Outreach

Salesforce Configuration

Table of Contents

Requirements

Minimum Requirements for Connection

Salesforce Pro Edition with REST API access or **Salesforce Enterprise Edition** (REST API included)

The individual who connects the plugin (the Outreach admin) must have the following permissions in Salesforce:

- Modify data (create, edit, delete) on required objects that need to be shown in Outreach
    - This includes Accounts, Contacts, Leads, Opportunities, User, User Role, and Tasks/Events. See page 7 for more details.
- View and modify permission on field level security settings
- Salesforce REST API access must be enabled under the user profile in the system permissions

Data that syncs between Outreach and Salesforce

Updating Records

Salesforce Syncing to Outreach (Polling)

New records & updates sync from Salesforce into Outreach depending on the interval you choose for your polling cycle. We recommend setting your interval at 10 minutes, meaning that Outreach will scan your Salesforce instance once every 10 minutes for new or changed records.

Outreach Syncing to Salesforce (Pushing)

Changes such as completed activities or field updates like an automatic stage change will push back to the corresponding record in Salesforce in near real-time (typically 15-45 seconds depending on the amount of data trying to sync back to your SFDC instance).

Creating Records

Creating Records From Salesforce Into Outreach (Inbound Create)

There are a few different ways to bring your new or existing records from Salesforce into Outreach

- Automatic SFDC Sync
- SFDC List View
- SFDC Report
- CSV

Create from Outreach to Salesforce (Outbound Create)

Creating leads/contacts in Outreach and pushing them up to Salesforce is also possible with Outbound Create settings. Outbound create will take a prospect in Outreach (that is not yet in Salesforce) and push it up to Salesforce as a newly created lead/contact.

Note: By default, Outreach prevents duplicate contacts from being created by allowing only one record per unique email address. If your sales process relies on using more than one record per email address, read about prospect remapping or reach out to support@outreach.io to discuss duplicate contact support.

SFDC Objects that sync with Outreach

Lead: We fully integrate with almost all aspects of the lead object, including statuses and associated activity.

Contact: We fully integrate with almost all aspects of contacts, including statuses and account assignment.

Account: Syncing accounts is great for organizing Contacts under their respective Accounts in Outreach. Current limitations exist around mapping to account status/stage.

Opportunity: Bringing Opportunities into Outreach lets you associate activity on a lead/contact in Outreach to the appropriate Opportunity.

Event: Meetings booked through Outreach Meetings that are associated to an Outreach prospect will sync to the corresponding Salesforce Lead/Contact.

Lead Status: Pull in any existing Salesforce Lead and Contact statuses so that Outreach prospects reflect the same status as your CRM.

User: Create Outreach seats for all individuals with Salesforce licenses so that even records that are owned by non-Outreach users are visible in Outreach.

User Role: Pull in User Roles assigned in Salesforce, including the role hierarchy.

Task: View all completed Outreach tasks in Salesforce for complete and thorough reporting

More: Have questions about anything we didn't list? We can provide consultations on your specific workflow. Contact support@outreach.io for more information.

API Call Usage

Inbound Syncing from Salesforce to Outreach (Bulk)

Automatic polling can detect up to 2,000 newly created/updated SFDC records in 1 API call. It can then import 200 of those records at a time per 1 API call (a Salesforce-side limit).

Example: If 2,000 new records are detected in 1 polling cycle, it will use 11 API calls to bring them in (1 for polling, 2,000/200 = 10 API calls for creation).

Outbound Syncing from Outreach to Salesforce (Real Time)

Outreach pushes all completed activities and record changes back to SFDC in real time (changes are usually seen in 30-45 seconds).

Activities Outreach can sync to Salesforce

Outreach can sync messages sent/received, logged calls, meetings booked, and other tasks.

Email Activity: Outreach can sync any inbound or outbound messages to prospects that exist in both Outreach and Salesforce. You can choose to only sync emails sent inside of Outreach (including the Gmail and Outlook extensions), or mail sent both inside and outside of the platform.

Phone Activity: When you log calls in Outreach, Outreach can push the call activity to the Activity object in Salesforce, along with custom fields including the call duration, disposition, and purpose.

Text messages: Text messages sent through Outreach that are associated with an Outreach prospect will sync as a task with the corresponding Salesforce Lead/Contact.

Meetings: Meetings booked through Outreach Meetings that are associated to an Outreach prospect will sync to the corresponding Salesforce Lead/Contact.

Generic Tasks: Tasks that are completed in Outreach and associated to a prospect will sync to the corresponding Salesforce Lead/Contact. This includes LinkedIn tasks.

**Please note, the Type object must be set to "Visible" in the Field Level Security Settings in Salesforce. Click to see an article on how to find this in your Salesforce account. You must be an admin to make these changes.*

Tasks

Completed activity can be logged in the Activity History section of the Lead/ Contact/ Opportunity in Salesforce.

Manual Tasks: A task that is assigned to a prospect manually, rather than through a sequence. This can be pushed to the activity section on a lead/contact in Salesforce.

Sequence Tasks: A task created by a step in a sequence. This can be pushed to the activity section on a lead/contact in Salesforce.

Tasks Types: Email, phone call, action item, LinkedIn actions, texting, generic tasks

Note: With the standard Salesforce setup, incomplete tasks in Outreach cannot be posted in Salesforce. If you're interested in including incomplete tasks, please reference the Advanced Task Mapping configuration documents.

Users & Ownership

Ensure ownership syncs on any records in Outreach and Salesforce

Users: All records in Outreach must be owned by a user that exists in Outreach and who has been mapped in the Salesforce plugin.

- Under the plugin settings you have the ability to automatically created an inactive user seat for individuals that own Salesforce records that do not have an Outreach seat. We'll go into detail on this setting later in this document.

Ownership: All current Outreach and Salesforce users must be created and mapped in the plugin to ensure ownership syncs from Outreach to Salesforce and vice versa.

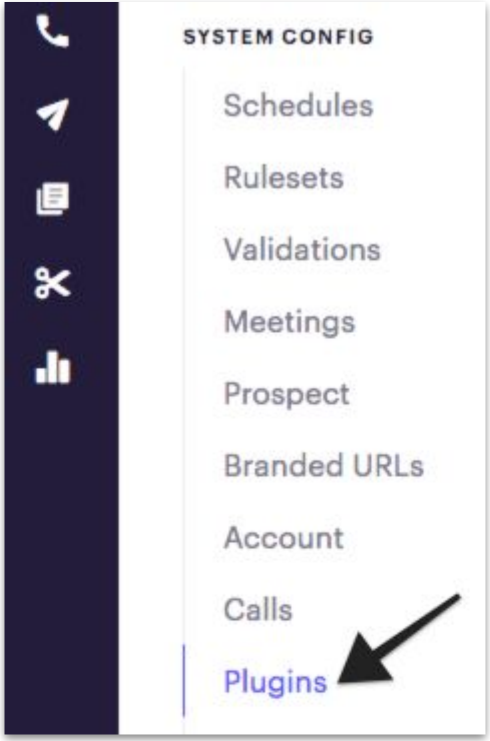
- Users can choose to map ownership one way or bidirectionally based on their preference for how data should be updated when using Outreach.
- If your team uses lead queues to assign ownership, please email support@outreach.io to set up the queues correctly.

Connecting Outreach to Salesforce

Authorize the Connection

1. On the bottom left hand corner of the Outreach platform, click on the initials and select "Settings"
2. On the Settings panel, find the section labeled "System Config" and select "Plugins".
3. On the top right hand side of the page, click on the "Add" button and select "Salesforce" or “Salesforce Sandbox” from the dropdown menu.
4. A pop up box will appear asking for your Salesforce login. Make sure you use a Salesforce Admin's login credentials to connect the Salesforce/Sandbox.

Check out our support documentation for more detail



Navigation

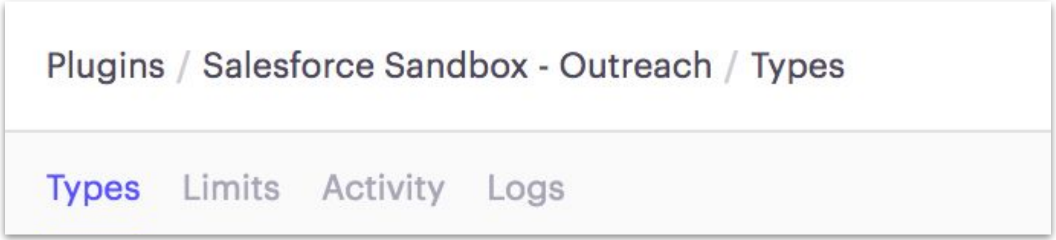
The Salesforce plugin menu consists of 4 tabs:

1. **Types**: Where you configure the object sync (Leads, Contacts, Accounts, Meetings, Opportunities, etc.). Most of the integration will be done in this tab.

2. **Limits**: Set API call limits. The global API call usage limit limits API calls used by **all apps** connected to Salesforce that require API calls. The Outreach-specific API call usage determines how many API calls can be used **specifically by Outreach**.

3. **Activity**: Displays action that has been initiated and synced to or from Outreach

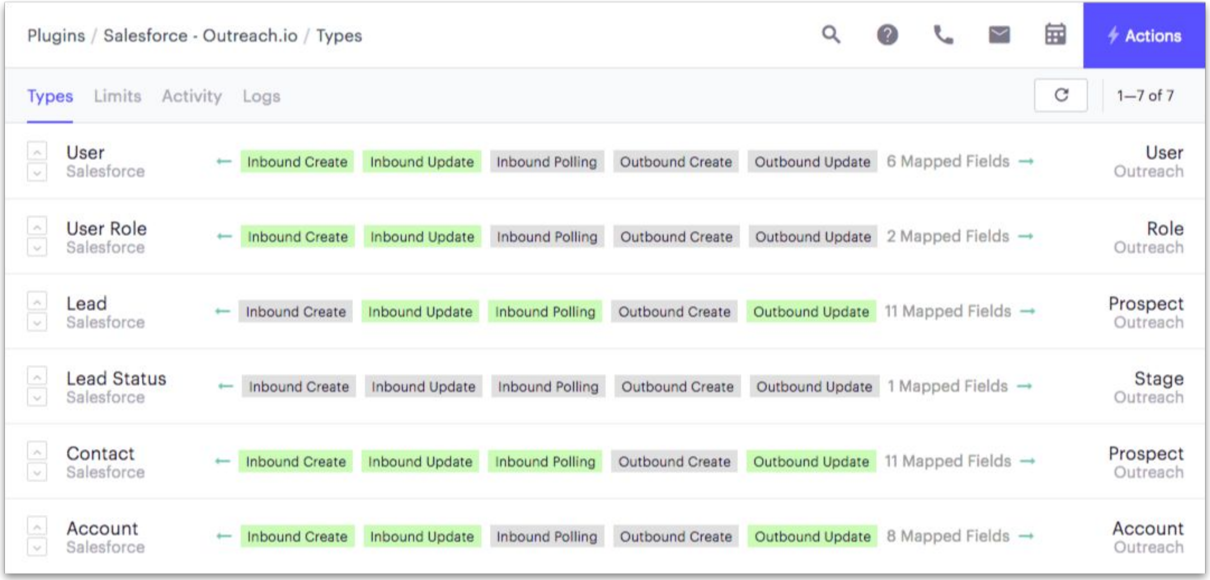
4. **Logs**: An In-depth technical overview of user and sync activity.



Types Tab

Configure data flow in and out of Outreach

Most of the integration will be done in the Types tab, configuring your Salesforce objects to sync with Outreach



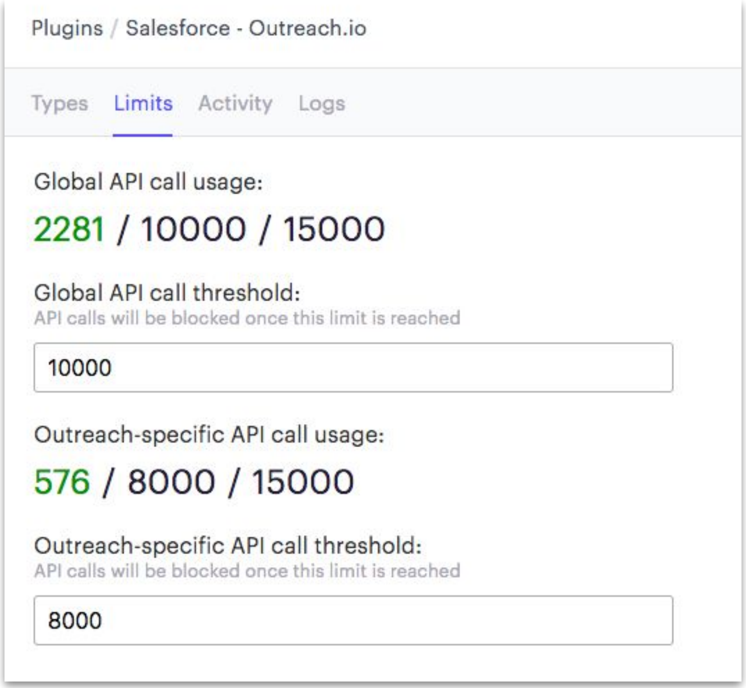
Learn more about configuring the Salesforce plugin here.

Limits Tab

Set the plugin to ensure Outreach never puts you over your daily API call limit.

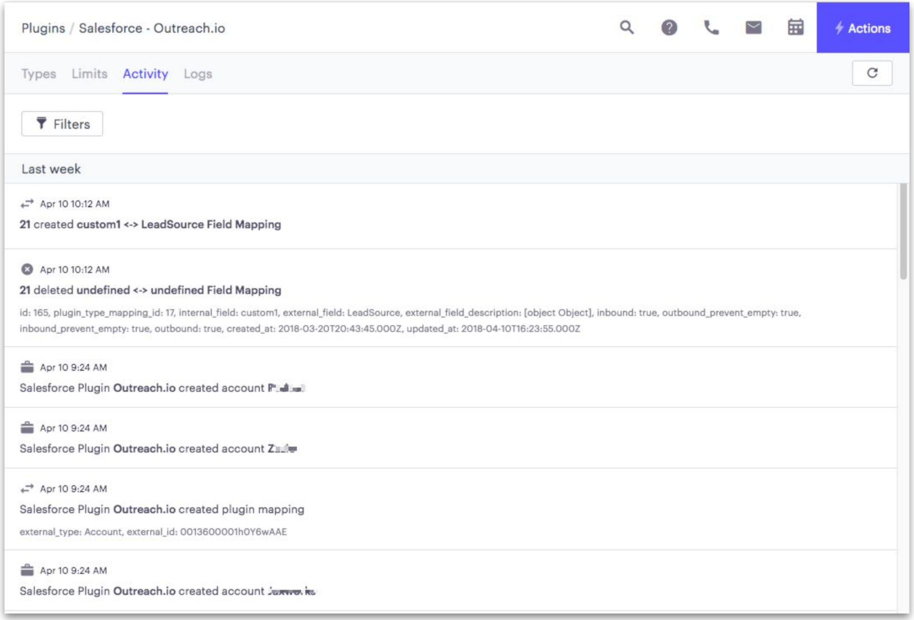
- **Global**: The global API call usage limit limits API calls used by **all apps** connected to Salesforce that require API calls.
- **Outreach-specific:** The number of API calls Outreach can make each day

API calls will be **preserved when the limit is hit, but will automatically retry once the API calls are below the set threshold.*



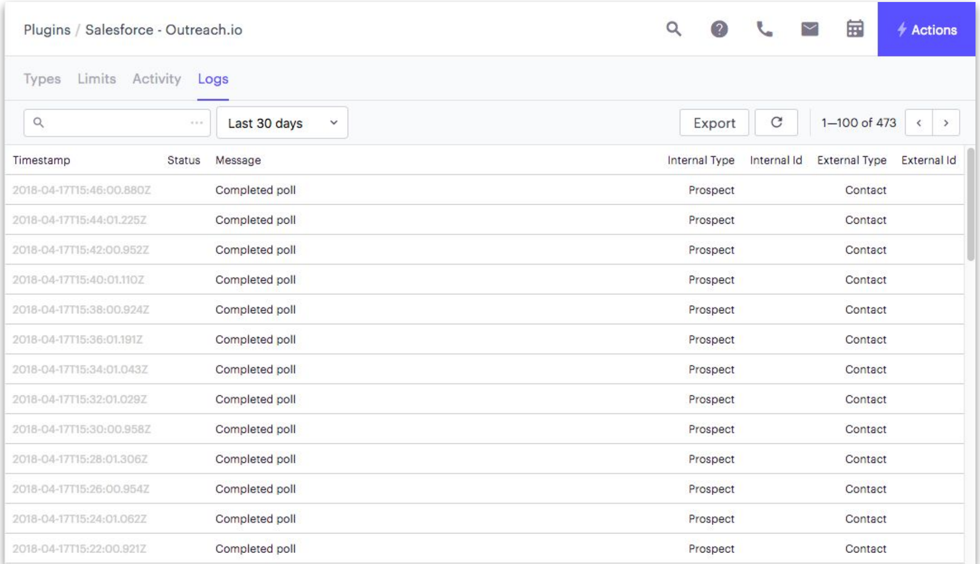
Activity and Logs Tabs

Activity History



Shows each action that has been initiated and synced to or from Outreach.

Technical Action Log



In-depth technical overview of user and sync activity

How to Sync Data between Outreach and Salesforce

Object Sync Settings Overview

Outreach syncs objects through two mechanisms: Polling and Pushing data

Polling is when Outreach *only* scans your Salesforce instance for any newly created or changed records and brings the updates into Outreach so both data sets match. Specifically, we look for a change in the System Mod Stamp.

Pushing is when Outreach *only* scans your Outreach account for any newly created or changed records that do not yet exist on the corresponding Salesforce object and pushes those changes to the corresponding Salesforce record so both data sets match.

Conflict Resolution: We built an intelligent Conflict Resolution layer to our SFDC sync to mitigate discrepancies in data from simultaneous updates in Outreach and Salesforce.

- *For example, if your team is executing a task on a Lead in Outreach at the exact same time a SFDC admin is updating a field on that same lead in Salesforce, most tools would encounter a row lock, or worse, one tool prioritizing their data over the other. With Outreach, we'll scan the lead field by field, to look for updates and apply/update accordingly.*

Configuring Objects: Toggles

Understanding Toggles

What are the toggles under each object type?

When you click into any of the object time, you'll see a page full of different toggles. These toggles give Salesforce and Outreach permission to take action on different events.

On the next page, we will go over each option to understand what enabling or disabling the toggle will mean for the sync between Outreach and Salesforce.

Questions to ask when configuring objects

Polling and Inbound Create/Update

Polling: Do you want Outreach to automatically look for new or updated information on Salesforce leads/ contacts/ accounts/ opps/ event?

If Yes - Polling on

If No - Polling off

Polling Frequency: How frequently should Outreach look for new or updated records in Salesforce?

Recommended best practice: 10 minutes

Inbound Create: Do you want Salesforce leads/ contacts/ accounts/ opps to be created in Outreach?

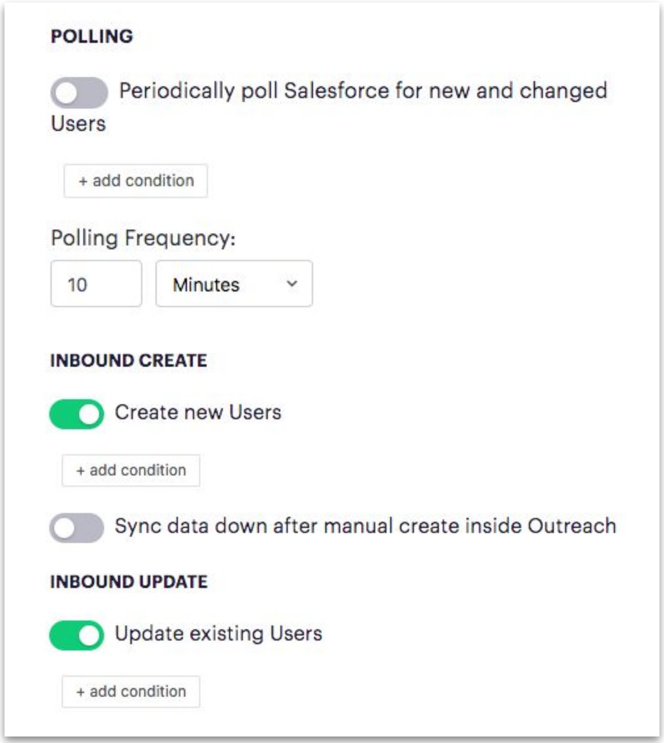
If Yes - Inbound Create on

If No - Inbound Create off

Inbound Update: Do you want Salesforce updates on the lead/contact/account/opp to reflect in Outreach?

If Yes - Inbound Update on

If No - Inbound Update off



Questions to ask when configuring objects

Pushing and Outbound Create/Update

Pushing: Do you want new or updated leads/ contacts/ accounts/ opps/activities in Outreach to post to Salesforce?

If Yes - Pushing on

If No - Pushing off

Outbound Create: Do you want new prospects/events to create a corresponding record in Salesforce?

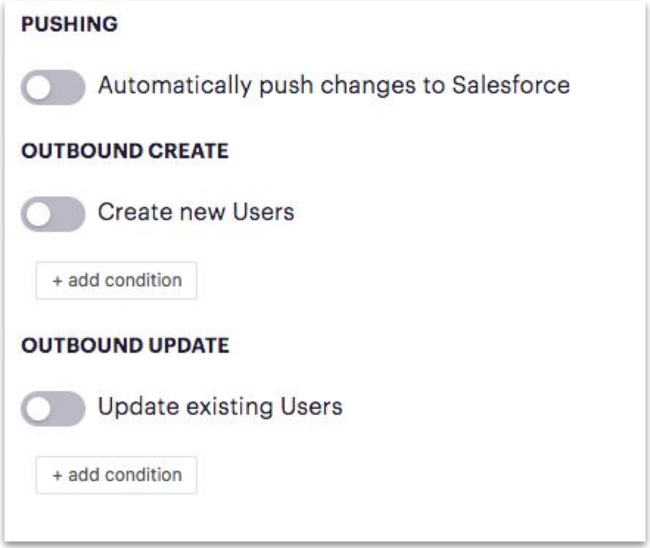
If Yes - Outbound Create on

If No - Outbound Create off

Outbound Update: Do you want updates made in Outreach to reflect on the corresponding record in Salesforce.

If Yes - Outbound Update on

If No - Outbound Update off

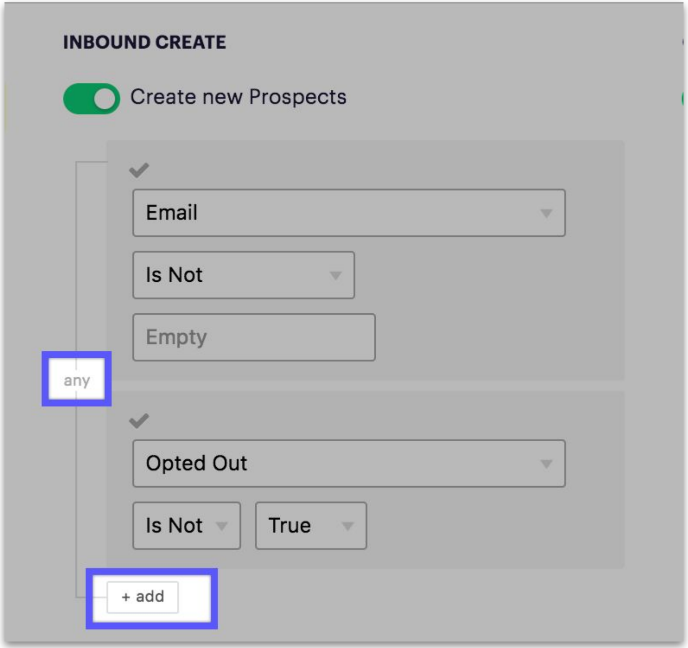


Note Outbound create is ***not* recommended for Accounts and Opportunities to preserve data integrity and existing SFDC validation rules.*

Adding Conditions

Conditions set criteria for when the sync should apply.

- When you enable the settings for each object in the plugin, you'll see an option to add a condition.
    - Example: I want Salesforce leads to be created as prospects in Outreach only when the prospect has an email address AND/OR they have not already opted out.
- You can add multiple conditions to any of the toggles.
- You can also change whether the condition should be an AND or an OR statement by clicking on the grouping text.



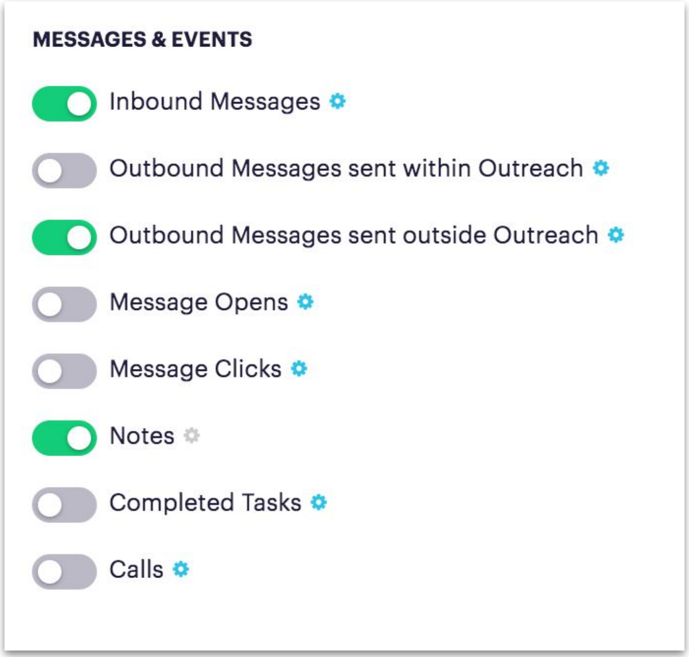
Messages & Events

Messages and Events tell the Outreach<>SFDC plug in what activity should sync to Outreach.

In some objects you'll also see toggles related to messages and events.

Clicking on the gear icon lets you customize the title of the activity that is synced to Salesforce. Customized options will highlight the gear blue.

Best Practice: Disable message opens and clicks to save API calls and keep your activity history clean. Opens and clicks will still be tracked in Outreach.



Objects and Activities Explained

User Sync

We recommend the following settings for the User object sync:

- **Inbound Create enabled** - Allows Outreach to sync in records for Salesforce users that own leads/ contacts/ accounts/ opps but do not have an Outreach seat.

- **Inbound Update enabled** - Allows Outreach to update the Salesforce user if it is adjusted in Salesforce

No further action is required on the User Sync object.

User Role

The User Role object let's Outreach pull in User Roles assigned in Salesforce, including the role hierarchy.

We recommend the following setting for the User Role object sync:

- **Inbound Update enabled** - Allows Outreach to update the Salesforce user role if it is adjusted in Salesforce

No further action is required on the User Role Sync object.

Syncing Leads between Salesforce & Outreach

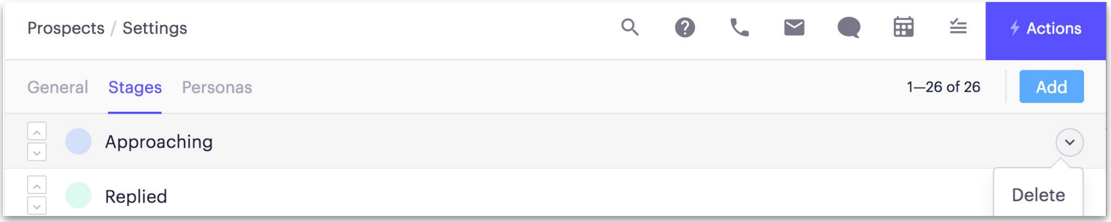
What you enable on the lead object in the Salesforce plugin is dependant on your workflow.

Does your team work with leads?

- If not, you can move to the next page and continue setting up Outreach.
- If they do, head back to page 23, where there are a few questions you can ask yourself to determine which settings to enable.

Lead and Contact* Stages

Before configuring your lead or contact stages in the Salesforce plugin, you'll need to make a few adjustments in Outreach.



Click on the initials on the bottom left hand corner of Outreach. On the settings panel, find the section labeled "System Config" and select "Prospects".

On the top of the page click into "Stages". You'll see a list of boiler plate stage names. You can remove these stages by clicking on the dropdown arrow on the right side of the stage name.

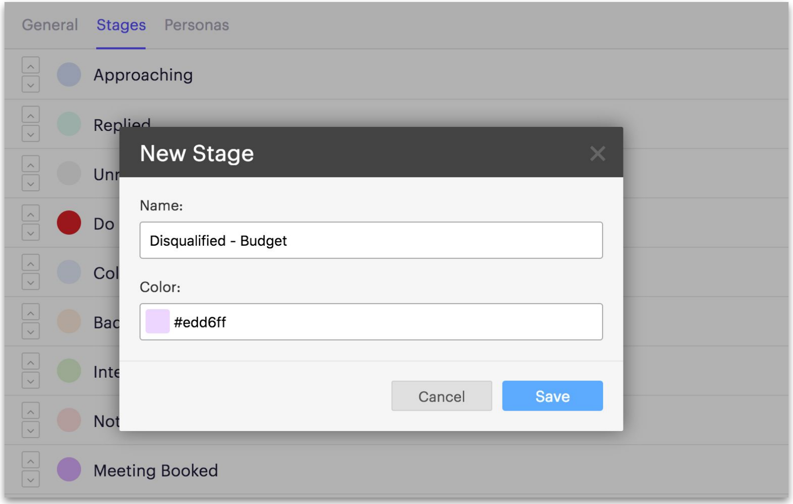
If applicable

Lead and Contact Stages Continued

- Add your Lead and Contact Stages by clicking on the “Add” button on the top right-hand side of the page.

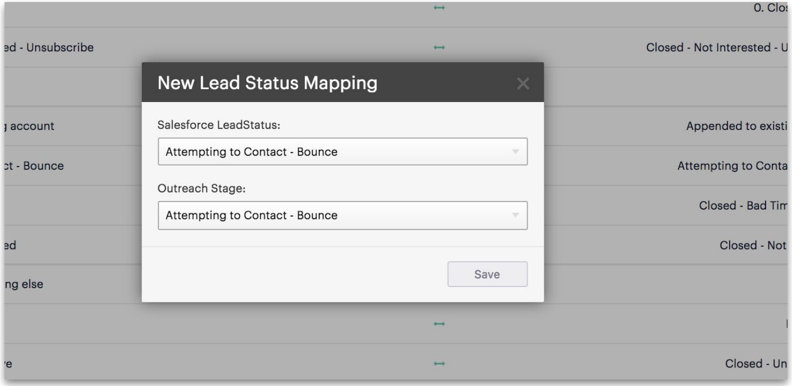
  The stage name should be verbatim to what appears in Salesforce, including spacing and capitalization.

- You can also select a color for the stage to more easily identify prospect stages in the Outreach platform.



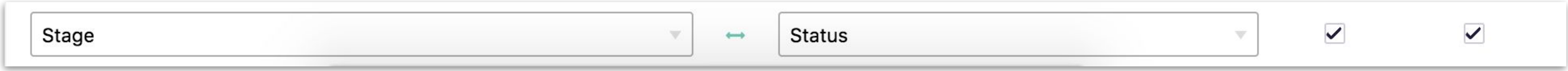
Lead and Contact Stages Continued

- Head back to the plugin and click into the lead status object.
- On the top of the page, click on “Mappings”.
- Click “Add” on the top right-hand side of the page.
- Search for a Salesforce Mapping and match it to the corresponding Outreach stage that you just added.
- Continue to add stage mappings until you’ve mapped all Lead **and** Contact Stages.



Lead and Contact Stages Continued

- Click into the **lead** object and on the top of the page select “Fields”.
- Click “Add” on the top right corner of the page.
- Under the left column (Outreach Prospect Field), find the field labeled “**Stage**” and map it to “**Status**” on the right column (Salesforce Lead Field).
- Check both checkboxes to sync the Lead stage between Outreach and Salesforce.



Lead and Contact Stages Continued

- Click into the **contact** object and on the top of the page select “Fields”.
- Click “Add” on the top right corner of the page.
- Under the left column (Outreach Prospect Field), find the field labeled “**Stage Name**” and map it to “**Contact Status**” on the right column (Salesforce Contact Field).
- Check both checkboxes to sync the Lead stage between Outreach and Salesforce.

Meetings

Syncing Meeting data from Outreach to Salesforce

Syncing to Salesforce: Sync settings and fields can be updated through the Salesforce Plugin by an Outreach admin.

Duplicate Meetings: We prevent duplicates in Salesforce by searching for an event where the owner (assignee), subject, start & end time match. When there is a match, the meeting will not be synced to Salesforce.

Sync with Opportunities: Add an additional field to the Calendar Events object (Opportunity <-> Related to ID).

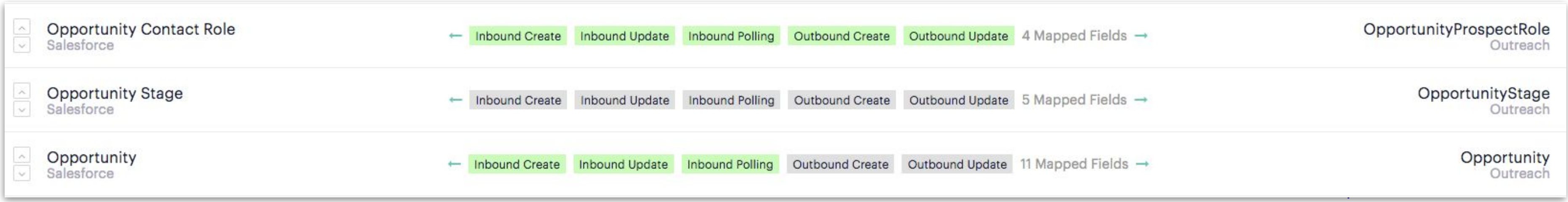
Learn more about syncing meetings in our support documentation.

Opportunities

Syncing opportunity data from Salesforce to Outreach

Syncing from Salesforce: Sync settings and fields can be updated by an Outreach admin. In the current phase of Opportunities, sync is inbound only with the exception of Opportunity Contact Roles which sync bi-directionally.

Fallback to associate activity toggle: If enabled on your contact and event objects, you will need to disable this toggle after setting up Opportunities.



Engagement Panels

What are Engagement Panels?

The Salesforce Engagement Panel enables you to build Outreach reporting and dashboards in Salesforce for better visibility into your team's performance.

Sequence information that can push to Salesforce:

- Current Sequence ID
- Current Sequence Name
- Current Sequence Status
  - Examples: Pending, Paused, Paused OOTO, Failed, Opted Out
- Current Sequence Step Number
- Current Sequence Task Due Date
- Current Sequence Step Type
  - Examples: auto_email, manual_email, call, task
- Actively Being Sequenced
  - True/False value
- Current Sequence User SFDC ID

Setting up the Engagement Panel

How to map fields in Outreach to the SFDC Engagement Panel

- Add new Type fields to the Lead/Contact Layout in SFDC with the correct field level security settings.
- Update the Outreach plugin settings to map the engagement fields to the correct fields in SFDC under the contact object, lead object, or both.

Name of Currently Active Sequence	⟷	Name of Currently Active Sequence	✓
Current Sequence Status	⟷	Current Sequence Status	✓
Current Sequence User SFDC Id	⟷	Current Sequence Step Actor	✓
Current Sequence Step No.	⟷	Current Sequence Step Number	✓
Current Sequence Task Due Date	⟷	Current Sequence Step Due	✓
Current Sequence Step Type	⟷	Current Sequence Step Type	✓

For more best practices and to connect with other Outreach Power Users, join our customer community **The Peak**!

Contact support@outreach.io to claim your seat.

Questions?

The Outreach Support team has your back!

Contact us:

https://support.outreach.io

support@outreach.io