

Enhancing Outlook with Salesforce Integration

9 Steps [View most recent version](#) 

Created by

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Creation Date

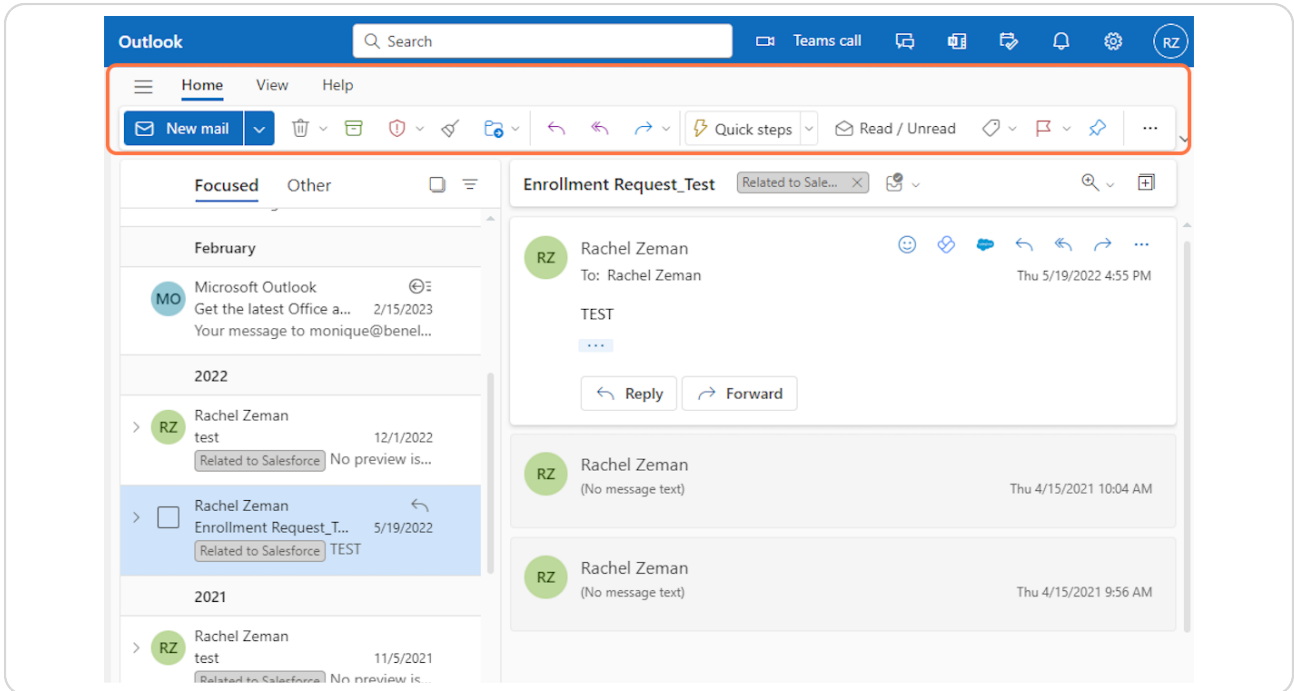
October 20, 2023

Last Updated

October 20, 2023

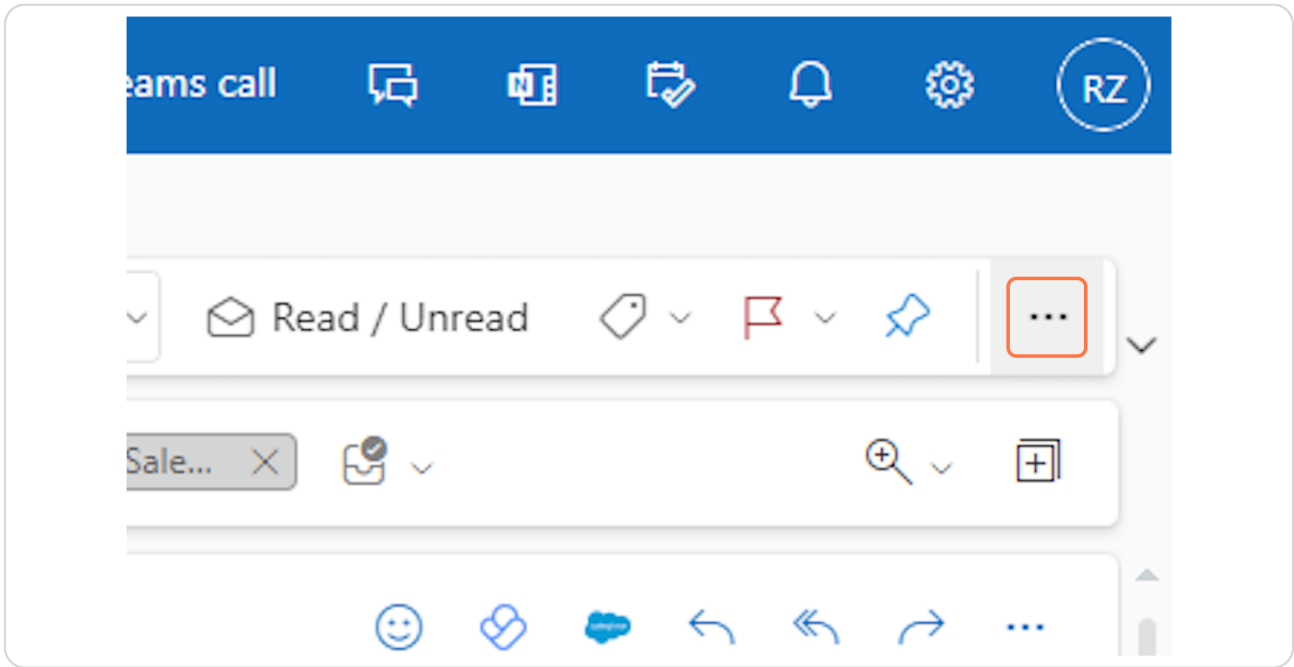
STEP 1

Open Your Outlook



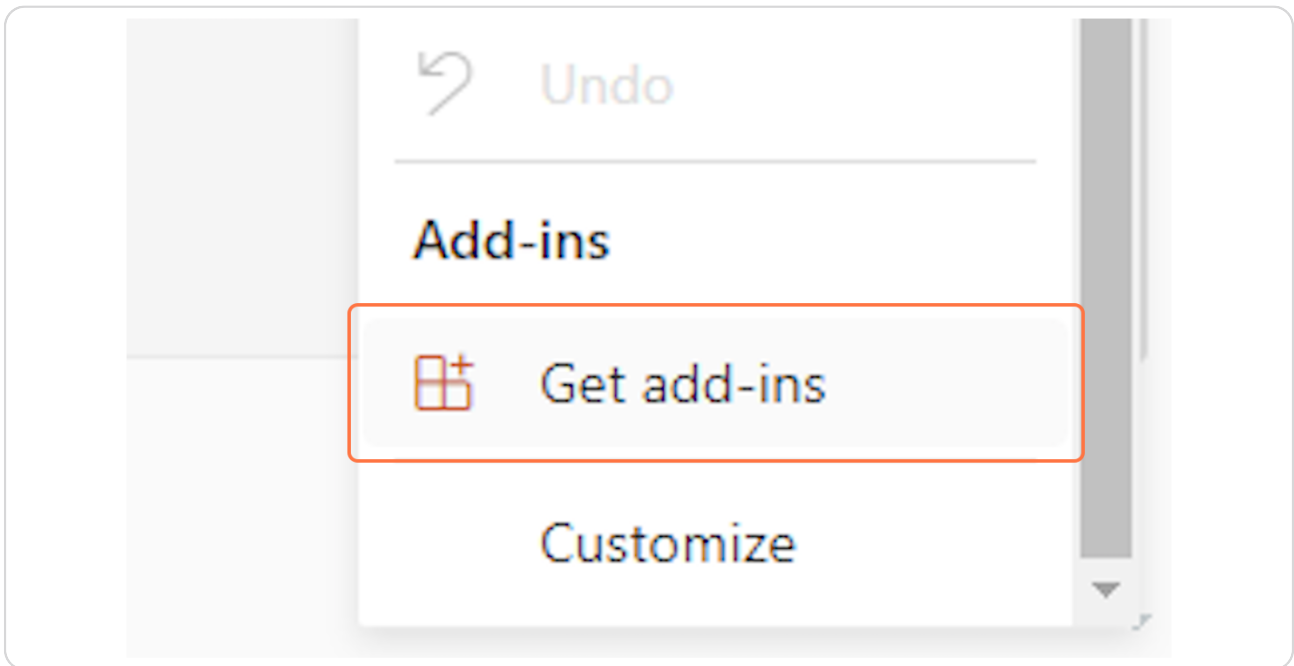
STEP 2

On your Home Tab - Find "Get Add-Ins" button



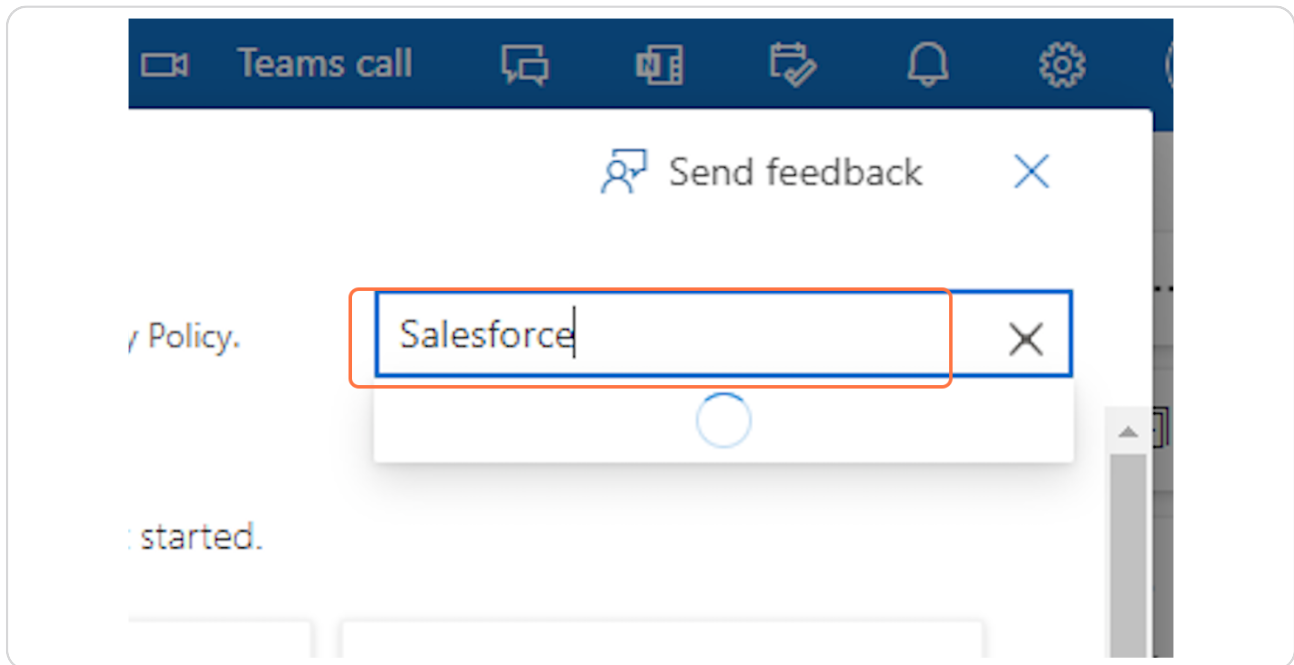
STEP 3

Click on Get add-ins



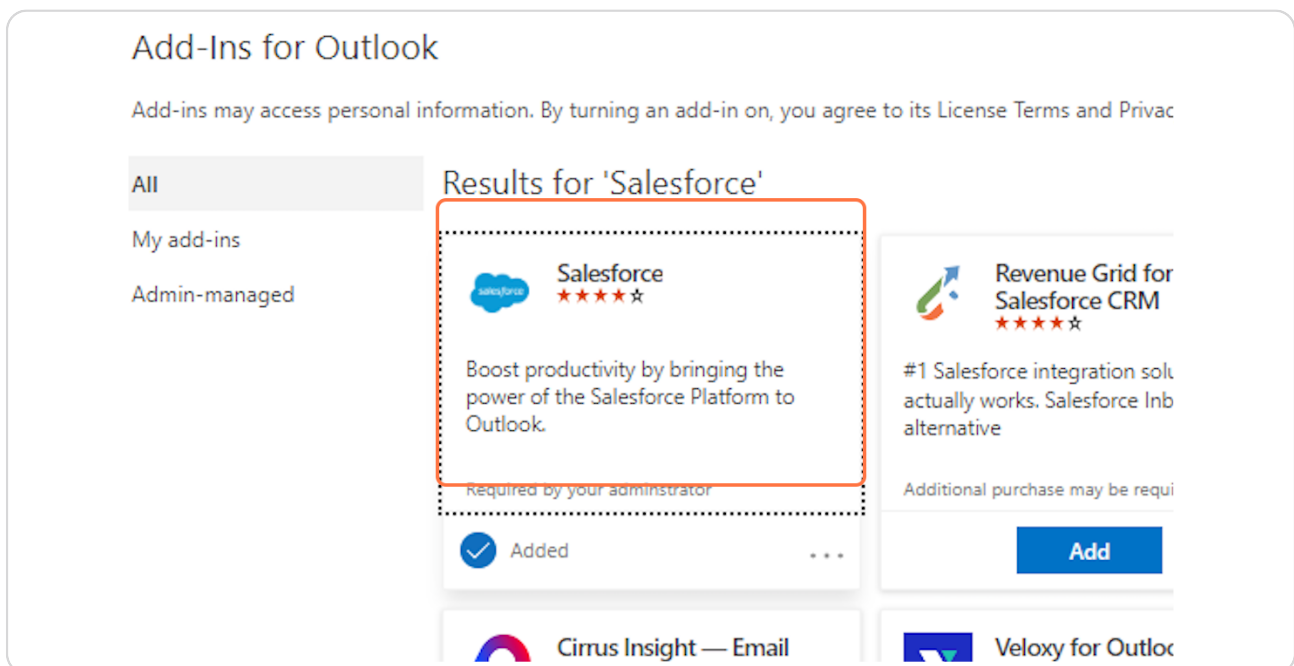
STEP 4

In the search field - Type "Salesforce"



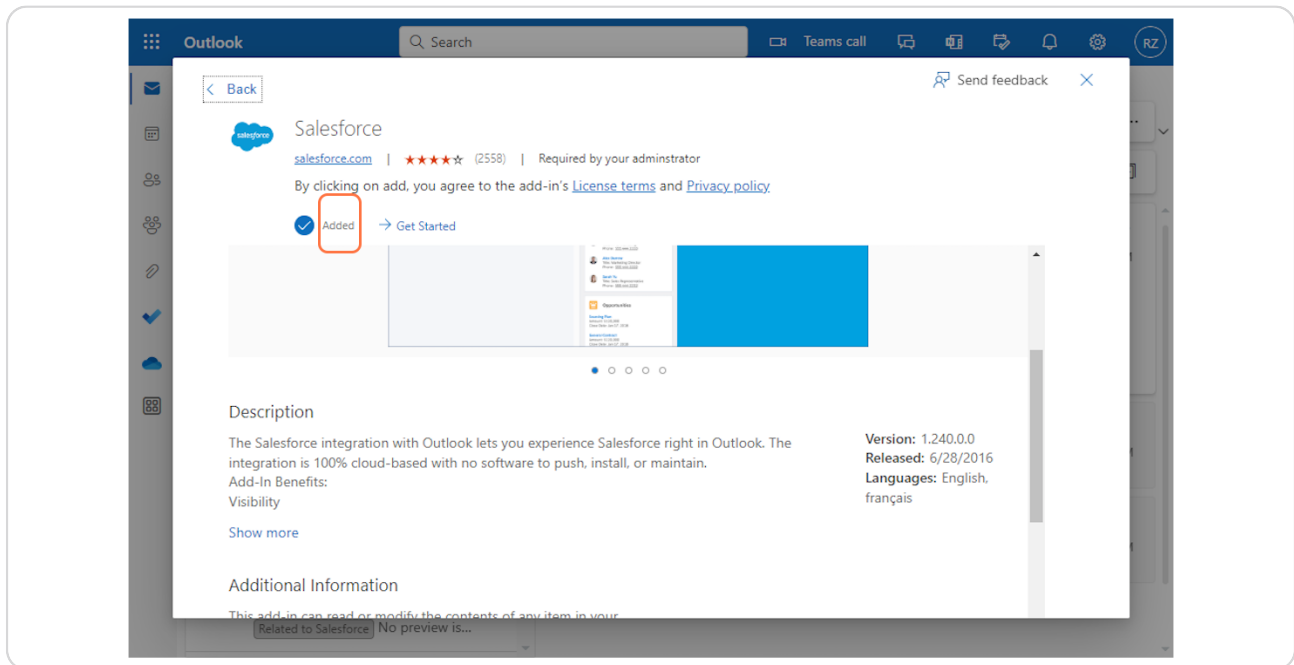
STEP 5

Click on Salesforce...



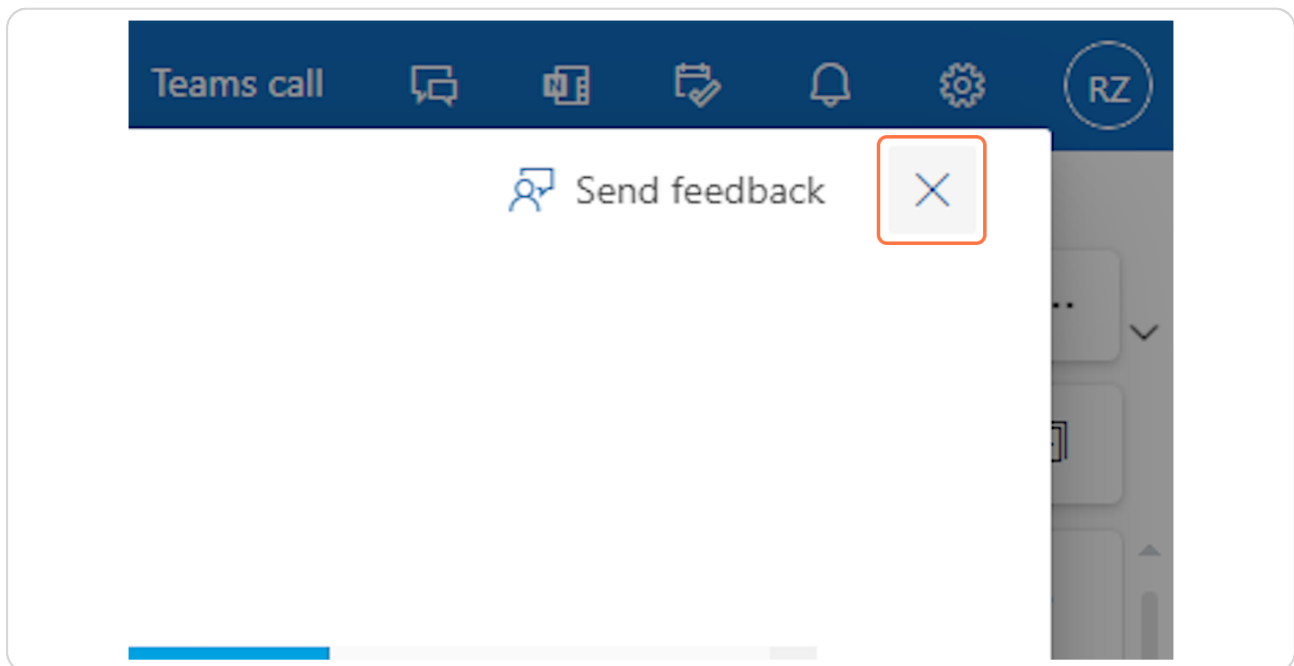
STEP 6

Click on Add



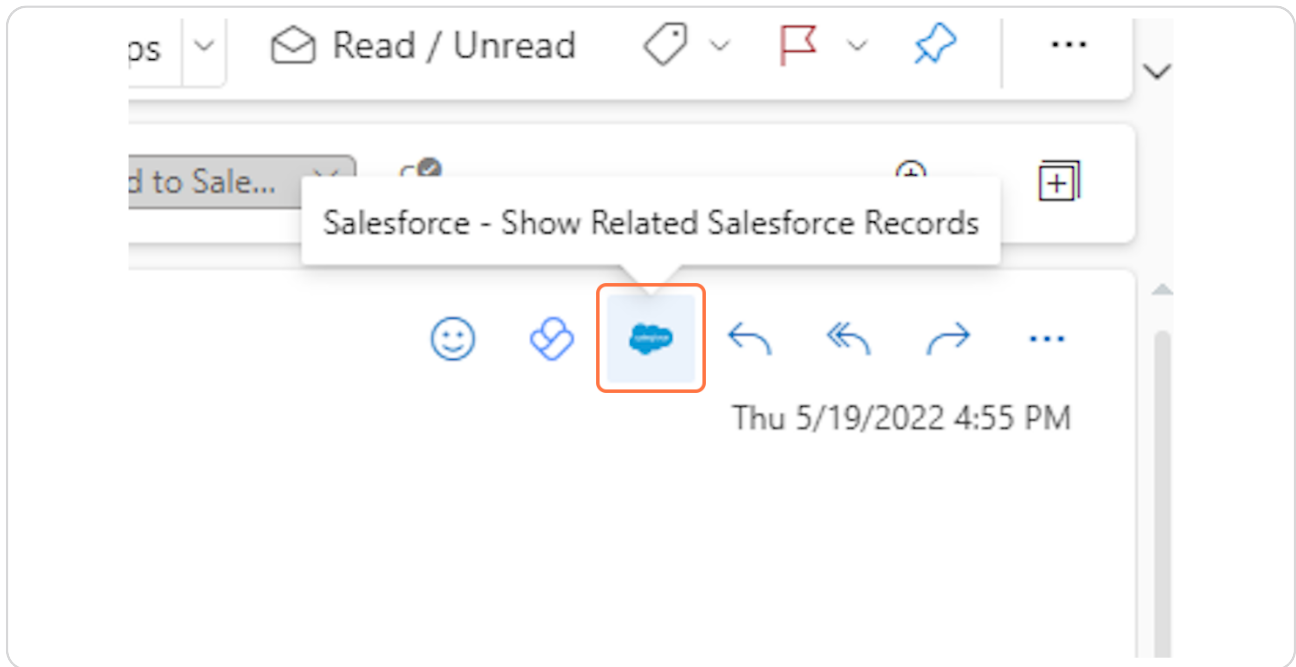
STEP 7

Exit the Add-In window



STEP 8

Click on Salesforce - Show Related Salesforce Records



STEP 9

Click on Pin Salesforce

