Salesforce for Outlook
Retirement

CloudKettle

Salesforce for Outlook *Retirement*

Overview

The Salesforce for Outlook plugin allows users to sync data (such as email, calendar, tasks and contacts) between Microsoft Outlook and Salesforce. For many years, this plugin has been the go-to for Salesforce customers who are using Microsoft Outlook as their email application. In past releases, Salesforce announced they will retire the plugin since it was built on older technology and architecture. They also mentioned focusing on new integrations that will provide enhanced functionality and better user experience.

Retirement Impact and Consideration

Feature Impact

Administrators, Developers and Users will no longer have access to the plugin's configuration settings. Regardless of the inability to access the settings, there is no impact on records (e.g Task, Event, Emails and Contacts) that were previously created by this integration.

Data Impact

Admins and Users will only lose access to the configuration and previously created or updated Salesforce and Microsoft Outlook records will not be affected. Users will not lose any Microsoft Outlook data that has synced to Salesforce before the 2024 product retirement. That is, any information from Microsoft Outlook contacts, events, tasks, or emails that were added or synced to Salesforce remains in Salesforce.

Feature Impact

After 2024 retirement, Contacts, events, or tasks will no longer be synced between Salesforce and Microsoft Outlook. The Configurations and Settings page will now be inaccessible which means users won't be able to update their personal settings as well as complete any unresolved items (there are still some features that can assist users for any unresolved items such as Einstein Activity Capture Lightning Sync, and Email to Salesforce).

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The many Salesforce-Outlook Integrations

Salesforce has introduced several integrations for Outlook, and the similar naming conventions can some confusion. Here are the integration names and descriptions.

Integration Name	Description
1. Salesforce for Outlook	The now Legacy product of Salesforce which will be retired June of 2024. This application is used for syncing emails, tasks and contacts from Outlook to Salesforce. This application also supports creating of new records such as cases, contacts, leads and and opportunities from Outlook to Salesforce.
2. Salesforce Outlook Integration	The new feature of Salesforce which will integrate Salesforce to Outlook and works in almost the same way as the legacy Salesforce for Outlook. Users need to manually install the Salesforce Application before they can use it.
3. Lightning for Outlook	Legacy name of Salesforce Outlook Integration which is the replacement of Salesforce for Outlook.
4. Salesforce Inbox	Salesforce Inbox is an add-on for Salesforce that enables sales reps to manage their emails and see all the relevant records alongside those emails. The tool allows Salesforce users to have control over their communications, monitor email metrics, and even schedule meetings and emails.

Retirement Announcements and Timeline

Salesforce Outlook Integration Timeline
Announcements Per Release

WINTER '19	SUMMER '21	SUMMER '23	WINTER '24	SUMMER '24
Salesforce for Outlook was moved to "Maintenance Only" which reduced availability to existing users.	**Salesforce** announced that they will retire **Action Menu.** The New Button was no longer available in the side panel.	**Salesforce** announced additional time for **Salesforce for Outlook** retirement.	**Salesforce** released migration plan and additional resources for **Salesforce Outlook Integration** and **Einstein Activity Capture**.	**Salesforce for Outlook** will be fully retired. Users will no longer be able to use or install the application.

In the Winter '19 release, Salesforce announced that they will be retiring the Salesforce for Outlook and provided guidance for a smooth transition.

Winter '19 Release
Salesforce moved Salesforce for Outlook to "Maintenance Only Status" which reduced availability to existing users. Some of the functionality was affected as Lightning Experience ended its extended support for IE11.
(See article: https://help.salesforce.com/s/articleView?id=000388772&type=1)

Summer '21 Release
The Action Menu (such as New Event, New Task, New Contact, New Opportunity, New Case and New Lead) was retired. After the Action Menu was retired, the new records button was no longer available in the side panel. The application was also no longer visible in the Appexchange for new installations.

Summer '23 - Winter '24 Release
Salesforce sent email communication about the Salesforce for Outlook retirement and the planned migration.

Summer '24 Release
Salesforce for Outlook will be fully retired and users won't be able to use or install the application.

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Salesforce Native Alternatives: Outlook Integration, Einstein Activity Capture and Salesforce Inbox

Outlook Integration

Salesforce strongly recommends opting for the Outlook Integration. The Outlook Integration will provide the same functionality as the legacy Salesforce for Outlook, but there are some system requirements that need to be met before implementing the integration.

PROS: Free, and includes features similar to the legacy Salesforce for Outlook (Create Leads Contacts, Sync Emails and Create New Events)

CONS: Need to meet the System Requirements (such as Outlook Version for desktop and recent stable version for Web Application), Users need to manually install the Salesforce extension to their Outlook Platform, Manual syncing of the items to Salesforce is required

See: Outlook Integration Implementation Guide

Einstein Activity Capture

Salesforce's Einstein Activity Capture is another feature that can enhance the new Outlook Integration. Einstein Activity Capture helps sync your data (emails, events and contacts) from Outlook to Salesforce automatically.

PROS: Auto-syncing of the items based on the syncing settings configured

CONS: Additional license cost, Attachment Upload is not supported, Emails disappear from Salesforce after 6 months to 2 years, Reporting is pushed to Einstein Analytics

Salesforce Inbox

Another Salesforce native product which is good as an alternative to Salesforce for Outlook. Salesforce Inbox is a paid tool which expands additional features on top of the Outlook Integration such as pop-up Salesforce window when using outlook, email scheduling and creating shortcuts.

PROS: Read Receipts to Email, Users can send calendar availability, Create Records from Outlook

CONS: Additional license cost, Need Outlook Integration before using this feature, Logging of emails must be done manually

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Migration Plan

Salesforce stated migration plan for the users to perform before the complete Salesforce for outlook retirement. There are multiple alternatives for organizations transitioning from legacy integration.

Migration Plans and Definition

Migration Steps	Description
Explore and evaluate the latest Microsoft Integration Products	There are products that can replace Salesforce for Outlook (e.g Outlook Integration, Einstein Activity Capture, Salesforce Inbox and Third Party Application.) Assess the features, functionality, and compatibility of each option.
Study and verify if the Product meets Business requirements and Business Security Requirements	Carefully study what application you are going to recommend as a replacement for Salesforce for Outlook. Weigh in what features the business needs and also what is good for users in terms of their experience.
Plan for Data Migration	Create a data migration strategy to ensure all relevant data from Salesforce for Outlook is transferred to the new integration solution or application. Regardless if the data is saved in Salesforce or Outlook, always consider how the data will run once the new application is in place.
Start the Migration and Test Plan	Once you select what tool you are going to recommend, plan for the migration dates. Ensure that there is a test before deploying everything to production. Administrators should make note of all the changes that have been configured for quick turnaround in case something goes wrong.

References

Move from Salesforce for Outlook to the Next-Generation Products
https://help.salesforce.com/s/articleView?id=sf.outlookcrm_sfo_move_parent.htm&type=5

Salesforce for Outlook Retirement
https://help.salesforce.com/s/articleView?id=000393445&type=1

Outlook Integration Implementation Guide
https://resources.docs.salesforce.com/latest/latest/en-us/sfdc/pdf/sales_outlook_integration_impl_guide.pdf

Prepare for the Move to a Replacement Product
https://help.salesforce.com/s/articleView?id=sf.outlookcrm_sfo_move_replace_parent.htm&type=5

Salesforce for Outlook no longer connects for some customers working from Lightning Experience
https://help.salesforce.com/s/articleView?id=000388772&type=1

Einstein Activity Capture
https://help.salesforce.com/s/articleView?id=sf.einstein_sales_aac.htm&type=5