



WalkMe Extension Sample Email for Salesforce

Overview

Your Account Manager will provide you with a link to download the WalkMe extension. Just send an email to your users with a link – below you will find a template email we’ve created for you! The email template includes easy, step-by-step directions for your users to download the extension in just a couple of minutes. This email can be sent by anyone in your organization.

Email Template

Dear XXX,

Using Salesforce has now become even easier! Get the help you need, exactly when you need it, with WalkMe, an intelligent platform that will guide you through Salesforce. Beginning today, use WalkMe to receive step-by-step instructions and guidance directly from your Salesforce opportunity. With WalkMe, you now have the answers you need at your fingertips.

What is WalkMe?

- Provides step-by-step instructions directly in the Salesforce environment, making complex processes simple and easy to navigate
- Anticipates your needs and provides help exactly where it is needed
- Can be engaged whenever you need it

How do I get started?

To use WalkMe, you must install a browser extension.

Download HERE <-Insert Customer Extension Link

Once WalkMe has been installed, you can launch it any time within Salesforce by simply clicking the widget. It can also be launched via context-sensitive buttons on Opportunities and Accounts.