

MICROSOFT OUTLOOK TO SALESFORCE · AUTOMATED ACTIVITY CAPTURE · SERVICES ENGAGEMENT

Every Microsoft Outlook Email, Meeting, and Task. Logged to Salesforce. Automatically.

Live in 4 weeks. Fixed fee. Zero rep behavior change.

Up to 60% of meaningful sales activity goes unlogged when organizations rely on manual data entry. Sales reps live in Microsoft Outlook but their emails, meetings, and tasks never make it into Salesforce. The result is incomplete pipeline data, thin stakeholder maps, and forecasting built on what reps remember to log.

GPTfy Mail Sync captures activity server-side via Microsoft Graph. No browser plugins, no desktop add-ins, no behavior change. Every Microsoft Outlook email, Microsoft Outlook calendar event, and Microsoft To Do task is automatically pulled, filtered for business relevance using AI, and matched to the correct Account, Contact, Lead, and Opportunity in Salesforce. Runs entirely inside your Microsoft Azure tenant and your Salesforce org. Fixed fee services engagement. Powered by GPTfy Workspace Sync.

Microsoft AppSource <small>Listed and verified</small>	Salesforce AppExchange <small>Listed and verified</small>	Your Microsoft Azure <small>Runs inside your own tenant</small>	No plugins <small>No rep behavior change</small>
<p>Activity logging TODAY 60% unlogged</p> <p>↓</p> <p>WITH MAIL SYNC Zero manual</p> <p><small>Server-side capture, no rep effort</small></p>	<p>Stakeholder maps TODAY Stale</p> <p>↓</p> <p>WITH MAIL SYNC Buying committee</p> <p><small>Visible in Salesforce</small></p>	<p>Activity records TODAY Duplicated</p> <p>↓</p> <p>WITH MAIL SYNC Deduplicated</p> <p><small>Salesforce Shared Activities</small></p>	<p>Forecasting TODAY Blind</p> <p>↓</p> <p>WITH MAIL SYNC Full context</p> <p><small>Pipeline backed by real activity</small></p>

Microsoft Outlook to Salesforce. Server-side. AI-matched. Fully automated.

Services engagement. Fixed fee.

"60% of meaningful sales activity goes unlogged when organizations rely on manual data entry."

Source · Industry research

"Your pipeline forecast is only as accurate as what reps remember to log. GPTfy Mail Sync removes that dependency entirely."

Source · GPTfy

1 CAPTURE

Automated Email Capture

- Every Microsoft Outlook email captured server-side via Microsoft Graph and matched to Salesforce records automatically
- No manual logging. No browser plugin. No desktop add-in
- Reps change nothing about how they work in Microsoft Outlook

Zero rep effort. Zero behavior change.

2 AI MATCH

AI-Powered Record Matching

- AI reads each email, determines business relevance, and links it to the correct Account, Contact, Lead, and Opportunity
- Only business email is logged. Personal, internal, and filtered categories are excluded automatically
- CC and BCC participants surfaced on the activity record

Right email. Right record. Every time.

3 SYNC

Calendar and Task Sync

- Microsoft Outlook calendar events linked to the right deals with attendees auto-resolved to Salesforce Contacts
- Microsoft To Do tasks synced to Salesforce Activities
- Full meeting and task history visible on every record

Meetings and tasks, not just email.

4 PRIVACY

Privacy and Compliance Built In

- Sensitive content stripped before logging. Automated mode leaves no security audit record
- Domain exclusions, label filters, and per-user opt-in ensure nothing syncs without permission
- Runs entirely inside your Microsoft Azure tenant and Salesforce org

Your tenant. Your org. Your policy.

SECURITY Your Tenant. Your Org.

- ✓ Runs entirely inside your Microsoft Azure tenant and Salesforce org
- ✓ No GPTfy servers see your email content
- ✓ Zero-trust ready architecture
- ✓ Full audit trail on every sync decision

TRUST Built for Regulated Industries

- ✓ Approved on Microsoft AppSource and Salesforce AppExchange
- ✓ Supports bring-your-own-model AI
- ✓ Built for financial services, insurance, healthcare, and manufacturing
- ✓ Per-user opt-in. Nothing syncs without permission.

60%

ACTIVITY UNLOGGED WITHOUT AUTOMATION

4 weeks

KICKOFF TO PRODUCTION

\$10,000

FIXED FEE. NO SURPRISES.

0

REP BEHAVIOR CHANGES REQUIRED