Future Ready Cloud Collaboration Workspace Project Notes

If you haven't migrated yet, and need to setup your Salesforce Add-in, continue to page 2.

Migration

The University of Nebraska system is making significant changes to Microsoft 365, for more information about this project, visit https://nebraska.edu/offices-policies/its/future-ready

During this migration, you could lose your current connection to the Salesforce Add-in within Outlook. If you have recently migrated, please review these notes to help resolve any issues you may experience.

Migration Notes

1.) Users have experienced varied results with the Salesforce add-in post-migration:

   A.) Everything works just as before, and no changes are necessary.

   B.) The Salesforce Add-in icon is no longer present in Outlook. Follow the steps with in this guide to reconnect Salesforce.

   C.) The Salesforce Add-in is still connected to your old unl.edu email address., and you receive the following error:
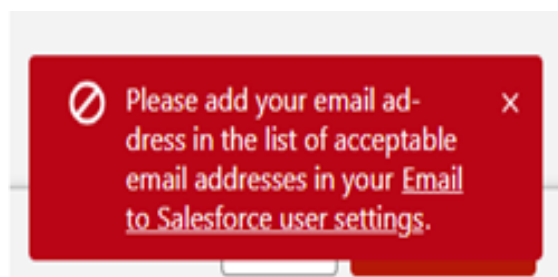

Follow the steps from **Logging from a Shared Email Address** on pages 10-11, but instead of entering the shared email address, enter your new Nebraska.edu email address.

If you experience any other issues, or need assistance, please submit a ticket to

https://services.unl.edu/salesforce-service-request
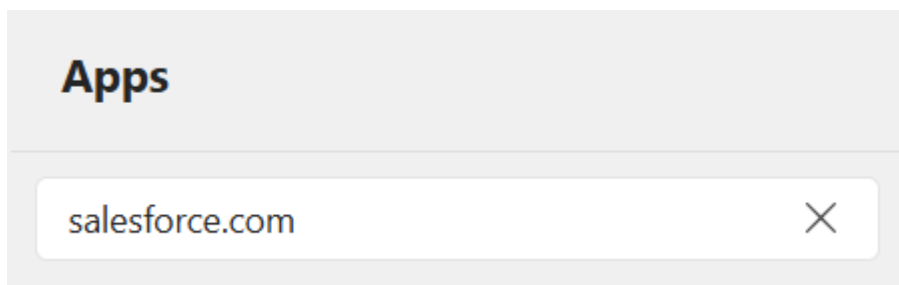
Logging in to Salesforce Plug-in in Outlook

1. Select the blue Salesforce cloud icon. In classic Outlook, the icon is located in the main ribbon in the Home tab view, but can move to the message window under certain view settings. In the new Outlook, the plug-in icon will always appear in the message window. Skip to Step 6.
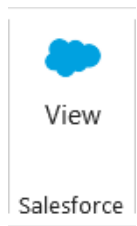
2. If you do not see the blue Salesforce cloud icon, you will need to install the add-in. On the left sidebar, select the Apps button, and select Add Apps
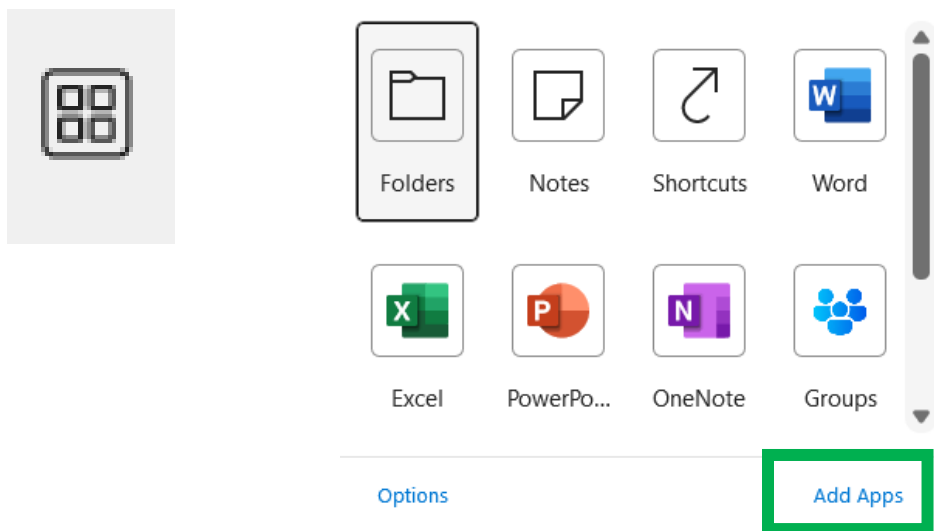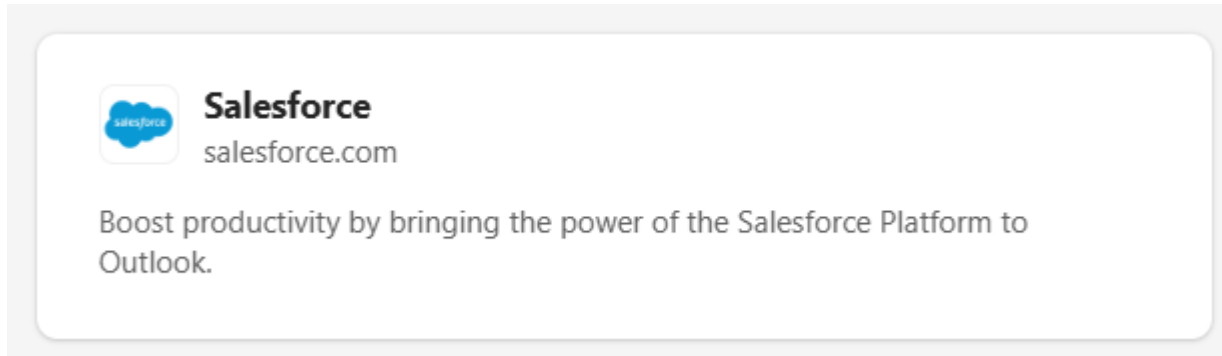

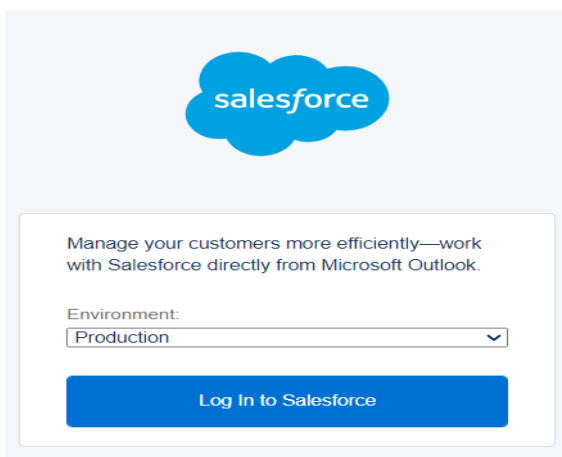3. In the Search bar, type Salesforce.com
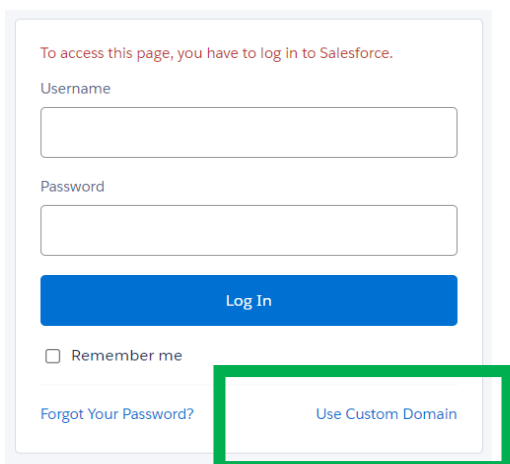
Logging in to Salesforce Plug-in in Outlook

4. The Salesforce all-in should be your first item. Select the tile, and then select Add. The add-in will now be available in the locations described in Step 1

5. A sidebar window will appear. Select Production environment and select Log In to Salesforce.

6. Select Custom Domain in the bottom right of the login window. Do not enter Username and Password here. Salesforce login needs to be routed through TrueYou authentication.

Logging in to Salesforce Plug-in in Outlook (cont.)

7. Enter "unlincoln" as the domain and select continue.

To go to your company's login page, enter the custom domain name.

Custom Domain

```
unlincoln
```

https://unlincoln.my.salesforce.com

| Back | Continue |

8. Select Log in with TrueYou and enter your TrueYou credentials.

Log In Using

Log in with TrueYou

Log In with a Different Account

9. After authenticating through TrueYou, select Confirm when prompted to connect your Salesforce and Microsoft email accounts

Connect your Salesforce account afrizzell2@unl.edu to your Microsoft email account afrizzell2@unl.edu. 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

10. You have connected your Salesforce plug-in to Outlook. You may have to repeat this process after an Outlook update. Until then, your Outlook will remained connected to Salesforce.

Using the Salesforce Plug-in in Outlook

The Salesforce plug-in allows you to attach Outlook emails to the student's advisee case record in Salesforce. It is critical to make sure you have selected the student's advisee case record during this process, otherwise the email will not be visible in Student Success Hub. Emails can be attached to Salesforce prior to sending, after they have been sent, or after they have been received.

Logging Received and Sent Emails

1. Select the blue Salesforce cloud icon. In classic Outlook using the Preview view setting, the icon is located in the main ribbon in the Home tab view.   If you utilize another view setting, you will have to open the email to see the Salesforce Outlook plug-in.   In the new Outlook, the plug-in icon will always appear in the message window
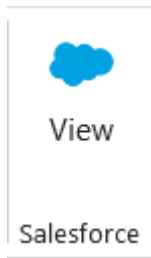
2. Salesforce will then bring up all records associated with the email addresses from the email. You must designate which record you want to use.   Select Pick Records to start this process. Selecting Log Now will associate the email with the wrong record, and it will not be visible in Student Success Hub.
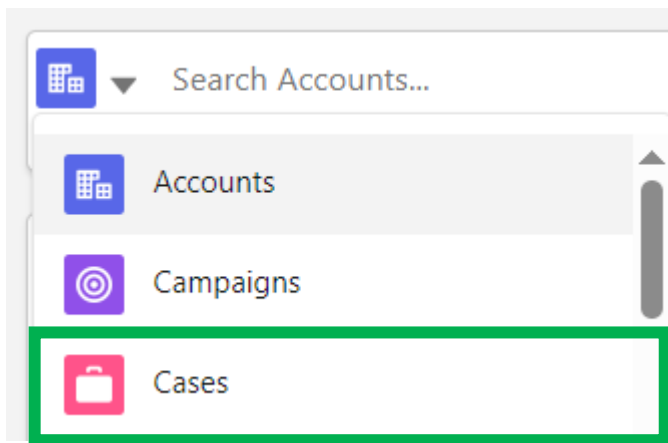
Using the Salesforce Plug-in in Outlook (cont.)

3. The first few times you use the Salesforce plug-in, the system will default to the Account record.
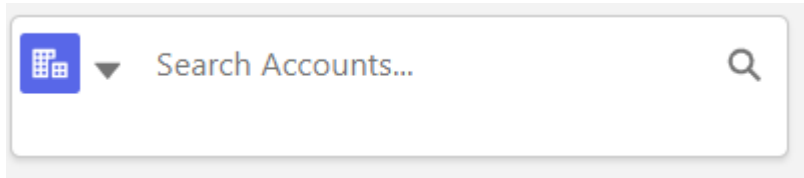
You will need to switch to search the Cases records by selecting the drop down around next to the building icon, and then select Cases with the briefcase icon.

Once you have switched to Cases, enter the student's NUID. This will reveal all Cases associated with a student. Students can have multiple cases due to a variety of factors, but they can only have one advisee case record. Scroll over until you see the Subject header, locate the record that contains Advisee Record at the end. Scroll back to the left, and select the case number that corresponds with the Advisee Record.

Using the Salesforce Plug-in in Outlook (cont.)

4. When you return to the Log Email screen, make sure that the radial in the Other section has the Advisee Case selected.

Other

Select one object to log the email to. Select None to log the email to only the selected people records.

⊘ None ○

🔲 Alan Frizzell Test Student Administrative Account ○
Account Record ...   Administrative

🗂 Alan Thomas Frizzell Jr Advisee Record 🔴
Status: Active Enrolled

Select "Unselect All" in the People section and uncheck the include attachments. This will help with saving data space in Salesforce.

People   Unselect All

> Include attachments (0/1)   ☐

Select Save at the bottom right, and the email will be logged to the student's advisee case record. It can be found by going to the student's case record in Student Success Hub, and selecting the Activity tab.
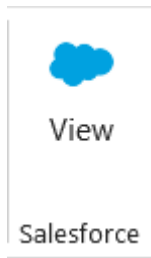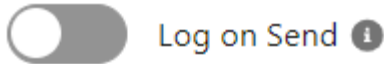
Notes   Quick Links   Activity

Using the Salesforce Plug-in in Outlook (cont.)

Logging Emails on Send

1. Select New Mail in Outlook, and then in the new email window select the Salesforce plug-in icon.

2. Once you write the recipients email address in the To section, Salesforce will prepopulate the associated records. Toggle the Log on Send button to be on.

Logging Emails on Send for Student Employees with Salesforce License

 If the student is also a student employee with a Salesforce license, this Log on Send button will not be able to be activated. You will need to skip to the next step and pick the advising case record of the student. Once that is complete, you can then toggle the Log on Send button to be on.

3. Follow steps 2-4 from the previous section to pick the student's advisee case record. Once you hit save, the email will not be associated to the student's advisee case record until you hit send on the email.

Using the Salesforce Plug-in in Outlook (cont.)

Alternate Search Method:

You can also use the global search at the top of the Salesforce Plug-in

1. Enter the NUID of the student in the Search field.

The results will display all records for the student. As the system learns you navigate to the Case record more frequently, it will begin to display these items first.

2. Once again, a student can have multiple case records in Salesforce, so you will need to select the Advisee Case Record.

3. This record can be identified with the Subject Field displaying the name of the student and Advisee record. If the name of the student, is long, you can also look for the term "Active Enrolled" as pictured in the first case on the right

4. Once you have located the Advisee Case Record, click on Case Number—8 digit number for that case.

5. Select Log in the top right and follow step 4 from previous Search method to finalize logging the email

Cases

2 Results • Sorted by Relevance

Cas...   00164057
Contact...   Test Student
Stu...   NUID
Subject: Test Student Advisee
Sta...   Active Enrolled
Date/Ti...   12/18/2023, 4:01 AM

Cas...   00162932
Contact...   Test Student
Stu...   NUID
Subject: Readmission email
S...   Closed
Date/Ti...   12/8/2023, 2:30 PM

Logging from a Shared Email Address

Shared Email Addresses

In order to save emails that are stored in a shared email address, you need to setup this email address as an Acceptable Email Address in your User settings.

1.) Navigate to your User settings by clicking your icon, and selecting the "Settings" link in the dropdown menu.
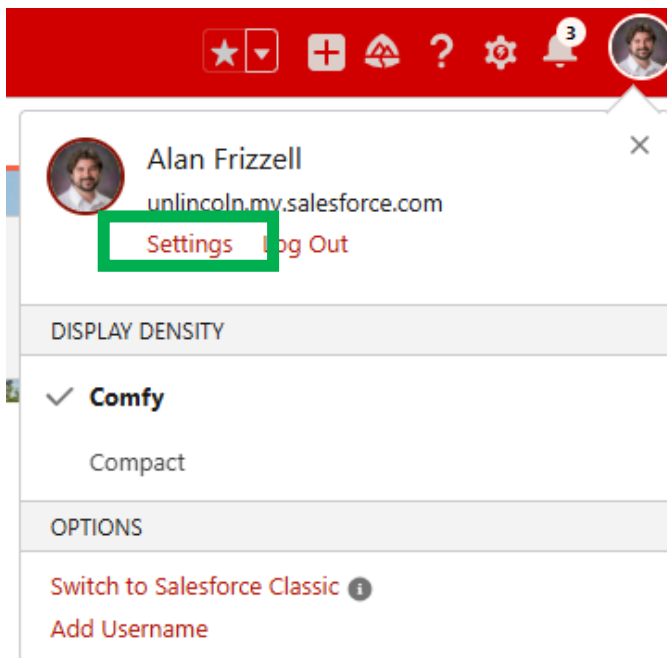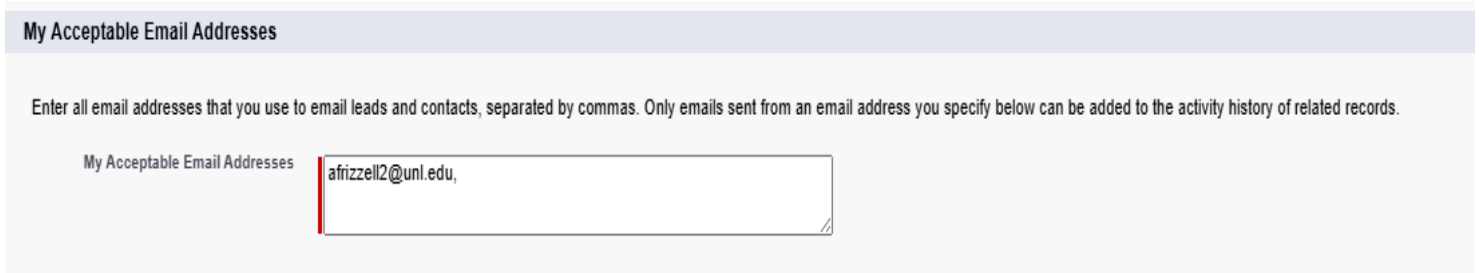

2.) On the left side on your screen, expand the Email section by clicking the carrot, and select My Email to Salesforce.
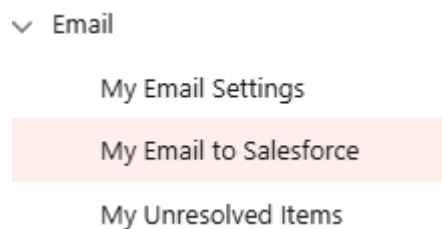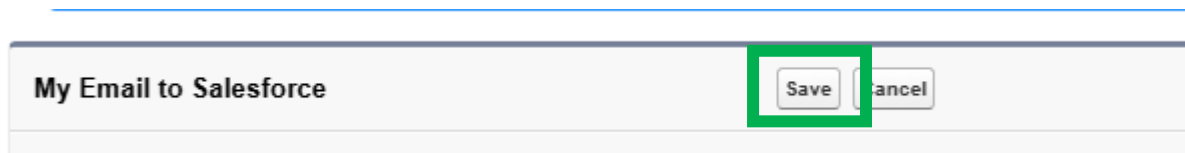
Logging from a Shared Email Address (cont.)

3.)   In the My Acceptable Email Addresses, add the shared email address, and use commas to separate the different email addresses.

4.) Select Save in order to update your settings.

5.) After completing these steps, if you still receive this error in Outlook, log out of Salesforce Add-in in Outlook and then log back in. To log out, open Outlook and activate the Salesforce add-in. Click on your picture icon in the window and select "Log Out". Use this document to log back in. If your shared email address is still not working, please submit a ticket.