

# Email sync (GMAIL and Microsoft)🔗

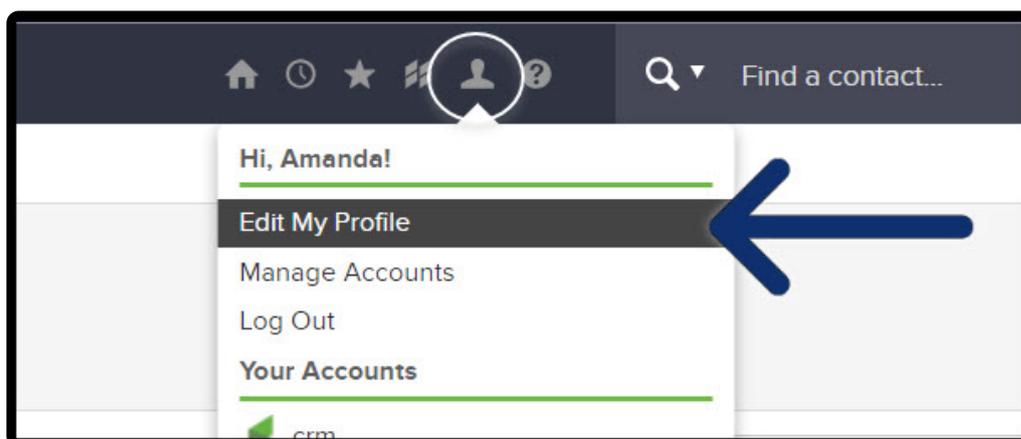
See all of your emails in the contact record view, giving you the most comprehensive, up-to-date communication trail possible. There are a few ways to setup your email sync.

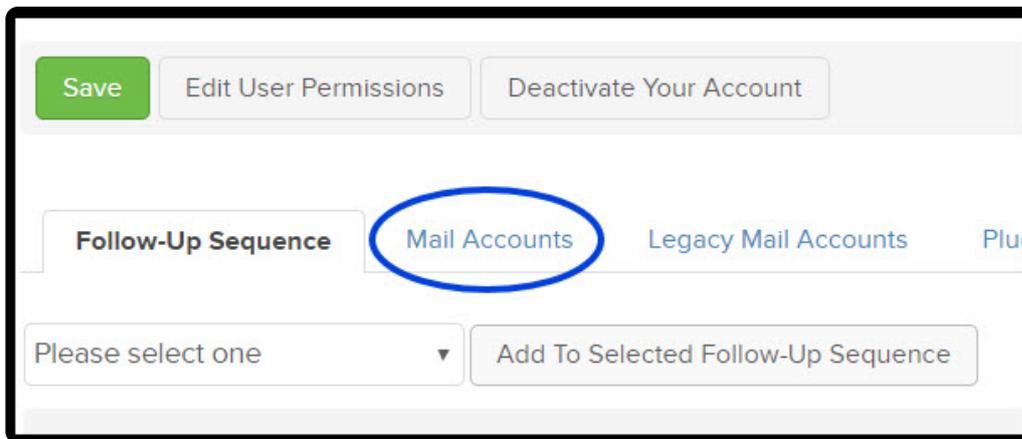
## Pro-Tips!

- 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 except for Exchange 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.

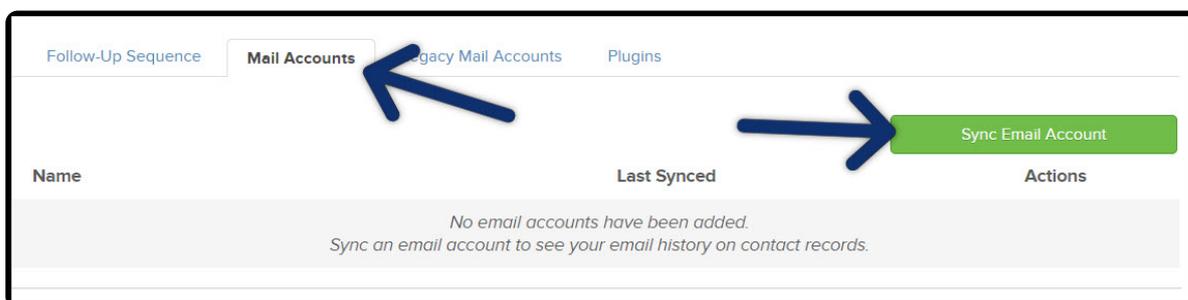
## Sync setup through your profile

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





2. Scroll down to "Mail Accounts"

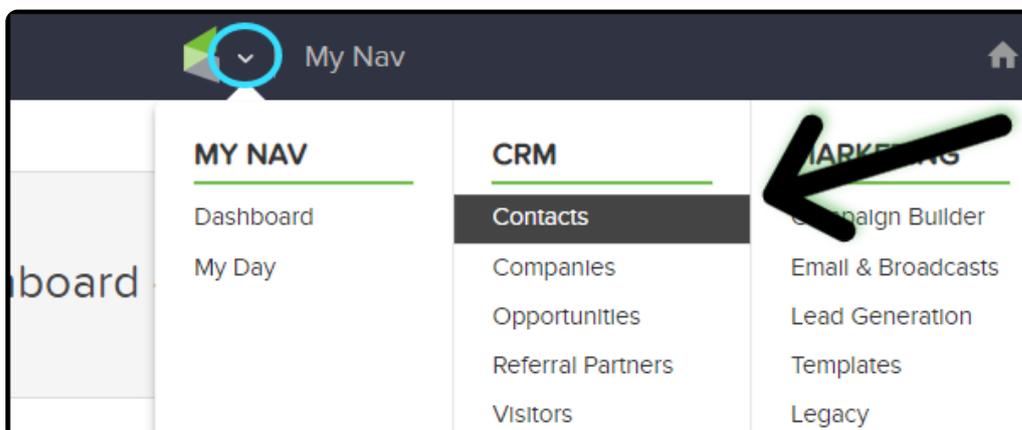


3. Click "Sync Email Account"

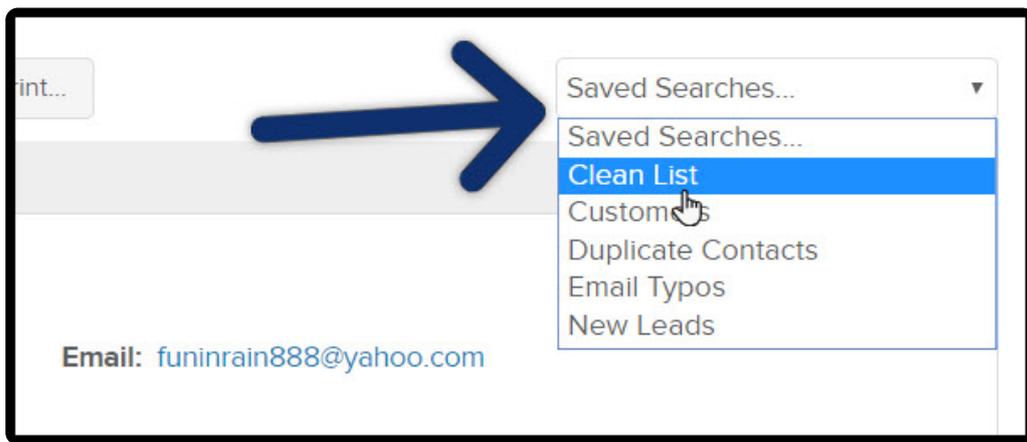
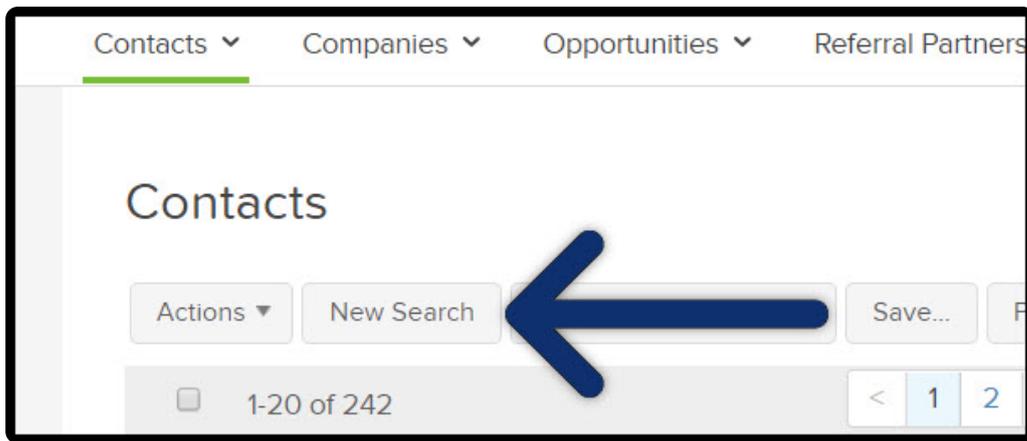
4. Select with provider you are syncing with and follow the steps to authorize sync

## Sync setup from contacts interactive view

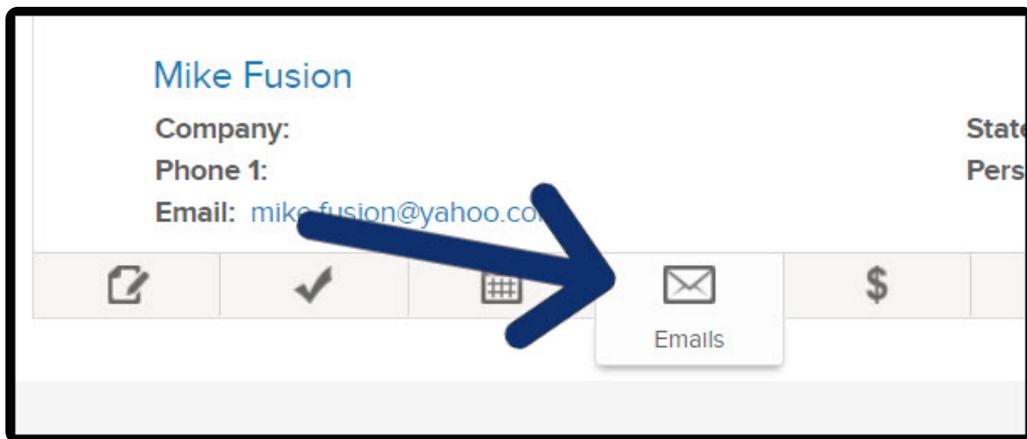
1. Navigate to the Contacts page under CRM



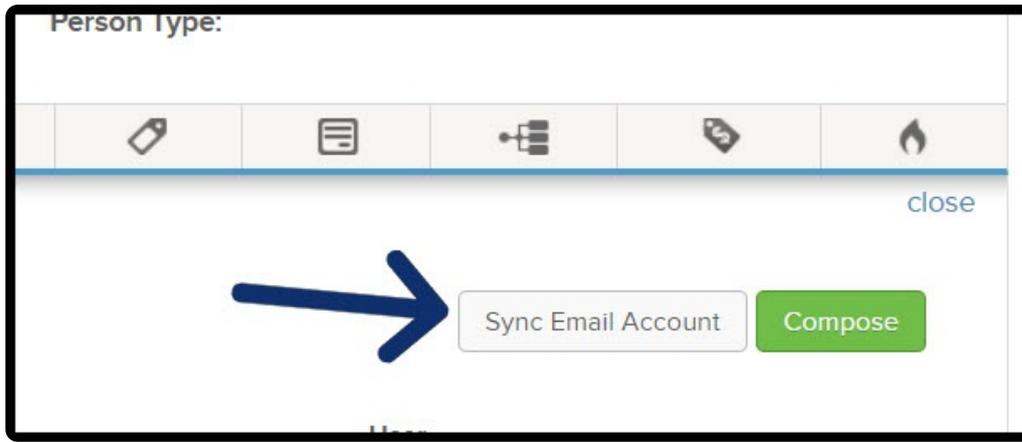
2. Run a contact search or select a save search



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

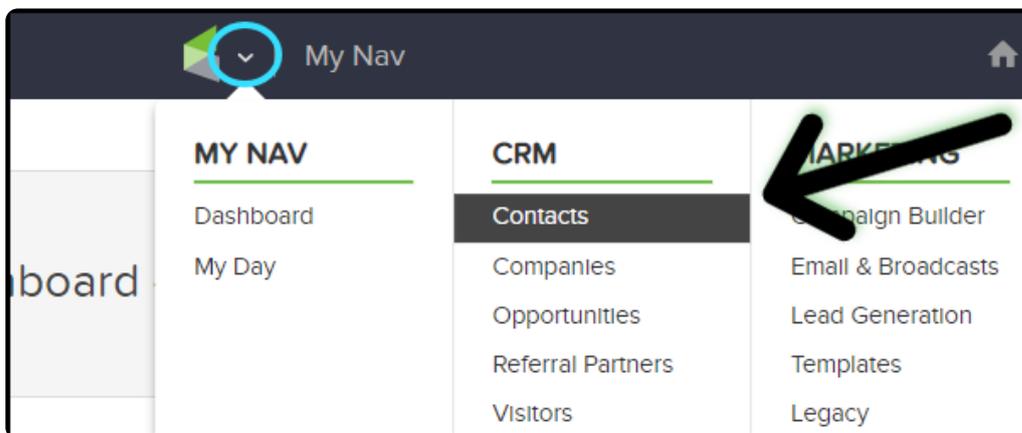


4. Click 'Sync Email Account' button

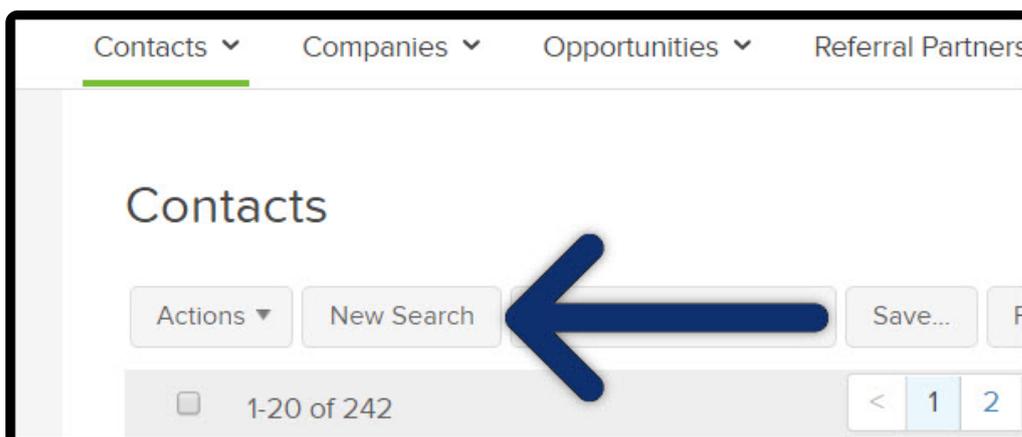


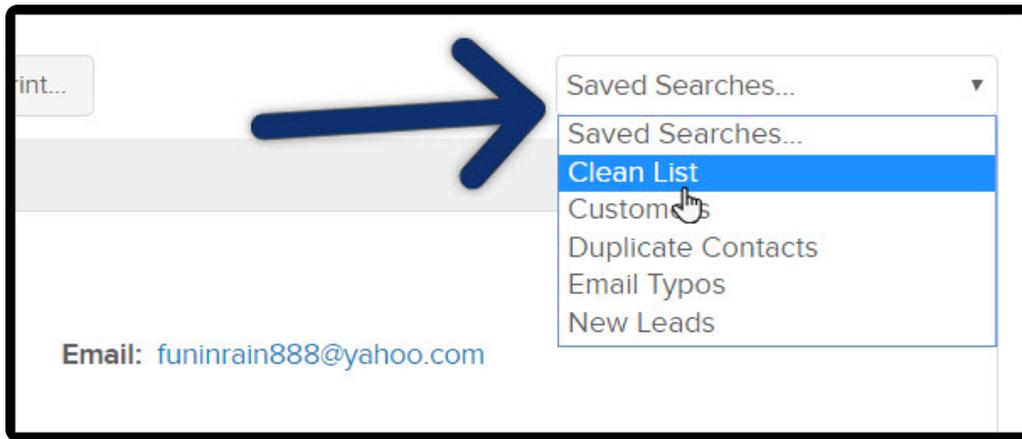
## Sync within the contact record

1. Navigate to the Contacts page under CRM navigation option

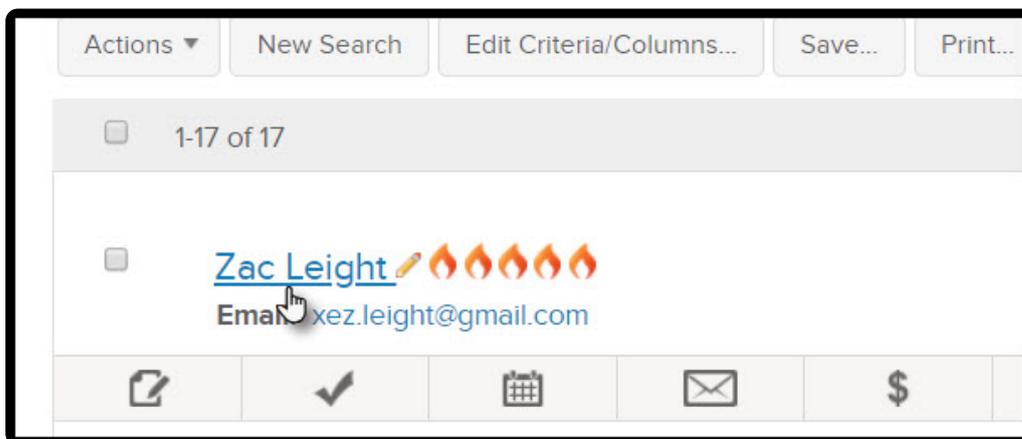


2. Run a contact search or select a save search

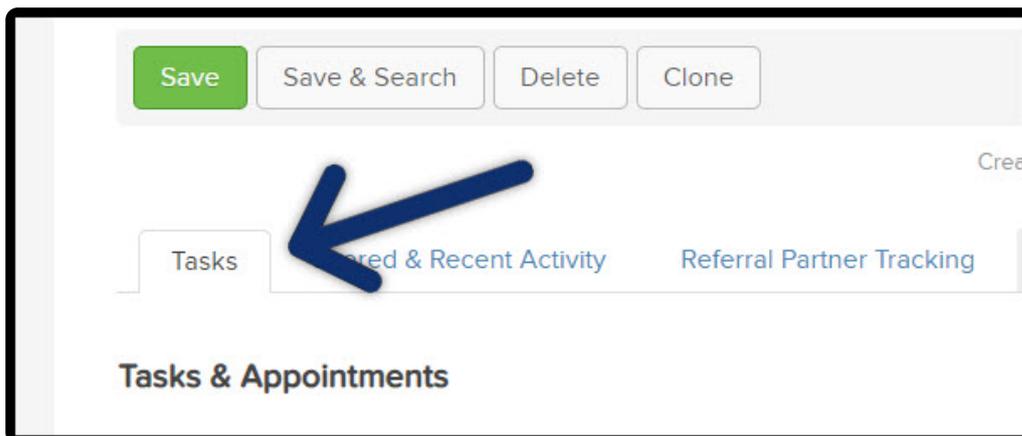




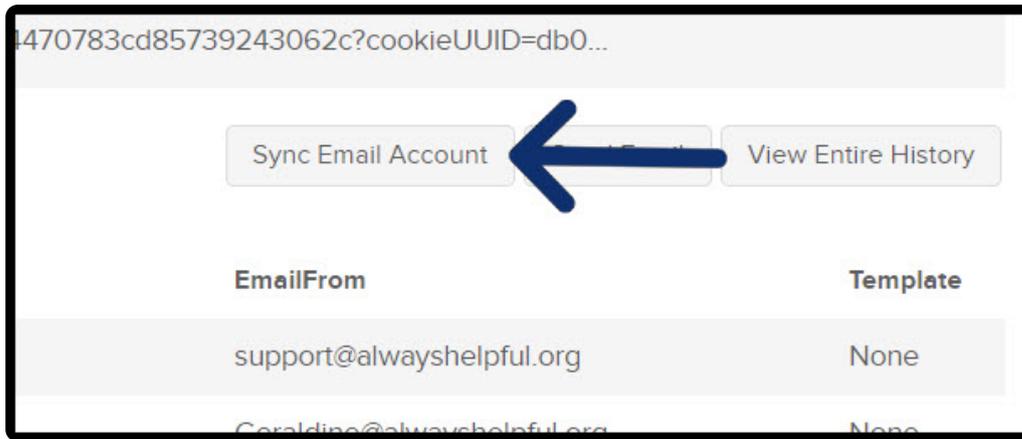
3. Click on a contact name link



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

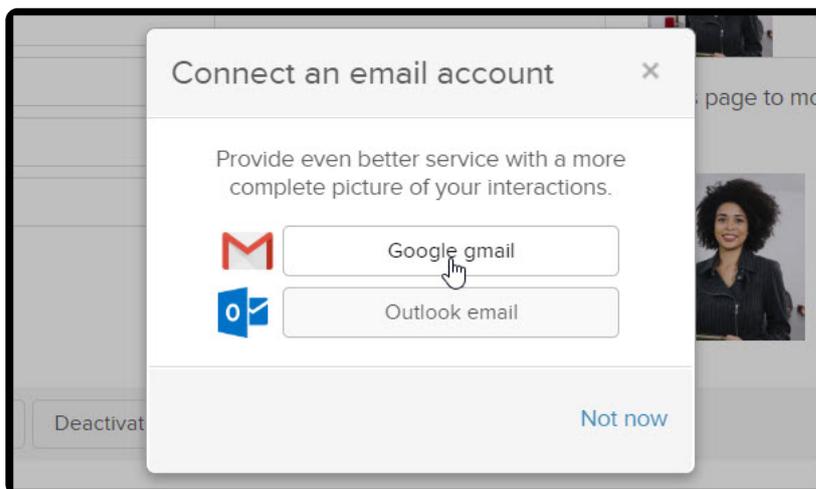


5. Click 'Sync Email Account'



## Complete the Google or Microsoft authentication flow

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



Browser window showing the "Add/Edit User Accounts" page for "dt686.infusionsoft.com/Admin/editUserProfile.jsp".

**Form Fields:**

- Company:
- Title:
- Email:  [✉](#)
- Status: UnconfirmedManage Email Status...
- Email Address 2:
- Address:
  - Street Address 1:
  - Street Address 2:
  - City:
  - State:
  - Postal Code:
- Fax 1: Work
- Fax 2: Work
- Website:
- Country: Please select a country

**Email Signature:**

Signature Image:  [Remove](#)

Use the other fields on this page to modify the information that appears in this email signature.

Signature Preview: 

**Buttons:** Save, Edit User Permissions, Deactivate Your Account

**Navigation:** Follow-Up Sequence, **Mail Accounts**, Legacy Mail Accounts, Plugins

**Sync Email Account:** [Sync Email Account](#)

| Name  | Last Synced | Actions |
|---|-------------|---------|
| <i>No email accounts have been added.<br/>Sync an email account to see your email history on contact records.</i> |             |         |

Click to view larger