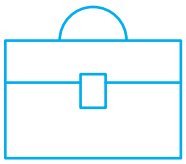


THE ADMIN TOOLKIT FOR SALESFORCE INBOX





Welcome to the Salesforce Inbox Toolkit

With Salesforce Inbox you can spend less time on busywork and more time selling. That's because you get the full power of Sales Cloud, right from your inbox, wherever you go. By bringing the power of Relationship Intelligence to your inbox, Salesforce Inbox streamlines tedious tasks with updating CRM data, scheduling meetings, and answer emails so your team can focus on what matters most: connecting with customers.

Salesforce Admins, we've provided all the tools you need to roll-out Inbox to your team in just 3 easy steps! These documents are available in PDF and on our help center linked below.

- 1 [Admin License Assignment Guide](#)**
Follow instructions on pages 3 - 5 in this pdf to document to install assign Inbox licenses to your users.
- 2 [App Installation Guide](#)**
Have users install and connect inbox
- 3 [Best Practices Guide](#)**
Share these pro tips with your users to make the most of Inbox

Now your team is all set up to become power users of Salesforce Inbox!

Where to Begin

As a Salesforce admin, your first step for getting up and running on Salesforce Inbox is to install the Salesforce Inbox Control Panel. Once you install the Salesforce Inbox Control Panel, you can assign your Inbox licenses to your users. This guide will walk you through how to complete these steps.

Before you begin, please ensure you meet the following criteria:

- You are an administrator of your Salesforce Sales Cloud, Service Cloud, or Force.com organization.
- You are able to access “**Installed Packages**” and “**Manage Users**” under the **Set Up** tab in your Salesforce Sales Cloud, Service Cloud, or Force.com account.

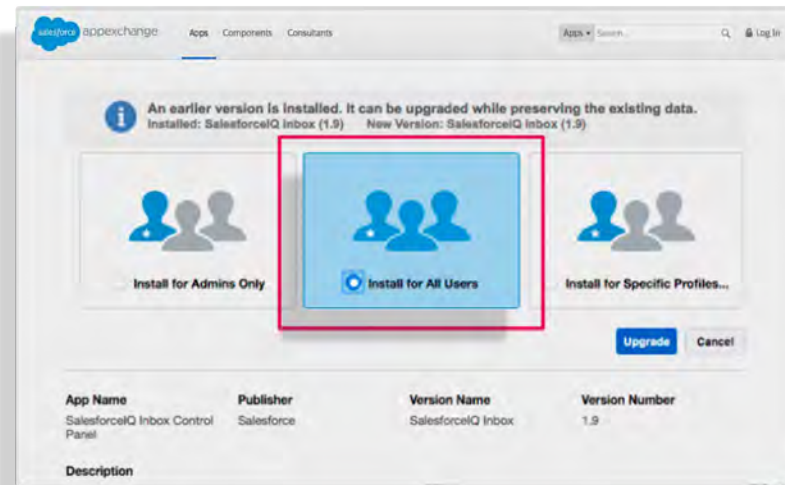
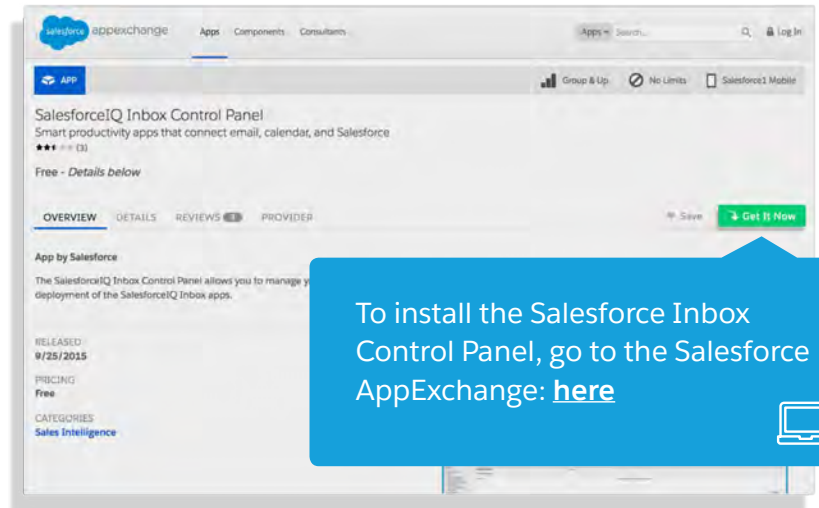
If you are unsure who your organization admin is, you can find them by following the instructions [here](#).

Install the Salesforce Inbox Control Panel

01

First, install Salesforce Inbox Control Panel from the Salesforce AppExchange.

This plugs into Sales Cloud, Service Cloud and Force.com, and allows Salesforce Admins to manage their Salesforce Inbox users.

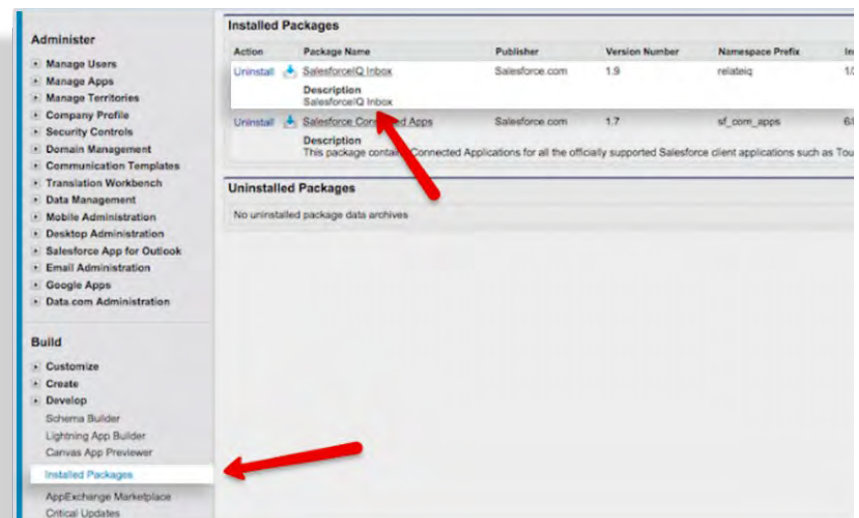


02

Be sure to select **Install for All Users** after you download the Salesforce Inbox Control Panel package.

03

Confirm the Salesforce Inbox Control Panel package has installed and the version number is 1.9 or later. In the upper right corner, select **Setup**. In the left hand panel, select **Build > Develop > Installed Packages**.

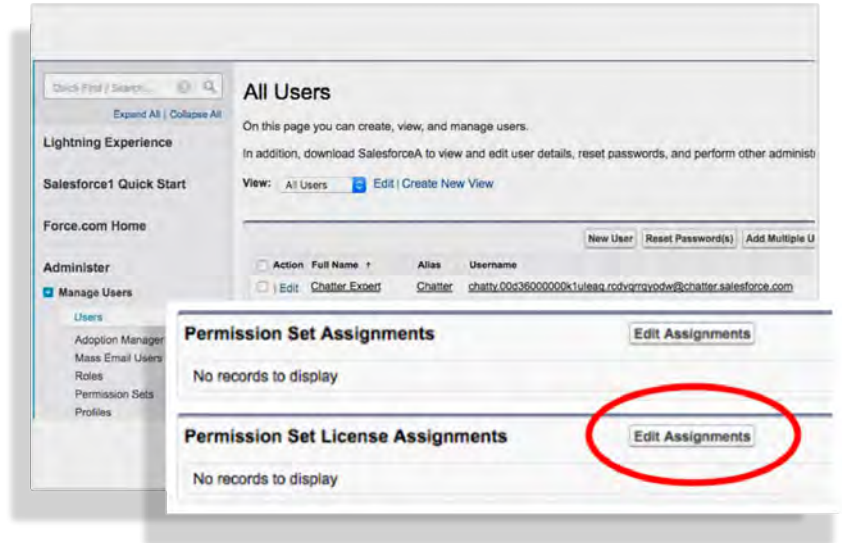


Assign Licenses to Specific Users

01

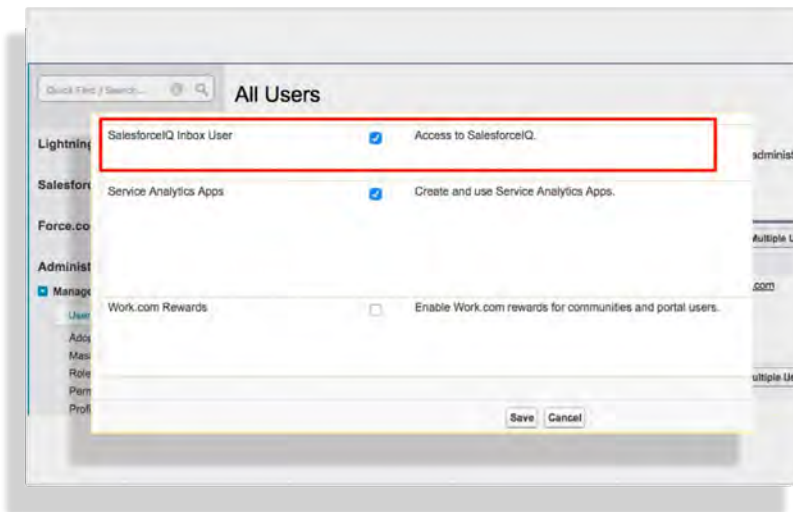
Find and identify the Salesforce users who will be using Salesforce Inbox.

In the upper right corner, select **Setup**. In the left hand panel, select **Administer > Manager Users > Users** to open a User Detail page. Then, select the name of the user you want to assign a license. Under **Permission Set License Assignments**, choose **Edit Assignments**.



02

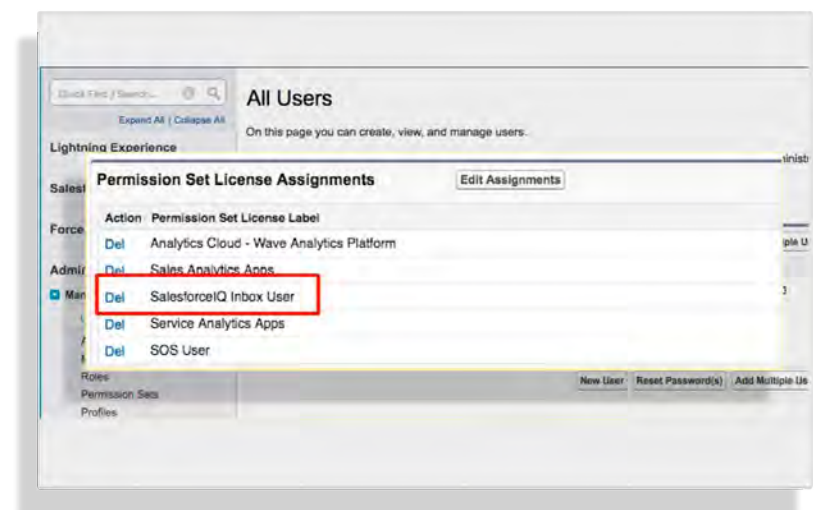
Under **Enabled**, check the box for the Salesforce Inbox User.



03

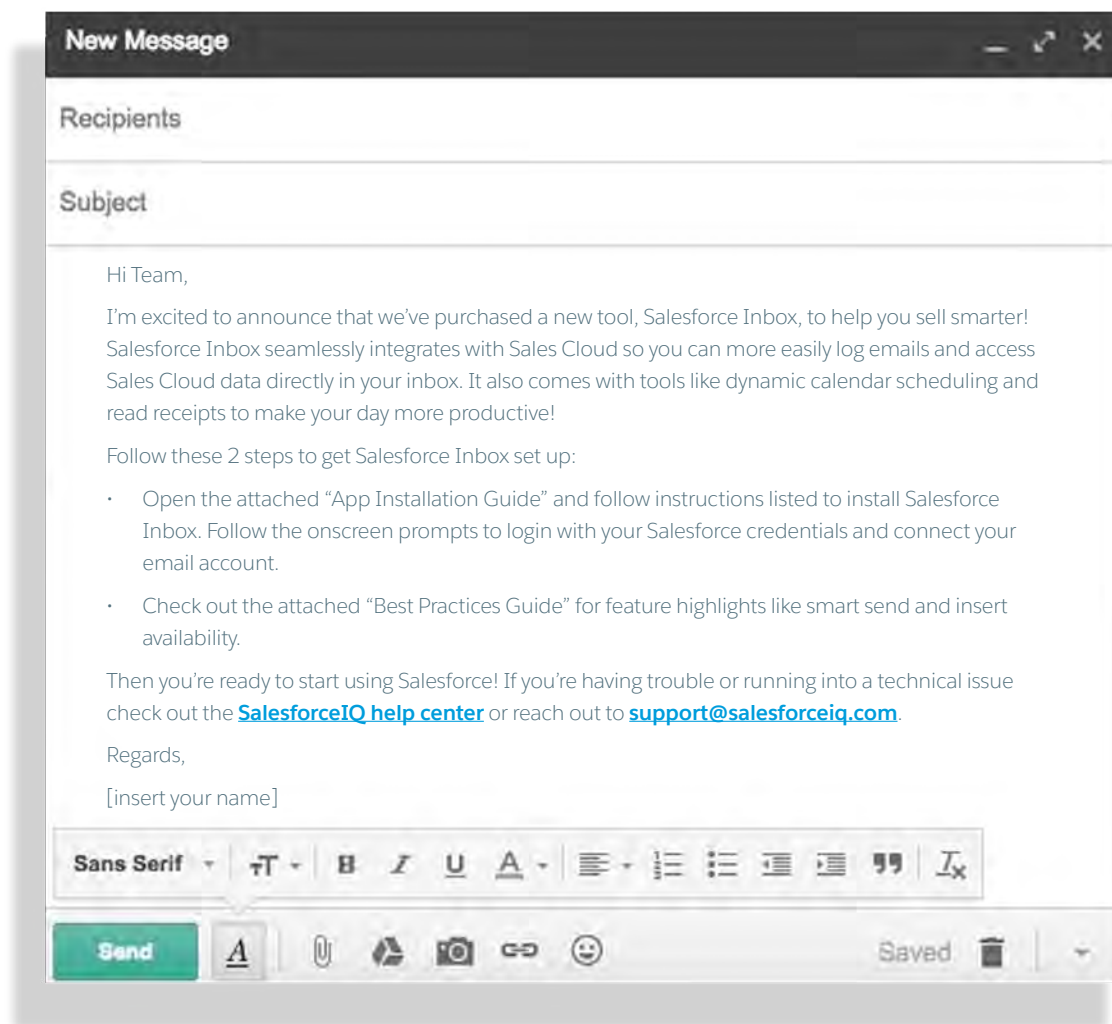
Confirm the Salesforce Inbox User assignments are visible on the User Detail page.

NOTE: You will need to repeat this process for each Salesforce Inbox User in your organization.



Rollout Salesforce Inbox to Your Team

We've made it easy for you to get your team up and running on Inbox! Simply send out our suggested email template below and be sure to attach a copy of the App Installation and Best Practice Guides!



The image shows a screenshot of a 'New Message' email composition window. The window has a dark header bar with the title 'New Message' and standard window controls. Below the header, there are fields for 'Recipients' and 'Subject'. The main body of the email contains the following text:

Hi Team,

I'm excited to announce that we've purchased a new tool, Salesforce Inbox, to help you sell smarter! Salesforce Inbox seamlessly integrates with Sales Cloud so you can more easily log emails and access Sales Cloud data directly in your inbox. It also comes with tools like dynamic calendar scheduling and read receipts to make your day more productive!

Follow these 2 steps to get Salesforce Inbox set up:

- Open the attached "App Installation Guide" and follow instructions listed to install Salesforce Inbox. Follow the onscreen prompts to login with your Salesforce credentials and connect your email account.
- Check out the attached "Best Practices Guide" for feature highlights like smart send and insert availability.

Then you're ready to start using Salesforce! If you're having trouble or running into a technical issue check out the [SalesforceIQ help center](#) or reach out to support@salesforceiq.com.

Regards,

[insert your name]

Below the text is a rich text editor toolbar with various formatting options like font face (Sans Serif), size, bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, quote, and insert. At the bottom of the window, there is a 'Send' button, a 'Save' button, and a 'Saved' status indicator.

Still need help getting your team set up? Contact support@salesforceiq.com.