Getting Started with SalesForce CRM

SalesForce Integration with MS-Office(Dynamo office)

Description:

BISP is committed to provide BEST learning material to the beginners and advance learners. In the same series, we have prepared a complete end-to end Hands-on Beginner's Guide for SalesForce. The document focuses on Salesforce Dynamo Office installation, configuration and MS-Office integration.Join our professional training program and learn from experts.

History:

Version	Description Change	Author	Publish Date
0.1	Initial Draft	Chandra Prakash Sharma	10th Nov 2013
0.1	Review#1	Amt Sharma	12th Nov 2013

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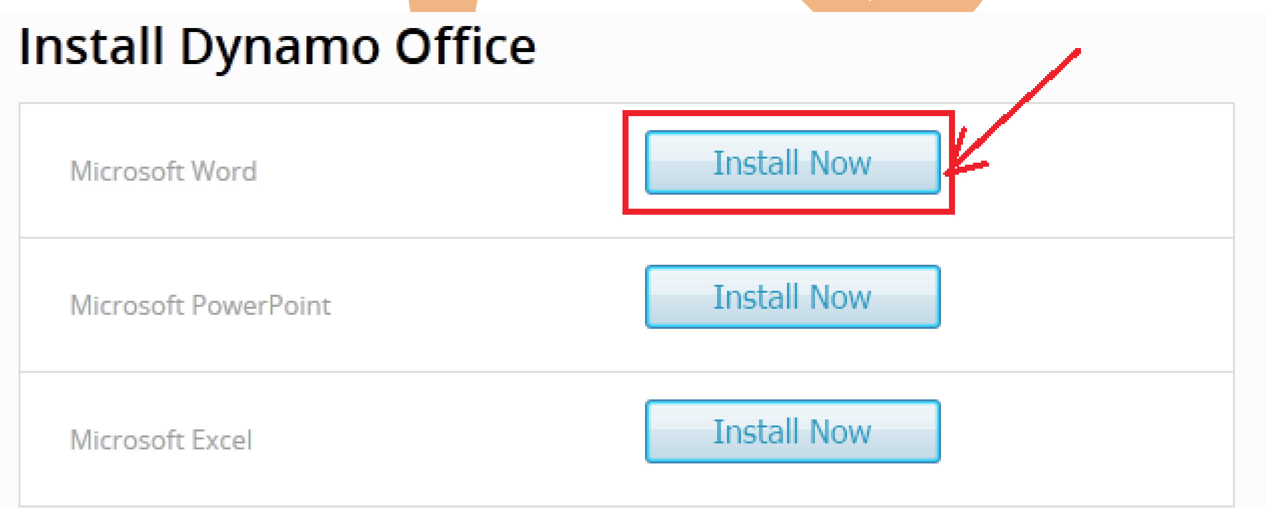
SalesForce Integration with MS-Office

To make users more productive SalesForce is tightly integrated with popular Microsoft applications including Word, Excel, PowerPoint and Outlook. Salesforce.com provides a convenient hosted application service. However, back-end reporting and integration with in-house applications is not possible without sophisticated Appexchange API programming.

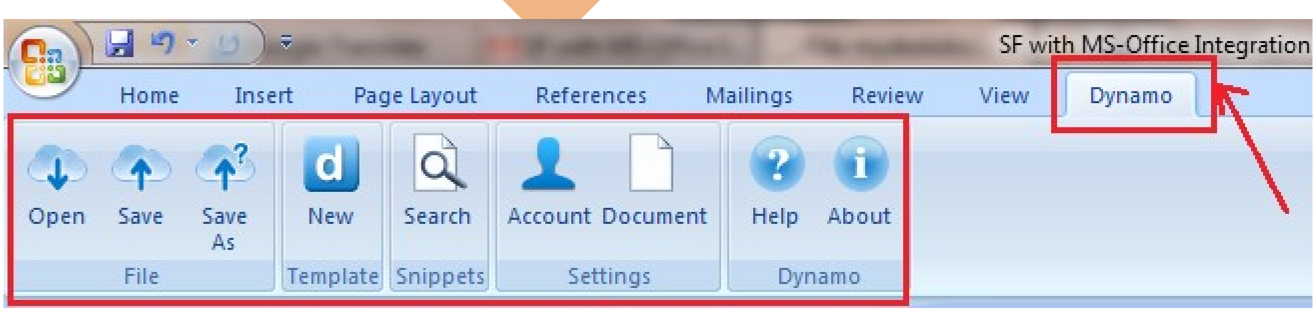
How To Integration with MS-Office :

Go to Appexchange web site and download Dynamo office given below site.
https://appexchange.salesforce.com/results?keywords=office
you can also use directly Dynamo web site below given link.
http://www.dynamoapps.net/office/install.htmls
On this two more option for ms-Power point or Microsoft Excel .
just go given link and click on Microsoft word Install Now button.



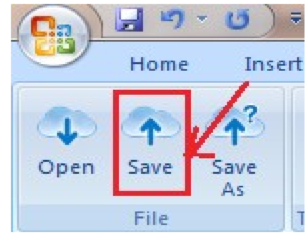
Once download setup is complete, After then install on your machine.
Note : Make sure before install Dynamo setup, install Ms-Office setup in your Machine .

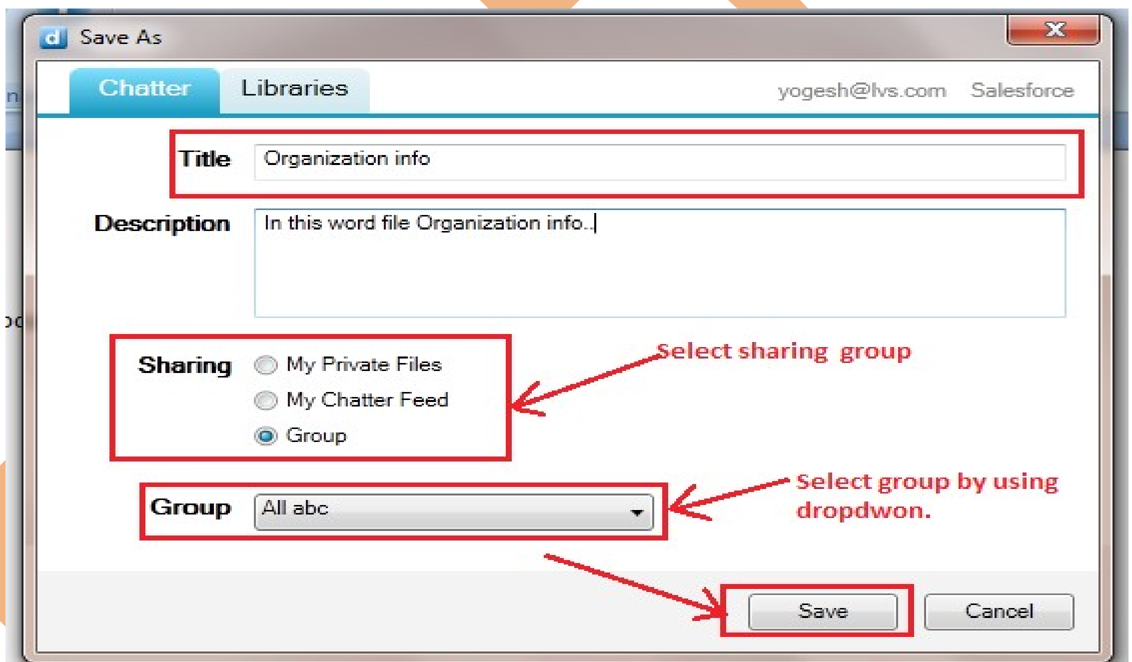
After Complete installation Dynamo setup in your machine after that open Ms-Office you can find there one tab Dynamo for connecting SalesForce. see below.



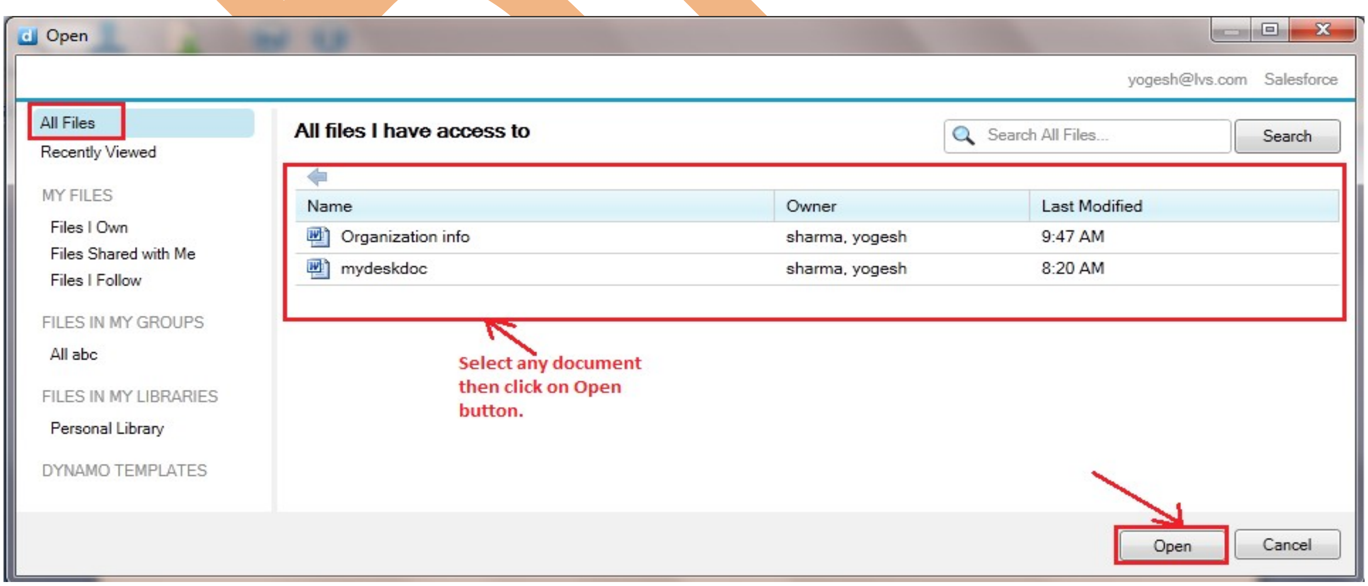
After open Ms-Office then click on **Dynamo** tab there are many option create New template, Open file, Save file , Save As file, search file, You can see account information, See Documentation information, help .
Perform any operation firstly login with SalesForce mail id or password.

Write anything in Ms-word document according your need and click on



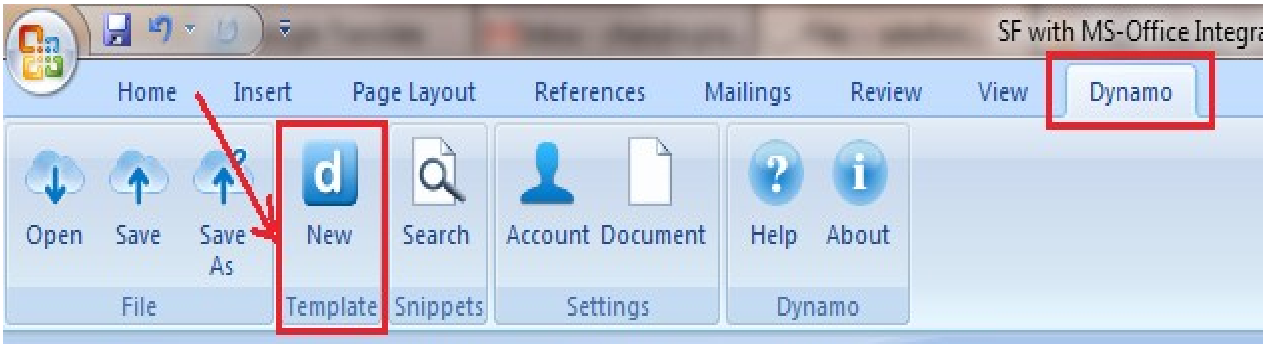


You can also Open these Document file by using Dynamo. Click on **Open** tab .

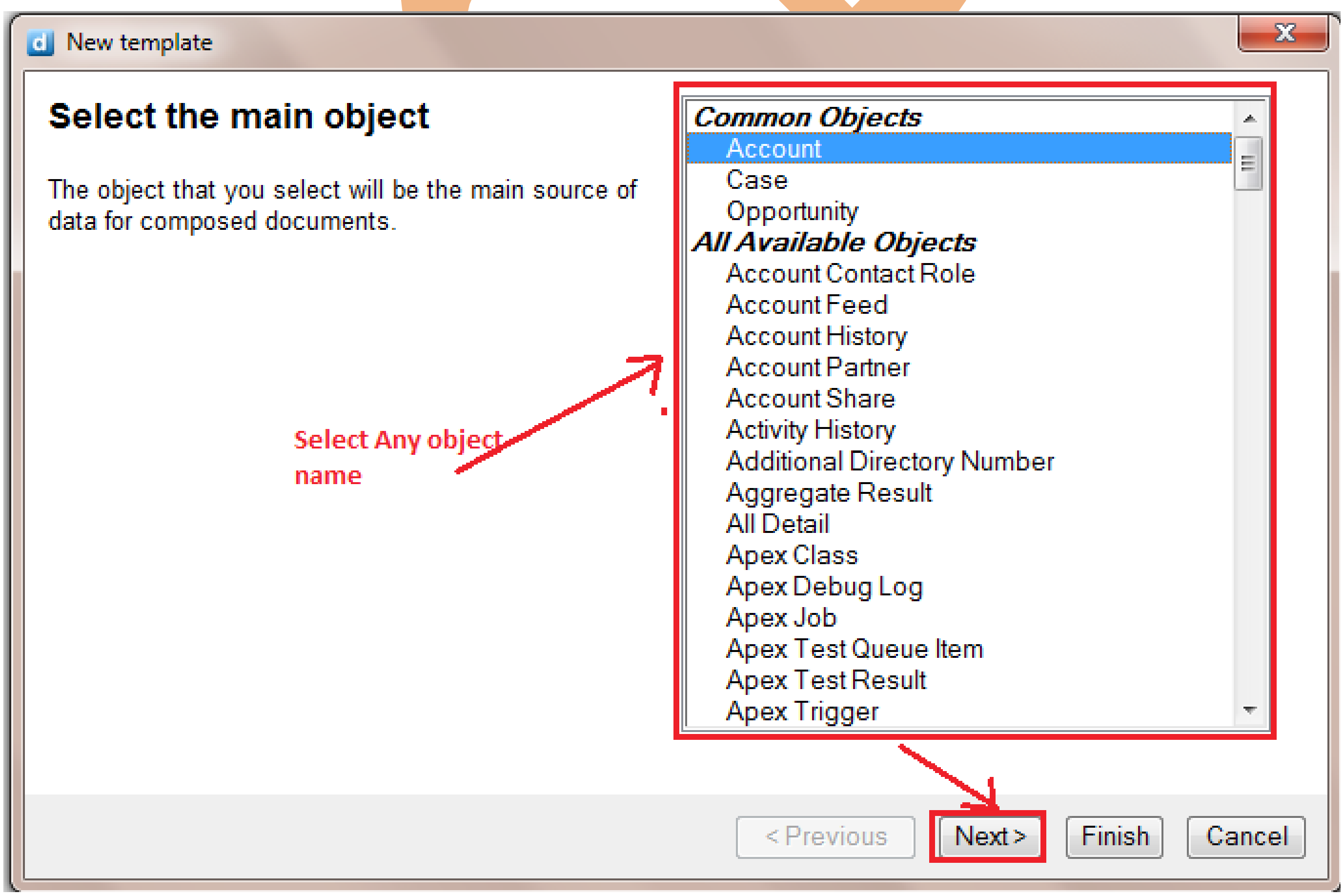


How to Add New Template :

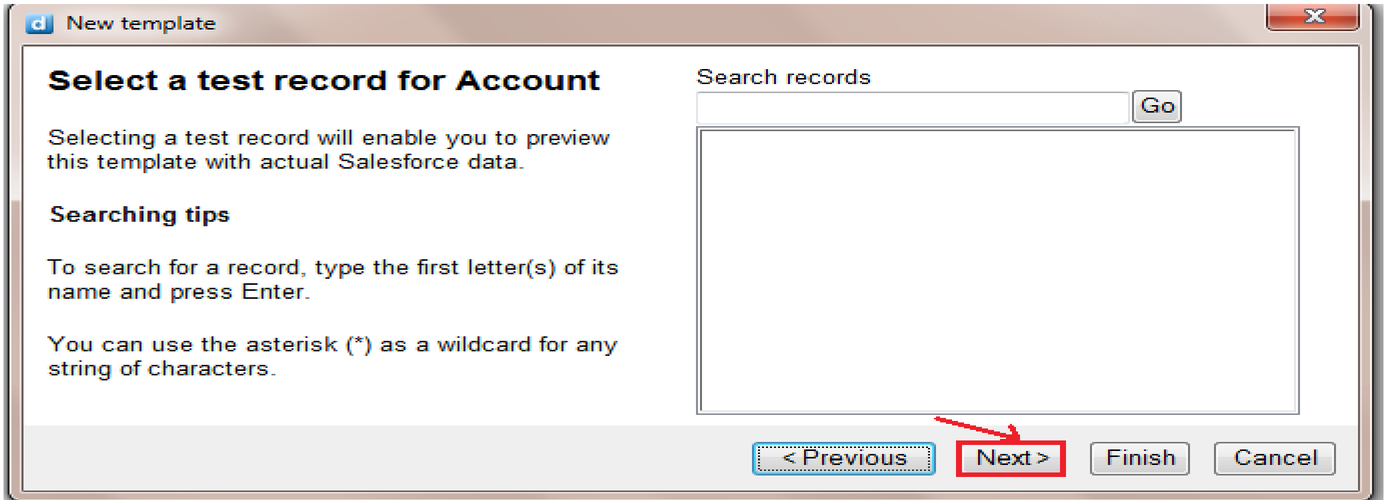
Click on Add Tab in Dynamo using Ms-office. see below.



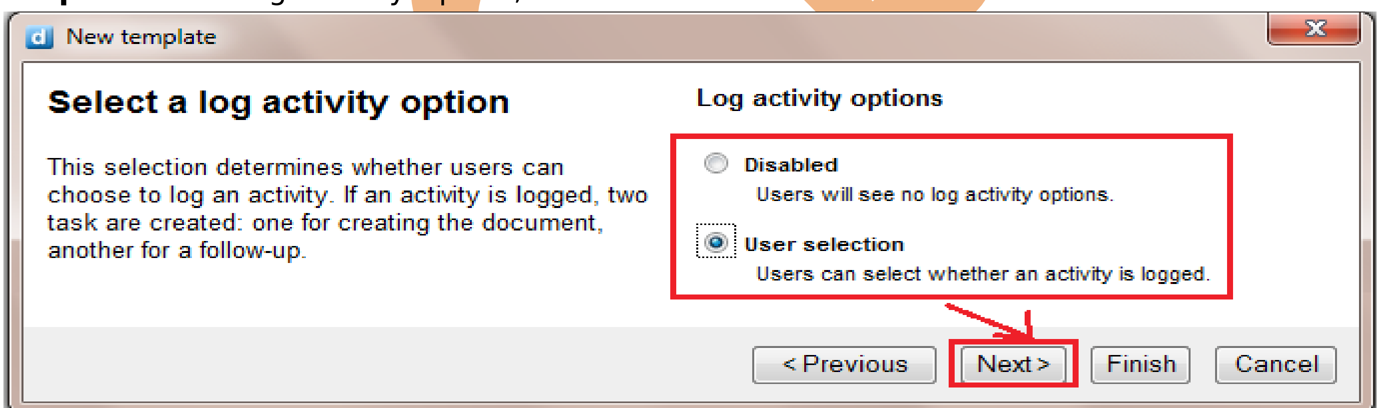
Step 1 : Select Object name there is all object available. then click on **Next** button.



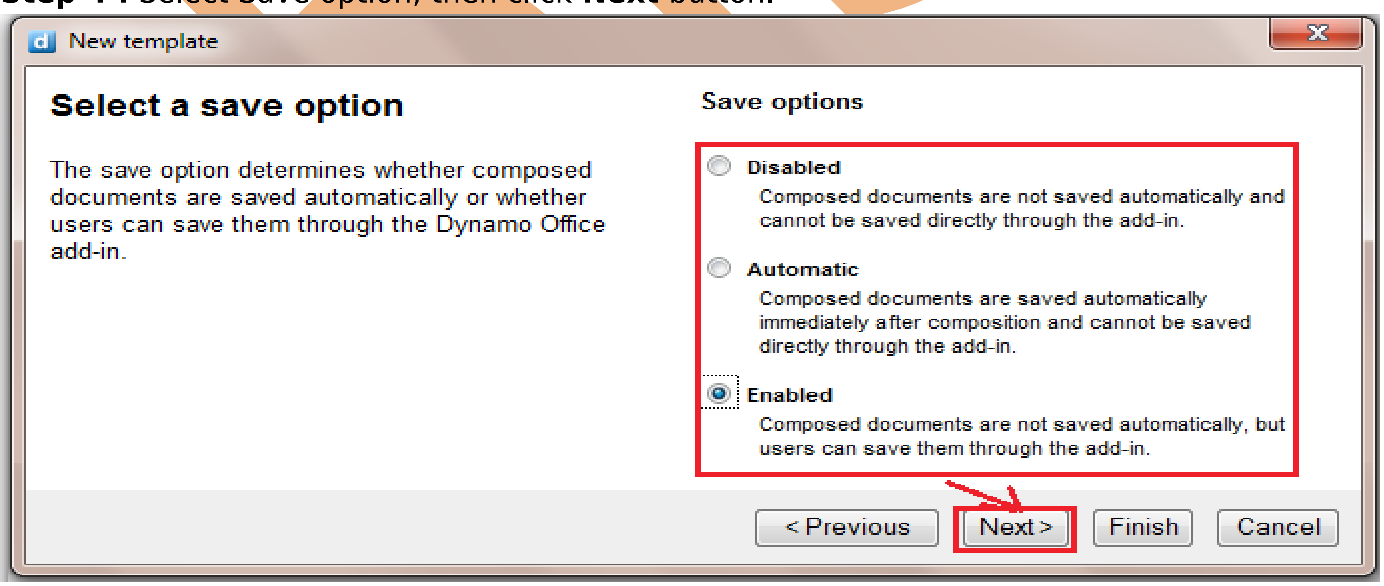
Step 2 : Select a test record for Account, if there is no click on Next button.



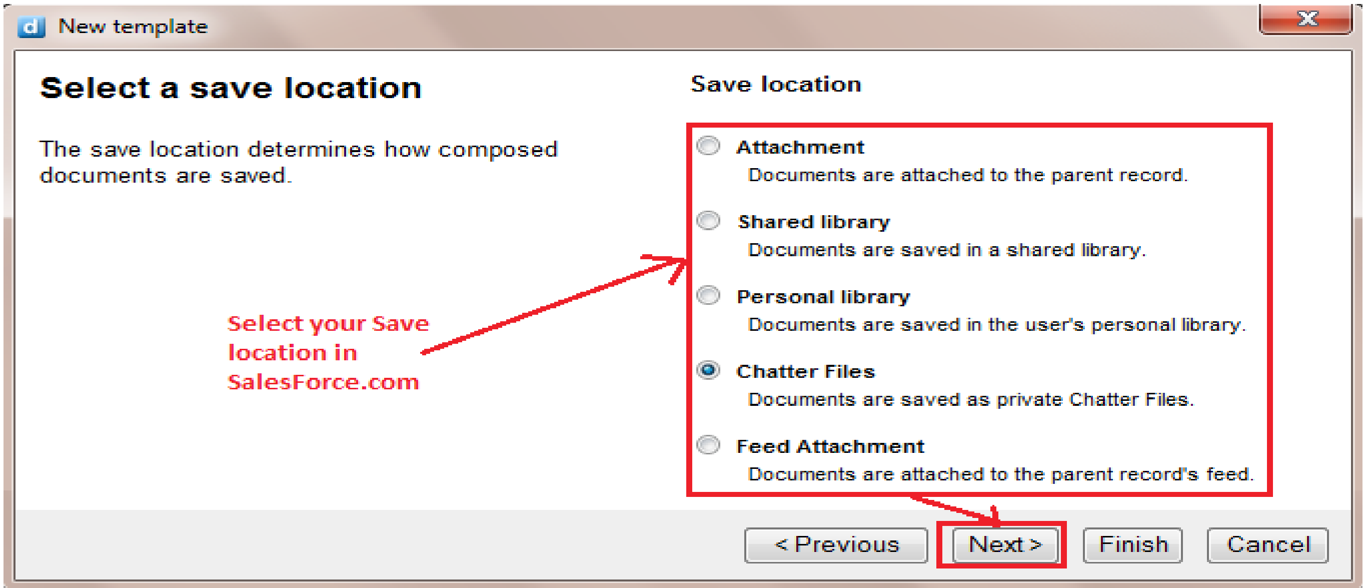
Step 3 : Select log Activity Option, Then Click on **Next** button.



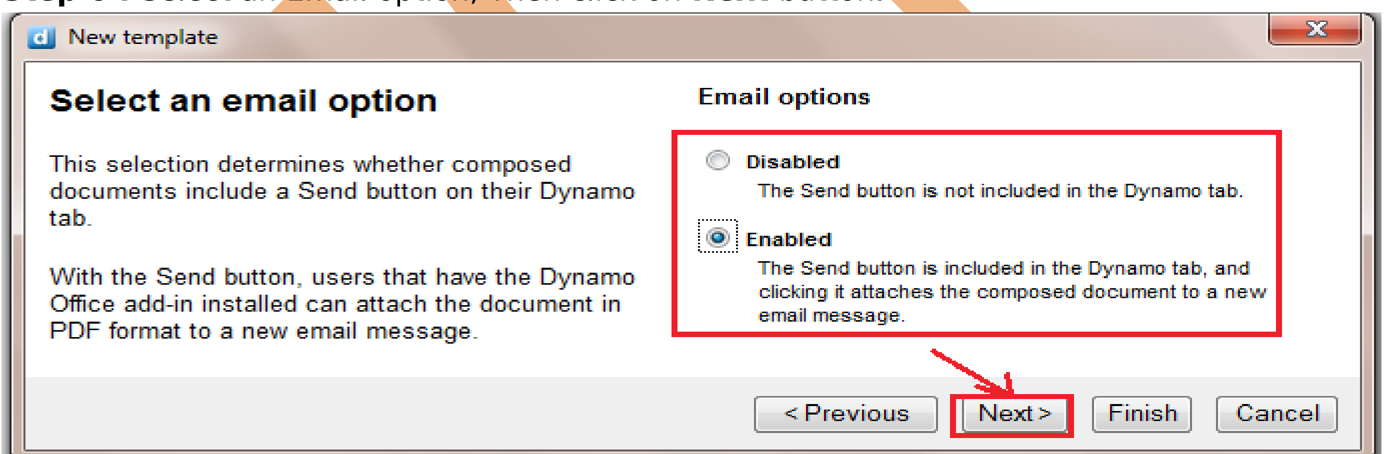
Step 4 : Select Save option, then click **Next** button.



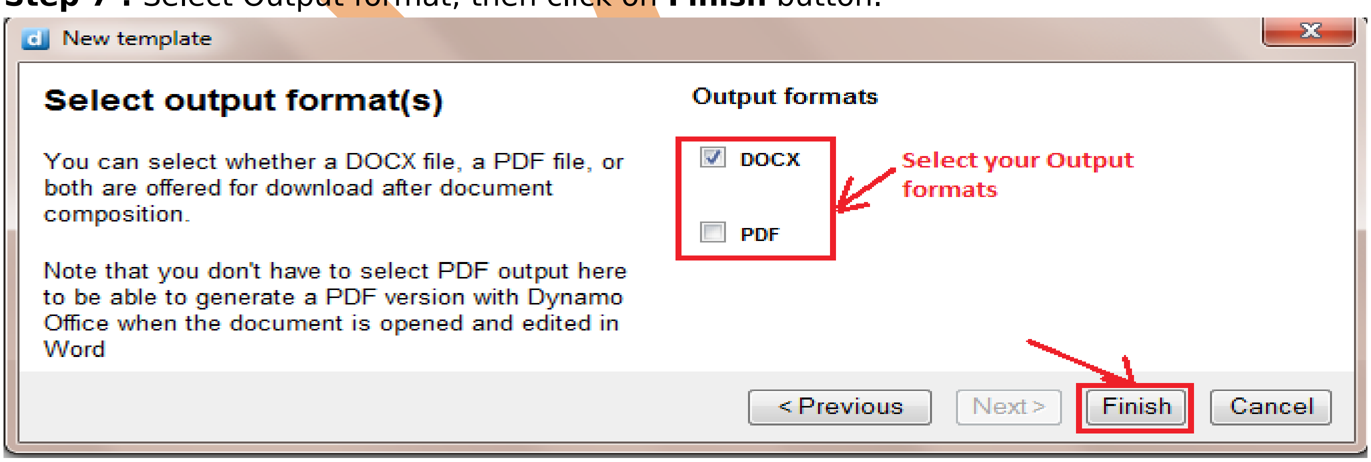
Step 5 : Select a save location, Then click on **Next** button.



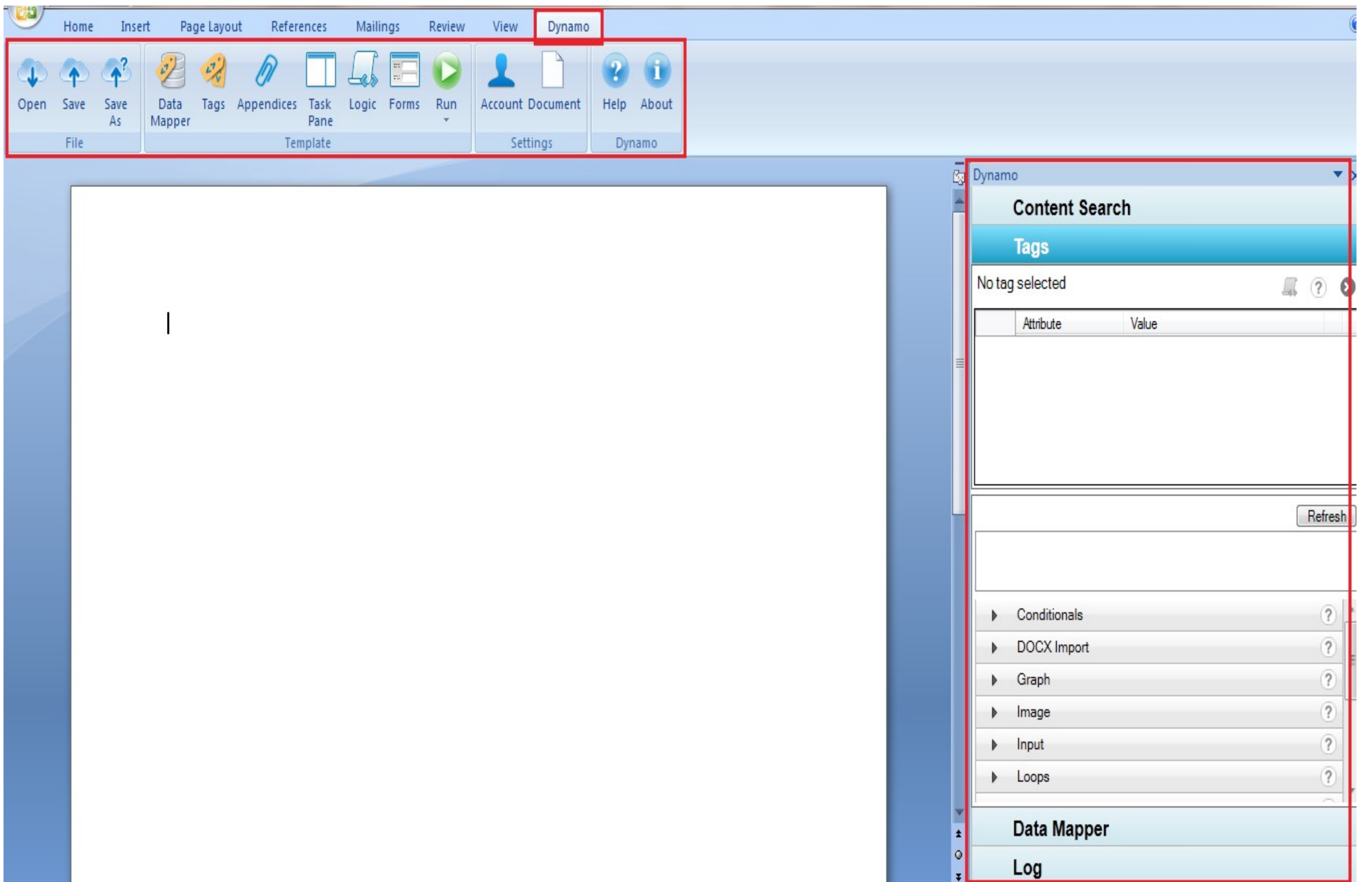
Step 6 : Select an Email option, Then click on **Next** button.



Step 7 : Select Output format, then click on **Finish** button.



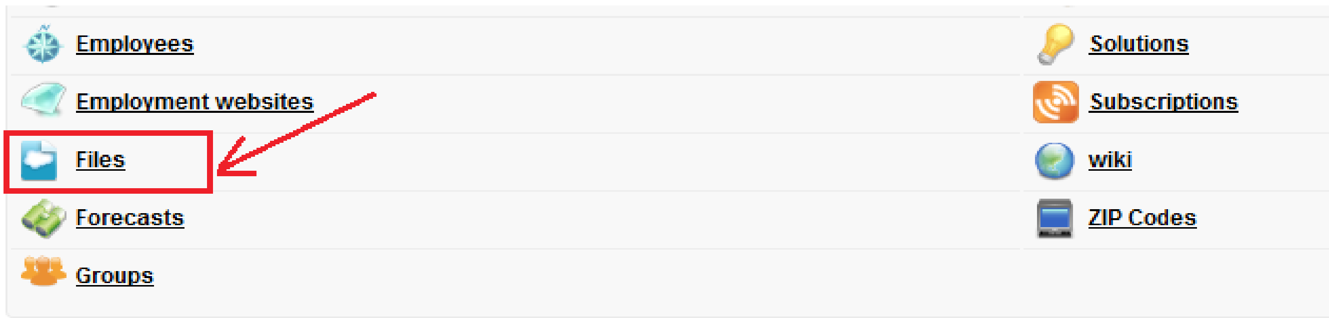
After Finish all step's you can see template lock like, see below.
Data Mapper, Tags, Appendices, Task pane, Logic, Forms, Run.



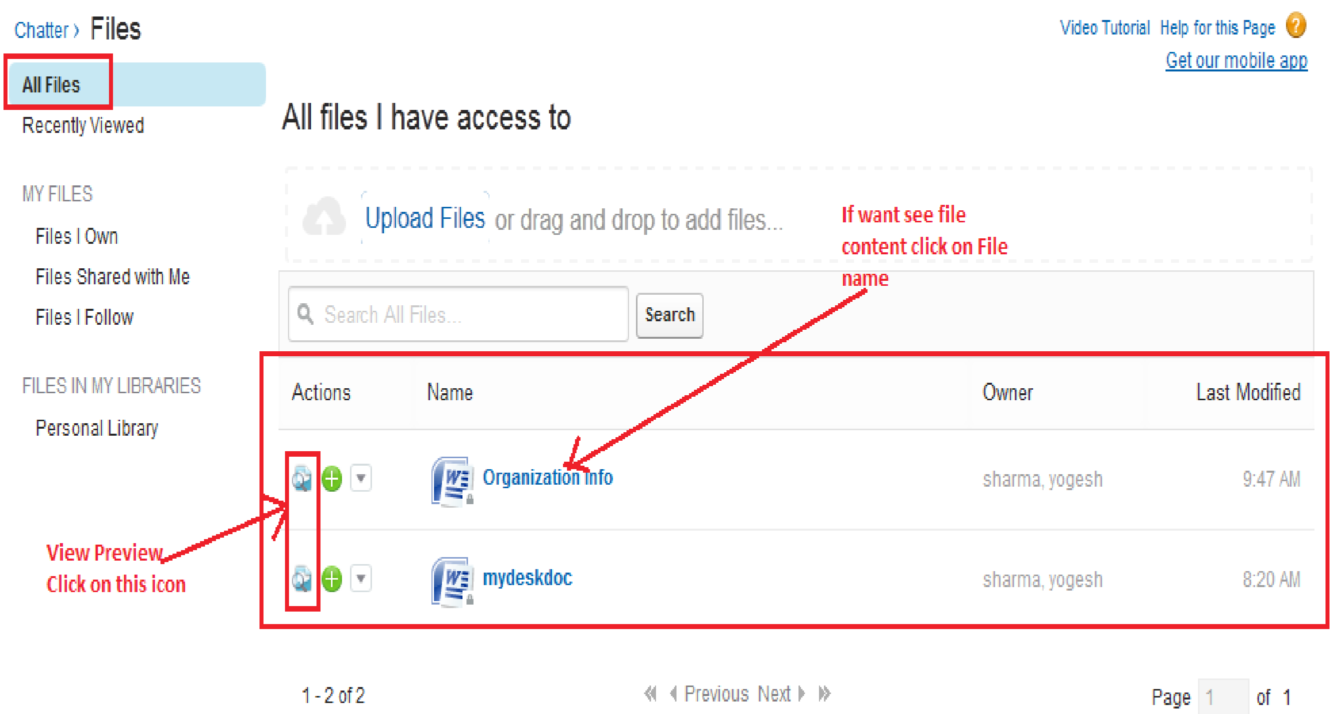
How to See Ms-office Document in SalesForce.com :

Login your SalesForce Page, after successfully login click on **All Tab** icon see below. it available on in menu bar right side..

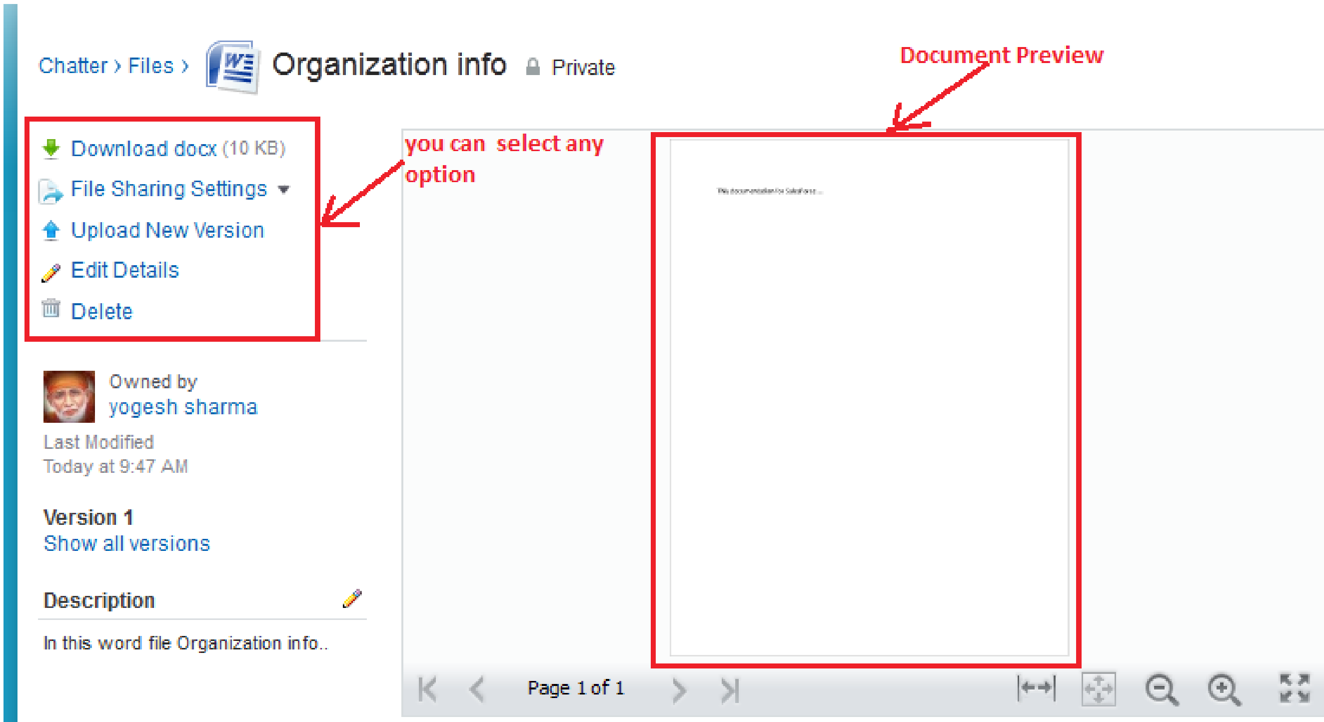
After click on All Tab Icon, you can view All Tab, select Files folder. see below.



After click on Files icon open new web page on this page you can see Ms-office file . see below.



After click on file name.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In this word file Organization info..
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