**Outlook Connector Steps - Salesforce.com - Presentation Transcript**

1. Connect for Outlook with Salesforce.com
2. First – Send your Security Token
   * Request Security Token
   * Security Token will be sent to your Email Address
3. Connect for Outlook Setup  
   Step 1: Set up Outlook to sync with SF  
   Choose “Setup”  
   Choose “Desktop Integration”  
   Choose “Connect for Microsoft Outlook”  
   Choose “Install now”
4. Install: Connect for Outlook
   * Save to Desktop
5. Connect for Outlook - Wizard
6. Connect for Outlook - Wizard
   * Password + Security Token
7. Connect for Outlook - Wizard
8. Connect for Outlook - Wizard
9. Connect for Outlook - Wizard
10. Connect for Outlook - Wizard
11. Connect for Outlook Setup - General  
    Step 2: When Outlook is set up  
    In Outlook “Tools”   
    Choose “Salesforce Options”  
    We will walk through the proper setup and what it means so you can change if you want
    * Password + Security Token
12. Connect for Outlook Setup - Contacts
13. Contacts - Advanced
14. Outlook Setup - Events
15. Outlook Events - Advanced
16. Outlook Setup - Tasks
17. Tasks - Advanced
18. Outlook Setup - Email
19. Add Email: Adding to Salesforce  
    Step 1: Outlook emails inbox  
    Start with the most current email and make a decision to do something with it  
    If you have already responded, go to your sent emails folder, highlight that email  
    Choose “Add Email” from Salesforce menu icons  
    If not, respond to the email and INSTEAD of hitting “SEND”, hit “SEND and ADD” and follow instructions on next page
20. Add Email: Adding to Salesforce  
    Adding Email to Salesforce:  
    Step 1  
    Email address will appear in the Search window.  
    Step 2  
    Search Results will appear in the Results window. Double-click to select your choice  
    Step 3  
    Your selection will appear in  
    BOLD below  
    Step 4  
    Before adding to Salesforce you have the option to: “Relate To”, “Add Attachments” or modify or add additional comments to the “Message”
21. Add Email: Related To  
    Adding Email – Related To:  
    Step 1  
    Select what you would like to relate the email to (account, opportunity…) click on GO!  
    Step 2  
    Search Results will appear in the Results window. Double-click to select your choice  
    Step 3  
    Your selection will appear in BOLD below
22. Add Email: Attachments  
    Adding Email – Attachments:  
    Step 1  
    Select the Record you would like the attachment to be attached – Contact or Account  
    Step 2  
    Select only the attachments you wish to attach  
    Step 3  
    Add files from your computer
23. Add Email: Edit Message  
    Edit Email Message  
    Step 1  
    Click in the text area and edit as needed.
24. Add to Salesforce  
    What happens next?  
    When you click on Salesforce saves the email with the settings you selected as a “Closed Activity” or “Activity History”.
25. Next Steps  
    The activity will appear as a “Task” in Salesforce. This gives you an opportunity to see it was done correctly, but more importantly…  
    It gives you an opportunity to do something, like create a follow up “Task or Event” using the many shortcut features of Salesforce.
26. Add Email: Exercise  
    Repeat the previous process of “ Add Email” for all emails received or sent in the last 30-days. (Inbox, Sent and Archived)  
    Don’t forget to create your “Next Step” Activity!
27. Add Email: No Contact Found  
    Adding a NEW Contact from Outlook:  
    Steps 1-2-3  
    If the person doesn’t automatically pop up in the SF search window, type in their name & hit “GO”  
    If it still doesn’t appear, you need to create that contact in SF  
    The contact can be added as a “Contact or a Lead”  
    Optional Step 4  
    Click on “Contact or Lead” and create the Contact Record
28. Add Email: Creating a NEW Contact  
    Adding a NEW contact from Outlook:  
    Enter “Contact” information and “Search for the Account” to associate the contact by clicking on the search button.  
    If the Account does not exist you will have to first create the Account in SalesForce.  
    Cancel this window and click on “Related To”
29. Add Email: NEW Account  
    Adding a NEW Account in Outlook  
    If the Account did not exist:  
    Click on Quick Create “Account” to create a New account in SalesForce  
    Once the “Account” is created GO back to “Names” and you will now be able to create your “Contact” associated to the proper Account.
30. Outlook – NEW Calendar or Task  
    Step 1   
    Go to your Outlook Calendar  
    Step 2:   
    Create a new event  
    Step 3:  
    Name your event “Test Salesforce Calendar”  
    Step 4:  
    Click on “Save and Mark for Sync”
31. Calendar – Outlook Sync  
    Step 1: Outlook Calendar – 30-day view of current events scheduled  
    Start today, choose the first item on your calendar and select icon “Mark for Sync”  
    Repeat this process for each item on today&apos;s calendar  
    Step 2: Synchronize with SF  
    Step 3: Go to SF and check if it worked properly  
    Step 4: Open each item in SF and attach it to the appropriate Opportunity and person  
    Step 5: Repeat for all items in your calendar for the next 3 months

Please see the following URL for a demo instruction with pictures:

http://www.slideshare.net/ebarfield/outlook-connect-steps