

Gmail



Gmail Integration	
Capability	Description
View Records	View matching contacts, leads, accounts, and other Salesforce records within Gmail
Relate Emails	Relate emails to Salesforce records from Gmail
Search	Search for records and create records directly from Gmail
Use Enhanced Email	Save emails in Salesforce as EmailMessage records instead of Task records

Gmail Integration with Inbox [Ⓢ]

Capability	Description
Relate Emails	Use all the Gmail integration features and relate emails to custom records from the related records list
Schedule	Automate meeting scheduling and schedule emails to send later
Track	Track emails and links

Lightning Sync

Capability	Description
Integrate	Integrate Salesforce with Microsoft® or Google™ email and calendar applications
Sync Records	Sync contacts and events from email application to Salesforce, Salesforce to the email application, and both ways
Sync Specific Events	Sync both private and deleted events
Sync Event Series	Sync event series in Lightning Experience and the Salesforce app
Relate Synced Items	Automatically relate synced events to Salesforce records so that those events are available in reporting and other Salesforce platform capabilities

Einstein Activity Capture [Ⓢ]

Capability	Description
Integrate	Integrate Salesforce with Microsoft® or Google™ email and calendar applications
Sync Records	Sync contacts and events from email application to Salesforce and both ways
Sync Specific Events	Sync both private and deleted events
Relate Emails	Automatically associate emails and events with related account, contact, contract, lead, opportunity, and quote records in Salesforce
Relate Synced Items	Automatically relate synced events to Salesforce records so that those events are available in reporting and other Salesforce platform capabilities

Outlook



Outlook Integration	
Capability	Description
View Records	View, edit and add Salesforce records directly in Outlook
Relate Items	Associate emails and events to Salesforce records
Relate Events	Relate calendar events being attended or organized by the user
Use Enhanced Email	Save emails in Salesforce as EmailMessage records instead of Task records

Outlook Integration with Inbox [Ⓢ]

Capability	Description
Relate Emails	Use all the Outlook integration features and relate emails to custom records from the related records list
Schedule	Automate meeting scheduling and schedule emails to send later
Track	Track emails and links

*Salesforce for Outlook [Ⓢ] *Not available for new organizations

Capability	Description
Sync Records	Sync contacts, events, and tasks between the desktop-based version of Outlook and Salesforce
Relate Emails	Relate emails to the Salesforce records of the user's choice
View Related Records	View related Salesforce records, like leads, contacts, tasks, and opportunities
Add Items to Contacts	Add Outlook emails, attachments, events, and tasks to multiple Salesforce contacts

Emails from Salesforce



Send Through Salesforce	
Capability	Description
Send Email	Send email using the Salesforce servers without integrating with an external email service
Monitor Emails	Monitor emails sent from Salesforce using email logs
Use Bounce Management	Use bounce management for emails that are rejected by recipient email servers

Send Through Gmail or Office 365

Capability	Description
Send Email	Send email from Salesforce using Gmail or Office 365 accounts
Use Gmail or Office 365	Make emails look like they were sent from users' Gmail or Office 365 accounts
View Recipients' Emails	View the emails sent by recipients in the Gmail or Office 365 'Sent Items' folder

Send Email Through Email Relay

Capability	Description
Send Email	Use the company's SMTP server to send email from Salesforce
Store Emails	Store emails locally to meet compliance goals, and prevent the appearance of email spoofing
Scan Outbound Emails	Use antivirus software to scan outbound emails before they're sent to customers
Apply Content Filters	Apply content filters to email messages
Append Data	Add company-wide disclaimers to email messages

Send from the User Interface

Capability	Description
Send Email from a record	Send an email and optional attachment from a record page
Send List / Mass emails	Send an individual copy of an email to a group of people
Send Campaign Email	Send a mass email to campaign members (limits apply)

Send from Automation Tools or Apex

Capability	Description
Use Automation Tool	Automatically send email using an automation tool like Workflow Rule, Flow or Process Builder
Use Apex Code	Use Apex code to send individual and mass email using Apex classes
Define Custom Criteria	Send emails to Salesforce users based on custom logic

Mobile



Inbox for iOS & Android [Ⓢ]	
Capability	Description
Log Emails	Log emails to Salesforce records and custom objects from an IOS or Android device
Create & Manage	Create Salesforce records and manage Salesforce tasks
Track & Schedule	Track and schedule emails, and automate other compose activities

Emails to Salesforce



Email to Salesforce

Capability	Description
Capture Emails	Capture emails sent with applications such as IBM® Lotus Notes® and Microsoft® Outlook® and with webmail such as Gmail® and Yahoo! Mail®
Relate Emails	Automatically relate emails sent from external email applications to Salesforce contacts, leads, opportunities, or specific Salesforce records using the record ID in the subject / body
Specify Address	Enter the 'Email to Salesforce' address in the BCC field to relate an email to records, and enter the email recipients in the To and CC fields
Assign Unresolved Items	Assign records that are added to 'My Unresolved Items' to related Salesforce records

Email-to-Case

Capability	Description
Convert Emails into Cases	Turn emails sent by customers into case records in Salesforce
Use On-Demand Email-to-Case	Use On-Demand Email-to-Case by utilizing Salesforce Apex Email Services to keep email traffic outside the network's firewall and refuse emails larger than 25 MB
Use Email-to-Case	Use the regular Email-to-Case by utilizing an agent on the local machine to keep email traffic inside the network's firewall and accept emails larger than 25 MB

Email Handler

Capability	Description
Process Incoming Emails	Use Apex code to listen for and process incoming emails to a specific address
Implement an Interface	Use an Apex class that implements the Messaging.InboundEmailHandler interface to handle an inbound email message
Create or Update Records	Create or update records based on the content of incoming emails