



## For Salesforce Users: Setting Up & Using Salesforce Lightning for Outlook

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Even when you're spending more time in Outlook than in Salesforce, you always want to be considerate of data. To move closer to greater efficiency and better data practices, you can connect Outlook emails to Salesforce, and the Lightning for Outlook add-in is the right tool to get the job done. Without leaving Outlook, you can quickly see if a contact already exists in Salesforce, create a new contact, look up existing Salesforce records, or create other records based on buttons developed by your internal Salesforce Administrator(s).

### ***Are you still in Salesforce Classic? No problem!***

For some time now, it's been possible to relate emails from Outlook to Salesforce through **Salesforce for Outlook** (SFO), a downloadable application that only works for Salesforce Classic. The newer **Lightning for Outlook** (LFO) feature is cloud-based – no need to download any software! – and it works for both the Classic and the Lightning Experience. Even if you're using Salesforce Classic, Lightning for Outlook will work for you and will be a huge benefit, not to mention an improvement from Salesforce for Outlook.

**Note:** instructions detailed below focus exclusively on Lightning for Outlook settings, *not* Lightning Sync.

### **Contents**

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<b>Requirements</b> .....	<b>2</b>
System Requirements (Source: Salesforce Help).....	2
<b>Turn Lightning for Outlook On</b> .....	<b>3</b>
<b>How It Looks</b> .....	<b>5</b>
Outlook Desktop.....	5
Office 365 .....	6
<b>Relate an email from Outlook to Salesforce</b> .....	<b>7</b>
Where does the related email go? .....	7
Create a new record.....	7

## Requirements

### System Requirements (Source: [Salesforce Help](#))

Before activating Lightning for Outlook, it would be wise to first review system requirements or check with your internal Salesforce Administrator(s) and/or your IT support.

<b>Lightning for Outlook is Available in:</b>	Salesforce Classic and Lightning Experience
<b>Available with Sales Cloud, Service Cloud, and <a href="#">Force.com</a> in:</b>	Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions

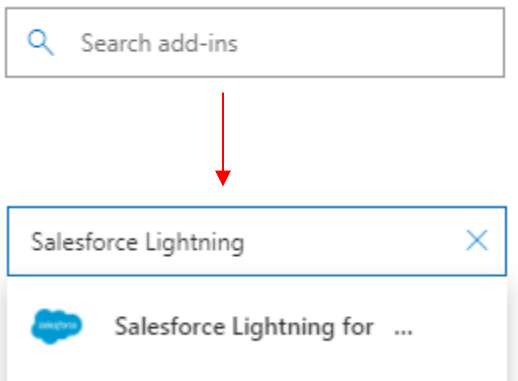
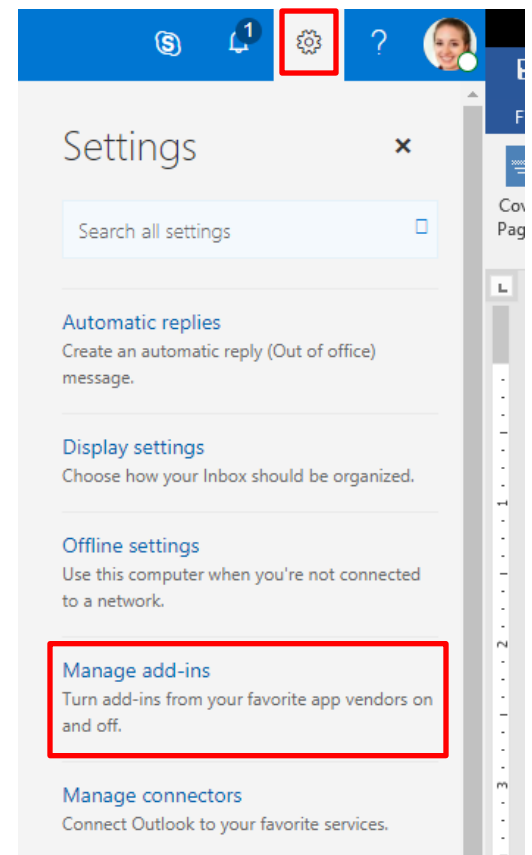
For your	You need
Email server	Either: <ul style="list-style-type: none"> <li>▪ Exchange 2016 or 2013 on-premise</li> <li>▪ Exchange Online with Office 365</li> </ul>
Email application	Either: <ul style="list-style-type: none"> <li>▪ Outlook Web App</li> <li>▪ Microsoft Outlook® 2016 or 2013 on Windows PC</li> <li>▪ Microsoft Outlook for Mac 2016</li> </ul>
Browser	Any of these browsers that allow cookies from Salesforce on Windows or Mac operating systems. <ul style="list-style-type: none"> <li>▪ Google Chrome™, most recent stable version</li> <li>▪ Mozilla® Firefox®, most recent stable version</li> <li>▪ Apple® Safari®, most recent stable version</li> <li>▪ Microsoft Internet Explorer® 11 (Windows only)</li> <li>▪ Microsoft Edge, most recent stable version (Windows only)</li> </ul>
Security encryption protocol on your email server	TLS 1.1 or later.

## Turn Lightning for Outlook On

Once a Salesforce Administrator has turned on Lightning for Outlook access, you can log into [Office 365 Outlook](#) through a web browser and make the add-in available for your use.

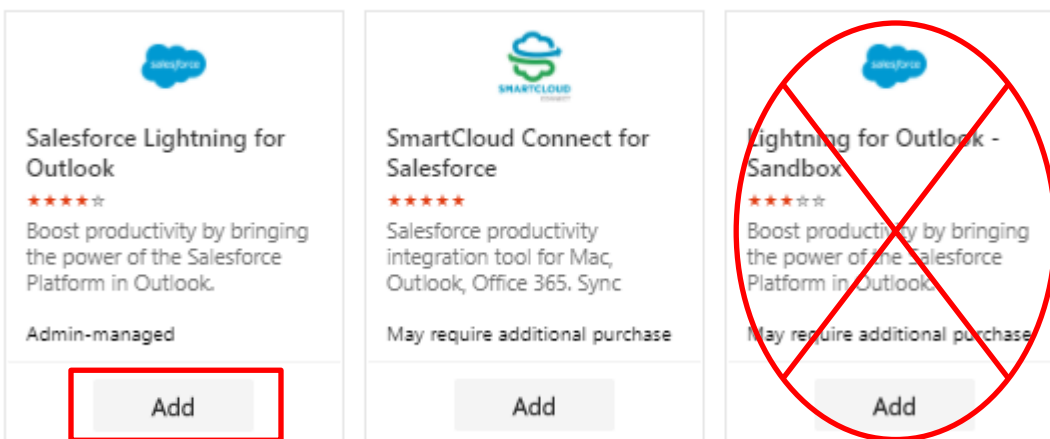
Once logged in, you can click on the gear icon in the top navigation bar. From there, click “Manage add-ins”.

Then in the search bar, you should type “Salesforce Lightning” and click the Enter key on your keyboard to pull up search results. Alternatively, when you type “Salesforce Lightning” Outlook will suggest an add-in immediately; the first result that appears when you type should also be the correct option and you can click it.

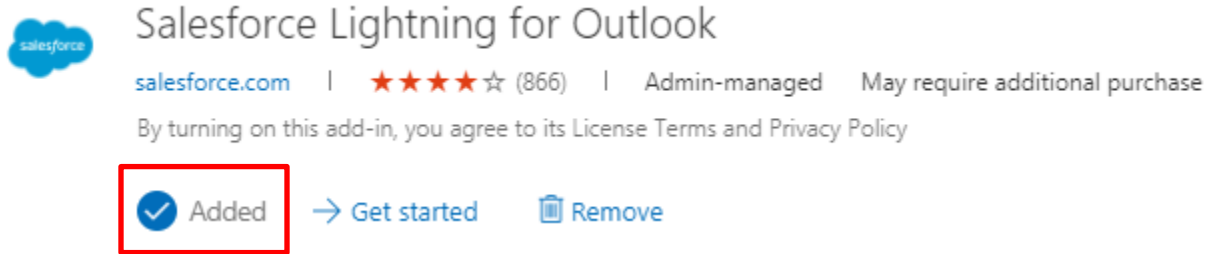


If you click the Enter key, you’ll see all relevant search results. The “Salesforce Lightning for Outlook” add-in is the add-in you want. Simply click the button below, “Add”, to turn it on for your email. Do not select the “Lightning for Outlook – Sandbox” add-in unless you’re deliberately testing in a sandbox.

### Results for 'salesforce lightning'



Alternatively if you open to the add-in directly, you can select “Add” below the add-in title.



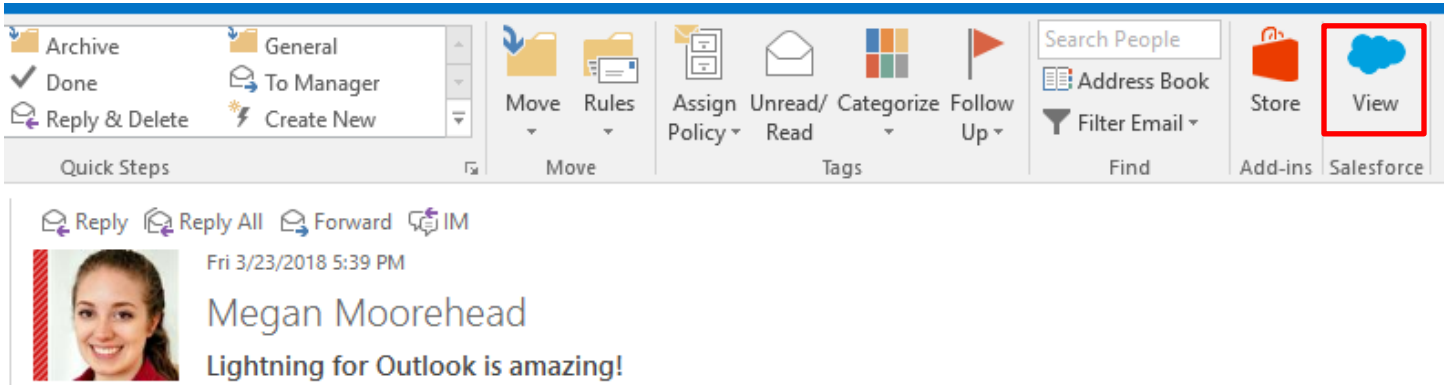
Within minutes, the add-in should appear in both Outlook desktop and Office 365 on the web. (Note, you may need to restart Outlook desktop; close out of the application and open it back up again. Contact your Salesforce Administrator(s) if you experience any issues.)

Once this is set up, your Salesforce Administrator(s) will be able to see that you’ve turned Lightning for Outlook on from within Salesforce settings.

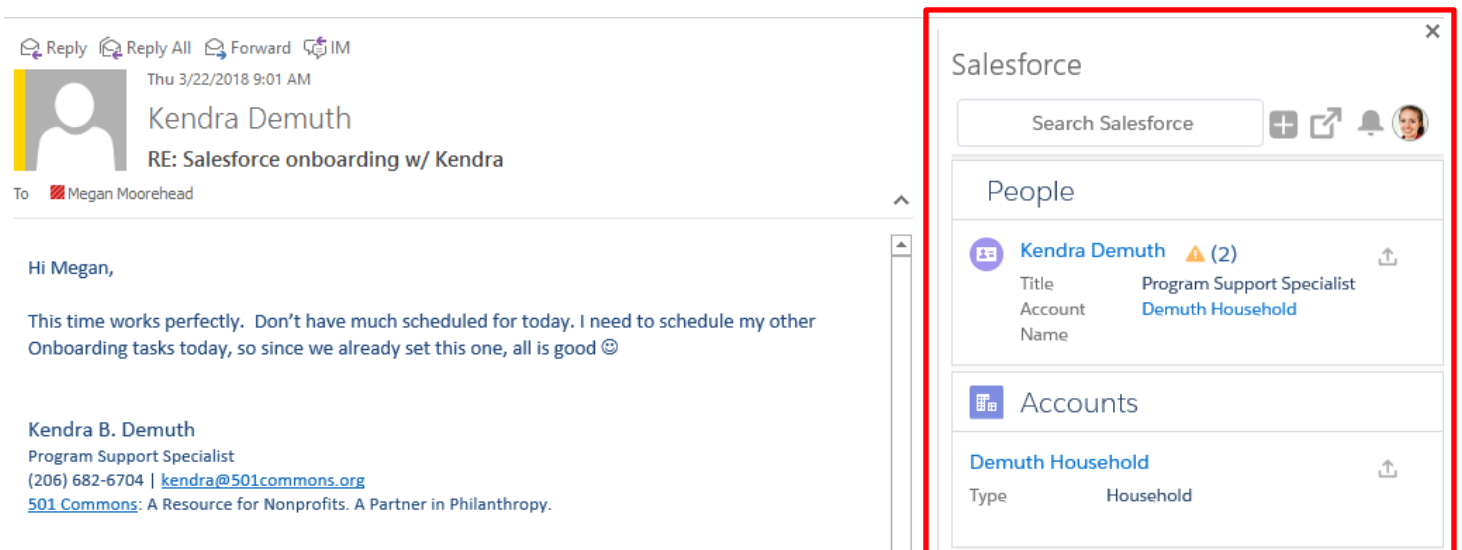
## How It Looks

### Outlook Desktop

The Lightning for Outlook add-in appears as a blue cloud icon in the ribbon.



When you click on the Salesforce cloud icon, the add-in panel will appear on the right-hand side.





### Office 365

Similar to Outlook Desktop, on the web the Lightning for Outlook add-in appears as a small blue cloud below the email heading on the right-hand side.

Similar to Outlook desktop, it may take a minute or two for this icon to load. You may want to close out of your browser and log back into Office 365.



Kendra Demuth

Thu 3/22, 9:01 AM

Megan Moorehead ↕



Reply all | ▾

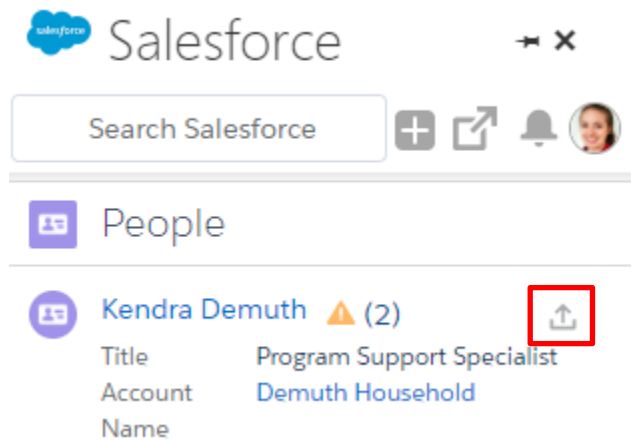
Hi Megan,

This time works perfectly. Don't have much scheduled for today. I need to schedule my other Onboarding tasks today, so since we already set this one, all is good 😊

## Relate an email from Outlook to Salesforce

When you want to add an Outlook email to a Salesforce record, you can click the small grey icon with an upward-facing arrow. Make sure to click the icon next to the record you want the email associated with.

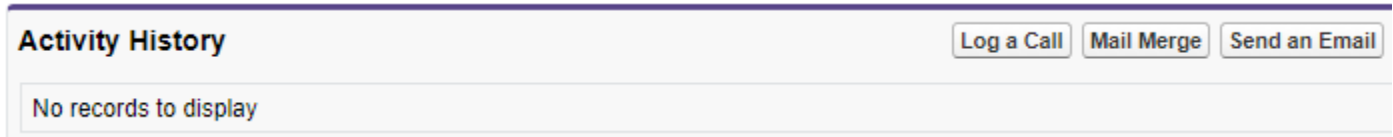
Initially when you open the side panel, Salesforce will suggest related records based on the email addresses in your Outlook message. However you can always search Salesforce in the search bar for another Contact, Account, Opportunity, or other record you want the email associated with.



### Where does the related email go?

When an email is related from Outlook to Salesforce in the Lightning for Outlook add-in, the email is automatically added to the record under **Activity History** (the related list on the respective object).

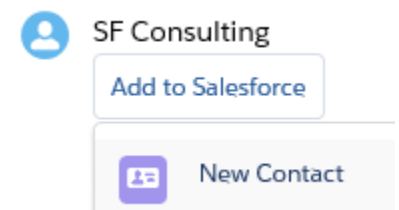
If you use Enhanced Email, the related record will be in the form of an email. Otherwise, the related record will be in Salesforce as a completed task.



### Create a new record

Your internal Salesforce Administrator(s) may also give you the option to create new records in Salesforce by clicking a button and filling in a few fields.

If Lightning for Outlook identifies an email address in your message and the email address is not in Salesforce, it will give you the option to “Add to Salesforce” with a quick click.

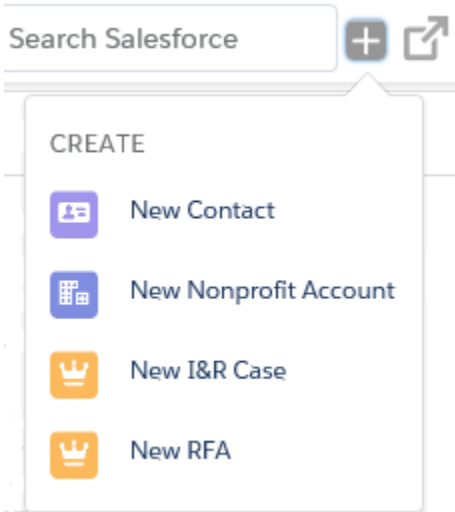


Otherwise, you can create new records by clicking the Plus (+) icon next to the search bar.

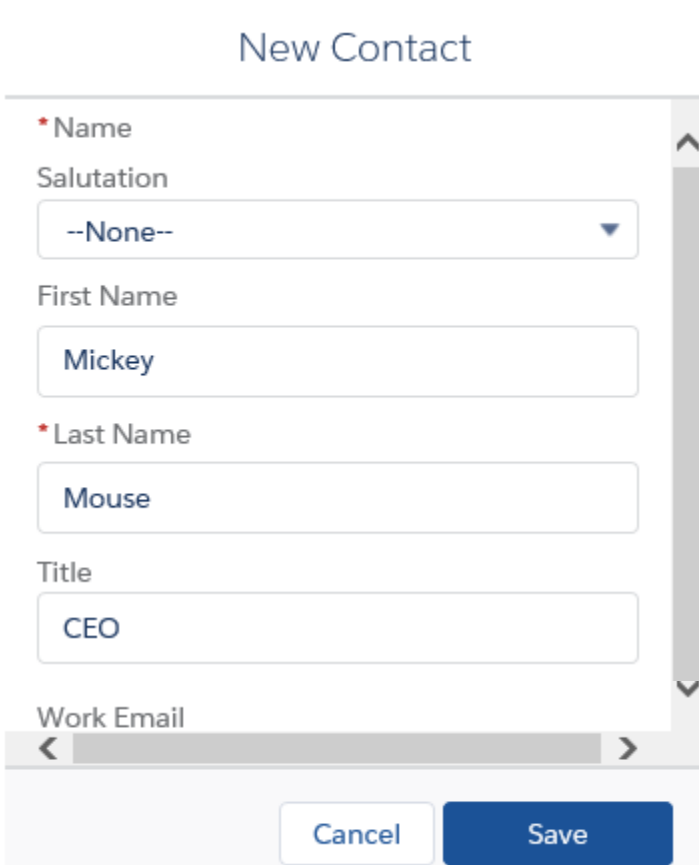
## Salesforce



Your Salesforce Administrator(s) choose(s) which actions are available – in other words, which buttons appear when you click on the plus (+) icon. Below is an example of actions. They can be entirely custom to help you create whatever records you need access to.



Below is an example of available fields when creating a new contact:



The image shows the "New Contact" form in Salesforce. The form includes the following fields: "Name" (required), "Salutation" (dropdown menu with "--None--" selected), "First Name" (text input with "Mickey"), "Last Name" (required, text input with "Mouse"), "Title" (text input with "CEO"), and "Work Email" (text input). At the bottom of the form are "Cancel" and "Save" buttons.