Getting Microsoft Outlook and Salesforce in Sync

Salesforce, Winter ’27

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SYNCING MICROSOFT® OUTLOOK® AND SALESFORCE FOR OUTLOOK (RETIRING) BASICS

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 both Outlook and Salesforce are essential to your daily work routine, you can boost your productivity by automatically syncing between the two systems.

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.

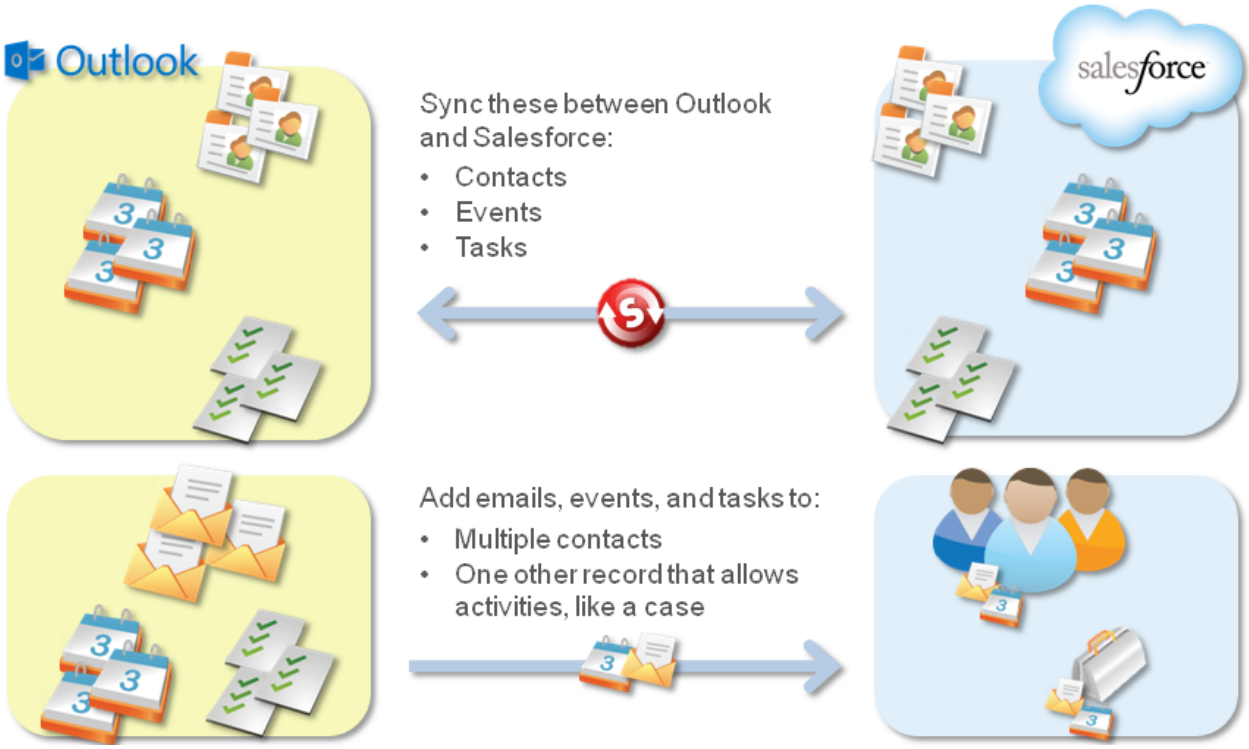
You can customize what you sync and the sync directions between Outlook and Salesforce. Your administrator determines the level at which you can customize these settings in Salesforce.

In this guide, you'll learn about the most essential details to get up and running with Salesforce for Outlook.

What Goes Where?

In most cases, organizations set up Salesforce for Outlook to sync contacts, events, and tasks both ways between Outlook and Salesforce. This keeps your data synced automatically. Your organization, however, may differ with what you can sync *and* the direction you sync. For example, your organization may sync only contacts and events from Salesforce to Outlook.

If your organization is set up to add email and share activities, you'll select only the emails you want to add to the Salesforce records of your choice. Specifically, you can add an email to multiple contacts, and to one other record with which you can associate tasks, such as an account, a case, or an opportunity.


Outlook
Sync these between Outlook and Salesforce:
• Contacts
• Events
• Tasks
salesforce
Add emails, events, and tasks to:
• Multiple contacts
• One other record that allows activities, like a case

GETTING A HIGH-LEVEL VIEW OF YOUR INTEGRATION WORK

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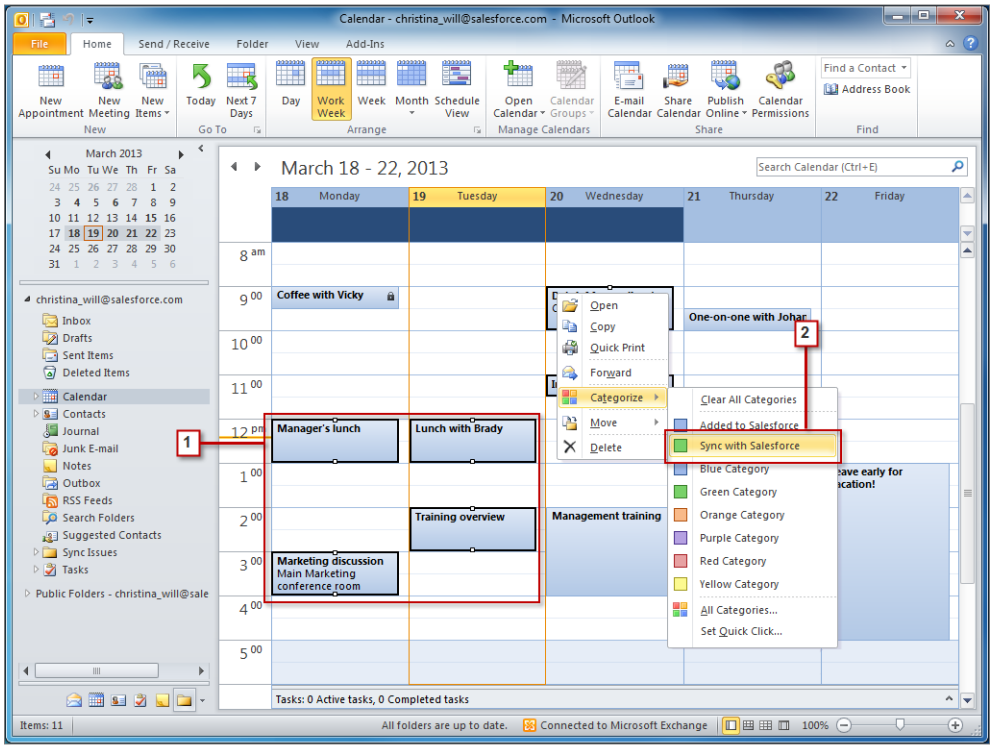
Let's quickly review how you'll complete your Outlook and Salesforce integration work using Salesforce for Outlook v2.2.0 or later.

Syncing Your Contacts, Events, and Tasks

Syncing items between Outlook and Salesforce is simple and automatic. Before any syncing occurs, you'll need to decide whether you want Salesforce for Outlook to sync all of your items, or only the ones you specify. If you choose to specify the items you want to sync, you'll do it like this.



1. Select items you want to sync. You can select multiple items when you press CTRL while clicking the items.
2. Right-click a selected item, then select **Categorize** > **Sync with Salesforce**. The items will sync automatically during the next sync cycle.

Working with Salesforce Records Directly in Outlook

We understand that you may spend a majority of your time selling to your customers while you work in Outlook. To help you along with the selling process, we've included the Salesforce Side Panel, which appears in Outlook.

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 or event's `From`, `To`, and `Cc` fields.

In addition, the Salesforce Side Panel:

SALESFORCE FOR OUTLOOK (RETIRING) SYSTEM REQUIREMENTS

Let's review these requirements before you download and install Salesforce for Outlook v2.2.0 or later.

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Basic Resource	Required Version
Salesforce for Outlook version	Salesforce for Outlook v3.0.0 or later after Salesforce Disables TLS 1.0 encryption protocol.
Default email program	Any of the following versions of Microsoft® Outlook® with the latest updates. • 2016 (32 bit and 64 bit) • 2013 (32 bit and 64 bit) • 2010 (32 bit and 64 bit) Salesforce for Outlook supports Outlook installed using Click-to-Run (a streaming installer for Microsoft Office).
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	Any of the following versions of Microsoft Windows®, along with the latest hot fixes. • Windows 10 • Windows 8.1 (Pro and Enterprise) • Windows 7 For customers using Apple® Mac OS®, consider setting up Outlook integration and Einstein Activity Capture.
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	We support using these systems that connect to the Internet through a proxy server. • Automatic proxy detection • Manual proxy • NTLM proxy authentication

Other Features	Requirement
	We don't support using: • IMAP and POP3 email servers. • Terminal servers, such as Citrix® servers. Consider setting up the Outlook integration and Einstein Activity Capture. • Proxy Automatic Configuration files (.pac).
Installers	If you're an IT administrator and plan to use the `.msi` installer, you need to install the following tools. • Microsoft .NET Framework 4.5.2, 4.6, 4.6.1, or 4.6.2 • Microsoft Visual Studio® 2010 Tools for Office Runtime • Primary Interop Assemblies (PIA) Redistributable for your version of Microsoft Outlook Windows 7 `.msi` users must run the command prompt as an administrator and then launch the installer from the command line. For example: *`msiexec /i SalesforceForOutlook.msi`*.
Single Sign-On	We support using either: • Delegated authentication • Security Assertion Markup Language (SAML) with My Domain We don't support using a separate online identity provider for single sign-on.

THE BIG PICTURE FOR SETTING UP SALESFORCE FOR OUTLOOK (RETIRING)

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Setting up Salesforce for Outlook is quick and easy.

1. From Salesforce, you download the Salesforce for Outlook installer.
2. You install Salesforce for Outlook on your computer, and then perform an easy configuration procedure.
3. Depending on the restrictions your administrator sets, you customize Salesforce for Outlook settings to sync what you want and indicate sync directions between Microsoft® Outlook® and Salesforce.

You can now continue to Download the Salesforce for Outlook Installer.

DOWNLOAD THE SALESFORCE FOR OUTLOOK (RETIRING) INSTALLER

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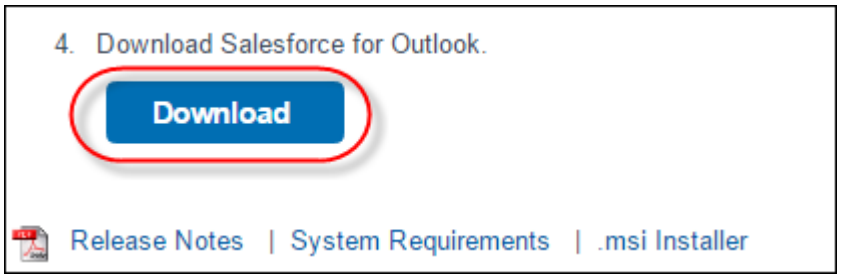
Download the installer from Salesforce.

1. Close Microsoft® Outlook®.
2. If you're downloading Salesforce for Outlook for the first time, continue to the next step. If you're upgrading, first close Salesforce for Outlook by right-clicking the Salesforce for Outlook icon ( ) 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.

Let's now continue to Install and Set Up Salesforce for Outlook.

INSTALL AND SET UP SALESFORCE FOR OUTLOOK (RETIRING)

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Now that you've downloaded the installer, you can begin the installation and setup process.

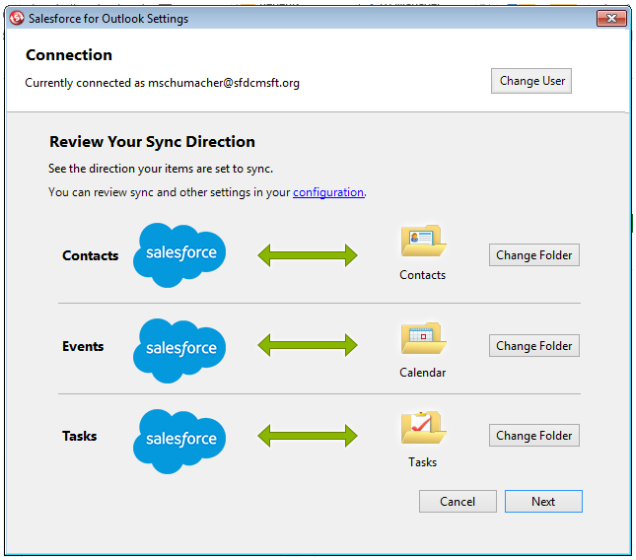
1. Open the installation file you downloaded and saved, and complete the installation wizard.

   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.

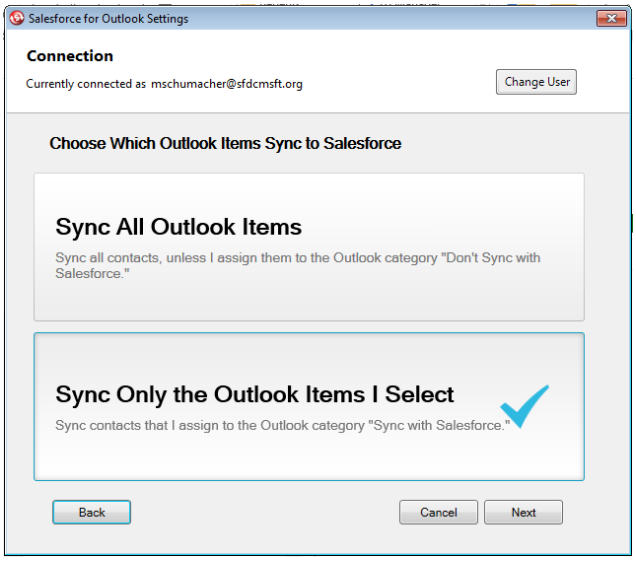
2. Open Microsoft® Outlook®. The setup wizard opens, and the Salesforce for Outlook icon ( ) appears in your system tray. If the wizard doesn't open, you can start it manually. Right-click and click **Settings**.
3. If you want to log in to a site other than the default, click **Change URL** and pick 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.

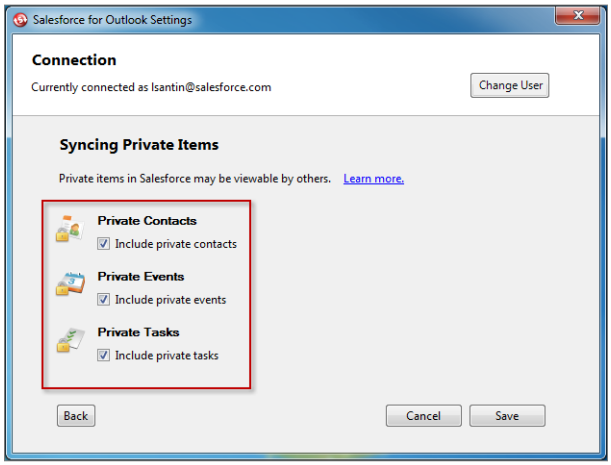
6. Click **Next**, and review the sync directions set up by your administrator. To sync your Outlook items to different folders, click **Change Folder** and select folders that are within your default folder or the main Mailbox folder.



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.

We'll now continue to Customizing Salesforce for Outlook.

CUSTOMIZING SALESFORCE FOR OUTLOOK (RETIRING)

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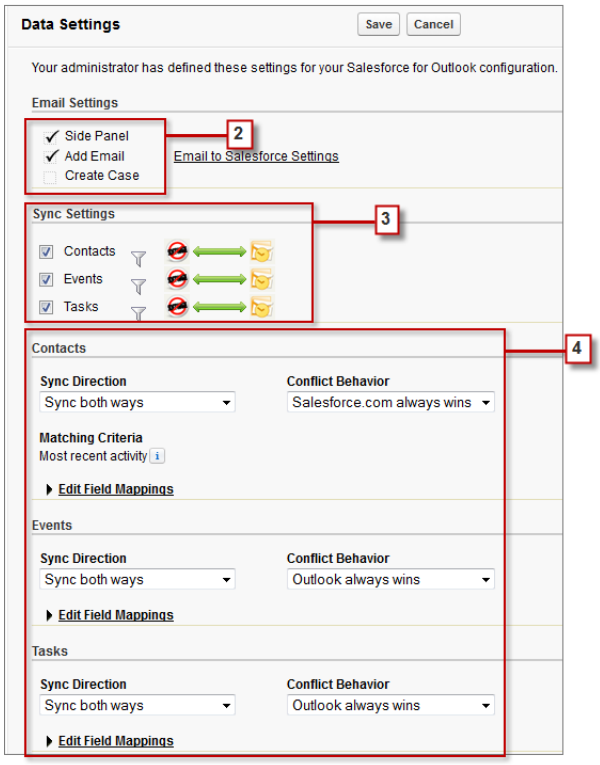
Depending on the restrictions your administrator sets, you may be able to customize:

- What you sync, including contacts, events, and tasks
- The direction you sync between Microsoft® Outlook® and Salesforce
- Your ability to manually add Outlook emails to Salesforce records

Now we'll review and adjust settings in your Salesforce for Outlook configuration.

1. Right-click the system tray icon ( ), and select **Salesforce.com** > **Outlook Configuration**.

   The following image shows how options appear if your administrator doesn't place restrictions on Salesforce for Outlook customizations.



2. Review your email settings, and make sure that both Side Panel and Add Email options are enabled. These settings are important because these options play a large role in helping you become efficient with your Outlook and Salesforce integration routine.
3. Review what you're set up to sync. If you want, you can change the types of items you sync here.
4. If you want to change sync directions and conflict behavior, use the dropdown lists.
5. Click **Save**.

You're now ready to continue to Sync Between Outlook and Salesforce for Outlook (Retiring).

SYNC BETWEEN OUTLOOK AND SALESFORCE FOR OUTLOOK (RETIRING)

When Salesforce for Outlook syncs your contacts, events, and tasks, it does so on a schedule.

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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.

Managing Items That Don't Assign Automatically to Salesforce Records

If details in the items you sync are either missing or duplicated, Salesforce for Outlook can't assign these items to Salesforce records. The best way to keep these unresolved items to a minimum is to use the Salesforce Side Panel for adding emails and events to Salesforce records, which we cover a little later.

- 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.

Let's continue to Add Emails, Events, and Tasks to Salesforce Records.

ADDING EMAILS, EVENTS, AND TASKS TO SALESFORCE FOR OUTLOOK (RETIRING) RECORDS

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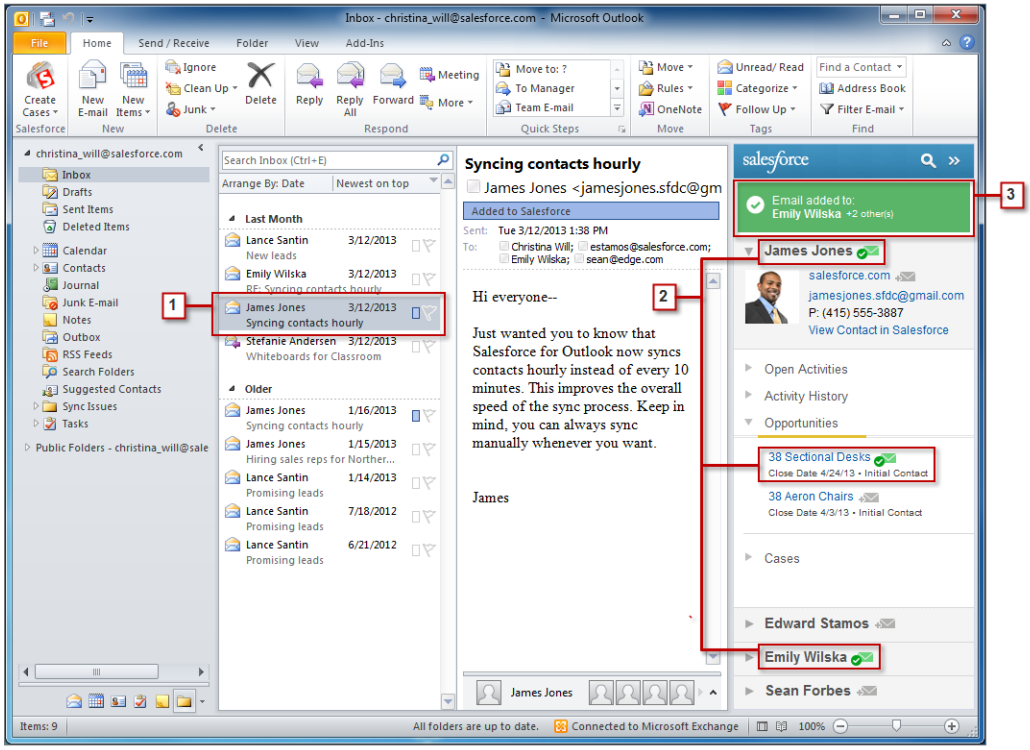
If you want to add important emails, events, and tasks to Salesforce records, doing so is a snap. Here's an example of how you add an email to Salesforce records. You add events the same way you add emails. Select an event from your Outlook calendar and go through the same steps.



1. Select an email in Outlook. The side panel displays Salesforce records related to the contacts in your email.
2. Next to each Salesforce record to which you're adding your email, click . After you add the email, the added email indicator appears next to those records.
3. Keep track of the records to which you added your email.

What's Next?

Now that you know the basics of syncing items and adding emails, review these Salesforce Help topics to learn how to keep your systems in sync.

- Managing Your Salesforce for Outlook Configuration
- Using the Salesforce for Outlook System Tray Application

- Salesforce for Outlook FAQ

Thanks for using Salesforce!