

Installing Veelo for Gmail App

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With Veelo for Gmail, you can **access** and **share** content using your Gmail account, and track how your prospects and customers interact with it.

Key Features

Quickly and easily access your shareable content

Add **trackable links** to your email

Have your sharing activity **automatically logged** to your Salesforce opportunity, contact, or lead

See engagement activity including views, opens and prospect forwards

To use the Veelo for Gmail app you need:

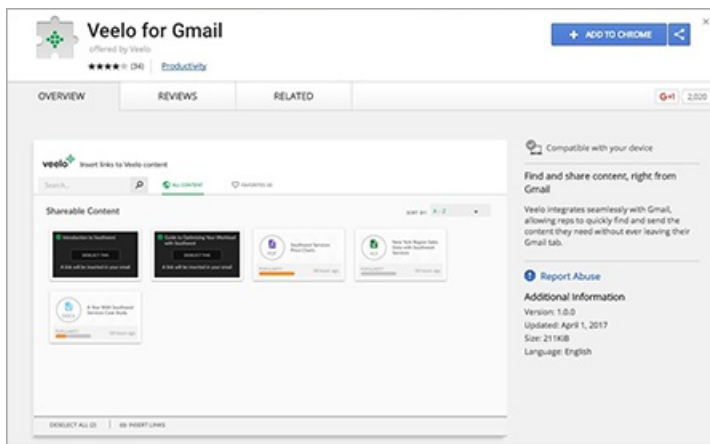
A **Windows** or **Mac** computer

The **Google Chrome** web browser

Step by Step

Find the Veelo for Gmail extension [here](#).

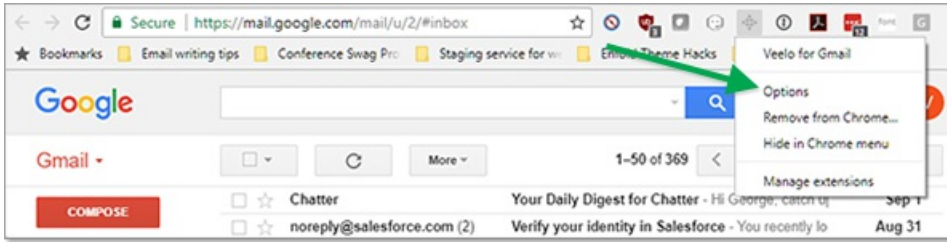
Click the **Add to Chrome** button.



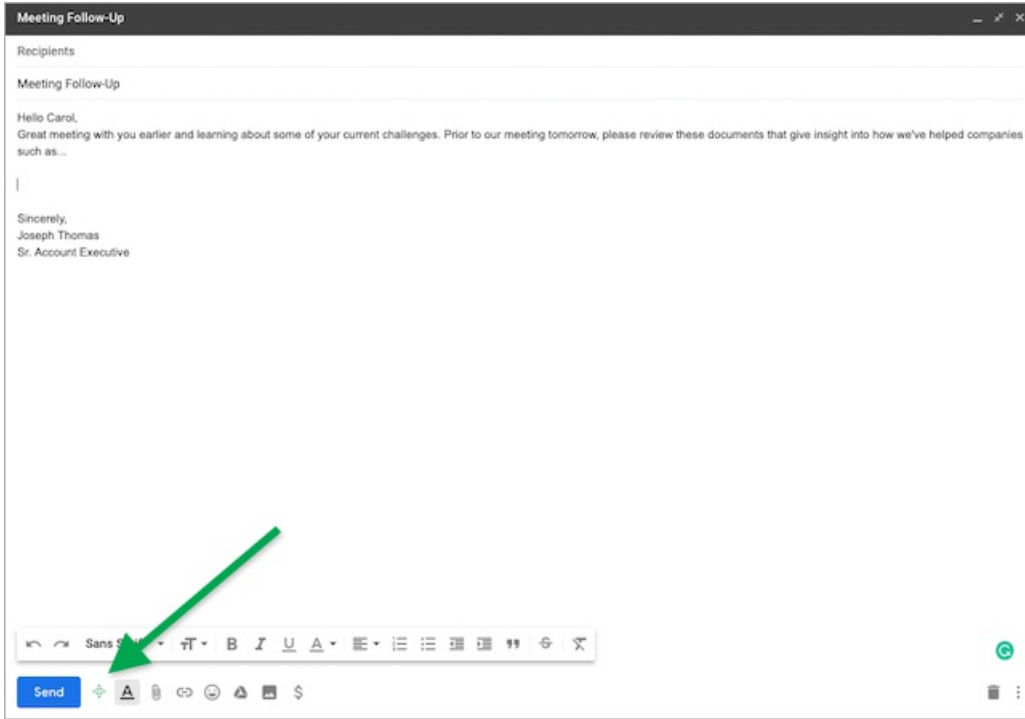
Click the **Add extension** button.

If your company does not have a custom subdomain (i.e., your default login page is <https://home.veeloapp.com>), please skip to the next step. If your company has a custom subdomain, you will need to set it in the Gmail app options.

Click on the Veelo for Gmail app button on the Chrome toolbar, click on Options, and type your URL into the dialog box. If you don't know what your custom domain is, please contact your Veelo administrator to verify. Click **Save Options** when done.



Log in to your Gmail account, and **create a new e-mail**. Click the **Veelo** button at the bottom of the composer window.

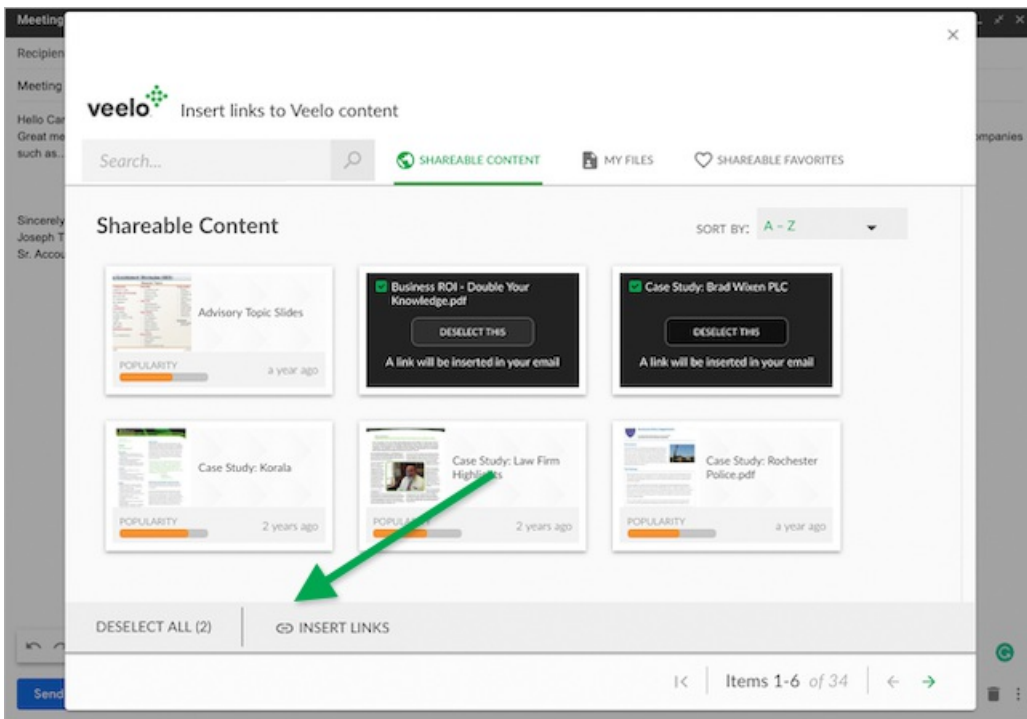


If you are already logged in to Veelo, the system will automatically log you in. If aren't logged in to Veelo yet, you'll be presented with the sign-in screen.



Once you've successfully logged in, you'll see all the shareable content available to you.

Select individual items to share using the checkboxes on the upper left corner, then click on **Insert Links** when done. The share links will be inserted into your Gmail compose window, and you can then customize your email. Send your email as normal when done.



FAQs

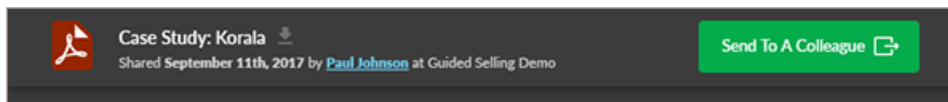
Does Veelo alert me when my prospect views my email?

Yes, you'll receive a notification by email and in the notifications section of the Veelo app in the CRM.

Does Veelo capture forward activity of my audience?

It depends on how your prospect forwards the content you shared.

Every file you share with a prospect has a "Send to a Colleague" button in the top right corner.



If your prospect forwards the file using that button, you will receive a notification that your prospect has forwarded the content, along with the email address of the person they forwarded the content to.

Note that the prospect forwarding feature is available only for files, and doesn't work for training content at this time.

However, if your prospect forwards the content using their email client, you will not receive any additional information. If you are interested in requiring users to enter their information before they access the content you've shared with them, please [contact us](#).

What types of content can I share?

You can share all content types in Veelo.

Does my activity record in Salesforce? How does this work?

Yes, the activity is recorded in Salesforce in the following order of priority:

First, the Opportunity if it has an email associated with the contact.
If no Opportunity exists, then the activity is recorded in the Contact record.
If no Contact record exists, then the activity is recorded in the Lead record.

What happens if I share multiple emails to the same recipient?

If you share multiple emails, Veelo records one sharing activity. This helps keep your reporting clean on the idea the Seller is performing only one action.

Can I limit downloads?

No, not at this time.

Can I limit how or if my audience forwards my email?

No, not at this time.
