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## Gmail Add-On Installation and Setup

1. Log into Gmail, click Get Add-Ons in the Sidebar and search for OnContact CRM For Gmail.  
Note: The OnContact add-on is also available from G Suite.
2. There are two install options:
  - a. Domain Install – The Gmail add-on can be made available to some, or all Gmail users in your Domain (see notes below).
  - b. Individual Install – The Gmail add-on will only be available for your Gmail login.

### **Notes regarding Domain Install**

There are two options when our add-on is installed into the Domain by a Domain Administrator:

1. Install for all users.
2. Install for only my account.

A Gmail administrator can install the add-on for all users at once.

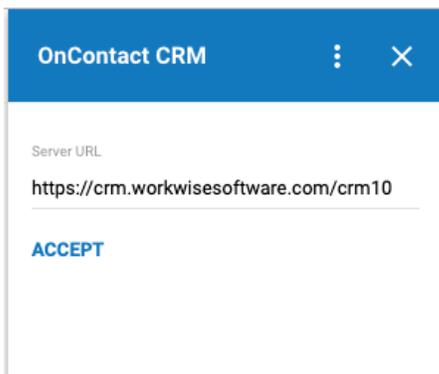
If there is a Domain policy in place restricting available add-ons, the Gmail admin will have to allow the OnContact add-on.

## Using the Gmail Add-On

1. Log into Gmail and click any email in your Inbox.
2. Click the OnContact CRM icon on the sidebar to the right.
3. If this is your first time logging in, click the More Actions menu and choose the Show Base URL option.

The Server URL field should contain the same address used to connect to OnContact CRM with the browser, minus the index.html part.

**Hosted Customers should use:** <https://crm.workwisesoftware.com/crm10> (see example below)



OnContact CRM

Server URL

<https://crm.workwisesoftware.com/crm10>

ACCEPT

**If you are hosting your own CRM (i.e. on-premise), contact your CRM administrator for the correct URL.**

Hint: It will most likely be the same URL used to log into the main CRM application.

For example, if your regular CRM URL is something like this,  
<https://mycompany.oncontact.com/index.html>, you should use this URL for the Gmail add-on:  
<https://mycompany.oncontact.com/>

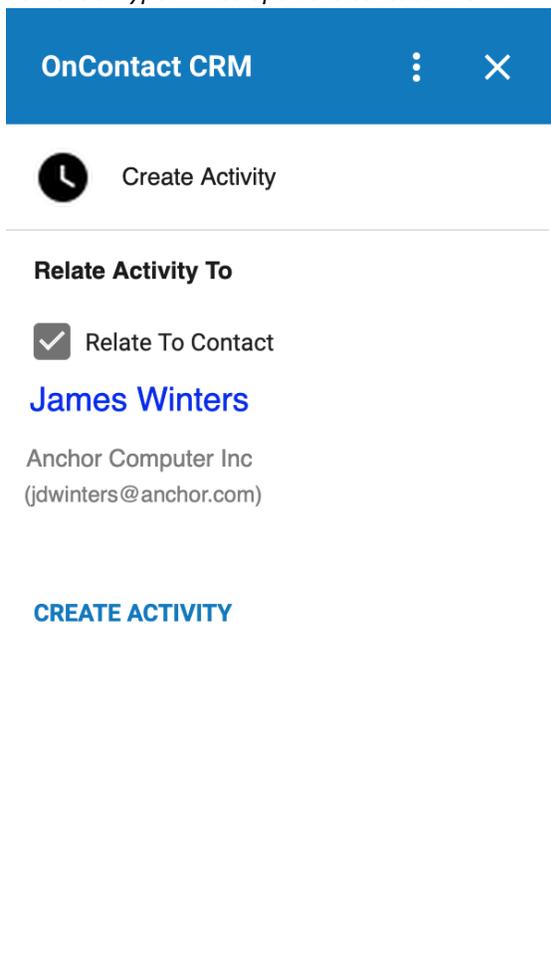
4. Click Accept.
5. Click the Log In button.
6. Type in your CRM User Name, Password and Profile. These will be the same as logging into OnContact CRM. Check the Remember Me checkbox if you would like the add-on to remember your login information.

## Create a CRM Activity From an Email

7. To log emails in CRM, open an email and click Create Activity on the right Sidebar. OnContact will look for a Contact based on the email address of the sender. If a match is found, the Activity record is connected to the correct Contact/Company record in OnContact. If a match is not found, a new Contact may be added, or a search done for an existing Contact.

**Contact Found in CRM**

Contact Full Name, email address and primary company are displayed.  
Name is a hyperlink to open the contact in CRM.



The screenshot shows a sidebar window titled "OnContact CRM" with a close button (X) and a menu icon (three dots). Below the title bar, there is a "Create Activity" button with a clock icon. Underneath, the section "Relate Activity To" contains a checked checkbox next to "Relate To Contact". Below this, the name "James Winters" is displayed in blue, indicating it is a hyperlink. Underneath the name, the text "Anchor Computer Inc" and the email address "(jdwinters@anchor.com)" are shown. At the bottom of the sidebar, there is a "CREATE ACTIVITY" button.

**Contact Not Found in CRM**

Contact will be created if the checkbox next to the Contact Name is checked.

Name is not a hyperlink.

OnContact CRM

Create Activity

**Relate Activity To**

Heather Berry (hberry@jacobson.com)

New Contact will be created

**CREATE ACTIVITY**

8. Click Create Activity to log the email in OnContact.

If the email already has an Activity attached to it, links are provided to open the related Activity, Contact and Company in CRM.

**Email With Existing Activity**

*Activity, Contact Name and Company Name are hyperlinks.*

The screenshot shows a window titled "OnContact CRM" with a close button (X) and a menu icon (three dots). Below the title bar, there is a section labeled "Activity" with a clock icon. Underneath, the text "Activity" is followed by a blue hyperlink "03/22/2019 11:45 AM - Test Email". Below that, the text "Contact" is followed by a blue hyperlink "Tracy Aimes". Finally, the text "Company" is followed by a blue hyperlink "Glacier Laboratories".