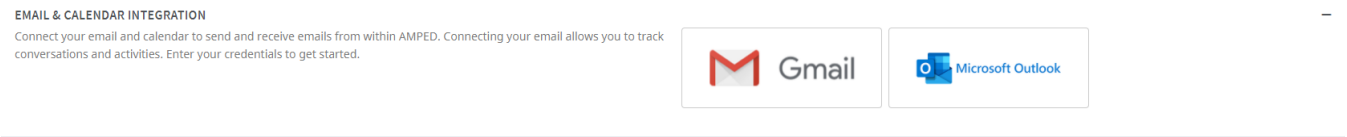
Gmail Integration

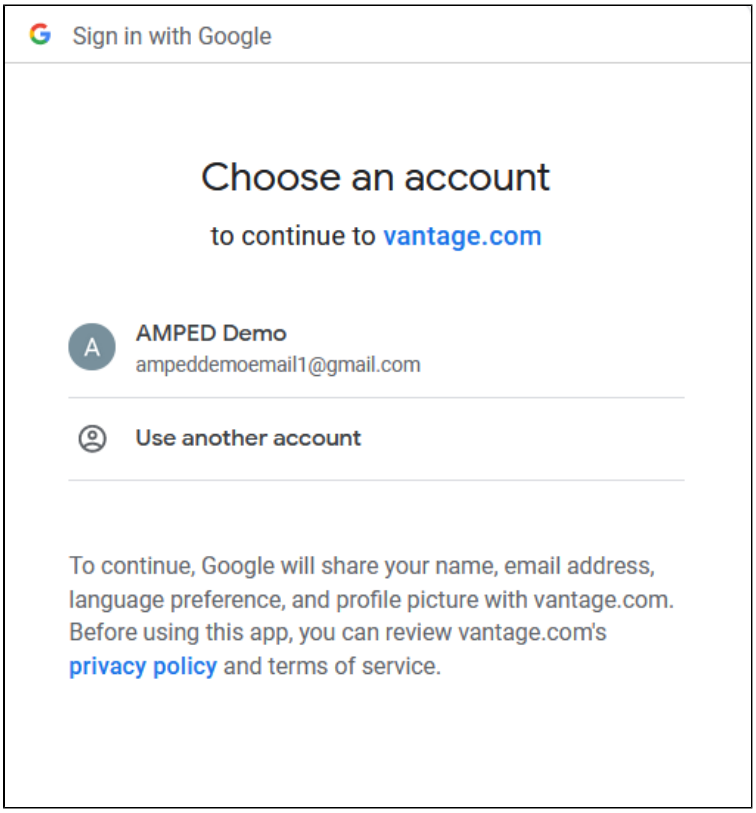
Gmail Integration [Video]

*****Before you begin, clear your junk/spam folder(s) and the trash section in your Gmail to ensure an efficient syncing process. *****

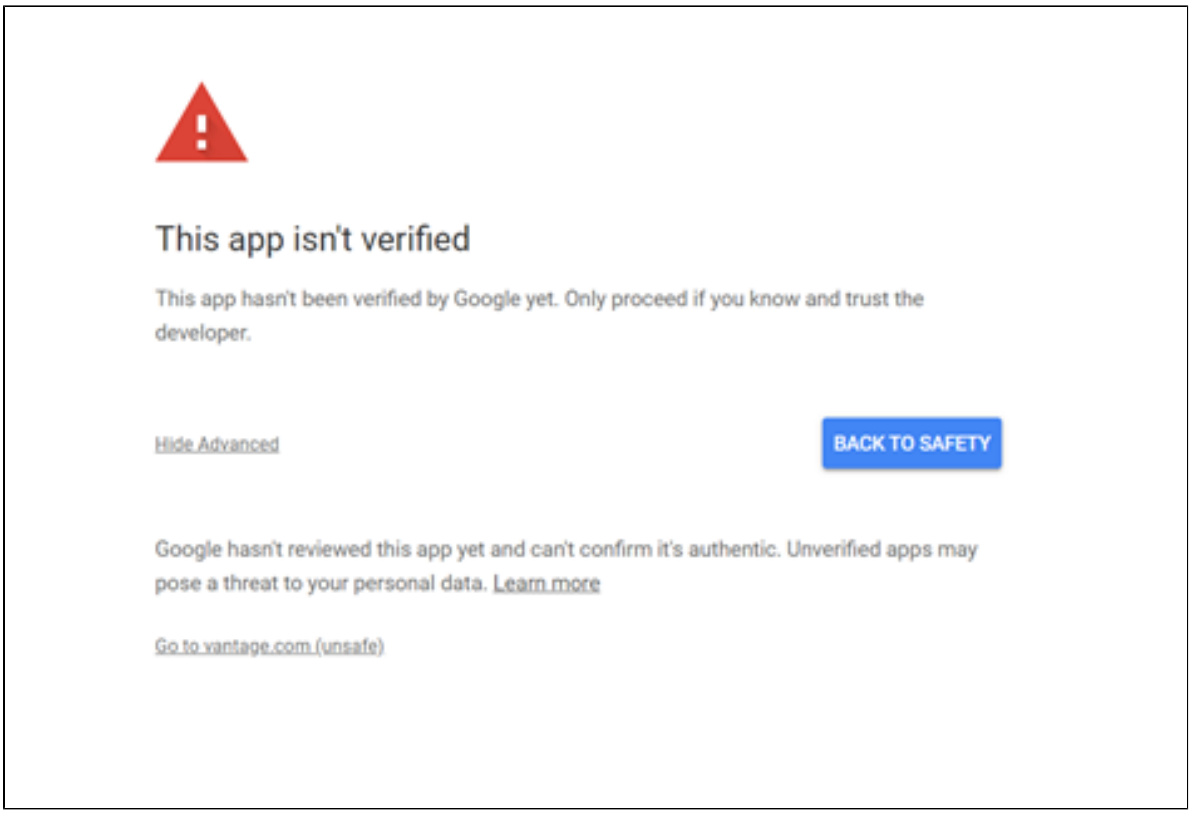
Head to your User Preferences and find the “Email and Calendar Integration” section. Click the Gmail button to begin connecting your Gmail email account.



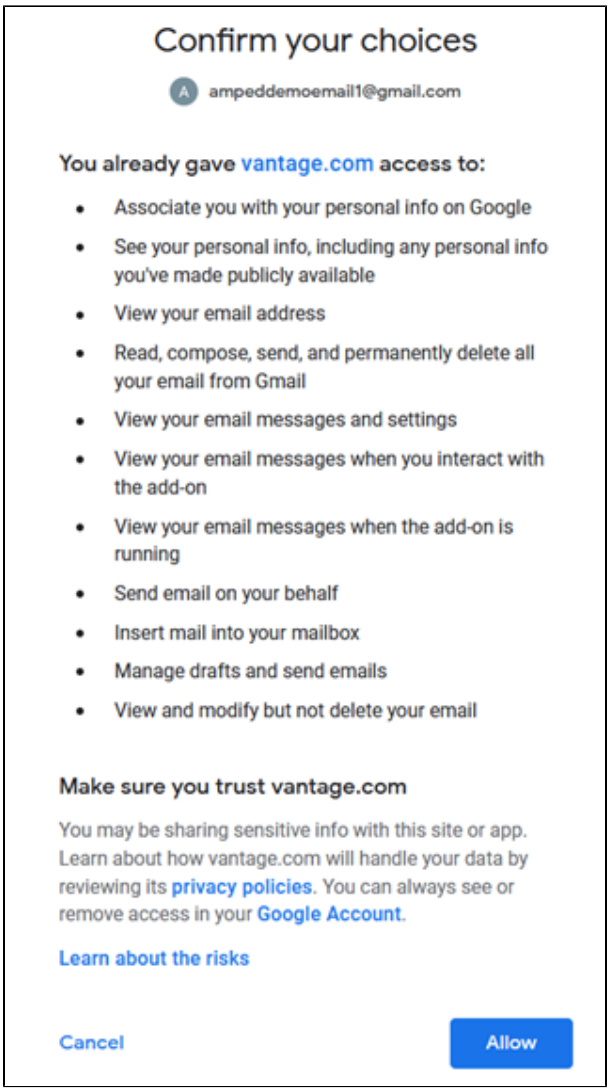
Choose the Gmail account you wish to connect to AMPED.



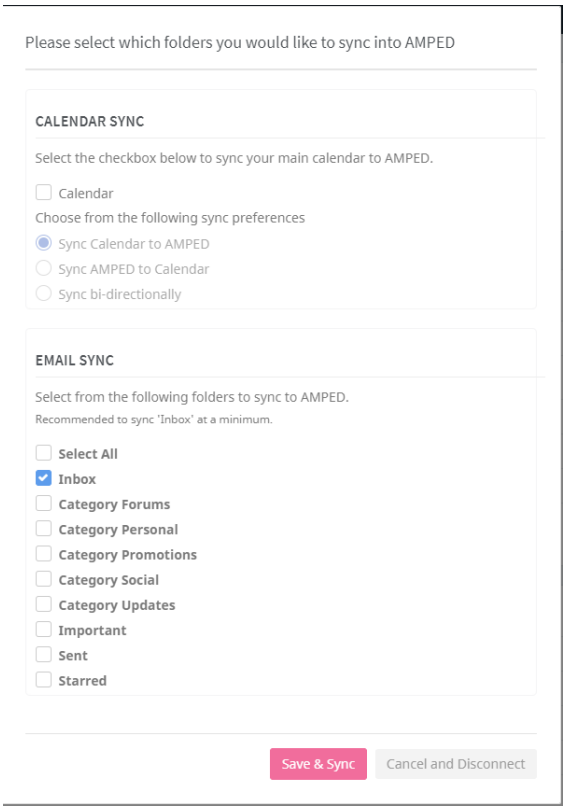
Click Show Advanced to continue to AMPED. AMPED is currently in the process of being verified with Gmail. After clicking “Go to vantage.com(unsafe)” you will be asked to allow AMPED permission into your email inbox.



To confirm AMPED permission into your Gmail, click “Allow”.



Select the calendar and sync preferences, as well as any Gmail folders you want AMPED to sync, and click "Save and Sync." Users must implement at least one folder from the email sync and are recommended to sync “Inbox” at a minimum.

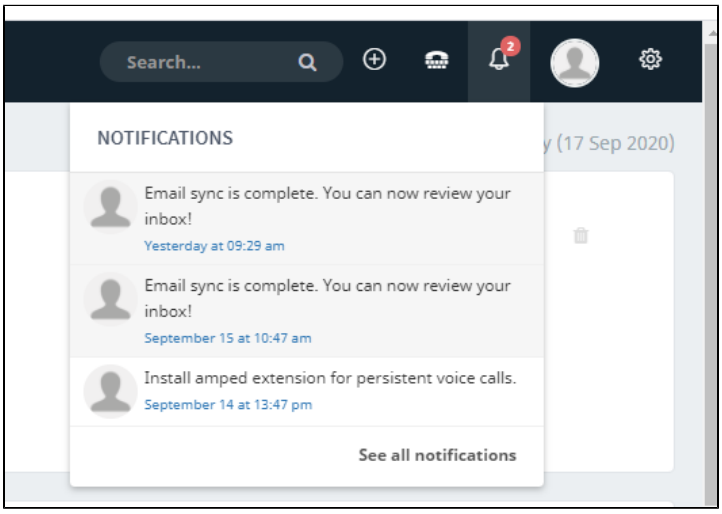


For the email sync, “Inbox” is the only mailbox selected by default. If you would like to include additional folders in your account, please select them from the list.

For the calendar sync, users can select one way-syncs to sync Gmail to AMPED or AMPED to Gmail, or a bi-directional sync with activities syncing every 60 seconds between AMPED and Gmail. The one-way integrations sync one way. This selection is good for users who want one source of truth. The bi-directional sync integrates two ways, making sure that the AMPED and Gmail calendars are the same.

Click ‘Save & Sync’ once you have selected your preferences; AMPED will begin syncing your email and calendar in the background. You may continue to use the application during the sync, and you will receive a notification when the sync is completed.

**Note this can be changed at any point after initial sync. To do so, go back to your Email and Calendar Integration in User Preferences and click on "Update inbox selection*."



Sync Frequency and Automatic Exclusions

The initial integration will sync up to your most recent 5,000 emails and all calendar activities from the start of the month. Thereafter, emails and calendar activities will be synced every sixty seconds. AMPED best practices recommend setting up the bi-directional sync and AMPED to Gmail sync at the start of the month to avoid syncing past activities. AMPED will not integrate SMS records, call records, or privately marked calendar activities. Furthermore, the date range of sync from activities will be excluded from the Gmail to AMPED sync.

Manually Excluding Activities from Sync

To avoid unwanted activities, mark an activity private on Gmail to exclude it from syncing to AMPED.

Record Association

One direction Syncs

Gmail to AMPED integration syncs scheduled meetings and tasks scheduled in Gmail to the AMPED calendar module. When you send or receive an email or a calendar invitation through Gmail, the events, associated leads, and contacts will automatically sync into AMPED. Activity provided that the email address included on the Gmail invite is associated with a lead or contact that is also assigned to the syncing user. Any attachments contained in the original Gmail invite will also be synced to the AMPED activity.

AMPED to Gmail integration syncs scheduled meetings, calls, and task activities back to Gmail. When you schedule an AMPED meeting, call, or task and associate a lead or contact, the creation of the activity in Gmail upon sync will send invites to the email addresses contained on the original Lead or Contact record. Any attachments contained in the original AMPED invite will also be synced to the Gmail activity.

To ensure activities are properly attributed to opportunities, users should revisit the activity and make the association the appropriate opportunity.

Bi-Directional Sync

The bi-directional sync integrates two ways, ensuring that AMPED and Gmail calendars are the same

The bi-directional integration syncs scheduled meetings and tasks scheduled in Gmail or AMPED to both the Gmail calendar and the AMPED calendar module. When you send or receive a calendar invitation through Gmail, the events, associated leads, and contacts will automatically sync into AMPED. While, when you send and receive a calendar invitation through AMPED, the creation of the activity will send invites to the email addresses contained on the original Lead or Contact record. The Bi-directional sync will update the title, location, event date, and event details.

By using the bi-directional sync, you can delete AMPED calendar activities directly from your Gmail calendar. AMPED does not support the deletion of activities from Gmail. If you would like to remove it from AMPED, please delete it from your Gmail Calendar.

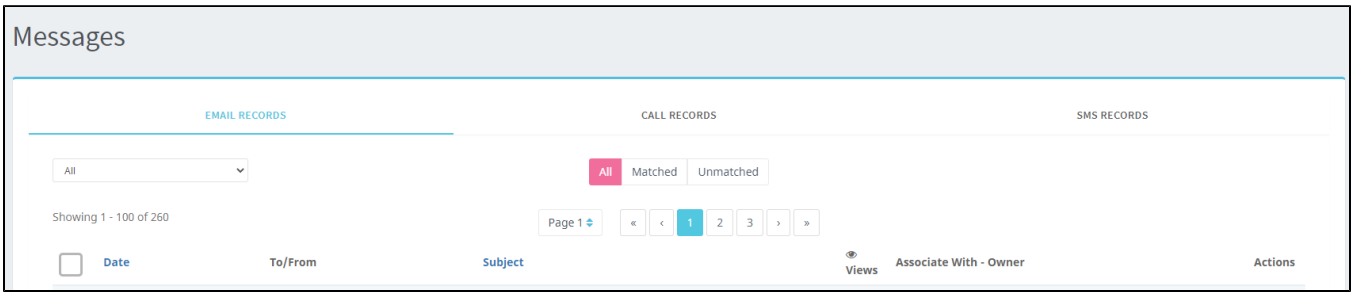
Email Sync

This two-way email sync allows you to send and receive emails and maintain email threads and messages with your leads and contacts all within AMPED. Whether you email through AMPED or through Gmail, your conversation is synced and allows you to view your entire conversation.

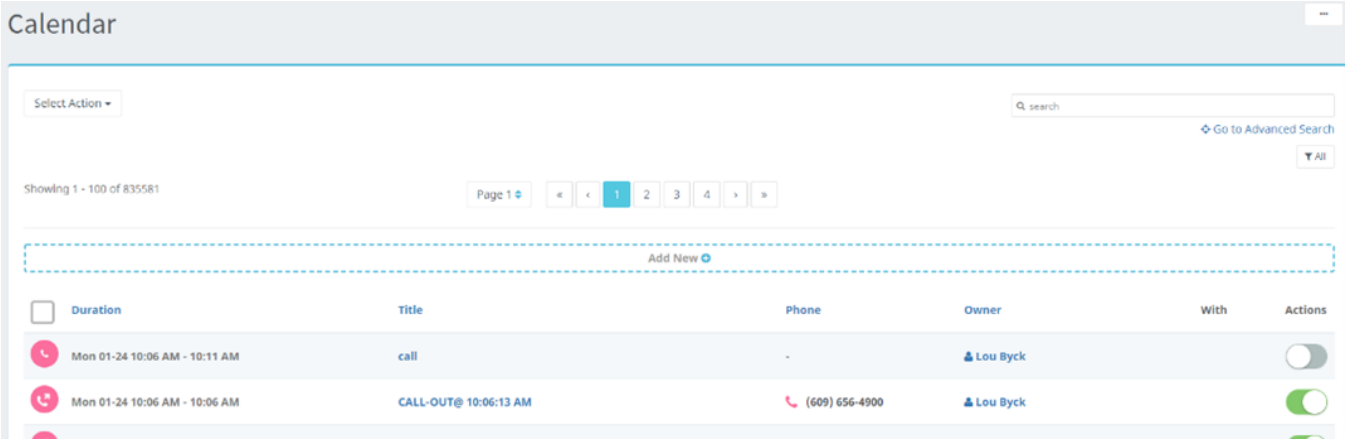
Go to the Email Records section of your Messages module to see your connected inbox.

Special Use Case for Sending Attachments in Gmail

AMPED users have the option to sync AMPED activities and attachments to their Gmail calendar. Google Drive will automatically store and save the attachments to the activity and display them through Google Drive. In the absence of a Google Drive account, users will be unable to access the attachments. AMPED recommends that all AMPED users who use Gmail as their primary email provider create a Google Drive account to save and store attachments.



Go to the Calendar Module section to see the synced calendar meetings and activities



**Virtual meeting links will be included in the body of the calendar activity.*