**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.
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.

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.
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.

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

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.
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

**Link your Email Account**

<table>
<thead>
<tr>
<th>Google Mail/Apps</th>
<th>IMAP</th>
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<tbody>
<tr>
<td>Allow access here</td>
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<tr>
<td>Email *</td>
<td>Email</td>
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<td></td>
<td>Server (Host) *</td>
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<td></td>
<td>Server name</td>
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</table>

### Preferences

**Google Mail/Apps**

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

- Enable

- 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.

![Agile CRM Authorization]

This app would like to:

- Have offline access

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

[Cancel]  [Accept]
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.

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.
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’.
Google Docs

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

<table>
<thead>
<tr>
<th>Title</th>
<th>Related To</th>
<th>Uploaded Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>NDA</td>
<td>[Profile]</td>
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<td>Setup Guide</td>
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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.

Title

Setup Doc

Choose Document

My Computer

Google Drive

Related To

Sebastien Tremblay