

Add Salesforce Add-in to Outlook

02/12/2024 10:53 am EST

Description of Issue:

How do we connect the Salesforce add-in to our Outlook to upload emails?

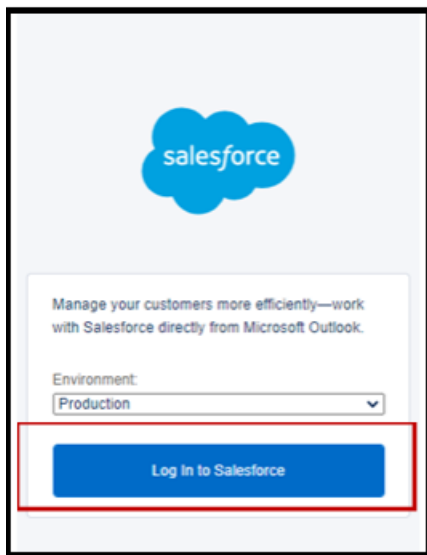
Resolution:

Use the steps below to get the Salesforce Outlook Add-in connected to your account after it has been added to your Outlook.

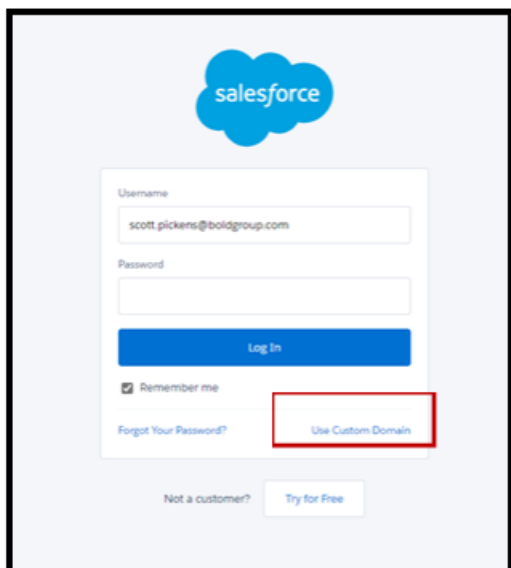
Click the button for the add-in.



Click the Log in to Salesforce.

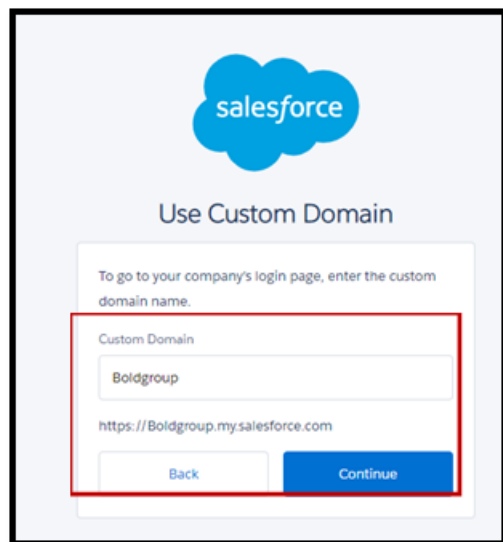


When the login screen opens, click Use Customer Domain.



The image shows the Salesforce login page. At the top is the Salesforce logo. Below it is a login form with fields for Username and Password. The Username field contains the text "scott.pickens@boldgroup.com". Below the Password field is a blue "Log In" button. To the left of the button is a checkbox labeled "Remember me" which is checked. Below the checkbox is a link "Forgot Your Password?". To the right of the "Log In" button is a link "Use Custom Domain" which is highlighted with a red rectangle. At the bottom of the form is a link "Not a customer?" and a button "Try for Free".

Type in "BoldGroup" then press "Continue."



The image shows the "Use Custom Domain" page on Salesforce. At the top is the Salesforce logo. Below it is the heading "Use Custom Domain". Below the heading is a text box with the instruction "To go to your company's login page, enter the custom domain name." Below the text box is a form with a field labeled "Custom Domain" containing the text "Boldgroup". Below the field is the URL "https://Boldgroup.my.salesforce.com". At the bottom of the form are two buttons: "Back" and "Continue". The "Continue" button is highlighted with a red rectangle.

Click "Okta SSO" at the bottom of the page.



To access this page, you have to log in to Salesforce.

Username

scott.pickens@boldgroup.com

Password

Log In

☒ Remember me

[Forgot Your Password?](#)

Enter your Okta Username and Password, then press “Sign In”



Sign In

Username

Password

☐ Remember me

Sign In

Need help signing in?

Confirm the connection to Outlook.



Connect Outlook to Your Salesforce Account

Connect your Salesforce account scott.pickens@boldgroup.com to your Microsoft email account scott.pickens@boldgroup.com. After the connection is established, you're automatically logged in to Outlook Integration from now on.

Cancel Confirm

[Sign In to a Different Salesforce Account](#)