LeadMaster CRM
Gmail Chrome Extension

CONTENTS

INSTALLING THE EXTENSION

1. Download the **LeadMaster CRM for Gmail** Chrome Extension by clicking here. Alternatively, you can search "**LeadMaster CRM for Gmail**" in Chrome Web Store.
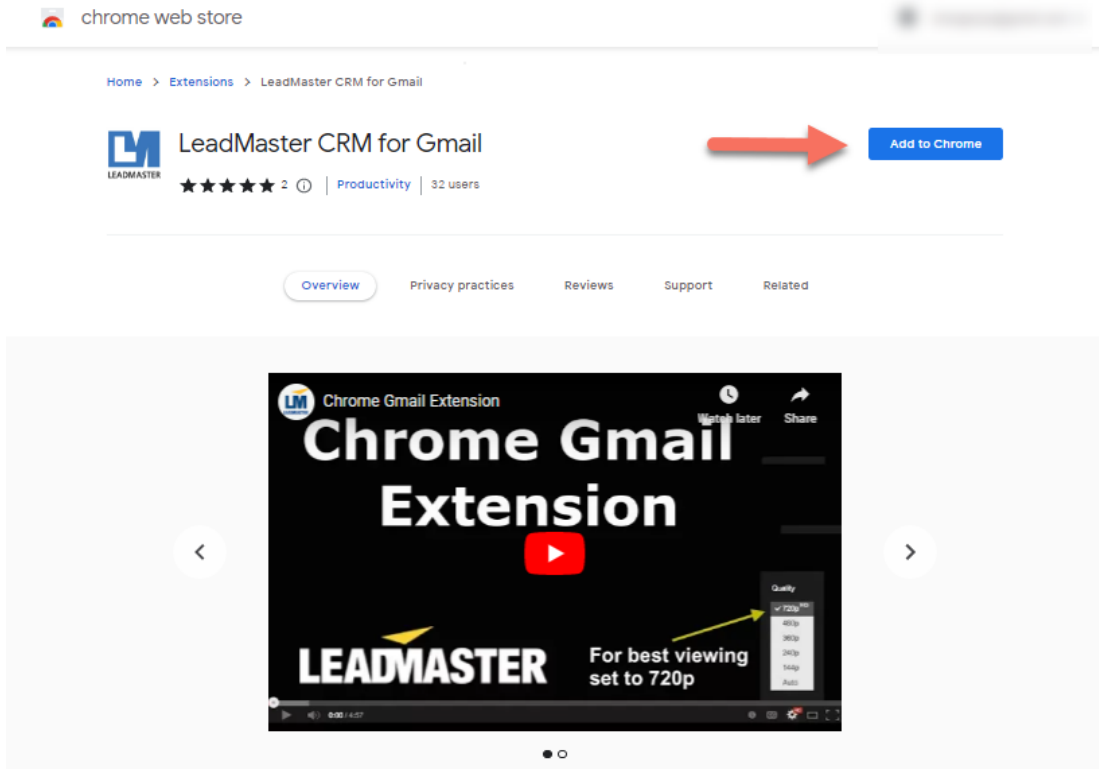
2. Click Add to Chrome to add **LeadMaster CRM for Gmail** to your Google Chrome Extensions. If you are not already signed in to your Gmail account, you will be prompted to log in. If you're logged into Gmail, log out, then log back in to activate the extension.
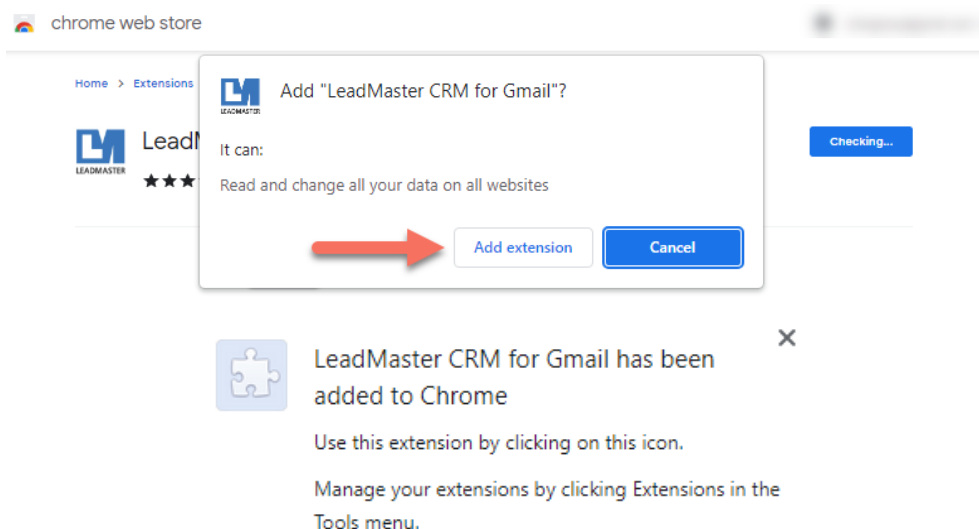
The **LeadMaster CRM for Gmail** should now be available within the extension menu on the top-right part of the Google Chrome and within your Gmail inbox.
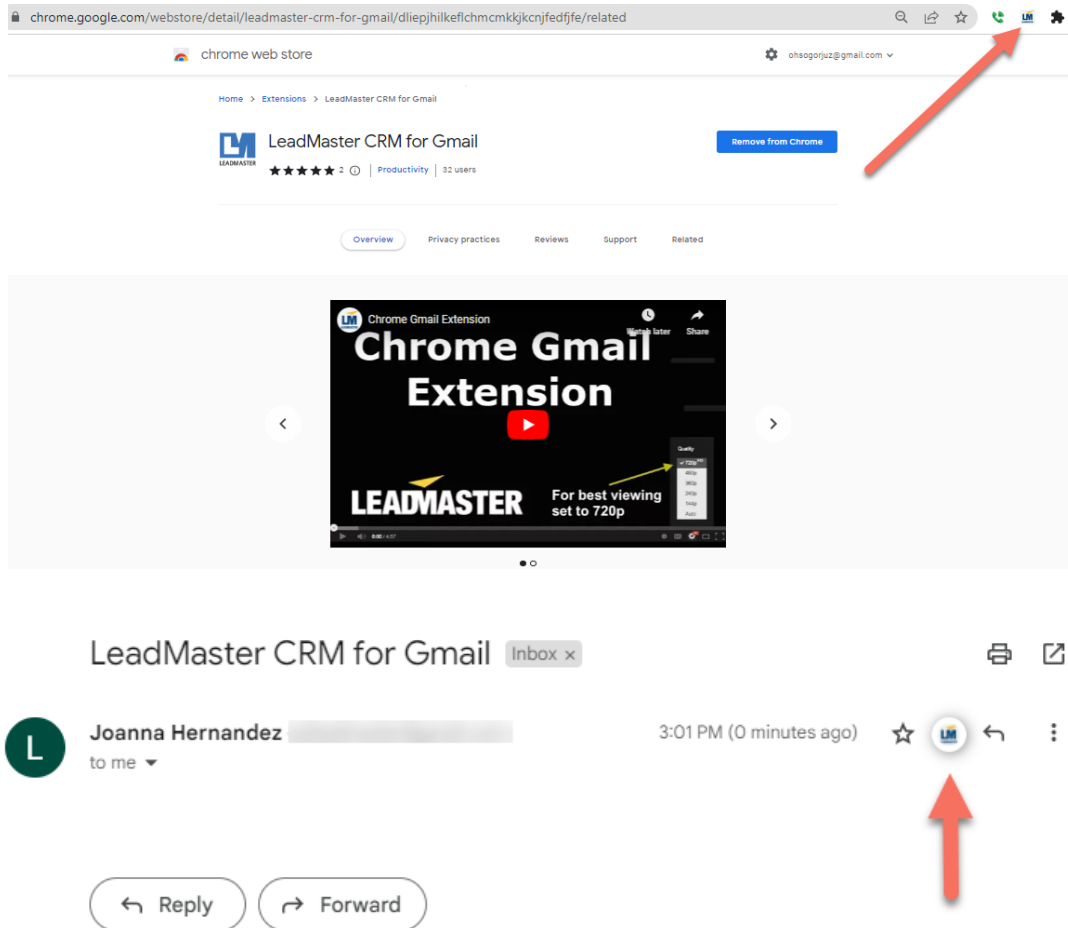

Note: The extension will only be usable when viewing an existing email in your Gmail account. It cannot be used from the list view or from the compose email window.
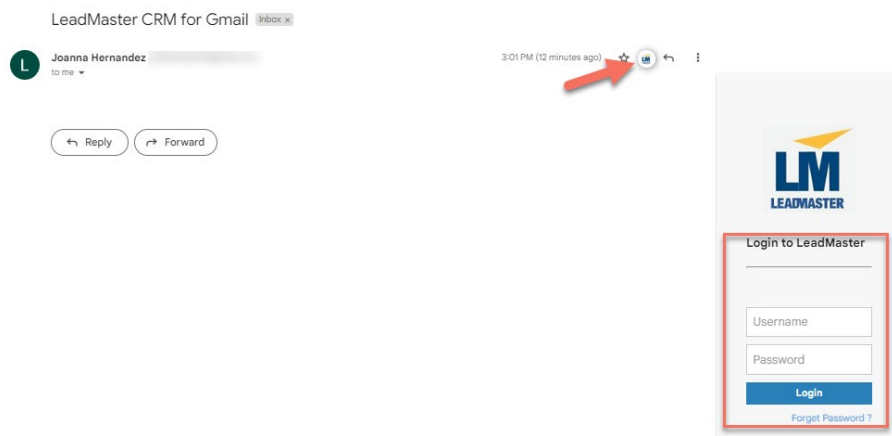

LOGGING IN TO THE LEADMASTER CHROME EXTENSION

To log in to the LeadMaster Chrome Extension, you can either:

1. Click the **LeadMaster extension icon** on the top-right part of the Google Chrome browser and enter your **LeadMaster CRM credentials**.
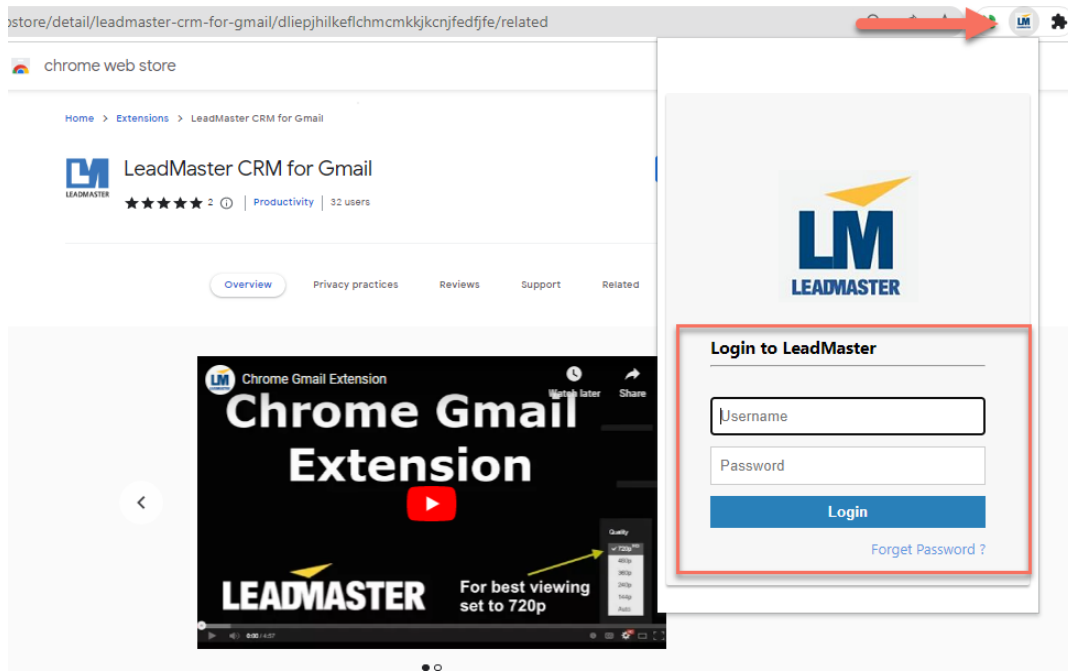
2. Or simply click on an email within your Gmail inbox and log in through the **LeadMaster extension icon** you'll see on the right to open the panel.


Congratulations! You're ready to integrate LeadMaster and Gmail seamlessly.

UNDERSTANDING THE LEADMASTER EXTENSION PANEL

The LeadMaster Gmail Chrome Extension integrates seamlessly with the LeadMaster CRM, which is an all-in-one customizable tool that allows you to manage and track leads, and automate marketing and tasks.

The LeadMaster Gmail Chrome Extension's sidebar panel provides you options to view and access contacts, email history, lead nurturing, callbacks and contact notes available in your LeadMaster CRM account.
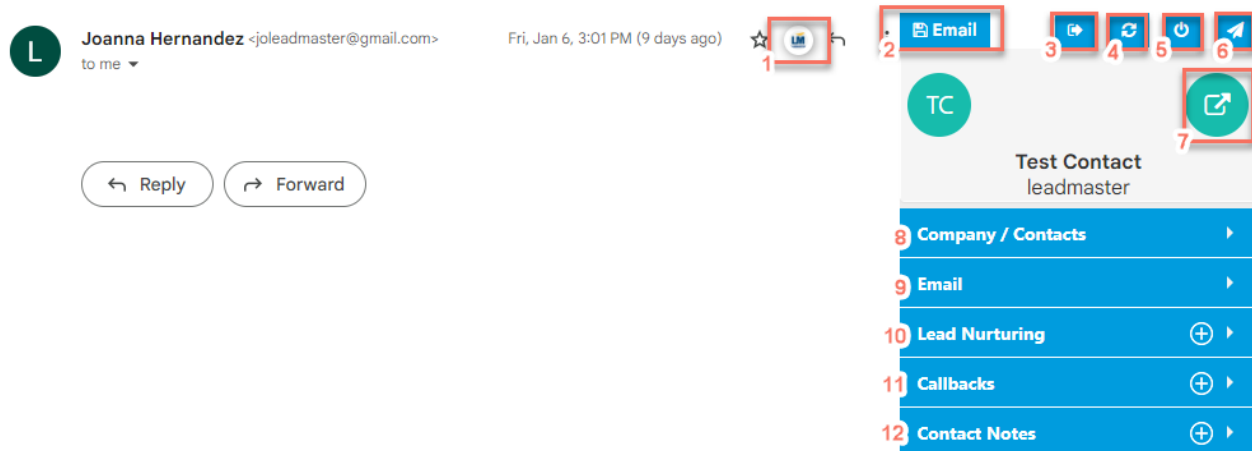
1. Gmail Chrome Extension Toggle button
2. Save and log the currently opened Email to the Contact in the CRM.
3. Sign out from the extension
4. Reload or refresh the extension sidebar
5. Close the extension sidebar
6. View and go to the Record/Contact in the LeadMaster CRM
7. Open the LeadMaster CRM in a new window
8. View the Record/Contact information
9. View the Contact email history
10. View the lead nurturing campaigns
11. View scheduled callbacks and appointments
12. View Contact notes

CREATE AND ADD CONTACTS TO THE CRM

When opening an email, the LeadMaster extension searches against the email's Contact Name and email address. If not associated with an existing Company/Contact in the CRM, the LeadMaster Gmail Chrome Extension will give you the option to add the contact to the CRM.

To add a contact from a Gmail message to the CRM, click on "company/contacts" in the sidebar. A drop-down menu will appear where Gmail information is dynamically inserted. Make any modifications you deem necessary and add any additional information you may find useful and click on "**Add to CRM.**"

The changes will be reflected in LeadMaster, and will be retained in Gmail.
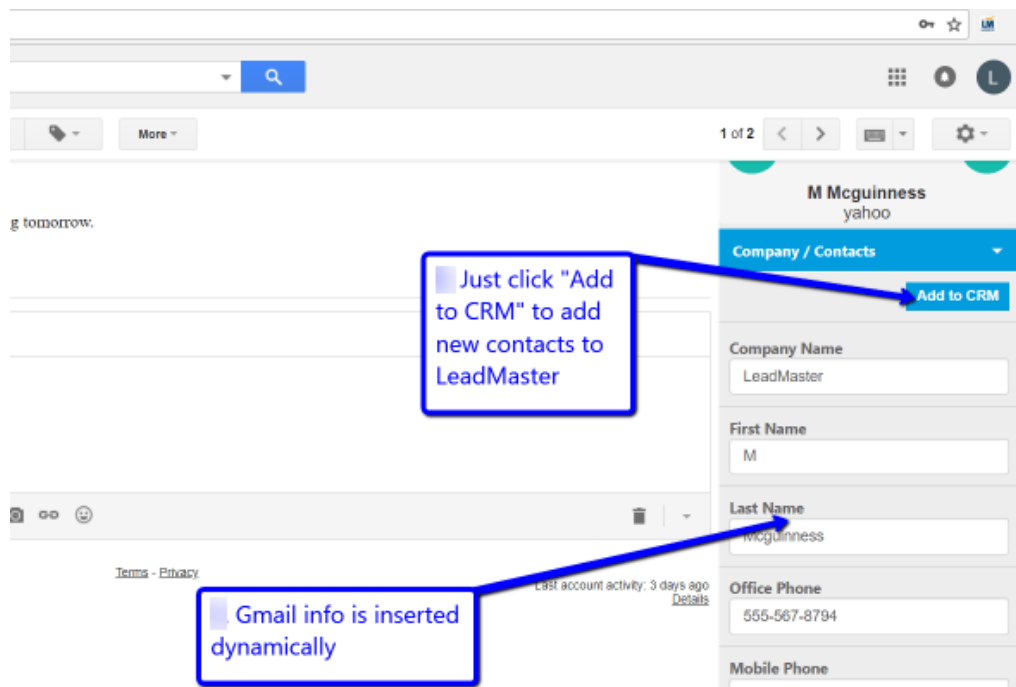
UPDATE AN EXISTING CONTACT

If a contact exists, you may update the contact by clicking on "company/contacts," change any information you see fit, and click on "**Update to CRM**."

Add additional information by clicking the more button at the bottom of the sidebar. Insert address information easily so your contact information in the LeadMaster CRM is complete.
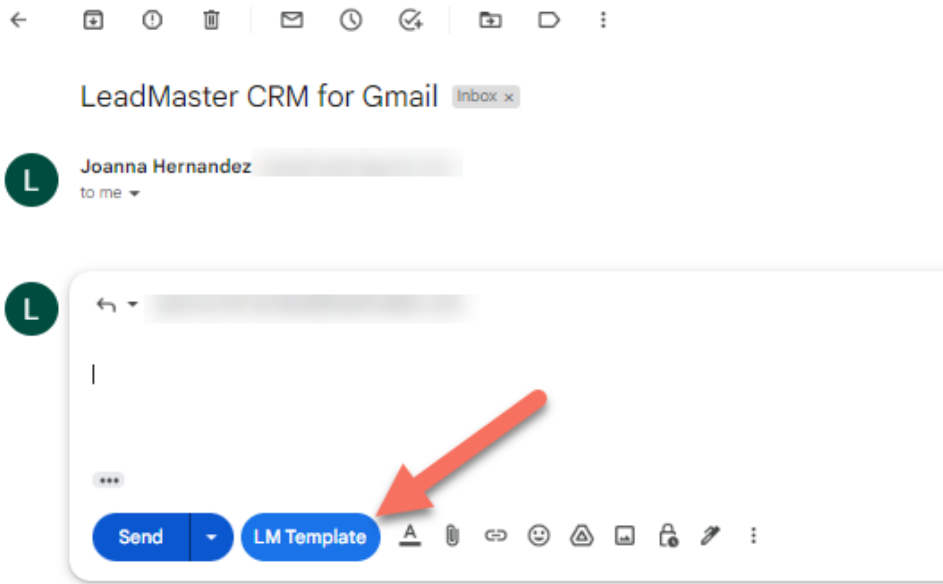
EMAILS

TRACK EMAIL HISTORY

Track emails through Gmail, and take critical actions straight from the inbox to follow up on messages sent. Head to the CRM to see when emails were opened, and what links were clicked – allowing you to understand what email campaign content is resonating.
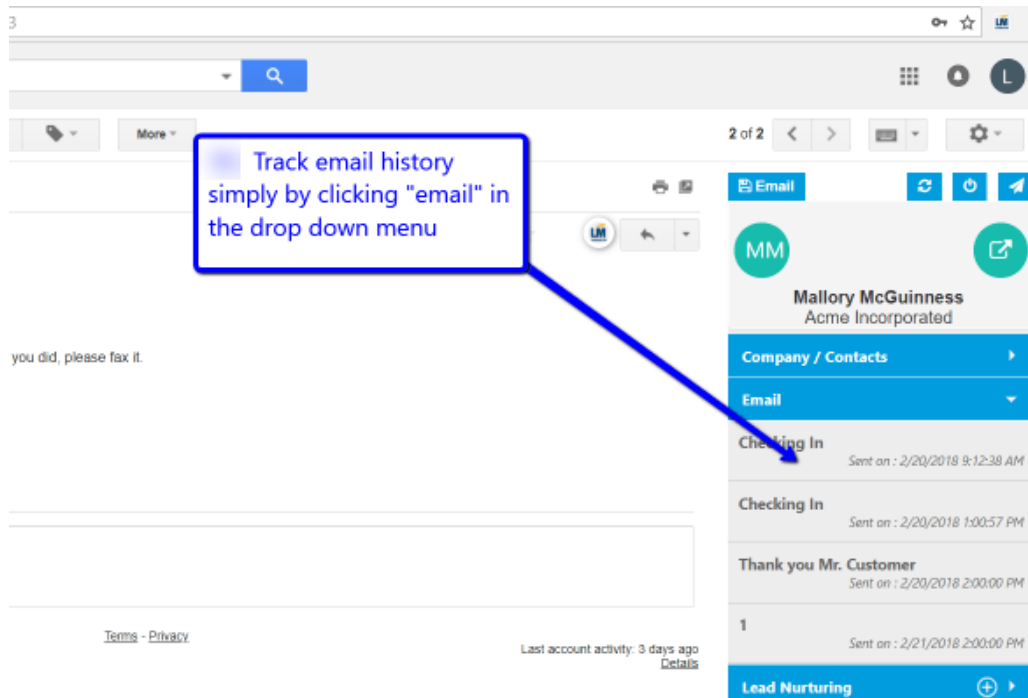
SEND CUSTOMIZED EMAILS

When you compose a new email with the Chrome extension, you have access to all of your LeadMaster email templates at your fingertips.

Click the LM Templates button to access and apply a template to your email.

Note: Only ACTIVE Email Templates will be displayed and will be accessible from within Gmail.

AMPLIFY YOUR LEAD NURTURING EFFORTS

Lead nurturing has never been this convenient. Track lead nurturing activity, and add Gmail contacts to lead nurturing campaigns straight from the sidebar. Select a campaign, schedule a date, and you're good to go.

The first time you add a contact to a lead nurturing campaign, callback or note, a popup box will appear that lets you know you are being logged on to LeadMaster.

To add a Gmail contact to a lead nurturing campaign, click the plus sign next to "lead nurturing." Another popup box appears with a drop-down menu containing your lead nurturing campaigns and a calendar to select the start date.
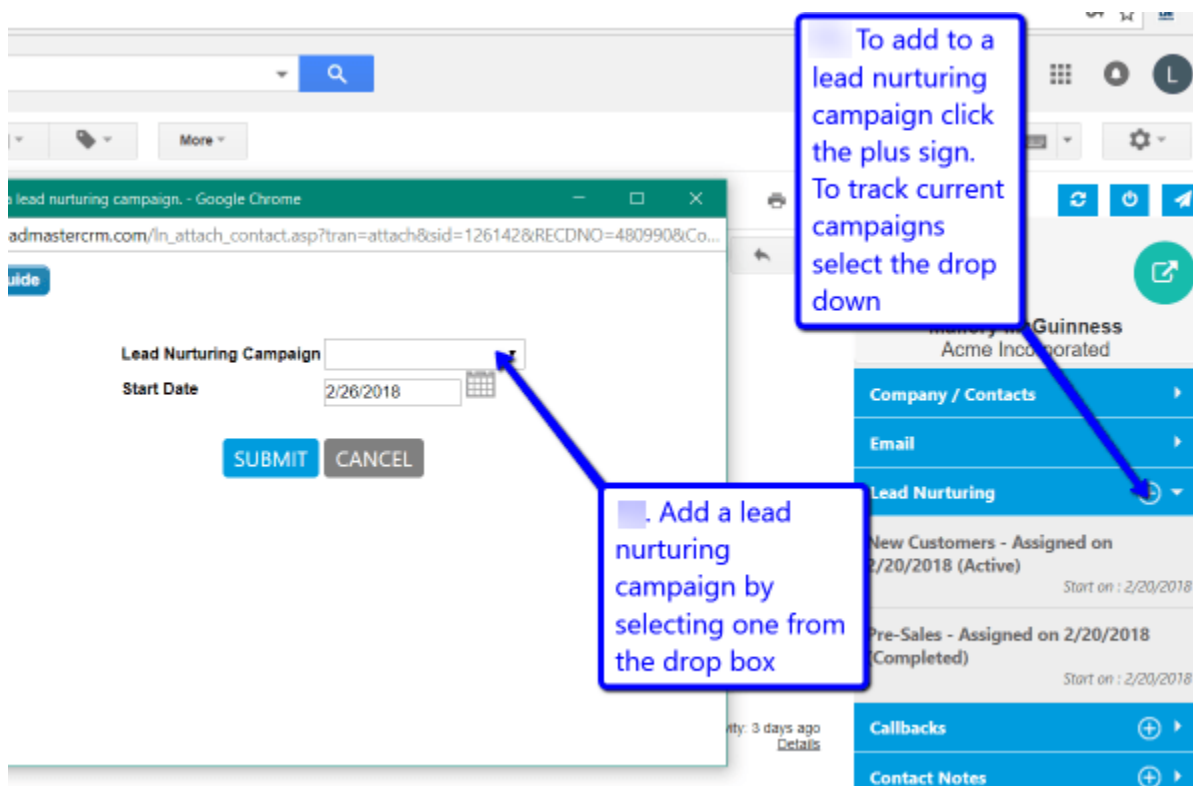
RETAIN AND TRACK IMPORTANT DATA

It's simple to take notes on Gmail messages and send them directly to LeadMaster, and if you'd like, you can track notes taken in LeadMaster and Gmail.

To add a note, simply click the plus sign next to "contact notes." A dialogue box is populated and you can add notes directly here.
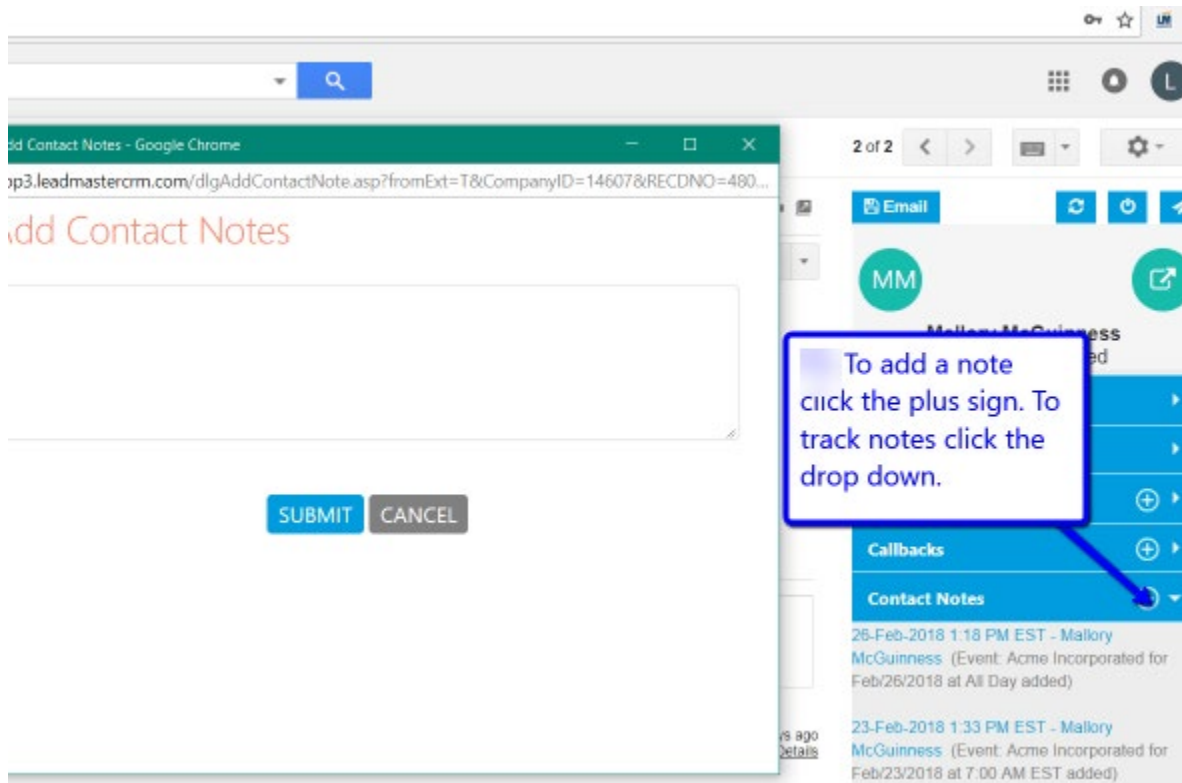
INTEGRATE CALLBACKS WITHIN GMAIL AND LEADMASTER

Need to schedule an appointment or callback from a Gmail message?

Schedule callbacks and appointments from Gmail within seconds, and be reminded of these events within the LeadMaster system. Previous callbacks are displayed as well so you can keep track of points of contact.


IMPORT SIGNATURE DATA

Click on the "contacts" drop down menu in the LeadMaster extension sidebar. Right click on signature data to import company, name, phone number and email data into the CRM.

ADD CONTACTS FROM LINKEDIN

The LeadMaster Chrome extension allows you to integrate your LinkedIn data as well.

Sign in to your LinkedIN account. When you view a contact, you will notice a blue button that says "Add to LeadMaster." Simply click the button and your LinkedIn data is sent to LeadMaster as a new contact.
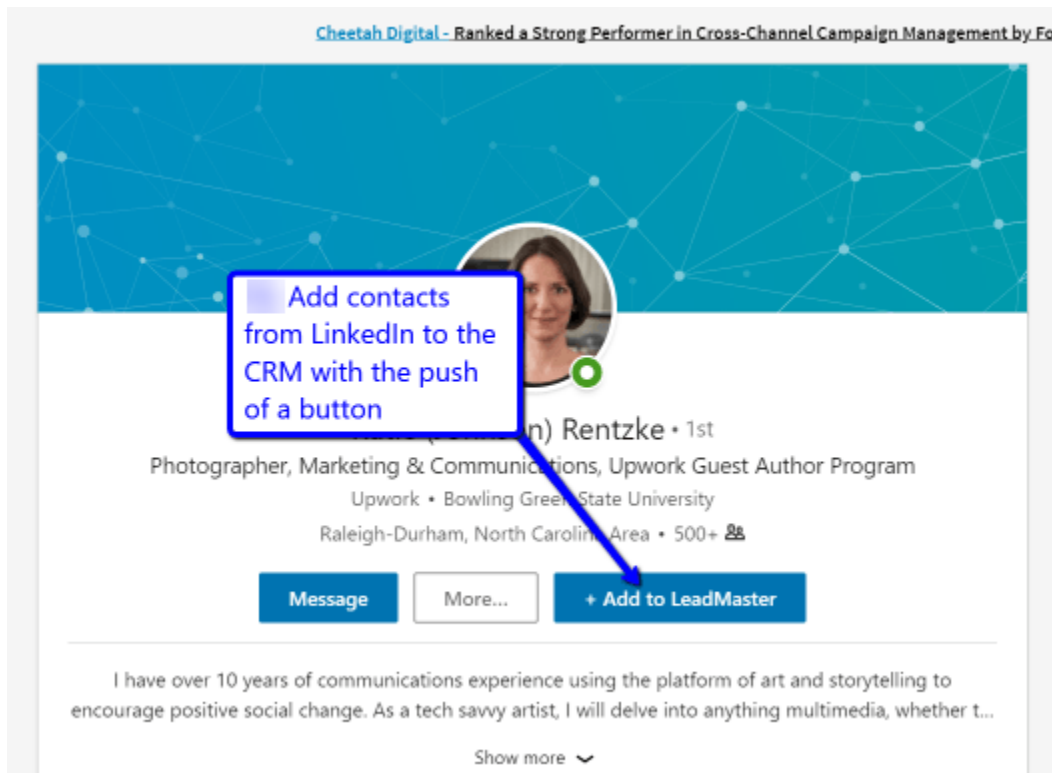
ADD CONTACTS FROM FACEBOOK

With the Leadmaster Chrome extension installed, you can navigate to Facebook on your desktop to start adding contacts to your LeadMaster. Simply go to a Facebook Profile and click the extension icon on the top-right part of your browser.

Clicking the icon will open the Contact Details panel where you can directly add/edit any information before adding the Contact to the CRM.