Grow sales revenue, marketing ROI, and customer happiness with the Vtiger CRM Cloud Learn more or Try it Free

Gmail Bookmarklet

From vtiger

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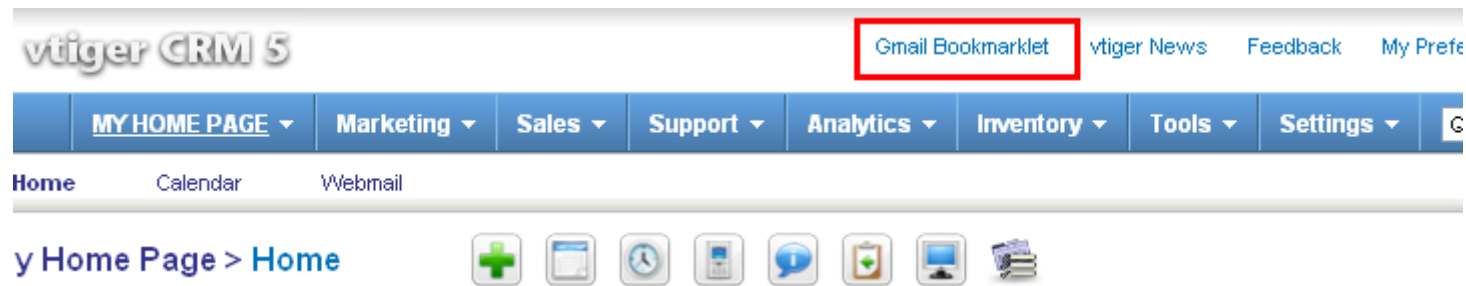   - 2.6 Step-6
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About

With gmailBookmarklet feature you can add any mail from your gmail to vtiger CRM.
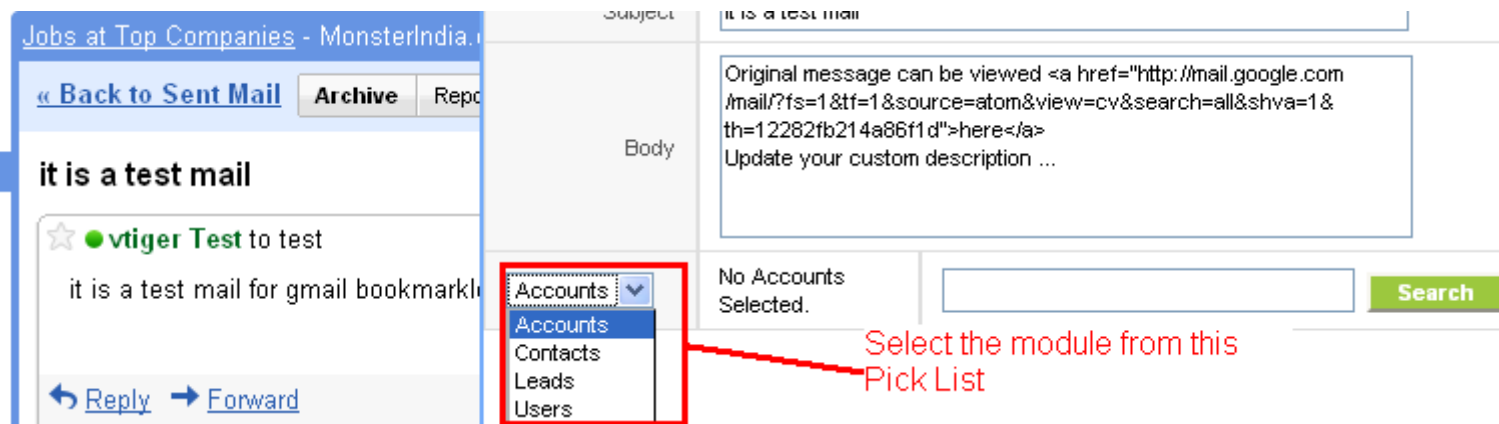
How To Use

Step-1

You will see Gmail Bookmarklet link on the header beside vtiger News in upper right corner as highlighted.

Step-2

Drag the link highlighted to your Bookmark tool bar. It will be copied as Gmail Bookmarklet.

Step-3

Open any email you like to add to vtiger CRM in your Gmail and click on the Gmail Bookmarklet option in your bookmark List.You will now see a pop up window, select the related module to which you want to email to be associated with.See the below image.

💡 On IE a pop window will appear instead of a layer as shown above, but the behavior and the functionality remain the same.

Step-4

Type name of the entity and click on the search.You will get the search result.

Step-5

select an entity from the list of displayed results by clicking on them.•Now Click on save button, which will add the email to vtiger CRM And an alert will be shown stating the same.

Step-6

In vtiger CRM under More Information tab of Account you can see the email added.

Email		Showing 1 - 1 of 1				Add Email
Subject	**Related To**	**Date Sent**	**Assigned To**	**Access Count**		**Action**
it is a test mail	vtiger		admin	0		edit | del

Step-7

Clicking on email record will open up the window which provides the actual link to your email in GMail.

To:	
Cc :	
Bcc :	
Subject:	it is a test mail

Forward   Edit   Cancel   Print

Original message can be viewed here Update your custom description ...

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