



UCSF SALESFORCE FOR OUTLOOK

JANUARY 2013



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2 INTRODUCTION

Salesforce.com for Outlook plugin allows the user to synchronize emails sent to records in the system and add them as activity history of the related records inside Salesforce.com.

This Manual contains all the steps needed to install the Salesforce for Outlook plugin for the Salesforce.com Org.

3 INSTALL AND CONFIGURE SALESFORCE FOR OUTLOOK

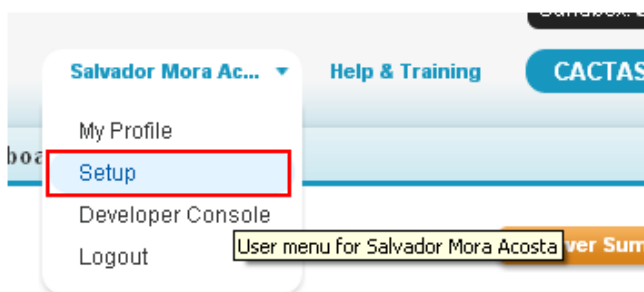
3.1 DOWNLOAD OUTLOOK PLUGIN

3.1.1 LOGIN TO SALESFORCE

Login to Salesforce Org by going to <https://ucsf.my.salesforce.com>

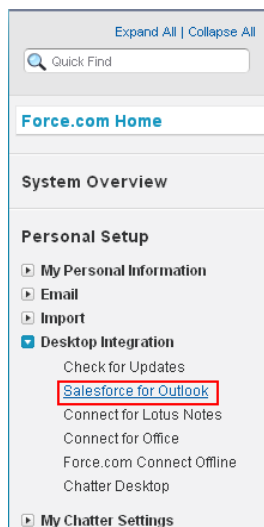
3.1.2 ACCESS THE SETUP

Go to your username located in the upper right corner of the screen and click on Setup.



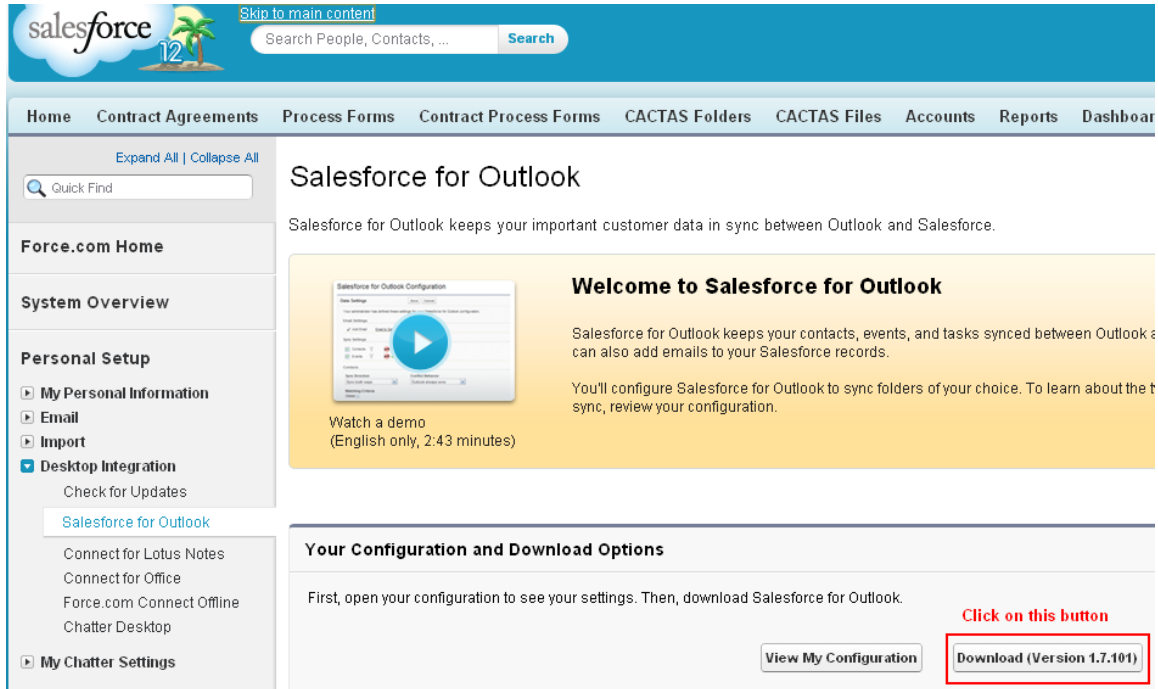
3.1.3 ACCESS SALESFORCE FOR OUTLOOK LINK

In the next screen go to the left section under **Personal Setup**, expand **Desktop Integration** and click on **Salesforce for Outlook** link.



3.1.4 DOWNLOAD PLUGIN

Note that the version of the plugin maybe different from what is shown below as Salesforce continuously updates it.



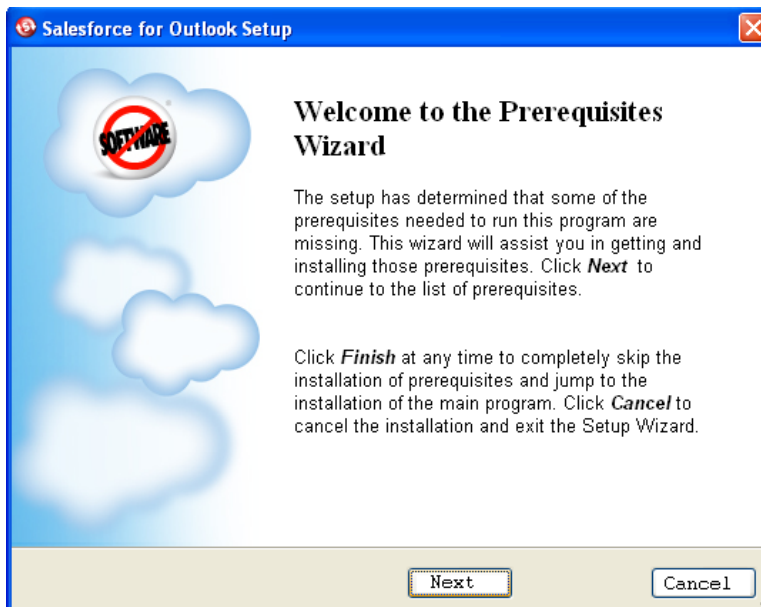
3.2 INSTALL SALESFORCE FOR OUTLOOK PLUGIN

3.2.1 EXECUTE INSTALLATION

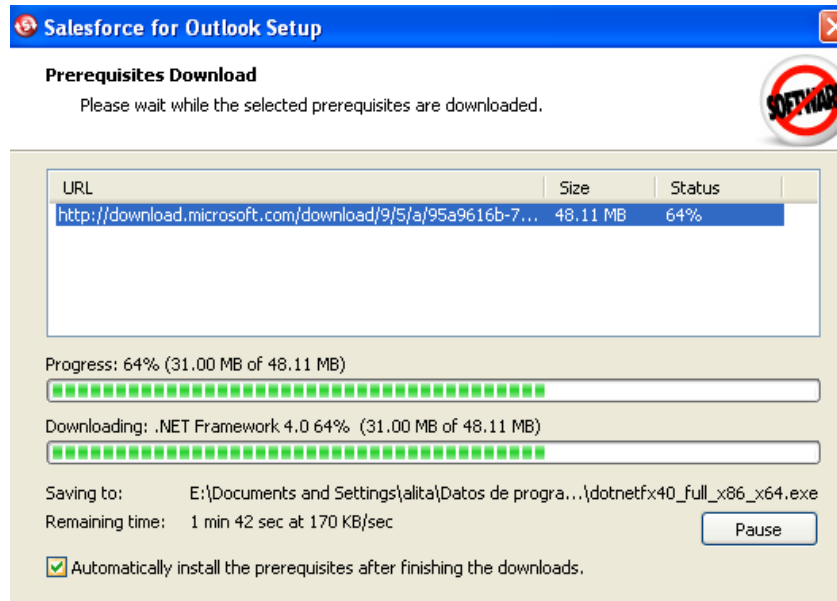
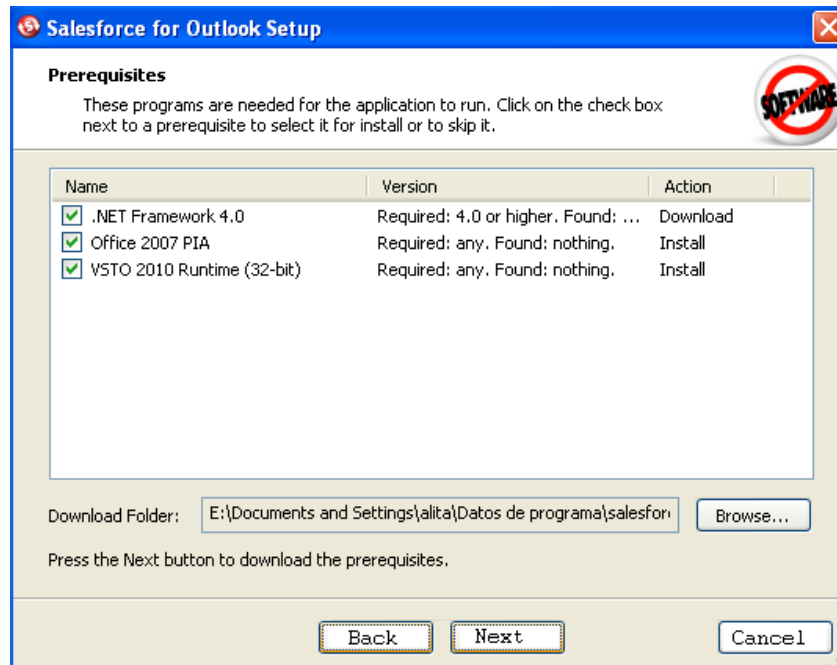
Once the file is downloaded, click on the installer to begin the process.

3.2.2 SALESFORCE FOR OUTLOOK PREREQUISITES WIZARD

The Salesforce for Outlook prerequisites wizard will open. Click on **Next**.



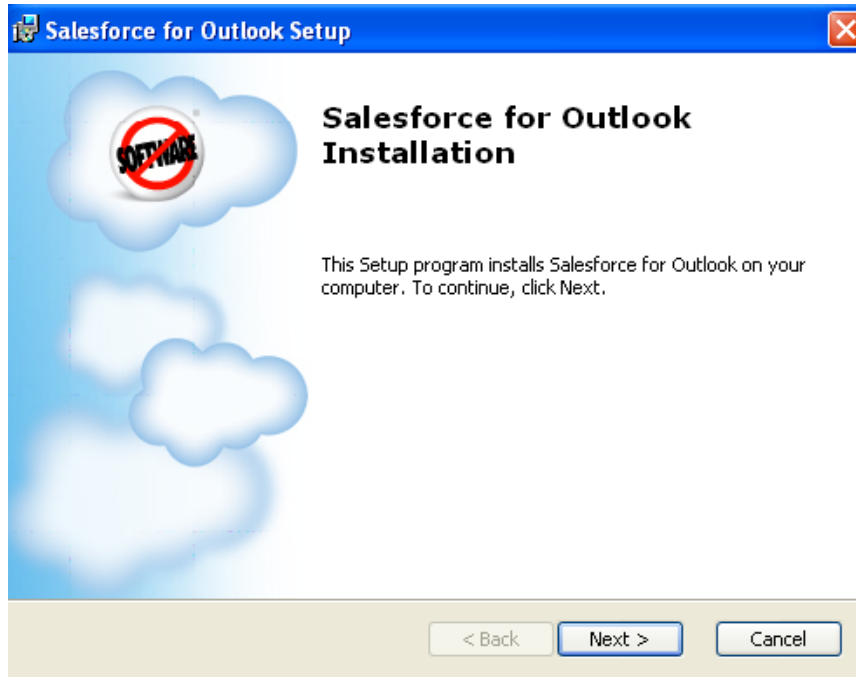
There are some required components that need to be installed first. Click **Next** (see below).



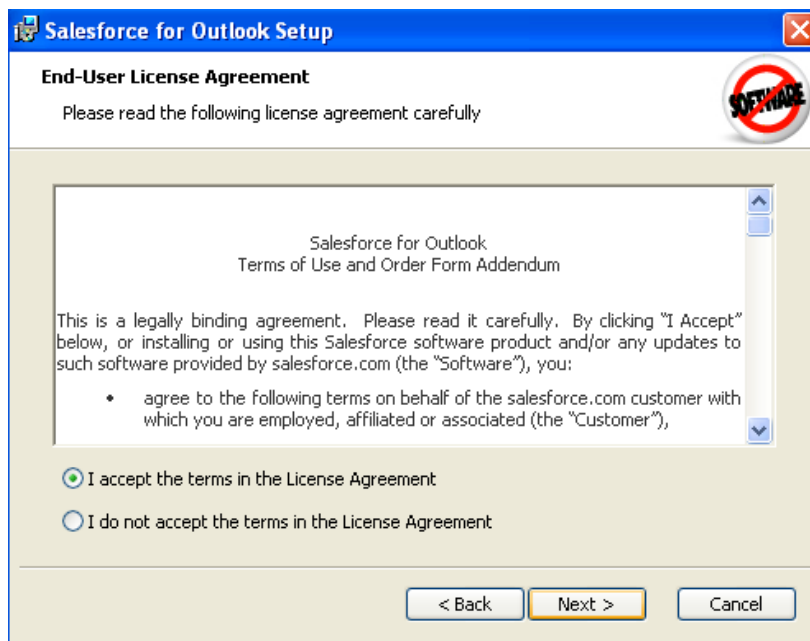
Note: If you are asked to restart the PC, do it. After restarting reopen the installation file and continue.

3.2.3 SALESFORCE FOR OUTLOOK INSTALLATION WIZARD

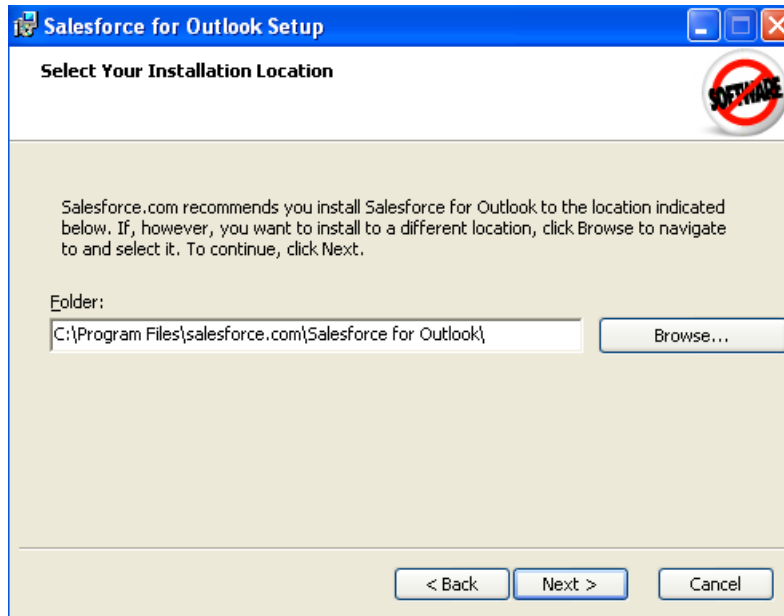
Now that the prerequisites are installed. The Salesforce for Outlook Plugin wizard will be opened. Click **Next**.



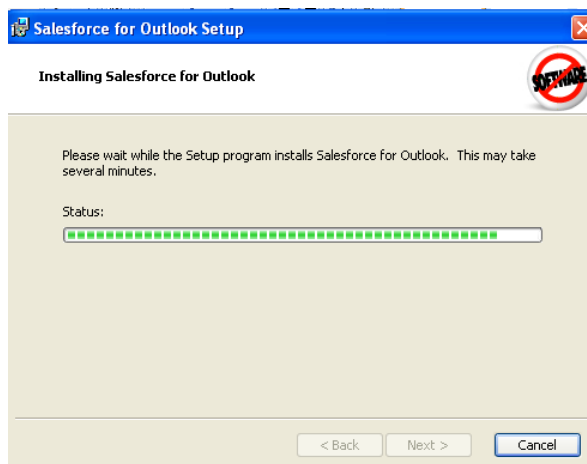
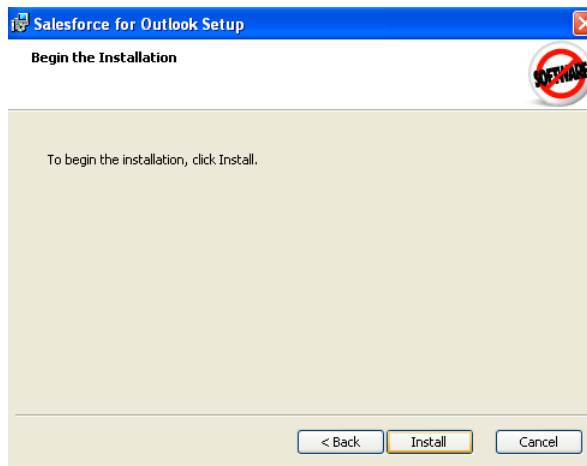
On the next screen, read and accept the agreement. Click **Next**.



If you wish to change the installation path, do it, if not leave the default path and click on Next.



Finally click on **Install** and wait for the installation process to finish



To finish the installation process click on **Finish** on the last screen and leave the **Start Salesforce for Outlook** checkbox active.



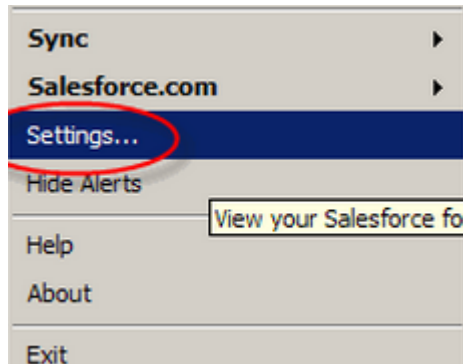
As soon as the installation process is finished you will see a new icon (grayed-out 'S') has appeared in your system tray (lower right corner).



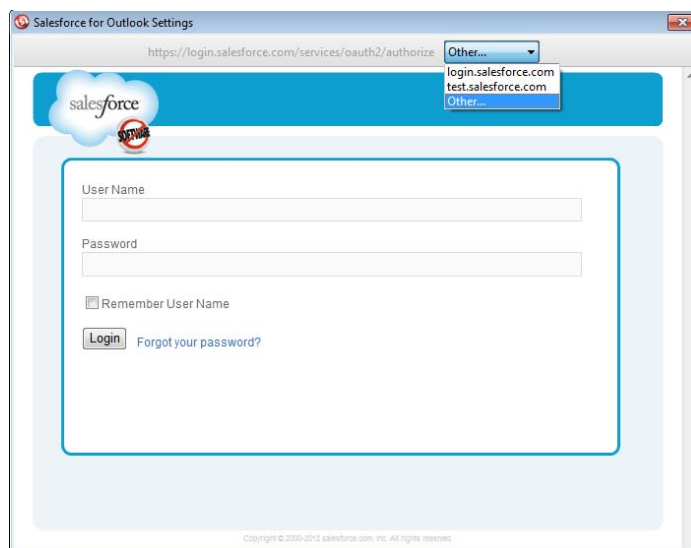
3.3 CONFIGURING SALESFORCE FOR OUTLOOK PLUGIN

3.3.1 CONFIGURE SALESFORCE ACCESS FOR THE PLUGIN

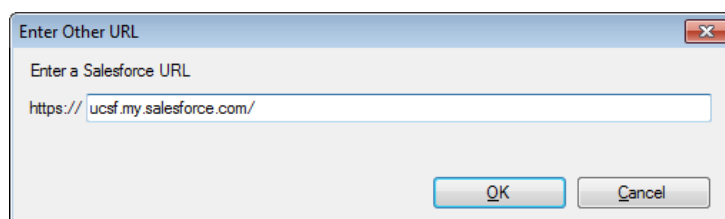
Go to the icon (grayed-out 'S'), right click on it and click on Settings



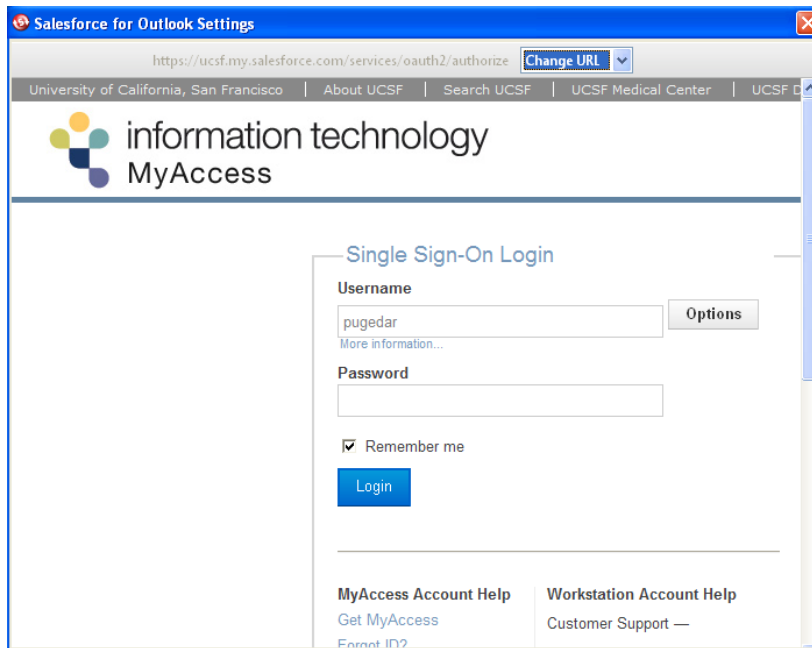
If this is the first time you're installing and configuring the plugin, a new dialog will appear asking for credentials. First click on the pick list menu located at the top and select the **Other** option.



A small pop up will appear asking for the Salesforce URL, enter the following: **ucsf.my.salesforce.com** and click **OK**.



Now the plugin will ask for your MyAccess credentials, provide them and select the **Remember me** checkbox before clicking on the **Login** button.

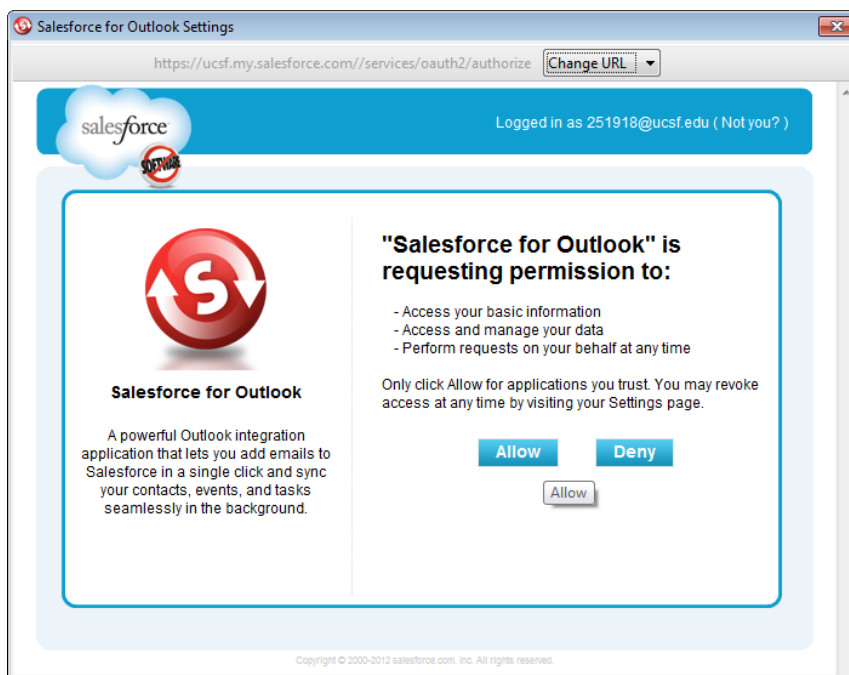


The screenshot shows a web browser window titled "Salesforce for Outlook Settings". The address bar displays "https://ucsf.my.salesforce.com/services/oauth2/authorize". The page header includes "University of California, San Francisco" and "information technology MyAccess". The main content area is titled "Single Sign-On Login" and contains a form with the following fields:

- Username:** A text input field containing "pugedar". To its right is an "Options" button.
- Password:** A password input field.
- Remember me:** A checked checkbox.
- Login:** A blue button.

At the bottom of the form, there are links for "MyAccess Account Help", "Workstation Account Help", "Get MyAccess", and "Customer Support".

Now Salesforce will request for permission to access basic information and manage your data. Click **Allow**.



The screenshot shows a permission request dialog from Salesforce. The dialog is titled "Salesforce for Outlook" and features a red circular icon with a white 'S' and a circular arrow. The text reads:

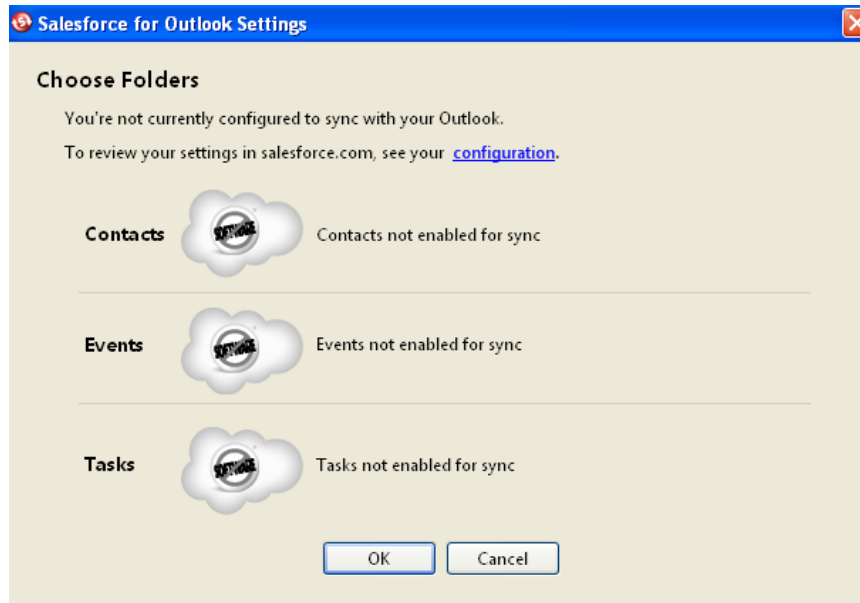
"Salesforce for Outlook" is requesting permission to:

- Access your basic information
- Access and manage your data
- Perform requests on your behalf at any time

Below the list, it states: "Only click Allow for applications you trust. You may revoke access at any time by visiting your Settings page."

At the bottom, there are two buttons: "Allow" and "Deny". A third "Allow" button is visible below the "Deny" button.

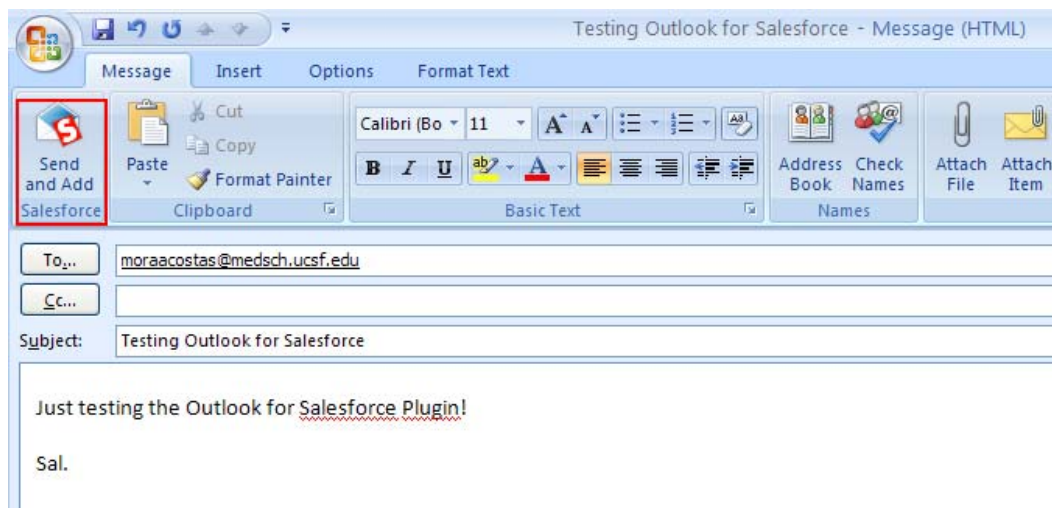
The next screen will show the configuration predefined by the SF Org Administrator. Click **OK**.



Now you will see the grey icon  for the Salesforce for Outlook change to red .



Create a new email with Outlook and now you will have a new button to send the email to Salesforce



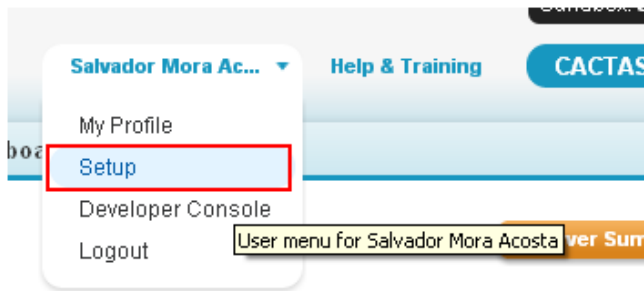
Finally click on **Send and Add**.

3.4 ADDITIONAL CONFIGURATION

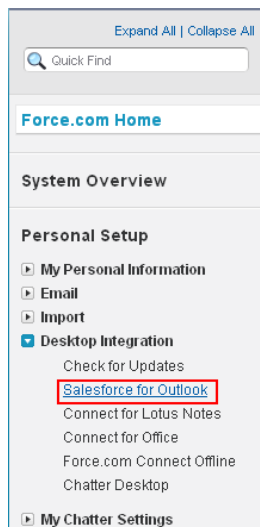
3.4.1 *DISABLING EMAIL CONFIRMATION OF ASSOCIATION*

By default Salesforce for Outlook enables a field used for tracking if the record was created on Salesforce.com, however this can be disabled if needed by following the steps below:

1. Go to your username in the upper right corner of the screen and click on Setup.



2. On the next screen go to the left section under **Personal Setup**, expand **Desktop Integration** and click on **Salesforce for Outlook** link.



3. Click on View my Configuration.

4. Click on Email for Salesforce settings.

5. In the next dialog, uncheck Email me confirmation of association.

6. Click on Save.

3.4.2 SAVE EMAIL ATTACHMENTS

Follow steps 1 – 4 in the previous configuration (3.4.1 Disabling email confirmation of association)

In the next dialog that appears, select 'Always save email attachments'

My Email to Salesforce

Save Cancel

Enter the Email to Salesforce address in the BCC line of emails that you want to add to the activity history of related records. This is an automatically generated address.

Email to Salesforce Address emailtosalesforce@v-1z0qyklt5p5mwx0tswy5iqoeld56wuailqy5e4ecqctnfdz-7simmayz.le.sandbox.salesforce.com

My Acceptable Email Addresses

Enter all email addresses that you use to email leads and contacts, separated by commas. Only emails sent from an email address you specify below can be associated with related records.

My Acceptable Email Addresses

Email Associations

When emails are sent to salesforce.com:

☐ Always send them to [My Unresolved Items](#) New!

☒ Automatically assign them to related salesforce.com records

☐ Opportunities

☒ Leads
 ☒ Contacts

If duplicate records are found, associate email with:

☐ All records

☐ The oldest record

☒ The record with the most activity

☒ If no matching records are found, create a task for each recipient and send it to [My Unresolved Items](#)

☒ Always save email attachments <-- check this
 ☐ Email me confirmation of association

Click on Save.

4 ISSUES AND RESOLUTIONS WITH SALESFORCE FOR OUTLOOK

Before continuing on with the following scenarios and issues, please make sure that you have Salesforce for Outlook properly installed and configured by following the steps outlined within section 3 (Install and Configure Salesforce for Outlook) of this document.

Also note that these issues and resolution cases are documented and are part of Salesforce's knowledge base located at <http://help.salesforce.com>. You can either click on the link below or search for the article by entering the KB # that is enclosed in parenthesis below.

- 4.1 [MISSING SALESFORCE FOR OUTLOOK ADD EMAIL BUTTON \(000003640\)](#)
- 4.2 [SALESFORCE FOR OUTLOOK "ADD EMAIL" BUTTON DOES NOT LOAD IN OUTLOOK 2007 OR 2010 \(000004342\)](#)
- 4.3 [SALESFORCE FOR OUTLOOK DOES NOT RUN AND AN ERROR POPS UP \(000076525\)](#)
- 4.4 [SALESFORCE FOR OUTLOOK INSTALLATION FAILS DURING THE PIA INSTALLATION \(000066916\)](#)
- 4.5 [SALESFORCE FOR OUTLOOK INSTALLATION ISSUES \(000007606\)](#)
- 4.6 [REMOVING / UNINSTALLING SALESFORCE FOR OUTLOOK \(000003843\)](#)
- 4.7 [SALESFORCE FOR OUTLOOK NOT ENABLING](#)