

# HOW TO: SALES CLOUD:

## Set up “Lightning for Outlook”

### Get started with Lightning for Outlook and Lightning Sync.

Give your sales reps the ability to add emails and other important information to their Salesforce records. In this Accelerator, we will help you work more efficiently in Outlook, while capturing key information in Salesforce. If you'd like, we can also help you set up Lightning Sync to synchronize events and contact information with Salesforce.

### What it can do for you.

- Increased accuracy of data as reps can capture emails and relate them directly to records in Salesforce
- Visibility into your Salesforce data right from within Outlook
- With Lightning for Outlook you can : Search records, create and edit records, post directly to chatter, and much more.
- With Lightning Sync you can: automatically sync your contacts and events, associate events and contacts with Salesforce records.
- Reduces IT overhead as no upgrades or installations are required.
- Time savings, no dual entry of critical Salesforce data including emails, contacts, and events

### How It Works

A Certified Specialist will guide you through the process via two-three calls totaling 2-4 hours over 1 to 2 weeks.

#### Delivery

- Setup and configure Lightning for Outlook or Lightning for Outlook and Lightning Sync on one machine
- Review key capabilities of Lightning for Outlook or Lightning for Outlook and Lightning Sync
- Provide guidance and best practices on rollout and advance features

#### Outcomes

- Lightning for Outlook or Lightning for Outlook and Lightning Sync will be installed on one machine.
- Guide to existing resources to help you leverage the Lightning for Outlook or Lightning for Outlook and Lightning Sync Salesforce integrations.

### ADDITIONAL INFORMATION

#### Premier or Signature

Time you will spend on this Accelerator: 2-4 hours

#### GOAL

Drive sales rep productivity and efficiency

#### INTENDED USER

Any customer looking for guidance getting Lightning for Outlook and Lightning Sync up and running.

#### PREREQUISITES

- Must have Premier or Signature Success Plan attached to licenses from Sales Cloud
- Only covers Lightning for Outlook and Lightning Sync
- Works with both Lightning AND Salesforce Classic
- For customers using Outlook/ Exchange 2013, 2016 and/or Office 365
- Must be implemented in an established Sales Cloud org
- Lightning for Outlook supports Outlook 2016 for Mac.
- No code or data migration is included

To schedule your 1-on-1 Accelerator, [visit our Help Portal](#), or contact your account executive or success team today!

#### Corporate Headquarters

The Landmark @ One Market Street  
Suite 300  
San Francisco, CA 94105  
United States  
1-800-NO-SOFTWARE  
[www.salesforce.com/services-training/add-ons/accelerators](http://www.salesforce.com/services-training/add-ons/accelerators)

#### Global Offices

Latin America +1-415-536-4606  
Japan +81-3-5785-8201  
Asia / Pacific +65-6302-5700  
EMEA +4121-6953700

