# MAXIMIZER®CRM GMAIL ADD-ON

The **MAXIMIZER**CRM add-on for Gmail helps you manage and track conversations by saving email interactions with your contacts or leads in **MAXIMIZER**CRM. The add-on also enables you to save emails to both Customer Service and Opportunity records in **MAXIMIZER**CRM

You can also create, search, and update any of your **MAXIMIZER**CRM Address Book, Leads, Customer Service, or Opportunity records from within the add-on. Check out the app in the Google Workspace Marketplace by following the link to **MAXIMIZER**CRM for Gmail listing.

## Features

The following are a list of features and actions that are currently supported by the Gmail add-on.

**SAVE EMAILS TO**
Company
Individual
Contact
Lead
Customer Service

**CREATE NEW RECORDS**
Company
Individual
Contact
Lead
Customer Service
Opportunity
Task

**SEARCH & UPDATE RECORDS**
Company
Individual
Contact
Lead
Opportunity
Customer Service

**UPDATE EXISTING RECORDS**
Company
Individual
Contact
Lead

## Gmail Setup & Authentication

This document provides a step-by-step guide for setting up and authenticating your **MAXIMIZER**CRM and Gmail accounts. The information in this guide should complement any main **MAXIMIZER**CRM documentation.
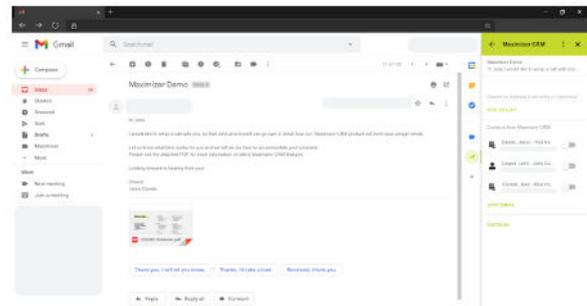
**Step 1**

Login to **MAXIMIZER**CRM and navigate to the App Directory page. Select the "Gmail" App and click on the "Get it Now" button.
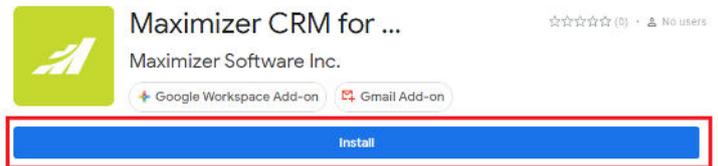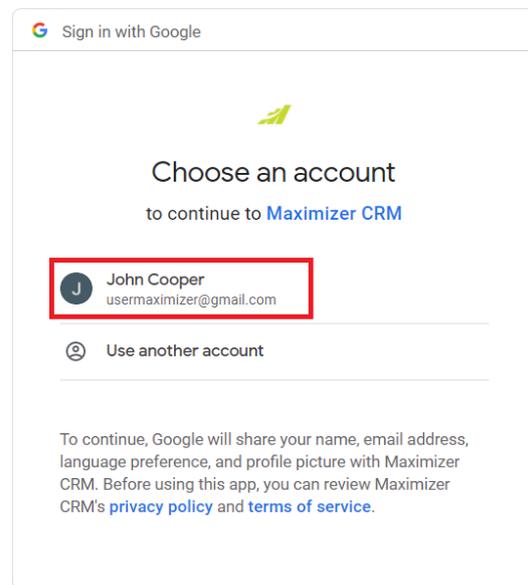
**Step 2**

You should be redirected to **MAXIMIZER**CRM add-on page in the Google Workplace Marketplace. Click on the "Install" button to get the add-on installed to your Gmail Account.

**Step 3**

If you are not already logged into you Gmail account, Google will prompt you to login.

The add-on will request permission to install, click on the "Continue".
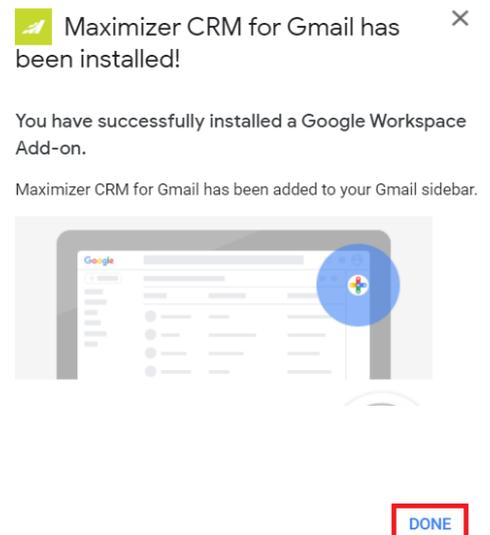
## Step 4

Choose the Gmail account where you would like the addon to be installed, and click on "Allow" button to grant permissions for MAXIMIZERCRM to access your Gmail account.

**Maximizer CRM** wants to access your Google Account

J  usermaximizer@gmail.com

This will allow Maximizer CRM to:

M  View your email messages when the add-on is running  ⓘ

M  Run as a Gmail add-on  ⓘ

▶  Connect to an external service  ⓘ

▶  View your country, language, and timezone  ⓘ

**Make sure you trust Maximizer CRM**

You may be sharing sensitive info with this site or app. Learn about how Maximizer CRM will handle your data by reviewing its **terms of service** and **privacy policies**. You can always see or remove access in your **Google Account**.

**Learn about the risks**

Cancel                                    **Allow**

## Step 5

Click on "Done" button and open your Gmail account in a new window.

Maximizer CRM for Gmail has been installed!                              ✕

You have successfully installed a Google Workspace Add-on.

Maximizer CRM for Gmail has been added to your Gmail sidebar.

**DONE**

**Step 6**

From your Gmail account, navigate to the add-ons bar on the right-hand side and click on the **MAXIMIZER**CRM logo.
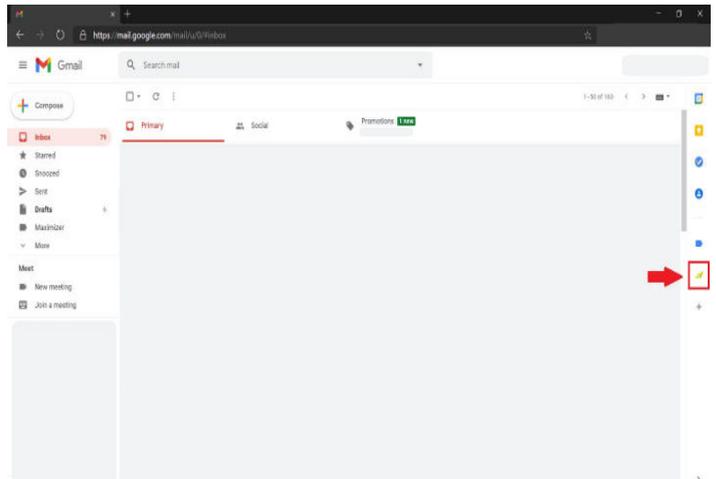
**Step 7**

The **MAXIMIZER**CRM add-on will open and requests you to sign in to your **MAXIMIZER**CRM Live account. Click on 'Connect to Maximizer' button.
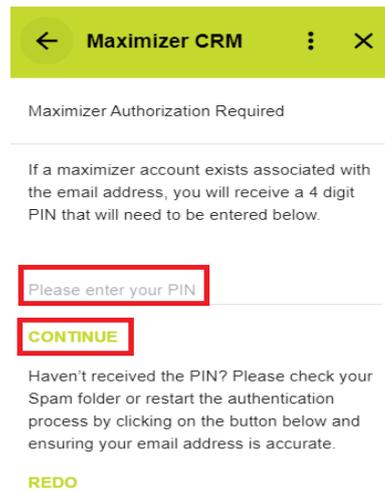
← **Maximizer CRM**    ⋮    ✕

Maximizer Authorization Required

**MAXIMIZER**CRM

**Save emails to Maximizer CRM**
You can save your emails to your Maximizer records.

**Create or Update records in Maximizer CRM**
You can Create or Update various types of Maximizer records.

Connect your Maximizer account to get started!

**CONNECT TO MAXIMIZER**

**CONNECT TO MAXIMIZER DEV**

**Step 8**

Enter your email address associated with your **MAXIMIZER**CRM account and click on "Continue" button.

← **Maximizer CRM**    ⋮    ✕

Maximizer Authorization Required

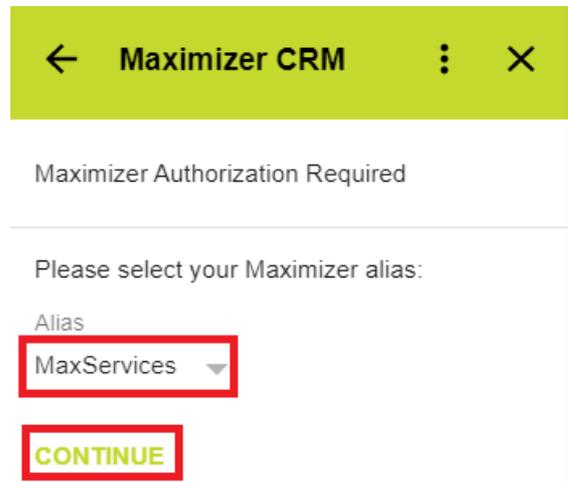Please input your Maximizer login email Address
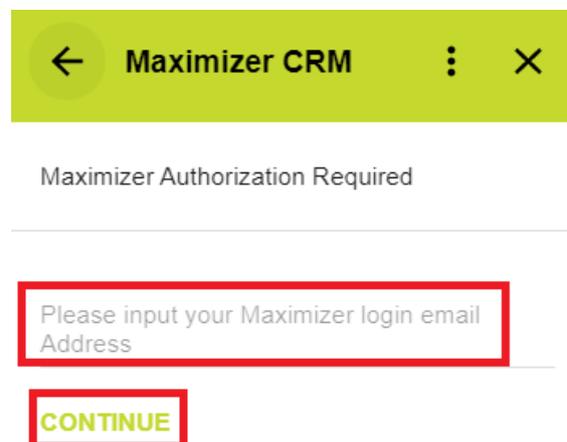
**CONTINUE**

**STEP 9**

You should receive a 4-digit security code to the email address provided in Step 8. Enter the code in the Add-on window and click on "Continue" button.
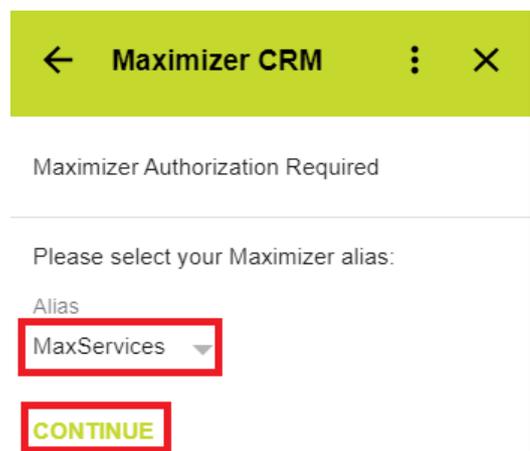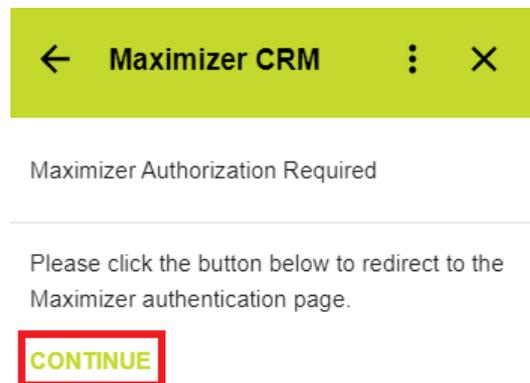
**Step 10**

Choose the **MAXIMIZER**CRM account that you would like to connect to, and click on the "Continue" button.

**Step 11**

Click on the "Continue" button again, which will open a new OAuth dialog window prompting you to authenticate to your Maximizer account.

Complete the Maximizer OAuth process, and if successful you should see the message "Success! You can close this tab". Close the tab and return to your Gmail window.

**Step 12**

The add-on has now been successfully installed and setup for your Gmail account.

Open an Email from your inbox or from any folder to get started.

**Maximizer CRM**

**To Get Started**

Open an Email Conversation
*or*
Choose an Action from Menu

**MAXIMIZER**CRM

## Experience **MAXIMIZER**CRM

**MAXIMIZER**™CRM helps small and medium-sized teams consistently overachieve their business goals with centralized, easy-to-use and powerful views of their business data - all in one tab.

## Further information

For more information, contact Avrion, Maximizer's long term solutions partner:

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