Lightning for Gmail

September 21, 2017

Agenda

- CRM Overview

- Lightning for Gmail

  - Who should be using it

  - Activities you can perform using it

- Demo

- Guidelines to use

- Lightning for Gmail Chatter Group

- Questions

CRM

- What is CRM
  - Practice, strategies and technologies used by company to manage, retain and improve customer interactions.
  - Accounts, Contacts and Task/Activities
  - Challenges

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What is Lightning for Gmail?

- Lightning for Gmail allows users to access their Salesforce instance directly from their Gmail Inbox and eliminates the need to switch back and forth between applications.
- With Lightning for Gmail, you can add a contact, email, event or opportunity directly from Gmail to Salesforce in just a few clicks.
- Users can also increase their efficiency by using already created Salesforce email templates within Gmail.

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Demo

Guidelines for Use

Do not sync **sensitive** data to Salesforce (e.g., SSN)	🚫
Do not sync **personal** Emails, Contacts and Events to Salesforce	🚫
Do sync Contacts, Events and Emails that relate to your Salesforce Accounts, Contacts, Leads and Opportunities	✓

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Lightning for Gmail Chatter Group

[Chatter Group](#)

Questions?