

Top 5 SMB Tools That Integrate Seamlessly with Salesforce

With setup steps, use cases & pro tips

Why Integrations Matter for SMBs

Integrating Salesforce with the tools you already use (like Mailchimp, Outlook, or Xero) saves time, avoids double data entry, and ensures your sales, marketing, and finance teams work in sync.

Mailchimp

Use Case: Automate email campaigns based on Salesforce leads/contacts.

Integration Method:

- Native integration via Mailchimp for Salesforce AppExchange package
- Syncs audiences, campaign activity, and automations

Setup Link: [Install on AppExchange](#)

Pro Tip: Segment lists in Salesforce using reports and send targeted campaigns.

Microsoft Outlook

Use Case: Sync emails and meetings with Salesforce records.

Integration Method:

- Use “Salesforce for Outlook” or the Outlook Integration & Einstein Activity Capture
- Auto-logs activities to leads, contacts, and opportunities

Setup Link: [Outlook Integration Setup](#)

Pro Tip: Enable Lightning Sync to keep calendars and contacts aligned

Xero

Use Case: View financial data (like invoices or payments) inside Salesforce.

Integration Method:

- Use third-party connectors like Breadwinner, Zapier, or custom APIs

Setup Link: Breadwinner for Xero

Pro Tip: Add invoice/payment status to Opportunity layouts to assist sales follow-ups.

Slack

Use Case: Get Salesforce alerts, reports, and approvals directly in Slack channels.

Integration Method:

- Use Salesforce for Slack official integration

Setup Link: [Salesforce for Slack](#)

Pro Tip: Create custom workflows (e.g. "Send Slack alert when a deal >£5k closes").

Google Workspace (Gmail/Drive/Sheets)

Use Case: Share docs, manage calendars, and collaborate on Salesforce-linked data.

Integration Method:

- Salesforce Gmail Integration, Google Drive Connectors, Google Sheets Data Connector

Setup Link: [Salesforce for Google Workspace](#)

Pro Tip: Use Google Sheets live sync with Salesforce reports for dashboards.