

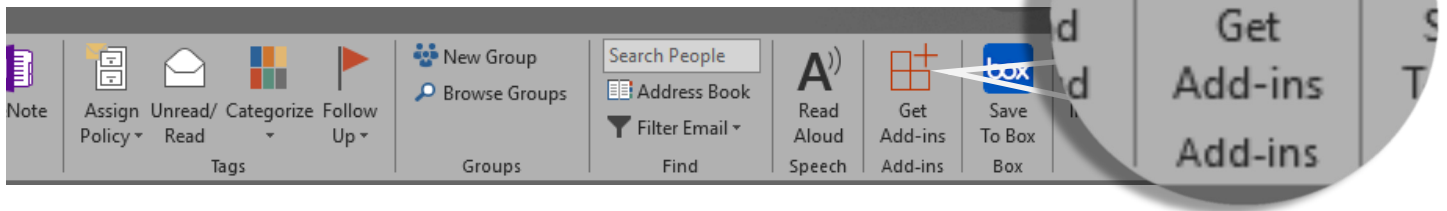


SALESFORCE ADD-IN FOR OUTLOOK

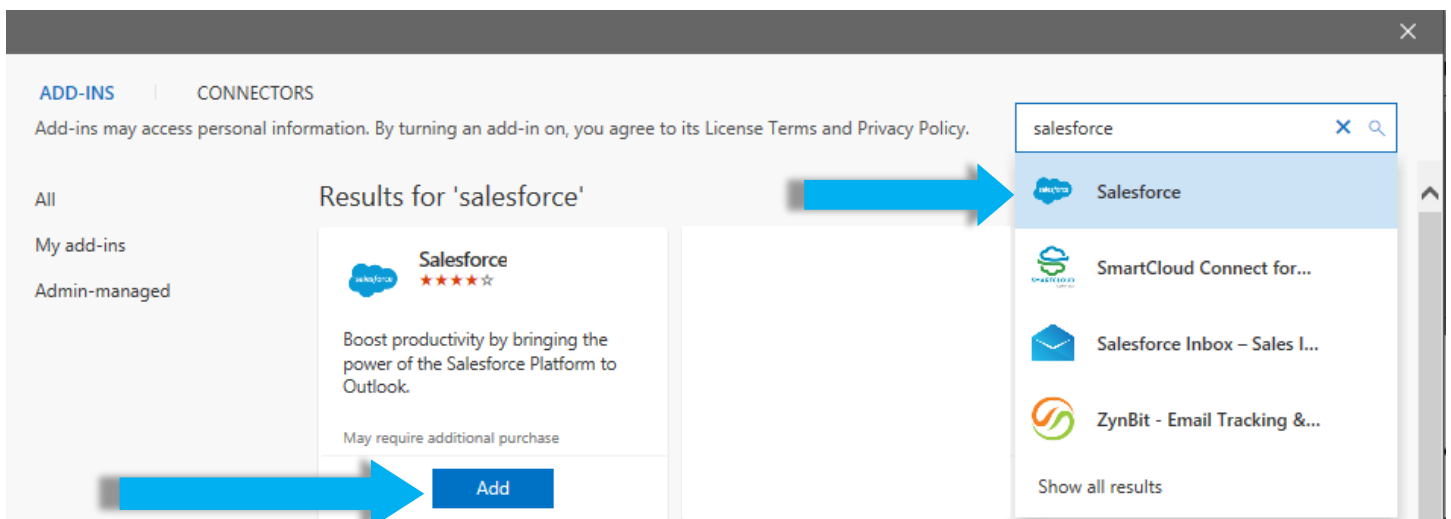
INSTALLATION AND USER GUIDE

INSTALLATION

01 In **Outlook**, select the **Get Add-ins** button



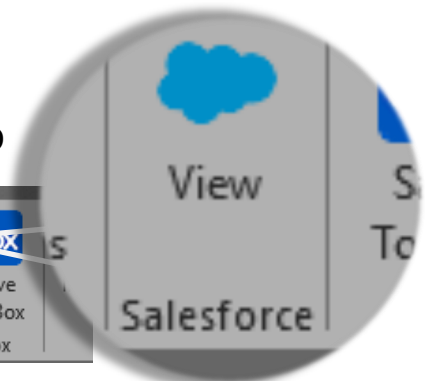
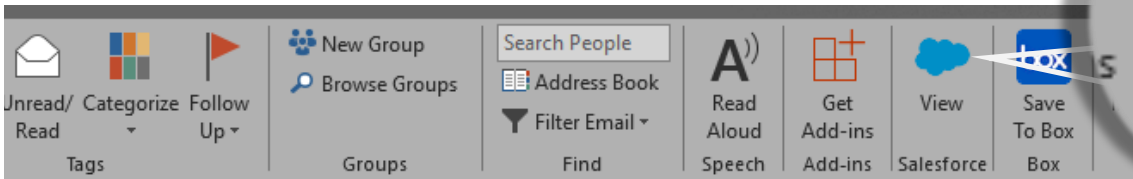
02 Search for **Salesforce** and select **Add**





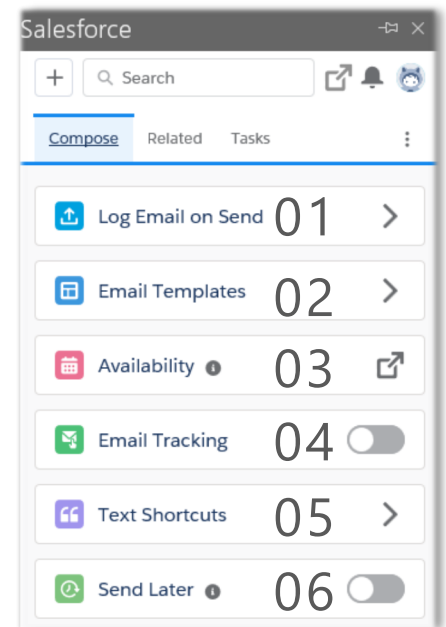
USING THE SALESFORCE ADD-ON

After installation, the **Salesforce Icon** will appear on your Outlook ribbon on the Home tab



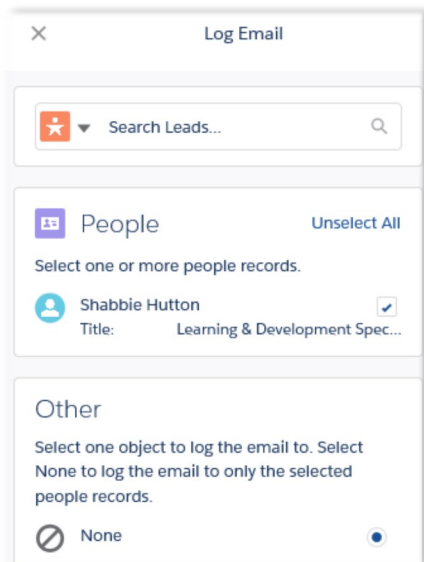
SEND EMAIL OPTIONS

When sending a new email or replying to one, click the Salesforce Icon on the ribbon to open the **Salesforce Panel** (right).



LOG EMAIL ON SEND

01 Use this feature to **sync email activity** to Salesforce from Outlook. This will log the email to a Lead, Account, Contact, Campaign or Opportunity that you **already have added** in Salesforce.



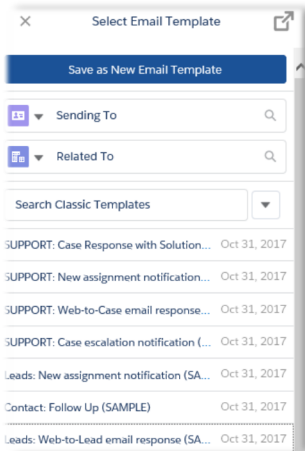
1. Search for the lead or account you want to synch the email to.

2. Click 



INSERT TEMPLATE

02 This feature will provide several marketing templates for you to quickly insert into your emails.



1. Select Email Templates

2. Choose from Classic: ALL in the dropdown

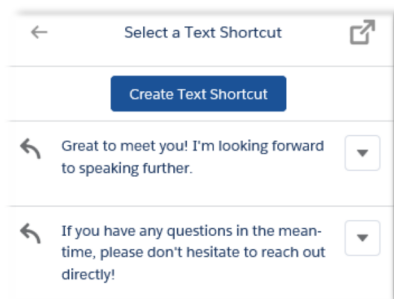
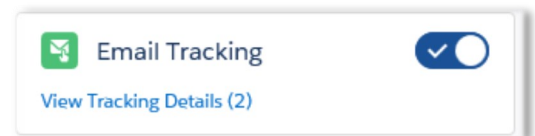
3. Click the template to insert in the email

AVAILABILITY

Use this to schedule meetings if you use Salesforce for reminders and tasks. **03**

EMAIL TRACKING

04 By **turning on** email tracking, Salesforce will log the related account or lead when the recipient opens and clicks any links contained in your email.

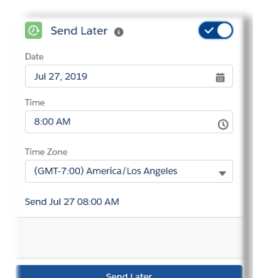


TEXT SHORTCUTS

Text Shortcuts will allow you to create custom quick-responses that can be inserted into your email reply. **05**

SEND LATER

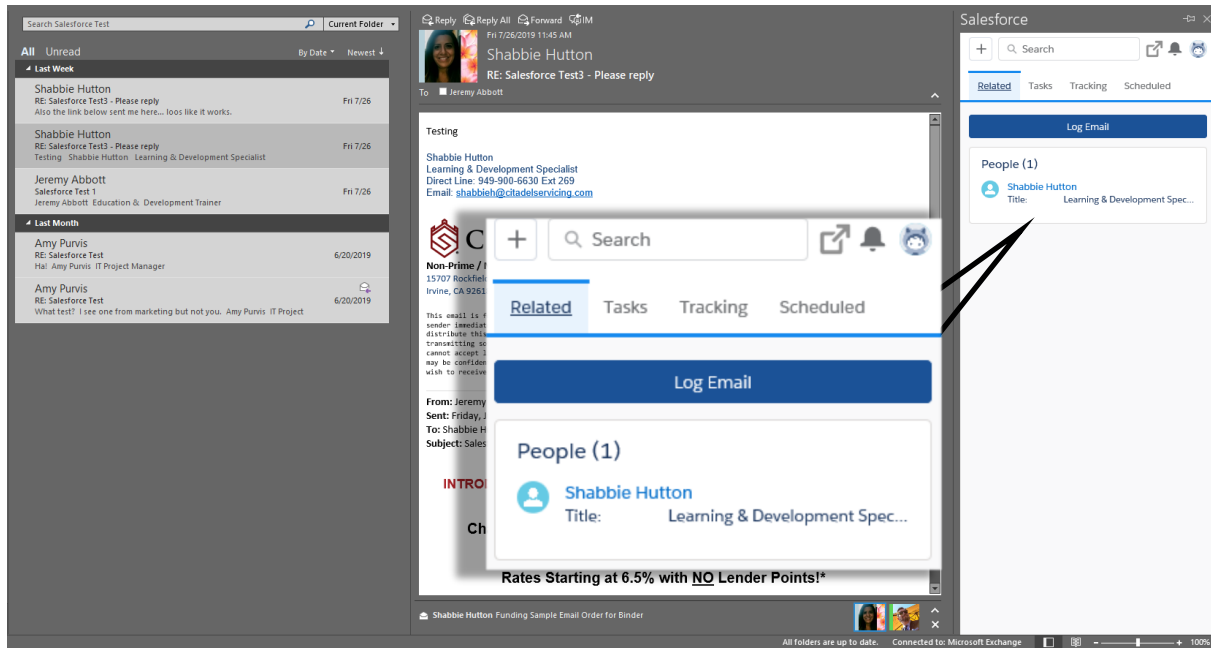
06 Specify a time to send an email. Salesforce will automatically send and log the email at the selected time and date.





EMAIL TRACKING AND RECEIVED EMAILS

Quickly log emails from recipients by opening the Salesforce panel and clicking "Log Email". This will sync to any contact, account or lead matches in Salesforce.



VIEW ACTIVITY IN SALESFORCE

When email activity is logged, you will be able to see all past activities in Salesforce by logging in and looking up the account, lead or opportunity.

