Outlook Integration Implementation Guide

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OUTLOOK INTEGRATION

The Salesforce integration with Outlook is one of a suite of products that give sales reps the power to work from their email applications, while keeping Salesforce data up to date. The integration provides Salesforce data directly within Outlook, and the ability to log emails and events to Salesforce records. Add Einstein Activity Capture to automate email and event logging and to sync contacts and calendar events between Salesforce and Outlook. To learn more about other products available, see Salesforce Help.

For security considerations for the Outlook integration, see Salesforce Email Integration Security Guide. For security considerations for Einstein Activity Capture, see the Einstein Activity Capture Security Guide.

This guide discusses the Exchange server settings, Salesforce setup, and a short client-side procedure required to set up the integration. The initial setup requires a Salesforce administrator, the IT pro who maintains your Microsoft Exchange server, and the sales reps running the integration in Outlook.

After you're set up, use the Lightning App Builder to create custom email application panes that can include different features for different sales reps. Find the details about what is customizable and how to use the Lightning App Builder in Salesforce Help.

OUTLOOK INTEGRATION SYSTEM REQUIREMENTS

Make sure that your system meets these requirements before you integrate with Microsoft Outlook.

What	Requirements
Email server	Either: • Exchange Online with Office 365 • Exchange Online with GCC High (not supported if you also use Salesforce Inbox) • Exchange 2019, 2016, or 2013 on-premises Hybrid Exchange server environments are supported. For example, when some users connect to Exchange Online and some users connect using an on-premises Exchange server. Each user's client must meet the client requirements. Review Microsoft Exchange Server Setup.
Desktop and web email clients	Any of the following: • Office version 16.0.11629 or later running on Windows 10 version 1903 or later, including Office 365 or Office 2019 (retail only) • Outlook in Office 2021, volume and retail version • Outlook 2019, unless it's a volume-licensed version. Important: Support for Outlook 2013, 2016, and volume-licensed versions of Outlook 2019 ended on December 31, 2022. You can continue to use the Outlook integration after December 2022. However, Salesforce no longer provides support, bug fixes, or new features in the older versions of Outlook. Make plans now to upgrade to the latest versions of Outlook and Windows. • Outlook on the web • New or legacy Outlook for Mac 2016 or 2019. To determine which Outlook for Mac experience you have, see the Microsoft documentation about the new Outlook for Mac. Important: The Outlook integration is built on the Microsoft Office add-in framework. Microsoft develops and maintains that framework and it's a non-SFDC application. To ensure you're running the most secure version, we recommend running the latest version of Outlook and Windows and applying all available security updates from Microsoft. For the best experience, we recommend using an Outlook version that supports pinning the Salesforce pane so that it's always open. The pin is available in the following versions:

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available with Sales Cloud, Service Cloud, and Lightning Platform in: **Group**, **Essentials**, **Starter**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

What	Requirements
	• For Current or Office Insider channels users, the pin is available in Outlook 2016 for Windows build 7668.2000 and later. • For Outlook on the web users, the pin is available if the backend is Office 365. • For new or legacy Outlook for Mac users, the pin is available in version 16.13.180513 and later. • For Deferred channel users, the pin is available in Outlook 2016 for Windows build 7900.xxxx and later.
Browser	For Outlook on the web users, any of these browsers on Windows or Mac operating systems. Make sure that the browser is set to allow cookies from Salesforce. • Google Chrome, most recent stable version • Mozilla Firefox, the most recent stable version. Set Enhanced Tracking Prevention to **Standard** or **Strict**. Add your company's myDomain, the generic `login.salesforce.com`, and any Salesforce domains to the privacy preference exception list. Also add `https://*.outlook.com`, `https://*.office365.com`, `https://*.office.com`, and any Outlook URL used for login. – In newer Mozilla versions, add a site to the privacy preference exception list by following the instructions here: https://support.mozilla.org/en-US/kb/enhanced-tracking-protection-firefox-desktop?as=u&utm_source=inproduct – In older Mozilla versions, click **+** to add a site to the privacy preference exception list. • Microsoft Edge, most recent stable version (Windows only). Set Tracking prevention to **Basic**. If you choose to leave Tracking prevention set to **Balanced** or **Strict**, add Salesforce domains as exceptions along with `https://*.outlook.com`, `https://*.office365.com`, `https://*.office.com`, and any Outlook URL used for login. • Apple Safari, the most recent stable version. Turn off Prevent cross-site tracking. • Mobile browsers aren't supported.
Outlook JavaScript API Requirements Set Version	JavaScript API version 1.4 or later Use version 1.8 or later if you don't want to publicly expose your EWS endpoint. For more information, see Microsoft Exchange Server Setup.
Security encryption protocol on your email server (for Inbox licenses only)	TLS 1.2 or later.

Other Features	Requirements
Server configurations	We support using terminal servers, such as Citrix® servers.
Salesforce Add-in Access	To use the integration, each Outlook user needs the Salesforce add-in for Outlook. Users can get the Salesforce add-in themselves from Microsoft AppSource, or Exchange admins can get the add-in and distribute it using Microsoft Centralized Deployment. If your security policies don't allow access to Microsoft AppSource, there's an option to install the integration using a file-based install.

SET UP THE INTEGRATION WITH OUTLOOK

The integration between Salesforce and Microsoft® Outlook® requires both server-side setup and a short client-side setup procedure. Review the system requirements and ensure that your email server is set up to communicate with the integration. Turn on the integration and push the Salesforce add-in to your Outlook users.

Note: The Outlook integration and the ability to sync contacts and events with Einstein Activity Capture or Lightning Sync are often used together. If you're also setting up Einstein Activity Capture or Lightning Sync, there's setup required for those products and features.

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Considerations for Setting Up the Outlook or Gmail Integration

Before setting up the Outlook or Gmail integration, review limitations and other information about how the integrations work.

Guidelines for Setting Up the Outlook Integration

Before setting up the integration with Microsoft Outlook, review which features you want to enable and whether sales reps need access to different components.

Microsoft Exchange Server Setup for the Outlook Integration

Depending on your Exchange server and Outlook versions, and the features that your reps need, set up Exchange Web Services (EWS) so the server can communicate with Salesforce. To determine if Exchange server setup is required for the Outlook integration in your implementation, review the configuration options and considerations for each approach.

Turn On the Outlook Integration in Salesforce

Turn on the Outlook integration so your sales reps can access Salesforce in Microsoft® Outlook®.

Deploy the Outlook Integration to Users

To use the Outlook integration, each sales rep needs the Salesforce add-in, which provides the integration features. The add-in includes the base integration experience, and Inbox features are unlocked when a user is set up to use Inbox.

Enable Event Type Selections to Log Events from Outlook or Gmail

Use the Type field on the Event object to provide sales reps a selection list to identify the type of event logged from the Outlook or Gmail integration. If the field is visible, reps can choose from a list of event types to classify the event they're logging. Customize the Type field's picklist values to reflect the types of communications in your business.

Considerations for Setting Up the Outlook or Gmail Integration

Before setting up the Outlook or Gmail integration, review limitations and other information about how the integrations work.

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General

- Setting up the Outlook or Gmail integration requires administrative access to Salesforce, and in some scenarios, to your email server. Work with your IT professional for server configuration, and review which role is required for each step in the process.

- The Outlook and Gmail integration include the base integration experience, and Inbox features are unlocked when users are set up to use Inbox.
- When Salesforce is set up with single sign-on (SSO), reps are asked to log in to Salesforce the first time they access the integration. In typical My Domain and SSO configurations, reps can choose the Custom Domain option on the Salesforce login page and enter your My Domain. After sales reps navigate to your domain, they're authenticated in Salesforce and working in the integration.
- The Outlook integration doesn't support custom login flows.

Outlook and Gmail Integration Features

- The Outlook and Gmail integrations use email application panes to define the layout of components in the integration side panel. The default pane gets you up and running quickly. To include, exclude, or reorder components in the email application pane, you can create custom email application panes and assign them to user profiles.
- Users can view and edit records related to an email or an event. Review these considerations for viewing and editing records in the Outlook and Gmail integration.
  - You can't change the order or change the tabs that appear in the record detail.
  - The fields available in the Details tab are shown in the order they're defined in the page layout for that user. Any Lightning components added to the page layout aren't shown in the integration.
  - If the user has access to Chatter, the record detail includes a Chatter tab with the record's Chatter feed.
  - If a task can be related and the user has access to the activity timeline, the record detail also includes an Activity tab.
- To automatically log emails to related Salesforce records, set up Einstein Activity Capture. Users who are configured in Einstein Activity Capture to capture emails see sharing options instead of manual logging options in the integration.

Guidelines for Setting Up the Outlook Integration

Before setting up the integration with Microsoft Outlook, review which features you want to enable and whether sales reps need access to different components.

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Email Client

For better performance, turn on Use Cached Exchange Mode in the Outlook Account Settings on the client. When Use Cached Exchange Mode is on, an error can occur more often because an email is temporarily out of sync with the Exchange Server. To learn more, see the Microsoft documentation.

Salesforce Add-In and Setup

- Each sales rep needs the Salesforce add-in within Microsoft Outlook, which is available from Microsoft AppSource. We recommend that either users get the add-in from Microsoft AppSource or that Exchange admins get the add-in and distribute it using Microsoft Centralized Deployment (MCD). If your security policies don't allow access to Microsoft AppSource, download an install file available on the Outlook Integration and Sync page in Salesforce setup. According to Microsoft, Centralized Deployment can take 24–72 hours.
- As of February 1, 2022, users accessing the Outlook integration in an SSO setup, who are also assigned the Multi-Factor Authentication for User Interface Logins user permission, aren't required to enter multi-factor challenges. This behavior applies to all Salesforce orgs.
- The Outlook integration respects the session timeout duration set in Salesforce. When a session times out, users are prompted that their session expired. If the user mapping created when the user first logged in to the integration still exists, clicking OK in the prompt

refreshes the integration without logging in again. See the existing user mappings in the Outlook Integration and Sync page in Salesforce setup.

- Salesforce includes a managed list of Microsoft Outlook web app domains, such as outlook.com and office365.com. To ensure that your reps who access their Outlook email on the web can use the integration, use the Salesforce-managed list on the integration setup page. Add your trusted domains, such as `webmail.your_company.com` if your users access Outlook on the web using URLs that are specific to your company.

Outlook Integration Features and Optional Setup

- The Outlook integration uses publisher layouts to define the global quick actions such as creating contacts, leads, and opportunities. The integration includes a default set of actions. To give users access or to deny access to certain global quick actions within the integration, add or change the publisher layout.
- By using Enhanced Email, reps can easily associate the emails that they compose to relevant Salesforce records. When Enhanced Email is disabled, emails are associated as tasks. Also enable Email to Salesforce.
- To allow users to log an event to more than one contact, enable Shared Activities.
- For Sales Engagement users who also use Einstein Activity Capture, the integration adds the Email to Salesforce Address as a BCC recipient on emails. That address is automatically generated for a user in their My Email to Salesforce Settings during setup. The BCC address is used to log engagement for Sales Engagement and doesn't log the email as a task.
- There are limitations if an object has multiple record types and the New button in the object's related list is overridden. The integration supports the New button only if you skip the record type selection page in the override configuration.

Outlook Integration in Safari on an iPad

- Buttons on the email application pane, such as Save and Cancel, are at the bottom of the pane.

Microsoft Exchange Server Setup for the Outlook Integration

Depending on your Exchange server and Outlook versions, and the features that your reps need, set up Exchange Web Services (EWS) so the server can communicate with Salesforce. To determine if Exchange server setup is required for the Outlook integration in your implementation, review the configuration options and considerations for each approach.

Important: How you configure your Exchange server depends on your company's internal policies. If you have questions about your Exchange server, contact Microsoft Support. Salesforce can assist if Microsoft requires input, but can't engage with Microsoft on your behalf unless you've contacted them first.

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Set Up Exchange Without Public Exchange Web Services

If your Exchange server and Outlook versions support JavaScript API v1.8 or later, and you don't use Inbox, you can set up the Outlook integration without public web services. A local EWS connection is still required between Outlook and Exchange, and the Exchange Metadata URL must still be publicly exposed.

Note: This configuration is part of the Summer '21 release, available to instances on a rolling basis. Contact your Salesforce account representative for more details about your eligibility.

To determine which API version is available in each Outlook application, see the Microsoft Documentation about the JavaScript API.

If your Exchange server or Outlook versions support JavaScript API versions 1.4 through 1.7, you can still choose to set up the Exchange without public EWS. However, users lose the following features:

- Logging attachments directly from Outlook. Users can add attachments to logged emails in Salesforce.
- Inbox productivity features.

Set Up Exchange with Public Exchange Web Services

Important: Using this setup ensures that Outlook users have access to all the features available in the integration.

Work with your IT professional to ensure that the Exchange server is set up to do the following things.

Reach the Salesforce listing in Microsoft AppSource (All Versions of Outlook and Exchange)

The Exchange server must be able to authorize calls to and from Business Apps - Microsoft AppSource. Choose whether the Exchange administrator sets up the integration add-in on users' behalf or Outlook users get the add-in from the Store themselves. If users get the add-in themselves, they need access to the store. You can also choose to install the add-in using a file available for download from the Outlook Integration and Sync page in Salesforce setup.

Accept incoming Exchange Web Services (EWS) calls from Salesforce

Your internal company policies around Exchange determine what is required in your setup to ensure Exchange can accept incoming EWS calls from Salesforce. Steps can include:

- Enabling an EWS endpoint (a common practice with on-premises servers)
- Using AutoDiscover (optional)
- If there's a firewall, allowing incoming EWS calls to originate from Salesforce IP addresses and domains (allowlists). Valid calls contain json web tokens (JWT)

Review the following for more information.

- *External Link:* Start using web services in Exchange
- *Knowledge Article:* Salesforce IP Addresses & Domains to Allow
- *External Link:* Autodiscover service in Exchange Server
- *External Link:* Inside the Exchange Identity token

Accept incoming authentication calls to the Exchange Metadata URL from Salesforce

The web tokens contain a MetaData URL. If you use Autodiscover to accept EWS call, the MetaData URL could be same as the Autodiscover URL.

Tip: To check the Exchange server connection and confirm that it's configured properly to communicate with the add-in, use the Salesforce Debug Tool. If you see 500 internal error responses, check Outbound Messaging SSL CA Certificates to ensure the certificate is valid.

Note: A service account isn't required for the Outlook integration. If you're using Lightning Sync to sync calendar events and contacts, you could require a service account depending on your configuration.

Turn On the Outlook Integration in Salesforce

Turn on the Outlook integration so your sales reps can access Salesforce in Microsoft® Outlook®.

1. From Setup, in the Quick Find box, enter `Outlook`, and then select **Outlook Integration and Sync**.
2. Enable **Let users access Salesforce records from Outlook**.
3. If reps use Outlook on the web, in the Microsoft Outlook Web App Domain section, add the domains that you want to allow access to Salesforce.

   If you use Office 365, allow Salesforce access from the Office 365 Outlook on the web domain. If you're using custom Outlook for the web domains, add those domains to allow access.

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USER PERMISSIONS

To enable the Outlook Integration
- Customize Application

Deploy the Outlook Integration to Users

To use the Outlook integration, each sales rep needs the Salesforce add-in, which provides the integration features. The add-in includes the base integration experience, and Inbox features are unlocked when a user is set up to use Inbox.

Method	Notes
Microsoft AppSource (Recommended)	We recommend that you or your users get the Salesforce add-in from Microsoft AppSource. Installing the add-in from Microsoft AppSource ensures that your Outlook integration updates with new features after each Salesforce release. It's best to work with your Exchange admin or IT department to deploy the add-in using Microsoft Centralized Deployment from the Exchange server. Distributing the add-in is helpful when users don't have the permissions required to install add-ins themselves or when they can't reach Microsoft AppSource. To determine whether Centralized Deployment is the right solution for you, see Determine if Centralized Deployment of add-ins works for your organization in the Microsoft documentation. See the following Microsoft documents based on your server. • Centralized Deployment for Office add-ins with Office 365 • Centralized Deployment for Office add-ins with Exchange

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Method	Notes
Manifest File	If your company security policies don't allow access to Microsoft AppSource, you can download an XML manifest file to get the add-in. Infrequently, some features can require a change to the manifest file. If you use the manifest file to install the add-in, you must reinstall it to access features that require an update to the file. Check the release notes for each release for alerts about features that require a file update. Get the file from the Outlook Integration and Sync page in Salesforce setup. The file opens as an XML file in your web browser. Use the browser's Save As feature to save the page as a file. Then, either give the file to users so they can add it to their Outlook client, or deploy the add-in using Microsoft Centralized Deployment (MCD). If you give the file to users, they can install the file using the Add from File option in Outlook. According to Microsoft, Centralized Deployment can take 24–72 hours.

To learn more about installing, launching, and managing the Salesforce add-in from Outlook, see the following Microsoft documentation.

- Desktop versions of Outlook
- Outlook on the web

Enable Event Type Selections to Log Events from Outlook or Gmail

Use the Type field on the Event object to provide sales reps a selection list to identify the type of event logged from the Outlook or Gmail integration. If the field is visible, reps can choose from a list of event types to classify the event they're logging. Customize the Type field's picklist values to reflect the types of communications in your business.

1. From the Object Manager in Setup, find the Event object.
2. In Field & Relationships, select **Type**.
3. In Field Information, select **Edit**, set **Field Usage** to Active, and set any other field information required for your configuration.
4. Save the settings.
5. In the Field Information, select **Set Field-Level Security**. Make the field visible to the users and profiles who log events from the integration.
6. Save the settings.
7. In Event Type Picklist Values, add, reorder, or replace the values you want to include as event type selections.
8. Save the picklist values.

As long as the Type field for the Event object is visible, sales reps see the field in the integration when logging events. However, if you choose to make the field required on a page layout, it isn't required when logging events from the integration. The integration doesn't distinguish between user profiles and the page layouts they're assigned for the field.

Tip: The Event object's Type picklist is different than other picklists, which makes it unique when including it in reports. To include the Type field in reports, create a workflow to copy the values from the field to a new custom field on the Event object. You can then add the custom field to your report.

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USER PERMISSIONS

To view field accessibility:
- View Setup and Configuration

To change field accessibility:
- Customize Application

AND

Manage Profiles and Permission Sets

ENHANCED EMAIL AND THE OUTLOOK INTEGRATION

Turn on Enhanced Email in the Outlook integration and Sync setup page so sales reps can relate emails to relevant Salesforce records quicker and more easily.

With Enhanced Email:

- Reps can relate emails to Salesforce records while composing the emails.
- Reps can relate an email to all relevant contacts, leads, and users.
- When reps relate an email to a relevant account, opportunity, case, or custom object, all contacts, leads, and individuals on the email are automatically related.
- Related emails maintain their rich HTML formatting, so emails have the same look and feel in Salesforce as they did in Outlook®.

EDITIONS

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Available with Sales Cloud, Service Cloud, and Lightning Platform in: **Essentials**, **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Considerations for Enhanced Email with the Outlook Integration

Before turning on Enhanced Email with the Outlook integration, review the following considerations:

- Sales reps can relate an email to individuals, including contacts, leads, and Salesforce users who are included on the email recipient list.
- In addition to the email recipients, sales reps can relate an email to one more Salesforce record, such as account, opportunity, case, or custom object.
- For emails related to a case, sales reps can change the relationship to another case after deleting the original Email Message record. This action removes the original relationship.
- For emails related to a lead, sales reps can change the relationship to another lead if that lead is the email's recipient or sender.
- For emails related to an account, opportunity, or a custom object record, sales reps can change the relationship to any other Salesforce records, except cases.

ADD SALESFORCE INBOX FEATURES TO THE OUTLOOK AND GMAIL INTEGRATIONS

Add Salesforce Inbox features to your integration with Microsoft® Outlook® or with Gmail™ to give your reps access to more tools to increase their productivity. You already have the integration enabled. With the addition of an Inbox license, you can easily add Inbox productivity features.

Available in: Lightning Experience
Certain features are available with Sales Cloud and included in **Starter**, **Professional**, **Enterprise**, **Performance,** and **Unlimited** Editions
All features are available with Inbox, Sales Engagement, or Sales Cloud Einstein.

USER PERMISSIONS

To assign permission sets to users:
- Assign Permission Sets

To set up custom email application panes:
- Customize Application

To create and save Lightning pages in the Lightning App Builder:
- Customize Application

To view Lightning pages in the Lightning App Builder
- View Setup and Configuration

1. From Setup, in the Quick Find box, enter `Integration`, and then select either **Outlook Integration and Sync** or **Gmail Integration and Sync**.
2. Expand **Let users access Salesforce records**.
3. If you use Outlook, make sure that **Email to Salesforce** and **Use Enhanced Email** are enabled.
4. In the Inbox in the Integration section, select **Edit Settings** and enable **Make Inbox Available to Users** in the Salesforce Inbox page.

   You can also access this setting by entering `Inbox` in the Quick Find box in Setup and selecting **Setup Assistant**.
5. In the Salesforce Inbox page, select **Assign Permissions Sets**. Assign the Inbox With Einstein Activity Capture or Inbox Without Einstein Activity Capture permission set to reps who can use Inbox features.

   If your reps use Sales Engagement, the Sales Engagement User permission set also includes Inbox features.
6. Return to the Outlook Integration and Sync or Gmail integration and Sync setup page.
7. To change the layout or availability of features in the integration, enable **Customize Content with App Builder**, and select to create an email application pane. Use the Lightning App Builder to customize the pane.

   The email application pane is a Lightning App Builder page that applies to the Salesforce pane in Outlook or Gmail. When you enable Inbox, the default email application pane includes all Inbox productivity features. To include only the features that your reps need, or to change the organization of the features in the pane, create one or more custom panes.

   Tip: To start your custom design, use the **With Inbox Features** option in the Email Application Pane section. Then, remove the features that you don't need from the default email application pane.
8. Activate the email application pane, and assign it to the appropriate user profiles.

   Sales reps with an Inbox permission set see the new pane the next time they open the integration in their email.