

# HOW TO: SALES CLOUD:

## Set up “Lightning for Gmail”

### Get started with Lightning for Gmail and Lightning Sync for Google.

Give your sales reps the ability to add emails and other important information to their Salesforce records. In just 2 hours we will help you work more efficiently in Gmail, while capturing key information in Salesforce. We can also help you set up Lightning Sync for Google to synchronize events and contact information with Salesforce.

### What it can do for you.

- Increased accuracy of data as reps can capture emails and relate them directly to records in Salesforce
- Visibility into your Salesforce data right from within Gmail
- With Lightning for Gmail you can : Search records, create and edit records, post directly to chatter, and much more.
- With Lightning Sync for Google you can: automatically sync your contacts and events, associate events and contacts with Salesforce records.
- Reduces IT overhead as no upgrades or installations are required.
- Time savings, no dual entry of critical Salesforce data including emails, contacts, and events

### How It Works

A Certified Specialist will guide you through the process via one 2-hour virtual consultation.

- **Feature introduction.** We'll discuss and review Lightning for Gmail or Lightning for Gmail and Lightning Sync for Google to provide you with a good understanding of how features works.
- **Setup and configuration.** We'll guide you through the initial configuration process for Lightning for Gmail or Lightning for Gmail and Lightning Sync for Google.
- **Walk-through.** We'll walk you through key functions including searching for records, saving an email, creating a record from Gmail, and more.
- **Rollout.** We'll provide you with roll out guidelines, understanding of advanced features, and additional resources to help you implement these tools to the rest of your sales users.

### ADDITIONAL INFORMATION

#### Premier or Signature

Time you will spend on this Accelerator: 2-3 hours

#### GOAL

Achieve Faster ROI

#### INTENDED USER

Any customer looking for guidance on getting Lightning for Gmail and Lightning Sync for Google up and running.

#### PREREQUISITES

- Must have Premier or Signature Success Plan.
- Covers customers implementing Lightning for Gmail and Lightning Sync for Google from scratch
- Works with both Lightning AND Salesforce Classic
- No code or data migration is included
- Willingness to complete a customer satisfaction survey at the conclusion of the Accelerator

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To schedule your 1-on-1 Accelerator, [visit our Help Portal](#), or contact your account executive or success team today!

#### Corporate Headquarters

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