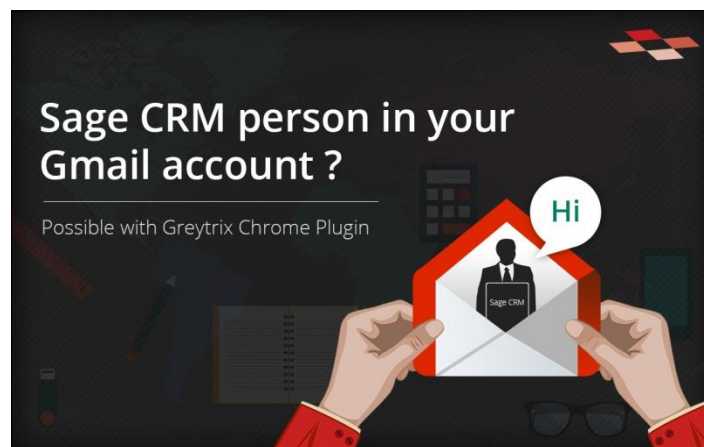


## Gmail Chrome Extension for Sage CRM User Guide

Works with both Sage CRM (all versions) on premises (Desktop)  
and Sage CRM Cloud



*Updated 11th March, 2016*

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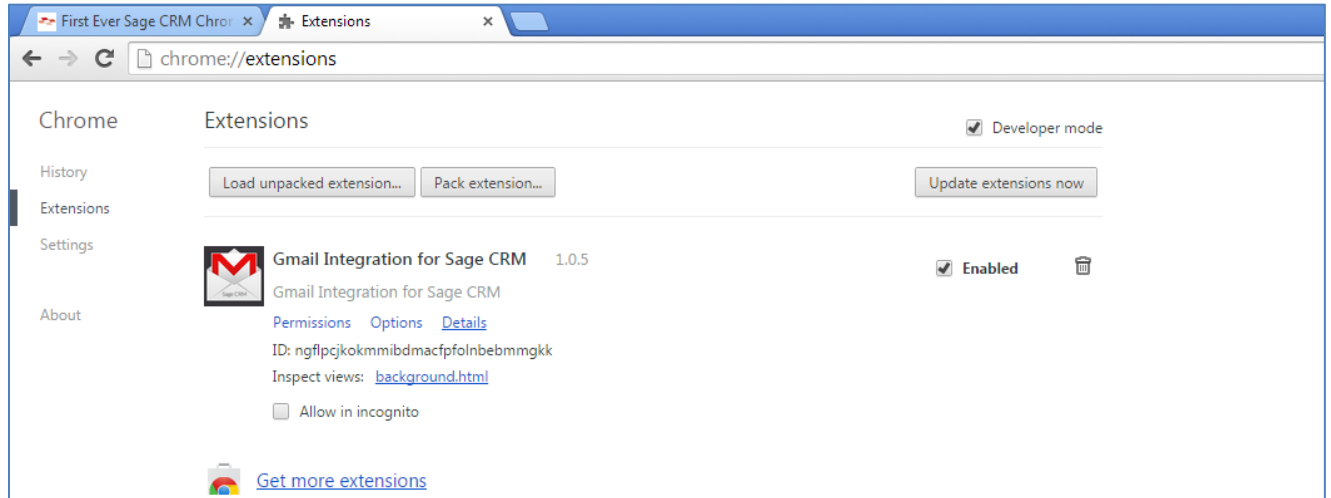


## 1. Installation Instructions:

You can download this extension from Chrome Web store.

<https://chrome.google.com/webstore/detail/gmail-integration-for-sag/ngflpcjkkokmmibdmacpfolnbebmmgkk?hl=en-US1>

After completing installation of plug-in go to `chrome://extensions` in chrome. The Extension will appear as shown in below screenshot.



Click on the Options Button to enter the connection details of Sage CRM.

### Gmail Chrome Extension - SAGE CRM Configuration

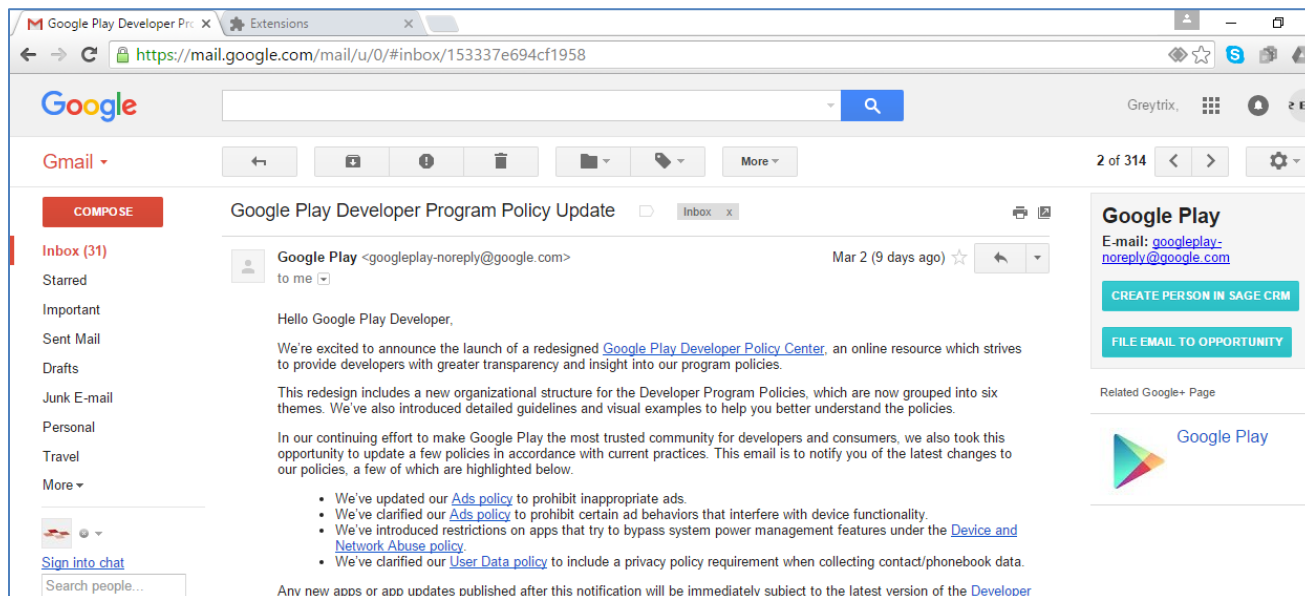
<b>User Name:</b> <input type="text" value="admin"/>	<b>Password:</b> <input type="password"/>
<b>On Premises:</b> <input checked="" type="checkbox"/>	
<b>SSL:</b> <input type="checkbox"/>	
<b>Server Name:</b> <input type="text" value="grey058"/>	<b>Instance Name:</b> <input type="text" value="crmfst"/>
<input type="button" value="Save"/> <input type="button" value="Reset"/>	

If you are using desktop (on premises) Sage CRM then choose option **On Premises**, For Cloud Sage CRM keep unchecked **On Premises** option. If your Sage CRM is secure than choose **SSL** option.

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## 2. How It Works:

Open Gmail. Refresh the page if it's already open. Open any email now, a new panel will appear at the right side of the screen as shown below-



The screenshot shows a Gmail interface with a browser window. The address bar shows the URL <https://mail.google.com/mail/u/0/#inbox/153337e694cf1958>. The Gmail header includes the Google logo, a search bar, and the user name 'Greytrix'. Below the header, there are navigation icons and a 'Gmail' dropdown menu. The main content area shows an email from 'Google Play' with the subject 'Google Play Developer Program Policy Update'. The email body contains the following text:

Hello Google Play Developer,

We're excited to announce the launch of a redesigned [Google Play Developer Policy Center](#), an online resource which strives to provide developers with greater transparency and insight into our program policies.

This redesign includes a new organizational structure for the Developer Program Policies, which are now grouped into six themes. We've also introduced detailed guidelines and visual examples to help you better understand the policies.

In our continuing effort to make Google Play the most trusted community for developers and consumers, we also took this opportunity to update a few policies in accordance with current practices. This email is to notify you of the latest changes to our policies, a few of which are highlighted below.

- We've updated our [Ads policy](#) to prohibit inappropriate ads.
- We've clarified our [Ads policy](#) to prohibit certain ad behaviors that interfere with device functionality.
- We've introduced restrictions on apps that try to bypass system power management features under the [Device and Network Abuse policy](#).
- We've clarified our [User Data policy](#) to include a privacy policy requirement when collecting contact/phonebook data.

Any new apps or app updates published after this notification will be immediately subject to the latest version of the [Developer](#)


On the right side of the email, there is a 'Google Play' sidebar with the following information:

**Google Play**  
E-mail: [googleplay-noreply@google.com](mailto:googleplay-noreply@google.com)

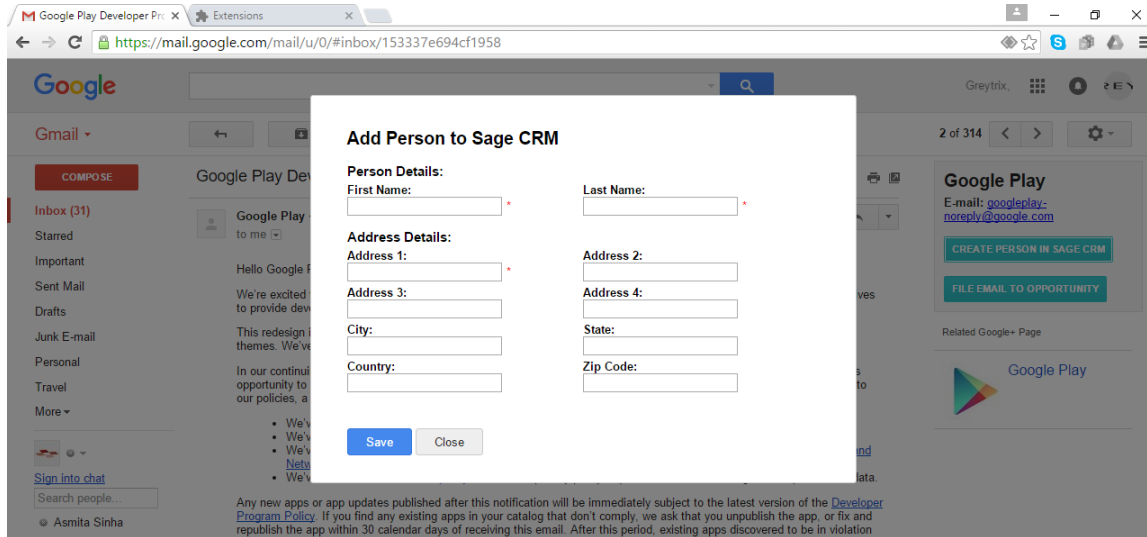
[CREATE PERSON IN SAGE CRM](#)

[FILE EMAIL TO OPPORTUNITY](#)

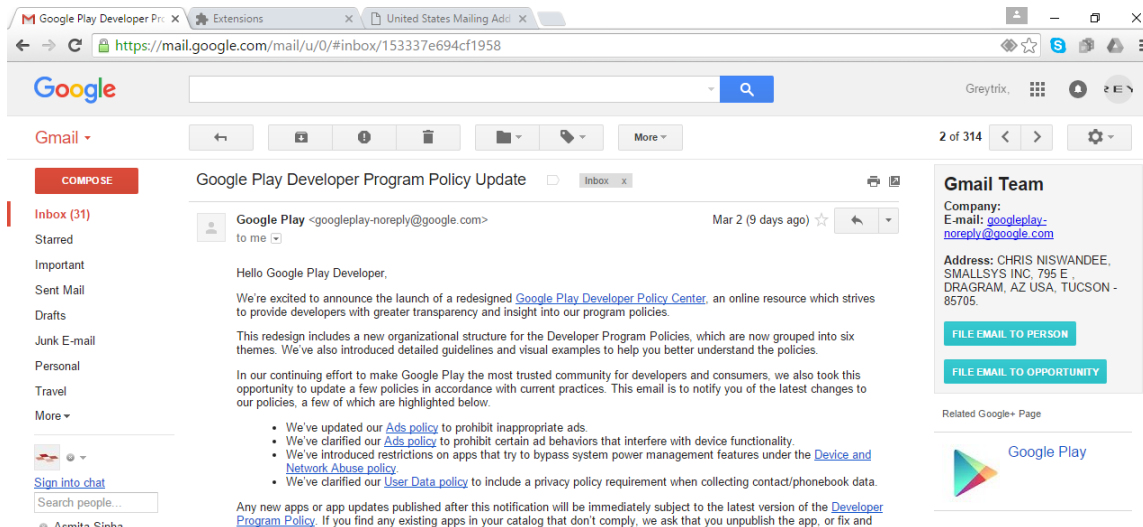
Related Google+ Page

 [Google Play](#)

Click on **“SEND TO SAGE CRM”**. It will show the below screen to enter the Person details.

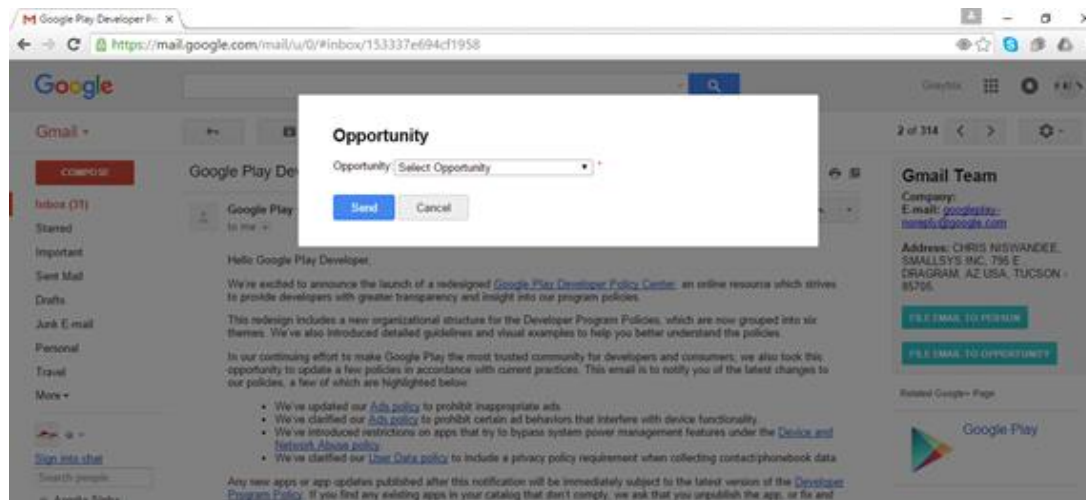


The details of the Person and **“FILE EMAIL TO PERSON”** button will appear, if the person’s email address matches with email address of mail. Gmail users can create communication against persons and opportunity using **“FILE EMAIL IN SAGE CRM”** and **“FILE EMAIL TO OPPORTUNITY”** button respectively.



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Click on “FILE EMAIL TO OPPORTUNITY” to save email against opportunity. After click on button opportunity list will be shown, user can select opportunity and click on save button to file an email to CRM against opportunity.



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