Salesforce for Outlook

This document provides the instructions for basic Salesforce for Outlook setup based on Babson College's configuration decisions.

For more information on using Salesforce for Outlook, see the Salesforce Trailhead Module: https://trailhead.salesforce.com/en/modules/microsoft_integration_admin_set_up_integration_products/units/microsoft_integration_admin_set_up_salesforce_for_outlook_unit_2

Salesforce for Outlook - Setup

Outlook integration can be enabled to help Babson College Salesforce users' maintenance of contacts, events, and tasks in attempt to keep this information current in Salesforce and in-sync between Microsoft® Outlook® and Salesforce.com.

Babson College has opted to use the following Salesforce for Outlook configuration:

- ***Contacts will not be automatically synced*** between Salesforce and Outlook. *(However, users can create contact in Salesforce from the Outlook side panel.)*
- ***Events will be a 2-way sync*** from Salesforce to Outlook AND Outlook to Salesforce. Conflicts will be resolved based on the configuration that Salesforce 'wins'.
    - Recurring Events will sync records where the Event End Date is within 30 days.
- ***Tasks will be a 2-way sync*** from Salesforce to Outlook AND Outlook to Salesforce. Conflicts will be resolved based on the configuration that Salesforce 'wins'.
    - Recurring Tasks will sync records when the Task End Date is within 30 days.

Installing and Setting Up Salesforce for Outlook

Salesforce for Outlook: **Your Name** > **My Settings** > **Desktop Add-Ons** > **Salesforce for Outlook**

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

    * Note that 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. You then need to 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. Just right-click 🔴 and click **Settings**.

3. If you need to log in to a Salesforce 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 Salesforce username and password.

5. Click **Approve**. This creates a secure connection between Outlook and Salesforce. You won't need to log in again unless you encounter an error.

   * Note that 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. This lets you connect without IP restrictions from anywhere.

6. Click **Next** and choose the folders you want to sync. If you need to select different folders, click **Change Folder** and select ones that are within your default folders or the main Mailbox folder.
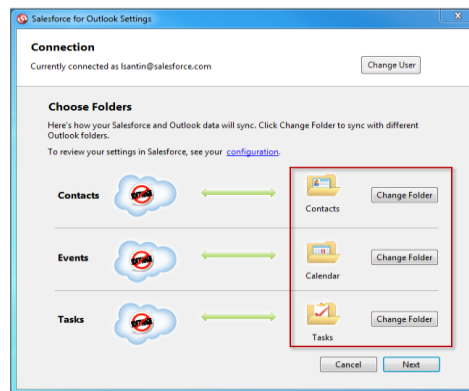
7. Click **Next** and then choose your sync method. If you want to:
   - Select the individual events, and tasks to sync, select **Manual**.
   - Have Salesforce for Outlook sync all of your events, and tasks, select **Automatic**.
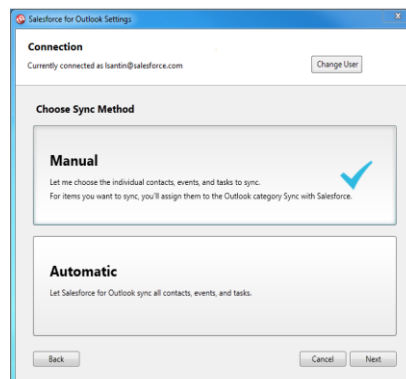
8. Click **Next**, and then select the kinds of private items you want to sync.
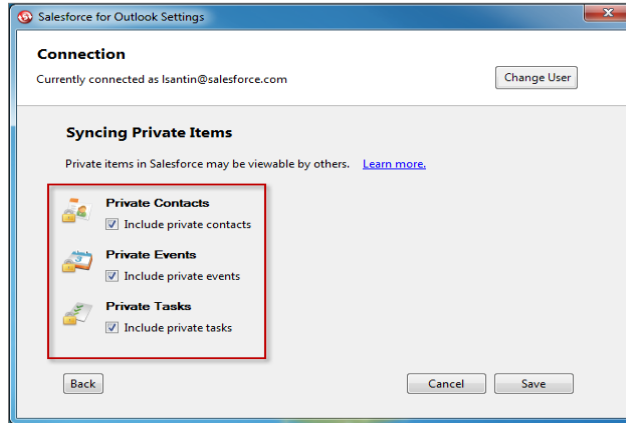
9. Click **Save**. A welcome message appears at the system tray icon (⊙), which is now active. If you're configured to sync Outlook items, and you chose Automatic for your sync method, all items in the folders you chose sync automatically. The icon spins during every sync cycle

Sync Schedules

Salesforce for Outlook syncs your items based on your system activity.
- Events and tasks sync automatically every ten minutes;
- 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.
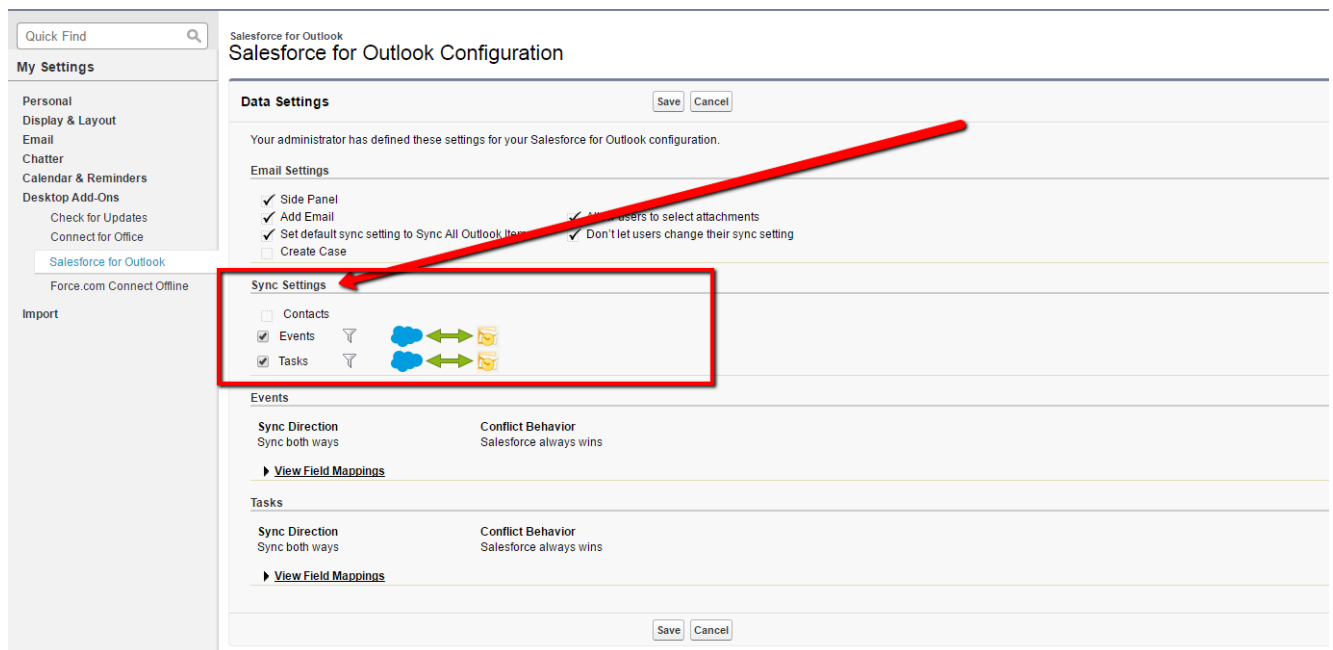
You can, of course, sync manually whenever you'd like. Just right-click the system tray icon (⊙), and then click **Sync | Sync Now**.

View Configuration Set Up/Options

Salesforce for Outlook "View Configuration" allows you, the user, to see how your administrator has set up your Salesforce for Outlook experience.
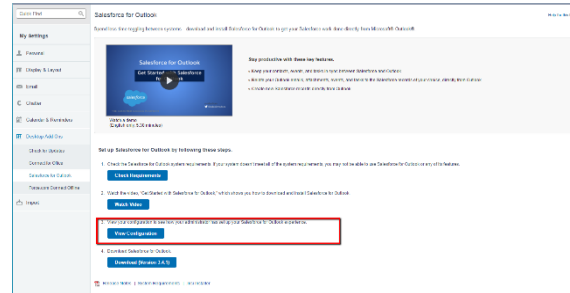
Within the Salesforce for Outlook Configuration, users have the abilities to control the "SYNC SETTINGS" for Outlook –

Each user has the ability to shut off the sync feature that provides a two way feed for the following:

1. Events
2. Tasks

As noted above, each user has the ability to sync manually whenever you'd like. Just right-click the system tray icon (⬤), and then click **Sync | Sync Now**.