

Google Apps:

Agile CRM integrates with different google apps seamlessly and lets customers to sync their contacts & calendar between their Google and Agile accounts. Here's how you can enable your Google Apps in Agile CRM.

Contacts Sync

1. Go to Preferences

Go to the preferences page and locate the Google Contacts Sync under the 'Google Apps' tab. Click on the 'Enable' button to enable contacts sync.

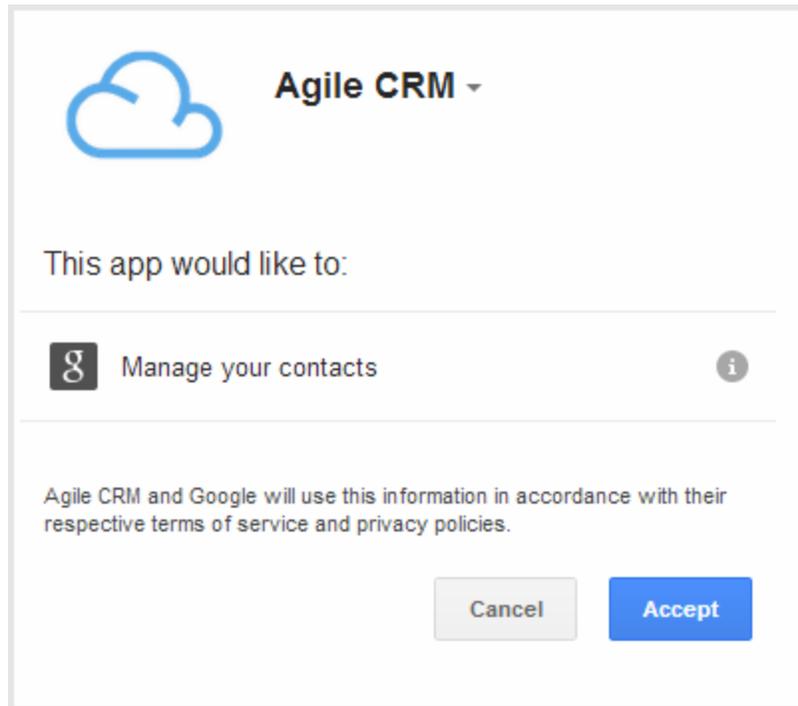
Preferences

The screenshot shows the 'Preferences' page with a navigation bar at the top containing: Personal Settings, Email, Email Templates, Notifications, Widgets, and Google Apps (which is selected). Below the navigation bar, there are three main sections:

- Google Contacts Sync:** Features a header with a contacts icon and the Google logo. The text reads: "Agile can periodically sync your contacts in your CRM with your Google Contacts." At the bottom is an "Enable" button.
- Google Calendar Sync:** Features a header with a calendar icon and the Google logo. The text reads: "By enabling access to your Google Calendar, we'll automatically sync your events in your Google Calendar with Agile calendar. You can also setup Agile calendar inside Google." At the bottom is an "Enable" button.
- Google Mail/Apps:** Features a header with the text "Google Mail/Apps" and a red envelope icon. Below the icon is the text "Allow access here".

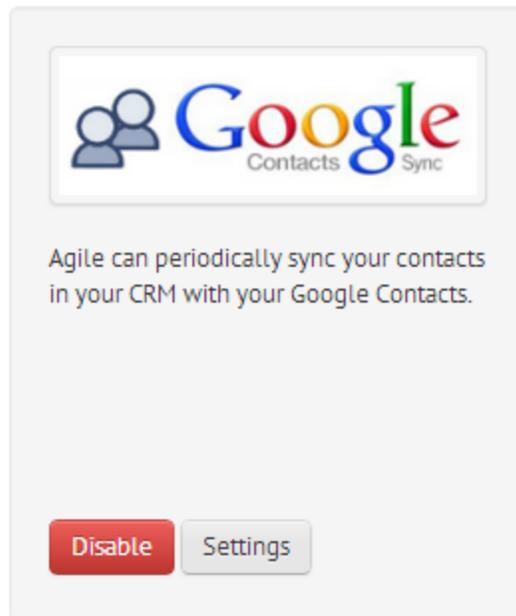
2. Authorize

Sign In to the Google account you want to sync contacts with and authorize access to Agile.



3. Go to Settings

Go to 'Settings' to Customize and Enable Google Contacts Sync in Agile CRM.

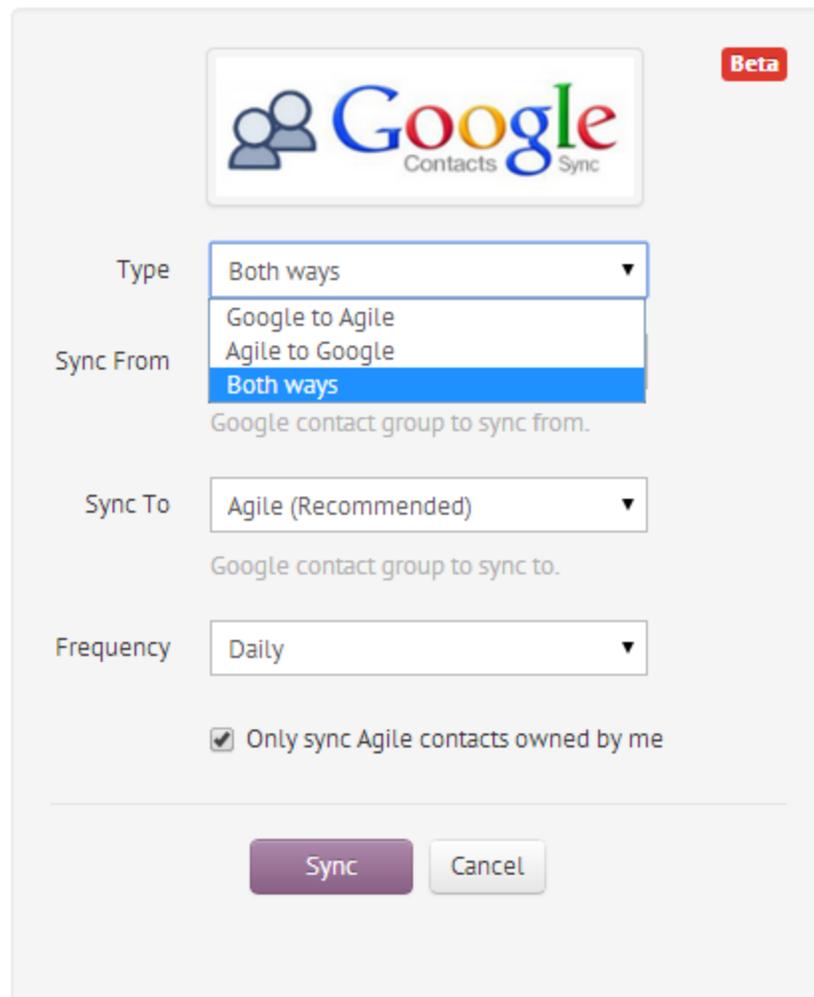


4. Customize & Enable

Customize your settings to suite your needs. Here is the list of settings that are available for you to customize:

1. Type: Allows you to decide which way you want the contacts to sync from. Agile to Google, Google to Agile or Both ways.
2. Sync From & Sync To: Select the folder you want to sync contacts from(Google or Agile) and the folder you want the contacts sync to(Agile or Google).
3. Frequency: Select the frequency of the sync. The available options are to Sync Only once, Daily, Weekly or Monthly.

Check the box to sync if you want to sync only the contacts that you own in Agile. Uncheck to sync all the contacts irrespective of the owner of the contact.



The image shows a settings dialog box for Google Contacts Sync. At the top left is the Google Contacts Sync logo, and at the top right is a red 'Beta' badge. The settings are as follows:

- Type:** A dropdown menu set to 'Both ways'.
- Sync From:** A dropdown menu with 'Both ways' selected. Below it is the text 'Google contact group to sync from.'
- Sync To:** A dropdown menu set to 'Agile (Recommended)'. Below it is the text 'Google contact group to sync to.'
- Frequency:** A dropdown menu set to 'Daily'.
- Only sync Agile contacts owned by me

At the bottom are two buttons: 'Sync' (purple) and 'Cancel' (grey).

5. Agile can now periodically sync your contacts in your CRM with your Google Contacts.

Calendar Sync

Now keep all your calendars in sync and do not miss out any important meetings or events. Sync your Agile calendar with Google calendar and always stay notified of your meetings and tasks wherever you are.

	Sun 3/23	Mon 3/24	Tue 3/25	Wed 3/26	Thu 3/27
all-day					
10am			10:00 - 11:00 Breakfast at Mark's		
11am					
12pm		12:00 - 1:00 Call Steve			
1pm					



By enabling access to your Google Calendar, we'll automatically sync your events in your Google Calendar with Agile calendar. You can also setup Agile calendar inside Google

March 2014	GMT+05:30
S M T W T F S	8am
23 24 25 26 27 28 1	9am
2 3 4 5 6 7 8	10am
9 10 11 12 13 14 15	11am
16 17 18 19 20 21 22	12pm
23 24 25 26 27 28 29	1pm
30 31 1 2 3 4 5	2pm
	3pm

My calendars:
 Other calendars:
 Add a coworker's calendar
 Contacts' birthdays a...
 Holidays in India
 Agile Calendar

iCalendar Feed URL

Subscribe to your events
<webcal://our.agilecrm.com/backend/ical/pmtn8ks3kh81adn45ut5cs65e9>

Adding to Google Calendar:

1. Copy the above iCalendar webcal link.
2. Log into your Google Calendar and select **Add by URL** from the menu within **Other calendars**.
3. Paste the Calendar feed URL into the box provided and click on **Add Calendar**

Once you have completed these steps it may take few minutes for your events to appear in your Google Calendar.

Adding to Outlook 2007 or Later:

1. Click the link for the Internet Calendar Subscription.
2. At the prompt, click **Launch Application**.
3. Outlook opens with a prompt, **Add this Internet Calendar to Outlook and subscribe to updates**, click **Yes**.

The Calendar is added to Calendar view under **Other Calendars**.

Send Calendar Feed URL via Email

1. Go to Preferences

Go to the preferences page and locate the Google Calendar Sync under the 'Google Apps' tab. Click on the 'Enable' button to enable calendar sync.

Preferences

Personal Settings Email Email Templates Notifications Widgets Google Apps



Agile can periodically sync your contacts in your CRM with your Google Contacts.

Enable



By enabling access to your Google Calendar, we'll automatically sync your events in your Google Calendar with Agile calendar. You can also setup Agile calendar inside Google

Enable



Allow access here

2. Authorize

Sign In to the account you want to sync calendars with and authorize access to Agile for calendar sync.



Agile CRM ▾

This app would like to:

-  Manage your calendars i

Agile CRM and Google will use this information in accordance with their respective terms of service and privacy policies.

Cancel **Accept**

3. By enabling access to your Google Calendar, we'll automatically sync your events in your Google Calendar with Agile calendar.

Gmail Sync

View all your email conversation between you and the contact in one place. Integrate your Gmail with Agile with just a click.



Nicolas Woirhaye
co-founder chez IKO System


Score²
50

★★★★☆
 Actions

Owner: Patrick 

Early Adopter   Add tags

Timeline Notes Tasks Deals Cases Campaigns Web Stats **Mail**

 **How do I use the Campaigns feature?** 

Hi Patrick,
I love Agile sofar. Its brilliant.
Wanted to understand more about Campaigns feature.
I want to score my leads whenever they open my emails or visit my website. Is that possible? ...
[a day ago](#)

 **Re: How do I use the Campaigns feature?** 

Hi Nicolas,
Yes, Absolutely. In the campaigns visual designer, you have options to check if user clicks on email links. You can use the Score option there.
You have option in our JavaScript API to score leads based on their actions on your website or ...
[a day ago](#)

1. Go to Preferences

Go to the preferences page and go to the 'Email' or 'Google Apps' page to link your Gmail account to Agile.

Preferences

Personal Settings | **Email** | Email Templates | Notifications | Widgets | Google Apps

Link your Email Account

Google Mail/Apps



Allow access here

Or

IMAP

Email *

Server (Host) *

Preferences

Personal Settings | Email | Email Templates | Notifications | Widgets | **Google Apps**



Agile can periodically sync your contacts in your CRM with your Google Contacts.

Enable



By enabling access to your Google Calendar, we'll automatically sync your events in your Google Calendar with Agile calendar. You can also setup Agile calendar inside Google

Enable

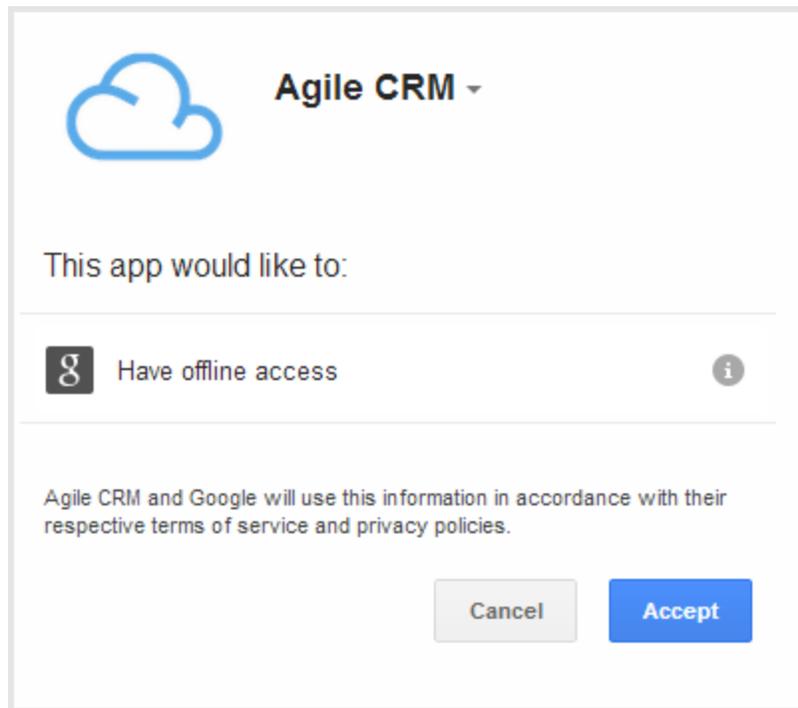
Google Mail/Apps



Allow access here

2. Authorize

Sign In to the account you want to sync your gmail with and authorize access to Agile for 2-way email.



Google Widget

Manage your contacts directly from Gmail. Now find out everything about a contact like notes, campaigns he has been a part of, cases, tags directly from your Gmail.

The screenshot shows an email from Gordon Agile (<gmatthew@agilecrm.com>) sent at 6:17 AM (12 hours ago). The email content includes a greeting "Hi Vince," a positive review of the Agile CRM interface, and a thank you note. Below the text is an embedded AgileCRM widget titled "AgileCRM - Sell & Market like Fortune 500". The widget features a search bar with "Gordon Agile (gmatthew@agilecrm.com)" selected, a profile card for "Gordon Matthew" with a "Score" of 0 and an "Actions" menu (containing "Add Note", "Add Task", "Add Deal", and "Add to Campaign"), and a "Notes" tab showing a "Demo-call" event with a "Normal" priority, scheduled for "about 19 hours ago" and "less than a minute ago".

1. Install the Plugin from Marketplace

Go to Google Marketplace and search for Agile CRM plugin and install the plugin into your Google domain administrator account.



Marketplaces

Google Apps

2. Link your Agile CRM account.

Open any mail and provide your Agile CRM domain name and associate your account and give access to Agile CRM to link your Agile CRM widget to Gmail.

Note: If you domain name is 'enmarkit' then fill the text field with 'enmarkit' only and click on 'Associate'.



where/when will I see the Google gadget and landing pages online? Is the content already done?

With our new site shaping up, I need to look at it once before I can visualize the final shape.

Thanks.

AgileCRM - Sell & Market like Fortune 500

Associate your account - one time setup

.agilecrm.com

Associate

 **Agile CRM** ▾

Agilecrm.com would like to:

-  View your email address 
-  View basic information about your account 

Agilecrm.com and Google will use this information in accordance with their respective terms of service and privacy policies.

Cancel **Accept**

Google Docs

Agile keeps all your important documents and files that are related to your contacts in one place easily.

<input type="checkbox"/>	Title	Related To	Uploaded Date
<input type="checkbox"/>	NDA Uploaded Doc ↗		
<input type="checkbox"/>	Setup Guide Google Drive ↗	 	<u>21 days ago</u>

Attach your docs to a contact or a deal either by uploading the document directly from your computer or linking the file from your google drive.

+ Add Document X

Title *

Choose Document *

 My Computer  Google Drive

Related To

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