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
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.
Demo
### Guidelines for Use

<table>
<thead>
<tr>
<th>Do not sync <strong>sensitive</strong> data to Salesforce (e.g., SSN)</th>
<th>☠️</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not sync <strong>personal</strong> Emails, Contacts and Events to Salesforce</td>
<td>☠️</td>
</tr>
<tr>
<td>Do sync Contacts, Events and Emails that relate to your Salesforce Accounts, Contacts, Leads and Opportunities</td>
<td>✅</td>
</tr>
</tbody>
</table>
Lightning for Gmail Chatter Group

Chatter Group
Questions?