



# Connecting Classic Outlook Email with Salesforce

05/09/2025

# What will be covered in this training?

A stylized diagram of a pair of glasses. Two white circles represent the lenses, connected by a vertical line. Two diagonal lines extend from the top and bottom of the circles, representing the temples of the glasses.

**Part 1: Downloading Salesforce Plug-in and Connecting to Outlook**

**Part 2: Logging Email Activity from Outlook**

## This training will help you complete the following actions:

- Installing the Salesforce Outlook Plug-in
- Connecting the Outlook Plug-in to your Salesforce Account
- Logging Outlook outgoing email sends in Salesforce
- Creating Email Activity in Salesforce for incoming Outlook email messages

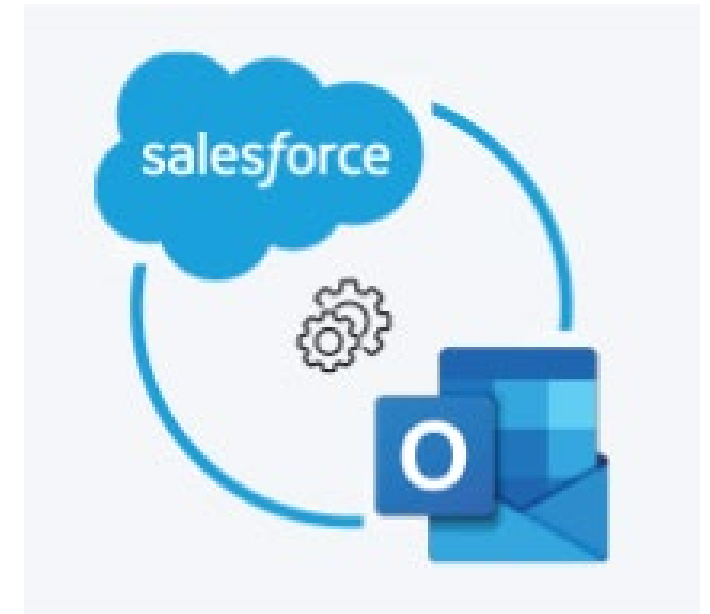


# Part 1: Salesforce Outlook Plug-in (Classic)

# Salesforce and Outlook Integration



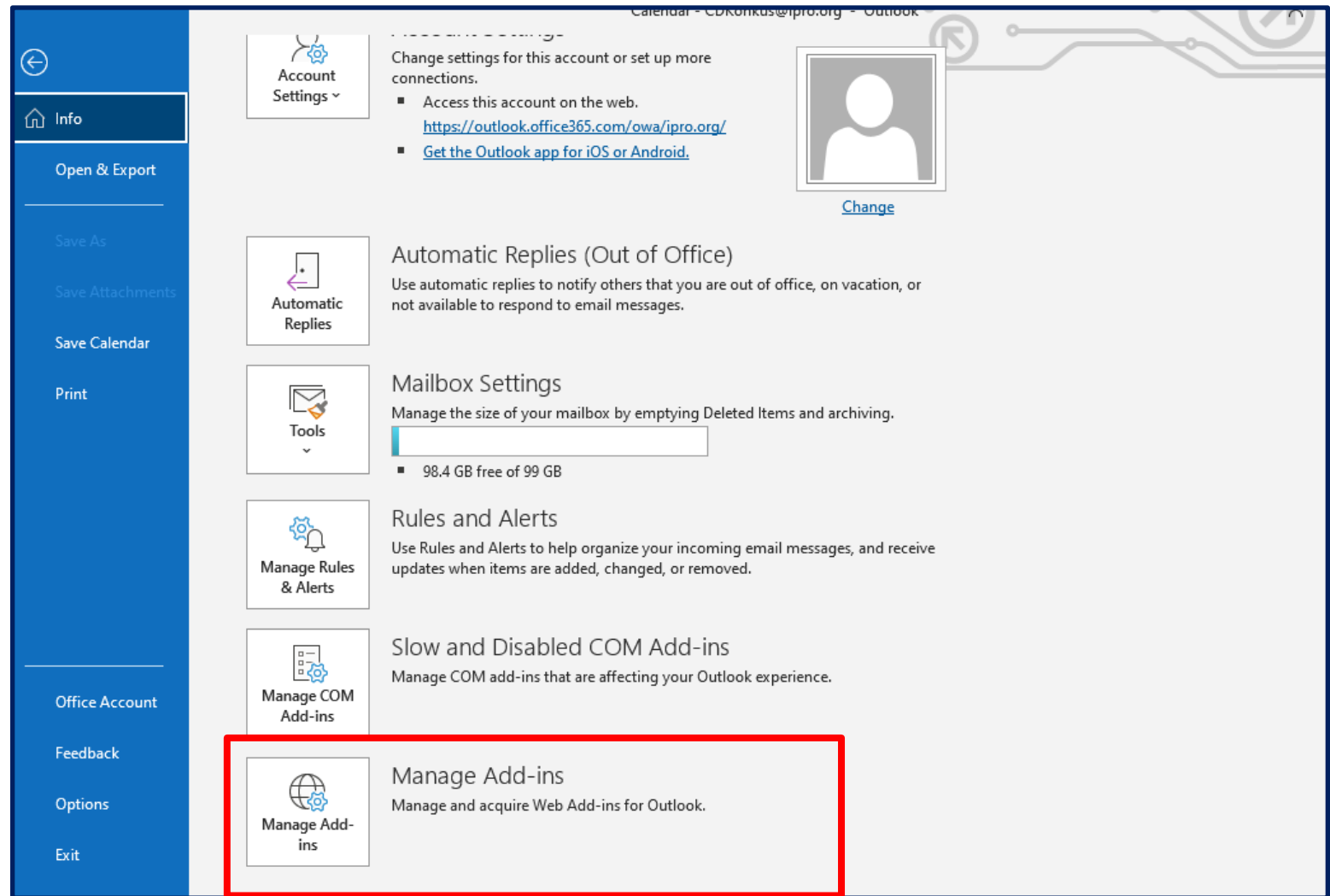
- IPRO has connected Outlook and Salesforce to provide two ways to send email to providers, facilities, hospitals or other IPRO clients
- Sending email from Salesforce allows you to leave an instant copy of the email on the record of the Contact, Case, or Account for future reference by IPRO staff and affiliates authorized to view the record
- When sending or receiving email via Outlook, you will now be able to send a copy of that email over to Salesforce to be stored on the Contact, Case or Account record
- **NOTE:** The Salesforce/Outlook connection does not impact Secure Email. Please continue to follow existing policy on sending/receiving Secure Email messages



# Initial Set Up



- Before sending an email to Salesforce from Outlook, you first need to download the Salesforce App from Microsoft App Exchange
- From Outlook go to File then scroll to the bottom and click on Manage Add-Ins
- This will open the App store in your browser window



# Sending Email from Outlook to Salesforce



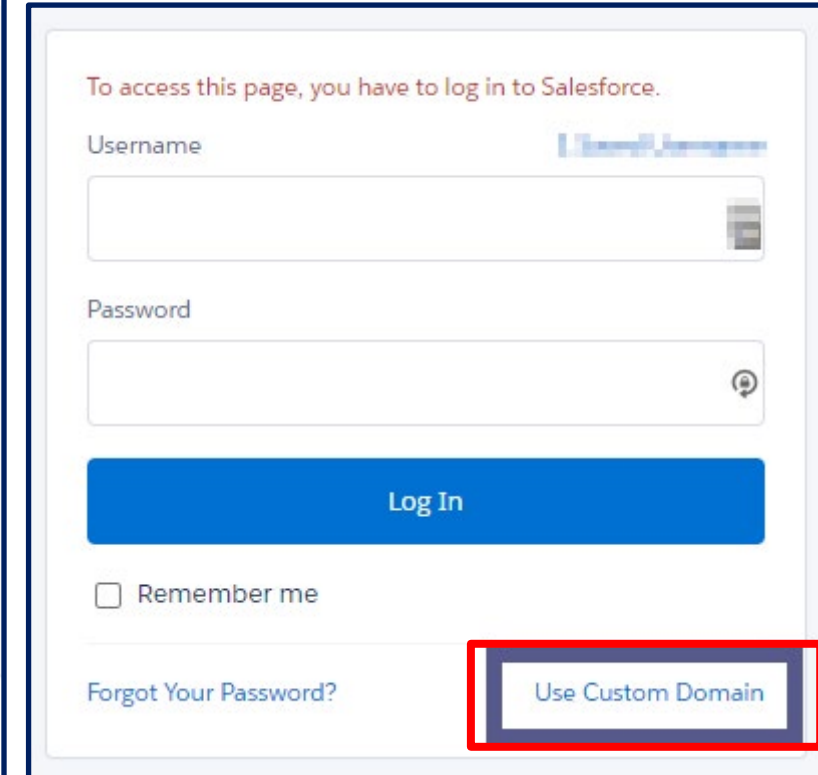
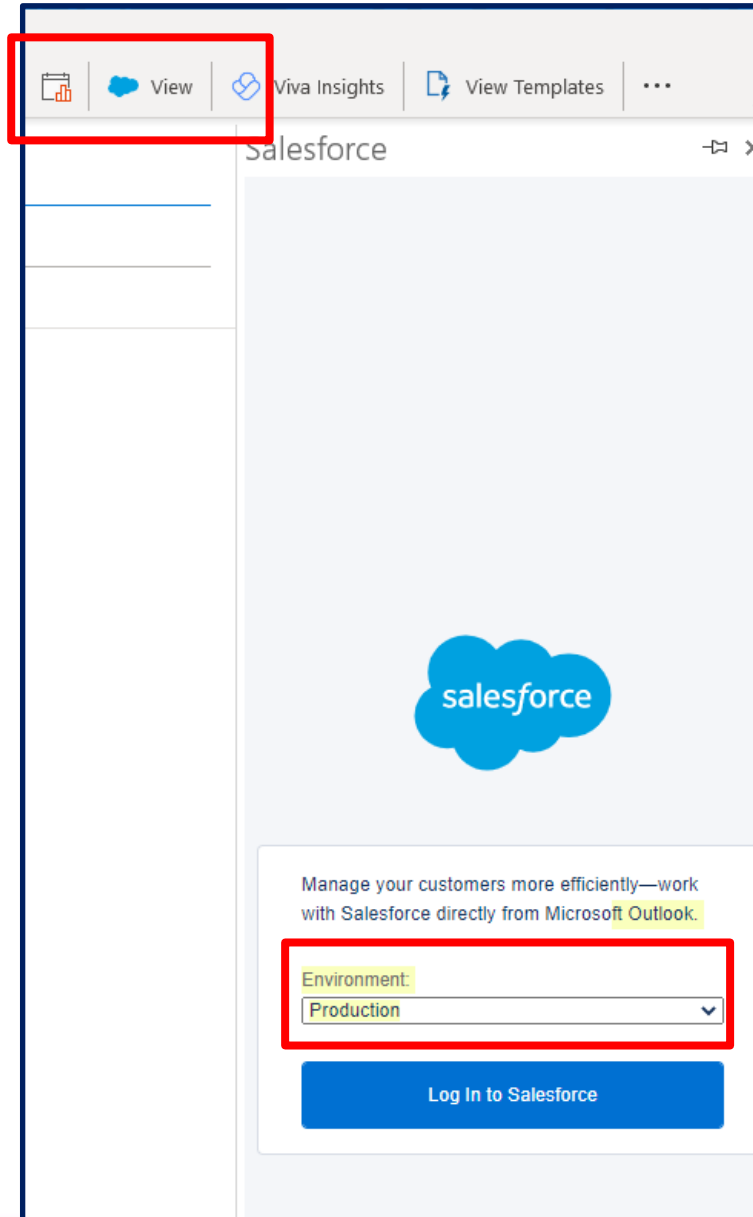
- Enter Salesforce in the Search box and click Add. Then Continue at the next prompt.
- Once the installation is complete, close the window and go back into Outlook.

A screenshot of the 'Add-Ins for Outlook' interface. The window title is 'Add-Ins for Outlook' with a 'Send feedback' link and a close button. Below the title is a warning: 'Add-ins may access personal information. By turning an add-in on, you agree to its License Terms and Privacy Policy.' A search bar on the right contains the text 'Salesforce'. On the left, there are filters for 'All', 'My add-ins', and 'Admin-managed'. The main area shows 'Results for 'Salesforce'' with a grid of add-in cards. The first card, 'Salesforce', is highlighted with a dashed border and has an 'Add' button. Other cards include 'Revenue Grid for Salesforce CRM', 'Salesforce Connector', 'Cirrus Insight — Email Sidebar &amp; Sync to', 'Veloxy for Outlook and Salesforce CRM', and 'Microsoft 365 Email &amp; Calendar Integration for'. Each card displays a logo, name, star rating, description, and a note that 'Additional purchase may be required'.

# Connecting Outlook to Salesforce



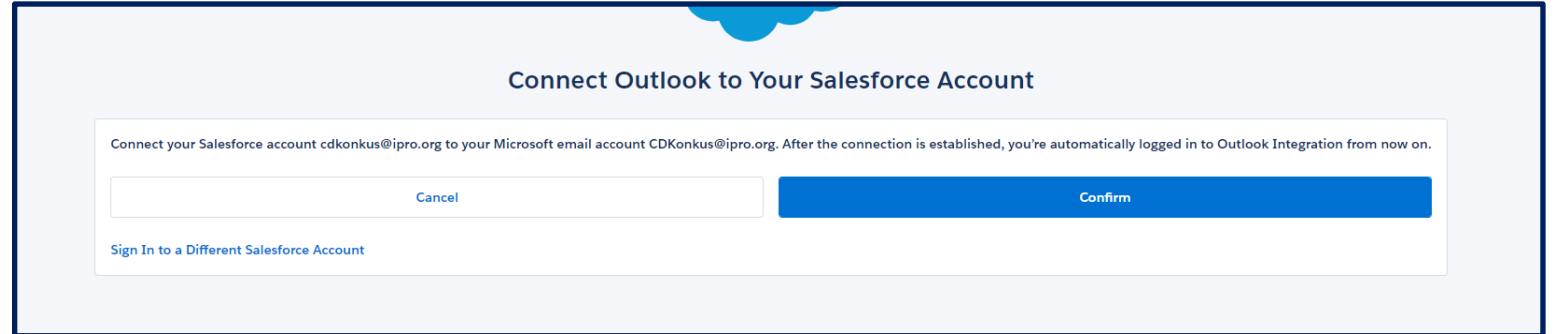
- Create a New Email from Outlook
- From the new email, you should see at the top of your screen the Salesforce cloud
- Click on the Cloud and a side bar will appear asking if you want Production or Sandbox. Choose Production and click “Log in to Salesforce”
- A new window will appear. Select Use Custom Domain
- Enter ipro3.my.salesforce.com in the domain box



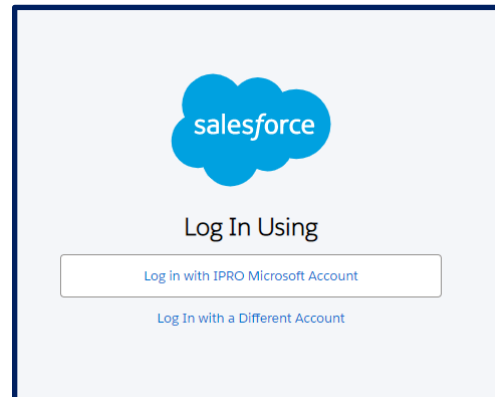
# Connecting Outlook to Salesforce



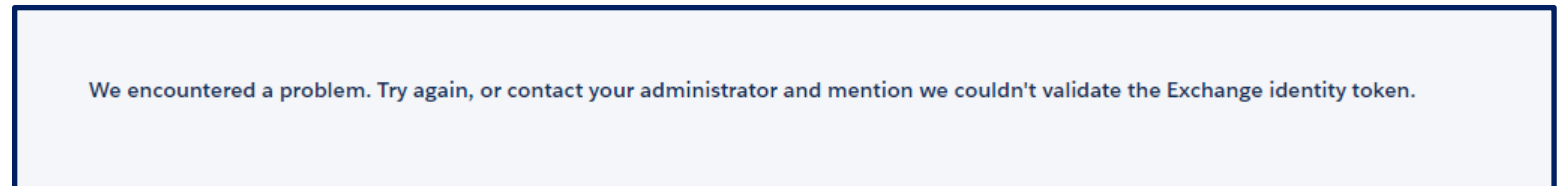
Confirm that you want to connect your Outlook to Salesforce Account



You will then be brought to the same SSO page you see when you log into Salesforce. Select either Log in with Microsoft or Log in with Google



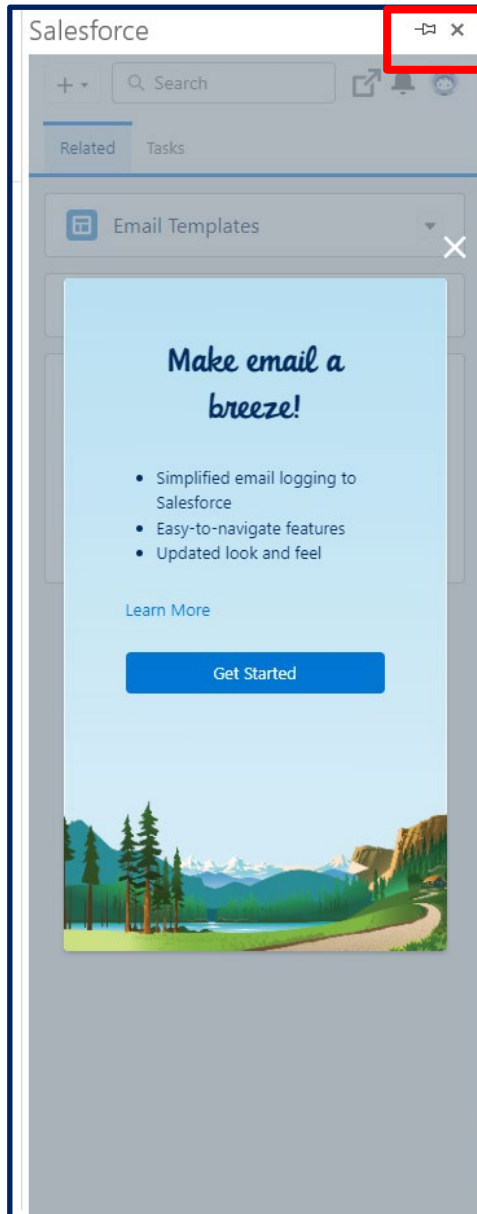
If you get this error, log out of Microsoft and try again



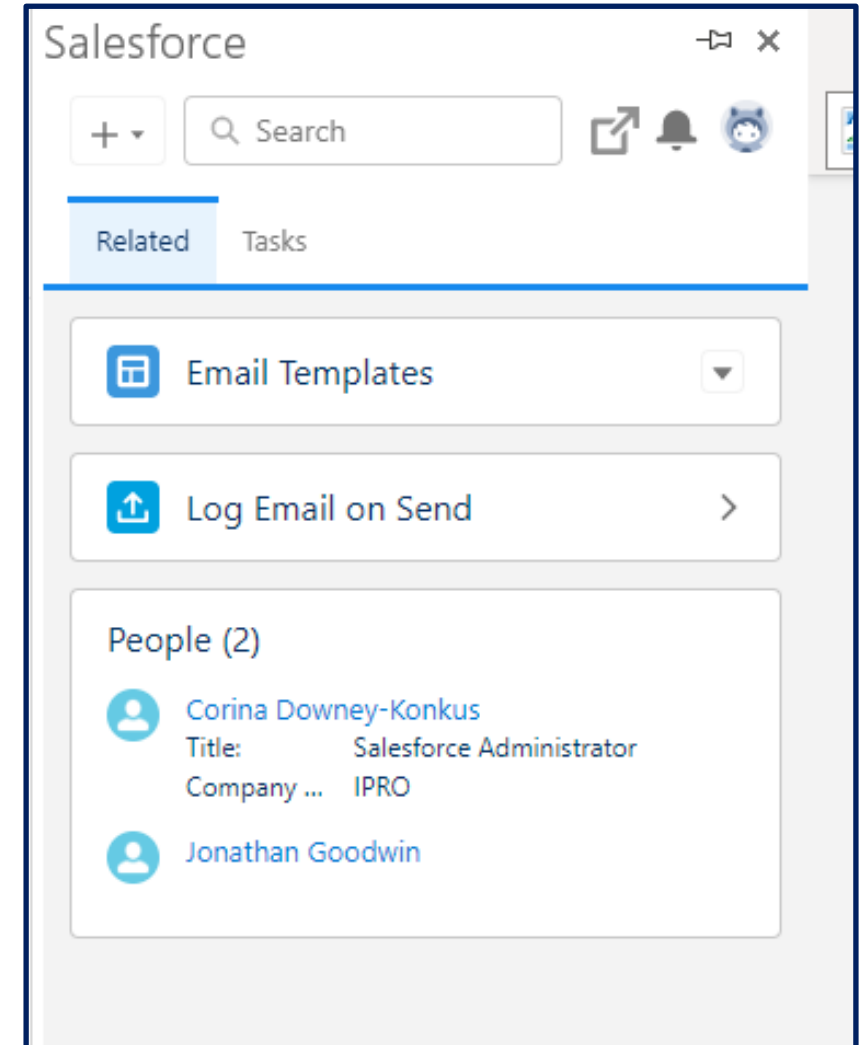
# Part 2:

## Logging Outlook Emails to Salesforce (Classic)

# Sending Email from Outlook to Salesforce



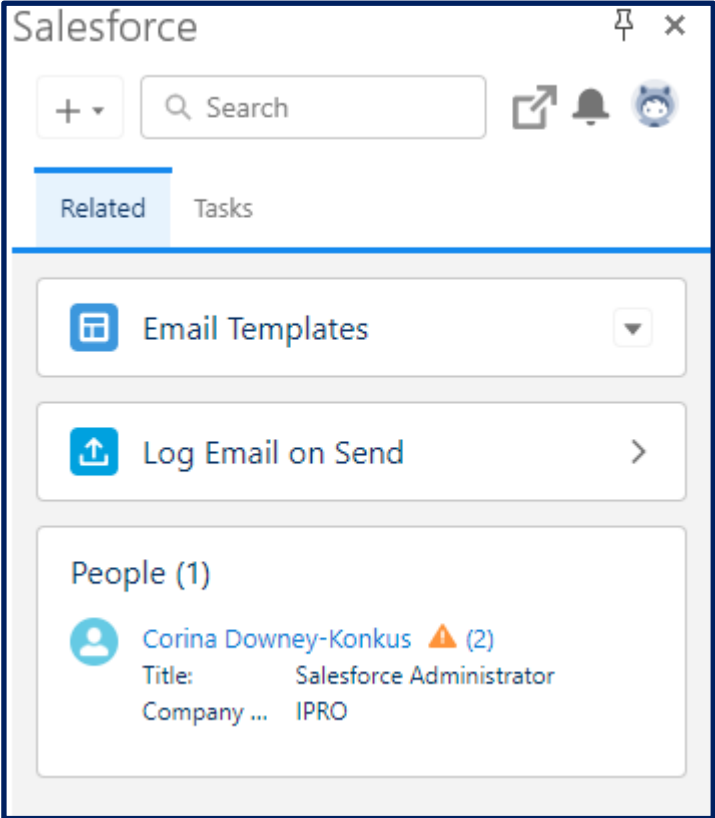
- You will now see the following pane inside email message from your Outlook
- There is a tiny pushpin icon at the top of the pane, click it to keep the pane available whenever you send or receive messages
- Whenever you compose your email, Salesforce will automatically look to see if the contact email address exists in Salesforce. If it does, the side pane will show you the connection



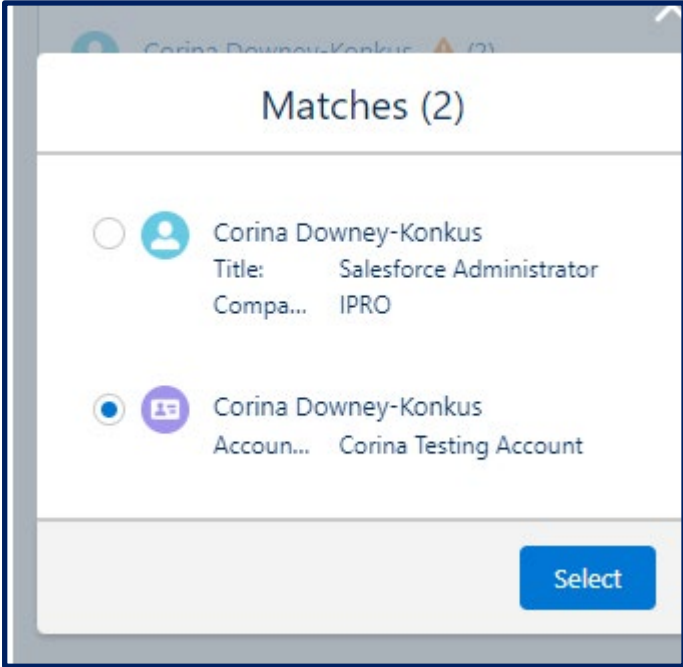
# Sending Email from Outlook to Salesforce



If you click Log Email on Send you will be presented with options on where within Salesforce to log a copy of the email.



This example shows there are 2 records available to match. Verify that only the person or record you wish to connect the email to is selected. Then compose your email and send normally



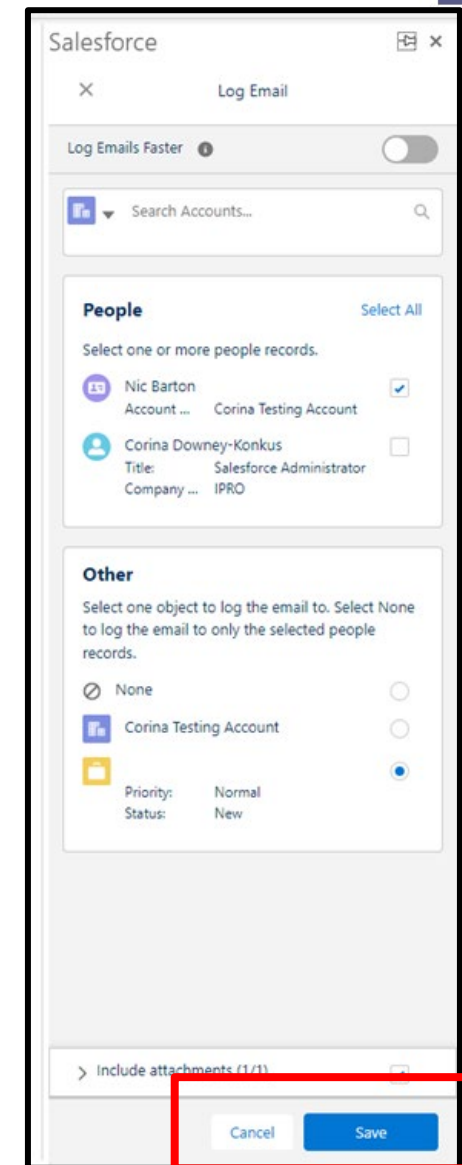
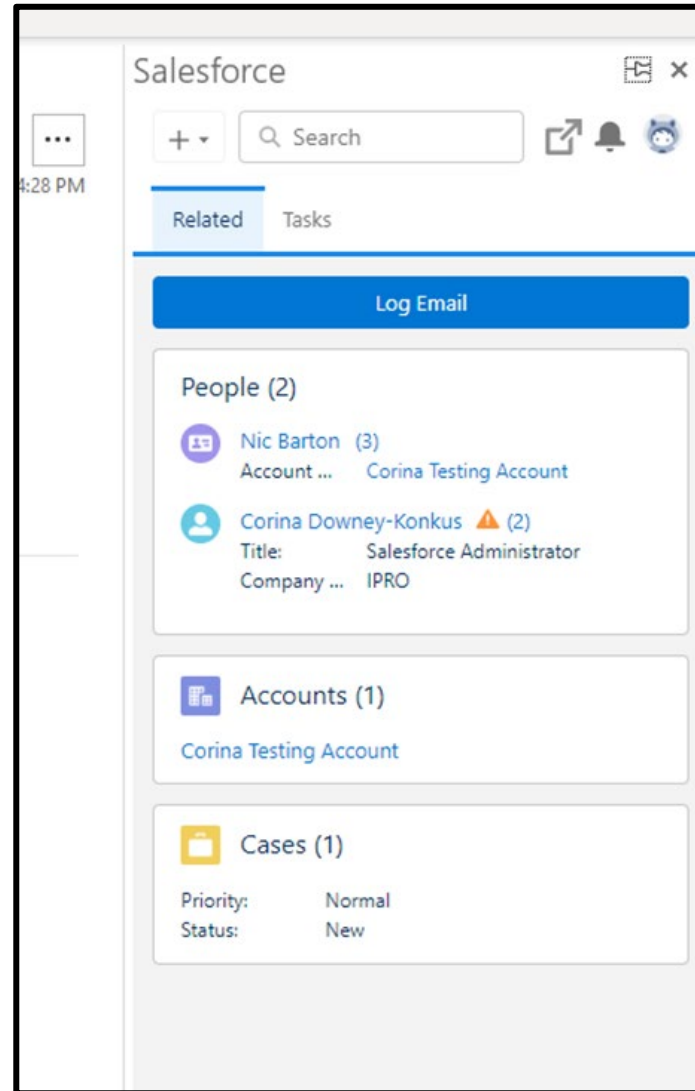
# Sending Email from Outlook to Salesforce



When an email comes into your Outlook inbox, you can send a copy of it over to Salesforce by using the same side pane.

If you do not see the side pane, from within the email click on Message in the top left bar. It will display the Salesforce Cloud icon in the Tool Bar.

You may need to expand the email to full size to view

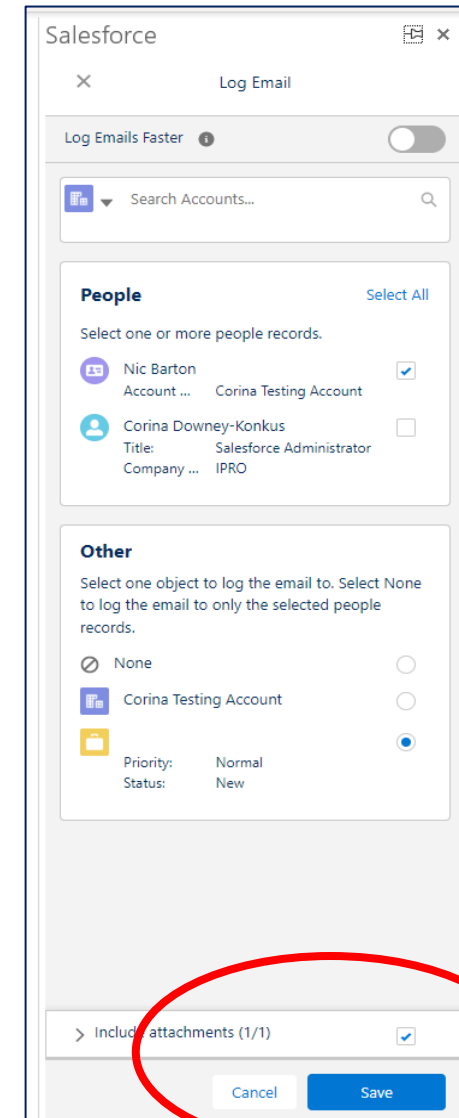
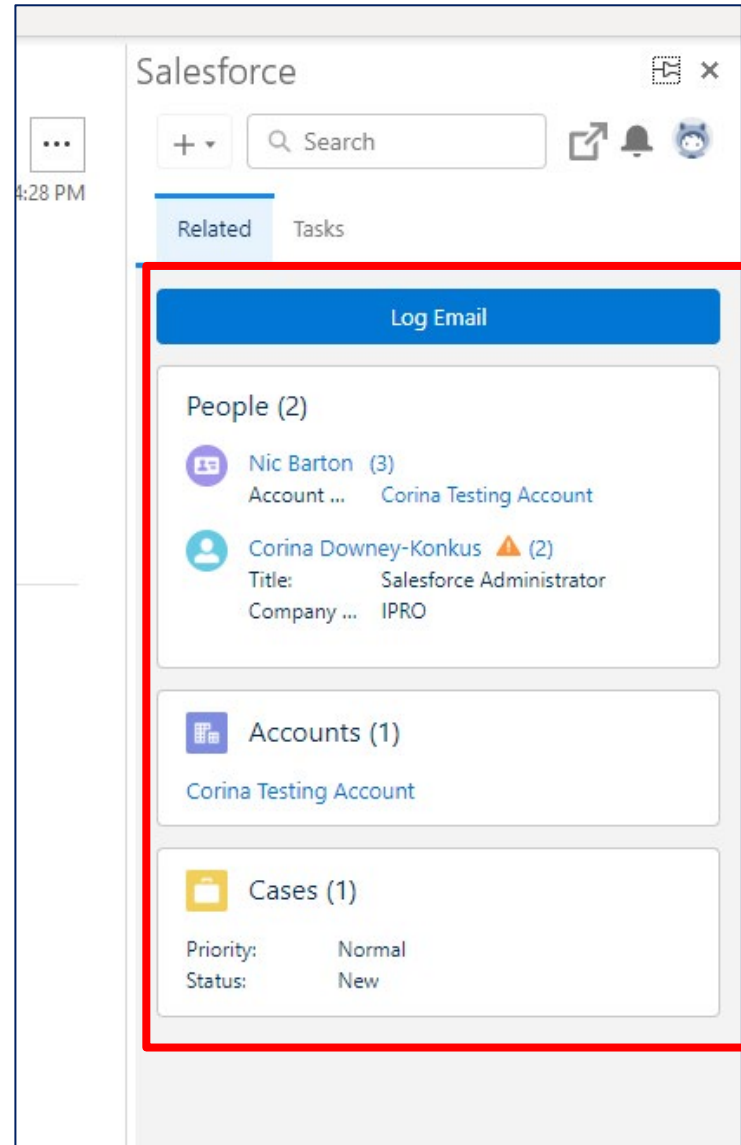


# Sending Email from Outlook to Salesforce



Verify that only the person or record you wish to connect the email to is selected. Notice that in this message, there is the ability to connect it to the Contact, Account or Case. Select only those records where a copy of the email should be saved. Log Email

**REMEMBER:** Saved email messages on the Account or Contact can be viewed by anyone with access the record where it is attached. Documents attached to an email will also be sent over to Salesforce



# Verifying Email Logged In Salesforce



To verify an email was logged in Salesforce, go to the Account, Contact or Case record in Salesforce and look at the Activities bar. You should see an envelope and the title to the email that was sent.

If an email is logged incorrectly and needs to be removed from the system, you will need to put in a [Help Desk ticket](#) with the Salesforce Team

A screenshot of the Salesforce interface showing account details and activity logs. The left pane displays 'Account Details' for 'Corina Testing Account LLC' and 'Case Information' for Case Number 00152748. The right pane shows the 'Activity' tab for this case, with a red circle highlighting an activity entry: 'testing Email Sending - Outlook Plugin' sent at 2:19 PM on Today. Below it, another activity is visible: 'ESRD HTN program' sent at 12:14 PM on Aug 6, 2024.

Account Details

Account Name: [Corina Testing Account LLC](#)

Type of Facility (I): Facility

Account State: MI

Account ZIP Code: 48348

Account CCN ID: 12345

Account TIN:

Account NPI: 123456789

Case Information

Case Number: 00152748

Parent Case:

Enrollment Date: 8/7/2024

Closed Date: 8/8/2024

Close Reason:

Close Reason Details:

Engagement Strategy BCX Date:

Case Owner: Shannon Wolanin

Primary (IA):

Secondary OIA:

Contact Name: [Nic Barton](#)

Contact Phone: 1629

Contact Email: [nbarton@ipro.org](mailto:nbarton@ipro.org)

Engagement Strategy CMS Submit Date:

Created Date: 8/5/2024, 1:27 PM

View All

Activity Chatter

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling a task, and more.

May - 2025 This Month

testing Email Sending - Outlook Plugin 2:19 PM | Today

You sent an email to [nbarton@ipro.org](mailto:nbarton@ipro.org)

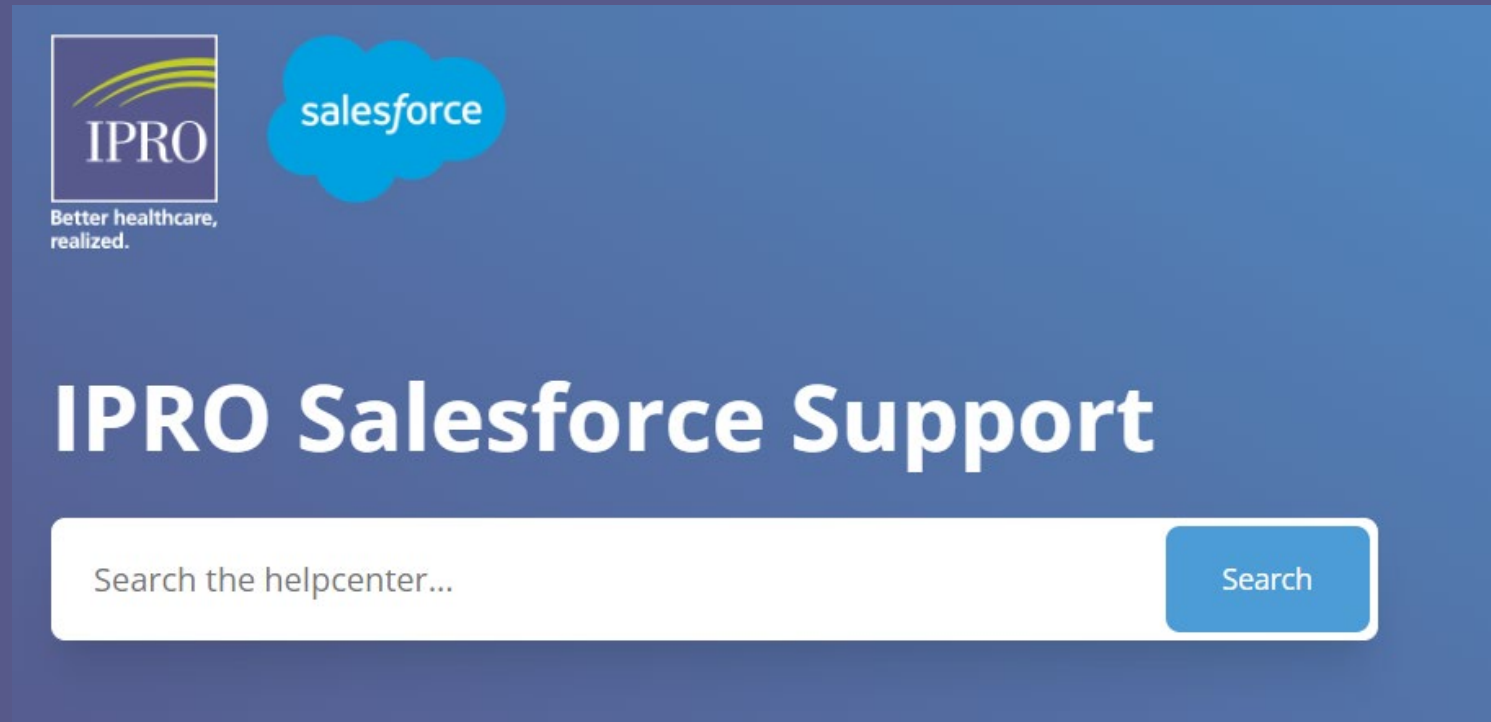
August - 2024 Last Year

ESRD HTN program 12:14 PM | Aug 6, 2024

[okstner@ipro.org](mailto:okstner@ipro.org) sent an email to [shannon@ipro.org](mailto:shannon@ipro.org)

No more past activities to load.

# Questions?



The screenshot shows the top section of the IPRO Salesforce Support page. On the left, there is the IPRO logo with the tagline "Better healthcare, realized." and the Salesforce logo. In the center, the text "IPRO Salesforce Support" is displayed in a large, bold, white font. Below this text is a white search bar with the placeholder text "Search the helpcenter..." and a blue "Search" button to its right.



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<https://salesforce.ipro.help/hc/en-us>