

Elements.cloud Training & Setup

All Salesforce users should have a license to Elements.cloud. This tool allows users to see embedded content in Salesforce (business and system process maps, how-to's, links to external documentations, notes, etc.) through a 'purple dot' at the top of the record page or on a field.

This is a Note that opens on the Account purple dot when you click "Segment Field".

[Screen Shot 2022-12-01 at 2.23.50 PM.png](#)

It also allows users to "Leave Feedback". For example - you think there are too many fields on the Lead page layout? Let us know! Leave us feedback by opening a Lead record and clicking "Leave feedback" so we can help make the user experience better.

[Screen Shot 2022-12-01 at 2.22.05 PM.png](#)

Please watch this [Elements.cloud training video](#) in Gong for an overview of the following:

- What is Elements.cloud?
 - What can it do for me?
- How to leave feedback regarding Salesforce
- Getting setup with Elements.cloud
 - Download [Chrome extension](#)
 - Pin to taskbar
 - Log out of Salesforce
 - Log back into Salesforce
 - Check extension - do you still a prompt to login to Salesforce?
 - If NO --> you are setup! Double check by opening a record in Salesforce and checking for the purple dots
 - If YES --> submit a ticket for assistance

NOTE - if you cannot access the video in Gong, please see [this Slack thread](#) for the training video.

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