Contact: Create a contact in Salesforce and from Lightning for Gmail

Overview

In this section, you will find information about how to create a new customer contact in Salesforce and how to create a contact from Gmail or Google Contacts to Salesforce.com.

Concerned profiles:

ALL

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Step By Step

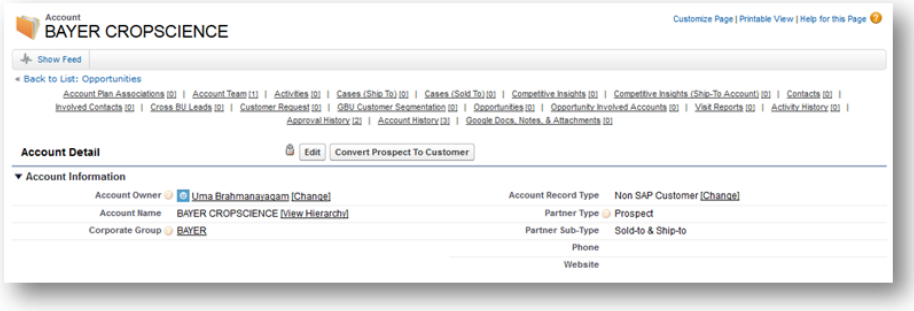
Before creating a contact, search it to avoid creating a duplicate! If a duplicate is created, the system will warn you if:

- the email address is the same than an existing contact
- the name + first name are similar to an existing contact

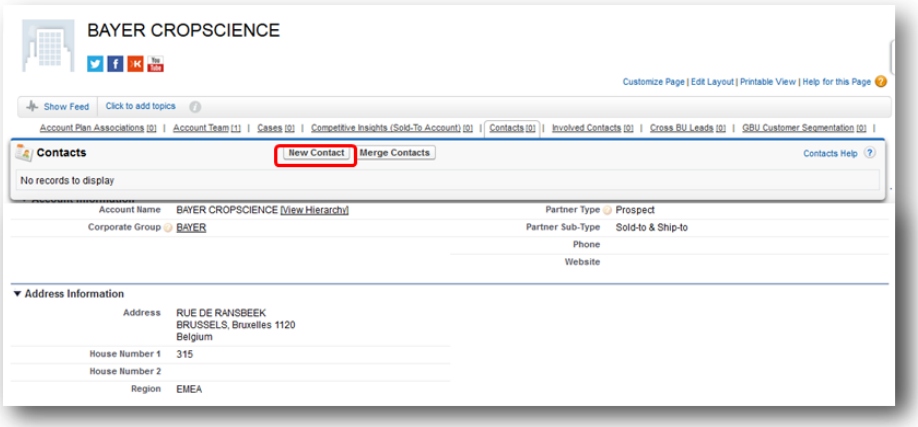
If the Contact does not exist, it is recommended to create it from the account page.

Create a contact in Salesforce

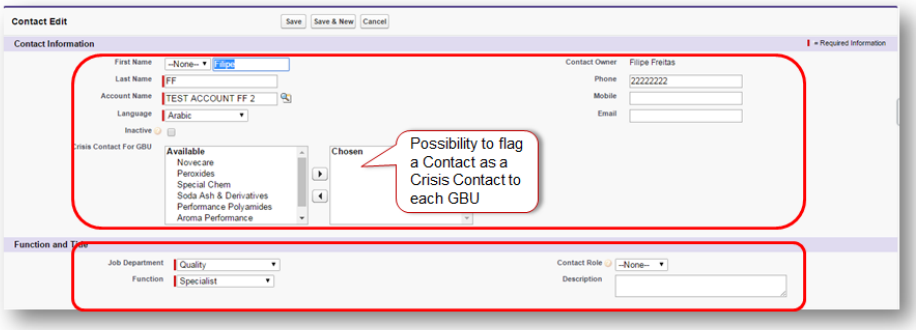
1 If the Contact does not exist, it is recommended to create it from the account page



2 Hoover on “**Contacts**” related list and *click* on New Contact

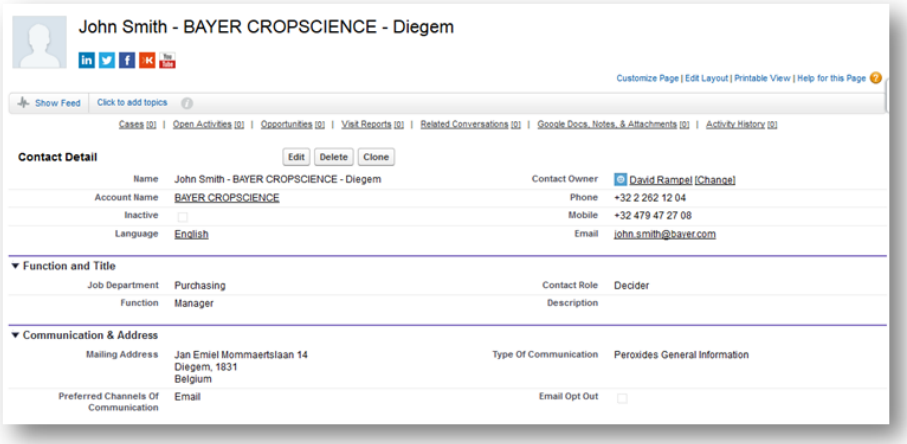


3 Enter your contact's details and Save
•First Name and Last Name
•Account Name: as you started from the account, the field already filled in
•Language
•Phone /Mobile /Email
•Job department and function
•Address: as you started from the account, the address is already filled in

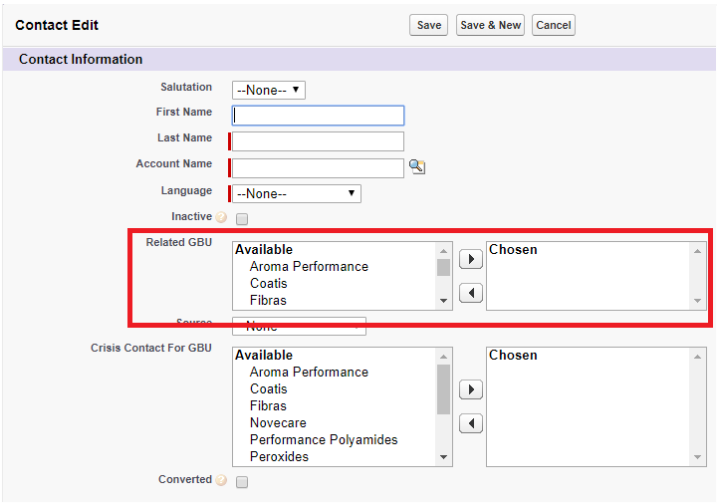
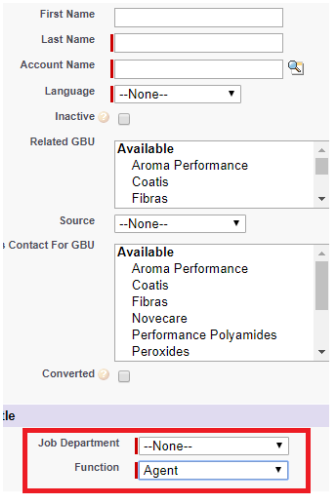


The value "Customer Service" in Job Department **=> New Winter 17' Release**

4 It's done! Your contact is created.



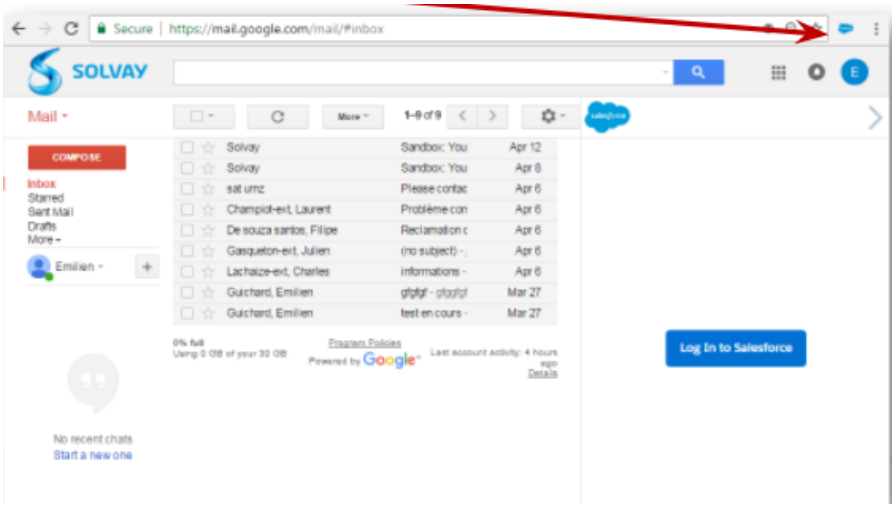
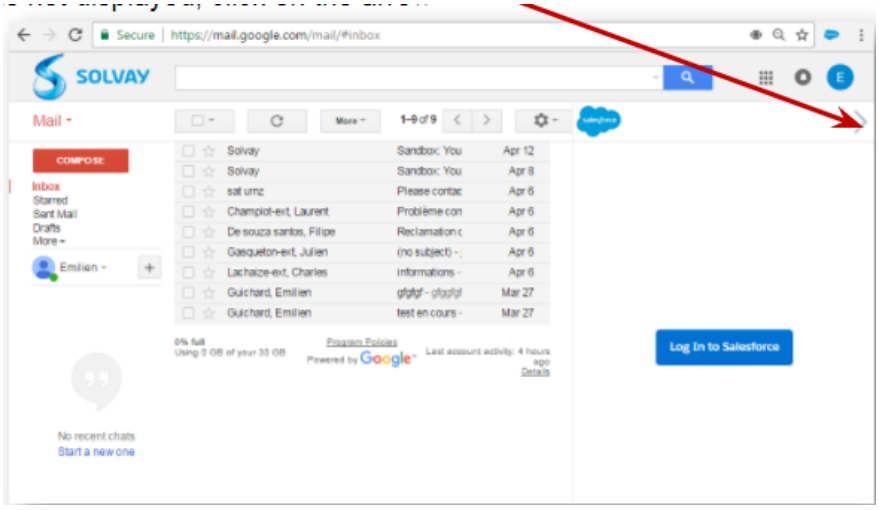
You can create a contact and relate it to any account in Salesforce, even if you're not part of the Account Team

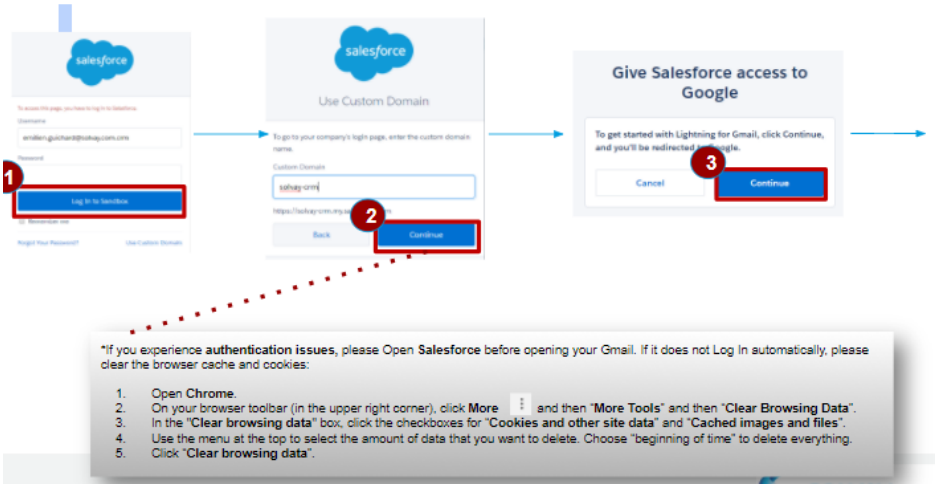
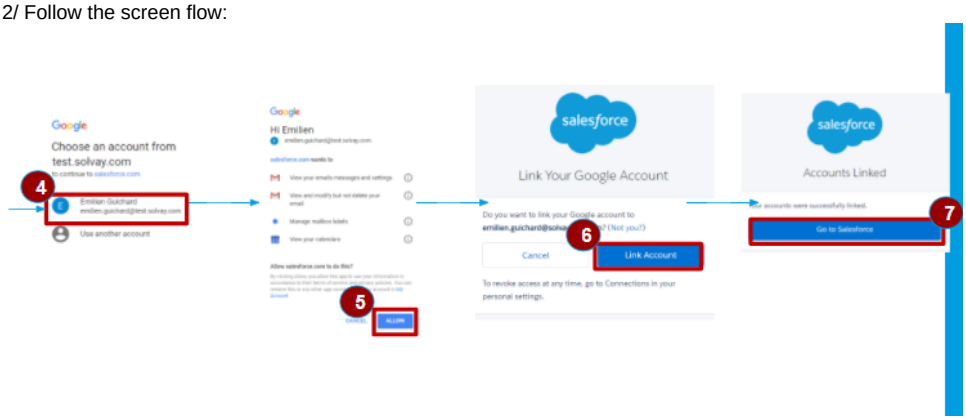
The Field Related GBU has been moved up to get move visibility	
The job Department pick list has been reduced from 18 to 14. Function Pick list has been reduced to 16.	

Create a contact from Lightning for Gmail

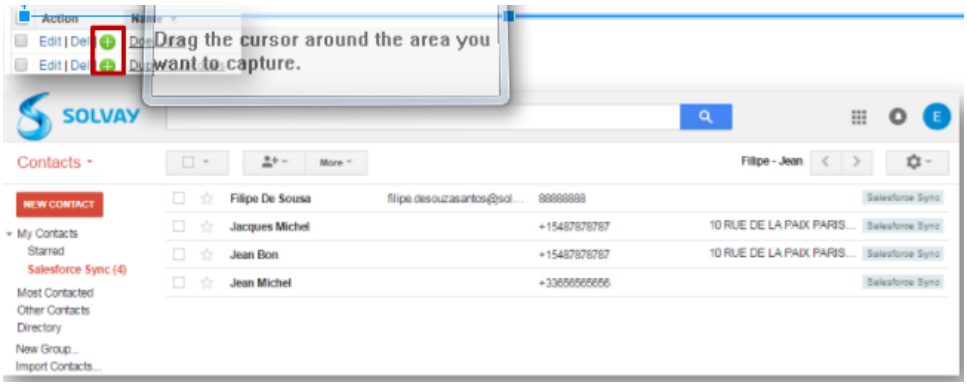
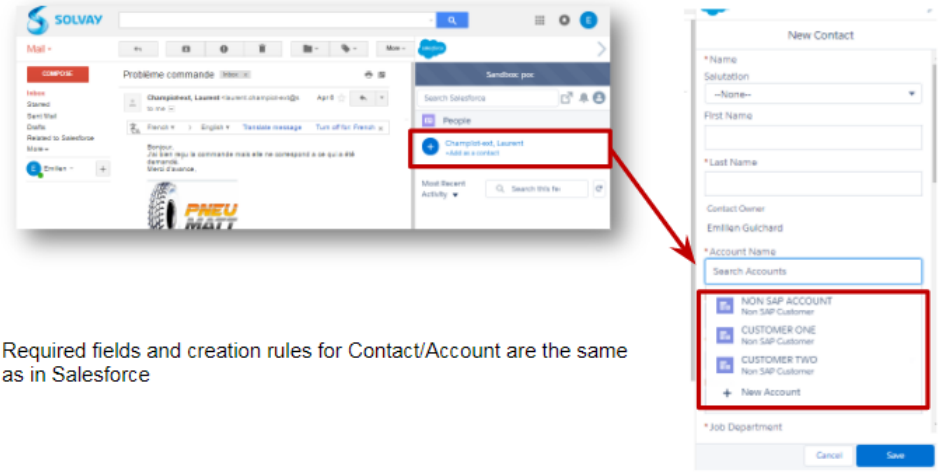
Create a contact from Gmail

	Lightning for Gmail is a solution provided directly from Salesforce (cost included in the licence cost) that provides similar features in a more efficiently way. This feature is only available for full Salesforce licences, not for Community licences.

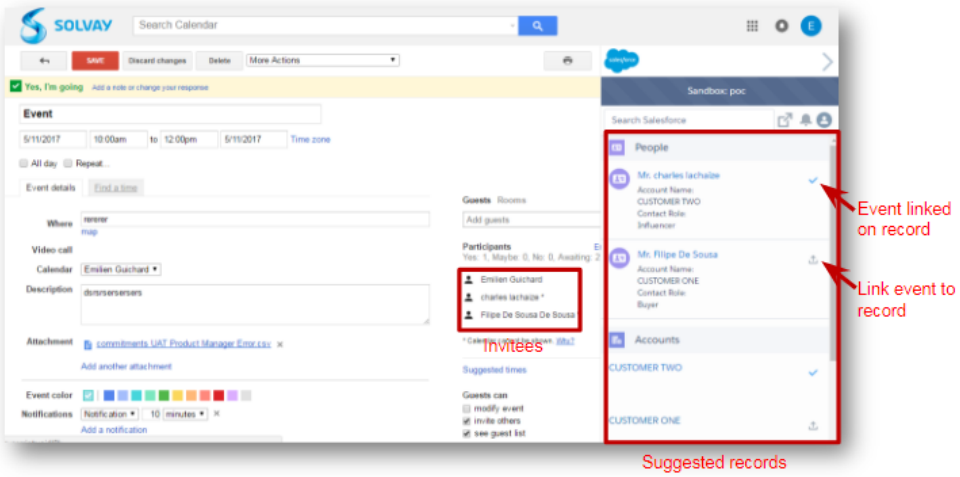
How to install and connect	1/ Go to this link and install the plugin https://chrome.google.com/webstore/detail/salesforce-lightning-for/jjghhkepijgakdammjldcbnjehfkfmha?hl=en-US 2/ You should see the Salesforce logo in the upper right corner of your browser 
Connect to Salesforce 1/ Click on the blue button Log In to Salesforce. If it is not displayed, click on the arrow	

How to install and connect (1/2)	2/ In the popup window, click on the link Use Custom Domain and enter solvay-crm and follow the screen flow: 
How to install and connect (2/2)	2/ Follow the screen flow: 
What you can do with it	<table><tr><td></td><td></td><td></td></tr><tr><td>Contacts sync</td><td>Sync Salesforce contacts owned by the users + followed in Chatter Created in a specific Google Contacts folder “Salesforce Sync” (not mixed with other user contacts)</td><td>Salesforce to Google Salesforce is the reference data</td></tr><tr><td>Contact creation</td><td>Create a new contact in Gmail from email sender information and relate it to an existing account or create a new one</td><td>Google to Salesforce</td></tr><tr><td>Events</td><td>Sync user selected Google Calendar Meetings as Events in Salesforce with invitees list See invitees Salesforce data from the panel Recurring Events are not sync Available or Busy status on events are not sync</td><td>Google to Salesforce Google is the reference data</td></tr><tr><td>Emails</td><td>Emails can be added as Task to up to 2 records related to user that has sent the email (based on the email address)</td><td>Gmail to Salesforce</td></tr><tr><td>See and search records</td><td>See related records (according to selected email) See Chatter activity and collaborate Search and display records (if you are allowed to see in Salesforce) Edit records (if you are allowed to edit in Salesforce) Open records in Salesforce</td><td>Gmail to Salesforce</td></tr></table>

Create a contact from Google Contacts

Contacts sync	All the Contacts that you own in Salesforce and the one you follow on Chatter are synced in a Salesforce Sync folder in Google Contacts  If a contact is updated in Gmail, it is not updated in Salesforce and will be overwritten by Salesforce data (as Salesforce is master) If a contact is updated in Salesforce, it is also updated in Gmail If a contact is deleted in Salesforce, it is not deleted in Gmail If a contact is deleted in Gmail, it is not deleted in Salesforce If a contact is unfollowed in Salesforce, it is not removed in Gmail and not updated again If a contact is changed of owner in Salesforce, it is not removed in Gmail and not updated again
Contact Creation	Create a new contact in Gmail from email sender data Choose either an existing account (you can see) or create a new one  Required fields and creation rules for Contact/Account are the same as in Salesforce

Events

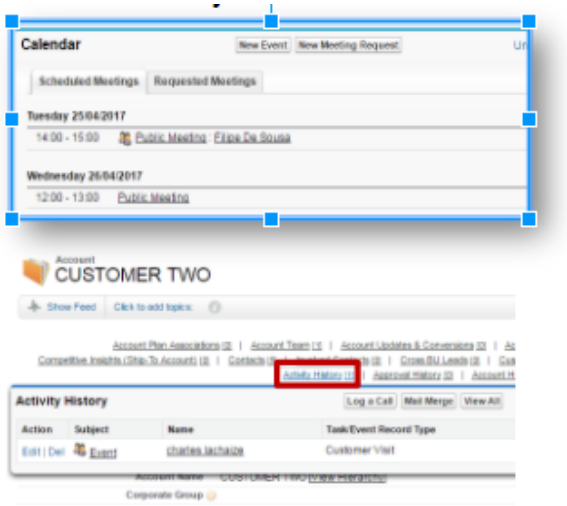


Meetings in Google Calendar can be added as Event in Salesforce on records related to invitees (Contact, Account, Opportunity…) by clicking on the down arrow next to the record

Events are displayed on the home page, in the tab Activities and on the records they are related to.

Event invitees in Salesforce can be either Users or Contacts.

They need to exist in Salesforce to be related to the Event



If the list of invitees is updated in Gmail, it is also updated in Salesforce (remove/add guests)

If the list of invitees is updated in Salesforce, it is not updated in Gmail

If the Event details are updated in Gmail, it is also updated in Salesforce

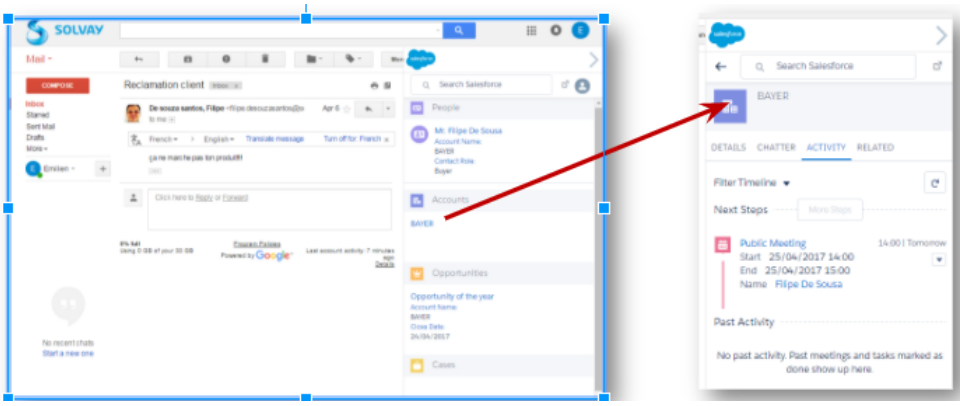
If the Event details are updated in Salesforce, it is not updated in Gmail

If an Event is created in Salesforce, it is not synced back in Gmail

If an Event is deleted in Gmail, it is deleted in Salesforce

Only modifications made by the owner of a meeting in Google Calendar

are taken into account in Salesforce

Create Contacts in Salesforce directly from Gmail In the panel, records associated with the current email sender are displayed (Account, Contacts, Opportunities, Cases…) You can go though the related records and use it to read other related records.	

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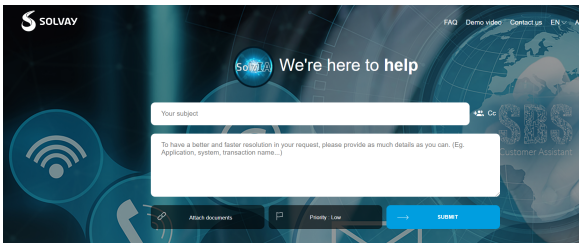
Related articles

- Contact: Involved Contact
- Contact: Link a Product to a Contact
- Contact: Search a Contact

Need help?

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : https://solvia.solvay.com/



you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example