



## 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 Date	Description Change	Author	Publish
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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.

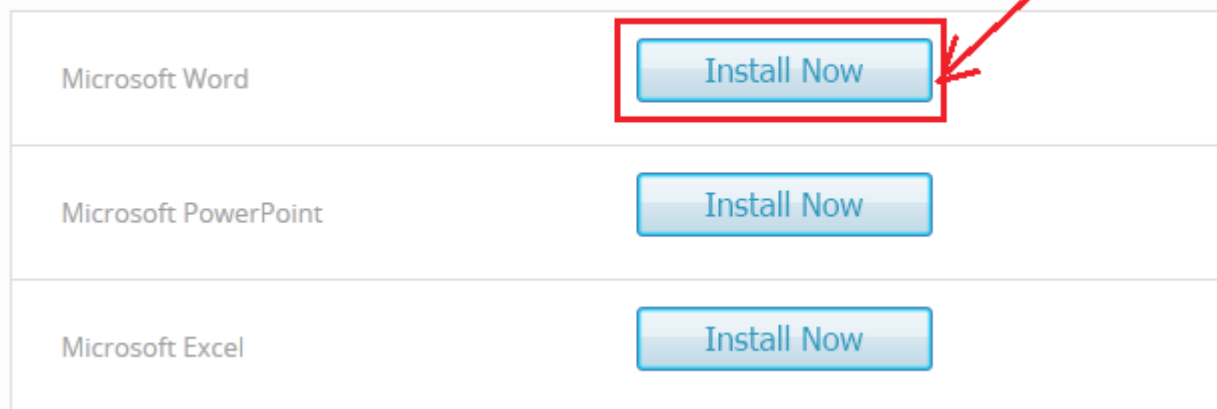
<https://appexchange.salesforce.com/results?keywords=office>

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.

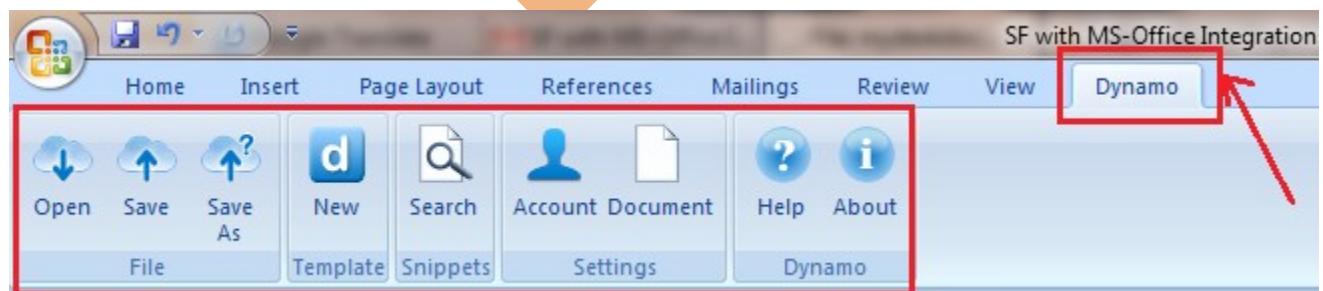
### Install Dynamo Office



Once download setup is complete, After then install on your machine.

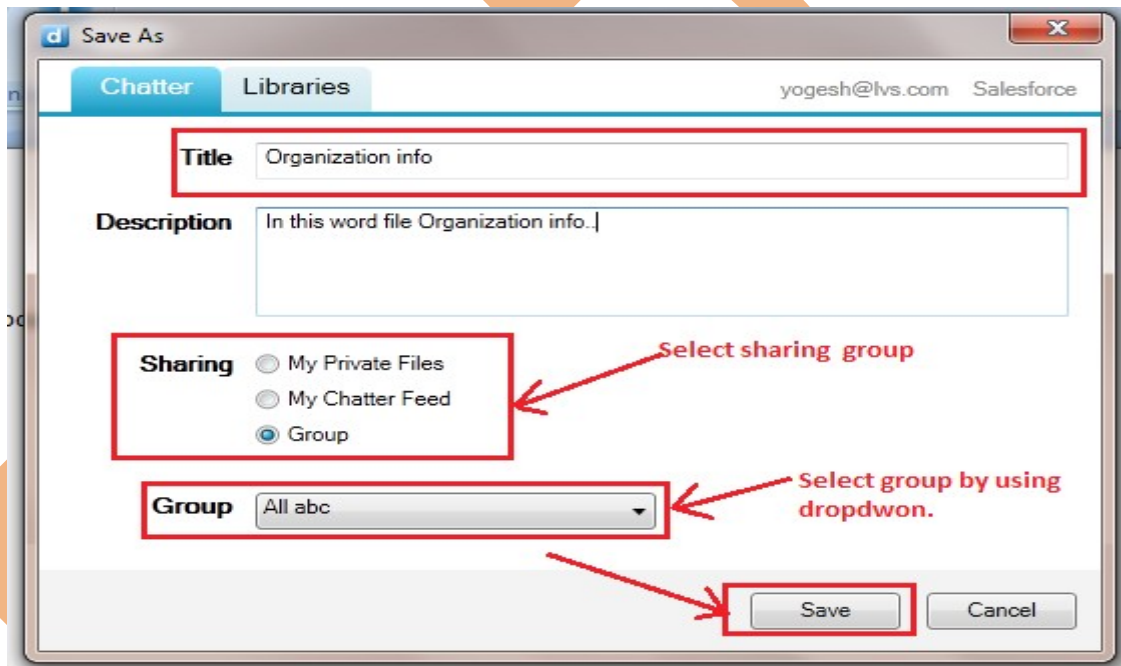
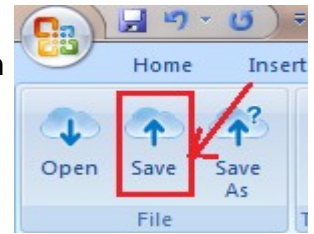
**Note :** Make sure before install Dynamo setup, install Ms-Office setup in your Machine .

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.

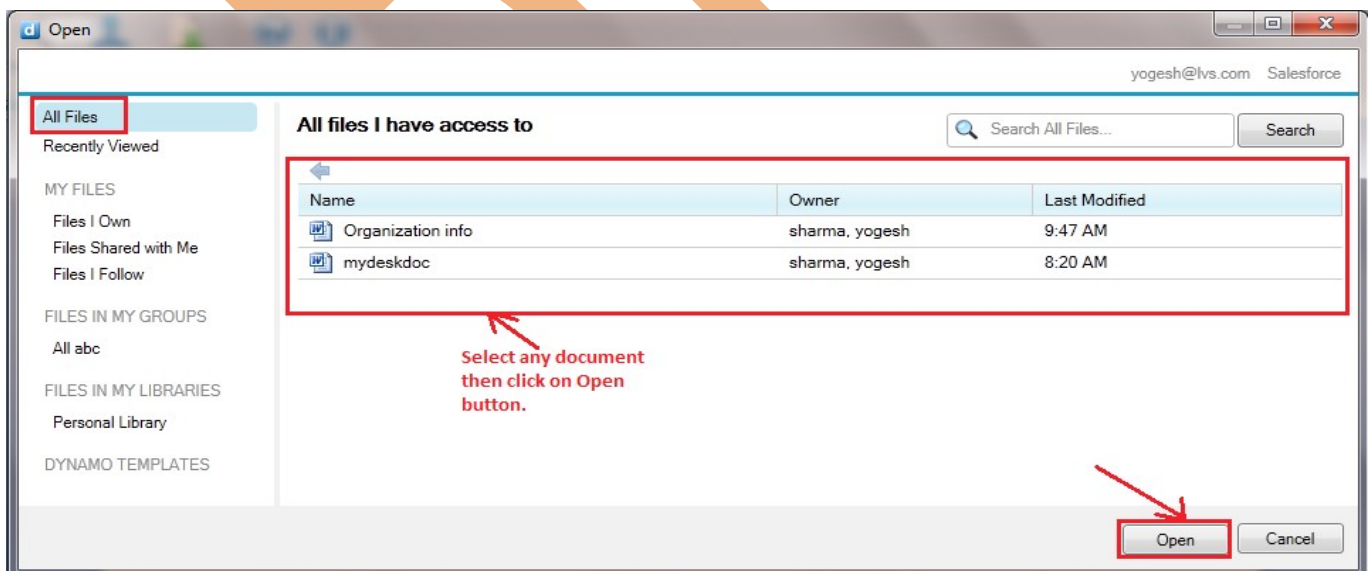


After open Ms-Office then click on **Dynamo** tab there are many option create New template, Open file, Save file , Save As file, search file, You can see account information, See Documentation information, help .  
Perform any operation firstly login with Salesforce mail id or password.

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

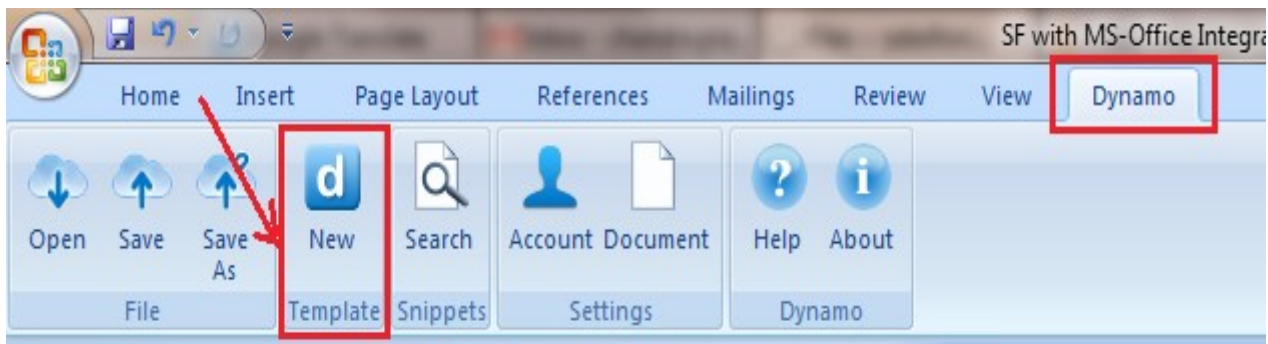


You can also Open these Document file by using Dynamo. Click on **Open** tab .

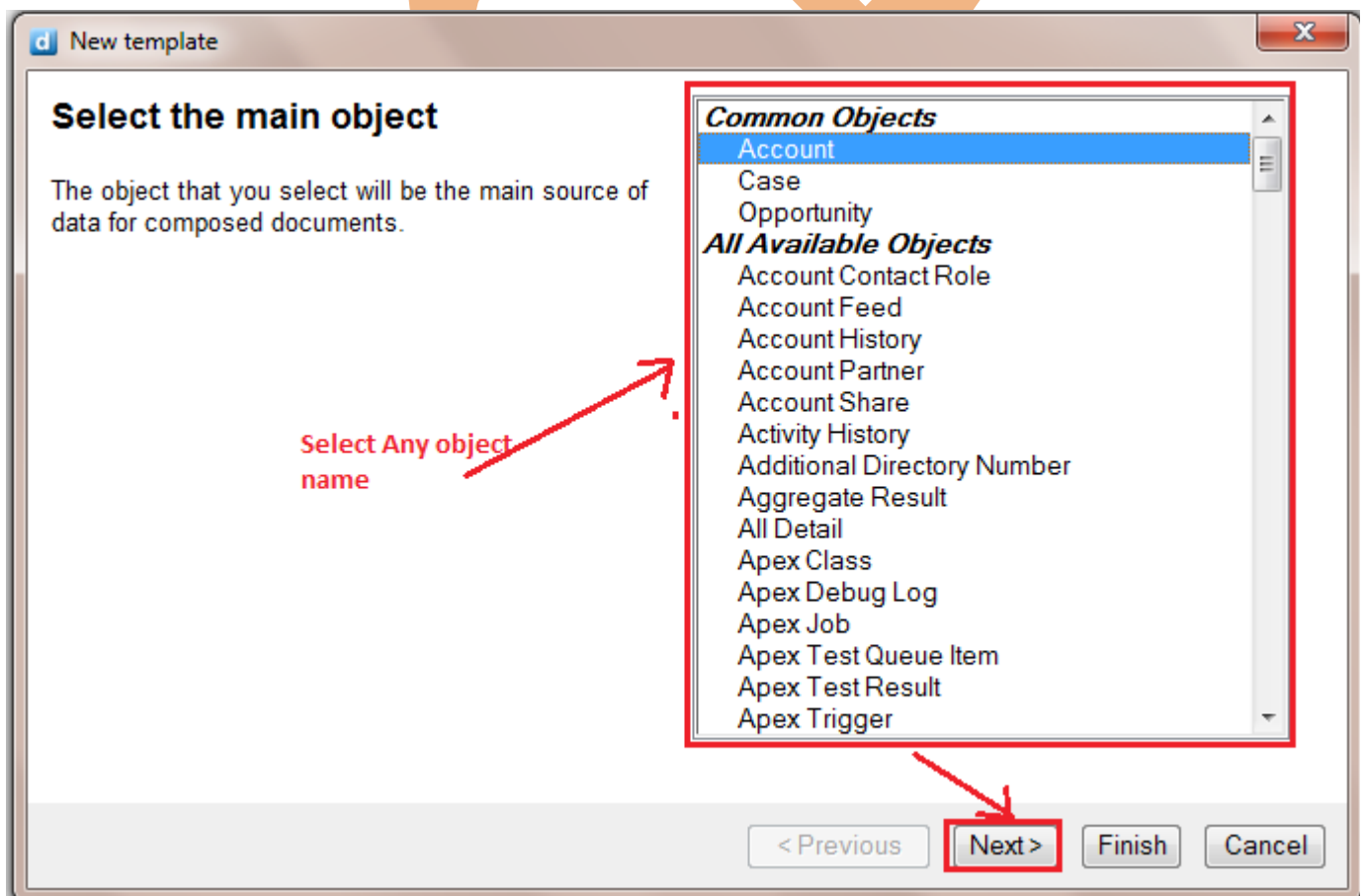


## How to Add New Template :

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.

The screenshot shows a dialog box titled "New template" with a close button (X) in the top right corner. The main heading is "Select a test record for Account". Below the heading, there is explanatory text: "Selecting a test record will enable you to preview this template with actual Salesforce data." Underneath, there is a section titled "Searching tips" with two paragraphs: "To search for a record, type the first letter(s) of its name and press Enter." and "You can use the asterisk (\*) as a wildcard for any string of characters." To the right of the text is a search area with a text input field labeled "Search records" and a "Go" button. Below the search area is a large empty rectangular box. At the bottom of the dialog, there are four buttons: "< Previous", "Next >", "Finish", and "Cancel". A red arrow points to the "Next >" button.

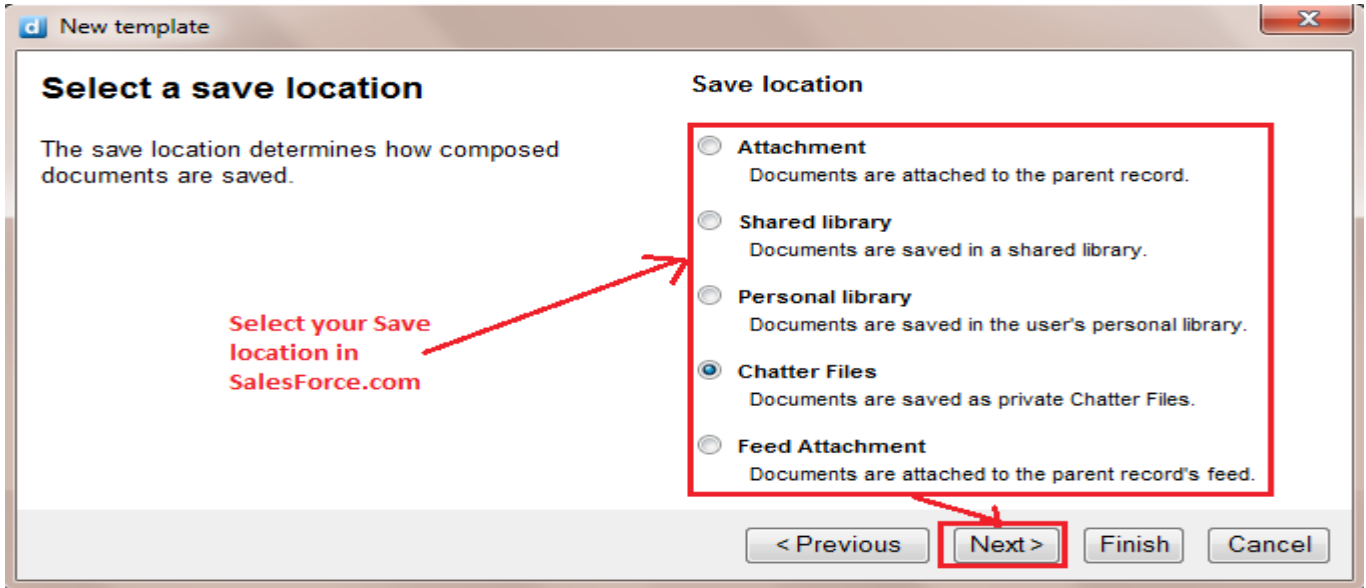
**Step 3 :** Select log Activity Option, Then Click on **Next** button.

The screenshot shows a dialog box titled "New template" with a close button (X) in the top right corner. The main heading is "Select a log activity option". Below the heading, there is explanatory text: "This selection determines whether users can choose to log an activity. If an activity is logged, two task are created: one for creating the document, another for a follow-up." To the right of the text is a section titled "Log activity options" containing three radio button options: "Disabled" (Users will see no log activity options.), "User selection" (Users can select whether an activity is logged.), and "Enabled" (Users can select whether an activity is logged.). The "User selection" option is selected. At the bottom of the dialog, there are four buttons: "< Previous", "Next >", "Finish", and "Cancel". A red arrow points to the "Next >" button.

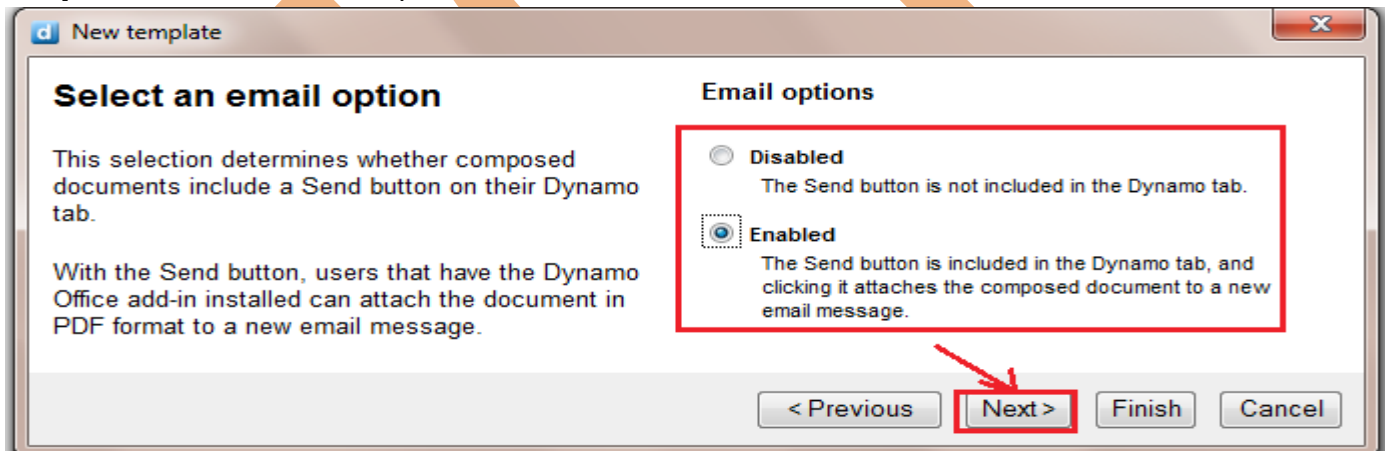
**Step 4 :** Select Save option, then click **Next** button.

The screenshot shows a dialog box titled "New template" with a close button (X) in the top right corner. The main heading is "Select a save option". Below the heading, there is explanatory text: "The save option determines whether composed documents are saved automatically or whether users can save them through the Dynamo Office add-in." To the right of the text is a section titled "Save options" containing three radio button options: "Disabled" (Composed documents are not saved automatically and cannot be saved directly through the add-in.), "Automatic" (Composed documents are saved automatically immediately after composition and cannot be saved directly through the add-in.), and "Enabled" (Composed documents are not saved automatically, but users can save them through the add-in.). The "Enabled" option is selected. At the bottom of the dialog, there are four buttons: "< Previous", "Next >", "Finish", and "Cancel". A red arrow points to the "Next >" button.

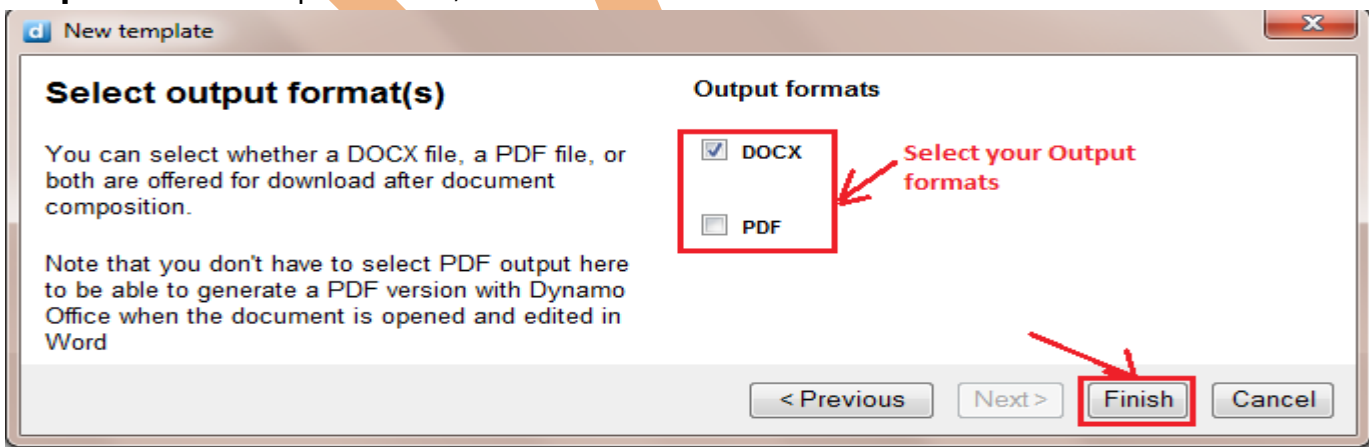
**Step 5 :** Select a save location, Then click on **Next** button.



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

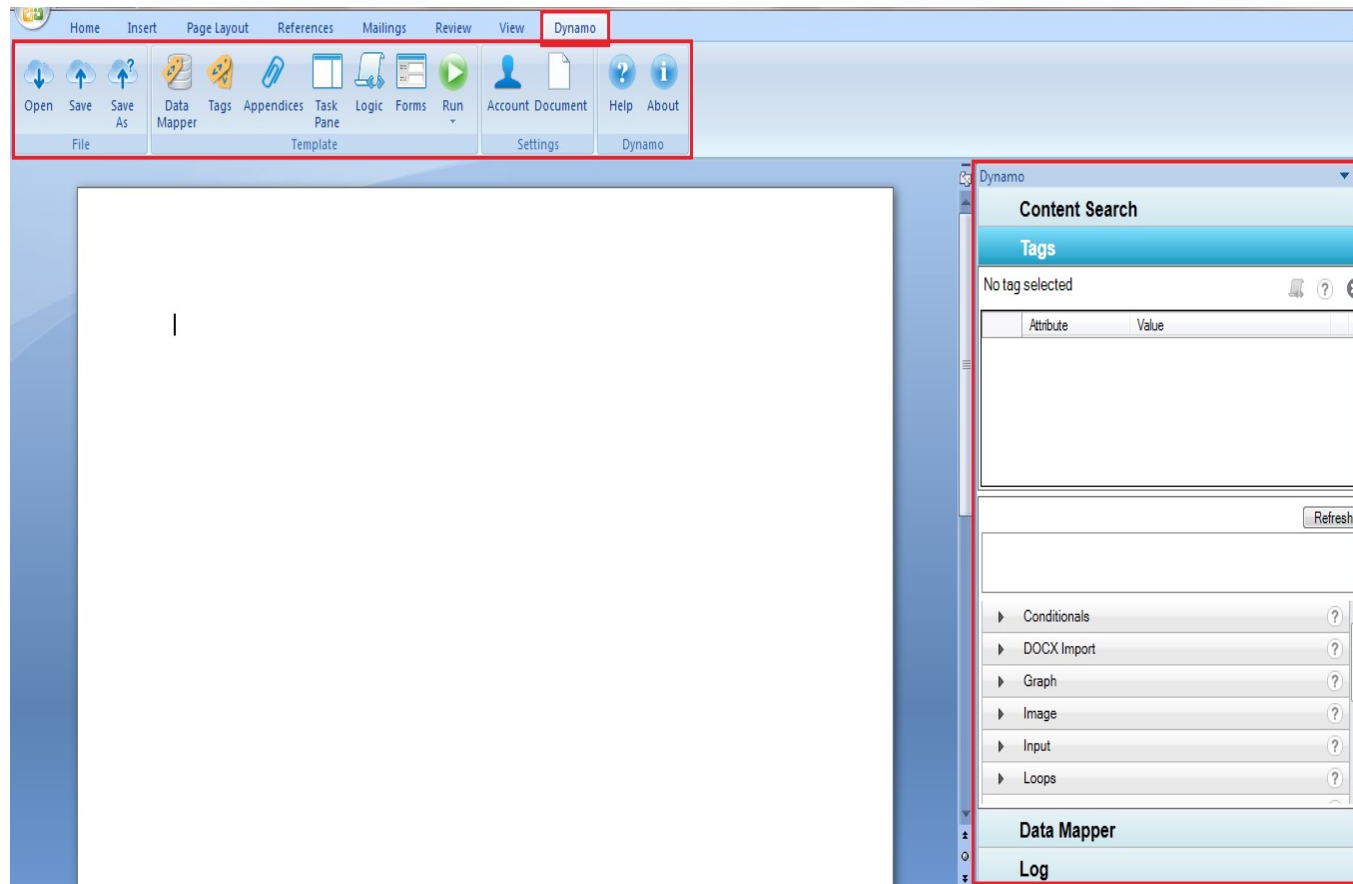


**Step 7 :** Select Output format, then click on **Finish** button.





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



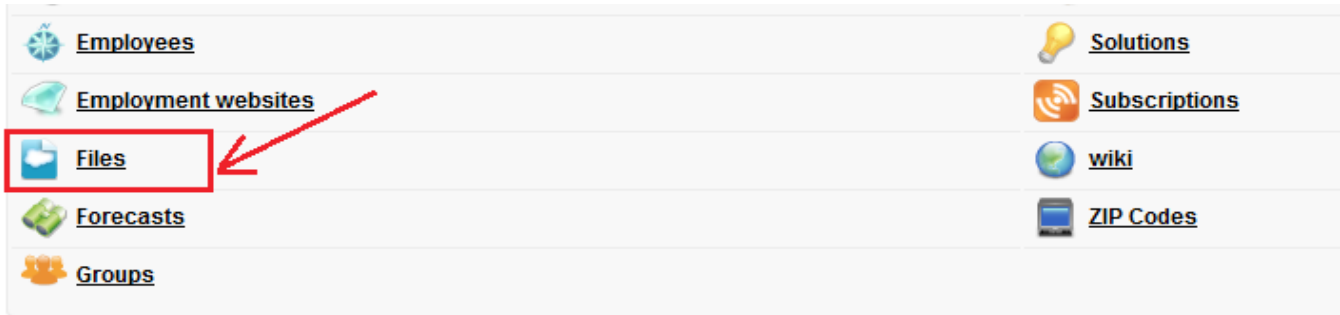
### How to See Ms-office Document in Salesforce.com :

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.


The screenshot shows the 'Files' page interface. At the top, there is a breadcrumb 'Chatter > Files' and links for 'Video Tutorial', 'Help for this Page', and 'Get our mobile app'. A red box highlights the 'All Files' tab. Below it, the text 'All files I have access to' is displayed. A search bar is present with the placeholder 'Search All Files...' and a 'Search' button. A red arrow points to the search bar with the text 'If want see file content click on File name'. Below the search bar is a table of files:

Actions	Name	Owner	Last Modified
 	 Organization Info	sharma, yogesh	9:47 AM
 	 mydeskdoc	sharma, yogesh	8:20 AM

A red box highlights the 'View' icons in the 'Actions' column. A red arrow points to the 'View Preview' icon with the text 'View Preview, Click on this icon'. At the bottom, there is a pagination bar showing '1 - 2 of 2' and 'Page 1 of 1'.

After click on file name.

-  Download docx (10 KB)
-  File Sharing Settings ▾
-  Upload New Version
-  Edit Details
-  Delete

 Owned by  
yogesh sharma  
Last Modified  
Today at 9:47 AM

**Version 1**  
[Show all versions](#)

**Description**   
In this word file Organization info..

Document Preview

you can select any option



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