



# **Outlook Integration with Salesforce Set up Guide**

**Account Executive – Sales**

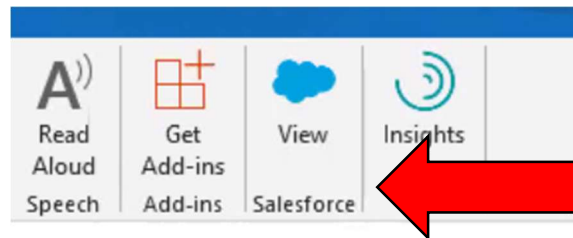


**LEARNING&DEVELOPMENT**

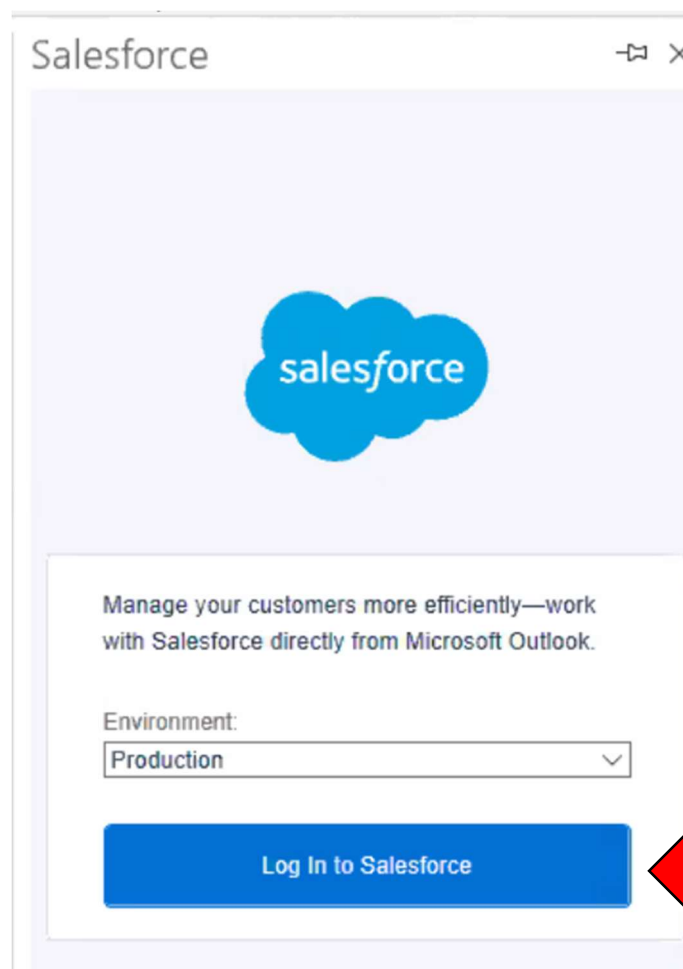


# Outlook Integration with Salesforce Setup Guide

1. Log into Outlook
2. Click the “View Salesforce” icon in the upper right part of the screen.  
**NOTE:** If not visible, click the three dots icon.

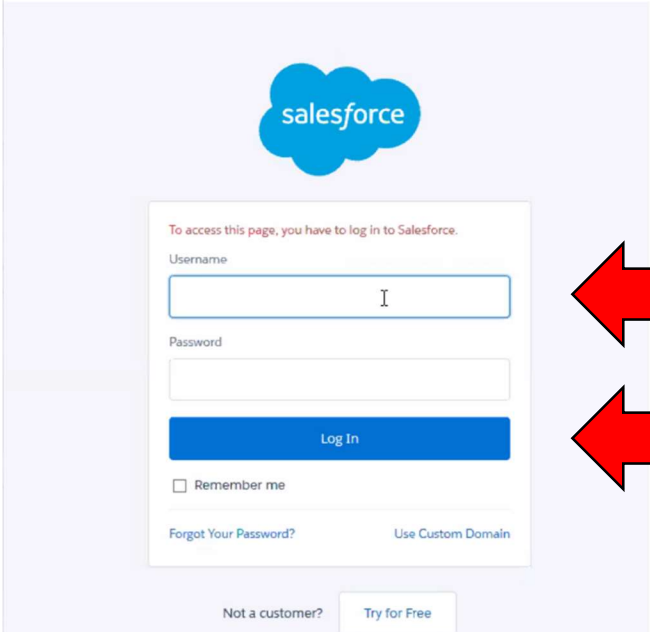


3. Confirm that the environment is “**Production**” then click the “**Log in to Salesforce**” button.



4. Enter your Salesforce username and password then click the “**Log In**” button.

Salesforce - <https://mailapp.force.com/clients/mailapp/signup.jsp?>

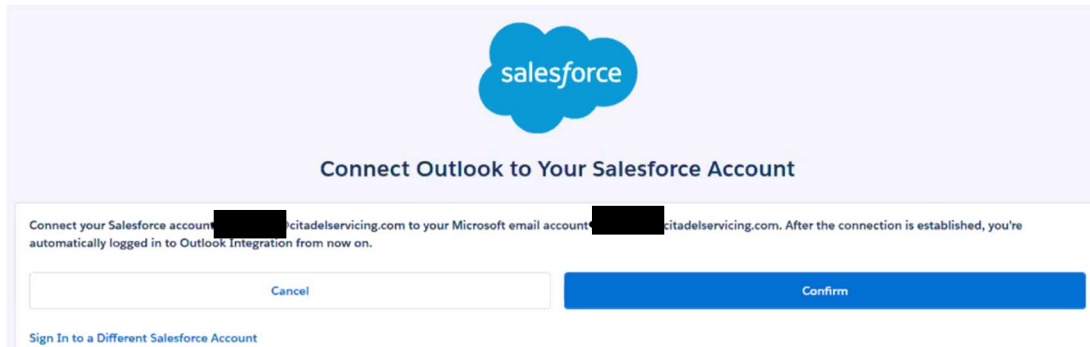


The image shows the Salesforce login page. At the top is the Salesforce logo. Below it is a message: "To access this page, you have to log in to Salesforce." The login form contains a "Username" field with a cursor, a "Password" field, and a blue "Log In" button. There is also a "Remember me" checkbox and links for "Forgot Your Password?" and "Use Custom Domain". At the bottom, there are links for "Not a customer?" and "Try for Free". Two large red arrows point from the right towards the Username and Password fields, and another red arrow points from the right towards the "Log In" button.

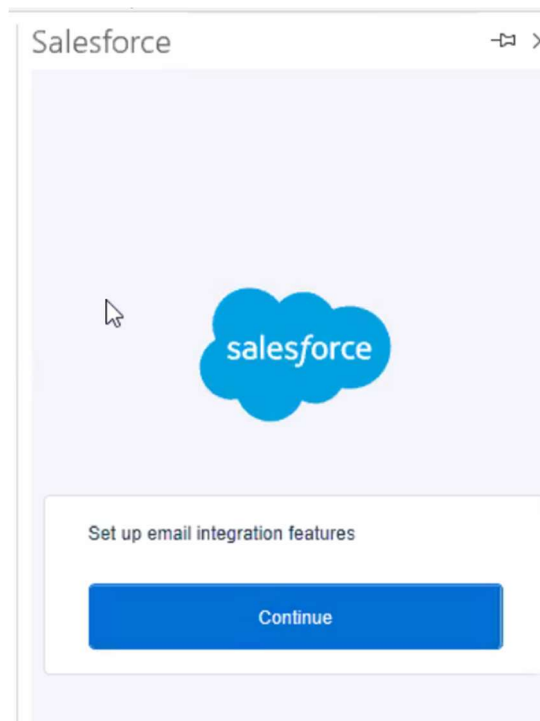
5. Follow the instructions for Multifactor Authentication and enter the **Verification Code** then click the “**Verify**” button.



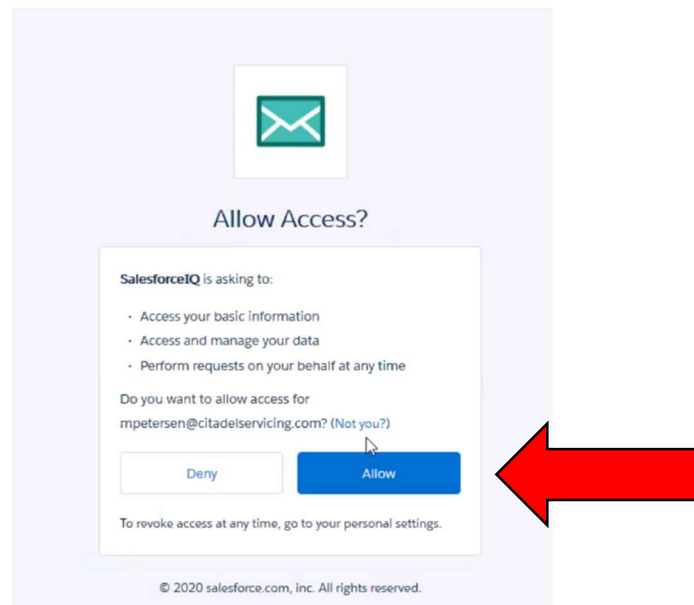
The image shows a verification code form. It has a label "Verification Code" above a text input field. Below the input field is a blue button labeled "Verify". A large red arrow points from the right towards the input field and the "Verify" button.



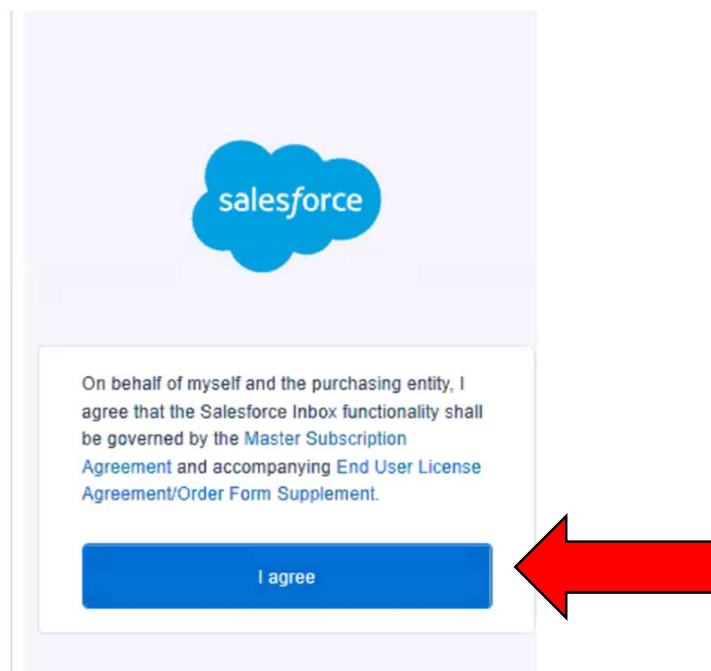
6. Review the account and, if correct, select the “**Confirm**” button.



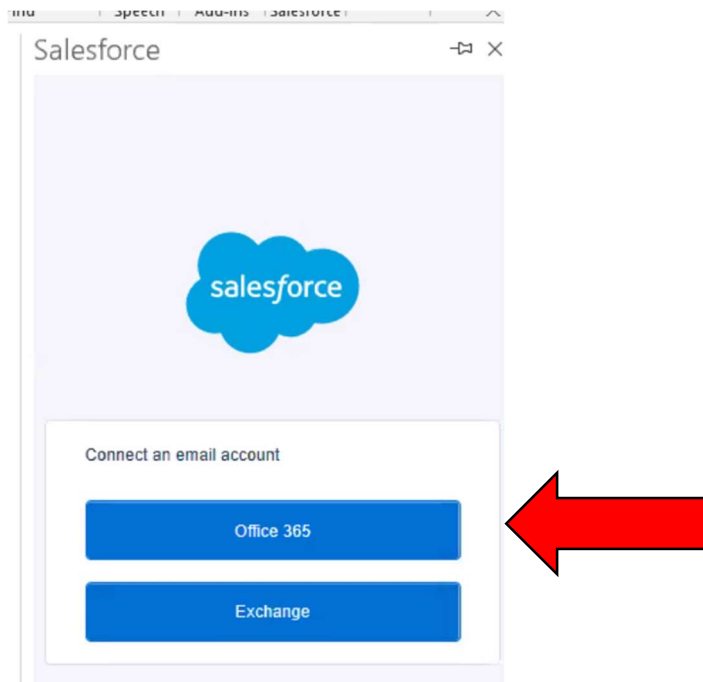
7. Click the “**Continue**” button.



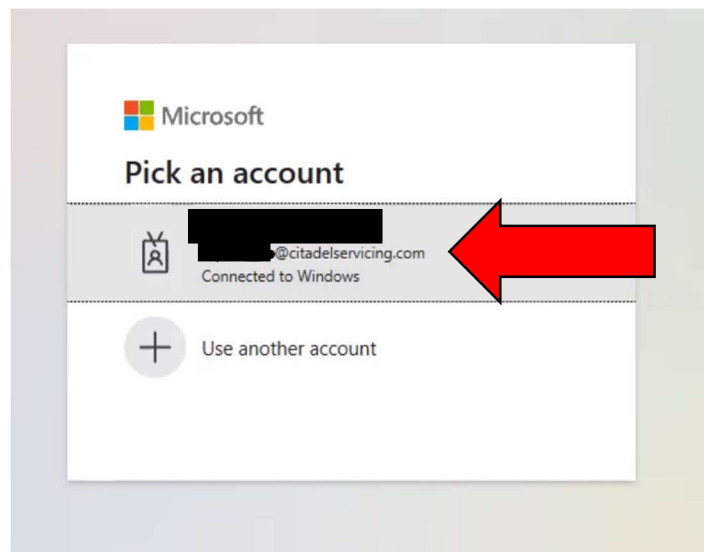
8. Select the “**Allow**” button.



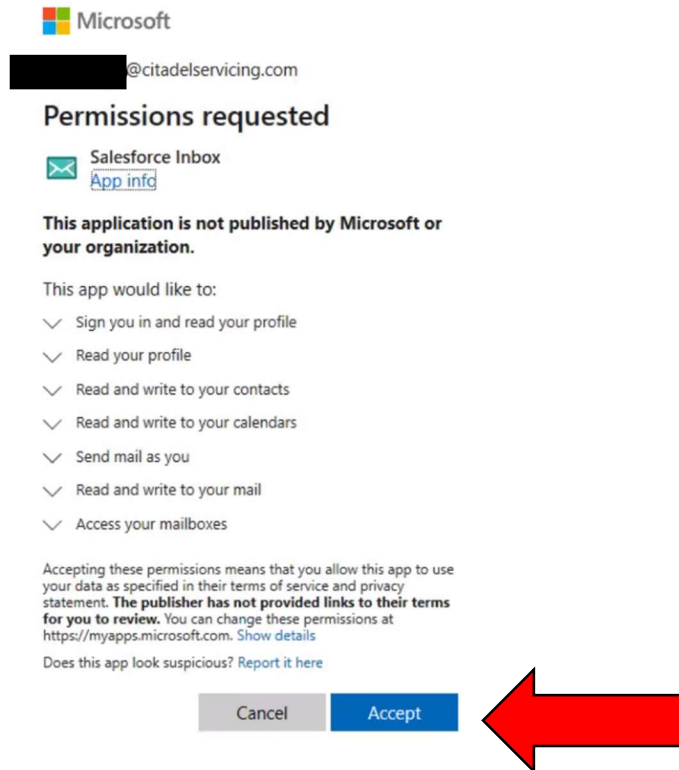
9. Click the “**I Agree**” button.



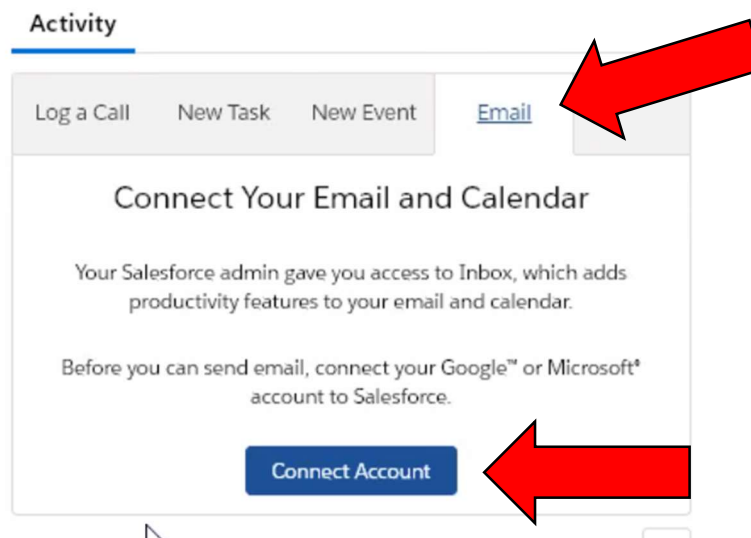
10. Select the "Office 365" button.



11. Select your Microsoft account.

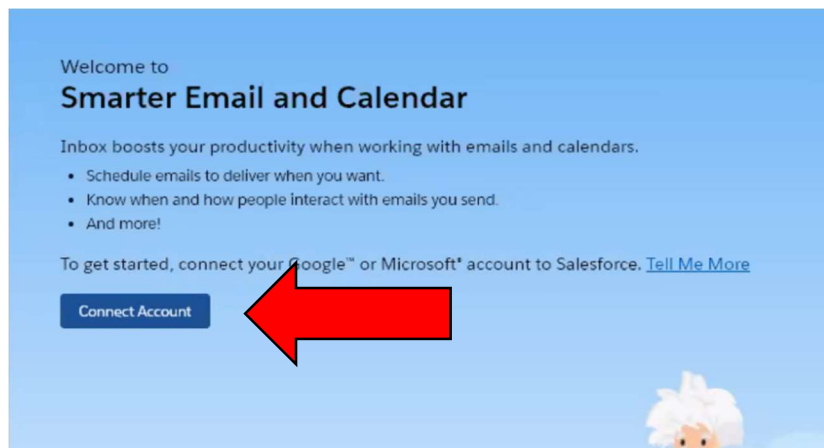


12. Select the **"Accept"** button.
13. Log into Salesforce using a web browser.
14. Navigate to any Account page.
15. On the right side of the page, in the Activity section, select the Email tab.

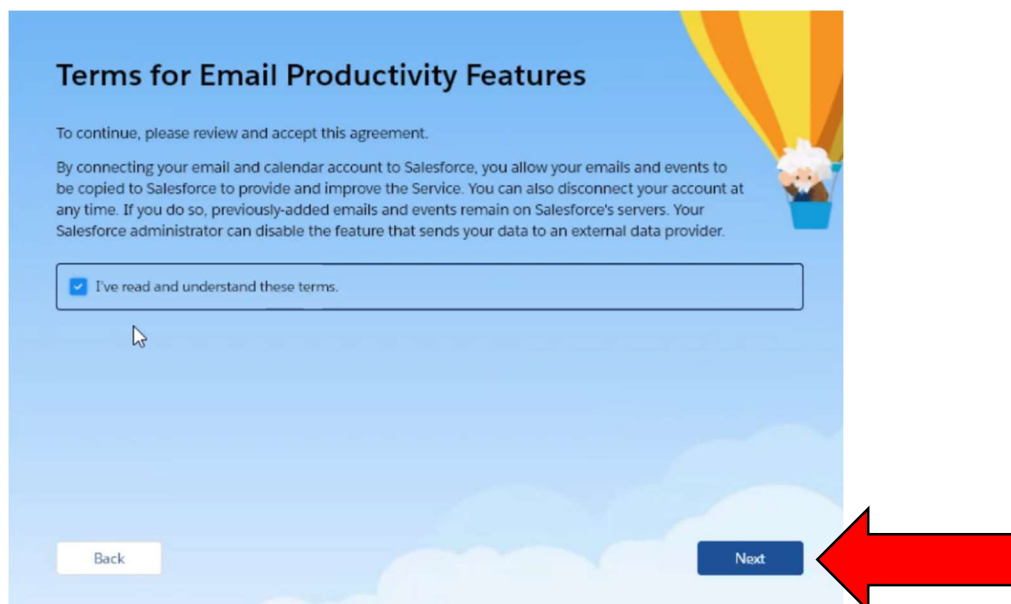


16. Click the **"Connect Account"** button.

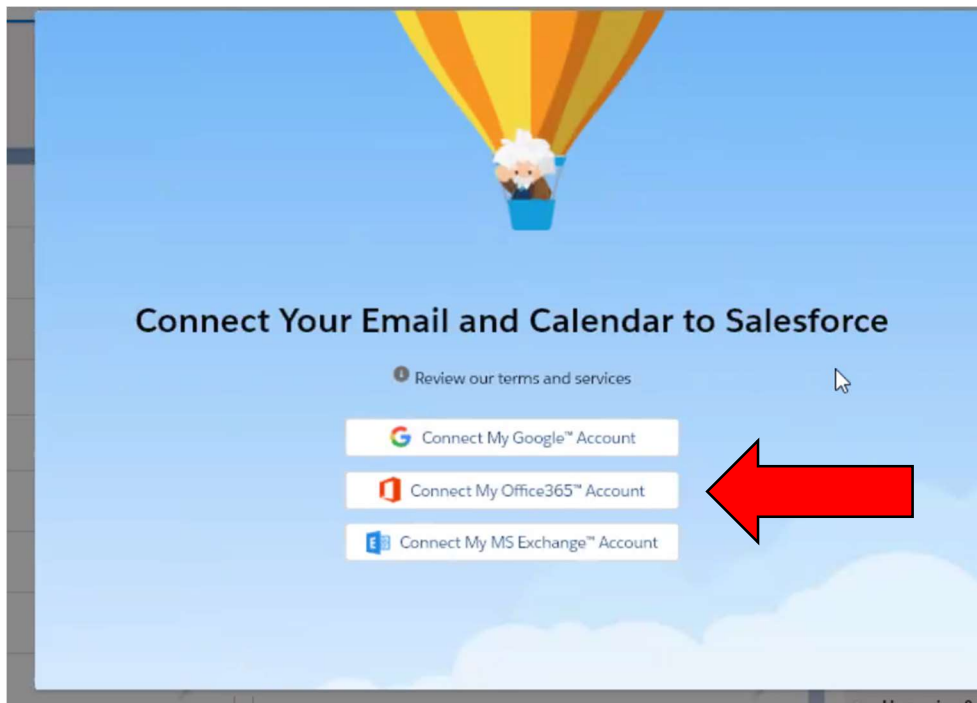




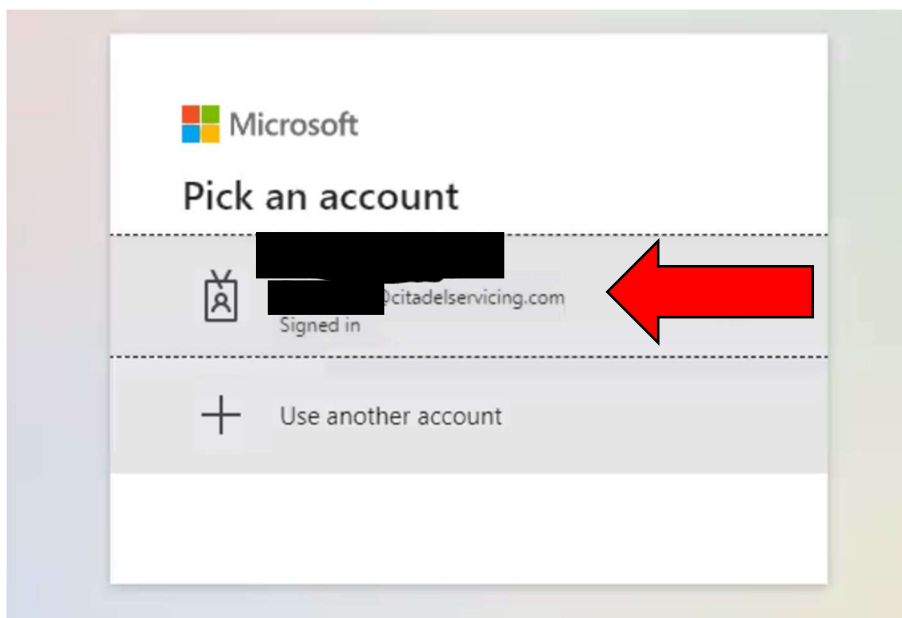
17. Click the “**Connect Account**” button.



18. Check the “**I’ve read and understand these terms**” checkbox then click the “**Next**” button.



19. Click the “**Connect My Office365 Account**” button.



20. Select your Microsoft Account.

The above steps should grant access to all of the functions covered in the Account Executive Salesforce User Guide. If you have any questions please contact [BusinessSolutions@citadelservicing.com](mailto:BusinessSolutions@citadelservicing.com) (or [Businesssolutions@acralending.com](mailto:Businesssolutions@acralending.com))

