



Connecting New Outlook Email with Salesforce

05/09/2025

What will be covered in this training?

A stylized diagram of a pair of glasses with two circular lenses and a connecting bridge. The top lens is positioned over the first text block, and the bottom lens is positioned over the second text block.

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

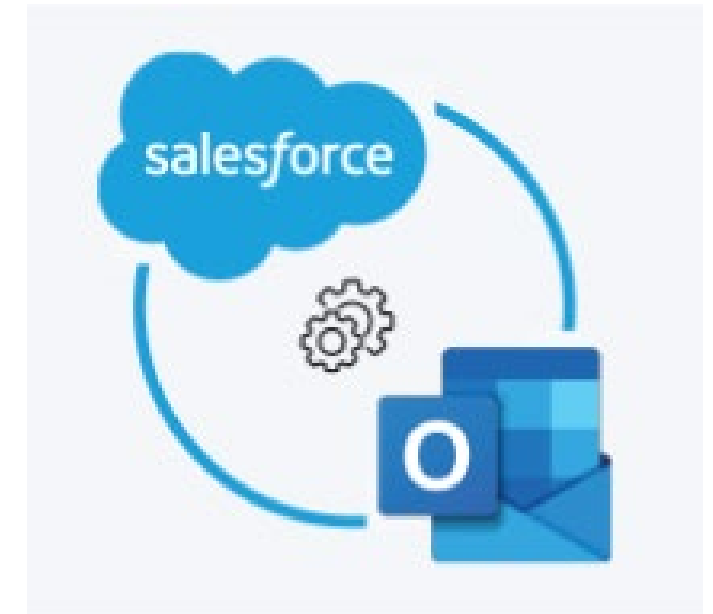


Part 1: Salesforce Outlook Plug-in (New)

Salesforce and Outlook Integration



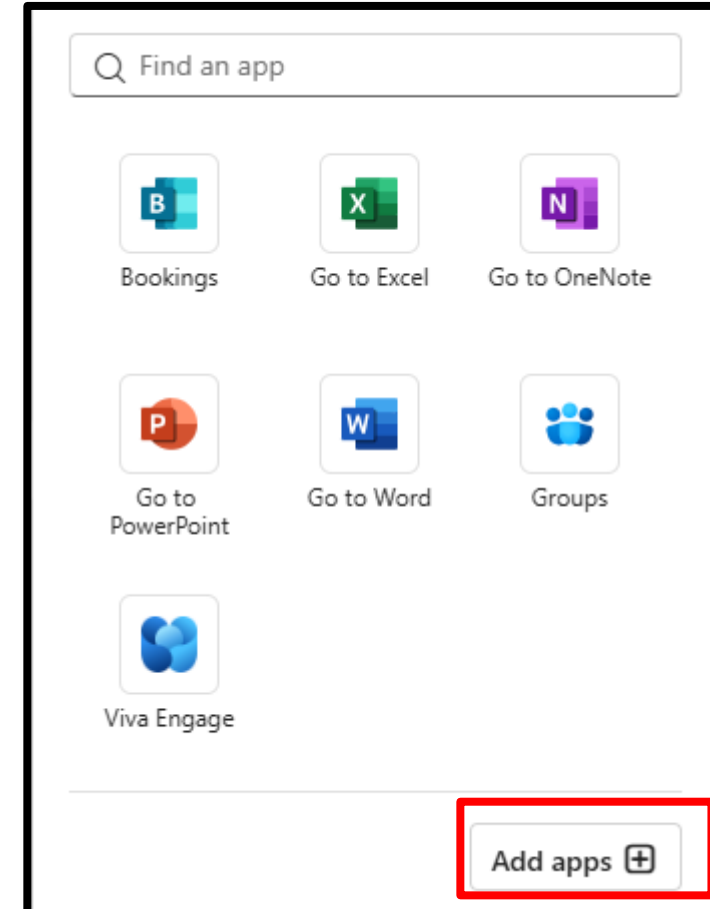
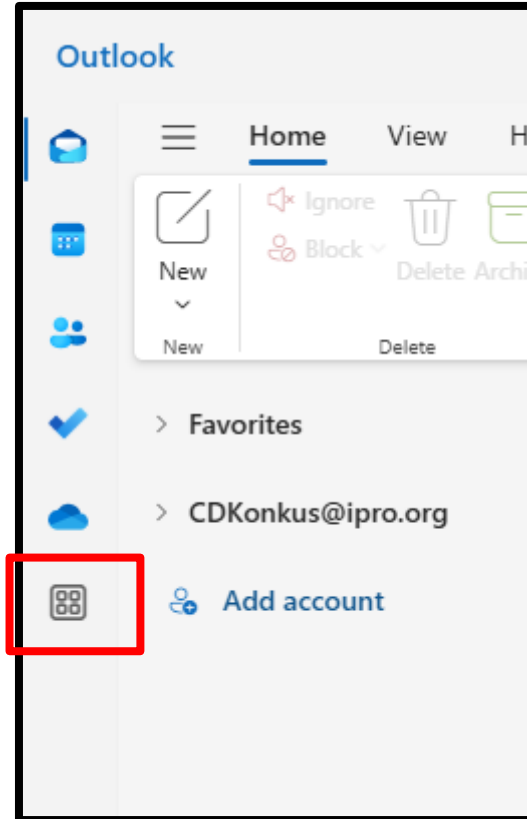
- IPRO has connected Outlook and Salesforce to provide two ways to send email to providers, facilities, hospitals or other IPRO clients
- Sending email from Salesforce allows you to leave an instant copy of the email on the record of the Contact, Case, or Account for future reference by IPRO staff and 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

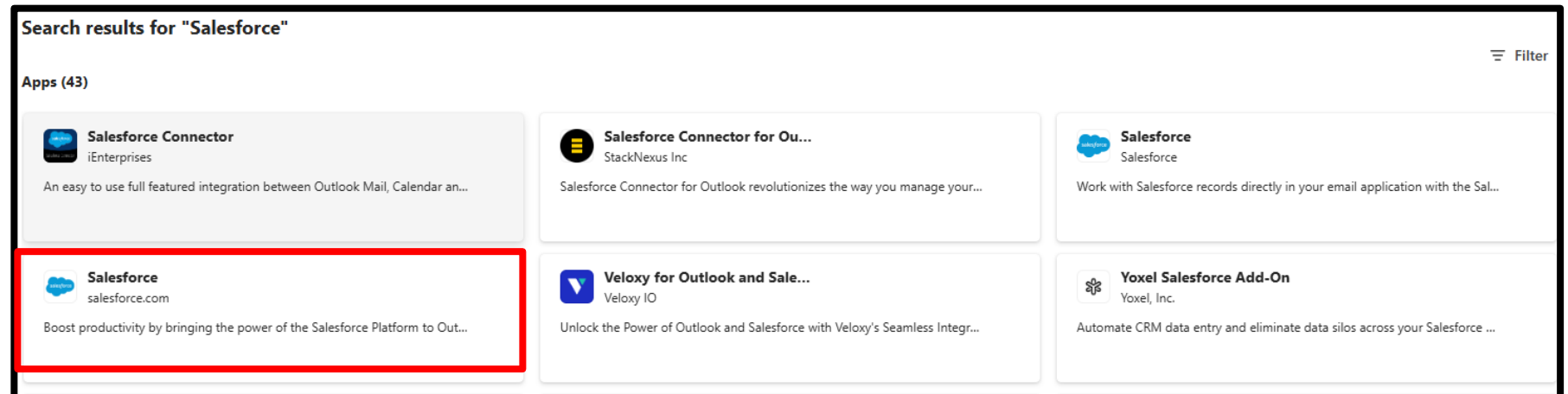
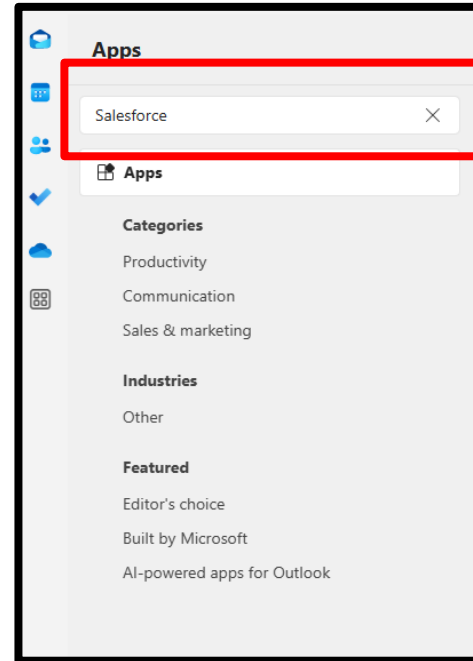
- Before sending an email to Salesforce from Outlook, you first need to download the Salesforce App from Microsoft App Exchange
- From Outlook go to waffle in the lefthand navigation bar. This will open the App options
- Click Add Apps to bring up the App Search function



Sending Email from Outlook to Salesforce



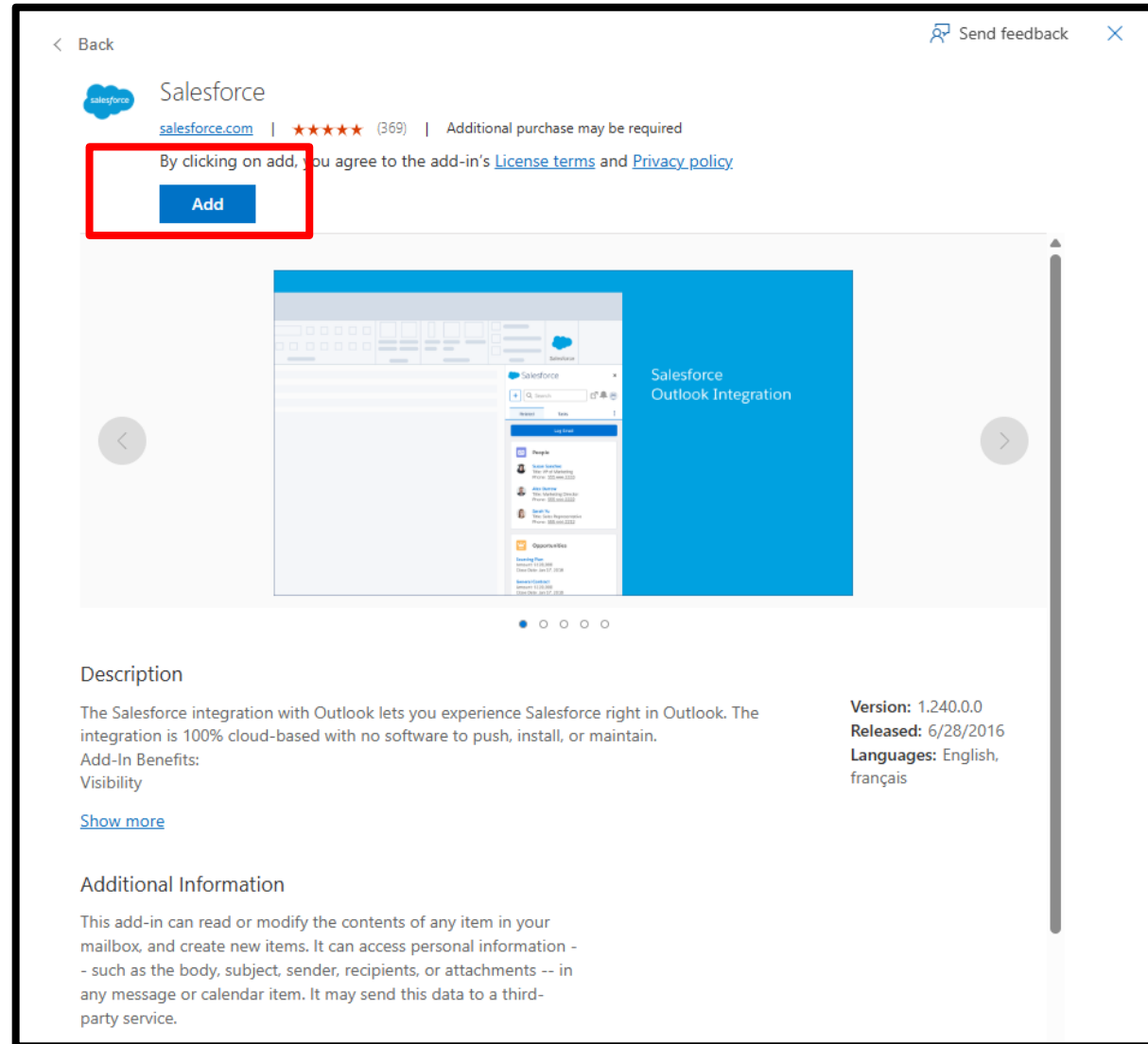
- Enter Salesforce in the Search box. You may see 3 different Salesforce icons. Select the one from Salesforce.com with the description 'Boost productivity'



Sending Email from Outlook to Salesforce



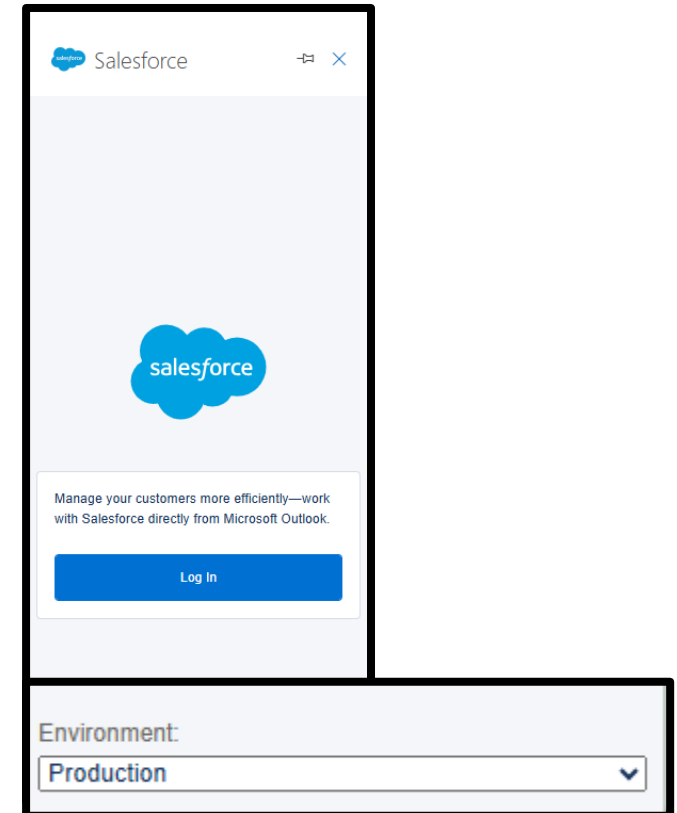
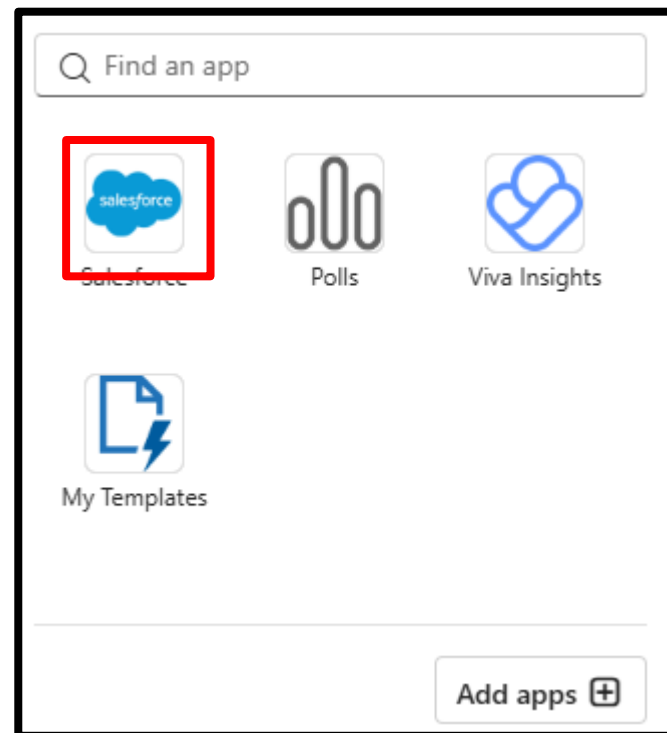
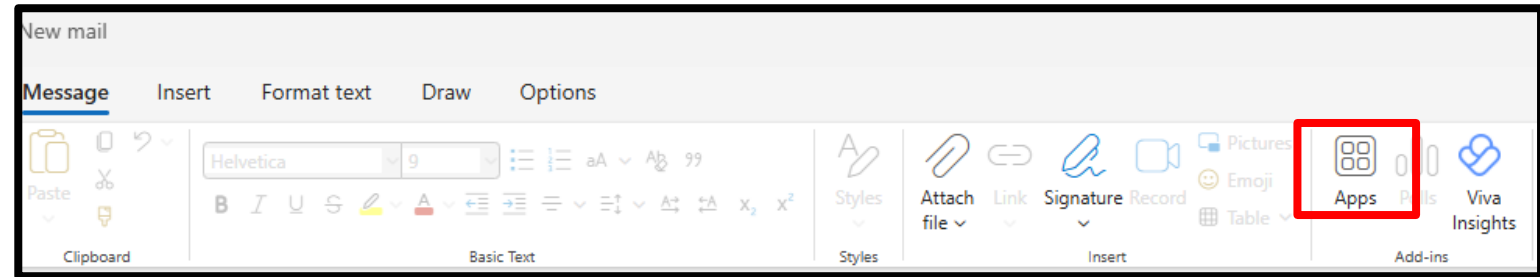
- Select the “Add” button to download and install the application



Connecting Outlook to Salesforce



- Create a New Email from Outlook
- From the new email, you should see a waffle at the top of your screen labeled “Apps”. If you do not see the App waffle, expand your email
- Click on the Salesforce Cloud image and a side bar will appear asking if you want Production or Sandbox. Choose Production and click “Log in”



Connecting Outlook to Salesforce



- You may receive a prompt asking to display a new window, select “Allow”
- You will be redirected to a Salesforce login screen
- Click the “Use Custom Domain” button in the lower right corner
- Enter the following in “Custom Domain”
ipro3.lightning.force.com
- Then select Continue

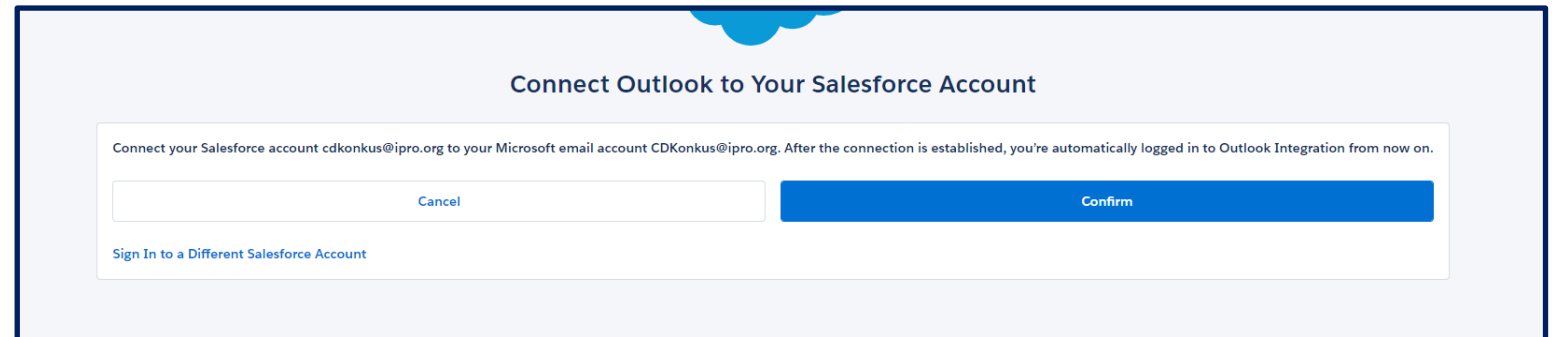
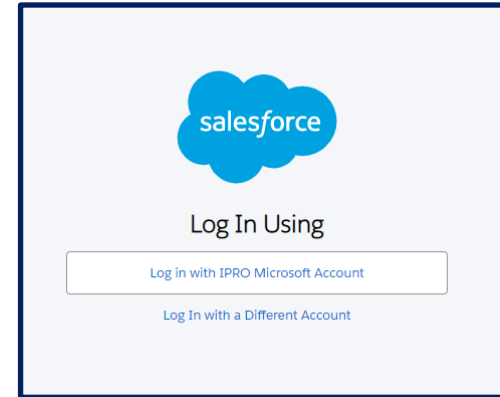
The image shows the Salesforce login interface. At the top is the Salesforce logo. Below it are fields for Username and Password, a Log In button, a Remember me checkbox, and a Forgot Your Password? link. A red box highlights the Use Custom Domain button in the bottom right corner of the login form. At the bottom of the page, there is a link for 'Not a customer?' and a Try for Free button.

The image shows the 'Use Custom Domain' screen in Salesforce. It features the Salesforce logo and the heading 'Use Custom Domain'. Below the heading is a text prompt: 'To go to your company's login page, enter the custom domain name.' A red box highlights the Custom Domain input field, which contains the text 'https://domain.my.salesforce.com'. Below the input field are Back and Continue buttons.

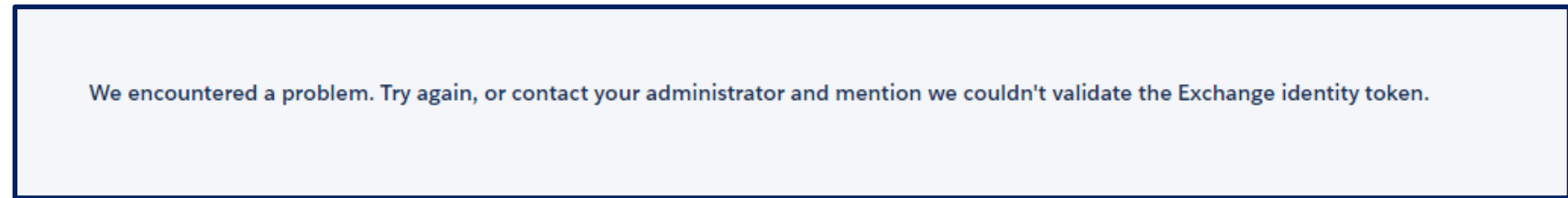
Connecting Outlook to Salesforce



- You will be directed to the same SSO page you see when you log into Salesforce.
- Select either Log in with Microsoft for direct IPRO staff or Log in with Google for IPRO Contractors
- Follow all the login prompts until you are redirected to the page asking if you want to Connect Outlook to Your Salesforce Account.
- Select “Confirm”



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



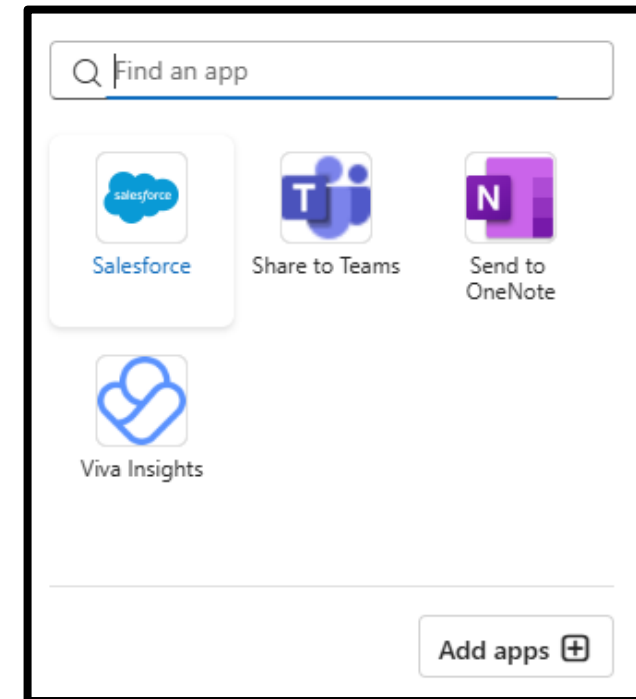
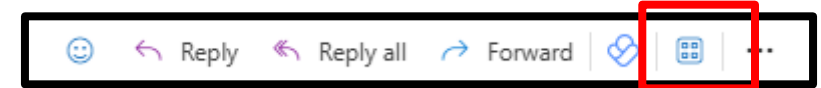
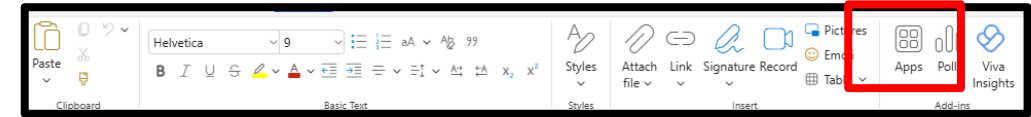
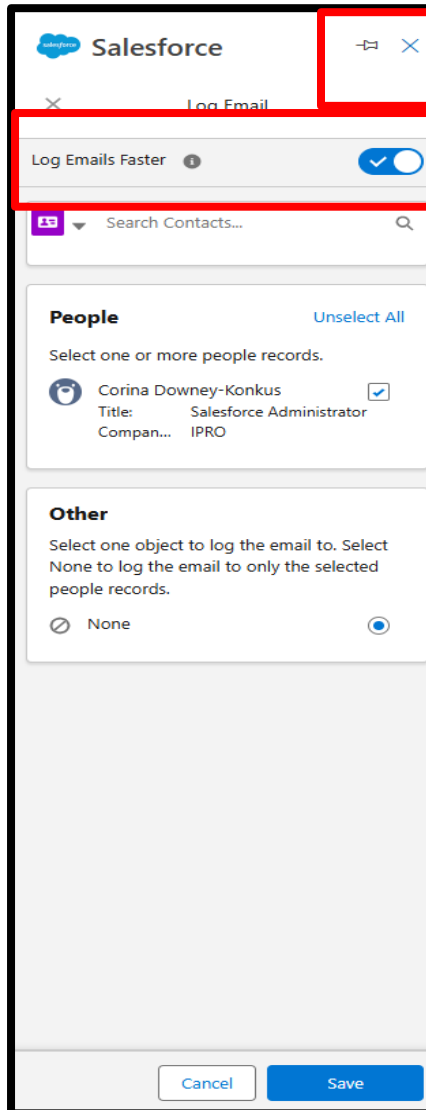
Part 2: Logging Outlook Emails to Salesforce (New)

Sending Email from Outlook to Salesforce

Relating outgoing email messages



- You will now see the following pane inside email message from your Outlook. Toggle “Log Emails Faster” to on
- 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
- If the pane ever disappears, go to any email in your inbox or the ribbon at the top of the screen, and click the little waffle in the corner and click on Salesforce



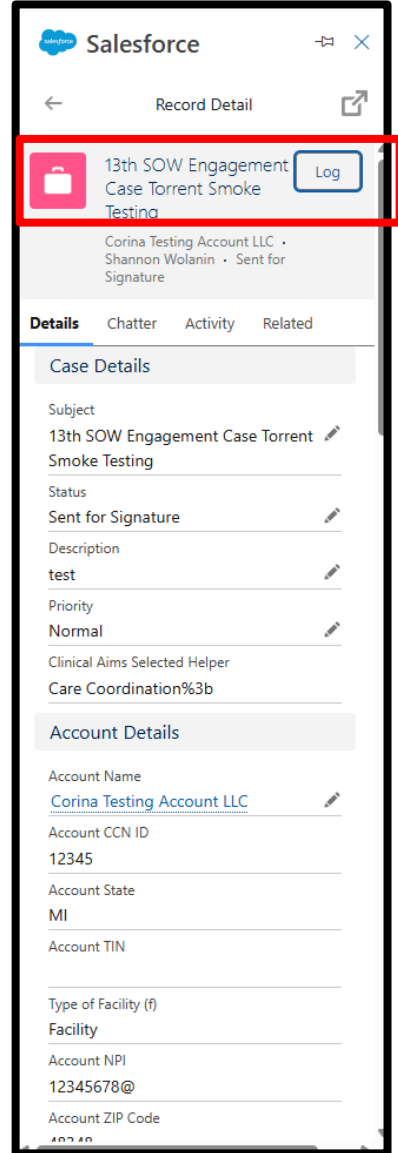
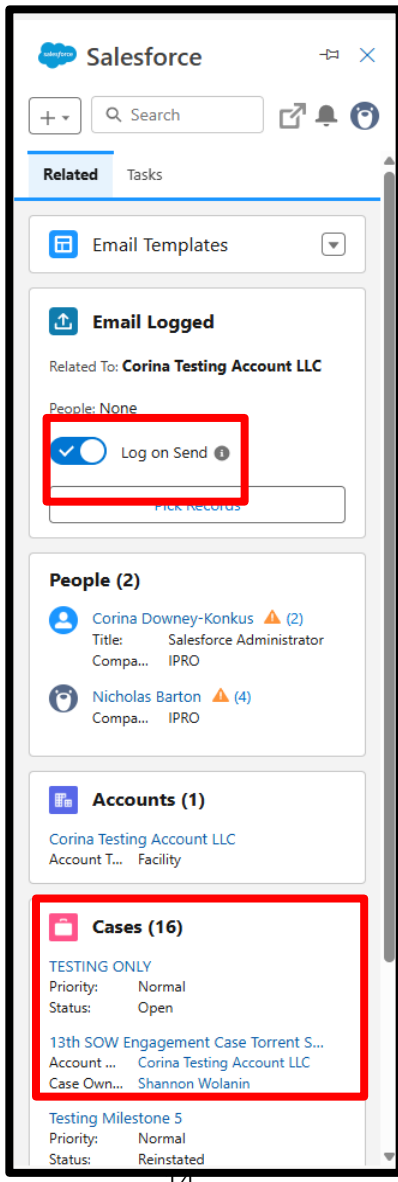
Sending Email from Outlook to Salesforce

Relating outgoing messages

- When you compose an 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 different Salesforce records associated with the Contact.
- Create your email as normal, but prior to sending, make sure that the toggle for “Log on Send” is turned on and select the Case record that relates to the message.
- Confirm that the Case details presented are correct and select “Log”. If there are any other additional records you would like to relate the email to, you may select those from the list using the radio button



Remember: if you select an Account or Contact record as your Related To, the email will be visible to all other departments. Only relating to Case stays private to your department.

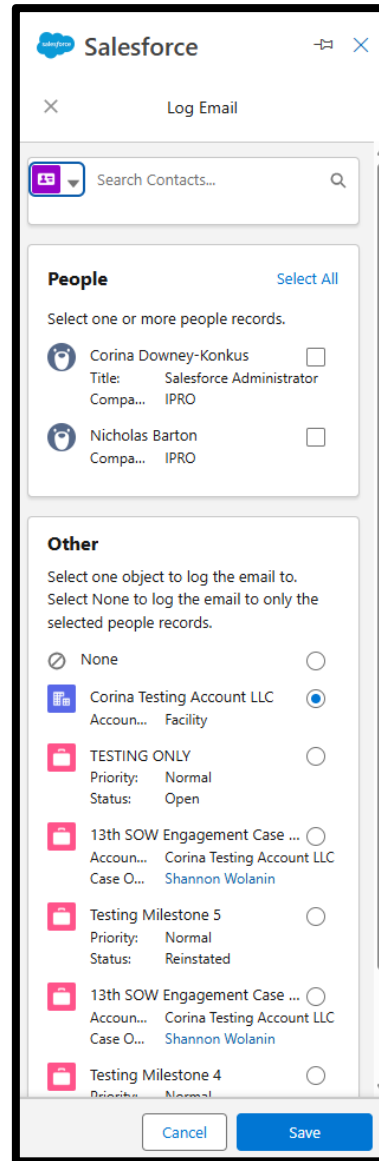


Sending Email from Outlook to Salesforce



Relating outgoing messages

- Once all your records are selected, hit “Save” at the bottom of the pane. You may receive a quick pop-up confirming that your email will be related upon Send.
- You will notice a BCC will appear in your message that shows which Salesforce record the message will relate to
- Finish composing your email and Send

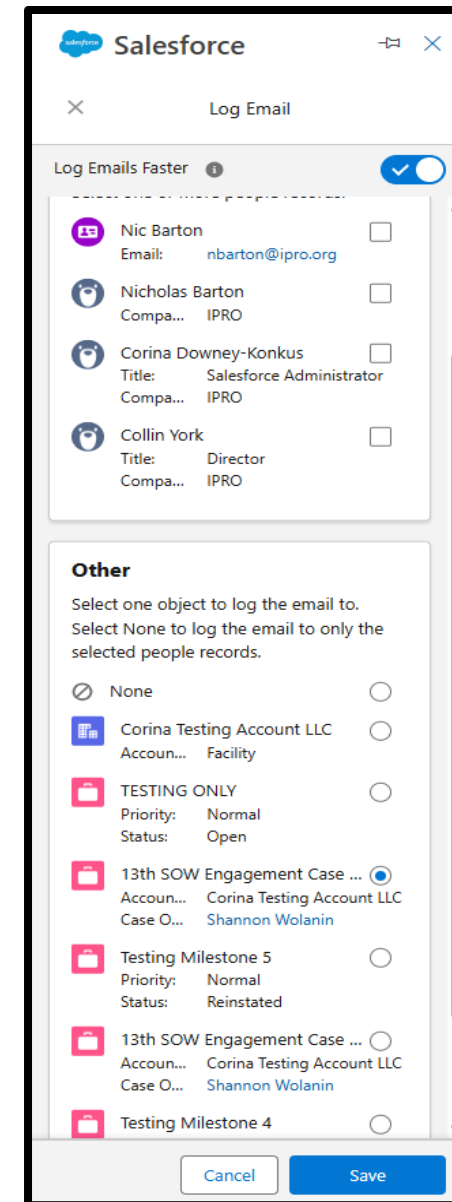
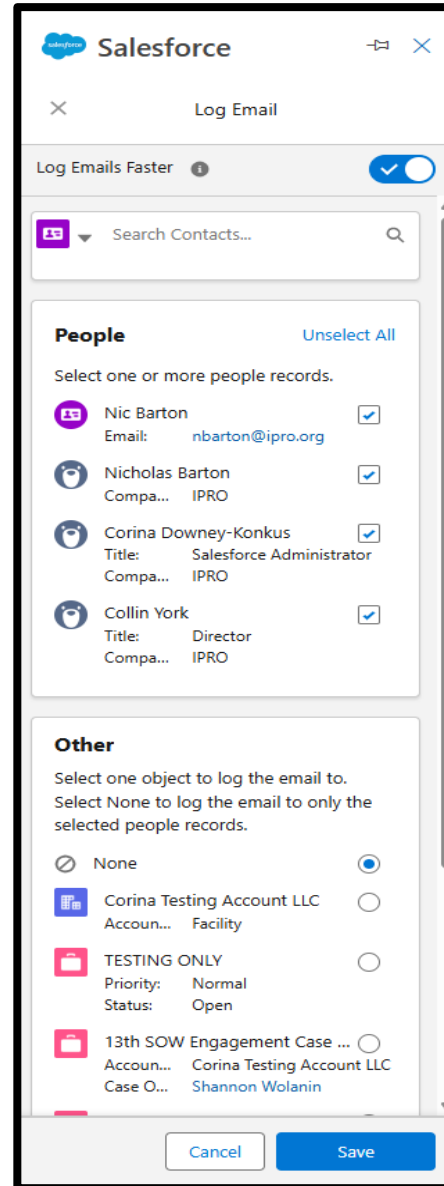


Sending Email from Outlook to Salesforce



Relating incoming messages

- When an email comes into your Outlook inbox and you want to record it as Salesforce Activity, you can send a copy of it over to Salesforce by using the same side pane
- If you do not see the side pane, click on the waffle at in the top tool bar or in the email message itself and click Salesforce
- Salesforce Plug-in will try to relate all the records it finds connecting to the incoming email. Deselect any record that is not appropriate, and select any other that should be assigned



Verifying Email Logged In Salesforce



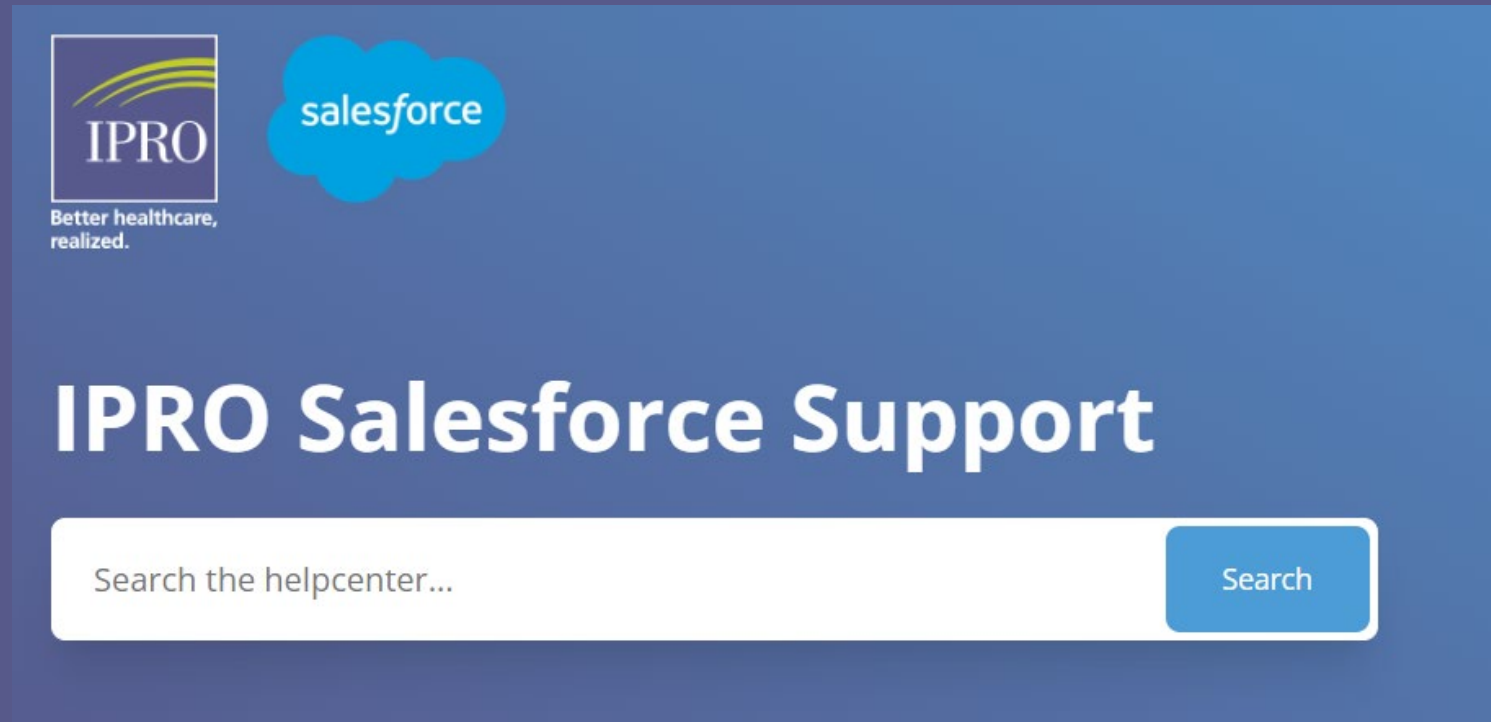
- To verify an email was logged in Salesforce, go to the Account, Contact or Case record in Salesforce and look at the Activities section. You should see an envelope and the title to the email that was sent
- If an email is logged incorrectly and needs to be removed from the system, you will need to put in a Help Desk ticket with the Salesforce Team

The screenshot displays the Salesforce interface for an account record. On the left, the 'Account Details' section shows information for 'Corina Testing Account LLC', including its CCN ID (12345), TIN, NPI (12345678@), and ZIP Code (48348). Below this, the 'Case Information' section lists a case number (00132248), parent case, enrollment date (8/7/2024), closed date (8/8/2024), and contact details for 'Nic Barton' (nbarton@ipro.org). On the right, the 'Activity' section shows a list of activities. A red box highlights two activities: one from May 2025 titled 'Testing Email Sending - Outlook Plugin' sent to nbarton@ipro.org at 12:19 PM, and another from August 2024 titled 'ESRD HTN program' sent to Shannon Wolanin at 12:14 PM on Aug 6, 2024.

Section	Field	Value
Account Details	Account Name	Corina Testing Account LLC
	Account CCN ID	12345
	Type of Facility (f)	Facility
	Account State	MI
	Account ZIP Code	48348
Case Information	Case Number	00132248
	Case Owner	Shannon Wolanin
	Enrollment Date	8/7/2024
	Closed Date	8/8/2024
	Contact Name	Nic Barton

Activity	Date	Time
Testing Email Sending - Outlook Plugin	May - 2025	12:19 PM Today
ESRD HTN program	August - 2024	12:14 PM Aug 6, 2024

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. The main heading "IPRO Salesforce Support" is centered in large white text. Below the heading is a search bar with the placeholder text "Search the helpcenter..." and a blue "Search" button.



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