

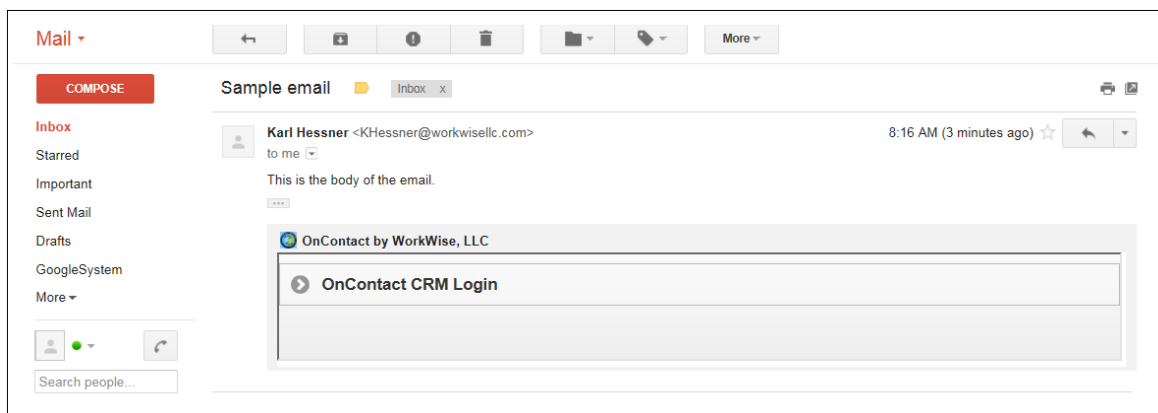
Overview

OnContact integration with Gmail is accomplished with a Google Gadget that is displayed in the Email form. This gadget lets you create CRM activities from emails and related them to new or existing CRM contacts.

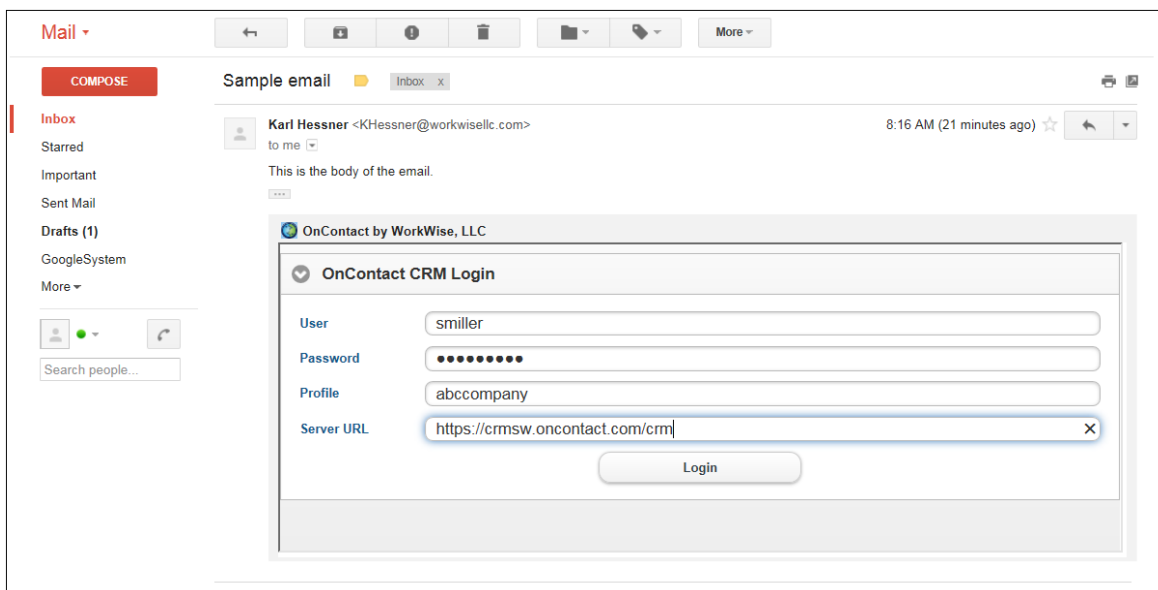
IMPORTANT: The Gmail Gadget is intended for corporate accounts and is only visible in your email form when enabled by your Google Apps Domain Administrator.

Logging In

In order to use the gadget, you must first log into the CRM application. Open any email and expand the Login section to enter your credentials.

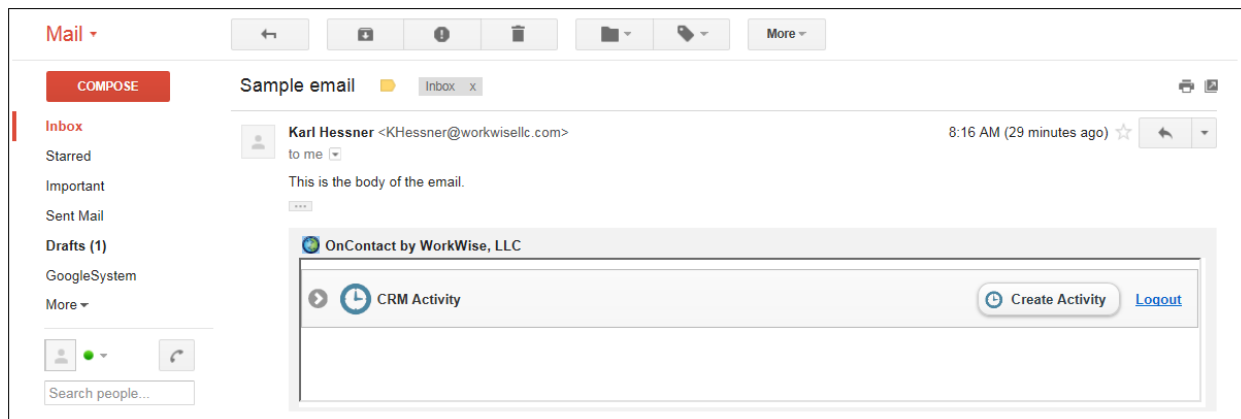


Credentials are entered in the same manner as they are for other OnContact applications. The server URL is remembered so it only needs to be entered once.

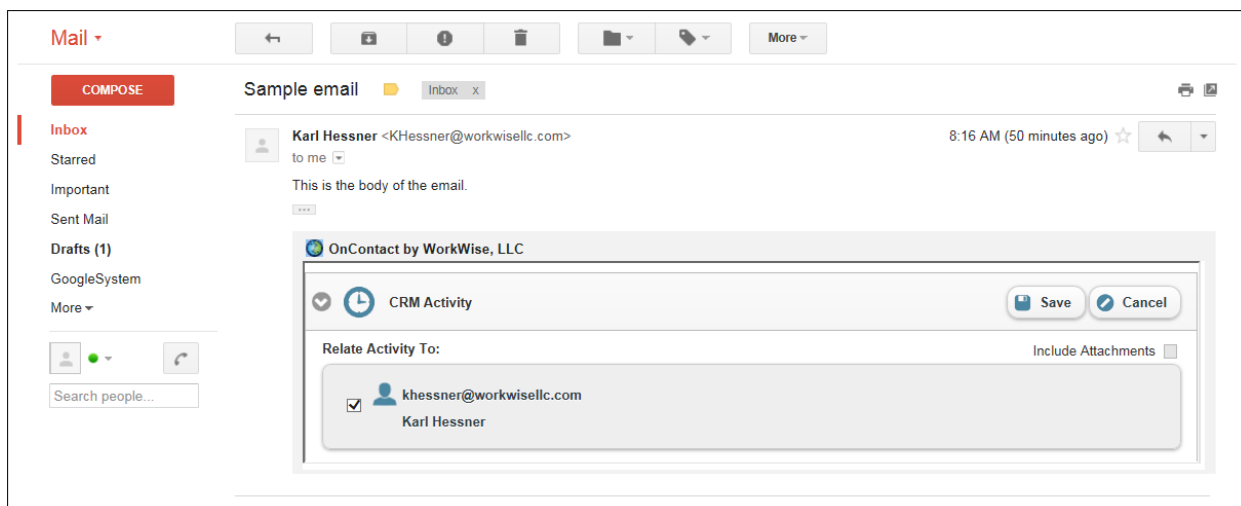


Recording Emails

Once you are logged into OnContact CRM, the gadget displays information related to a CRM activity. If no activity has been created for the opened email, the gadget shows a button titled Create Activity. Press this button to create a new activity from the email.



When the *Create Activity* button is pressed, the application attempts to associate CRM contacts and companies to the email. This is accomplished by searching for email addresses in CRM that match the ones in the From, To and CC fields of the email. For each match, a contact or company row is displayed in the gadget. Each row is preceded by an image indicating what type of record was found.

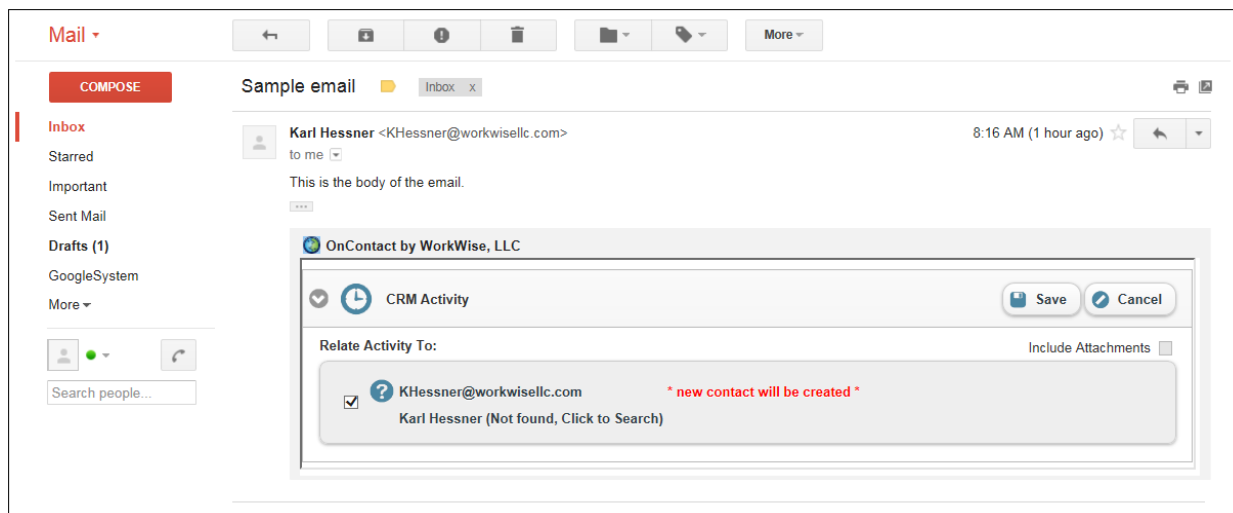


The checkbox in front of each row indicates that you would like to relate the CRM activity to the contact or company. In many cases, when emails are sent to a one person, only one contact will be listed here.

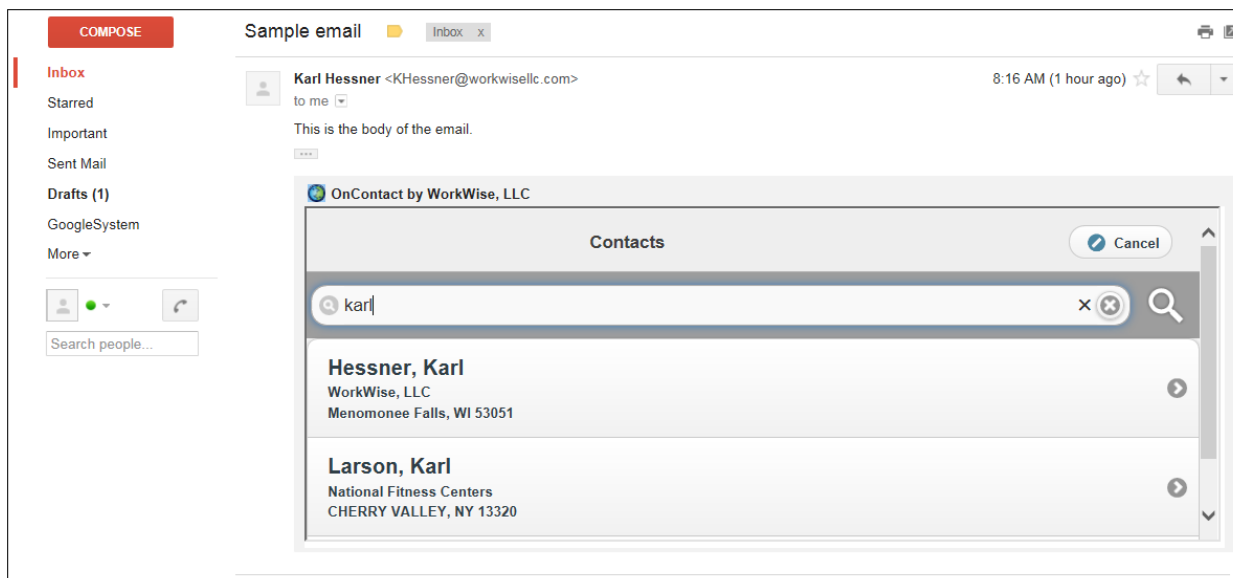
Rows for which no contact or company was found are preceded with the image of a question mark. There are three possible courses of action for unresolved rows. First,

you may choose to do nothing by leaving the preceding checkbox unmarked, and those rows will be skipped when the activity is created.

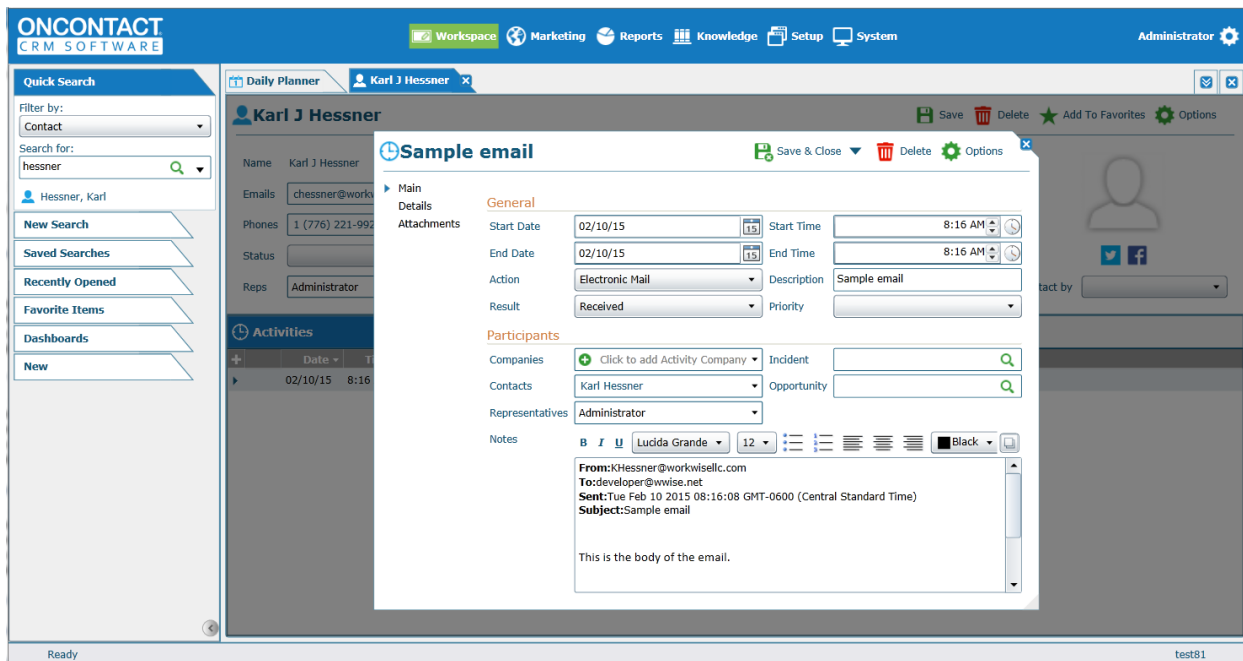
When the checkbox is marked for an unresolved row, a new CRM contact will be created and relate to the activity. The new contact is created with as much information that can be gathered from the Google contact record, such as First and Last names, and email address.



The final option is to select an existing contact for the unresolved row. This option may be used when you know the contact exists in CRM but not match was found by email address. To initiate a search, click on the *(Not found, Click to Search)* hyperlink. This opens a page to search for contacts. A contact selected from the *Search* page is related to the new activity.



Once contacts are properly related to the email item, press the *Save* button to create the new CRM activity. An activity created from an email includes the subject as the description. The notes of the activity include the To, CC, and From information as well as the body of the email.



If a CRM activity has already been created for an email opened in Gmail, you may click the *Open Activity* button displayed in the gadget to open CRM and retrieve that activity. You may also expand this section in the gadget to display information about the activity, like the description and name of the related contact.

