Email sync (GMAIL and Microsoft)%

See all of your emails in the contact record view, giving you the most comprehensive, upto-date communication trail possible. There are a few ways to setup your email sync.

Pro-Tips!

- If you are syncing a Microsoft email, your email must be hosted by Microsoft. It is possible to use an email not hosted by Microsoft in applications such as Microsoft Outlook, so double-check where your email is hosted if you encounter errors with a Microsoft email.
- All Microsoft accounts <u>except for Exchange</u> servers will work
- Supported Microsoft email services: hotmail.com, live.com, msn.com, outlook.com, Exchange Online, Office 365 and Passport.com
- No past emails will get synced retroactively
- Emails FROM outlook will be automatically saved to Infusionsoft
- The system will sync every 5 to 10 minutes. If there is nothing to sync it will read "last synced x days ago" which is not the last time it checked -it checked about 5 to 10 minutes ago, but that is the last time it found something to sync.

Sync setup through your profile



1. From the top back bar, hover over the person icon and click "Edit My Profile"

Save	Edit User Permis	ssions	Deactivat	e Your Account	
Follow	-Up Sequence	Mail A	accounts	Legacy Mail Accounts	Pluç
Please sel	lect one	•	Add To Se	lected Follow-Up Sequence	•

2. Scroll down to "Mail Accounts"

Follow-Up Sequence	Mail Accounts	gacy Mail Accounts Plugins	
			Sync Email Account
Name		Last Synced	Actions
	Sync an em	No email accounts have been added. ail account to see your email history on contact records.	

- 3. Click "Sync Email Account"
- 4. Select with provider you are syncing with and follow the steps to authorize sync

Sync setup from contacts interactive view

1. Navigate to the Contacts page under CRM



2. Run a contact search or select a save search

Contacts 🗸	Companies 💙	Opportunities ¥	Referral Partners
Conta	cts		
Actions 🔻	New Search	\leftarrow	Save F
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int		Saved Searches.	
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Email: Tuninrain	୪୪୪ଌyanoo.com		

3. Click the Email tab on the interactive view toolbar under any Contact



4. Click 'Sync Email Account' button

Person Typ	e:			
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				close
		Sync Email	Account Co	mpose
	User			

Sync within the contact record

1. Navigate to the Contacts page under CRM navigation option

	My Nav	💽 My Nav 🔒	
	MY NAV	CRM	ARKE
	Dashboard	Contacts	palgn Builder
board	My Day	Companies	Email & Broadcasts
ibouru		Opportunities	Lead Generation
		Referral Partners	Templates
		Visitors	Legacy

2. Run a contact search or select a save search

Contacts 🗸	Companies 💙	Opportunities ¥	Referral Partners
Contac	ts		
Actions •	New Search		Save
□ 1-20) of 242		< 1 2

L	Saved Searches
	Saved Searches
	Clean List
	Custom
	Duplicate Contacts
	Email Typos
	New Leads
Email: funinrain888@yał	noo.com

3. Click on a contact name link



4. Click on the Tasks tab if it is not already selected & scroll down to the '**Recent Email History**' section



5. Click 'Sync Email Account'



Complete the Google or Microsoft authentication flow

1. Click 'Google email' or 'Outlook email' based on what type of account you want to sync

	Connect an email account	×	page to mo
	Provide even better service with a more complete picture of your interactions.		
	Outlook email		.
Deactivat	Not	now	

	errronie.jsp			12 Incognito
Company			Fax1 Work •	
Title			Fax 2 Work v	
Email	Support@alwayshelpful.org	\mathbf{x}	Website 3	
Email Addroce 2	Status: UnconfirmedManage Em	ail Status	Country Please select a country •	
Email Address 2			Emeil Signature	
Address				
Street Address 1			Signature image	
Street Address 2			Aemove	
City			Lies the other fields on this page to modify the information that appears	
State			In this email signature	
Postal Code			Signature Preview	
Save Edit L	Jser Permissions Deactivate You	ur Account		
Follow-Up Sec	Mail Accounts Le	gacy Mail Accounts	Plugins	
Name			Last Synced Actions	
	Sync an en	No email acco nail account to see	ints have been added. your email history on contact records.	