

## YFC Email-Salesforce Integration Options

**Purpose:** To list and describe options for integrating email with YFC Salesforce organizations.

The following options are available for email integration with Salesforce.

### 1. Email to Salesforce

If you use a company-provided or third-party email account, you can use Email to Salesforce to assign emails to leads, contacts, opportunities, and other records in Salesforce. When composing, forwarding, or replying to email, simply enter your *Email to Salesforce* address in the BCC field or any recipient field. Salesforce receives a copy of the email and, depending on your configuration, adds it to either the Activity History related list of the matching records or to the *My Unresolved Items* page, where you can manually assign it.

**Price:** Free  
**Prerequisites:** None  
**Implementation:** Configuration within Salesforce

### General Usage

After some initial configuration, an *Email to Salesforce* email address will be generated for you.

Your Email to Salesforce address: [emailtosalesforce@y-1vg87n22qn7uoy43srx81qx37btk77223ahffd97rtchow185.i-1moipeay.na16.le.salesforce.com](mailto:emailtosalesforce@y-1vg87n22qn7uoy43srx81qx37btk77223ahffd97rtchow185.i-1moipeay.na16.le.salesforce.com)

- a. To have an email logged to Salesforce:
  - i. Compose an email.
  - ii. Enter your Email to Salesforce address in the BCC field of your email.
  - iii. Enter desired recipients in the To, CC, and BCC fields.
  - iv. Send the email.

The screenshot shows an email composition window. The 'To' field contains 'Matt Foster'. The 'Bcc' field contains the email address 'emailtosalesforce@y-1vg87n22qn7uoy43srx81qx37btk77223ahffd97rtchow185.i-1moipeay.na16.le.salesforce.com'. Below the fields, there are two lines of text: 'This email will be logged in Salesforce'. The email is from 'Jordan Junkermeier'. An arrow points from the 'Bcc' field to the 'Activity History' section of a contact profile for 'Matt Foster'. The 'Activity History' section shows a table with columns 'Action' and 'Subject'. The table contains one entry: 'Email: This email will be logged in Salesforce'. Below the table are links for 'Show more »' and 'Go to list »'.

## 2. Salesforce for Outlook

Salesforce for Outlook, an application that you install, automatically syncs contacts, events, and tasks between Outlook and Salesforce. And most importantly, you can see Salesforce contacts and leads related to your Outlook emails. In Outlook, you'll manually add your emails to these contacts and leads, as well as other Salesforce records related to them, like accounts, opportunities, and cases. Salesforce for Outlook works with Outlook 2013, Office 365, and the Outlook Web App (OWA).

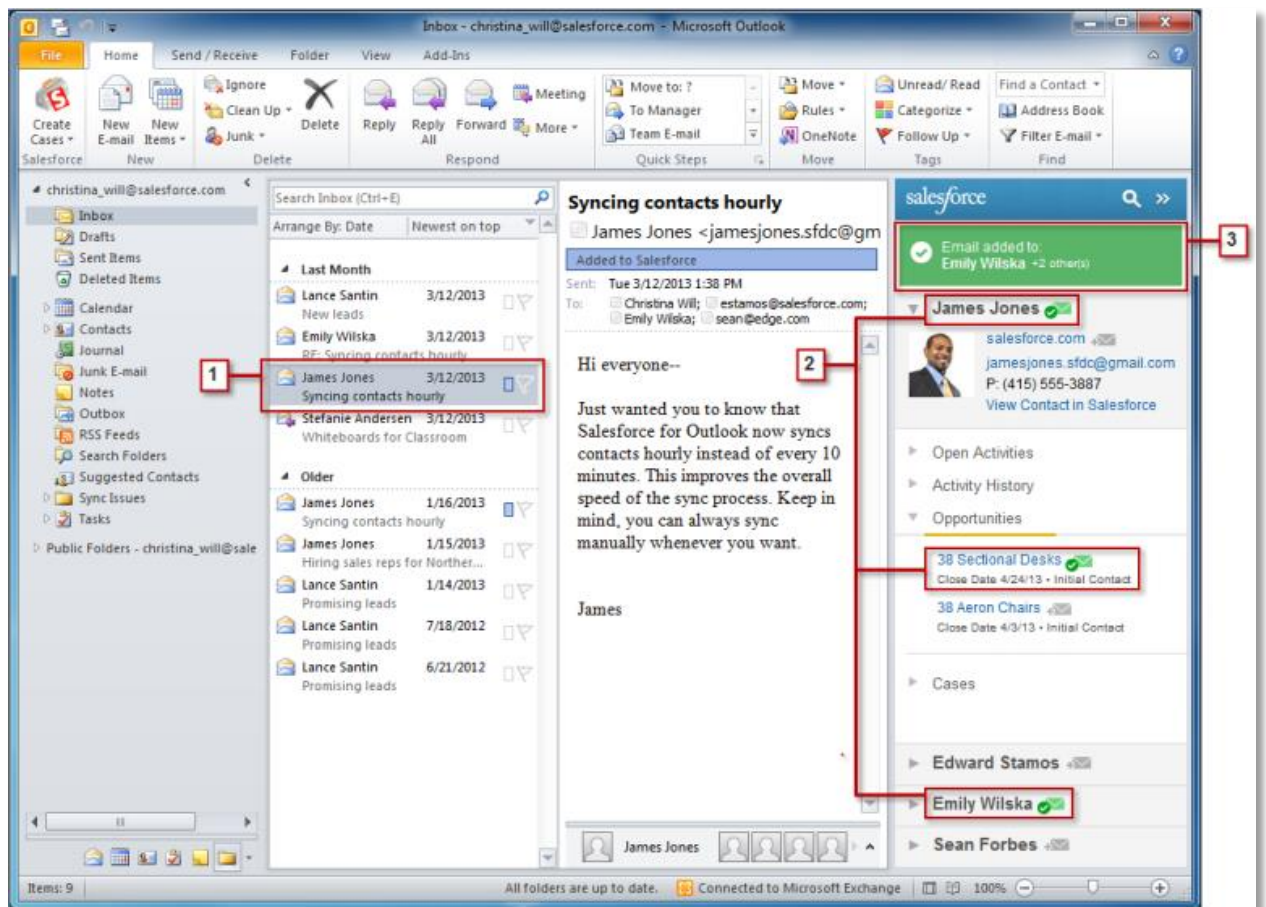
**Price:** Free



**Prerequisites:**

- Microsoft Outlook (Microsoft Exchange Online or Microsoft Exchange Server)
- Windows Vista or later

**Implementation:** Application download, application installation, configuration in Outlook

### General Usage



1. Select an email in Outlook. The side panel displays Salesforce records related to the contacts in your email.
2. Next to each Salesforce record to which you're adding your email, click . After you add the email, the added email indicator  appears next to those records.
3. Keep track of the records to which you added your email.

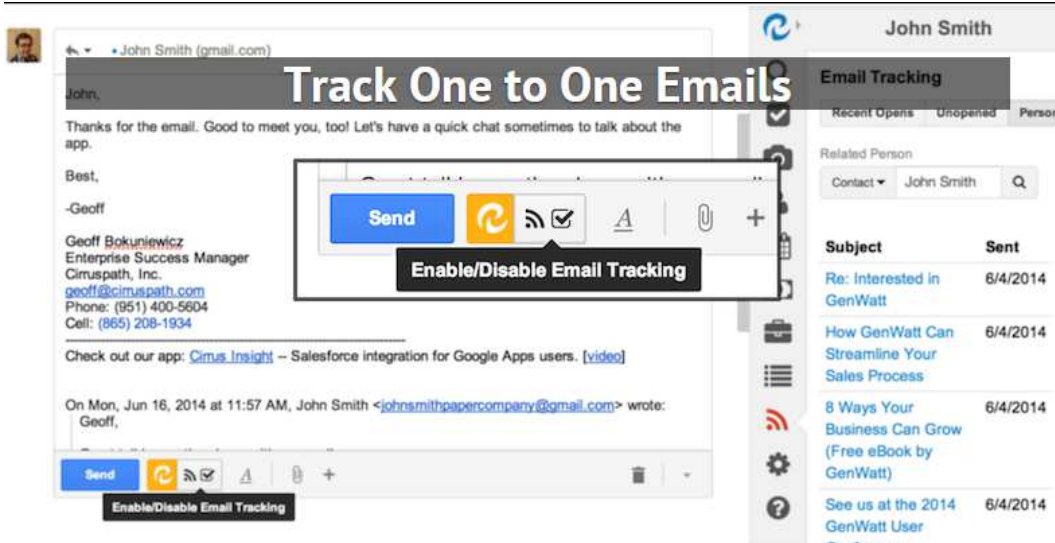
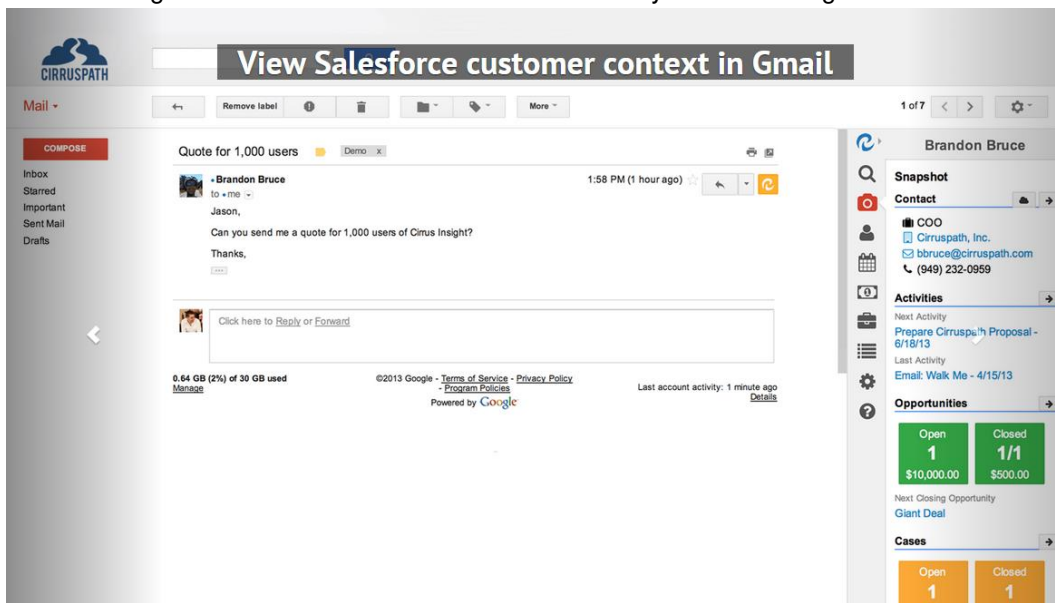
### 3. Cirrus Insight

Cirrus Insight is a Gmail add-on that allows you to view contextual Salesforce information in your Gmail inbox and gives you the option to save emails and attachments to Salesforce with one click. You can track who has opened your emails, create and edit Salesforce records directly from Gmail, use Salesforce email templates to send emails, set reminders, and create Salesforce task, all from Gmail. As you open an email, you'll immediately see a snapshot summary of the sender's records in Salesforce, including a summary of open and closed opportunities and cases.

**Price:** \$19 per user per month  
**Prerequisites:** A Gmail account  
**Implementation:** Cirrus account creation, one-click installation.

#### General Usage

The following screenshots demonstrate the functionality of Cirrus Insight:



## Save emails to Salesforce

**Support request**

Brandon Bruce  
to me

Hi Jason,

Can you help me

Thanks,

Click here to [Reply](#)

1.01 GB (3%) of 30 GB used  
[Manage](#)

**Add To Salesforce**

**Log Information**

Subject \* Proposal attached

Related Person Contact \* Brandon Bruce

Relate To Account \*

**File Attachments**

Proposal.docx

Please note that it can take several minutes before attachments are available in Salesforce.

**Google Drive Attachments**

No Google Drive attachments to display.

Close Save

1 of 7

**Bobby Buyer**

**Snapshot**

**Contact**

CEO, Co-founder  
Buyer, Co.

bobbybuyer56@gmail.com  
(555) 555-1234  
(555) 555-1236

**Activities**

Next Activity

None

Last Activity

Partot List Email: Are You Ready for Dreamforce 2013? - 11/12/13

**Opportunities**

Open	Closed
2	2/2
\$110,000.00	\$20,045.00

Next Closing Opportunity

None

**Cases**

Open Closed

## Create leads and contacts

**Quote for 1,000 users** Demo x

Brandon Bruce  
to me

Jun 17 (3 days ago)

Jason,

Can you send me a quote for 1,000 users of Cirrus Insight?

Thanks,

Click here to [Reply](#) or [Forward](#)

0.65 GB (2%) of 30 GB used  
[Manage](#)

©2013 Google - [Terms of Service](#) - [Privacy Policy](#) - [Program Policies](#)  
Powered by [Google](#)

Last account activity: 4 minutes ago  
[Details](#)

**Create leads and contacts**

**Contact Information**

Salutation -- None --

First Name Brandon

Last Name \* Bruce

Account Cirruspath, In

Title

Lead Source Search Engine

Reports To Contact \*

Save Cancel

1 of 7

**Brandon Bruce**

**Contact**

**Contact Information**

Salutation -- None --

First Name Brandon

Last Name \* Bruce

Account Cirruspath, In

Title

Lead Source Search Engine

Reports To Contact \*

Save Cancel

## Use Salesforce templates in Gmail

**Support request**

Brandon Bruce  
to me

Hi Jason,

Can you help me

Thanks,

Click here to [Reply](#)

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[Manage](#)

**Email Templates**

**Choose a Template**

Folder \* 14-day Trial

Trial Start Webinar Invite

**Merge Inputs**

Selected Template: Trial Start Webinar Invite

Related Person Contact \* Brandon Bruce \*

Relate To

Close Merge

1 of 7

**Brandon Bruce \***

**Snapshot**

**Contact**

COO  
Cirruspath, Inc \*

bbruce@cirruspath.com  
(949) 232-0959  
(013) 924-55771

**Activities**

Next Activity

Huey Lewis Concert!!! - 8/26/13

Last Activity

Email: Cirrus Insight Registered Users - 8/26/13

**Opportunities**

Open Closed

## Additional Email-Salesforce Integration Options

The following are alternatives to the above integration options. These items are either currently available only as beta features with known limitations, or miscellaneous 3rd- party apps.

### 1. Outlook Exchange Sync **Summer '15**

Keep the contacts and events in your users' Exchange-based email systems in sync with contacts and events in Salesforce without asking users to install and maintain software on their workstations.



Exchange Sync is currently available as a beta feature, which means it's a high-quality feature with known limitations. Check out our [Exchange Sync Implementation Guide](#) to set up the feature at your company.

### 2. Match My Email – Sync Outlook, Gmail, Mac, IMAP – for Salesforce

Add emails to Salesforce automatically from any device. Roll up to Accounts & Opportunities. Create “perfect” email data in Salesforce for reports. Precision match to Opportunities using custom tags. Platform independent, works with everything. Embedded emails in every record.

**\$14.95 per user per month**

### 3. Connect for Outlook **Being retired in Winter '16**

The legacy Salesforce-email integration application, Force.com Connect for Microsoft Outlook, lets you interact with Salesforce from Microsoft Outlook 2007 and earlier.