed Templates and Apps

To create CRM Analytics apps using the Activities app template:

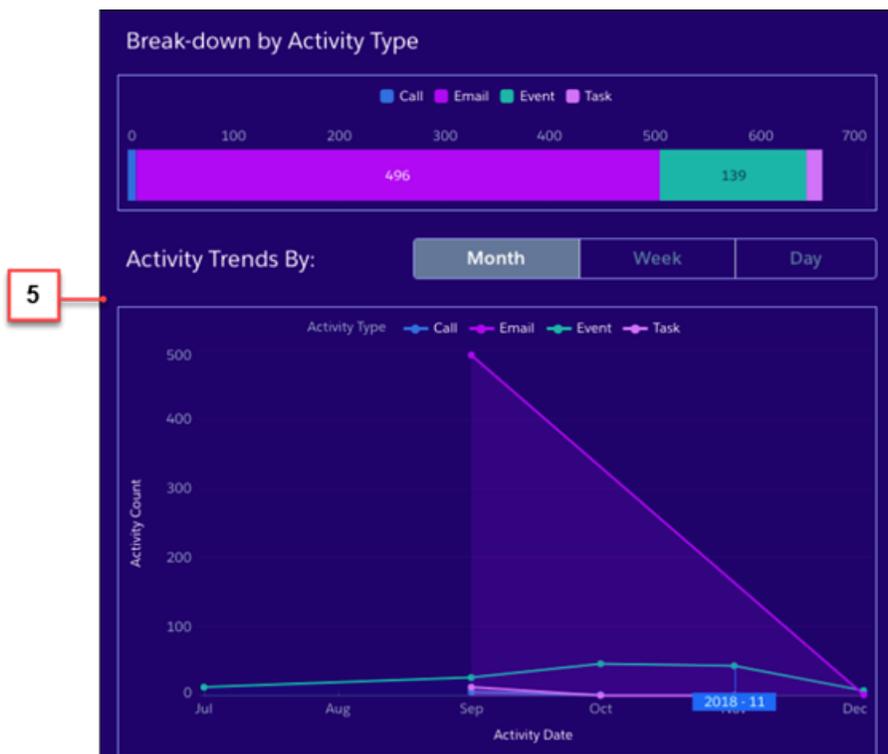
- Use Einstein Activity Capture AND Manage CRM Analytics Templated Apps

To delete or reset the Activities app:

- Manage CRM Analytics Templated Apps



Charts are organized by tabs (1). Use filters (2) to view information about specific activity owners, activity types, and dates. Quickly view which of the selected users are most active (3). The Details tab includes charts that break down activities by accounts and opportunities (4).



The Overview tab lets you see how each activity type is trending over the past month, week, or day (5). Licensed Einstein Activity Capture users see up to 180 days of activity data. Einstein Activity Capture Standard users see up to 90 days of activity data.

#### SEE ALSO:

- [Guidelines for Using the Activities Analytics Dashboard](#)
- [Give Users Access to the Activities Analytics Dashboard](#)
- [Einstein Activity Capture](#)

## Guidelines for Using the Activities Analytics Dashboard

Einstein Activity Capture includes access to the Activities dashboard, which is built on CRM Analytics. The Activities dashboard shows a summary of your sales activities, including ones added manually to Salesforce and ones added by Einstein Activity Capture. Review keys details about the dashboard, including how activity fields are used.

### General

- After Einstein Activity Capture is enabled, the Activities dashboard is created.
- To access the Activities dashboard, API access is required. If you use Professional Edition, you must purchase API access.
- To access the Activities dashboard with Revenue Intelligence, you must have the Revenue Intelligence Admin permission set.
- To use Activities dashboard, you must [enable Data Sync and Connections](#).
- Some Einstein Activity Capture users have read-only access to the Activities dashboard. For more information, see [Give Users Access to the Activities Analytics Dashboard](#).
- The Activities templated app doesn't support customizations, including changes to dashboards, dataflows, and recipes or use of the datasets in custom assets.

### Activities

- If you have Einstein Activity Capture Standard, 90 days of data appear on the Activities dashboard. If you have Einstein Activity Capture through Performance or Unlimited editions or an add-on license, 180 days of data appear on the dashboard. For more information, see [What Is Einstein Activity Capture Standard?](#)
- When you use role hierarchy, users see data for activities that they're involved in and activities that users below them in the role hierarchy own. If you don't use role hierarchy, users see data for all activities in the Activities dashboard dataset.
- It takes up to 24 hours to see email data in the dashboard.
- When you sync or capture events, you see event details and Salesforce records associated with attendees' email addresses on the external calendar event on the Activities dashboard.
- When you sync or capture an event that has only internal attendees, it doesn't appear on the Activities dashboard.
- When you create an event using the Salesforce calendar, and the event doesn't have a counterpart in your external calendar, the event doesn't appear on the Activities dashboard. However, if the event has only internal attendees, it does appear on the Activities dashboard.

### EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in **Professional, Enterprise, Performance, and Unlimited** Editions

Available with Sales Cloud Einstein, which is available **Performance and Unlimited** Editions, and for an extra cost in **Enterprise** Edition

Available with Inbox, which is available in **Professional, Enterprise, Performance, and Unlimited** Editions

Available with Sales Engagement, which is available in **Performance and Unlimited** Editions, and for an extra cost in **Professional and Enterprise** Editions

Available with Revenue Intelligence, which is available for an extra cost in: **Enterprise and Unlimited** Editions

- Events, tasks, and email messages that aren't synced or captured appear on the Activities dashboard, and are associated with Salesforce records using these fields: Account Name, Assigned To, Name, Related To.
- When you enable shared activities, you see event details and event attendees who are Salesforce users, contacts, or leads on the Activities dashboard. For more information, see [Considerations for Enabling Shared Activities](#).
- Only past events appear on the Activities dashboard.
- You can't filter the Activities dashboard by queues that own activities.

### Activity Fields

The following fields are used in the Activities dashboard dataset.

Multivalue fields aren't fully supported in ValuesTable. The Activities dashboard shows only one value in the array, not the full list of values.

Field Label (Field Name)	Description	Is a Multivalue Field
Account Id (Accounts.Account.Id)	Represents the ID of the account that's related to the activity. For activities that are Salesforce records, the account is related to the activity using the Name or Related To field.  For captured activities, the account is related to the activity by the contact's email address. These activities can also be related to accounts using other Salesforce objects.	Yes
Account Name (Accounts.Account.Name)	Represents the name of the account that's related to the activity.	Yes
Activity Date (Activity_Date)	For tasks, represents the completed date. For emails, represents the email sent date. For events, represents the start date.  This field has a timestamp set in the Coordinated Universal Time (UTC) time zone.	No
Activity Id (Activity_Id)	Represents the ID of the activity.	No
Activity Type (Activity_Type)	Represents the type of activity. Types include email, event, task, and subtask.	No
All Related Id (AllRelated.Related.Related_Id)	Indicates the ID of the record that's related to the activity.	Yes
All Related Name (AllRelated.Related.Related_Name)	Indicates the name of the record that's related to the activity.	Yes
All Related Type (AllRelated.Related.Related_Type)	Indicates the type of record that's related to the activity. Available types are account, contact, contract, lead, opportunity, and quote.	Yes
Customer (OtherPeople.Person.Person_Name)	The name of the contact or lead who's related to the activity. For activities that are Salesforce records, the Name field is used.  For captured activities (ones that aren't Salesforce records and appear only on the activity timeline), the email address is used.	Yes

Field Label (Field Name)	Description	Is a Multivalue Field
Opportunity Id (RelatedOpportunities.Related_Id)	The ID of the opportunity that's related to the activity.	Yes
Opportunity Name (RelatedOpportunities.Related_Name)	The name of the opportunity that's related to the activity.	Yes
Person Id (OtherPeople.Person.Person_Id)	The ID of the contact or lead who's related to the activity. For activities that are Salesforce records, the Name ID field is used. For captured activities (ones that aren't Salesforce records and appear only on the activity timeline), the email address is used.	Yes
Person Type (OtherPeople.Person.Person_Type)	Indicates whether the person related to the activity is a contact or lead.	Yes
Related Id (Related.Related.Related_Id)	The ID of the account, contract, lead, opportunity, or quote that's related to activity. An account ID is included only if the account is in the activity's Related To field.	Yes
Related Name (Related.Related.Related_Name)	The name of the account, contract, lead, opportunity, or quote that's related to activity. An account is included only if the account is in the activity's Related To field.	Yes
Related Type (Related.Related.Related_Type)	Indicates whether the record related to the activity is an account, contract, lead, opportunity, or quote. Account is listed only if the account is in the activity's Related To field.	Yes
Role Hierarchy (Users.Roles.Role.RoleHierarchy)	When you use role hierarchy, this field represents the ID of the ancestor role of the activity owner or participant.	Yes
Source Id (Source_Id)	Represents the activity source. For activities that are Salesforce records, the value is either <code>core:tasks</code> or <code>core:events</code> . For captured activities (ones that aren't Salesforce records and appear only on the activity timeline), the value is <code>sig3:*</code>	No
Source Hash (Source_Hash)	For activities that are Salesforce records, the field is empty. For captured activities (ones that aren't Salesforce records and appear only on the activity timeline), the field represents the hash of the s3 file containing the activity.	No
User (Users.Person.Person_Name)	Represents the name of the activity owner or participant.	Yes
User Id (Users.Person.Person_Id)	Represents the ID of the activity owner or participant.	Yes
User Parent Role Name (Users.Roles.Role.ParentRole.UniqueName)	When you use role hierarchy, this field represents the role above the activity owner or participant.	Yes

Field Label (Field Name)	Description	Is a Multivalue Field
User Role Name (Users.Roles.Role_UniqueName)	When you use role hierarchy, this field represents the role of the activity owner or participant.	Yes

## SEE ALSO:

[Review the Activities Analytics Dashboard](#)

[Give Users Access to the Activities Analytics Dashboard](#)

[What Does Einstein Activity Capture Do?](#)

[Data Retention for Einstein Activity Capture and Inbox](#)

## Activity Metrics

If you use Einstein Activity Capture, Activity Metrics gives you the complete picture about your activity data. When you include Activity Metrics fields on list views, page layouts, reports, triggers, processes, and so forth, the data reflects activities that were added to Salesforce manually and by Einstein Activity Capture.

 **Note:** Some Activity Metrics fields are available to Sales Engagement users without Einstein Activity Capture.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

Available with Inbox in Sales Cloud, which is included in **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

Opportunity  
**Acme**

Close Date: 3/4/2019    Amount: \$20,000.00    Opportunity Owner: Admin User    Last Email Date: 3/18/2019 2:16 PM    Last Meeting Date: 3/19/2019 10:00 AM

Prospecting    Qualification    Needs Analysis    Value Propositi...    Id. Decision M...    Perception Ana...    Proposal/Price ...

Activity    Chatter    **Details**

Opportunity Owner	Admin User	Close Date	3/4/2019
Opportunity Name	Acme - 200 Widgets	Stage	Prospecting
Account Name	Acme	Probability (%)	30%
Type	Existing Business	Amount	\$20,000.00

Opportunities  
**Opportunity Pipeline**

3 items - Sorted by Opportunity Name - Filtered by all opportunities - Close Date - Updated a few seconds ago

	OPPORTUNITY NAME	ACCOUNT NA...	AMOUNT	CLOSE DATE	LAST ACTIVITY DATE	LAST 7 DAYS ACTIVITIES
1	Acme - 1,200 Widgets	Acme	\$140,000.00	2/4/2019	3/19/2019 10:00 AM	19
2	Acme - 200 Widgets	Acme	\$20,000.00	3/4/2019	3/19/2019 10:00 AM	3
3	Acme - 600 Widgets	Acme	\$70,000.00	5/6/2019	3/19/2019 10:00 AM	5

### Turn On Activity Metrics

After you turn on Activity Metrics, the Activity Metrics fields are available to use on list views, page layouts, reports, triggers, flows, and processes.

### Activity Metrics Fields

Activity Metrics fields show a summary of sales activities that were added to Salesforce manually and by Einstein Activity Capture. Most of the fields are available to Einstein Activity Capture users after Activity Metrics is turned on. A few fields are available only to Sales Engagement users, regardless of whether they use Einstein Activity Capture. Activity Metric fields are derived from your activity data, so create formula fields when using them on page layouts.

### Considerations for Using Activity Metrics

Before getting started with Activity Metrics, review requirements, limits, and other information about how it works.

### SEE ALSO:

[Analytics and Einstein Activity Capture](#)

[Einstein Activity Capture](#)

## Turn On Activity Metrics

After you turn on Activity Metrics, the Activity Metrics fields are available to use on list views, page layouts, reports, triggers, flows, and processes.

- Activity Metrics must be turned on in Lightning Experience, but Activity Metrics fields are available in Lightning Experience and Salesforce Classic.
  - If you have Activity 360 Reporting enabled, you can't turn off Activity Metrics. To turn it off, contact Salesforce Customer Support.
  - If you have at least one licensed Einstein Activity Capture user, all Salesforce users in your company can use the Activity Metrics fields. If you have only Standard Einstein Activity Capture users, you can't use Activity Metrics.
  - Some Activity Metrics fields are available to Sales Engagement users without turning on Activity Metrics.
1. From Setup, enter *Einstein Activity Capture* in the Quick Find box, and then select **Settings**.
  2. Click the **Settings** tab.
  3. Make sure that Einstein Activity Capture is on.
  4. Turn on Activity Metrics.

It can take up to a few days before Activity Metrics fields are ready to use. You receive a notification when the fields are ready. If you have a large amount of data, we recommend that you contact Salesforce Customer Support to turn on Activity Metrics without impacting performance.

To turn off Activity Metrics when Activity 360 Reporting is enabled, contact Salesforce Customer Support.

### SEE ALSO:

[Activity Metrics](#)

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

Available with Inbox in Sales Cloud, which is included in **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

### USER PERMISSIONS

To turn on Activity Metrics:

- Customize Application OR Modify All Data

## Activity Metrics Fields

Activity Metrics fields show a summary of sales activities that were added to Salesforce manually and by Einstein Activity Capture. Most of the fields are available to Einstein Activity Capture users after Activity Metrics is turned on. A few fields are available only to Sales Engagement users, regardless of whether they use Einstein Activity Capture. Activity Metric fields are derived from your activity data, so create formula fields when using them on page layouts.

Where to Use Activity Metrics Fields	Details
List views	Create or edit a list view. Select the Activity Metrics fields to include. When displayed on list views, Activity Metrics fields are indicated by  .
Record page layouts	Create a custom formula field that points to an Activity Metric field. Then add it to your page layout.
Reports	Create a report and add the Activity Metrics fields.
Flow Builder or Process Builder	Create a flow or process that includes Activity Metrics fields. Unlike most field updates, changes to activity metrics field values don't trigger flows or processes. Instead, activity metrics field values can be used to evaluate rule criteria for actions.  For example, when opportunities move to the Proposal or Price Quote stage, use the Inactive Days or Last Activity Date field to send an email alert to opportunity owners.

 **Note:** Unless otherwise noted, activities include events, emails, tasks, and calls.

Field	Description	Process Builder and Triggers	Formula Field
First Call Date	The date when the earliest call was made through Sales Dialer or a computer-telephony integration solution that logged the call to Salesforce.  This field is available only to Sales Engagement users.	<del>Object: ActivityMetric First Call Date</del>	
First Email Date	The date when the earliest email was sent or received.  This field is available only to Sales Engagement users.	<del>Object: ActivityMetric First Email Date</del>	

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

Available with Inbox in Sales Cloud, which is included in **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

Field	Description	Process Builder and Triggers	Formula Field
Inactive Days	The number of days since the most recent activity was completed  This field is derived from the Last Activity Date field.	<b>[object].ActivityMetric.LastActivityDateTime</b> - NOW  For example, create a trigger that notifies a user when there isn't any activity on an account for a certain amount of time.	Today () - LastActivityDate  This formula calculates the difference between the current date and the date of the last activity.
Last 7 Days Activities	The number of activities completed in the last 7 days	<b>[object].ActivityMetric.Rollup.TotalActivities7Days</b>	
Last 30 Days Activities	The number of activities completed in the last 30 days	<b>[object].ActivityMetric.Rollup.TotalActivities30Days</b>	
Last Activity Date	The date when the most recent activity was completed	<b>[object].ActivityMetric.LastActivityDateTime</b>	
Last Call Date	The date when the most recent call was made through Sales Dialer or Inbox	<b>[object].ActivityMetric.LastCallDateTime</b>	
Last Email Date	The date when the most recent email was sent or received	<b>[object].ActivityMetric.LastEmailDateTime</b>	
Last Email Received Date	The date when the most recent email was received	<b>[object].ActivityMetric.LastEmailReceivedDateTime</b>	
Last Email Sent Date	The date when the most recent email was sent	<b>[object].ActivityMetric.LastEmailSentDateTime</b>	
Last Event Date	The date when the most recent event was completed	<b>[object].ActivityMetric.LastEventDateTime</b>	
Last Task Date	The date when the last task was completed  For example, if a task is completed before the due date, the Last Task Date is different from the Due Date. Because tasks show up on the activity timeline according to their due date, inconsistencies can exist between the Last Task Date and what's on the activity timeline.	<b>[object].ActivityMetric.LastTaskDateTime</b>	
Next Activity Date	The date of the next scheduled task or event. Only open tasks within the next 30 days are included.	<b>[object].ActivityMetric.NextActivityDateTime</b>	
Today's Activities	Number of activities closed today	<b>[object].ActivityMetric.Rollup.TotalActivitiesDay</b>  For example, create a trigger that sends a daily email to Sales Managers with the	

Field	Description	Process Builder and Triggers	Formula Field
		total number of activities during that day.	

## SEE ALSO:

[Activity Metrics](#)[Build a Formula Field](#)[Customizing Reports in Salesforce Classic](#)[Create a Process](#)

## Considerations for Using Activity Metrics

Before getting started with Activity Metrics, review requirements, limits, and other information about how it works.

- Activity Metrics is supported in sandbox. However, because the data in a sandbox environment is limited, the activity metrics don't include existing activity data. Instead, the activity metrics include only activities that were created, updated, or deleted after you enabled Activity Metrics. To see activity metrics for new and existing activities, use a production org.
- You can use Activity Metrics fields with accounts, contacts, contracts, leads, and opportunities. Quotes aren't currently supported.
- On accounts, contacts, leads, opportunities, and person accounts, the Last Activity field doesn't include emails and events that were added by Einstein Activity Capture. We recommend that you remove the Last Activity field from the page layouts for those objects. Instead, use Activity Metrics to add the Last Activity Date field to page layouts.
- Activity Metrics fields are available in standard reports, but not in custom report types.
- Activity Metrics fields are updated in near real-time, but sometimes it takes longer.
- By default, Einstein Activity Capture identifies the domain used in the admin's email address as an internal domain. If your company uses more than one internal domain, [add all internal domains to the excluded list](#) before you turn on Activity Metrics.
- Activity Metrics calculations include activities that are 6 months and later, starting from the date when Activity Metrics was enabled. For entities with no activity in the last 6 months, Activity Metrics shows the last activity timestamp that's older than 6 months.
- If you don't use contracts with Einstein Activity Capture, the activity metrics fields for contracts are available but don't show data when used.
- Email and events that Einstein Activity Captures users *don't* share are counted with activity metrics data. Therefore, some users don't see activities on the activity timeline even though those activities are included in the activity metrics data.
- If you change the parent account for objects other than contacts and opportunities, the activity metrics data continues to reflect the original account. Therefore, the activity metrics data can be incorrect.
- If you use a private sharing model for contacts, the activity timeline on account and opportunity records sometimes shows emails for related contacts that users don't have access to. However, users still can't access the related contact records.
- For the Last Email Received Date and Last Email Sent Date fields, Activity Metrics calculates emails as sent or received using your company's internal domains. If an email isn't sent or received by an internal domain, Activity Metrics doesn't use it to calculate the Last Email Received Date and Last Email Sent Date fields.

### Prerequisites

- To use Activity Metrics, you must have less than 3 million total accounts, contacts, contracts, leads, and opportunities.
- You must have at least one licensed Einstein Activity Capture user. Then, all Salesforce users in your company can use the activity metrics fields. If you have only Standard Einstein Activity Capture users, you can't use Activity Metrics.
- If you plan to use Shared Activities, turn it on before you turn on Activity Metrics. This sequence helps keep the activity data consistent in Salesforce.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and for an extra cost in **Enterprise** Edition

Available with Inbox in Sales Cloud, which is included in **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

### Turning On and Off

- Although Activity Metrics must be turned on in Lightning Experience, Activity Metrics fields are available in Lightning Experience and Salesforce Classic.
- The procedure for turning off Activity Metrics differs depending on whether Activity 360 Reporting is enabled. To turn off Activity Metrics when Activity 360 Reporting is enabled, contact Salesforce Customer Support. If Activity 360 Reporting isn't enabled, turn off the Activity Metrics switch in Einstein Activity Capture Settings in Setup.

#### SEE ALSO:

[Activity Metrics](#)

## Salesforce Inbox

Inbox features increases sales reps' productivity on every email message, whether they're on the go or at their desk.

Available in: Lightning Experience

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Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance, and Unlimited** Editions

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All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

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An Inbox license unlocks Inbox features in the Outlook integration, Gmail integration, and Lightning Experience.

### [Set Up Inbox](#)

To set up Salesforce Inbox enable the application for desktop, select who can use Inbox, and configure Inbox features.

### [Use Inbox Features](#)

Increase productivity and work smarter and faster with Salesforce Inbox. See relevant Salesforce records along side your email and events, and relate email messages to Salesforce, keeping your teammates up-to-date with your communications. Access productivity features where ever you send email.

### [Legacy Salesforce Inbox](#)

Legacy versions of the Salesforce Inbox Outlook add-in and Chrome extension are retired. Inbox features are now available in the Salesforce add-in available in Microsoft AppSource Store and the Chrome Web Store. An Inbox license unlocks the Inbox features that you use today.

#### SEE ALSO:

[Outlook and Gmail Integration and Email Productivity Features](#)

## Set Up Inbox

To set up Salesforce Inbox enable the application for desktop, select who can use Inbox, and configure Inbox features.

Available in: Lightning Experience

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### USER PERMISSIONS

To set up Inbox

- **Customize Application and Modify All Data**

Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance,** and **Unlimited** Editions

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All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

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 **Tip:** After setting up Inbox, make sure that users get their preferred client apps from the various app stores.

#### [Salesforce Inbox System Requirements](#)

Before you set up your sales reps to use Inbox features, confirm that your email server, application, and accounts, meet the system requirements.

#### [Considerations for Setting Up Inbox](#)

Before setting up Inbox, consider how your sales reps use its features, which features you want to enable, and how Inbox interacts with other Salesforce configurations.

#### [Considerations for Tracking Emails Sent from Salesforce Inbox](#)

Before you enable email tracking for your sales reps, review the key considerations for how emails are tracked.

#### [Turn On Salesforce Inbox](#)

An administrator must enable Inbox features.

#### [Select Who Can Use Inbox Features](#)

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

#### [Enable and Configure Inbox Features](#)

Use the Salesforce Inbox page in Salesforce Setup as your guide to set up features such as email tracking.

#### [Verify Inbox Licenses](#)

Access to Salesforce Inbox is available with an Inbox license and the assignment of an Inbox permission set. Inbox is also available with Sales Engagement and Sales Cloud Einstein and their associated permission sets. To verify your Inbox licenses, view how many licenses are assigned and which users have each permission set.

#### SEE ALSO:

[Inbox Clients](#)

[Salesforce Inbox](#)

*External link:* [Customer Success Event Calendar](#)

## Salesforce Inbox System Requirements

Before you set up your sales reps to use Inbox features, confirm that your email server, application, and accounts, meet the system requirements.

Available in: Lightning Experience

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Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance,** and **Unlimited** Editions

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All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

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## Outlook Integration with Inbox

Users with an Inbox license have access to Inbox features in the Outlook integration. The system requirements are the same as for Outlook integration without Inbox features enabled.

## Gmail Integration with Inbox

Users with an Inbox license have access to Inbox features in the Gmail integration. The system requirements are the same as for the Gmail integration without Inbox features enabled.

## Inbox Features in Email from Lightning Experience Desktop

Users with an Inbox license have access to some Inbox productivity features, such as scheduling emails to send later, from Lightning Experience desktop. The system requirements are the same as for your email setup in Lightning Experience.

### SEE ALSO:

[Outlook Integration System Requirements](#)

[Gmail Integration System Requirements](#)

[Set Up the Integration with Outlook](#)

[Set Up the Integration with Gmail](#)

[Knowledge Article: What are the Salesforce IP Addresses and Domains to allow?](#)

[Implementation Guide: Salesforce Email Integration Security Guide](#)

## Considerations for Setting Up Inbox

Before setting up Inbox, consider how your sales reps use its features, which features you want to enable, and how Inbox interacts with other Salesforce configurations.

Available in: Lightning Experience

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Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance, and Unlimited Editions**

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All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

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- An Inbox license unlocks Inbox features in the Outlook integration, Gmail integration, and Lightning Experience.
- To use Salesforce Inbox, users must have Microsoft Exchange or Gmail accounts.
- Turning on Inbox features in Government Cloud and Government Cloud Plus organizations can send data outside the authorization boundary. Contact your Salesforce account executive for more details.
- Inbox is supported in sandbox orgs. If you're creating a sandbox from a production org that has Inbox enabled, you must enable Inbox in the sandbox org again. It's disabled in the sandbox org by default.
- To set up Inbox in Outlook or Gmail, first set up the Outlook or Gmail integration base experience. Then, extend the integrations to include Inbox features, and set up Inbox users.
- If Inbox users have issues with their connected account, such as emails not tracking or available times not updating, we recommend that users delete their account and connect it again.
- When creating a Salesforce record from an Inbox client, the validation rules, triggers, and required fields associated with the object from Salesforce are applied.

- Users see page layout updates made in Salesforce after logging out and back in to Inbox, or 24 hours after the change is made, whichever happens first.
- To log email activity automatically, enable Einstein Activity Capture along with Inbox. If you don't enable Einstein Activity Capture, sales reps can still add records and log emails directly to Salesforce from their Inbox client. You can select which users have access to the feature.
- Because Inbox and Einstein Activity Capture use the same data, data is stored in Amazon Web Services (AWS), regardless of Einstein Activity Capture being on. Automatically captured emails and activities are retained for 24 months by default. You can adjust the retention period to be as short as 30 days and as long as 5 years. After the selected time frame, all data is deleted from storage and isn't available in the Activity Time Line or dashboards. This policy doesn't apply to emails that are manually logged from Inbox to Salesforce, which are stored as EmailMessage records in Salesforce.
- Sending or receiving emails from addresses that contain non-Latin-based characters isn't supported in Inbox.

#### SEE ALSO:

[Set Up Inbox](#)

[Einstein Activity Capture](#)

[Data Retention for Einstein Activity Capture and Inbox](#)

[Guidelines for Setting Up the Outlook Integration](#)

[Guidelines for Setting Up the Gmail Integration](#)

[Email Address Internationalization \(EAI\)](#)

[Security Guide: Salesforce Email Integration Security Guide](#)

## Considerations for Tracking Emails Sent from Salesforce Inbox

Before you enable email tracking for your sales reps, review the key considerations for how emails are tracked.

Available in: Lightning Experience

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Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance, and Unlimited Editions**

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All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

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### General Email Tracking Considerations

- To restrict access to email tracking, from Setup, turn off email tracking in the Salesforce Inbox page.
- The sender's email and the recipient's email must allow for images with an email for email tracking to work correctly.
- An email set for tracking is tracked indefinitely.
- Tracking information is gathered in regular, timed cycles. If a recipient opens an email multiple times in one gathering cycle, only the first opening is tracked. If the recipient opens the email again in a different cycle, that opening is tracked as a separate opening.
- Email tracking can work unexpectedly if recipients open tracked emails in Apple Mail on devices running iOS 15, iPadOS 15, macOS Monterey, or watchOS 8.

### Email Tracking Push Notifications

To receive push notifications each time a recipient opens a tracked email, these settings are required.

- The Inbox app setting Tracked Email Was Open notification is on.

- The Smart Tools menu, Email Tracking option is on.

If the Inbox app is open, reps can find notifications about tracked emails in the Feed tab available in the More menu. Push notifications aren't sent if the rep is in the app. In the Feed, the read count for an email updates each time the recipient opens the email.

### Email Tracking Limitations

- The count for opened emails stops at 101 opens. Additional email opens aren't reflected in the summary.
- Email open tracking details indicate each time an email was opened, but don't indicate which user in the group opened the email.
- If an email is forwarded or opened from a Sent folder, the tracking information reflects the original opener of the email as the recipient, not the recipient of the forwarded email.
- When sales reps log a tracked email from the Outlook or Gmail integration with Inbox, the email tracking information appears in the activity timeline.
- If the recipient's email client or browser doesn't support TLS 1.2, the sender doesn't receive tracking information when the email is opened.

SEE ALSO:

[Email Considerations for Sales Engagement](#)

[Knowledge Article: Salesforce Inbox Email Tracking and Apple Privacy Policy](#)

### Turn On Salesforce Inbox

An administrator must enable Inbox features.

Available in: Lightning Experience

Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance,** and **Unlimited** Editions

All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

#### USER PERMISSIONS

To set up Inbox:

- Customize Application and Modify All Data

 **Note:** This setting is already enabled for users of the Starter edition.

1. From Setup, enter *Inbox* in the *Quick Find* box, then select **Setup Assistant** under Inbox.
2. Enable **Make Inbox Available to Users**.

Inbox features are now on. Be sure to assign the appropriate permission sets to users who need access to Inbox features, and complete any configuration to enable or disable features.

 **Note:** Inbox features are included in Sales Cloud, but some Einstein Activity Capture features aren't available in Professional and Enterprise Editions. Users with Professional and Enterprise Editions have access to Einstein Activity Capture Standard.

### Select Who Can Use Inbox Features

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

Available in: Lightning Experience

#### USER PERMISSIONS

To assign permission sets:

- Customize Application and Modify All Data

Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance,** and **Unlimited** Editions

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All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

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**!** **Important:** If you use Sales Cloud Einstein, Inbox permissions are included in the Sales Cloud Einstein permission set. If you use Sales Engagement, Inbox permissions are included in the Sales Engagement User permission set.

1. From Setup, enter *Permission Sets* in the Quick Find. Then, select **Permission Sets**.
2. Click one of the standard permission sets for Inbox:
  - **Inbox With Einstein Activity Capture** gives access to Einstein Activity Capture and the Activities dashboard along with Inbox features.
  - **Inbox Without Einstein Activity Capture** gives access to Inbox features, and manually logging emails and events without Einstein Activity Capture.
  - **Inbox Included** gives access to Inbox features, and manually logging emails and events without Einstein Activity Capture.
  - **Sales Cloud Included Bundle** gives access to Inbox features and other Sales Cloud Included features, such as Salesforce Meetings and Einstein Lead Scoring.
  - **Sales Engagement Basic** gives access to basic productivity features.

Inbox is included with Performance and Unlimited editions. If you have users who accessed Inbox through the Inbox, Sales Cloud Einstein, or Sales Engagement license before Summer '22, we recommend that you assign those users to the Inbox Included or Sales Cloud Included Bundle permission set, or a custom permission set that includes the Inbox permission. To make these assignments, assign the new permission set to your users before removing the old permission set. Beginning in Summer '22, you can't add users to the old Inbox, Sales Cloud Einstein, or Sales Engagement permission sets.

3. To assign the permission set to users, select **Manage Assignments**.

SEE ALSO:

[Verify Inbox Licenses](#)

[Select Who Can Use Sales Cloud Einstein](#)

[Assign Permission Sets for Sales Engagement Users](#)

## Enable and Configure Inbox Features

Use the Salesforce Inbox page in Salesforce Setup as your guide to set up features such as email tracking.

[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 along with 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 Email Tracking for Inbox Users](#)

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

## 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 along with 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 that Einstein Activity Capture is enabled.
2. 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 that 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.

## Disable Email Tracking for Inbox Users

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

Available in: Lightning Experience

Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance,** and **Unlimited** Editions

All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

 **Note:** An Inbox license isn't required for tracking emails sent from Lightning Experience.

### 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

Available with Sales Engagement, which is available for an extra cost in: **Enterprise, Performance,** and **Unlimited** Editions

### USER PERMISSIONS

To give users access to activity reports:

- Customize Application AND Modify All Data

### USER PERMISSIONS

To set up Inbox:

- Customize Application AND Modify All Data

To turn off email tracking for all Outlook and Gmail integrations with Inbox and use the Salesforce Inbox Setup Assistant page in Salesforce Setup. Turn off **Email Tracking**.

To turn off email tracking for only select Outlook and Gmail integration with Inbox users, use the Lightning App Builder. Remove the email tracking components from a custom email application pane and assign that pane to the appropriate user profiles.

SEE ALSO:

[Use and Filter Email Open Tracking](#)

[Customize the Email Application Pane for Outlook and Gmail](#)

## Verify Inbox Licenses

Access to Salesforce Inbox is available with an Inbox license and the assignment of an Inbox permission set. Inbox is also available with Sales Engagement and Sales Cloud Einstein and their associated permission sets. To verify your Inbox licenses, view how many licenses are assigned and which users have each permission set.

Available in: Lightning Experience

Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance,** and **Unlimited** Editions

All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

### USER PERMISSIONS

To view permission set licenses:

- View and Setup Configuration

1. From Setup, enter *Company Settings* in the Quick Find box, then select **Company Information**.
2. To view the total number of licenses and the number of licenses in use, find Inbox in the Permission Set Licenses related list.
 

Inbox features are also available with Sales Engagement and Sales Cloud Licenses. Check the list for those permissions if you don't have standalone Inbox licenses.

To verify which users are assigned to a permission set, from Setup, enter *Users* in the Quick Find, then select **Permission Sets**. Select a permission set and manage its assignments to see which users have the permission set assigned.

SEE ALSO:

[Select Who Can Use Inbox Features](#)

## Use Inbox Features

Increase productivity and work smarter and faster with Salesforce Inbox. See relevant Salesforce records along side your email and events, and relate email messages to Salesforce, keeping your teammates up-to-date with your communications. Access productivity features where ever you send email.

Available in: Lightning Experience

Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance,** and **Unlimited** Editions

All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

After Salesforce 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.

### [Inbox Clients](#)

Each user needs an Inbox client to access Inbox features. To support common Microsoft® and Google™ email platforms for desktop, we offer several client options. Get the client that's right for your environment.

### [Install the Inbox Clients](#)

To use Inbox, install the client that works with your platform and email account.

### [Use Inbox Features in Outlook and Gmail](#)

Increase productivity and work smarter and faster with Salesforce Inbox features in Microsoft Outlook® or Gmail™.

SEE ALSO:

[Considerations for Setting Up Inbox](#)

[Set Up Inbox](#)

## Inbox Clients

Each user needs an Inbox client to access Inbox features. To support common Microsoft® and Google™ email platforms for desktop, we offer several client options. Get the client that's right for your environment.

Available in: Lightning Experience

---

Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance, and Unlimited** Editions

---

All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

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Inbox Client	Supported Email Accounts
<a href="#">Outlook integration with Inbox</a> Works with Outlook on the web and Outlook 2016 and 2013 on Windows PC. Your Exchange administrator can <a href="#">push the app to Outlook</a> users from the Exchange Admin Center.	Microsoft Office 365 Microsoft Exchange 2019, 2016, or 2013 on-premises
<a href="#">Gmail integration with Inbox</a>	G Suite Gmail

SEE ALSO:

[Use Inbox Features](#)

## Install the Inbox Clients

To use Inbox, install the client that works with your platform and email account.

Available in: Lightning Experience

---

Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance, and Unlimited** Editions

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All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

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1. Download and install the Inbox client for your platform.
  - [iOS™ app](#)
  - [Android™ app](#)
  - [Salesforce add-in \(Outlook\)](#). See [Get Access to Salesforce in Microsoft Outlook](#) on page 306 to enabling the add-in in Outlook after it downloads. If you don't have access to the Microsoft AppSource store, ask your Exchange admin for help.
  - [Salesforce extension \(Gmail\)](#)
2. When prompted during installation, log in to Salesforce.

SEE ALSO:

[Inbox Clients](#)

[Use Inbox Features](#)

## Use Inbox Features in Outlook and Gmail

Increase productivity and work smarter and faster with Salesforce Inbox features in Microsoft Outlook® or Gmail™.

Available in: Lightning Experience

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Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance, and Unlimited** Editions

---

All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

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Inbox features are available in the Outlook and Gmail integrations. An Inbox license unlocks the Inbox-specific productivity tools in the integrations. See the Outlook and Gmail Integration on Desktop section of Salesforce Help for details about using Inbox features in the integrations.

### [Pin the Salesforce Panel in Outlook Desktop So It's Always Open](#)

In supported versions of Outlook, you can pin the Salesforce side panel so that it stays open as you move through emails.

### [Use Insert Availability to Optimize Meeting Scheduling](#)

Finally got a response from that prospect you've been hunting down for weeks? To avoid back and forth emails when trying to schedule a meeting, use the insert availability feature. Don't have time to email your availability? Give a teammate calendar access to schedule your meetings.

### [How Salesforce Records Are Matched to Emails and Events](#)

Salesforce records are matched to emails and events in the Outlook and Gmail integrations using specific criteria.

#### SEE ALSO:

[Use the Outlook and Gmail Integrations](#)

[Do More While Composing Emails in Outlook and Gmail](#)

## Pin the Salesforce Panel in Outlook Desktop So It's Always Open

In supported versions of Outlook, you can pin the Salesforce side panel so that it stays open as you move through emails.

Available in: Lightning Experience

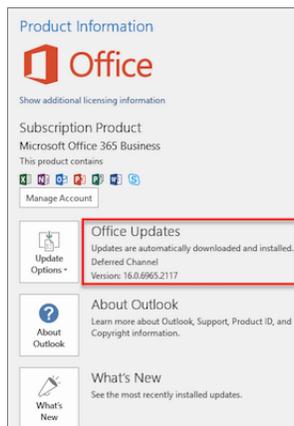
Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance, and Unlimited** Editions

All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

The pin is supported in the following versions and builds of Outlook:

- 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 new or legacy 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.

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**. 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 or the Outlook integration.

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

In the Outlook integration with or without Inbox, pin the panel open while reading an email. Pin the panel open again while composing an email to ensure that the panel is always open.

## Use Insert Availability to Optimize Meeting Scheduling

Finally got a response from that prospect you've been hunting down for weeks? To avoid back and forth emails when trying to schedule a meeting, use the insert availability feature. Don't have time to email your availability? Give a teammate calendar access to schedule your meetings.

Available in: Lightning Experience

Certain features are available with Sales Cloud and included in **Starter, Professional, Enterprise, Performance, and Unlimited Editions**

All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

1. Compose an email and add the recipients.
2. Tap **Smart Tools**, and then select **Availability**.

The screenshot displays the 'Insert Availability' tool. On the left, there is a form to create a meeting with fields for 'Meeting time' (set to 30 min), 'Location (max. 500 chars)', and 'Description'. Below the form, three attendees are listed: 'madeleine.salesforce@gma...Owner', 'madeleinemgill@gmail.com Primary', and 'madeleine.gill@salesforce.com'. The main area is a calendar grid showing busy times for these attendees from Sunday, May 21st to Saturday, May 27th. The time slots range from 9 am to 7 pm. A 'Jump to Today' button and a time zone dropdown (US/Pacific (GMT-7:00)) are at the top. Navigation buttons for '1 Day', '3 Day', and 'Week' are also present. An 'Add to Email' button is located at the bottom right of the calendar grid.

3. Select open times from your calendar or times that are open for all other attendees who have shared their calendars with you.
  - When selecting available times, the event owner's calendar is the primary calendar from their connected email account. Events from the connected account's primary calendar, not from the Salesforce calendar or additional calendars, are reflected on the calendar grid when selecting available times.
  - You're able to select any time slot that you're open even if others aren't free.
  - If you're using Inbox features in the Outlook and Gmail integrations, the selected time zone defaults to the time zone set on your computer. However, you can select a different one. The recipient receives the meeting times in the time zone that you select, and the meeting is scheduled in the selected time zone.

- To show or hide other calendars, select the checkboxes in the **Attendees** list.
- To see a coworker's availability, add the coworker to the **Attendee** list. To see other Inbox users' availability, each Inbox user must either share calendar access or be a part of the same Salesforce org.
- To schedule a meeting on behalf of someone else, change the meeting owner to another person on the meeting. The new meeting owner, who must be a member of your Salesforce org, controls the communications and changes to the invitation. For Microsoft accounts, you need access to a person's calendar to make them the owner of a meeting.
- Make sure that recipients are using up-to-date and modern email clients and browsers. If the recipient's email client or browser doesn't support TLS 1.2, they receive an error message when they select an available time in the email.

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

SEE ALSO:

[Edit Your Meeting and Availability Settings](#)

## How Salesforce Records Are Matched to Emails and Events

Salesforce records are matched to emails and events in the Outlook and Gmail integrations using specific criteria.

 **Note:** If Einstein Activity Capture is enabled, see [Guidelines for Capturing Emails and Events with Einstein Activity Capture](#) to learn how Einstein Activity Capture matches emails and events to Salesforce records.

Record	Matching Criteria for Outlook and Gmail Integrations with or Without Inbox
Users	<p>Returns user records that have a matching email address when the address also matches a contact or lead.</p> <p>If Enhanced Email is turned on and a user record is returned, the user is selected as the default people record for an email or event. If Enhanced Email is turned off, the matched contact is selected as the default, if one is returned.</p> <p>With Outlook Integration, if either Enhanced Email or Use Enhanced Email with Outlook (on the Outlook Integration and Lightning Sync page) is off, the matching order priority is Contact, then Lead, and then User. If both Enhanced Email and Use Enhanced Email with Outlook are on, the matching order priority is User, then Lead, and then Contact.</p> <p>To log all participants in an email, the sender's email address is included when using the Log Email on Send feature. If the sender is selected for logging, the email is logged to the user record, but an activity for the user isn't created.</p> <p>Other related records are returned according to the selected people record.</p>
Accounts	Returns any accounts associated with the matched contacts.
Opportunities	Returns any open opportunities associated to the matched contacts, the opportunity contact roles, or the matched contact's accounts. We list the first 20 opportunities returned by descending probability, then by ascending created

### EDITIONS

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

Outlook and Gmail integrations are available with Sales Cloud, Service Cloud, and Lightning Platform: **Essentials, Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Available with Inbox, which is available in **Professional, Enterprise, Performance,** and **Unlimited** Editions

**Record****Matching Criteria for Outlook and Gmail Integrations with or Without Inbox**

date. If you don't have access to the Probability field, we list the opportunities returned by created date only.

## Custom Objects

Returns custom objects that have a matching email address to one of the following:

- Contact lookup field
- Custom email address field
- Leads lookup field

If you have an Inbox license, custom objects are shown in the Related tab for the selected email. Without an Inbox license, use search to find the custom object to log an email to.

 **Note:** The BCC email field isn't used for matching.

In the Outlook and Gmail integrations with Inbox, the Salesforce admin defines which types of objects are included when returning related records. Using the Lightning App Builder, admins place the components for people, accounts, opportunities, cases, and other records on the Related tab. The components available on the Related tab in the email application pane determine the types of records shown as related to an email or event. For example, if a component isn't added to show cases, cases aren't shown in the Related tab as a matching Salesforce record.

## SEE ALSO:

[Guidelines for Using Emails with Einstein Activity Capture](#)

[Guidelines for Logging Email from Outlook and Gmail to Salesforce](#)

## Legacy Salesforce Inbox

Legacy versions of the Salesforce Inbox Outlook add-in and Chrome extension are retired. Inbox features are now available in the Salesforce add-in available in Microsoft AppSource Store and the Chrome Web Store. An Inbox license unlocks the Inbox features that you use today.

 **Tip:** [Compare features](#) on page 291 between the legacy versions of Inbox and the new versions available in Outlook and Gmail.

To continue using Inbox features in Outlook and Gmail, get the Salesforce add-in for Outlook or the Chrome Extension for Gmail. Be sure to uninstall the legacy version of the add-in or extension after installing the new version.

- [Get the Salesforce add-in for Outlook](#)
- [Get the Salesforce add-in for Gmail](#) (G Suite or Google Workspace email required)

## 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.

**Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

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.

### [Move from Lightning Sync to Einstein Activity Capture](#)

If you're on Lightning Sync and ready to make the move to Einstein Activity Capture, we're here to help. With the Lightning Sync migration assistant, the move is quick and easy. And in most cases, your sales reps don't notice the change. Learn what to do before, during, and after the migration process.

### [Lightning Sync System Requirements](#)

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

### [Lightning Sync User License Support](#)

You can set up Lightning Sync for users who are assigned to Sales Cloud, Service Cloud, and some Lightning Platform licenses.

### [Lightning Sync Security](#)

Lightning Sync is designed to sync contacts and events simply and securely between Salesforce and your Microsoft or Google email service. Learn about how that design impacts how data flow between systems and the configurations requirements you must meet to setup the product.

### [How Your Contacts Sync with Lightning Sync](#)

Learn how Lightning Sync handles your contacts or person accounts when you're set up to use Lightning Sync.

### [How Your Events Sync with Lightning Sync](#)

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

### [Manage Your Syncing Contacts](#)

If you're a Lightning Sync user, see how you can decide which contacts sync between your Microsoft or Google applications and Salesforce.

### [Manage Your Syncing Events](#)

If you're a Lightning Sync user, see how you can decide which events sync between your Microsoft or Google applications and Salesforce.

### [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.

## EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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

[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](#)

## Move from Lightning Sync to Einstein Activity Capture

If you're on Lightning Sync and ready to make the move to Einstein Activity Capture, we're here to help. With the Lightning Sync migration assistant, the move is quick and easy. And in most cases, your sales reps don't notice the change. Learn what to do before, during, and after the migration process.

[Why Move from Lightning Sync to Einstein Activity Capture?](#)

We know that migrating to a new product can be tons of work. But Einstein Activity Capture is the future of contact and event sync at Salesforce, so it's where you want to be! Einstein Activity Capture offers the same basic contact and event sync as Lightning Sync, plus even more productivity-boosting features. And with the Lightning Sync migration assistant, the transition is smooth and easy.

[How Does the Lightning Sync Migration Assistant Work?](#)

The migration assistant makes the move from Lightning Sync to Einstein Activity Capture easy for you and smooth for your sales teams. See what's moved automatically, and what benefits your users can expect.

[Can My Company Make the Move Using the Lightning Sync Migration Assistant?](#)

Before you start the migration process, make sure that your company meets the requirements for using the migration assistant. We also recommend that you familiarize yourself with the migration considerations, so that there are no surprises during your migration.

[Understand and Plan for Einstein Activity Capture User Permissions](#)

To complete your migration to Einstein Activity Capture, your users must be assigned an Einstein Activity Capture user permission. Until you do, your users' contacts and events continue syncing with Lightning Sync, and users don't get access to Einstein Activity Capture features. See which licenses include the user permission, and what users get with the different types.

[Kick Off Your Migration to Einstein Activity Capture](#)

Find the Lightning Sync migration assistant in Salesforce, and start the migration process. Don't worry, before we start moving your stuff, the assistant summarizes the major steps and runs a readiness check. Then you decide when you're ready to start the move.

[Get Acquainted with Einstein Activity Capture](#)

Now that you're set up for Einstein Activity Capture, you and your users can get acquainted with the product. See how it works and how you can troubleshoot issues. If you added Einstein Activity Capture features or settings to your users' migrated sync configurations, introduce those changes to users and some other settings that are new to them. You can also remind users how to manage which contacts and events sync.

### SEE ALSO:

[Compare Einstein Activity Capture and Lightning Sync Einstein Activity Capture](#)

### EDITIONS

The Lightning Sync migration assistant is available in: Lightning Experience

Einstein Activity Capture is available in: Lightning Experience and the Salesforce mobile app

The Lightning Sync migration assistant and Einstein Activity Capture are available in: **Professional, Enterprise, Performance, and Unlimited** Editions with Sales Cloud

## Why Move from Lightning Sync to Einstein Activity Capture?

We know that migrating to a new product can be tons of work. But Einstein Activity Capture is the future of contact and event sync at Salesforce, so it's where you want to be! Einstein Activity Capture offers the same basic contact and event sync as Lightning Sync, plus even more productivity-boosting features. And with the Lightning Sync migration assistant, the transition is smooth and easy.

### Einstein Activity Capture Benefits You and Your Sales Teams

Here's why Einstein Activity Capture is great for Salesforce admins, sales leaders, and sales reps. These benefits are included as part of [Einstein Activity Capture Standard](#).

- Einstein Activity Capture is where we're focusing our development efforts, so that's where you get the latest email and calendar integration features.
- Sales reps get near real-time event sync from their Outlook or Google calendars to Salesforce.
- Reps see relevant Outlook or Google emails in Salesforce automatically. Emails are shown on the activity timeline of Salesforce contacts, leads, accounts, contracts, opportunities, and quotes.
- Reps see relevant [Einstein Email Insights](#) in the activity timeline and on email detail pages in Salesforce. Email insights give sales reps critical sales context, making it easier for them to send the perfect response at the perfect time. Inbox users also see email insights from their email application.
- Admins get more control over what's added to Salesforce. Exclude emails or events from specific users or companies.
- Improved performance aids integration with other Salesforce products that you want to use, such as [Salesforce Scheduler](#).
- Admins get improved user interfaces for configurations and troubleshooting, which make it easier to manage large numbers of users.

### Supercharge Your Productivity with More Features

With a Sales Cloud Einstein, Inbox, or Sales Engagement add-on license, you and your teams get more out of Einstein Activity Capture. Einstein Activity Capture is also part of Sales Cloud Included permission set, which comes at no extra cost with Performance and Unlimited editions.

- Reps can see metrics about their event and email activity directly from record page layouts, list views, reports, triggers, processes, and more. Check out [Activity Metrics](#).
- Reps can find new business easily using [Recommended Connections](#). Reps see which colleagues have the strongest connection to a prospect directly from their contacts and leads.
- Admins can work with your sales leaders to [create custom email insights](#) for your sales reps.

SEE ALSO:

[Compare Einstein Activity Capture and Lightning Sync Einstein Activity Capture](#)

### How Does the Lightning Sync Migration Assistant Work?

The migration assistant makes the move from Lightning Sync to Einstein Activity Capture easy for you and smooth for your sales teams. See what's moved automatically, and what benefits your users can expect.

### How Does the Migration Assistant Streamline the Change Management Process?

The Lightning Sync migration assistant keeps you on task during your move to Einstein Activity Capture. The assistant walks you through three major migration steps.

- Checks that you're ready for the move.
- Prepares you to manage key product differences.
- Moves your connection settings and configurations from Lightning Sync to Einstein Activity Capture.

All you have to do is follow along, and later, obtain and assign the appropriate user permissions. It's that simple!

### Will the Move Interrupt My Sales Teams?

In most cases, admins don't have to announce migration to users until admins are ready to roll out Einstein Activity Capture features. That's because the assistant lets users avoid the multi-day first-time sync delay they experienced during their original Lightning Sync rollout. And there's no need to ask users to stop adding and updating contacts and events during the transition. Some users can notice a pause in contact and event sync while settings are moved, but no contact and event changes are lost during the transition. Users can continue working normally during the move, and the migration assistant makes sure that updates and new items are synced when the move is complete.

After migration is complete, users can follow the same steps to manage their syncing contacts and events as they did with Lightning Sync. Later, we remind you about those steps and more options available to them as new Einstein Activity Capture users.

### What Settings Does the Migration Assistant Move?

The migration assistant automatically moves all of these settings over to Einstein Activity Capture.

- Your connection method: Service account or OAuth 2.0 connection is moved to Einstein Activity Capture. If you want to use the Einstein Activity Capture User-Level Authentication connection method, you can after the migration process is complete.
- The data types your users sync: contacts, events, or both.
- The users and profiles assigned to each sync configuration.
- Sync direction, sync filters, and other settings found in sync configurations, such as event series sync, private event sync, and so on. There's one sync setting that we can't move, but we prepare you with next steps for those users who are affected.

 **Note:** To enable the Einstein Activity Capture User-Level Authentication connection method, complete the full migration process. After completing the migration, [turn off Lightning Sync](#), then [reset Einstein Activity Capture](#), and then enable Einstein Activity Capture.

### When Do My Users Get Einstein Activity Capture Features?

The migration assistant is focused on the migration phase that seamlessly transitions your users' Lightning Sync functionality to Einstein Activity Capture. To avoid introducing unexpected behavior for your users, the migration assistant leaves additional Einstein Activity Capture features turned off. But don't worry, you can turn on Einstein Activity Capture features when you're ready.

To complete the migration process, you must obtain and assign Einstein Activity Capture permissions to each of your syncing users. This documentation helps you with that part. We also tell you where to find your Einstein Activity Capture settings, call out features that are new to you, and point you to set up instructions.

### Do I Need to Recruit Any Colleagues to Help Me Make the Move?

With the migration assistant, Salesforce admins can move all Lightning Sync users to Einstein Activity Capture without any technical support from a Microsoft Exchange administrator.

After migration, admins can consider collaborating with a colleague in a sales operations role, or another sales leadership role, such as a sales manager. Sales leaders can help decide which additional Einstein Activity Capture features sales teams need and how best to configure those features.

SEE ALSO:

[Connect to Einstein Activity Capture with User-Level Authentication](#)

## Can My Company Make the Move Using the Lightning Sync Migration Assistant?

Before you start the migration process, make sure that your company meets the requirements for using the migration assistant. We also recommend that you familiarize yourself with the migration considerations, so that there are no surprises during your migration.

[Lightning Sync Migration Assistant Requirements](#)

To move from Lightning Sync to Einstein Activity Capture using the migration assistant, you must meet these requirements. In some cases, if you don't meet the requirements, you can't see the migration assistant in Setup.

[Considerations for Migrating to Einstein Activity Capture](#)

Consider these items before using the Lightning Sync migration assistant to move to Einstein Activity Capture.

## Lightning Sync Migration Assistant Requirements

To move from Lightning Sync to Einstein Activity Capture using the migration assistant, you must meet these requirements. In some cases, if you don't meet the requirements, you can't see the migration assistant in Setup.

Requirement	Specifications
Email and calendar application	Microsoft Exchange or Google.
Microsoft server	<ul style="list-style-type: none"> <li>• Microsoft Exchange 2019, 2016, or 2013</li> <li>• Microsoft Office 365 on Exchange Online</li> </ul> Both service account and OAuth 2.0 Lightning Sync connection methods are supported for migration.  <b>Note:</b> Einstein Activity Capture also offers a user-level connection that lets users connect their own account to Salesforce. If you plan to use a user-level connection, we recommend that you don't use the migration assistant.
Google server	Basic, Business, or Enterprise editions of Google Workspace.  <b>Note:</b> Einstein Activity Capture also offers a user-level connection that lets users connect their own account to Salesforce. If you plan to use a user-level connection, we recommend that you don't use the migration assistant.
Salesforce licenses	Einstein Activity Capture Standard is available to up to 100 users on the Standard Salesforce license with the purchase of Sales Cloud. To set up more than 100 users, one of the following add-on licenses is required.

Requirement	Specifications
	Users with Performance or Unlimited edition can access Einstein Activity Capture features without an add-on license. <ul style="list-style-type: none"> <li>• Inbox</li> <li>• Sales Engagement</li> <li>• Sales Cloud Einstein</li> <li>• Revenue Intelligence</li> </ul>
Salesforce editions	<ul style="list-style-type: none"> <li>• Professional</li> <li>• Enterprise</li> <li>• Performance</li> <li>• Unlimited</li> </ul>
Salesforce user interface	The migration assistant is available in Lightning Experience only.  Einstein Activity Capture is available for users who work from Lightning Experience or the Salesforce mobile app.

**SEE ALSO:**

- [Kick Off Your Migration to Einstein Activity Capture](#)
- [Considerations for Migrating to Einstein Activity Capture](#)
- [Understand and Plan for Einstein Activity Capture User Permissions](#)
- [How Does the Lightning Sync Migration Assistant Work?](#)
- [Why Move from Lightning Sync to Einstein Activity Capture?](#)

**Considerations for Migrating to Einstein Activity Capture**

Consider these items before using the Lightning Sync migration assistant to move to Einstein Activity Capture.

**User Permissions Are Required Before Migration Is Complete**

When users get access to Einstein Activity Capture depends on the order in which these steps are completed:

- The migration assistant moves your Lightning Sync settings and configurations to Einstein Activity Capture.
- An Einstein Activity Capture user permission is assigned to each user.

This documentation recommends that you assign user permissions to users last, after the migration assistant has moved your settings. At that point, you can see from your configurations who has the permission and who doesn't. See [Assign Einstein Activity Capture User Permissions](#).

You can complete your migration at your own pace. That is, you can move your settings and then pause while you prepare your user permissions or obtain licenses. Your users simply continue syncing using Lightning Sync until you complete both steps. While you can't return to your configurations from your Lightning Sync settings in Setup, you can update configurations from Einstein Activity Capture's pages.

There are a few cases in which you might want to consider a different order. See the next section.

## Considerations for Users With Performance and Unlimited Editions or a Sales Cloud Einstein, Inbox, Sales Engagement, or Revenue Intelligence License

An Einstein Activity Capture user permission is included with Performance and Unlimited editions and with Inbox, Sales Engagement, Revenue Intelligence, and Sales Cloud Einstein licenses. Unless you or another admin removed the permission from their user assignments, it's likely that the permission is already assigned to users who have access to these features. Users who already have the permission begin syncing with Einstein Activity Capture as soon as the migration assistant finishes moving their settings. Likewise, if you set up any Einstein Activity Capture features after your settings are moved, those features roll out to users with the Einstein Activity Capture permission as soon as you update and save their configurations.

If you think you have users assigned to permission sets from these editions or licenses, and it's important to know precisely when Einstein Activity Capture rolls out to each user, consider reordering your migration. First, take inventory of users' individual permissions, then decide which order you want to move settings and assign permissions. For example, you can roll out Einstein Activity Capture to users in different batches, based on who has the permission and who needs it. Or you can make sure all users have the user permission before you move settings. The specifics are up to you.

For a reminder about which user permissions are needed for Einstein Activity Capture and to see resources for verifying what permissions and licenses your users have today, see [Understand and Plan for Einstein Activity Capture User Permissions](#).

## Storage Differences

Lightning Sync stores your Microsoft contacts and event data in Salesforce only. Einstein Activity Capture stores your Microsoft contacts and event data in both Salesforce and the Salesforce Amazon Web Services (AWS) infrastructure. After you move your settings to Einstein Activity Capture, if you enable email features for Einstein Activity Capture, email data is stored in AWS only.

Customers in highly regulated industries may require additional information about how their business data is transferred and stored before they can proceed with Einstein Activity Capture. To ensure that it meets your requirements, review the [Einstein Activity Capture Security Guide](#).

With contact and event sync, your users don't notice the storage differences introduced by AWS. But if you enable Emails in Einstein Activity Capture, email data is stored in AWS only, and users notice behavior they haven't observed before.

- It isn't used to create Salesforce records.
- It isn't available in standard reporting. However, to see your activity data aggregated, you can use the [Activities dashboard](#) and [Activity Metrics fields](#).
- The [data retention](#) period determines how much email data is stored and for how long.

Your Lightning Sync settings at the time you kick off migration determine where data is stored. For example, if your Lightning Sync configurations are set to sync both contacts and events, both your contact and event data is stored on AWS and Salesforce.

A user's contact and event data starts to be stored in AWS as well as Salesforce after both of these migration steps are completed:

- The assistant has finished moving your settings to Einstein Activity Capture.
- You assign an Einstein Activity Capture user permission to the user.

After your migration, if you explicitly return to Einstein Activity Capture settings and turn on email-related features (and assign user permissions), your emails are stored in AWS too.

## Both Active and Inactive Configurations Are Moved

The migration assistant moves all of your configurations to Einstein Activity Capture. Inactive configurations remain inactive unless you decide to activate them later.

## Other Considerations

External users that use Lightning Sync aren't supported by Einstein Activity Capture.

There are a few other considerations for moving to Einstein Activity Capture, but the migration assistant helps you manage those items when the time is right. And we cover specifics about them later on in this documentation.

If you'd like, you can also review [Einstein Activity Capture Considerations](#).

### SEE ALSO:

- [Lightning Sync Migration Assistant Requirements](#)
- [Kick Off Your Migration to Einstein Activity Capture](#)
- [Understand and Plan for Einstein Activity Capture User Permissions](#)
- [How Does the Lightning Sync Migration Assistant Work?](#)
- [Why Move from Lightning Sync to Einstein Activity Capture?](#)

## Understand and Plan for Einstein Activity Capture User Permissions

To complete your migration to Einstein Activity Capture, your users must be assigned an Einstein Activity Capture user permission. Until you do, your users' contacts and events continue syncing with Lightning Sync, and users don't get access to Einstein Activity Capture features. See which licenses include the user permission, and what users get with the different types.

Einstein Activity Capture users are required to be assigned one of these user permissions:

- Use Einstein Activity Capture Standard
- Use Einstein Activity Capture

**!** **Important:** Depending on the Salesforce licenses that your users have today, some users have the user permission already. For others, you must assign it manually. In some cases, additional licenses must be purchased. These considerations could impact when your users get access to Einstein Activity Capture features and sync. See [Considerations for Migrating to Einstein Activity Capture](#).

This table shows which licenses include an Einstein Activity Capture user permission.

User permission	Which licenses have it
Use Einstein Activity Capture Standard	<p>Included with the purchase of Sales Cloud on the standard Salesforce license for up to 100 users.</p> <p>If you have more than 100 syncing users, you must purchase an add-on license for each additional user.</p> <p>This user permission gives users access to Einstein Activity Capture Standard features. See <a href="#">What is Einstein Activity Capture Standard?</a></p>
Use Einstein Activity Capture	<p>Included with Performance and Unlimited editions and these add-on licenses:</p> <ul style="list-style-type: none"> <li>• Inbox</li> <li>• Sales Engagement</li> <li>• Sales Cloud Einstein</li> <li>• Revenue Intelligence</li> </ul>

User permission	Which licenses have it
	Users with Performance and Unlimited editions or add-on licenses get additional features. See <a href="#">What is Einstein Activity Capture Standard?</a>

## Resources for Exploring Your Users' Licenses and Permission Assignments

- To see a list of all the licenses in your org (assigned and available) see [View Your Organization's User Licenses](#).
- To see a list of which users are assigned to a certain user permission, view your permission sets from Setup. Then open the permission set you're interested in, and click **Manage Assignments**.
- If you assigned your Lightning Sync users to configurations by profile instead of individually, you also must explore who is assigned to each user profile. See [View a Profile's Assigned Users](#).
- To see the licenses and perms assigned user-by-user, view the user's profile. From Setup, in the `Quick Find` box, enter `Users`, and then select **Users**. Click a users' profile to view it. To see what license a user has, check out the User License field. To see what user permissions they're assigned to, see the Permission Set Assignments related list. To see what add-on licenses they're assigned to, check out the Permission Set License Assignments related list.

## Kick Off Your Migration to Einstein Activity Capture

Find the Lightning Sync migration assistant in Salesforce, and start the migration process. Don't worry, before we start moving your stuff, the assistant summarizes the major steps and runs a readiness check. Then you decide when you're ready to start the move.

1. [Find the Migration Assistant in Your Lightning Sync Settings](#)  
Kick off the Lightning Sync migration assistant from your Lightning Sync Setup page and familiarize yourself with the migration process.
2. [Run the Migration Assistant Readiness Check](#)  
After you kick off migration process, the Lightning Sync migration assistant prompts you to run the readiness check. The readiness check ensures that any problematic configurations are addressed before you move your settings to Einstein Activity Capture. You can pause your migration to address potential issues before you proceed with the move.
3. [Move Your Settings from Lightning Sync to Einstein Activity Capture](#)  
After you get a clean report from the migration readiness check, move your Lightning Sync settings to Einstein Activity Capture. Accept the terms of service agreement and start your move. If you need more time to prepare, you can pause your migration and return to this step later. If you connect to Salesforce using Google, before you start your move, work with your Google admin to give the service account access to your Google users' data.
4. [Access Migrated Configurations and Add Einstein Activity Capture Features](#)  
Now that your settings are moved, get familiar with the productivity-boosting features available to your users through Einstein Activity Capture and decide what you want to set up. Or you can adjust your previous sync settings.
5. [Assign Einstein Activity Capture User Permissions](#)  
Before your migrating users can use Einstein Activity Capture, they must have an Einstein Activity Capture user permission.
6. [Turn Off Lightning Sync](#)  
After you migrate your Lightning Sync settings and assign users to Einstein Activity Capture, you're ready to turn off Lightning Sync.

### EDITIONS

The Lightning Sync migration assistant is available in: Lightning Experience

Einstein Activity Capture is available in: Lightning Experience and the Salesforce mobile app

The Lightning Sync migration assistant and Einstein Activity Capture are available in: **Professional, Enterprise, Performance, and Unlimited** Editions with Sales Cloud

## Find the Migration Assistant in Your Lightning Sync Settings

Kick off the Lightning Sync migration assistant from your Lightning Sync Setup page and familiarize yourself with the migration process.

1. From Setup, in the Quick Find box, enter `sync`. Then, if your company uses Microsoft Exchange, select **Outlook Integration and Sync**. Or, if your company uses Google, select **Gmail Integration and Sync**.
2. Under Migrate to Einstein Activity Capture, click **Explore Migration**. If don't meet the [requirements](#) on page 495, you can't see the migration assistant.

After you familiarize yourself with the migration process, run the readiness check. It makes sure that you're set up for a smooth migration.

## Run the Migration Assistant Readiness Check

After you kick off migration process, the Lightning Sync migration assistant prompts you to run the readiness check. The readiness check ensures that any problematic configurations are addressed before you move your settings to Einstein Activity Capture. You can pause your migration to address potential issues before you proceed with the move.

After you [find the migration assistant in your Lightning Sync settings](#), run the readiness check from the second page of the migration assistant.

Click **Run Readiness Check**.

### USER PERMISSIONS

To access the Lightning Sync migration assistant:

- Manage Users
- AND
- Manage Lightning Sync

### USER PERMISSIONS

To access the Lightning Sync migration assistant:

- Manage Users
- AND
- Manage Lightning Sync

**Migrate to Einstein Activity Capture**

Change can be hard. So we made it easier. Migration takes just a few steps. And users shouldn't notice a thing.

- 1. Run the readiness check.**  
We make sure that your Salesforce org is ready to move to Einstein Activity Capture.
- 2. Start the migration.**  
We move your Lightning Sync settings and configurations to Einstein Activity Capture.
- 3. Give users access to Einstein Activity Capture.**  
You can do this at your own pace, but until users have the Einstein Activity Capture permission, they still sync with Lightning Sync. Plus, users only see the enhancements that come with Einstein Activity Capture after you assign the permission.

[Video \(English Only\)](#) [Migration Guide](#)

**Run Readiness Check**

If the readiness check identifies any migration issues, the assistant tells you how to proceed. To get more help, these sections explain how to address migration issues.

After you sort out all listed issues, run the readiness check again until the migration assistant tells you that you're ready to continue to the next step. You can run the readiness check as many times as you want to.

## An Event Sync Setting Isn't Available with Einstein Activity Capture

Einstein Activity Capture doesn't support the Events users select option for the Specify Which Exchange Events Sync to Salesforce setting. If the readiness check reports this status, before moving your settings, we recommend that you learn how the assistant handles the unsupported setting and follow a few preparatory steps.

The Events users select option let users select each Outlook event that they want to sync to Salesforce using the Outlook Integration or Inbox side panel. See [Use the Outlook or Gmail Integration to Select Which Events Sync](#).

When you move your settings to Einstein Activity Capture, the unsupported setting can't be migrated for the affected configurations. Likewise, the assistant also sets the event sync direction for the configuration to Don't sync. Doing so prevents all Outlook events from syncing for users in this configuration. After you migrate your settings, you can either leave event sync turned off or prepare your users to sync all events, and then turn on event sync again. The assistant retains all of your other event sync settings saved on the configuration's data set.

To manage this issue, before moving your settings, we recommend following these steps.

1. Review your Lightning Sync configurations and note these details.
  - Record the names of the configurations that have the unsupported event sync option turned on. Look for the Specify Which Exchange Events Sync to Salesforce setting. The option that isn't supported is called Events users select.
  - Record the sync direction for each affected configuration if you don't think that you can remember what it was set to.
  - Optionally, you can record which users are assigned to each affected configuration. If you want to notify users before their events stop syncing, it can be helpful to record that list now. But you can locate affected users after migration too, as long as you recorded the names of the affected configurations.
2. Consider whether you want users to start syncing all events when you roll out Einstein Activity Capture. You can decide later, but it's a good idea to plan now so that you can notify users about the change (see next step). If you need help with deciding, ask your sales managers or someone in a sales operations role for their opinion.
3. Plan to communicate expected changes to users who are assigned to affected configurations.
  - Before you move your settings: Tell users in affected configurations when they can expect events to stop syncing. Also describe the new behavior for the Log Events button. See [Use the Outlook or Gmail Integration to Select Which Events Sync](#). Users notice these changes as soon as you tell the assistant to move your settings.
  - Before you re-add event sync to migrated configurations: Tell users how to [prepare their calendars to prevent events from syncing](#), and let them know how much time they have to do so before you turn on event sync. And users who have the Einstein Activity Capture permission have some [additional options for limiting what syncs](#).
4. If you decide to start syncing all events, after you move your settings to Einstein Activity Capture, re-add event sync to your affected configurations. This documentation tells you when the time comes to take that step.

### Too Many Users and Profiles in a Single Sync Configuration

The migration assistant can migrate up to 8,192 users and profiles per Lightning Sync configuration. If you're syncing more users and profiles in a single configuration, you must adjust those configurations before you can proceed to the next step in the migration assistant.

### Other Readiness Check Statuses

There are a few other readiness check statuses, but addressing those issues requires some help from Salesforce. Take note of the issue description, and [create a case for Salesforce Customer Support](#) describing the status that you saw. Support agents follow up to address the issue so that you can continue with your migration.

## Move Your Settings from Lightning Sync to Einstein Activity Capture

After you get a clean report from the migration readiness check, move your Lightning Sync settings to Einstein Activity Capture. Accept the terms of service agreement and start your move. If you need more time to prepare, you can pause your migration and return to this step later. If you connect to Salesforce using Google, before you start your move, work with your Google admin to give the service account access to your Google users' data.

Remember that your users can notice a pause in contact and event sync while we move settings, but users can continue working as usual. The migration assistant ensures that no contact or event changes are lost during the transition. Any items that were updated in the interim sync after your settings are moved. Depending on the complexity of your configurations, the move could take some time.

For a reminder of what specifically is moved, see [How Does the Lightning Sync Migration Assistant Work?](#)

There's no button for reverting to Lightning Sync after you've started moving your settings. But don't worry: If you're not feeling ready, you can cancel the assistant for now and return at any time.

1. If you connect to Salesforce using Google, Salesforce provides a service account for you. You don't need your Lightning Sync Google project or service account. Work with your Google admin to give the service account domain-wide authority and access to your users' Google data. When prompted, copy the service account client ID and comma-delimited list of the OAuth scopes from the assistant. Then, navigate to your Google Admin Console and add the service account client ID and OAuth scopes to your Google Workspace environment. See the [Google documentation about delegating domain-wide authority to a service account](#).

We recommend that you keep your Lightning Sync Google project and service account active during the migration process. After you turn off Lightning Sync, you can delete your Google project and service account.

2. Accept the terms of service agreement for Einstein Activity Capture when ready. Then click **Next**. If you connect to Salesforce using Microsoft, you see the terms of service agreement after the readiness check.
3. Review the migration summary on the Ready to Migrate page. When you're ready to move forward, click **Let's Do This!**

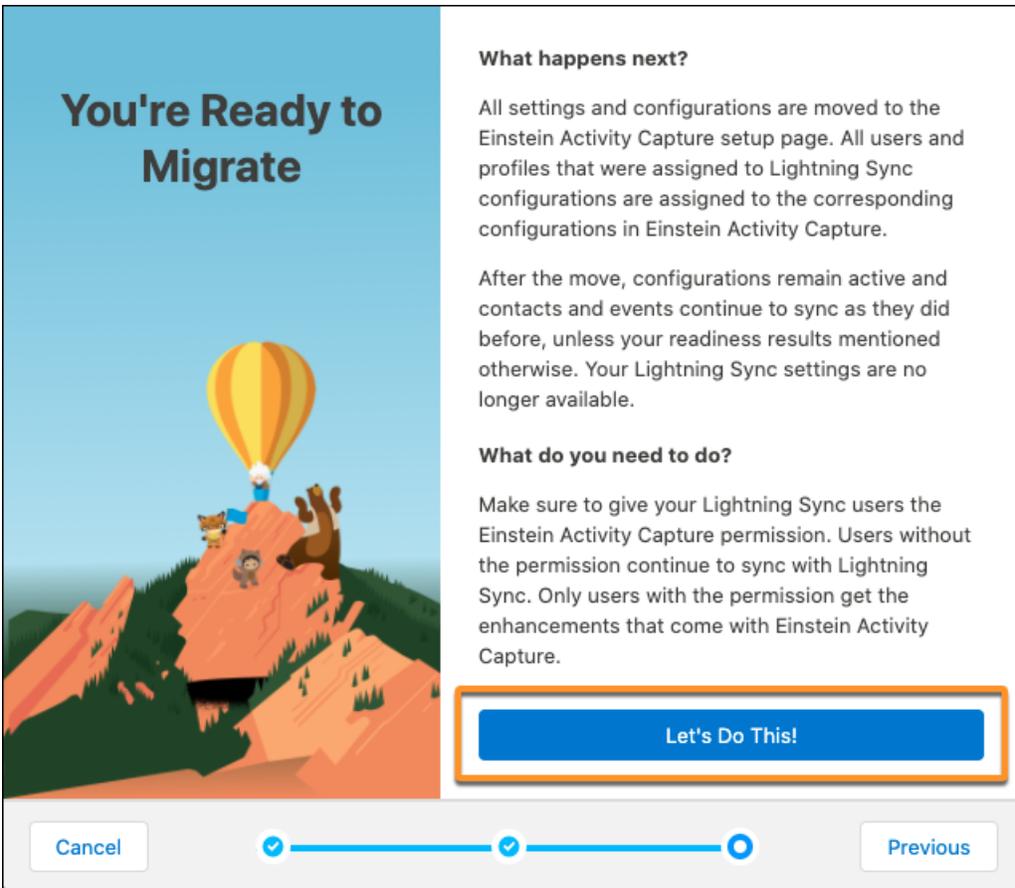
### USER PERMISSIONS

To access the Lightning Sync migration assistant:

- Manage Users

AND

Manage Lightning Sync



The assistant confirms that your move is underway. When you close the assistant, you return to your Lightning Sync settings in Setup. You can see your migration progress from both the Lightning Sync settings page and the Einstein Activity Capture settings page.

When migration is complete, your settings and configurations are moved the Einstein Activity Capture settings page, and syncing resumes for users. Next let's locate your configurations. When you're ready, you can update your previous Lightning Sync features or add Einstein Activity Capture features.

### Access Migrated Configurations and Add Einstein Activity Capture Features

Now that your settings are moved, get familiar with the productivity-boosting features available to your users through Einstein Activity Capture and decide what you want to set up. Or you can adjust your previous sync settings.

After your Lightning Sync settings are moved, you can access and update your migrated configurations from Einstein Activity Capture settings in Setup. To see certain features, your users must have the Einstein Activity Capture permission.

- Users can access features that were available with Lightning Sync without the Einstein Activity Capture permission. Users see those features as soon as you update and save configurations.
- To access Einstein Activity Capture features that weren't available in Lightning Sync, such as Einstein Email Insights, users must have the Einstein Activity Capture permission.

Get to Einstein Activity Capture settings by following the link from the Lightning Sync page in Setup. Or, from Setup, in the Quick Find box, enter *Einstein Activity Capture*, and then select **Settings**.

#### USER PERMISSIONS

To access the Lightning Sync migration assistant:

- Manage Users  
AND  
Manage Lightning Sync  
AND  
Customize Application

From the Settings page, click the Configurations tab. Your former Lightning Sync configurations, which are now Einstein Activity Capture configurations, are listed there. Open the configurations that you want to update. Then update settings or features. Here's a list of options.

1. Update any contact or event sync settings that you were using with Lightning Sync. These changes roll out to users as soon as you save the configuration. If the change affects your users' workflow, we recommend that you notify users before you save the configuration. For example, if event sync was turned off during migration because [a Lightning Sync setting wasn't supported](#), you can notify users to prepare their calendars, and then turn on sync for all events.
  - a. Open the configuration that you want to update.
  - b. Enable the Events option.
  - c. Select a sync direction for events. You can use the same sync direction that you used with Lightning Sync, or select a new one.
  - d. On the Advanced Sync Settings tab, consider setting Filter by End Date to TODAY. Doing so prevents all of users' Outlook events from the past 180 days from syncing to Salesforce. If you had any other event filters and sync settings on your Lightning Sync configuration, those items are already enabled on the migrated configuration. Adjust as-needed.
  - e. Save the configuration.
2. Automatically show emails on the activity timeline of relevant Salesforce contacts, leads, accounts, contracts, opportunities, and quotes. The Einstein Activity Capture permission is required to roll out this change to users.
  - a. Open the configuration that you want to update.
  - b. Enable the Email option.
  - c. Save the configuration.
3. Show relevant [Einstein Email Insights](#) in the activity timeline and on email detail pages in Salesforce. The Einstein Activity Capture permission is required to roll out this change to users.
4. [Exclude users from adding emails or events](#) from specific users or companies to Salesforce. The Einstein Activity Capture permission is required to roll out this change to users.
5. Set default [activity sharing](#). This Einstein Activity Capture permission is required to roll out this change to users.

When you're ready, finish your migration by assigning Einstein Activity Capture permissions to any users who still don't have it.

### Assign Einstein Activity Capture User Permissions

Before your migrating users can use Einstein Activity Capture, they must have an Einstein Activity Capture user permission.

-  **Important:** Depending on the Salesforce licenses that your users have today, some users have the user permission already. For others, you must assign it manually. In some cases, additional licenses must be purchased. These considerations could impact when your users get access to Einstein Activity Capture features and sync. See [Considerations for Migrating to Einstein Activity Capture](#).

Verify which users still need an Einstein Activity Capture permission assigned to them.

1. To see a complete list of users, go to the Configuration tab, and click **Download a list of Lightning Sync users**.

#### USER PERMISSIONS

To assign permission sets:

- Assign Permission Sets

To create permission sets:

- Manage Profiles and Permission Sets

**Einstein Activity Capture**

Let Einstein help keep your sales reps' email and calendar in sync with Salesforce. Then reps can get back to more important things, like selling. After reps connect their email and calendar accounts to Salesforce, email and events are automatically associated with related Salesforce records. Plus, contacts and events are synced between the connected accounts and Salesforce.

Summary **Configurations** Settings Excluded Addresses

% Lightning Sync Settings Migrated Turn Off Lightning Sync Download a list of Lightning Sync users

Your Lightning Sync settings were moved to Einstein Activity Capture. Make sure all users in the configuration have the Einstein Activity Capture permission. Users without the permission are still using Lightning Sync.

When you're done assigning the Einstein Activity Capture permission to users, you're ready to turn off Lightning Sync. [More info](#)

New Configuration

**Southwest**  
Sales team for south west territory  
Active Configuration ID: 063xx0000004CFAAU Edit

**PNW**  
Sales team for pacific north west territory  
Active Configuration ID: 063xx0000004Cc4AAE Edit

- To see users by configuration, open the migrated configuration, and check the User assignments.
  - Users who show [Lightning Sync] after their name must be assigned one of the Einstein Activity Capture user permissions. Those users are still using Lightning Sync.
  - Users who show [Einstein Activity Capture] after their name are already assigned one of the user permissions. These users are already syncing using Einstein Activity Capture, and they have access to Einstein Activity Capture features that were added to their configurations.

## Edit Sync Configuration

**GENERAL SETTINGS**
FIELD MAPPINGS
ADVANCED SYNC SETTINGS

> [Basic Information](#)

∨ User and Profile Assignments

We show you which users are still using Lightning Sync and need the Einstein Activity Capture permission.

**i** Einstein Activity Capture features and settings that aren't available with Lightning Sync only work when users have the Einstein Activity Capture permission.

Search:

Available		Selected
Jillian Western [Lightning Sync]	▶	Bryan Throne [Einstein Activity Capture]
Jose Gardon [Lightning Sync]		Marianne Schumacher [Lightning Sync]
Matthew Barnard [Einstein Activity Capture]	◀	Peter Wall [Einstein Activity Capture]
		Kris Foxwell [Lightning Sync]

3. Obtain the necessary [Einstein Activity Capture user permissions](#), if you haven't already.
4. Assign Einstein Activity Capture user permissions to the users who need it. See [Select Who Can Use Einstein Activity Capture](#).

## Turn Off Lightning Sync

After you migrate your Lightning Sync settings and assign users to Einstein Activity Capture, you're ready to turn off Lightning Sync.

1. From Setup, in the Quick Find box, enter *Einstein Activity Capture*, and then select **Settings**.
2. From the Configuration tab, click **Turn Off Lightning Sync**.  
Users without the Einstein Activity Capture permission are removed from configurations and their contacts and events stop syncing. To get those users syncing again, [give them the Einstein Activity Capture permission](#), and add them to a configuration.

## Get Acquainted with Einstein Activity Capture

Now that you're set up for Einstein Activity Capture, you and your users can get acquainted with the product. See how it works and how you can troubleshoot issues. If you added Einstein Activity Capture features or settings to your users' migrated sync configurations, introduce those changes to users and some other settings that are new to them. You can also remind users how to manage which contacts and events sync.

## Get to Know Einstein Activity Capture

Admins can check out these additional resources for more information about using the product.

- [Contacts and Einstein Activity Capture](#)
- [Events and Einstein Activity Capture](#)
- [Emails and Einstein Activity Capture](#)
- [Analytics and Einstein Activity Capture](#)
- [Troubleshoot Einstein Activity Capture Setup Issues](#)

## Tell Users About Features and Settings That You Added

During migration we suggested that you set up these Einstein Activity features and settings. If you added them to migrated configurations, share some resources about how they work and what users can expect.

- [Einstein Email Insights](#)
- [Exclude users from adding emails or events](#) (admin-controlled setting)
- [Activity sharing](#)

## Tell Users About Their Einstein Activity Capture Settings

Now that your users are on Einstein Activity Capture, users can manage their user experiences with these settings.

- [Exclude Emails and Events from Being Added to Salesforce](#) (user-controlled setting)
- [Control How Activities Added by Einstein Activity Capture Are Shared](#)
- [Set Up a Group for Sharing Activities](#)

## Remind Users About How to Manage Syncing Contacts or Events

Remember that users can continue to manage their syncing contacts and events in the same ways they did when they used Lightning Sync. For a reminder on how those methods work, see these Einstein Activity Capture topics.

### EDITIONS

The Lightning Sync migration assistant is available in: Lightning Experience

Einstein Activity Capture is available in: Lightning Experience and the Salesforce mobile app

The Lightning Sync migration assistant and Einstein Activity Capture are available in: **Professional, Enterprise, Performance, and Unlimited** Editions with Sales Cloud

### USER PERMISSIONS

To turn off Lightning Sync:

- [Customize Application](#)

- [Prepare to Sync Contacts with Einstein Activity Capture](#)
- [Prepare to Sync Events with Einstein Activity Capture](#)

## Lightning Sync System Requirements

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

**Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

### Lightning Sync for Google

The service account connection method is available for companies working from Google Workspace. Einstein Activity Capture supports the Basic, Business, and Enterprise editions of Google Workspace.

### Lightning Sync for Microsoft Exchange

The service account and OAuth 2.0 connection method are available for companies working from Microsoft Exchange.

Lightning Sync doesn't support hybrid Exchange server deployments that include both Exchange Online and on-premises Exchange servers. Syncing to even one of the servers in a hybrid deployment isn't supported.

#### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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

Connection method	Supported servers	Required Settings
Exchange service account	<ul style="list-style-type: none"> <li>• Office 365® Enterprise Editions with Exchange Online (Supported until Microsoft retires Basic Authentication for Exchange Online in your tenant.)</li> <li>• Exchange Server 2019</li> <li>• Exchange Server 2016</li> <li>• Exchange Server 2013 Service Pack 1</li> </ul>	<ul style="list-style-type: none"> <li>• Exchange Web Services (EWS) on an SSL connection</li> <li>• Exchange Autodiscover Service</li> <li>• Either Basic Authentication or NTLM on both your Exchange server and your Autodiscover server</li> <li>• Encryption protocol TLS 1.1 or later</li> </ul>
OAuth 2.0 for Exchange	Office 365® Enterprise Editions with Exchange Online. Lightning Sync only supports Office 365 tenants hosted on Microsoft Azure global infrastructure clouds. Azure national clouds aren't supported.	No additional settings are required to connect using OAuth 2.0

## Lightning Sync User License Support

You can set up Lightning Sync for users who are assigned to Sales Cloud, Service Cloud, and some Lightning Platform licenses.

**!** **Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

With the purchase of Sales Cloud, Service Cloud, or Lightning Platform, Lightning Sync supports users working from these standard licenses only:

- Salesforce
- Lightning Platform Salesforce Platform\*
- Lightning Platform - One App\*\*
- Lightning Platform App Subscription

\*Does not include Lightning Platform Starter or Lightning Platform Plus

\*\*Contact sync isn't supported for Lightning Sync customers working from the user license Lightning Platform - One App. Lightning Platform - One App doesn't include the Contacts object.

## Lightning Sync Security

Lightning Sync is designed to sync contacts and events simply and securely between Salesforce and your Microsoft or Google email service. Learn about how that design impacts how data flow between systems and the configurations requirements you must meet to setup the product.

**!** **Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

### [Lightning Sync Design and Data Flow](#)

Lightning Sync is designed to simplify the data flow between Salesforce and your email service.

### [Lightning Sync Connection Security](#)

Salesforce takes your data security seriously. Lightning Sync leverages standard Salesforce security measures when establishing a connection with your email service.

### [Security Measures Specific to Your Connection Method](#)

When you prepare your email service to connect with Salesforce, you create touchpoints in which the systems connect to sync data. Lightning Sync provides several methods for connecting systems. The security measures and other benefits that impact you depend on which connection method you select when you set up the product. See which connection methods are available to you based on the email service that you're using. Then learn about the security measures that impact that connection method.

### [Lightning Sync Transactions](#)

Review the transactions made by Lightning Sync in response to the work your users complete in Salesforce, and the order in which they occur.

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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 records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile app

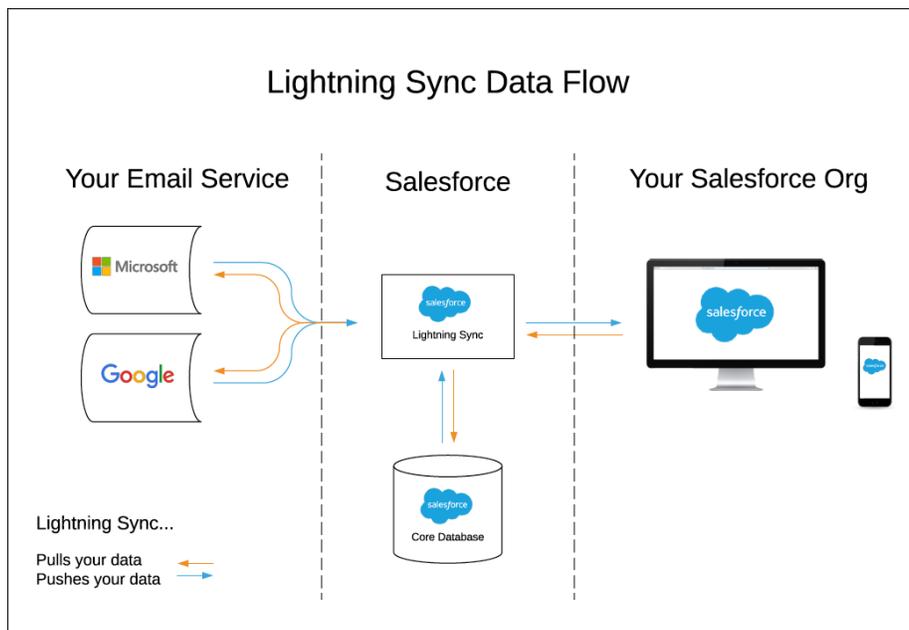
Available to set up from: Salesforce Classic and Lightning Experience

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

## Lightning Sync Design and Data Flow

Lightning Sync is designed to simplify the data flow between Salesforce and your email service.

Lightning Sync connects the core Salesforce database with your email server directly, with no email client required to maintain synchronization. This design simplifies the connection process and makes Lightning Sync a superior solution to Salesforce for Outlook, which requires a connection to individual Outlook user accounts. Calls to sync are made from an automated process on the Salesforce core stack to your email service, regardless of which data store has been updated. Users don't directly invoke communication between the systems. Likewise, the email service doesn't initiate communication.



With Lightning Sync, Data is stored in two locations only: users' individual email services and the Salesforce core database.

## Lightning Sync Connection Security

Salesforce takes your data security seriously. Lightning Sync leverages standard Salesforce security measures when establishing a connection with your email service.

Lightning Sync establishes a connection with your email service when you set up the product. When establishing a connection, Salesforce verifies the authenticity of your Microsoft or Google service with a security certificate that meets our certificate standards.

- Microsoft® Office 365® and Google G Suite automatically provide certificates that comply.
- Microsoft Exchange 2019, 2016, and 2013 customers are required to configure a certificate signed by one of the [Salesforce-Approved certificate authorities](#).

After the connection is established, Lightning Sync transfers contact and event data between servers. Individual users aren't required to log in to sync.

To avoid the possibility of interception, Salesforce uses TLS technology to protect transferred data. Upon authorization of each transaction, Salesforce requires the TLS configuration from the data received to meet Salesforce TLS security requirements before granting access.

SEE ALSO:

[Prepare Your Microsoft Exchange Server for Lightning Sync](#)

## Security Measures Specific to Your Connection Method

When you prepare your email service to connect with Salesforce, you create touchpoints in which the systems connect to sync data. Lightning Sync provides several methods for connecting systems. The security measures and other benefits that impact you depend on which connection method you select when you set up the product. See which connection methods are available to you based on the email service that you're using. Then learn about the security measures that impact that connection method.

### [Service Account Connection for Microsoft Users](#)

The service account connection method is available for Lightning Sync users working on Microsoft® Exchange 2019, 2016, and 2013 and on Microsoft Office 365® (Exchange Online). For Exchange Online customers, the service account connection method is no longer available starting October 1, 2022.

### [OAuth 2.0 Connection for Microsoft Users](#)

Connecting with OAuth 2.0 is available for Lightning Sync users working from Microsoft® Office 365®. To learn more, see the Lightning Sync system requirements.

### [Connection for Google G Suite Users](#)

The Google G Suite connection method is a combination of an OAuth 2.0 and a service account connection. This design is based on a method recommended by Google for connecting server to server.

SEE ALSO:

[Lightning Sync System Requirements](#)

## Service Account Connection for Microsoft Users

The service account connection method is available for Lightning Sync users working on Microsoft® Exchange 2019, 2016, and 2013 and on Microsoft Office 365® (Exchange Online). For Exchange Online customers, the service account connection method is no longer available starting October 1, 2022.

-  **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.
-  **Important:** Microsoft is retiring Basic Authentication for Exchange Online. When Microsoft blocks Basic Authentication in your Microsoft tenant, Lightning Sync can't sync contacts and events for customers who have selected service account as their Lightning Sync connection method. See [Lightning Sync Service Account Connection Method Availability for Customers on Microsoft Office 365](#).

Requirement	Why it's required	Benefit to you
Exchange admins must enable Exchange Web Services (EWS) over a connection using TLS 1.2 or higher.	EWS enabled over a TLS connection provides secure certificate authentication between Exchange and Salesforce. While EWS provides access to more objects in your email service, Lightning Sync can only read, write, and update contacts and events from users' email services. Lightning Sync isn't designed to discover or access other objects. <a href="#">Learn More</a>	Lightning Sync was designed following the Microsoft-established best practices for the application of EWS.  Lightning Sync uses the Exchange server's certificate to authenticate over a TLS connection, confirming that Exchange isn't interacting with a Salesforce impostor. You can control the scope by which Lightning Sync has access to your email service. To do so, limit which users are impersonated with your service account.

Requirement	Why it's required	Benefit to you
		<a href="#">Learn More</a>
Exchange admins must enable Auto Discovery.	Auto Discover lets Lightning Sync navigate to the Exchange service endpoint and identify individual users to sync. <a href="#">Learn More</a>	Lightning Sync can identify all users set to sync from the scope of your service account and your sync configuration in Salesforce. Auto Discovery lets Lightning Sync identify even addresses that are part of a different domain.  We limit Lightning Sync access to your email service by exploring only your primary email domain with Auto Discovery, which minimizes opportunities for data interception. You can include more domains to sync by adding them manually on the Lightning Sync Setup page in Salesforce. You can also control access by limiting which email service users are impersonated with your service account.  <a href="#">Learn More</a>
Exchange admins must enable Basic Authentication or NTLM on your email server and on your autodiscover server.	Lightning Sync identifies itself to your email services using the authentication protocol you chose to enable on your Exchange server. Lightning Sync authenticates on every connection request Salesforce makes to Exchange. If Basic and NTLM are enabled, Lightning Sync gives connection preference to Basic. If you must run other authentication methods on your server, those methods don't conflict with the Lightning Sync connection.  <a href="#">Learn More</a>	Authentication is encrypted over a TLS 1.2 or higher connection to provide security between endpoints on every request to Exchange. You can control the scope by which Lightning Sync has access to your email service. To do so, limit which email service users are impersonated with your service account.
Exchange admins must create a service account on your Exchange server to impersonate all syncing users.	Lightning Sync uses the service account to query for users' Salesforce_Sync folders and their primary calendars. The service account also queries create, update, and read server content that users already have access to.  <a href="#">Learn More</a>	This design lets contacts and events sync without requiring users to log in to their individual Microsoft accounts. Such a design avoids time-outs to users' login sessions, offering a more reliable connection between systems.  You can control the scope by which Lightning Sync has access to your email service. To do so, limit which email service users are impersonated with your service account.  <a href="#">Learn More</a>

Requirement	Why it's required	Benefit to you
Service Account credentials must be provided on the Outlook Integration and Sync page in Salesforce Setup.	Salesforce encrypts the service account password field using 128-bit master keys, using the Advanced Encryption Standard (AES) algorithm.	<p>Only Salesforce admins with the permissions to access the Outlook Integration and Sync page in Setup can see or change the service account address.</p> <p>As the password is typed, it's masked to prevent others from seeing it. The contents can't be copied and pasted elsewhere. You can't learn what the service account password is by revisiting the page later.</p>

## SEE ALSO:

[Lightning Sync System Requirements](#)

[See the Big Picture for Setting Up Lightning Sync for Microsoft® Exchange](#)

## OAuth 2.0 Connection for Microsoft Users

Connecting with OAuth 2.0 is available for Lightning Sync users working from Microsoft® Office 365®. To learn more, see the Lightning Sync system requirements.

Requirement	Why it's required	Benefit to you
Lightning Sync automatically requests its scope of access to all aspects of your users' Exchange mailbox and its resources.	While OAuth 2.0 provides access to more objects in your email service, Microsoft sets the breadth of that scope. Neither Salesforce nor Microsoft admins can adjust it. However, Lightning Sync can only read, write, and update contacts and events from users' email services. Lightning Sync isn't designed to discover or access other objects.	<p>Minimal setup is required to connect your applications using this method.</p> <p>This method provides access to users' Microsoft contacts and events without individual user authentication. As a result, sync between the applications remains consistent, and data is reliably updated in both systems without dependency on the user.</p>
Your company's Microsoft admin must provide access to Microsoft Office 365 from an account with global administrator permissions and accept Lightning Sync access to Microsoft.	After electing to connect using OAuth 2.0, you're redirected to <a href="https://login.microsoftonline.com">https://login.microsoftonline.com</a> to log in to your Office 365 email service. This site is the Azure Active Directory portal for customers on global infrastructure databases, also known as Global Services. From the portal, you provide your global administrator credentials and accept permission to let Lightning Sync access your Microsoft account. This design ensures that your global administrator credentials are never stored in Salesforce.	<p>Working hand-in-hand with the predetermined scope requirement, this method provides access to users' Microsoft contacts and events without individual user authentication. This benefit provides a sync experience with fewer interruptions. Several measures provide security for your data during transfer and within Salesforce.</p> <ul style="list-style-type: none"> <li>By design, your Azure tenant secrets are never in transmission with the OAuth 2.0 connection method. Instead,</li> </ul>

Requirement	Why it's required	Benefit to you
	<p>Next, you're redirected to the Outlook Integration and Sync page in Salesforce Setup, where your Microsoft Azure tenant ID is stored. Behind the scenes, Salesforce obtains an access token to your Microsoft account. The access token is required to gain read, update, create, or delete access to Microsoft contacts or events.</p> <p><a href="#">Learn More</a></p>	<p>Salesforce handles the management of both public and private keys.</p> <ul style="list-style-type: none"> <li>Your Microsoft tenant ID is encrypted at rest. It's visible only from the Outlook Integration and Sync page, so only Salesforce admins (or other users with Setup access) can see it. Plus, without signed Salesforce verification, interception of your tenant ID can't provide access to your Microsoft account.</li> <li>The access token is securely transferred from your Microsoft account to Salesforce over a TLS connection. The token is encrypted, and expires every hour. New tokens are always transferred over a TLS connection.</li> </ul> <p>Completing this process in no way provides impersonation rights to your global administrator account.</p>

## SEE ALSO:

[Lightning Sync System Requirements](#)

[See the Big Picture for Setting Up Lightning Sync for Microsoft® Exchange](#)

### Connection for Google G Suite Users

The Google G Suite connection method is a combination of an OAuth 2.0 and a service account connection. This design is based on a method recommended by Google for connecting server to server.

Requirement	Why it's required	Benefit to you
<p>Your Google admin must establish a service account for your G Suite account. To do so, Google admins generate a private key that includes access to your Google contacts and calendar API. A Salesforce admin then uploads the key to Salesforce.</p>	<p>After Salesforce admins upload the private key, the key provides Salesforce with an access token to your company's Google account. This access is required for read, update, create, or delete access to Google contacts or events.</p> <p>See Also:</p> <ul style="list-style-type: none"> <li><a href="#">Prepare Your Google Account for Lightning Sync</a></li> <li><a href="#">Prepare Salesforce for Lightning Sync</a></li> </ul>	<p>After they're uploaded, Google private keys are encrypted at rest. The private key signs the outbound sync requests sent from Salesforce. Requests can only be verified with the matching public key, possessed by your G Suite account.</p> <p>The generated access token is securely transferred from your Google account to Salesforce over a TLS connection. The token is encrypted. Every hour, the access token</p>

Requirement	Why it's required	Benefit to you
		expires and a new token is transferred, always over a TLS connection.

SEE ALSO:

[Lightning Sync System Requirements](#)

[See the Big Picture for Setting Up Lightning Sync for Google](#)

## Lightning Sync Transactions

Review the transactions made by Lightning Sync in response to the work your users complete in Salesforce, and the order in which they occur.

Lightning Sync initiates communication between Salesforce and your mail service asynchronously, so that the sync process doesn't slow down the users' intended Salesforce transaction.

- Changes made from Salesforce are queued for transmission to the email service.
- Changes made from the email service are retrieved by a periodic polling mechanism.

When contacts or events are synced to the opposite system, Lightning Sync impersonates the user who created or updated the original item. This behavior preserves accurate data on the items' last update.

For specific transaction details, review these scenarios.

### Sync Contacts from Salesforce to Email Service

1. User creates a contact.
2. Asynchronous job is enqueued to sync the transaction. Lightning Sync:
  - a. Determines which users who are configured for sync should sync the contact.
  - b. Checks whether contact meets sync filters.
  - c. Calls the email service to see whether the contact exists.
    - i. If it does exist, the contact is updated in the email service.
    - ii. If the contact doesn't exist, Lightning Sync calls the email service to create the contact.
  - d. Matching contacts are mapped between Salesforce and the email service for future syncing.

### Sync Events from Salesforce to Email Service

1. User creates an event.
2. Lightning Sync checks whether the user is set up to sync events.
3. Asynchronous job is enqueued to sync the transaction.
  - a. Lightning Sync checks whether the event meets sync filters.
  - b. Lightning Sync calls the email service to see whether the event exists.
    - i. If it does exist, the event is updated in the email service.
    - ii. If the event doesn't exist, Lightning Sync calls the email service to create the event.

- c. Matching events are mapped between Salesforce and the email service for future syncing.

### Sync Event Deletion from Salesforce to Email Service

1. User deletes an event.
2. Lightning Sync checks whether the record has been mapped to an event in the email service.
3. Lightning Sync checks whether the user is set up to have deleted events automatically removed from the other system.
4. If mapped to an event, asynchronous job is enqueued. Lightning Sync calls the mail service to delete the event.

### Sync Contact or Event Creation, Update, or Deletion from Email Service to Salesforce

Lightning Sync runs a job for all syncing users semi-continuously. The number of syncing users impacts job frequency.

1. Lightning Sync checks whether contacts or events were created or updated, or whether events were deleted from the email service.
  - a. Lightning Sync checks for matched items to update. If items are discovered to have no match, new records are created in Salesforce.
  - b. For deleted events, Lightning Sync checks whether users are set up to have deleted events automatically removed from the opposite system. If so, the event is deleted from Salesforce.

## How Your Contacts Sync with Lightning Sync

Learn how Lightning Sync handles your contacts or person accounts when you're set up to use Lightning Sync.

 **Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

#### Contact Sync

If you're set up for Lightning Sync, learn about how we match your Microsoft or Google contacts with Salesforce contacts and accounts. Also, learn what we do when we can't resolve a match, and how often items sync between applications.

#### Person Account Sync

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

#### Contact Field Sync

When you use Lightning Sync to sync contacts, fields from your Salesforce contacts are mapped to the same or similar fields in your external contacts list. Learn which fields sync and how fields are mapped between applications by default. Plus, see which Microsoft® Exchange field mappings Salesforce admins can customize.

#### Sync for Contacts Restored from the Recycle Bin

When you use Lightning Sync, contacts that are restored from the Recycle Bin automatically start syncing approximately 24 hours after restoration.

#### Contact Sync Filters

Lightning Sync contact sync filters let Salesforce admins limit which Salesforce contacts sync to users' Microsoft or Google applications. Learn about how sync filters work differently, depending on how they're set.

## Contact Sync

If you're set up for Lightning Sync, learn about how we match your Microsoft or Google contacts with Salesforce contacts and accounts. Also, learn what we do when we can't resolve a match, and how often items sync between applications.

### Which Contacts Sync and How Are They Matched?

When Lightning Sync runs its initial contact sync, it checks to see whether contacts with matching email addresses exist in both Salesforce and Microsoft or Google. If email addresses match, the two contacts are mapped to each other and begin to sync. If there isn't a match, Lightning Sync checks whether there's a match between the first and last name. If there's a match, then those contacts are mapped to sync. If there isn't a match, a new contact is created, and those two contacts are mapped to sync. If multiple contacts have matching email addresses, Lightning Sync chooses a contact that meets the matching criteria your Salesforce admin chose in your sync configuration. Matching criteria options include most recent activity, last updated, and oldest creation date. Those contacts are then mapped to sync.

Lightning Sync also checks for a match between a contact's company name in Microsoft or Google and an account's company name in Salesforce. If there's a match, the Salesforce account is related to the synced contact in Salesforce. If there isn't a match, the contact is added to the Unresolved Items list in Salesforce.

After the initial sync, Lightning Sync periodically checks whether there are new or updated contacts that require syncing. There are various factors that can impact sync wait time, such as:

- When many users are set up to start syncing around the same time
- When sync is pending for a significant number of contacts

For example, at a large company, an extended wait time is likely upon the first sync.

Lightning Sync can also sync Salesforce person accounts with Microsoft or Google contacts. Other than the explicitly stated differences, person accounts sync like contacts do. See [Person Account Sync](#).

To learn more about your sync direction and other sync settings, talk to your Salesforce admin. To familiarize yourself with features, see [Learn About Lightning Sync for Microsoft® Exchange Features](#) or [Learn About Lightning Sync for Google Features](#).

 **Note:** Contact sync doesn't support Outlook categories, so contacts labeled with a Salesforce\_Sync category that don't exist in a contacts subfolder of the same name don't sync with Salesforce. To avoid this issue, disable contact categories and select the Salesforce\_Sync folder for new contacts in Outlook. See [EAC - New Contacts Created In Outlook with 'Salesforce\\_Sync' Category Do Not Sync to Salesforce](#).

### Unresolved Contacts

Sometimes Lightning Sync can't match contacts or accounts automatically. When that happens, Lightning Sync lists partial matches on the Unresolved Items page in your Personal Settings.

To match unresolved contacts, decide whether you want to sync the Microsoft or Google contact to an existing Salesforce contact, or create a contact. Or you can update the Salesforce account with the information required to find a match, such as first name, last name, company name, or email address.

#### EDITIONS

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

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

If you're set up to sync both ways, we recommend creating relevant accounts in Salesforce before your admin rolls out contact sync. Otherwise, if you don't resolve unmatched Salesforce contacts before the next sync cycle, Lightning Sync removes the company from Microsoft or Google contacts.

SEE ALSO:

[Resolve Your Synced Contacts](#)

[Define Lightning Sync for Microsoft® Exchange Settings for Reps](#)

## 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 match and sync with your Google Contacts or 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.

To match person accounts and contacts, Lightning Sync compares the Salesforce `First Name` and `Last Name` fields to the Google or Outlook `Company` field. After person accounts are matched for sync, changes to `First Name`, `Last Name`, and `Company` don't sync between applications.

Other than the explicitly stated differences, person accounts sync like contacts do. See [Contact Sync](#).

## Contact Field Sync

When you use Lightning Sync to sync contacts, fields from your Salesforce contacts are mapped to the same or similar fields in your external contacts list. Learn which fields sync and how fields are mapped between applications by default. Plus, see which Microsoft® Exchange field mappings Salesforce admins can customize.

By default, Lightning Sync maps contact fields between Salesforce and your Microsoft Exchange or Google contacts list as indicated in the tables.

For customers who sync Salesforce with Exchange, admins can customize how some standard Salesforce fields map to some standard Exchange fields. Admins customize field mappings from sync configurations in Setup. Sometimes admins can't customize field mappings.

- Admins can't map custom Salesforce fields.
- Admins can't customize mappings for all standard Salesforce fields. For example, admins can't customize mappings for fields that Lightning Sync relies on for matching during the sync process. The table indicates which standard mappings can't be customized.

### 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

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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

## Default Contact Field Mappings for Microsoft Exchange

Salesforce Field	Exchange Field	Customizable Mapping?	Details
Account Name	Company (CompanyName)	No	
Assistant	Assistant name (AssistantName)	Yes	
Assist. Phone	Assistant phone (AssistantPhone)	Yes	
Birthdate	Birthday	Yes	
Department	Department	Yes	
Description	Notes (Body)	Yes	
Email	Email address (EmailAddress1)	No	
Fax	Business fax (BusinessFax)	Yes	
First Name	First name (FirstName)	No	
Home Phone	Home phone (HomePhone)	Yes	
Last Name	Last name (Surname)	No	
Mailing City	Business address City (BusinessAddressCity)	Yes	
Mailing Country	Business address Country/Region (BusinessAddressCountryOrRegion)	Yes	
Mailing State/Province	Business address State/Province (BusinessAddressState)	Yes	
Mailing Street	Business address Street (BusinessAddressStreet)	Yes	
Mailing Zip/Postal Code	Business address Zip/Postal code (BusinessAddressPostalCode)	Yes	
Mobile	Mobile phone (MobilePhone)	Yes	
Other City	Other address City (OtherAddressCity)	Yes	
Other Country	Other address Country/Region (OtherAddressCountryOrRegion)	Yes	
Other Phone	Other (Telephone)	Yes	In Outlook, this field is located under the Phone menu when you add more fields to the contact.
Other State/Province	Other address State/Province (OtherAddressState)	Yes	

Salesforce Field	Exchange Field	Customizable Mapping?	Details
Other Street	Other address Street (OtherAddressStreet)	Yes	
Other Zip/Postal Code	Other address Zip/Postal code (OtherAddressPostalCode)	Yes	
Phone	Business phone (BusinessPhone)	Yes	
Title	Job title (JobTitle)	Yes	

### Default Contact Field Mappings for Google

Salesforce Field	Google Field	Details
Account Name	Company (companyName)	
Assistant	Relationship (relation)	Standard label Assistant required on Google field Relationship.*
Birthdate	Birthday (birthday)	
Department	Department (orgDepartment)	
Email	Email (email)	When creating contacts in Google, the primary Email field must include the standard label Work for the contact to sync. Adding no label, other standard labels, or a custom label prevents the Google contact from syncing to Salesforce.
Fax	Phone (faxNumber)	Standard label Work Fax required on Google field Phone.*
First Name	First name (givenName)	
Home Phone	Phone (Phone)	Standard label Home required to sync field.*
Last Name	Last name (familyName)	
Mailing City	City (city)	Standard label Work required on the Google address.*
Mailing Country	Country/Region (country)	Standard label Work required on the Google address.*
Mailing State/Province	State (state)	Standard label Work required on the Google address.*
Mailing Street	Street address (street)	Standard label Work required on the Google address.*
Mailing Zip/Postal Code	ZIP code (postCode)	Standard label Work required on the Google address.*

Salesforce Field	Google Field	Details
Mobile	Phone (mobilePhoneNumber)	Standard label Mobile required Google field Phone.*
Other City	City (city)	Standard label Other required on the Google address.*
Other Country	Country/Region (Country)	Standard label Other required on the Google address.*
Other Phone	Phone (otherPhoneNumber)	Standard label Other required on Google Phone field.*
Other State/Province	State (otherState)	Other label required on the Google address.*
Other Street	Street address (otherStreet)	Standard label Other required on the Google address.*
Other Zip/Postal Code	ZIP code (otherPostCode)	Standard label Other required on the Google address.*
Phone	Phone (phone)	Standard label Work required on the Google Phone field.
Title	Job Title (title)	

\*Adding no label, a different standard label, or a custom label prevents these fields from syncing.

#### SEE ALSO:

[Define Lightning Sync for Microsoft® Exchange Settings for Reps](#)

[Define Lightning Sync for Google Settings for Reps](#)

[Contact Sync](#)

## Sync for Contacts Restored from the Recycle Bin

When you use Lightning Sync, contacts that are restored from the Recycle Bin automatically start syncing approximately 24 hours after restoration.

### Contact Sync Filters

Lightning Sync contact sync filters let Salesforce admins limit which Salesforce contacts sync to users' Microsoft or Google applications. Learn about how sync filters work differently, depending on how they're set.

Salesforce admins can define these contact filters on users' sync configuration data sets.

- Filter by record ownership
  - Selected Contacts: User's Records (1) - Select these options to sync only the contacts the user owns. You must select these options together.

#### EDITIONS

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

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

- All Contacts (2) - Select this option to sync all contacts the user has access to in Salesforce. Remember, a users' access to contacts is based on how you set up [object-level and record-level security](#) for contacts in your org.
- Filter by objects or fields (3)
- Sync contacts users follow in Chatter (4)

**Contact Filters** |= Required Information

Filter the contacts that users can sync from Salesforce to Exchange. Contact filters don't apply to contacts syncing from Exchange to Salesforce. To prevent certain Exchange contacts from syncing to Salesforce, users can keep them out of the "Salesforce\_Sync" folder in Exchange. [Learn more about contact sync filters.](#)

**Filter By Record Ownership**

Sync:  Selected Contacts  All Contacts 2

**Contacts**

User's Records 1

**Filter By Additional Objects and Fields (Optional)**

Object	Field	Operator	Value	
--None--	--None--	--None--		AND
--None--	--None--	--None--		AND
--None--	--None--	--None--		AND
--None--	--None--	--None--		AND
--None--	--None--	--None--		AND

[Add Row](#) [Remove Row](#) 3

**Other Contacts to Include**

Sync contacts users follow in Chatter 4

### Sync Contacts Users Follow in Chatter Setting

The Sync contacts users follow in Chatter setting works differently depending on the other filters selected in the configuration.

Selected record ownership setting	Additional object or field filters added?	User experience when the Sync contacts users follow in Chatter setting is selected
Selected Contacts: User's Records	No additional filters added.	Only the Salesforce contacts that users own plus the contacts that users follow in Chatter sync to Salesforce.
	Additional filters added.	Salesforce contacts that users own sync to Microsoft or Google, only if they meet the additional object or field filters.  Plus Salesforce contacts that users follow in Chatter sync to Microsoft or Google, even if the contacts don't meet the additional object or field filters.
All Contacts	No additional filters added.	All of the Salesforce contacts that users can access sync to Microsoft or Google, which includes contacts users follow in Chatter.

Selected record ownership setting	Additional object or field filters added?	User experience when the Sync contacts users follow in Chatter setting is selected
		Users see the same behavior whether the follow in Chatter setting is turned on or off.
	Additional filters added.	Salesforce contacts that users can access, including the contacts that they follow in Chatter, sync to Microsoft or Google only if they meet the additional object or field filters.

## SEE ALSO:

[Get Ready to Sync Contacts with Lightning Sync for Google](#)

[Get Ready to Sync Contacts with Lightning Sync for Microsoft® Exchange](#)

## How Your Events Sync with Lightning Sync

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

**!** **Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

### Event Sync

If you're set up for Lightning Sync, learn how we match your Microsoft or Google events with relevant Salesforce events, leads, and contacts. You can also learn what we do when we can't resolve a match, which events we sync, and how often.

### Events Automatically Related to Contacts or Leads

Lightning Sync can automatically relate Microsoft or Google events to relevant contacts or leads in Salesforce. Learn how that feature works, and how it interacts with other Salesforce options.

### Event Series Sync

If you use Lightning Sync, your Salesforce admin can set up your event series to sync between Microsoft calendars and Lightning Experience or the Salesforce mobile app. Admins set up event series sync from your sync configuration in Setup.

### Event Attendee Sync

If you sync events with Lightning Sync, invited contacts, leads, and other Salesforce users sync to Microsoft® Exchange or Google calendars. Events sync for the organizer and attendees according to the sync direction that Salesforce admins have set for the organizer.

### Event Delete

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

### Private Event Sync

When you select the Sync private events setting in your sales reps' Lightning Sync configurations, events that reps mark as private can sync between Salesforce and your Microsoft or Google calendar. When a private event syncs, it's marked as private in both calendar applications. However, some situations aren't supported for private events, such as attendee sync and automatically relating contacts or leads, that.

### [Event Field Sync](#)

When you use Lightning Sync to sync events, fields from your Salesforce events are mapped to the same or similar fields in your external calendar. Learn which fields sync and how fields are mapped between applications by default. Plus, see which Microsoft® Exchange field mappings Salesforce admins can customize.

### [Sync for Events Restored from the Recycle Bin](#)

When you're using Lightning Sync, learn which kinds of events restored from the Recycle Bin start syncing again.

## Event Sync

If you're set up for Lightning Sync, learn how we match your Microsoft or Google events with relevant Salesforce events, leads, and contacts. You can also learn what we do when we can't resolve a match, which events we sync, and how often.

### Which Events Sync and How Are They Matched?

Lightning Sync checks to see whether an event with the same subject, date, and start and end times exists in both Salesforce and Microsoft or Google. If events match, they're mapped to each other and begin to sync between applications. If no events match, a new event is created, and the two are mapped to sync between your external calendar.

Because recent events are the most relevant to you, after your admin initiates sync, Lightning Sync attempts to match only:

- New Salesforce events after you create them or existing Salesforce events after you update them.
- New and existing Microsoft or Google events that fall within the filter and sync settings set by your Salesforce admin.

Event sync can take up to a day or more. There are various factors that can impact sync wait time, such as:

- When many users are set up to start syncing around the same time
- When sync is pending for a significant number of events

For example, at a large company, an extended wait time is likely upon the first sync.

To learn about your sync direction, sync filters, and other settings, talk to your Salesforce admin. To familiarize yourself with features, see [Learn About Lightning Sync for Microsoft® Exchange Features](#) or [Learn About Lightning Sync for Google Features](#).

### Unresolved Events

After syncing, events that can't be related to a lead or contact are added to the Unresolved Items list in your Personal Settings in Salesforce. From there, you can choose which Salesforce leads or contacts to relate to the synced event. Or you can remove the event from the list and opt not to relate a record.

Most synced events are added to the Unresolved Items list, unless admins select the **Automatically Relate Events to Contacts or Leads** option from users' sync configurations. This option automatically relates a relevant lead or contact to synced events.

#### SEE ALSO:

- [Events Automatically Related to Contacts or Leads](#)
- [Resolve Your Synced Events](#)
- [Considerations for Syncing Events](#)
- [Define Lightning Sync for Microsoft® Exchange Settings for Reps](#)

#### EDITIONS

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

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

## Events Automatically Related to Contacts or Leads

Lightning Sync can automatically relate Microsoft or Google events to relevant contacts or leads in Salesforce. Learn how that feature works, and how it interacts with other Salesforce options.

To enable this feature, your Salesforce admin selects the Automatically relate events to Salesforce records option from your sync configuration in Setup.

Events are automatically related only under these conditions.

- When sales reps create their events in Microsoft or Google calendars.
- When the attendee's email address matches an email address found on a contact or lead in Salesforce.
- The first time the event syncs from your Microsoft or Google calendars to Salesforce. After the first time the event syncs to Salesforce, subsequent matching contacts or leads invited to the event aren't automatically related. Likewise, when a user removes an attendee from an event, the attendee's name is removed from the Attendees field, but the matching related records aren't automatically removed from the event. But you can remove or replace the related record manually.
- If Salesforce [sharing rules](#) permit the event organizer to see the matching contacts or leads in Salesforce. (Or in record-level access terms, only View access to the matching records is needed.)

For events with an organizer and more than one attendee, you can't always predict which specific attendee or attendees "wins" as the related record or records. Which records are related depend on these two factors.

- Whether your admin has turned on [shared activities](#) (the Allow Users to Relate Multiple Contacts to Tasks and Events option on the Activity Settings page in Setup)
- The kinds of records (users, contacts, or leads) you have in Salesforce that include email addresses that match the attendees' email addresses.

### Matching Attendees with Records when Shared Activities Is Off

When shared activities is off, Lightning Sync can relate only one Salesforce contact or lead to your event.

- For events with an organizer and only one attendee, Lightning Sync searches for a contact or lead that matches that single attendee and relates it to the event.
- For events with more attendees, Lightning Sync evaluates attendees for matches in a random order. Because only one related record is supported, the record that "wins" is dependent on the random order attendees are evaluated and the matching contact or lead you have in Salesforce.

Sometimes Lightning Sync finds multiple Salesforce records that match a single attendee's email address. In that case, here's how records are related when shared activities is off.

If the attendee's email address matches these Salesforce records	...Salesforce adds this record to the Attendee field	... and Lightning Sync automatically relates this record to the event.
A contact and a lead	The contact	The contact
A Salesforce user and either or both: <ul style="list-style-type: none"> <li>• A contact</li> <li>• A lead</li> </ul>	The Salesforce user	The contact. If no matching contact is found, the lead.

#### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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

## Matching Attendees with Records when Shared Activities Is On

When shared activities is on, Lightning Sync can relate up to 50 matching contacts or one matching lead to your event.

- For events with an organizer and only one attendee, Lightning Sync searches for a contact or lead that matches that single attendee and relates it to the event.
- For events with more attendees, Lightning Sync first searches all attendees for matching Salesforce contacts and relates the first 50 that are located. If no matching contacts are found, Lightning Sync searches all attendees for a matching Salesforce lead and relates the first one that's located.

Sometimes Lightning Sync finds multiple Salesforce records that match a single attendee's email address. In that case, here's how records are related when shared activities is on.

<b>If the attendee's email address matches these Salesforce records</b>	<b>...Salesforce adds this record to the Attendee field</b>	<b>... and Lightning Sync automatically relates this record to the event.</b>
A contact and a lead	The contact	The contact
A Salesforce user and either or both: <ul style="list-style-type: none"> <li>• A contact</li> <li>• A lead</li> </ul>	The Salesforce user	If a contact or lead has the same email address as a Salesforce user, and that user has already been added to the Attendees field, Lightning Sync doesn't relate the matching contact or lead to the event. Instead, Lightning Sync evaluates the rest of the event attendees, looking for up to 50 matching contacts, and relate them. If no contacts are found, Lightning Sync evaluates the rest of the event attendees, looking for one matching lead, and relates it.

## What to Expect When No Matching Contact or Lead Is Found

If no contacts or leads match your event attendee's email address, synced events are added to the Unresolved Items list in your Personal Settings in Salesforce. From there, you can choose which Salesforce contacts or leads to relate. Or you can remove the event from the list and opt not to relate a record.

### SEE ALSO:

[Considerations for Syncing Events](#)

[Resolve Your Synced Events](#)

[Define Lightning Sync for Microsoft® Exchange Settings for Reps](#)

[Enable Shared Activities](#)

## Event Series Sync

If you use Lightning Sync, your Salesforce admin can set up your event series to sync between Microsoft calendars and Lightning Experience or the Salesforce mobile app. Admins set up event series sync from your sync configuration in Setup.

Keep in mind that only Lightning Sync for Microsoft Exchange supports event series sync. Also, Lightning Sync doesn't sync recurring events (repeating events created in Salesforce Classic).

To learn more about these differences and how syncing event series can be different from syncing standalone events, see [Considerations for Syncing Events](#).

### SEE ALSO:

- [Considerations for Using Events and Calendars in Lightning Experience](#)
- [Define Lightning Sync for Microsoft® Exchange Settings for Reps](#)

## Event Attendee Sync

If you sync events with Lightning Sync, invited contacts, leads, and other Salesforce users sync to Microsoft® Exchange or Google calendars. Events sync for the organizer and attendees according to the sync direction that Salesforce admins have set for the organizer.

 **Note:** In Lightning Experience, people you invite to meetings are referred to as “attendees.” In Salesforce Classic, those same people are called “invitees.” Here, to keep things simple, we refer to attendees only, but the user experience is the same in both interfaces.

### When Do Attendees Sync?

Event attendee details automatically sync when:

- The event organizer is a Salesforce user in your org who's been set up to sync events with Lightning Sync.
- The event attendee is a Salesforce user, contact, or lead.

For example, when syncing organizers create events in Salesforce, organizers can invite attendees who are Salesforce users, contacts, or leads only, and the attendee field syncs. External attendees must be invited to events from organizers' external Microsoft or Google calendars. In these cases, the attendee field doesn't sync to Salesforce.

When syncing organizers create events from their external calendars, organizers can invite any attendee. If the attendee's email address must match the email address of a Salesforce user, contact, or lead, the event syncs to Salesforce. If the attendee matches multiple email addresses in Salesforce, Lightning Sync gives matching preference first to users, then to contacts, and last to leads. For example, if an attendee's email address matches both a contact and a lead, the matching contact syncs as the attendee. If the attendee's email address doesn't match a Salesforce user, contact, or lead, the attendee field doesn't sync to Salesforce.

Lightning Sync syncs up to 50 attendees per event.

### How Do Syncing Organizers and Attendees Experience Syncing Events?

In Salesforce, syncing organizers and attendees experience the same events differently.

- A syncing organizer can see and edit any event field. Any changes an organizer makes to the event are visible to attendees.

#### EDITIONS

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

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

#### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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

- An attendee can see event details but can edit only the event reminder or mark the event as private. If an attendee deletes the event from Salesforce calendar, the event is removed from the attendee's Salesforce calendar only. The attendee's name is saved on the event in both the `Created By` and `Last Updated By` fields.

Events sync for both the organizer and attendees according to the sync direction admins have set for the organizer. For this reason, it's best when admins set up event sync for whole teams, rather than individuals. Otherwise, when a nonsyncing organizer invites a syncing attendee, the attendee experiences some unexpected sync behavior. Sometimes, events don't sync at all. To learn more, review the attendees section in [Considerations for Syncing Events](#).

## How Are Event Invitations Sent to Attendees?

Event invitations and cancellations for syncing events are emailed to attendees from Exchange or Google, not from Salesforce.

Attendee responses to event invitations never sync from Salesforce to Exchange or Google. In Lightning Experience and the Salesforce mobile app, it isn't possible for attendees to respond to event invitations. To avoid overwriting attendance statuses in Salesforce Classic, [users can learn where to respond to event invitations based on their set sync directions](#).

### SEE ALSO:

- [Considerations for Syncing Events](#)
- [Considerations for Using Events and Calendars in Lightning Experience](#)
- [Define Lightning Sync for Microsoft® Exchange Settings for Reps](#)
- [Respond to Event Invitations from Your Microsoft or Google Calendar](#)

## Event Delete

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

If admins select the option Delete synced events on your sync configuration, when you delete a syncing event, its counterpart is removed from the other application. Moving an event from your primary calendar to a secondary calendar also removes the event's counterpart from the other application.

Deleting synced events works according to your sync direction.

-  **Example:** If you sync events from Microsoft to Salesforce only, when you delete an event from your Microsoft calendar, the event's counterpart is removed from Salesforce. However, because of your sync direction, the opposite isn't true: If you delete the event from Salesforce, the event's counterpart remains in your Microsoft calendar.

### SEE ALSO:

- [Define Lightning Sync for Microsoft® Exchange Settings for Reps](#)

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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

## Private Event Sync

When you select the Sync private events setting in your sales reps' Lightning Sync configurations, events that reps mark as private can sync between Salesforce and your Microsoft or Google calendar. When a private event syncs, it's marked as private in both calendar applications. However, some situations aren't supported for private events, such as attendee sync and automatically relating contacts or leads, that.

### When Do Private Events Sync?

After you turn on the setting, a rep's private events sync according to the rep's sync direction.

- If the private event is new, the event syncs after a rep creates the event.
- If a rep created the private event before you turned on the setting, the event syncs after a rep updates the event.

Only an admin can see whether private events are set up to sync for reps or which sync direction is set. It's important that you explain the sync setup to reps so that they can prepare their calendars accordingly—and keep Great Aunt Alberta's 95th birthday party out of Salesforce.

If you turn off the Sync private events setting, private events are no longer queued for sync. A version of each private event that was previously synced remains in both Salesforce and reps' external calendars until reps delete one or both. If reps notice that a few private events sync one last time, those changes were likely queued for sync before you turned off the setting.

### Who Sees Reps' Private Events When They Sync?

The amount of event information that rep's colleagues see depends on which application events are viewed from.

- In Salesforce, a private event's start and end times are visible to colleagues, but event details are hidden. All private event details are visible to Salesforce admins who can view, edit, and report on events. Reps can choose to share more private event details with their colleagues by changing their calendar sharing in their Personal Settings.
- In external calendars, those calendar applications determine how private event details are shared with colleagues and supervisors. Refer to the documentation for your calendar application.

### How Does Lightning Sync Handle Attendees and Related Records on Private Events?

Salesforce doesn't support adding attendees (Lightning Experience and Salesforce app), invitees (Salesforce Classic), or related records to private events. Therefore, attendees added to private events from Microsoft or Google calendars don't sync to Salesforce. Likewise, Salesforce users who are invited to private events from Microsoft or Google calendars can't see the event on their Salesforce calendars. And records can't be automatically related to events marked as private, even if the Automatically relate events to Salesforce records setting is selected in a rep's sync configuration.

Here's how private events sync is managed when reps set or change the private setting on events.

Rep's action	From this application	Sync outcome	Sync back outcome (occurs for reps set to sync both ways)
Rep creates a private event.	Exchange or Google Calendar	The event syncs to Salesforce as private. If the event includes attendees, the attendee field doesn't sync	If the event is updated in Salesforce, when it syncs back to Exchange or Google, attendees remain on the

#### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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

Rep's action	From this application	Sync outcome	Sync back outcome (occurs for reps set to sync both ways)
		to Salesforce. The event doesn't sync to Salesforce for any of the meeting attendees who are Salesforce users.	Exchange or Google version of the event.
	Salesforce	The event syncs to Exchange or Google as private.	No unexpected outcome.
Rep converts a syncing, private event to public.	Exchange or Google Calendar	<p>When the event syncs to Salesforce, the event is marked as public.</p> <p>If the event includes attendees, the attendee field syncs to Salesforce. The event syncs to Salesforce for any of the meeting attendees who are Salesforce users.</p>	No unexpected outcome.
	Salesforce	<p>When the event syncs to Exchange, Einstein Activity Capture doesn't convert the event to public. The event is updated in Salesforce and remains private in Exchange.</p> <p>When the event syncs to Google, the event is marked as public. If the rep adds attendees after converting the event to public, the attendees field syncs to Google.</p>	No unexpected outcome.
Rep converts a syncing, public event to private.	Exchange or Google Calendar	<ul style="list-style-type: none"> <li>• If the Exchange or Google version of the event includes no attendees or related records, the event syncs to Salesforce as private.</li> <li>• If the Exchange or Google version of the event includes attendees or related records, Einstein Activity Capture doesn't convert the event to private in Salesforce. The event remains as public, and attendees and related records are retained.</li> </ul>	If the event remains public in Salesforce and the Exchange or Google version of the event is private, Einstein Activity Capture immediately syncs the event back as private.

Rep's action	From this application	Sync outcome	Sync back outcome (occurs for reps set to sync both ways)
	Salesforce	<p>When the event syncs to Exchange, Einstein Activity Capture doesn't convert the event to private. The event is updated in Salesforce and remains public in Exchange.</p> <p>When the event syncs to Google:</p> <ul style="list-style-type: none"> <li>• If the Salesforce version of the event includes no attendees or related records, the event syncs to Google as private.</li> <li>• If the Salesforce version of the event includes attendees or related records, the rep is required to remove both before the event can be converted to private. Then the event can be saved and syncs to Google as private.</li> </ul> <p>Any previously syncing attendees remain on the Google version of the event.</p>	If any future updates are made to the attendees field from Google, the changes don't sync to Salesforce as long as the event remains private.
Rep converts one occurrence of a syncing, public event series to private.	Salesforce	<p>Microsoft doesn't allow one occurrence of a series to have a different privacy setting than the rest of the series. When Einstein Activity Capture queues the event for sync, it reverts the occurrence back to public in Salesforce because the change can't sync to the Microsoft calendar.</p> <p>If reps removed any attendees or related records before saving the record in Salesforce, those items are restored.</p>	No unexpected outcome.
Rep converts one occurrence of a syncing, private event series to public.	Salesforce	Microsoft doesn't allow one occurrence of a series to have a different privacy setting than the	No unexpected outcome.

Rep's action	From this application	Sync outcome	Sync back outcome (occurs for reps set to sync both ways)
		rest of the series. When Einstein Activity Capture queues the event for sync, it reverts the occurrence back to private in Salesforce because the change can't sync to the Microsoft calendar.	

Reps can convert one occurrence of a syncing event series if the event series was created in an Exchange Calendar, Lightning Experience, or the Salesforce app. Event series sync isn't supported for Google Calendar or Salesforce Classic.

#### SEE ALSO:

[Define Lightning Sync for Microsoft® Exchange Settings for Reps](#)

[What's the difference between private items in both Salesforce for Outlook \(Retiring\) and Microsoft® Outlook®? Calendar Sharing](#)

## Event Field Sync

When you use Lightning Sync to sync events, fields from your Salesforce events are mapped to the same or similar fields in your external calendar. Learn which fields sync and how fields are mapped between applications by default. Plus, see which Microsoft® Exchange field mappings Salesforce admins can customize.

For customers who sync Salesforce with Exchange, admins can customize how some standard Salesforce fields map to some standard Exchange fields. Admins customize field mappings from sync configurations in Setup. Sometimes admins can't customize field mappings.

- Admins can't map custom Salesforce fields.
- Admins can't customize mappings for all standard Salesforce fields. For example, admins can't customize mappings for fields that Lightning Sync relies on for matching during the sync process. The table indicates which mappings can't be customized.

### Default Event Field Mappings for Microsoft Exchange

Salesforce Field	Exchange Field	Customizable Mapping?	Details
All-Day Event	All Day (IsAllDayEvent)	No	All-day events sync to Salesforce as 24-hour events.
Attendees	No field label	No	The Salesforce Attendees field must be added to the event page layout to see the

#### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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

Salesforce Field	Exchange Field	Customizable Mapping?	Details
			<p>attendees list in Salesforce.</p> <p>To understand how the attendees field and attendee responses sync, see <a href="#">Event Attendee Sync</a>.</p> <p>In Outlook, this field is shown as an icon, with a text field to add attendees and mark them as required or optional. The API labels for the Exchange fields are RequiredAttendees AND OptionalAttendees. Salesforce syncs both Exchange fields with Attendees.</p>
Description	Notes (Body)	Yes	
Duration	Duration	No	
End	No field label	No	In Outlook, this field is shown as an icon, with the options to select an end time or day. The API label for the Exchange field is End.
Location	No field label	Yes	In Outlook, this field is shown as an icon, with a text field to add a location. The API label for the Exchange field is Location.
Assigned To	Organizer (Organizer)	No	
Private	Private (Sensitivity)	No	The Salesforce field Private syncs with the Exchange field Sensitivity, and Private is one of the Exchange field options. Only Private syncs with Salesforce. Only Private shows in Outlook.
Reminder Date/Time	Remind Me (ReminderMinutesBeforeStart)	Yes	In Outlook, this field is shown as part of the Remind Me field.
Reminder Set	Remind Me (IsReminderSet)	Yes	In Outlook, this field is shown as part of the Remind Me field.
Repeat	Repeat (AppointmentType)	No	Repeating event details sync only if you enable Lightning Experience, add the Repeat field to the Salesforce event page

Salesforce Field	Exchange Field	Customizable Mapping?	Details
			<p>layout, and enable Event series sync on users' Lightning Sync configurations.</p> <p>In Outlook, this field is shown as Repeat on events from the edit page, and Series from the saved event.</p>
Show Time As	Show as (LegacyFreeBusyStatus)	Yes	In Outlook, calendar availability is shown as Free, Tentative, Busy, Away, Out of office, or Working elsewhere. Outlook Tentative, Busy, and Away sync as Busy in Salesforce. Outlook Free and Working elsewhere sync as Salesforce Free, and Outlook Out of office syncs as Salesforce Out of office.
Start OR Time	No field label	No	<p>The Salesforce field Time syncs with the Exchange field Start only if multiday events are enabled in Salesforce. Otherwise, the Salesforce field Start syncs with the Exchange field Start.</p> <p>In Outlook, this field is shown as an icon, with the options to select a start time or day. The API label for the Exchange field is Start.</p>
Subject	No field label	No	In Outlook, this field is shown as an icon, with a text field to add an event title. The API label for the Exchange field is Subject.
Time Zone	Not shown	No	Outlook events don't show this field. The API label for the Exchange field is StartTimeZone.

### Default Event Field Mappings for Google

Salesforce Field	Google Field	Details
All-Day Event	All Day (isAllDay)	

Salesforce Field	Google Field	Details
Attendees	Guests (attendees)	The Salesforce Attendees field must be added to the event page layout to see the attendees list in Salesforce.  To understand how the attendees field and attendee responses sync, see <a href="#">Event Attendee Sync</a> .
Description	Description (description)	
End	No field label	In Google Calendar, this field is shown with the options to select an end time or day. The API label for the Google field is end.
Location	Location (location)	
Assigned To	Organizer (organizer)	
Private	No field label	In Google Calendar, this field is shown with the options to select an end time or day. The API label for the Google field is visibility.
Reminder Date/Time	No field label	In Google Calendar, this field is shown as the options Default visibility, Public, or Private. The API label for the Google field is reminders.
Reminder Set	No field label	In Google Calendar, this option can be set by dismissing the Notification or Email options. The API label for the Google field is isReminderSet.
Show Time As	No field label	In Google Calendar, this field is shown as an icon with the options Busy or Free. The API label for the Google field is status.
Start OR Time	No field label	In Google Calendar, this field is shown with the options to select a start time or day. The API label for the Google field is start.  The Salesforce field Time syncs with the Google field Start only if multiday events are enabled in Salesforce. Otherwise, the Salesforce field Start syncs with the Google field Start.
Subject	No field label	In Google Calendar, this field is a text field with Add title in the field prompt. The API label for the Google field is summary.

Salesforce Field	Google Field	Details
Time Zone	Time zone (timeZone)	

## SEE ALSO:

[Define Lightning Sync for Microsoft® Exchange Settings for Reps](#)

[Define Lightning Sync for Google Settings for Reps](#)

[Event Sync](#)

[Event Attendee Sync](#)

[Event Series Sync](#)

## Sync for Events Restored from the Recycle Bin

When you're using Lightning Sync, learn which kinds of events restored from the Recycle Bin start syncing again.

These restored events start syncing again, after you update them:

- Standalone events, but only if your admin set your Conflict Behavior setting in your sync configuration to Salesforce always wins.
- While you can restore a complete event series from the Lightning Experience Recycle Bin, there could be unexpected behavior when it starts syncing again. Instead, recreate the event series, and it begins to sync when it's saved.

These restored events don't start syncing again:

- Standalone events, but only if your admin set your Conflict Behavior setting in your sync configuration to Exchange always wins or Google always wins.
- Standalone events that were once part of an event series (repeating event created in Lightning Experience)
- Recurring events (repeating events created in Salesforce Classic)
- Standalone events that were once part of a recurring event

Rather than restoring them from the Recycle Bin, recreate these types of events instead. After the new events are saved, they start to sync.

### EDITIONS

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

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

## Manage Your Syncing Contacts

If you're a Lightning Sync user, see how you can decide which contacts sync between your Microsoft or Google applications and Salesforce.

### [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.

### [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.

#### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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 Google

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

**Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

**Note:** If you're set up to sync both ways, we recommend that you or your admin create relevant Salesforce accounts before rolling out contact sync. Otherwise, if reps don't resolve unmatched Salesforce contacts before the next sync cycle, Lightning Sync removes the company from the Google contact.

After your Salesforce admin initiates contacts sync for you, Lightning Sync creates a group in Google Contacts called `Salesforce Sync`. If you're set up to sync from Salesforce to Google (or both ways), any contacts that have synced are found in the `Salesforce Sync` group. Gmail™ accesses those contacts automatically when you attempt to email or chat with those contacts.

If you're set up to sync from Google Contacts to Salesforce (or both ways), you can start syncing a Google Contact by following these steps.

1. On the contact's Email field, add the Work label. Adding no label, other standard labels, or custom labels prevents the Google contact from syncing to Salesforce. Likewise, if you want the Google contact Phone field to sync, add one of the following labels to the phone field: Home, Work, Other, Mobile, or Work Fax.
2. Add the contact to the Salesforce Sync group.

Lightning Sync starts syncing those contacts 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

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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 an active Lightning Sync configuration

To sync contacts from Salesforce to Google:

- Read on contacts

AND

Contact sync direction set to Salesforce to Google in an active Lightning Sync configuration

To sync contacts from Google to Salesforce:

- Create on contacts

AND

Contact sync direction set to Google to Salesforce in an active Lightning Sync configuration

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

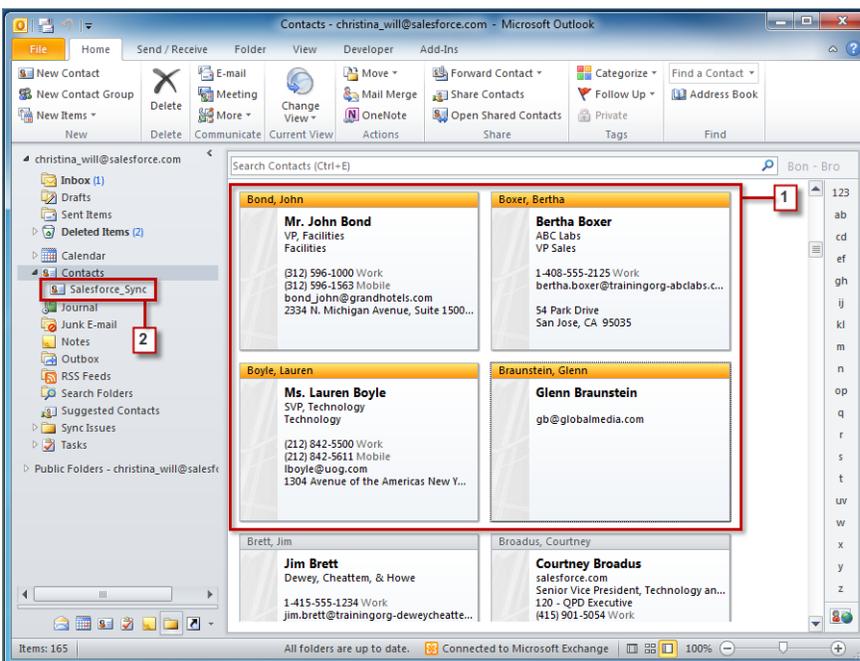
Learn how to sync contacts between your company's email application and Salesforce using Lightning Sync.

**Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

**Note:** If you're set up to sync both ways, we recommend that you or your admin create relevant Salesforce accounts before rolling out contact sync. Otherwise, if you don't resolve unmatched Salesforce contacts before the next sync cycle, Lightning Sync removes the company from the Microsoft contact.

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.



### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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 an active Lightning Sync configuration

To sync contacts from Salesforce to Exchange:

- Read on contacts

AND

Contact sync direction set to Salesforce to Exchange in an active Lightning Sync configuration

To sync contacts from Exchange to Salesforce:

- Create on contacts

AND

Contact sync direction set to Exchange to Salesforce in an active Lightning Sync configuration

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.

 **Note:** Contact sync doesn't support Outlook categories, so contacts labeled with a `Salesforce_Sync` category that don't exist in a contacts subfolder of the same name don't sync with Salesforce. To avoid this issue, disable contact categories and select the `Salesforce_Sync` folder for new contacts in Outlook. See [EAC - New Contacts Created In Outlook with 'Salesforce\\_Sync' Category Do Not Sync to Salesforce](#).

## Manage Your Syncing Events

If you're a Lightning Sync user, see how you can decide which events sync between your Microsoft or Google applications and Salesforce.

### [Get Ready to Sync Events with Lightning Sync for Microsoft® Exchange](#)

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

### [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.

### [Use the Outlook or Gmail Integration to Select Which Events Sync](#)

Sales reps can select Outlook calendar or Google Calendar events that they want to sync with Salesforce. After Salesforce admins set up the feature, reps can select which Outlook or Google events sync by logging them to Salesforce using the Outlook or Gmail integration. Event updates sync depending on a user's sync direction and where they make the update.

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

### USER PERMISSIONS

To sync events both ways:	Read and Edit on events AND Event sync direction set to Sync both ways in an active Lightning Sync configuration
To sync events from Salesforce to Exchange:	Read on events AND Event sync direction set to Salesforce to Exchange in an active Lightning Sync configuration

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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 records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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

To sync events from your calendar to Salesforce:

Create on events

AND

Event sync direction set to Exchange to Salesforce in an active Lightning Sync configuration\*

\*If admins enable the Automatically relate events to Salesforce records option in a user's sync configuration, users should also have Read on contacts and leads to take advantage of that feature.

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

**Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

If your administrator has set up Lightning Sync for Microsoft Exchange, your events sync automatically between your Microsoft calendar to Salesforce. Events sync when you create or update them. If you've got many events, your first sync could take some time.

Admins decide in what direction your events sync: between Salesforce and your Microsoft Exchange server, or just one way. Ask your admin in which direction you're set up to sync, so you know where to update your events.

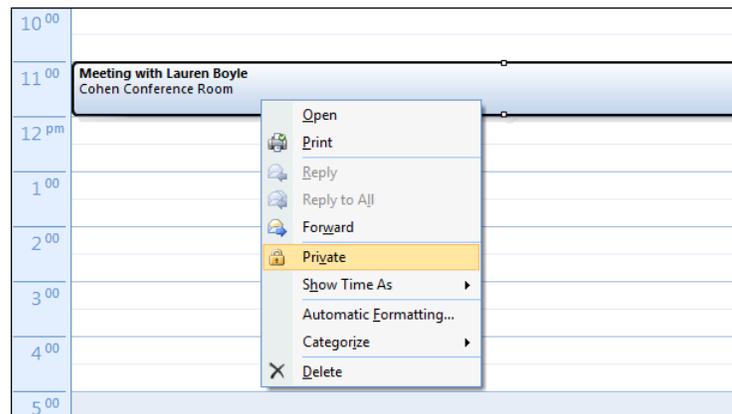
Admins can select more settings to define your sync experience. Ask your admin about how you're set up to sync in these cases:

## Prevent Personal Events from Syncing

You can prevent 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 default 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.



## Respond to Event Invitations from Your Microsoft Calendar

Your responses to event invitations don't sync from Salesforce to your Microsoft Exchange-based calendar. To avoid overwriting your attendance status, [learn where is best to accept and decline event invitations based on your sync direction](#) on page 551.

## Get Ready to Sync Events with Lightning Sync for Google

### USER PERMISSIONS

To sync events both ways:

Read and Edit on events

AND

Event sync direction set to Sync both ways in an active Lightning Sync configuration

To sync contacts from Salesforce to Google:

Read on events

AND

Event sync direction set to Salesforce to Google in an active Lightning Sync configuration

To sync contacts from Google to Salesforce:

Create on events

AND

Event sync direction set to Google to Salesforce in an active Lightning Sync configuration\*

\*If admins enable the Automatically relate events to Salesforce records option in a user's sync configuration, users should also have Read on contacts and leads to take advantage of that feature.

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

**!** **Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

If your administrator has set up Lightning Sync for Google, your events sync automatically from Google Calendar to Salesforce. Events sync when you create or update them. If you've got many events, your first sync could take some time.

Admins decide in what direction your events sync: between Salesforce and your Google Calendar, or just one way. Ask your admin in which direction you're set up to sync, so you know where to update your events.

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

### Prevent Personal Events from Syncing

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

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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

- 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.

## Respond to Event Invitations from Your Google Calendar

If you're set up to sync events with Lightning Sync, your responses to event invitations don't sync from Salesforce to Google Calendar. To avoid overwriting your attendance status, [learn where is best to accept and decline event invitations based on your sync direction](#) on page 551.

## Use the Outlook or Gmail Integration to Select Which Events Sync

Sales reps can select Outlook calendar or Google Calendar events that they want to sync with Salesforce. After Salesforce admins set up the feature, reps can select which Outlook or Google events sync by logging them to Salesforce using the Outlook or Gmail integration. Event updates sync depending on a user's sync direction and where they make the update.

## How Reps Select Which Events Sync to Salesforce

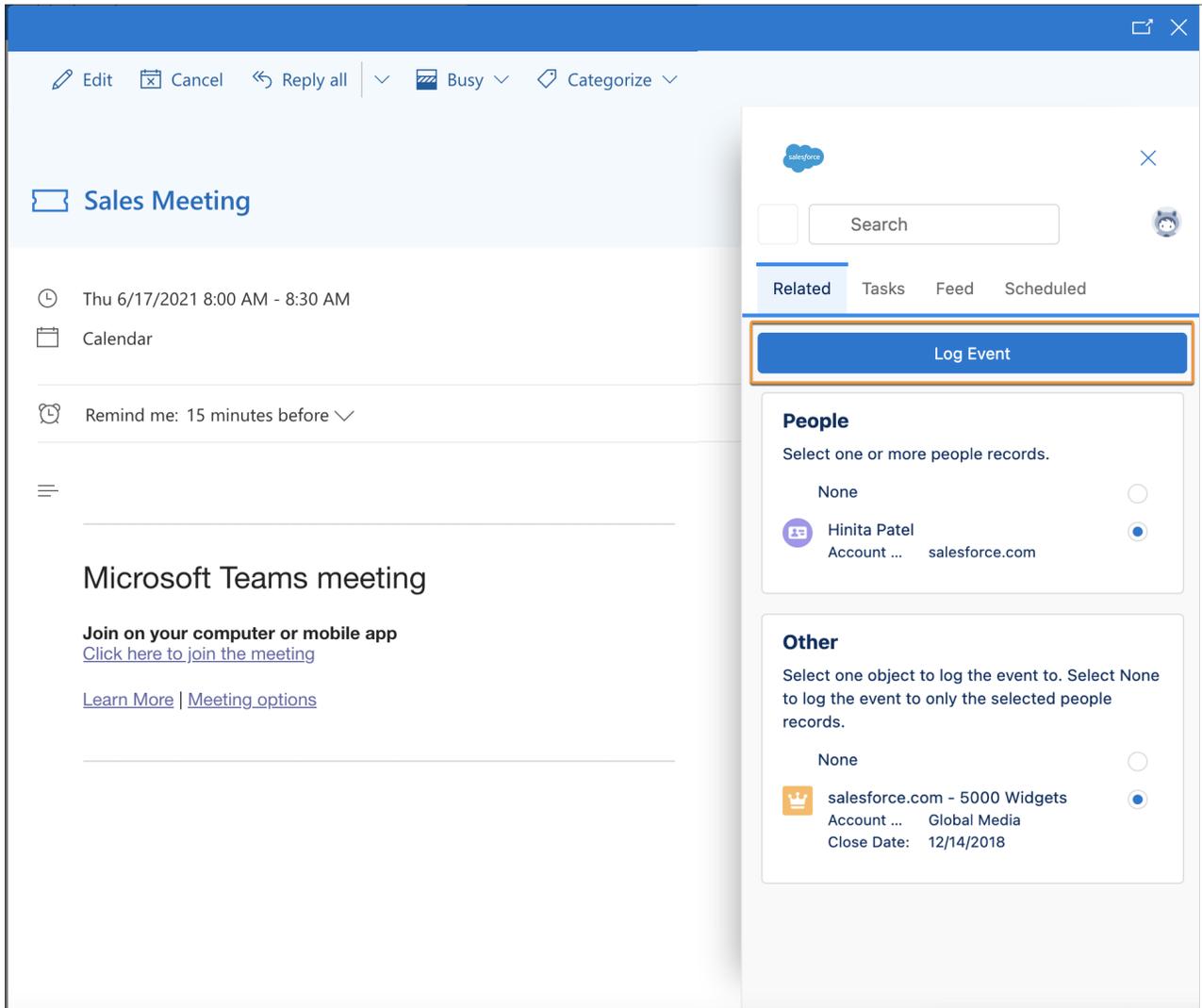
To select which Outlook or Google events sync, reps click **Log Event** from the Outlook or Google integration. Here's an example of how it looks from the Outlook integration.

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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



### How Events Sync

After they're logged, events sync based on the user's sync direction and where the user updates the event.

Sync direction	Sync details
<ul style="list-style-type: none"> <li>• Exchange to Salesforce</li> <li>• Google to Salesforce</li> </ul>	<p>Reps log an event using the Outlook or Google integration.</p> <ul style="list-style-type: none"> <li>• Subsequent updates made to the Outlook or Google event sync to Salesforce.</li> <li>• Subsequent updates made to the Salesforce event don't sync to Outlook or Google.</li> </ul>
Sync both ways	<p>Reps log an event using the Outlook or Google integration.</p> <ul style="list-style-type: none"> <li>• Subsequent updates made to the Outlook or Google event sync to Salesforce.</li> </ul>

Sync direction	Sync details
	<ul style="list-style-type: none"> <li>Subsequent updates made to the Salesforce event sync to Outlook or Google.</li> </ul> <p>With the Sync both ways direction selected, remember that any events created in Salesforce (and their updates) still automatically sync to Outlook or Google.</p>
<ul style="list-style-type: none"> <li>Salesforce to Exchange</li> <li>Salesforce to Google</li> </ul>	<p>Because this feature requires Outlook or Google Calendar to initiate sync, the feature isn't supported for these sync directions. Instead, all events sync from Salesforce to Outlook or Google</p>

## How to Set Up the Feature

This table tells Salesforce admins how to set up the feature based on the calendar application that users' work from.

Calendar application	What to do
Microsoft Outlook (Microsoft Exchange)	<ol style="list-style-type: none"> <li>Turn on the feature from the user's sync configuration. For the Specify Which Exchange Events Sync to Salesforce option, select <b>Events users select</b>. Save your configuration and make sure it's marked as active. For help, see step 10 in <a href="#">Define Lightning Sync for Microsoft Exchange Settings for Reps</a>.</li> <li>If you haven't already, set up the Outlook integration app for your users.</li> <li>Let users know that from now on, events that they log to Salesforce using Outlook integration sync with Salesforce.</li> </ol>
Google Calendar	<ol style="list-style-type: none"> <li>Turn on the feature from the user's sync configuration. For the Specify Which Google Events Sync to Salesforce option, select <b>Events users select</b>. Save your configuration and make sure it's marked as active. For help, see step 9 in <a href="#">Define Lightning Sync for Google Settings for Reps</a>.</li> <li>If you haven't already, set up the Gmail integration app for your users.</li> <li>Let users know that from now on, events that they log to Salesforce using Gmail integration sync with Salesforce.</li> </ol>

## How Events Are Logged When the Feature Is Turned Off

The Log Event button on the Outlook and Gmail integration works differently when admins choose these other event sync options for Lightning Sync.

- Admins can choose to sync all of users' events (by selecting All events for the Specify Which Events Sync to Salesforce option).
- Admins can choose turned off event sync (by selecting the event sync direction Don't Sync).

When these options are selected, users set up for the Outlook or Gmail integration can still log events to their Salesforce record from the side panel in Outlook or Gmail. But when subsequent activity occurs on the logged event, corresponding updates don't sync to Salesforce. Instead, to add the new activity to Salesforce, the user must log the updated Outlook event to Salesforce again. See [Guidelines for Logging Events from Outlook and Gmail to Salesforce](#).

## SEE ALSO:

[Get Ready to Sync Events with Lightning Sync for Microsoft® Exchange](#)

[Get Ready to Sync Events with Lightning Sync for Google](#)

## Lightning Sync Considerations

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

**!** **Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

### [Considerations for Syncing Contacts](#)

Familiarize yourself with these considerations for syncing contacts with Lightning Sync.

### [Considerations for Syncing Events](#)

Familiarize yourself with these considerations for syncing events with Lightning Sync.

### [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.

### [Lightning Sync Considerations for Companies With Multiple Salesforce Organizations](#)

If your company uses multiple Salesforce organizations, review these considerations to avoid sync issues and unsupported configurations.

## SEE ALSO:

[Reference Considerations for Moving from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#)

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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

## Considerations for Syncing Contacts

Familiarize yourself with these considerations for syncing contacts with Lightning Sync.

- Contact sync isn't supported for Lightning Sync customers working from the user license Lightning Platform - One App. Lightning Platform - One App doesn't include the Contacts object.
- Lightning Sync can sync up to 50,000 contacts per user. If you have more than 50,000 contacts assigned to you, an additional nonsyncing contact is picked up for sync only when one of the 50,000 stops syncing. A contact stops syncing if you delete a contact in Salesforce or your Microsoft or Google application, or if a contact sync issue occurs.
- Sometimes Lightning Sync can't match a Salesforce account to a contact synced from Microsoft or Google. In that case, Lightning Sync lists partial matches on the Unresolved Items page in users' Personal Settings. For users who sync both ways, if the next sync cycle occurs before the user manually relates a Salesforce account, the company is removed from the Microsoft or Google contact. To prevent this issue, we recommend that admins create Salesforce accounts that map to Microsoft or Google companies before rolling out contact sync to users. That way, when contacts with companies sync from Microsoft or Google, Salesforce accounts match automatically.
- When users delete contacts from one calendar application, Lightning Sync doesn't automatically remove those contacts from the other calendar application. Automatically removing contacts from Salesforce can impact your sales data. Rather than deleting the contact in Salesforce, we recommend that reps update the Contact Status field to indicate when a contact has left a company, is deceased, and so forth.
- If contacts are regularly taking longer than a few minutes to sync, admins can reduce wait times by limiting the number of syncing contacts. On sync configuration datasets, from the contact filter `Sync` option, select **Selected Contacts**, instead of **All Contacts**. Doing so syncs only contacts that a user owns, rather than all contacts in Salesforce that a user can see.
- If a change you made in Salesforce didn't sync to your external contact application, you could have experienced a sync conflict. Sync conflicts can occur when at least one of these conditions is true.
  - You're set up to sync contacts both ways
  - You, another user with access, or an automated action updates the contact in your external application and Salesforce before Lightning Sync syncs the change

If a sync conflict occurs, Lightning Sync gives preference to the change made in your external contact application. If automatic, mass contact updates are made from your Microsoft or Google application or Salesforce, you're likely to experience sync conflicts more often. Companies usually make mass contact updates when admins or developers set up automation or create custom API calls to create or update Salesforce, Microsoft, or Google contacts.

- If you've added custom fields to your Salesforce contacts, Lightning Sync doesn't sync those fields between Salesforce and your Microsoft or Google application. But when matching records between Salesforce and your Microsoft or Google application, Lightning Sync considers custom email fields on Salesforce records when Shield Platform Encryption is applied to some standard fields. See the next bullet.
- Lightning Sync is supported when Shield Platform Encryption is enabled on any Salesforce object or field. But if you encrypt the Email field on the User object, the User Email field is duplicated in the Salesforce database when users are added to sync configurations that sync contacts or events. Even when the User Email field is encrypted using Shield Platform Encryption, this duplicate field stores user emails in the Salesforce database in an unencrypted state. When Shield Platform Encryption is turned on, Lightning Sync matching behavior is modified. Normally, Lightning Sync matches contacts between Salesforce and your Microsoft or Google application using the same standard Salesforce fields. But when you encrypt the Email field on Salesforce contacts, Lightning Sync expands its search to any custom email field you've added to the Salesforce contact. Lightning Sync syncs the first matching email address it identifies, so contacts could be matched based on the standard Email field or the custom email field.

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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

- Some contact sync features can be limited on Microsoft or Google mobile apps. For more details, check product documentation for those apps.
- Formula fields aren't supported when setting filter conditions that contacts must meet to sync.
- Lightning Sync doesn't support contact or event matching with alias email addresses. To make sure that contacts and events sync between applications, opt to add primary email addresses to contacts or events when possible.
- When creating contacts in your Google application, the Email field must include the standard label Work for the contact to sync. The Phone field must include one of the following standard labels for the phone number to sync: Home, Work, Other, Mobile, or Work Fax.
- Contact sync doesn't support Outlook categories, so contacts labeled with a Salesforce\_Sync category that don't exist in a contacts subfolder of the same name don't sync with Salesforce. To avoid this issue, disable contact categories and select the Salesforce\_Sync folder for new contacts in Outlook. See [EAC - New Contacts Created In Outlook with 'Salesforce\\_Sync' Category Do Not Sync to Salesforce](#).

## Considerations for Syncing Events

Familiarize yourself with these considerations for syncing events with Lightning Sync.

### General Considerations

#### Attachments

Event attachments don't sync between Microsoft® Exchange or Google and Salesforce.

#### Attendees

- Up to 50 event attendees sync between Salesforce and Microsoft Exchange or Google.
- Syncing attendees experience unexpected sync behavior with events created by nonsyncing organizers.
  - If the event is created in Salesforce, each attendee sees their own version of the event on their Salesforce calendar. The syncing attendees' version of the event doesn't sync.
  - If created in an external calendar, the attendee's event syncs to Salesforce, assuming the attendee is set to sync Exchange to Salesforce, Google to Salesforce, or both ways. On the version of the event synced to Salesforce, the attendee is the organizer and only participant. Other attendees aren't visible. The attendee can edit any field, but those edits don't sync from Salesforce to Exchange. If the nonsyncing organizer updates the event from your calendar application, the organizer's edits override the attendee's and sync to Salesforce. Letting the organizer's edits override the attendee's ensures that the attendee sees the latest meeting details. In these scenarios, the nonsyncing organizer can be a nonsyncing Salesforce user or an outsider to the syncing attendee's Salesforce org, email domain, or company.
- Event invitations and cancellations for syncing events are emailed to attendees from Exchange or Google, not from Salesforce.
- Attendee responses to event invitations never sync from Salesforce to Exchange or Google. In Lightning Experience and the Salesforce mobile app, it isn't possible for attendees to respond to event invitations. To avoid overwriting attendance statuses in Salesforce Classic, [users can learn where to respond to event invitations based on their set sync directions](#).
- Attendees can be unintentionally removed from syncing events when both of these conditions are met.
  - When the organizer is set up for one of these sync directions: Both Ways, Exchange to Salesforce, or Google to Salesforce.
  - When a user changes or removes the matching email address from the Salesforce user account, contact, or lead.

Exception: Under these conditions, original attendee records can remain invited to syncing events despite having been intentionally removed.

#### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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

- When the organizer replaces the email address on the Microsoft or Google event with an address that doesn't match the original Salesforce user, contact, or lead.
- When a user adds an email address on the Microsoft or Google event, and the email address matches a record that has an original attendee's email address in a custom email field.
- If an event organizer is set up to sync after attendees have been syncing, participants can experience some unexpected behavior for scheduled events.
  - Attendees can see and change a standalone event on their Salesforce calendars. When an event organizer is set up to sync after attendees have been syncing, a new syncing event is created. The event organizer sees the new syncing event, but to prevent duplicates, attendees with a standalone event don't see the syncing event. If an organizer adds new attendees to the new syncing event, attendees with a standalone event see a duplicate event. All meeting participants are visible on the Microsoft or Google event.
  - Attendees sometimes see duplicates in Salesforce after admins reset sync for event organizers and attendees.

### Changing Event Owner

If an event owner is changed, the event is removed from the previous owner's Salesforce calendar, but not from the previous owner's Google or Microsoft calendar.

### Cloning

The clone action is hidden in Salesforce Classic when Lightning Sync is enabled.

### Custom Fields

If you added custom fields to your Salesforce events, Lightning Sync doesn't sync those fields between Salesforce and your calendar application.

But when matching records between Salesforce and your calendar application, Lightning Sync considers custom email fields on Salesforce records when Shield Platform Encryption is applied to some standard fields. See the Shield Platform Encryption section.

### Email Address Aliases

Lightning Sync doesn't support contact or event matching with alias email addresses. To make sure that contacts and events sync between applications, opt to add primary email addresses to contacts or events when possible. To make sure that Salesforce users sync as event attendees on events, assign only primary Microsoft or Google email addresses when you create Salesforce user profiles.

### Salesforce Scheduler

Lightning Sync supports using the Salesforce Scheduler feature with these sync directions only:

- Salesforce to Exchange
- Salesforce to Google

Using Salesforce Scheduler with other sync directions can result in sync failure or overwritten data, including canceled events.

### Mobile

Event sync is supported on all versions of the Salesforce mobile app. Some sync features can be limited on Microsoft or Google mobile apps. For more details, check the product documentation for those apps.

### Shield Platform Encryption

Lightning Sync is supported when Shield Platform Encryption is enabled on any Salesforce object or field.

But if you encrypt the Email field on the User object, the User Email field is duplicated in the Salesforce database when users are added to sync configurations that sync contacts or events. Even when the User Email field is encrypted using Shield Platform Encryption, this duplicate field stores user emails in the Salesforce database in an unencrypted state.

When Shield Platform Encryption is turned on, Lightning Sync matching behavior is modified. Normally, Lightning Sync matches records using the same standard Salesforce fields. But when you encrypt the Email field on Salesforce users, contacts, or leads, Lightning Sync expands its search to any custom email field you added to the record in these cases:

- When matching event attendees between Microsoft or Google and Salesforce

- When automatically relating matching Salesforce contacts or leads to your events

Because Lightning Sync relates the first matching email address it identifies, users, contacts, and leads can be matched based on the standard Email field or a custom email field.

### Sync Conflicts

- If a change you made in Salesforce didn't sync to your calendar, you could have experienced a sync conflict. Sync conflicts occur when at least one of these conditions is true.
  - You're set up to sync events both ways.
  - You, another user with access, or an automated action updates the event in your calendar application and Salesforce before Lightning Sync syncs the change

If a sync conflict occurs, Lightning Sync gives preference to the change made in your external calendar. If automatic, mass event updates are made from your calendar application or Salesforce, you're likely to experience sync conflicts more often. Companies usually make mass event updates when admins or developers set up automation or create custom API calls to create or update Salesforce, Microsoft, or Google events.

### Sync Totals

Lightning Sync can sync up to 50,000 events per user. If you have more than 50,000 events that meet the event sync filters set by your admin, an additional nonsyncing event is picked up for sync only when one of the 50,000 stops syncing. An event stops syncing when any one or more of these conditions are true.

- If someone deletes the event in Salesforce or in the Microsoft or Google calendar application
- If the event occurred and no longer meets past event sync filters
- If an event sync issue occurs

## Considerations for Syncing Events with Google Calendar™

### Event Series and Recurring Events

Sync for recurring events (Salesforce Classic) and event series (Lightning Experience, the Salesforce app) isn't supported for Lightning Sync for Google.

### Event Descriptions

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 with Microsoft® Calendar

Events created using Bookings with Me in Outlook don't sync between Microsoft and Salesforce.

Sync for event series (repeating events created in Lightning Experience, the Salesforce app) is supported only for Microsoft Exchange.

- Sync for recurring events (repeating events created in Salesforce Classic) isn't supported.
- If you're set up to specify which Microsoft events sync to Salesforce using the Outlook integration, that feature isn't supported for event series. If you select an event series in Outlook, the option to log that event isn't available.
- When you edit a series from Microsoft calendar, only updates to future events sync to Salesforce. When you delete a series from Microsoft calendar, only future events are removed from Salesforce.
- When you delete individual events from an event series, the delete syncs between Salesforce and Microsoft calendars based on your sync direction. The individual events are removed from the Microsoft series regardless of whether your Salesforce admin has selected the Delete synced events option in your sync configuration.
- When you convert a series to a standalone event from Microsoft calendar, Lightning sync doesn't remove the series from Salesforce calendar. Instead, we recommend that you delete the series from Microsoft calendar and create a standalone event.

- When you convert a standalone event to a series from Microsoft calendar, Lightning Sync deletes the matching standalone event in Salesforce and creates a series. The new series doesn't retain relationships from the original event to other Salesforce records that you added manually. If you're set up to automatically relate contacts or leads to events, Lightning Sync attempts to relate records based on the data you saved in the new series.
- When you make critical changes to your series from either your Microsoft calendar or Salesforce, Salesforce event descriptions and relationships to other records aren't retained. Events that you edited to fall outside of the series are also updated and begin syncing again. Deleted events are recreated to include the critical changes and also begin syncing again. Critical changes include modifications to:
  - All-day event checkbox
  - Appointment times (StartDateTime, Duration)
  - Recurrence patterns (RecurrenceType, Instance, Interval, DayOfMonth, DayOfWeekMask, MonthOfYear, DayOfWeekIndex)
  - Ranges of occurrences (Occurrences, EndDateOnly, EndKind)
- Editing the Assigned To field for an event series is possible, but it causes issues when syncing with Microsoft calendars. To reassign an event series, delete the series, and recreate it with the desired owner.
- Changing the private flag on an individual event from a series is possible, but it causes issues when syncing with Microsoft calendars. To set a different private flag for an individual event, create a standalone event with the private flag set as desired.
- When an event series includes recurrence patterns supported in Microsoft but not in Salesforce, you can't see or edit the pattern in Salesforce. Instead, edit these events from your Microsoft calendar.

## SEE ALSO:

[Respond to Event Invitations from Your Microsoft or Google Calendar](#)

## Respond to Event Invitations from Your Microsoft or Google Calendar

To avoid overwriting your attendance status when syncing with Einstein Activity Capture or Lightning Sync, consider your sync direction before you accept and decline event invitations.

If you work in Lightning Experience or the Salesforce App, accepting and declining event invitations isn't available.

If you work in Salesforce Classic, accepting and declining invitations is possible, but isn't recommended for Einstein Activity Capture or Lightning Sync users syncing events in certain directions. Because responses to event invitations don't sync from Salesforce to your Microsoft® or Google Calendar™, you could unintentionally override your attendance status. To avoid doing so, learn how sync directions impact which application to use when responding to event invitations. If you're not sure what direction your events are syncing, talk to your Salesforce admin.

Sync Direction	Application to Respond from	Reason
<ul style="list-style-type: none"> <li>• Exchange to Salesforce</li> <li>• Google to Salesforce</li> <li>• Both Ways</li> </ul>	<ul style="list-style-type: none"> <li>• Microsoft Exchange–based calendar</li> <li>• Google Calendar</li> </ul>	<p>Because your response syncs to Salesforce, the status is accurate in both applications.</p> <p>If you respond from Salesforce, your status is overwritten the next time Microsoft or Google events sync to Salesforce.</p>

### EDITIONS

Einstein Activity Capture is available in Lightning Experience and all versions of the Salesforce mobile app in **Essentials, Professional, Enterprise, Performance, and Unlimited** Editions

Lightning Sync is available in Salesforce Classic, Lightning Experience, and the Salesforce mobile app in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Sync Direction	Application to Respond from	Reason
<ul style="list-style-type: none"> <li>• Salesforce to Exchange</li> <li>• Salesforce to Google</li> </ul>	<ul style="list-style-type: none"> <li>• Microsoft Exchange–based calendar</li> <li>• Google Calendar</li> <li>• Salesforce</li> </ul>	Because responses don't sync from Salesforce to Microsoft or Google, your attendance status remains only in the application where you responded. To show your attendance status in both applications, you have to respond in both applications.

## 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 routinely edit their events records in Salesforce
- Reps already have access to the Outlook integration or the Gmail integration

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 from Your Calendar Application to Salesforce Only](#)

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

#### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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

## Guidelines for Syncing Events from Your Calendar Application to Salesforce Only

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.)

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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

## Lightning Sync Considerations for Companies With Multiple Salesforce Organizations

If your company uses multiple Salesforce organizations, review these considerations to avoid sync issues and unsupported configurations.

You're using multiple organizations if you:

- Test new features in a sandbox org before setting up features in your live production org.
- Maintain separate Salesforce orgs for different divisions of your company.

Setting up the same user to sync across multiple orgs is not supported. While we recommend testing in a sandbox org before rolling out Lightning Sync, remove users from sandbox sync configurations before adding users to production configurations.

Likewise, we don't recommend marking a Lightning Sync configuration as inactive to prevent a user from syncing across multiple orgs. You risk forgetting that user is included in multiple configurations, and marking the configuration as active later, by accident.

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

Before you add Marianne to a configuration in your production org, remove her from the configuration in your sandbox org. Otherwise, Marianne could experience sync issues. You also risk syncing test data onto your production org and email server.

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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

## 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.

**!** **Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and 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. [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.
6. [Tell Reps How to Sync Microsoft® Contacts with Salesforce](#)  
It's time for Salesforce admins to tell their sales reps to manage the Microsoft contacts that reps want to sync with Salesforce.

### SEE ALSO:

[Learn About Lightning Sync for Microsoft® Exchange Features](#)  
[Lightning Sync Trailblazer Community](#)

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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.

**Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

When your contacts and events sync between your company's Microsoft® Exchange server and Salesforce, you increase your productivity. 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 the Salesforce mobile app.

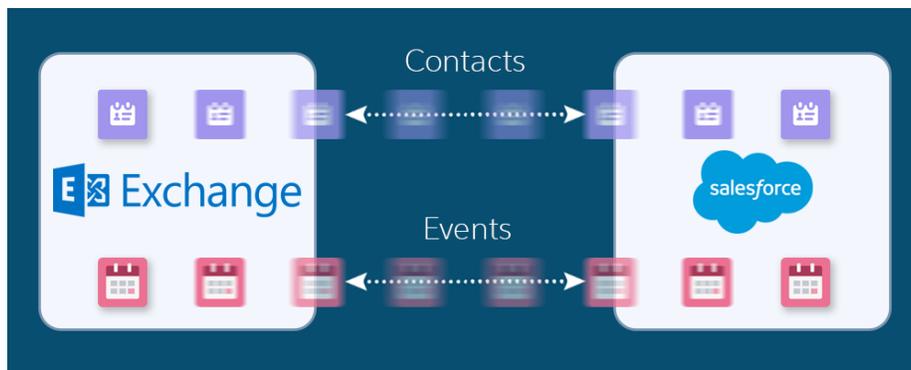
Salesforce admins define your experience by selecting sync settings from Salesforce. For example, admins can choose whether both contacts and events sync, or whether only contacts or only events sync. Admins can also decide which direction your items sync: between Salesforce and your Microsoft Exchange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

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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 set up all events to sync or only the events that you select. If you're set up to sync only selected events, you can choose which events to sync using the [Outlook integration](#) app. Outlook integration lets you experience Salesforce features directly from Microsoft Outlook®.

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

- Are you syncing private events?
- Are events that you delete in one calendar automatically removed from the other?
- Are your events automatically related to relevant Salesforce contacts, or one relevant lead?
- Are you syncing event series (repeating events created in Lightning Experience or the Salesforce mobile app)?

### Lightning Sync for Microsoft Exchange Limitations

Currently, Lightning Sync doesn't. See [Lightning Sync Considerations](#) for more details.

- Sync tasks. Instead, admins can set up the [Outlook integration](#) app to let you work with Salesforce tasks from Outlook.
- Sync recurring events (repeating events created in Salesforce Classic). Instead, move to Lightning Experience—Lightning Sync can sync event series (repeating events created in Lightning Experience).

- Automatically remove deleted contacts from the other application.

## SEE ALSO:

[Outlook and Gmail Integration](#)

[Lightning Sync Security](#)

[Help Sales Reps Sync Contacts and Events with Lightning Sync \(Admin Guide\)](#)

[Sync Your Contacts and Events with Lightning Sync \(User Guide\)](#)

[Considerations for Syncing Contacts](#)

[Considerations for Syncing Events](#)

## 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.

**!** **Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

### [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.

## SEE ALSO:

[Service Account Connection for Microsoft Users](#)

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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

## 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.

**Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

### 1. [Prepare Your Microsoft Exchange Server for Lightning Sync](#)

To set up Lightning Sync using the service account connection method, enable these settings on your Microsoft® Exchange server: Exchange Web Services, Exchange Autodiscover Service, and Basic or NTLM authentication.

### 2. [Set Up a Microsoft Exchange Service Account to Communicate with Lightning Sync](#)

To set up Lightning Sync using a service account, 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.

SEE ALSO:

[Service Account Connection for Microsoft Users](#)

#### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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

- Customize Application AND Manage Users AND Manage Lightning Sync

## Prepare Your Microsoft Exchange Server for Lightning Sync

To set up Lightning Sync using the service account connection method, enable these settings on your Microsoft® Exchange server: Exchange Web Services, Exchange Autodiscover Service, and Basic or NTLM authentication.

-  **Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.
-  **Important:** Microsoft is retiring Basic Authentication for Exchange Online. When Microsoft blocks Basic Authentication in your Microsoft tenant, Lightning Sync can't sync contacts and events for customers who have selected service account as their Lightning Sync connection method. See [Lightning Sync Service Account Connection Method Availability for Customers on Microsoft Office 365](#).

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

Enable these settings on your Exchange server.

1. Enable Exchange Web Services (EWS) on an SSL connection.
  - a. Make sure that your Exchange server has a signed certificate from one of the [Salesforce-approved Certificate Authorities](#).
  - b. 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 or NTLM authentication on your Exchange server and on your Autodiscover server. If Basic and NTLM are enabled, Lightning Sync gives connection preference to Basic.

### SEE ALSO:

[Service Account Connection for Microsoft Users](#)

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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

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

To set up Lightning Sync using a service account, create an Exchange service account with impersonation rights for the mailbox of each Lightning Sync user.

**Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

**Important:** Microsoft is retiring Basic Authentication for Exchange Online. When Microsoft blocks Basic Authentication in your Microsoft tenant, Lightning Sync can't sync contacts and events for customers who have selected service account as their Lightning Sync connection method. See [Lightning Sync Service Account Connection Method Availability for Customers on Microsoft Office 365](#).

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 2019, 2016, or 2013, complete these extra steps.
  - a. Enable the Active Directory extended permission for `ms-Exch-EPI-Impersonation` on all Client Access servers.

```
Get-ExchangeServer | where {$_IsClientAccessServer -eq $TRUE} | ForEach-Object
{Add-ADPermission -Identity $_.distinguishedname -User (Get-User -Identity
<EnterExchangeSyncServiceAccountEmailAddress> | select-object).identity
-extendedRight ms-Exch-EPI-Impersonation}
```

- 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}
```

3. Using Exchange Management Shell, enter these commands to configure your service account to impersonate the group of users who you want to sync with Lightning Sync.

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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. 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 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:<ChooseExchangeSyncRoleAssignmentName>
-Role:ApplicationImpersonation -User:<EnterExchangeSyncServiceAccountAddress>
-CustomRecipientWriteScope:<EnterExchangeSyncScopeName>
```

### 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:

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

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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

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**.
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.

**!** **Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

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

### SEE ALSO:

[Service Account Connection for Microsoft Users](#)

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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:

- Manage Users

AND

Manage Lightning Sync

## 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.

**!** **Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

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

SEE ALSO:

[OAuth 2.0 Connection for Microsoft Users](#)

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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:

- Manage Users

AND

Manage Lightning Sync

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 **Outlook integration 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 records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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:

- Manage Users
- AND
- Manage Lightning Sync

## 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.

## 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 reps' event series sync (Lightning Experience, Salesforce app)
  - Whether all events sync, or only events that users log to Salesforce records using the Outlook integration
  - 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
1. From Setup, enter *sync* in the *Quick Find* box, then select **Outlook Integration and Sync**.
  2. Click **Let users sync contacts, events, or both between Microsoft Exchange and Salesforce** to see more setup steps.
  3. From the Set Sync Settings and Check Status section, click **New Config**.

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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 records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile app

Available to set up from: Salesforce Classic and Lightning Experience

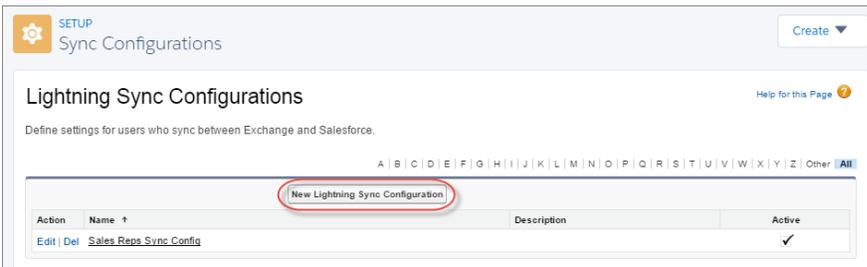
Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions with Sales Cloud, Service Cloud, and Lightning Platform

### USER PERMISSIONS

To access Lightning Sync setup:

- Manage Users
- AND
- Manage Lightning Sync

4. Click **New Lightning Sync Configuration**.



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 select All events, all of the events on a user's default Outlook calendar syncs with Salesforce.
- If you select Events users select, events users log to Salesforce from the Outlook integration start syncing from Microsoft Exchange to Salesforce. To finish setting up that option, you're required to enable the Outlook integration, and your users are required to complete the integration setup in Outlook. To learn more about how this setting works, see [Use the Outlook or Gmail Integration to Select Which Events Sync](#).

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**.

If you wish, set more sync filters. 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. 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 552 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.
15. Select `Sync private events` to sync events your users have marked private either in Salesforce or their calendars.
16. Select `Delete synced events` to let reps delete Exchange events and Salesforce events in one action.
17. Select `Automatically relate Exchange events to Salesforce records` to let Lightning Sync review reps' calendars and intelligently relate important events to the appropriate Salesforce contacts or leads automatically.

**18.** Select `Sync event series` to let reps sync repeating events (Lightning Experience, Salesforce mobile app). Event series created in Salesforce Classic (also known as recurring events) don't sync with Microsoft Outlook.

**19.** Click **Save**.

Syncing has begun for users in this Lightning Sync configuration.

SEE ALSO:

[Contact Sync Filters](#)

[How Salesforce Manages Sync Conflicts Between Products](#)

[Lightning Sync Considerations for Companies With Multiple Salesforce Organizations](#)

## Tell Reps How to Sync Microsoft® Contacts with Salesforce

It's time for Salesforce admins to tell their sales reps to manage the Microsoft contacts that reps want to sync with Salesforce.

If you've set up 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. If you've set up reps to sync both ways, we recommend that you or your reps create relevant Salesforce accounts before you roll out contact sync. Otherwise, if reps don't resolve unmatched Salesforce contacts before the next sync cycle, Lightning Sync removes the company from Microsoft contacts.

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 the contacts that 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.

 **Note:** Contact sync doesn't support Outlook categories, so contacts labeled with a `Salesforce_Sync` category that don't exist in a contacts subfolder of the same name don't sync with Salesforce. To avoid this issue, disable contact categories and select the `Salesforce_Sync` folder for new contacts in Outlook. See [EAC - New Contacts Created In Outlook with 'Salesforce\\_Sync' Category Do Not Sync to Salesforce](#).

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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

## 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.

**!** **Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and 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 Google Account for Lightning Sync](#)  
The IT pro or Google administrator at your company can prepare your Google G Suite account to communicate with Salesforce. Google admins complete these steps by logging in to your company's Google developer console, Google Cloud Platform, and the Google Admin console.
3. [Prepare Salesforce for Lightning Sync](#)  
After an IT pro or Google administrator has prepared your G Suite account for Lightning Sync, complete the necessary steps to set up 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. [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.

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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

To access and edit Lightning Sync Setup

- Customize Application AND Manage Users AND Manage Lightning Sync

## 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.

**Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

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 the Salesforce mobile app.

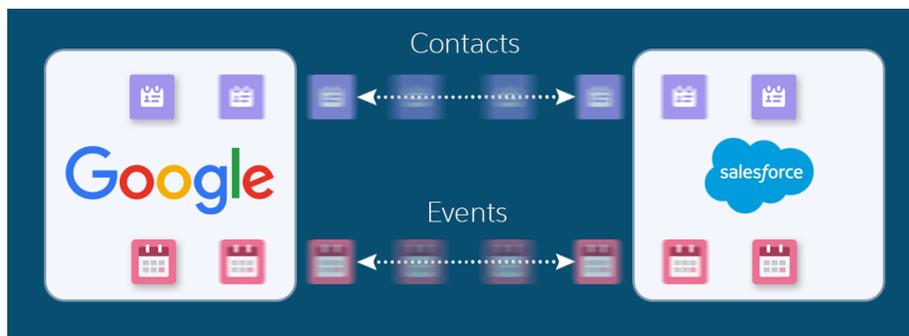
Salesforce admins define a reps' experience by selecting sync settings from Salesforce. For example, admins can choose whether both contacts and events sync, or whether only contacts or only events sync. Admins can also decide which direction your items sync: between Salesforce and your Google account,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

### EDITIONS

Sync available in: Salesforce Classic ([not available in all orgs](#)), Lightning Experience, and the Salesforce mobile app

Set up available in: Salesforce Classic ([not available in all orgs](#)) 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 the [Google Integration](#) app. Gmail integration lets you experience Salesforce features directly from Google applications like Google Contacts, Gmail™, and Google Calendar™.

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

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

### Lightning Sync for Google Limitations

Currently, Lightning Sync for Google doesn't:

- Sync tasks. Admins can set up the [Google integration](#) on page 275 to let you work with Salesforce tasks from Gmail.
- Sync recurring events (repeating events created in Salesforce Classic) or event series (repeating events created in Lightning Experience).
- Automatically remove deleted contacts from the other application.
- Let you edit which Google contact and event fields map to Salesforce contact and events fields.

See [Lightning Sync Considerations](#) for more details.

#### SEE ALSO:

- [Outlook and Gmail Integration](#)
- [Lightning Sync Security](#)
- [See the Big Picture for Setting Up Lightning Sync for Google Considerations for Syncing Contacts](#)
- [Considerations for Syncing Events](#)

## Prepare Your Google Account for Lightning Sync

The IT pro or Google administrator at your company can prepare your Google G Suite account to communicate with Salesforce. Google admins complete these steps by logging in to your company's Google developer console, Google Cloud Platform, and the Google Admin console.

 **Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

For more support, refer to Google developer documentation.

1. Log in to Google Cloud Platform (also known as Google Developer console). Create a Google project that is only intended for your Lightning Sync configuration.

 **Note:** When you're completing setup steps, make sure the Lightning Sync project is always selected on your dashboard. Otherwise, you change settings on your Google account that are unrelated to Lightning Sync.

2. Enable APIs for contacts, events, or both.

- a. Go to the APIs & Services Dashboard, and make sure that your Lightning Sync project is selected. To set up reps to sync events, search for Google Calendar™ API and enable it.
- b. Return to the APIs & Services Dashboard. Make sure that your Lightning Sync project is selected. To set up reps to sync contacts, search for Google People API and enable it.

 **Note:** Starting in Spring '22, Lightning Sync syncs contacts using Google People API, and no longer uses legacy Google Contacts API. For customers who used Lightning Sync for Google before Spring '22, verify which API Services are enabled, and enable Google People API if needed. See [Google Contacts API Retirement: Details for Einstein Activity Capture and Lightning Sync Users](#).

3. Create a service account for your Lightning Sync project.

- a. Return to the APIs & Services Dashboard. Make sure that your Lightning Sync project is selected. Create credentials for a service account with the role `Project Owner` and the key type `JSON`. A JSON private key for your service account is saved to your computer.
- b. Save the key securely and share it with your Salesforce admin. (But only your Salesforce admin.) Your admin needs the key to complete Lightning Sync setup in Salesforce. To download your key again later, do so from the APIs & Services Dashboard.

#### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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

**!** **Important:** People in possession of your private JSON 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 private key isn't a good idea.

- c. Go to the IAM & Admin Dashboard and locate the service account for your Lightning Sync project. Copy the client ID (also known as OAuth 2 Client ID or Unique ID). Keep your Client ID safe but handy, because you need it for the next step.

**!** **Important:** Like your private key, keep the client ID for your Lightning Sync service account private and secure.

4. Enable domain-wide delegation and give read-write authorization for contacts, events, or both.
  - a. Go to the Google Admin console, navigate to the API controls page, and click **Manage Domain-Wide Delegation**.
  - b. From the domain-wide delegation page, add an API client. In the Add a New Client window, paste the client ID that you copied from step 3. Then provide the scope of read-write access that you want your service account to have. To let users sync contacts, add the scopes `https://www.googleapis.com/auth/contacts`. To let users sync events, add `https://www.googleapis.com/auth/calendar`.

**Note:** Starting in Spring '22, Lightning Sync syncs contacts using Google People API, and no longer uses legacy Google Contacts API. For customers who used Lightning Sync for Google before Spring '22, verify the scopes that you have set for read-write access, and update them if needed. See [Google Contacts API Retirement: Details for Einstein Activity Capture and Lightning Sync Users](#).

When you're finished, Salesforce admins can use the private key that you generated to set up Lightning Sync in Salesforce.

## Prepare Salesforce for Lightning Sync

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

**!** **Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

Before preparing Salesforce for Lightning Sync, make sure that you've taken the necessary steps to prepare your company's G Suite 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 `sync` in the `Quick Find` box, then select **Gmail Integration 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.

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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:

- Manage Users
- AND
- Manage Lightning Sync

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. If you need to download your key again, your Google admin can do so from the Google API Console on the APIs & Services Dashboard.

**⚠ Important:** People in possession of your private JSON 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 private key 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.

## 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.

1. From Setup, enter *sync* in the **Quick Find** box, then select **Gmail Integration 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.

## 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.

See [Tell Reps How to Prevent Certain Microsoft® Outlook Calendar Events from Syncing to Salesforce](#).

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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:

- Manage Users
- AND
- Manage Lightning Sync

## 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 log to Salesforce records using the Gmail integration
- 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 **Gmail Integration and Sync**.
2. Click **Let users sync contacts, events, or both between Google and Salesforce** to see more 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*.

Basic Information	
Name	Sales Reps Europe
Active	<input checked="" type="checkbox"/>
Description	Sync settings for sales reps in Europe

6. Assign reps and profiles to this configuration.

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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:

- Manage Users
- AND
- Manage Lightning Sync

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 users select.
  - If you select All events, all of the events on a user's Google calendar syncs with Salesforce.
  - If you select Events users assigned select, events users log to Salesforce from the Outlook integration start syncing from Microsoft Exchange to Salesforce. To finish setting up that option, you're required to enable the Outlook integration, and your users are required to complete the integration setup in Outlook. To learn more about how this setting works, see [Use the Outlook or Gmail Integration to Select Which Events Sync](#) on page 543.
10. Click **Save**.
11. Set additional settings, including 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**.

If you wish, set more sync filters. For example, to prevent contacts from outside your reps' territories from syncing, create sync filters for specific fields on reps' contact records.

Object	Field	Operator	Value	
Contact	Mailing Country	not equal to	United States	AND
Contact	Mailing Country	not equal to	Japan	AND
--None--	--None--	--None--		AND
--None--	--None--	--None--		AND
--None--	--None--	--None--		AND

[Add Row](#) [Remove Row](#)

**Other Contacts to Include**

Sync contacts users follow in Chatter

12. 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 552 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.
13. Select **Sync private events** to sync events your reps have marked as private in their Google Calendar.
14. Select **Delete synced events** to let reps delete Google events and Salesforce events.
15. Select **Automatically relate Google events to Salesforce records** to relate important events to the appropriate Salesforce contacts or lead automatically.
16. Select **Include Google Meet details on Google events**. Then when reps create events in Salesforce, the details to join Google Meet virtual meetings are added to the Google version of the event after the event syncs from Salesforce to Google Calendar. Keep in mind that while this setting impacts Google Calendar events, Google Meet details never sync back to Salesforce.
17. Click **Save**.

Syncing has begun for reps in this Lightning Sync configuration.

## 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.

 **Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

### [Assign Reps to Lightning Sync Configurations](#)

After configuring server settings, Salesforce admins can assign reps to a Lightning Sync configuration to get contacts or events to start syncing. 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

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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

## Assign Reps to Lightning Sync Configurations

After configuring server settings, Salesforce admins can assign reps to a Lightning Sync configuration to get contacts or events to start syncing. Admins can assign individual reps or user profiles to add multiple users to configurations.

Before admins assign 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 isn't removed from either configuration. However, the user's records sync according to the configuration that lists the user individually.
- If you assign a user to one Lightning Sync configuration and one Salesforce for Outlook 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 *Sync* in the *Quick Find* box, then select **Outlook Integration and Sync** or **Google Integration and Sync**.
2. Click **Let users sync contacts, events, or both between Microsoft Exchange and Salesforce** or **Let users sync contacts, events, or both between Google and Salesforce**.
3. From the Set Sync Settings and Check Status section, click **Go to Config**.
4. 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.
5. In the Assign Users and Profiles section, select either *Profiles* or *Users* in the *Search* drop-down list.
6. If you don't see the member you want to add, enter keywords in the search box and click **Find**.
7. 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.
8. To remove members, select those members and click **Remove**.
9. Click **Save**.

SEE ALSO:

[How Salesforce Manages Sync Conflicts Between Products](#)

[Lightning Sync Considerations for Companies With Multiple Salesforce Organizations](#)

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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 view Lightning Sync configurations:

- View Setup and Configuration

To create, edit, or delete Lightning Sync configurations:

- Manage Users  
AND  
Manage Lightning Sync

## 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.

### [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.

#### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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

## 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 **Gmail Integration 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

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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 statuses:

- Manage Users
- AND
- Manage Lightning Sync

## 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

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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 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 rep's `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.
  -  **Note:** Contact sync doesn't support Outlook categories, so contacts labeled with a `Salesforce_Sync` category that don't exist in a contacts subfolder of the same name don't sync with Salesforce. To avoid this issue, disable contact categories and select the `Salesforce_Sync` folder for new contacts in Outlook. See [EAC - New Contacts Created In Outlook with 'Salesforce\\_Sync' Category Do Not Sync to Salesforce](#).
  - 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.

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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 rest sync:

- Manage Users
- AND
- Manage Lightning 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](#)

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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 Microsoft Remote Connectivity Analyzer:

- Administrative access to your company's Microsoft® Exchange server

To run the Lightning Sync connection test:

- Manage Users
- AND
- Manage Lightning Sync

## 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.

### Example:

 **Note:** Contact sync doesn't support Outlook categories, so contacts labeled with a Salesforce\_Sync category that don't exist in a contacts subfolder of the same name don't sync with Salesforce. To avoid this issue, disable contact categories and select the Salesforce\_Sync folder for new contacts in Outlook. See [EAC - New Contacts Created In Outlook with 'Salesforce\\_Sync' Category Do Not Sync to Salesforce](#).

### System Statuses

**Table 7: Configuration Setup Statuses**

If	Provides this status	This status means that
Microsoft Exchange service account provided:	<i>Your Service Account User Name</i>	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.
Outlook integration enabled:	Yes	You've enabled the Outlook integration in Setup. If you've set up sales reps to select which Microsoft events sync to Salesforce, reps select events using the Outlook integration.
	No	You haven't enabled the Outlook integration in Setup. If

### EDITIONS

Available to sync records from: Salesforce Classic, Lightning Experience, and the Salesforce mobile 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	Provides this status	This status means that
		you've set up sales reps to select which Microsoft events sync to Salesforce, reps can't select events until you've enabled the Outlook integration.
Salesforce recognizes Microsoft Exchange service account:		Lightning Sync recognizes the service account that you 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 8: 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.

If	Provides this status	This status means that
	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 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

If	Provides this status	This status means that
		working, contact Salesforce Customer Support.

Table 9: 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

If	Provides this status	This status means that
		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 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 10: 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.

<b>If</b>	<b>Provides this status</b>	<b>This status means that</b>
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.
User set up Outlook integration:	Yes	This sales rep has set up the Outlook integration. If you've set up reps to select which Microsoft events sync to Salesforce, reps select events using the Outlook integration.
	No	This sales rep hasn't set up the Outlook integration. If you've set up reps to select which Microsoft events sync to Salesforce, reps can't select events until they've set up the Outlook integration.

**Table 11: Contacts Statuses**

<b>If</b>	<b>Provides this status</b>	<b>This status means that</b>
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.

<b>If</b>	<b>Provides this status</b>	<b>This status means that</b>
	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.
	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 to 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 12: Event Statuses

<b>If</b>	<b>Provides this status</b>	<b>This status means that</b>
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.

If	Provides this status	This status means that
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.
	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 to 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,

If	Provides this status	This status means that
		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 <code>private</code> option to the event. Also remember that at this time, Lightning Sync doesn't sync recurring events or invitees on events.

## Email Application Publisher Layouts

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

**!** **Important:** Starting in Summer '21, the action menu is no longer available in the Salesforce for Outlook side panel. To let reps create records from Outlook, migrate your users to the Outlook Integration. See [Salesforce for Outlook Retirement](#).

You can set up action menus for reps working from Outlook integration and Gmail integration.

### EDITIONS

Outlook integration and Gmail integration 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

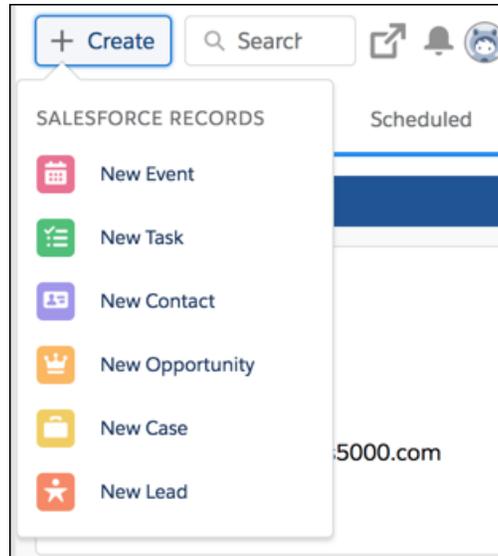
### USER PERMISSIONS

To create actions, customize, and assign email application action menus:

- Customize Application

To view email application publisher layouts:

- View Setup and Configuration



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 the global publisher layout. These actions display for all action menus that use the global publisher layout. However, reps see only `Create a Record` actions from their email applications.

 **Note:** Salesforce includes a `Log a Call` quick action that is available to add to a Global Publisher Layout, but isn't available in the Outlook or Gmail integrations. To add an action to log a call from Outlook and Gmail, create a quick action with `Action Type` set to **Create a Record** and `Target Object` set to **Task**.

If you're working from Enterprise, Performance, Unlimited, or Developer Edition, you can 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 Quick Actions for the Salesforce Side Panel Action Menu](#)

Take the first step in preparing your Outlook integration and Gmail integration users to create records directly from Outlook or Gmail. The Salesforce side panel action menu lets users create accounts, cases, contacts, leads, opportunities, or custom object records without opening Salesforce. You choose which actions appear in users' action menus by creating global `Create a Record` actions for each kind of record.

#### [Customize Email Application Action Menus](#)

Take the second step in preparing reps to create records directly from the Outlook integration or the Gmail integration. 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:

[Create Salesforce Records from Outlook and Gmail](#)

## Create Quick Actions for the Salesforce Side Panel Action Menu

Take the first step in preparing your Outlook integration and Gmail integration users to create records directly from Outlook or Gmail. The Salesforce side panel action menu lets users create accounts, cases, contacts, leads, opportunities, or custom object records without opening Salesforce. You choose which actions appear in users' action menus by creating global Create a Record actions for each kind of record.

 **Important:** Starting in Summer '21, the action menu is no longer available in the Salesforce for Outlook side panel. To let reps create records from Outlook, migrate your users to the Outlook Integration. See [Salesforce for Outlook Retirement](#).

You can use global actions for several types of action menus found in Salesforce, such as the menus on the Home page and the Chatter tab. If you already set up global Create a Record actions for records you want available to your users, there's no need to set up the actions again. The global actions are already available to add to any publisher layouts.

1. 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 action 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 assigned to this action have access to that record type.
5. Enter a label for the new action that tells your users what it does.
6. Save the new action.
7. From the Action Layout Editor, drag the fields you want to appear on the action menu.  
If any of the fields are required for the type of record anywhere in Salesforce, make sure to include the fields in the global action. If the required fields aren't included in the record detail, Salesforce doesn't let users save records. Required fields are displayed in the action layout editor with a red asterisk.
8. After creating Create a Record actions, add the global actions to the appropriate publisher layout.

### EDITIONS

Outlook integration and Gmail integration 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 set up global quick actions:

- [Customize Application](#)

To display the Salesforce Side Panel:

- [Side Panel in Outlook and Gmail configurations](#)

If you're working from Contact Manager, Group, or Professional Edition, 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 email application publisher layouts.

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 the Outlook integration or the Gmail integration. You can create multiple layouts to give different reps access to different actions.

**!** **Important:** Starting in Summer '21, the action menu is no longer available in the Salesforce for Outlook side panel. To let reps create records from Outlook, migrate your users to the Outlook Integration. See [Salesforce for Outlook Retirement](#).

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 customize the action menu 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 create contacts, leads, and opportunities, but your service reps 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 Outlook Integration or Gmail Integration 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 with 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

Outlook integration and Gmail integration 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

## 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.

**!** **Important:** Starting in Summer '21, the action menu is no longer available in the Salesforce for Outlook side panel. To let reps create records from Outlook, migrate your users to the Outlook Integration. See [Salesforce for Outlook Retirement](#).

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.

1. From Setup, use the **Quick Find** box to search for settings for your email integration feature. Search for Outlook Integration or Gmail integration for those features.
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 dropdown, select the layout that you want to assign to the profile.
5. Click **Save**.

## My Unresolved Items

Einstein Activity Capture, Lightning Sync, Salesforce for Outlook (Retiring), and Email to Salesforce let you integrate the work you do from your email and calendar applications with Salesforce. Microsoft or Google items that aren't automatically associated with Salesforce records appear in My Unresolved Items. Sales reps can review the unresolved items and associate them manually.

As part of your daily routine, use the My Unresolved Items page to manage unresolved items.

Recurring events or event series don't appear on the My Unresolved Items page. To associate a recurring event or event series with Salesforce records, go to the event in your Salesforce calendar.

If you use Einstein Activity Capture, emails don't appear on the My Unresolved Items page.

### EDITIONS

Outlook integration and Gmail integration 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

### EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: **All Editions**

- In Salesforce Classic, you can access your unresolved items from the sidebar shortcut **Unresolved Items**. In Lightning Experience, click your profile picture, and then click **Settings**. Enter *Email* in the Quick Find box, and then select **My Unresolved Items**.
- To review unassigned items by type, select a tab.
- View your unassigned items.
- Assign your items to Salesforce records manually or using Salesforce recommendations. If you don't want to assign an item to a record, select **Don't Assign**. Unassigned items aren't linked to other records and are visible to you only.

## Use Features that Make Resolving Items Easy

Use the Batch Edit and Recommendations features to resolve items quickly and easily.

Goal	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.
Find related accounts, cases, and opportunities	Recommendations	<p>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 <b>Turn off Recommendations</b>. If you change your mind, click <b>Turn on Recommendations</b>.</p> <p>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.</p> <ul style="list-style-type: none"> <li>• <b>Accounts:</b> The contact has either an account as the parent, or a contact role in the account.</li> <li>• <b>Cases:</b> The contact is related to the case.</li> <li>• <b>Opportunities:</b> The contact has a contact role in the opportunity.</li> </ul>

### Resolve Your Synced Contacts

When contacts sync from your email app with Einstein Activity Capture, Lightning Sync, or Salesforce for Outlook, 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.

### Resolve Your Synced Events

When non-recurring events sync from your email app with Einstein Activity Capture, Lightning Sync, or Salesforce for Outlook, 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.

### Resolve 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.

#### SEE ALSO:

[Resolve Your Synced Outlook Tasks](#)

[Resolve Your Synced Contacts](#)

[Resolve Your Synced Events](#)

## Resolve Your Synced Contacts

When contacts sync from your email app with Einstein Activity Capture, Lightning Sync, or Salesforce for Outlook, 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. In Salesforce Classic, access your unresolved events from the sidebar shortcut **Unresolved Items**. In Lightning Experience, click your profile picture, then click **Settings > Email > My Unresolved Items**.
2. Resolve each contact in any of these ways.
  - Assign an account.
    - Select an account under Choose Suggested Account in the dropdown 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 don'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 need to first allow popups from Salesforce.
  - Leave unassigned—Select `Don't Assign New Account` from the dropdown list if you want to confirm that a contact with no account remains 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 dropdown 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.

#### EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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 accounts:

- Edit on contacts and Create on accounts
- AND
- Show Quick Create

- Cancel a selection—Select *None Selected*— from the dropdown list.
3. Click **Save** to save your changes. All modified items are removed from the list. Remaining items continue to sync, and you can return anytime 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.

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 \(Retiring\)](#)

## Resolve Your Synced Events

When non-recurring events sync from your email app with Einstein Activity Capture, Lightning Sync, or Salesforce for Outlook, 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:** From the My Unresolved Items page, you can't resolve recurring events (repeating events created in Salesforce Classic, which only sync if you're using Salesforce for Outlook) or event series (repeating events created in Lightning Experience or the Salesforce mobile app, which only sync using Lightning Sync or Einstein Activity Capture). Instead, go directly to the repeating events in your calendar to associate the events with Salesforce records.
  - 📌 **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.
1. In Salesforce Classic, access your unresolved events from the sidebar shortcut **Unresolved Items**. In Lightning Experience, click your profile picture, then click **Settings > Email > My 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 dropdown 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 anytime to resolve them. Clicking **Cancel** cancels all changes on the page. The event is added to the associated record's Activity History or Open

### EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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

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.

## SEE ALSO:

[My Unresolved Items](#)

[How Events Sync with Salesforce for Outlook \(Retiring\)](#)

## Resolve 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.

 **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.

1. In Salesforce Classic, access your unresolved events from the sidebar shortcut **Unresolved Items**. In Lightning Experience, click your profile picture, then click **Settings > Email > My 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 dropdown 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 anytime 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.

## SEE ALSO:

[My Unresolved Items](#)

[How Tasks Sync with Salesforce for Outlook \(Retiring\)](#)

### EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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 (Retiring)

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.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

Watch a Demo: [Get Started with Salesforce for Outlook](#) (English only)

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're 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.

### EDITIONS

Available in: Salesforce Classic (**not available in all orgs**)

Available in: Lightning Experience, if **Salesforce Classic is available in your org**.

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**



For a start-to-finish Salesforce for Outlook setup guide, see [Getting Microsoft® Outlook® and Salesforce in Sync](#).

[Get Started with Salesforce for Outlook](#)

### [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#)

To help your sales reps continue syncing and working between Salesforce and Microsoft Outlook, learn about moving to the Outlook integration and Einstein Activity Capture.

### [Salesforce for Outlook \(Retiring\) Supported Languages](#)

Salesforce for Outlook supports these languages.

### [Salesforce for Outlook \(Retiring\) System Requirements](#)

Your computing environment must meet these system requirements to install and use Salesforce for Outlook.

### [View and Work with Salesforce for Outlook \(Retiring\) 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. View and Work with Salesforce Records from Microsoft® Outlook®.

### [Syncing Between Salesforce for Outlook \(Retiring\) and Microsoft® Outlook®](#)

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 \(Retiring\)](#)

If you track cases in Salesforce, you can create ones from your Microsoft® Outlook® emails. Your administrator needs to first create Email-to-Case destinations that appear in the dropdown list 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.

### [Salesforce for Outlook \(Retiring\) 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.

### [Set Up Salesforce for Outlook on Your Desktop \(Retiring\)](#)

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 for Outlook \(Retiring\)](#)

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 want to sync, or syncing all your items, and selecting the items you want to prevent from syncing.

### [Access Salesforce for Outlook Settings and Tools \(Retiring\)](#)

Access Salesforce for Outlook settings and tools through the system tray application.

### [Salesforce for Outlook \(Retiring\) FAQ](#)

Find answers to frequently asked questions about Salesforce for Outlook.

#### SEE ALSO:

[Salesforce for Outlook \(Retiring\) System Requirements](#)

[Download the Salesforce for Outlook \(Retiring\) Installer](#)

[Install and Set Up Salesforce for Outlook \(Retiring\)](#)

[Syncing Between Salesforce for Outlook \(Retiring\) and Microsoft® Outlook®](#)

## Move from Salesforce for Outlook (Retiring) to the Next-Generation Products

To help your sales reps continue syncing and working between Salesforce and Microsoft Outlook, learn about moving to the Outlook integration and Einstein Activity Capture.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

1. [Salesforce for Outlook Is Retiring](#)

Salesforce for Outlook has been helping reps stay productive for a long time. Learn about retirement details and your options for integrating Microsoft Outlook with Salesforce after retirement.

2. [Prepare for Salesforce for Outlook Retirement](#)

If you're thinking about moving to a replacement product, retain important details before you lose access to them. That way, you can provide a smoother migration experience for your sales reps and avoid any migration issues with sync.

3. [Prepare for the Move From Salesforce to Outlook to a Replacement Product](#)

As you prepare for feature retirement of Salesforce for Outlook, you can start preparing for your move to a replacement product. First we introduce you to the next-generation products offered by Salesforce, including a high-level comparison with Salesforce for Outlook. Then we help you sort through other considerations to decide which products are right for your company.

4. [Test Your Next-Generation Product Rollout](#)

When you've followed all the pre-rollout steps, you're ready to test your Outlook Integration and Einstein Activity Capture rollouts. Follow these steps to get started. And remember, we encourage you to run your tests in sandbox, or with a small group of test users.

5. [Roll Out the Next-Generation Products in Production](#)

When you finish testing, get feedback from your testers and revise your rollout plan. If you must, repeat testing multiple times, updating your plan each time to work out all of the snags. Then, when you're ready, follow the remaining steps below. When you're done, return to your rollout plan, and repeat the rollout again--this time in production.

6. [Reference Considerations for Moving from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#)

Before you move from Salesforce for Outlook to the Outlook integration and Einstein Activity Capture, get up to speed on these product differences. Salesforce for Outlook is scheduled for full retirement in June 2024.

## Salesforce for Outlook Is Retiring

Salesforce for Outlook has been helping reps stay productive for a long time. Learn about retirement details and your options for integrating Microsoft Outlook with Salesforce after retirement.

With the release of Summer '21, the Salesforce for Outlook side panel action menu is no longer available for users to create Salesforce records from the side panel in Outlook.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

### Next Steps for Salesforce for Outlook Customers

We're here to help you prepare for retirement, decide which products you want to move to, and plan and execute your move.

Salesforce has made key advancements on our next-generation Microsoft integration products: the Outlook Integration and Einstein Activity Capture. These products not only replace Salesforce for Outlook, but also deliver solutions in areas where customers have reported that Salesforce for Outlook falls short.

To learn about the benefits offered by the next-generation products as well as the support and feature differences, see [Explore Our Latest Microsoft Integration Products](#) on page 606. And because customers' needs have evolved over time, Outlook Integration and Einstein Activity Capture don't support the same systems and features as Salesforce for Outlook.

If our next-generation products don't provide what you need today, remember that we continue to develop Outlook Integration and Einstein Activity Capture to meet the needs of customers. Check the [Salesforce Release Notes](#) each release to learn whether the enhancement you want has been delivered. Or consider exploring one of the third-party solutions available on [AppExchange](#).

### Prepare for Salesforce for Outlook Retirement

If you're thinking about moving to a replacement product, retain important details before you lose access to them. That way, you can provide a smoother migration experience for your sales reps and avoid any migration issues with sync.

With the Summer '21 release, the side panel action menu is no longer be available for users.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

Here's how you can get ready for the phased retirement.

### Review Migration Documentation Early

We recommend starting your preparation early. Although most product changes don't occur until after the full product is retired in June 2024, it's a good idea to review recommendations and take some initial steps before the action menu is retired in Summer '21.

Plus, if you plan on migrating to a replacement product, avoid surprises by familiarizing yourself with the complete migration process right away. Review our migration advice even if you meet one of the following scenarios.

- You plan to finish rolling out a replacement product after the full Salesforce for Outlook product retirement in 2024.

#### EDITIONS

Outlook integration is available in Salesforce Classic and Lightning Experience in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Einstein Activity Capture is available in Lightning Experience and all versions of the Salesforce mobile app in **Essentials, Professional, Enterprise, Performance,** and **Unlimited** Editions

Salesforce for Outlook is available in Salesforce Classic and Lightning Experience in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

- You can choose to roll out a third-party AppExchange offering rather than one of our next-generation products.

## See Who's Using Salesforce for Outlook

Before Summer '21, get a list of who's using the product, so that you know which sales reps are impacted by the retirement.

From Salesforce Setup, refer to the [Salesforce for Outlook login history](#). Export a .csv file to see who's logged in over the last 6 months. This report includes two types of users.

- Users who were given access to Salesforce for Outlook by an admin at your company through an Outlook configuration.
- Users who downloaded Salesforce for Outlook on their own and have used the [default Outlook configuration](#) to access features.

Depending on the size of your company, your bandwidth to manage a rollout, and your knowledge of your reps' work cycle, it's possible that reps who show up in the report are likely the only active users. In that case, you can focus on migrating those users only.

However, if you're concerned that some reps still expect to use Salesforce for Outlook despite their 6-month absence, review users who are assigned to Outlook configurations. Reps in Outlook configurations were manually given access to Salesforce for Outlook by you or another admin at your company from Salesforce Setup. To locate Outlook configurations, see [Assign Users to Salesforce for Outlook Configurations](#).

Comparing reps assigned to Outlook configurations with reps on the history report helps you to understand these usage considerations.

- Which users were working with Salesforce for Outlook recently
- Which users have used Salesforce for Outlook in the past and still can periodically
- Which reps are using Salesforce for Outlook without your knowledge
- What features and settings reps are using, including admin-configured settings, user-defined settings, and default configuration settings

Note any reps who appear to be working from the default Outlook configurations. Doing so helps you remember to check in later with those reps about which settings and features they're working with to prepare reps for rollout.

## Announce the Summer '21 Removal of the Side Panel Action Menu

If you aren't planning on migrating to the next-generation products before the action menu is removed in Summer '21, announce the change to your Salesforce for Outlook users. Communicate the expected user experience and suggested workaround. See [Salesforce for Outlook Retirement](#).

## Retain Salesforce for Outlook Configuration Details

Before June 2024, retain notes on your sales reps' current user experience. That way, when Outlook configurations are no longer available, you still have setting and user assignment details. Saving setting and user assignment details prepares you to mimic a similar user experience when you roll out the replacement products. Plus, it helps you avoid introducing sync issues.

Check your reps' Outlook configurations, and note which features and settings are enabled. If all Salesforce for Outlook users are assigned to the same settings, you don't have to track the reps assigned to each configuration. Track assigned users in these cases.

- You have multiple Outlook configurations that you use to assign different features and settings to different reps.
- You assigned Salesforce for Outlook to only a subset of your Salesforce users.

To get started quickly, consider using our [Salesforce for Outlook Migration Worksheets](#) to take your notes. The worksheets become a useful planning resource you can update and refer to throughout your rollout.

- 📌 **Note:** To work with the [Salesforce for Outlook Migration Worksheets](#), click the link, and then copy and paste the sheets into a new Quip document. Or use another application that edits spreadsheets, such as Microsoft Excel or Google Sheets. After you copy and paste each sheet into your own spreadsheet, make it your own. Track notes and progress to keep organized during your rollout. Plus, we give you advice about how to use it along the way.

To retain notes using the worksheets, start with the *Feature Usage Checklist* sheet.

- Track the enabled features and settings in the column labeled *Were you using this feature with Salesforce for Outlook?*
- Track which users or profiles are assigned to each configuration in the column labeled *Which Salesforce for Outlook users had access to this feature?.* Keep in mind that you must list out specific users or profiles here. If you write the name of the configuration only, you haven't retained the details you need when Salesforce for Outlook retires.

If you prefer not to use the worksheets, take screenshots or notes of configurations to record enabled settings and user or profile assignments. If you take screenshots, don't forget to expand or scroll through any collapsed or scrolling page sections, such as *Assigned Members* or *Edit Field Mappings*. Plus, don't forget to open your datasets and record your sync filters.

For a reminder about how to locate your Outlook configurations and what the settings do, see [Create Salesforce for Outlook Configurations](#). To view your datasets, see [Define Data Sets for Salesforce for Outlook](#).

## Prepare Your Sales Reps for Retirement

To avoid complaints from sales reps after feature retirement, before June 2024, let reps know about the changes expected after the full Salesforce for Outlook retirement. Assure reps that you plan to communicate next steps and progress, and request participation from them along the way. Throughout the guide, we specify some key communications milestones.

## Tell Reps Not to Remove Salesforce for Outlook Sync Categories

In addition to communicating the retirement date, before June 2024, give reps some important instructions about their Salesforce for Outlook sync categories.

With Salesforce for Outlook, reps indicated which contacts or events they wanted to sync using the Outlook categories *Sync with Salesforce* or *Don't Sync with Salesforce*. The categories reps used depend on how you configured reps to sync or whether you let them configure themselves to sync. See [Manage How Microsoft Outlook Items Sync with Salesforce](#) and [Create Salesforce for Outlook Configurations](#).

With Einstein Activity Capture, reps follow different steps to mark items to sync or not sync. Because it's a different user experience, migrating without some preparation from reps can introduce duplicate records into Salesforce or Outlook. Later, we explain how reps use the Outlook categories to prepare for migration before you roll out Einstein Activity Capture.

After Salesforce for Outlook is retired, even if you uninstall the client, the Outlook categories remain on reps' contacts and events. Make sure that reps know not to remove the Outlook categories from their contacts or events, even after Salesforce for Outlook stops working.

To see how to use Outlook Categories during rollout, see the [Prepare Reps for Contact Sync](#) section in *Things to Know Before Replacing Your Contact Sync Product*.

## Ask Reps Which Outlook Folder They're Syncing With

If you plan on migrating to a replacement sync product, before June 2024, ask reps to confirm which Outlook folders they're syncing with. Later, we explain how reps can use this information to prepare for migration to a replacement product. If reps aren't sure which Outlook folder they're syncing to, it's probably the default folder. In that case, reps don't need to do anything. However, they can check from Salesforce for Outlook Settings using the *Change Folder* button. See [Install and Set Up Salesforce for Outlook](#).

Reps don't have to worry about their task sync folder—our next-generation products don't sync tasks. But don't worry, some other task integration features are available.

## Prepare for the Move From Salesforce to Outlook to a Replacement Product

As you prepare for feature retirement of Salesforce for Outlook, you can start preparing for your move to a replacement product. First we introduce you to the next-generation products offered by Salesforce, including a high-level comparison with Salesforce for Outlook. Then we help you sort through other considerations to decide which products are right for your company.

1. [Explore Our Latest Microsoft Integration Products](#)

As you start your plan to replace Salesforce for Outlook, which is retiring, consider our next generation of Microsoft integration products: the Outlook Integration and Einstein Activity Capture. For now, start getting acquainted with the next-generation products and the similarities and differences with Salesforce for Outlook. Consider whether you think your reps need features offered by both the Outlook Integration and Einstein Activity Capture, or just one of these products. In other topics, we help you sort through other considerations to decide whether the next-generation products are right for your company. For some customers, a third-party alternative from AppExchange is the best option.

2. [Verify That You Meet the Next-Generation Product Requirements](#)

After considering Outlook Integration and Einstein Activity Capture features to replace Salesforce for Outlook, which is retiring, verify that you meet product requirements. Review requirements for your reps' computing environments and your Salesforce editions and licenses. Meet with your Microsoft Exchange or IT admin and the person at your company who manages your Salesforce account, if that's not you.

3. [Verify That the Next-Generation Products Meet Your Security Requirements](#)

Salesforce takes your data security seriously. Our Microsoft Integration products apply stringent Salesforce security measures when establishing a connection with your email service. But for companies in highly regulated industries, your Exchange or IT admins can require an extra security review.

4. [Choose Which Next-Generation Products You Want to Roll Out](#)

After getting to know the products and verifying that requirements are met, it's time to decide which products to roll out.

5. [Start Your Migration and Test Plan](#)

A successful product rollout starts with a solid plan. To avoid issues like duplicated data or missing records for sync, follow these guidelines for planning your Salesforce for Outlook migration.

6. [Review Things to Know Before Rolling Out Replacement Products](#)

Before you start your move from Salesforce for Outlook to a replacement product or products, review these migration considerations and follow our recommended rollout guidelines.

## Explore Our Latest Microsoft Integration Products

As you start your plan to replace Salesforce for Outlook, which is retiring, consider our next generation of Microsoft integration products: the Outlook Integration and Einstein Activity Capture. For now, start getting acquainted with the next-generation products and the similarities and differences with Salesforce for Outlook. Consider whether you think your reps need features offered by both the Outlook Integration and Einstein Activity Capture, or just one of these products. In other topics, we help you sort through other considerations to decide whether the next-generation products are right for your company. For some customers, a third-party alternative from AppExchange is the best option.

### [Learn about the Next-Generation Microsoft Integration Products](#)

Get ready to move your sales reps to our cloud-based products: the Outlook integration and Einstein Activity Capture. What's the benefit of cloud-based products? You avoid the complicated, manual software upgrades that come with Salesforce for Outlook, which is retiring. That's because sales reps and Salesforce admins automatically get the latest product updates with each Salesforce release. Plus, they get the latest and greatest of our Microsoft integration features.

### [Compare Salesforce for Outlook \(Retiring\) with the Next Generation Products](#)

Check out a high-level comparison of Salesforce for Outlook to the next-generation products, the Outlook Integration and Einstein Activity Capture.

## Learn about the Next-Generation Microsoft Integration Products

Get ready to move your sales reps to our cloud-based products: the Outlook integration and Einstein Activity Capture. What's the benefit of cloud-based products? You avoid the complicated, manual software upgrades that come with Salesforce for Outlook, which is retiring. That's because sales reps and Salesforce admins automatically get the latest product updates with each Salesforce release. Plus, they get the latest and greatest of our Microsoft integration features.

**Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

Depending on your business needs and the system requirements you meet, you can set up Outlook integration and Einstein Activity Capture together or separately.

Keep reading to learn more about how the next-generation features replace Salesforce for Outlook.

### Replace the Salesforce for Outlook Side Panel with the Outlook Integration

Similar to the Salesforce for Outlook side panel, the Outlook integration lets reps work with Salesforce records and certain Salesforce features while in their Outlook email or calendar. The Outlook integration also offers productivity features that aren't available from the Salesforce for Outlook side panel.

- Sales reps can log Outlook emails to Salesforce as emails and as tasks.
- Customers who have turned on Lightning Experience can build customized Outlook integration panes for different users. You can add Lightning components to the pane, including components available from AppExchange.
- Sales reps can draft Outlook emails using Salesforce templates.
- If you purchase licenses for Inbox, sales reps can access even more Salesforce productivity features in Outlook. Inbox gives reps email tracking, insert availability, text shortcuts, and email scheduling. From Outlook, reps see suggestions to log relevant records based on custom objects. See [Outlook and Gmail Integration and Inbox Features](#).

To learn more about Outlook integration features, see [Outlook and Gmail Integration Tour](#) and [View and Work with Salesforce Data in Outlook and Gmail](#).

### Replace Salesforce for Outlook Sync with Einstein Activity Capture

Einstein Activity Capture syncs contacts and events between Outlook and Salesforce. Plus, it offers new productivity-boosting features for sales reps and setup improvements for you.

- Email and event capture automatically shows Outlook emails and events in the activity timeline of related Salesforce records. And updates to those Outlook emails and events are captured automatically. No more manual logging.
- Einstein Email Insights, which gives sales reps critical sales context to relevant emails, appear alongside captured emails in the activity timeline.

## EDITIONS

Outlook integration is available in Salesforce Classic and Lightning Experience in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Einstein Activity Capture is available in Lightning Experience and all versions of the Salesforce mobile app in **Essentials, Professional, Enterprise, Performance, and Unlimited** Editions

Salesforce for Outlook is available in Salesforce Classic and Lightning Experience in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

- Activity Metrics let reps see a summary of sales activity from list views, page layouts, and reports. You can also use Activity Metrics fields to automate processes with Process Builder and triggers. If you have Standard Einstein Activity Capture, Activity Metrics isn't available. See [What Is Einstein Activity Capture Standard?](#)

For more information about Einstein Activity Capture, see [What Does Einstein Activity Capture Do?](#).

### See More Resources for Comparing the Next-Generation Products

To help you choose the best products for your reps and start planning your move, check out these resources.

- [Design Your Perfect Salesforce Email Integration](#)
- [Learn about the Support Differences Between Salesforce for Outlook \(Retiring\) and the Next-Generation Products](#)
- [Learn about the Feature Differences Between Salesforce for Outlook \(Retiring\) and the Next-Generation Products](#)

SEE ALSO:

[Design Your Perfect Salesforce Email Integration](#)

Compare Salesforce for Outlook (Retiring) with the Next Generation Products

Check out a high-level comparison of Salesforce for Outlook to the next-generation products, the Outlook Integration and Einstein Activity Capture.

**!** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

For now, use this at-a-glance comparison to start thinking about your move to the next-generation products.

Keep in mind that we continue to introduce enhancements to the Outlook Integration and Einstein Activity Capture every release. Keep an eye on the [Salesforce Release Notes](#) to see when enhancements become available. If the support you need isn't provided by our replacement products, consider reviewing third-party alternatives available from [AppExchange](#).

When you're ready to get a deeper understanding of the differences, review our detailed product comparisons. Later, we show you how to use these comparisons to narrow down which products are best for your sales teams.

- [Learn about the Support Differences Between Salesforce for Outlook \(Retiring\) and the Next-Generation Products](#)
- [Learn about the Feature Differences Between Salesforce for Outlook \(Retiring\) and the Next-Generation Products](#)

Product Detail	Salesforce for Outlook	Outlook Integration and Einstein Activity Capture
Supports older versions of Microsoft Outlook (Outlook 2010 and earlier)	✔	✘
Supports all Salesforce editions	✘	✘

### EDITIONS

Outlook integration is available in Salesforce Classic and Lightning Experience in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Einstein Activity Capture is available in Lightning Experience and all versions of the Salesforce mobile app in **Essentials, Professional, Enterprise, Performance, and Unlimited** Editions

Salesforce for Outlook is available in Salesforce Classic and Lightning Experience in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Product Detail	Salesforce for Outlook	Outlook Integration and Einstein Activity Capture
Supports Lightning Experience	 Only if the user can move between Lightning Experience and Salesforce Classic using the switcher.	
Supports Salesforce Classic		 Outlook Integration only.
Supports Salesforce Mobile App	 Sync only	 Einstein Activity Capture only.
Supported with Sales and Service Cloud purchases		 Outlook Integration only.
Supports more than 100 users		 Outlook Integration only. Paid upgrade required for setting up more than 100 users on Einstein Activity Capture.
Supports sync for customers with both Exchange Online and on-premises Exchange used simultaneously (also known as a "hybrid" configuration)		 Available for capture functionality with Einstein Activity Capture only; no support for sync functionality.
Customer can control which users' email accounts Salesforce has access to		
A side panel that lets users access Salesforce features from Outlook		 Outlook Integration only.
Contact and event sync		 Einstein Activity Capture only.
Repeating event sync	 Salesforce Classic only. <a href="#">Learn more</a>	 Lightning Experience and Salesforce app with Einstein Activity Capture only. <a href="#">Learn more</a>
Task sync		 Though with Outlook Integration, reps can work with Salesforce tasks directly from Outlook.

Product Detail	Salesforce for Outlook	Outlook Integration and Einstein Activity Capture
Manually add Outlook email, contacts, and events to Salesforce	✓	✓ Outlook Integration only.
Automatically add Outlook email and events to Salesforce	✗	✓ Einstein Activity Capture only.
Custom field sync	✓	✗
Customize mappings for standard fields	✓	✓
Contact sync filters	✓	✓ Einstein Activity Capture only, with limitations.
Event sync filters	✓	✓ Einstein Activity Capture only, with limitations.
Remove deleted contacts from the other application automatically	✓	✗
Remove deleted events from the other application automatically	✓	✓ Einstein Activity Capture only.
Sync event attachments	✓	✗

## Verify That You Meet the Next-Generation Product Requirements

After considering Outlook Integration and Einstein Activity Capture features to replace Salesforce for Outlook, which is retiring, verify that you meet product requirements. Review requirements for your reps' computing environments and your Salesforce editions and licenses. Meet with your Microsoft Exchange or IT admin and the person at your company who manages your Salesforce account, if that's not you.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

Use the *Setup Req. Checklist* sheet you copied from the [Salesforce for Outlook Migration Worksheets](#) to take notes on setup requirements. Track requirements that you and your IT admin must address or any that you can't meet.

 **Note:** To work with the [Salesforce for Outlook Migration Worksheets](#), click the link, and then copy and paste the sheets into a new Quip document. Or use another application that edits spreadsheets, such as Microsoft Excel or Google Sheets. After you copy and paste each sheet into your own spreadsheet, make it your own. Track notes and progress to keep organized during your rollout. Plus, we give you advice about how to use it along the way.

1. Meet with your Microsoft Exchange or IT admin and review the resources listed in steps a, b, and c. Confirm that your reps' computing environments and your Exchange server configuration support the next-generation products.
  - a. Check whether you meet the basic system requirements by using our interactive decision-making site, [Design Your Perfect Salesforce Email Integration](#).
  - b. If you can narrow your options using the site, verify that you meet the complete system requirements too. See [Outlook Integration System Requirements](#) and [Einstein Activity Capture System Requirements](#).
  - c. If changes to your server are needed, discuss with your Exchange or IT admin whether it's possible to update your reps' computing environments to meet system requirements. Establish a timeline for implementing changes. If using the migration worksheets, track action items on the *Setup Req. Checklist* sheet.
2. Review the Salesforce edition and license requirements described in [Learn About the Support Differences Between Salesforce for Outlook and the Next Generation Products](#). Confirm that you meet Salesforce subscription requirements also. Work with the person at your company who manages your Salesforce account, or reach out to your Salesforce contact.
3. Plan for any required changes. If using the migration worksheets, track action items on the *Setup Req. Checklist* sheet.

If you can't adjust your computing environment, Exchange server configuration, or Salesforce subscription to meet product requirements, you have other options. Remember that we continue to develop Outlook Integration and Einstein Activity Capture to meet your needs. Check the [Salesforce release notes](#) each release to learn whether the enhancement you want was delivered. Or, explore the third-party solutions available on [AppExchange](#).

### EDITIONS

Outlook integration is available in Salesforce Classic and Lightning Experience in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

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Salesforce for Outlook is available in Salesforce Classic and Lightning Experience in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## Verify That the Next-Generation Products Meet Your Security Requirements

Salesforce takes your data security seriously. Our Microsoft Integration products apply stringent Salesforce security measures when establishing a connection with your email service. But for companies in highly regulated industries, your Exchange or IT admins can require an extra security review.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

If your company requires an extra security review, share these security guides with them. Then schedule a follow-up conversation to confirm whether any discoveries dictate specific rollout requirements on your part.

- [Outlook Integration Security Guide](#)
- [Einstein Activity Capture Security Guide](#)

If a next-generation product doesn't meet your company's security review, remember that some options are available. To avoid engaging with parts of the products that don't comply with your requirements, you can avoid some features or setup methods.

Note any security concerns on the *Feature Usage Checklist* or *Setup Req. Checklist* sheet you copied from the [Salesforce for Outlook Migration Worksheets](#). Doing so can help you to track any related action items or flag an item of concern. To track more details, add columns or rows.

 **Note:** To work with the [Salesforce for Outlook Migration Worksheets](#), click the link, and then copy and paste the sheets into a new Quip document. Or use another application that edits spreadsheets, such as Microsoft Excel or Google Sheets. After you copy and paste each sheet into your own spreadsheet, make it your own. Track notes and progress to keep organized during your rollout. Plus, we give you advice about how to use it along the way.

Also, remember that we continue to develop Outlook Integration and Einstein Activity Capture to meet your needs. Check the [Salesforce release notes](#) each release to learn whether a security enhancement was delivered. Or explore the third-party solutions available on [AppExchange](#).

## Choose Which Next-Generation Products You Want to Roll Out

After getting to know the products and verifying that requirements are met, it's time to decide which products to roll out.

1. [Itemize Replacement Features That You Want to Roll Out](#)  
To assist you throughout your rollout, start comparing the list of features you were using to the list of next-generation features available to you. Then, assess the differences.
2. [Itemize the Rollout Considerations and Guidelines That Impact You](#)  
To prevent surprises during your rollout, we prepared a list of considerations and guidelines specifically for Salesforce for Outlook users. Follow these steps to itemize which considerations and guidelines impact you.

### Itemize Replacement Features That You Want to Roll Out

To assist you throughout your rollout, start comparing the list of features you were using to the list of next-generation features available to you. Then, assess the differences.

### EDITIONS

Outlook integration is available in Salesforce Classic and Lightning Experience in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

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Salesforce for Outlook is available in Salesforce Classic and Lightning Experience in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

**!** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

Building this list helps to coordinate these aspects of your rollout.

- Prepares you to mimic the experience reps had with Salesforce for Outlook as closely as possible.
- Helps you identify rollout guidelines that you are required to follow.
- Helps you track progress of individual migration steps.
- Prepares you to track differences on which to train your reps.

To get started quickly, consider using the *Feature Usage Checklist* sheet from the [Salesforce for Outlook Migration Worksheets](#) to take your notes.

**📄** **Note:** To work with the [Salesforce for Outlook Migration Worksheets](#), click the link, and then copy and paste the sheets into a new Quip document. Or use another application that edits spreadsheets, such as Microsoft Excel or Google Sheets. After you copy and paste each sheet into your own spreadsheet, make it your own. Track notes and progress to keep organized during your rollout. Plus, we give you advice about how to use it along the way.

Update these details on the Feature Usage Checklist sheet.

- Indicate which Salesforce for Outlook features or settings you were using and which users or profiles had access. See [Retain Salesforce for Outlook Configuration Details](#) on page 604.
- Spend some time using the *Feature Usage Checklist* to compare features 1:1 between Salesforce for Outlook and the next-generation products.

As you review 1:1 feature comparisons, use the spreadsheet to indicate which Outlook Integration or Einstein Activity Capture features you plan on rolling out. The Replacement product: Feature availability column describes key differences you must review and links to more details.

If you can't decide on a feature right now, flag the feature with the Considering option and revisit this feature later. In subsequent topics, we review more information that can help you finalize your decision.

- Add any follow-up or action items to the Admin notes column.

If you prefer not to use the migration worksheet, use these resources to create your own process for comparison.

- The notes we suggest that you take on your old Salesforce for Outlook configurations. See [Retain Salesforce for Outlook Configuration Details](#) on page 604.
- Our detailed list of next-generation feature differences. See [Learn about the Feature Differences Between Salesforce for Outlook \(Retiring\) and the Next-Generation Products](#) on page 647.

Confused about any of the differences described in the migration worksheet or Salesforce Help? Visit the [Outlook/Gmail Integration & Sync Trailblazer Community](#) and post your question. To make sure we update our resources, tag your question with #SFOmigrationguide.

### Itemize the Rollout Considerations and Guidelines That Impact You

To prevent surprises during your rollout, we prepared a list of considerations and guidelines specifically for Salesforce for Outlook users. Follow these steps to itemize which considerations and guidelines impact you.

**!** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

To get started quickly, pick up where you left off with the *Feature Usage Checklist* sheet you copied from the [Salesforce for Outlook Migration Worksheets](#).

 **Note:** To work with the [Salesforce for Outlook Migration Worksheets](#), click the link, and then copy and paste the sheets into a new Quip document. Or use another application that edits spreadsheets, such as Microsoft Excel or Google Sheets. After you copy and paste each sheet into your own spreadsheet, make it your own. Track notes and progress to keep organized during your rollout. Plus, we give you advice about how to use it along the way.

1. Locate our rollout considerations, [Review Things to Know Before Rolling Out Replacement Products](#) on page 616.
2. From your *Feature Usage Checklist* sheet, in the Are you rolling out a replacement feature? column, work through features you marked as Yes or Considering. Check the topics linked in the previous bullet for considerations related to each feature. Use the Admin Notes column to track any preparations that you must add to your rollout plan before preparing your test users.
3. After reviewing the topics linked in the first bullet, see if any of your outstanding questions were answered. Then update your rollout status on the feature from Considering to Yes or No.
4. If you're still undecided about a feature, see if the resources provided in the More Help column clear up any remaining questions. Or visit the [Outlook/Gmail Integration & Sync Trailblazer Community](#) and post your question. To make sure we update our resources, tag your question with #SFOmigrationguide.

## Start Your Migration and Test Plan

A successful product rollout starts with a solid plan. To avoid issues like duplicated data or missing records for sync, follow these guidelines for planning your Salesforce for Outlook migration.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

To catch any major issues before they impact your sales reps, we strongly encourage you to first attempt your rollout with a group of test users. Likewise, if your Salesforce edition includes access to sandbox staging environments, we recommend running your test in the sandbox first, rather than in production. That way, if you overlook any migration details, you avoid introducing errors to your live customer data.

Follow these steps to start your migration plan and prepare for testing. To build your plan, continue to use the [Salesforce for Outlook Migration Worksheets](#) introduced in previous preparation topics.

 **Note:** To work with the [Salesforce for Outlook Migration Worksheets](#), click the link, and then copy and paste the sheets into a new Quip document. Or use another application that edits spreadsheets, such as Microsoft Excel or Google Sheets. After you copy and paste each sheet into your own spreadsheet, make it your own. Track notes and progress to keep organized during your rollout. Plus, we give you advice about how to use it along the way.

Review Steps for Setting Up Outlook Integration and Einstein Activity Capture

Review product setup instructions with your Exchange or IT admin to get ahead of any technical roadblocks and start considering your rollout timeline.

Ask your IT admin to flag any technical preparation or concerns that you must address before you can move forward. Request timelines for completing action items. Track any notes for your rollout plan on the *Setup Step Checklist* sheet you copied from the migration worksheets. Feel free to add new columns or rows if you need them.

Check out these resources.

- For Outlook Integration, see [Roles Required to Set Up the Outlook Integration](#).

## EDITIONS

Outlook integration is available in Salesforce Classic and Lightning Experience in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Einstein Activity Capture is available in Lightning Experience and all versions of the Salesforce mobile app in **Essentials, Professional, Enterprise, Performance, and Unlimited** Editions

Salesforce for Outlook is available in Salesforce Classic and Lightning Experience in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

- For Einstein Activity Capture, see [Roll Out Einstein Activity Capture to Your Testers or Users](#).

Start Organizing Your Test Plan Chronologically

 **Note:** Though we encourage you to start your migration soon, it's possible to complete your rollout after the Salesforce for Outlook retirement. Review [Prepare for Salesforce for Outlook Retirement](#) to complete some important tasks before you lose access in 2024.

It's OK if you iterate on your test plan several times as you sort out the specifics of your rollout. We recommend organizing your plan into several broad phases, then supporting steps as you work through your notes and this guide. During each phase of your test plan, add steps about key items you must communicate to your sales reps and testers. Build time into your test plan timeline for those individuals to address assigned tasks. Send reminders along the way.

Here's an example.

1. Preparation: Using notes from the *Feature Usage Checklist* and *Setup Req. Checklist* worksheets, chronologically organize the pre-rollout steps you must complete before setup can begin. Include steps for you, your Microsoft or IT admin, and your sales reps.
2. Setup: Using notes from the *Setup Step Checklist* worksheet, chronologically organize the setup steps you must track. Include steps for you, your Microsoft or IT admin, and your sales reps.
3. Test Rollout: Using notes from the *Feature Usage Checklist* and *Setup Step Checklist* sheets, chronologically organize the steps you must complete during rollout. Include steps for you, your Microsoft or IT admin, and your sales reps.
4. Gathering Feedback: Compile a chronological list of steps you must complete to get testing feedback. Keep reading for ideas about more steps to add to this phase.

Select a Small Test group of Experienced Salesforce for Outlook Users

If you have Salesforce for Outlook users in different roles across your company (sales, service, management, and so forth), recruit testers from as many roles as possible. That way, you can test the unique workflows for each role. Try to pick users who get excited about Salesforce or are vocal about improving it. Include yourself in your test group, so that you have the context to quickly get in front of any issues that arise.

Prepare a Resource for Testers to Give Feedback Easily and Clearly

We recommend creating a resource that provides an easy way for testers to provide feedback, including notes and screenshots. For an example, see the *Testing Feedback* sheet in the [Salesforce for Outlook Migration Worksheets](#).

If you have the time and support, develop a list of common user workflows and split up the list among testers. Doing so lets you test a wide variety of tasks and ensures that real-life scenarios aren't missed. For ideas on how to develop a list of workflows, include issues from [Review Things to Know Before Rolling Out Replacement Products](#). You can also get ideas from a manager or someone in a sales operations role. Or even debrief some of your testers about how they commonly work with contacts, events, tasks, and the side panel.

Run a Test Rollout

If you have a sandbox, prepare it for testing and start to follow the steps in this guide to roll out the next-generation products. See [Trailhead: Get Early Access with the Sandbox Preview](#) and [Sandboxes: Staging Environments for Customizing and Testing](#).

Give Testers Access to Your Sandbox

When your test rollout is complete, give testers access to the sandbox and instruct testers to try out the new products. Share testing instructions, any workflows you want them to try, and your resource for gathering feedback. Remind testers to provide detailed, specific notes in their feedback.

Get Feedback and Revise Your Test Plan

If you can, schedule a meeting with testers and run through their feedback. Make sure that you understand their complaints and what testers expected. During the group discussion, testers are likely to remember feedback that they forgot to mention. After your meeting, update any product settings or rollout instructions.

If you must, repeat testing multiple times, updating your rollout plan each time to work out snags before rolling out to production.

### Add Production Rollout Phase to Your Plan

When you feel that you're ready for rollout, add a Production Rollout phase to your test plan. Include any remaining tasks described in [Roll Out the Next-Generation Products in Production](#). Then, using your rollout tests as an estimate, establish a tentative timeline for your production rollout. When you feel ready, communicate the tentative timeline to sales reps. Rolling out on a larger scale could take longer than your rollout tests, so plan accordingly. You can always adjust your tentative timeline and recommunicate it.

### Repeat Your Revised Rollout Plan in Production

Again, first start with your test users. Group by group, run through your finalized rollout plan, rolling out the product to more users until everyone has access.

If your planning and testing takes some time, remember to refer to the [Salesforce release notes](#) for updates that could impact your rollout plan. Likewise, we're adding improvements to our migration advice all the time. Rather than downloading a version of this guide as a PDF, use the live [HTML version](#) to make sure that you're getting the most up-to-date content.

## Review Things to Know Before Rolling Out Replacement Products

Before you start your move from Salesforce for Outlook to a replacement product or products, review these migration considerations and follow our recommended rollout guidelines.

### [Things to Know Before Replacing the Side Panel in Salesforce for Outlook \(Retiring\)](#)

If you're replacing the side panel with our next-generation product, you're setting up the Outlook Integration. Review these considerations and follow our recommended rollout guidelines.

### [Things to Know Before Rolling Out Einstein Activity Capture](#)

Unlike Salesforce for Outlook, Einstein Activity Capture offers email, event, and contact capture functionality as well as contact and event sync. Before you roll out the product to your users, learn about the differences between the two, and be aware of the considerations for capture.

### [General Things to Know Before Replacing Your Sync Product](#)

If you're replacing Salesforce for Outlook sync with our next-generation products, you're setting up Einstein Activity Capture. To avoid introducing duplicate records or missing items for sync, review these considerations before you start your migration and follow any recommended guidelines.

### [Things to Know Before Replacing Your Contact Sync Product](#)

Before you move from Salesforce for Outlook to Einstein Activity Capture, review these contact sync considerations and add suggested guidelines to your migration plan.

### [Things to Know Before Replacing Your Event Sync Product](#)

Before you move from Salesforce for Outlook to Einstein Activity Capture, review these event sync considerations and add suggested guidelines to your migration plan.

## Things to Know Before Replacing the Side Panel in Salesforce for Outlook (Retiring)

If you're replacing the side panel with our next-generation product, you're setting up the Outlook Integration. Review these considerations and follow our recommended rollout guidelines.

**!** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

### Create Salesforce Records from Outlook

Starting in Summer '21, the [action menu in the Salesforce for Outlook side panel](#) is unavailable. The action menu was the button in the side panel that let reps create Salesforce records directly from Outlook. To let reps create records from Outlook again, give them access to the Outlook integration. As with Salesforce for Outlook, you can create and assign Outlook integration action menus using [email application publisher layouts](#). If you already have email application publisher layouts assigned to Salesforce for Outlook users, these same layouts and assignments work for the Outlook Integration. During Outlook integration testing, ask your testers to verify that they can access the same actions as they could with the Salesforce for Outlook action menu. See [Create Salesforce Records from Outlook and Gmail](#).

### Using Outlook Integration with Einstein Activity Capture

Outlook Integration and Einstein Activity Capture were designed to work together. But there are a few considerations for using the two products together.

To avoid seeing duplicates on the activity timeline, manual logging for Outlook integration is disabled for users set to these Einstein Activity Capture sync directions: Exchange to Salesforce and Both Directions. If you want to let reps continue to use manual logging with Outlook integration, reps must be set to the sync direction Salesforce to Exchange. Decide which option is best for your company, and tell your testers and users which behavior to expect.

### Consider Enhanced Email

With the Outlook integration, if you turn on Enhanced Email, Outlook emails are logged as Salesforce emails. And reps can relate Outlook emails to multiple Salesforce contacts or leads. If you turn off Enhanced Email, Outlook emails are logged as Salesforce tasks. And when reps log those tasks to Salesforce, reps can't relate tasks to multiple contacts or leads like they could with Salesforce for Outlook. This behavior occurs even when shared activities is turned on (the Allow Users to Relate Multiple Contacts to Tasks and Events option on the Activity Settings page in Setup).

### Time Your Migration

Salesforce automatically disconnects the Salesforce for Outlook side panel when reps connect using Outlook integration. See [Considerations for Running Outlook Integration and Salesforce for Outlook \(Retiring\) Simultaneously](#). If you begin your testing or rollout before the 2024 retirement, plan your rollout accordingly. Remember to tell sales reps when they can expect to lose access to Salesforce for Outlook and gain access to Outlook integration.

### Review All Outlook Integration Considerations

Review these [considerations for setting up the Outlook integration](#), which apply to all Outlook Integration users.

#### EDITIONS

Outlook integration is available in Salesforce Classic and Lightning Experience in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

## Things to Know Before Rolling Out Einstein Activity Capture

Unlike Salesforce for Outlook, Einstein Activity Capture offers email, event, and contact capture functionality as well as contact and event sync. Before you roll out the product to your users, learn about the differences between the two, and be aware of the considerations for capture.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

Capture functionality automatically displays relevant Outlook email, event, and contact details in Salesforce without creating records for them.

- Relevant Outlook email and events are automatically displayed on the activity timelines of related Salesforce records, and on the Salesforce calendar.
- Relevant Outlook contact data is also captured and used to create email insights and recommended connections. To get a better understanding of those features, see [What Does Einstein Activity Capture Do?](#)

### Make Sure Your Users Are Ready to Work in Lightning Experience

Einstein Activity Capture requires Lightning Experience. Make sure you roll out Lightning Experience before you begin your migration to Einstein Activity Capture. See [How to Transition to Lightning Experience](#). However, don't remove your sales reps' access to Salesforce Classic just yet. Removing reps' access to Salesforce Classic also cuts off their access to Salesforce for Outlook, which you might not be ready for. Plus, if you plan to roll out sync as well, some reps need Salesforce Classic to clean up their duplicate repeating events. We cover those details later in the rollout process.

### Enabling Capture vs. Enabling Sync

Some admins can opt to set up capture instead of sync to save on Salesforce storage, avoid sync lags for customers with lots of event and contact data, and avoid any cumbersome considerations for migrating to a new sync product. To do so, set up reps for Einstein Activity Capture, but don't create sync configurations for reps.

While it isn't possible to turn off email capture, it is possible to set up contacts and events for sync only. To do so you must choose the Einstein Activity Capture sync direction Salesforce to Exchange for contacts or events. With that sync direction, Outlook events are no longer automatically displayed to the activity timelines of related Salesforce records or to reps' Salesforce calendars, and Outlook contact data also stops being captured.

It's not possible to turn off contact or event capture for the Exchange to Salesforce or Both Directions sync directions.

### Review More Considerations

Before rolling out Einstein Activity Capture, review the considerations that impact all customers. [Considerations for Setting Up Einstein Activity Capture](#).

## EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

Available with Inbox in Sales Cloud, which is included in **Starter**, **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

## General Things to Know Before Replacing Your Sync Product

If you're replacing Salesforce for Outlook sync with our next-generation products, you're setting up Einstein Activity Capture. To avoid introducing duplicate records or missing items for sync, review these considerations before you start your migration and follow any recommended guidelines.

- ! **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).
- Einstein Activity Capture requires Lightning Experience. If you haven't already, roll out Lightning Experience before you begin your migration to Einstein Activity Capture. See [How to Transition to Lightning Experience](#). However, don't remove your sales reps' access to Salesforce Classic just yet. Removing reps' access to Salesforce Classic also cuts off their access to Salesforce for Outlook, which can be something you're not ready for. Plus, some reps need Salesforce Classic to clean up their duplicate repeating events. We cover those details later in the rollout process.
- While you can choose to enable capture only, if you want to sync as well, in most cases you're required to enable both capture and sync. To get a better understanding of the differences between capture and sync, and when sync only is available, review [Things to Know Before Rolling Out Einstein Activity Capture](#).
- Rather than syncing with the Outlook email client, Einstein Activity Capture syncs with Exchange, the Outlook email server that works behind the scenes. When you're setting up Einstein Activity Capture, notice that we sometimes refer to Exchange in place of Outlook. This detail matters to your IT or Exchange admin. But in most cases, you can assume that "Outlook" and "Exchange" refer to the same part of reps' user experience.
- Einstein Activity Capture sync doesn't support contact or event syncing with alias email addresses. Confirm that you've assigned only primary Microsoft email addresses as the usernames in your Salesforce user profiles.
- To avoid introducing sync issues for your sales reps, we recommend that you maintain the same contact and event sync directions when you migrate to Einstein Activity Capture. This recommendation is especially important if your reps are syncing recurring events with Salesforce for Outlook and you plan on rolling out Einstein Activity Capture event series sync. See [Learn About Preparing Repeating Events for Migration](#). If you must roll out different sync directions with Einstein Activity Capture, consider how that change impacts reps: First, with a few reps or a sales operations manager, review common user workflows for contacts and events. Then, consider whether those workflows have to change.

### EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter, Professional, Enterprise, Performance,** and **Unlimited** Editions

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## Things to Know Before Replacing Your Contact Sync Product

Before you move from Salesforce for Outlook to Einstein Activity Capture, review these contact sync considerations and add suggested guidelines to your migration plan.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

Similar to Salesforce for Outlook, you define reps' contact sync settings in Einstein Activity Capture sync configurations. Read about considerations and guidelines related to each sync setting.

### Choose a Contact Sync Direction

To avoid a delay during your reps' first sync, we recommend initially selecting the `Exchange to Salesforce` sync direction. If you eventually want contacts to sync both ways, you can enable that sync direction later, after all reps are actively syncing.

When choosing the `Both Directions` contact sync direction, there are guidelines to avoid syncing over the Company field in Outlook contacts. If you roll out Einstein Activity Capture after contact sync has been disabled for a significant amount of time, take this additional step: Have reps confirm that any Outlook contacts that include data in the Company field are also represented as an account record in Salesforce. Ideally, the first time a contact syncs from Outlook to Salesforce, Einstein Activity Capture locates a matching Salesforce account and relates it to the contact automatically. Otherwise, if the Outlook Company field doesn't match the Salesforce account, when a rep updates the Salesforce version of the contact, Company can be removed from Outlook.

When choosing the `Exchange to Salesforce` sync direction, Einstein Activity Capture isn't moving data from Salesforce to Outlook, so the Outlook contact Company field isn't removed when there isn't a matching account in Salesforce. However, when unmatched contacts are created in Salesforce, contacts are added to the Unresolved items list upon their first sync. After rollout, instruct users to manually relate contacts to an account or the contact remains visible only to that syncing user. See [Resolving Your Synced Contacts](#).

### Set Contact Sync Filters for Performance

Einstein Activity Capture doesn't offer as many filter options as Salesforce for Outlook. For details, see the contact sync filters row in [Learn about the Feature Differences Between Salesforce for Outlook \(Retiring\) and the Next-Generation Products](#).

Keep in mind that syncing on a large scale can introduce sync delays. Large-scale contact sync can be impacted by the number of syncing users or by any Salesforce automated processes you've implemented that create or update contacts automatically for your users. If you feel that this describes your Salesforce implementation, or it's important to your users that contact sync occurs rather quickly, follow this recommendation: If you decide to sync both ways, from your Einstein Activity sync configurations, on the Advanced Sync Settings tab, filter to limit syncing to contacts that the rep owns. If you're not sure how many contacts reps sync, choose your preferred contact setting and change it later if contact sync is slow.

## EDITIONS

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### Prepare Contact Fields for Sync

Unlike Salesforce for Outlook, at this time, Einstein Activity Capture doesn't sync custom Salesforce fields, nor does it support customizing field mappings for standard fields. However, before rolling out Einstein Activity Capture, compare Salesforce for Outlook field mappings to the list of contact fields that sync with Einstein Activity Capture. Record any inconsistencies. See [Field Mappings for Contact Sync](#). Then, consider these options for managing the differences before your rollout.

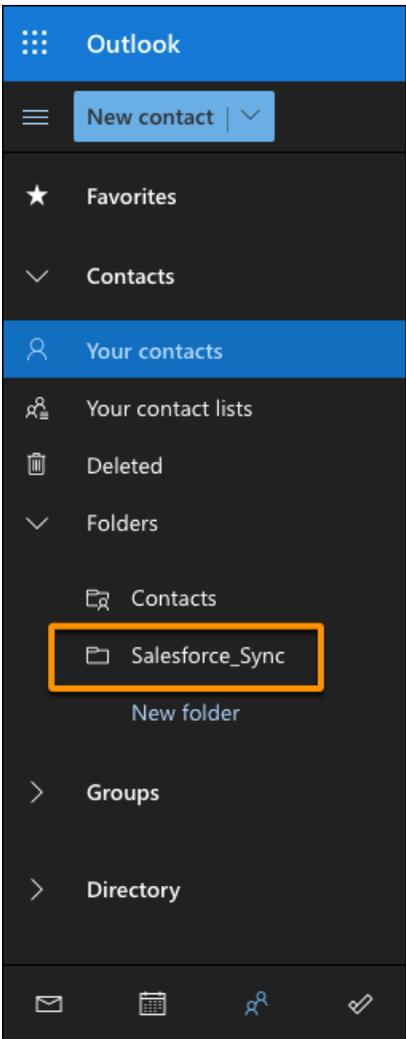
- Confirm with someone familiar with your company's sales process whether it's key to your business processes to sync any of the unsupported fields. If important to sync, come up with a plan for changing your sales process so that reps tracked these details in fields that sync. Then, communicate those process changes to your sales reps so that they know to expect them.
- If Einstein Activity Capture begins supporting these features in the future, you can return to your previous process, if you prefer.

### Prepare Reps for Contact Sync

Similar to Salesforce for Outlook, you define reps' sync settings in Einstein Activity Capture configurations. Before you do so, have reps prepare their contacts for migration to avoid creating duplicate contacts.

No matter which direction you're syncing, have reps follow these steps. Otherwise, you introduce duplicate contact records in Outlook, which users have to identify and remove manually.

- Have reps create a folder nested directly under their Outlook contact directories called `Salesforce_Sync`. Reps must nest the folder directly under their Outlook Contacts directory. It's ideal if your IT admin can manage and deploy creating this folder programmatically, but if not, reps can do it themselves manually. This image shows where the folder must be created.



- To add the appropriate contacts to the `Salesforce_Sync` folder, reps can refer to their Salesforce for Outlook categories, `Sync with Salesforce` or `Don't Sync with Salesforce`.

**Important:** If you start migrating before Salesforce for Outlook retirement, consider the timing for these steps when planning your rollout. Reps can prepare their contacts before you add them to an active Einstein Activity Capture configuration. But after reps take this step, their contacts stop syncing with Salesforce for Outlook. If reps are still using Salesforce for Outlook, have reps create the `Salesforce_Sync` folder, then immediately update Salesforce for Outlook settings to sync from that folder. See step 6 in [Install and Set Up Salesforce for Outlook](#).

After you add reps to an active Einstein Activity Capture configuration, any contacts in `Salesforce_Sync` sync between Salesforce and Outlook in the sync direction you set on the configuration.

- Note:** Contact sync doesn't support Outlook categories, so contacts labeled with a `Salesforce_Sync` category that don't exist in a contacts subfolder of the same name don't sync with Salesforce. To avoid this issue, disable contact categories and select the `Salesforce_Sync` folder for new contacts in Outlook. See [EAC - New Contacts Created In Outlook with 'Salesforce\\_Sync' Category Do Not Sync to Salesforce](#).

If you want to give your admins more specific instructions, see the Salesforce for Outlook topic, [Manage How Microsoft Outlook Items Sync with Salesforce](#).

If they like, reps can remove the `Sync with Salesforce` or `Don't Sync with Salesforce` categories after moving their contacts into the `Salesforce_Sync` folder.

If reps don't create the `Salesforce_Sync` folder before rollout, Einstein Activity Capture creates the folder for reps after you add them to an active configuration, and immediately start syncing contacts, introducing duplicates.

### Train Reps on Managing Private Contacts

With Einstein Activity Capture, reps manage private contact sync like they manage manual contact sync: By not adding contacts that shouldn't sync to the `Salesforce_Sync` folder. Unlike Salesforce for Outlook, Einstein Activity Capture has no user setting to enable or disable private contact sync.

### Train Reps on Person Account Sync

If person accounts are enabled in Salesforce, your Salesforce person accounts create Outlook contacts, and the two continue to sync.

When you train your reps, let them know these details about syncing Outlook contacts with person accounts.

- If reps are set up to sync person accounts both ways or from Exchange to Salesforce, train reps to create person accounts in Salesforce, rather than creating contacts in Outlook. Because Outlook doesn't offer a feature like person accounts, new contacts created from Outlook sync to Salesforce as contacts. Creating person accounts from Salesforce only keeps your company's person account and contact data clean and organized.
- To match person accounts and contacts, Einstein Activity Capture compares the Salesforce `First Name` and `Last Name` fields to the Outlook `Company` field. After person accounts are matched for sync, changes reps make to `First Name`, `Last Name`, and `Company` don't sync between applications.

### Things to Know Before Replacing Your Event Sync Product

Before you move from Salesforce for Outlook to Einstein Activity Capture, review these event sync considerations and add suggested guidelines to your migration plan.

#### [Learn about Administrator-Set Considerations for Migration](#)

Before you move from Salesforce for Outlook to Einstein Activity Capture, review these considerations and guidelines on admin-set settings for Einstein Activity Capture.

#### [Learn About Preparing Repeating Events for Migration](#)

When you migrate, sales reps experience sync issues with their repeating events. Determine which reps are affected, how they're affected, and get guidelines to follow so you and your reps can navigate these issues.

#### [Learn About Preparing Default Salesforce for Outlook Calendars for Migration](#)

To avoid sync issues when you migrate your reps from Salesforce for Outlook, have reps follow these guidelines to prepare their default calendars. These guidelines are the same for users syncing in any direction.

#### [Learn About More User Training for Migration](#)

Before you move from Salesforce for Outlook to Einstein Activity Capture, review these training guidelines for Einstein Activity Capture users to follow.

#### [Have Sales Reps Prepare Their Events for Sync Migration](#)

To help reps prepare their events for migration from Salesforce for Outlook to Einstein Activity Capture, work with them on completing these instructions.

### Learn about Administrator-Set Considerations for Migration

Before you move from Salesforce for Outlook to Einstein Activity Capture, review these considerations and guidelines on admin-set settings for Einstein Activity Capture.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

Similar to Salesforce for Outlook, you define reps' event sync settings in Einstein Activity Capture sync configurations. Read about considerations and guidelines related to each sync setting.

Choose an Event Sync Direction

Similar to Salesforce for Outlook, you must define a sync direction for events. To avoid introducing sync issues for your sales reps, we recommend that you maintain the same sync direction when you migrate to Einstein Activity Capture. See [General Things to Know Before Replacing Your Sync Product](#)

Keep in mind that syncing events on a large scale can impact sync wait times. For large companies or companies who create or update events using automated processes, consider using the Exchange to Salesforce sync direction. Automated processes include features such as triggers or Flow Builder, or perhaps custom automation designed by a developer at your company. While the Both Ways sync direction is available to you, keep in mind that that sync direction could delay event sync. To mitigate delays, review the advice in the next section on setting sync filters for performance.

Set Event Sync Filters for Performance

Einstein Activity Capture doesn't offer as many filter options as Salesforce for Outlook. For details, see the event sync filters row in [Learn about the Feature Differences Between Salesforce for Outlook \(Retiring\) and the Next-Generation Products](#).

Keep in mind that syncing on a large scale can introduce sync delays. Large-scale event sync can be affected by the number of syncing users or by any automated processes that create or update events automatically. If this description sounds like your Salesforce implementation, or it's important that event sync occurs rather quickly, follow this recommendation: From your Einstein Activity Capture sync configurations, from the Advanced Sync Settings tab, filter out any events that are unnecessary to track. We suggest filtering out events with the end dates: Last 7 days, Last 30 days, or even TODAY. Note: If you revise this filter later, events occurring in the past don't sync.

You can also exclude events from syncing for all your users based on the organizer's or sender's email address. The excluded addresses list also prevents emails and events from being captured and added to the activity timeline of related records. To do so, see [Exclude Emails and Events from Being Added to Salesforce for All Users](#).

If you want to avoid performance issues altogether, consider either setting up capture functionality or Outlook Integration only.

- For capture-only setup up considerations, see [Things to Know Before Rolling Out Einstein Activity Capture](#).
- By rolling out Outlook integration only, reps can manually add (or log) events and their attachments to Salesforce records. Added emails and events aren't updated when there's subsequent activity in Outlook, however. Event series can't be manually logged. See [Things to Know Before Replacing the Side Panel in Salesforce for Outlook \(Retiring\)](#).

Reconsider Mappings for Custom Fields

### EDITIONS

Available in: Lightning Experience

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Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

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Unlike Salesforce for Outlook, Einstein Activity Capture doesn't sync Outlook fields to custom Salesforce fields. If you customized your Salesforce for Outlook mappings so that Outlook fields were mapping to any custom Salesforce fields, you can't configure those same mappings with Einstein Activity Capture. To prepare your field mappings for Einstein Activity Capture rollout, follow these steps.

- Review the field mappings in your Salesforce for Outlook configurations and identify any custom Salesforce fields that you're currently syncing to.
- Review the default Einstein Activity Capture field mappings. See [Field Mappings for Event Sync](#). For any mappings that don't work for your sales reps, choose replacements from standard event fields. For help, work with someone who is familiar with your company's sales process, like an experienced sales rep, sales manager, or someone in a sales operations role. You can track any field-mapping customizations you want to make in the [Salesforce for Outlook Migration Worksheets](#) on the *Feature Usage Checklist* or *Setup Step Checklist* sheets.

Review All Einstein Activity Capture Sync Considerations

In addition, to reviewing advice specific to Salesforce for Outlook users, make sure that you review the considerations for Einstein Activity Capture meant for all users. See [Considerations for Setting Up Einstein Activity Capture](#) and the sync-related comparisons in [Learn about the Feature Differences Between Salesforce for Outlook \(Retiring\) and the Next-Generation Products](#).

## Learn About Preparing Repeating Events for Migration

When you migrate, sales reps experience sync issues with their repeating events. Determine which reps are affected, how they're affected, and get guidelines to follow so you and your reps can navigate these issues.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

### Why Do Reps Have to Prepare Repeating Events for Migration?

Repeating events are events reps schedule one time but occur multiple times. For example, your teams' monthly sales meeting or weekly 1:1s with managers are likely scheduled as repeating events. In Salesforce, repeating events are represented by two objects. Although both kinds of repeating events are visible from both Salesforce user experiences, other event functionality is limited. These limits cause issues for Salesforce for Outlook users when you migrate them to Einstein Activity Capture. For example, Salesforce for Outlook creates and syncs only recurring events (Salesforce Classic repeating events). Einstein Activity Capture creates and syncs only event series (Lightning Experience repeating events).

- Recurring events (repeating event object in Salesforce Classic)
- Event series (repeating event object in Lightning Experience)

When you migrate, reps experience different issues depending on the direction reps are set to sync. To help you navigate these issues, we provide guidelines to follow based on your reps' sync directions. First, review the prerequisite steps in the next two sections. Then follow the guidelines recommended for your sync direction.

The guidelines help reps to manually preserve event associations and details they've saved in nonsyncing fields. Plus, guidelines help reps remove duplicates from their calendars. But the date and time captured in the Salesforce event fields Last Modified By and Created By are replaced by the date and time that reps walk through these processes.

Depending on how many repeating events reps own, these processes can be tedious and take some time. Review the complete instructions before proceeding. Likewise, some solutions require you to work with users to complete the process. It's also helpful to bring in your IT admin.

 **Note:** To avoid introducing more complications to your reps' calendars, maintain the same sync direction for reps when you roll out Einstein Activity Capture. However, if you must change sync direction, don't roll out repeating event sync with Einstein Activity Capture. To do so, avoid selecting the Sync event series option when you create Einstein Activity Capture configurations.

While this solution prevents more complications, it leaves a version of each repeating event on both calendars that no longer sends and receives updates. Over time, one or both versions can become outdated, introducing inaccuracies to your reps' calendars. To correct that issue, decide which calendar is the source of truth, and have reps remove repeating events that are no longer syncing from the other calendar. If you decide to remove events from Salesforce, reps can refer to that portion of our guidelines for useful steps. See the Remove Repeating Event Duplicates After Migration section in [Manage Your Repeating Events for Migration](#).

### Check Which Sales Reps Are Affected

## EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter, Professional, Enterprise, Performance,** and **Unlimited** Editions

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Refer to your existing Outlook configurations or the notes you retained on your configurations. If the Sync recurring events option is selected, users assigned to that configuration are impacted. Follow the recommendations suggested for your sync direction. If no reps are set up to sync recurring events, proceed to the next user preparation task, [Learn About Preparing Default Salesforce for Outlook Calendars for Migration](#).

Depending on your implementation, it's possible that reps have event series instead of or in addition to recurring events on their Salesforce calendars. How can you tell which repeating events are recurring events and which are event series? Proceed to the guidelines for your sync direction. We alert either you or your reps how to tell the difference and when no further action is needed.

#### Repeating Event Guidelines for Users Assigned to Sync Outlook to Salesforce or Both Ways

For reps assigned to the sync directions Outlook to Salesforce or Both Ways, Einstein Activity Capture creates a duplicate event series for every recurring event. On their Salesforce calendars, reps see duplicates of every repeating event occurrence: one that syncs with Outlook and one that doesn't. The original recurring event occurrences stop receiving and sending updates between Salesforce and Outlook. As a result, over time, either or both calendars can become inaccurate or cumbersome to manage.

This issue is unavoidable, but these guidelines help you work with your reps to identify and manually remove their old recurring events.

1. Ask your IT admin to back up events in both Salesforce and Exchange in case any mistakes are made along the way.
  - In Exchange, admins can copy each user's events into a backup folder.
  - In Salesforce, admins can write a query against SOAP API or REST API to export events to a backup .csv file.
2. Ask your reps to prepare all events on their calendar for sync. See [Prepare Your Default Outlook Calendar for Migration](#) and [Get Ready to Sync Events Using Einstein Activity Capture](#).
3. When you're ready to migrate, in addition to setting up your other features, we recommend selecting these settings on reps' Einstein Activity Capture configurations.
  - a. On the General Sync Settings tab, select the same event sync direction that you were using with Salesforce for Outlook. Switching your event sync direction during migration can introduce more issues with repeating events.
  - b. On the Advanced Sync Settings tab, select **Sync event series**.
  - c. On the Advanced Sync Settings tab, select **Relate synced events to Salesforce records**. This setting isn't required, but it automatically relates events to reps' matching contacts or leads. Doing so can help reps when they're manually cleaning up duplicates later.
4. Allow some time to make sure events have finished syncing. You can ask your reps to compare their Outlook and Salesforce calendars to see if events have synced. Reps can take it from here. Let them know which sync direction they're set to, and send reps instructions for identifying and manually deleting duplicate repeating events. See [Manage Your Repeating Events for Migration](#).
5. Remind reps not to create repeating events from Salesforce Classic, or else those events don't sync. When reps have finished removing their duplicate repeating events from Salesforce, come up with a plan for removing or reducing reps' access to Salesforce Classic. See [Optimize Phase: Make Lightning Experience Stick](#).

#### Repeating Event Guidelines for Users Assigned to Sync Salesforce to Outlook Only

For reps assigned to sync from Salesforce to Outlook only, when you migrate to Einstein Activity Capture, any recurring events created in Salesforce Classic stop syncing. A version of each repeating event is left on both calendars, but updates are no longer sent and received between calendars. As a result, either or both events become inaccurate over time as reps update one version and not the other.

To prevent this issue, we provide guidelines that you can share with reps to help them re-create their repeating events before you roll out Einstein Activity Capture. We also include steps to help reps remove the old recurring events after rollout. It can be helpful to involve an IT admin in the process.

-  **Important:** When scheduling your rollout milestones, plan to activate Einstein Activity Capture configurations shortly after reps finish preparing their events for migration. Minimizing sync downtime reduces opportunities for your reps to introduce differences between their Salesforce and Outlook calendars, which can cause confusion in the interim.

1. Ask your IT admin to back up events in both Salesforce and Exchange in case reps make mistakes along the way.
  - In Exchange, admins can copy each user's events into a backup folder.
  - In Salesforce, admins can write a query against SOAP API or REST API to export events to a backup .csv file.
2. Export all events in Salesforce using Data Export. See [Export Backup Data from Salesforce](#).
3. Save a backup copy of the resulting Event.csv just in case!
4. Open the Event.csv file in an app that lets you edit spreadsheets, and, to narrow down which repeating events reps have to re-create, follow these steps.
  - a. Remove any events (rows) that have an empty RecurrenceActivityId column. The RecurrenceActivityId column can be used to determine which events occur only one time and which are recurring events or event series. Events (rows) that show a string of text in the RecurrenceActivityId column are recurring events.
  - b. Remove any events (rows) that show a "1" in the IsChild column. Events (rows) that show a "1" in the IsChild column indicate that the event is the version that the attendee sees. Events with attendees must be prepared for migration by the syncing organizer (the organizers' version is somewhere in the spreadsheet, too).
  - c. Remove any events (rows) that show a "1" in the IsDeleted column. Events (rows) that show a "1" in the IsDeleted column were deleted by reps, so reps don't want to preserve them.
  - d. We recommend removing any events (rows) that occurred before today's date. Usually, doing so significantly reduces the number of events you ask your reps to re-create. The ActivityDate column shows the date the event was scheduled.

 **Note:** If reps' Salesforce for Outlook sync filters are set to sync past events, past events that you remove from the spreadsheet don't sync if reps happen to edit them. But the possibility for past events to miss updates eventually closes. You can only sync events up to 180 days in the past. It's up to you to decide how important past events are and which course of action is best for your sales reps. To check for event sync filters, review your Outlook configuration for a filter on the End field.
5. Identify which reps on the remaining events in the spreadsheet.
  - a. Sort the spreadsheet by the OwnerID column. Doing so groups all events created by the same user in descending numerical order.
  - b. Copy the OwnerID from the first row, and open Salesforce. From Lightning Experience, paste the ID into global search. See [Search for Records in Lightning Experience](#).
  - c. Lightning Experience returns the user profile of the user who created that record. Remember that only Salesforce users who are syncing events with Salesforce must re-create their recurring events. You can cross-check users between the spreadsheet and your Salesforce for Outlook configurations.
  - d. Return to the spreadsheet and add a column where you can paste that user's name or email address, so you can follow up with the user.
  - e. Add that users' name for all other events in the spreadsheet that include that ID in the Owner ID column. Use the Find feature in your spreadsheet to locate all instances of that ID.
  - f. Find the next unique OwnerID, and repeat the preceding steps b. through e. to locate and associate the users' contact info with the recurring events the user owns in the spreadsheet.
6. When you identify all recurring event owners, instruct those reps to re-create those recurring events.
  - Provide each rep with the spreadsheet details that pertain to their recurring events.
  - Provide instructions for how to identify their recurring events and re-create them as event series. See the section for users syncing Salesforce to Outlook only in [Manage Your Repeating Events for Migration](#).
  - To avoid extended sync downtime, set a reasonable deadline for reps to complete your request.

- Have reps confirm when they finished re-creating events. Verify their status by exporting Salesforce events again, and use the criteria in step 4 to reduce the list the same way you had previously.
  - Remind reps not to create recurring events from Salesforce Classic any longer, because those events can never sync.
7. When reps are done recreating events (and your other migration preparation is complete), you can deactivate Salesforce for Outlook event sync.
  8. Confirm with reps that Salesforce for Outlook is deactivated, so their events aren't syncing to Outlook. Have reps complete the remaining steps to prepare the rest of their events for migration. See [Prepare Your Default Outlook Calendar for Migration](#) and [Get Ready to Sync Events Using Einstein Activity Capture](#).
  9. When reps are done preparing the rest of their events, you can activate Einstein Activity Capture event sync. In addition to setting up your other features, we recommend selecting these settings on reps' Einstein Activity Capture configurations.
    - a. On the General Sync Settings tab, select the same event sync direction that you were using with Salesforce for Outlook. Switching your event sync direction during migration can introduce more issues with repeating events.
    - b. On the Advanced Sync Settings tab, select **Sync event series**.
    - c. On the Advanced Sync Settings tab, select **Relate synced events to Salesforce records**. This setting isn't required, but it automatically relates events to reps' matching contacts or leads. Doing so can help reps when they're manually cleaning up duplicates later.

## Learn About Preparing Default Salesforce for Outlook Calendars for Migration

To avoid sync issues when you migrate your reps from Salesforce for Outlook, have reps follow these guidelines to prepare their default calendars. These guidelines are the same for users syncing in any direction.

**Important:** When scheduling your rollout milestones, plan to activate Einstein Activity Capture configurations shortly after reps finish preparing their events for migration. Minimizing sync downtime reduces opportunities for your reps to introduce differences between their Salesforce and Outlook calendars, which can cause confusion in the interim.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

### Why Do Reps Have to Prepare Their Default Calendars for Migration?

Unlike Salesforce for Outlook, Einstein Activity Capture syncs with a reps' default Outlook calendar only. Reps can't manage their syncing events by selecting a certain calendar (or Outlook folder) for sync.

If reps have elected to sync events to alternative calendars using Salesforce for Outlook, when you enable Einstein Activity Capture, the product can't locate the alternative calendars and instead syncs any events it finds on the reps' default calendar—which likely aren't the events the rep intended to sync if they had organized their calendars otherwise.

### Does This Consideration Impact Your Users?

If reps have organized their calendars this way, reps are probably aware of it. In that case, it's probably safe to just share guidelines with them before your rollout and give them time to prepare their calendars. However, in case reps don't know, they can check their Salesforce for Outlook Settings before Salesforce for Outlook is retired in 2024 to see which calendar they're syncing. For help, see step 6 in [Install and Set Up Salesforce for Outlook](#).

### How Can Reps Navigate This Issue?

Before you begin your rollout, share instructions for completing preparatory steps with your testers or users. See [Prepare Your Default Salesforce for Outlook Calendar for Event Sync Migration](#).

## EDITIONS

Available in: Lightning Experience

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## Learn About More User Training for Migration

Before you move from Salesforce for Outlook to Einstein Activity Capture, review these training guidelines for Einstein Activity Capture users to follow.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

### Train Reps on How to Prevent Certain Events from Syncing

Unlike Salesforce for Outlook, with Einstein Activity Capture, reps don't use Outlook categories to mark their events for sync. Instead, you largely control what syncs using the admin-set Einstein Activity Capture settings and filters. Putting admins in control of what syncs relieves reps of the responsibility of doing so, keeping both Salesforce and Outlook events aligned and up to date.

However, because you want to keep personal or irrelevant events out of Salesforce, reps have some control over what syncs. Reps could be aware of these details thanks to earlier steps completed to prepare for migration, but it's a good idea to remind reps during training as well. See [Get Ready to Sync Events Using Einstein Activity Capture](#).

### Train Reps on Private Event Sync

Unlike Salesforce for Outlook, Einstein Activity Capture has no user setting to enable or disable private event sync. However, you can decide whether reps' private events sync by choosing the private event sync setting in Einstein Activity Capture configurations. If you disable private event sync, events can prevent certain events from syncing by marking them as private. See [Get Ready to Sync Events Using Einstein Activity Capture](#).

### Train Reps on Attendee Sync

Unlike Salesforce for Outlook, with Einstein Activity Capture, details about contacts, leads, and other Salesforce users invited to Salesforce events sync to Outlook.

Events sync for both the organizer and attendees according to the sync direction admins have set for the organizer. For this reason, it's best when admins set up event sync for whole teams, especially those teams that meet together often. Sometimes this behavior is unavoidable, but note that when a nonsyncing organizer invites a syncing attendee, the attendee experiences some unexpected sync behavior. Sometimes, events don't sync at all. To learn more, see [How Event Attendees Sync with Einstein Activity Capture](#). Get familiar with the functionality and anything you must note for your testers and sale reps.

Also note that attendee responses to event invitations never sync from Salesforce to Exchange. To avoid overwriting attendance statuses, [train reps on where to respond to event invitations based on their set sync directions](#).

### Tell Reps About Any Changes to Sync Direction

We recommend that you avoid changing your event sync direction when you migrate. But if you must do so, remember to communicate the change to your testers and sales reps so they know from which calendars to update their events. Keep in mind that changing your sync direction during migration can impact your data in either or both applications. See the Choose an Event Sync Direction section in [Learn about Administrator-Set Considerations for Migration](#).

### Tell Reps About Any Changes to Field Mappings

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If you had to alter your field mappings because Einstein Activity Capture doesn't sync to custom Salesforce fields, communicate this change to your testers and sales reps. To make sure that important event data continues to sync between calendars, the change in mappings likely requires a change to their typical work flows. See the Reconsider Mappings for Custom Fields section in [Learn about Administrator-Set Considerations for Migration](#).

### **Have Sales Reps Prepare Their Events for Sync Migration**

To help reps prepare their events for migration from Salesforce for Outlook to Einstein Activity Capture, work with them on completing these instructions.

1. [Manage Your Repeating Events for Migration](#)

To avoid sync issues with repeating events when you migrate to Einstein Activity Capture, connect with your Salesforce admin about how you're impacted. Then, follow the steps recommended for your sync direction.

2. [Prepare Your Default Salesforce for Outlook Calendar for Event Sync Migration](#)

To avoid sync issues when you migrate from Salesforce for Outlook to Einstein Activity Capture, follow these guidelines to prepare your default calendars.

3. [Get Ready to Sync Events from Salesforce for Outlook \(Retiring\) Using Einstein Activity Capture](#)

You can choose which events sync from your Microsoft® Outlook® calendar to Salesforce using Einstein Activity Capture.

[Manage Your Repeating Events for Migration](#)

To avoid sync issues with repeating events when you migrate to Einstein Activity Capture, connect with your Salesforce admin about how you're impacted. Then, follow the steps recommended for your sync direction.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

#### Why Do I Have to Manage My Repeating Events?

Repeating events are events you schedule one time but that occur multiple times. For example, your teams' monthly sales meeting or your weekly 1:1 with your manager are likely scheduled as repeating events. When your admin migrates you from Salesforce for Outlook to Einstein Activity Capture, you experience issues with repeating events. Issues are different depending on your assigned sync direction and which Salesforce user interface the repeating events were created in (Salesforce Classic or Lightning Experience).

Your admin must take initial setup steps to kick off either of these solutions, so make sure that you connect with your admin before beginning these steps. Your admin tells you which guidelines to follow, when you're cleared to begin, and other instructions on what to expect.

Depending on how many repeating events are assigned to you, these processes can be tedious and take some time. But following these steps lets you preserve event relationships to other key records and any details you saved in nonsyncing Salesforce event fields. Keep in mind that the Salesforce event fields Last Modified By and Created By are updated with the date and time that you execute these steps.

#### Remove Repeating Event Duplicates After Migration (for Users Assigned to Sync Outlook to Salesforce or Both Ways)

If you're assigned to the sync directions Outlook to Salesforce or Both Ways, when you're migrated, you see duplicate repeating events on your Lightning Experience calendar. However, after migration, follow these steps to identify and remove duplicates.

1. Wait until your admin instructs you to start addressing duplicates. Verify that the initial event sync is complete by comparing your Outlook and Salesforce calendars and checking that you have duplicates of some of your repeating events.
2. Open your Outlook calendar and two web browser windows. In the browser windows, open your calendar in Salesforce Classic in one and Lightning Experience in the other so that you can view your calendar in both experiences simultaneously. For help with switching between Salesforce user interfaces, see [Salesforce Classic Doesn't Go Away When You Move Users to Lightning Experience](#).
3. From your Salesforce Classic calendar, find a set of duplicate repeating events. We recommend you start from today's date, but you can remove duplicates on past events, too.
4. Identify the original recurring event that was previously syncing with Salesforce. In Salesforce Classic, original recurring events have a recurrence icon and hover text that says "Recurring Event."

## EDITIONS

Available in: Lightning Experience

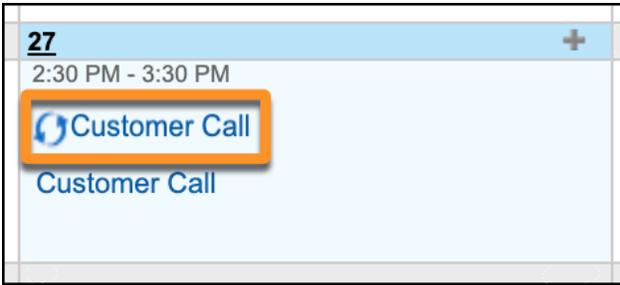
Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter, Professional, Enterprise, Performance,** and **Unlimited** Editions

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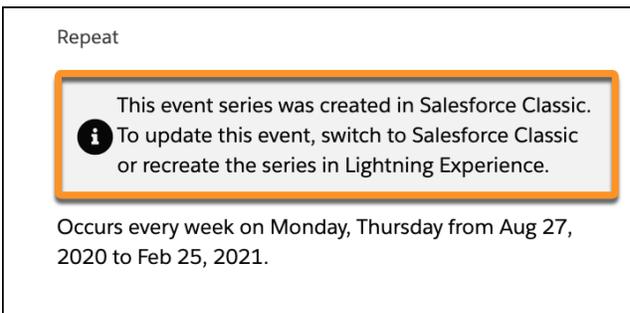
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The duplicate event series have the same title, but no icon or hover text. Open the old recurring event.

- From the Lightning Experience calendar, open the new event series. To make sure you choose the right version, click **Edit**. (If you don't see Edit, check the action menu dropdown arrow on the top right of the event page.) If the event edit page shows no message near the Repeat field, you opened the event series, which is the version you want. If you see this message near the Repeat field, close the event and open the other one: This event series was created in Salesforce Classic. To update this event, switch to Salesforce Classic or re-create the series in Lightning Experience.



- With both versions of the event open, compare related records and field data. From the Lightning Experience calendar, make any necessary updates to the new event series. Relate any preferred records that aren't related to the event series. See [Find Your Way Around Related Lists in Lightning Experience](#). Add any field data that you want to retain that didn't sync to the new series (likely because data was saved in a nonsyncing field). If your updates belong in all occurrences of that series, follow prompts to update the whole series, which results in fewer events for you to clean up manually. Whew!
- Return to your Salesforce Classic calendar and delete the original recurring event. If you're certain that you checked all occurrences of the series (or you're prepared to let some exceptions go), delete all occurrences in one action. To delete all occurrences in one action, click the **View Series** tab on the Salesforce Classic event, and then click **Delete**.  
If you prefer to save past occurrences of the event for data retention purposes, you can set the Recurrence End field to Today. Duplicates remain for past occurrences, but future duplicates are removed.
- Repeat the previous steps for all remaining duplicates that you want to remove.
- If your admin reported that you're set up to sync both ways, create any Salesforce repeating events from Lightning Experience from now on. If you're set up to sync from Outlook to Salesforce only, continue creating your events from your Outlook calendar. In both cases, after your admin rolls out Einstein Activity Capture, your repeating events start to sync again.

Prepare Repeating Events Before Migration (for Users Assigned to Sync Salesforce to Outlook Only)

If you're assigned to the Salesforce to Outlook sync direction, when you migrate to Einstein Activity Capture, repeating events created in Salesforce Classic stop syncing with Outlook. To avoid this issue, you can re-create your repeating events from Lightning Experience before your admin rolls out Einstein Activity Capture. Then, to avoid having duplicates on your calendar, delete the original repeating events that are no longer syncing.

Keep in mind that your new event series doesn't sync to Outlook until your admin finishes rolling out Einstein Activity Capture. Try to stick to your admin's deadlines to minimize sync downtime.

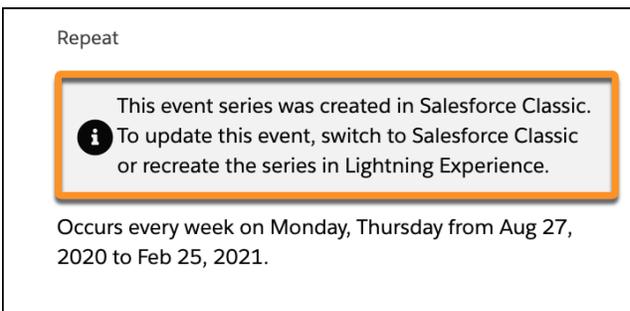
1. Identify which repeating events you must re-create. Open the list your admin provided of all the repeating events assigned to you that were originally created in Salesforce Classic.
2. From Lightning Experience, locate your recurring events. To do so, copy the title of the first event from your list. Next, from Lightning Experience, paste the subject you copied from your list into global search. See [Search for Records in Lightning Experience](#).

 **Note:** The list from your admin shows multiple instances of the same event title. It's because the spreadsheet records each occurrence of your repeating event. You don't necessarily have to re-create every occurrence, but you want to check some. Consider the following:

- If you routinely edit or relate other Salesforce records to individual occurrences rather than updating all instances of the recurring event, we recommend that you review all occurrences. Otherwise, changes you made to individual occurrences aren't included when you re-create the series. Most important are related records added to the Related To or Name fields, and details saved in nonsyncing fields, because that data hasn't synced to Outlook. In the spreadsheet, recurring events that represent the whole series show a "1" in the IsRecurrence column, and individual occurrences show a "0".
- If you have recurring events with no end date, you have many individual occurrences! In that case, we recommend review only individual instances within a reasonable window of time. For example, you have updated some of those events in the coming months, perhaps the next year. But you likely haven't touched those events scheduled for years or decades in the future.

Or, if you feel comfortable letting some event details go in the interest of working through the spreadsheet more quickly, go for it!

3. To verify that the repeating event was created in Salesforce Classic, open one of the occurrences, and then click **Edit**. (If you don't see Edit, check the action menu dropdown arrow on the top right of the event page.) If the event was created in Salesforce Classic, the event shows this message near the Repeat field: This event series was created in Salesforce Classic. To update this event, switch to Salesforce Classic or re-create the series in Lightning Experience.



4. If you see that message, proceed to the next step. If you don't see the message, Einstein Activity Capture can sync this event. Return to step 2 and locate the next repeating event on your list with an original title.
5. For every repeating event that includes the Salesforce Classic message on the edit screen, re-create the event in Lightning Experience. Open a second web browser window. Then view details from the original repeating event in one window, and create the event series in the second window.
6. Check for any Salesforce records that were related to the original repeating event. See [Find Your Way Around Related Lists in Lightning Experience](#).
7. If any records related to the original event exist, add them to the Related To or Name fields on the new repeating event.

8. To avoid retaining a duplicate, nonsyncing event when your admin rolls out Einstein Activity Capture, delete the original repeating event from Salesforce Classic. If you feel skittish about deleting your event before confirming that migration was successful, you have these options.
  - From Salesforce Classic, on the original event, set the Recurrence End field to Today. That way, you still have duplicate events in the past, but starting tomorrow, your calendar doesn't include duplicates. Make note of the date, and the old recurring event is available if you need it later.
  - Wait until your admin confirms that the Einstein Activity Capture rollout is complete. Then, return to the spreadsheet, locate your events, and delete duplicates. The preceding Remove Repeating Event Duplicates After Migration section steps you through that process.
9. When you're finished re-creating all your repeating events, let your admin know that you're ready for them to deactivate your Salesforce for Outlook event sync. From now on, create any repeating events from Lightning Experience. Remember that your Outlook events aren't receiving updates from Salesforce until your admin completes the migration process.
10. After your admin confirms that Salesforce for Outlook is deactivated, make sure that you complete the remaining steps to prepare your nonrepeating events for migration. See [Prepare Your Default Outlook Calendar for Migration](#) and [Get Ready to Sync Events Using Einstein Activity Capture](#).
11. When you're finished preparing all events, tell your admin that your events are ready for Einstein Activity Capture rollout.

Prepare Your Default Salesforce for Outlook Calendar for Event Sync Migration

To avoid sync issues when you migrate from Salesforce for Outlook to Einstein Activity Capture, follow these guidelines to prepare your default calendars.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

Why Do I Have to Prepare My Default Calendar for Migration?

Unlike Salesforce for Outlook, Einstein Activity Capture syncs with your default Outlook calendar only. You can't manage your syncing events by selecting a certain calendar (or Outlook folder) for sync.

If you have elected to sync events to alternative calendars using Salesforce for Outlook, when your admin enables Einstein Activity Capture, the product can't locate the alternative calendars and instead syncs any events it finds on your default calendar—which likely aren't the events you intended to sync.

Does This Consideration Impact You?

If you don't know, you can check your Salesforce for Outlook Settings before Salesforce for Outlook is retired in June 2024 to see which calendar you're syncing. For help, see step 6 in [Install and Set Up Salesforce for Outlook](#).

How Can I Prepare My Calendars Before Rollout?

If you want to continue managing separate calendars, move all events that you want to sync onto your default calendar. Any events that you don't want to sync can be added to alternative calendars as instructed in [Get Ready to Sync Events Using Einstein Activity Capture](#).

Complete these steps in a timely fashion, when your Salesforce admin asks you to. It's important that these steps are completed before your admin rolls out Einstein Activity Capture for you.

## EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

Available with Inbox in Sales Cloud, which is included in **Starter**, **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

[Get Ready to Sync Events from Salesforce for Outlook \(Retiring\) Using Einstein Activity Capture](#)

**EDITIONS**

Available in: Lightning Experience

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Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

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Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

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Available with Inbox in Sales Cloud, which is included in **Starter**, **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

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Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

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Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

You can choose which events sync from your Microsoft® Outlook® calendar to Salesforce using Einstein Activity Capture.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

If your administrator has set up Einstein Activity Capture, your events sync automatically between Outlook and Salesforce. Events sync when you create or update them. If you've got many events, your first sync could take some time.

Admins decide in what direction your events sync: Exchange to Salesforce, Salesforce to Exchange, or both directions. Ask your admin in which direction you're set up to sync, so you know where to update your events.

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

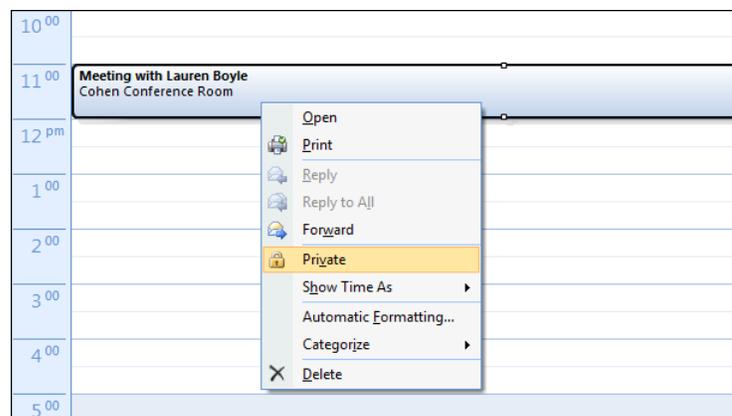
- Are you syncing private events?
- Are events that you delete in one calendar automatically removed from the other?
- Are your events automatically related to relevant Salesforce contacts, or one relevant lead?
- Are you syncing event series (repeating events created in Lightning Experience or the Salesforce mobile app)?

#### Prevent Personal Events from Syncing

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

- Create a separate calendar in your calendar application to keep track of your personal events. Einstein Activity Capture syncs only your default Outlook calendar to Salesforce.
- Exclude events from syncing based on the organizer's or sender's email address. See [Exclude Emails and Events from Being Added to Salesforce](#). The excluded addresses list also prevents emails and events from being captured and added to the activity timeline of related records.
- Ask your admin if your sync configuration is set to sync private events. If you're not syncing private events, you can assign events with the `Private` option from your calendar application, and those events don't sync with Salesforce.

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



## USER PERMISSIONS

To sync events both ways:

- Read and Edit on events

AND

Event sync direction set to Sync both ways in an active Einstein Activity Capture sync configuration

To sync events from Outlook to Salesforce:

- Create on events

AND

Event sync direction set to Exchange to Salesforce in an active Einstein Activity Capture sync configuration\*

\*If admins enable the Relate synced events to Salesforce records option in a user's sync configuration, users should also have Read on contacts and leads to take advantage of that feature.

Respond to Event Invitations from Outlook

Your responses to event invitations don't sync from Salesforce to Outlook. To avoid overwriting your attendance status, [learn where is best to accept and decline event invitations based on your sync direction](#).

## Test Your Next-Generation Product Rollout

When you've followed all the pre-rollout steps, you're ready to test your Outlook Integration and Einstein Activity Capture rollouts. Follow these steps to get started. And remember, we encourage you to run your tests in sandbox, or with a small group of test users.

1. [Disable Salesforce for Outlook \(Retiring\) for Your Testers](#)

If you're starting your rollout before the December 2027 retirement of Salesforce for Outlook, avoid product conflicts by deactivating Salesforce for Outlook configurations for your testers or users. Or, if the retirement has passed, you can simply uninstall Salesforce for Outlook for your testers or users.

2. [Roll Out the Outlook Integration to Your Testers or Users](#)

Follow these steps to roll out the Outlook Integration to your testers or users.

3. [Roll Out Einstein Activity Capture to Your Testers or Users](#)

Follow these steps to roll out Einstein Activity Capture to your testers or users.

## Disable Salesforce for Outlook (Retiring) for Your Testers

If you're starting your rollout before the December 2027 retirement of Salesforce for Outlook, avoid product conflicts by deactivating Salesforce for Outlook configurations for your testers or users. Or, if the retirement has passed, you can simply uninstall Salesforce for Outlook for your testers or users.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

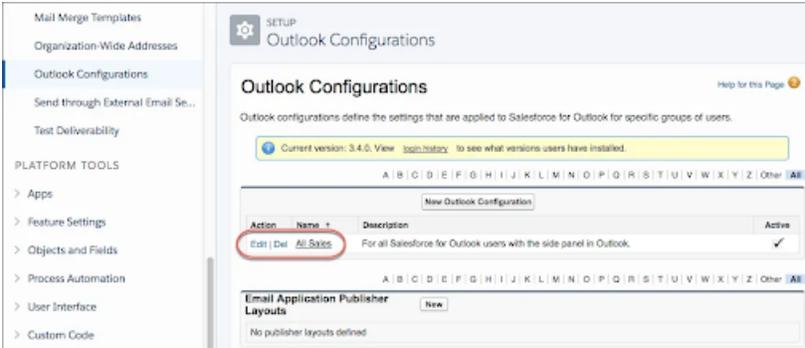
If the 2024 retirement has passed, you can simply [uninstall Salesforce for Outlook](#) for your testers or users. Otherwise, you must make sure you disable configurations before you start your rollout or testing.

Deactivate Salesforce for Outlook Configurations

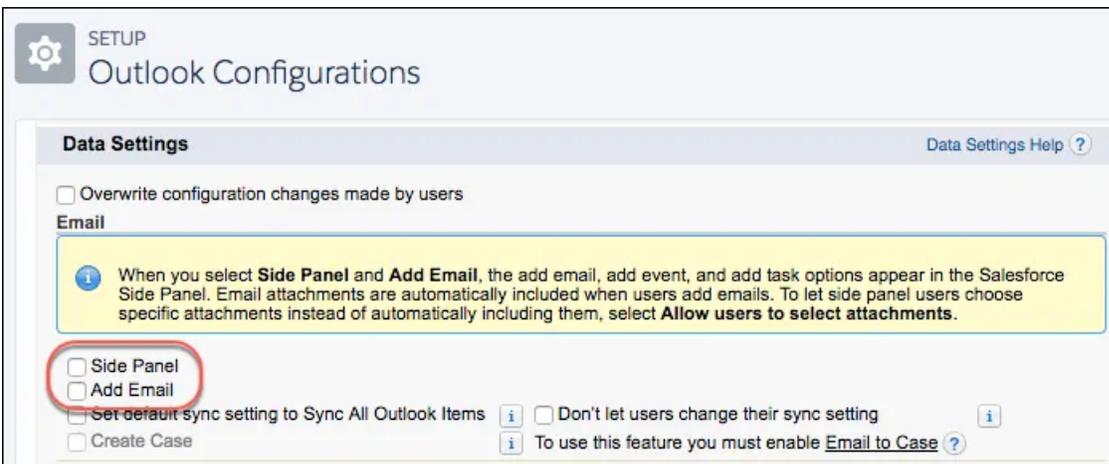
Before you deactivate, communicate the deactivation timeline to your testers or users. Tell them that during the actual move, their items don't sync, and that the Side Panel in Outlook isn't accessible.

Follow these steps to disable the Salesforce for Outlook side panel and sync functionality.

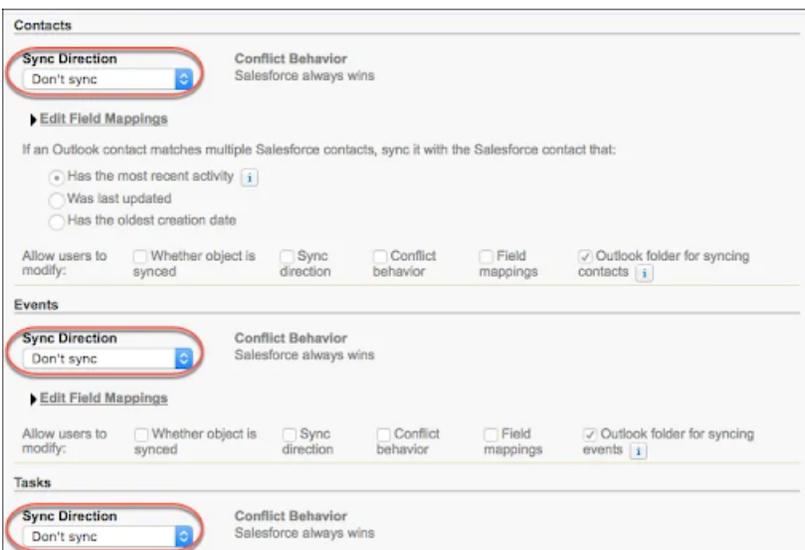
1. Click the Setup icon, and select **Setup**.
2. Enter *Outlook Configurations* in the Quick Find box, and then select **Outlook Configurations**.
3. Click **Edit** next to an Outlook configuration.



4. Scroll to Data Settings, and then deselect **Side Panel** and **Add Email**.



5. For contacts, events, and tasks, set the sync direction to **Don't sync**.



6. Click **Save**.

## Roll Out the Outlook Integration to Your Testers or Users

Follow these steps to roll out the Outlook Integration to your testers or users.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

1. [Set Up the Integration with Outlook](#).
2. [Enable Event Type Selections to Log Events from Outlook or Gmail](#).
3. [Customize the Email Integration Pane for Outlook and Gmail](#).
4. [Extend the Outlook and Gmail Integrations with Inbox](#).

### EDITIONS

Outlook integration is available in Salesforce Classic and Lightning Experience in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## Roll Out Einstein Activity Capture to Your Testers or Users

Follow these steps to roll out Einstein Activity Capture to your testers or users.

- !** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).
1. Before beginning your rollout, make sure you and your users have prepared their events for sync. See [Have Sales Reps Prepare Their Events for Sync Migration](#) on page 632.
  2. Next [Set Up Einstein Activity Capture](#).
  3. Next, make sure reps prepare complete some steps to finalize setup. See [Use Einstein Activity Capture](#).

## Roll Out the Next-Generation Products in Production

When you finish testing, get feedback from your testers and revise your rollout plan. If you must, repeat testing multiple times, updating your plan each time to work out all of the snags. Then, when you're ready, follow the remaining steps below. When you're done, return to your rollout plan, and repeat the rollout again--this time in production.

1. [Disable Einstein Activity Capture Configurations in Sandbox](#)  
If you tested using a sandbox, it's important that you keep test data out of your Salesforce production org. To do so, deactivate Einstein Activity Capture configurations as soon as your testing is complete.
2. [Uninstall Salesforce for Outlook \(Retiring\) After Migration](#)  
Even if the 2024 retirement has passed, to avoid leaving unusable applications on your sales reps' computers, uninstall Salesforce for Outlook.

## Disable Einstein Activity Capture Configurations in Sandbox

If you tested using a sandbox, it's important that you keep test data out of your Salesforce production org. To do so, deactivate Einstein Activity Capture configurations as soon as your testing is complete.

- !** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

To learn more, see the Multiple Orgs section in [Considerations for Setting Up Einstein Activity Capture](#) and [How Salesforce Manages Sync and Capture Conflicts between products](#).

## Uninstall Salesforce for Outlook (Retiring) After Migration

Even if the 2024 retirement has passed, to avoid leaving unusable applications on your sales reps' computers, uninstall Salesforce for Outlook.

### EDITIONS

Available in: Lightning Experience

Available with Einstein Activity Capture Standard, which is available in Sales Cloud in **Starter, Professional, Enterprise, Performance,** and **Unlimited** Editions

Available with Sales Cloud Einstein, which is available in **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

Available with Inbox in Sales Cloud, which is included in **Starter, Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions, and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

Available with Revenue Intelligence, which is available for an extra cost in **Enterprise** and **Unlimited** Editions

**!** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

Coordinate with your IT pro to uninstall Salesforce for Outlook from your reps' computers. Or if your reps have administrative permissions for their computers, point your reps to the procedure for [uninstalling Salesforce for Outlook](#).

## Reference Considerations for Moving from Salesforce for Outlook (Retiring) to the Next-Generation Products

Before you move from Salesforce for Outlook to the Outlook integration and Einstein Activity Capture, get up to speed on these product differences. Salesforce for Outlook is scheduled for full retirement in June 2024.

**!** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

### [Learn about the Support Differences Between Salesforce for Outlook \(Retiring\) and the Next-Generation Products](#)

To prepare for your move from Salesforce for Outlook, review the Outlook integration and Einstein Activity Capture systems requirements and supported Salesforce licenses and editions.

### [Learn about the Feature Differences Between Salesforce for Outlook \(Retiring\) and the Next-Generation Products](#)

To help you decide whether the Outlook integration and Einstein Activity Capture are right for you, review how each compares to Salesforce for Outlook. Salesforce for Outlook is scheduled for full retirement in June 2024.

### [Considerations for Running Outlook Integration and Salesforce for Outlook \(Retiring\) Simultaneously](#)

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

### [How Salesforce Manages Sync Conflicts Between Products](#)

Learn how Salesforce manages conflicts when users are assigned to configurations for multiple products such as Einstein Activity Capture, Lightning Sync, and Salesforce for Outlook.

#### SEE ALSO:

[Considerations for Running Outlook Integration and Salesforce for Outlook \(Retiring\) Simultaneously](#)

[How Salesforce Manages Sync Conflicts Between Products](#)

## Learn about the Support Differences Between Salesforce for Outlook (Retiring) and the Next-Generation Products

To prepare for your move from Salesforce for Outlook, review the Outlook integration and Einstein Activity Capture systems requirements and supported Salesforce licenses and editions.

**!** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

You can use our handy decision-making tool, [Design Your Perfect Salesforce Email Integration](#) to help you decide which product is best for you.

Product Detail	Salesforce for Outlook	Outlook Integration + Einstein Activity Capture
Supported Microsoft applications	See <a href="#">Salesforce for Outlook System Requirements</a> .	<p>Our next-generation products aren't compatible with Microsoft Outlook 2010 or Microsoft Exchange 2010. Microsoft has announced a pending end of support for those applications. To continue integrating Microsoft with Salesforce, move to versions of Outlook and Exchange that both Microsoft and Salesforce support. See:</p> <ul style="list-style-type: none"> <li>• <a href="#">Outlook Integration System Requirements</a></li> <li>• <a href="#">Einstein Activity Capture System Requirements</a></li> </ul>
Supported Salesforce user interfaces	<ul style="list-style-type: none"> <li>• Lightning Experience</li> <li>• Salesforce Classic</li> </ul> <p>Supports syncing contacts, events, and tasks that are created or edited in the Salesforce mobile app.</p>	<p>Both products are supported in Lightning Experience.</p> <p>Outlook Integration is also supported in Salesforce Classic.</p> <p>Einstein Activity Capture also supports syncing and capturing contacts and events that are created or edited in the Salesforce mobile app.</p>
Supported editions	<ul style="list-style-type: none"> <li>• Personal</li> <li>• Contact Manager</li> <li>• Professional</li> <li>• Enterprise</li> <li>• Performance</li> <li>• Unlimited</li> <li>• Developer</li> </ul>	<p>Both products are supported in:</p> <ul style="list-style-type: none"> <li>• Essentials</li> <li>• Professional</li> <li>• Enterprise</li> <li>• Performance</li> <li>• Unlimited</li> </ul> <p>Outlook Integration is also supported in Group and Developer editions.</p>
Supported user licenses	Requires the standard Salesforce license with the purchase of Sales Cloud or Government Cloud.	<p>Outlook Integration requires the standard Salesforce license with the purchase of Sales Cloud, Service Cloud, or Lightning Platform.</p> <p>Einstein Activity Capture supports up to 100 users on the standard Salesforce license with Sales Cloud purchase. To set up more than 100 users for Einstein Activity Capture, a paid upgrade to Sales Cloud Einstein, Inbox, or Sales Engagement is required. See <a href="#">What Is Einstein Activity Capture Standard?</a></p> <p>If you can't upgrade, you can move to Outlook integration only or to a third-party</p>

Product Detail	Salesforce for Outlook	Outlook Integration + Einstein Activity Capture
		app on <a href="#">AppExchange</a> for now. For customers who subscribed to Salesforce before Winter '21, Lightning Sync is also an option.
Data storage	Data is stored on Microsoft servers and Salesforce servers only.	<p>The Outlook integration stores data on Microsoft servers and Salesforce servers only. If customers upgrade to Inbox, and some data is stored using a public cloud provider. See <a href="#">Salesforce Email Integration Security Guide</a>.</p> <p>With Einstein Activity Capture, data is stored on Microsoft servers, Salesforce servers, and some data is stored using a public cloud provider. See <a href="#">Einstein Activity Capture Security Guide</a>.</p>
Salesforce access to your email server	Salesforce for Outlook is an installed desktop application that requests user-level authentication access to Outlook accounts.	<p>Outlook Integration is a Microsoft Office add-in available from the Microsoft Store that requests user-level authentication access to Outlook accounts. See <a href="#">Salesforce Email Integration Security Guide</a>.</p> <p>Einstein Activity Capture offers user-level authentication and an IT admin-configured connection option that lets your admin scope access to your email server user-by-user. See <a href="#">Connect Salesforce to Exchange or Google</a> and <a href="#">Einstein Activity Capture Security Guide</a>.</p>
Support for hybrid server deployments (deployments with users on both Exchange Online and on-premises Exchange servers)	Available	Available for Outlook Integration and Einstein Activity Capture capture functionality. Not available for sync. See <a href="#">What Does Einstein Activity Capture Do?</a>

## SEE ALSO:

[Design Your Perfect Salesforce Email Integration](#)

## Learn about the Feature Differences Between Salesforce for Outlook (Retiring) and the Next-Generation Products

To help you decide whether the Outlook integration and Einstein Activity Capture are right for you, review how each compares to Salesforce for Outlook. Salesforce for Outlook is scheduled for full retirement in June 2024.

**Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

Feature	Salesforce for Outlook	Outlook Integration + Einstein Activity Capture
Get the latest product updates from Salesforce automatically.	Not available IT professionals or sales reps have to manually upgrade to new versions of Salesforce for Outlook when they're available.	Available for both products. Sales reps and admins automatically get the latest product updates with each Salesforce release. Although manual upgrades are sometimes required for Outlook integration, they're infrequent and nontechnical—either sales reps or Exchange admins can manage upgrades.
Customize the Salesforce side panel experience in Outlook.	Available with limitations Admins can overwrite side panel customizations made by users. To learn about the settings users can edit, see <a href="#">Manage Your Salesforce for Outlook Configuration</a> . We address sync-related user settings in the next row.	Available for the Outlook integration. Admins can customize several features available to reps. <ul style="list-style-type: none"> <li>• Customize the kinds of records reps can create from Outlook.</li> <li>• Admins who have enabled Lightning Experience can build customized Outlook integration panes for different groups of users. Admins can add Lightning components to the pane, including components</li> </ul>

### EDITIONS

Outlook integration is available in Salesforce Classic and Lightning Experience in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Einstein Activity Capture is available in Lightning Experience and all versions of the Salesforce mobile app in **Essentials, Professional, Enterprise, Performance, Unlimited** Editions

Salesforce for Outlook is available in Salesforce Classic and Lightning Experience in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Feature	Salesforce for Outlook	Outlook Integration + Einstein Activity Capture
		available from <a href="#">AppExchange</a> .
Admins can opt to hide or override some of users' preferred sync settings.	<p>Available with limitations</p> <p>With Salesforce for Outlook, you can give users access to a version of their Outlook configurations that lets them adjust some sync settings. To learn about the settings users can access, see <a href="#">Manage Your Salesforce for Outlook Configuration</a> and <a href="#">Manage How Microsoft® Outlook® Items Sync with Salesforce</a>. Admins can choose to override all configuration changes made by users, or override a few specific ones.</p> <ul style="list-style-type: none"> <li>• Set users' default sync setting to <code>Sync All Outlook Items</code>, so that users manually select only contacts, events, or tasks that they don't want to sync. When admins set this default, users can still change to the <code>Sync Only the Outlook Items I Select</code> setting later, which lets users manually select the items they do want to sync.</li> <li>• Prevent users from switching their sync setting between <code>Sync All Outlook Items</code> and <code>Sync Only the Outlook Items I Select</code>.</li> </ul>	<p>Available for Einstein Activity Capture.</p> <p>With Einstein Activity Capture, only admins can decide which objects sync and in which direction. Users don't have the options to adjust their sync settings, but they have a few options for preventing specific contacts and events from syncing. See <a href="#">Get Ready to Sync Events from Salesforce for Outlook (Retiring) Using Einstein Activity Capture</a>.</p>
Add Outlook emails or events to Salesforce records from the side panel.	<p>Available with limitations</p> <p>Reps can manually add Outlook emails and their attachments to Salesforce records, but emails are added to Salesforce as tasks, not emails.</p> <p>Reps can also add Outlook events, repeating events, and their attachments to Salesforce records. Repeating events are added to Salesforce as recurring events (which can be viewed from Lightning Experience and the Salesforce app, but edited in Salesforce Classic only).</p> <p>When subsequent activity occurs for manually added emails and events in Outlook, corresponding updates aren't</p>	<p>Available for both products with limitations.</p> <p>With the Outlook integration, reps can manually add Outlook emails and their attachments to Salesforce records. This feature is called logging. If Enhanced Email is enabled, Outlook emails are logged as Salesforce emails and as tasks. When disabled, Outlook emails are logged as Salesforce tasks only. With Enhanced Email, reps can also add Outlook emails to multiple Salesforce contacts, leads, or person accounts, or to one other nonperson record, such as an opportunity or case.</p> <p>Reps can also manually log non-repeating events and their attachments to one Salesforce person record and one</p>

Feature	Salesforce for Outlook	Outlook Integration + Einstein Activity Capture
	<p>made in Salesforce. Instead, reps must add subsequent emails from that thread or the updated event to Salesforce again.</p> <p>If you turned on <a href="#">shared activities</a> on page 1032, reps can manually add Outlook emails to multiple Salesforce records. Although this feature offers logging flexibility, it adds multiple versions of the same email in Salesforce, which can impact reporting. Shared activities also let reps manually add Outlook events to multiple contacts and to one other nonperson record, such as an opportunity or a case.</p>	<p>nonperson record. When subsequent activity occurs for manually added events in Outlook, corresponding updates aren't made in Salesforce.</p> <p>With Einstein Activity Capture, email and event capture automatically displays Outlook emails and events on the activity timeline of related Salesforce records. When subsequent activity occurs, the new activity is automatically displayed on the activity timeline. However, captured emails and events don't generate new records in Salesforce.</p>
Add emails and events to Salesforce from shared folders in Outlook.	Not available	<p>Available for the Outlook integration with limitations.</p> <p>If reps are delegated access to another teammate's email inbox or calendar, or a group has shared access to an email account, reps can log emails and events to Salesforce from those shared Outlook sources. See <a href="#">Considerations for Outlook Shared Folders in Outlook Integration</a>.</p>
Draft Outlook emails using Salesforce email templates.	Not available	Available for the Outlook integration.
See customers' email privacy settings directly from Outlook.	Not available	<p>Available for the Outlook integration.</p> <p>Without leaving Outlook, reps can see a contact or lead's email privacy preferences from Lightning Experience.</p>
Track whether events are calls, meetings, or other event types when adding an Outlook event to Salesforce.	Not available	<p>Available for the Outlook integration.</p> <p>To improve your business reporting and sales processes, reps can classify Salesforce event types directly from Outlook.</p>
Sync contacts and events.	Available	Available for Einstein Activity Capture.
Select contact sync directions.	<p>Available</p> <ul style="list-style-type: none"> <li>• Salesforce to Outlook</li> <li>• Both Ways</li> </ul>	<p>Available for Einstein Activity Capture with limitations.</p> <ul style="list-style-type: none"> <li>• Outlook to Salesforce</li> <li>• Salesforce to Outlook</li> <li>• Both Ways</li> </ul>

Feature	Salesforce for Outlook	Outlook Integration + Einstein Activity Capture
		Contact capture (which is used for email insights and recommended connections) isn't available when the Salesforce to Outlook sync direction is selected.
Select event sync directions.	Available <ul style="list-style-type: none"> <li>• Outlook to Salesforce</li> <li>• Salesforce to Outlook</li> <li>• Both Ways</li> </ul>	Available for Einstein Activity Capture with limitations. <ul style="list-style-type: none"> <li>• Outlook to Salesforce</li> <li>• Salesforce to Outlook</li> <li>• Both Ways</li> </ul> Event capture isn't available when the Salesforce to Outlook sync direction is selected.
Let reps choose which contacts and events sync.	Available Reps select which items sync using Microsoft Outlook categories.	Available with limitations; both products required. With Einstein Activity Capture sync, reps select the contacts that sync by moving them to a specific folder in Outlook. Reps can prevent events from syncing by creating a secondary Outlook calendar and moving events to it. (Only the default Outlook calendar syncs with Salesforce). Or if the private event sync option is disabled, reps can mark events as private. Or, with the Outlook integration, for behavior similar to manual event sync, reps can manually add Outlook events and their attachments to Salesforce records. This feature is called logging. However, unlike event sync, when subsequent activity occurs for manually added events, corresponding updates aren't made in Salesforce.
Sync repeating events.	Available with limitations Supports syncing recurring events only (repeating events created or edited in Salesforce Classic).	Available for Einstein Activity Capture with limitations. Supports syncing event series sync only (repeating events created or edited in Lightning Experience or the Salesforce mobile app).

Feature	Salesforce for Outlook	Outlook Integration + Einstein Activity Capture
Work with tasks.	Available Reps can sync tasks or relate Outlook tasks to Salesforce records from the side panel.	Available for the Outlook integration with limitations. Reps can see their Salesforce task list and create, edit, or mark Salesforce tasks as complete, all from the side panel. However, task sync isn't available, and reps can't relate Outlook tasks to Salesforce records from the side panel.
Set contact sync filters.	Available Admins can filter contact sync by: <ul style="list-style-type: none"> <li>• Object and field</li> <li>• Contact owner</li> <li>• Contacts related to opportunities</li> <li>• Contacts related to accounts</li> <li>• Sync contacts users follow in Chatter</li> </ul>	Available for Einstein Activity Capture with limitations. Admins can filter contact sync by: <ul style="list-style-type: none"> <li>• Field</li> <li>• Contact owner</li> <li>• Sync contacts users follow in Chatter</li> </ul>
Set event sync filters.	Available Admins can filter event sync by event end date.	Available for Einstein Activity Capture. Admins can filter event sync by: <ul style="list-style-type: none"> <li>• End date</li> <li>• Not including private events</li> <li>• Not including event series (repeating events created in Lightning Experience, the Salesforce mobile app, or Outlook).</li> </ul>
Sync custom fields.	Available	Not available.
Customize how standard fields are mapped.	Available	Available for Einstein Activity Capture.
Remove deleted contacts from the other application automatically.	Available	Not available. Deleted contacts can impact your sales data. We recommend that reps update the Contact Status field to indicate when a contact has left a company, is deceased, and so forth, rather than deleting the contact.
Sync event attendees.	Not available	Available for Einstein Activity Capture.
When events syncs from Outlook to Salesforce, sync any event attachments into Salesforce as well.	Outlook event attachments sync to Salesforce.	Not available.
See email engagement feedback and access meeting scheduling features.	Not available	Available for an extra cost when customers upgrade from the Outlook integration to Inbox. When they do, customers get these

Feature	Salesforce for Outlook	Outlook Integration + Einstein Activity Capture
		advanced features and more from the same add-in. See <a href="#">Outlook and Gmail Integration and Inbox Features</a> .
Access Einstein Email Insights.	Not available	Available for Einstein Activity Capture. Reps get critical sales context on relevant emails. Standard insights show up when, for example, a competitor is mentioned, pricing is discussed, or a meeting is requested. Paid Einstein Activity Capture users can create custom insights. See <a href="#">What Is Einstein Activity Capture Standard?</a>
Access Activity Metrics.	Not available Only standard Sales Cloud reporting tools are available.	Available with the paid version of Einstein Activity Capture. Reps see a summary of sales activity from list views, page layouts, and reports. Admins can also use Activity Metrics fields to automate processes using Process Builder and triggers. See <a href="#">What Is Einstein Activity Capture Standard?</a>

## SEE ALSO:

[Design Your Perfect Salesforce Email Integration](#)

## Considerations for Running Outlook Integration and Salesforce for Outlook (Retiring) Simultaneously

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

**!** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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

### SEE ALSO:

[Explore Email and Calendar Integration Products](#)

[How Salesforce Manages Sync Conflicts Between Products](#)

### EDITIONS

Outlook integration is available in Salesforce Classic and Lightning Experience in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer** editions.

Salesforce for Outlook is available in Salesforce Classic ([not available in all orgs](#)).

Salesforce for Outlook is available in Lightning Experience (if [Salesforce Classic is available in your org](#)).

Salesforce for Outlook is available in **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited,** and **Developer** editions.

## How Salesforce Manages Sync Conflicts Between Products

Learn how Salesforce manages conflicts when users are assigned to configurations for multiple products such as Einstein Activity Capture, Lightning Sync, and Salesforce for Outlook.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

### Conflicts Between Einstein Activity Capture and Lightning Sync

You can't enable both of these products simultaneously in the same Salesforce org.

### Sync Conflicts Between Salesforce for Outlook and Either Einstein Activity Capture or Lightning Sync

We recommend deactivating Salesforce for Outlook configurations before activating Einstein Activity Capture or Lightning Sync configurations that include the same users to sync. Though Salesforce manages some configuration conflicts between products, this best practice prevents you from creating complicated sync configurations that can become difficult to manage later.

**Note:** You can add the same users to Salesforce for Outlook configurations and to Einstein Activity Capture configurations with settings enabled for capture only. Using these features simultaneously doesn't present conflicts for users.

Salesforce gives sync preference to objects syncing with Einstein Activity Capture or Lightning Sync. However, because Salesforce gives preference by object, not by configuration type, either or both features can sync your reps' Microsoft® items.

For example, let's say that a user is assigned to sync contacts, events, and tasks in a Salesforce for Outlook configuration and to sync contacts and events in an Einstein Activity Capture configuration. The users' tasks sync with Salesforce for Outlook, and the users' contacts and events sync with Einstein Activity Capture.

If you don't deactivate Salesforce for Outlook configurations first, you can accidentally disable sync or create difficulties with your Salesforce for Outlook migration.

### SEE ALSO:

[Explore Email and Calendar Integration Products](#)

[Considerations for Running Outlook Integration and Salesforce for Outlook \(Retiring\) Simultaneously](#)

### EDITIONS

Einstein Activity Capture is available in Lightning Experience and all versions of the Salesforce mobile app in **Essentials, Professional, Enterprise, Performance, and Unlimited** Editions

Lightning Sync is available in Salesforce Classic ([not available in all orgs](#)), Lightning Experience, and all versions of the Salesforce mobile app in **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Salesforce for Outlook is available in Salesforce Classic ([not available in all orgs](#)) and Lightning Experience (if [Salesforce Classic is available in your org](#)) in **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## Salesforce for Outlook (Retiring) Supported Languages

Salesforce for Outlook supports these languages.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

- Chinese (Simplified)
- Chinese (Traditional)
- Czech
- Danish
- Dutch
- English
- German
- Finnish
- 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

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in:  
**Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

## Salesforce for Outlook (Retiring) System Requirements

Your computing environment must meet these system requirements to install and use Salesforce for Outlook.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

Basic Resource	Required Version
Salesforce for Outlook version	Salesforce for Outlook v3.0.0 or later after <a href="#">Salesforce Disables TLS 1.0</a> encryption protocol.
Default email program	<p>Any of the following versions of Microsoft® Outlook® with the latest updates.</p> <ul style="list-style-type: none"> <li>• 2016 (32 bit and 64 bit)</li> <li>• 2013 (32 bit and 64 bit)</li> <li>• 2010 (32 bit and 64 bit)</li> </ul> <p>Salesforce for Outlook supports Outlook installed using Click-to-Run (a streaming installer for Microsoft Office).</p>
Server	Salesforce for Outlook is compatible with any Microsoft Exchange server officially supported by Microsoft, including Exchange Online with Microsoft Office 365™, Exchange Online with GCC High, and on-premises Exchange servers.
Operating system	<p>Any of the following versions of Microsoft Windows®, along with the latest hot fixes.</p> <ul style="list-style-type: none"> <li>• Windows 10</li> <li>• Windows 8.1 (Pro and Enterprise)</li> <li>• Windows 7</li> </ul> <p>For customers using Apple® Mac OS®, consider setting up Outlook integration and Einstein Activity Capture.</p>
Browser	Microsoft Internet Explorer® 11 with TLS encryption protocol 1.1 or later enabled. IE11 isn't required to be set as default browser, but it must be installed on the user's operating system.

### Other Requirements

Other Features	Requirement
Server configurations	<p>We support using these systems that connect to the Internet through a proxy server.</p> <ul style="list-style-type: none"> <li>• Automatic proxy detection</li> </ul>

#### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

Other Features	Requirement
	<ul style="list-style-type: none"> <li>• Manual proxy</li> <li>• NTLM proxy authentication</li> </ul> <hr/> <p>We don't support using:</p> <ul style="list-style-type: none"> <li>• IMAP and POP3 email servers.</li> <li>• Terminal servers, such as Citrix® servers. Consider setting up the Outlook integration and Einstein Activity Capture.</li> <li>• Proxy Automatic Configuration files (.pac).</li> </ul>
Installers	<p>If you're an IT administrator and plan to use the <code>.msi</code> installer, you need to install the following tools.</p> <ul style="list-style-type: none"> <li>• Microsoft .NET Framework 4.5.2, 4.6, 4.6.1, or 4.6.2</li> <li>• Microsoft Visual Studio® 2010 Tools for Office Runtime</li> <li>• Primary Interop Assemblies (PIA) Redistributable for your version of Microsoft Outlook</li> </ul> <p>Windows 7 <code>.msi</code> users must run the command prompt as an administrator and then launch the installer from the command line. For example: <code>msiexec /i SalesforceForOutlook.msi</code>.</p>
Single Sign-On	<p>We support using either:</p> <ul style="list-style-type: none"> <li>• Delegated authentication</li> <li>• Security Assertion Markup Language (SAML) with My Domain</li> </ul>
	<hr/> <p>We don't support using a separate online identity provider for single sign-on.</p>

## SEE ALSO:

[Salesforce for Outlook \(Retiring\)](#)

[Install and Set Up Salesforce for Outlook \(Retiring\)](#)

[Salesforce for Outlook \(Retiring\) Supported Languages](#)

[Outlook and Gmail Integration](#)

[Einstein Activity Capture](#)

## View and Work with Salesforce for Outlook (Retiring) Records from 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
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

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

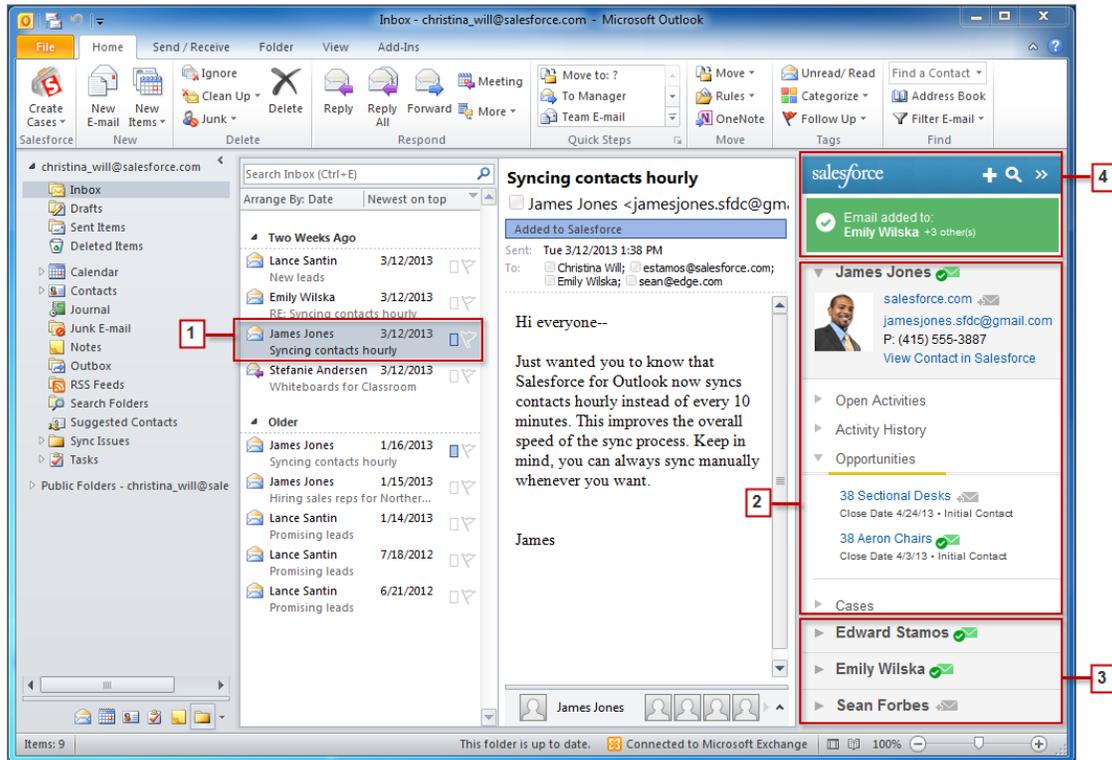
Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

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. [View and Work with Salesforce Records from Microsoft® Outlook®](#).

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

When you select an email from 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 **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.
- Includes a Search feature to find additional Salesforce records.
- Includes links to view full record details directly in Salesforce.

Here's how you 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 **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, click a record's link to open it directly in Salesforce.

To add your email or event to the Salesforce records of your choice, click  or  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 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 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 for Outlook \(Retiring\) 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 for Outlook \(Retiring\) 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 for Outlook \(Retiring\) 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 in Salesforce for Outlook \(Retiring\)](#)

Before the Salesforce for Outlook side panel action menu was retired in Summer '21, reps could create different kinds of records directly from the side panel in Microsoft® Outlook®. To continue creating records from Outlook, migrate to the Outlook integration.

#### [Search for Salesforce Records in Microsoft® Outlook®](#)

When you view details that appear in the Salesforce Side Panel, you can also 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.

#### [Get Familiar with Salesforce for Outlook \(Retiring\)](#)

#### SEE ALSO:

[Add Microsoft® Outlook® Emails to Salesforce Records](#)

[Create Records Directly from the Salesforce Side Panel in Salesforce for Outlook \(Retiring\)](#)

[Search 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

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in:  
**Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Keep track of important Outlook emails related to Salesforce records from the Salesforce Side Panel.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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 [Add Microsoft® Outlook® Emails to Salesforce Records](#).

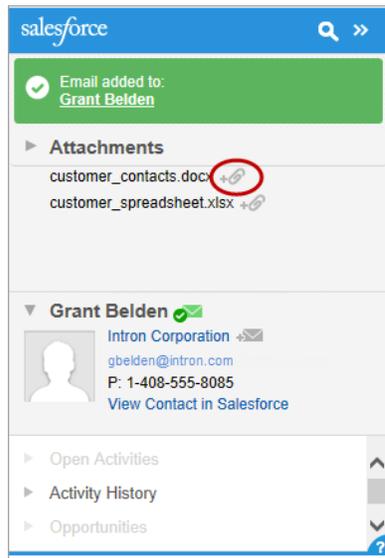
1. Make sure you've set up My Email to Salesforce. From your personal settings, enter *My Email to Salesforce* in the Quick Find box, then select **My Email to Salesforce**.
2. In Outlook, select an email from your Inbox or create an email.  
You can add an Outlook email and its attachments to multiple 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  to 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](#)

[Search for Salesforce Records in Microsoft® Outlook®](#)

[Remove Microsoft® Outlook® Emails from Salesforce for Outlook \(Retiring\) Records](#)

## Remove Microsoft® Outlook® Emails from Salesforce for Outlook (Retiring) 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 <code>Email to Salesforce</code>
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

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in:  
**Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

You can remove Microsoft Outlook emails from your Salesforce records with the Side Panel for Salesforce for Outlook.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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 [Add Microsoft® Outlook® Emails to Salesforce Records](#).

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](#)

[Search for Salesforce Records in Microsoft® Outlook®](#)

## Add Microsoft® Outlook® Events to Salesforce for Outlook (Retiring) 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.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in:  
**Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

### USER PERMISSIONS

To display the Salesforce Side Panel in Outlook:

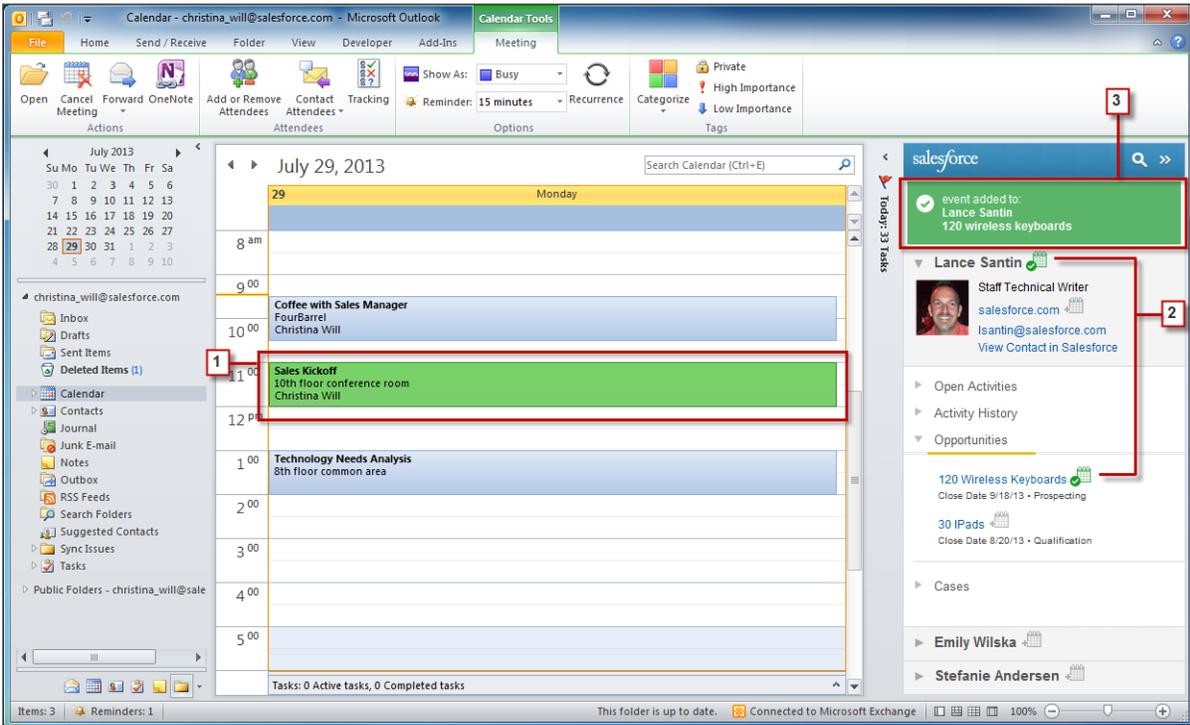
- Side Panel in your Outlook configuration

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  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 for Outlook (Retiring) 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.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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  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

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in:  
**Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

### USER PERMISSIONS

To display the Salesforce Side Panel in Outlook:

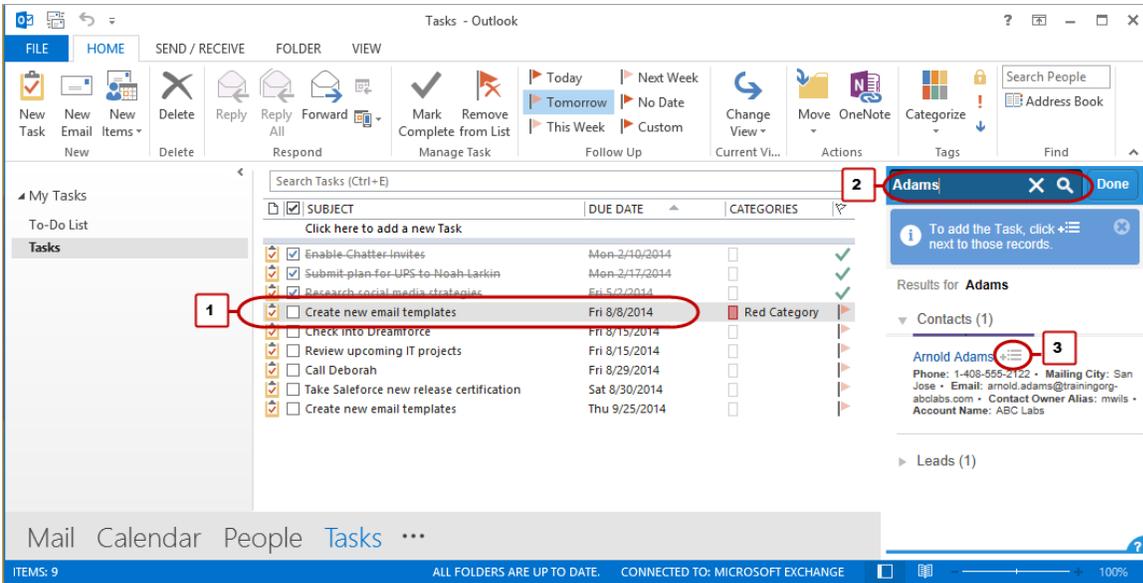
- Side Panel in your Outlook configuration

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 in Salesforce for Outlook (Retiring)

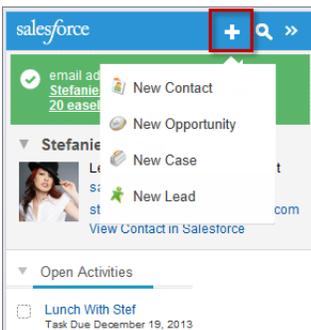
Before the Salesforce for Outlook side panel action menu was retired in Summer '21, reps could create different kinds of records directly from the side panel in Microsoft® Outlook®. To continue creating records from Outlook, migrate to the Outlook integration.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

Depending on how your administrator set up your action menu, you can create accounts, cases, contacts, leads, opportunities, and other types of records customized for your organization—directly from the side panel.

1. 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

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in:  
**Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

### USER PERMISSIONS

To display the Salesforce Side Panel:

- Side Panel in Outlook configurations

To create 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

- Click to save the record.  
Keep in mind that email attachments aren't included in the created records.

SEE ALSO:

[Outlook and Gmail Integration](#)

## Search 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 <code>Email to Salesforce</code>
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

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

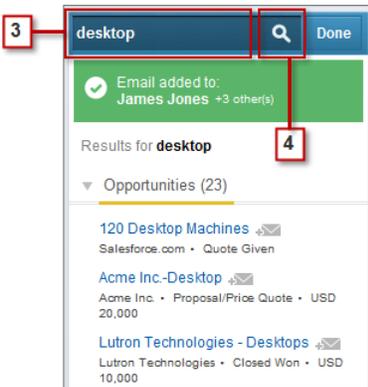
Available with the purchase of Sales Cloud or Government Cloud in:  
**Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

When you view details that appear in the Salesforce Side Panel, you can also 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.

**!** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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 [Add Microsoft® Outlook® Emails to Salesforce Records](#).

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 for Outlook \(Retiring\) Records from Microsoft® Outlook®](#)  
[Add Microsoft® Outlook® Emails to Salesforce Records](#)

## Syncing Between Salesforce for Outlook (Retiring) and Microsoft® Outlook®

Stop duplicating your contacts, events, and tasks in Outlook and Salesforce and start syncing between the two systems with Salesforce for Outlook.

User permissions needed to sync	When you sync	You'll Need
Contacts	From Salesforce to Outlook	"Read" on contacts; Contacts sync direction set to <i>Salesforce to Outlook</i>
	Both ways	"Read" and "Edit" on contacts, and "Read" on accounts; Contacts sync direction set to <i>Sync both ways</i>
Events and tasks	From Outlook to Salesforce:	"Read" and "Edit" on events; Events and Tasks sync direction set to <i>Outlook to Salesforce</i>
	From Salesforce to Outlook	"Read" and "Edit" on events; Events and Tasks sync direction set to <i>Salesforce to Outlook</i>
	Both ways	"Read" and Edit" on events; Events and Tasks sync direction set to <i>Sync both ways</i>
	Multiday events	"Enable Multiday Events" on activities
	Recurring Salesforce tasks to Outlook	"Sync recurring Salesforce tasks to Outlook"

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

**!** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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 in Salesforce for Outlook (Retiring)

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 in Salesforce for Outlook (Retiring)

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 in Salesforce for Outlook (Retiring)

### [How Your Contacts Sync with Salesforce for Outlook \(Retiring\)](#)

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.

### [How Events Sync with Salesforce for Outlook \(Retiring\)](#)

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, such as 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.

### [How Recurring Events Sync with Salesforce for Outlook \(Retiring\)](#)

Salesforce for Outlook syncs Salesforce recurring events (repeating events created in Salesforce Classic) with Microsoft Outlook calendars.

### [How Tasks Sync with Salesforce for Outlook \(Retiring\)](#)

Keep Microsoft® Outlook® and Salesforce tasks in sync.

### [Automatic Account Assignments for Synced Contacts in Salesforce for Outlook \(Retiring\)](#)

After syncing contacts from Outlook, Salesforce for Outlook tries to automatically assign them to accounts.

## SEE ALSO:

[How Your Contacts Sync with Salesforce for Outlook \(Retiring\)](#)

[How Events Sync with Salesforce for Outlook \(Retiring\)](#)

[How Tasks Sync with Salesforce for Outlook \(Retiring\)](#)

[My Unresolved Items](#)

## How Your Contacts Sync with Salesforce for Outlook (Retiring)

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.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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 for Outlook lets you sync up to 5,000 contacts, and isn't case-sensitive when matching contacts.

- *Salesforce to Outlook*
- *Sync both ways*

This diagram shows how contacts sync.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

### USER PERMISSIONS

To sync contacts from Salesforce to Outlook:

- Read on contacts

AND

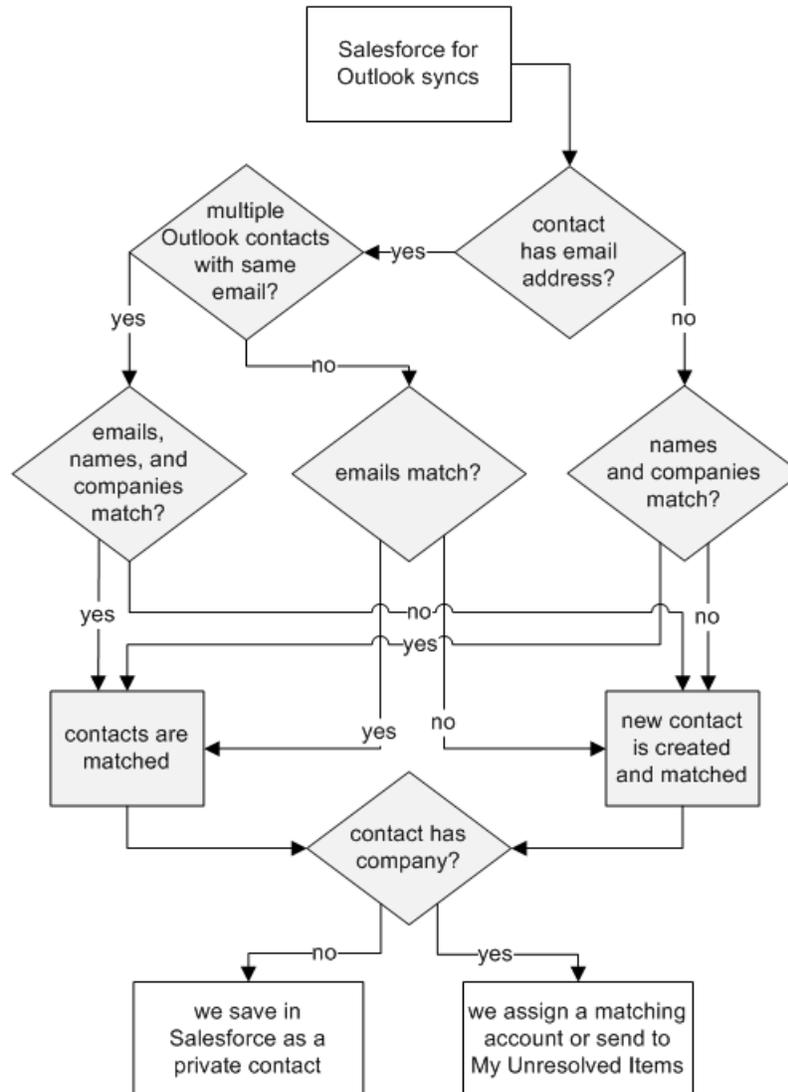
Contact sync direction set to *Salesforce to Outlook*

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

A contact exists in Outlook

A contact doesn't yet exist in Outlook

You delete a contact in Outlook

Multiple matching contacts exist in Outlook

You update a contact in Salesforce

### Then

The Salesforce contact replaces the Outlook contact and the two are synced.

Salesforce for Outlook syncs the Salesforce contact, which creates the contact in Outlook.

Salesforce for Outlook doesn't sync the Salesforce contact again.

Salesforce for Outlook selects one of them and syncs it.

The Salesforce contact overwrites the Outlook contact.

If	Then
You update a contact in Outlook	The updates remain in the Outlook contact, but doesn'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, 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.

 **Note:** Contact sync doesn't support Outlook categories, so contacts labeled with a Salesforce\_Sync category that don't exist in a contacts subfolder of the same name don't sync with Salesforce. To avoid this issue, disable contact categories and select the Salesforce\_Sync folder for new contacts in Outlook. See [EAC - New Contacts Created In Outlook with 'Salesforce\\_Sync' Category Do Not Sync to Salesforce](#).

SEE ALSO:

[Syncing Between Salesforce for Outlook \(Retiring\) and Microsoft® Outlook®](#)  
[Resolve Your Synced Contacts](#)

## How Events Sync with Salesforce for Outlook (Retiring)

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, such as 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.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

### 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*.

**Note:** Event updates stop syncing when 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, events that have occurred in the past (unless those events fall within an event filter that you've set), and recurring events that are created in Lightning Experience or the Salesforce mobile app (referred to as event series). 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 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 an event.

### 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.

#### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer 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

## Who Sees Synced Events in Salesforce

Events that aren't marked as private are visible in 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 in Salesforce for Outlook (Retiring)

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 Salesforce for Outlook \(Retiring\) and Microsoft® Outlook®](#)

[Resolve Your Synced Events](#)

[How Recurring Events Sync with Salesforce for Outlook \(Retiring\)](#)

## How Recurring Events Sync with Salesforce for Outlook (Retiring)

Salesforce for Outlook syncs Salesforce recurring events (repeating events created in Salesforce Classic) with Microsoft Outlook calendars.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

Salesforce for Outlook syncs recurring events, which are repeating events created in Salesforce Classic. It doesn't sync event series, which are repeating events created in your Outlook calendar, Lightning Experience, or the Salesforce app). To sync event series between your Outlook calendar and Lightning Experience or the Salesforce app, consider [migrating to Einstein Activity Capture](#).

If you're set up to sync recurring events using Salesforce for Outlook, you can sync recurrences with these patterns. After you sync recurring events to Salesforce, you can relate these events with Salesforce records, including contacts, accounts, and opportunities. Syncing recurring events also helps you maintain an accurate view of your availability when you create events and request meetings from your Salesforce calendar.

- Daily
- Weekly
- Monthly
- Yearly

Recurring events don't appear on the My Unresolved Items page. Instead, go directly to the recurring events in your calendar and use the side panel to associate the recurring events with Salesforce records.

### Differences Between Outlook and Salesforce Classic Recurring Events

Recurring events work differently in Outlook than they do in Salesforce Classic.

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 <b>weekend day</b> .
Yearly occurrences	Salesforce for Outlook only lets you sync yearly events that recur every year. You can't sync events that recur every other year or every three years. If you enter a number other than <b>1</b> for the <b>Recur every</b> option in Outlook recurrence patterns, Salesforce for Outlook doesn't sync the recurring event series.  Salesforce for Outlook doesn't support the Outlook recurrence pattern option <b>weekend day</b> .

#### EDITIONS

Recurring events are available in Salesforce Classic only.

Salesforce for Outlook is available in Salesforce Classic and in Lightning Experience, if [Salesforce Classic is available in your org](#). Salesforce for Outlook is available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

#### USER PERMISSIONS

To sync Salesforce Classic recurring events between Outlook and Salesforce:

- Recurring Events
  - Read and Edit events

<b>For</b>	<b>You should know that</b>
Events lasting longer than 24 hours	Salesforce doesn't support recurring events lasting longer than 24 hours.

## Modifying Recurring Event Series

You can modify recurring event series, but it's good to know what to avoid, so that you don't lose any details for individual event occurrences that you've modified.

<b>If you modify</b>	<b>You should know that</b>
Recurring event series in Outlook	<p>Modifications are handled differently depending on which fields you modify.</p> <p>Changes to some fields are considered to be critical changes. If you make critical changes to your recurring event 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:</p> <ul style="list-style-type: none"> <li>• Appointment times (StartDateTime, Duration)</li> <li>• Recurrence patterns (RecurrenceType, Instance, Interval, DayOfMonth, DayOfWeekMask, MonthOfYear, DayOfWeekIndex)</li> <li>• Ranges of occurrences (Occurrences, EndDateOnly, EndKind)</li> </ul> <p>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.</p> <p>On the other hand, non-critical changes (changes to other event fields) that you make to a recurring event doesn't propagate to individually modified events. Likewise, the non-critical changes that you make sync to Salesforce for the recurring event, but the individually modified events don't sync.</p>
Start dates for recurring event series in Outlook	Salesforce doesn't support modifications to start dates that already occurred.
End dates for recurring event series in Salesforce	A critical change in Outlook, and clears any modifications you make to individual occurrences within the series. Those modifications don't propagate to Outlook. You can, however, modify end dates in Outlook, but that type of critical change clears all modifications you've made to individual occurrences—in both Outlook and Salesforce.
Individual occurrences	<ul style="list-style-type: none"> <li>• You can lose those changes if you make critical changes to the recurring event series.</li> <li>• 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.</li> </ul> <p>For example, you change your recurring event in Outlook. You delete the October 4 occurrence, and move the October 5 occurrence into its place. In Salesforce, you'll see two occurrences on October 4: the one you deleted, and the one you moved into its place. For October 5, you'll have no occurrences.</p>

**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.
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## SEE ALSO:

[Syncing Between Salesforce for Outlook \(Retiring\) and Microsoft® Outlook®](#)

[Resolve Your Synced Events](#)

[How Events Sync with Salesforce for Outlook \(Retiring\)](#)

## How Tasks Sync with Salesforce for Outlook (Retiring)

Keep Microsoft® Outlook® and Salesforce tasks in sync.

**!** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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
- 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.

#### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer 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*

## 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, 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 Salesforce for Outlook \(Retiring\) and Microsoft® Outlook®](#)  
[Resolve Your Synced Outlook Tasks](#)

## Automatic Account Assignments for Synced Contacts in Salesforce for Outlook (Retiring)

After syncing contacts from Outlook, Salesforce for Outlook tries to automatically assign them to accounts.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

After syncing contacts from Outlook, Salesforce for Outlook tries to automatically assign them to accounts, as shown in this diagram.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in:  
**Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

### USER PERMISSIONS

To assign accounts:

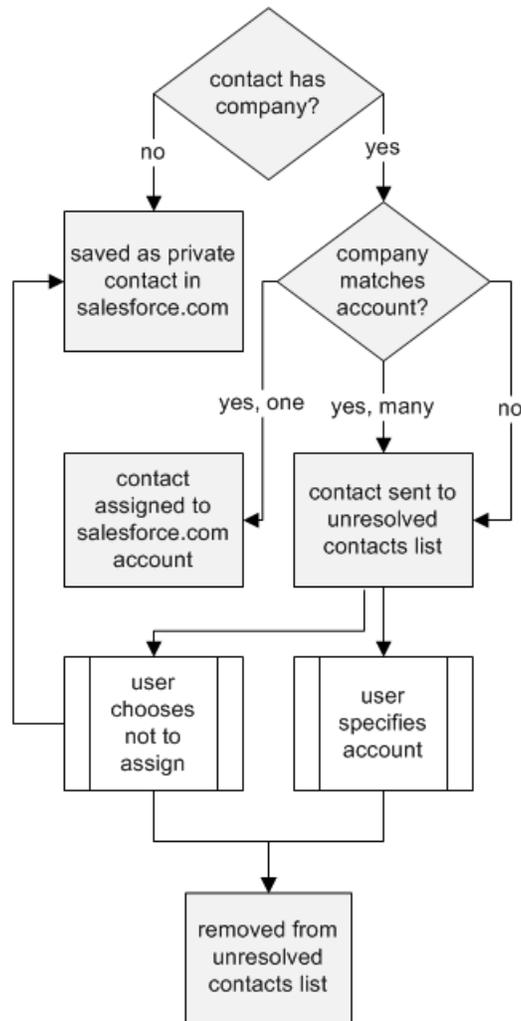
- Read on accounts and Edit on contacts

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.
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.

<b>If</b>	<b>Then</b>
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 \(Retiring\)](#)

[Resolve Your Synced Contacts](#)

[Manage Your Salesforce for Outlook \(Retiring\) Configuration](#)

## Create Cases from the Outlook Ribbon with Salesforce for Outlook (Retiring)

If you track cases in Salesforce, you can create ones from your Microsoft® Outlook® emails. Your administrator needs to first create Email-to-Case destinations that appear in the dropdown list 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.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

If you don't see the **Create Cases** dropdown list button in Microsoft® Outlook®, contact your administrator, who can enable this feature.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in:  
**Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

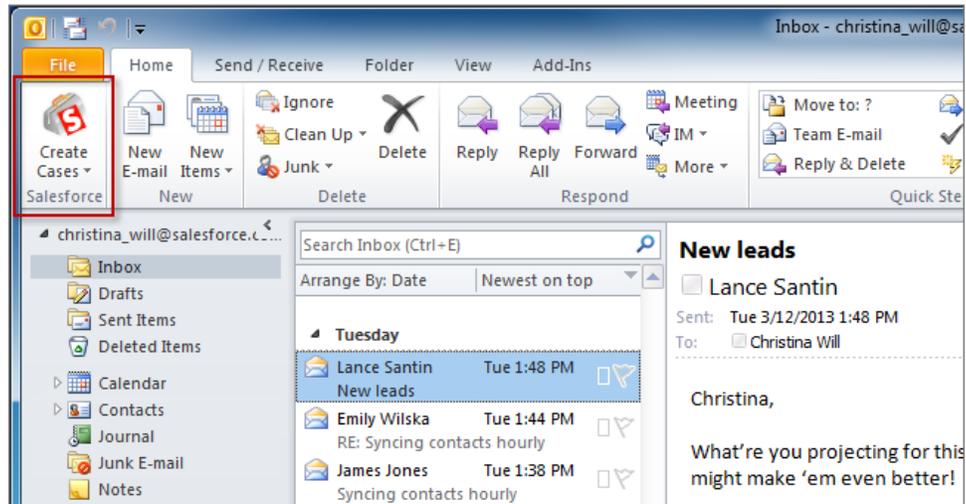
### USER PERMISSIONS

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



1. In Outlook, select up to 10 sent or received emails and click **Create Cases**.
2. Select a destination from the dropdown list. Salesforce for Outlook adds the emails you selected as a case in Salesforce.

SEE ALSO:

[Create Records Directly from the Salesforce Side Panel in Salesforce for Outlook \(Retiring\)](#)

[Edit Your Salesforce for Outlook \(Retiring\) Email Settings](#)

[Access Salesforce for Outlook Settings and Tools \(Retiring\)](#)

## Salesforce for Outlook (Retiring) 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.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

### Salesforce for Outlook Configurations

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**.

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.

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.

### 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 \(Retiring\) 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 want to define unique settings for a subset of your sales team, create multiple Outlook configurations, and assign reps accordingly.

#### [Define Datasets for Salesforce for Outlook \(Retiring\)](#)

Datasets consist of filters that limit what records sync. Each configuration must have a dataset in order for users to sync with Outlook.

#### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in:  
**Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

#### USER PERMISSIONS

To view configurations:

- View Setup and Configuration

To create, edit, or delete configurations:

- Manage Email Client Configurations

### [Track the Versions of Salesforce for Outlook \(Retiring\) 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 \(Retiring\)](#)
- [Create Salesforce for Outlook \(Retiring\) Configurations](#)
- [Define Datasets for Salesforce for Outlook \(Retiring\)](#)
- [Salesforce for Outlook \(Retiring\) Default Configurations](#)
- [Email Application Publisher Layouts](#)

## Create Salesforce for Outlook (Retiring) 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 want to define unique settings for a subset of your sales team, create multiple Outlook configurations, and assign reps accordingly.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

When first time Salesforce for Outlook users log into 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.

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**.

#### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in:  
**Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

#### USER PERMISSIONS

To view configurations:

- [View Setup and Configuration](#)

To create, edit, or delete configurations:

- [Manage Email Client Configurations](#)

## 8. Define data sets.

### [Assign Users to Salesforce for Outlook \(Retiring\) 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.

### [Define Data Settings for Salesforce for Outlook \(Retiring\)](#)

Data settings control the sync behavior and email functionality of Salesforce for Outlook. You can define these settings using the Data Settings fields in a Salesforce for Outlook configuration.

### [Set Up Email Options for Salesforce for Outlook \(Retiring\)](#)

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 \(Retiring\) Users](#)

Your Salesforce and API users can expect the following changes after you enable the Salesforce for Outlook Recurring Events feature.

### [Set Up Create Case for Salesforce for Outlook \(Retiring\) 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 dropdown 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.

### [Define Sync Directions for Your Salesforce for Outlook \(Retiring\) 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 \(Retiring\)](#)

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.

### [Customize the Fields That Sync Between Salesforce for Outlook \(Retiring\) 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 \(Retiring\)](#)

Define how Salesforce for Outlook handles multiple matching Salesforce contacts when a contact first syncs from Outlook.

### [Let Users Modify Salesforce for Outlook \(Retiring\) Settings](#)

Let users modify their own Salesforce for Outlook settings by editing users' Outlook configurations in Setup. After you do, users can modify their settings from their Personal Settings in Salesforce.

### [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 \(Retiring\)](#)

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.

### [Salesforce for Outlook \(Retiring\) Default Configurations](#)

Learn about sync settings that come with Salesforce for Outlook if you don't add them to custom Outlook configurations.

#### SEE ALSO:

[Salesforce for Outlook \(Retiring\)](#)

[Salesforce for Outlook \(Retiring\) Default Configurations](#)

## Assign Users to Salesforce for Outlook (Retiring) 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.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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. In the Assign Users and Profiles section, select either *Profiles* or *Users* in the **Search** dropdown 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 \(Retiring\) Configurations](#)

[Salesforce for Outlook \(Retiring\) Configurations and Email Application Publisher Layouts](#)

[Set Up Email Options for Salesforce for Outlook \(Retiring\)](#)

#### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in:  
**Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer 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 (Retiring)

Data settings control the sync behavior and email functionality of Salesforce for Outlook. You can define these settings using the Data Settings fields in a Salesforce for Outlook configuration.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

- [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

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer 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 (Retiring)

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.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

Enable the Salesforce Side Panel

Let your sales reps see Salesforce contacts and leads that are relevant to your reps' emails and events.

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. 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.

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 Email* 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.

### EDITIONS

Available in: Salesforce Classic (**not available in all orgs**)

Available in: Lightning Experience, if **Salesforce Classic is available in your org**.

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer 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

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 dropdown 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.

 **Note:** Before you can enable the Create Case feature, review and complete the procedures in [Set Up Create Case for Salesforce for Outlook \(Retiring\) Users](#) on page 697. Then, return to this topic to complete this procedure.

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. Clear the **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 \(Retiring\) Email Settings](#)

[Create Salesforce for Outlook \(Retiring\) Configurations](#)

[Assign Users to Salesforce for Outlook \(Retiring\) Configurations](#)

[Email Application Publisher Layouts](#)

## Learn How Enabling Recurring Events Affects Salesforce for Outlook (Retiring) Users

Your Salesforce and API users can expect the following changes after you enable the Salesforce for Outlook Recurring Events feature.

**!** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

For	You should know that
Salesforce users	<p>Changes made to a series don't affect past events.</p> <p>Changes made to the following fields in an event series override changes previously made to single events.</p> <ul style="list-style-type: none"> <li>• Event start or end time</li> <li>• All-day event</li> <li>• Frequency</li> <li>• Recurrence start date, if a user sends updates to invitees</li> </ul> <p>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.</p>
API users	<p>After users start syncing recurring events, the following read-only API objects appear in the API.</p> <ul style="list-style-type: none"> <li>• EventRecurrenceException</li> <li>• TaskRecurrenceException</li> </ul>

### SEE ALSO:

[Set Up Email Options for Salesforce for Outlook \(Retiring\)](#)

[Salesforce for Outlook \(Retiring\) Configurations and Email Application Publisher Layouts](#)

### EDITIONS

Recurring events are available in Salesforce Classic only.

Salesforce for Outlook is available in Salesforce Classic and in Lightning Experience, if [Salesforce Classic is available in your org](#). Salesforce for Outlook is available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

## Set Up Create Case for Salesforce for Outlook (Retiring) 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 dropdown 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.

**!** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

Before Salesforce for Outlook users can create cases from Outlook emails, you need to perform the following procedures. 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.

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** dropdown list button in Outlook.

### SEE ALSO:

[Email Application Publisher Layouts](#)

[Create Salesforce for Outlook \(Retiring\) Configurations](#)

[Set Up Email Options for Salesforce for Outlook \(Retiring\)](#)

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

## Define Sync Directions for Your Salesforce for Outlook (Retiring) Users

Set sync directions for sales reps who sync contacts, events, and tasks between Microsoft® Outlook® and Salesforce.

- Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).
- From Setup, enter *Outlook Configurations* in the **Quick Find** box, then select **Outlook Configurations**.
  - 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.
  - Click **Save**. All changes take effect the next time data syncs for the users in this configuration.
  - Define a dataset for each object that has a sync direction.

### SEE ALSO:

- [Salesforce for Outlook \(Retiring\) Configurations and Email Application Publisher Layouts](#)
- [Set Up Email Options for Salesforce for Outlook \(Retiring\)](#)
- [Create Salesforce for Outlook \(Retiring\) Configurations](#)
- [Define Datasets for Salesforce for Outlook \(Retiring\)](#)

### EDITIONS

Available in: Salesforce Classic (**not available in all orgs**)

Available in: Lightning Experience, if **Salesforce Classic is available in your org**.

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer 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 (Retiring)

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.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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:

[Salesforce for Outlook \(Retiring\) Configurations and Email Application Publisher Layouts](#)

[Create Salesforce for Outlook \(Retiring\) Configurations](#)

[Customize the Fields That Sync Between Salesforce for Outlook \(Retiring\) and Microsoft® Outlook®](#)

[Define Sync Directions for Your Salesforce for Outlook \(Retiring\) Users](#)

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

### USER PERMISSIONS

To view configurations:

- View Setup and Configuration

To create, edit, or delete configurations:

- Manage Email Client Configurations

## Customize the Fields That Sync Between Salesforce for Outlook (Retiring) 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.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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.

1. From Setup, enter *Outlook Configurations* in the Quick Find box, then select **Outlook Configurations**.
2. Select an Outlook Configuration you want to edit, or create one.
3. Under Data Settings, click **Edit Field Mappings** under *Contacts*, *Events*, or *Tasks* to display all the fields for records on that object.
4. Review what Salesforce fields are mapping to each Outlook field.
5. Edit the Salesforce or Outlook field mappings you want 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.

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 \(Retiring\) Configurations](#)

[Salesforce for Outlook \(Retiring\) Configurations and Email Application Publisher Layouts](#)

[Define Matching Criteria for Salesforce for Outlook \(Retiring\)](#)

[Define Conflict Behavior for Salesforce for Outlook \(Retiring\)](#)

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

### USER PERMISSIONS

To view configurations:

- View Setup and Configuration

To create, edit, or delete configurations:

- Manage Email Client Configurations

## Define Matching Criteria for Salesforce for Outlook (Retiring)

Define how Salesforce for Outlook handles multiple matching Salesforce contacts when a contact first syncs from Outlook.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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.

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.

### SEE ALSO:

[Create Salesforce for Outlook \(Retiring\) Configurations](#)

[Salesforce for Outlook \(Retiring\) Configurations and Email Application Publisher Layouts](#)

[Customize the Fields That Sync Between Salesforce for Outlook \(Retiring\) and Microsoft® Outlook®](#)

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer 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 (Retiring) Settings

Let users modify their own Salesforce for Outlook settings by editing users' Outlook configurations in Setup. After you do, users can modify their settings from their Personal Settings in Salesforce.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

You can overwrite users' modifications anytime 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.

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.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer 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.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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, where *Contacts* is your users' default contacts folder, and *sfdc\_sync\_contacts* is the folder where you want your users' Salesforce contacts to sync.

The screenshot shows the 'Contacts' configuration page. It includes sections for 'Sync Direction' (set to 'Sync both ways'), 'Conflict Behavior' (set to 'Salesforce always wins'), and 'Edit Field Mappings' (with 'Has the most recent activity' selected). At the bottom, the 'Allow users to modify:' section is expanded, showing 'Outlook folder for syncing contacts' selected. The text box next to it contains the path 'Contacts\sfdc\_sync\_contacts'.

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."

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

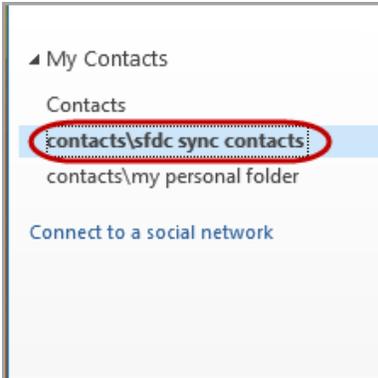
Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

### USER PERMISSIONS

To create and edit Outlook configurations:

- Configure Application



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 (📧) 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.

-  **Note:** Contact sync doesn't support Outlook categories, so contacts labeled with a Salesforce\_Sync category that don't exist in a contacts subfolder of the same name don't sync with Salesforce. To avoid this issue, disable contact categories and select the Salesforce\_Sync folder for new contacts in Outlook. See [EAC - New Contacts Created In Outlook with 'Salesforce\\_Sync' Category Do Not Sync to Salesforce](#).

## Define Advanced Settings for Salesforce for Outlook (Retiring)

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.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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**.
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. Click **Add Advanced Setting** in the Advanced Settings section of an Outlook configuration.
4. Choose one of these settings and enter a value.
  - `HTTPTimeout`, which specifies the number of seconds Salesforce for Outlook waits while trying to establish an HTTP connection with Salesforce. The value must be 15–360 seconds. The default is 30.
  - `MaxLogFileSize`, which specifies the maximum file size of the sync log you maintain. Value must be 1–128 MB, and the default is 1.
  - `MaxRetries`, which specifies the number of times Salesforce for Outlook tries to connect to Salesforce. The value must be from 0 through 10. The default is 3.
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 \(Retiring\) Configurations](#)

[Salesforce for Outlook \(Retiring\) Configurations and Email Application Publisher Layouts](#)

[Define Datasets for Salesforce for Outlook \(Retiring\)](#)

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

### USER PERMISSIONS

To view configurations:

- View Setup and Configuration

To create, edit, or delete configurations:

- Manage Email Client Configurations

## Salesforce for Outlook (Retiring) Default Configurations

Learn about sync settings that come with Salesforce for Outlook if you don't add them to custom Outlook configurations.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

The setting for	Is
Salesforce Side Panel	Enabled
Add Email	Enabled
Contacts	<ul style="list-style-type: none"> <li>• Sync Direction—<i>Sync both ways</i></li> <li>• Conflict Behavior—<i>Outlook always wins</i></li> <li>• Filters           <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;">             Contacts: User's Records              Contacts on Accounts: User's Records              Contacts in Chatter: Records User is Following           </div> </li> <li>• Field Mapping—<i>Default settings</i></li> <li>• Matching Criteria—<i>Most recent activity</i></li> </ul>
Events	<ul style="list-style-type: none"> <li>• Sync Direction—<i>Sync both ways</i></li> <li>• Conflict Behavior—<i>Outlook always wins</i></li> <li>• Filters           <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;">             User's Records              Date greater or equal to LAST 30 DAYS           </div> </li> <li>• Field Mapping—<i>Default settings</i></li> </ul>
Tasks	<ul style="list-style-type: none"> <li>• Sync Direction—<i>Sync both ways</i></li> <li>• Conflict Behavior—<i>Salesforce always wins</i></li> <li>• Filters           <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;">             User's Records              Due date greater or equal to LAST 30 DAYS           </div> </li> <li>• Field Mapping—<i>Default settings</i></li> </ul>

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## Define Datasets for Salesforce for Outlook (Retiring)

Datasets consist of filters that limit what records sync. Each configuration must have a dataset in order for users to sync with Outlook.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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 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 datasets related list, click **Edit**.
4. Specify filters.
5. To see how many items sync with the filters you've specified, you can check the dataset size.
6. Click **Save**.

[Learn about Datasets for Salesforce for Outlook \(Retiring\)](#)

[Configure Contact Filters for Salesforce for Outlook \(Retiring\)](#)

Specify which contacts sync between Microsoft® Outlook® and Salesforce for your sales teams.

[Salesforce for Outlook \(Retiring\) Contact Filters](#)

Contact filters control the number of records that Salesforce for Outlook users can sync between Outlook and Salesforce. Review these tips when using contact filters.

[Configure Event Filters for Lightning Sync and Salesforce for Outlook \(Retiring\)](#)

Specify which events sync between Microsoft® Outlook® and Salesforce for your sales teams.

[Create Task Filters for Salesforce for Outlook \(Retiring\)](#)

Specify which tasks sync between Microsoft® Outlook® and Salesforce for your sales teams.

[Sample Lightning Sync and Salesforce for Outlook \(Retiring\) Datasets](#)

Because users with the same role usually have similar data sync requirements, many administrators create sync configurations based on the positions in their organization. The following sample datasets are 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

Available in: Salesforce Classic (**not available in all orgs**)

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer 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 datasets:

- Sync Direction can't be *Don't sync*

### [Check the Size of Salesforce for Outlook \(Retiring\) Datasets](#)

You can use the Get Record Count button to check how many records 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.

#### SEE ALSO:

[Sample Lightning Sync and Salesforce for Outlook \(Retiring\) Datasets](#)

[Salesforce for Outlook \(Retiring\) Contact Filters](#)

[Salesforce for Outlook \(Retiring\) Configurations and Email Application Publisher Layouts](#)

[Check the Size of Salesforce for Outlook \(Retiring\) Datasets](#)

## Learn about Datasets for Salesforce for Outlook (Retiring)

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

Datasets consist of filters that limit what 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 Datasets

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 don't sync some of them. In addition, users find that syncing these large quantities of records can slow down the sync process. You can, however, increase the limits for the number of records users can sync. Keep in mind that you can't reduce the likelihood of the sync process slowing down.

### Increasing Limits to Datasets

If your users are working with more than 5,000 records, you can configure their datasets so that they can sync larger quantities of records. Edit their datasets 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 dataset now has three filters, your users can now sync up to 15,000 contact records.

Keep in mind that these various filters you set up don't necessarily select records that are mutually exclusive. Therefore, the sync process doesn't sync exactly 15,000 records. To avoid this situation, you can further refine the group of contacts you want to sync. Define additional parameters under Filter By Additional Objects and Fields.

#### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer 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 datasets:

- Sync Direction can't be *Don't sync*

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, your users can 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 expect to sync.

### SEE ALSO:

- [Configure Contact Filters for Salesforce for Outlook \(Retiring\)](#)
- [Configure Event Filters for Lightning Sync and Salesforce for Outlook \(Retiring\)](#)
- [Create Task Filters for Salesforce for Outlook \(Retiring\)](#)
- [Check the Size of Salesforce for Outlook \(Retiring\) Datasets](#)

## Configure Contact Filters for Salesforce for Outlook (Retiring)

### USER PERMISSIONS

To view configurations:	View Setup and Configuration
To create, edit, or delete configurations:	Manage Email Client Configurations
To filter contacts by opportunity teams:	Opportunity Team Selling
To filter contacts by account teams:	Account Teams
To create, edit, or delete datasets :	Sync Direction can't be <i>Don't sync</i>

Specify which contacts sync between Microsoft® Outlook® and Salesforce for your sales teams.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

Datasets consist of filters that limit what records sync. For example, you 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.

**Note:** If your company uses Platform Encryption, you can't set filters on fields you encrypted. Otherwise, Salesforce for Outlook can't sync contacts, events, or tasks for users assigned to that configuration.

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.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

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 Opportunities	Contacts related to their opportunities	User's Records
	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 the 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 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 \(Retiring\) Contact Filters](#)
- [Define Datasets for Salesforce for Outlook \(Retiring\)](#)
- [Check the Size of Salesforce for Outlook \(Retiring\) Datasets](#)
- [Sample Lightning Sync and Salesforce for Outlook \(Retiring\) Datasets](#)

## Salesforce for Outlook (Retiring) Contact Filters

Contact filters control the number of records that Salesforce for Outlook users can sync between Outlook and Salesforce. Review these tips when using contact filters.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

- 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.
- 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, `Amount equals` returns records with blank amount fields. You can search for blank values or other specified values at the same time. For example, `Amount equals 1,,2` returns records where the `Amount` is blank or contains the value "1" or "2". For example, if you create a workflow a filter for accounts with the criteria `Annual Revenue less than 100000`, account records match if their `Annual Revenue` 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 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 these merge fields to them.

Merge Field	Description
<code>CurrentUser.ID</code>	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 mobile view filters that reference an owner field, you can only use the <code>CurrentUser.ID</code> merge field.
<code>CurrentUser.Username</code>	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.

### EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: Lightning Experience, if Salesforce Classic is available in your org.

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

<b>Merge Field</b>	<b>Description</b>
<code>\$User.Firstname</code>	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.
<code>\$User.Lastname</code>	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.
<code>\$User.Fullname</code>	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 \(Retiring\)](#)

[Define Datasets for Salesforce for Outlook \(Retiring\)](#)

[Check the Size of Salesforce for Outlook \(Retiring\) Datasets](#)

## Configure Event Filters for Lightning Sync and Salesforce for Outlook (Retiring)

Specify which events sync between Microsoft® Outlook® and Salesforce for your sales teams.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

Datasets consist of filters that limit what records sync. For example, most users sync only current and future events, while some users 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 sync for a sample Salesforce for Outlook user based on the configuration's filters.
4. Save the dataset.

**Note:** The following items don't sync: all-day events beginning on the first day you're configured to sync, event attendees, events that have occurred in the past (unless those events fall within an event filter that you've set), and recurring events that are created in Lightning Experience or the Salesforce mobile app (referred to as event series). Multiday events sync as single events in either direction. Multi-day events do sync.

### SEE ALSO:

- [Sample Lightning Sync and Salesforce for Outlook \(Retiring\) Datasets](#)
- [Check the Size of Salesforce for Outlook \(Retiring\) Datasets](#)
- [How Events Sync with Salesforce for Outlook \(Retiring\)](#)

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer 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 datasets:

- Sync Direction can't be *Don't sync*

## Create Task Filters for Salesforce for Outlook (Retiring)

Specify which tasks sync between Microsoft® Outlook® and Salesforce for your sales teams.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

Datasets consist of filters that limit what records sync. For example, most users 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.

**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)

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.

The screenshot shows the 'Task Filters' configuration interface. At the top, it says 'Filter the tasks users of this configuration can sync.' Below that, there's a 'Sync: User's Records' section. The main filter is 'Filter By Due Date' with a 'Learn more' link, set to 'Greater or equal to' and 'LAST 30 DAYS'. Under 'Additional Settings for Tasks', there's a yellow warning banner with a triangle icon and the text 'Learn more about enabling this feature.' Below the banner is a checkbox labeled 'Sync recurring Salesforce tasks to Outlook' which is checked and circled in red.

4. You can use the **Get Record Count** button to check how many records sync for a sample Salesforce for Outlook user based on the configuration's filters.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer 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 datasets:

- Sync Direction can't be *Don't sync*

5. Save the dataset.

## SEE ALSO:

- [Salesforce for Outlook \(Retiring\) Configurations and Email Application Publisher Layouts](#)
- [How Tasks Sync with Salesforce for Outlook \(Retiring\)](#)
- [Sample Lightning Sync and Salesforce for Outlook \(Retiring\) Datasets](#)

## Sample Lightning Sync and Salesforce for Outlook (Retiring) Datasets

Because users with the same role usually have similar data sync requirements, many administrators create sync configurations based on the positions in their organization. The following sample datasets are 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).

**!** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

### Sales Manager

Sales managers usually need to see the 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 are related to these deals. They also like to have their Chatter contacts in Outlook.

Sample Outlook Configuration for Sales Managers:

```
Contacts
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 also want their Chatter contacts, a record of the past month's meetings, and a schedule of all future meetings.

#### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

Sample Outlook Configuration for Sales Engineers:

```
Contacts
  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 of over 40% sync. They 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
  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 Datasets for Salesforce for Outlook \(Retiring\)](#)

## Check the Size of Salesforce for Outlook (Retiring) Datasets

You can use the Get Record Count button to check how many records 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.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

1. Define a dataset for a configuration.
2. Under Dataset Size, click the lookup icon next to the `user` field.
3. Select a user. To test maximum size, choose a user who owns many records, even one who isn't currently assigned to the configuration.
4. Click **Get Record Count**. The number of records that sync between Outlook and Salesforce for that user appear.
5. Adjust the filters or selected user and retest the dataset as needed. Nothing is saved until you click **Save**.

SEE ALSO:

[Define Datasets for Salesforce for Outlook \(Retiring\)](#)

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

### USER PERMISSIONS

To view Outlook datasets:

- View Setup and Configuration

To test Outlook datasets:

- Manage Email Client Configurations

## Track the Versions of Salesforce for Outlook (Retiring) Your Users Run

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

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

1. From Setup, enter *Login History* in the Quick Find box, then select **Login History**.

### EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in:  
**Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

### USER PERMISSIONS

- To run reports:
- Run Reports

The screenshot shows the Salesforce Login History report. The left sidebar has 'Login History' selected under 'Administer'. The main area shows a table of login records. A red box labeled '1' highlights the 'Login History' menu item. Another red box labeled '2' highlights the 'API Version' column in the table. A yellow banner at the top says 'Still Using IE6?'. Below the table, there are download options for CSV and GZIP files.

Username	Login Time	Source IP	Login Type	Status	Browser	Platform	Application	Client Version	API Type	API Version	Login URL
bdonovan@cnvoc.demo	10/7/2013 2:16:05 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	Unknown	Unknown	Salesforce for Outlook	241	N/A	N/A	na9.salesforce.com
chrsitlawill@cnvoc.demo	10/7/2013 2:14:16 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	Unknown	Unknown	Salesforce for Outlook	241	N/A	N/A	na9.salesforce.com
madisonrfgs@cnvoc.demo	10/7/2013 2:16:57 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	Unknown	Unknown	Salesforce for Outlook	241	N/A	N/A	na9.salesforce.com
stuartmiddle@cnvoc.demo	10/7/2013 3:00:51 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	Unknown	Unknown	Salesforce for Outlook	241	N/A	N/A	na9.salesforce.com
adamsmith@cnvoc.demo	10/7/2013 3:00:28 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	Unknown	Unknown	Salesforce for Outlook	234	N/A	N/A	na9.salesforce.com
timmeadow@cnvoc.demo	10/7/2013 5:03:58 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	Unknown	Unknown	Salesforce for Outlook	234	N/A	N/A	na9.salesforce.com
andygib@cnvoc.demo	10/8/2013 1:23:03 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	Unknown	Unknown	Salesforce for Outlook	231	N/A	N/A	na9.salesforce.com
jimtemp@cnvoc.demo	10/7/2013 2:13:51 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	IE 8 (Compatibility View)	Windows 7	Salesforce for Outlook	231	N/A	N/A	login.salesforce.com
kwakamatsu@cnvoc.demo	10/8/2013 2:18:26 PM PDT	Salesforce.com IP	Remote Access 2.0	Success	IE 9 (Compatibility View)	Windows 7	Salesforce for Outlook	226	N/A	N/A	na9.salesforce.com

2. See each user's version of Salesforce for Outlook in the Application and Client Version columns.

SEE ALSO:

[Salesforce for Outlook \(Retiring\)](#)

## Set Up Salesforce for Outlook on Your Desktop (Retiring)

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.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

[Download the Salesforce for Outlook \(Retiring\) Installer](#)

Download the installer from Salesforce.

[Install and Set Up Salesforce for Outlook \(Retiring\)](#)

Follow these steps to install Salesforce for Outlook in your org.

[Manage Your Salesforce for Outlook \(Retiring\) Configuration](#)

Depending on whether your administrator lets you change your settings, customize Salesforce for Outlook to fit your specific needs.

[Uninstall Salesforce for Outlook \(Retiring\)](#)

How to remove Salesforce for Outlook.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

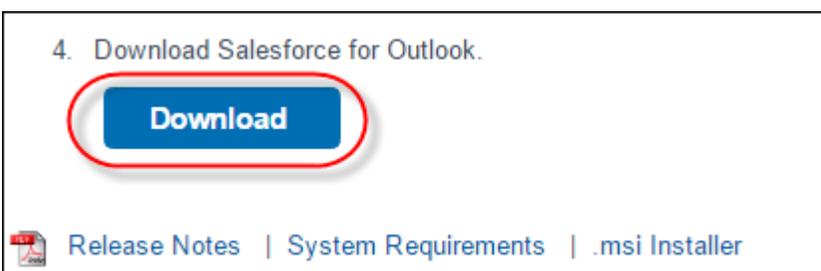
Available with the purchase of Sales Cloud or Government Cloud in:  
**Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## Download the Salesforce for Outlook (Retiring) Installer

Download the installer from Salesforce.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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 (📧) 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.



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 \(Retiring\)](#)  
[Salesforce for Outlook \(Retiring\) System Requirements](#)  
[Install and Set Up Salesforce for Outlook \(Retiring\)](#)  
[Salesforce Help: Update Your Personal Settings](#)

### EDITIONS

Available in: Salesforce Classic (**not available in all orgs**)

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

### USER PERMISSIONS

To sync using Salesforce for Outlook:

- Valid dataset for each object being synced

To change sync folders:

- Your Outlook profile set as the default in your Outlook Mail Settings AND

Let users modify the Outlook folder for syncing contacts in your Outlook configuration

## Install and Set Up Salesforce for Outlook (Retiring)

Follow these steps to install Salesforce for Outlook in your org.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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 (🌩) appears in your system tray. If the wizard doesn't open, you can start it manually. Right-click 🌩 and click **Settings**.

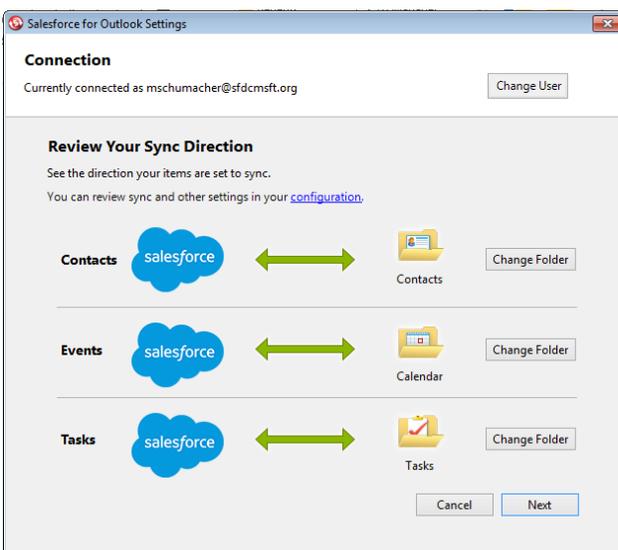
3. If you want to log in to a site other than the default, click **Change URL** and pick the server to which you want to connect. If the server you want isn't listed, select *Other...* and enter the URL, such as a custom domain used by your organization.

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.

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.



### EDITIONS

Available in: Salesforce Classic (**not available in all orgs**)

Available in: Lightning Experience, if **Salesforce Classic is available in your org**.

Available with the purchase of Sales Cloud or Government Cloud in:

**Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

### USER PERMISSIONS

To sync using Salesforce for Outlook:

- Valid dataset for each object being synced

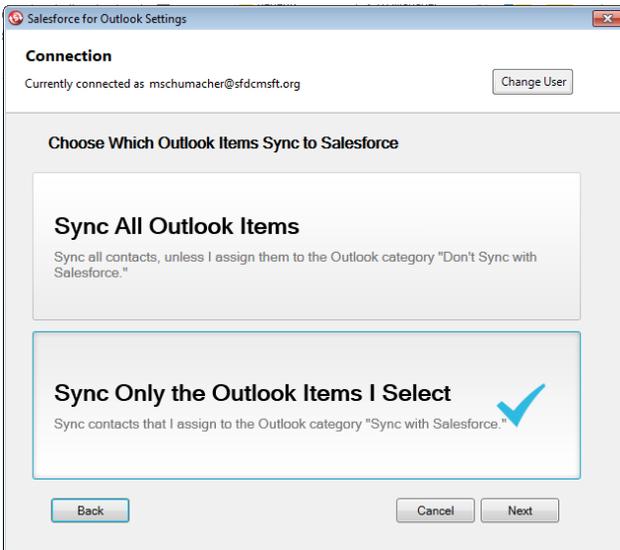
To change sync folders:

- Your Outlook profile set as the default in your Outlook Mail Settings AND

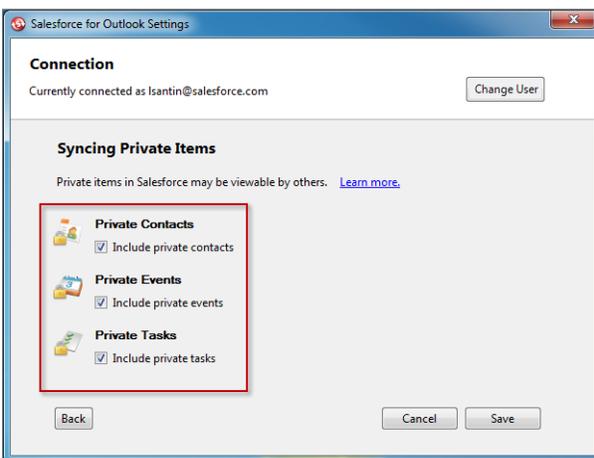
Let users modify the Outlook folder for syncing contacts in your Outlook configuration

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 , 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 \(Retiring\)](#)
- [Salesforce for Outlook \(Retiring\) System Requirements](#)
- [Download the Salesforce for Outlook \(Retiring\) Installer](#)
- [Uninstall Salesforce for Outlook \(Retiring\)](#)

## Manage Your Salesforce for Outlook (Retiring) Configuration

Depending on whether your administrator lets you change your settings, customize Salesforce for Outlook to fit your specific needs.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

1. 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 anytime by clicking **Revert to default** at the top of your modified configuration. Your administrator can change your settings as needed.

### [Edit Your Salesforce for Outlook \(Retiring\) 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 \(Retiring\) 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 \(Retiring\) 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 for Salesforce for Outlook \(Retiring\)](#)

Specify what happens when Salesforce for Outlook encounters a conflict as it syncs records between Microsoft® Outlook® and Salesforce.

#### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

#### USER PERMISSIONS

To access your Salesforce for Outlook configuration

- Assigned to an active configuration

### [View Your Salesforce for Outlook \(Retiring\) 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 (Retiring) Email Settings

See whether your administrator lets you add emails to Salesforce from Microsoft® Outlook®, and change your email settings based on your needs.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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.

 **Note:** If you don't see the **Add Email** and **Send and Add** options, ask your administrator to activate Email to Salesforce.

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.

6. If you selected leads or contacts:

**a.** Specify how Email to Salesforce processes emails that contain lead or contact information that matches duplicate records.

**b.** 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.

8. To receive a confirmation email when an email is sent to Salesforce, select **Email me confirmation of association**.

### EDITIONS

Available in: Salesforce Classic (**not available in all orgs**)

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To access your Salesforce for Outlook configuration:

- Assigned to an active configuration

To edit email settings:

- Add Email

9. Click **Save**.

## SEE ALSO:

- [Manage Your Salesforce for Outlook \(Retiring\) Configuration](#)
- [Add Microsoft® Outlook® Emails to Salesforce Records](#)
- [Salesforce for Outlook \(Retiring\)](#)

## Edit Your Salesforce for Outlook (Retiring) Sync Settings

Depending on whether your administrator gave you permissions, customize which items sync between Microsoft Outlook and Salesforce, and the directions they sync.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

1. 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 (🔍).
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 anytime 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 \(Retiring\) Configuration](#)
- [Syncing Between Salesforce for Outlook \(Retiring\) and Microsoft® Outlook®](#)

## EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in:  
**Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

## USER PERMISSIONS

To access your Salesforce for Outlook configuration

- Assigned to an active configuration

To disable sync:

- Whether object is synced

## Customize Your Salesforce for Outlook (Retiring) Sync Direction

Depending on whether your administrator gave you permission, customize sync directions between Microsoft® Outlook® and Salesforce based on your preferences.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

1. 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*.
    - *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 anytime by clicking **Revert to default** at the top of your modified configuration. Your administrator can change your settings as needed.
-  **Note:** Contact sync doesn't support Outlook categories, so contacts labeled with a Salesforce\_Sync category that don't exist in a contacts subfolder of the same name don't sync with Salesforce. To avoid this issue, disable contact categories and select the Salesforce\_Sync folder for new contacts in Outlook. See [EAC - New Contacts Created In Outlook with 'Salesforce\\_Sync' Category Do Not Sync to Salesforce](#).

### SEE ALSO:

[Manage Your Salesforce for Outlook \(Retiring\) Configuration](#)

#### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

#### USER PERMISSIONS

To access your Salesforce for Outlook configuration

- Assigned to an active configuration

To change sync direction

- Sync direction

## Edit Conflict Settings for Salesforce for Outlook (Retiring)

Specify what happens when Salesforce for Outlook encounters a conflict as it syncs records between Microsoft® Outlook® and Salesforce.

-  **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).
1. 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 anytime by clicking **Revert to default** at the top of your modified configuration. Your administrator can change your settings as needed.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

### USER PERMISSIONS

To access your Salesforce for Outlook configuration

- Assigned to an active configuration

To change conflict behavior

- Conflict behavior

## View Your Salesforce for Outlook (Retiring) Matching Criteria

See the matching criteria your administrator assigned to you.

**!** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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 \(Retiring\) Configuration](#)

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer 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.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

Field mappings define which Salesforce and Outlook fields correspond when items sync between the two systems.

1. 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 what Salesforce fields are mapping to each Outlook field.
4. Edit the Salesforce or Outlook field mappings you want 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.

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 anytime 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 \(Retiring\) Configuration](#)

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in:  
**Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer 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

## Uninstall Salesforce for Outlook (Retiring)

How to remove Salesforce for Outlook.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

1. Close Outlook.
2. Right-click the sync icon  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

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

## Manage How Microsoft® Outlook® Items Sync with Salesforce for Outlook (Retiring)

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 want to sync, or syncing all your items, and selecting the items you want to prevent from syncing.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

View your sync settings from the Windows® system tray, and then manage how you sync your Outlook items with Salesforce.

1. Right-click the Salesforce for Outlook icon () in the system tray.



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 731.
  - If you're set up to sync with the Sync All Outlook Items option, Salesforce for Outlook syncs all your Outlook items. [Assign the category Don't Sync with Salesforce to the items you want to prevent from syncing](#) on page 732.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

#### 4. Click **Cancel**.

##### [Choose Which Microsoft® Outlook® Items Sync with Salesforce for Outlook \(Retiring\)](#)

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 for Outlook \(Retiring\)](#)

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 \(Retiring\)](#)

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.

## Choose Which Microsoft® Outlook® Items Sync with Salesforce for Outlook (Retiring)

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.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in:  
**Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## Prevent Which Microsoft® Outlook® Items Sync with Salesforce for Outlook (Retiring)

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

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

1. In Outlook, select the contacts, events, and tasks you want to prevent from syncing.
2. On the Outlook ribbon, click **Categorize**.
3. Select the category `Don't Sync with Salesforce`.  
The items you categorized will stop syncing after the next sync cycle.

## Delete Items Syncing with Salesforce for Outlook (Retiring)

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.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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.

**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.

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

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### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

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### USER PERMISSIONS

To delete items syncing between Salesforce and Outlook

- Delete on all objects that users want to delete

over the delete. This behavior happens as a result of `Conflict Behavior` 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 (Retiring)

Access Salesforce for Outlook settings and tools through the system tray application.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

After you install Salesforce for Outlook, an icon  appears in your Microsoft® Windows system tray.



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 730
- [Change your login information](#)
- [Hide alerts](#)
- [View errors](#)
- [Change your sync folders](#)
- [Access the Salesforce for Outlook online help](#)

Access the System Tray Application

- If you don't see the icon, 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 need to start Outlook.
- If you don't see the icon, click the arrow next to the system tray and drag the Salesforce for Outlook icon to the system tray.

### EDITIONS

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### [View the Salesforce for Outlook \(Retiring\) 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.

### [Change Your Salesforce for Outlook \(Retiring\) Login Information](#)

If your Salesforce username or password changes, you need to update your login information in Salesforce for Outlook.

### [Change Your Salesforce for Outlook \(Retiring\) 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 \(Retiring\) Alerts](#)

If you don't want to see system tray alerts for sync and other errors, you can hide them.

### [View Salesforce for Outlook \(Retiring\) Errors](#)

Whenever Salesforce for Outlook has problems syncing your data, the system tray icon changes to an error icon, and the status text at the top of the system tray shortcut menu displays the number of errors.

### [Remove Customer Data from Your Salesforce for Outlook \(Retiring\) 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.

## View the Salesforce for Outlook (Retiring) 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.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

To view this log, right-click the system tray icon  and click **Sync > View Sync Log**.

### SEE ALSO:

[Access Salesforce for Outlook Settings and Tools \(Retiring\)](#)

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in:  
**Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

## Change Your Salesforce for Outlook (Retiring) Login Information

If your Salesforce username or password changes, you need to update your login information in Salesforce for Outlook.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

1. Right-click the system tray icon  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 \(Retiring\)](#)

### EDITIONS

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Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

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### USER PERMISSIONS

To log in to Salesforce for Outlook

- Assigned to an active configuration

## Change Your Salesforce for Outlook (Retiring) 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.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

1. Right-click the system tray icon  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 \(Retiring\)](#)

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer 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 (Retiring) Alerts

If you don't want to see system tray alerts for sync and other errors, you can hide them.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

Right-click the system tray icon  and click **Hide Alerts**.

SEE ALSO:

[Access Salesforce for Outlook Settings and Tools \(Retiring\)](#)

## View Salesforce for Outlook (Retiring) Errors

Whenever Salesforce for Outlook has problems syncing your data, the system tray icon changes to an error icon, and the status text at the top of the system tray shortcut menu displays the number of errors.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

 **Note:** This image represents the error icon: .

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.

SEE ALSO:

[Access Salesforce for Outlook Settings and Tools \(Retiring\)](#)

## Remove Customer Data from Your Salesforce for Outlook (Retiring) 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.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

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**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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  and select **Exit**.
3. From `C:\Users\username\AppData\Roaming\salesforce.com\Salesforce for Outlook\logs`, delete the files `Trace.log` and `Sync.log`.

## Salesforce for Outlook (Retiring) FAQ

Find answers to frequently asked questions about Salesforce for Outlook.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

Category	Questions
<b>General Salesforce for Outlook Questions</b>	<a href="#">What's the difference between private items in both Salesforce for Outlook (Retiring) and Microsoft® Outlook®?</a>
<b>Installing Salesforce for Outlook</b>	<a href="#">Does Salesforce for Outlook (Retiring) support terminal servers?</a> <a href="#">Why is my Salesforce for Outlook (Retiring) installation failing on the prerequisites screen?</a>
<b>Configuring Salesforce for Outlook</b>	<a href="#">Can I map custom fields I'm syncing with Salesforce for Outlook (Retiring)?</a> <a href="#">Can I mass configure Salesforce for Outlook (Retiring)?</a> <a href="#">Can I use filter logic in Salesforce for Outlook (Retiring) datasets?</a>
<b>Syncing with Salesforce for Outlook</b>	<a href="#">Should I sync Outlook or use import wizards to upload my data into Salesforce?</a> <a href="#">Can I sync person accounts by using Salesforce for Outlook (Retiring)?</a> <a href="#">Can I add cases using Salesforce for Outlook (Retiring)?</a> <a href="#">Can I associate Outlook records to custom objects using Salesforce for Outlook (Retiring)?</a>

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: Lightning Experience, if [Salesforce Classic is available in your org](#).

Available with the purchase of Sales Cloud or Government Cloud in: **Personal, Contact Manager, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

Category	Questions
<b>Managing Synced Records</b>	<p><a href="#">Why does Salesforce for Outlook (Retiring) create duplicate records in Microsoft® Outlook®?</a></p> <p><a href="#">Why does Salesforce for Outlook (Retiring) create duplicate contacts in Salesforce and Microsoft® Outlook®?</a></p> <p><a href="#">Why does Salesforce for Outlook (Retiring) delete my Outlook records after I sync?</a></p>
<b>Adding Emails to Salesforce Records</b>	<p><a href="#">Which email integration product is right for my company?</a></p> <p><a href="#">Can I add emails to Salesforce records?</a></p> <p><a href="#">Why isn't Salesforce for Outlook (Retiring) adding emails to the right contact or lead in Salesforce?</a></p> <p><a href="#">Why can't I add emails to Salesforce for Outlook (Retiring)?</a></p> <p><a href="#">When I add emails to Salesforce for Outlook (Retiring), how can I include email attachments?</a></p>
<b>Syncing Contacts</b>	<p><a href="#">How do I enable contacts for sync in Salesforce for Outlook (Retiring)?</a></p>
<b>Protecting Your Data</b>	<p><a href="#">How does Salesforce for Outlook (Retiring) protect emails?</a></p> <p><a href="#">Does Salesforce support single sign-on (SSO) for Salesforce for Outlook (Retiring)?</a></p> <p><a href="#">How secure is Salesforce for Outlook (Retiring)?</a></p>

[What's the difference between private items in both Salesforce for Outlook \(Retiring\) 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.

[Does Salesforce for Outlook \(Retiring\) support terminal servers?](#)

No. Salesforce for Outlook does not support terminal servers, such as Citrix.

[Why is my Salesforce for Outlook \(Retiring\) installation failing on the prerequisites screen?](#)

It's possible that your system doesn't meet all system requirements for Salesforce for Outlook. Verify your system meets these requirements, then try installing Salesforce for Outlook again.

[Can I map custom fields I'm syncing with Salesforce for Outlook \(Retiring\)?](#)

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.

[Can I mass configure Salesforce for Outlook \(Retiring\)?](#)

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.>

[Can I use filter logic in Salesforce for Outlook \(Retiring\) datasets?](#)

Admins can use filter logic to limit which records your users sync using Salesforce for Outlook, but users can't.

[Can I sync person accounts by using Salesforce for Outlook \(Retiring\)?](#)

No. You can't upload person accounts by using Salesforce for Outlook.

[Can I add cases using Salesforce for Outlook \(Retiring\)?](#)

Yes, Salesforce for Outlook supports adding emails to Salesforce as cases.

### Can I associate Outlook records to custom objects using Salesforce for Outlook (Retiring)?

You can assign synced events and tasks to several different objects, including custom objects, but you can assign synced contacts only to accounts.

### Why does Salesforce for Outlook (Retiring) create duplicate records in Microsoft® Outlook®?

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 can create duplicate records in Outlook.

### Why does Salesforce for Outlook (Retiring) create duplicate contacts in Salesforce and Microsoft® Outlook®?

If you sync your team's records and they include different information for some of the same contacts you own, Salesforce for Outlook can create duplicate contacts in both Salesforce and Outlook.

### Why does Salesforce for Outlook (Retiring) 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.

### Why isn't Salesforce for Outlook (Retiring) adding emails to the right contact or lead in Salesforce?

There are different reasons why Salesforce for Outlook isn't adding emails to the right contact or lead in Salesforce.

### Why can't I add emails to Salesforce for Outlook (Retiring)?

Your email address isn't authorized in Salesforce for Outlook.

### When I add emails to Salesforce for Outlook (Retiring), how can I include email attachments?

Yes. If you meet the requirements, you can include email attachments when you add emails to Salesforce.

### How do I enable contacts for sync in Salesforce for Outlook (Retiring)?

Your administrator needs to perform two tasks before you can sync contacts between Microsoft® Outlook® and Salesforce.

### How does Salesforce for Outlook (Retiring) protect emails?

Salesforce supports both delegated authentication and Security Assertion Markup Language (SAML) requirements for Salesforce for Outlook.

### Does Salesforce support single sign-on (SSO) for Salesforce for Outlook (Retiring)?

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.

### How secure is Salesforce for Outlook (Retiring)?

Salesforce for Outlook, a .NET application you install on your machine, securely connects to Salesforce.

## What's the difference between private items in both Salesforce for Outlook (Retiring) 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.

**!** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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

Item	Private in Outlook	Marked private in Salesforce
		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 \(Retiring\)](#)

[Syncing Between Salesforce for Outlook \(Retiring\) and Microsoft® Outlook®](#)

## Does Salesforce for Outlook (Retiring) support terminal servers?

No. Salesforce for Outlook does not support terminal servers, such as Citrix.

**!** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

## SEE ALSO:

[Salesforce for Outlook \(Retiring\)](#)

## Why is my Salesforce for Outlook (Retiring) installation failing on the prerequisites screen?

It's possible that your system doesn't meet all system requirements for Salesforce for Outlook. Verify your system meets these requirements, then try installing Salesforce for Outlook again.

**!** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

## SEE ALSO:

[Salesforce for Outlook \(Retiring\)](#)

[Install and Set Up Salesforce for Outlook \(Retiring\)](#)

[Salesforce for Outlook \(Retiring\) System Requirements](#)

## Can I map custom fields I'm syncing with Salesforce for Outlook (Retiring)?

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.

**!** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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 (Retiring)?

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.>

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

SEE ALSO:

[Manage Your Salesforce for Outlook \(Retiring\) Configuration](#)

## Can I use filter logic in Salesforce for Outlook (Retiring) datasets?

Admins can use filter logic to limit which records your users sync using Salesforce for Outlook, but users can't.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

SEE ALSO:

[Syncing Between Salesforce for Outlook \(Retiring\) and Microsoft® Outlook®](#)

## Can I sync person accounts by using Salesforce for Outlook (Retiring)?

No. You can't upload person accounts by using Salesforce for Outlook.

 **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

For information on how to import person accounts into your Salesforce organization, see [Data Import Wizard](#).

SEE ALSO:

[Syncing Between Salesforce for Outlook \(Retiring\) and Microsoft® Outlook®](#)

## Can I add cases using Salesforce for Outlook (Retiring)?

Yes, Salesforce for Outlook supports adding emails to Salesforce as cases.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

SEE ALSO:

[Create Cases from the Outlook Ribbon with Salesforce for Outlook \(Retiring\)](#)

[Set Up Create Case for Salesforce for Outlook \(Retiring\) Users](#)

## Can I associate Outlook records to custom objects using Salesforce for Outlook (Retiring)?

You can assign synced events and tasks to several different objects, including custom objects, but you can assign synced contacts only to accounts.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

SEE ALSO:

[Syncing Between Salesforce for Outlook \(Retiring\) and Microsoft® Outlook®](#)

## Why does Salesforce for Outlook (Retiring) create duplicate records in Microsoft® Outlook®?

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 can create duplicate records in Outlook.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

Duplicate records can be created 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*. Removing the duplicates in Outlook ensures that you don't delete information in Salesforce to which other users have contributed.

SEE ALSO:

[Syncing Between Salesforce for Outlook \(Retiring\) and Microsoft® Outlook®](#)

## Why does Salesforce for Outlook (Retiring) create duplicate contacts in Salesforce and Microsoft® Outlook®?

If you sync your team's records and they include different information for some of the same contacts you own, Salesforce for Outlook can create duplicate contacts in both Salesforce and Outlook.

**!** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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 issue, coordinate with your team members so you share the same contact information. You need to remove the contacts containing the outdated information.

SEE ALSO:

[Syncing Between Salesforce for Outlook \(Retiring\) and Microsoft® Outlook®](#)

## Why does Salesforce for Outlook (Retiring) 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.

**!** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

These records 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 these categories, the sync process attempts 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 Salesforce for Outlook \(Retiring\) and Microsoft® Outlook®](#)

## Why isn't Salesforce for Outlook (Retiring) adding emails to the right contact or lead in Salesforce?

There are different reasons why Salesforce for Outlook isn't adding emails to the right contact or lead in Salesforce.

**!** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

One of the errors is occurring.

If you see	Salesforce for Outlook can be adding your emails to	To resolve this issue
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 can be adding your emails to To resolve this issue**


---

Remove your company's domain from `Excluded Domains` in your `My Email to Salesforce` settings

---

## SEE ALSO:

[Edit Your Salesforce for Outlook \(Retiring\) Email Settings](#)

**Why can't I add emails to Salesforce for Outlook (Retiring)?**

Your email address isn't authorized in Salesforce for Outlook.

**!** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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 \(Retiring\) Email Settings](#)

**When I add emails to Salesforce for Outlook (Retiring), how can I include email attachments?**

Yes. If you meet the requirements, you can include email attachments when you add emails to Salesforce.

**!** **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

- 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 Outlook integration, 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
Outlook integration	<p>Outlook integration in supported versions of Microsoft® Outlook, by selecting <b>Manage add-ins</b>. If the integration isn't available, add it from the Microsoft® AppSource Store or ask your email admin to add it for you.</p> <p>In Salesforce, set your preferences in <b>My Email to Salesforce</b> in your Email settings, with <b>Always save email attachments</b> selected</p>	Outlook Integration and Email to Salesforce in Salesforce Setup	After you select to log the email to Salesforce from Outlook, select the option to include attachments.
Salesforce for Outlook with side panel		<p><b>Side Panel</b> and <b>Add Email</b> in your Outlook configuration</p> <p><b>Side Panel</b>, <b>Add Email</b>, and <b>Allow users to select attachments</b> in your Outlook configuration</p>	<p>Automatically, after you add an email to Salesforce from the side panel.</p> <p>When you select  after you add an email to Salesforce from the side panel.</p>
Salesforce for Outlook without side panel	<p><b>Email to Salesforce</b> in your Email settings, with <b>Always save email attachments</b> selected</p>	<p><b>Email to Salesforce</b> in Salesforce Setup and an active Outlook configuration that includes you</p>	Automatically, after you add an email to Salesforce using the <b>Add Emails</b> or <b>Send and Add</b> buttons in Outlook.
Email to Salesforce	<p><b>Email to Salesforce</b> in your Email settings, with <b>Always save email attachments</b> selected</p>	<p><b>Email to Salesforce</b> in Salesforce Setup</p>	Automatically, after you send the email to your Email to Salesforce address.
Gmail Integration	<p>Gmail integration in your G Suite Gmail account. If the integration isn't available, add the Chrome™ extension from the Chrome Web Store.</p>	<p>Gmail Integration in Salesforce Setup</p>	After you log the email from Gmail, select the option to include attachments.

If you're using	You enable	Your administrator enables	Add attachments to Salesforce like this
Salesforce Inbox	The Salesforce Inbox application on iOS™ and Android™ devices. If the application is not available, get it from the App Store or Google Play Store.	Salesforce Inbox in Salesforce Setup	When you log an email to Salesforce, any attachments in the email are logged.

## SEE ALSO:

- [Email Allocations per Edition](#)
- [Add Microsoft® Outlook® Emails to Salesforce Records](#)
- [Set Up Email Options for Salesforce for Outlook \(Retiring\)](#)
- [Set Up Email to Salesforce](#)
- [Enable Email to Salesforce for Your Users](#)

## How do I enable contacts for sync in Salesforce for Outlook (Retiring)?

Your administrator needs to perform two tasks before you can sync contacts between Microsoft® Outlook® and Salesforce.

-  **Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

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 dataset for that configuration.

After your administrator performs those tasks, you 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 \(Retiring\) Sync Settings](#)
- [How Your Contacts Sync with Salesforce for Outlook \(Retiring\)](#)
- [Learn about Datasets for Salesforce for Outlook \(Retiring\)](#)

## How does Salesforce for Outlook (Retiring) protect emails?

Salesforce supports both delegated authentication and Security Assertion Markup Language (SAML) requirements for Salesforce for Outlook.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

SEE ALSO:

[Edit Your Salesforce for Outlook \(Retiring\) Email Settings](#)

## Does Salesforce support single sign-on (SSO) for Salesforce for Outlook (Retiring)?

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.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

## How secure is Salesforce for Outlook (Retiring)?

Salesforce for Outlook, a .NET application you install on your machine, securely connects to Salesforce.

**Important:** Full product retirement for Salesforce for Outlook is scheduled for December 2027. See [Salesforce for Outlook Retirement](#). To keep integrating Microsoft Outlook with Salesforce, check out our next-generation products: the Outlook integration and Einstein Activity Capture. See [Move from Salesforce for Outlook \(Retiring\) to the Next-Generation Products](#).

Specifically,

For	Salesforce for Outlook uses
Username 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.

## Extended Mail Merge

With Extended Mail Merge, you can merge data from your Salesforce accounts, contacts, leads, cases, opportunities, and custom objects into Microsoft Word documents. The documents can be made into form letters, envelopes, labels, or any Word document that you want to personalize for recipients. You can generate documents one at a time, or generate documents in bulk using mass mail merge.

[Set Up Extended Mail Merge](#)

To set up Extended Mail Merge for your sales reps, you must turn on the feature in Salesforce. Then you must create a mail merge template in Microsoft Word (or download our sample templates). Last, you must upload your template to Salesforce so that your reps can access it.

[Guidelines for Creating Extended Mail Merge Templates](#)

Follow these guidelines when creating your mail merge templates for Extended Mail Merge.

### EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: All editions

### [Considerations for Creating Extended 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.

### [Generate Mail Merge Documents Using Extended Mail Merge](#)

Use Extended Mail Merge to generate a mail merge document that includes field data from your accounts, contacts, leads, cases, opportunities, and custom objects. Or you can generate multiple documents at the same time.

### [Considerations for Using Extended Mail Merge](#)

Consider these items when using Extended Mail Merge to generate Microsoft Word mail merge documents.

#### SEE ALSO:

[Generate Mass Mail Merge Documents](#)

[Generate a Single Mail Merge Document](#)

## Set Up Extended Mail Merge

To set up Extended Mail Merge for your sales reps, you must turn on the feature in Salesforce. Then you must create a mail merge template in Microsoft Word (or download our sample templates). Last, you must upload your template to Salesforce so that your reps can access it.

### [Turn On Extended Mail Merge](#)

The first step to setting up Extended Mail Merge is to turn on the feature. You can also decide how sales reps access their mail merged Microsoft Word documents.

### [Create or Download Mail Merge Templates](#)

Mail merge templates define the content of a form letter, envelope, label, or other mail merge document. Before sales reps can generate mail merged documents using Extended Mail Merge, someone on your sales team must create a mail merge template in Microsoft Word. Or you can use our downloadable sample templates.

### [Upload Mail Merge Templates to Salesforce](#)

Before sales reps can send mail merge documents from their Salesforce records using Extended Mail Merge, Salesforce admins must upload a Microsoft Word mail merge template to Salesforce.

#### EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: All editions

## Turn On Extended Mail Merge

The first step to setting up Extended Mail Merge is to turn on the feature. You can also decide how sales reps access their mail merged Microsoft Word documents.

1. From Setup, in the Quick Find box, enter *User Interface*, and then select **User Interface**.
2. Select **Enable Extended Mail Merge**.
3. Indicate whether you want mail merged documents to be saved to the My Personal Documents folder of the user who generated the mail merge. If you don't select this option, only documents over 3 MB are saved to the user's documents. Smaller documents are emailed to the user.

After you turn on Extended Mail Merge, you must decide what you want your template to look like. You can either create your own mail merge templates in Microsoft Word or use one of our downloadable templates. Then you must upload your template to Salesforce.

## Create or Download Mail Merge Templates

Mail merge templates define the content of a form letter, envelope, label, or other mail merge document. Before sales reps can generate mail merged documents using Extended Mail Merge, someone on your sales team must create a mail merge template in Microsoft Word. Or you can use our downloadable sample templates.

### [Create Mail Merge Templates in Microsoft Word](#)

Admins or sales teams can create a custom mail merge template in Microsoft Word for Extended Mail Merge.

### [Download Sample Mail Merge Templates for Extended Mail Merge](#)

Download our sample Microsoft Word mail merge templates so that sales reps can use them for Extended Mail Merge. If you want, you can customize the templates in Word before you upload them.

#### SEE ALSO:

[Extended Mail Merge](#)

[Considerations for Creating Extended Mail Merge Templates](#)

[Generate a Single Mail Merge Document](#)

## Create Mail Merge Templates in Microsoft Word

Admins or sales teams can create a custom mail merge template in Microsoft Word for Extended Mail Merge.

To build a template for extended mail merge, draft the desired text for your document in Microsoft Word. Wherever you want to insert field data from your Salesforce records—for example a contact's name and address—you insert Word merge fields that reference Salesforce data. Here's how you do it.

### EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: All editions

### USER PERMISSIONS

To turn on Extended Mail Merge

- Customize Application
- AND
- Modify All Data

### EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: All editions

### EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: All editions

 **Tip:** For help with creating your template, see [Guidelines for Creating Mail Merge Templates](#) on page 752.

After you finalize your mail merge template, a Salesforce administrator must upload the template to Salesforce so that sales reps can access it.

1. Create lists of the standard and custom fields available in your Salesforce organization for reference in your merge templates. See [Locate Record Field Names for Mail Merge](#).
2. Open a new blank document in Microsoft Word 2007.
3. Use Word to compose the document so it contains the text, data, and formatting your users require.
4. Locate the text or data variables in your Word document that you want to change each time the template is used. For example, in the salutation “Dear Bob,” “Bob” is a variable because you want it to change when the letter is sent to a different person.
5. 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 dropdown.
- 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`. Refer to the list of the standard and custom fields available in your Salesforce organization that you identified in step 1.
- 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.

6. Save your Word document.

SEE ALSO:

[Create or Download Mail Merge Templates](#)  
[Extended Mail Merge](#)

## Download Sample Mail Merge Templates for Extended Mail Merge

Download our sample Microsoft Word mail merge templates so that sales reps can use them for Extended Mail Merge. If you want, you can customize the templates in Word before you upload them.

1. Download the [sample mail merge templates](#) and unzip the files to a convenient directory on your hard drive.
2. Review the instructions provided in `salesforce_mailmerge_templates_howto.doc`.
3. Open the desired sample template in Microsoft Word.

### EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: All editions

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 displays in curly braces as follows: {MERGEFIELD Contact\_FullName \\* MERGEFORMAT }

7. Change or add merge fields as necessary. For help, see [Create Mail Merge Templates from Microsoft Word](#).
8. Save your Word document.

After you finalize your mail merge template, a Salesforce administrator must upload the template to Salesforce so that sales reps can access it.

#### SEE ALSO:

- [Create or Download Mail Merge Templates](#)
- [Considerations for Using Merge Fields in Email Templates and Letterheads](#)
- [Extended Mail Merge](#)

## Upload Mail Merge Templates to Salesforce

Before sales reps can send mail merge documents from their Salesforce records using Extended Mail Merge, Salesforce admins must upload a Microsoft Word mail merge template to Salesforce.

 **Tip:** Before uploading a template, we recommend reviewing [Considerations for Creating Extended Mail Merge Templates](#) on page 753.

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. Doing so helps users correctly choose a template when generating mail merged documents.
4. Choose the appropriate document type: *Document*, *Label*, or *Envelope*.
5. Click **Browse** or **Choose File** to upload your Word mail merge template from your computer to Salesforce.
6. Click **Save**.

#### SEE ALSO:

- [Create or Download Mail Merge Templates](#)
- [Generate Emails From Records](#)
- [Extended Mail Merge](#)

## Guidelines for Creating Extended Mail Merge Templates

Follow these guidelines when creating your mail merge templates for Extended Mail Merge.

### EDITIONS

Uploading mail merge templates is available in: both Salesforce Classic (not available in all orgs) and Lightning Experience (not available in all orgs)

Generating mail merges is available in: Salesforce Classic

Available in: All editions

### USER PERMISSIONS

To upload and edit mail merge templates:

- View Setup and Configuration

AND

Manage Classic Email Public Templates

## Microsoft Word File Guidelines

- Don't configure mail merge templates as "protected" or "restricted access" in Microsoft Word. Refer to Word's help for information about protected Word documents.
- Don't connect mail merge templates to external data sources such as Excel worksheets or Access databases. Refer to Word's help for information about restoring mail merge documents to what Word calls "normal Word documents."
- Don't save templates in .dotx file formats.

## Syntax and Formatting

Mail merge templates are created by uploading documents to Salesforce from your desktop. The syntax for these merge fields is `OBJECT_FIELD_NAME` or `FIELD_NAME`. Merge fields for mail merge templates must:

- Be unique
- Contain only letters, numbers, and the underscore ( `_` ) character
- Not exceed 40 characters

For example: `AccountNumber`.

## Guidelines for Using Opportunity Product Data

You can download [sample mail merge templates](#), which include a table of opportunity product data and modify this table as needed for your template. The `Opportunity_LineItem_Start` merge field must be inserted before all opportunity product merge fields and the `Opportunity_LineItem_End` merge field must be inserted after all opportunity product merge fields. These start and end fields trigger Salesforce to list all of the products on the opportunity.

## Insert Product Merge Fields Manually

If you also want to insert product merge fields into the table of opportunity product merge fields, you can do so manually.

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 dropdown.
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**.

## Considerations for Creating Extended 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.

- Extended Mail Merge supports Microsoft Word 2007.
- Extended Mail Merge doesn't support templates saved in .dotx file formats.
- Users can only generate mail merge documents for fields that are accessible to them via page layout and field-level security settings.

### EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: All editions

- Extended mail merge doesn't support formatting from rich text area fields.
- 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 can't be used in mail merge templates.

## Generate Mail Merge Documents Using Extended Mail Merge

Use Extended Mail Merge to generate a mail merge document that includes field data from your accounts, contacts, leads, cases, opportunities, and custom objects. Or you can generate multiple documents at the same time.

### [Generate a Single Mail Merge Document](#)

With Extended Mail Merge, you can generate a single mail merge document that includes field data from your accounts, contacts, leads, cases, opportunities, and custom objects.

### [Generate Mass Mail Merge Documents](#)

With Extended Mail Merge, you can generate mail merge Microsoft® Word documents—such as form letters with matching envelopes and address labels—for multiple records at the same time.

#### EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: All editions

## Generate a Single Mail Merge Document

With Extended Mail Merge, you can generate a single mail merge document that includes field data from your accounts, contacts, leads, cases, opportunities, and custom objects.

 **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

 **Note:** Before generating your mail merge, we recommend reviewing [Considerations for Using Extended Mail Merge](#) on page 756.

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.

1. Click **Mail Merge** in the Activity History related list on the appropriate record.
2. Verify that the appropriate record is chosen for merging. If not, use the lookup to specify a different record.
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. Depending on your settings, 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, you're prompted to create a task and a follow-up task.

The `subject` of the mail merge task is set to the mail merge template name by default. The task is displayed as a completed activity in the Activity History related list. The merged document isn't stored with the task.

If you meet these requirements, you can log an activity for mail merge.

#### EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: All editions

- You have access to view or edit the record that you're merging.
  - You're 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.

SEE ALSO:

[Extended Mail Merge](#)

[Generate Mass Mail Merge Documents](#)

## Generate Mass Mail Merge Documents

With Extended Mail Merge, you can generate mail merge Microsoft® Word documents—such as form letters with matching envelopes and address labels—for multiple records at the same time.

 **Note:** Before generating your mail merge, we recommend reviewing [Considerations for Using Extended Mail Merge](#) on page 756.

To generate Microsoft Word documents for multiple records, such as when sending a mass mailing, see the [Salesforce Bulk Mail Merge Process](#) document.

Alternatively, Extended Mail Merge lets users easily generate mail merge documents—such as form letters with matching envelopes and address labels—for multiple records at the same time.

To generate mass mail merge documents using the Extended Mail Merge feature, follow these steps.

1. Click the accounts, contacts, or leads tab. Other kinds of records aren't 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** 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. 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:

### EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: All editions

- 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 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.

## SEE ALSO:

[Extended Mail Merge](#)

[Generate a Single Mail Merge Document](#)

## Considerations for Using Extended Mail Merge

Consider these items when using Extended Mail Merge to generate Microsoft Word mail merge documents.

- Extended Mail Merge supports Microsoft Word 2007.
- Extended Mail Merge doesn't 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 Extended mail merge from a record detail page doesn't trigger standard workflow and validation rules for that record.
- When making mass mail merges, you can merge documents for up to 1,000 records at one time.
- A mail merge template can be up to 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.

## Use Email to Salesforce to Relate Emails to Records

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.

### [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.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

### [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.

### [Maintaining Email Security](#)

Salesforce provides tools to ensure that the integrity of your network isn't compromised when sending and receiving emails to maintain regulatory compliance. Before sending emails from any Salesforce platform, consider implementing these security measures. While optional, enabling them provides the most effective barrier of protection around the network.

## 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.



**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.

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](#)

[Guidelines for Using Email to Salesforce](#)

### EDITIONS

Available in: both Salesforce Classic 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.

1. 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
  - SenderId
  - 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?](#)

SEE ALSO:

[How Does Email to Salesforce Work?](#)

## 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.

SEE ALSO:

[Considerations for Using Email to Salesforce](#)  
[Guidelines for Using Email to Salesforce](#)  
[Set Up Email to Salesforce](#)

## Relate Emails to Leads, Contacts, or Opportunities

Relate emails sent from external email applications to leads, contacts, or opportunities.

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**

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions**

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.

## Relate Emails to Leads, Contacts, or Opportunities

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.
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: 701D000000HQZY`.
4. Enter your Email to Salesforce address in the **To**, **CC**, or **BCC** field.
5. Send the email.

## 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.

### 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**

## 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®.
- 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.

#### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

### 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.
- Some limits depend on whether you're using Salesforce Classic or Lightning.

Limit	Salesforce Classic	Lightning
Limit for a file attached directly to the related list	25 MB	2 GB
Limit for an outgoing email including all attachments	25 MB	25 MB
Number of file attachments	More than 10 files can be attached when sending an email.	Up to 10 file attachments when sending an email. If Salesforce Inbox is enabled, you can include up to 50 attachments.

For each matching record, attachments that are sent with the email are duplicated, which affects your data size limit. Attachments that aren't added to the outgoing email are listed in a confirmation email that you receive from Salesforce.

- Email text and HTML are truncated to 131 KB. Anything after that length is truncated.

## Guidelines for Using Email to Salesforce

If you're using Email to Salesforce, review a few key points for additional information.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All Editions**

### 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, 901D0000000JSBa`.

## Maintaining Email Security

Salesforce provides tools to ensure that the integrity of your network isn't compromised when sending and receiving emails to maintain regulatory compliance. Before sending emails from any Salesforce platform, consider implementing these security measures. While optional, enabling them provides the most effective barrier of protection around the network.

### EDITIONS

Available in: All editions

### Email Privacy

Give users the opportunity to opt out of emails entirely or receive them less frequently. Users might want to know about promotions but perhaps only once per week, not every day. Let users respond on your website or by calling a dedicated phone number. Process their request immediately.

### Email Security

When sending email, use a strong encryption method. Encryption uses complex algorithms to scramble the data that is sent. Encrypted data using proper protocols makes interception by malicious users much more difficult.

## Email Best Practices

When sending an email, ensure that the subject and content of the email match. The subject line should quickly capture the reader's attention and express the purpose. For example, Sam works for XYZ Doctor's office and is tasked with sending patient reminder emails. Instead of sending patient reminders, Sam sends promotional marketing material to 500 patients per day. These patients can't find their appointment details in the email and are forced to call in, clogging the phone lines.

Be respectful of users and don't inundate them with messages. Users have a pattern in their mind of how many email messages to expect from retailers, the government, politicians, and doctor's offices. Utilize surveys and user feedback to anticipate the appropriate number of emails to send to your customers.

In most cases, users ignore emails if they haven't provided permission to receive them or aren't familiar with the sender. Before sending out mass emails or even a personalized email, be sure that the user has given you explicit permission. If the user blocks you or marks your email as spam, your details won't make it through.

## Transaction Layer Security (TLS)

TLS (version 1.2 and later) encrypts the contents of mail during transmission. By default, mail sent from Salesforce uses TLS when it's supported by the receiving Mail Transfer Agent (MTA).

Salesforce no longer supports TLS version 1.0. If TLS 1.0 is used, emails are sent unencrypted.

Review the TLS options in [Transaction Layer Security \(TLS\)](#) to add additional security protection to your email and network.

## Sender Policy Framework (SPF)

SPF helps improve the deliverability of messages and protects the credibility of the emails. The domain owner publishes DNS TXT records that identify the IP addresses of the sending gateways. Then, the receiving gateways complete an SPF lookup to determine if the sending email server's IP address is valid within the SPF scope.

To protect against spamming and email spoofing, businesses often implement security controls that reject email messages that use their own domain name. Email messages are rejected if they can't be authenticated as coming from the alleged sender. Salesforce is an on-demand service that checks emails on behalf of customers. As a result, legitimate emails sent from Salesforce can be blocked before reaching the recipient. To ensure that email sent from Salesforce doesn't appear spoofed, consider implementing message authentication using DKIM, SPF, or DMARC. By enabling SPF, admins can ensure that they're sending emails from a valid email. Admins should also enable email security compliance features or use email relay to have Salesforce route the mail through their own servers. Admins can apply security measures to have Salesforce route the email through their own servers. [Sender Policy Framework](#) is an additional security feature but isn't a standalone to solve all email problems.

## Domain Keys Identified Mail (DKIM)

DKIM enables you to add a signature to emails. The signature indicates that the mail was authorized by the signing party. The signature also guarantees that the body and specific headers in the email haven't been compromised in transit.

## Domain-Based Message Authentication, Reporting, and Conformance (DMARC)

DMARC is an email policy and reporting protocol built on top of the SPF and DKIM protocols. The [DMARC policy](#) tells the receiver what to do if neither protocol succeeds. It also can allow the receiver to report back to the sender.

## Email Security Compliance

As an optional feature, Salesforce can modify the From field of emails that are sent from Salesforce to comply with SPF.

## Sender ID

Sender ID is an obsolete protocol. Use it only when working with a deprecated version of Microsoft Outlook that requires it.

The Sender ID protocol works similarly to SPF. It verifies a domain from the message's headers rather than the email's From field. To deliver mail to a recipient who requires a Sender ID, enable it on the Salesforce Email Deliverability setup page. Sender ID can automatically populate the Sender field of every email that is sent from Salesforce with `no-reply@salesforce.com`. Enabling Sender ID allows you to prevent spoofing and to prevent malware. While most antimalware and strong firewalls can detect spoofing, this feature provides an additional layer of protection.



**Note:** If your Salesforce org was created in Summer '24 or later, you can't enable Sender ID compliance in Email Deliverability settings.

## Bounce Management

[Bounce management](#) keeps your contact list up to date by flagging addresses that Salesforce couldn't deliver to. When bounce management is active and a user sends an email to an invalid address, Salesforce displays an alert next to that email address. You can't send emails to these addresses until they're updated. Optionally, you can send a bounce notification to the sender. This option applies to all users in the organization and can't be enabled on a per-user or per-email basis.

## Sending Directly from Salesforce

You can send emails directly from Salesforce using your domain name. When performing these sends, consider these configuration options depending on your preferences and security policies.

To pass SPF and Sender ID, Salesforce might modify the Envelope From and add a Sender header. To avoid modifying the Envelope From, turn off **Email Security Compliance and Bounce Management**. To avoid adding a Sender header, turn off **Sender ID**. You can manage these settings in the admin panel.

Option	Bounce Management (leads and contacts only)	Envelope From	Header From	Sender Header	SPF Status
None	Off	user@example.com	user@example.com	None	Pass only if the example.com SPF record includes <code>_spf.salesforce.com</code>
Email Security Compliance Enabled	Off	*.bnc.salesforce.com	user@example.com	None	SPF Pass
Security Compliance Enabled and Sender ID compliance	Off	*.bnc.salesforce.com	user@example.com	no-reply@salesforce.com	SPF pass, SenderId Pass
None	On	*.bnc.salesforce.com (if contact or lead) otherwise user@example.com	user@example.com	None	SPF Pass

Option	Bounce Management (leads and contacts only)	Envelope From	Header From	Sender Header	SPF Status
Email Security Compliance Enabled	On	*.bnc.salesforce.com	user@example.com	None	SPF Pass
Security Compliance Enabled and Sender ID compliance	On	*.bnc.salesforce.com	user@example.com	reply@salesforce.com	SPF pass, SenderId Pass

SPF verifies that the Envelope From domain authorizes the sending IP to send mail for the specified domain. This information is stored in DNS TXT records. SPF passes as long as the information is to a valid Salesforce domain.

## DKIM Signing

Salesforce supports the ability for users to create [DKIM keys](#). DKIM keys sign messages sent from Salesforce.

DKIM keys generate two public/private key pairs and add the values to the Salesforce DNS. Two keys are required to facilitate a rotation. These keys provide the user with CNAME records that are added to the domain's DNS. When the CNAME records are present, make the DKIM keys active in Salesforce.

## DMARC

SPF or DKIM must pass to use [DMARC](#). If neither passes, mail can't be sent through a Salesforce application.

## Configure an Email Relay

Salesforce supports the ability for customers to relay mail through their servers. The relay server then sends the mail to the Internet. The benefits of email relay are auditing requirements, internal policy, and security. This action uses a server-to-server relay type. To secure your relay, we recommend a combination of these security measures.

1. Configure Salesforce relay to use TLS. You can require TLS to verify the hostname on the receiver's certificate.
2. Set up the receiving MTA to check the sender' certificate and domain name to ensure that it matches the certificate presented.
3. Configure the receiving MTA to ensure that the sending domain is the email domain.
4. Set up the receiving MTA to verify that an X-SFDC-LK header contains the org ID.
5. Configure the DKIM signing in Salesforce.
6. Configure the receiving MTA to verify that DKIM passes and that the domain it was signed for is the domain.
7. Set up SMTP Auth, if it works with the MTA.
8. Configure the receiving MTA to allow only mail sent from the Salesforce relay IPs and any other IPs that the user is expecting mail from. We don't recommend using allow lists for securing your email relay. When an org moves or migrates, the sending IP addresses

will be different. If you miss any of the sending IP addresses in your allow list, it will likely result in delivery issues. We suggest using a combination of the above security measures.

SEE ALSO:

[Enable Email Security Compliance](#)

## Work With Salesforce's Email in Sales Cloud

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

### [Send Email Through 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?

### [Draft a Sales Email with Einstein Generative AI](#)

Use the power of Einstein to crush that next email. Einstein pulls in a contact's name and info to customize your email. But unlike a static template, Sales Emails creates a new, personalized output every time.

### [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.

### [Email Allocations per Edition](#)

See the allocations for email and email templates per edition.

### [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.

### [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.

### [Email a Group with 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 Through 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.

#### [Considerations for Sending Email from Salesforce](#)

Before you send email from Salesforce, it's important to ensure that your email gets to your recipient's inbox. Make sure that you comply with commercial email regulations. Learn about common deliverability hurdles and how to protect your email reputation.

#### [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™ or Office 365™ 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.

## Which Option for Sending Email from Salesforce Is Best for Your Organization?

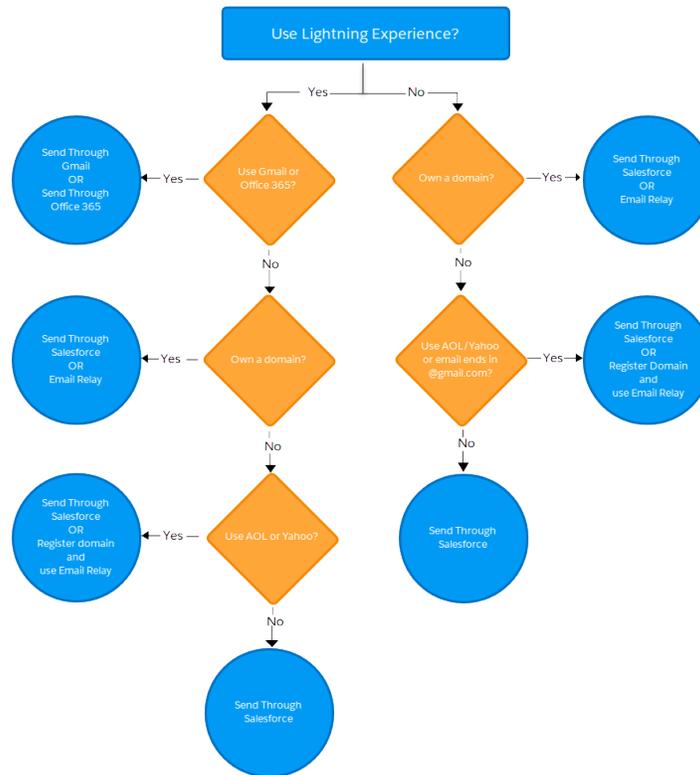
There are several options that let your users send email right from Salesforce. These options depend on whether your organization uses Lightning Experience, whether your company owns an email domain, and which email application your company uses.

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](#)
- [Explore Email and Calendar Integration Products](#)

## Considerations for Sending Email from Salesforce

Before you send email from Salesforce, it's important to ensure that your email gets to your recipient's inbox. Make sure that you comply with commercial email regulations. Learn about common deliverability hurdles and how to protect your email reputation.

### [Commercial Email Regulation Considerations](#)

Sending unsolicited email puts your brand and company at risk. Consumers are increasingly aware of legislation regulating commercial email and intolerant of unsolicited mail in their inboxes. Repeated unsolicited emails can lead to complaints and Internet Service Providers (ISPs) blocking your emails. Learn some basic steps you can take as part of your compliance with regulations affecting commercial email like the CAN-SPAM Act and GDPR.

#### EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: all editions

### [Common Email Deliverability Hurdles](#)

Review common obstacles to delivering your email to your recipient's inbox. Understand what you can do to help your users receive all the email you send from Salesforce.

### [Guidelines for Protecting Your Email Reputation](#)

One of the main drivers for email deliverability is the reputation of your IP and domain. When an email is sent, it is associated with a particular IP and domain. The IPs used for email delivery gain a reputation over time, as does your domain.

## Commercial Email Regulation Considerations

Sending unsolicited email puts your brand and company at risk. Consumers are increasingly aware of legislation regulating commercial email and intolerant of unsolicited mail in their inboxes. Repeated unsolicited emails can lead to complaints and Internet Service Providers (ISPs) blocking your emails. Learn some basic steps you can take as part of your compliance with regulations affecting commercial email like the CAN-SPAM Act and GDPR.

The CAN-SPAM Act is the U.S. Federal law regulating commercial email that took effect on January 1, 2004.

The General Data Protection Regulation (GDPR) is a comprehensive European privacy law that took effect on May 25, 2018. The GDPR regulates the "processing" of data for EU individuals, which includes collection, storage, transfer, or use. Any organization that processes personal data of EU individuals is within the scope of the GDPR, regardless of whether the organization has a physical presence in the EU. Although GDPR is larger than email, it includes specific requirements affecting commercial email.

Tips for commercial email:

- Make sure that subject lines are not deceptive or misleading.
- Always capture affirmative consent from your users.
- Process unsubscribe requests within 10 days and enforce them across your entire enterprise.
- For transactional or relationship messages, make sure that the subject line is non-promotional.
- Within the message, place the transactional content above any commercial content.

SEE ALSO:

[Abuse and Compliance](#)

[Data Protection and Privacy](#)

[GDPR.EU: How does the GDPR affect email?](#)

[Salesforce Agreement and Terms: Acceptable Use and External-Facing Services Policy](#)

## Common Email Deliverability Hurdles

Review common obstacles to delivering your email to your recipient's inbox. Understand what you can do to help your users receive all the email you send from Salesforce.

### Spam

Email spam, also known as junk email, is unsolicited messages sent in bulk by email. Most Internet Service Providers (ISPs) filter out spam from their users' inboxes. More than 300 companies offer

#### EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: all editions

#### EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: all editions

spam filtering services, although their filter logic varies. The most common spam filters are based on keywords or email content. Others use email volume, customer complaints, or blocklists in their filtering logic.

## Blocklists

Several high priority blocklists use a spamtrap or “honeypot” email address to identify spammers. The owner reserves these addresses and doesn’t use them to receive email. Any email sent to these reserved addresses is identified as spam. The blocklist owners plant these email addresses in various lists that can be purchased for sending mass unsolicited email. That’s why it’s important to never use purchased email lists. Only send email when you have obtained consent from the recipient to do so.

Salesforce monitors the IPs we use to send mail to ensure that they aren’t on the high priority blocklists. On the rare occasion that one of our IPs ends up on a major blocklist, we work as quickly as possible to identify the cause. We then work with the blocklist owner to clear the entry and with the customer that caused the issue. Usually, the cause of the issue is an accident or misunderstanding rather than a malicious action. Sometimes, we must remove an organization's ability to send mail while we work with them to clean up the issues that led to the blocklisting.

## Feedback Loops

Some email services provide the user with the option to flag email as spam. This action registers a complaint that some mailbox providers collect so they can provide visibility back to the senders. The sender can then remove the recipient from the specific campaign or database.

Salesforce collects this feedback loop data but doesn’t currently make it available to our customers.

## Allowlists

Salesforce sends email from a growing list of IP addresses. If your organization blocks any of these IP addresses, it can prevent users from receiving all emails sent from Salesforce.

We recommend that you avoid IP allowlists whenever possible and instead rely more on standard email security protocols (such as SPF, DKIM, and DMARC) to determine acceptance of email. For customers using Email Relay, we recommend that you use the standard email security mechanisms instead of restricting your relay to the Salesforce IPs.

If you must use an allowlist, then we recommend that you include all the Salesforce addresses used to send email. And don’t forget to regularly update your allowlist with changes published in the latest “Salesforce IP Addresses and Domains to Allow” knowledge article.

### SEE ALSO:

[Email Security Mechanisms](#)

[Knowledge Base Article: Salesforce IP Addresses and Domains to Allow](#)

[Salesforce Agreement and Terms: Acceptable Use and External-Facing Services Policy](#)

## Guidelines for Protecting Your Email Reputation

One of the main drivers for email deliverability is the reputation of your IP and domain. When an email is sent, it is associated with a particular IP and domain. The IPs used for email delivery gain a reputation over time, as does your domain.

### EDITIONS

Available in: both Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: all editions

## Determining Your Email Reputation

Several factors determine the email reputation of a domain or IP. The volume of emails sent and the percentage of invalid email addresses used influence your email reputation. Your recipients' engagement with your emails and the quality of your email content also affect the reputation of the sending IP and your domain.

If you don't send enough emails, your IP can't gain sufficient reputation to have good deliverability. Although it's less common, sending too many emails can tarnish an IP's reputation. To protect the email reputation of your IP or domain, avoid sending emails including malformed HTML, malicious content, or "spammy" keywords. We recommend that you regularly review your email logs and remove invalid addresses. Cleaning up invalid addresses helps with deliverability and reduces the potential for harm to your email reputation. Finally, make sure that your email has content your recipients need and value. Your recipients' engagement with your emails matters. Your email reputation improves when they read your emails and suffers when they mark your email as spam.

## Sender Reputation Monitoring

Reputational damage to the IPs Salesforce uses to send email can hinder the ability of both Salesforce and its customers to deliver email. We protect the reputation of all email sent by Salesforce by closely monitoring more than 50 major international blocklists. If a customer sends an email that causes one of our domains or IP addresses to be added to one of these blocklists, Salesforce is alerted. We then investigate and work with the blocklist owner to resolve the issue. We also educate customers on proper sending practices so that we can maintain our reputation and improve deliverability.

## Get Permission from All Email Recipients

Failing to get explicit permission from your recipients often results in high complaint rates, damaging your email reputation. Have your customers opt in before receiving email from your organization, provide a method for them to opt out, and quickly honor opt-out requests.

## Include Your Organization's Name in the Subject Line

Whenever possible, we recommend that you include the name of your organization in the subject line of your emails. Make sure that the name is familiar to your recipients for quick recognition. Users who don't recognize the sender often click the "report spam" button without even opening the email.

## Bounce Management

No matter how careful you are, some of the emails sent from Salesforce bounce due to stale email addresses, typos in those addresses, or other delivery issues. We recommend that you proactively monitor your bounced emails and remove bad email addresses. Doing so protects your email reputation by reducing the percentage of bad email addresses you send to.

You can use the Bounce Management feature to automatically flag invalid addresses through fields that appear on the contact, lead, and person account list views.

Admins can also request an email log to review the last 30 days of your organization's email activity. Use these logs to identify bad email addresses and remove them from your org.

### SEE ALSO:

[What's the Difference Between Commercial and Non-Commercial Email?](#)

[Data Protection and Privacy](#)

[Enable Email Bounce Handling](#)

[Use Email Logs to Monitor Emails Sent from Salesforce](#)

## 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.

### [Considerations for Send Email Through Gmail™ or Office 365™](#)

Review 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.

#### EDITIONS

Available in: Lightning Experience

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

## Considerations for Send Email Through Gmail™ or Office 365™

Review 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 isn't available in Communities. If your organization has Send Through Gmail or Office 365 enabled, it doesn't work in Communities. Instead, emails sent in Communities go through Salesforce or Email Relaying, depending on which option your organization has configured.
- Send through Gmail or Office 365 isn't available for Einstein Activity Capture or Salesforce Inbox users. With Einstein Activity Capture or Inbox enabled, users' emails are already sent through their connected Gmail or Outlook account.
- If you use Send through Gmail, visit your My Email Settings page in Salesforce to customize the name that shows in the From field of your outgoing emails. If you use Send through Office 365, you can't change the name in Salesforce.

When using Send through Gmail or Office 365:

- Emails aren't stored in Salesforce email logs, which means email delivery information isn't available in Salesforce. Salesforce email logs are only used for emails sent through Salesforce. Obtain email logs from Gmail or Office 365.
- List emails and emails sent by triggers and workflow rules are still sent through Salesforce.
- Emails sent from organization-wide email addresses 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 don't appear in emails sent from Salesforce.

#### EDITIONS

Available in: Lightning Experience

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

 **Note:** Sales Cloud email integrations aren't available for case management.

## SEE ALSO:

- [Send Through Gmail or Office 365](#)
- [Set Up Send Email from Salesforce with Gmail™ or Office 365™](#)
- [Send and Receive Emails with Email-to-Case](#)
- [Email Customers](#)

## 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: **Essentials, 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.

- API Name:Microsoft Graph
- Permission: Send mail as user
- API Name:Windows Azure Active Directory
- Permission: 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 *Deliverability* 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**.
2. 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**.

## 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™ or Office 365™ with Lightning Experience.

### [Considerations for Setting Up Send through Salesforce](#)

Review a few details before setting up Send through Salesforce, including information about bounce management and spam.

### [Set Up Send Email Through Salesforce](#)

Follow these steps for setting up Send through Salesforce, including details for companies that do and don't own a domain.

### [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 several settings and compliance options.

### [Use Email Logs to Monitor Emails Sent from Salesforce](#)

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: Lightning Experience

Available in: **Essentials, 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

### 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 information 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.
- To send mail through Salesforce, you must first verify that you own the sending email address. This requirement applies in production and sandboxes. New users verify their email when verifying their Salesforce account. Salesforce uses a variety of techniques to verify other email addresses, such as the email address for a user account created before account verification was required. If Salesforce is unable to confirm that an email address is verified, the user can't send email through Salesforce until that email address's verification is completed.

 **Note:** Unverified users sometimes still can send an email depending on when their account was created. If the account was created 4 to 5 years ago and the user logged in recently, sending an email as an unverified user is possible.

- If email authentication isn't configured properly using these recommendations, 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 sometimes can be identified as sent through Salesforce. The emails can appear as though 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 such as Sender Policy Framework (SPF) or DomainKeys Identified Mail (DKIM) in your DNS to ensure better delivery and acceptance by recipients.

### EDITIONS

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

Available in: **All** editions

## Set Up Send Email Through Salesforce

Follow these steps for setting up Send through Salesforce, including details for companies that do and don't own a domain.

### For Companies That Own a Domain (mycompany.com)

- Turn off "Enable compliance with standard email security mechanisms."
- Turn off "Enable Sender ID compliance."
- [Add Salesforce's SPF record](#) to client's domain DNS to indicate that Salesforce is an approved sender.
- [Set Up Secure DKIM Keys](#) for better deliverability.

### EDITIONS

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

Available in: **All** editions

### For Companies That Don't Own a Domain

If your company doesn't own its email address domain, and the domain name ends in @gmail.com, @aol.com or @yahoo.com, register for a domain that your company controls. Use this new domain for all of your emails sent from Salesforce, because of the Domain-based Message Authentication, Reporting & Conformance (DMARC) policy at Gmail, AOL™, and Yahoo™. [Learn More](#)

- Turn on "Enable compliance with standard email security mechanisms."
- 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.

## 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 several settings 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 email 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.

### [Enabling Compliance BCC Emails](#)

If your organization evaluates all outbound email messages for compliance, you can enable compliance BCC emails.

#### EDITIONS

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

Available in: **All** editions

## 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 email 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.

1. 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.

If you didn't receive all the test messages, your organization's email administrator must add the Salesforce IP ranges to the allowlist for your organization's email server. When you add those IP addresses to the list of trusted addresses, the email server can receive email that might otherwise be blocked. For a current list of Salesforce IP ranges, see [Salesforce IP Addresses and Domains to Allow](#).

#### EDITIONS

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

Available in: **All** editions except **Database**

#### USER PERMISSIONS

To test email deliverability:

- **Modify All Data**

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](#)

## 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`: This setting prevents all outbound email to and from users. All password reset emails continue to send.
  - `System email only`: This setting allows only automatically generated emails, such as new user and password reset emails. Enable this setting to control 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`: This setting allows all types of outbound email. New, non-sandbox organizations default to this setting. 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: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Available in: **All** editions except **Database**

### USER PERMISSIONS

To configure email deliverability:

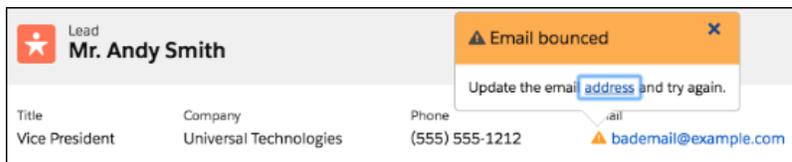
- Customize Application

### EDITIONS

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

Available in: **All** editions except **Database**

- If an email to a contact, lead, or person account bounces, an alert icon appears next to the email address in the detail page. The icon appears when a hard bounce is received (a permanent delivery failure). It doesn't appear with a soft bounce (a temporary delivery failure).



Ensure that the email address field is in the highlights panel of the detail page so that users can see the alert.

 **Note:** 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 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. This setting is the default.
  - `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 isn't signed or the common name doesn't match, Salesforce disconnects the session and doesn't 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 aren't 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.

 **Note:** TLS 1.0 has been disabled.

#### 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](#)
- [Enable Email Bounce Handling](#)
- [Knowledge Article: Salesforce TLS 1.0 Email Disablement](#)

## 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.

 **Note:** When compliance BCC email is enabled, you can't use predefined values for the BCC field in the Send Email action.

To enable compliance BCC emails for your organization:

1. 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. Certain types of system emails, such as password reset and import completion emails, are excluded.

#### SEE ALSO:

- [Send Email Action Considerations for Cases](#)

#### EDITIONS

Available in: Salesforce Classic and Lightning Experience

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

#### USER PERMISSIONS

To enable or disable compliance BCC email:

- `Customize Application`

## Use Email Logs to Monitor Emails Sent from Salesforce

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 Through Salesforce](#)

## 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're received. Email logs are available within 30 minutes of your request.
- The pending email log requests list provides the status on email log requests that haven't yet completed.
- The email log errors list provides descriptions for requests that failed. You can't resubmit a failed request that requires data that has exceeded the 30-day limit, or if you already have three pending requests.
- 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 can't request another log until at least one of those requests completes.
- 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. Logs include inbound emails, as well as outbound emails.
- Emails sent through external systems such as Gmail or Office 365 aren't shown in email logs.
- You can't download any file from an org from which you don't belong. To download the file, contact your admin.
- Splunk indexes all of your search results. All indexes may not be available at the time of your query. For example, you can run two queries simultaneously and get varying results. Use this tool to resolve support issues, not for audit purposes.
- When your org is moved from one data center to another, the logs are retained in the old data center.

### SEE ALSO:

[Use Email Logs to Monitor Emails Sent from Salesforce](#)

### EDITIONS

Available in: Lightning Experience and Salesforce Classic

Email Logs is available in: **All Editions**

Mass Email Queue is available in: **Professional, Enterprise, Performance, and Unlimited Editions**

### EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: **All Editions**

## 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.

Use this tool for general troubleshooting and email delivery insights. Due to occasional limits on data availability, we recommend against using this tool for critical audits.

 **Important:** If your org migrates to a different data center, you'll no longer have access to logs from the previous data center.

1. From Setup, in the Quick Find box, enter *Email Log Files*, and then select **Email Log Files**.
2. Click **Request an Email Log**.
3. Specify a Start Time and End Time.
4. Optionally, you can filter an email log to only include entries 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 isn't filtered and all email addresses are returned within the specified time range.
5. Select the type of **Mail Event**.
  - a. If no option is selected, all email events are selected.
6. Select the type of **Email Direction**.
  - a. Specify **Outbound**, **Inbound**, or both **Outbound and inbound** emails.
  - b. If no option is selected, **Outbound** logs is selected.
7. Enter the email addresses that you want to receive a notification when the email log request is complete. Separate each email address with a comma.
8. Click **Submit Request**.

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](#)  
[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
B	Internal Message ID	The unique internal ID of the message	16/A4-20983-88E21E84
C	Mail Event	Indicates the final email event in the mail server. Events can be one of the following values: <ul style="list-style-type: none"> <li><b>R - Reception</b> The email was successfully received.</li> <li><b>D - Delivery</b> The email was successfully sent.</li> <li><b>T - Transient Failure</b> 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.</li> <li><b>P - Permanent Failure</b> The email could not be delivered.</li> </ul>	T

### 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 Envelope From address used in the email. The default value is the email address of the person who sent the email. If Email Security Compliance or Bounce Management are enabled, this address contains *.bnc.salesforce.com.	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
H	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 that the email delivery was in before it was logged. The values of the stages in the order that they appear during the SMTP sequence are: <b>BANNER</b> The SMTP connection response <b>EHLO</b> The beginning of the session with the mail server <b>STARTTLS</b> Establishes a secure communication session with the email server	during RCPT TO

Column	Field	Description	Example
		<p><b>MAIL FROM</b> Announces the sender of the email</p> <p><b>RCPT TO</b> Announces the recipient of the email</p> <p><b>DATA</b> Announces that the subsequent text is the email message</p> <p><b>BODY</b> The state when the body of the email is being sent to the recipient</p> <p><b>RSET</b> Resets the server state, ending the session</p> <p>In addition, there are responses that can appear at any point during the delivery sequence:</p> <p><b>while not connected</b> The client is trying to establish a connection</p> <p><b>while idle</b> The client has connected, but isn't sending or receiving any commands</p> <p><b>reading confirmation</b> A command was sent and the client is waiting for a response</p> <p><b>handshaking TLS</b> An error occurred while trying to establish a secure connection</p> <p><b>out of band bounce</b> The receiving server accepted a command, but then for an unknown reason rejected it</p> <p><b>in unknown state</b> An unknown error has occurred</p>	

Column	Field	Description	Example
M	Relay Address	The hostname of the designated relay system	relay.my.org
N	Relay Port	The port of the designated relay system	587
O	Delivery Status Notification	<p>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.</p> <p>The five possible values of the first digit are:</p> <p><b>1xx - Positive Preliminary reply</b> The command was accepted, but no response has been sent</p> <p><b>2xx - Positive Completion reply</b> The requested action has successfully completed</p> <p><b>3xx - Positive Intermediate reply</b> The command was accepted, but the requested action needs more information</p> <p><b>4xx - Transient Negative Completion reply</b> The command wasn't accepted and the requested action didn't occur. However, the error condition is temporary and the action may be requested again.</p> <p><b>5xx - Permanent Negative Completion reply</b> The command wasn't accepted and the requested action didn't occur</p>	421 no adequate servers

Column	Field	Description	Example
		<p>Every email service provider implements the codes differently, so there is no comprehensive list for what the second or third digits indicate.</p> <p>For more information on these codes, view the official SMTP documentation, section 4.2.1: <a href="http://www.ietf.org/rfc/rfc2821.txt?number=2821">http://www.ietf.org/rfc/rfc2821.txt?number=2821</a></p>	
P	TLS_Cipher	<p>If the email was sent successfully, the email's encryption.</p> <p>This information is valid only when <code>Mail Event</code> is set to D.</p> <p>The valid entries are:</p> <p><b>TLS version:cipher</b> The TLS version and cipher</p> <p>:</p> <p>The message wasn't encrypted</p> <p><b>None</b> The message was used for an internal delivery</p>	TLSv1.2:AES256-GCM-SHA384
Q	TLS_Verified	<p>If the email was encrypted and successfully sent, this value indicates whether the encryption certificate was verified against the configured certificate authorities.</p> <p>This information is valid only when <code>Mail Event</code> is set to D - Delivery.</p> <p>The valid entries are:</p> <p><b>Verified</b> The peer certificate was verified against the configured certificate authorities</p>	Verified

Column	Field	Description	Example
		<p><b>Unverified</b> The peer certificate wasn't verified against the configured certificate authorities</p>	
R	Email Direction	<p>The category of the email. The possible values are:</p> <p><b>Outbound</b> Emails that originate in Salesforce and sent to targeted recipients.</p> <p><b>Inbound</b> Emails sent via external senders to specific service addresses in Salesforce.</p>	Outbound
S	Sent via TLS	<p>Indicates whether the email was sent via TLS.</p> <p><b>true</b> Sent via TLS</p> <p><b>false</b> Sent without TLS</p>	true
T	TLS Option	<p>TLS setting used for the email.</p> <p><b>0</b> None</p> <p><b>1 - Preferred</b> If the message transfer agent (MTA) advertises TLS and a common cipher was negotiated, TLS was used. If TLS couldn't be negotiated, the email was delivered.</p> <p><b>2- Required</b> If TLS couldn't be negotiated or a common cipher couldn't be agreed on, the email bounced back to the originator.</p> <p><b>3- Preferred Verify</b> If the MTA advertises TLS, a common cipher was</p>	1

Column	Field	Description	Example
		<p>negotiated, and Salesforce verified the receiver, TLS is used. Verification means that a valid certificate authority has signed the receiver's certificate and the hostname in the certificate matches the host to which we connected. If TLS couldn't be negotiated or the verification failed, the email was delivered unencrypted.</p> <p><b>4 - Required Verify</b> If TLS couldn't be negotiated, a common cipher couldn't be agreed on, or the sender couldn't be verified, the email bounced back to the originator. Verification means that a valid certificate authority has signed the receiver's certificate and the hostname in the certificate matches the host to which we connected.</p>	
U	SPF status	<p>The Sender Policy Framework (SPF) authentication status of the email.</p> <p><b>Pass</b> SPF check succeeded, and the email passed the authentication process.</p> <p><b>Fail</b> The SPF check failed</p> <p><b>None</b> An SPF record wasn't published for the sender's domain.</p>	Pass
V	Sender ID status	Sender ID authentication status of the email.	Pass

Column	Field	Description	Example
		<p><b>Pass</b> The Sender ID check succeeded, and the email passed the authentication process.</p> <p><b>Fail</b> The Sender ID check succeeded, and the email passed the authentication process.</p> <p><b>None</b> The Sender ID check wasn't performed.</p>	
W	Sender ID PRA status	<p>The Sender ID PRA (Purported Responsible Address) authentication status of the email.</p> <p><b>Pass</b> The Sender ID PRA check succeeded, and the email passed the authentication process.</p> <p><b>Fail</b> The Sender ID PRA check failed, or the email failed the authentication process.</p> <p><b>None</b> The Sender ID PRA check wasn't performed.</p>	Pass
X	DomainKeys status	<p>DomainKeys status of the email.</p> <p><b>Pass</b> The DomainKeys check succeeded.</p> <p><b>Fail</b> The DomainKeys check failed.</p> <p><b>None</b> Typically occurs when a DomainKeys check wasn't performed.</p>	Pass

Column	Field	Description	Example
Y	Header From	The From field in the email header.	My Email <my.email@acme.com>
Z	DKIM Selector	<p>The DKIM selector of the email.</p> <p>A DKIM selector is a string used to locate the appropriate public key in the sender's DNS records.</p> <p>In this example DKIM signature, the DKIM Selector is selector202307</p> <pre>DKIM-Signature: v=1;   a=rsa-sha256;   d=example.com;   s=selector202307;   c=relaxed/simple;   q=dns/txt;   h=From:Subject:Date:Message-ID;    bh=XXXXXXXXXXXXXXXXXXXXXXXXX;    [Signature]</pre>	selector202307
AA	DKIM Domain	<p>The domain associated with the DKIM signature. Specifically, the domain that owns the cryptographic keys used to sign the email message.</p> <p>In this example DKIM signature, the DKIM Domain is example.com.</p> <pre>DKIM-Signature: v=1;   a=rsa-sha256;   d=example.com; ...</pre>	example.com

Column	Field	Description	Example
AB	DKIM_Success	<p>Indicates whether the DKIM-Signature header was included in the email headers.</p> <p><b>true</b> The email headers included the DKIM-Signature header.</p> <p><b>false</b> The email headers didn't include the DKIM-Signature.</p> <p><b>none</b> Either the DKIM Domain or DKIM Selector wasn't available.</p>	true

## SEE ALSO:

[Use Email Logs to Monitor Emails Sent from Salesforce Certificates and Keys](#)

*Knowledge Article: Checking the Permanent Failure Rate of emails sent from Salesforce*

## 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, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## Considerations for Using Enhanced Email

Review these considerations for using enhanced email, especially in Salesforce orgs where Email-to-Case is enabled.

### Email-to-Case

Email-to-Case uses the EmailMessage object to store emails related to cases. When enhanced email is off, case is the only object where email message records are created.

Enhanced email isn't on by default in orgs where Email-to-Case is enabled, to avoid possible issues if custom code was added by admins or developers. When custom code assumes that email messages only exist on case records, review that logic. Make sure the code confirms whether the email's parent record is a case, to ensure that the code executes when desired. You can then safely turn on enhanced email and use email message records with other object types.

### EDITIONS

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

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

### General

- Enhanced email allows email message records to be created across all object types where emails can be associated. These types include contacts, leads, accounts, opportunities, cases, campaigns, person accounts, and more.
- With enhanced email, emails are stored as email message records. The EmailMessage object gets you all the conveniences that come standard with Salesforce objects, including custom fields, page layouts, workflow rules, and triggers.
- An email message record is automatically duplicated as a task to provide backward compatibility with activity related lists and reporting.
  - In Salesforce Classic, these related emails are displayed in the Activity History list. The Email Message related list isn't supported in Salesforce Classic. Instead, use the Activity History related list on your page layouts.
  - In Lightning Experience, email messages are displayed in the Activity Timeline.

### Other Considerations

- Replace workflows designed for task-based emails with workflows based on the EmailMessage object.
- Review triggers and workflow rules that use the EmailMessage object to handle the many different types of email parent objects. 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.
- 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.
- If you select the **Secure guest user record access** option on the Sharing Settings Setup page, in the Other Settings section, guest users can't send emails with enhanced email.
- 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. The email sender and an admin with the appropriate permissions can delete an email message. Deleting an email message deletes the associated task, but deleting a task doesn't delete the associated email message.
- Email fields, including `RelatedToId`, 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.
- Even when enhanced email is enabled, emails added from Web-to-Lead and Salesforce for Outlook continue to be stored as task records only.  
If you use the Outlook integration and want to represent emails as email message records, enable enhanced email and select **Use Enhanced Email with Outlook** in the Outlook Integration and Sync setup page.

**SEE ALSO:**

[Use Enhanced Email for More Email Functionality](#)

[Set Up Enhanced Email](#)

[Enhanced Email and the Outlook Integration](#)

[Enhanced Email and the Gmail Integration](#)

## 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 Using Enhanced Email](#)

## Customized Fields in the Outgoing Email Action Layout

You can customize the Outgoing Email Action layout by removing fields or making them read-only. However, keep the following considerations in mind because your adjustments can affect other areas of the layout or require you to populate other fields with content.

### Fields in the Email Message Layout

Field	Consequence
Subject	<p>When you remove the Subject field from the layout, the Merge Field icon is hidden in the email composer.</p> <p>You can't send emails unless at least one of these fields has content.</p> <ul style="list-style-type: none"> <li>• Subject field</li> <li>• HTML Body or Text Body field</li> </ul> <p>As the sender, you can provide the content, or it can be automatically inserted using predefined values. An email template can also include the content for these fields.</p>

### EDITIONS

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

Available in: **Group, 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.

To use reply, reply all, and forward

- Read access to the leads and contacts who are email recipients

### EDITIONS

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

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

Field	Consequence
	 <b>Note:</b> When you also remove the HTML Body field from the layout, the Insert Template icon is hidden in the email composer.
HTML Body	<p>When you remove the HTML Body field from the layout, these icons are hidden in the email composer:</p> <ul style="list-style-type: none"> <li>• Merge field</li> <li>• Preview</li> <li>• Insert availability (requires an Inbox license)</li> </ul> <p>You can't send emails unless at least one of these fields has content.</p> <ul style="list-style-type: none"> <li>• Subject field</li> <li>• HTML Body or Text Body field</li> </ul> <p>As the sender, you can provide the content, or it can be automatically inserted using predefined values. An email template can also include the content for these fields.</p>
Text Body	<p>You can't send emails unless at least one of these fields has content.</p> <ul style="list-style-type: none"> <li>• Subject field</li> <li>• HTML Body or Text Body field</li> </ul> <p>As the sender, you can provide the content, or it can be automatically inserted using predefined values. An email template can also include the content for these fields.</p>
Recipient (To:, Cc:, and Bcc:)	You can't send emails unless there's at least one recipient.

## SEE ALSO:

[Use Insert Availability to Optimize Meeting Scheduling](#)

## 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

Before setting up Email Relay, review details about bounce management and spam.

#### 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.

#### 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. An email domain filter must be set up for email relay to work.

## Considerations for Setting Up Email Relay

Before setting up Email Relay, review details about bounce management and spam.

- Email Relay is a good option if:
  - You want to route email sent from Salesforce through your company's mail service, such as 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.

Use Email Relay and Bounce Management with care as 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, 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 a SPF soft failure. It doesn't mark your message as invalid, but it reduces your deliverability.

There are two solutions:

- Establish a DMARC policy for your domain, and use Salesforce's DKIM signing feature to sign outgoing mail. With this combination, your mail passes a DMARC check even though it doesn't pass SPF.
- Turn off bounce management in Salesforce.

### Deliverability Settings and Email Relay

When email relay is enabled in Salesforce, companies don't always need all the Salesforce Email Deliverability settings from 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 because 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>

#### EDITIONS

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

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

Disable these 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 shows the envelope-from and the 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 the mail that you intend to.

- Include only the IPs that you want to use to relay mail for ours and any others in your relay's allowlist.
- Only relay mail that's 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.
- Enable SMTP authentication between Salesforce mail servers and your email relay host. Test this feature in a sandbox to ensure that it works as expected. Some email services don't support SMTP authentication for email relays.

## Copying Sandbox with Email Relay

When you copy a sandbox, Email Relay data is copied to the sandbox org. This data includes authentication data stored on an Email Relay record, such as IsRequireAuth, Password, and Username. If you don't want production authentication data in your sandbox copy, modify the Email Relay in Setup.

Alternatively, you can execute this sample Apex code in your Sandbox [Developer Console](#) to remove authentication data from the EmailRelay records.

```
System.debug('Executing sandbox postcopy update for EmailRelay');
// Query all EmailRelay objects with non-empty credentials and reset.
List<EmailRelay> relays = [SELECT Id FROM EmailRelay WHERE IsRequireAuth = true OR Username
    != null];

for (EmailRelay relay : relays) {
    relay.IsRequireAuth = false;
    relay.Username = null;
    relay.Password = null;
}

update relays;
System.debug('Updated ' + relays.size() + ' EmailRelay objects');
```

SEE ALSO:

[Set Up Email Relay](#)

## 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.

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.

1. From Setup, in the Quick Find box, enter *Email Relays*, and select **Email Relays**.

2. Select **Create Email Relay**.

3. For Host, enter a mail domain, hostname or IP address.

If you provide a name, Salesforce checks for valid Domain Name Service (DNS) mail exchange (MX) records first. If none are found, we look for a DNS Address (A) record. If you plan to use Transport Layer Security (TLS) with this connection, enter the hostname instead of the IP address. TLS requires the hostname for verifying certificates.

Here are examples of valid formats.

- Mail domain: `myemaildomain.com`
- Mail server hostname: `mail.myemaildomain.com`
- IP address: `100.121.20.5`

4. For Port, enter the 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.

5. Select a TLS Setting. This setting controls whether Salesforce uses TLS for SMTP sessions.

- 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. This setting is the default.
- 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 isn't signed or the common name doesn't match, Salesforce disconnects the session and doesn't 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 aren't met, Salesforce terminates the session without delivering the email.

If you use TLS verification, an MX or an A record for your hostname is required in Public DNS. Canonical Name (CNAME) DNS records can't be used for relays with TLS verification.

6. Optionally, to enable authentication with a username and password for this email relay.

a. Select **Enable SMTP Auth**.

When you enable this setting, the TLS Setting changes to the required value, Required Verify.

b. In the Auth Type field, select a Simple Authentication and Security Layer (SASL) mechanism to use for SMTP authentication.

- To use the `PLAIN` SASL mechanism, select **Auth Plain**. This is the default Auth Type when you enable SMTP Auth.
- To use the `LOGIN` SASL mechanism, select **Auth Login**.

### 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

Salesforce supports only the `PLAIN` and `LOGIN` SASL mechanisms.

- c. For Username, enter the username for SMTP authentication.
- d. For Password, enter the password for SMTP authentication.
- e. In the Confirm Password field, reenter the password for SMTP authentication.

Before you enable SMTP authentication, test this feature in a sandbox to ensure that it works as expected with your email relay. Some email services don't support SMTP authentication for email relays.

If you deselect **Enable SMTP Auth**, Salesforce saves your authentication credentials but doesn't route email to your company's email server using SMTP authentication.

7. Save your changes.
8. [Set up an email domain filter](#). You must set up an email domain filter for email relay to work.

Salesforce recommends that you send a test message each time you change the email relay configuration.

If you set up multiple email relays in one org, they're processed in the priority order of their email domain filters. By default, email domain filters are evaluated in the order that they were created. To change the evaluation order, use the `PriorityNumber` field on the `EmailDomainFilter` object SOAP API. If no matching rule for email relay is found, then the email is sent via the Salesforce Mail servers.

SEE ALSO:

[Test the Deliverability of Emails Sent Through Salesforce](#)

[Enabling Compliance BCC Emails](#)

[SOAP API Developer Guide: EmailDomainFilter](#)

## 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. An email domain filter must be set up for email relay to work.

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.

1. Set up an email relay [email relay](#), if you haven't already.
2. From Setup, in the Quick Find box, enter *Email Domain Filters*, and then select **Email Domain Filters**.
3. Select **Create Email Domain Filter**.
4. Configure these 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 *.

### 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

Setting	Description
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.

The wildcard character (\*) must precede a second-level domain name. For example, \*.example.com includes all subdomains of example.com.

##### 5. Save the page.

If you set up multiple email domain filters, only the first matching filter applies. By default, email domain filters are evaluated in the order that they were created. Use the `PriorityNumber` field on the `EmailDomainFilter` object SOAP API to change the evaluation order. If no matching rule for email relay is found, then the email sends via the Salesforce Mail servers.

SEE ALSO:

[SOAP API Developer Guide: EmailDomainFilter](#)

## Draft a Sales Email with Einstein Generative AI

Use the power of Einstein to crush that next email. Einstein pulls in a contact's name and info to customize your email. But unlike a static template, Sales Emails creates a new, personalized output every time.

[Watch a demo.](#)

1. You can use Einstein to create emails in Salesforce and in Salesforce email integrations for Outlook and Gmail.
  - In Salesforce, open the email composer anywhere in Lightning Experience.
  - In Gmail or Outlook integrations, locate the Einstein Sales Emails component in the email application pane.
2. Enter a recipient with a contact or lead record in Salesforce, where the record has an email address.
3. Click **Draft with Einstein**.

### EDITIONS

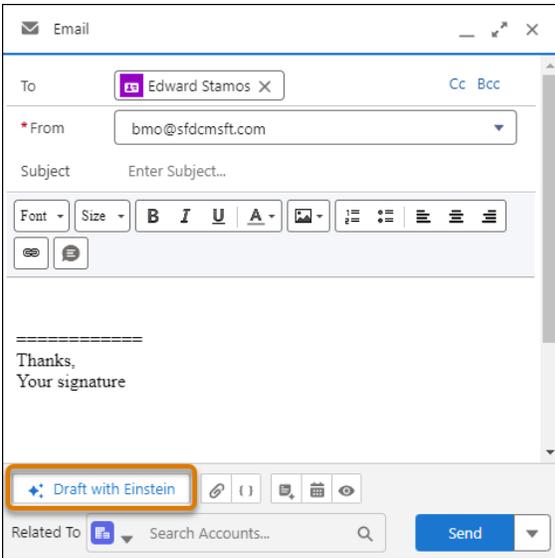
Available in: Lightning Experience

Available with the Einstein for Sales add-on, which is available for an extra cost in **Performance** and **Unlimited** Editions.

### USER PERMISSIONS

To send sales emails using Einstein generative AI:

- Einstein Sales Emails Permission Set



4. Decide whether to use pre-made email instructions or create your own.
5. Review and send the email.

**Important:** This tool uses generative AI, which is known to include inaccurate or harmful responses. Before sharing externally, review the output for accuracy and safety. You assume responsibility for the output when sharing.

#### [Use Pre-Made Email Instructions to Draft a Sales Email](#)

Ask Einstein generative AI to draft some of your most common types of emails, such as introductions and follow-up nudges. Like email templates, Einstein pulls in a contact's name and information to customize your email. But unlike a static template, Einstein creates personalized output every time.

#### [Use Einstein Generative AI and Personal Email Instructions to Draft a Sales Email](#)

Use your own instructions with Einstein generative AI to draft your sales emails. Like email templates, Einstein pulls in a contact's name and information to customize your email. But unlike a static template, Sales Emails creates unique, personalized output every time.

#### [Control If Users Can Enter Their Own Sales Email Prompt Instructions](#)

Salesforce admins can control if anyone can enter instructions for Einstein to use in creating a unique draft email. This feature is on by default.

SEE ALSO:

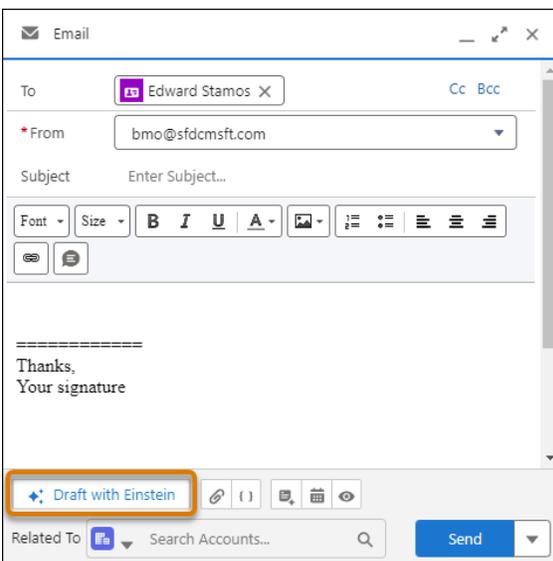
[Salesforce Help: Prompt Builder](#)

## Use Pre-Made Email Instructions to Draft a Sales Email

Ask Einstein generative AI to draft some of your most common types of emails, such as introductions and follow-up nudges. Like email templates, Einstein pulls in a contact's name and information to customize your email. But unlike a static template, Einstein creates personalized output every time.

You can choose from pre-made email types and custom email types created by an admin.

1. Use Einstein to create emails in Salesforce and in Salesforce email integrations for Outlook and Gmail.
  - In Salesforce, open the email composer anywhere in Lightning Experience.
  - In Gmail or Outlook integrations, locate the Einstein Sales Emails component in the email application pane.
2. Enter a recipient with a contact or lead record in Salesforce.
3. Click **Draft with Einstein**.



4. Select a pre-made email instruction.

### EDITIONS

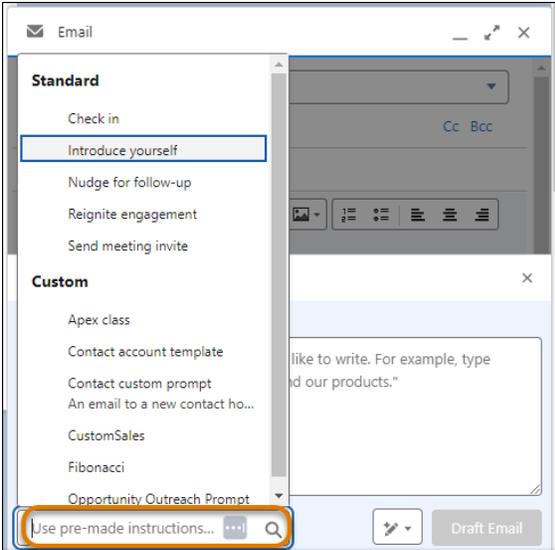
Available in: Lightning Experience

Available with the Einstein for Sales add-on, which is available for an extra cost in **Performance** and **Unlimited** Editions.

### USER PERMISSIONS

To send sales emails using Einstein generative AI:

- Einstein Sales Emails permission set



Depending on the email type, you can be asked to include related object information, such as product information. Select or search for a product and click **Continue**.

5. After Einstein drafts the email, review the output and edit it as you like before sending. Each time you choose pre-made email instructions, you get a personalized response.

Be sure to fill in any missing details where Einstein leaves a spot for you to customize the email. For example, when the email suggests a meeting with the customer, you see [Customize: DATE AND TIME] where you can add a possible meeting time.

6. Send the email.

**Important:** This tool uses generative AI, which is known to include inaccurate or harmful responses. Before sharing externally, review the output for accuracy and safety. You assume responsibility for the output when sharing.

SEE ALSO:

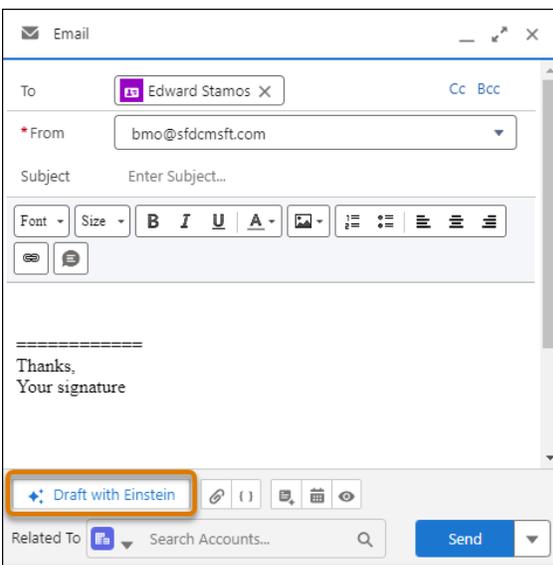
[Salesforce Help: Prompt Builder](#)

## Use Einstein Generative AI and Personal Email Instructions to Draft a Sales Email

Use your own instructions with Einstein generative AI to draft your sales emails. Like email templates, Einstein pulls in a contact's name and information to customize your email. But unlike a static template, Sales Emails creates unique, personalized output every time.

To use this feature, ensure that **Add Email Prompt Instructions** is enabled.

1. Use Einstein to create emails in Salesforce and in Salesforce email integrations for Outlook and Gmail.
  - In Salesforce, open the email composer anywhere in Lightning Experience.
  - In Gmail or Outlook integrations, locate the Einstein Sales Emails component in the email application pane.
2. Enter a recipient with a contact or lead record in Salesforce.
3. Click **Draft with Einstein**.



4. Enter instructions for Einstein and click **Draft Email**. A proposed draft email appears for you to review.
5. Revise the content or use it to send an email.
6. Revise the draft by altering the email instructions, choosing from pre-made instructions, or selecting from the adjustment choices.

### EDITIONS

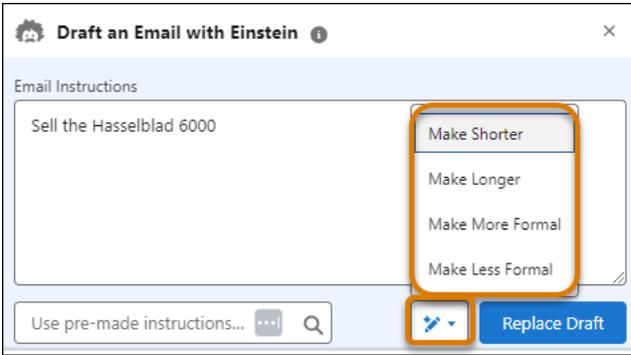
Available in: Lightning Experience

Available with the Einstein for Sales add-on, which is available for an extra cost in **Performance** and **Unlimited** Editions.

### USER PERMISSIONS

To send sales emails using Einstein generative AI:

- Einstein Sales Emails permission set



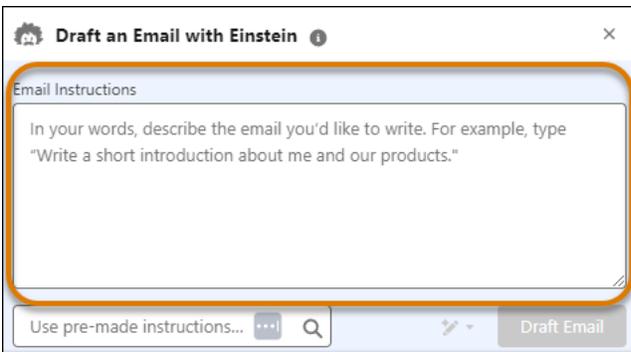
Each time you choose a revision, you get a personalized response.

**Important:** This tool uses generative AI, which is known to include inaccurate or harmful responses. Before sharing externally, review the output for accuracy and safety. You assume responsibility for the output when sharing.

## Control If Users Can Enter Their Own Sales Email Prompt Instructions

Salesforce admins can control if anyone can enter instructions for Einstein to use in creating a unique draft email. This feature is on by default.

1. In Setup, enter *Einstein for Sales* and select **Einstein for Sales**.
2. Disable the setting **Add Email Prompt Instructions**.



No one in your organization can enter their own email instructions for using generative AI to create a draft email. Pre-made instructions are still available.

**Important:** This tool uses generative AI, which is known to include inaccurate or harmful responses. Before sharing externally, review the output for accuracy and safety. You assume responsibility for the output when sharing.

### EDITIONS

Available in: Lightning Experience

Available with the Einstein for Sales add-on, which is available for an extra cost in **Performance** and **Unlimited** Editions.

### USER PERMISSIONS

To enable and disable organization-wide settings

- Customize Application AND Modify All Data

## 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.

### EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: **All** Editions

### General

- You can't use custom currency fields with emails.
- Emails can have only one record type.
- When you send an email using the docked email composer, only a partial page refresh occurs.
- If you enable Compliance BCC Email, each outgoing email is automatically copied to a compliance email address. In this case, your emails don't have a BCC option.
- When you click a custom email field on a standard contact, lead, or person account, the email composer opens with the custom email address in the To: field. However, the email isn't logged against the contact, lead, or person account record.
- You can select email address pills by clicking on them, unless you're using Safari.

### Default Fonts

Everywhere the email composer is used, the default font in your email composer reflects your browser's default. Similarly, email recipients see the email in the default font set for their browser.

To ensure email recipients read text in the same font, use the email composer toolbar and explicitly choose a font for the content they send. This choice overrides the default browser font for the sender and the recipient.

### 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 the email was opened
  - the date when the email 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. You can include files as links, include them as links if they exceed 3 MB, or include them as files if the sent email is less than the Salesforce email size limit.
  - If you select the option to include files as links when the email and attachments exceed 3 MB, or if you use list email, the actual files aren't attached when the email is 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:** An email attachment sent as a link becomes 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.

## Choosing a Default Email Composer

In your personal email settings in Lightning Experience, you can choose which email composer opens when you click an email address.

 **Note:** Before using the personal email setting When you click an email address to compose an email, which email editor do you want to use?, confirm that the Global Publisher Layout has the email action in the **Salesforce Mobile and Lightning Experience Action** section.

- Clicking an email address opens the Salesforce email composer by default.
- When you click a custom email field on a custom object, the default desktop email client opens with the custom email address in the To: field. The desktop email client opens regardless of the user's setting.
- When you click an email address in a report, the default desktop email client opens, regardless of the user's setting.
- You can't open an email composer by clicking email addresses in the List Email home page and the EmailMessage.

## Read-Only Recipient Fields

- In a read-only field, the existing email address can't be deleted and no email addresses can be added.
- If the Cc: or Bcc: fields are disabled and empty, the fields aren't shown in the email composer.

## For Organizations That Use Email to Case

- Email messages that aren't associated with cases can't be displayed in communities.
- 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 can be associated with other records and the `ParentID` field can be blank. To handle email messages with a blank `ParentID` field, update your triggers and workflow rules.

## 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:
  - Recreate any custom Task fields on the Email Message object.
  - Migrate any Task object triggers to the Email Message object.

## Copying and Pasting Tables

Results from copying and pasting tables can differ among browsers.

- When copying tables from Quip, font color and table border styling isn't supported when pasting in the Salesforce email composer. Other styling, such as bold fonts and background color, is preserved.

- We support copying from the native Excel app only. Copying from the online version of Office 365 Excel isn't supported.

SEE ALSO:

[Considerations for Using Email to Salesforce](#)

[File Size and Sharing Limits](#)

## Email Allocations per Edition

See the allocations for email and email templates per edition.

Feature	Personal Edition	Contact Manager	Group Edition	Professional Edition	Enterprise Edition	Unlimited and Performance Edition	Developer Edition
Email services: maximum inbound email messages processed by Salesforce per day				Number of user licenses multiplied by 1,000; maximum 1,000,000			
Email services: maximum size of outbound email message (email headers, body, attachments, and encoding)	N/A			35 MB <sup>1</sup>			
Inbound email sent to Salesforce	<ul style="list-style-type: none"> <li>• Email body truncation size: 32 KB</li> <li>• Maximum email activities created for each email received: 50</li> <li>• Total maximum size of file attachments: 25 MB<sup>1</sup></li> </ul>						
Merge field: <code>Case.Email_Thread</code>	N/A		<ul style="list-style-type: none"> <li>• Maximum emails: 200</li> <li>• Email body truncation size: 32 KB</li> </ul>				
On-Demand Email-to-Case: maximum email messages processed by Salesforce per day (counts toward limit for email services)	N/A			Number of user licenses multiplied by 1,000; maximum 1,000,000			
On-Demand Email-to-Case: maximum email size (email headers, body, attachments, and encoding)	N/A			35 MB <sup>1</sup>			

<sup>1</sup> The maximum size of email messages for email services varies depending on character set and transfer encoding of the body parts. The size of an email message includes the email headers, body, attachments, and encoding. Therefore, an email with a 35-MB attachment probably exceeds the 25-MB limit for an email message after accounting for the headers, body, and encoding. When sending an email from a record, attachments exceeding the size limit are sent as an .html link.

## Single Email Limits

Each licensed org can send single emails to a maximum of 5,000 external email addresses, or recipients, per day. A day is based on Greenwich Mean Time (GMT).

Sending emails to internal email recipients doesn't count toward the org daily limit.

- For orgs created before Spring '19, the org daily limit is enforced only for emails sent via Apex and Salesforce APIs, except for REST API.
- For orgs created in Spring '19 and later, the org daily limit is also enforced for email alerts, simple email actions, Send Email actions in flows, and REST API.
- Each user can send emails from the email composer to a maximum of 250 external email recipients per hour.

In Developer Edition orgs and orgs evaluating Salesforce during a trial period, each user can send emails to a maximum of 50 recipients per day, and each single email can have up to 15 recipients.

SEE ALSO:

[Email Template Allocations Per Edition](#)

[List Email Limitations](#)

## 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:	<ul style="list-style-type: none"> <li>• Lightning Experience enabled.</li> <li>• Send Email action added to the Salesforce Mobile and Lightning Experience Actions section on page layouts for objects that support Lightning Email.</li> </ul>
Send all types of outbound email:	Access to Send Email access level set to <i>All email</i> .
Send attachments:	<ul style="list-style-type: none"> <li>• Content Deliveries enabled to upload files larger than 3 MB. If Content Delivery isn't enabled, users can't upload files larger than 3 MB.</li> <li>• Salesforce Files enabled to send files. If Salesforce Files isn't enabled, you can only send attachments.</li> </ul>
View sent emails:	<ul style="list-style-type: none"> <li>• When Enhanced Email is on: No additional permissions are required. Emails appear as email records.</li> </ul>

### EDITIONS

Available in: Salesforce Lightning Experience

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

Organization Level	Permissions and Access Requirements
	<ul style="list-style-type: none"> <li>When Enhanced Email is off: Emails appear as task records. We recommend enabling Shared Activities.</li> </ul> <p>If Shared Activities isn't enabled and a user sends email to multiple contacts, Salesforce creates duplicate closed task records—one for each contact.</p>

User	Preferences and Permissions Required
Send email:	<ul style="list-style-type: none"> <li>Send Email permission.</li> <li>Before sending email for the first time, all administrators and users must verify their email addresses. Just follow the prompt.</li> </ul>
Add merge fields to a template or email:	Access to the fields on the applicable object.
Attach a file to an email:	Access to the file you're attaching.
Send mass email to contacts, person accounts, or leads in Salesforce Classic:	Mass Email.
Send and view list emails in Lightning Experience:	Allow sending of List Emails.

## SEE ALSO:

[Email Template Permissions](#)

[Which Option for Sending Email from Salesforce Is Best for Your Organization?](#)

## 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.

### [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 Attachments](#)

It's important to understand how access and sharing work for merge fields, email templates, and attachments.

### [Merge Fields and Templates in Emails](#)

Use merge fields and email templates in your emails to increase accuracy and productivity.

### [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.

### EDITIONS

Available in: Lightning Experience

Available in: **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

### [View Email Engagements on Email Records](#)

When navigating to an email details page, sales reps now see the complete list of engagements pertaining to that email.

### [Considerations for Insert Availability in Lightning Experience Desktop](#)

Be aware of these considerations for using Insert Availability in Lightning Experience desktop.

### [Schedule Emails with Send Later](#)

As sales reps send emails to leads and contacts, they can schedule the emails so that they arrive at the most optimal time. Set up Scheduled Emails in Lightning Experience so that reps can update the content of a scheduled email and change its scheduled date and time.

### [Use the Email Action in Lightning Experience](#)

The Lightning Email action allows emails to be sent from anywhere in Salesforce. It 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.

## 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 all objects with activity enabled, such as leads, contacts, person accounts, opportunities, cases, and custom objects.

 **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 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.

When you send an email using the docked email composer, only a partial page refresh occurs.

3. If the To: field is blank, add an email address for a contact, lead, or person account.

 **Note:** Whether the first recipient of an email is a contact, lead, or person account has ramifications. For instance, some merge fields require a certain type of recipient. The validation of the Related To field is also affected by the first recipient's type. For example, a lead can't have a related to entry until it becomes a contact or person account.

4. Write your email, or insert an email template.
5. Add any attachments you want.  
To add multiple attachments from your computer, drag the files into the body of the email.
6. Optionally, click the **Insert Availability** icon to select possible meeting times.
7. Preview and send. Or select **Send Later** to schedule the email so that it arrives at an optimal time.

### 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.

 **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 wants 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.

Find a link to the email in the activity timeline of the current record or related records. If Automatic BCC is defined in your email settings, you receive a copy of the email in the inbox of your specified return address.

SEE ALSO:

[Considerations for Insert Availability in Lightning Experience Desktop](#)

[Schedule Emails with Send Later](#)

## Email Attachments

It's important to understand how access and sharing work for merge fields, email templates, and attachments.

- Enable Salesforce Files and Content Deliveries before you select and attach files from Salesforce Files. Otherwise, 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.
- When you use an email template that has attached files, the files aren't visible after inserting the template in an email.
- Use the Related Files link when adding an attachment. All the files that are part of the record appear.
- 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. You can include files as links, include them as links if they exceed 3 MB, or include them as files if the sent email is less than the Salesforce email size limit.

- If you select the option to include files as links when the email and attachments exceed 3 MB, or if you use list email, the actual files aren't attached when the email is 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:** An email attachment sent as a link becomes publicly accessible. Public access allows anyone with the link to view, share, and download the file.

- Attachments that are sent as links in Lightning Experience don't expire automatically. You can expire the link manually.
- Attachments that are sent as links in Salesforce Classic expire after 30 days. 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.
- A file can be shared a maximum of 2,000 times.

### EDITIONS

Available in: Lightning Experience

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

This count includes how many times the file was shared 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:

[Share Files Via Link](#)

## Merge Fields and Templates in Emails

Use merge fields and email templates in your emails to increase accuracy and productivity.

### Merge Fields

Nearly all standard and custom fields are available as merge fields.

In the email composer, click the merge field button to see the merge field picker. Select a merge field and click **Insert**.

Click the **Template** button and select **Save as new template...** to save your email as an email template you can use in the future.

- Fields about the related record, such as Account, Contact, Opportunity, Lead, Campaign, Case, User, and custom objects
- Fields about the primary recipient, such as the lead, contact, or person account

 **Note:** In Lightning Experience, you can use person account merge fields. Use the HML 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.

 **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 (Salesforce Merge Language) email template. Lightning templates created since Summer '18 are HML email templates.

### Email 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.

- You can edit public email templates that you own. If you have the Manage Public Lightning Email Templates permission, you can edit any public template.

#### EDITIONS

Available in: Lightning Experience

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

## 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 the email's 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.

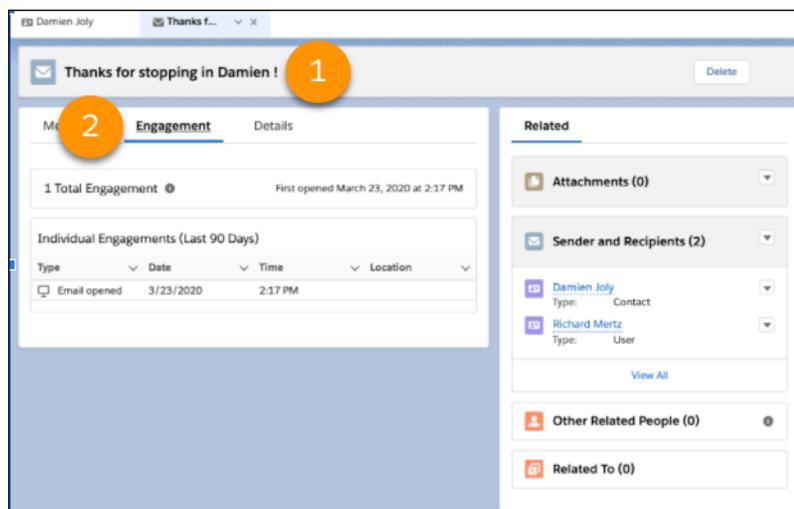
## View Email Engagements on Email Records

When navigating to an email details page, sales reps now see the complete list of engagements pertaining to that email.

Available in: Lightning Experience

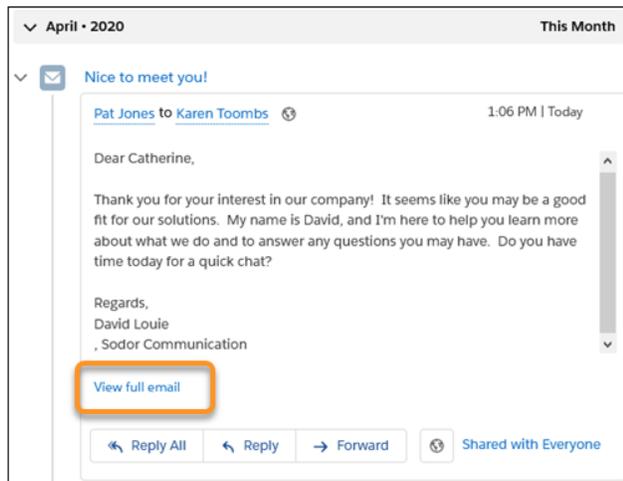
Available with Sales Cloud and included in **Professional, Enterprise, Performance,** and **Unlimited** Editions

For emails that are manually logged to Salesforce, view the full list of email engagement on email records.



Navigate to an email detail page (1). Then on the Engagement tab (2), view all the individual engagements available in this email.

Alert Types	Inbox Only	Inbox + Sales Engagement	Inbox + Sales Engagement + EAC
Opens	✓	✓	✓
Replies	✓	✓	✓
Record assignments		✓	✓
Link clicks			✓
Bounces			✓



On lead, contact, and person account records, when the activity timeline shows email activity, sales reps can access the engagement details for each email. To view the engagements, click **View full email** and then hover over the Last Opened Date or click the email subject. If you use Einstein Activity Capture to log emails automatically, use this method to view the engagement history for an email.

SEE ALSO:

[View Engagement for Specific Emails on Lead, Contact, and Person Account Records](#)

## Considerations for Insert Availability in Lightning Experience Desktop

Be aware of these considerations for using Insert Availability in Lightning Experience desktop.

Available in: Lightning Experience

Available with Sales Cloud and included in **Professional, Enterprise, Performance, and Unlimited** Editions

- Let recipients select any available time on your calendar by inserting a scheduling link.
  - Each link is unique, created when you insert it.
  - You can't copy a link and use it elsewhere.
  - Scheduling links aren't supported in automatic email signatures.

- Links are valid for 90 days.
- When selecting available times, the event owner's calendar is the primary calendar from their connected email account. Events from the connected account's primary calendar, not from the Salesforce calendar or other additional calendars, are reflected on the calendar grid when selecting available times.
- The suggested times that the recipient sees update as the event owner's availability changes. The available times are based only on the event owner's availability. The options available in the email don't live update as other attendees calendars become booked.
- A user's availability is set to 9 AM–5 PM. To change their availability, go to personal settings, find Meeting Settings, and make any changes.
- The default time zone is based on the Salesforce user's time zone, not their computer's time zone.
- If there are multiple attendees, the event time is set when the first recipient selects a free time slot. The invite is then populated on all attendees' calendars.
- If a coworker has shared their calendar with you, you can view their calendar to schedule around their availability. Your coworker doesn't need an Inbox license to share their calendar.
- If a coworker has given you write permissions to their calendar, you can use Insert Availability to schedule meetings on their behalf. Select a different meeting owner in the Insert Availability window. In Outlook, to be available as a meeting owner, the owner of the shared calendar must also be an attendee on the invitation.
- Make sure that recipients are using up-to-date email clients and browsers. If the recipient's email client or browser doesn't support TLS 1.2, they receive an error message when they select an available time in the email.
- The attendee calendar doesn't recognize Google Calendar Out of Office events.
- If Zoom video integration is enabled, connect your Zoom account and select to have a Zoom meeting link automatically added to the generated event invitation.

#### SEE ALSO:

[Considerations for Scheduling Events with Insert Availability in the Outlook and Gmail Integrations with Inbox](#)

## Schedule Emails with Send Later

As sales reps send emails to leads and contacts, they can schedule the emails so that they arrive at the most optimal time. Set up Scheduled Emails in Lightning Experience so that reps can update the content of a scheduled email and change its scheduled date and time.

Available in: Lightning Experience

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Available with Sales Cloud and included in **Professional, Enterprise, Performance,** and **Unlimited** Editions

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### [Set Up Send Later for Your Sales Reps](#)

As sales reps send emails to leads and contacts, they can schedule the emails so that they arrive at the most optimal time. Set up Scheduled Emails in Lightning Experience so that reps can update the content of a scheduled email and change its scheduled date and time.

### [Schedule Send Later with List Email](#)

As sales reps send emails to groups of leads and contacts, they can schedule the list email to arrive at the most optimal time.

### [Things to Know About Using Send Later](#)

Review these considerations about scheduling emails and list emails to be sent later in Lightning Experience.

## Set Up Send Later for Your Sales Reps

As sales reps send emails to leads and contacts, they can schedule the emails so that they arrive at the most optimal time. Set up Scheduled Emails in Lightning Experience so that reps can update the content of a scheduled email and change its scheduled date and time.

Available in: Lightning Experience

Available with Sales Cloud and included in **Professional, Enterprise, Performance, and Unlimited** Editions

Enhanced email must be enabled.

1. Go to an object home page or the Salesforce home page where you want sales reps to manage scheduled emails.
2. Click the gear icon and select **Edit Page**.
3. Add the Send Email Later - Pending List component to the page and save the change.  
The Send Email Later - Pending List component creates a list of scheduled emails that have yet to send.

SEE ALSO:

[Things to Know About Using Send Later](#)

[Lightning App Builder: Create and Configure Lightning Experience Record Pages](#)

[Standard Lightning Page Components](#)

## Schedule Send Later with List Email

As sales reps send emails to groups of leads and contacts, they can schedule the list email to arrive at the most optimal time.

Available in: Lightning Experience

Available with Sales Cloud and included in **Professional, Enterprise, Performance, and Unlimited** Editions

1. To schedule a list email, select **Send Later**.

### USER PERMISSIONS

To send email:

- Send Email permission and access to the record the email is sent from

To schedule an email to send later:

- Use Inbox user permission, available with a Sales Engagement, Sales Cloud Einstein, or Inbox license

OR

Sales Engagement Basic user permission

To edit a page layout:

- Customize Application

### USER PERMISSIONS

To send email:

- Send Email permission and access to the record the email is sent from

To schedule an email to send later:

- Use Inbox user permission, available with a Sales Engagement, Sales Cloud Einstein, or Inbox license

OR

Sales Engagement Basic user permission

Send List Email

Recipients 1 All Contacts ×

Enter Subject...

**Content** Review

Font Size **B** *I* U A 🖼️ ☰ ☰ ☰ 🔗 💬

Dear {{{Recipient.FirstName}}},

We look forward to seeing you at our annual trade show and our accompanying golf tournament.

There's lots of new stuff to see in the booth this year!

See you soon,

{{{Sender.FirstName}}}  
{{{Sender.Email}}}

🗑️ 📧 🔗 Send Later Send Save as Draft

10/10 send limits remaining

- Set a date and time for the list email to be sent.

Choose a date and time

Date  
Jul 17, 2020 📅

Time  
8:00 AM 🕒

Time Zone  
(GMT-7:00) America/Los Angeles ▼

Send Jul 17, 08:00 AM PDT

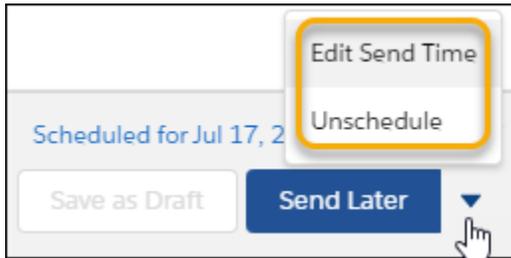
Cancel Save

- Click **Send Later** and the email is scheduled to be sent at that date and time.  
To change the scheduled time, or delete the email, go to the List Emails home page.  
The scheduled date and time appear on the list email.

Scheduled for Jul 17, 2020, 10:00 AM CDT

Save as Draft Send Later ▼

Choose **Edit Send Time** or **Unschedule**.



 **Note:** You can't unschedule an email after its scheduled send time has passed.

## Things to Know About Using Send Later

Review these considerations about scheduling emails and list emails to be sent later in Lightning Experience.

Available in: Lightning Experience

Available with Sales Cloud and included in **Professional, Enterprise, Performance, and Unlimited** Editions

- You can't schedule an email reply.
- You can't schedule an email being sent from an organization-wide email address.
- You can schedule an email for up to two months later.
- Email recipient addresses are saved when an email (or list email) is scheduled. Even if a recipient is deleted from Salesforce, the email is still sent. You can delete scheduled emails from the Scheduled Emails list. Delete scheduled list emails from the List Emails home page.
- If an email is scheduled from a cadence, and the contact is either removed from the cadence or moved to another cadence, the scheduled email isn't sent. The cadence step returns to an active state. The draft email is deleted and no longer appears on the Scheduled Emails component.
- When scheduling an email to send later, use a Classic text email template, a Lightning email template, or an Email Template Builder email template.
- Merge fields are resolved right before an email is sent, not when an email is scheduled. Field values can change after an email is scheduled.
- Emails scheduled in Lightning Experience can be edited before they're sent.
  - The send date and time can be edited regardless of where the email was scheduled.
    - For emails sent to individuals, use the Scheduled Emails list.
    - For list emails, use the List Emails object home.
  - If the email was scheduled from Lightning Experience, you can edit the email content in Lightning Experience.
  - If the email was scheduled in Outlook or Gmail, edit the email content by opening the draft email in those products.
- The actual send time can vary within a few minutes of the scheduled time.
- Send Later creates an email draft as soon as an email is scheduled to be sent later.

- If you're sending email with Einstein Activity Capture, the draft is deleted after the email is sent. The sent email is in your email application's Sent Items folder and streams back on related records in Salesforce.
- If you're sending email with Inbox (email capture off) the email's status is updated from draft to sent.
- When introducing custom logic, such as triggers, that prevents the deletion or update of email message records, ensure that the Send Later function can still delete or update emails.

## SEE ALSO:

[Sales Engagement](#)

[Set Up Send Later for Your Sales Reps](#)

[Organization-Wide Email Addresses](#)

[Types of Classic Email Templates](#)

## Use the Email Action in Lightning Experience

The Lightning Email action allows emails to be sent from anywhere in Salesforce. It 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, Enterprise, Performance, Unlimited,** and **Developer Editions**

### [Which Email Action Are You Using in Lightning Experience?](#)

There are two Lightning Email actions: one for the desktop and one for mobile.

### [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 Additional Email Actions in Lightning Experience](#)

Include the Email action on layouts to make emailing more convenient.

### [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.

### [Create Predefined Field Values for Email Recipients in the Send Email Action](#)

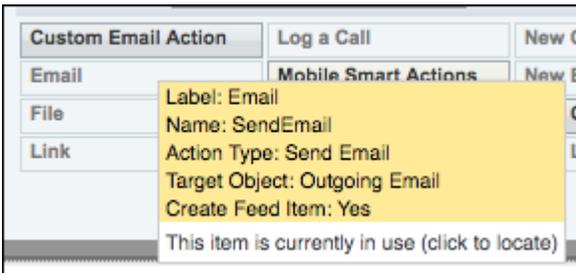
By default, we prepopulate the To: field with a contact or lead email address when you open the email action from the contact or lead record home pages. Extend this behavior to other objects and also predefine the To:, Cc:, or Bcc: fields.

## Which Email Action Are You Using in Lightning Experience?

There are two Lightning Email actions: one for the desktop and one for mobile.

To see which action you're using:

1. Click **Setup**.
2. In the Quick Find box, enter *Global Actions*, then click **Global Actions**.
3. Examine the Email actions.  
The action is labeled Email, with the same name of SendEmail and an action type of Send Email.



-  **Note:** The Email Action for the Salesforce mobile app, EmailHighlightAction, is now called Email (mobile only). It displays on mobile layouts only.



SEE ALSO:

[Troubleshoot the Email Action](#)

## Email Action Considerations

Before working with the Email action, be aware of these limitations.

### General

- Using the Email action, you can send an unlimited number of emails.
- You can't add custom fields or rename existing fields in the Email action.
- The From field is required.

-  **Note:** If the From field isn't in the Email action layout, it must be predefined.

### EDITIONS

Available in: Lightning Experience

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

### EDITIONS

Available in: Lightning Experience and the Salesforce mobile app

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

- HTML Body content is required; Text Body content is only supported on the Case-specific Email action.



**Note:** If the HTML Body field isn't in the Email action layout, it must be predefined.

- The Related To field can't be set to Cases in the global Email action.
- The Reply and Reply-All Email actions can't be executed when the Email Composer tab isn't active.
- The **Send an Email** mobile action isn't 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.
- To predefine the From field, specify one of these email addresses:
  - The user's return email address
  - The email address of the user's connected account
  - An org-wide email address

The predefined value is among the addresses available in the email composer From field when it isn't hidden.

### 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.

### In the Salesforce Mobile App

- In the Salesforce mobile app, click the Email action to choose the email app you want to use to compose and send your email.

Choices include your mobile device's native email and other email providers, such as Inbox, and Gmail or Outlook. Composing an email isn't done directly in the Salesforce mobile app.

## 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.
- The Email Composer tab must be selected in the Feed for the Reply and Reply-All Email actions to work.
- 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 in Lightning Experience?](#)

## 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**

### 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 is in the “Quick Actions 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.

 **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](#)

### 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

## Create Additional Email Actions 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 can 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 isn't supported on cases.

You can't use the global Send Email action with cases, or add the action to the Cases layout. Instead, use an object-specific quick action.

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)

 **Note:** When you create a custom quick action, use a unique label and API name. If the custom quick action has the same API name as a legacy standard action, Metadata API and change set deployment errors can occur. The incorrect action can also appear on page layouts. For example, use the name "SendEmail" instead of only "Email."

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 Quick Action](#)
- [Create a Send Email Quick Action for Cases](#)

### 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

## 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 13: 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	<p>Email header field where sales reps can enter BCC addresses.</p> <p>If <code>BCC Address</code> is added to an email layout that includes the <code>To Address</code> field, the <code>BCC Address</code> field is collapsed and appears as a link in the email layout. When a sales rep clicks the BCC 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.</p> <p>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).</p>
CC	<p>Email header field where sales reps can enter CC addresses.</p> <p>If <code>CC Address</code> is added to an email layout that includes the <code>To Address</code> field, the <code>CC Address</code> 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.</p> <p>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).</p>
From	<p>Email header field where sales reps can enter a From email address from a picklist (dropdown list).</p> <p>Reps can select from org-wide email addresses and the user's own email address.</p> <p>The <code>From</code> 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 <code>From</code> picklist is added to the email layout by default.</p>
HTML Body	Email body field that supports HTML formatting and images.
Related To	<p>Field for the record ID of related objects, such as accounts, opportunities, campaigns, cases, or custom objects.</p> <p>For more information, see <code>EmailMessage</code> in the API Guide.</p>
Subject	Email header field where users can enter a subject.

### EDITIONS

Available in: Lightning Experience

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

Field	Description
To	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 To (used to define email addresses) or To Recipients (used to define contact, lead, and user IDs).

## SEE ALSO:

[Create Additional Email Actions in Lightning Experience](#)

## Create Predefined Field Values for Email Recipients in the Send Email Action

By default, we prepopulate the To: field with a contact or lead email address when you open the email action from the contact or lead record home pages. Extend this behavior to other objects and also predefine the To:, Cc:, or Bcc: fields.

The admin must specify the To recipient, Cc recipient, or Bcc recipient to associate the email with the Salesforce record. The recipient must be a lead, contact, or person account. The predefined fields must be lookup fields.

1. Click Setup. In the Quick Find field, enter *Global Actions*, then click **Global Actions**.
2. Open the Send Email action you want to modify.
3. In the **Predefined Field Values** section, click **New**.
4. For Field Name, select one of the following fields:
  - To Recipients
  - CC Recipients
  - BCC Recipients
5. Use the formula editor to associate your selected field with a Salesforce record using the JUNCTIONIDLIST function.

 **Note:** For values with only one ID, you don't have to use the JUNCTIONIDLIST function.

For example:

- To associate the To Recipients field with the account's primary contact record, enter:  
`JUNCTIONIDLIST(Account__c.Contact__c) OR Account__c.Contact__c`
- To associate the BCC Recipients field with the account's owner and the owner's manager, enter:  
`JUNCTIONIDLIST(Account.ContactId, Account.Owner:User.ManagerId)`

6. Click **Save**.

 **Example:** Let's review an example for defaulting the contact, lead, or person account into the Email Action. You have a custom object called Application with a lookup field to the contact. The API name for Application is Application\_\_c and the API name for the contact field is Contact\_\_c. Since we're getting data from the related record (the contact id), we need an entity-specific email action for Application.

1. In Setup, go to the **Object Manager** tab and click the name of your custom object, Application.
2. Choose **Buttons, Links, and Actions** and click the **New Action** button.

### EDITIONS

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

3. Choose the **Send Email** action type, complete the other fields, and click **Save**.
4. Choose **Buttons, Links, and Actions** and click the name of the action you created.
5. Add a predefined field for To Recipient, with the formula value `Application__c.Contact__c`, and click **Save**.
6. Add the new email action to the page layout.

## 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.

## 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.

### 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.

#### EDITIONS

Available in: Salesforce Classic (**not available in all orgs**)

Available in: **All** Editions except **Essentials**.

Mass email not available in: **Personal, Contact Manager, and Group** Editions

#### EDITIONS

Available in: Salesforce Classic

Available in: **All** Editions except **Essentials**.

## 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 **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 the 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.

1. From Setup, enter *Attachments* in the **Quick Find** box, then select **Delete Attachments Sent as Links**.
2. Enter either of these 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
  - Attachment URL: Click the attachment link (`.html`) in the email to open it in a browser, and copy and paste the URL.
  - Date range during which the email was sent
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** except **Essentials**

### USER PERMISSIONS

To send email:

- Send Email

### EDITIONS

Available in: Salesforce Classic

Available in: **All Editions** except **Essentials**

### 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. 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.

### [Email Security Mechanisms](#)

Salesforce supports several email security mechanisms: Transaction Layer Security (TLS), Sender Policy Framework (SPF), DomainKeys Identified Mail (DKIM), and Domain-based Message Authentication, Reporting, and Conformance (DMARC). Each mechanism protects different aspects of an email message.

### [Email Address Internationalization \(EAI\)](#)

Connect with users across the globe by using non-Latin-based characters in email addresses when sending emails from Salesforce.

### [Verify Email Addresses with Async Email](#)

Send email messages to internal and external users to ensure they're registered with a valid email address that they own. Async email messages contain a verification link (URL). Users simply click the link to verify their email address. After verifying their email address, external users can log in with one-time password (OTP) via email (passwordless login).

### [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 and permission set.

### [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.

### [Inbound Email Snapshots](#)

Take a snapshot of inbound email messages so you can more easily troubleshoot inbound email errors.

### [Email: What's Different or Not Available in the Salesforce Mobile App](#)

Not every Lightning Experience feature is in the Salesforce mobile app. Find out what's different.

### [Using Images in Emails, Email Templates, and Enhanced Letterheads](#)

Images can be used in email, email templates, and enhanced letterheads. Read more to understand the limitations.

### [Enable Email Bounce Handling](#)

With bounce handling, reps know when an email doesn't get delivered to recipients. And they also know which lead, contact, or person account has a bad email address when there's a permanent delivery failure. Review the considerations for the behavior resulting from a soft bounce (a temporary delivery failure), or from a hard bounce (a permanent delivery failure).

### [Email Open Tracking and Email Opt Out](#)

Keeping an eye on if and when customers open your outgoing emails is the best way to know if they're successful. Honor customer requests for different levels of email privacy; some customers don't want any email, while others want to get commercial email only.

### [Email Reports](#)

Use reports to get information on emails and list emails.

#### EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: **All Editions**

## Email Security Mechanisms

Salesforce supports several email security mechanisms: Transaction Layer Security (TLS), Sender Policy Framework (SPF), DomainKeys Identified Mail (DKIM), and Domain-based Message Authentication, Reporting, and Conformance (DMARC). Each mechanism protects different aspects of an email message.

### Set Up Transaction Layer Security (TLS)

Transaction Layer Security (TLS) encrypts the contents of an email transaction during transmission. The sender and receiver can also use it to verify each other's identity. You can choose a TLS setting when sending email through Salesforce or through an email relay.

### Sender Policy Framework (SPF)

The Sender Policy Framework (SPF) email authentication method aims to reduce spam and fraud by making it harder for email senders to hide their identity. SPF detects email spoofing by providing a process to verify who is permitted to send emails on your behalf. SPF improves message deliverability, protects the credibility and reputation of your domains, and enhances user trust and confidence. Salesforce uses SPF and recommends that you do, too.

### Set Up Secure DKIM Keys

Use the DKIM (DomainKeys Identified Mail) key feature to let Salesforce sign outbound email sent on your company's behalf. These signatures give recipients confidence that the email was handled in a way that's consistent with your company.

### What Is DMARC?

Domain-based Message Authentication, Reporting, and Conformance (DMARC) is an email authentication, policy, and reporting protocol. It's built on top of Sender Policy Framework (SPF) and DomainKeys Identified Mail (DKIM) protocols. If neither of those authentication methods passes, the DMARC policy determines what to do with the message. Salesforce supports and recommends DMARC. It's up to you to determine whether you implement it for your domain.

## Set Up Transaction Layer Security (TLS)

Transaction Layer Security (TLS) encrypts the contents of an email transaction during transmission. The sender and receiver can also use it to verify each other's identity. You can choose a TLS setting when sending email through Salesforce or through an email relay.

 **Note:** Salesforce no longer supports TLS versions 1.1 or 1.0. If the receiving mail server only supports TLS 1.1 or 1.0 ciphers, then the email is sent unencrypted unless the sending org has specified that TLS is required.

1. From Setup, enter *Deliverability* in the Quick Find box, and then select **Deliverability**.
2. In the Transport Layer Security (TLS) (Emails from Salesforce or Email Relay Only) section, select your TLS Setting:
  - **Preferred**—If the message transfer agent (MTA) advertises TLS and a common cipher can be negotiated, TLS is used. If TLS can't be negotiated, the email is delivered unencrypted. This setting is the default.
  - **Required**—If TLS can't be negotiated or a common cipher can't be agreed on, the email bounces back to the originator.
  - **Preferred Verify**—If the MTA advertises TLS, a common cipher can be negotiated, and Salesforce can verify the receiver, TLS is used. Verification means that a valid certificate authority has signed the receiver's certificate and the hostname in the certificate matches the host to which we connected. If TLS can't be negotiated or the verification fails, the email is delivered unencrypted.

### EDITIONS

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

Available in: all editions except **Database.com**

### EDITIONS

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

Available in: all editions except **Database.com**

### USER PERMISSIONS

To configure email deliverability:

- Customize Application

- **Required Verify**—If TLS can't be negotiated, a common cipher can't be agreed on, or the sender can't be verified, the email bounces back to the originator. Verification means that a valid certificate authority has signed the receiver's certificate and the hostname in the certificate matches the host to which we connected.
3. Optionally, if you selected a setting other than Preferred, you can select **Restrict TLS to these domains** and enter the comma-separated list of domains. When delivering to domains that aren't listed, we use the "Preferred" setting.
  4. Click **Save**.

## Sender Policy Framework (SPF)

The Sender Policy Framework (SPF) email authentication method aims to reduce spam and fraud by making it harder for email senders to hide their identity. SPF detects email spoofing by providing a process to verify who is permitted to send emails on your behalf. SPF improves message deliverability, protects the credibility and reputation of your domains, and enhances user trust and confidence. Salesforce uses SPF and recommends that you do, too.

Email messages contain two "from" addresses: the header from address and the envelope from address. The header from address is in the "From:" field of an email and is visible to all users. The envelope from address indicates which address to return, or bounce, the message back to.

Some spam detection software looks at the envelope from address to see if it matches any sites known to send spam. To avoid this type of detection, spammers often use a false envelope from address.

Email providers use SPF checks to verify that the sender has the authority to send on behalf of the envelope from address. The SPF check looks up the domain name listed in the envelope from address and compares its SPF record to the IP address sending the email. If the SPF record includes the sending IP, the message passes SPF authentication. If it does not, the email can be flagged as spam.

Salesforce has an SPF record that allows receiving message transfer agents (MTAs) to validate that the sending MTAs are authorized to send email from the Salesforce domain. Salesforce encourages customers to implement SPF to ensure that email sent from the Salesforce application doesn't appear to be spoofed.

There are two ways that you can implement SPF for email sent from Salesforce: enabling Email Security Compliance or including Salesforce in your SPF record.

### [Enable Email Security Compliance](#)

Email Security Compliance updates the envelope from address in emails sent from Salesforce. With this feature enabled, the email header from address is your email address, but the envelope from address is `*.bnc.salesforce.com`. Salesforce's Sender Policy Framework (SPF) record authorizes the IPs used by our message transfer agents (MTAs) to send email from our domain. Email sent from Salesforce passes SPF checks even if you don't have an SPF record for your email domain.

### [Include Salesforce in Your SPF Record](#)

If you don't enable Email Security Compliance, we recommend that you set up a Sender Policy Framework (SPF) record for your email domain. To pass SPF checks, include Salesforce in that record.

## EDITIONS

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

Available in: all editions except **Database.com**

## Enable Email Security Compliance

Email Security Compliance updates the envelope from address in emails sent from Salesforce. With this feature enabled, the email header from address is your email address, but the envelope from address is `*.bnc.salesforce.com`. Salesforce's Sender Policy Framework (SPF) record authorizes the IPs used by our message transfer agents (MTAs) to send email from our domain. Email sent from Salesforce passes SPF checks even if you don't have an SPF record for your email domain.

1. From Setup, enter *Deliverability* in the Quick Find box, and then select **Deliverability**.
2. In the Email Security Compliance (Emails from Salesforce or Email Relay Only) section, select **Enable compliance with standard email security mechanisms**.
3. Optionally, select **Enable Sender ID compliance** to have receiving mail servers use the Sender ID email authentication protocol to verify the sender. This setting also populates the Sender field in the envelope of every email you send from Salesforce with `no-reply@salesforce.com`. If you enable this option, the recipient's email client may append the phrase "Sent on behalf of" to the "From:" field of emails received from Salesforce.

 **Note:** If your Salesforce org was created in Summer '24 or later, you can't enable Sender ID compliance in Email Deliverability settings. Most recipients don't use Sender ID anymore. Unless you know that the recipient of your email requires Sender ID, we don't recommend that you enable this feature. See [Microsoft Exchange's article on Sender ID](#) for more information.

4. Click **Save**.

## Include Salesforce in Your SPF Record

If you don't enable Email Security Compliance, we recommend that you set up a Sender Policy Framework (SPF) record for your email domain. To pass SPF checks, include Salesforce in that record.

1. If you don't already have one, create an SPF record. There are many online resources available if you need assistance with setting up your SPF record.
2. Include `_spf.salesforce.com` in your SPF record when sending mail from the Salesforce application.

 **Note:** Only use `_spf.salesforce.com`. Other SPF records for the `salesforce.com` domain aren't relevant to sending mail from the Salesforce application.

Example SPF records:

- `v=spf1 mx include:_spf.salesforce.com ~all`
- `v=spf1 mx ip4:204.14.234.64/28 ip4:204.14.232.64/28 ip4:182.50.78.64/28 ip4:96.43.144.64/31 ip4:96.43.148.64/31 include:_spf.salesforce.com ~all`

SEE ALSO:

[Knowledge Article: Sender Policy Framework and Salesforce SPF Records](#)

### EDITIONS

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

Available in: all editions except **Database.com**

### USER PERMISSIONS

To configure email deliverability:

- [Customize Application](#)

### EDITIONS

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

Available in: all editions except **Database.com**

## Set Up Secure DKIM Keys

Use the DKIM (DomainKeys Identified Mail) key feature to let Salesforce sign outbound email sent on your company's behalf. These signatures give recipients confidence that the email was handled in a way that's consistent with your company.

### Considerations for Creating DKIM Keys

Before creating DomainKey Identified Mail (DKIM) keys, review the considerations and behaviors.

#### Create a DKIM Key

You can implement several layers of security when delivering emails to your recipients. One option is to use the DKIM (DomainKeys Identified Mail) protocol. To ensure that emails aren't altered during transport, DKIM uses asymmetric cryptography keys to digitally sign your sent emails.

## Considerations for Creating DKIM Keys

Before creating DomainKey Identified Mail (DKIM) keys, review the considerations and behaviors.

### DKIM Rotation

For security purposes, Salesforce rotates your DKIM keys every 30 days. The rotation cycle begins when a DKIM key pair has been created and published.

A DKIM key pair contains a public key and a private key.

- Primary DKIM Key: Your main, active public-private DKIM key pair.
- Alternate DKIM Key: Your secondary, inactive public-private key pair, used to replace the primary key pair during rotation.

### Rotation Timeline

Here's the timeline of events starting the first time a DKIM key is published.

- Day 0: The primary DKIM key pair is published.
- Day 25: Salesforce creates an alternate DKIM key pair in preparation for rotation. Salesforce publishes the alternate key pair to DNS, 5 days before rotation, so that all DNS servers know of the new key pair.
- Day 30: Salesforce marks the alternate key pair as active and signs emails with the newly active key for the next 30 days.

### Multiple DKIM Key Pairs

If multiple active DKIM keys match the sending domain, the key with the longest domain name applies. If the domain names for the keys are the same length, the most specific key applies.

Example: Your emails from Salesforce are sent from mail.example.com. If DKIM key pairs exist for these four domains, Salesforce uses the keys in this order.

- \*.mail.example.com
- .mail.example.com
- \*.example.com
- \*.com

If multiple active keys have the same longest-matching pattern, Salesforce randomly selects one of the keys to use.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: all editions except **Database.com** and **Starter**

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: all editions except **Database.com** and **Starter**

## Create a DKIM Key

You can implement several layers of security when delivering emails to your recipients. One option is to use the DKIM (DomainKeys Identified Mail) protocol. To ensure that emails aren't altered during transport, DKIM uses asymmetric cryptography keys to digitally sign your sent emails.

Each DKIM key pair consists of one private and one public key. Salesforce publishes the public key, and the private keys are stored in Salesforce. They're linked together and work to increase the deliverability of your email.

When Salesforce uses DKIM key pairs to sign outbound email sent on your company's behalf, you increase your domain's reputation as a legitimate sender.

During mail transport, Salesforce uses your private key to generate a DKIM signature and then adds that signature to outbound emails. When the recipient receives the email, the DKIM signature is validated against the public key via your domain's public DNS record. This validation proves that the sender is who they claim to be.

1. From Setup, enter *DKIM Keys* in the Quick Find box, and then select **DKIM Keys**.
2. Click **Create New Key**.  
The new DKIM key pair defaults to the Inactive state.
3. Select the RSA key size. Consider email recipient limitations and industry-specific security regulations when choosing the key size.
4. For Selector, enter a unique name to identify the key name.
5. For Alternate Selector, enter a unique name. The alternate selector allows Salesforce to auto-rotate your keys.
6. Enter the domain name used to send emails for your Salesforce org.  
The domain name used applies to the DKIM key. After you create a DKIM key and specify a domain name, you can't edit the domain name.
7. For domain match pattern, enter a comma-separated list of domain patterns that the domain name must match before Salesforce signs an email with this DKIM key.
  - *Example.com* - DomainOnly: Sign if sending domain matches at the domain level only (*example.com*, but not *mail.example.com*).
  - *\*.example.com* - SubdomainsOnly: Sign if sending domain matches at the subdomain level only (*mail.example.com*, but not *example.com*).
  - *example.com, \*.example.com* - DomainAndSubdomains: Sign if sending domain matches at the domain and subdomain levels (*example.com* and *mail.example.com*).
8. Save your changes. Salesforce publishes your TXT records for this DKIM key to your domain's DNS record.
9. Before activating this key, add the CNAME and Alternate CNAME records from your DKIM Key Details page to your domain's DNS record.  
When the DNS publication is complete, your CNAME and alternate CNAME records appear on the DKIM Key Details page. It can take time for DNS publication to finish around the world.
10. On the DKIM Key Details page, click **Activate**.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: all editions except **Database.com** and **Starter**

### USER PERMISSIONS

Manage DKIM keys:

- Customize Application

You can't activate your DKIM key until your CNAME records are published to your domain's DNS record. For security purposes, Salesforce rotates your DKIM keys every 30 days. When you activate your DKIM key, Salesforce creates a secondary, inactive DKIM key for the next rotation.

SEE ALSO:

[Improve Deliverability of Emails Sent from Salesforce](#)

[Enabling Compliance BCC Emails](#)

## What Is DMARC?

Domain-based Message Authentication, Reporting, and Conformance (DMARC) is an email authentication, policy, and reporting protocol. It's built on top of Sender Policy Framework (SPF) and DomainKeys Identified Mail (DKIM) protocols. If neither of those authentication methods passes, the DMARC policy determines what to do with the message. Salesforce supports and recommends DMARC. It's up to you to determine whether you implement it for your domain.

DKIM and SPF help recipients to verify the authenticity of email messages. But many email environments are complex, sending email from many different systems, including third-party providers. Also, systems and third-party providers can change over time. This complexity and variability can make authenticating every legitimate email message through DKIM or SPF challenging.

For example, what if a domain owner sends emails that can't be authenticated along with others that can? Do you reject all of them in case some are fraudulent? Or, do you accept them all and risk letting spam through to your users? That's where DMARC comes in.

DMARC is a second layer of authentication after DKIM and SPF. If an email doesn't pass DKIM and SPF authentication, DMARC policy tells the receiver what to do with the message. For example, it can reject some email messages and quarantine others.

DMARC also helps senders and receivers collaborate to improve the sender's email authentication methods and the receiver's identification of unauthorized messages. With DMARC, the receiver can report back to the sender when emails fail their DKIM and SPF checks, even if the messages aren't rejected. This information helps senders determine how many legitimate messages can't be authenticated. Senders can then work with receivers to authenticate similar messages in the future. These reports can also inform senders of the scope of fraudulent emails spoofing their domain. Senders and receivers can then change their joint approach to handling emails from that domain based on this information.

Salesforce supports and recommends DMARC. It's up to you whether you implement it for your domain.

SEE ALSO:

[DMARC.org](#)

## Email Address Internationalization (EAI)

Connect with users across the globe by using non-Latin-based characters in email addresses when sending emails from Salesforce.

 **Note:** EAI requires API version 49.0 or later.

[Email Address Internationalization \(EAI\) Considerations](#)

Understand the impact of Email Address Internationalization (EAI) on email address length and the number of allowed recipients per email. Review support limitations, best practices, and the changes to the character encoding returned through the API for email fields.

### EDITIONS

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

Available in: all editions except **Database.com**

### EDITIONS

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

Available in: **All** editions

### [Prepare for Email Address Internationalization \(EAI\)](#)

Take these steps before activating Email Address Internationalization (EAI). Ensure that UTF-8 support exists throughout the email's path, update your integrations to support Unicode characters, and adopt the latest API version. We also recommend that custom fields storing email addresses are of the Email field type.

### [Set Up Email Address Internationalization \(EAI\)](#)

Email Address Internationalization (EAI) allows non-Latin-based characters in email addresses when sending emails to and from Salesforce. You can choose whether emails containing a mix of American Standard Code for Information Interchange (ASCII) and international email addresses are sent as separate or single emails.

## Email Address Internationalization (EAI) Considerations

Understand the impact of Email Address Internationalization (EAI) on email address length and the number of allowed recipients per email. Review support limitations, best practices, and the changes to the character encoding returned through the API for email fields.

### EDITIONS

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

Available in: **All** editions

### Support Limitations

EAI email addresses aren't supported for Marketing Cloud, Marketing Cloud Account Engagement (Pardot), Einstein Activity Capture, or Salesforce Inbox. Our Account Engagement email address validation vendor currently supports only ASCII characters. So you can't add, update, or sync a prospect with non-Latin-based characters in their email address in Account Engagement. If emails with EAI recipients are included in the Account Engagement send pipeline, those recipients are dropped from the communication.

### Only Use ASCII Email Addresses in the Email From Field

If a receiving Email Service Provider (ESP) or Mail Transfer Agent (MTA) doesn't support internationalized email, emails sent from an EAI email address bounce. And the emails bounce even if all the recipients are American Standard Code for Information Interchange (ASCII) email addresses. Until all ESPs and MTAs support EAI, we recommend that you use only ASCII email addresses for your "from" addresses when sending email from Salesforce. The "from" email address is typically populated from the user account's email field or an organization-wide email address.

### Email Address Length and Storage

Non-Latin-based characters are often wider, requiring extra field space and storage. We support non-Latin-based characters in email addresses up to the current 80-character maximum.



**Note:** Encrypting email can reduce the number of characters allowed per email address by as much as a third.

### Number of Recipients Per Email

An EAI email address takes three times more storage on average than an ASCII email address. We addressed the storage per email address, but the TO, CC, and BCC fields on an individual email each still allow up to 4,000 bytes. So using EAI email addresses can reduce the maximum number of recipients per email by as much as a factor of three.

### Mixed Address Handling

To maximize the delivery rate for your emails, Salesforce provides options on how to handle emails containing ASCII and EAI email recipient addresses. The default option is to split the email into two emails. We recommend this option because it gives the message the best chance of delivery.

**OPTION****BEHAVIOR**

Split

- Delivery to the ASCII email address recipients succeeds.
- International emails are delivered successfully as long as the recipient's ESP and MTA supports EAI.
- For recipients with an ASCII email address, the "Reply All" action only sends a response to recipients with ASCII email addresses.
- For recipients with an EAI email address, the "Reply All" action sends a response to all email recipients. If any receiving mail service doesn't support EAI, the email bounces.
- If only EAI addresses exist in the TO field, that field can be blank in the split messages. For example, you send an email with only EAI addresses in the TO field and ASCII and EAI addresses in the CC field. When this message is split, the TO field in the split email with only ASCII addresses is blank. Although a blank TO recipient list can look odd in your email client, email standards allow it.

If you choose to send email from Salesforce using an EAI email address, selecting this option has no effect. A single email is sent because of the EAI email address in the from field.

Allow

- Delivery is only successful to recipients whose ESPs and MTAs support internationalized emails.
- The "Reply All" action sends a response to all email recipients.

**Storage and Display Encoding**

With EAI disabled, the data in fields of type email are all stored with ASCII or ASCII Compatible Encoding (ACE) encoding.

<b>INPUT</b>	<b>DISPLAY</b>	<b>STORAGE</b>	<b>API TYPE RETURNED</b>
ASCII	ASCII	ASCII	ASCII
ACE	ACE	ACE	ACE
Unicode (IDN)	ACE	ACE	ACE
Unicode (EAI)	Invalid email error	N/A	N/A

When you enable EAI, the encoding of the data in email fields changes. Most notably, Unicode (IDN) formatted email addresses entered or updated after EAI is enabled are stored in Unicode format. Unicode (IDN) formatted email addresses stored in email fields before EAI is enabled retain the original encoding type (ACE).

<b>INPUT</b>	<b>DISPLAY</b>	<b>STORAGE</b>	<b>API TYPE RETURNED</b>
ASCII	ASCII	ASCII	ASCII
ACE	ACE	ACE	ACE
Unicode (IDN), entered before EAI is enabled	ACE	ACE	ACE
Unicode (IDN), entered or edited after EAI is enabled	Unicode	Unicode	Unicode

INPUT	DISPLAY	STORAGE	API TYPE RETURNED
Unicode (IDN with combining characters)	ACE	ACE	ACE
Unicode (EAI)	Unicode	Unicode	Unicode
Unicode (EAI with combining characters)	Unicode@ACE	Unicode@ACE	Unicode@ACE

**SEE ALSO:**

[Prepare for Email Address Internationalization \(EAI\)](#)

[Organization-Wide Email Addresses](#)

## Prepare for Email Address Internationalization (EAI)

Take these steps before activating Email Address Internationalization (EAI). Ensure that UTF-8 support exists throughout the email's path, update your integrations to support Unicode characters, and adopt the latest API version. We also recommend that custom fields storing email addresses are of the Email field type.

### Ensure That UTF-8 Support Exists Throughout the Email's Path

Salesforce's EAI support lets you send emails from Salesforce using EAI email addresses. It's only one part of the email's journey, though. Activated email relays must also support UTF-8 encoding, and the recipient must be able to accept emails from UTF-8 encoded email addresses.

To receive emails from UTF-8 encoded email addresses, your Email Service Provider (ESP) must support UTF-8 encoding. A relatively small percentage of ESPs provides UTF-8 support for email addresses. If you wish to receive emails from EAI email addresses, make sure that your ESP provides the required support before enabling EAI.

Likewise, if you set up your Salesforce email to go through an email relay or send through Gmail or Office 365, those relay providers must also support UTF-8 if you want to send emails through them to EAI email addresses.

If your email service provider or relay provider doesn't support UTF-8, you can only send emails to and receive emails from non-EAI email addresses.

### Update Your Integrations to Support Unicode Characters

As part of the support for EAI, email addresses are stored and displayed using Unicode characters. Ensure that your integrations can pass and receive UTF-8 encoded characters. When EAI support is available, API queries can return UTF-8 data, regardless of your API version.

### Adopt the Latest API Version

EAI requires API version 49.0 or later.

#### EDITIONS

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

Available in: **All** editions

## Ensure That All Fields Storing Email Addresses Have the Email Type

If you're storing email addresses in a custom field with a type other than email, change the field type to Email. The Email type applies required validation rules and ensures proper storage space for the corresponding data.

SEE ALSO:

- [Email Address Internationalization \(EAI\) Considerations](#)
- [Send Email Through Email Relay](#)
- [Send Through Gmail or Office 365](#)

## Set Up Email Address Internationalization (EAI)

Email Address Internationalization (EAI) allows non-Latin-based characters in email addresses when sending emails to and from Salesforce. You can choose whether emails containing a mix of American Standard Code for Information Interchange (ASCII) and international email addresses are sent as separate or single emails.

Before enabling EAI, review the considerations and prepare your Salesforce org for the feature.

 **Note:** Orgs created in Summer '20 or later have EAI enabled by default.

1. From Setup, in the QuickFind box, enter *Email Address Internationalization*, and then select **Email Address Internationalization**.
2. Select **Allow international email addresses**.
3. Select your Mixed Recipient Addresses setting.
  - **Split**—Emails sent from Salesforce containing ASCII and EAI email addresses in the TO, CC, and BCC fields are split into two email messages. Delivery to the ASCII email address recipients succeeds. International emails are delivered successfully as long as the recipient's Email Service Provider (ESP) and Mail Transfer Agent (MTA) support EAI. This setting is the default.

 **Important:** If you choose to send email from Salesforce using an EAI email address, selecting this option has no effect. A single email is sent because of the EAI email address in the from field.

- **Allow**—Emails sent from Salesforce containing ASCII and EAI email addresses in the TO, CC, and BCC fields are sent as a single email. Delivery is only successful for recipients whose mail servers support internationalized emails.

For more information on mixed address handling, see [Email Address Internationalization \(EAI\) Considerations](#).

4. Save your changes.

SEE ALSO:

- [Email Address Internationalization \(EAI\) Considerations](#)
- [Prepare for Email Address Internationalization \(EAI\)](#)

### EDITIONS

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

Available in: **All** editions

### USER PERMISSIONS

To configure Email Address Internationalization:

- [Customize Application AND View Setup AND Email Administration](#)

## Verify Email Addresses with Async Email

Send email messages to internal and external users to ensure they're registered with a valid email address that they own. Async email messages contain a verification link (URL). Users simply click the link to verify their email address. After verifying their email address, external users can log in with one-time password (OTP) via email (passwordless login).

1. Use the Apex method `asyncEmailConfirmation` to send a verification link in an email message.

Here's an example.

```
System.UserManagement.sendAsyncEmailConfirmation('005RM000001a00x', '00XRM000000hxnG',
'0DBRM000000015i', '/s/contactsupport');
```

2. Optional. Customize the async email template.
  - a. From Setup, enter *Email Templates* in the Quick Find box, and then select **Classic Email Templates**.
  - b. Next to Communities: User Verification Email, click **Edit**.
  - c. To personalize your email content, edit the text in the email body. Use the available merge fields listed at the top of the page. To find verification-specific fields, select **Network Member Fields** as the field type.
3. Optional. For more flexibility, create a custom async email message that includes a verification link. To insert a verification link, use the `$Network AsyncVerificationLink` field.
4. Optional. Create a list view that tracks certain verification fields, such as whether users have verified their email addresses and phone numbers.
  - a. From Setup, enter *Users* in the Quick Find box, and then select **Users**.
  - b. Click **Create New View** and select these verification-specific fields.
    - Admin Trusted Mobile Number
    - One-Time Password App
    - Salesforce Authenticator
    - Temporary Code
    - U2F Security Key

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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

### USER PERMISSIONS

To configure email deliverability:

- Customize Application

To create, customize, or publish a community:

- Create and Set Up Communities AND View Setup and Configuration

- User Verified Email
- User Verified Mobile Number

## 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 and permission set.

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.

Also you can set up a special purpose organization-wide email address for Salesforce to use when no reply is expected. Users can't select this email address. It's set up to be used by certain features.

 **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
```

### EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: **All Editions**

### [Considerations for Using Organization-Wide Email Addresses](#)

Before creating organization-wide addresses and assigning them to your Salesforce user profiles, review a few details, including information about mass emails and reporting.

### [Set Up Organization-Wide Email Addresses](#)

You can define and manage organization-wide addresses for each permission set or user profile. When sending email from Salesforce, users with these permission sets or profiles can select their own address or the organization-wide address for the email's `From` address. Replies are delivered to the selected address.

SEE ALSO:

[Send Email Through Salesforce](#)

[Organization-Wide Email Footers](#)

## Considerations for Using Organization-Wide Email Addresses

Before creating organization-wide addresses and assigning them to your Salesforce user profiles, review a few details, including information about mass emails and reporting.

Available in: Lightning Experience and Salesforce Classic

Available in: all editions

- You can't use organization-wide addresses in these instances:
  - Scheduled reports
  - Scheduled 1:1 emails
  - Scheduling dashboards for refresh
  - Sending mail merge emails, mass emails, and meeting requests to contacts and leads
- You can't delete or change an organization-wide email address when it's used by an email alert.
- You can create an org-wide email address specifically for No-Reply emails or use an existing org-wide email address as the default No-Reply address. You can have only one verified No-Reply org-wide email address at a time. After a No-Reply address is created, you can't delete it.
- You can use organization-wide addresses when using Outlook and Gmail integration. If a user's connected account or sender email address is the same as the org-wide email address, the org-wide email address takes precedence in the **FROM:** dropdown. The connected account or sender email addresses aren't available.
- The org-wide verified email address is used as the **FROM** address in emails sent from the guest user record, such as emails sent from some custom flows. Outgoing emails are blocked when they're sent from an unverified address in the guest user record.
- You can't see the Reply, Reply All, and Forward standard quick actions on an Email.Message record if the sender's email address is an organization-wide address that isn't set for User Selection and Default No-Reply Address. Manage this setting in Organization-Wide Addresses in Setup.
- You can't use an email service address for new organization-wide email addresses. Existing organization-wide address with email service addresses continue to work. Examples of an email service address include an Email-to-Case address, an Email to Salesforce address, or the address associated with the Apex email service.
- An admin can create an org-wide No-Reply address or use an existing address without requiring verification. Each time a new org-wide email address is verified, it replaces the previously verified one.



**Note:** An admin verifies a new org-wide email address by clicking the link in the email sent after creating the address.

SEE ALSO:

[Organization-Wide Email Addresses](#)

[Set Up Organization-Wide Email Addresses](#)

## Set Up Organization-Wide Email Addresses

You can define and manage organization-wide addresses for each permission set or user profile. When sending email from Salesforce, users with these permission sets or profiles can select their own address or the organization-wide address for the email's From address. Replies are delivered to the 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, in the Quick Find box, enter *Organization-Wide Addresses*, and then select **Organization-Wide Addresses**.
2. Click **Add**.
3. Enter your organization-wide email address's information.
4. Select the **Purpose**.
5. Select the profiles that can send email using this address. Or, select **Allow All Profiles to Use this From Address** to let all users, including guest and unavailable profiles, use the selected organization-wide email address.
6. Click **Save**.
7. To select the permission sets that can send email using this address, from Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**.
8. Click the permission set's name, and then select **Organization-Wide Email Address Access**.
9. Click **Edit**.
10. Add the addresses to the **Enabled Organization-Wide Email Addresses section**. Click **Save**.  
Back on the organization-wide email address's page, you can see a list of the enabled permission sets.

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](#)
- [Create Permission Sets](#)

## 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.

#### [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 Through Salesforce](#)

#### 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.

- Footers are text only. HTML tags aren't rendered.
- 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](#)

## 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](#)
- [Considerations for Setting Up Organization-Wide Email Footers](#)

## Inbound Email Snapshots

Take a snapshot of inbound email messages so you can more easily troubleshoot inbound email errors.

### [What Are Inbound Email Snapshots?](#)

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.

### [Considerations for Using Inbound Email Snapshots](#)

Consider these tips when using inbound email snapshots.

### [Request an Inbound Email Snapshot](#)

Request a snapshot so you can troubleshoot inbound email issues.

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **All Editions**

### EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **All Editions**

### USER PERMISSIONS

To create and edit email footers:

- [Modify All Data](#)

### EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: **All Editions** except for **Database.com**

[Access Inbound Email Snapshots](#)

Access your snapshots to troubleshoot inbound email issues.

[View an Inbound Email Snapshot](#)

Download and view snapshots to troubleshoot inbound email errors.

## SEE ALSO:

[Use Email Logs to Monitor Emails Sent from Salesforce](#)

## What Are Inbound Email Snapshots?

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. 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.

## SEE ALSO:

[Considerations for Using Inbound Email Snapshots](#)

[Request an Inbound Email Snapshot](#)

[Access Inbound Email Snapshots](#)

[View an Inbound Email Snapshot](#)

## Considerations for Using Inbound Email Snapshots

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*.
  - Look up the addresses your organization uses. This table summarizes where to find them.

### Type of inbound email address

The user's unique Email to Salesforce address

### Where to find addresses

From the user's personal settings, enter *Email to 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**

### EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: **All Editions** except for **Database.com**

Type of inbound email address	Where to find addresses
	<b>to Salesforce</b> 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 <b>Email-to-Case</b> 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 <b>Email Services</b> , then the name of an email service.

- Unless you enter a full email address, use an asterisk (\*) wildcard in the local-part of the email address (the part before the @ symbol) or the domain-part (the part after the @ symbol), or both. 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.

## Request an Inbound Email Snapshot

Request a snapshot so you can troubleshoot inbound email issues.

1. To enable inbound email snapshots, contact Salesforce.
2. From Setup, enter *Email Snapshots* in the Quick Find box, then select **Email Snapshots**.
3. 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.

### 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

## Access Inbound Email Snapshots

Access your snapshots to troubleshoot inbound email issues.

1. To enable inbound email snapshots, contact Salesforce.
2. To access inbound email, from Setup, enter *Email Snapshots* in the Quick Find box, then select **Email Snapshots**.

## View an Inbound Email Snapshot

Download and view snapshots to troubleshoot inbound email errors.

1. To enable inbound email snapshots, contact Salesforce.
2. From Setup, enter *Email Snapshots* in the Quick Find box, then select **Email Snapshots**.
3. To view a completed snapshot:

Option	Description
View snapshot details	Click <b>Show Details</b> to see when the snapshot was taken, the sender's address, and the inbound email service address. Click <b>Hide Details</b> to collapse the details section.
Download the snapshot	Click <b>Download</b> then either open the email as a .txt file or save it to your computer.

## Email: What's Different or Not Available in the Salesforce Mobile App

Not every Lightning Experience feature is in the Salesforce mobile app. Find out what's different.

- The app doesn't display emails in the improved layout that's available in Lightning Experience.
- Inbox isn't available.
- List email isn't available. However, users can see completed list email activities in the Activity History related list.
- Salesforce email templates can't be used in the Salesforce Mobile App.

### 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

### 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

## Using Images in Emails, Email Templates, and Enhanced Letterheads

Images can be used in email, email templates, and enhanced letterheads. Read more to understand the limitations.

- The maximum size for an inline image is 5 MB.
- Some image extensions, such as .SVG, don't always have full support in email clients.
- You can insert .SVG images into an email composer using a URL. However, Gmail doesn't send those images with your email.
- Inline images in templates aren't supported when creating and saving templates from the Outlook and Gmail integrations.
- You can add images to an email, email template, or enhanced letterhead by clicking the **Source** icon and including an image reference in the HTML.
- When you save an email template, any content document links (Salesforce file links) are converted to content asset links.
- If an email template's HTML contains an image:
  - The <html> tag is stripped out.
  - A <body> tag with no attributes is stripped out. Body tags with attributes like <body style="color: maroon;" class="whatever"> aren't impacted.

Pasting and dragging images follows these rules:

- – The limit for pasted images is 1 MB in the CKEditor.
  -  **Note:** Beginning with Summer '24, Service Email will no longer support the CKEditor.
  - When you drag or paste an image to the Lightning Editor composer and the image is 5 MB or smaller, the image is inserted as an inline image at the cursor. In all other cases, files are added to an email as attachments, including multiple image files, files greater than 5 MB, and files other than images.

SEE ALSO:

[Send and Receive Emails with Email-to-Case](#)

### EDITIONS

Available in: Lightning Experience

Available in: **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** editions

## Enable Email Bounce Handling

With bounce handling, reps know when an email doesn't get delivered to recipients. And they also know which lead, contact, or person account has a bad email address when there's a permanent delivery failure. Review the considerations for the behavior resulting from a soft bounce (a temporary delivery failure), or from a hard bounce (a permanent delivery failure).

To display email bounce information in the activity timeline, enhanced email must be enabled.

 **Note:** The activity timeline doesn't show the bounce warning for list emails.

1. From Setup, click **Email**, then click **Deliverability**.
2. Select **Activate bounce management**.
3. Optionally, select **Return bounced emails to sender**. Bounced emails are returned as attachments to the sender.

When an email results in a soft or hard bounce, the email record's `IsBounced` field is set to `True`, and a bounce icon is shown on the activity timeline.

 **Note:** Emails sent through Einstein Activity Capture don't update the `IsBounced` field.

With a hard bounce, the contact, lead, or person account's `EmailBouncedDate` and `EmailBouncedReason` fields are populated, and a bounce icon is shown on those record detail pages.

Use the `EmailBouncedReason` field in list views to find contacts, leads, and person accounts with email addresses that generated hard bounces. You can use it in a similar way in reports and in workflows to create workflow rules based on the hard bounce status. `EmailBouncedReason` is a text field, and contains whatever description was provided in the email bounce reply.

 **Note:** This value isn't provided by Salesforce.

In the highlights panel at the top of the contact, lead, or person account detail pages, an alert icon appears next to the email address. The icon indicates that the email address generated a hard bounce. Ensure that the email address field is in the highlights panel of the detail record page so that users can see the alert.

To clear the alert, edit the contact, lead, or person account record and confirm that the current email address is correct, or update it.

 **Note:** Bounce handling doesn't support encrypted email addresses. If you need email bounce handling, don't encrypt the standard Email field.

### SEE ALSO:

- [Guidelines for Configuring Deliverability Settings for Emails Sent from Salesforce](#)
- [General Shield Platform Encryption Considerations](#)

### EDITIONS

Available in Lightning Experience and all Salesforce apps in: **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer Editions**

### USER PERMISSIONS

To enable email tracking:

- [Customize Application and Modify All Data](#)

## Email Open Tracking and Email Opt Out

Keeping an eye on if and when customers open your outgoing emails is the best way to know if they're successful. Honor customer requests for different levels of email privacy; some customers don't want any email, while others want to get commercial email only.

### [Enable the Enforce Email Privacy Settings Preference](#)

You can set up Salesforce to respect each recipient's email privacy preferences, set in the data privacy record based on the Individual object. These preferences apply to contacts, leads, person accounts, and users, and include email tracking and opting out of email.

### [Track External and Internal Email](#)

Tracking emails tells you whether someone has opened an email or clicked the included link. Choose what type of emails your company wants to track. Emails to external email addresses are tracked by default.

### [Use and Filter Email Open Tracking](#)

Keeping an eye on if and when customers open your outgoing emails is the best way to know if the emails are successful. You can turn on tracking for all Salesforce emails, or allow recipients to specify that they don't want emails from you to be tracked. You can also filter out engagements based on the reader's email IP address.

### [Opting Out of Email](#)

Your customers expect the ability to choose which emails to receive, if any, from your company and its sales reps. Set up Salesforce to save your customers' individual choices.

#### EDITIONS

Available in Lightning Experience and all Salesforce apps in: **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## Enable the Enforce Email Privacy Settings Preference

You can set up Salesforce to respect each recipient's email privacy preferences, set in the data privacy record based on the Individual object. These preferences apply to contacts, leads, person accounts, and users, and include email tracking and opting out of email.

All organizations must enable Data Protection and Privacy and select Make data protection details available in records. Complete all the steps detailed in Salesforce Help to fully set up data protection and privacy.

To use email tracking, Lightning Experience organizations must enable Enhanced Email.

1. From Setup, enter *Deliverability* in the **Quick Find** box, and then select **Deliverability**.
2. In the Data Protection and Privacy section, select **Enforce email privacy settings**.

Email privacy settings, including email tracking, reflect the preferences set from the data privacy record based on the Individual object and the Email Opt Out setting on a contact, lead, or person account detail page.

#### EDITIONS

Available in Lightning Experience in: **Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** editions

#### USER PERMISSIONS

To update settings:

- [Customize Application](#)

## Track External and Internal Email

Tracking emails tells you whether someone has opened an email or clicked the included link. Choose what type of emails your company wants to track. Emails to external email addresses are tracked by default.

In Setup, go to Inbox Setup Assistant and turn External Email Tracking or Internal Email Tracking on or off.

#### EDITIONS

Available in: Available with Inbox, which is available in **Professional, Enterprise, Performance, and Unlimited** Editions

## Use and Filter Email Open Tracking

Keeping an eye on if and when customers open your outgoing emails is the best way to know if the emails are successful. You can turn on tracking for all Salesforce emails, or allow recipients to specify that they don't want emails from you to be tracked. You can also filter out engagements based on the reader's email IP address.

### Considerations for Email Open Tracking

Keep these considerations in mind when working with email tracking.

#### Enable Email Tracking for All Customers Opening Email from Your Company

Let sales reps see if and when customers open email sent through Salesforce. In Lightning Experience, reps see tracking info right in the activity timeline, and—if they aren't using Einstein Activity Capture—in the HTML Email Status report. Salesforce Classic users see the indicators in a report or in a related list. This feature applies to all emails sent through Salesforce; it can't be turned off for individual emails or customers.

#### Enable Email Tracking for Individuals Opening Email from Your Company

Help your sales reps honor customer requests to not track if and when they open email that reps send through Salesforce. Configure Salesforce to respect individual email tracking preferences for contacts, leads, and person accounts in the data privacy record based on the Individual object.

#### Enable Filtering for Email Tracking by IP Address

To ensure that email tracking engagement data isn't included when an email is opened by an internal user, add your company's IP address range. If an email is set to be tracked and is opened by someone with an IP address in the range, that open isn't included as an engagement.

#### Set Up Filtering for Email Tracking by IP Address

To ensure that email tracking engagement data isn't included when an email is opened by an internal user, add your company's IP address range. If an email is set to be tracked and is opened by someone with an IP address in the range, that open isn't included as an engagement.

## Considerations for Email Open Tracking

Keep these considerations in mind when working with email tracking.

In Lightning Experience, email tracking applies to all emails and list emails sent through Salesforce, Office 365, Gmail, Email Relay, and Einstein Activity Capture.

If email tracking was enabled before, emails sent before Winter '19 don't show the correct tracking information in Lightning Experience. The activity timeline and the email record home show Not Tracked for these emails. The correct tracking information is available in the HTML Status report.

An email isn't tracked if any of the following are true:

- The recipient field has an email address only, and no related contact, lead, or person account.
- The body of an email is blank.
- The email is sent from Cases or from an email that uses Email-to-Case. If you create an email from a Case in Salesforce Classic using the `EmailAuthor` action and send it to a Contact, the email is tracked.
- A user configures their browser to not download embedded images.

For full functionality of the HTML Status report, the user must have access to leads and contacts.

Spam filters or mail gateway scans can cause inaccurate results for user email tracking. An email can seem opened, or a link can seem clicked, even though no recipient has opened the email or clicked a link.

### EDITIONS

Available in Lightning Experience, Salesforce Classic, and all Salesforce apps in: **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

### EDITIONS

Available in Lightning Experience, Salesforce Classic, and all Salesforce apps in: **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Pixel-based open tracking technology is inherently imprecise and doesn't generate foolproof signals. There are false positives and false negatives.

Emails sent by Einstein Activity Capture users don't show up in the HTML Email Status report, but tracking info is displayed in the activity timeline.

List emails show tracking information in the HTML Email Status report only.

In Salesforce Classic, email tracking applies to HTML-based emails and mass emails.

Email tracking in Lightning Experience doesn't apply to emails sent from Cases or emails that use Email-to-Case.

Lightning Experience organizations must enable Enhanced Email.

## Enable Email Tracking for All Customers Opening Email from Your Company

Let sales reps see if and when customers open email sent through Salesforce. In Lightning Experience, reps see tracking info right in the activity timeline, and—if they aren't using Einstein Activity Capture—in the HTML Email Status report. Salesforce Classic users see the indicators in a report or in a related list. This feature applies to all emails sent through Salesforce; it can't be turned off for individual emails or customers.

In Lightning Experience, email tracking applies to all emails and list emails sent through Salesforce, Office 365, Gmail, Email Relay, and Einstein Activity Capture.

1. From Setup, enter *Activity Settings* in the Quick Find box, then select **Activity Settings**.
2. Select **Enable Email Tracking**.
3. Click **Submit**.

For regular emails in Lightning Experience, you can see email tracking information in the activity timeline. You can also add the *First Opened* and *Last Opened* fields to your email page layouts to see the tracking info for emails not sent through Einstein Activity Capture.

In Salesforce Classic, you can see email tracking information in the HTML Email Status related list and the HTML Email Status report.

### SEE ALSO:

[Store Customers' Data Privacy Preferences](#)

[Considerations for Tracking Emails Sent from Salesforce Inbox](#)

### EDITIONS

Available in Lightning Experience, Salesforce Classic, and all Salesforce apps

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

### USER PERMISSIONS

To enable email tracking:

- [Customize Application](#)

## Enable Email Tracking for Individuals Opening Email from Your Company

Help your sales reps honor customer requests to not track if and when they open email that reps send through Salesforce. Configure Salesforce to respect individual email tracking preferences for contacts, leads, and person accounts in the data privacy record based on the Individual object.

All organizations must enable Data Protection and Privacy and select Make data protection details available in records. Complete all the steps detailed in Salesforce Help to fully set up data protection and privacy.

All organizations must enable Enforce email privacy settings.

Lightning Experience organizations must enable Enhanced Email.

1. Confirm that the `Individual` field is on the contact, lead, and person account page layouts.
2. Locate the data privacy record based on the Individual object, and select the **Details** tab in the record.
3. Select either **Don't Process** or **Don't Track**.

 **Note:** The Email Opt Out selection in contacts, leads, and person account page layouts continues to work as it did.

SEE ALSO:

[Data Protection and Privacy](#)

[Store Customers' Data Privacy Preferences](#)

## Enable Filtering for Email Tracking by IP Address

To ensure that email tracking engagement data isn't included when an email is opened by an internal user, add your company's IP address range. If an email is set to be tracked and is opened by someone with an IP address in the range, that open isn't included as an engagement.

 **Note:** If your org has Einstein Activity Capture enabled, either Inbox or Sales Engagement must also be enabled.

1. From Setup, in the Quick Find box, enter *Filter Email Tracking*, and then select **Filter Email Tracking**.
2. Enable Filter Email Tracking by IP Address.

Enter IP address ranges. Use IPv4 addresses. IPv6 addresses aren't supported for IP address filtering.

In Outlook and Gmail, the IP address used to track email opens is the address of the computer where the email is opened. For Gmail, we recommend Gmail IP address ranges and Internet gateway IPs. For more information about Google IP addresses, see [Google IP address ranges for outbound mail servers](#).

If the email is opened on a machine with a private network address, then the IP address is recorded as the public address of the email gateway. The IP address isn't related to the customer or the email provider.

### EDITIONS

Available in Lightning Experience and Salesforce Classic in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To enable individually based email tracking:

- Customize Application

### EDITIONS

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

Available with Sales Engagement, which is available for an extra cost in: **Enterprise, Performance,** and **Unlimited** Editions

Available with Inbox, which is available in **Professional, Enterprise, Performance,** and **Unlimited** Editions

### USER PERMISSIONS

To enable Filter Email Tracking

- Customize Application

 **Note:** The IP address ranges are synchronized with Einstein Activity Capture and Inbox IP addresses that are filtered. Synchronization ensures that all email messages from those IP addresses are filtered.

SEE ALSO:

[Set Up Filtering for Email Tracking by IP Address](#)

## Set Up Filtering for Email Tracking by IP Address

To ensure that email tracking engagement data isn't included when an email is opened by an internal user, add your company's IP address range. If an email is set to be tracked and is opened by someone with an IP address in the range, that open isn't included as an engagement.

 **Note:** If your org has Einstein Activity Capture enabled, either Inbox or Sales Engagement must be enabled.

If Filter Email Tracking by IP Address isn't enabled, enable it.

1. From Setup, in the Quick Find box, enter *Filter Email Tracking*, and then select **Filter Email Tracking**.
2. Click **New**.
3. Enter the first and last IP address of the range. Optionally, enter a description.

Ask your email admin or someone in your IT department for help with determining the range.

In Outlook and Gmail, the IP address used to track email opens is the address of the computer where the email is opened. For Gmail, we recommend Gmail IP address ranges and Internet gateway IPs. For more information about Google IP addresses, see [Google IP address ranges for outbound mail servers](#).

If the email is opened on a machine with a private network address, then the IP address is recorded as the public address of the email gateway. The IP address isn't related to the customer or the email provider.

 **Note:** Use IPv4 addresses. IPv6 addresses aren't supported for IP address filtering.

4. Save your work.

 **Note:** It can take a few minutes before Salesforce begins filtering the IP address range.

 **Example:** Most companies enter the IP addresses for their internal email.

SEE ALSO:

[Enable Filtering for Email Tracking by IP Address](#)

### EDITIONS

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

Available with Sales Engagement, which is available for an extra cost in: **Enterprise, Performance,** and **Unlimited** Editions

Available with Inbox, which is available in **Professional, Enterprise, Performance,** and **Unlimited** Editions

### USER PERMISSIONS

To create IP address ranges to filter email tracking

- Customize Application

## Opting Out of Email

Your customers expect the ability to choose which emails to receive, if any, from your company and its sales reps. Set up Salesforce to save your customers' individual choices.

### Considerations for Opting Out of Email

Keep these considerations in mind when setting up Salesforce to let your customers opt out of email from your company.

#### Individually Opting Out of Email

You can set up Salesforce to let individuals choose to opt out of emails from your company.

#### What's the Difference Between Email Opt Out and Individual Email Privacy Settings?

For leads, contacts, and person accounts, there are several email privacy preferences that affect whether that person can be sent an email.

#### What's the Difference Between Commercial and Non-Commercial Email?

Email privacy regulations have several definitions for the kinds of email that can be sent to users with email privacy preferences. Learn about two kinds of email: commercial and non-commercial.

#### Choose Which Sales Reps Can Send Non-Commercial Email

Sometimes you have relevant information to email to customers even when they've chosen not to receive any commercial emails from your company. For example, for non-commercial email such as shipping information, updated billing balances, or a warning to let them know their contract is expiring. Manage which sales reps can send non-commercial emails to these customers.

### EDITIONS

Available in Lightning Experience and Salesforce Classic in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

## Considerations for Opting Out of Email

Keep these considerations in mind when setting up Salesforce to let your customers opt out of email from your company.

- When enabling email privacy settings, Data Protection and Privacy must also be enabled.
- In Lightning Experience, reps need read visibility to the field Email Opt Out on leads and contacts. Check field level security on this field to confirm visibility. Without access to the field, reps don't see any warning messages until they click send.
- In Salesforce Classic, opting out of email with email privacy settings applies to regular emails (such as with Email Author) and mass email.
- In Lightning Experience, opting out of email with email privacy settings, using the data privacy record based on the Individual object, applies to these emails
  - Regular emails (such as with the Lightning Email Action)
  - List emails
  - SingleEmailMessage and MassEmailMessage APIs
  - Email addresses unassociated with a Salesforce record

For example, if a user's email address is automatically added to the BCC field by the Compliance BCC Email setting, a warning message appears. The email isn't sent unless an Individual record is associated with the user's record.

The same is true for other email addresses. All email addresses must be associated with a people record in Salesforce, and those records must be associated with an Individual record.

- Opting out of email with email privacy settings doesn't apply to the Cases Email Action, Workflows, or Process Builder.

### EDITIONS

Available in Lightning Experience and Salesforce Classic in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

- In the Outlook and Gmail integrations, sales reps see messaging regarding a contact or lead's email preferences and restrictions. It's the sales rep's responsibility to respect that privacy when sending emails from Outlook or Gmail.

SEE ALSO:

[Considerations for Email Privacy Preferences in the Outlook and Gmail Integrations](#)

## Individually Opting Out of Email

You can set up Salesforce to let individuals choose to opt out of emails from your company.

- 📌 **Note:** List emails aren't sent to recipients with Email Opt Out selected or with Don't Market, Don't Process, or Forget this Individual selected in the data privacy record based on the Individual object. Case email can always be sent to recipients with Email Opt Out or Don't Market selected in the data privacy record based on the Individual object.

### Allow Opting Out of Email with Email Privacy Settings

If your company hasn't set up email privacy settings, complete these steps to allow opting out of email.

1. Add the *Email Opt Out* field to lead, contact, and person account page layouts.
2. Check field level security settings on the *Email Opt Out* field and confirm that users have access. Without access to the field, reps don't see any warning messages until they click send.
3. For each record, select the **Email Opt Out** field to prevent that person from getting commercial emails from Salesforce.

### Allow Opting Out of Email with Email Privacy Settings

If your company has email privacy settings, complete these steps to allow opting out of email.

All organizations must enable Data Protection and Privacy and select Make data protection details available in records, and enable Enforce email privacy settings. Complete all the steps detailed in Salesforce Help to fully set up data protection and privacy.

- 📌 **Note:** In Lightning Experience, reps need read visibility to the field Email Opt Out on leads and contacts. Check field level security on this field to confirm visibility. Without access to the field, reps don't see any warning messages until they click send.
1. Confirm that the *Individual* tab is on the contact, lead, and person account page layouts.
  2. Locate the data privacy record based on the Individual object, and select the **Details** tab in the record.
  3. Select **Don't Market, Don't Process, or Forget this Individual**. Customers with the Don't Market preference can receive non-commercial emails from reps with the Send Non-Commercial Email permission.

- 📌 **Note:** The Email Opt Out selection in contacts, leads, and person account page layouts continues to work as it did.

## EDITIONS

Available in Lightning Experience and Salesforce Classic in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

## USER PERMISSIONS

To enable opting out:

- **Customize Application**

## What's the Difference Between Email Opt Out and Individual Email Privacy Settings?

For leads, contacts, and person accounts, there are several email privacy preferences that affect whether that person can be sent an email.

### Email Opt Out

Set this preference on the record detail page. This person can't be sent any emails, unless the email sender is assigned the Send Non-Commercial Email permission. That permission applies only to sending email from Lightning Experience.

### Don't Market

Set this preference on the Individual record's detail page. This person can receive non-commercial emails only. You need the Send Non-Commercial Emails user preference to send an email.

### Forget this individual

Set this preference on the Individual record's detail page. This person can't receive any emails.

### Don't Process

Set this preference on the Individual record's detail page. This person can't receive any emails.

### Don't Track

Set this preference on the Individual record's detail page. This person doesn't want their interactions with emails tracked.

#### EDITIONS

Available in Lightning Experience and Salesforce Classic in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

## What's the Difference Between Commercial and Non-Commercial Email?

Email privacy regulations have several definitions for the kinds of email that can be sent to users with email privacy preferences. Learn about two kinds of email: commercial and non-commercial.

Sales Cloud offers two kinds of email classifications: commercial and non-commercial. What types of emails fit into these classifications varies from country to country. For example, in some jurisdictions, commercial email could include advertisements or promotions of a commercial product or service, while billing statements and invoices would be considered non-commercial emails.

In Sales Cloud, reps can send commercial emails only to recipients who have not selected to opt out of commercial emails. Recipients whose email privacy preferences are set to Do Not Market in the data privacy record based on the Individual object can be sent only non-commercial emails. Only reps with the Send Non-Commercial Email permission can send non-commercial emails.

Because marketing and privacy laws vary in different countries, you should consult with a legal expert in determining how to apply the commercial and non-commercial email classifications.

#### EDITIONS

Available in Lightning Experience and Salesforce Classic in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### SEE ALSO:

[Choose Which Sales Reps Can Send Non-Commercial Email](#)

[Opting Out of Email](#)

## Choose Which Sales Reps Can Send Non-Commercial Email

Sometimes you have relevant information to email to customers even when they've chosen not to receive any commercial emails from your company. For example, for non-commercial email such as shipping information, updated billing balances, or a warning to let them know their contract is expiring. Manage which sales reps can send non-commercial emails to these customers.

You must have the Email Opt Out field or Email Privacy enabled for this setting to take effect.

 **Note:** The **Send Non-Commercial Email** permission is on by default for all standard profiles that send email, and for custom profiles created in the Winter '19 release and later.

To prevent reps from sending email to customers who have the Email Opt Out or Don't Market privacy settings, disable Send Non-Commercial Email in their profiles. Also make sure that the setting is disabled in any permission set assigned to the rep.

1. From Setup, enter *Permission Sets* in the Quick Find box, and select **Permission Sets**.
2. Clone an existing permission set, click the name to edit it, and select **System Permissions**.
3. Deselect **Send Non-Commercial Email**.
4. Assign to this permission set to reps who you don't want to send non-commercial emails.

For customers that have selected Don't Market in the Individual record, only reps with the Send Non-Commercial Email permission can send them an email.

The Send Non-Commercial Email user permission applies to regular, 1:1 emails only.

 **Important:** In the Outlook and Gmail integrations, sales reps see messaging regarding a contact or lead's email privacy preferences. However, the Send Non-Commercial Email permission isn't enforced. It's the sales reps responsibility to respect an email recipient's privacy when sending emails from Outlook or Gmail.

### EDITIONS

Available in Lightning Experience and Salesforce Classic in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To change the setting for sending non-commercial email:

- Customize Application



## SEE ALSO:

[Considerations for Email Privacy Preferences in the Outlook and Gmail Integrations](#)

## Email Reports

Use reports to get information on emails and list emails.

### [Report on Email Messages](#)

Use reports to see which emails and senders are most effective.

### [Report on List Emails](#)

Use reports to see which list emails and senders are most engaging.

### [Considerations for Email Reports](#)

Depending on your org's email setup, use different techniques to report on email usage and effectiveness.

### EDITIONS

Available in: Essentials, Professional, Enterprise, Performance, and Unlimited editions

## Report on Email Messages

Use reports to see which emails and senders are most effective.

The email message report shows email message records created when the org has Enhanced Email on.

1. From Setup, in the Quick Find box, enter *Report Types*, then select **Report Types**.
2. Click **New Custom Report Type**.
3. Select **Email Message** as the Primary Object. Complete the fields and click **Next**.
4. Optionally, select a secondary object from among these options and save the report.
  - Leads
  - Contacts
  - Email Message Relations

The leads and contacts secondary objects include custom fields on those objects.

The email message relations secondary object includes the fields common to leads and contacts. But it doesn't include custom fields from either object.

5. Use engagement fields to determine the success of any individual email.



**Example:** Use custom email reports to answer questions such as:

- How effective is the email outreach strategy?
- Which rep sends the most effective emails?
- What's the ratio of inbound to outbound emails?

SEE ALSO:

[Set Up a Custom Report Type](#)

## Report on List Emails

Use reports to see which list emails and senders are most engaging.

The list emails report shows list email records.



**Tip:** If you want an overview of all sent email, including emails sent via list email, look at activity reports.

1. From Setup, in the Quick Find box, enter *Report Types*, then select **Report Types**.
2. Click **New Custom Report Type**.
3. Select **List Emails** as the Primary Object. Complete the fields and click **Next**.
4. Optionally, select the **List Email Sent Results** secondary object and save the report. List Email Sent Results includes these fields:
  - Email address
  - Status
  - Failure reason

### EDITIONS

Available in: Essentials, Professional, Enterprise, Performance, and Unlimited editions

### USER PERMISSIONS

To run reports:

- Create and Customize Reports and Report Builder

### EDITIONS

Available in: Essentials, Professional, Enterprise, Performance, and Unlimited editions

### USER PERMISSIONS

To run reports:

- Create and Customize Reports and Report Builder

 **Example:** Use custom list email reports to answer questions such as:

- Which list emails generated the most engagement?
- Which rep sends the most effective list emails?

## Considerations for Email Reports

Depending on your org's email setup, use different techniques to report on email usage and effectiveness.

 **Note:** Emails sent through workflows aren't reportable.

## Einstein Activity Capture

If your org is using Einstein Activity Capture, see [Activity Metrics](#) for how to get and use data on emails.

## Outlook and Gmail Integration

If your org is using an email integration, manually logged emails and events are reportable. If you have Sales Engagement enabled, you can also report on which email template, if any, was used with an email.

See [Outlook and Gmail Integration and Inbox Features](#) for more information about this feature.

## Outlook and Gmail Integration with Inbox

If your email integration includes the Inbox productivity features, your reporting can also include knowing when recipients open emails and when recipients click links in emails.

For example, you can create a field in a report that checks if the `FirstOpened` field is NULL or not. If it isn't NULL, then that email has been opened. Using this information, you can determine if outgoing emails are successful or not.

 **Note:** You can't group by this field.

If your reps are manually logging incoming emails, and the report groups records by `Email ID`, then you can easily see how many emails are getting a response. Analyze these emails to see why they're so effective, and replicate that across your org.

We recommend grouping by `Email ID`; otherwise, the grouping is by recipients.

The fields `Tracked` and `IsIncoming` are included by default.

See [Outlook and Gmail Integration and Inbox Features](#) for more information about what you can report on.

## Lightning Experience

When you're composing emails in Salesforce Lightning Experience and Enhanced Email is enabled, you can report only on your outgoing emails.

See [Report on Email Messages](#) for more information on setting up email reports.

These reports provide summary engagement information. To see information at the recipient level, use Engagement reports.

## Sales Engagement

Automatic Emails in Sales Engagement cadences aren't reported in the Email Message report. Instead, use the list email activity report.

### EDITIONS

Available in: Essentials, Professional, Enterprise, Performance, and Unlimited editions

See [Report on Email Messages](#) for more information on setting up list email reports.

## Email a Group with 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.

### [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.

#### [Enable List Email](#)

Give your users the permission to send list email.

#### [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.

#### [Email and Outreach Considerations for Salesforce Starter and Pro Suite](#)

Respect your prospects' and customers' wishes when they request only specific forms of contact from your company. These requests can include being able to opt in or opt out of specific communication types, or requesting to receive no communications at all.

### EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

### EDITIONS

Available in: Lightning Experience

Available in: **Essentials, 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.

- You can add these types of list views as a list email recipient.

- Contact list view
- Lead list view
- Campaign list view

If you enter a contact or lead's name, and a list view has the same name, the email is sent to everyone on the list view.

- In Experience Cloud sites, list email is only available to company communities.
- Campaign merge fields can't be used in list emails.
- To send a list email to person accounts, create a contact list view.
- When sending a list email, it's possible to select list views and campaigns with contact, lead, and person account entries in common. If the different entries represent the exact same record, the recipient gets one email only. If the entries are for different records, but each record has the same email address, then the recipient gets multiple emails.
- A list email isn't sent to a recipient if any of the following are true:
  - A previous email to the recipient has bounced, indicating a bad email address.
  - The recipient is missing an email address.
  - The recipient (contact, lead, or person account) selected Email Opt Out.
- If Enforce email privacy setting is enabled, a list email isn't sent to a recipient if any of the following are also true:
  - The recipient selected Don't Process.
  - The recipient selected Don't Market.
  - The recipient selected Forget this Individual.
  - The Individual record is missing.
- You can't create a list email in the Salesforce app, but you can see the activity in the Activity History related list.
- You can use Salesforce Classic to view list email activity in the Activity History list. However, to show the list email record when you click the list email activity, enhanced email must be enabled.
- 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 you send a list email that's using a Classic email template with an attachment, the attachment isn't shown in the list email record.
- Attachments are sent as links rather than as physical files. When recipients click the attachment link in the email, a preview opens in a separate browser window. From that window, they can download the file if they want.
 

A link is available until it's removed manually.
- 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 you're using Einstein Automatic Capture.
  - With Einstein Automatic Capture: the From address is the email address that's specified in your user record only. For example, you can't use any of the email addresses in your connected accounts.

### EDITIONS

Available in: Lightning Experience

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

- Without Einstein Automatic Capture: the From address is your return address or, if your return address isn't specified, your email address.

To specify how your name appears to recipients and which return address to use, open your personal settings. In My Email Settings enter the preferred Email Name and Email Address.

#### SEE ALSO:

[Send a List Email in Lightning Experience](#)

[List Email Limitations](#)

[Email Allocations per Edition](#)

[Knowledge Article: ContentDocumentLink error when Trying to Send List Email](#)

## Enable List Email

Give your users the permission to send list email.

1. From Setup, enter *Permission Sets* in the Quick Find box, and select **Permission Sets**.
2. Click one of the standard permission sets.
3. Scroll to the Systems section and click **System Permissions**.
4. On the System Permissions page, click **Edit**.
5. Select **Allow sending of List Emails**, and click **Save**.

## 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.

 **Note:** You can't create a list email in the Salesforce app, but you can see the activity in the Activity History related list.

1. Navigate to a contact or lead list view, or a campaign member view.  
Unless you want to email all campaign members, filter the campaign members list or select individual campaign members.

#### EDITIONS

Available in: Lightning Experience

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

#### USER PERMISSIONS

To add system permissions to a permission set:

- Manage Profiles and Permission Sets

#### EDITIONS

Available in: Lightning Experience

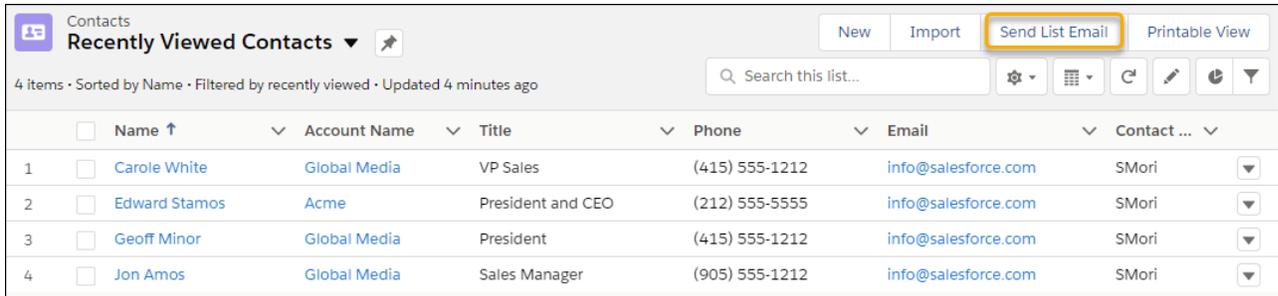
Available in: **Essentials, Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

#### USER PERMISSIONS

To send and view list emails:

- Allow sending of List Emails

- Select the checkbox next to individual records you want to email, or select all records on the page.  
If you're on any view except Recently Viewed, and no records are selected, clicking **Send List Email** selects all the records as list email recipients.
- Click **Send List Email**.



	<input type="checkbox"/>	Name ↑	Account Name	Title	Phone	Email	Contact ...
1	<input type="checkbox"/>	Carole White	Global Media	VP Sales	(415) 555-1212	info@salesforce.com	SMori
2	<input type="checkbox"/>	Edward Stamos	Acme	President and CEO	(212) 555-5555	info@salesforce.com	SMori
3	<input type="checkbox"/>	Geoff Minor	Global Media	President	(415) 555-1212	info@salesforce.com	SMori
4	<input type="checkbox"/>	Jon Amos	Global Media	Sales Manager	(905) 555-1212	info@salesforce.com	SMori

- 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.



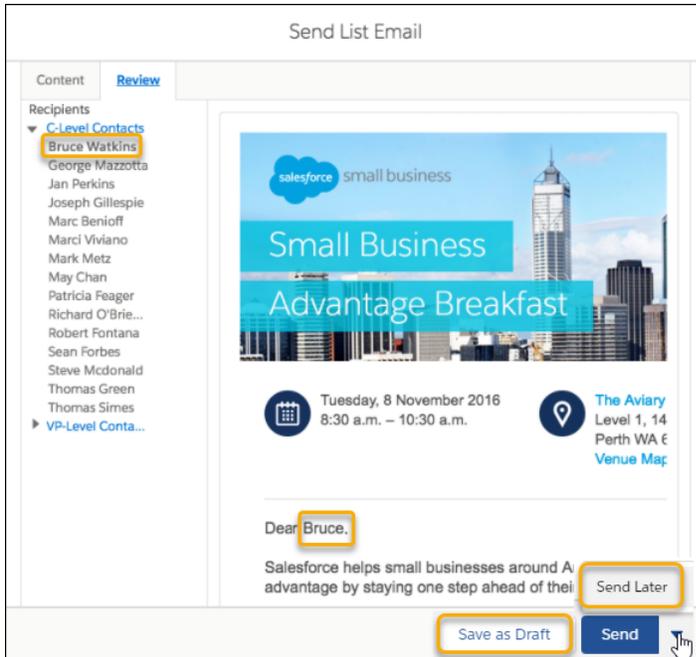
Recipients Trade Show 2018 Local Related Campaign Trade Show...

Enter Subject...

**Content** Review

Font Size **B I U A** [List Icons]

- Add content or insert an email template.
- Customize the content or add attachments.
- On the **Review** tab, confirm that the preview looks correct. Click each recipient's name to see any personalization.



8. Click **Save as Draft**, **Send**, or **Send Later**.

To continue editing a list email draft or updating a schedule, go to the List Emails home page.

If you choose Send Later, 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, or on the List Emails home page.

The list email appears in the activity timeline for the recipient and the recipient's account, if Roll up activities to a contact's primary account is enabled. 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.

To see the HTML Email Status report, go to the Reports page, click **New Report**, and search for *HTML*. Select HTML Email Status. This report shows the results of all list emails.

SEE ALSO:

[Considerations for Sending List Email in Lightning Experience](#)

[Schedule Emails with Send Later](#)

[What Are the Differences Between Activity Timeline and Activity History?](#)

[Video: Send Personalized Emails to a Group \(English Only\)](#)

[Knowledge Article: ContentDocumentLink error when Trying to Send List Email](#)

[Knowledge Article: List Email - Engagement Metrics](#)

[How do I add contacts and leads to campaigns?](#)

## 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 for the body and 3,000 characters for the subject. These limits include visible characters and other characters in the email, including markup.
- The maximum size of email messages for email services is 35 MB and includes the email header, subject, body, and attachments. Because attachments are sent as links, a large attachment doesn't cause an email message to exceed these limits. Email size can also vary due to things beyond user control, such as character set and transfer encoding of the parts of the email.
- You can manually select up to 200 contacts or leads from a contact or lead list view.
- You can add up to 10 list views in the Recipients field.
- List emails count against an org's mass email daily send limit, which is typically 5,000 email recipients per day.
- In Developer Edition orgs and trial orgs, you can send to no more than 10 external email recipients per day using mass email and list email. 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, you can send emails to a maximum of 50 recipient addresses per day.

SEE ALSO:

[Email Allocations per Edition](#)

## Email and Outreach Considerations for Salesforce Starter and Pro Suite

Respect your prospects' and customers' wishes when they request only specific forms of contact from your company. These requests can include being able to opt in or opt out of specific communication types, or requesting to receive no communications at all.

Data protection and privacy regulations require you and your company to honor people's requests about how you use their data and how you communicate with them. Regions and countries have specific regulations, such as:

- General Data Protection Regulation (GDPR), European Union
- California Consumer Privacy Act (CCPA), United States
- Canada's Anti-Spam Law (CASL)

Familiarize yourself with the regulations for the regions you sell to, and follow that region's local rules.

It's your company's responsibility to provide a consent management path for your prospects and customers. For example, your consent path can use Salesforce to include opt-in, opt-out, or unsubscribe information in email footers. Directions could instruct recipients to reply with their consent preferences or provide a link to an Unsubscribe page hosted on your company's website. In Salesforce, use the Email Opt Out and Do Not Call fields on leads and contacts to indicate the preference. Leads and contacts with the Email Opt-Out option don't receive emails when added to a list email.

### EDITIONS

Available in: Lightning Experience

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

### EDITIONS

Available in: Lightning Experience

Available in: **Starter and Pro Suite** Editions. Your edition determines the options you have.

## 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 are sent as links rather than as physical files. When recipients click the attachment link in the email, a preview opens in a separate browser window. From that window, they can download the file if they want. 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.

### EDITIONS

Available in: Salesforce Classic

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

- 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](#)

## 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 \(Salesforce Classic\)](#)

- 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**.
- Select a list view of recipients, and then click **Go!**.
- All recipients in the list view are selected by default. To remove recipients, deselect them.
- Click **Next**.
- Choose an email template.
- To view the templates, click the **Preview** links.
- Click **Next**.
- 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.
- In Delivery Options, send the email, or choose a date and time zone for sending the email in the future.

### 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

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](#)

[Email a Group with List Email and Mass Email](#)

## 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.
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 email template determines the content of the mass email sent to recipients (including the subject line).
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](#)

**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](#)

[Send Mass Email in Salesforce Classic](#)

## 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.
- 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**.

### 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

### EDITIONS

Available in: Salesforce Classic

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

To view and cancel mass emails that anyone in your company scheduled, if you have the “Manage Users” permission, from Setup, enter *Mass Emails* in the *Quick Find* box, then select **Mass Emails**.

#### 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 licensed Salesforce org based on Greenwich Mean Time (GMT).

The following limitations also apply to mass emails.

- You can send mass email and list email to a maximum of 5,000 external email addresses per day per licensed Salesforce org. A day is calculated based on Greenwich Mean Time (GMT).
- The single email, mass email, and list email limits count duplicate email addresses. For example, if you have `john.doe@example.com` in your email 10 times that counts as 10 against the limit.
- API or Apex single emails can be sent to a maximum of 5,000 external email addresses per day.
- You can send an unlimited amount of email through the UI to your org’s internal users, which include portal users.
- You can send mass emails and list 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 to no more than 10 external email recipients per org per day using mass email and list email.
- You can’t send mass email using a Visualforce email template.

## 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.

### [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. Associate a letterhead to your email template to standardize your branding and increase productivity.

### [Email Template Allocations Per Edition](#)

See the allocations for email and email templates per edition.

### [Types of Email Templates](#)

Different email templates types have different features and advantages. Review the table to determine which email template type works best for you: Salesforce Classic, Lightning Experience, or Email Template Builder (created in Lightning Experience).

#### EDITIONS

Available in: **Lightning Experience and Salesforce Classic**

Available in: **All Editions**

### [Select an Email Template When You Compose an Email](#)

When composing an email, use an email template to speed up things 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. Review these suggestions to avoid the problem.

### [Email Template Permissions](#)

Enable email template features and manage permissions and access for administrators and end users.

### [Render HTML Tags in Outlook](#)

You can use HTML tags in Lightning email templates and in templates created with Email Template Builder. Ensure that these tags appear correctly in Outlook emails.

### [Use Merge Fields in Email Templates and Letterheads](#)

A merge field is a placeholder in an email template or letterhead. 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.

### [Email Template Builder](#)

The email template builder is a visual tool for creating rich, engaging email templates.

### [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. Associate a letterhead to your email template to standardize your branding and increase productivity.

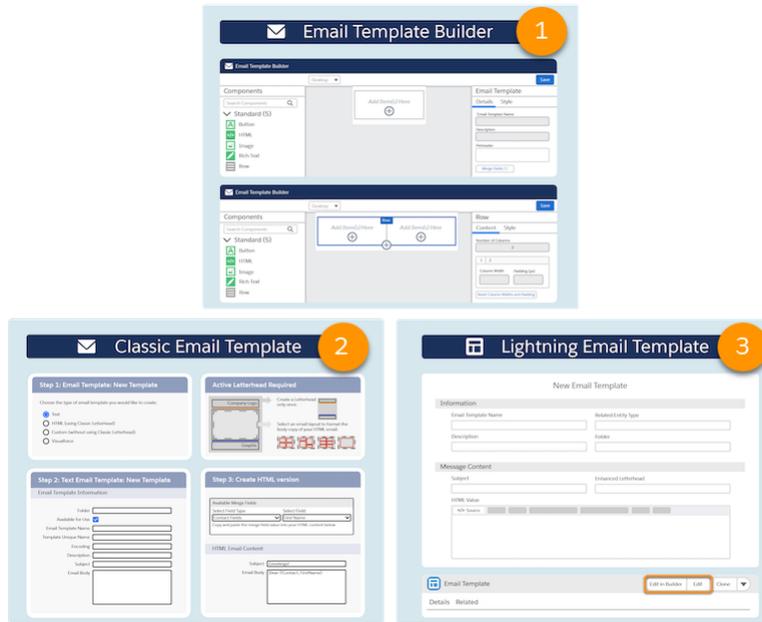
To create an email template in Salesforce, use one of these options.

- Email Template Builder
- Classic email templates
- Lightning email templates

#### EDITIONS

Available in: Lightning Experience and Salesforce Classic

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



 **Note:** Salesforce email templates can't be used in the Salesforce Mobile App.

## Email Template Allocations Per Edition

See the allocations for email and email templates per edition.

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	<ul style="list-style-type: none"> <li>384 KB for text, HTML, and custom HTML Classic templates; Lightning templates, and Email Template Builder templates</li> <li>1 MB for Visualforce templates</li> </ul>					
Extended mail merge: maximum records	1,000						
Extended mail merge: maximum total size of selected templates	1 MB						

SEE ALSO:

[Email Allocations per Edition](#)

## Types of Email Templates

Different email templates types have different features and advantages. Review the table to determine which email template type works best for you: Salesforce Classic, Lightning Experience, or Email Template Builder (created in Lightning Experience).

The evolution of email templates gives you with three types of email templates. You can continue to use a template type that you frequently access. When your company is ready to update its content, then consider changing to a newer template type.

 **Note:** You can use all three email template types within an org.

	Salesforce Classic	Lightning Experience	Email Template Builder (created in Lightning Experience)
Available in	Salesforce Classic	Lightning Experience	Lightning Experience Account Engagement
Create in	Salesforce Classic Lightning Experience (in Setup)	Lightning Experience	Lightning Experience
Letterhead	Classic Letterhead Only	Enhanced Letterhead Only	No letterhead
Merge Language	Salesforce Merge Language (SML) Only	Handlebars Merge Language (HML) SML (before Summer '18 only)	HML Only
Visualforce	✔	Can be used, but not edited	No
Packageable	✔	✔	✔
Change Sets	✔	✔	✔
Header	✔	✔	No
Footer	✔	✔	No
Use in Account Engagement?	No	No	✔
Drag and Drop	No	No	✔
List Email?	✔	✔	✔
Sales Engagement Email?	No	✔	✔

### EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

	Salesforce Classic	Lightning Experience	Email Template Builder (created in Lightning Experience)
Workflows and Automation?	✓	✓	✓
Folders	Classic Folders	Enhanced Folders	Enhanced Folders
Email Templates Home?	No	✓	✓

## Select an Email Template When You Compose an Email

When composing an email, use an email template to speed up things 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 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.

Your email template can also include a letterhead. You'll see the letterhead after you insert the template.

4. Edit your email as needed, then preview and send.

Some things are different when you use email templates in the cases email composer.

- Save and Save As aren't available.
- When you insert another template, it doesn't replace the existing content.

### SEE ALSO:

[Send List Email in Lightning Experience](#)

[Send Mass Email in Salesforce Classic](#)

[Create an Email Template in Lightning Experience](#)

[Video: Send Personalized Emails to a Group \(English Only\)](#)

### 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. Review these suggestions to avoid the problem.

When getting info from external sources, you could 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.

 **Note:** The following suggestions apply to email templates in Salesforce Classic and Lightning Experience, including templates created in Email Template Builder.

- 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.
- 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.

### EDITIONS

Available in: Salesforce Lightning Experience and Salesforce Classic

Available in: **All** Editions

## Email Template Permissions

Enable email template features and manage permissions and access for administrators and end users.

### Lightning and Email Template Builder Templates

User	Preferences and Permissions Required
Create a Lightning email template:	Lightning Experience User
Create an Email Template Builder template:	Access Drag-and-Drop Content Builder
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 AND Edit rights to the email or the email template's folder
Delete a template you created:	None.
To delete email templates:	Modify All Data, template ownership, or Edit rights to the email template folder OR If the template is in a public folder: Manage Public Lightning Email Templates permission

### EDITIONS

Available in: Lightning Experience

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

User	Preferences and Permissions Required
To update email templates:	For public email templates: Modify All Data, Manage Public Lightning Email Templates permission, or template ownership For email templates in an Enhanced folder: Modify All data, Edit access to the folder, or template ownership For private email templates: Modify All Data or template ownership
To create, edit, or delete public templates:	Manage Public Lightning Email Templates OR Modify All Data
To create email template folders:	Create Folders for Lightning Email Templates OR Modify All Data

## Classic Email Templates

User	Preferences and Permissions Required
Create a Classic email template:	Send Email permission
To edit Classic HTML templates:	Edit HTML Templates
To manage public Classic email templates and folders:	Manage Public Classic Email Templates

### SEE ALSO:

[Email Editions and Permissions in Lightning Experience](#)

## Render HTML Tags in Outlook

You can use HTML tags in Lightning email templates and in templates created with Email Template Builder. Ensure that these tags appear correctly in Outlook emails.

In Lightning email templates, you can use HTML anywhere. To use HTML, you add it in Source mode. In Email Template Builder templates, HTML tags are used in HTML components, rich text components, and custom components.

After adding HTML, test it in an email testing tool such as litmus. Or try copying and pasting the HTML into a Word document to see how the HTML is displayed.

Don't mix border and border-width instructions with padding, margin, and height information in `<style>` tags. Instead, combine one, two, or more components into one rich text component in a row, and set the margin to 0 in the rich text Style tab.

For more information on Outlook rendering, see <https://www.litmus.com/blog/mastering-outlook-a-look-back-at-common-rendering-issues>.

### EDITIONS

Available in: Lightning Experience

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

### EDITIONS

Available in: Lightning Experience for email templates created in Email Template Builder and Email Content Builder

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

Available in: Account Engagement Lightning App for all Account Engagement editions

## Use Merge Fields in Email Templates and Letterheads

A merge field is a placeholder in an email template or letterhead. 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 and Letterheads](#)

A merge field is a placeholder used in an email, a letterhead, a mail merge template, a custom link, or a formula to incorporate values from a record. When you send the email, the placeholder is replaced with the data from the record or records of the people you're emailing.

### [What's the Difference Between HML and SML Merge Languages?](#)

Lightning email templates now use the Handlebars Merge Language.

### [Use the Handlebars Merge Language in Lightning Email Templates, Enhanced Letterhead, and Email Template Builder](#)

Use the Handlebars Merge Language—available in Summer '18—to add dynamic content to your Lightning and Email Template Builder email templates.

### [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), by converting existing Lightning email templates.

### [Use the Salesforce Merge Language in Lightning Email Templates](#)

Read these considerations for using merge fields from the Salesforce Merge Language in Lightning email templates.

### [Use the Salesforce Merge Language in Classic Email Templates](#)

Classic email templates use the Salesforce Merge Language (SML) only. 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 and Letterheads

A merge field is a placeholder used in an email, a letterhead, a mail merge template, a custom link, or a formula to incorporate values from a record. When you send the email, the placeholder is replaced with the data from the record or records of the people you're emailing.

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 (Salesforce Merge Language) email template. Lightning templates created since Summer '18 are HML email templates.

- The `Created Date` and `Last Modified Date` fields display the date only, not the date and time.
- If your template contains a merge field for which a record has no data, that field doesn't 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.

Imagine an object where two fields have the same name, and one field is custom and the other isn't. Create an email template with either or both of the merge fields. The merge fields always resolve to the value of the custom field.

Best practice is to use unique names custom fields.

- Merge fields have no value if they're defined for an object that doesn't match the recipient or related to record.
- When using the Recipient merge field in a Lightning email template in the Email Composer, the data for the first recipient in the To: field is used. When using list email, the Recipient merge field gets the data for each recipient as Salesforce sends out individual emails in bulk.
- In Enhanced letterheads, only the Handlebars Merge Language and global merge fields are supported.
- If you forward or reply to an email, and the email includes characters from Salesforce's merge field syntax, those characters are ignored. They aren't resolved as if they are merge fields.

Instead, the email reply preserves the unresolved text and ensures that it can't be confused with Salesforce merge fields. Correctly formatted merge fields included in forwarded or reply-to emails are resolved normally.

- The Subject field has a limit of 1,000 characters in Lightning Experience and 230 characters in Salesforce Classic. Merge fields use hidden encoding characters that count against the character limit. If the field exceeds the character limit, we remove excess characters from the end of the field.

 **Note:** Merge fields can be used in an email, a letterhead, a mail merge template, a custom link, or a formula to incorporate values from a record.

### SEE ALSO:

[Use the Handlebars Merge Language in Lightning Email Templates, Enhanced Letterhead, and Email Template Builder](#)

[Use the Salesforce Merge Language in Lightning Email Templates](#)

[Use the Salesforce Merge Language in Classic Email Templates](#)

[Merge Fields for Experience Cloud Sites](#)

[Customize Email Sent from Experience Cloud Sites for Email Verification](#)

### 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: **Personal, Contact Manager,** and **Group Editions**

HTML and Visualforce email templates aren't available in Salesforce Classic: **Essentials** and **Personal Editions**

## What's the Difference Between HML and SML Merge Languages?

Lightning email templates now use the Handlebars Merge Language.

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 (Salesforce Merge Language) email template. Lightning templates created since Summer '18 are HML email templates.

An email template can contain one type of merge field language only.

New abilities include:

- Recipient merge fields that work with contact lead, and person account records, in one email template
- ID merge fields that create links to Salesforce records
- More organization-level fields, such as FY Start Month

SEE ALSO:

[Use the Handlebars Merge Language in Lightning Email Templates, Enhanced Letterhead, and Email Template Builder](#)

### EDITIONS

Available in: Lightning Experience

Available in: **All Editions**

List email not available in:  
**Personal, Contact Manager, and Group Editions**

## Use the Handlebars Merge Language in Lightning Email Templates, Enhanced Letterhead, and Email Template Builder

Use the Handlebars Merge Language—available in Summer '18—to add dynamic content to your Lightning and Email Template Builder email templates.

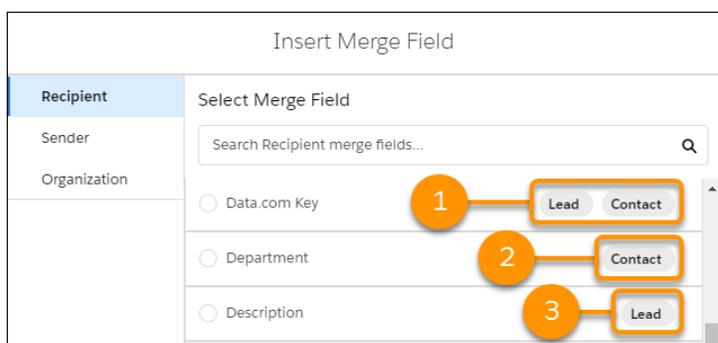
**Note:** In Summer '18, we introduced the Handlebars Merge Language (HML) for email templates in Lightning Experience. If your email template has merge fields with three curly braces ({{{}}), you're using an HML email template. If the merge fields have one curly brace ({}), or an exclamation mark (!), you're using a SML (Salesforce Merge Language) email template. Lightning templates created since Summer '18 are HML email templates.

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 person account records, in one email template

**Note:** Not every merge field can be used with every email recipient. For example, the {{{Recipient.Department}}} merge field can be used with contacts only, while no recipient merge fields can be used when a user is the recipient.



The Insert Merge Field window shows you which fields work with both Lead and Contact (1), with Contact only (2), or with Lead only (3).

- 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.

### 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.

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: 001234567890123 displays where you inserted the merge field.

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

Lightning Email Templates are available in: Lightning Experience

Available in: **All Editions**

List email not available in: **Personal, Contact Manager, and Group Editions**

#### EDITIONS

Available in: Lightning Experience for email templates created in Email Template Builder and Email Content Builder

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

Available in: Account Engagement Lightning App for all Account Engagement editions

To make sure you're using the correct syntax, select merge fields from the merge field picker.

-  **Tip:** Most merge fields for email templates correspond directly with email template fields. If there's a merge field you want to use that's not listed in the picker, type it as plain text.

To use the merge field `{{Sender.Signature}}`, have users set up their signature in My Email Settings.

-  **Note:** In the merge picker, the merge field is listed as Email Signature.

SEE ALSO:

[Convert a Lightning Email Template from SML to HML](#)

[Considerations for Using Merge Fields in Email Templates and Letterheads](#)

## 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), by converting existing Lightning email templates.

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 created with SML merge fields. You can update and save these email templates without having to remove SML merge fields.
- If you want to enter additional SML fields, do so manually.

-  **Note:** 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.

In the email composer, you can preview and send an email using an HML email template with SML merge fields. However, the HML merge fields appear as text, not as merged data from Salesforce.

- If you modify an email template so that it has HML merge fields only, 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.

### EDITIONS

Available in: Lightning Experience

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

### USER PERMISSIONS

To create email templates:

- Lightning Experience User

To update email templates:

- Modify All Data or template ownership

4. Click **Save**.

SEE ALSO:

[Use the Handlebars Merge Language in Lightning Email Templates, Enhanced Letterhead, and Email Template Builder](#)

## Use the Salesforce Merge Language in Lightning Email Templates

Read these considerations for using merge fields from the Salesforce Merge Language in 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 (Salesforce Merge Language) email template. Lightning templates created since Summer '18 are HML email templates.

### 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 `ID: {!Account.AccountNumber}`, and the recipient's email displays `ID: 001234567890123` when you send or preview it.

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.

### Guidelines for Using Merge Fields

In Lightning email templates, merge fields defined for an object that doesn't match the recipient or Related To record don't have any value.

-  **Note:** Enhanced letterheads support the Handlebars Merge Language only.

If you use a merge field for which there's no data in a particular record, that field doesn't appear in the sent email.

The following types of merge fields aren't supported in Lightning 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)
- Email message merge fields

#### EDITIONS

Available in: Lightning Experience

Available in: **All Editions**

List email not available in:  
**Personal, Contact Manager, and Group Editions**

## Use the Salesforce Merge Language in Classic Email Templates

Classic email templates use the Salesforce Merge Language (SML) only. 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 (Salesforce Merge Language) email template. Lightning templates created since Summer '18 are HML email templates.

### 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.

### 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.

#### 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**

- 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 Contact field can only be used for templates for contacts.
- Leads: 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 these 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 and Letterheads](#)

## 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.

### [Create an Email Template in Lightning Experience](#)

Use email templates to save time and standardize email sent by you or others in your organization. Use merge fields or enhanced letterhead if you need them. Templates you create are automatically private, but you can make them available for use by others in your organization.

### [Public and Private Email Templates in Lightning Experience](#)

All users have their own, private, templates and can access templates in public folders. Manage who can create, edit, and delete public email templates in Lightning Experience and Email Template Builder.

### [Folders and Enhanced Sharing in Lightning Experience](#)

Use folders and enhanced sharing to let users decide who can use which email templates. Otherwise, all email templates are public and available to all users.

#### EDITIONS

Available in: Salesforce Lightning Experience

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

### [Enhanced Letterheads in Lightning Experience](#)

A letterhead standardizes the information in the header and footer of an email template. Often, a letterhead shows a company's logo and contact information. Enhanced letterheads can include rich text, merge fields, images, links, and other styling. To be associated with an enhanced letterhead, the Lightning email template must use the Handlebars Merge Language.

### [HTML Tags in Lightning Email Templates](#)

Learn about using HTML tags in Lightning templates.

### [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.

### [Supported File Types for Lightning Email Attachments in Packaging and Change Sets](#)

When a Lightning email template is packaged or added to a change set, only some attachment types can be added. When valid, attachments are added automatically.

## Create an Email Template in Lightning Experience

### USER PERMISSIONS

To create and send email templates:	Lightning Experience User
To attach files to emails or email templates:	Lightning Experience User AND Access to the file you're attaching AND Edit rights to the email or the email template's folder
To delete email templates:	Modify All Data, template ownership, or Edit rights to the email template folder OR If the template is in a public folder: Manage Public Lightning Email Templates permission
To update email templates:	For public email templates: Modify All Data, Manage Public Lightning Email Templates permission, or template ownership For email templates in an Enhanced folder: Modify All data, Edit access to the folder, or template ownership For private email templates: Modify All Data or template ownership

### EDITIONS

Available in: Lightning Experience

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

Use email templates to save time and standardize email sent by you or others in your organization. Use merge fields or enhanced letterhead if you need them. Templates you create are automatically private, but you can make them available for use by others in your organization.

 **Note:** If you're using a free org, you can have up to 500 email templates, of any kind, in that org.

If you're using Service Cloud, the [Service Setup Assistant](#) provides you with basic email templates and sets up case notifications that email the case contact when a case is created, updated, assigned, and closed.

1. From the email composer, 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 an entity in the **Related To** field. The kind of record you choose affects which merge fields are available in the merge picker. If you select Contact or Lead, or leave the field blank, the template is a global template. A global template can use global merge fields only.
4. Compose the email to use as your template, or select an existing email template. Quick text works with the Salesforce Merge Language (SML) used in Salesforce Classic email templates and Lightning email templates created before Summer '18. It doesn't work with the Handlebars Merge Language (HML) used in Lightning email templates.
5. Add a subject. To include merge fields, type them in manually.
6. Add any images you want in the template. Use the **Insert Images** icon or copy and paste the image.
7. Click the **Merge** icon and use the merge picker to insert merge fields.
8. Click the **Source** icon to add HTML code. If you want to navigate to the record or other Salesforce pages as you work, pop out the composer window. Some email clients don't respect the `<style>` tag, so use inline styles to format text.
9. Add any attachments you want in the template. After a template is saved, any content document links (Salesforce file links) are converted to content asset links. If an email template has an attachment, you can't use **Save** or **Save As** to make a copy of it from the email composer.
10. Click the **Merge** icon and use the merge picker to insert merge fields.
11. Click the **Templates** icon and then save the email template as new. To associate an enhanced letterhead with the email template, edit the existing template from the Email Templates page. From the Enhanced Letterhead dropdown list, select a letterhead.

SEE ALSO:

[Considerations for Setting Up Sales Engagement](#)

[Email Customers in Lightning Experience](#)

[Convert a Lightning Email Template from SML to HML](#)

## Create a Template from the Email Templates Page

The screenshot shows the 'New Email Template' form in Lightning Experience. The form is titled 'Lightning Email Template' and is divided into two main sections: 'Information' and 'Message Content'. The 'Information' section includes fields for 'Email Template Name', 'Related Entity Type', 'Description', and 'Folder'. The 'Message Content' section includes fields for 'Subject', 'Enhanced Letterhead', and 'HTML Value'. The 'HTML Value' field has a toolbar with icons for '</> Source', 'Merge', 'Image', and 'Code'. At the bottom of the form, there is a toolbar with buttons for 'Edit in Builder', 'Edit', and 'Clone'. The 'Edit' button is highlighted with an orange box. Below the form, there are tabs for 'Details' and 'Related'.

1. Click **New Email Template**.
2. Enter the template's name.
3. Add a subject. To include merge fields, type them in manually.
4. Optionally, 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're composing has a corresponding Related To record.
5. If you want, select a letterhead from the **Enhanced Letterhead** dropdown list.
6. Click **Save**.
7. Click **Edit**.
8. In the HTML Value field, compose the email to use as your template.
9. Add any images you want in the template. Use the **Insert Images** icon or copy and paste the image.
10. Click the **Merge** icon and use the merge picker to insert merge fields.
11. Click the **Source** icon to add HTML code.
12. Add any attachments you want in the template. After a template is saved, any content document links (Salesforce file links) are converted to content asset links.
13. Click **Save**.

When you clone a template, or choose Save As while editing a template in an email composer, the associated letterhead is saved with the new template.

 **Note:** As of Summer '19, agents and reps using case emails can no longer use Save or Save As to edit or create email templates.

## Public and Private Email Templates in Lightning Experience

All users have their own, private, templates and can access templates in public folders. Manage who can create, edit, and delete public email templates in Lightning Experience and Email Template Builder.

### [Select Who Can Manage Public Email Templates in Lightning Experience](#)

Users need the Manage Public Lightning Email Templates permission to create, edit, and delete public templates. Users with this permission, as well as users with the Modify All Data permission or the System Administration profile, can edit and delete any public templates, including ones they don't own.

### [Manage Public and Private Email Templates in Lightning Experience](#)

Everyone can edit their own private templates and any public templates that they own. If you have permission, you can also create, edit, and save public templates.

### [Considerations for Using Public and Private Email Templates in Lightning Experience](#)

Review these considerations before implementing private and public email templates.

## Select Who Can Manage Public Email Templates in Lightning Experience

Users need the Manage Public Lightning Email Templates permission to create, edit, and delete public templates. Users with this permission, as well as users with the Modify All Data permission or the System Administration profile, can edit and delete any public templates, including ones they don't own.

1. From Setup, enter *Permission Sets* in the Quick Find box. Then, select **Permission Sets**.
2. Click one of the permission sets, and click **System Permissions**.
3. Click **Edit**, select **Manage Public Lightning Email Templates**, and click **Save**.

 **Tip:** You can also assign this permission at the profile level.

### EDITIONS

Available in: Salesforce Lightning Experience

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

### EDITIONS

Available in: Lightning Experience

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

### USER PERMISSIONS

To create permission sets:

- Manage Profiles and Permission Sets

To assign permission sets:

- Assign Permission Sets

To edit and delete all public email templates

- Modify All Data

OR

Manage Public Email Templates

## Manage Public and Private Email Templates in Lightning Experience

Everyone can edit their own private templates and any public templates that they own. If you have permission, you can also create, edit, and save public templates.

Email templates inherit the sharing of the folder they are in.

Lightning email templates are saved in a private directory by default.

All users can edit their own private templates and any public templates that they own.

If you have the Manage Public Lightning Email Templates permission, you can also create, edit, and delete public templates.

### EDITIONS

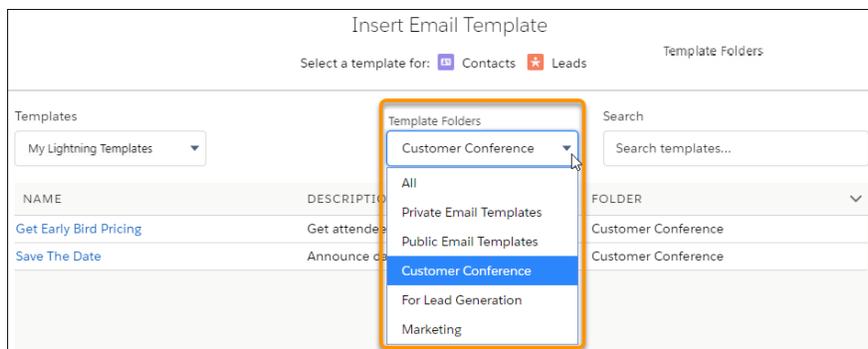
Available in: Lightning Experience

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

### USER PERMISSIONS

To create, edit, and save public email templates:

- “Manage Public Lightning Email Templates”



When a user inserts an email template, they can choose which folder to look in.

## Considerations for Using Public and Private Email Templates in Lightning Experience

Review these considerations before implementing private and public email templates.

- Users who don't own an email template don't see email templates in their private folder in the Email Templates object home. They see public email templates only when choosing an email template in the Email or List Email composer.
- Users with the Modify All Data permission can create, read, edit, and delete public email templates and their own private templates.
- Users with the View All Data permission can't modify email templates in other users' private folders. However, they can see the templates.
- When a user with the View All Data or Modify All Data permission inserts an email template into an email composer, they can access their own private templates, templates that have been shared with them, and public templates.
- Partner portal users can access public email templates only.
- Users must have Access Activities permissions in order to send emails.

### EDITIONS

Available in: Lightning Experience

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

- Customer Community and Customer Community Plus users can't access email templates in Lightning Experience.
- Email templates used in cadences must be accessible to the sales rep. Store them in the public folder.

## Folders and Enhanced Sharing in Lightning Experience

Use folders and enhanced sharing to let users decide who can use which email templates. Otherwise, all email templates are public and available to all users.

### [Enable Folders and Enhanced Sharing for Email Templates](#)

To let users create folders, enable this setting.

### [Select Which Users Can Create and Share Email Template Folders](#)

Admins and any users with the Modify All Data permission can create email template folders. To let other users create email template folders, give them the Create Folders for Lightning Email Templates permission.

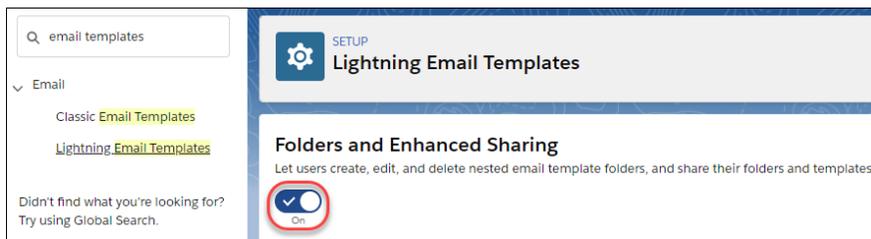
### [Considerations for Email Template Folders and Sharing](#)

As you manage and share email templates and their folders, keep these considerations in mind.

## Enable Folders and Enhanced Sharing for Email Templates

To let users create folders, enable this setting.

1. From Setup, enter *Email Templates* in the Quick Find box, then select **Lightning Email Templates**.
2. Enable Folders and Enhanced Sharing.



To let other users create folders, assign them the Create Folders for Lightning Email Templates permission.

-  **Note:** If you disable **Folders and Enhanced Sharing for Lightning Email Templates**, your reps lose access to the email template folders they created and the email templates inside those folders. To give your reps access again, enable **Folders and Enhanced Sharing for Lightning Email Templates**.

### SEE ALSO:

[Select Which Users Can Create and Share Email Template Folders](#)

[Considerations for Email Template Folders and Sharing](#)

### EDITIONS

Available in: Lightning Experience

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

### EDITIONS

Available in: Lightning Experience

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

### USER PERMISSIONS

To update settings:

- [Customize Application](#)

## Select Which Users Can Create and Share Email Template Folders

Admins and any users with the Modify All Data permission can create email template folders. To let other users create email template folders, give them the Create Folders for Lightning Email Templates permission.

1. From Setup, enter *Permission Sets* in the Quick Find box. Then, select **Permission Sets**.
2. Click one of the standard permission sets, and click **System Permissions**.
3. Click **Edit**, select **Create Folders for Lightning Email Templates**, and click **Save**.



**Tip:** You can also assign this permission at the profile level.



**Note:** If you disable **Folders and Enhanced Sharing for Lightning Email Templates**, you lose access to the email template folders you created and the email templates inside those folders. To regain access, enable **Folders and Enhanced Sharing for Lightning Email Templates**.

SEE ALSO:

- [Enable Folders and Enhanced Sharing for Email Templates](#)
- [Considerations for Email Template Folders and Sharing](#)

## Considerations for Email Template Folders and Sharing

As you manage and share email templates and their folders, keep these considerations in mind.

- Folder names must be unique between Salesforce Classic and Lightning Experience.
- Partner portal users can access public email templates.

### Lightning Experience

- Sharing on Lightning email templates is inherited from the folder it is in.
- Subfolders inherit sharing from the parent folder.
- Sharing a folder shares:
  - All the templates in that folder
  - All subfolders in that folder, along with their email templates
  - Any new templates that are added to the folder in the future
- Lightning Email Template folders are supported in first-generation managed packaging only.

### Salesforce Classic

- Classic email templates can't be saved to Lightning template folders and vice versa.
- Classic email templates maintain their own folders and folder sharing settings in Lightning Experience.

#### EDITIONS

Available in: Lightning Experience

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

#### USER PERMISSIONS

To create permission sets:

- "Manage Profiles and Permission Sets"

To assign permission sets:

- "Assign Permission Sets"

#### EDITIONS

Available in: Lightning Experience and Salesforce Classic

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

- Classic email templates and folders don't show up on the Lightning email templates home. Changes to Classic template folders must be made in Setup.

## SEE ALSO:

[Salesforce DX Developer Guide: Second-Generation Managed Packages](#)

## Enhanced Letterheads in Lightning Experience

A letterhead standardizes the information in the header and footer of an email template. Often, a letterhead shows a company's logo and contact information. Enhanced letterheads can include rich text, merge fields, images, links, and other styling. To be associated with an enhanced letterhead, the Lightning email template must use the Handlebars Merge Language.

### [Create Enhanced Letterheads in Lightning Experience](#)

Create an enhanced letterhead that you can associate with a Lightning email template. Letterheads do not show in emails in Outlook desktop. Only the template content shows.

### [Associate Enhanced Letterheads with Email Templates in Lightning Experience](#)

Generate more informative, consistent email templates with enhanced letterheads. Use enhanced letterheads with Lightning email templates that use the Handlebars Merge Language.

## Create Enhanced Letterheads in Lightning Experience

Create an enhanced letterhead that you can associate with a Lightning email template. Letterheads do not show in emails in Outlook desktop. Only the template content shows.

 **Note:** Enhanced letterheads aren't supported in Email Template Builder.

1. From the App Launcher open **Enhanced Letterheads**.  
The only default list view is Recently Viewed. To add more list views, such as All Letterheads, create one.
2. Click **New**.
3. Name the enhanced letterhead.
4. Add content to the header, footer, or both.  
Click the **Merge** icon and use the merge picker to insert merge fields.

 **Note:** Only global merge fields are available. Users with a Communities license can also use Sender's Brand merge fields.

To add HTML code, click the **Source**.

To add graphics, click the **Images**.

 **Note:** You can't copy and paste images.

5. Click **Save**.

To use the enhanced letterhead, associate it with a Lightning email template that uses the Handlebars Merge Language.

Enhanced letterheads are public by default. Any standard user who has access to Lightning email templates can add an enhanced letterhead to their template from the template record home.

### EDITIONS

Available in: Lightning Experience

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

### EDITIONS

Available in: Lightning Experience

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

### USER PERMISSIONS

To create enhanced letterheads

- Modify All Data

To update enhanced letterheads

- Modify All Data

A Lightning email template with an associated enhanced letterhead can be shared with a portal user. When the portal user inserts the template into an email, the user can see, but not edit, the enhanced letterhead content.

 **Note:** You can edit the header and footer in the Cases email composer.

## Associate Enhanced Letterheads with Email Templates in Lightning Experience

Generate more informative, consistent email templates with enhanced letterheads. Use enhanced letterheads with Lightning email templates that use the Handlebars Merge Language.

To add an enhanced letterhead to a Lightning email template, you must have created at least one enhanced letterhead already. You can add or remove an enhanced letterhead from any email template you can edit.

 **Note:** You can associate Classic letterheads with Classic email templates only.

 **Note:** Enhanced letterheads aren't supported in Email Template Builder.

1. On the Email Templates page, create a template or edit an existing template.
2. From the Enhanced Letterhead dropdown list, select a letterhead.  
If your template uses the Salesforce Merge Language, you get an error. Convert the template to use the Handlebars Merge Language and try again.

3. Click **Save**.

Now when you use the Lightning email template, the information from the enhanced letterhead also appears. In the email and list email composer, the letterhead header and footer are locked. Only the email body, within the dotted lines, can be edited. In the case email composer, or when using Gmail or Outlook, the letterhead header and footer are editable.

To preview a template and letterhead together, insert the template into the email composer or list email composer.

 **Note:** If you associate an enhanced letterhead with an email template with no Related To entity specified, and then use that template to send email through Gmail or Outlook, the letterhead isn't inserted.

SEE ALSO:

[Convert a Lightning Email Template from SML to HML](#)

## HTML Tags in Lightning Email Templates

Learn about using HTML tags in Lightning templates.

- Lightning email templates support the `<head>`, `<meta>`, `<title>`, and `<style>` tags. Add these tags when you're in Source mode.

 **Note:** These tags aren't supported in Lightning email templates created with Email Template Builder.

- Use email templates with these tags in emails, list emails, and cases.

 **Note:** These tags can't be typed into enhanced letterheads, emails, or list emails.

### EDITIONS

Available in: Lightning Experience

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

### USER PERMISSIONS

To create email templates:

- Send Email

To update email templates:

- Modify All Data OR template ownership

### EDITIONS

Available in: Lightning Experience

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

## Use Your Classic Email Templates in Lightning Experience

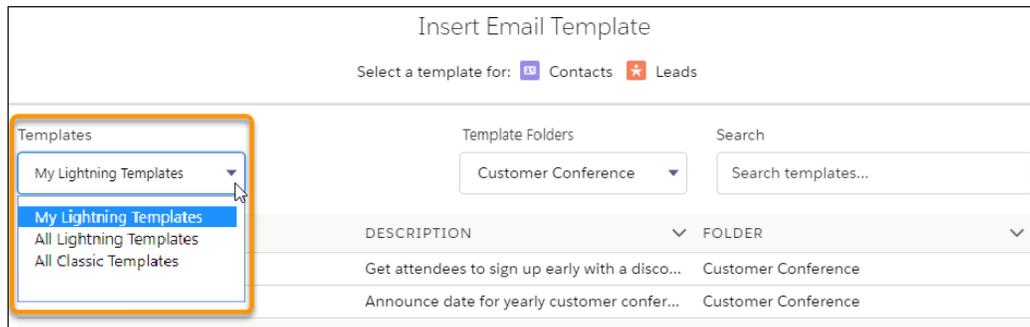
Leverage all the work and planning that went into your Salesforce Classic email templates by using the same templates in Lightning Experience. You can use your Text, Custom HTML, Letterhead, and Visualforce email templates in Lightning Experience.

When you insert an email template, change the Templates filter to Classic Email Templates if necessary.

### EDITIONS

Available in: Lightning Experience

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



 **Note:** To edit Classic email templates, use Classic Email Templates in Setup.

## 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 `EmailTemplate` field to display Classic email templates. The field is added by default to all Lightning Email action layouts.
- To edit Classic email templates, use Classic Email Templates in Setup.
- Externally linked CSS files aren't 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.
- The preview button is available in the email composer only when sending an email for a case.

### EDITIONS

Available in: Lightning Experience

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

### Attachments

- When sending an email that includes an email template, attachments from Classic email templates are read only. Download an attachment to verify the content.
- To change the attachments that are part of a Salesforce Classic email template, use Setup.
- You can add an attachment to text, custom HTML, and letterhead email templates.

 **Note:** The attachment must be in Salesforce Files.

- 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

## 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 picklist.
- Unresolved merge fields are blanked out when the template is inserted.

## Text Email Templates

- You can edit both the subject and the body.

## Custom HTML Email Templates

The behavior is the same as it is in Salesforce Classic.

- You can't edit the subject or body, unless you're using emails in the Case feed.
- 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.
- Templates are sent with their dynamic and static attachments.
- As with other email template attachments, dynamic attachments are in read-only mode and can't be removed.

SEE ALSO:

[Email Customers in Lightning Experience](#)

## Supported File Types for Lightning Email Attachments in Packaging and Change Sets

When a Lightning email template is packaged or added to a change set, only some attachment types can be added. When valid, attachments are added automatically.

### Valid File Types for Email Template Attachments in Packages and Change Sets

- .ASF
- .AVI
- .AAC
- .BMP
- .CSS
- .CSV
- .EXCEL, .EXCEL\_X, .EXCEL\_T
- .FLASH
- .GIF
- .GZIP
- .JAR
- .JPEG
- .JPG
- .JS
- .JFIF
- .M4A
- .M4V
- .MOV
- .MP3
- .MP4
- .MPEG
- .PDF
- .PJP
- .PJPEG
- .PNG
- .POWER\_POINT, .POWER\_POINT\_M, .POWER\_POINT\_T, .POWER\_POINT\_X, .POWER\_POINTT
- .RTF
- .SVG
- .SVGZ
- .TEXT
- .USDZ
- .WORD, .WORD\_M, WORD\_T, WORD\_X
- .WRF
- .XML

#### EDITIONS

Available in: Lightning Experience for Lightning Email Templates

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

Available in: Lightning Experience for email templates created in Email Template Builder

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

Available in: Account Engagement Lightning App for all Account Engagement editions

- .ZIP
- .WAV

## Email Template Builder

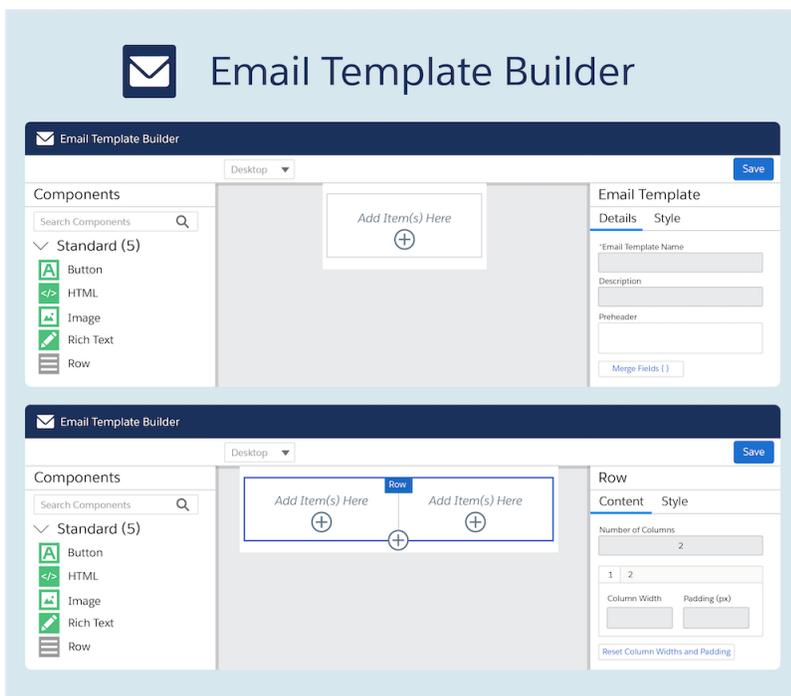
The email template builder is a visual tool for creating rich, engaging email templates.

### EDITIONS

Available in: Lightning Experience for email templates created in Email Template Builder and Email Content Builder

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

Available in: Account Engagement Lightning App for all Account Engagement editions



### Considerations for Using Email Template Builder

Before setting up Email Template Builder, review this information.

### [Select Who Can Work in Email Template Builder](#)

To let other users create templates with Email Template Builder, give them the Access Drag-and-Drop Content Builder permission. Any user that can send can insert email templates made with Email Template Builder into an email or list email.

### [Getting Around Email Template Builder](#)

As you become familiar with Email Template Builder, use this information as your guide.

### [Create and Edit Email Templates in Email Template Builder](#)

Use email templates to save time and standardize email sent by you or others in your organization.

### [Use Email Template Builder Templates in Lightning Experience](#)

Anyone who can send an email can insert a public email template.

### [Guidelines for Using Email Template Builder](#)

Review these guidelines for using Email Template Builder.

## Considerations for Using Email Template Builder

Before setting up Email Template Builder, review this information.

Users can insert an Email Template Builder template while using the Lightning email composer for:

Users can't insert an Email Template Builder template for:

- 1:1 Sales Cloud emails
- Case emails
- Docked Composer
- Email Global action
- Sales Engagement, using a cadence
- List Emails
- Experience Cloud sites
- Outlook or Gmail integrations

Internet Explorer 11 isn't supported.

Enhanced letterheads aren't supported.

There isn't any API support for Email Template Builder, and you can't create Email Template Builder email templates using the API. For example, if you use the API to update the HTML Value field, the value in Email Template Builder is out of sync.

Email Template Builder and Email Content Builder have these limits.

- 250 components per email template or email content record
- 100 components per region (component container)
- 10K characters for each component's property value

In the HTML Value field of the HTML component, clicking **Format** can push you over the character limit. In that case, you can't save your template. Undo the formatting or shorten the HTML and add another HTML block for the rest of the content.

### SEE ALSO:

[Email Template Builder](#)

[Guidelines for Using Email Template Builder](#)

[Enhanced Email for Account Engagement](#)

### EDITIONS

Available in: **Lightning Experience** for email templates created in Email Template Builder and Email Content Builder

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

Available in: Account Engagement Lightning App for all Account Engagement editions

## Select Who Can Work in Email Template Builder

To let other users create templates with Email Template Builder, give them the Access Drag-and-Drop Content Builder permission. Any user that can send can insert email templates made with Email Template Builder into an email or list email.

1. From Setup, in the Quick Find box, enter *Permission Sets*, and then select **Permission Sets**.
2. Create a permission set, and then select **System Permissions**.
3. Click **Edit**, choose the **Access Drag-and-Drop Content Builder** permission, and click **Save**.
4. If necessary, click **Manage Assignments** to assign the permission set to users.

### SEE ALSO:

[Email Template Builder](#)

[Create and Edit Email Templates in Email Template Builder](#)

[Use Email Template Builder Templates in Lightning Experience](#)

[Considerations for Using Email Template Builder](#)

[Guidelines for Using Email Template Builder](#)

[Enhanced Email for Account Engagement](#)

## Getting Around Email Template Builder

As you become familiar with Email Template Builder, use this information as your guide.

### EDITIONS

Available in: Lightning Experience for email templates created in Email Template Builder and Email Content Builder

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

Available in: Account Engagement Lightning App for all Account Engagement editions

### USER PERMISSIONS

To create permission sets:

- Manage Profiles and Permission Sets

To assign permission sets:

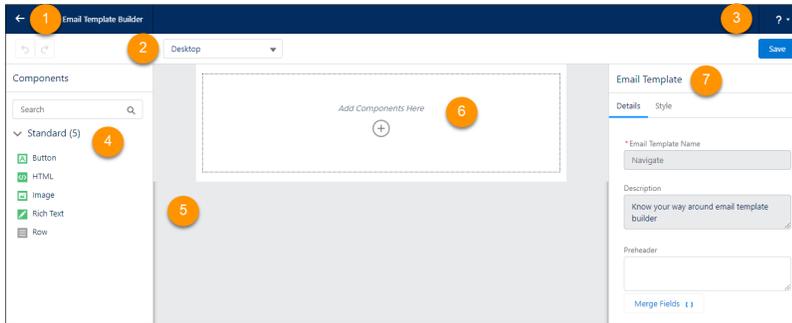
- Assign Permission Sets

### EDITIONS

Available in: Lightning Experience for email templates created in Email Template Builder and Email Content Builder

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

Available in: Account Engagement Lightning App for all Account Engagement editions



Review these parts of the email template builder.

- Back Button (1)—Use the Back button to return to Salesforce and email templates.
- Preview Mode (2)—Preview the template in different modes, such as desktop and phone.
- Salesforce Help (3)—Open the help menu to access Salesforce Help, videos, and other resources.
- Components Panel (4)—See the available components for your template.
- Canvas (5)—Use components to create your template on the canvas. To add a component to the canvas, drag it from the panel or click + to select.
- Default Row (6)—All components are placed in rows. This row is the default row for a new template. Add a component to it or create more rows.
- Property Panel (7)—The property panel shows what can be changed about the component. Change settings in both tabs. Style a component's properties in the Style tab.

## Create and Edit Email Templates in Email Template Builder

Use email templates to save time and standardize email sent by you or others in your organization.

1. Go to the Email Templates home.
2. Click **New Email Template**. Fill out the New Email Template window, and then click **Save**.
3. The next screen shows the email template details page for your new template. Click **Edit in Builder**.
4. Add a subject. To include merge fields in the subject, type them in manually.

 **Note:** You can't edit the subject in Email Template Builder.

5. The Email Template Builder appears.

### EDITIONS

Available in: Lightning Experience for email templates created in Email Template Builder and Email Content Builder

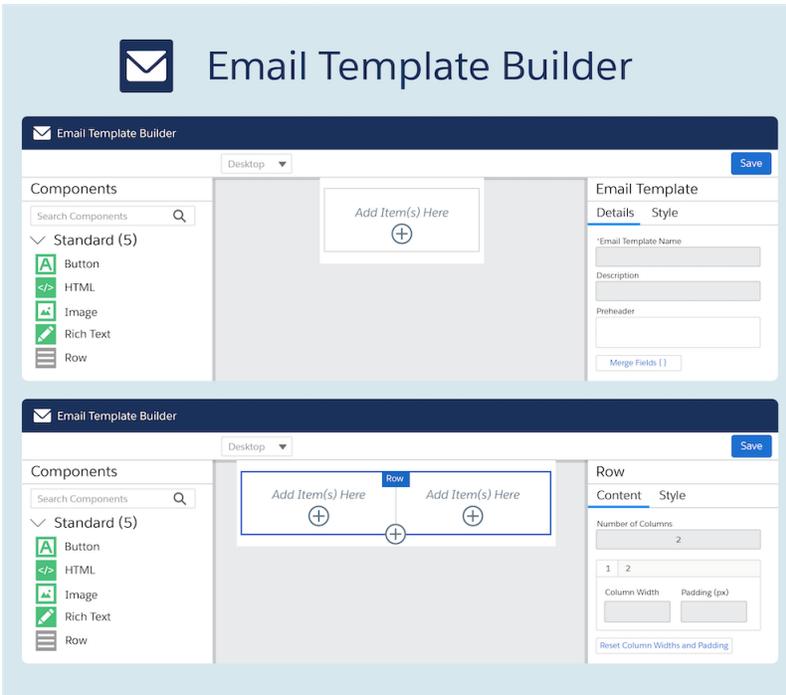
Available in: **Professional, Enterprise, Unlimited, Performance,** and **Developer** Editions.

Available in: Account Engagement Lightning App for all Account Engagement editions

### USER PERMISSIONS

To create and edit Email Template Builder templates:

- Access Drag-and-Drop Content Builder



6. Add components to the template, and customize them in the properties panel. Click **Save**, and then click the **Back** icon to return to the Email Template home page.

Now you can use the new template in an email or list email in Lightning Experience or in Account Engagement emails.

 **Note:** To see how your template looks, send it to yourself as a test.

#### SEE ALSO:

[Email Template Builder](#)

[Considerations for Using Email Template Builder](#)

[Guidelines for Using Email Template Builder](#)

[Enhanced Email for Account Engagement](#)

## Use Email Template Builder Templates in Lightning Experience

Anyone who can send an email can insert a public email template.

1. Start an email or list email.
2. In the email composer, click the **Template** icon.
3. Choose an Email Template Builder template.

SEE ALSO:

[Email Template Builder](#)

[Considerations for Using Email Template Builder](#)

[Guidelines for Using Email Template Builder](#)

[Enhanced Email for Account Engagement](#)

## Guidelines for Using Email Template Builder

Review these guidelines for using Email Template Builder.

### Active Content

You can't use active content in an HTML or Rich Text component. Active content doesn't appear correctly, and it can compromise your org's security.

Active content is a type of interactive, dynamic website content. This content includes items such as:

 **Note:** Microsoft Office (MSO) tags are allowed in HTML and Rich Text components.

- Programs such as Java and JavaScript
- Animated images
- ActiveX controls
- Streaming video and audio
- Embedded objects
- HTML comments

### EDITIONS

Available in: Lightning Experience for email templates created in Email Template Builder and Email Content Builder

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

Available in: Account Engagement Lightning App for all Account Engagement editions

### USER PERMISSIONS

To send email:

- Send Email permission and access to the record the email is sent from

### EDITIONS

Available in: Lightning Experience for email templates created in Email Template Builder and Email Content Builder

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

Available in: Account Engagement Lightning App for all Account Engagement editions

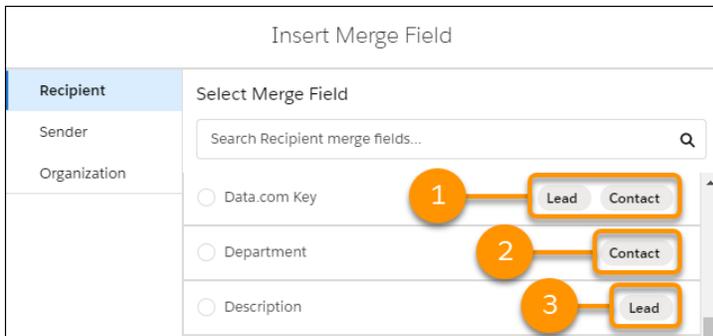
## Merge Fields

The merge field picker doesn't work when editing a rich text editor component in Source Mode. However, you can manually type merge fields to add them.

There's no merge field picker for the subject line, but you can manually type merge fields to add them.

The `<style>` tag isn't supported in rich text fields that also have merge fields. If you have code that handles sending email and inserting email templates, keep this difference in mind.

 **Note:** Not every merge field can be used with every email recipient. For example, the `{{{Recipient.Department}}}` merge field can be used with contacts only, while no recipient merge fields can be used when a user is the recipient.



The Insert Merge Field window shows you which fields work with both Lead and Contact (1), with Contact only (2), or with Lead only (3).

## Images

To insert a Salesforce File as an image in a component, use the **Select From Files** button. Images are converted from Content Document links to Content Asset links when you save the template.

 **Note:** You can't copy the image address link or use the public link.

The image upload selector doesn't work when editing a rich text editor component in Source Mode.

The .SVG image type isn't supported.

When using the `src` attribute to add an image in an HTML `<img>` tag, start the URL with `https://`.

## Editing Templates

In the email composer, you can choose to **Save as new template**. The new template is a Lightning email template, not an Email Template Builder template.

On the Email Templates home page, you can clone an existing Email Template Builder template. If the user has the Access Drag-and-Drop Content Builder user permission, the cloned template is an Email Template Builder template. If the user doesn't have the Access Drag-and-Drop Content Builder user permission, the cloned template is a Lightning email template.

After a template is edited in Email Template Builder, it can only be edited in Email Template Builder. However, unlocked sections of the template can be edited in the email and list email composers after the template is inserted.

## Users with an Account Engagement (Pardot) License

To use CMS when choosing an image in a component:

- A default channel must be selected in setup.
- The user must be a contributor to a CMS workspace that is associated with the Lightning Content Builder channel.
- The image size can be up to 25 MB.

To insert an Account Engagement file into a component, manually input the public image URL.

## General

Salesforce discourages customers from entering raw personally identifiable (PII) or privacy violation data in any email template or email content. Avoid using free-form fields for private data, especially on the free form fields like RTE and HTML Editor. Instead, include customer data by using merge fields.

Responsive rendering is triggered when the width is less than 320 px. At less than 320 px, the template renders as if it's in phone mode and columns in the same row are stacked.

- A docked email composer shows a template in phone mode.
- A popped-out email composer shows a template in desktop mode.

To see keyboard shortcuts and accessibility options in the rich text editor, press **Alt + 0** (Windows) or **Option + 0** (Mac).

Having two instances of Email Template Builder open in two tabs can result in unsaved or overwritten changes. If more than one user edits the same Email Template Builder template at the same time, changes can be overwritten \*

When using an iPad, use the **+** icon to add components instead of dragging them from the components panel.

Forwarding an email that uses an Email Template Builder template breaks responsiveness in some email clients, such as Gmail.

To assign no color in the property panel, remove the hexadecimal value.

### SEE ALSO:

[Email Template Builder](#)

[Considerations for Using Email Template Builder](#)

[Enhanced Email for Account Engagement](#)

[Using Email Templates and Email Content Together](#)

## 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.

### [Considerations for Sending Classic Email Templates in Salesforce Classic](#)

Before you send Classic email templates, consider a few key points.

### [Types of Classic Email Templates](#)

In Salesforce Classic, you can create four different types of email templates: text, HTML with Classic 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.

### [Add an Attachment to an Email Template in Salesforce Classic](#)

To attach a file to every email that uses an email template in Salesforce Classic, add the attachment to the template. Attachments in mass emails are sent as links rather than as files.

### [Create Custom HTML Email Templates in Salesforce Classic](#)

You can create custom HTML email templates without using Classic 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. Salesforce allows you to use style tags to add external or internal images to an email.

### [HTML Classic 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.

### [Create and Edit Email Template Folders in Salesforce Classic](#)

Create email template folders and set their visibility so that users have the correct access level.

## 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**

## 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.

### 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:

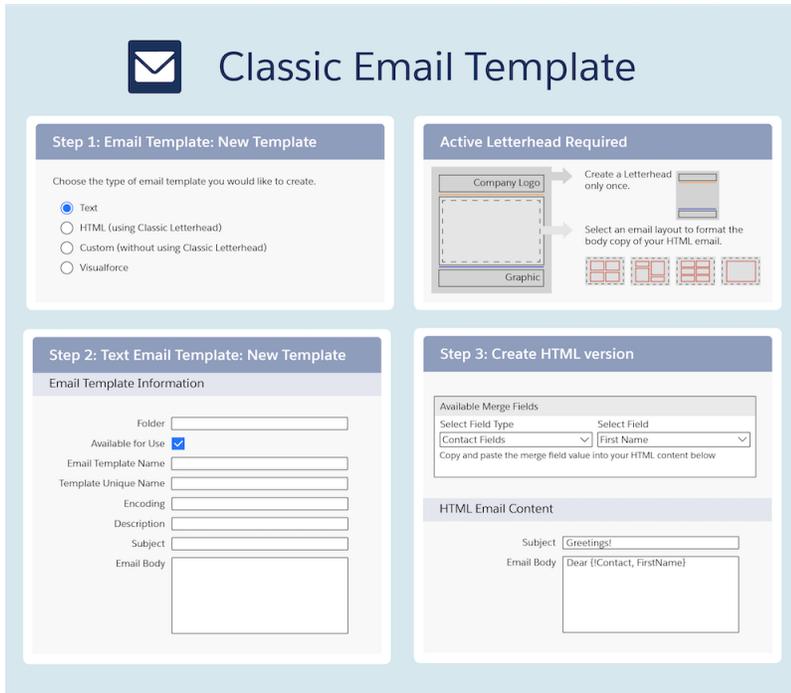
- Edit HTML Templates

To create or change Visualforce email templates:

- Customize Application

To create or change public email template folders:

- Manage Public Classic Email Templates



## 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 *Classic 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 Classic 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 Classic Email 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**.

 **Note:** Partner portal users can access public email templates.

## 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 leave the text-only version blank, the text-only version is generated automatically when you edit the HTML version.

- 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.

- 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](#)

*Knowledge Article:* [Delete email templates in the Salesforce Classic UI](#)

## 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're 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. Choose one of these options.
  - 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 an email template name.
7. Enter a description for the template. Both the template name and the description are for your internal use only.
8. Click **Save**.

## Considerations for Sending Classic Email Templates in Salesforce Classic

Before you send Classic email templates, consider a few key points.

- 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.

### 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:

- Manage Public Classic Email Templates

### EDITIONS

Available in: Salesforce Classic

Available in: **All Editions** except **Essentials**.

- To reduce the overall load time for the merge field dropdown, grant users the View Setup and Configuration permission or delete unnecessary custom fields from your org.

## Types of Classic Email Templates

In Salesforce Classic, you can create four different types of email templates: text, HTML with Classic 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 Classic 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 HTML Classic 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 Classic Letterhead. You must 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:

- Manage Public Classic Email Templates

## 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're using a free org, you can have up to 500 email templates, of any kind, in that org.

1. Choose one of these options.
  - 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 an email template name.

7. If necessary, change the **Template Unique Name**.

 **Note:** 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 the 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**.

SEE ALSO:

[Email Templates in Salesforce Classic](#)

### 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:

- **Manage Public Classic Email Templates**

## Add an Attachment to an Email Template in Salesforce Classic

To attach a file to every email that uses an email template in Salesforce Classic, add the attachment to the template. Attachments in mass emails are sent as links rather than as files.

 **Note:** Text email templates can be used, but not created, in Lightning Experience.

1. Choose one of these options.
  - If you have permission to edit public templates, from Setup, enter *Email Templates* in the **Quick Find** box, then select **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. 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.

### 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:

- Manage Public Classic Email Templates

## Create Custom HTML Email Templates in Salesforce Classic

You can create custom HTML email templates without using Classic Letterhead. If you don't know HTML, you can paste HTML code into your template.

 **Note:** If you're using a free org, you can have up to 500 email templates, of any kind, in that org.

HTML email templates can be used, but not created, in Lightning Experience.

1. Choose one of these options.
  - 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 Classic 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 an 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 the 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. Enter a subject for the message.
11. Click **Next**.
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:

```

```

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.

### 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:

- Manage Public Classic Email Templates

 **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 HTML Classic Letterhead Email Templates in Salesforce Classic](#)

[Create Visualforce Email Templates in Salesforce Classic](#)

[Add Images to Email Templates in Salesforce Classic](#)

## Add Images to Email Templates in Salesforce Classic

You can include images, such as logos, in your custom HTML and Visualforce email templates. Salesforce allows you to use style tags to add external or internal images to an email.

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 (using Classic 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 `<img>`, using the image's URL address, where you want to insert the image in the email template.

 **Note:** You can also use the URL of an external website, such as ``. However, if an image is stored in your org, you have more control over it.

Use the `style` attribute in HTML to add internal and external images to email templates whose HTML elements can be edited.

### 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

### Example: Custom (without Using Classic Letterhead) Email Template

Custom (without using Classic Letterhead)

```

```

#### Visualforce Email Template

```
<apex:image id="Logo"
value="https://yourInstance.salesforce.com/servlet/servlet.ImageServer?
id=015D0000000Dpwc&oid=00DD0000000FHgG&lastMod=1270576568000" />
```

#### Custom HTML Email Template

This example adds an image as the background on an HTML element.

```
<td style="height:33; background-image:url('https://yourInstance.salesforce.com/
/servlet/servlet.ImageServer?id=015D0000000Dpwc&oid=00DD0000000FHgG&lastMod=1270576568000">
```

SEE ALSO:

[Create Classic Letterheads for Email Templates](#)

## HTML Classic 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 *Classic Letterheads* in the **Quick Find** box, then select **Classic Letterheads**.

From the Classic 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:** HTML Classic Letterhead email templates can be used, but not created, in Lightning Experience.

[Create Classic Letterheads for Email Templates](#)

Create Classic letterheads as the basis for a consistent look for your HTML email templates. Make letterheads available organization-wide so other users can use them in their email templates.

[Create HTML Classic Letterhead Email Templates in Salesforce Classic](#)

You can create HTML-based email templates using Classic letterhead. You can't change the layout in an existing template, but you can update the Classic letterhead associated with the template. To create a letterhead email template, you must have at least one active Classic 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 Classic Letterheads for Email Templates

Create Classic letterheads as the basis for a consistent look for your HTML email templates. Make letterheads available organization-wide so other users can use 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.

To create an HTML email template that contains the settings in your letterhead, see [Create HTML Classic Letterhead Email Templates in Salesforce Classic](#) on page 921.

1. From Setup, enter *Classic Letterheads* in the Quick Find box, then select **Classic Letterheads**.
2. Click **Next** if an introductory page appears.
3. 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.
4. Specify letterhead properties.
  - a. Check **Available For Use** if you want users to be able to use the new letterhead immediately.
  - b. Enter a `Letterhead Label`. The label is used to refer to the letterhead on user interface pages.
  - c. If necessary, change the `Letterhead Unique Name`. This name is 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.
  - d. Enter a description for this letterhead. The name and description fields are for internal use only, to describe the letterhead to other users.
  - e. Click **Save**. The letterhead detail page appears.
5. Set the attributes for the letterhead.
  - a. Click **Edit Background Color**, and enter a color for the background of your letterhead. Click the color picker button to choose a color.
  - b. Click **Edit Header Properties**, and select the color, alignment, and height for the top section of the letterhead.
  - c. Click **Select Logo** to include an image of your company logo in the top or bottom section of the letterhead.
 

 **Note:** Upload the logo image to the Documents tab before you add it to the letterhead. Mark the document 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 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.
  - d. Click **Remove Logo** to delete the image from the letterhead.
  - e. 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.

### 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

- f. Click **Edit Body Colors**, and enter the background color for the main body of your letterhead.
  - g. 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.
  - h. Click **Edit Footer Properties**, and select a color, alignment, and height for the bottom section of the letterhead.
  - i. Click **Edit Bottom Line**, and select a color and height of a bottom horizontal line. Click the color picker button to choose a color.
6. Optionally, click **Preview** to display the letterhead in a separate browser window.
  7. Click **Save**.

 **Note:** HTML Classic Letterhead email templates can't be created in Lightning Experience. However, existing Classic Letterhead email templates can be used in Lightning Experience.

#### SEE ALSO:

[Create Custom HTML Email Templates in Salesforce Classic](#)

## Create HTML Classic Letterhead Email Templates in Salesforce Classic

You can create HTML-based email templates using Classic letterhead. You can't change the layout in an existing template, but you can update the Classic letterhead associated with the template. To create a letterhead email template, you must have at least one active Classic letterhead.

 **Note:** If you're using a free org, you can have up to 500 email templates, of any kind, in that org.

To create an HTML Classic Letterhead email template:

1. Choose one of these options.
  - If you have permission to edit public templates, from Setup, enter *Classic 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 Classic 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 an 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 *Classic 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:

- Manage Public Classic Email Templates

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` dropdown 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. Enter a subject for the email you send. The subject can be edited later, when using the template.
13. Click **Next**.
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 and Custom 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 Classic 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, 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.

### [Use Visualforce Email Templates with Guest Users](#)

Protect access to your company's data when you send emails that use Visualforce Classic email templates to guest users. These templates can be used with Process Builder, Workflow Builder, and Apex calls.

### [Modify a Visualforce Email Template for Guest Users](#)

Protect access to your company's data when you send emails that use Visualforce Classic email templates to guest users. These templates can be used with Process Builder, Workflow Builder, and Apex calls.

### [Considerations for Using Visualforce Email Templates with Guest Users](#)

Review these considerations when using Visualforce Classic email templates to send emails to guest users.

### [Use Visualforce Classic Email Templates in Automation](#)

Workflows and other automations are executed in a system context. User-level limitations don't apply when the automations use Custom, HTML, or Text Classic email templates. A user's visibility to fields and records to apply to Visualforce Classic email templates.

### EDITIONS

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

Available in: **Essentials, 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

## Create Visualforce Email Templates in Salesforce Classic

Use the Visualforce programming language to create targeted and personalized email content.

 **Note:** If you're using a free org, you can have up to 500 email templates, of any kind, in that org.

1. Choose one of these options.
  - 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 *Visualforce* 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 an 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:** 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 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, 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.

### 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:

- Manage Public Classic Email Templates

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.

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.

 **Note:** The Translation Workbench is required to translate email templates.

 **Important:** You can't send a mass email using a Visualforce email template.

#### SEE ALSO:

- [Use Merge Fields for Visualforce Email Templates in Salesforce Classic](#)
- [Manage Version Settings for Visualforce Email Templates in Salesforce Classic](#)
- [Use Visualforce Email Templates with Guest Users](#)
- [Modify a Visualforce Email Template for Guest Users](#)
- [Create HTML Classic 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.
- When `renderUsingSystemContextWithoutSharing="True"`, the email template runs in system mode, which bypasses user permissions, field-level security, and organization-wide defaults. Be careful when using this setting so that you don't inadvertently expose sensitive data. Before using this setting, assess the impact of the guest security policy and, if necessary, update the Visualforce email templates instead.
- Because the merge field Case Thread Token is supported in Lightning Experience only, you can't use it in a Visualforce email template.

### 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 *majorNumber.minorNumber.patchNumber* (for example, 2.1.3). The major and minor numbers increase to a chosen value during every major release. The *patchNumber* 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.

1. Choose one of these options.
  - 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. To specify the Salesforce API and Visualforce version for the template, select the **Version** of the Salesforce API. The API version is also the version of Visualforce used with this template.
5. To configure the package version settings for the template, 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.
6. 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.
- 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](#)

### 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**

## Use Visualforce Email Templates with Guest Users

Protect access to your company's data when you send emails that use Visualforce Classic email templates to guest users. These templates can be used with Process Builder, Workflow Builder, and Apex calls.

In Spring '20, Salesforce introduced a security policy that affects Visualforce email templates that are used for emails sent to guest users in Experience Cloud sites.

Emails that use Visualforce email templates send information based on a user's access to Salesforce data. But because data access for guest users is limited in Salesforce, the templates don't work after you apply the security change.

Data access is divided into two main categories, or *contexts*.

- *System Context*—A user's permissions are ignored, and the request executes irrespective of permissions. These permissions can include the keywords *with sharing*, *without sharing*, and *inherited sharing*.

If a Visualforce email template is requested from a feature running in system context without sharing, the email is rendered in system context.

- *User Context*—All the user's permissions and access settings are followed.

If a Visualforce email template is sent from any other context, the email is rendered in user context.

For more information on context, see the *Apex Developer Guide*.

To ensure that a Visualforce email template runs in system context and is visible to guest users, add the `renderUsingSystemContextWithoutSharing="True"` attribute to the `emailTemplate` tag. Setting `renderUsingSystemContextWithoutSharing="True"` doesn't override existing security settings for email object visibility. For example, to let a partner site member see User objects from a customer site, add the partner site member to the customer site and set `renderUsingSystemContextWithoutSharing="True"`.

 **Warning:** When `renderUsingSystemContextWithoutSharing="True"`, the email template runs in system mode, which bypasses user permissions, field-level security, and organization-wide defaults. Be careful when using this setting so that you don't inadvertently expose sensitive data. Before using this setting, assess the impact of the guest security policy and, if necessary, update the Visualforce email templates instead.

If the security policy changed a guest user's access to email templates, update the template's context wherever a guest user can generate an email.

- When using Apex's Messaging Class, ensure that your Apex class has the *without sharing* keyword in the definition. This keyword is required when you're sending an email directly or from an Apex trigger.
- When using a Flow, ensure that you invoke it from an Apex Class that has the *without sharing* keyword, or from Process Builder.

No updates are needed if one of these features is used to trigger an email for a guest user:

- Process Builder
- Workflows

 **Note:** Classic Visualforce email templates must be edited in Salesforce Classic, but they can be used in Lightning Experience with Process Builder, Workflow Builder, and Apex calls.

SEE ALSO:

[Modify a Visualforce Email Template for Guest Users](#)

### EDITIONS

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

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

## Modify a Visualforce Email Template for Guest Users

Protect access to your company's data when you send emails that use Visualforce Classic email templates to guest users. These templates can be used with Process Builder, Workflow Builder, and Apex calls.

In Summer '20, Salesforce introduced a security policy that affects Visualforce email templates used to send emails to guest users in Experience Cloud sites.

 **Note:** Classic Visualforce email templates must be edited in Salesforce Classic, but they can be used in Lightning Experience with Process Builder, Workflow Builder, and Apex calls.

Modify each Visualforce email template so that emails are sent correctly to all users, including guest users.

1. Add the Author Apex user permission.
  - a. From Setup, enter *Profiles* in the **Quick Find** box, then select **Profiles**.
  - b. Edit an existing profile or create one.
  - c. In the **Administrative Permissions** section, select *Author Apex*.
2. Edit a Visualforce email template.
  - a. In Setup, enter *Classic* in the **Quick Find** box, then select **Classic Email Templates**.
  - b. Click the name of a Visualforce type template.
  - c. Click **Edit Template**.
  - d. Add the system context attribute to the emailTemplate tag:

```
renderUsingSystemContextWithoutSharing="True"
```

 **Warning:** When `renderUsingSystemContextWithoutSharing="True"`, the email template runs in system mode, which bypasses user permissions, field-level security, and organization-wide defaults. Be careful when using this setting so that you don't inadvertently expose sensitive data. Before using this setting, assess the impact of the guest security policy and, if necessary, update the Visualforce email templates instead.

- e. Click **Save**.

 **Example:**

```
<essaging:emailTemplate renderUsingSystemContextWithoutSharing="true" recipientType=
  <essaging:plainTextEmailBody >
    Congratulations {!relatedTo.name} with email {!relatedTo.email}!
    This is your new Visualforce Email Template.
    {!recipient.name}
  </essaging:plainTextEmailBody>
</essaging:emailTemplate>
```

SEE ALSO:

[Use Visualforce Email Templates with Guest Users](#)

### EDITIONS

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

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

### USER PERMISSIONS

To create or change Classic Visualforce email templates:

- Author Apex

To create or change Visualforce email templates:

- Customize Application

To create or change public email template folders:

- Manage Public Classic Email Templates

## Considerations for Using Visualforce Email Templates with Guest Users

Review these considerations when using Visualforce Classic email templates to send emails to guest users.

- When `renderUsingSystemContextWithoutSharing="True"`, the email template runs in system mode, which bypasses user permissions, field-level security, and organization-wide defaults. Be careful when using this setting so that you don't inadvertently expose sensitive data. Before using this setting, assess the impact of the guest security policy and, if necessary, update the Visualforce email templates instead.
- Sending a test email using a Visualforce email template doesn't accurately represent the email that a guest user receives. Instead, access your Experience Cloud site as a guest user and initiate sending an email the way a guest user does.

Imagine that you're testing an email template to recover passwords. Create an Experience Cloud site user with your email address. Then go to the site as a guest user, click the **Forgot Password?** link, and enter the name of the user you just set up.

- When sending a Visualforce email template to a guest user, these global variable values have different values.

Global Variable	Expected Output for Guest Users
<code>\$Api.Session_ID</code>	NULL_SESSION_ID
<code>\$Cache.Session</code>	Session not found - Session Cache not supported

- When sending a Visualforce email template to a guest user, checking an object's accessibility using `$ObjectType` returns these output values. The returned value is false even though you can access that object in system context.

If you know that you have access, ignore the returned value.

<code>\$ObjectType</code> Global Variable Attribute	Expected Value for Guest Users
accessible	false
createable	false
deletable	false
mergeable	false
queryable	false
searchable	false
undeletable	false
updateable	false

- Checking the value of a permission (for example, using `$Permission.canSeeExecutiveData`) always returns false. The returned value matches what Apex returns when you check a permission in system context.

### EDITIONS

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

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

## Use Visualforce Classic Email Templates in Automation

Workflows and other automations are executed in a system context. User-level limitations don't apply when the automations use Custom, HTML, or Text Classic email templates. A user's visibility to fields and records to apply to Visualforce Classic email templates.

The result of an automation that uses a Classic email template with merge fields differs when the template is a Visualforce Classic email template.

In the following scenarios, assume that the org has an Admin user and a standard user.

### Scenario 1: Hidden Fields

Imagine that the Admin has hidden a field in an entity from the standard user. Two Classic email templates—one Visualforce and one HTML—have a merge field referencing the hidden field.

When the standard user inserts either Classic email template into the email composer, the field value isn't substituted. As expected, the merge field evaluates to a blank.

Now imagine a workflow rule. It's configured to send email alerts using a Classic email template. The alert fires when certain account fields are edited. If the standard user edits a field and triggers the alert, an email is sent using the template.

- When the workflow specifies the Visualforce Classic email template, the field value evaluates to a blank.
- When the workflow specifies the HTML Classic email template, the field value is substituted.

### Scenario 2: Hidden Records

Imagine that the admin has changed the org's sharing settings. They're set to private for records: only the record owner or the admin can access a record.

Imagine a workflow configured to fire an email when a record owner changes. The alert uses a Classic email template that includes the record owner's info and name.

When the standard user modifies a record and updates the owner field, the user loses access to that record. The change also triggers the email alert Workflow.

- When the workflow specifies the Visualforce Classic email template, the email isn't sent and the user is redirected to an error page. The Visualforce template retrieves the merge field value from the database, not the cache.
- When the workflow specifies the HTML Classic email template, the email is sent and the owner field shows the new value. The HTML template resolves the merge field even though the user lost access to the record.

#### EDITIONS

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

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

Mass email not available in: **Personal, Contact Manager, and Group** Editions

## Create and Edit Email Template Folders in Salesforce Classic

Create email template folders and set their visibility so that users have the correct access level.

This topic describes how to create email template folders and set their visibility in Salesforce Classic. For information on folder sharing for email templates in Lightning Experience, see [Enable Folders and Enhanced Sharing for Email Templates](#).

1. From Setup, in the Quick Find box, enter *Classic Email Templates*, and then click **Classic Email Templates**.
2. Click **Create New Folder**.
3. Enter an `Email Template Folder Label`. The label is used to refer to the folder on user interface pages.
4. Choose a `Public Folder Access` option. Select Read/Write if you want users to be able to change the folder contents. A Read Only folder can be visible to users but they can't change its contents.
5. Select one or more email templates and click **Add** to store them in the new folder.
6. Choose a folder visibility option:
  - `This folder is accessible by all users` gives folder access to all users in your organization.
  - `This folder is hidden from all users` makes the folder private.
  - `This folder is accessible only by the following users` allows you to grant access to a desired set of users. The sets of users vary by edition and whether your organization has territory management. Choose a set of users from the `Search` dropdown list. Then select the desired value from the `Available for Sharing` list and click **Add** to move the value to the `Shared To` list.

When you share a folder with a group, managers of the group members have no access to the folder unless those managers are also members of the group.

7. Click **Save**.

Email template folders can only contain email templates. You can create new email templates in the folder or move existing email templates on their Edit page.

 **Note:** Email templates that are used by Web-to-Case, Web-to-Lead, assignment rules, or escalation rules must be marked as "Available for Use."

SEE ALSO:

[Considerations for Email Template Folders and Sharing](#)

[Considerations for Using Public and Private Email Templates in Lightning Experience](#)

### 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, edit, and delete public email template folders in Salesforce Classic:

- [Manage Public Classic Email Templates](#)

# Sales Dialer

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Use Sales 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 Sales Dialer](#)

Dialer allows users to access telephony features directly in Salesforce.

## 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 (not including Puerto Rico) and Canada only.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in:

**Essentials, Professional, Enterprise, Performance,** and **Unlimited** Editions

Sales Dialer is available for an additional cost as an add-on license.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in:

**Essentials, Professional, Enterprise, Performance,** and **Unlimited** Editions

Sales Dialer is available for an additional cost as an add-on license.

The screenshot displays the Salesforce interface during a call. At the top, the navigation bar includes 'Sales', 'Accounts', 'Calendar', 'Cases', 'Chatter', 'Contacts', 'Home', 'Leads', 'News', 'Opportunities', and 'Tasks'. Below this, the 'OPPORTUNITY 300 Widgets' header is visible. The main content area shows a progress bar with steps: 'Value Propos...', 'Id. Decision ...', 'Perception A...', 'Proposal/Pric...', and 'Negotiation'. Below the progress bar are tabs for 'ACTIVITY', 'CHATTER', and 'DETAILS'. A call panel is open, showing a call with 'Jeff Moss' (AWC) and a duration of '1:34'. The panel includes a 'Call' header, a 'Log a Call' button, and a 'New Task' button. The 'Assigned To' field is set to 'Dan Perkins', and the 'Related To' field is set to '300 Widgets'. A 'Save' button is located at the bottom right of the call panel. The background shows the 'Opportunities' page with a 'More Steps' button and a 'Yesterday' dropdown menu.

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.

When you call a landline number that's busy, the call ends without ringing or a busy signal.

 **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. A call log is created if the number dialed is related to an existing record. If it isn't, a task is created, but a call log related to a record is not.

You can also add more details manually after a call has ended.

Log Call  
Jeff Moss

Subject  
Called Jeff Moss

Comments  
Meeting with exec team Monday  
- Prepared to negotiate price point after meeting

Name  
Jeff Moss

Related To  
300 Widgets

Cancel Save

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.

Call

Jeff Moss  
AWC  
+1 (415) 632-8841

RECENT ACTIVITIES

- Get approval on figures Sep 2
- Follow up about deal figure Sep 5
- Called Jeff Moss Jul 20

Dismiss Answer

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.

With the voicemail drop feature, you can also record messages to leave when you make a call and get someone else's voicemail. For best results, we recommend reps start their message as soon as the recording begins. Messages can be up to 1 minute long. For now, reps can have 10 voicemail drop recordings.

For information about setting up Sales Dialer, see [Set Up Sales 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.

[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.

[Sales 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 Sales 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.

 **Note:** After assigning yourself a Dialer number, you can enter a unique custom number under **Phone Number Settings**. This allows you to display a separate number when making calls.

Inbound calls made to the custom number go directly to the mobile or business line, not through Sales Dialer.

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](#)

[Sales Dialer Best Practices](#)

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in:

**Essentials, Professional, Enterprise, Performance, and Unlimited** Editions

Sales 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

To assign a Dialer number:

- 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](#)

[Sales Dialer Best Practices](#)

## Sales 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 with Sales Cloud and Service Cloud in: **Essentials, Professional, Enterprise, Performance,** and **Unlimited** Editions

Sales 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

### EDITIONS

Available in: Lightning Experience

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

Sales 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 Sales 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 Sales Dialer.
3. [Enable Sales 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 Sales Dialer. Enable the feature from the Local Presence page in Setup. Dialer users can then select Local Presence under their personal settings.
7. [Enable Call Monitoring](#)  
Use Call Monitoring to coach sales reps using Sales 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 with Sales Cloud and Service Cloud in:  
**Essentials, Professional, Enterprise, Performance,** and **Unlimited** Editions

Sales 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 [Sales 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.

If calls continue in inactive tabs for longer than your org's session timeout limit, they aren't logged properly. Notes made on the call may also be lost. If your org automatically logs out users after a short time (such as 15 minutes), encourage reps to keep the tab active or modify your org's session security settings. From Setup, enter *Session Settings* in the Quick Find box. Then select **Session Settings** and make updates.

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](#).

SEE ALSO:

[Knowledge Article: Upcoming required changes for Sales Dialer](#)

### EDITIONS

Available in: Lightning Experience

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

Sales 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 Sales Dialer.

### General Limitations

- Dialer features are available in Lightning Experience on the desktop only.
- No support in Experience Cloud sites.
- Users can now store up to 20 voicemail messages in Salesforce. Voicemail messages are limited to two minutes. The messages are saved as files in Salesforce, and they count toward your files storage quota.
- Call Monitoring is not supported in Salesforce Essentials.
- Outgoing calls are supported to the U.S. and Canada only. Puerto Rico is not supported.
- The Local Presence feature is only available in the U.S. and isn't available in Canada.
- Permission set groups aren't supported for Dialer permissions. Assign Dialer and Call Monitoring permission sets without using permission set groups.
- Dialer users can't have Service Cloud Voice permission sets or be part of a Salesforce call center.
- Phone numbers in dashboards can't be directly called with Dialer.
- The utility bar supports only one Phone item at a time.
- Users can't pop out (or pop in) the call panel from the utility bar during an active call.
- When users call a landline number that's busy, Dialer ends the call without ringing or a busy signal.
- Deactivated call result values aren't removed from the call panel. Delete any unneeded call result values instead.
- Users need the "Edit Task" permission to log calls. This permission isn't automatically included with some profiles, so users with those profiles can make calls, but those calls aren't logged.
- Users need a Dialer Inbound license to assign a number or access personal Dialer settings from the call panel.
- If you're creating a sandbox from an org that already has voice calls, voice call records and voice call recordings are not copied over. To use Dialer in sandbox, you must enable it from Setup again.
- It isn't possible to make or receive live calls with Dialer in sandbox environments. You can make test calls and test automation that occurs after a call is made, such as the log a call task. For more details, see "Test Dialer Features in Sandbox."
- The records that can be added to call lists include leads, accounts, person accounts, and contacts. Call lists use the standard Phone field for these records.
- To use voicemail greetings, password protection can't be required by default for content deliveries. From Setup, enter Content Deliveries in the Quick Find box, then select Content Deliveries. Ensure that Password protection is required is not selected. This feature is available only to users with outbound and inbound calling access.
- Dialer users with the voicemail drop feature can store up to 10 prerecorded voicemail messages.
- With call monitoring, you can listen to only one sales rep at a time, and only outbound calls are monitored. You can't monitor calls that your sales reps receive. Monitored calls use double the minutes of a regular call, counting the call time for both the rep and manager.
- Dialer respects the **Do Not Call** field, and records with the field selected have one-click calling disabled.
- Call recordings are saved as files in Salesforce. An hour of recording takes up roughly 15 MB of storage space, and the same sharing rules apply to recordings as other files in Salesforce. Admins can delete call recordings from the Recording Management page in Setup.
- If required by law, users must notify the call recipient of call monitoring and/or recording and stop monitoring and/or recording upon request.

### EDITIONS

Available in: Lightning Experience

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

Sales Dialer is available for an additional cost as an add-on license.

- Dialer doesn't support Enhanced 911. Location information is not automatically shared over 911 calls.
- You can use Sales Dialer to make calls to or receive calls from the U.S. and Canada only.

## 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.
- Before a user can use a custom phone number, the user must enter a provided code to verify it. Phone numbers that use a directory can't be verified.
- The same custom phone number can't be used for multiple users.
- Phone numbers provided by Salesforce can be used only in association with Sales Dialer.

## Enable Sales Dialer

Turn on Dialer from the Dialer Settings page in Lightning Experience.

1. From Setup, enter *Dialer* in the *Quick Find* box, then select **Dialer Settings**.
2. Enable Dialer.

Optionally, enable personal voicemail, prioritized call lists, voicemail drop, and other settings for your org as well.

 **Note:** You can turn on and manage more features under the **Dialer** node in Setup. Depending on your org, this may include local presence, call result tracking, and more.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in:

**Essentials, Professional, Enterprise, Performance,** and **Unlimited** Editions

Sales 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 Items tab, click **Add Utility Item** and select **Dialer**.
4. On the 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, from the App Launcher, find and open the app that has Sales Dialer enabled.

## Assign the Dialer Permission Set to Users

Assign the Dialer licenses to users from Setup.

Permission set groups aren't supported for Dialer permissions. Assign Dialer and Call Monitoring permission sets without using permission set groups.

Dialer users can't have Service Cloud Voice permission sets or be part of a Salesforce call center.

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.

-  **Note:** Assigning the permission set automatically assigns a corresponding permission set license. However, if you wish to remove Dialer licenses from a user, you need to remove both the permission set and the permission set license to make the feature licenses available to reassign.

### EDITIONS

Available in: Lightning Experience

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

Sales 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 with Sales Cloud and Service Cloud in:  
**Essentials, Professional, Enterprise, Performance,** and **Unlimited** Editions

Sales 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 Sales Dialer. Enable the feature from the Local Presence page in Setup. Dialer users can then select Local Presence under their personal settings.

Users need both Dialer Inbound and Dialer Outbound licenses to use Local Presence.

 **Note:** Local Presence is for use only by customers in the US, and is intended to be used to dial only US numbers.

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 if the initial caller is no longer with your organization.

To use Local Presence, users must select it as the number that appears for outgoing calls from their personal settings. The option is available from the **Dialer Settings** page in Personal Setup or My Settings.

## Enable Call Monitoring

Use Call Monitoring to coach sales reps using Sales 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.

 **Note:** You can only monitor users that are one level below you in the role hierarchy.

You can listen to only one sales rep at a time, and only outbound calls are monitored. You can't monitor calls that your sales reps receive. Monitored calls use double the minutes of a regular call, counting the call time for both the rep and manager.

If required by law, users must notify the call recipient of call monitoring and/or recording and stop monitoring and/or recording upon request.

Call Monitoring is not supported in Salesforce Essentials.

Permission set groups aren't supported for Dialer permissions. Assign Dialer and Call Monitoring permission sets without using permission set groups.

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**.
5. Enter a name for the permission set.  
Naming it *Call Monitoring* makes it easy to identify.
6. Click **Save**.

### EDITIONS

Available in: Lightning Experience

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

Sales 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: **Professional, Enterprise, Performance,** and **Unlimited** Editions

Sales Dialer is available for an additional cost as an add-on license.

### USER PERMISSIONS

To enable Dialer features:

- Customize Application

To enable Call Monitoring:

- View Setup and Configuration, View Roles and Role Hierarchy

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 Find box, 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 the usage data.

Salesforce admins receive an email when their org is approaching the end of their available Lightning Dialer minutes for the current month. Another email is sent when there are no available minutes and reps are unable to make calls.

### [Guard Outgoing Calls Against Filters](#)

Help your teams reach their customers with a few tips, including protocols that validate outbound calls from your teams.

### [Release a Dialer Number](#)

Release a number from the Number Management page in Setup.

### [Remove Dialer Licenses from Users](#)

Make Dialer licenses available for others by removing the permission sets and the permission set licenses from existing users.

### [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.

### [Sales 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 with Sales Cloud and Service Cloud in:  
**Essentials, Professional, Enterprise, Performance,**  
and **Unlimited** Editions

Sales Dialer is available for an additional cost as an add-on license.

## Guard Outgoing Calls Against Filters

Help your teams reach their customers with a few tips, including protocols that validate outbound calls from your teams.

Protect your teams' calls from being marked as spam with the following recommendations:

- Register all numbers through [Free Caller Registry](#) in order to submit business information directly to major US wireless providers.
- Use STIR/SHAKEN protocols to validate your teams' outbound calls. From Setup, enter **Trusted Calling** in the Quick Find box, and select Trusted Calling. Enter your company's information and submit it to Twilio. It can take from 24 to 48 hours for Twilio to review your submission.

### EDITIONS

Available in: Lightning Experience

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

Sales Dialer is available for an additional cost as an add-on license.

The screenshot shows the Salesforce Setup interface for 'Trusted Calling'. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar contains 'Trusted Calling'. The left sidebar shows 'Feature Settings' > 'Dialer' > 'Trusted Calling'. The main content area has a 'SETUP Trusted Calling' header. Below it is the 'STIR/SHAKEN' section with explanatory text. The 'Business Information' section contains four form fields:

- \* Legal Business Name: Text input with 'Salesforce Inc' entered.
- \* Business Type: Dropdown menu with 'Corporation' selected.
- \* Business Industry: Dropdown menu with 'Engineering' selected.
- \* Business Registration ID Type: Dropdown menu with 'USA: Employer Identification Number (EIN)' selected.

- If a number has been flagged by wireless providers, the fastest fix is to [release that number](#) and have your user request a new number.

## 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.

Released custom numbers can continue to be used if they're still available.

1. From Setup, enter *Number Management* in the **Quick Find** box, then select **Number Management**.
2. Click  next to a number.
3. Click **Release**.

## Remove Dialer Licenses from Users

Make Dialer licenses available for others by removing the permission sets and the permission set licenses from existing users.

When assigning licenses to users, you need to only assign permission sets. Permission set licenses are added automatically. However, to make the licenses available to reassign, you need to remove both the permission set and the permission set license.

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. Remove the Dialer permission sets.
5. Click **Save**.
6. In the Permission Set License Assignments related list, click **Edit Assignments**.
7. Deselect the Dialer permission set licenses.
8. Click **Save**.

### EDITIONS

Available in: Lightning Experience

Available with Sales Cloud and Service Cloud in:

**Essentials, Professional, Enterprise, Performance,** and **Unlimited** Editions

Sales 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 with Sales Cloud and Service Cloud in:

**Essentials, Professional, Enterprise, Performance,** and **Unlimited** Editions

Sales Dialer is available for an additional cost as an add-on license.

### USER PERMISSIONS

To remove permission sets:

- Assign Permission Sets

## 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.
3. 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.

## Sales 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.	<ul style="list-style-type: none"> <li>• Make sure you have a network connection.</li> <li>• Make sure you've granted your browser permission to access your microphone.</li> <li>• Check that Dialer is properly set up in your org.</li> </ul>
The audio is dropping in-and-out of my call.	Check the quality of your network connection. It's best to use a high speed or separate network for calling activity, or to prioritize Dialer traffic on your network.
I'm getting one-way audio (on either end).	<ul style="list-style-type: none"> <li>• Make sure your microphone and speaker are attached and enabled, and that your microphone isn't muted.</li> <li>• Check that you have opened the correct ports in your computer and network firewalls.</li> </ul>

### EDITIONS

Available in: Lightning Experience

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

Sales 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 Full sandbox:

- Manage Sandboxes

### EDITIONS

Available in: Lightning Experience

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

Sales Dialer is available for an additional cost as an add-on license.

**Problem****Potential Solutions**

The audio quality is poor on my call.

- Use a wired USB headset over wireless or mobile headphones.
- 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.

I'm having problems with ending or logging longer calls.

You may be exceeding your org's session timeout limit. If your org automatically logs out users after a short time, ongoing calls in inactive tabs aren't logged properly. Keep the tab active or contact your Salesforce admin about modifying your org's session security settings.

I'm seeing an Internal Consistency Evaluator (ICE) error: ICE negotiation with Twilio failed

Your network connectivity is poor, or your connection is being blocked by a firewall. Check your connection and try again. It may help to restart your browser or system. If the problem persists, contact your network administrator.

## 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. Articles come from reputable, English-language news sources.

News is scheduled for retirement as of the Winter '24 release. After that, News isn't available.

### [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 accounts, contacts, leads, opportunities, and the Home page. It's likely that News is already enabled for you, but you can turn it off.

#### EDITIONS

Available in: **Lightning Experience**

Available in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited** Editions

## Guidelines for Using News

Review guidelines for News, including which articles are shown, categories for news, and privacy and security information.

News is scheduled for retirement as of the Winter '24 release. After that, News isn't available.

#### EDITIONS

Available in: **Lightning Experience**

Available in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited** Editions

## News Based on Wherever You Access It

Where news is accessed	News categories that appear
Accounts, contacts, leads, and opportunities	Account News and Industry News
Home page or News app	Account News, Industry News, Trending at My Company, General Business News
The Salesforce mobile app	Account News, Industry News, Trending at My Company, General Business News

## Categories for News

Category	Includes news
Account News	Based on the record's account or recently viewed accounts.
Industry News	About the industry that's listed on either the account or the record's related account. When Industry News appears in places other than account, contacts, leads, and opportunities, we use recently reviewed accounts to determine the industry.
Trending at My Company	That your other users in Salesforce are reading.
General Business News (Home page only)	That's not directly related to the record's account or industry.

## How Articles Are Selected

We use natural-language processing (NLP) to determine which articles to show you. The process includes several steps.

Step	Details
Determine which articles are business-related	Assess how much, if any, of the article content is about businesses. Remove articles that are considered offensive or spam from further analysis.
Determine which companies are mentioned	See which accounts are mentioned in article.
Determine relevance of company that's mentioned	See if the company is mentioned as the main subject of the article, as opposed to a small mention.
Remove duplicates and give ranking	Make sure that the same article isn't coming from multiple news sources. Then rank the articles based on how recent and significant they are. An article becomes more significant when the same content appears in other articles. From the ranking, the best article for the company is selected.
Match article to Salesforce records	When matching articles to records, name variations are considered. For example, an article that mentions salesforce.com is matched to the Salesforce or SFDC account record.

## 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. Try to have the value in the Account Name field match the company name, so be aware of incorrect spellings, special characters, and other formatting.
- Salesforce processes all news to ensure it's relevant and free of 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.

## Salesforce Mobile App

- When accessing news from Salesforce on a mobile device, only one news item is displayed at a time.
- When accessing news from Salesforce on a tablet, you can't scroll through the available news items. Instead, the device's screen size determines the number of news items that are displayed.
- When navigating to other records, more news items can become available. It takes longer for those news items to appear in the News app.
- The News card is a separate component within the Related tab.

SEE ALSO:

[Enable News](#)

## Enable News

Give your sales reps instant access to relevant, timely news about customers, partners, and competitors. News appears on accounts, contacts, leads, opportunities, and the Home page. It's likely that News is already enabled for you, but you can turn it off.

News is scheduled for retirement as of the Winter '24 release. After that, News isn't available.

News articles come from reputable, English-language news sources.

1. Make sure you've allowed the network access needed for News to work.
2. From Setup, enter *Account Settings* in the **Quick Find** box, then select **Account Settings**.
3. Select **Enable News**.
4. Make sure that the News component is on your page layouts.

 **Important:** For default account, contact, and lead pages, the News component appears within a separate News Tab. 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.

If you disable News, the News tab isn't removed. Use the Lightning App Builder to remove it.

### SEE ALSO:

[Allow Network Access for News, Account Logos, and Automated Account Fields](#)  
[Guidelines for Using 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.

### 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.

### EDITIONS

Available in: Lightning Experience

Available in: **Essentials, Group, Professional, Enterprise, Performance, Unlimited** Editions

### USER PERMISSIONS

To enable News:

- [Customize Application](#)

### EDITIONS

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

Available in: **All** editions

### 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. The activity timeline is supported for accounts, cases, claims, contacts, contracts, insurance policies, leads, opportunities, and activity-enabled custom objects.

### Activity Reminders and Notifications

Salesforce displays event and task reminders differently in Classic and Lightning Experience. You can customize reminders in your personal settings in both places.

### Work with Archived Activities

Find, view, and edit 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. Archived activities aren't included in reports.

### Set Up Activities for Your Sales Reps

Optimize the way that your sales reps can manage events, calendars, and tasks.

### Work with the Dynamic Activity Composer

The dynamic activity composer gives reps activities at the click of a button and offers more choices than the tabbed activity composer.

#### 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.

### Start Using Tasks

Review some guidelines for using tasks, including helpful things to know, where to track tasks, and how task assignment works.

### Organizing and Completing Your Tasks with the To Do List

The To Do List is the place to see, sort, and organize your tasks across accounts, contacts, cadences, and other records. Use colors and labels, such as Urgent or New Business, to help identify what to tackle first. Flag and sort tasks that are most important, or see what's due today, or find tasks that were overlooked. Apply filters to further refine the view to see what needs your attention first.

### Considerations for Using Tasks

When you use tasks, keep in mind these considerations for creating, updating, delegating, and managing your task items.

### Considerations for Using the To Do List

Keep these considerations in mind when working with the To Do List.

### Create Tasks in Bulk for 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.

#### EDITIONS

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

Available in: **All** editions except **Personal**

### [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.

### [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.

### [Considerations for Closing and Reopening Tasks](#)

Salesforce Classic differs from Lightning Experience and the Salesforce mobile app in the way it handles validation rules on tasks.

### [Task Fields](#)

Task records have standard fields for tracking and recording task details.

### [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 mobile app.

#### SEE ALSO:

[Activities: Tasks, Events, and Calendars](#)

[Events and Calendars](#)

## Start Using Tasks

Review some guidelines for using tasks, including helpful things to know, where to track tasks, and how task assignment works.

### [Use Tasks in Lightning Experience to Boost Sales Productivity](#)

### General Guidelines

- 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.

#### EDITIONS

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

Available in: **All** editions except **Personal**

- 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.
- 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.
- If a user has read-only access for the Related To field and they create a task from a record's activity list, the task isn't related to the parent record. Users need edit access for the Related To field in order to relate tasks to record objects.
- Change the status of Task from either the task record or the activity timeline. To open a completed task from the activity timeline, select to change the status and choose an open status. To reopen a completed task from the task record, hover of the Completed button, select Reopen, and select an open status.
- Action overrides for viewing tasks aren't supported when using split view in Standard Lightning apps

## Where to Track Tasks

- Tasks tab—Shows task list views, including tasks due today, all your open tasks, overdue tasks, and tasks recently completed.
- Home page—A filterable compact view of up to five tasks.
- Records—To view and edit tasks, use the activity timeline in Lightning Experience or the activity related lists in Salesforce Classic.
- Kanban view for Opportunities—Cards show alerts when a task is overdue or when no open activities exist on an opportunity.
- 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.
- Emails, notifications, and reminders are sent about task assignments only after the task is reassigned from a tasks queue to a specific user.

- 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.

**SEE ALSO:**

[Set Up Tasks for Your Sales Reps](#)

[Enable Simpler Task Form in the Salesforce Mobile App](#)

[Activity Reminders and Notifications in Salesforce Classic](#)

*Trailhead: Create and Customize List Views*

## Organizing and Completing Your Tasks with the To Do List

The To Do List is the place to see, sort, and organize your tasks across accounts, contacts, cadences, and other records. Use colors and labels, such as Urgent or New Business, to help identify what to tackle first. Flag and sort tasks that are most important, or see what's due today, or find tasks that were overlooked. Apply filters to further refine the view to see what needs your attention first.

These types of tasks are included in the To Do List.

- Tasks
- Tasks from cadences and quick cadences
- Flow Orchestration work items

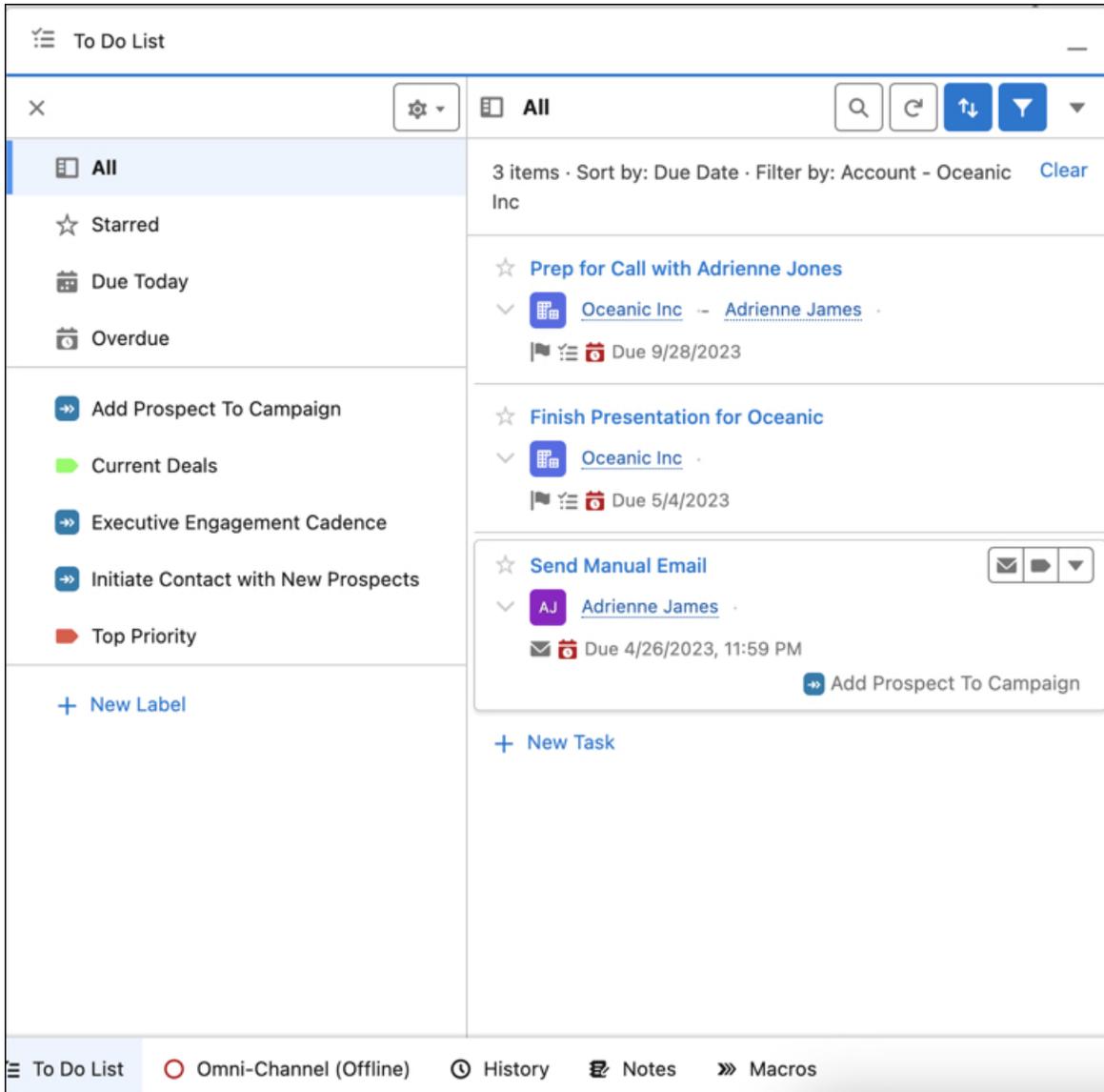
The To Do List lets you work with your tasks in several ways.

- Complete tasks directly from the To Do List.
- Add custom labels to tasks.
- Filter and group tasks by due date, label, cadence, and color.
- Reorder tasks by dragging.
- Search for specific items. Search doesn't include work items from flows.

### EDITIONS

Available in: Lightning Experience

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



Open the To Do List from the utility bar in the lower portion of the page.

If you don't see the To Do List in the utility bar, ask your Salesforce admin to add it.

## Considerations for Using Tasks

When you use tasks, keep in mind these considerations for creating, updating, delegating, and managing your task items.

### Task Reminders and Notifications in Lightning Experience

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 mobile app. The Lightning Experience notification bell shows up to three notifications simultaneously.

When members of a group are assigned, each group member gets a notification.

#### EDITIONS

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

Available in: **All** editions except **Personal**

 **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 mobile app, and review your reminders from the notification tray in the app.

## Task Creation for People and Groups in Lightning Experience

- You can assign a task to up to 200 people. When assigning a task to a group, the group can have up to 200 people in it. Each person gets their own task assignment.
- 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.
- Bulk creation of tasks for people and groups isn't supported in Lightning Experience quick actions or the `force:createRecord` event. Overriding this behavior, such as with a Visualforce page, isn't supported.
- Tasks are created only for the active members in public groups.
- Tasks created from quick actions can be assigned to users only.

## Task Assignment Notifications

Email notifications aren't sent for tasks created using code via an Apex batch. Because Apex batches are asynchronous, the batch process doesn't support the options required to set up notifications.

## Task Queues in Lightning Experience

- Only Salesforce admins can set up task queues.
- You can see task items in a queue's list view only if you're a member of the queue. However, partner community users aren't supported.
- Emails, notifications, and reminders are sent about task assignments only after the task is reassigned from a tasks queue to a specific user.
- To include task queues in packages, add the corresponding task list view and queue to your package.
- If the owner of a parent record is reassigned from a queue to a user, that record's open tasks remain in the task queue.
- If you add the `Assigned To` field to your custom activities report, you can't see tasks assigned to queues. To see tasks in queues, remove the `Assigned To` field.

## Task Reports

- Reporting dashboards that have components based on both the Tasks and Events report type and another report type can't be filtered by the Assigned field.
- You can't add the Assigned To related look-up fields to the Activities Custom Report types from the Report Types setup. The user fields don't display. To add User custom fields on the Assigned To field, add Assigned To as an object relationship on the Activities primary object in the custom report type. Standard and custom fields added to Assigned To are available to add to the report type, and are available on reports that use that report type.

## Tasks and List Views

- Filters on activity views can't be used on task views.

- Standard list view names, such as Today's Task, that are renamed then reverted to their original name aren't translated correctly.

## Follow-Up Tasks

- The **Create Follow-up Task** action is in the set of predefined Salesforce1 and Lightning Experience actions on Task page layouts. If you've overridden the Salesforce1 and Lightning Experience Actions section on any Task page layouts, manually add the **Create Follow-up Task** action from the Salesforce1 & Lightning Actions palette.
- The Name and Related To fields must be in the task compact layout so that their contents can be copied to the follow-up task.



**Note:** Subject, Name, and Related To are in the system default compact layout for a task.

## 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 `Recurrs`. 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.
- When you search tasks, only child tasks of a recurring series show up in the search results. Access the parent task from one of the series occurrences. This scenario is also true for searches within list views.
- When a child task's owner is changed to someone other than the parent task's owner, the child task is removed from the series. The `RecurrenceActivityId` is set to `null`.

## Recurring Task Limits

There's 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
Yearly	10	10 years

## Tasks in the Salesforce Mobile App

- You can set activity reminders from your tasks and events in the Salesforce mobile app, and review your reminders from the notification tray in the app.
- The Salesforce mobile app doesn't have an activity timeline, like records in Lightning Experience. Use the Activity History related list instead.
- The `Subject` field doesn't include a picklist of previously defined subjects when Show simpler New Task form on mobile is enabled in Activity Settings.
- Existing shared activities (created in Salesforce Classic and Lightning Experience) that use the Name field for contact associations can't be edited in the Salesforce mobile app.
- Task list views created in Lightning Experience aren't available on the Salesforce mobile app. Instead, manage tasks using these lists: **My Tasks**, **Completed Within Last 7 Days**, **Delegated**, and **Today**. Some task lists available in Salesforce Classic, such as **This Month** and **All Open**, aren't available in the Salesforce mobile app.
- In task lists, the order of the fields in the priority picklist determines the order in which tasks are sorted.
- The more tasks that you have, and the more relationships that your tasks have to other records, the longer it can take to view tasks.
- When more than 1,000 overdue tasks exist, task lists in the Salesforce mobile app don't display any overdue tasks at all. Use reports to view your overdue tasks and close them, postpone them, or delete their due dates.
- The `Create Recurring Series of Tasks` field isn't supported on quick action layouts. Because only a portion of the recurring task interface appears in new task quick actions, users can't save any new recurring tasks.
- The `Create Recurring Series of Tasks` field isn't supported on quick action layouts. Because only a portion of the recurring task interface appears in new task quick actions, users can't save any new recurring tasks.
- You can't create recurring tasks with a frequency of every weekday. We don't recommend editing tasks with this frequency because the edit page doesn't show the task's recurrence settings. To create or edit tasks that repeat every weekday, use Salesforce Classic.
- If a task doesn't include a subject, it appears in feeds as [No Subject].
- The All Activity History tab isn't available.
- Reps can't create a task with a reminder unless you turn off the **Show simpler New Task form on mobile** setting. From Setup, enter *Activity Settings* in the Quick Find box, then select **Activity Settings**. Deselect **Show simpler New Task form on mobile**.
- Task layouts contain a few unique elements that make tasks easier to work with. These elements don't appear in a compact layout because you can't change them, but users always see them:
  - The checkbox icon represents the status of the `ISCLOSED` field to users with the Edit Task permission.
  - The red flag icon represents a task marked high priority (including custom high priority).
  - If the due date exists and a user has permission to view it, all tasks show the due date.
  - Tasks include the primary contact and the related account or other record, when they exist.

The fields in each list can vary depending on the settings in your Salesforce org.

You control the layout of task records and tasks in the task list using compact layouts. You can control related lists, as always, using the page layout editor. Adding the due date field to either layout doesn't change the appearance of tasks and that field never appears twice.

Below the built-in task elements, the Salesforce mobile app displays up to three other fields.

- The default compact layout for tasks includes two fields: the name of a lead or contact, and an opportunity, account, or other record the task is related to.
- In an Activities related list, a task's fields depend on what record you're viewing and how you've defined the layout for that object.

For more information, see [Compact Layouts](#).

#### SEE ALSO:

- [Considerations for Closing and Reopening Tasks](#)
- [Considerations for Enabling User Control of Task Notifications](#)
- [Set Up Queues](#)
- [Create a Custom Report Type](#)

## Considerations for Using the To Do List

Keep these considerations in mind when working with the To Do List.

- Sorting by lead score is limited based on the last modified date.
- Sort by score looks at records that have been modified in the last 90 days.
- Selecting multiple filters works cumulatively; all of the filters must be true for a record to appear.
- When targets are added to cadences, a cadence list appears in the To Do List automatically.
- The Work Items section only appears if there are open work items to complete.
- You can have up to 10 custom labels.
- Filtering by related Account returns To Do items related to the Account and to the Account's Contacts.
- The search bar offers shortcuts to other labels and select filters. Task subject and description are the only searchable fields.
- To Do List items are specific to the user. Other users can't see your To Do List, and the To Do List isn't reportable.
- Items owned by a queue aren't supported in the To Do List

#### EDITIONS

Available in: Lightning Experience in Professional, Enterprise, Performance, and Unlimited editions.

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

## Create Tasks in Bulk for 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.

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.
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](#).

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.

#### EDITIONS

Available in Salesforce Classic

Available in: **All** Editions

#### USER PERMISSIONS

To create tasks:

- Edit Tasks

## 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 mobile app has separate settings for the task assignment notifications that you receive via your mobile device.
  -  **Note:** When you create a task in Lightning Experience, it doesn't display an option to send an email when you assign a task. However, there's a personal setting to receive an email when someone assigns you a task. Depending on how your admin has set up your Salesforce org, you can receive emails for tasks that you assign to yourself or create 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**.

## 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.

-  **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.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: **All Editions** except **Personal**

### USER PERMISSIONS

To create tasks

- Edit Tasks

### EDITIONS

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

Available in: **All editions** except **Personal**

### USER PERMISSIONS

To create repeating tasks:

- Edit Tasks

 **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](#)

[Enable Recurring Tasks in Lightning Experience and the Salesforce Mobile App](#)

## Considerations for Closing and Reopening Tasks

Salesforce Classic differs from Lightning Experience and the Salesforce mobile 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: Salesforce Classic ([not available in all orgs](#)), Lightning Experience, and all versions of the Salesforce mobile app

Available in: **All** editions

## Task Fields

Task records have standard fields for tracking and recording task details.

Field Label	Description
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. The limit is 255 characters.
Call Result	Represents the result of a given call; for example, "We'll call back" or "Call unsuccessful." The limit is 255 characters. A Salesforce admin can customize the selections in the picklist.

### EDITIONS

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

Available in: **All** editions except **Personal**

Field Label	Description
Call Type	Indicates the call type; for example, 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.
Completed Date/Time	Indicates the date and time when the task was completed.
Create Recurring Series of Tasks	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. This field is read only.
Due Date	Indicates the date when the task is due.
Email	Available only in Salesforce Classic. 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. In Lightning Experience, hover over the Related To record to access the email address.
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 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	Available only in Salesforce Classic. Contains the phone number of the contact or lead related to the task. In Lightning Experience, hover over the Related To record to access the phone number.
Priority	Indicates the urgency of the task; for example, Low, Normal, or High. A Salesforce admin can customize the selections in the picklist.
Recurrence Interval	Indicates the number of days after the task's due date or completed date when the next task is due.
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 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 Label	Description
	<ul style="list-style-type: none"> <li>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.</li> <li>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.</li> <li>If a user leaves the <code>Related To</code> field empty, Salesforce doesn't relate an account to the task.</li> </ul>
Reminder Set	Indicates whether a popup a reminder is set for the task.
Repeat This Task	Indicates a repeating 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 Subtype	Indicates the subtype of the task; for example, Call, List Email, or Task. This field can be used to refine task searches. This field is read only.
Type	Indicates the task type; for example, Email or Meeting. The limit for values in the picklist is 40 characters.

## 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 mobile app.

### [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 Task Notifications](#)

Let users receive notifications and reminders for tasks.

### [Enable Simpler Task Form in the Salesforce Mobile 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.

### [Enable Group Tasks in Salesforce Classic](#)

In Salesforce Classic, let users assign independent copies of a new task to multiple users.

### EDITIONS

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

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](#)

[Customize Buttons on the Tabbed Activity Composer](#)

[Tasks](#)

[Start Using Tasks](#)

## 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.

## Enable Recurring Tasks in Lightning Experience and the Salesforce Mobile App

Use recurring tasks to create tasks that repeat at a specified interval.

1. 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 mobile 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.

#### SEE ALSO:

[Enable Simpler Task Form in the Salesforce Mobile App](#)

#### EDITIONS

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

Available in: **All** editions except **Personal**

#### 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

## Enable Recurring Tasks in Salesforce Classic

Use recurring tasks to create tasks that repeat at a specified interval.

1. From Setup, enter *Activity Settings* in the Quick Find box, then select **Activity Settings**.
2. Select **Enable Creation of Recurring Tasks**.
3. Click **Submit**.

## Enable Task Notifications

Let users receive notifications and reminders for tasks.

### [Enable Task Notifications in Lightning Experience](#)

With task notifications, your reps remember the things on their to-do lists.

### [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.

### [Considerations for Enabling User Control of Task Notifications](#)

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.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: **All** editions except **Personal**

### USER PERMISSIONS

To enable recurring tasks:

- Customize Application and Modify All Data

### EDITIONS

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

Available in: **All** editions except **Personal**

## 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.

Push notifications and reminders in the notification tray aren't supported in the Salesforce mobile app. While reps can set and change notification settings in the Salesforce mobile app, they don't receive notifications in it.

SEE ALSO:

[Enable Simpler Task Form in the Salesforce Mobile 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.

This setting enables both email notifications and UNS notifications.

1. 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**.

Notification emails aren't sent for tasks that you assign to yourself; or for tasks that are assigned to another user with the status already set to **Completed**.

SEE ALSO:

[Considerations for Enabling User Control of Task Notifications](#)

## Considerations for Enabling User Control of Task Notifications

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.

This setting enables both email notifications and UNS notifications.

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: Lightning Experience

Available in: **All** editions except **Essentials**, **Personal**, and **Professional**

### USER PERMISSIONS

To edit a page layout:

- Customize Application

To customize the fields that display on tasks:

- Customize Application and Modify All Data

### 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

### EDITIONS

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

Available in: **All** editions except **Personal**

Table 14: 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 Experience Builder site users	In <b>My Settings &gt; Notifications</b> , the <b>Assigns you a task</b> checkbox is displayed.	In <b>My Settings &gt; Notifications</b> , the <b>Assigns you a task</b> checkbox isn't displayed.
Lightning Experience users	On the Activity Reminders page in the user's personal settings, the <b>Email me when someone assigns me a task</b> checkbox is displayed, and it's selected by default.	No user receives an email notification when another user assigns a task.
Salesforce Classic users, including Experience Builder site users	<ul style="list-style-type: none"> <li>On the Create Task page, the <b>Send email notification</b> and <b>Make this the default setting</b> checkboxes aren't displayed.</li> <li>On the Activity Reminders page in the user's personal settings, the <b>Email me when someone assigns me a task</b> checkbox is displayed, and it's selected by default.</li> <li>For tasks created by a flow or process, email notifications aren't sent when the task is assigned to a user.</li> </ul>	<ul style="list-style-type: none"> <li>On the Create Task page, the <b>Send email notification</b> and <b>Make this the default setting</b> checkboxes are displayed, and email notifications are sent according to whether the checkboxes are selected.</li> <li>The <b>Email me when someone assigns me a task</b> checkbox isn't displayed.</li> </ul>
Partner portal and partner community users	<ul style="list-style-type: none"> <li>On the Create Task page, the <b>Send email notification</b> and <b>Make this the default setting</b> checkboxes aren't displayed.</li> <li>Email notifications are sent whenever someone assigns a task to a user (partner portals have no settings page for admins or users).</li> </ul>	On the Create Task page, the <b>Send email notification</b> and <b>Make this the default setting</b> 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	<ul style="list-style-type: none"> <li>On the New Task page for workflow tasks, the <b>Notify Assignee</b> checkbox isn't displayed.</li> <li>If a Salesforce admin selected the <b>Notify Assignee</b> checkbox before Winter '15, task assignees who deselect the option don't receive notifications.</li> </ul>	Email notifications are sent to task assignees according to workflow task rules.
Users who are assigned tasks through an API	<p>Use an API to set the <code>triggerUserEmail</code> value. The default is false.</p> <ul style="list-style-type: none"> <li>If <code>triggerUserEmail = true</code>, notifications are sent according to individual users' settings. If a user</li> </ul>	<ul style="list-style-type: none"> <li>If <code>triggerUserEmail</code> is true, email notifications are sent to all users when tasks are assigned.</li> <li>If <code>triggerUserEmail</code> is false, email notifications aren't sent when a task is assigned.</li> </ul>

User Type	Effects of Enabling the Feature	Effects of Disabling the Feature
	<p>assigns a task to themselves, a notification isn't sent to that assigned user. You can also use Apex triggers to send push notifications, if needed.</p> <ul style="list-style-type: none"> <li>If <code>triggerUserEmail = false</code>, email notifications aren't sent when a task is assigned.</li> </ul> <p>If using REST API, create a custom REST endpoint and set the email trigger options to send notifications, as needed.</p>	
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:** When you create a task in Lightning Experience, it doesn't display an option to send an email when you assign a task. However, there's a personal setting to receive an email when someone assigns you a task. Depending on how your admin has set up your Salesforce org, you can receive emails for tasks that you assign to yourself or create with a status of Completed.

#### SEE ALSO:

[Enable User Control of Email Notifications for Tasks in Salesforce Classic](#)

*Implementation Guide: Salesforce Mobile Notifications Implementation Guide*

*Developer Guide: Exposing APEX Classes as REST Web Services*

*Developer Guide: Setting DML Options*

## Enable Simpler Task Form in the Salesforce Mobile App

Display a New Task page with key task fields shown first.

1. 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.

These hard-coded fields always appear in the Salesforce mobile app, no matter which fields are on the action page layout:

- Subject
- Comments
- Name
- Related To
- Due Date

If you use custom quick actions in publisher layouts used in the Salesforce mobile app, you must use the default Subject field, or the layout isn't shown to mobile users.

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.

### EDITIONS

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

Available in: **All** editions except **Personal**

### USER PERMISSIONS

To enable simpler tasks in the Salesforce mobile 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**

**11. Click Save.**

When you click **Expand All** on the activity timeline, you see the selected task fields.

SEE ALSO:

[Share Files Via Link](#)

## Enable Group Tasks in Salesforce Classic

In Salesforce Classic, let users assign independent copies of a new task to multiple users.

1. 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.

## 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 mobile 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.

### EDITIONS

Available in: Salesforce Classic (**not available in all orgs**)

Available in: **All** editions except **Personal**

### USER PERMISSIONS

To enable group tasks:

- Customize Application and Modify All Data

### EDITIONS

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

Available in: **All** editions except **Personal**

### USER PERMISSIONS

To customize task actions:

- Customize Application

### [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](#)

Reps can invite people to meetings and see meeting responses in Lightning Experience, Salesforce Classic, and the Salesforce mobile 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](#)

[Salesforce Meetings](#)

## 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 mobile 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 mobile app.

### [Set Up Users to Send Invitations to Attendees from Lightning Experience and the Salesforce Mobile App](#)

Setting up event invitations in Lightning Experience and the Salesforce mobile app requires one of our Microsoft® or Google integration products: Einstein Activity Capture or Lightning Sync.

### [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](#)

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 mobile app.

Setting or Feature	Description	Setup and Help	Lightning Experience	Salesforce Classic	The Salesforce Mobile App
Allow multiday events.	Let users create events that end more than one day (24 hours) after they start.	From Setup, enter <i>Activity Settings</i> in the <i>Quick Find</i> box, then select <b>Enable Multiday Events</b> .	✔	✔	✔
Allow recurring events or event series.	Let users create events that repeat at a specified interval. In Salesforce Classic, those events are called recurring events. In Lightning Experience and the Salesforce mobile app, they're called event series. See the Event Series section in <a href="#">Productivity Features: What's Different or Not Available in Lightning Experience</a>	In Salesforce Classic, from Setup, enter <i>Activity Settings</i> in the <i>Quick Find</i> box, then select <b>Enable Creation of Recurring Events</b> . If you disable this setting, users can still edit the interval of an existing event series, but they can't create a new series.  In Lightning Experience, from the Fields section in the page layout editor, drag <b>Repeat</b> into the	✔	✔	✔

### EDITIONS

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

Available in: **All** Editions

Setting or Feature	Description	Setup and Help	Lightning Experience	Salesforce Classic	The Salesforce Mobile App
		desired area of your event.			
Enable enhanced calendar features.	<ul style="list-style-type: none"> <li>• Display up to 500 events in calendar views.</li> <li>• Display events with overlapping event tiles.</li> <li>• Let users click an event to preview, and click again to open the event record page.</li> <li>• Let users drag to reschedule events in 15 minute increments.</li> <li>• Let users navigate to the day view by clicking a date in the month or week view.</li> <li>• Let users move within the calendar using the browser's Back and Forward buttons.</li> </ul>	From Setup, enter <i>Activity Settings</i> in the Quick Find box, then select <b>Use Lightning Web Components for Calendar Home</b> .	✓		
Allow hover links on Home tab calendar.	Display event details when a user hovers the mouse over an event.	From Setup, enter <i>User Interface</i> in the Quick Find box, then select <b>Enable Home Page Hover Links for Events</b> .		✓	
Allow drag-and-drop calendar editing.	Let users drag to reschedule events on the day or week view	From Setup, enter <i>User Interface</i> in the	✓	✓	

Setting or Feature	Description	Setup and Help	Lightning Experience	Salesforce Classic	The Salesforce Mobile App
	of their own calendars.	Quick Find box, then select <b>Enable Drag-and-Drop Editing on Calendar Views</b> .			
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 Salesforce Classic, from Setup, enter <i>User Interface</i> in the Quick Find box, then select <b>Enable Drag-and-Drop Scheduling on List Views</b> . See also Overview of Page Layouts and Field-Level Security.		✓	
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 <i>User Interface</i> in the Quick Find box, then select <b>Enable Click-and-Create Events on Calendar Views</b> .		✓	
Enable sidebar calendar shortcut.	Display a link (📅) to a user's last-used calendar view in the sidebar above Recent Items.	From Setup, enter <i>User Interface</i> in the Quick Find box, then select <b>Enable Sidebar Calendar Shortcut</b> .		✓	
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 <i>User Interface</i> in the Quick Find box, then select <b>Enable Hover Links for My Tasks list</b> .		✓	
Compare multiple user calendars.	Compare user calendars for one day using availability	From Setup, enter <i>Activity Settings</i> in the	✓	✓	

Setting or Feature	Description	Setup and Help	Lightning Experience	Salesforce Classic	The Salesforce Mobile App
	view in Lightning Experience. Add multiple calendars simultaneously with user lists. In Salesforce Classic, multi-user view organizes users by rows and can save multiple custom views.	<p>Quick Find box, then select:</p> <ul style="list-style-type: none"> <li>• <b>Show event details on multi-user calendar view</b> for Salesforce Classic. See <a href="#">Calendar Views in Salesforce Classic</a> on page 1000</li> <li>• <b>Add user lists to calendar views in Lightning Experience.</b></li> </ul>			
Customize user list calendars	Create, edit, and control who can see user list calendars. Before adding user lists to calendar views, review existing list views. Edit users' visibility and create filters to remove default users from user lists calendars.	See <a href="#">View and Manager Users</a>	✓		
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 <a href="#">Create and Manage a Public Calendar or a Resource Calendar</a> on page 979.	✓	✓	✓
Add or remove event attendees.	Let users add or remove attendees from events in Lightning Experience and the Salesforce	From the object management settings for event, go to Page Layout or	✓	✓	✓

Setting or Feature	Description	Setup and Help	Lightning Experience	Salesforce Classic	The Salesforce Mobile App
	mobile app. In Salesforce Classic, invitees are always available on the events layout. Users can invite contacts, leads, and other Salesforce users to events in all interfaces.	Compact Layout and add the Attendees field.			
Send invitations to event attendees.	Let event attendees receive invitations when users invite them to events from Lightning Experience and the Salesforce mobile app. In Salesforce Classic, invitations are sent to event invitees automatically.	To send invitations to attendees that users invite from Lightning Experience and the Salesforce mobile app, Einstein Activity Capture or Lightning Sync and a supported Microsoft Exchange or Google account are required. See <a href="#">Set Up Users to Send Invitations to Attendees from Lightning Experience and the Salesforce Mobile App</a> .			
Set event reminders.	Let users set event reminders in Lightning Experience or the Salesforce mobile app. Users see reminders in Lightning Experience only.	See <a href="#">Set Up Event Reminders in Lightning Experience</a> .	✔		

## SEE ALSO:

[Set Up Tasks for Your Sales Reps](#)

[Customize Buttons on the Tabbed Activity Composer](#)

## Set Up Users to Send Invitations to Attendees from Lightning Experience and the Salesforce Mobile App

Setting up event invitations in Lightning Experience and the Salesforce mobile app requires one of our Microsoft® or Google integration products: Einstein Activity Capture or Lightning Sync.

**Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.

First, make sure that you meet either the [Einstein Activity Capture system requirements](#) or [Lightning Sync system requirements](#).

Then, complete setup for your chosen product.

- If you choose Einstein Activity Capture, set up events to sync in one of these directions: [Salesforce to Exchange](#), [Salesforce to Google](#), or [Both Directions](#). Review [Set Up Einstein Activity Capture](#).
  - If you choose Lightning Sync, set up events to sync in one of these directions: [Salesforce to Exchange](#), [Salesforce to Google](#), or [Both Ways](#). Review [See the Big Picture for Setting Up Lightning Sync for Microsoft® Exchange](#) or [See the Big Picture for Setting Up Lightning Sync for Google](#).
- Note:** Event capture and the sync directions [Exchange to Salesforce](#) and [Google to Salesforce](#) don't generate event invitations for events created in Lightning Experience or the Salesforce app.

Now when syncing event organizers add attendees to events, an invitation is sent from organizers' Microsoft or Google accounts. Attendees with Microsoft or Google calendars can accept or decline invitations from those applications. Einstein Activity Capture or Lightning Sync then syncs attendee responses to Salesforce so that other reps with access to the event can see attendance statuses.

### SEE ALSO:

- [Considerations for Using Events and Calendars in Lightning Experience](#)
- [Einstein Activity Capture](#)
- [Lightning Sync \(Not Available for New Salesforce Customers as of Winter '21\)](#)
- [Event Attendee Sync](#)
- [Respond to Event Invitations from Your Microsoft or Google Calendar](#)

### EDITIONS

Events are available in Salesforce Classic ([not available in all orgs](#)), Lightning Experience, and all versions of the Salesforce mobile app in **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions.

Einstein Activity Capture is available in Lightning Experience and all versions of the Salesforce mobile app in **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions.

Lightning Sync is available in Salesforce Classic ([not available in all orgs](#)), Lightning Experience, and all versions of the Salesforce mobile app in **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

## 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 corners of their browsers.
2. 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.](#)

## Create and Manage a Public Calendar or a Resource Calendar

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 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

### EDITIONS

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

Available in: **All** editions except **Essentials**, **Group**, and **Personal** Editions

### 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.
  1. 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. When selected ( <code>true</code> ), the Start and End fields are shown as dates. When not selected ( <code>false</code> ), the Start and End fields are shown as dates and times. When users without access to this field create records, this field is set to false.
Assigned To	Indicates the assigned owner of the event. <p> <b>Important:</b> By default, the event is assigned to the user who created it. If the event is created by the Automated Process user, assign the event to a different user. The Automated Process user isn't a valid value for the Assigned To field.</p>

### EDITIONS

Available in Lightning Experience in: **All** Editions except **Personal** and **Contact Manager** Editions

Field	Description
	<p>If an event includes invitees, invitees get a copy of the original event in which the invitee is the event owner.</p> <p>This field isn't available in Personal Edition.</p>
Attendees	Lets you relate people and resources to an event. In Lightning Experience and the Salesforce mobile app, the people you invite to your events are called attendees. In Salesforce Classic, they're called invitees. In Lightning Experience and the Salesforce mobile app, users get the Attendees field when admins add it to Event page layouts or quick actions layouts.
autoRelateEventAttendees	<p>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.</p> <p>Admins control this field on the Activity Settings page.</p> <p>Available in API version 42.0 and later.</p>
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

Field	Description
Location	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 <code>Related To</code> field.
Phone	Indicates the location of the event.
Private	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.
Public	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.
Related To	This checkbox lets a user specify whether a past event is visible in the Self-Service portal. Starting with Spring ’12, the Self-Service portal isn’t available for new Salesforce orgs. Existing orgs continue to have access to the Self-Service portal.  If digital experiences is enabled in your org, the value in this field specifies whether the event is visible to external users in Experience Cloud sites. If an external user owns the event, that user sees the event in the site 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. <ul style="list-style-type: none"> <li>• 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.</li> <li>• 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.</li> <li>• If a user leaves the <code>Related To</code> field empty, then Salesforce doesn’t relate an account to the event.</li> </ul>

Field	Description
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.
Type	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. <p> <b>Important:</b> By default, the event is assigned to the user who created it. If the event is created by the Automated Process user, assign the event to a different user. The Automated Process user isn't a valid value for the Assigned To field.</p> <p>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 <code>Assigned To</code> as the person assigned to the original event, even though the invitee owns the copy.</p> <p>This field isn't available in Personal Edition.</p>
Create Recurring Series of Events	By selecting this checkbox, a user can set up a series of recurring events.

### EDITIONS

Available in Salesforce Classic in: **All Editions**

Events with invitees not available in: **Personal Edition**

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	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 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 <code>Related To</code> 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

Field	Description
	in another user's calendar can't be marked private. Private events can't be related to other records.
Public	<p> <b>Note:</b> Before Summer '13, this field was called <code>Visible in Self-Service</code>.</p> <p>This checkbox specifies whether a past event is visible in the Self-Service portal.</p> <p> <b>Note:</b> Starting with Spring '12, the Self-Service portal isn't available for new Salesforce orgs. Existing orgs continue to have access to the Self-Service portal.</p> <p>If digital experiences is enabled in your org, the value in this field specifies whether the event is visible to external users in Experience Cloud sites. If an external user owns the event, that user sees the event in the site regardless of whether the event is marked public.</p> <p>This field is not visible by default. A Salesforce admin can expose it.</p>
Related To	<p>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.</p> <p>If you relate the event to an object other than an account, Salesforce determines the account on the event as follows.</p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• 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.</li> <li>• If you leave the <code>Related To</code> field empty, then Salesforce doesn't relate an account to the event.</li> </ul>
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.

Field	Description
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.
Type	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.
  - 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.
  - To view more events simultaneously in list views, select **Table** view. Use the predefined lists or use your own filters, such as contacts or accounts, to focus on specific events.
- 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.

### EDITIONS

Available in Lightning Experience in: **All Editions** except **Personal** and **Contact Manager** Editions

### USER PERMISSIONS

To create events

- Edit Events

 **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](#)

## 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  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

### EDITIONS

Available in Salesforce Classic in: **All Editions**

Events with invitees not available in: **Personal Edition**

### USER PERMISSIONS

To create events

- Edit Events

- 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.

On an event detail page, to view the details of a single event in a recurring series () , 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 (🔄), 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.

### 1. [Create an Object 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.

### 5. [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.

#### EDITIONS

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

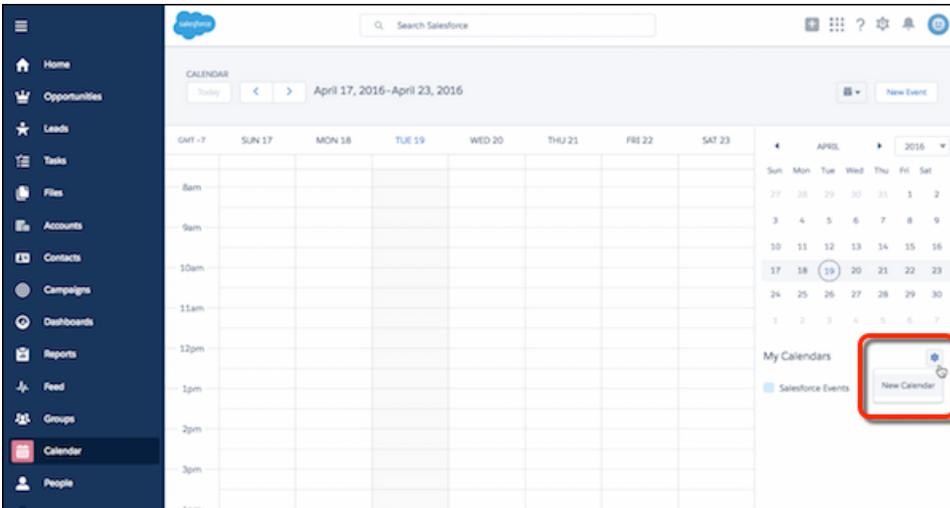
## Create an Object Calendar in Lightning Experience

Here's how to create a calendar based on a standard or custom object in Salesforce.

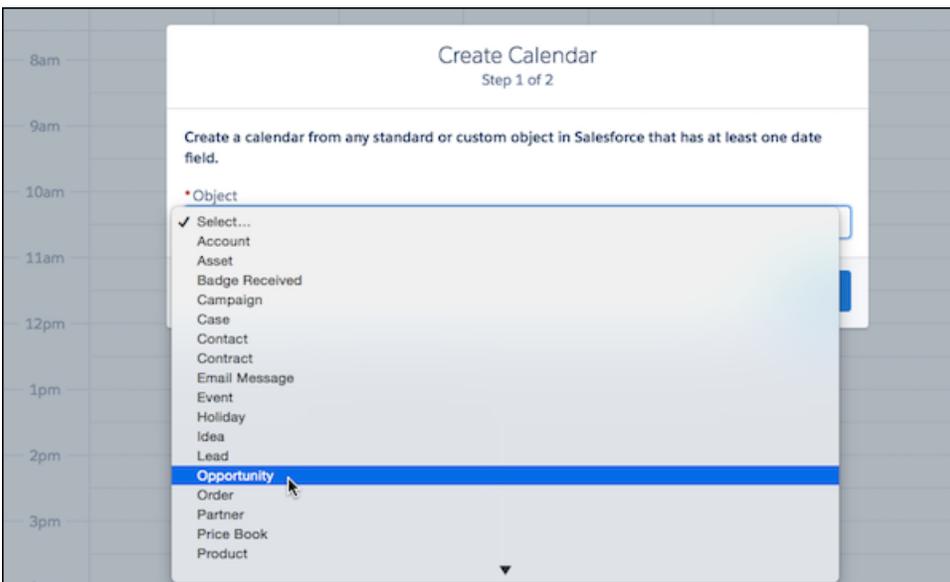
1. Start creating a calendar.

#### EDITIONS

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



2. Choose an object to base the calendar on.



3. Select fields (1, 2, 3) that determine what the calendar displays. Filter the calendar items by selecting a list view (4).

The screenshot shows the 'Create Calendar' dialog box in Salesforce, Step 2 of 2. The dialog is titled 'Create Calendar' and 'Step 2 of 2'. It shows a calendar grid in the background with a time slot from 8am to 2pm. The dialog has several fields: 'Calendar Name' (Opportunities Closing), 'Field for Start' (Close Date (Date)), 'Field for End' (None), 'Apply a Filter' (My Opportunities), and 'Field Name to Display' (Name). Red boxes highlight the 'Field for Start' (1), 'Field for End' (2), 'Apply a Filter' (4), and 'Field Name to Display' (3) fields.

4. The calendar shows items differently depending on the date fields you select.

#### Option

##### (Date) Fields

#### Description

The names of some date fields include (Date). If you select a (Date) field, the calendar shows items across the top as all-day items.

##### (Date/Time) Fields

The names of other date fields include (Date/Time). If you select a (Date/Time) field in Field for Start, the calendar shows 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 shows 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 shows 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.

The screenshot displays the Salesforce Lightning Experience calendar interface. At the top, it shows the current date as 'April 24, 2016-April 30, 2016'. The main calendar grid shows events for the week of April 24-30, 2016. Three events are visible: 'National Supply ...' on Monday (April 25), 'Acme Equipment' on Wednesday (April 27), and 'Star Restaurant ...' on Friday (April 29). The time slots range from 8am to 1pm. On the right side, there is a monthly view for April 2016, with the 19th highlighted. Below the calendar, the 'My Calendars' section is visible, showing 'Salesforce Events' and 'Opportunities Closing' (highlighted with a red circle).

## 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 an Object 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.

### EDITIONS

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

## 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.

### EDITIONS

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

SEE ALSO:

[Create an Object Calendar in Lightning Experience](#)

## 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 an Object Calendar in Lightning Experience](#)

[Build a Formula Field](#)

### EDITIONS

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

## 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

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

Depending on your customization options, you can view up to 150 or up to 500 calendar items total in the day, week, or month 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
Case	Idea	Report	Topic

### EDITIONS

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

Contact	Lead	Skill	User
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 an Object 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.
2. [View Coworkers' Calendars in Lightning Experience](#)  
When coworkers share their My Events calendar with you, then you can view it in Lightning Experience. Add several calendars to your calendar view at one time with user list calendars.

### EDITIONS

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

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

### 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 Coworkers' Calendars in Lightning Experience

When coworkers share their My Events calendar with you, then you can view it in Lightning Experience. Add several calendars to your calendar view at one time with user list calendars.

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. To enable user list calendars, your Salesforce admin selects the **Add user lists to calendar views in Lightning Experience** option from Activity Settings in Setup.

1. From the Calendar page, click calendar options next to Other Calendars.
2. Select **Add Calendars**.
3. Select **People** or **User Lists**.
4. Search for and select the name of the coworker or user list you want to add to your calendar view.
5. Click **Add**.  
After you add a shared calendar or user list, you see their events overlaid on your calendar view.

Use the availability view to compare different calendars side by side.

### EDITIONS

Available in: Lightning Experience

Available in: **Essentials**, **Professional**, **Enterprise**, and **Developer** Editions

### USER PERMISSIONS

To create events

- Edit Events

### EDITIONS

Available in: Lightning Experience

Available in: all editions except **Personal**, **Group**, and **Contact Manager**

### 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: Org-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 in Salesforce Classic](#)

## 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: Org-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.

1. 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:

Option	Description
<b>Hide Details</b>	Coworkers can see whether given times are available but can't see any other information about the nature of events in your calendar.
<b>Hide Details and Add Events</b>	Coworkers can see whether given times are available but can't see details of events. They can insert events in your calendar.
<b>Show Details</b>	Coworkers can see detailed information about events in your calendar.
<b>Show Details and Add Events</b>	Coworkers can see detailed information about events in your calendar, and they can insert events in your calendar.
<b>Full Access</b>	Coworkers can see detailed information about events in your calendar, and they can insert events in your calendar. In public calendars, you can edit 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.

To view a calendar, click **Change** next to the name at the top of the calendar in day, week, or month view, then select the calendar.

### 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! \(English Only\)](#)

## View Your Calendar

Access calendar views by:

- Choosing the Calendar page from the navigation menu.
- Opening a related event on a record's activity timeline. (If your record doesn't display the activity timeline, ask your Salesforce admin to customize your page layout.)

When you click an event that you have permission to access, an overlay displays a preview with event details. Your Salesforce admin configures the content of the overlays.

### EDITIONS

Available in Lightning Experience

Available in: **All Editions except Group or Contact Manager** Editions

## Grid Views

Calendar grid views display events in several ways.

- Current date or any date that you choose. You select how the calendar displays.
  - One column with events color-coded for selected calendars
  - One column for each selected calendar to compare available times

- One week at a time
- One month at a time

### Table View

To see specific events or more events simultaneously, open the table view. Customize an event list view to suit your needs or use the predefined lists views.

- My Recent Events
- My Team's Recent Events
- My Team's Upcoming Events
- My Upcoming Events
- New This Week
- Recently Viewed
- Today's Agenda

### My Calendars and Other Calendars

The calendar view displays up to 150 or 500 events in the following calendar types.

- Your own calendar
- An object calendar
- The calendar of another user (not available in Personal Edition)
- A list of user calendars
- A public calendar
- A resource calendar

Customize your view from the calendar side panel. You can show events from up to 50 calendars.

- To add calendars, click options .
- To display or hide a calendar, click the calendar name.
- To add an event, remove a calendar, or view only one calendar, click my event options .

### Printable View

After you customize your calendar view, click print to see a preview of your printed calendar. Print calendars using the browser print feature from Google Chrome™, Microsoft® Internet Explorer®, and Mozilla™ Firefox™.

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.

### EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: **All Editions** except **Group, Essentials,** or **Contact Manager** Editions

### Where to Select or Switch Views

You can access calendar views in the following locations.

- 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:  or **Today**
- A date that you choose using 
- A week at a time:  or **This Week**
- In a week view, with or without weekend days, which are always Saturday and Sunday regardless of your locale settings
- A month at a time:  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

To switch users or calendars, click **Change** 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**.

 **Note:** Users above the activity owner in the role hierarchy can view activities related to another record, regardless of whether your organization's sharing settings specify hierarchies.

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 dropdown 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** dropdown 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** dropdown 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 some considerations for creating, updating, owning, and inviting others to events in Salesforce Classic.
3. [Considerations for Using Events and Calendars in the Salesforce Mobile App](#)  
Not every Lightning Experience feature is in the Salesforce mobile app. Find out what's different.

## 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.

### Calendar

#### Calendar Views

You can't hide weekends in the Calendar view.

You can see events for up to 50 calendars. For public, resource, and other user's calendar events, you can see the subject, start time, and end time in the event preview detail. Other fields you added to the compact layout aren't visible.

When previewing an event, the date, type, time, duration, attendees, and email aren't visible.

The availability, day, week, and month calendar views show the view that you selected most recently when you return. When you use the table view, the calendar shows the default view when you return. To see your favorite list view as soon as the table view loads, click the pin icon.

When using Lightning Experience on iPad Safari, users can tap events to see the event preview card. To close, users can tap anywhere outside the preview card.

#### Calendar Item Limit

Depending on your customization options, you can view up to 150 or up to 500 calendar items total in the day, week, or month 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.

#### Public Calendars and Resource Calendars

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 Einstein Activity Capture or Lightning Sync, events you create and edit from Lightning Experience or any of the Salesforce mobile apps sync to Microsoft® calendars or Google Calendar™ automatically.

If an event is assigned to a user calendar, users can't reassign it to a public calendar.

#### User List Calendars

Only Salesforce admins and users with setup permissions can update user list views.

### Events

#### Activity Reminders

You can't set reminders from New Event global actions, even if your admin adds 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.

#### Attendees

In Lightning Experience and the Salesforce mobile app, the people you invite to your events are called attendees. In Salesforce Classic, they're called invitees. In Lightning Experience and the Salesforce mobile app, users get the Attendees field when admins add it to Event page layouts or quick actions layouts.

#### EDITIONS

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

Available in Lightning Experience in: **All Editions** except **Personal** and **Contact Manager Editions**

- 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.
- The Attendees field can't be renamed.
- The Attendees field isn't available on the activity timeline.
- Attendees see their name in the Assigned To field.
- An event attendee can't change the event type.

### Event Series

Events that repeat have different names and behavior depending on where you create them. In Lightning Experience and the Salesforce mobile app, they're called event series. In Salesforce Classic, they're called recurring events. It's best practice to edit repeating events in the user interface where they were created.

Here are some considerations for using event series in Lightning Experience.

- If you enabled platform encryption for Event Description, event series created during Winter '19 aren't automatically encrypted. To encrypt series created during Winter '19, edit the event series. Events that are updated to fall outside the series pattern aren't encrypted with the series. To encrypt these exceptions to the series, edit the individual occurrence.
- To load your calendar quickly, some series are initially projected in Salesforce and only visible on your calendar later. As a result, even after refreshing, sometimes you don't see all events from the series on your calendar immediately after saving. You can experience similar delays when deleting or editing your events. For example:
  - If you schedule a series that lasts longer than 365 days, you can see events that are scheduled within the next 365 days. To see subsequent events in the series, check your calendar when those events are within 365 days of occurring.
  - If you schedule a series that starts more than 365 days in the future, only the first occurrence shows on the calendar. The additional occurrences show on the calendar when they fall within the next 365 days.
  - If your admin has enabled shared activities, which let you associate multiple contacts or one lead to your events, then some events from the series can take a few moments to display on your calendar.
- You can add related files and notes to individual events in a series but not the series as a whole.
- Events in a series can't be made to overlap with other events in the series.
- If you create a series in Lightning Experience, you can't update or delete the series from Salesforce Classic.
- You can't edit the start date of a series. Instead, delete the series and recreate it with a new start date.
- When editing an event in a series, the Repeat checkbox is disabled.
- When you change a past event in a series, only that past event changes. When you change a future event, events in the entire series also change.
- You can't edit the series from events that fall outside of the series pattern.
- You can't delete a series from an event that is edited to occur before the original start date of the series.
- You can delete individual events that are a part of a series only from the event's detail page.
- Attendees can delete individual events only.
- If you edit the following fields for an event series, events that fall outside of the series pattern are updated along with the series. Previous changes to those events aren't kept and deleted events are recreated.
  - All-day event checkbox
  - Start or end time
  - Recurrence pattern
  - Recurrence start or end date
  - Location

- 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.
- A single series event can last up to 14 days unless your admin has enabled limits for event duration. In that case, you can't create an event that lasts more than 24 hours.
- Editing the Assigned To field for an event series doesn't update events that fall outside of the series pattern. Reassign these events to the new owner individually.
- If you schedule a series with events occurring more than 180 days in the past, all of the events in the series aren't displayed on your calendar. You can see the first event in the series and events that occur within 180 days of the current date.
- If you view deleted event series from the Recycle Bin, you see an item that represents the series pattern and isn't an event in the series. If you restore this item and don't see the series event on your calendar, try restoring another event in the Recycle Bin.
- If you have a custom field on an Event with a unique constraint, this constraint is enforced across all instances of a recurring series.
- Validation rules with errors can disrupt event series creation. To ensure your series show all events, test validation rules against single events and event series

### Dragging to Edit Events

In Lightning Experience, no admin setup is required to turn on calendar dragging. However, dragging events is different than in Salesforce Classic.

- Users can drag events and other records that they've added to calendars to reschedule them. However, users can't drag a contact or lead onto the calendar to create a meeting with that person.
- Users can't drag all-day events onto time slots to add start and end times. Likewise, users can't drag events to make them all-day events.
- Users can't drag event series or recurring events to new time slots on the Lightning Experience calendar.

### Invitations

To send event invitations to attendees for events created in Lightning Experience or the Salesforce mobile app, you're required to set up event sync using Einstein Activity Capture or Lightning Sync. See [Set Up Users to Send Invitations to Attendees from Lightning Experience and the Salesforce Mobile App](#).

-  **Important:** Starting in Winter '21, [Lightning Sync isn't available](#) to new Salesforce customers. If you're on Lightning Sync, use the [Lightning Sync migration assistant](#) for a seamless transition to [Einstein Activity Capture](#), our long-term solution for syncing contacts and events between Microsoft® or Google applications and Salesforce.
- Invitations initiated in Lightning Experience and the Salesforce mobile app are emailed to attendees from Microsoft® Exchange or Google Calendar™.
- Invitations initiated or updated from Lightning Experience and the Salesforce mobile app are always sent to attendees. Users can't save edits to events without sending updates to attendees.
- Users can't respond to event invitations from Lightning Experience or the Salesforce mobile app. While users can respond to invitations from Salesforce Classic, this action isn't recommended for Einstein Activity Capture or Lightning Sync users set to certain sync directions. See [Respond to Event Invitations from Your Microsoft or Google Calendar](#).

### 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 Einstein Activity Capture or Lightning Sync, events you create and edit from Lightning Experience or any of the Salesforce mobile apps sync to Microsoft® calendars or Google Calendar™ automatically.

## Considerations for Using Events and Calendars in Salesforce Classic

Be aware of some considerations for creating, updating, owning, and inviting others to events in Salesforce Classic.

### EDITIONS

Available in Salesforce Classic in: **All Editions**

Events with invitees not available in: **Personal Edition**

### 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.

#### 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 or 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 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 field in an event series override 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.

If you create a series in Lightning Experience and edit it in Salesforce Classic, you can edit only the entire series. We recommend editing event series in Lightning Experience only.

### 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

To enter the maximum end date allowed for the frequency that you selected, click **Calculate max end date**.

### 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.

### Custom Fields

If you have a custom field on the Event entity with a unique constraint, this constraint is enforced across all instances of a recurring series.

## 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.

### Invitees

In Salesforce Classic, the people you invite to your events are called invitees. In Lightning Experience and the Salesforce mobile app, they’re called attendees.

- The Invitees field can't be renamed.
- When viewing invitees’ events in Salesforce Classic, the Assigned To field contains the event owner's name. When viewing attendees’ events in Lightning Experience, the mobile app, and via the API, the Assigned To field contains the attendee’s name.
- In Salesforce Classic, when you search for an event and select an invitee’s event record link from the search results, you see the owner’s event record. In Lightning Experience, the mobile app, and via the API, when you search for an event and select an attendee’s event record link, you see the attendee’s event record.

## 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

 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 an event to a coworker, click  next to **Assigned To**. Select another user and save the event. 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 Event global actions, even if your admin adds the Reminder Set field to the global action layout.

SEE ALSO:

[Calendar Views in Salesforce Classic](#)

[Considerations for Syncing Events from Your Calendar Application to Salesforce Only](#)

## Considerations for Using Events and Calendars in the Salesforce Mobile App

Not every Lightning Experience feature is in the Salesforce mobile app. Find out what's different.

### Calendars and Events

- You can't see a full calendar like you can in the desktop site. Nor can you create a calendar from standard or custom objects.
- You can't create an event for another calendar application from a Salesforce event using the **Export Event** (formerly **Add to Outlook**) button. However, when Lightning Sync is set up to sync events, the events you create and edit from Lightning Experience or the Salesforce mobile app sync to Microsoft® or Google calendars automatically.
- When you create an event in the Salesforce mobile app, the start date defaults to today's date. Manually change the start date to your desired future date. Make this change even when you create an event by selecting a future date from the calendar.
- To give reps access to attendees, add the `Attendees` field to the Event page layout for events. Attendees can see other attendees' responses from the Details tab in the Attendees field, but can't see responses from the related tab.
- Meeting attendees can't respond to event invitations from the Salesforce mobile app. Users can accept or decline only from their Microsoft® calendar or Google Calendar™. To send invitations to event attendees in Lightning Experience, there are some requirements. See [Considerations for Using Events and Calendars in Lightning Experience](#).
- Reps can't share calendars with coworkers or view coworkers' calendars.
- Events reflect your Salesforce time zone and locale settings, not the time zone setting on your mobile device.
- If you view the event list while the time advances from 11:59 PM to midnight, the list isn't automatically updated to display the next day's date and time.
- Events that repeat have different names and behavior depending on where you create them. In Lightning Experience and the Salesforce mobile app, they're called event series. In Salesforce Classic, they're called recurring events. It's best practice to edit repeating events in the user interface where they were created.
- The Salesforce mobile app for Android doesn't have an activity timeline, like records in Lightning Experience. Use the Activity History related list instead.
- Emails and events captured through Einstein Activity Capture can't be accessed through the Salesforce mobile app.
- Existing shared activities (created in Salesforce Classic and Lightning Experience) that use the `Name` field for contact associations can't be edited in the Salesforce mobile app.
- If events are displayed on a Lightning app page that uses a standard list view component for the Event object, the Today action doesn't bring users to the full Events page. To see the Events page, tap **Menu > Events**.
- The `Duration` field is visible while editing events only. Event details show the event time and not the duration.

- Fields with HTML-formatting aren't supported. To show all fields from compact layouts in the mobile app, remove any HTML formatting.

## Activities and Events

- Existing shared activities (created in Salesforce Classic and Lightning Experience) that use the `Name` field for contact associations can't be edited in the Salesforce mobile app.

## Scheduling and Invitations

Reps can invite people to meetings and see meeting responses in Lightning Experience, Salesforce Classic, and the Salesforce mobile app. Reps can also accept meeting invites and create a Microsoft® Outlook® appointment for an event in Salesforce Classic.

1. [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® Outlook®, Google Calendar™, 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's 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 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.

### EDITIONS

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

Available 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.

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.

### EDITIONS

Available in Salesforce Classic in: **All** Editions Except **Personal** Edition

### USER PERMISSIONS

To invite people to an event:

- Edit Events

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  **Open 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.

## 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® Outlook®, Google Calendar™, 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.

### 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

### EDITIONS

Available in Salesforce Classic in: **All Editions**

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 Outlook and Gmail Integration](#)

## Create an Event in a Public Calendar in Salesforce Classic

A public calendar contains a schedule of events that's 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 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 Mobile App](#)

It isn't possible to respond to event invitations from Lightning Experience or the Salesforce mobile app. Instead, you can accept or decline event invitations from Microsoft® Exchange calendars or Google Calendar™, or the emails generated from those applications.

### [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](#)  
[Set Up Users to Send Invitations to Attendees from Lightning Experience and the Salesforce Mobile App](#)

### 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 Lightning Experience or the Salesforce Mobile App

It isn't possible to respond to event invitations from Lightning Experience or the Salesforce mobile app. Instead, you can accept or decline event invitations from Microsoft® Exchange calendars or Google Calendar™, or the emails generated from those applications.

Sending invitations to attendees added to events in Lightning Experience and the Salesforce app requires Einstein Activity Capture or Lightning Sync. When syncing coworkers invite you to events from Lightning Experience or the Salesforce app, you receive an email with a link to the event. Invitations are emailed from Microsoft Exchange or Google Calendar. If you respond from your Microsoft or Google calendar or the email generated from those applications, your responses then sync to Salesforce. That way, other attendees can see your attendance status.

### SEE ALSO:

- [Set Up Users to Send Invitations to Attendees from Lightning Experience and the Salesforce Mobile App](#)
- [Respond to Event Invitations from Your Microsoft or Google Calendar](#)

## 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**.

 **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.

### SEE ALSO:

- [Respond to Event Invitations from Your Microsoft or Google Calendar](#)

## Things to Know About Activities

Review additional considerations for activities.

### [Create Predefined Subjects for Tasks and Events](#)

Reps can create tasks and events faster with predefined subject values. A Salesforce admin defines subject values based on what's most useful to reps.

### [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.

### [Considerations for Disabling Roll Up of Activities to a Contact's Primary Account](#)

The account an activity rolls up to depends on the Related To field, the Name field, the Shared Activities setting, and if the setting for Roll up activities to a contact's primary account is enabled. Before deciding whether to change this default roll up behavior, review these considerations.

### EDITIONS

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

Available in: **All** editions except **Essentials**, **Personal**, and **Database.com**

### EDITIONS

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

Available in: **All** Editions except **Essentials**, **Personal Edition**, and **Database.com**

### EDITIONS

Available in: All Editions

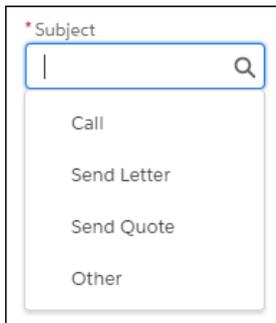
### Guidelines for Tracking Activities

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.

## Create Predefined Subjects for Tasks and Events

Reps can create tasks and events faster with predefined subject values. A Salesforce admin defines subject values based on what's most useful to reps.

When reps create tasks and events, they can choose a predefined subject, such as Call, Send Letter, or Send Quote.



The image shows a Salesforce picklist for the 'Subject' field. The picklist is open, displaying a search bar with a magnifying glass icon. Below the search bar, four options are listed: 'Call', 'Send Letter', 'Send Quote', and 'Other'.

These subjects let reps organize and sort their tasks based on what the tasks are. Without having to enter the type of task, reps can focus on adding details to describe the task.

**Example:** By customizing the predefined subject, a rep can choose “Call” and then add, say, “confirmed presentation this Friday”. Later, when a sales manager is searching for a task, they don’t have to wonder how the rep named the task, such as “Phone”, “Office call”, or “Follow-up call”. The common entry—Call—makes it much easier to do a search.

SEE ALSO:

[Add or Edit Picklist Values](#)

## 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.
- If a task or event is related to a lead, you can't relate the activity to additional contacts.
- When more than one contact is related to an event, activity reports don't show child events to that event if they're 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.

### EDITIONS

Available in: All Editions

### EDITIONS

Available in Lightning Experience and Salesforce Classic

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

- 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.
- Keep in mind that if you enable Shared Activities and you delete an activity such as a task or event, the WhatId and Whold fields on the activity record are empty. If you undelete the activity, the values in the WhatId and Whold fields are restored.
- If an invitee's event is deleted, the values in the WhatId and Whold fields on the invitee's event record persist. If an organizer's event is deleted, the corresponding events of the invitees are deleted and the values in the WhatId and Whold are also deleted.
- When you select Save & New from a task or event, only the primary contact is added automatically to the new record. Be sure to add any additional contacts, as needed.
- 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.
- If your activity sharing setting is set to Private, users with access to parent records have read-only access to your activities.

## Considerations for Disabling Roll Up of Activities to a Contact's Primary Account

The account an activity rolls up to depends on the Related To field, the Name field, the Shared Activities setting, and if the setting for Roll up activities to a contact's primary account is enabled. Before deciding whether to change this default roll up behavior, review these considerations.

 **Note:** To roll up activities, enable shared activities first.

- 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.
- If the relationship in the Related To field is to an account, opportunity, contract, or custom object that has an account parent to the entity, the activity rolls up to that entry. 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 ignored when determining an account's last activity date, if the activity is related to an account.
- If the Related To field is blank, the setting for Roll up activities to a contact's primary account determines whether this activity establishes the last activity date of the primary contact's primary account.
- The last activity date for contacts and leads is based on the activities where the contact or lead is the primary contact on the activity.
- 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.
- 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 appears on the person account record. That's because a person account is its own primary account.

### EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: **All Editions**

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.

**Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

### EDITIONS

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

Available in: **All** editions

## Record and Activity Relationships

An activity's `Related To` field helps determine an activity's relationship to an account.

Content of the <code>Related To</code> 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 what's listed in this table, including empty	The contact's primary account

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
  - 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—You have access to an activity based on your access to the Name (Who) record AND the Related To (What) record.

You can view an activity if:

- You're assigned to the activity, as Owner

OR

- You're above the user assigned to the activity in the role hierarchy

OR

- You have at least read access to the Name (Who) record and Related To (What) record to which the activity is related. If Shared Activities is enabled, you need at least read access to any one of the Name (Who) records.

OR

- You have the "View All" object-level permission for the Name (Who) record and the Related To (What) record.

OR

- You have the "View All Data" user permission

You can edit or delete an activity if:

- You have the "Edit Tasks" and "Edit Events" permissions:

AND

- You're assigned to the activity (your personal sharing setting doesn't apply)

OR

- You're above the user assigned to the activity in the role hierarchy (your personal sharing setting doesn't apply)

OR

- Activity Organization-Wide Default (OWD) is set to Controlled By Parent

AND

- You have edit or delete access to Name (Who) record (any 1 Contact if Shared Activities is enabled) AND the Related To (What) record.

OR

- The Name (Who) record is a private contact.

OR

- You have the "Modify All Data" user permission (your personal sharing setting doesn't apply)

Editing tasks in this case also includes changing the task assignment. See [Start Using Tasks for information](#) on page 953 about task assignment.

## 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. The activity timeline is supported for accounts, cases, claims, contacts, contracts, insurance policies, leads, opportunities, and activity-enabled custom objects.

### [Activity Timeline Customization Considerations](#)

Explore the changes you can make to the activity timeline.

### [Activity Timeline Settings 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

### [Sorting in the Activity Timeline](#)

Both upcoming and overdue activities and past activities can have different sort orders.

### [What Are the Differences Between Activity Timeline and Activity History?](#)

When you view the activities related to a contact, lead, or person account, keep in mind how the activity timeline and the activity history view differ.

## Activity Timeline Customization Considerations

Explore the changes you can make to the activity timeline.

 **Note:** If Enhanced Email isn't enabled, emails aren't saved as tasks and don't appear on the activity timeline.

The activity timeline shows activities associated via the name field (such as contact, lead, or person account) and the related to field (such as account and opportunity). Custom lookups appear in their own related list on the related entity record.

Tasks and all-day events have an implicit due date of midnight of the last day of the event. Multi-day events end on midnight of the last day of the event.

On the detail page for objects that support activities, Lightning Experience doesn't display the Open Activities or Activity History related lists 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.

You can customize the activity timeline using the Lightning App Builder.

 **Note:** Put the activity timeline component at the bottom of a layout, with no other components beneath it.

### 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.

### 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, logged calls, voice calls, and video 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 activity timeline.

The description field for events and the comments field for tasks also always appear in the activity timeline, although they aren't available in the compact layout. The remaining fields visible in the activity timeline reflect the fields you include in the compact layout.

### Custom Fields

Custom fields added to the compact layout don't appear in the activity timeline.

### 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.

### EDITIONS

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

## Icons

The icons for activity types (such as events, tasks, logged calls, voice and video calls, and email) in the activity timeline aren't customizable.

## Activity Timeline in the Salesforce Mobile App

The activity timeline is available in the Salesforce mobile app for iOS and Android. It's enabled by default on the supported record types: accounts, contacts, leads, and opportunities. Filter and search aren't supported on mobile.

You can choose to disable Activity Timeline on the app for all users by adding a connected app custom attribute. In Setup, enter *Connected Apps* in the Quick Find box, select **Manage Connected Apps**, then click the name of the connected app you want to modify. In the Custom Attributes section on the connected app page, click **New**. Enter `DISABLE_ACTIVITY_TIMELINE` for the attribute key and `"true"` for the attribute value.

### SEE ALSO:

[Sorting in the Activity Timeline](#)

[Use Enhanced Email for More Email Functionality](#)

[Lightning Experience Pro Tip: Tailor the Activity Timeline for Your Lightning Experience Users](#)

[Knowledge Article: Link custom Lookup fields from activities to other records](#)

## Activity Timeline Settings 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.

### Date Range

These options narrow down how far in the past and the future you want to see activities. The default selection is **All time**. When Einstein Activity Capture is turned on, the default selection becomes **Within 2 months**.

 **Note:** Overdue tasks are always shown in the activity timeline, regardless of which date range you select.

### Activities to Show

This option in the activity timeline settings narrows down which activities are shown.

- **My activities**  
Shows activities where you're involved, either as the owner or as a participant. For example, you're the owner of an email you sent or an event you organized. You're 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.

### Activity Types

Filter the types of activities you want to see. The list of activities reflects which activities you can access.

#### EDITIONS

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

## Sort Order

When you sort a list of upcoming and overdue activities, you can choose to list activities starting with the oldest or the newest. All the same activities are displayed.

SEE ALSO:

[Change Sorting for Upcoming and Overdue Activities](#)

## Sorting in the Activity Timeline

Both upcoming and overdue activities and past activities can have different sort orders.

[Sorting Options for Upcoming and Overdue Activities in the Activity Timeline](#)

You can sort upcoming and overdue activities in one of two ways: the sort order is up to your preference.

[Change Sorting for Upcoming and Overdue Activities](#)

When you sort a list of upcoming and overdue activities, the sort order is up to your preference.

[Sorting Options for Past Activities in the Activity Timeline](#)

Past activities can be sorted in one of two ways: the date the activity was due, or the date the activity was completed. If there's no due date, or the due date is in the future, the last modified date is used.

[Change Sorting for Past Activities](#)

Past activities can be sorted in one of two ways: the date the activity was due, or the date the activity was completed.

## Sorting Options for Upcoming and Overdue Activities in the Activity Timeline

You can sort upcoming and overdue activities in one of two ways: the sort order is up to your preference.

Tasks that aren't marked complete, with due dates in the past, are marked as overdue.

Items in the activity timeline and the activity history related list are sorted differently. Items in the activity history related list are sorted by due date.

### EDITIONS

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

### Oldest Dates First

Activities are sorted by their due date and time descending from oldest to newest. If several activities have the same due date, they're sorted by their last modified date.

Overdue activities are listed first, starting with the least recent due date. Then today's activities are listed, followed by upcoming activities with due dates closest to today. Activities with no due date are listed last, starting with the most recently modified.

Activity	Due Date	Description
Overdue (not marked complete)	Today minus 5 days	Overdue activity with the least recent due date
Overdue (not marked complete)	Today minus 3 days	Overdue activity due 3 days ago
Overdue (not marked complete)	Yesterday	Overdue activity with the most recent due date
Upcoming	Today	Upcoming activity due today

Activity	Due Date	Description
Upcoming	Tomorrow	Upcoming activity with the due date closest to today
Upcoming	Today plus 3 days	Upcoming activity due 3 days from today
Upcoming	Today plus 5 days	Upcoming activity with the due date furthest from today
Upcoming	No due date (modified today)	Upcoming activity without a due date, with the most recent modified date
Upcoming	No due date (modified 3 days ago)	Upcoming activity without a due date, with the least recent modified date

### Newest Dates First

Activities are sorted by their due date and time descending from newest to oldest. If several activities have the same due date, they're sorted by their last modified date.

Activities with no due date are listed first, starting with the least recently modified. Then upcoming activities with due dates furthest from today are listed, followed by today's activities. Overdue activities are listed last, starting with the most recent due date.

When you sort by newest dates first, you see overdue activities first. To see all upcoming and overdue activities descending from newest to oldest, click **View More**. Activities are added toward the top, starting with today's activities.

Activity	Due Date	Description
Upcoming	No due date (modified 3 days ago)	Upcoming activity without a due date, with the least recent modified date
Upcoming	No due date (modified today)	Upcoming activity without a due date, with the most recent modified date
Upcoming	Today plus 5 days	Upcoming activity with the due date furthest from today
Upcoming	Today plus 3 days	Upcoming activity due 3 days from today
Upcoming	Tomorrow	Upcoming activity with the due date closest to today
Upcoming	Today	Upcoming activity due today
Overdue (not marked complete)	Yesterday	Overdue activity with the most recent due date
Overdue (not marked complete)	Today minus 3 days	Overdue activity due 3 days ago
Overdue (not marked complete)	Today minus 5 days	Overdue activity with the least recent due date

SEE ALSO:

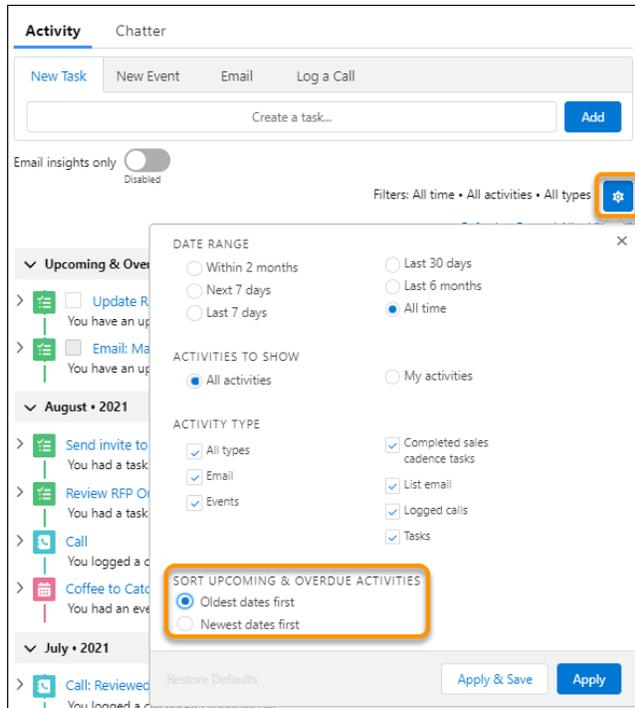
[Change Sorting for Upcoming and Overdue Activities](#)

## Change Sorting for Upcoming and Overdue Activities

When you sort a list of upcoming and overdue activities, the sort order is up to your preference.

To change your sort order in the activity timeline, click the gear icon, and then select your preferred sort order in the Sort Upcoming and Overdue Activities section. Then click **Apply**. Or, to change your default sort order, click **Apply & Save**.

Newest dates first is the default sort order.



SEE ALSO:

[Activity Timeline Settings Filters](#)

## Sorting Options for Past Activities in the Activity Timeline

Past activities can be sorted in one of two ways: the date the activity was due, or the date the activity was completed. If there's no due date, or the due date is in the future, the last modified date is used.

Sorting activities by their due date can give a misleading picture of when something actually happened. Often, an event is completed on a different day that when it was scheduled.

Items in the activity timeline and the activity history related list are sorted differently. Items in the activity history related list, including tasks, are sorted by the due date. Events with no due date are shown at the bottom of the list.

### Sort by Completed Date

In this case, past activities are sorted by completed date and data specific to the activity.

#### EDITIONS

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

#### EDITIONS

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

Activity	Sorting
Task	Completed Date Time
Logged Call	Completed Date Time
Event	Due Date Time, which is the same as Start Date Time
Email	Completed Date Time, which is the same as Email Sent Date Time
List Email	Schedule Date
Cadence Task	Completed Date Time

## Sort by Due Date

In this case, past activities are sorted by due date and data specific to the activity.

Activity	Sorting
Task	Due date descending. If no due date, or due date is in the future, last modified date.
Logged Call	Due date descending. If no due date, last modified date.
Event	Start DateTime, then secondary sorting by last modified date
Email	Message Date
List Email	Schedule Date
Cadence Task	Due date, then last modified date

SEE ALSO:

[Change Sorting for Past Activities](#)

## Change Sorting for Past Activities

Past activities can be sorted in one of two ways: the date the activity was due, or the date the activity was completed.

1. From Setup, in the Quick Find box, enter *Activity*, and then select **Activity Settings**.
2. To sort past activities by the completed date, select **Sort past activities by the completed date**. To sort past activities by the due date, deselect **Sort past activities by the completed date**.

### EDITIONS

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

### USER PERMISSIONS

- Customize Application
-

## What Are the Differences Between Activity Timeline and Activity History?

When you view the activities related to a contact, lead, or person account, keep in mind how the activity timeline and the activity history view differ.

The activity timeline and the activity history view are two different views, and behave differently.

One difference appears when you send a list email to multiple contacts, leads, or campaign members. On each recipient's activity timeline, the list email appears as one entry. When you click **View All** to view the recipient's activity history, however, every email sent by the list email is shown.

For example, send a list mail to two contacts in an account. On the account's activity timeline, the list email shows as one item. Then click **View All** on the Activity Timeline to open the activity history view. Two emails appear: one for each of the contacts in the list mail.

### EDITIONS

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

## Activity Reminders and Notifications

Salesforce displays event and task reminders differently in Classic and Lightning Experience. You can customize reminders in your personal settings in both places.

### [Activity Reminders and Notifications in Salesforce Classic](#)

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.

### [Activity Reminders and Notifications in Salesforce Lightning Experience](#)

Event and task reminders display as notification cards in Lightning Experience. You can customize reminders in your personal settings.

### EDITIONS

Available in Lightning Experience, the mobile app, and Salesforce Classic in: **All Editions Except Database.com**

## Activity Reminders and Notifications in Salesforce Classic

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.

### EDITIONS

Available in Salesforce Classic in: **All Editions Except Database.com**

### 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

### 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` isn't set, the window displays reminders in the following order:

- The task and event reminder date and time.
- The task due date *or* the event start date and time.

- Ascending alphabetical order by subject.

If `Sort reminder window by due date` is set, the reminders are displayed in the following order:

- 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
- The task and event reminder date and time
- 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 <code>Start of day</code> 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 <code>None</code>

## Customizable Reminder Settings

Customize your reminder settings in your personal settings. From your personal settings, search for *Reminders* and select **Activity Reminders**

**Table 15: Reminder Settings**

Setting	Result When Setting Is Enabled
<code>Show reminders</code>	The reminder window opens when a reminder is due.
<code>Play reminder sounds</code>	Salesforce plays a reminder sound when a reminder is due.
<code>Set default event reminders to:</code>	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.
<code>Set default task and all-day event reminders to:</code>	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.
<code>Sort reminder window by due date</code>	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` isn't 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.

## Activity Reminders and Notifications in Salesforce Lightning Experience

Event and task reminders display as notification cards in Lightning Experience. You can customize reminders in your personal settings.

### EDITIONS

Available in Lightning Experience, the mobile app in: **All Editions Except Database.com**

## Customizable Reminder Settings

You can customize your **Activity Reminders** settings in your personal settings.

**Table 16: Reminder Settings**

Setting	Result When Setting Is Enabled
Show task reminders in Lightning Experience	The task reminder opens as a notification card. This setting doesn't affect the setting in Salesforce Classic.
Set default task and all-day event reminders to:	Choose the date and time when you want reminders for tasks and all-day events; 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.
Show event reminders in Lightning Experience	The event reminder opens as a notification card. This setting doesn't affect the setting in Salesforce Classic.
Set default event reminders to:	Choose how long before an event you want a reminder to appear; the default is 15 minutes before the event. You can disable the reminder or change the reminder time when you edit an event.
Email me when someone assigns me a task	When another person assigns you a task, you get an email.

## Considerations for Activity Reminders

Activity Reminder Refresh Interval	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.
Delayed Activity Reminder Notifications	Real-time notifications can be delayed when more than 1,000 users in a Salesforce org are logged in and receive notifications. Refresh your Salesforce page to get new notifications.

## Work with Archived Activities

Find, view, and edit 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 archive recurring tasks or events in a series.

Salesforce doesn't delete archived activities, but you can manually delete them.

When you create or refresh a sandbox, archived activities aren't copied.

You can view and interact with archived activities in exported data and in certain locations in Salesforce.

 **Note:** Archived activities aren't included in reports.

If you modify an archived activity such that it no longer meets the archival criteria, it's no longer considered archived. Salesforce archives the activity again when it meets the criteria in the future.

For example, imagine that a task was created 365 days ago with no due date. It was closed some time earlier and is archived today, 365 days after its creation. Tomorrow, a user edits the task by adding a due date of Jan 1, 2020. Now the task doesn't meet the archive criteria, and is unarchived. The task is rearchived 365 days after Jan 1, 2020, not 365 days after tomorrow, which is the last modified date.

## Lightning Experience

You can view the history of your work with customers, including archived activities, from several places.

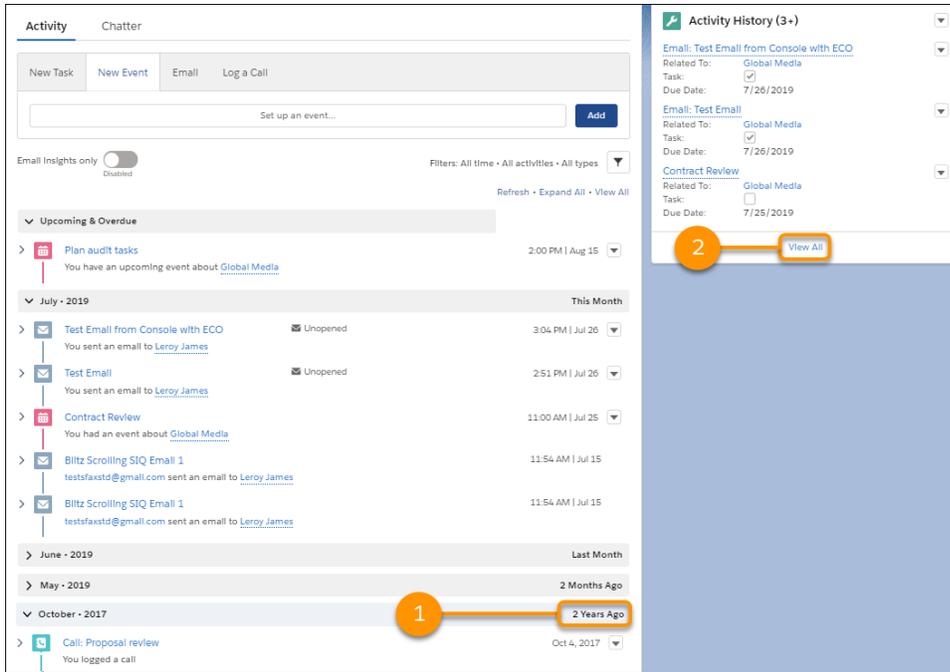
Archived activities are in the activity timeline (1), where they can be viewed and edited.

Clicking **View All** (2) in the Activity History related list opens the Activity History tab.

### EDITIONS

Available in Lightning Experience and Salesforce Classic

Available in: **All Editions**



In the Activity History tab, you can sort entries. Click the subject (1) to open and edit activities, including archived activities, or use the row-level dropdown (2) to edit or delete activities.

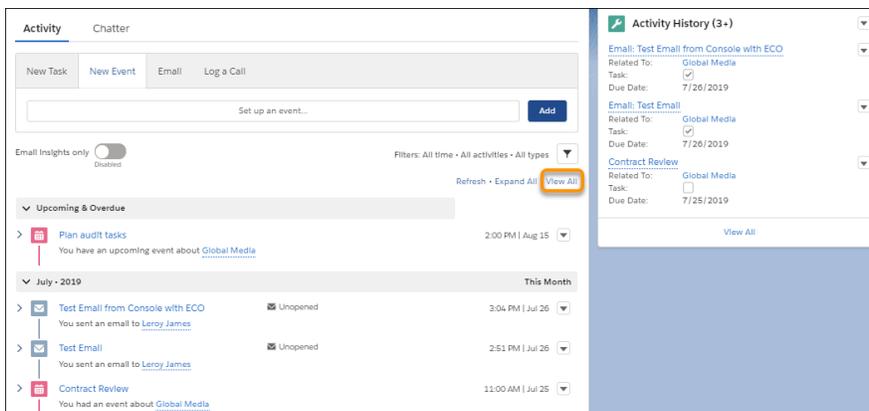
Contacts > Leroy James  
Activity History

16 Items • Sorted by Due Date, Last Modified Date/Time • Updated 2 minutes ago

	SUBJECT	RELATED TO	TASK	DUE DATE	ASSIGN...	LAST MODIFIED DAT...	
1	Email: Test Email from Console with ECO	Global Media	<input checked="" type="checkbox"/>	7/26/2019	Ad1 User	7/26/2019, 2:5	<input type="checkbox"/>
2	Email: Test Email	Global Media	<input checked="" type="checkbox"/>	7/26/2019	Ad1 User	7/26/2019, 9:3	<input type="checkbox"/>
3	Contract Review	Global Media	<input type="checkbox"/>	7/25/2019	Ad1 User	7/25/2019, 9:3	<input type="checkbox"/>
4	Email: SIQ Email 2019-06-21	NBA	<input checked="" type="checkbox"/>	6/21/2019	Ad1 User	6/21/2019, 10:	<input type="checkbox"/>
5	Email: Core Email 1	NBA	<input checked="" type="checkbox"/>	5/24/2019	Ad1 User	5/24/2019, 10:36 PM	<input type="checkbox"/>

Clicking **View All** in the activity timeline opens the All Activity History list.

 **Note:** You can't access attached files for archived activities in Lightning Experience. To access the attached files, you can change the activity so that it no longer meets the archival criteria, or open the activity in Salesforce Classic.



The All Activity History list is ideal for printing.

CONTACT  
**Leroy James**

Activities logged by Einstein Activity Capture aren't shown.

Subject Email: Test Email from Console with ECO	Related To Global Media	Task <input checked="" type="checkbox"/>
Due Date 7/26/2019	Assigned To Ad1 User	Last Modified Date 7/26/2019, 3:04 PM

Comments  
To: rcsftesting4@yahoo.com  
CC: ejiang@salesforce.com  
BCC: ejiang@salesforce.com  
Attachment: --none--

Subject: Test Email from Console with ECO  
Body:  
Test Email from Console with ECO

---

Subject Email: Test Email	Related To Global Media	Task <input checked="" type="checkbox"/>
Due Date 7/26/2019	Assigned To Ad1 User	Last Modified Date 7/26/2019, 2:51 PM

Comments  
To: rcsftesting4@yahoo.com  
CC: ejiang@salesforce.com  
BCC: ejiang@salesforce.com  
Attachment: --none--

Subject: Test Email  
Body:  
Test Email with Core

Up to 2,000 records appear, including archived records.

-  **Note:** This view doesn't include activities from Einstein Activity Capture. This view shows standard fields. Custom fields aren't shown. Formula fields, except for HTML formula fields, aren't shown.
-  **Note:** This view always shows the default background, even when a theme is in effect.

## Salesforce Classic

View archived activities in these locations in Salesforce Classic:

- In the Activity History related list or by clicking **View All**

Activity History											
		Log a Call		Mail Merge		Send an Email		View All		Activity History Help ?	
Action	Subject	Name	Related To	Task	Due Date	Assigned To	Last Modified Date/Time				
<a href="#">Edit</a>   <a href="#">Del</a>	Email: asd		Global Media	<input checked="" type="checkbox"/>	9/13/2017	Test User	9/13/2017 3:20 PM				

- 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. Archived activities aren't included in reports.

### [Report on the Primary Contacts for Activities](#)

Create a custom report that shows the primary contact for each of your activities.

### [Report on Activities Related to Other Records](#)

Create a report that shows which customers sales reps are spending their time with.

### [Report on Contacts Related to Activities](#)

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. In the Activities section, select **Tasks and Events**.
4. Click **Continue** (Lightning Experience) or **Create** (Salesforce Classic).
5. From the Fields list, drag and drop the Contact field onto the report.
6. Drag and drop other fields that you want to include in the report.
7. Save and run the report.

## Report on Activities Related to Other Records

Create a report that shows which customers sales reps are spending their time with.

1. Click the **Reports** tab.
2. Click **New Report**.
3. In the Activities section, select a report type such as **Activities with Accounts**.
4. Click **Continue** (Lightning Experience) or **Create** (Salesforce Classic).
5. From the Fields list, drag and drop at least 1 Contact field onto the report.
6. Drag and drop other fields that you want to include in the report.
7. Save and run 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 run reports:

- Create and Customize Reports and Report Builder

## Report on Contacts Related to Activities

Create a report that shows all contacts related to each of your activities.

1. Click the **Reports** tab.
2. Click **New Report**.
3. In the Activities section, select **Activities with Contacts**.
4. Click **Continue** (Lightning Experience) or **Create** (Salesforce Classic).
5. From the Fields list, drag and drop at least 1 Contact field onto the report.
6. Drag and drop other fields that you want to include in the report.
7. Save and run 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 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. For *Primary Object*, select **Users**. Fill in the other required fields.
4. Click **Next**.
5. Click the box under the primary object.
6. Select **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 if they aren't already added: *Date*, *Subject*, *Name*, *Related To*. For each field, select the **Checked by Default** option.
10. Double-click the label for the *Name* field and change the label to *Contact*. Change the *Related To* field to *Opportunity*.
11. Click **Save**.
12. Create a report based on the report type that you created.
13. Group the rows by *Full Name* using **Group Rows** in Lightning Experience or by selecting **Summary Format** in Salesforce Classic.
14. Save and run the report.

### 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

Shared activities must be enabled for custom reports based on activity relationships to include event organizers along with invitees and to include 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](#)

[Build 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.

### [Enable Shared Activities](#)

With shared activities, users can relate up to 50 contacts (but only 1 lead) to an event or a task.

### [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.

### [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.

### [Considerations for Disabling Roll Up of Activities to a Contact's Primary Account](#)

The account an activity rolls up to depends on the Related To field, the Name field, the Shared Activities setting, and if the setting for Roll up activities to a contact's primary account is enabled. Before deciding whether to change this default roll up behavior, review these considerations.

### [Enable Activity Reminders](#)

Let users set individual preferences for displaying event and task reminders.

### [Customize Buttons on the Tabbed 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 tabbed activity composer, you can add them. Just add the appropriate buttons to the Salesforce Mobile and Lightning Experience Actions section of page layouts.

### [Control Access to Activities](#)

Disable the Access Activities permission so users, such as guest users in Experience Builder sites, don't have access to any tasks, events, and emails. That way, your reps and agents can be sure that their work remains private.

### EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: **All** Editions

## Enable Shared Activities

With shared activities, users can relate up to 50 contacts (but only 1 lead) to an event or a task.

1. 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.

SEE ALSO:

[Knowledge Article: Orgs Can't Have a Lead and a What on the Same Record](#)

## 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.
- If a task or event is related to a lead, you can't relate the activity to additional contacts.
- When more than one contact is related to an event, activity reports don't show child events to that event if they're 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.
- Keep in mind that if you enable Shared Activities and you delete an activity such as a task or event, the **WhatId** and **Whold** fields on the activity record are empty. If you undelete the activity, the values in the **WhatId** and **Whold** fields are restored.
- If an invitee's event is deleted, the values in the **WhatId** and **Whold** fields on the invitee's event record persist. If an organizer's event is deleted, the corresponding events of the invitees are deleted and the values in the **WhatId** and **Whold** are also deleted.
- When you select **Save & New** from a task or event, only the primary contact is added automatically to the new record. Be sure to add any additional contacts, as needed.
- 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.

### 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](#)

### EDITIONS

Available in Lightning Experience and Salesforce Classic

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

- 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.
- If your activity sharing setting is set to Private, users with access to parent records have read-only access to your activities.

## 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.

Rolling up activities can skew reporting. For example, if a user logs an activity against a contact referencing a related account, the activity shows up and counts against the contact's primary account. The report shows the activity for the primary account even though that specific account had nothing to do with the interaction. Therefore, we recommend deselecting this option.

 **Note:** To roll up activities, enable shared activities first.

1. 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 activities 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:

[Enable Shared Activities](#)

[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

The account an activity rolls up to depends on the Related To field, the Name field, the Shared Activities setting, and if the setting for Roll up activities to a contact's primary account is enabled. Before deciding whether to change this default roll up behavior, review these considerations.

 **Note:** To roll up activities, enable shared activities first.

- 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.
- If the relationship in the Related To field is to an account, opportunity, contract, or custom object that has an account parent to the entity, the activity rolls up to that entry. 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 ignored when determining an account's last activity date, if the activity is related to an account.
- If the Related To field is blank, the setting for Roll up activities to a contact's primary account determines whether this activity establishes the last activity date of the primary contact's primary account.
- The last activity date for contacts and leads is based on the activities where the contact or lead is the primary contact on the activity.

### EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: **All** Editions

- 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.
- 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 appears on the person account record. That's because a person account is its own primary account.

## SEE ALSO:

[Contacts to Multiple Accounts](#)

## Enable Activity Reminders

Let users set individual preferences for displaying event and task reminders.

1. 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**

## Customize Buttons on the Tabbed 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 tabbed 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.

### 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

 **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 Layout](#)
- [Permission Sets](#)

## Control Access to Activities

Disable the Access Activities permission so users, such as guest users in Experience Builder sites, don't have access to any tasks, events, and emails. That way, your reps and agents can be sure that their work remains private.

This change also applies to Experience Builder sites and Salesforce Tabs + Visualforce sites, accessed through Lightning Experience, all versions of the Salesforce mobile app, and Salesforce Classic. Digital Experiences are available in Enterprise, Performance, Unlimited, and Developer editions.

1. From Setup, enter *Permission Sets* in the Quick Find box, then select **Permission Sets**.
2. Select or create a permission set, and then open **System Permissions**.
3. Based on your user license, update the permission set.

 **Note:** Some licenses don't allow permission set changes for this permission.

4. Verify that all the users you'd like to have access to activities have the Access Activities permission enabled on their profile.

When you disable the Access Activities permission, users also can't see or create events on calendars.

Guest users have access to emails in these circumstances:

- Enhanced Email is enabled and the Access Activities permission is enabled on their profile
- Email-to-Case is enabled and the user has read access to cases

The Access Activities permission doesn't change user access to Email-to-Case emails. Emails associated with cases that a user has access to appear in the case feed and the case's email related list.

## Work with the Dynamic Activity Composer

The dynamic activity composer gives reps activities at the click of a button and offers more choices than the tabbed activity composer.

### [Considerations for Using the Dynamic Activity Composer](#)

Review considerations for using the dynamic activity composer instead of the tabbed activity composer.

### [Switch Between the Tabbed and Dynamic Activity Composer](#)

An admin determines whether users see the tabbed activity composer or the dynamic activity composer on a page.

### EDITIONS

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

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions and in all editions that allow profile changes.

### USER PERMISSIONS

To disable activity access:

- Customize Application and Modify All Data

To access tasks, events, calendar, and email:

- Access Activities

### EDITIONS

Available in Lightning Experience in all editions except **Starter**

### [Customize the Dynamic Activity Composer](#)

Add actions to the dynamic activity composer through the page layout in the Salesforce Mobile and Lightning Experience Actions.

## Considerations for Using the Dynamic Activity Composer

Review considerations for using the dynamic activity composer instead of the tabbed activity composer.

The dynamic activity composer is different from the tabbed activity composer.

- Macros don't work with the dynamic activity composer. To use macros, revert to the tabbed activity composer.
- If feed tracking is enabled, the dynamic activity composer doesn't work in the Case object.
- The Add Call to To Do List and Add Email to To Do List options appear only if the To Do List is in the utility bar and at least one task action is in the dynamic activity composer.
- To launch a quick action from your custom component using the dynamic activity composer, use the `lightning-navigation` and `lightning-page-reference-utils` components.

SEE ALSO:

[Switch Between the Tabbed and Dynamic Activity Composer](#)

[Lightning Aura Components Developer Guide: Create an Email as a Quick Action with Aura Components](#)

[Lightning Web Components Developer Guide: Create an Email as a Quick Action with Lightning Components](#)

### EDITIONS

Available in Lightning Experience in all editions except **Starter**

## Switch Between the Tabbed and Dynamic Activity Composer

An admin determines whether users see the tabbed activity composer or the dynamic activity composer on a page.

Lead, contact, account, and opportunity record home pages typically show the activity composer.

1. On any page with an activity composer, click **Setup** and then **Edit Page**.
2. Select the activities component.
3. In the properties panel, select **Use tabbed activity view**.
4. Save the change.  
All users see the tabbed activity composer on that page.

SEE ALSO:

[Considerations for Using the Dynamic Activity Composer](#)

### EDITIONS

Available in Lightning Experience in all editions except **Starter**

### USER PERMISSIONS

To change page layouts:

- Customize Application

To view page layouts:

- View Setup and Configuration

## Customize the Dynamic Activity Composer

Add actions to the dynamic activity composer through the page layout in the Salesforce Mobile and Lightning Experience Actions.

The primary action is available when the button is clicked. For email, custom actions, such as Email 1 and Email 2, are of type Email.

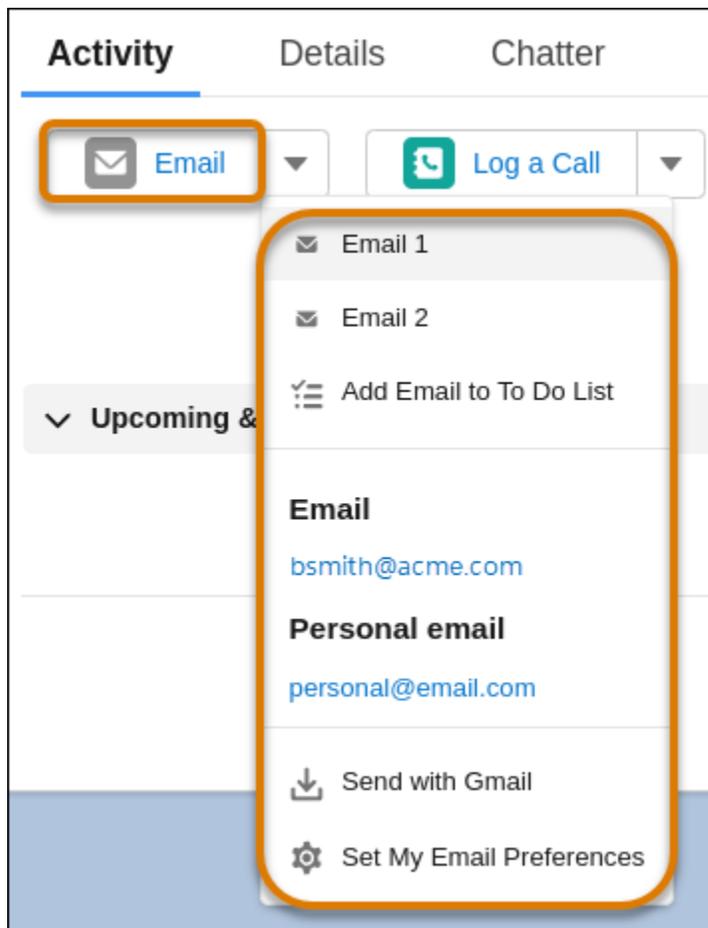
### EDITIONS

Available in Lightning Experience in all editions except **Starter**

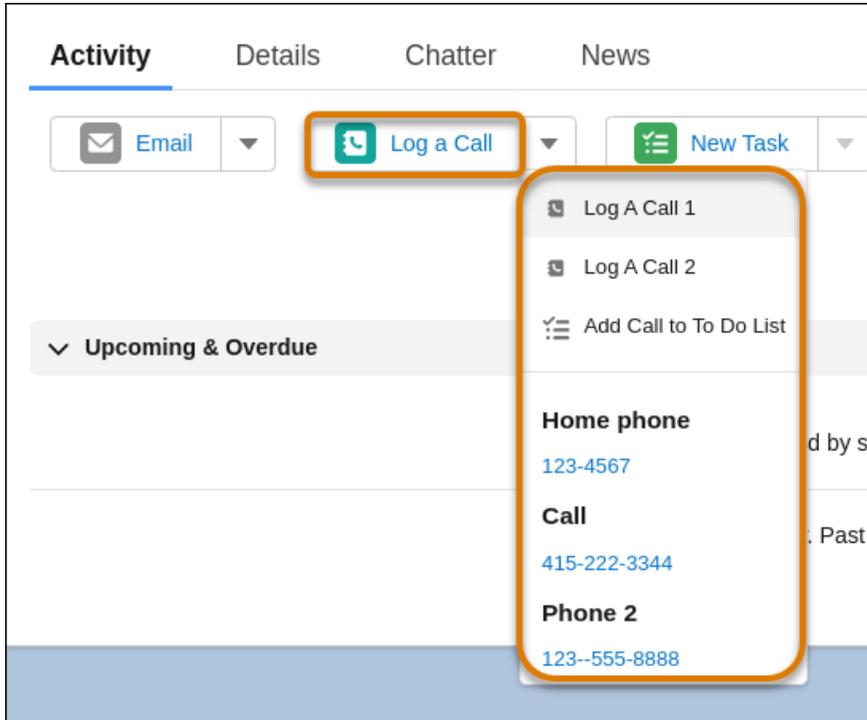
### USER PERMISSIONS

To add buttons to page layouts:

- Customize Application and Modify All Data



For Log a Call, custom actions such as Log A Call 1 and Log A Call 2 are of type Log a Call.



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.
3. Add additional custom actions to the page layout.

Name your actions intentionally. The button name is from the name of the first button action that's on the layout.

If the global action is on the page layout, it's assigned as the default button action. For a custom action to appear as the default button action, remove the global action from the page layout. Otherwise, the custom action appears in the dropdown of that action type.

New Task and New Event don't have actions defined already. You can add custom actions.

Make sure your users have permission to create tasks and events, log calls, and send email.

 **Note:** The **Send an Email** mobile action isn't supported on cases.

## 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 and Using Notes](#)

Before setting up Notes, review the requirement to add the Notes related list to page layouts, information about Notes in the Salesforce mobile app, and more.

### [Set Up Notes](#)

Enable Notes, add the Notes related list to page layouts, and let users create notes with actions.

#### EDITIONS

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

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

## Guidelines for Working with Notes

Review guidelines for creating and managing notes, including where to manage your notes, deleting notes, and note ownership.

### General Guidelines for Notes

- To create notes in Lightning Experience, you must use Notes. Your Salesforce administrator must enable Notes.
- To create a note associated with a record, you must have read access to the record.
- 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.
- 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 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.
- 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 mobile app).

#### EDITIONS

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

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

- 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 mobile 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're automatically taken to the notes editor page.
- In the Lightning Console, save the record you're working on before accessing Notes from the utility bar. Deleting or saving a Note refreshes the entire console page and any unsaved changes are lost.
- When you create a note in Lightning Experience, the note isn't saved until you enter a title or content. After the note is saved, further changes are saved automatically.
- In the Salesforce mobile app, create a task from a note by swiping a line on the note. Alternatively, tap 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 Relating Notes to Events

- You can't relate a note to a proposed event or to an invitee's copy of a multi-person event.
- You can't relate a note to a recurring event or to an individual event within an event series.

## Guidelines for Sharing Notes

- When sharing a note in Lightning Experience, you can only give other users viewer access, because Notes doesn't support simultaneous editing. If multiple people edit a note at the same time, they overwrite each other's content.
- You can't share notes in the Salesforce mobile app.
- Depending on your system settings, a note you share is shared with all users in your company when it's posted:
  - To a feed that all users can see
  - To a profile
  - To a record
  - To a public group

Ask your Salesforce administrator how Notes is configured at your company.

## 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 800 bytes.
- The size of the note body decreases by more than 20%.

## Guidelines for the Old Note-Taking Tool

- All notes that are 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**.

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

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 mobile 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.

#### EDITIONS

Available in: Lightning Experience

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

## 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.
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.

### EDITIONS

Available in: Salesforce Classic

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

## 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 that you don't want everyone to see. You could learn about an upcoming product launch, or the timing of a new initiative. Use private notes to record this information.

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 to the rep and who the rep has explicitly shared it with. Users with View All Data permission also have access to the note. However, you can't privately share notes in the Notes & Attachments related list.

In the partner portal, private notes work differently. Partners can't share private notes with anyone who isn't an administrator.

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**, and then click **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. Users with View All Data permissions also have access to the note.

- 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.

### EDITIONS

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

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

- 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.
  - If you change a note that's related to a record to a private note, the note is no longer related to the record. The owner of the note and users with View All Data Permissions can still see the note.

## 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  next to **View 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**.

## Considerations for Setting Up and Using Notes

Before setting up Notes, review the requirement to add the Notes related list to page layouts, information about Notes in the Salesforce mobile app, 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
  - In the process builder, when you enable new notes
- If **All Related Objects** is enabled for the User object in Feed Tracking, a note is shared with all users in your company when it's posted:
  - To a feed that all users can see
  - To a profile
  - To a record
  - To a public group

## Notes Limitations

- Notes added to contacts and opportunities don't roll up under the associated account.

### EDITIONS

Available in: Lightning Experience

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

### EDITIONS

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

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

- Notes aren't automatically added to the parent account.
- The Notes related list isn't supported in Visualforce pages.
- The New Note button isn't available on the Notes & Attachments related list, or as a global action in Lightning App pages in the Salesforce mobile app.

## Using Notes in Experience Cloud Sites

- Only internal users can create notes and only in Salesforce Classic. Notes appear in the Notes & Attachment section of the record. After a note is created, both internal and Experience Cloud site users can access it. The site user's level of access on the note depends on their level of access on the record.
- Both internal and Experience Cloud site users (with Customer Community, Customer Community Plus, and Partner Community licenses) can create Enhanced Notes using the New Note quick action on the record detail page in Experience Builder sites. Notes are available in the Notes related list. Enhanced Notes aren't available in sites created using Salesforce Tabs +Visualforce.
- Enhanced notes created by internal users aren't visible to Experience Builder site users.

## 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 mobile app.
- Private notes work differently in the partner portal. For example, partners can't share private notes with anyone who isn't an administrator.
- Sharing notes is only available in Lightning Experience and Salesforce Classic.
- Seeing all notes that you own from the Notes tab is only available in Lightning Experience and the Salesforce mobile app.

## Using Notes in the Salesforce Mobile App

Review considerations about Notes on the Salesforce mobile app.

 **Tip:** To see the Save and Cancel buttons when adding a note in the Salesforce mobile app, turn the phone so the display shows in landscape mode.

- You can access all your notes from the Notes item in the navigation menu. The Salesforce Classic version of the desktop site doesn't include a Notes tab. Instead, Salesforce Classic users can access notes from the **Files** tab.
- You can't share notes with other users or groups.
- In Salesforce for Android, you can't add images to notes. You can view images that were added from the desktop site. You can, however, add images to notes using Salesforce for iOS, version 10.0 or later.
- Some rich text options that are available in the desktop site, such as applying a bold or italic font or indenting a paragraph, aren't available. But you can view formatting that was added from the desktop site.
- You can't revert to previous versions of notes, but you can view previous versions.

- Spelling errors aren't highlighted while creating or editing notes.

## SEE ALSO:

[Set Up Notes](#)[Notes](#)[Turn Off Feed Tracking for Notes](#)

## Set Up Notes

Enable Notes, add the Notes related list to page layouts, and let users create notes with actions.

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 Mobile App Action Bar](#)

Add the **New Note** action to publisher layouts.

4. [Let Users Take Notes in the Salesforce Mobile App](#)

Make sure that your reps can create tasks from notes in the Salesforce mobile 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 and Using Notes](#)[Create Page Layouts](#)[Notes](#)

### EDITIONS

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

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

## 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**.

## 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: Salesforce Classic ([not available in all orgs](#)), Lightning Experience, and all versions of the Salesforce mobile app

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

### USER PERMISSIONS

To enable Notes:

- Customize Application  
View Setup and Configuration

### EDITIONS

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

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

### USER PERMISSIONS

To edit page layouts:

- Customize Application  
View Setup and Configuration

## Let Users Create Notes from the Chatter Publisher, Global Actions Menu, and the Salesforce Mobile App Action Bar

Add the **New Note** action to publisher layouts.

 **Note:** The New Note button isn't available on the Notes & Attachments related list or as a global action in Lightning App pages in the Salesforce mobile app.

1. 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 is 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](#)

## Let Users Take Notes in the Salesforce Mobile App

Make sure that your reps can create tasks from notes in the Salesforce mobile app and that Notes appears in the app navigation menu.

1. 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 mobile 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.

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

### USER PERMISSIONS

To edit publisher layouts:

- Customize Application  
View Setup and Configuration

### EDITIONS

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

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

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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

The screenshot shows the Salesforce Setup page for Feed Tracking. On the left, there is a list of objects with their respective tracked fields. On the right, the 'Fields in opportunities' configuration panel is visible, showing a list of fields with checkboxes for enabling feed tracking. The 'All Related Objects' checkbox is highlighted with an orange box.

Object	Tracked
Account	2 Fields
Activity	
Analytics Asset	
Asset	
Asset Relationship	
Authorization Form Text	
Badge	
Case	2 Fields
Communication Subscription	
Communication Subscription Channel Type	
Communication Subscription Consent	
Communication Subscription Timing	
Contact	3 Fields
Content Document	0 Fields
Contract	
Dashboard	
Endorsement	
Engagement Channel Type	
Enhanced Letterhead	
Event	
Group	7 Fields
Image	
Lead	3 Fields

**Fields in opportunities**

Save Cancel  Enable Feed Tracking Restore Defaults

You can select up to 19 fields.

Account Name	<input type="checkbox"/>	Amount	<input checked="" type="checkbox"/>
Close Date	<input checked="" type="checkbox"/>	Contract	<input type="checkbox"/>
Currency_custom	<input type="checkbox"/>	Description	<input type="checkbox"/>
Forecast Category	<input type="checkbox"/>	Last Stage Change Date	<input type="checkbox"/>
Lead Source	<input type="checkbox"/>	Next Step	<input type="checkbox"/>
Opportunity Name	<input checked="" type="checkbox"/>	Opportunity Owner	<input checked="" type="checkbox"/>
Opportunity Record Type	<input type="checkbox"/>	Private	<input type="checkbox"/>
Probability (%)	<input type="checkbox"/>	Quantity	<input type="checkbox"/>
Stage	<input checked="" type="checkbox"/>	Type	<input type="checkbox"/>
custom_number	<input type="checkbox"/>		

You can also display feed activity for **related** objects.

**All Related Objects**

Save Cancel  Enable Feed Tracking Restore Defaults

Repeat these steps for each object you want to turn off feed tracking for.

## Learn More About Social Intelligence Module

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The Social Intelligence Module (SIM) is a Salesforce package that runs inside Sales Cloud. SIM provides enhanced account-based listening and social selling strategies. With SIM, you can see information that is actionable and based on definable topics.

**!** **Important:** Salesforce is retiring the Social Studio family of products on November 18, 2024. Customers won't have access to Social Studio after the retirement date. Customers may continue to use Social Studio for the duration of their current contract or until November 18, 2024, whichever comes first. To learn more, see [Social Studio Retirement](#).

SIM takes advantage of the underlying technology of Social Studio to help you monitor your accounts, your competitors, and your industry. The topics that follow show how you can use SIM in various sales workflows. To use SIM as an admin, consult [Set up Social Intelligence Module in Your Organization](#).

### [Set Up the Social Intelligence Module](#)

If you're a Salesforce org admin, use these topics to help you install the Social Intelligence Module (SIM). You must have a Salesforce account with Lightning Experience enabled. And you need the right permissions to install packages and configure org-wide settings. This document isn't intended for Social Intelligence Module end users.

### [How the Components in the Social Intelligence Module Work](#)

After you install the Social Intelligence Module (SIM), the SIM adds new components to your Account, Opportunities, Leads, and Contacts pages in Sales Cloud. The new components are Top Posts View, Related Social Content, and Application Tab Page.

### [Register a Personal Twitter Account in the Social Intelligence Module](#)

With your personal Twitter account added to the Social Intelligence Module (SIM), you can use social actions on tweets received in SIM. You can only register one Twitter account at a time.

## Set Up the Social Intelligence Module

If you're a Salesforce org admin, use these topics to help you install the Social Intelligence Module (SIM). You must have a Salesforce account with Lightning Experience enabled. And you need the right permissions to install packages and configure org-wide settings. This document isn't intended for Social Intelligence Module end users.

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The installation process for the Social Intelligence Module is similar to other package installations. Go to a URL to start the process, select a few options, and then wait a short period while the package is added to your org. Install or upgrade SIM in a sandbox org before installing it in your production org. You can test compatibility and features before impacting your users. For information on using sandbox orgs and packages in general, refer to the Salesforce documentation and available Trailblazer trails.

### [Install the Social Intelligence Module](#)

You can install the Social Intelligence Module (SIM) in a sandbox org or a production org.

### [Configure Social Intelligence Module Authentication](#)

You can configure the Social Intelligence Module (SIM) to interact with Social Platform in Marketing Cloud Engagement.

### [Configure Permissions in the Social Intelligence Module](#)

For users to work in the Social Intelligence Module (SIM), they need the right permissions. After you give them the right permission, they can work in SIM.

### [Configure the User Interface for the Social Intelligence Module](#)

To use the Social Intelligence Module's (SIM) features, add the included SIM components to the individual record pages in your Salesforce interface. To view social data, you can also add SIM components to account, contact, or opportunity records. You must have the necessary permissions to configure the user interface.

#### SEE ALSO:

[External Link: Trailhead - Learn more about the Lightning Experience](#)

## Install the Social Intelligence Module

You can install the Social Intelligence Module (SIM) in a sandbox org or a production org.

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You must have admin permissions. If you aren't logged into the Salesforce org that you want to install SIM, log into that org.

1. Note the title of the install screen:

If you're installing SIM for the first time, you see **Install Social Intelligence Module**. If you're upgrading SIM, you see **Upgrade Social Intelligence Module**.

2. If the install requires a password, enter *Radian6#1*.

3. Select **Install for Admins Only**.

SIM shows a message confirming that you understand you're installing a Non-Salesforce Application not authorized for distribution as part of Salesforce's AppExchange Partner Program.

4. To accept, select the checkbox.

5. Click **Install**.

6. If SIM is a new install:

- a. Accept the permission for SIM to access a list of URLs. SIM must access those URLs to function.

The specific URLs all end in sfmc.co or radian6.com.

- b. Check all the URLs.

- c. To proceed with the install, select the **Yes, grant access to these third-party web sites** checkbox.

7. If SIM is an upgrade:

SIM doesn't prompt you to accept the third-party URLs because you already granted access to them when you installed SIM before.

SIM begins the actual installation process, which can take several minutes. SIM notifies you when the installation is complete. If you get the notification, confirm that you receive an email before proceeding with the configuration.

## Configure Social Intelligence Module Authentication

You can configure the Social Intelligence Module (SIM) to interact with Social Platform in Marketing Cloud Engagement.

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To configure your Salesforce instance, you need the right permissions.

1. Provide permissions for at least one user to administer SIM.
  - a. Navigate to **Setup > Permission Sets**.
  - b. Click the Social Intelligence Administrator License permission set link.
  - c. Click **Manage Assignments**.
  - d. To grant access to individual users, click the checkbox next to their name.
  - e. Click **Add Assignments**.
  - f. Repeat the same process, and assign the **Social Intelligence Administrator** permission set to the same users.

2. Configure the administrative tool.

Make sure that you're logged in as one of the users to which you assigned the permission sets. This user must access the Social Intelligence Module Admin app.

- a. To access or add more applications to your navigation bar, click the pencil icon.
- b. In Add Navigation Items, click **Add More Items**.
- c. Under Available Items, choose **All**.
- d. Search for the Social Intelligence Module Admin app.
- e. Click **+** beside the app, and then click **Add New Nav Item**.

Your tab has a new Social Intelligence Module Admin entry. A new form appears where you can authorize SIM with the social platform.

- f. Click **Authorize**.  
SIM indicates that it made a connection.

If you get an error message in the Social Intelligence Module, such as "No Posts Found," use **Refresh** to try to fix the connection to the social platform.

3. Now that you have the Social Intelligence Module set up, it's time to give users access and lay out the module on your record pages.

## Configure Permissions in the Social Intelligence Module

For users to work in the Social Intelligence Module (SIM), they need the right permissions. After you give them the right permission, they can work in SIM.

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Before you can assign permissions to other users, you must have adequate permissions to do so yourself.

1. In SIM, select **Setup > Permission Sets**.
2. Click the Social Intelligence Standard License permission set link.
3. Click **Manage Assignments**.
4. To give other users access, click the checkbox for each user.
5. Click **Add Assignments**.
6. Repeat the same process, and assign the Social Intelligence Standard permission set to the same users.

You can also assign permission sets to users individually while viewing their user records. Next, configure the SIM interface for your users.

## Configure the User Interface for the Social Intelligence Module

To use the Social Intelligence Module's (SIM) features, add the included SIM components to the individual record pages in your Salesforce interface. To view social data, you can also add SIM components to account, contact, or opportunity records. You must have the necessary permissions to configure the user interface.

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1. To add the SIM component to your Salesforce interface:
  - a. Navigate to the page where you want to embed the component.
  - b. Click  > **Edit Page**.
  - c. Drag the component onto the page.
  - d. Save the changes. If you haven't yet, to make sure that you activate your custom layout, click **Activation**.
2. To add the SIM component as a tab within a Lightning App:
  - a. Select **Setup > App Manager**.
  - b. Select the arrow dropdown next to Lightning App name, and click **Edit**.
  - c. In the Lightning App Builder, select **Navigation Items**.
  - d. Search for Social Intelligence, select it, and add it to your navigation.
  - e. Save the changes.

Your designated users can use Social Intelligence Module.

## How the Components in the Social Intelligence Module Work

After you install the Social Intelligence Module (SIM), the SIM adds new components to your Account, Opportunities, Leads, and Contacts pages in Sales Cloud. The new components are Top Posts View, Related Social Content, and Application Tab Page.

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### [Learn About the Top Posts View in the Social Intelligence Module](#)

The Top Posts view in the Social Intelligence Module (SIM) shows the most important Twitter data related to a record. It also shows the top 25 current social posts over the last 7 days and you can also engage with the posts.

### [View Related Social Content in the Social Intelligence Module](#)

When using the Social Intelligence Module (SIM), you see a new related social content view on Lead record pages. The view appears when these records are created from social data. It shows the social post and author data used to create the record. You are always aware of the origin of records created from social data in SIM.

### [Learn About the Application Tab Page in the Social Intelligence Module](#)

To search, sort, and filter more social data, use the Social Intelligence Module's (SIM) standalone application tab page. You can get greater insight into trends and conversations highlighted by the Top Posts view. You can also use the page to identify leads and opportunities, find communities, and authors to follow and engage with.

### [Learn About Posts and Actions in the Social Intelligence Module](#)

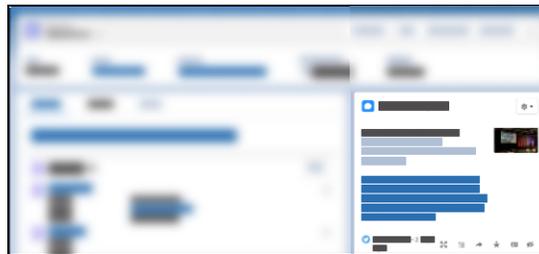
In the Social Intelligence Module (SIM), you can engage each post that appears in several ways. Engage the posts in the top posts view and the application tab page's post feed view. For example, you can expand the size of the post, create a task from the post, or share it on Chatter, among other actions.

## Learn About the Top Posts View in the Social Intelligence Module

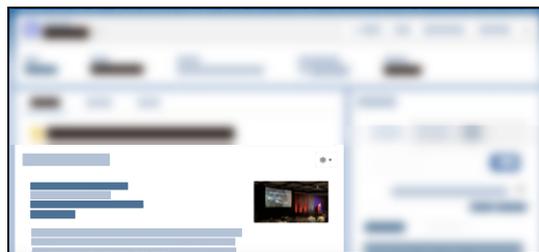
The Top Posts view in the Social Intelligence Module (SIM) shows the most important Twitter data related to a record. It also shows the top 25 current social posts over the last 7 days and you can also engage with the posts.

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Sometimes you see a separate component on your Account, Opportunities, Leads, and Contacts pages in Sales Cloud. Other times you have a separate tab on the page. The component could also be a separate tab on the page. In that case, the panel is called Social Intelligence.



Also, sometimes the component is listed among existing related components called Social Intelligence.



To see more top posts, other than those shown, click View More. The link goes to the [SIM Application Tab page](#) on page 1054. You can see all posts, not just the top 25 posts.

### [Configure Top Posts View in Social Intelligence Module](#)

As a user of the Social Intelligence Module (SIM), you can customize the Top Posts view to your needs. To tailor your social search to relevant information for the record, add and remove keywords in the configuration.

## Configure Top Posts View in Social Intelligence Module

As a user of the Social Intelligence Module (SIM), you can customize the Top Posts view to your needs. To tailor your social search to relevant information for the record, add and remove keywords in the configuration.

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Keep the following in mind when editing your configuration:

- Keywords must be at least three characters in length.
- You can have as many as 20 keywords in your configuration.
- Keywords can consist of multiple words surrounded by quotation marks. SIM matches that exact text you enter in the quotation marks. Adding multiple keywords with quotation marks counts as one keyword when considering the 20-keyword limit.
- The total length of the configuration can't exceed 255 characters, regardless of the number of keywords entered.

If your configuration doesn't meet these requirements, Social Intelligence Module shows you an error. You can still edit the configuration to meet the requirements.

**Tip:** Configure the Top Posts view with keywords beyond the business or person's name alone. To get the most out of the Social Intelligence Module, add such keywords to ensure that you capture the most important social information about your records.

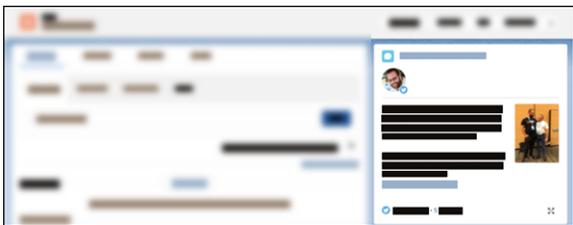
Changes you make affect all visitors to the page, so consider your configuration changes carefully.

1. To add, edit, or remove keywords, click  > **Configure**.  
The SIM Setup text temporarily replaces the component text.
2. Add, remove, or edit the existing keywords and the Top Posts view immediately reflects your configuration change.
3. To apply your changes and return to the Top Posts view, click **Finish** when you're ready.

## View Related Social Content in the Social Intelligence Module

When using the Social Intelligence Module (SIM), you see a new related social content view on Lead record pages. The view appears when these records are created from social data. It shows the social post and author data used to create the record. You are always aware of the origin of records created from social data in SIM.

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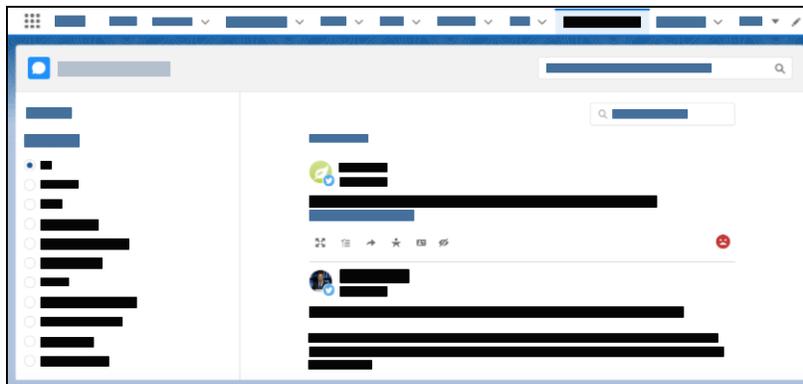


## Learn About the Application Tab Page in the Social Intelligence Module

To search, sort, and filter more social data, use the Social Intelligence Module's (SIM) standalone application tab page. You can get greater insight into trends and conversations highlighted by the Top Posts view. You can also use the page to identify leads and opportunities, find communities, and authors to follow and engage with.

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You can add the application tab page to your Sales Cloud tab bar for quick access. When adding tabs, look for Social Intelligence.



## Learn About Posts and Actions in the Social Intelligence Module

In the Social Intelligence Module (SIM), you can engage each post that appears in several ways. Engage the posts in the top posts view and the application tab page's post feed view. For example, you can expand the size of the post, create a task from the post, or share it on Chatter, among other actions.

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Icon	Name	Description
	Expand the post	Show a larger view of the post. With the larger view, you see related media in higher detail. With a Twitter post, you can see biographical information about the author. In the larger view, you can still perform other social actions.
	Create a task	Create a task from this post.
	Share on Chatter	Start a Chatter post linking to this social data. Currently, you can create the Chatter post on your own personal feed.
	Create a lead	Create a lead from this post.
	Create a contact	Create a contact from this post.
	Hide post	Sometimes low-quality content appears in your post views. SIM can filter out low-quality content, but some posts get through. When you find a post that is low quality or something that you want to hide, use the hide post button. When hidden, the post collapses. It still shows an entry in the feed. If you hid the post by mistake, click the restore link.

Icon	Name	Description
		Posts are hidden wherever the posts would otherwise appear and can affect the views of other users. Only use the hide button for truly low-quality posts.

### [Social Actions on Posts in the Social Intelligence Module](#)

After you register a Twitter account in Social Intelligence Module (SIM), you can do more with your Twitter posts. New social actions include following or unfollowing a Twitter author, liking a tweet, or replying to a tweet.

### [Change Language Settings in the Social Intelligence Module](#)

You can change the languages in the Social Intelligence Module (SIM) and customize it to derive category keywords in English, French, German, Italian, and Spanish. Any post that isn't classified in one of the supported languages, is categorized as Unknown. You can change the languages SIM supports.

## Social Actions on Posts in the Social Intelligence Module

After you register a Twitter account in Social Intelligence Module (SIM), you can do more with your Twitter posts. New social actions include following or unfollowing a Twitter author, liking a tweet, or replying to a tweet.

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### [Publish or Reply to a Tweet in the Social Intelligence Module](#)

You can engage with other Twitter accounts by publishing your own tweet or replying to an existing tweet right in the Social Intelligence Module (SIM).

### [View Personal Twitter Feed in the Social Intelligence Module](#)

When you register a Twitter account in the Social Intelligence Module (SIM), you can also view your personal Twitter feed from the Application Tab page or the Salesforce Home Tab.

## Publish or Reply to a Tweet in the Social Intelligence Module

You can engage with other Twitter accounts by publishing your own tweet or replying to an existing tweet right in the Social Intelligence Module (SIM).

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Before you can publish or reply to a tweet, connect a Twitter account in Social Intelligence Module.

1. In SIM, to publish a tweet:
  - a. On the Application Tab page, click **New Post**.
  - b. Enter your content, up to 280 characters.
  - c. To post your tweet, click **Post**.
2. In SIM, to reply to a tweet:
  - a. Click **Reply**.

For reference, the reply view appears with the post you're replying to.

- b. In the reply view, enter your reply, up to 280 characters.
- c. To send your reply, click **Reply**.

## View Personal Twitter Feed in the Social Intelligence Module

When you register a Twitter account in the Social Intelligence Module (SIM), you can also view your personal Twitter feed from the Application Tab page or the Salesforce Home Tab.

 **Important:** Salesforce is retiring the Social Studio family of products on November 18, 2024. Customers won't have access to Social Studio after the retirement date. Customers may continue to use Social Studio for the duration of their current contract or until November 18, 2024, whichever comes first. To learn more, see [Social Studio Retirement](#).

Before you can view your personal Twitter feed, connect a Twitter account in SIM.

1. To view your Twitter feed on the Application Tab page, click **Personal Twitter** in the Feeds section. Your feed populates with tweets so you can like or reply to them.
2. To view your Twitter feed on the Salesforce Home Tab, add the social feed component to your page.
  - a. Navigate to the Salesforce home page.
  - b. Click , and then click **Edit Page**.
  - c. In the Lightning App Builder, search for your personal social feed.
  - d. Drag the personal social feed to where you want it on your page.
  - e. Save your changes, and then click **Back**.

You don't have to configure your Salesforce Home tab again even if you use a different Twitter account. And even if you use a different Twitter account, your Salesforce Home Tab is already configured to show that account's feed.

 **Note:** You can see up to five posts in your feed. To see more posts, click **View More**, and your Twitter feed appears in the Application Tab page.

## Change Language Settings in the Social Intelligence Module

You can change the languages in the Social Intelligence Module (SIM) and customize it to derive category keywords in English, French, German, Italian, and Spanish. Any post that isn't classified in one of the supported languages, is categorized as Unknown. You can change the languages SIM supports.

 **Important:** Salesforce is retiring the Social Studio family of products on November 18, 2024. Customers won't have access to Social Studio after the retirement date. Customers may continue to use Social Studio for the duration of their current contract or until November 18, 2024, whichever comes first. To learn more, see [Social Studio Retirement](#).

1. In SIM, to edit your settings, click , and then click **Your Settings**.
2. From the languages tab, select the languages that SIM uses to populate posts.
3. Save the changes.

When you return to the application tab page, the posts derived from category keywords appear in the selected languages.

## Register a Personal Twitter Account in the Social Intelligence Module

With your personal Twitter account added to the Social Intelligence Module (SIM), you can use social actions on tweets received in SIM. You can only register one Twitter account at a time.

**Important:** Salesforce is retiring the Social Studio family of products on November 18, 2024. Customers won't have access to Social Studio after the retirement date. Customers may continue to use Social Studio for the duration of their current contract or until November 18, 2024, whichever comes first. To learn more, see [Social Studio Retirement](#).

If you have more than one Twitter account, make sure that you register the right account in SIM. Before completing the registration process, navigate to Twitter to log into your preferred Twitter account.

1. In SIM, go to the Application Tab page.
2. Click , then click **Your Settings**.  
At the Your Settings page, you can register or unregister your accounts.
3. To register your Twitter account, click **+ Connect New Account**.
4. To allow SIM to access your account, click **Authorize**.
5. To disconnect the account, click **Disconnect** next to the account.

## 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 are 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.

### EDITIONS

Available in: Salesforce Classic

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

### [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 org. This mapping syncs updates between the fields for all shared records. Before you map fields, look at these important best practices.

## 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.

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](#)

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.

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 edits the field. If your organization is set up to automatically accept records, workflow rules are triggered by any field you subscribed to.

### EDITIONS

Available in: Salesforce Classic

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

#### SEE ALSO:

[Salesforce to Salesforce](#)

## 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.

 **Note:** Switch to Salesforce Classic before enabling Salesforce to Salesforce. If you're using Lightning Experience, click your profile picture and select **Switch to Salesforce Classic**.

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 doesn't count towards the number of used licenses for your organization, and isn't 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 can't be modified and isn't 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.

### 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**

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.
  - 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.

### EDITIONS

Available in: Salesforce Classic

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

### [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.

### [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.

### [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.

#### 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**

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](#)

## 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.

1. 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 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.

### 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)

- 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
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.

### Invite One Business Partner to Connect

Invite a business partner to connect using Salesforce to Salesforce.

- Create an account and an associated contact for your business partner (if they don't already exist).
- Click the Connections tab.
- Click **New**.
- 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.
- Optionally, select a related account. The account associated with the connection can be changed after the invitation is sent.
- Choose a user to manage the connection.
- Optionally, choose a template to apply to the connection.
- 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:

- Manage Connections

## Invite Multiple Business Partners to Connect

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**.

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](#)

[Assign a Connection Template to a Connection](#)

## 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](#)

[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:

- Manage Connections

## 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.

### Create a Connection Template

Connection templates allow you to define object and field publishing rules that can be applied to one or more standard Salesforce to Salesforce connections.

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.

### Deactivate a Connection Template

You can deactivate a connection template that was previously created.

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.

### Assign a Connection Template to a Connection

You can assign connection templates to connections when inviting one or more new connections, or you can assign connection templates to existing connections.

#### 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:

- Manage Connections

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:

- 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:

- Manage Connections

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:

- Manage Connections

## 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**.



**Note:** If your business partner stops publishing an object to which you are subscribed, you are automatically unsubscribed from that object.

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.

These other considerations also apply.

- 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 :

- [Manage Connections](#)

## 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.

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.

 **Note:** Fields can only be mapped to fields with the same data type, length (for text and numeric fields) and decimal places (for numeric fields), so the drop-down list only shows fields with the correct data type. You can see the data type details of a published field by hovering your mouse over the information icon next to the field. Select `--None--` if you don't want to populate any of your fields with the data from a published field.

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 edits the field. If your organization is set up to automatically accept records, workflow rules are triggered by any field you subscribed to.

 **Tip:** You can also use Process Builder to automate your processes. If you want your process to perform an action after you create an S2S record, make sure to create a scheduled action rather than an immediate action to allow S2S time to process the created records. Immediate actions fire before shared record connection IDs are updated, resulting in shared records with no connection IDs. Updates to records without connection IDs cannot reach the subscribing system.

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:

### 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

### EDITIONS

Available in: Salesforce Classic

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

Workflow is available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

- `Received Connection Name` field on leads, opportunities, and custom objects
- `Current User` equals `pnct`
- `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. Create a workflow rule with specific criteria, then add a workflow task.

- 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".

When you accept a record, only certain fields trigger workflow rules.

Object	Fields Triggering Workflows
Account	<ul style="list-style-type: none"> <li>• Account Name</li> <li>• City</li> <li>• Country</li> <li>• Received Connection Name</li> <li>• Sent Connection Name</li> <li>• State</li> <li>• Type</li> </ul>
Case	<ul style="list-style-type: none"> <li>• Case Number</li> <li>• Priority</li> <li>• Status</li> <li>• Subject</li> <li>• Type</li> </ul>
Contact	<ul style="list-style-type: none"> <li>• Email</li> <li>• Last Name</li> <li>• Mailing Address</li> <li>• Phone</li> <li>• Title</li> </ul>
Lead	<ul style="list-style-type: none"> <li>• Company</li> <li>• Email</li> <li>• Industry</li> <li>• Lead</li> <li>• Lead Source</li> <li>• Name</li> <li>• No. of Employees</li> <li>• Phone</li> <li>• Received Connection Name</li> </ul>

Object	Fields Triggering Workflows
	<ul style="list-style-type: none"> <li>• Sent Connection Name</li> <li>• State</li> <li>• Status</li> <li>• Title</li> </ul>
Opportunity	<ul style="list-style-type: none"> <li>• Account Name</li> <li>• Amount</li> <li>• Close Date</li> <li>• Name</li> <li>• Received Connection Name</li> <li>• Sent Connection Name</li> <li>• Stage</li> </ul>
Custom Object	<ul style="list-style-type: none"> <li>• Connection Name</li> <li>• Name</li> <li>• Sent Date</li> </ul>

Sometimes it makes sense to use an Apex trigger instead of a workflow. Suppose that you have a workflow rule that updates 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 are reflected on the other record.

 **Note:** For existing S2S customers, records your connections share are available in the new user interface as long as their object type is supported in Lightning Experience; however, the Created By and Modified By fields are no longer displayed.

### [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.

#### EDITIONS

Available in: Salesforce Classic

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

### [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](#)

## 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.

#### 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:

- Manage Connections

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](#)

## 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 queue, 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 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.

### 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

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.

#### 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

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](#)

## 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.

## Guidelines for Using Salesforce to Salesforce

Review some guidelines for using Salesforce to Salesforce.

- Salesforce admins 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 connections that you want to stop sharing within the Selected Connections list. Use the arrows to move the connections to the Available Connections list. Save your changes.
- 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 org aren't reflected on the record in the connection's org. The shared record isn't deleted from the other org.
- 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 these 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.

### EDITIONS

Available in: Salesforce Classic

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

Workflow is available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

### EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

Workflow is available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

- The opportunity and the product associated with the opportunity product are shared with your connection.
- In the connection's org, the opportunity is associated with an active price book during acceptance.
- In the connection's org, the product is associated with the same active price book as the opportunity.
- In the connection's org, the product is active.
- In both orgs, the opportunity currency is the same.
- You can share a case comment as a child record of a case. The connection automatically accepts case comments, providing these criteria are met.
  - 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 isn't marked Private.
- If an error occurs when accepting a record, see the Connection History for details.
- If a related record is edited from an unshared record, the related record is no longer shared with a connection.
- 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 org. Likewise, if your business partner updates a field to which you've subscribed, it's automatically updated in your org. When your business partner updates the record, the Last Updated By field is 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've 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 isn't reflected in orgs that you had forwarded the records to in Salesforce to Salesforce. For example, suppose you perform a global find and replace that 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 are still in the Inactive stage in your partner's org. For the stage change to be reflected in their org, they must 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.
- After you accept a record, you can make it available to other connections in the same way that you can make any record available using Salesforce to Salesforce. In this way, you can work in a multi-tiered business network. In a multi-tiered network, changes made to the shared record in any org updates the information in all the orgs 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 org right away.
- If your connection continually syncs shared records between Salesforce orgs, you can encounter errors.
- Changes to the Last Modified Date field trigger a sync, even if no other field values change.
- When sharing opportunity products, keep these additional rules in mind.
  - If quantity or revenue schedules are enabled in the connection's org, the Quantity and Sales Price fields aren't updated in their org.
  - If the price book related to the opportunity product is changed or deleted in one org, the opportunity product is no longer shared.
  - If the opportunity is no longer shared, the opportunity product is no longer shared.

- If you're 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 org on a regular basis, select **Auto-Accept** 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 these 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, say you have a connection that acts as your third-party service agency. To escalate all cases that meet certain criteria 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.

### EDITIONS

Available in: Salesforce Classic

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

Status of Shared Record	Description
	 <b>Note:</b> If you change the Lead Status during conversion, it is not reflected in the subscribing connection.

## 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 org. This mapping syncs updates between the fields for all shared records. Before you map fields, look at these important best practices.

 **Important:** This information applies to standard Salesforce-to-Salesforce connections.

### 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. Click **Save** for your changes to take effect.
- For unmapped fields, Salesforce checks if the field's API name matches any of your fields. If no match exists, 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, and publish the field again.

- For a picklist field to be subscribable, the publishing and subscriber orgs' picklist field must:
  - Both restrict or both not restrict to values defined in the value set
  - Use the same API name for the picklist field

## Mapping Currency Fields

- When you map a currency field, and a record shared by your connection uses a currency that your org hasn't enabled:
  - The shared record's currency field isn't updated when your org auto-accepts the record
  - If you're manually accepting the record, the currency is updated only if your org uses the same currency as the record

For example, suppose that your connection has shared an opportunity with you. Your org uses only the euro. Your connection updates the opportunity amount to US\$300. The opportunity amount isn't updated in your record because your org doesn't support the U.S. dollar.

- When you map a currency field and either you or your connection changes the currency on a record containing that field:
  - Updates that you make to the field are no longer propagated to the other org
  - Updates that your connection makes to the field aren't reflected in your org
- You can map roll-up summary fields to currency fields with the same currency type. For example, a roll-up summary field 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 org and you subscribe to the Products object from that connection, you must:
  - Subscribe to all fields in the relevant Fields to Map column
  - Map each field to the matching fields in your org

Type of Schedule	Fields to Map
Quantity Schedule	<ul style="list-style-type: none"> <li>– <code>Number of Quantity Installments</code></li> <li>– <code>Quantity Installment Period</code></li> <li>– <code>Quantity Schedule Type</code></li> </ul>
Revenue Schedule	<ul style="list-style-type: none"> <li>– <code>Number of Revenue Installments</code></li> <li>– <code>Revenue Installment Period</code></li> <li>– <code>Revenue Schedule Type</code></li> </ul>

## 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 30 or more characters.
- You can map formula fields to fields of the same data type. For example, you can map a formula field that has a number data type to a field with a number data type. If a formula field is a text data type, you can map it to a text field of 80 or more characters.
- You can't map fields to formula fields. For example, you can map a formula field with a currency data type to a currency field, but you can't map a currency field 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)

## General Mapping Best Practices

- When publishing fields, consider sending your business partner information about the fields. This information helps them to create a mapping strategy that makes sense for your program.
- Translate your published custom field names into the languages that your partners use.
- 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, either:
  - The fields must be enabled in both your org and your partner's org
  - Your partner's org must be configured to auto-accept contacts

# Video Conferencing

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Let your sales reps use video conferencing to connect with customers remotely.

## [Zoom Integration](#)

Enable Zoom integration so reps can take advantage of automatic link creation in Salesforce Inbox and use Zoom as a video source in Einstein Conversation Insights. When Zoom integration is on, Zoom records meetings and makes them available to Salesforce.

## [Microsoft Teams Integration with Einstein Conversation Insights](#)

Enable Microsoft Teams video integration so reps can use it as a source in Einstein Conversation Insights. When integration is on, reps can record meetings and make them available to Salesforce.

## [Google Meet Integration](#)

Enable Google Meet video integration so reps can use it as a source in Einstein Conversation Insights. When integration is on, reps can record meetings and make them available to Salesforce.

## EDITIONS

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Available in: Lightning Experience

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Available with Salesforce Meetings in **Performance** and **Unlimited** Editions when Einstein Activity Capture is enabled

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Available with Inbox in Sales Cloud, which is included in **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

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Available with Sales Engagement in Sales Cloud, which is included in **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Sales Engagement is also available for an extra cost in Service Cloud and Lightning Platform.

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Available with Sales Cloud Einstein, which is available in: **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

## Zoom Integration

Enable Zoom integration so reps can take advantage of automatic link creation in Salesforce Inbox and use Zoom as a video source in Einstein Conversation Insights. When Zoom integration is on, Zoom records meetings and makes them available to Salesforce.

### [Set Up Zoom Integration](#)

Connect Salesforce with your company's Zoom account. Then sales reps can connect their Zoom accounts.

### [Use Zoom Integration](#)

When your company's Zoom integration is turned on, connect your Zoom account to take advantage of Zoom features in Salesforce.

#### SEE ALSO:

[Einstein Conversation Insights](#)

[Add Zoom Video Conferencing to the Outlook and Gmail Integrations with Inbox](#)

#### EDITIONS

Available in: Lightning Experience

Available with Salesforce Meetings in **Performance** and **Unlimited** Editions when Einstein Activity Capture is enabled

Available with Inbox in Sales Cloud, which is included in **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

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## Set Up Zoom Integration

Connect Salesforce with your company's Zoom account. Then sales reps can connect their Zoom accounts.

### [Turn On Zoom Integration](#)

Turn on Zoom integration for your Salesforce org. Accept the terms of service and approve the Salesforce app.

### [Select Who Can Access Zoom Integration](#)

Selecting who can connect their Zoom accounts is as simple as assigning a permission set to users. The permission set needs the Use Video Conferencing with Zoom app permission.

### [Manage Excluded Addresses and Domains for Video Integration Users](#)

Video meetings aren't recorded if any meeting attendee is on an excluded email domain or address list. This Excluded Addresses list applies to all video integration users. Users can add email addresses to their own Excluded Addresses list.

### [Turn Off Zoom Integration](#)

If your company no longer needs Salesforce connected with Zoom, turn off the Zoom integration. All users lose access to Zoom features in Salesforce, but still have access to existing recordings.

### [Manage Zoom Data](#)

Know where your Zoom meeting data is stored and how to manage it.

### EDITIONS

Available in: Lightning Experience

Available with Salesforce Meetings in **Performance** and **Unlimited** Editions when Einstein Activity Capture is enabled

Available with Inbox in Sales Cloud, which is included in **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

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Available with Sales Cloud Einstein, which is available in: **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

## Turn On Zoom Integration

### EDITIONS

Available in: Lightning Experience

Available with Salesforce Meetings in **Performance** and **Unlimited** Editions when Einstein Activity Capture is enabled

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Turn on Zoom integration for your Salesforce org. Accept the terms of service and approve the Salesforce app.

 **Important:** In Zoom, enable the Cloud recording and Audio transcript features so meetings and their transcripts are available to Salesforce. After enabling the feature in Zoom, it may take a few days before transcripts are available in Salesforce features such as Einstein Conversation Insights.

1. From Setup, in the Quick Find box, enter *Zoom Video Setup*, and then select **Zoom Video Setup**.
2. Accept the terms of service.
3. Select **Go to Zoom Marketplace** and approve install of the Salesforce Sales Cloud 360 app. To approve install, you need Zoom admin rights.

 **Note:** In Zoom Marketplace, if the **Install** button is disabled, and the page has a toggle titled **Approve install of this app**, then the Zoom admin must still approve the app.

In Zoom Marketplace, if the blue button **Visit Site to Install** is enabled, then the app has already been approved for installation.

4. Optionally, add excluded email addresses and domains. Meetings with attendees on the excluded lists aren't recorded.
5. Turn on Zoom integration. Sales reps are prompted in Salesforce to connect their Zoom accounts.

#### SEE ALSO:

[Connect Your Zoom Account](#)

[Zoom Help Center](#)

#### USER PERMISSIONS

To turn on Zoom video conferencing:

- Customize Application

OR

Modify All Data

To approve install of Salesforce Sales Cloud 360 in Zoom Marketplace

- Zoom admin rights

## Select Who Can Access Zoom Integration

Selecting who can connect their Zoom accounts is as simple as assigning a permission set to users. The permission set needs the Use Video Conferencing with Zoom app permission.

These permission sets already include the Use Video Conferencing with Zoom app permission:

- Sales Engagement Cadence Creator
- Sales Engagement User
- Sales Engagement Call Coaching User
- Inbox with Einstein Activity Capture
- Inbox without Einstein Activity Capture
- Sales Cloud Einstein

The permission set you're assigned determines which Zoom features are available to you.

### SEE ALSO:

[User Permissions](#)

[User Permissions](#)

### EDITIONS

Available in: Lightning Experience

Available with Salesforce Meetings in **Performance** and **Unlimited** Editions when Einstein Activity Capture is enabled

Available with Inbox in Sales Cloud, which is included in **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

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Available with Sales Cloud Einstein, which is available in: **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

### USER PERMISSIONS

To manager permission sets

- Customize Application
- OR
- Modify All Data

## Manage Excluded Addresses and Domains for Video Integration Users

Video meetings aren't recorded if any meeting attendee is on an excluded email domain or address list. This Excluded Addresses list applies to all video integration users. Users can add email addresses to their own Excluded Addresses list.

Use these steps to set up your company's excluded email addresses and domains and to manage the exclusions after the initial installation.

1. From Setup, enter *Video Settings* in the Quick Find box, then select the Video Setup page for a recording provider.
2. Click the **Excluded Addresses** tab.
3. Enter domains and email addresses in the Customer Domains, Internal Domains, and Email Addresses fields.

Activity capture solutions used in Sales Cloud, such as Einstein Activity Capture and Zoom integration, use the same Internal Domains list. Domains added or deleted from one feature affect all the solutions that use the Internal Domains list.

 **Note:** We automatically use the domain name of the admin's email address as the initial internal domain entry. You can't delete this entry, but you can add more internal domains.

Meetings with only internal attendees are not processed or added to Salesforce. This does not include internal meetings with users who aren't logged in with an internal domain. This might occur if users are logged in as a guest or are calling in from a meeting room. These calls are considered external and are processed.

Recorded meetings with only a single internal user (such as a sales pitch or other preparatory meeting) are processed like any other external meeting.

Video meetings aren't available if any meeting attendee is on an excluded email domain or address list. Typically, this scenario happens when attendees are external users.

You can specify excluded email addresses and domains before you turn on the video integration. Use the Excluded Addresses tab to manage the list of excluded addresses and domains.

### SEE ALSO:

[Exclude Emails and Events from Being Added to Salesforce](#)

### EDITIONS

Available in: Lightning Experience

Available with Salesforce Meetings in **Performance** and **Unlimited** Editions when Einstein Activity Capture is enabled

Available with Inbox in Sales Cloud, which is included in **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

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Available with Sales Cloud Einstein, which is available in: **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

### USER PERMISSIONS

To manage excluded addresses and domains:

- Customize Application
- OR
- Modify All Data

## Turn Off Zoom Integration

If your company no longer needs Salesforce connected with Zoom, turn off the Zoom integration. All users lose access to Zoom features in Salesforce, but still have access to existing recordings.

1. From Setup, in the Quick Find box, enter *Zoom Video Setup*, and then select **Zoom Video Setup**.
2. Turn off Zoom integration in the last step.
3. Confirm that you're turning off Zoom integration.

To turn Zoom integration back on, accept the terms of service. Sales reps are prompted to reconnect their accounts.

### SEE ALSO:

[Manage Zoom Data](#)

### EDITIONS

Available in: Lightning Experience

Available with Salesforce Meetings in **Performance** and **Unlimited** Editions when Einstein Activity Capture is enabled

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Available with Sales Cloud Einstein, which is available in: **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

### USER PERMISSIONS

To turn off Zoom video conferencing:

- Customize Application
- OR
- Modify All Data

## Manage Zoom Data

Know where your Zoom meeting data is stored and how to manage it.

Zoom stores the meeting recording, which includes the video and audio. Salesforce can access the recording.

Salesforce stores information about the meeting, such as the length of the meeting.

- When Zoom integration is turned off, data for existing recorded meetings and information is still available in Zoom. However, information isn't collected for future meetings.
- To permanently remove access from Salesforce to individual meeting recordings and information, use the Video Calls home page.
- To permanently remove access to meeting recordings and information based on the email address of the attendee, use Einstein Conversation Insights. From Setup, in the Quick Find box, enter *Delete Video Calls*, and then select **Delete Video Calls**.
- To permanently remove access to all meeting recordings and information, submit a GDPR request or uninstall the Salesforce app from your Zoom account.

Users can disconnect their Zoom accounts. To delete their individual data, they can uninstall the Salesforce app from their Zoom account.

### SEE ALSO:

[Einstein Conversation Insights](#)

[Disconnect Your Zoom Account in Salesforce](#)

[Uninstall the Salesforce App from Your Zoom Account](#)

[Data Deletion: Delete Personal Data](#)

### EDITIONS

Available in: Lightning Experience

Available with Salesforce Meetings in **Performance** and **Unlimited** Editions when Einstein Activity Capture is enabled

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Available with Sales Cloud Einstein, which is available in: **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

## Use Zoom Integration

When your company's Zoom integration is turned on, connect your Zoom account to take advantage of Zoom features in Salesforce.

### [Connect Your Zoom Account](#)

When an admin turns on the Zoom integration, users with the correct permission see a banner inviting them to connect their Zoom accounts.

### [Manage Excluded Addresses for Your Individual Video Provider Integration](#)

Your admin has specified email addresses and email domains for which meeting recordings and meeting information, such as start and end times, aren't available. That list applies to everyone in your company using video integration. You can also exclude email addresses that apply to your video integration only. If someone on either your list or the company's list is a meeting attendee, meeting recordings and information aren't available to Salesforce.

### [Troubleshoot Connecting Your Zoom Account](#)

Review possible reasons for why you can't connect to Zoom.

### [Disconnect Your Zoom Account in Salesforce](#)

If you don't use the Zoom features in Salesforce, you can disconnect your Zoom account.

### [Uninstall the Salesforce App from Your Zoom Account](#)

If you no longer use the Zoom features in Salesforce, in addition to disconnecting your Zoom account in Salesforce, uninstall the Salesforce app from your account in Zoom. You're asked if you want to keep your Zoom data in Salesforce.

## EDITIONS

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Available in: Lightning Experience

---

Available with Salesforce Meetings in **Performance** and **Unlimited** Editions when Einstein Activity Capture is enabled

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Available with Inbox in Sales Cloud, which is included in **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

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Available with Sales Cloud Einstein, which is available in: **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

## Connect Your Zoom Account

When an admin turns on the Zoom integration, users with the correct permission see a banner inviting them to connect their Zoom accounts.

1. Click **Take Me There** in the banner. Or, from Personal Settings, enter *Video Accounts* in the Quick Find box, then select **Video Accounts**.
2. Accept the terms of service.
3. Optionally, add excluded email addresses. Meetings with attendees on the excluded list aren't recorded.
4. To connect your account, click **Connect**.

Connect your company Zoom account to use Zoom with Salesforce. If another Salesforce user connects to the same Zoom account, meetings are no longer recorded for the previously connected user.



**Tip:** If you use Einstein Conversation Insights and Zoom is set up as a recording source, your individual recorded meetings are available in the Video Calls page.

### SEE ALSO:

- [Manage Excluded Addresses for Your Individual Video Provider Integration](#)
- [Troubleshoot Connecting Your Zoom Account](#)
- [Einstein Conversation Insights](#)

### EDITIONS

Available in: Lightning Experience

Available with Salesforce Meetings in **Performance** and **Unlimited** Editions when Einstein Activity Capture is enabled

Available with Inbox in Sales Cloud, which is included in **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

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Available with Sales Cloud Einstein, which is available in: **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

### USER PERMISSIONS

To enable Zoom video conferencing:

- Customize Application
- OR
- Modify All Data

## Manage Excluded Addresses for Your Individual Video Provider Integration

Your admin has specified email addresses and email domains for which meeting recordings and meeting information, such as start and end times, aren't available. That list applies to everyone in your company using video integration. You can also exclude email addresses that apply to your video integration only. If someone on either your list or the company's list is a meeting attendee, meeting recordings and information aren't available to Salesforce.

1. From Personal Settings, enter *Video Accounts* in the Quick Find box, then select **Video Accounts**.
2. Click the **Excluded Addresses** tab.
3. Enter email addresses in the **Email Addresses** field.  
For example, many users enter their personal email address. Then any personal video calls that they set up aren't recorded.

Meetings with only internal attendees are not processed or added to Salesforce by default.

### EDITIONS

Available in: Lightning Experience

Available with Salesforce Meetings in **Performance** and **Unlimited** Editions when Einstein Activity Capture is enabled

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Available with Sales Cloud Einstein, which is available in: **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

### USER PERMISSIONS

To manage excluded addresses

- Use Video Conferencing with Zoom

## Troubleshoot Connecting Your Zoom Account

Review possible reasons for why you can't connect to Zoom.

- You used an account other than your Salesforce account.  
Connect your company Zoom account to use Zoom with Salesforce. If another Salesforce user connects to the same Zoom account, meetings are no longer recorded for the previously connected user.
- You opened the Video Connected Account page before the Zoom integration finished setting up, and it's not ready for you.  
Before you can connect your Zoom account, your company's Zoom integration must be set up.
- Your company's Zoom integration was turned off before you connected.

### EDITIONS

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Available in: **Lightning Experience**

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Available with Salesforce Meetings in **Performance** and **Unlimited** Editions when Einstein Activity Capture is enabled

---

Available with Inbox in Sales Cloud, which is included in **Performance** and **Unlimited** Editions and available for an extra cost in **Professional** and **Enterprise** Editions. Inbox is also available for an extra cost in Service Cloud and Lightning Platform.

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## Disconnect Your Zoom Account in Salesforce

If you don't use the Zoom features in Salesforce, you can disconnect your Zoom account.

1. From Personal Settings, enter *Video Accounts* in the Quick Find box, then select **Video Accounts**.
2. Click **Disconnect** and confirm that you're disabling Zoom integration for your account. You lose access to Zoom features in Salesforce, but you can still access existing recordings.

If your company's Zoom integration is turned on, you can reconnect your Zoom account from Video Accounts in your personal settings.

### SEE ALSO:

[Uninstall the Salesforce App from Your Zoom Account](#)

### EDITIONS

Available in: Lightning Experience

Available with Salesforce Meetings in **Performance** and **Unlimited** Editions when Einstein Activity Capture is enabled

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### USER PERMISSIONS

To turn off Zoom video conferencing:

- Customize Application
- OR
- Modify All Data

## Uninstall the Salesforce App from Your Zoom Account

If you no longer use the Zoom features in Salesforce, in addition to disconnecting your Zoom account in Salesforce, uninstall the Salesforce app from your account in Zoom. You're asked if you want to keep your Zoom data in Salesforce.

1. Log in to your Zoom account and navigate to the Zoom App Marketplace.
2. Click **Manage**, then click **Installed Apps**.
3. Search for the Salesforce app and select it.
4. Click **Uninstall**.
5. Decide if you want to keep any Zoom data in Salesforce.

 **Warning:** If you choose not to keep Zoom data in Salesforce, the meeting recordings and information for all your Salesforce Zoom accounts—active and inactive—are deleted. This access can't be restored.

 **Note:** When you disconnect an account, it doesn't appear as disconnected until you log out of Salesforce and then log in again.

### EDITIONS

Available in: Lightning Experience

Available with Salesforce Meetings in **Performance** and **Unlimited** Editions when Einstein Activity Capture is enabled

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Available with Sales Cloud Einstein, which is available in: **Performance** and **Unlimited** Editions, and available for an extra cost in **Enterprise** Edition

## Microsoft Teams Integration with Einstein Conversation Insights

Enable Microsoft Teams video integration so reps can use it as a source in Einstein Conversation Insights. When integration is on, reps can record meetings and make them available to Salesforce.

Microsoft Teams support is limited to orgs under 30,000 users at the beginning of Spring '24.

 **Note:** Read All permission is required to give Einstein Conversation Insights access to Microsoft Teams call records. Access can't be limited at this time due to Microsoft Teams limitations. As with other recording providers, only recordings made by authenticated ECI users are processed internally. Microsoft Teams recordings are left on Teams servers and only transcripts and insights processed by ECI are stored in Salesforce.

Microsoft Teams meetings created within the context of a channel are not supported. Channel meetings are saved to SharePoint and are not processed.

Only non-channel meetings stored in OneDrive are supported for processing by Einstein Conversation Insights.

### [Data Security for Microsoft Teams Integration with Einstein Conversation Insights](#)

Data security is a top priority, and Einstein Conversation Insights only processes call records made by authenticated Einstein Conversation Insights users. Meetings are processed by Einstein Conversation Insights only if they are recorded by an ECI user and include external participants based on domain name, or recorded meetings that include only a single internal ECI user.

### [Configure Microsoft Teams Settings for Use with Einstein Conversation Insights](#)

Prior to enabling Microsoft Teams integration, make sure your Teams settings are configured for optimal use with Einstein Conversation Insights.

### [Turn On Microsoft Teams Integration](#)

Turn on Microsoft Teams integration for your Salesforce org. Accept the terms of service and enable video integration.

### [Connect Your Microsoft Teams Account](#)

When an admin turns on the Microsoft Teams integration, users with the correct permission see a banner inviting them to connect their Microsoft Teams accounts.

### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise**, **Performance**, and **Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

## Data Security for Microsoft Teams Integration with Einstein Conversation Insights

Data security is a top priority, and Einstein Conversation Insights only processes call records made by authenticated Einstein Conversation Insights users. Meetings are processed by Einstein Conversation Insights only if they are recorded by an ECI user and include external participants based on domain name, or recorded meetings that include only a single internal ECI user.

For policies and information around security and data storage for ECI overall, see [Security and Data Storage for Einstein Conversation Insights](#).

The Microsoft Teams integration with Salesforce utilizes the [OnlineMeeting](#) and [OneDrive](#) APIs, including the following user-level authorization scopes:

- **OnlineMeetings.Read:** Allows access to metadata of the online meetings attended by an ECI user.
- **Files.Read:** Enables access to the OneDrive folders of an ECI user to retrieve the latest recording files.
- **OnlineMeetingArtifact.Read.All:** Provides access to participant metadata from the online meetings attended by an ECI user.

### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise**, **Performance**, and **Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

The Microsoft Teams integration also utilizes the **CallRecords.ReadAll** app-level permission to access the metadata of call records, and also access the recording data associated with call records if they were recorded.

For Microsoft Teams, these authorizations are required to give Einstein Conversation Insights access to recordings.

As with other recording providers, only call records made by authenticated ECI users are processed internally. Microsoft Teams recordings are left on Teams servers and only transcripts and insights processed by ECI are stored in Salesforce.

## Configure Microsoft Teams Settings for Use with Einstein Conversation Insights

Prior to enabling Microsoft Teams integration, make sure your Teams settings are configured for optimal use with Einstein Conversation Insights.

A Microsoft Teams admin account is required to adjust these settings.

 **Note:** These settings are made in Microsoft Teams. For more information about the latest configuration requirements, check Microsoft Teams help resources.

1. From the Microsoft Teams admin center, navigate to Meeting Policies > Global org wide default > Recording and transcription. Make sure the Meeting Recording and Transcription toggles are on.
2. Set the time you want to keep the recording.  
The default is set to 120 days.
3. From Teams admin center, navigate to Meetings > Meeting policies. Then turn on Attendance & engagement reports.
4. In a New Meeting window, navigate to Options > Engagement. Check that Allow attendance report is on.
5. From Settings, navigate to the Privacy section. Check that Identify me in attendance reports is turned on.
6. With these settings enabled, verify that you can see the meeting attendance displayed under the Attendance tab in calls.

### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise**, **Performance**, and **Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

### USER PERMISSIONS

To enable Einstein Conversation Insights:

- Customize Application

To connect Microsoft Teams accounts

- Microsoft Teams admin access

## Turn On Microsoft Teams Integration

Turn on Microsoft Teams integration for your Salesforce org. Accept the terms of service and enable video integration.

 **Note:** Prior to enabling Microsoft Teams integration, make sure your Teams settings are configured for optimal use with Einstein Conversation Insights.

1. From Setup, in the Quick Find box, enter *Microsoft Teams Video Setup*, and then select **Microsoft Teams Video Setup**.
2. Accept the terms of service.
3. Optionally, [add excluded email addresses and domains](#). Meetings with attendees on the excluded lists aren't recorded.
4. Turn on Microsoft Teams integration.

Microsoft Teams admin credentials are needed to enable video integration.

To improve speaker identification, we recommend turning on [Einstein Activity Capture](#). Einstein Conversation Insights can use Einstein Activity Capture calendar integration to match call participants with existing contact records.

After video recording providers are enabled at the org level, users need to [connect their accounts](#) to use them with Einstein Conversation Insights.

## Connect Your Microsoft Teams Account

When an admin turns on the Microsoft Teams integration, users with the correct permission see a banner inviting them to connect their Microsoft Teams accounts.

1. Click **Take Me There** in the banner. Or, from Personal Settings, enter *Video Accounts* in the Quick Find box, then select **Video Accounts**.
2. Accept the terms of service.
3. Optionally, add excluded email addresses. Meetings with attendees on the excluded list aren't recorded.
4. To connect your account, click **Connect**.

 **Tip:** If you use Einstein Conversation Insights and Microsoft Teams is set up as a recording source, your individual recorded meetings are available in the Video Calls page.

Microsoft Teams meetings created within the context of a channel are not supported. Channel meetings are saved to SharePoint and are not processed by Einstein Conversation Insights. Only non-channel meetings stored in OneDrive are supported.

### EDITIONS

Available in: Lightning Experience

Available in Einstein Conversation Insights, which is available in **Enterprise, Performance, and Unlimited** Editions

Available for an extra cost in **Enterprise** Edition for use with more than 10 users

### USER PERMISSIONS

To enable Einstein Conversation Insights:

- Customize Application

To connect Microsoft Teams accounts

- Microsoft Teams admin access

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## Google Meet Integration

Enable Google Meet video integration so reps can use it as a source in Einstein Conversation Insights. When integration is on, reps can record meetings and make them available to Salesforce.

### [Set Up Google Meet Integration](#)

Turn on Google Meet integration for your Salesforce org. Accept the terms of service and enable video integration.

### [Connect Your Google Meet Account](#)

When an admin turns on the Google Meet integration, users with the correct permission see a banner inviting them to connect their Google Meet accounts.

## Set Up Google Meet Integration

Turn on Google Meet integration for your Salesforce org. Accept the terms of service and enable video integration.

1. From Setup, in the Quick Find box, enter *Google Meet Video Setup*, and then select **Google Meet Video Setup**.
2. Accept the terms of service.
3. Optionally, [add excluded email addresses and domains](#). Meetings with attendees on the excluded lists aren't recorded.
4. Turn on Google Meet integration.

To improve speaker identification, we recommend turning on [Einstein Activity Capture](#). Einstein Conversation Insights can use Einstein Activity Capture calendar integration to match call participants with existing contact records.

After video recording providers are enabled at the org level, users need to [connect their accounts](#) to use them with Einstein Conversation Insights. Google Meet accounts can be connected to a single user only, and users can connect to only one Google Meet account at a time.

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### USER PERMISSIONS

To enable Einstein Conversation Insights:

- [Customize Application](#)

## Connect Your Google Meet Account

When an admin turns on the Google Meet integration, users with the correct permission see a banner inviting them to connect their Google Meet accounts.

 **Note:** Users can connect to only one Google Meet account at a time. We don't support connecting multiple users to the same Google Meet account. We also don't support connecting a user to the same Google Meet account from multiple Salesforce orgs.

1. Click **Take Me There** in the banner. Or, from Personal Settings, enter *Video Accounts* in the Quick Find box, then select **Video Accounts**.
2. Accept the terms of service.
3. Optionally, add excluded email addresses. Meetings with attendees on the excluded list aren't recorded.
4. To connect your account, click **Connect**.

 **Tip:** If you use Einstein Conversation Insights and Google Meet is set up as a recording source, your individual recorded meetings are available in the Video Calls page. For Microsoft Teams, only non-channel meetings stored in OneDrive are supported for processing by ECI.

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### USER PERMISSIONS

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- Customize Application

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