# Chapter 2

Google Contacts - Your Customized CRM

In the business of sales, a most valuable success tool is a functioning CRM, or Client Relationship Management system. At its best, a CRM is your data source to develop and maintain customer relationships, stay connected with your customer base and improve your bottom line through keeping vital information always at your fingertips.

A great CRM is one that allows you the flexibility of recording and organizing all the right information about individual prospects, customers, companies and suppliers that will keep you informed about current transactions and have the information that can affect future business. Far more than just managing contacts, you are truly managing the full scope of the relationship, from introduction through closing the deal.

In today's business, the follow up is often more important than the sale itself. The personal touch is so well received by people in this time where more that half of transactions are done online or through a call center. The information you store in your CRM on each entry can be the difference between closing a sale today and having a customer for life, with lots of referral business as a result.

There are so many options for CRM solutions today at a wide variety of price points. I would recommend that you look at several different applications to see if they will fit into your CRM strategy. What you may discover is what you have available for you today as a Google app may be more than sufficient for your needs, or at the very least a great tool to get started or better organize what system you currently employ.

Let's begin by opening the Contacts app. From any page in Google, click on the Apps Launcher in the upper right corner of the screen:
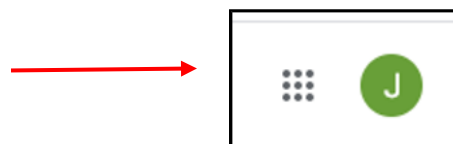
The Apps Launcher is customizable, by simply dragging the icons around the area in the order you would like them to be. To begin using Contacts, click on the icon as below.
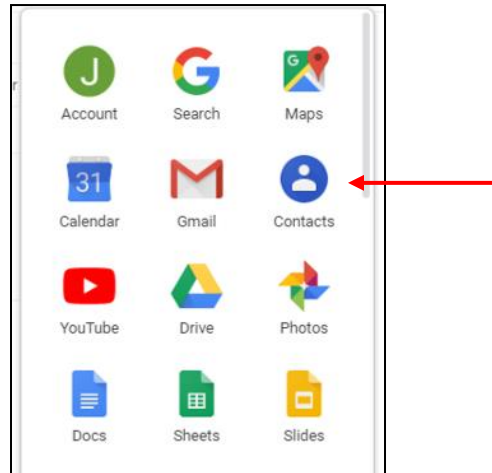
If this is the first time you've open the app, you may be surprised to see there are contacts already populated here. If you use an Android OS phone, your phone contacts have automatically been synchronized with the desktop Contacts app. They may still need to be organized, and we will do so soon. If you are an Apple iPhone user, or have a contacts spreadsheet on your computer, your contacts can easily be imported into Google Contacts as well.
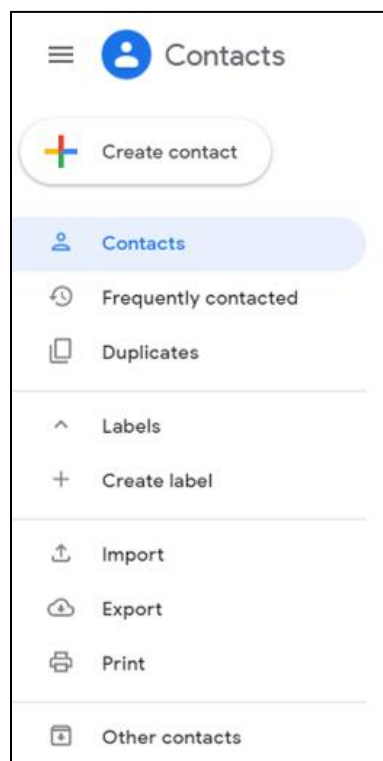

Let's begin with the Contacts menu:Contacts can be organized and displayed in a number of convenient ways. Create a new profile by clicking "**Create Contact** at the top. Each entry can be organized into labels and sub-labels and can appear in more than one at a time.

It is a good idea to create labels first so as you add or import contacts they can be assigned to the labels at once. You can always add, delete or rename labels at your convenience.

These contacts will sync to your Android smartphone automatically and will be under the same labels as here. We will create the sync for iPhones, but the labels will not transfer over to the mobile device. If having contacts separated by labels on your iPhone is a must, then install the **Contacts Sync app for Google contacts**, available in the App Store.

Let's create a new contact. Click on Create Contact:
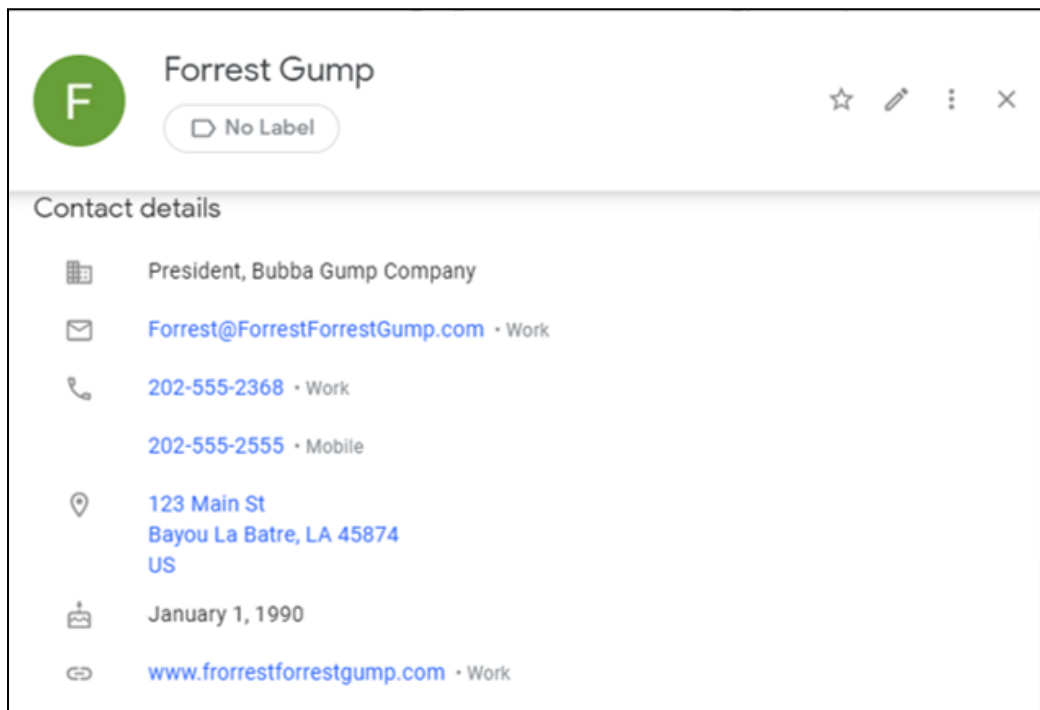
When you select **Show more**, here you'll find many more fields to populate with valuable information about your contact. Add their birthday, website, links to events, your relationship and more. Use the **custom** field to add specific information regarding their transactions, pertinent information, and any useful information you can use moving forward.

Contacts Power Tip

How to Power Search for Anything

The powerful Google search engine doesn't only work online, it works in all apps, including Contacts. Perform a keyword search of any term and Contacts will return every profile that has the term anywhere it exists.

Use the search bar across of the top of the screen. You can even create a label to organize all the contacts that contain the term.

Try it, It works!

Import Contacts From Other Sources

Whether you have been using Microsoft Outlook, Apple contacts, or any other contacts database, you can easily import the list into Google Contacts without deleting the original. Importing contacts is a universal process, and all CRM tools use the same file type, the CSV. These files are simply spreadsheets that contain all of your contact data, but it must be saved as a CSV file instead of a standard XLS file.

You may ask why can't I just sync my current contacts to my smartphone? Isn't that the easier route? Yes, you can, but the real benefit of using the Google Contacts app is that it seamlessly integrates with all the Google apps, from Gmail and Calendar to Drive, YouTube and the rest. One of the best features of Google's core apps is how they are designed to share information online, be it by email, blogs, websites, video or social media.

Importing from Microsoft Outlook Contacts

Outlook has made it easy to export the contacts and calendar content and import it into Google and other CRM applications. Simply follow these steps and you'll soon have your Outlook contacts copied into your Google CRM which will sync to your smartphone.
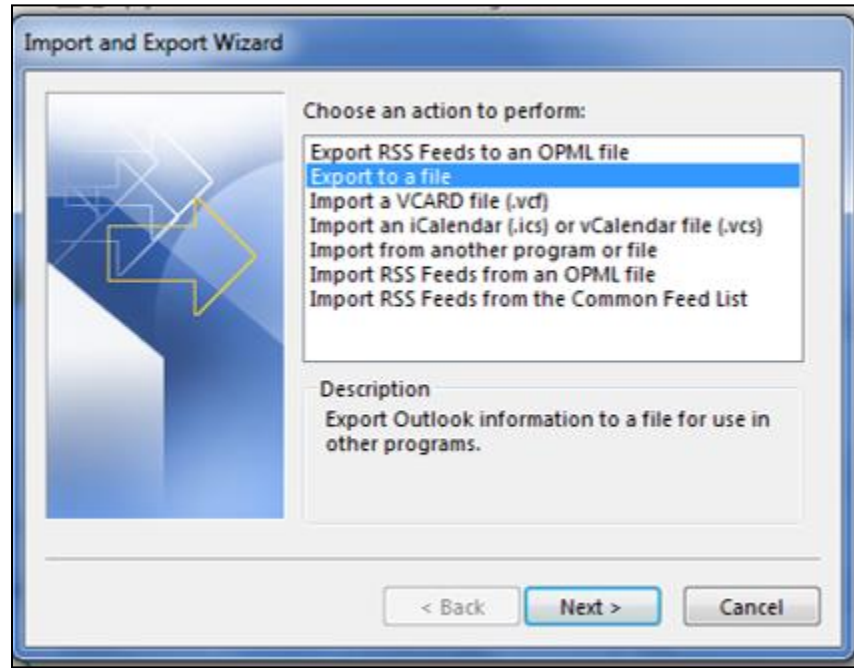
Open your Outlook account and select contacts from the menu icons in the lower left.
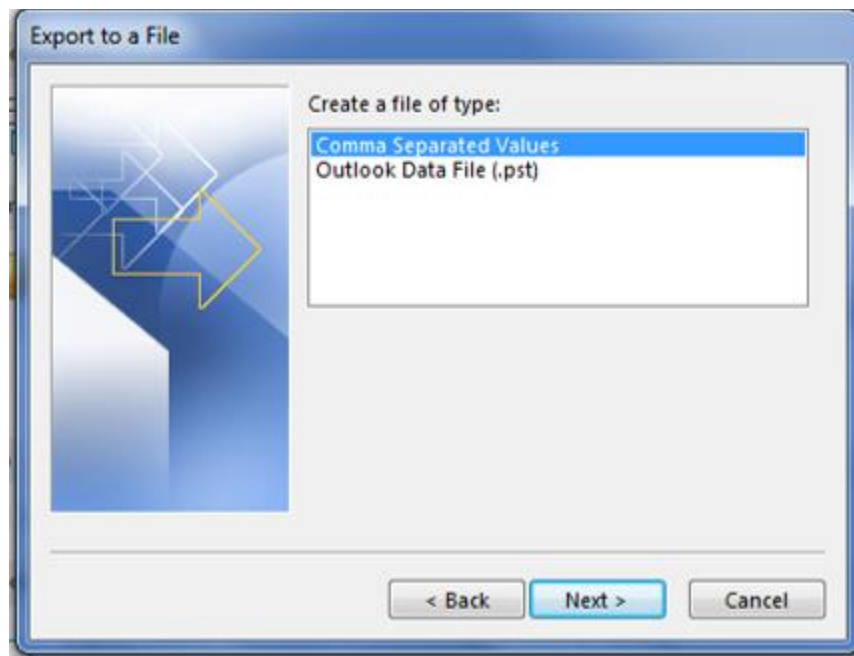
Go To Files > Options > Advanced > Export
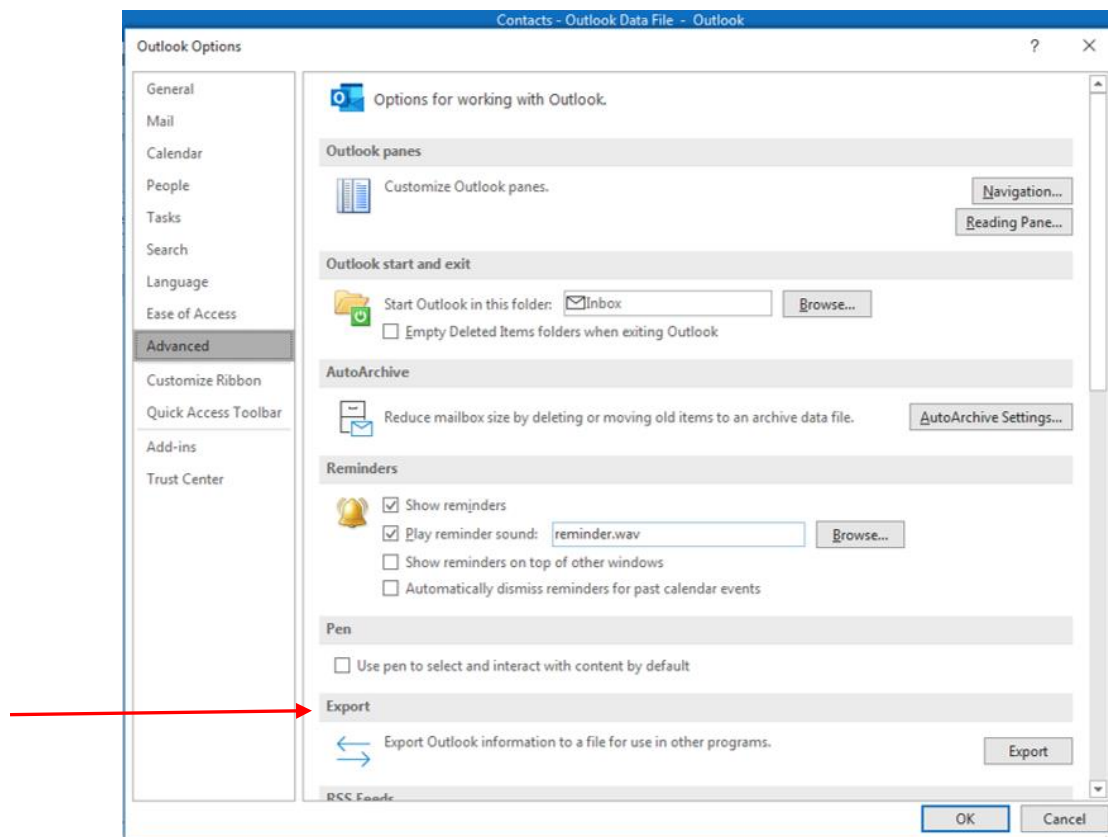
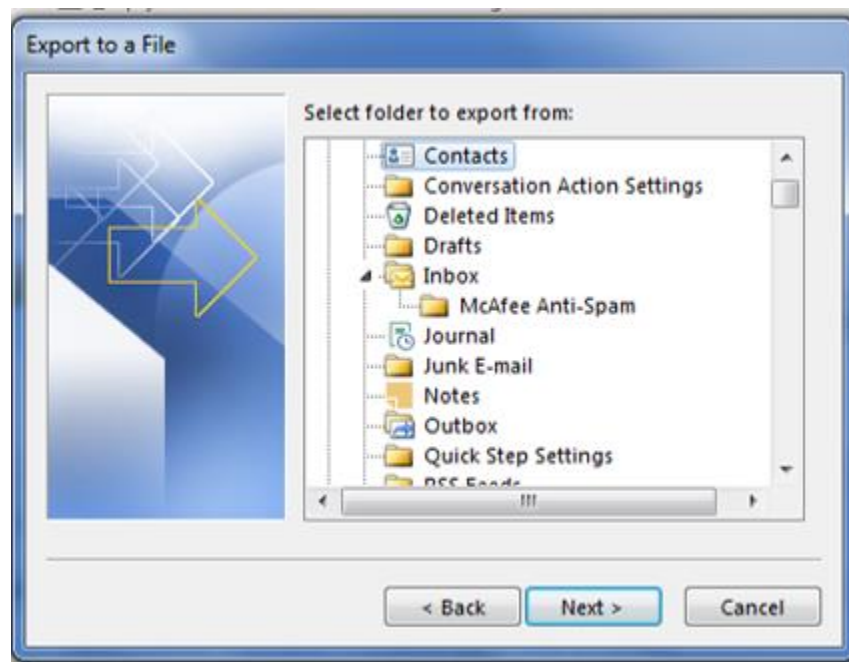Highlight the contacts you wish to create the file.

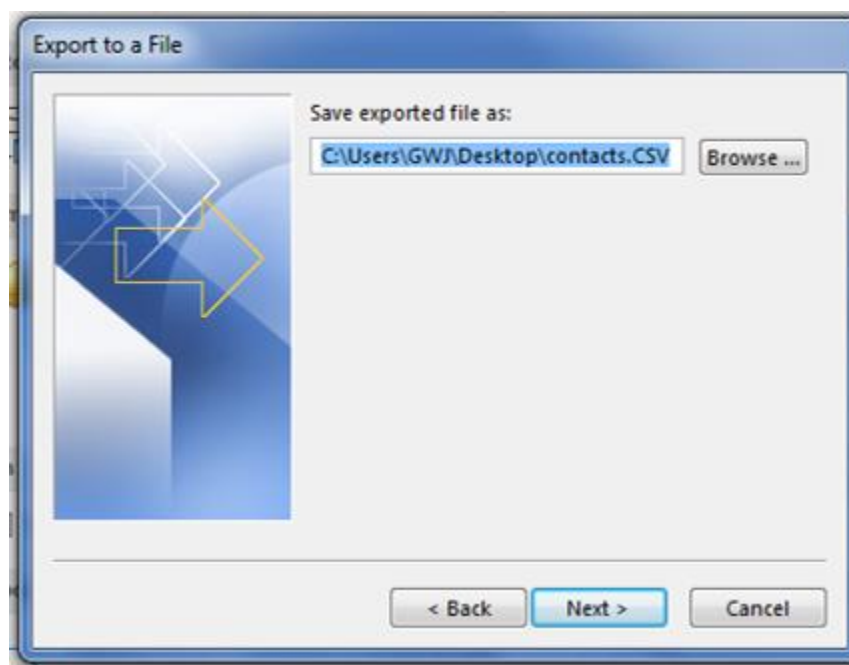Click Export and open the wizard, select **Export to a file**, then **Next.**

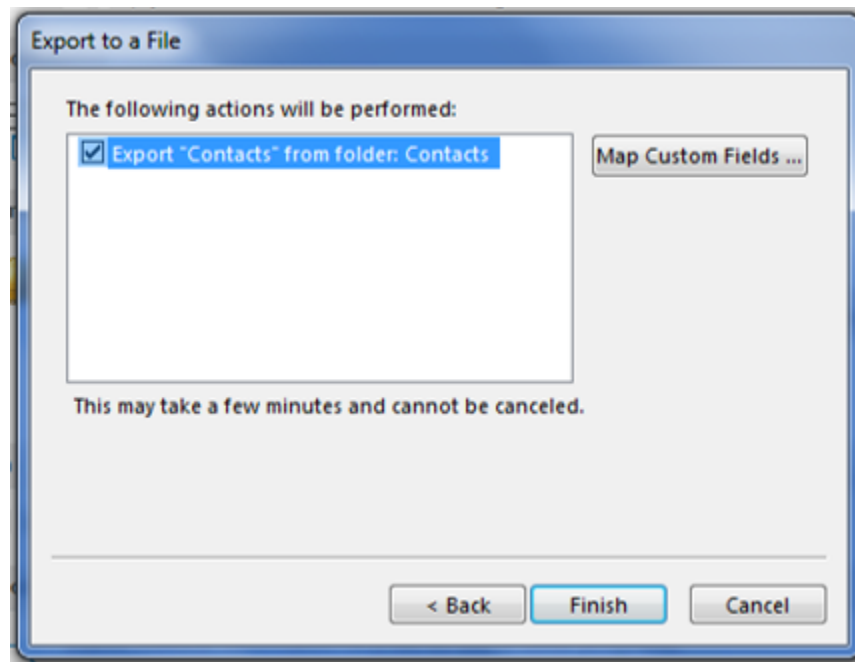

Select **Comma Separated Values**, then **Next.**

Select the source **Contacts,** then **Next.**

Name and save the file where it will be easy to retrieve, then **Next.**

This screen will outline what will be performed as part of the export. If you want to add or delete specific fields, select Map Custom Fields, make your selections then **Finish.**

This spreadsheet will be saved in the chosen location on the computer as a CSV file. Now the file is ready to be imported into Google Contacts.

Importing from Apple Contacts

In OS X, Open Contacts from the Apps folder, select File > Export > Export V Card. Make sure you have All contacts selected or have highlighted the specific items.
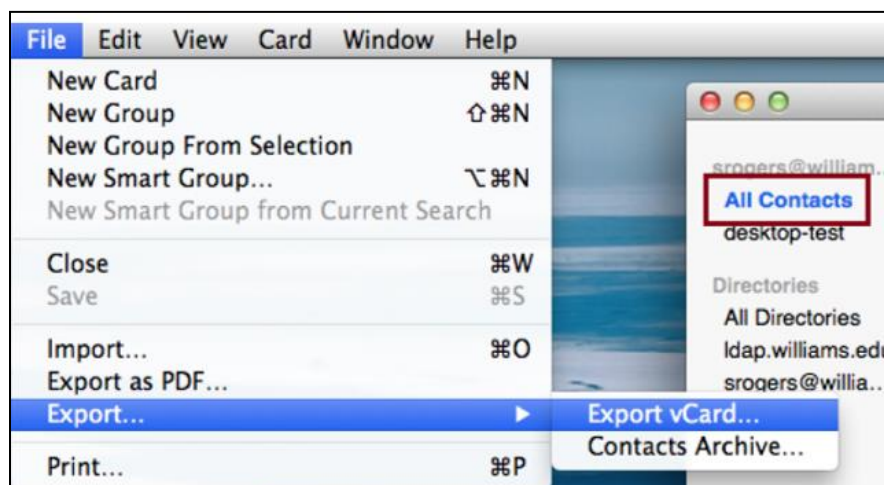
Save the file to your desktop or documents folder to make it easy to find for import.

As I mentioned earlier, the export/import process is universal, so whether you have Salesforce, Top Producer or one of many other CRM tools, its simple to migrate to the other.

Import CSV Files Into Google Contacts

Open Google Contacts from the Apps Launcher. From the menu, select Import Contacts.
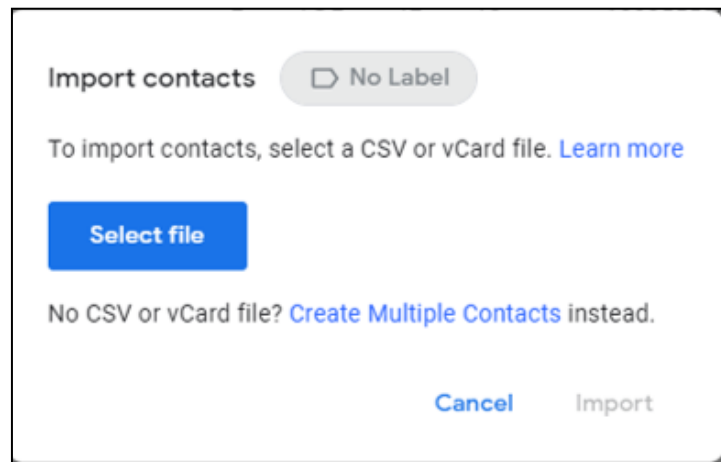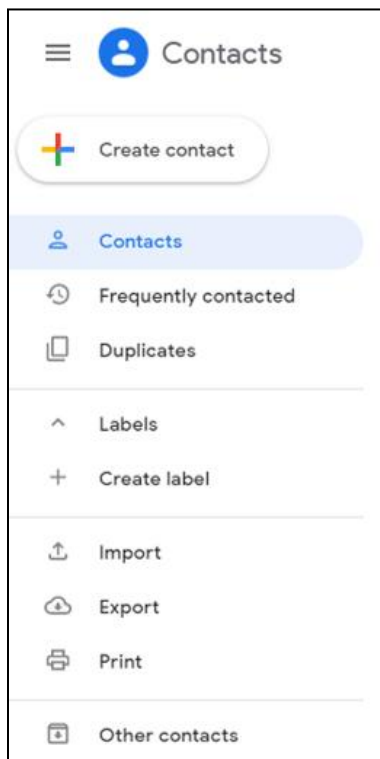
Select the CSV file you saved and select **Import**. The contact information will import into a folder Imported and the date. If your contacts are already in groups, they should import as such. If you create labels beforehand, the contacts will populate
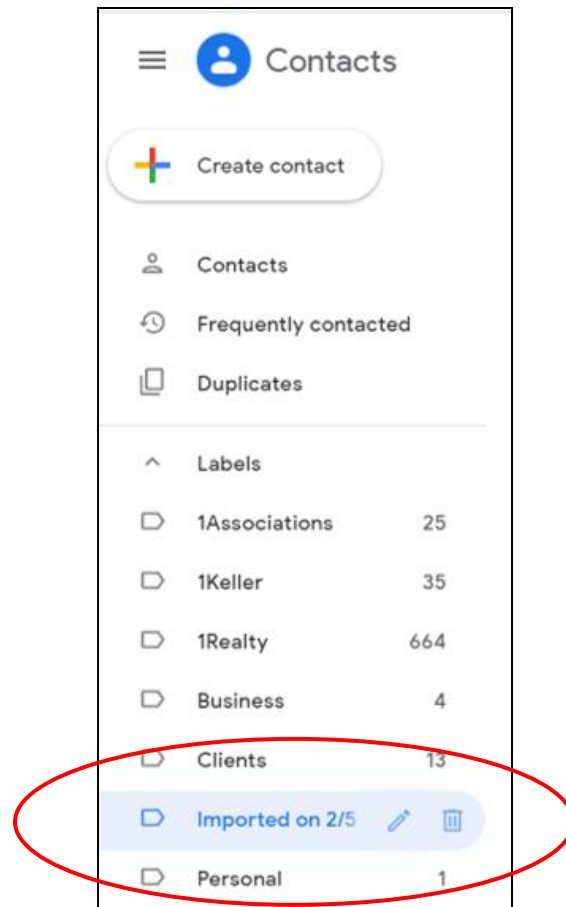
A new feature is adding multiple contacts at once, particularly if they share website or phone information. If you have several contacts from the same company or office, this makes adding each of them easy!

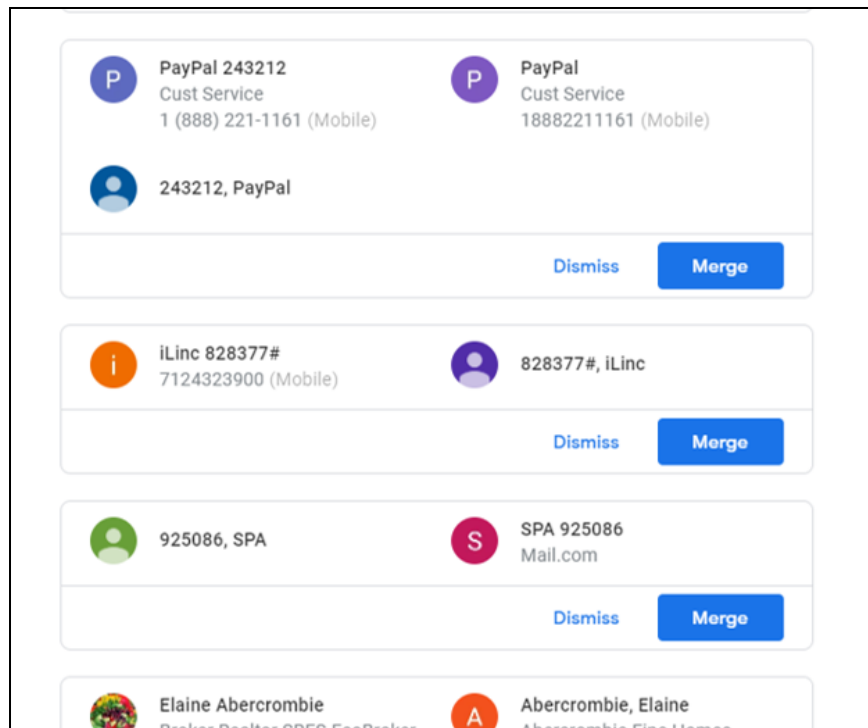Google Contacts will find what looks like duplicate entries and will prompt you to dismiss and keep them as separate entries or merge them. If they are in multiple labels they will remain so.


Add, Edit or Delete Contacts As A Group

Contacts can be moved as a group, added to a label or deleted as a group. If you want to put everyone in a group related in any way to the city of Chicago, for example, start with doing a search for Chicago. Contacts will find the term Chicago in every entry, regardless of where it is. Select the first entry by highlighting to the left and then checking the box that appears. A new menu will display above.

Check the first menu icon to select the entire list. The second icon is for labels. Click and select an existing label or create a new label to add these entries to. They will not move from the existing list. The third icon is an envelope, which opens a Gmail window and will add these entries' email address. Since they are populated in the "TO' box I suggest cutting all of the addresses and pasting them into the "BCC" box to assure a blind carbon copy.

The three vertical dots hold a menu as well. Here you can print, export, hide from contacts or delete any of the selected entries.
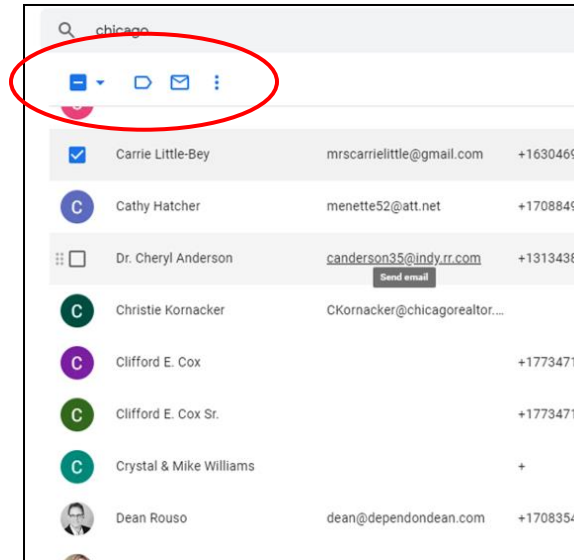
Sync Your Contacts between Google Contacts and Mobile Devices

Having your organized contacts on your smartphone and tablet is the central piece to your mobile office solution. These contacts should be synchronized so any changes made from either side will soon be on all connected devices.

Sync to Android Phones and Tablets

When you set up your Google account on Android phones, the sync to contacts will be seamless and automatic. The frequency of the sync often relies on phone signal or if connected to Wi-Fi. With Android phones, the contacts app will sync the labels the same as the desktop version.
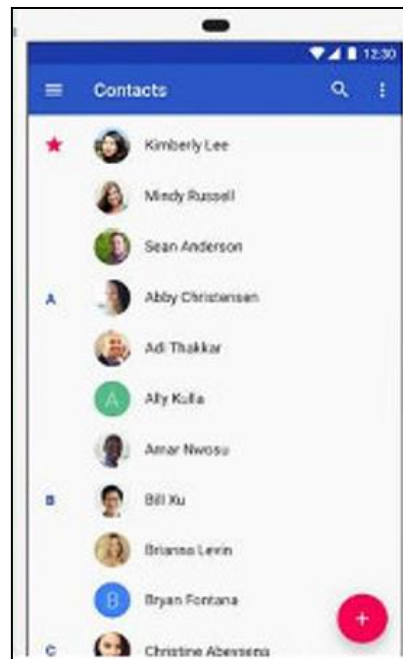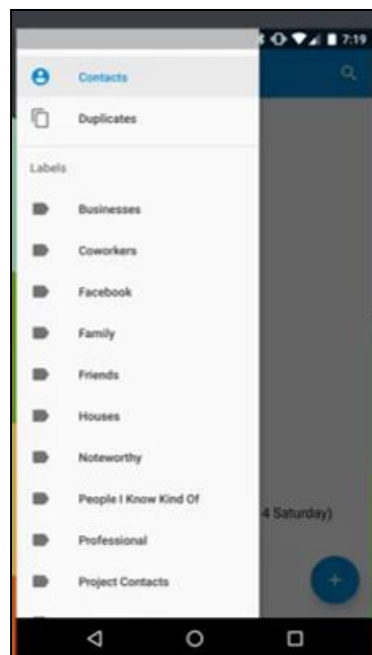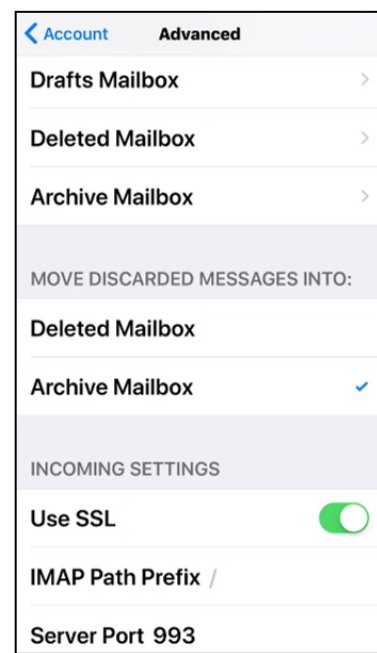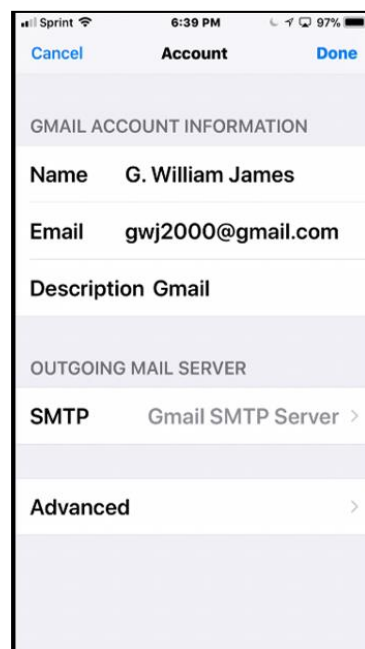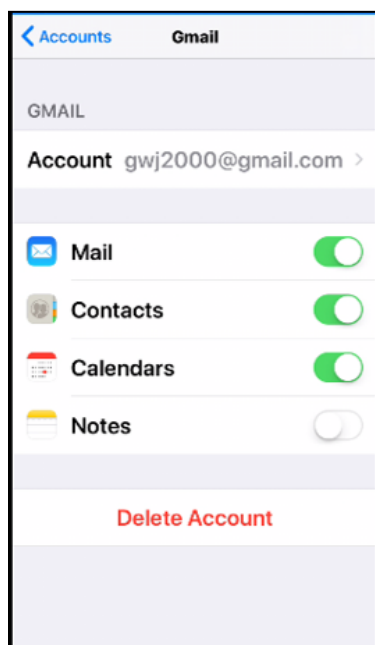
Sync to iPhone and iPad Using Apple Mail

Users of Apple iPhones and iPads have multiple options for synchronizing their contacts to Google. Taking advantage of the built-in contacts is one and can be easily done in settings. The other is to install Google Contacts from the App store.

The iOS contacts app is set up in Settings.

- Open Settings > Accounts & Passwords > Add Account

- Select Google and sign into your Google account.

- Turn on to sync Mail, Contacts and Calendars

- Tap onto your account name to get to the next screen

- Select Advanced, set your mailbox (where Drafts, Deleted and Archived mail goes)

- Press Account, then Done. The account after a short time will begin to sync.
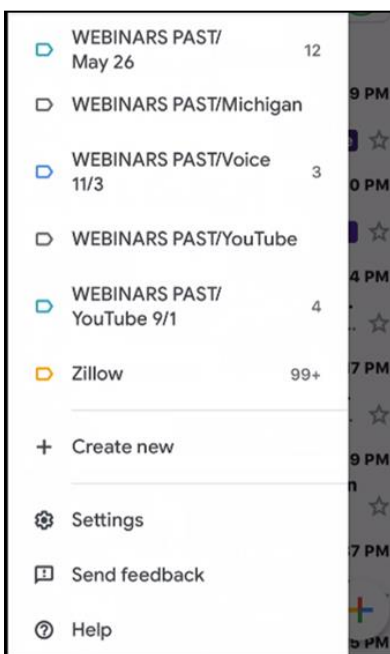
Sync to iPhone and iPad Using The Google Contacts App

Install the Google Contacts app to use instead of the Apple Mail app. Once you set up the account on the app, your email will display very closely to what you see on Gmail desktop.
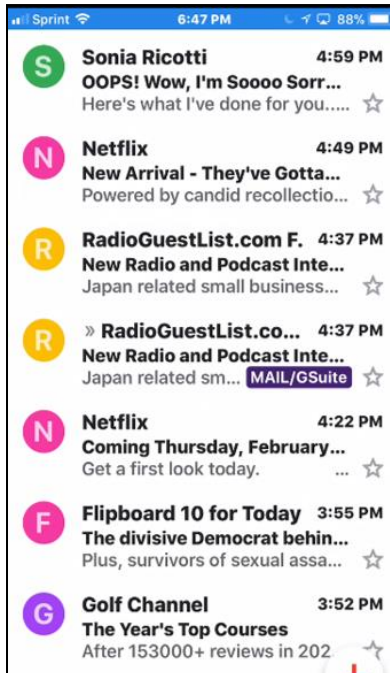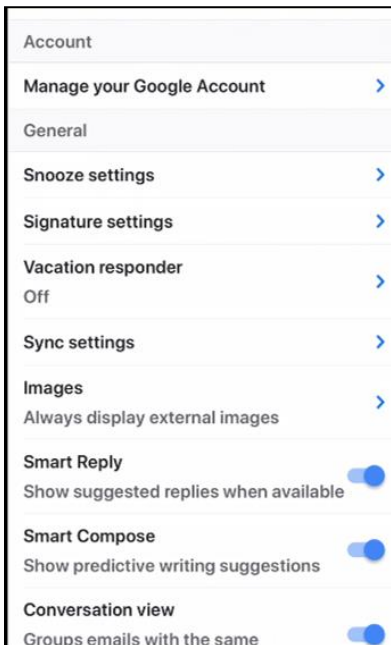

To set up the account, start by tapping onto the horizontal lines in the top left corner:

Select **settings** from the menu. You can now customize your mobile email experience.

In Settings, tap each section and set your preferences for each feature.

Here you can add multiple Gmail accounts, setting email snooze times, add your mobile signature, vacation responder, and how the app will sync with the Google server.

Contacts Power Tip

For iPhone Users Only
How to Save Device Space In Email

To minimize how much email takes up space on your iPhone or iPad, follow these steps to customize Gmail delivery in Apple Mail. You must have the Gmail app installed and set up first.

- Go to Settings
- Select Accounts and Passwords
- Select the Gmail account (if you have previously done so)
- Tap on the account address
- Select Advanced
- Find Incoming Settings, turn OFF the "Use SSL" selection
- Tap Account in the Upper left corner
- Select Done.

What this feature does is prevents Gmail from coming into the Apple Mail App. You are receiving this mail from the Gmail app. Other apps that can utilize sending email from your iPhone will continue to work.