



OUTLOOK INTEGRATION REFERENCE GUIDE

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Outlook Integration Reference Guide

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Introduction

Welcome, Sherpa users! This guide will show you how to integrate Sherpa with your Microsoft Outlook account so you can create sales notes in Sherpa from your inbox, sync your Sherpa calendar with Outlook and seamlessly update events on both calendars with the push of a button.

If you have questions throughout this guide, please contact our Customer Experience team at (314) 432-1234 or by email at support@sherpacrm.com.

Getting Started

Installation

Your IT team has already installed the Sherpa integration onto your computer. To ensure that the integration has been installed correctly, look for the Sherpa icon on the menu bar of your Outlook window.

Platform Compatibility

Browsers

The Sherpa integration for Outlook is compatible with Google Chrome and Internet Explorer (versions 11 and up). We recommend updating your browser to the latest version in order for the integration to work properly. To see what browser you're currently using, visit whatbrowser.org.

Desktop Application

Our integration will also work on the Microsoft Outlook desktop application. To use the integration on a Mac, make sure the Outlook desktop application is version 15.33 or higher. To use the integration on a Windows PC, the version must be 16.0.7902 or higher. You'll know you're using the right version if Sherpa's orange mountain icon appears in your email inbox.

Email Integration Notes

Log In

The first time you use the integration in Outlook, you'll be prompted to enter your Sherpa log-in credentials.

Make sure you're using the same email address for both Sherpa and your Microsoft Outlook account. The integration won't be able to link the accounts unless the email addresses match.

Add a Sales Note

With this integration, you can add an "Email In" or "Email Out" sales note to a prospect or referral's Sherpa profile directly from your inbox. The sales note will automatically include the entire body of an associated email.

Select Email

Email chains can be long and involved. Before adding a sales note, make sure to choose the exact email you want submitted into Sherpa. To record an "Email In" note, first select an email with your address in the "To" field.

To record an "Email Out" note, go to the Sent Items folder in Outlook and select the email you want. Make sure your address is in the "From" field. (If you're using Outlook in a browser, you can also record an "Email Out" note by clicking directly on a sent email in your inbox.)

Add a Sales Note from Outlook

Add a Sales Note

If your email is linked to multiple companies in Sherpa, your second step will be to select the company you're currently working in.

1. Click on Sherpa's icon in the upper-right section of your Outlook window and select **Create sales note** (Figure 1). A sidebar will appear on the right.

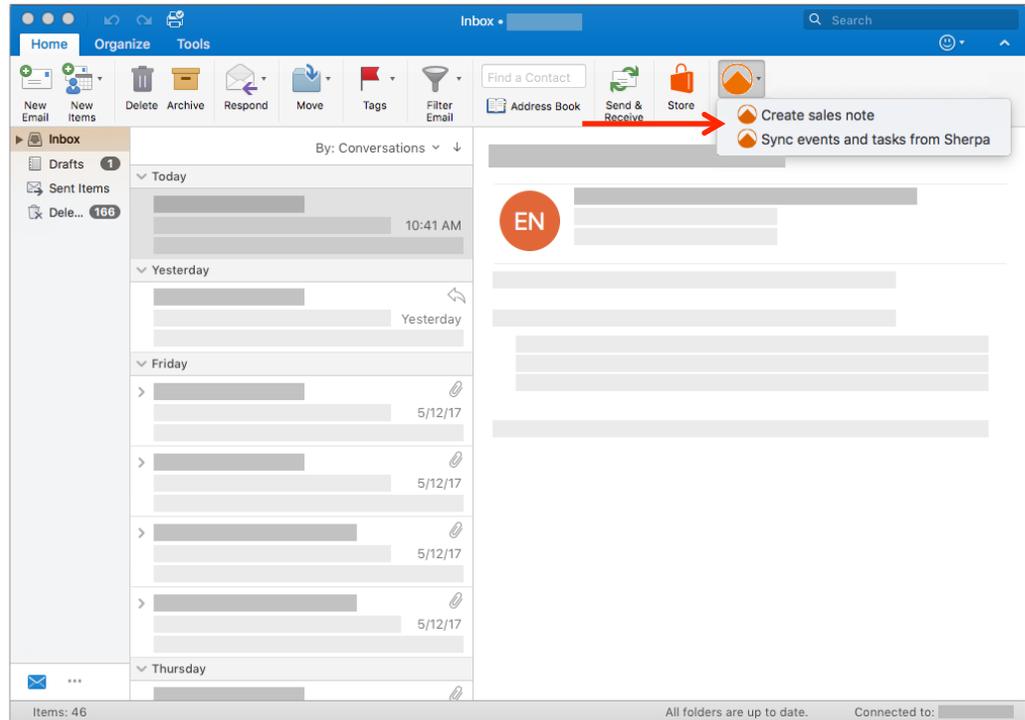


Figure 1 Click "Create sales note" to open the sales note form.

Sherpa will classify the entry's Outcome as a "Continuation." To change this Outcome, edit the entry directly from Sherpa.

2. Enter the amount of Time in the Selling Zone® you spent on the task. Sherpa will prefill the date, time, counselor and action (Figure 2).
3. Optional: Write an additional note that will appear before the email body in the sales note once submitted to Sherpa (Figure 2).
4. Click **Save Note**. A success screen will appear with hyperlinks to the updated prospect or referral profile(s) (Figure 3).

Important Things to Note

- Make sure your prospect or referral's email address is included in their Sherpa profile so Outlook knows where to send their sales notes.
- Sherpa will automatically attach a previous strategy for prospects or referrals onto notes created from Outlook. If there is no previous strategy, this section of the note will simply read "None."

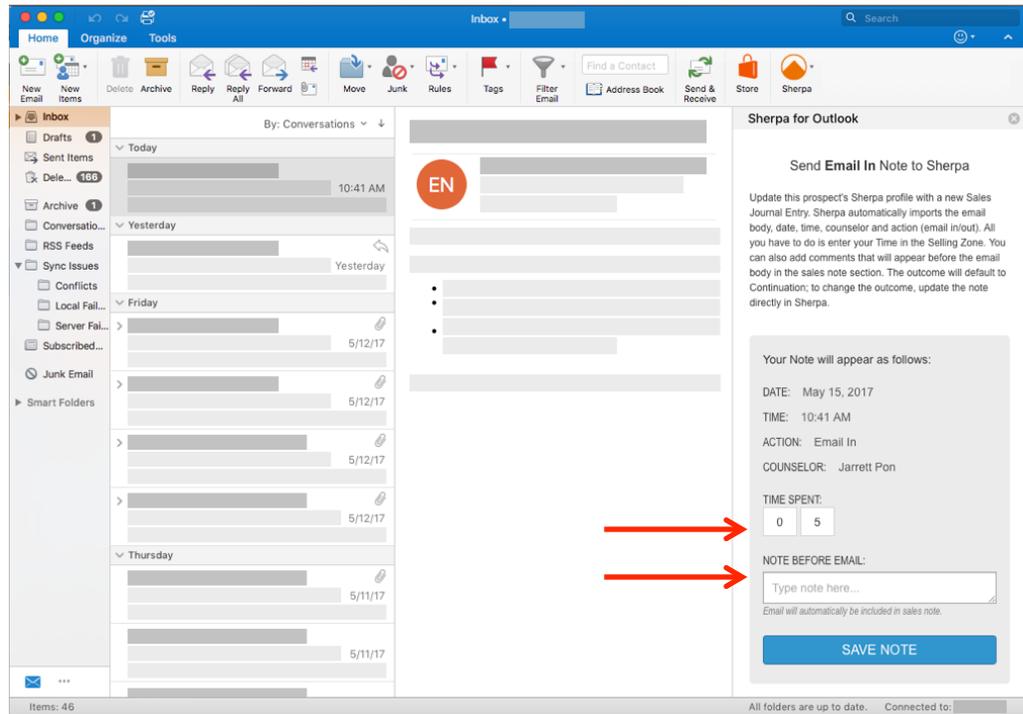


Figure 2 Enter Time in the Selling Zone and an optional note.

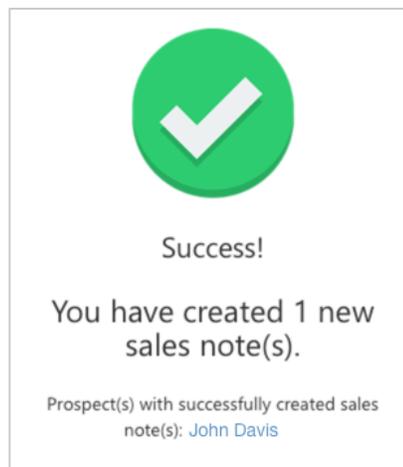


Figure 3 Success message will appear on the right sidebar.

Sync Sherpa Calendar to Outlook

Add Sherpa tasks and face-to-face events to your Outlook calendar with the click of a button.

Sync Events and Tasks from Sherpa

1. Click on any calendar event in your Outlook calendar. Make sure it's an event *you* created, not an event added from a shared invitation.

2. Click on Sherpa's orange mountain icon and select **Sync events and tasks from Sherpa** (Figure 4).

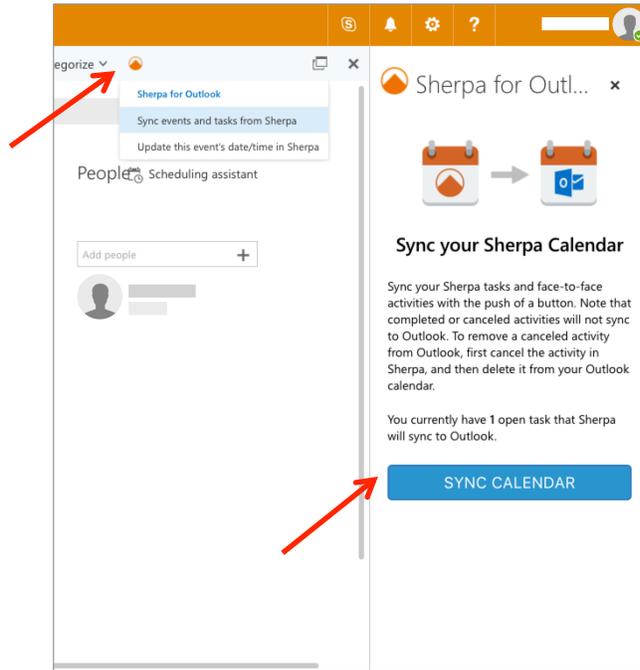


Figure 4 Click "Sync events and tasks from Sherpa" to get started, then press the "Sync Calendar" button on the right sidebar.

Events added to Outlook will automatically include the time, date, prospect or referral name, event title (i.e. Home Visit) and description.

3. On the right sidebar, click the **Sync Calendar** button (Figure 4).
4. A success screen will appear announcing the number of tasks and events that were synced (Figure 5).

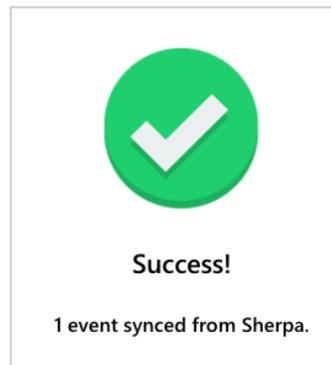


Figure 5 Success message will appear on the right sidebar.

5. Close the sidebar and the event windows. This will take you back to your synced calendar. If you don't see your synced events immediately, refresh the page.

Important Things to Note

- Microsoft Office does not currently support the Sync Calendar function on the Mac desktop application. However, Mac users can still sync calendars via their browser. Clicking the **Sync events and tasks from Sherpa** button will bring up a sidebar that will redirect you to your browser.
- To add an “All day” event in Outlook, keep the start and end times blank in the *Next Steps* section of your Sherpa journal entry.
- When you first sync, the integration will create a new calendar called “Sherpa” under your calendar menu (Figure 6). **Note:** Don’t change the name of this calendar! Otherwise, the integration will create a new calendar called “Sherpa” the next time you sync.

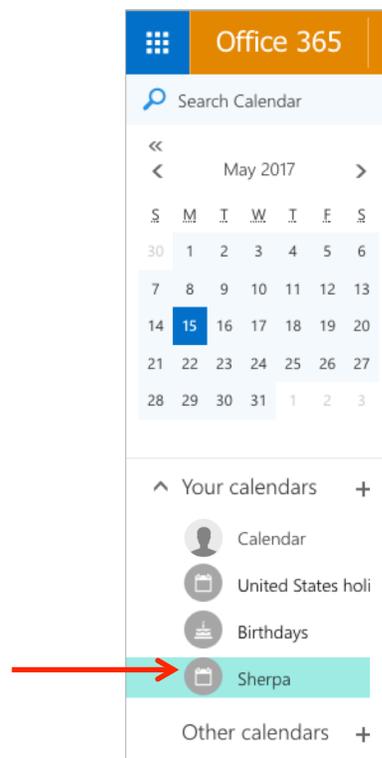


Figure 6 “Sherpa” calendar that appears once synced.

- Events must be linked to a prospect or referral profile in order to sync to the Outlook calendar.

Updating Events from Outlook to Sherpa

Have a time or date change for a Sherpa event in Outlook? No problem. The Sherpa integration allows you to update events and tasks already synced to Outlook.

Updating Events from Outlook to Sherpa

1. Click on the event you want to edit and make changes as necessary to the date and times. Start and end dates must match.
2. Click the Sherpa icon in the upper toolbar and select **Update this event's date/time in Sherpa** (Figure 7).
3. A sidebar will appear with more information about updating events. Click the **Update Event** button (Figure 7).

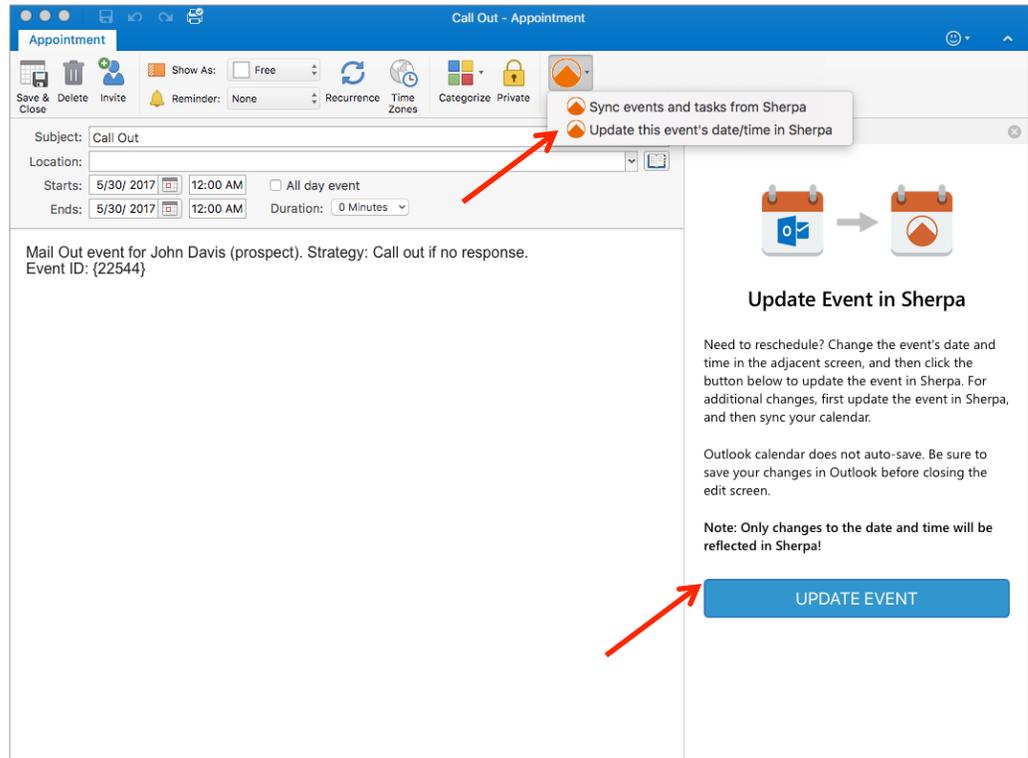


Figure 7 Click "Update this event's date/time in Sherpa" to get started, then press the "Update Event" button on the right sidebar.

4. If updated correctly, a success screen will appear on the right sidebar (Figure 8).

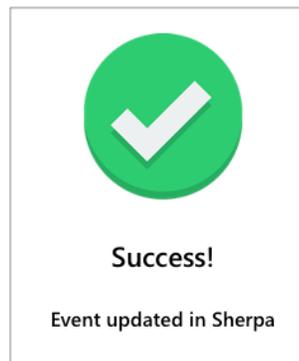


Figure 8 Success message will appear on the right sidebar.

5. Close the sidebar and save the event you are currently editing. (Outlook will prompt you to save the event before you exit.) This will take you back to your calendar.

Important Things to Note

- This integration will only change an event's date and time. Any edits to the title or description will not transfer to Sherpa and will be erased by the next sync.
- Sherpa will not recognize multi-day events in Outlook. If you update a Sherpa event in Outlook to include different start and end dates, Sherpa will *only* use the end date for that event.
- Sherpa automatically includes an ID number in curly brackets (i.e. {11735}) in each synced event. To prevent errors, please do not delete this ID or use curly brackets elsewhere in the event description.

Questions

Questions? Please reach out to our Customer Experience team at support@sherpacrm.com or give us a call at (314) 432-1234.