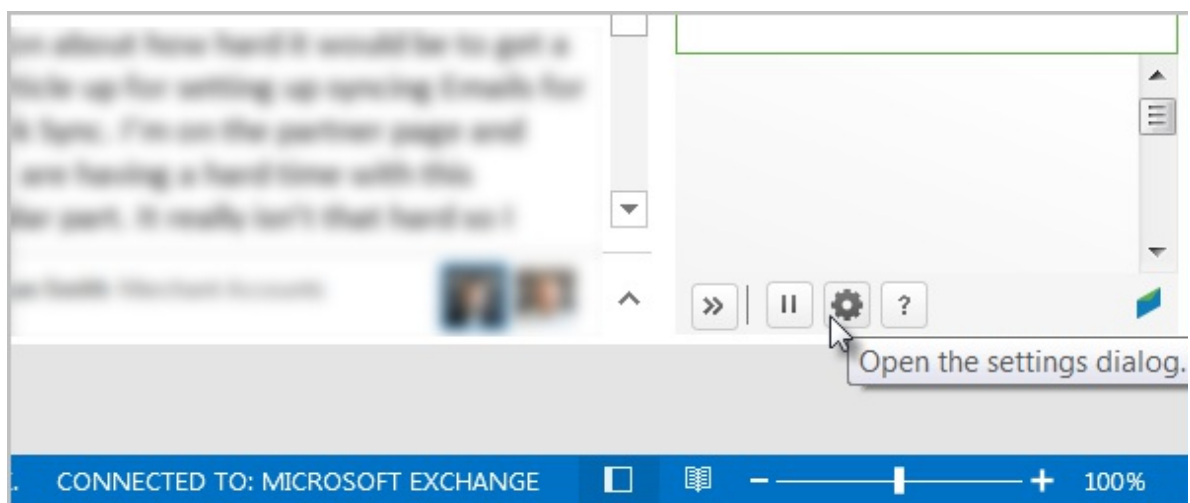


Synchronize Tasks And Appointments Between Infusionsoft And Outlook

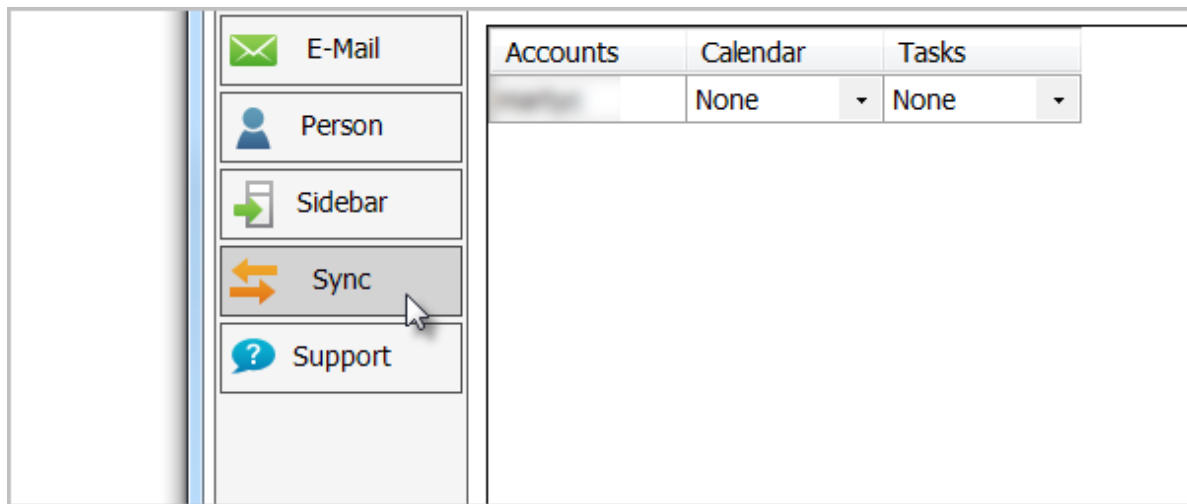
Please note the following:

- Syncing is turned off by default
- Recurring tasks and appointments will sync, but the "recurrence information" will not sync. Instead of being linked in a recurring set, each task and appointment will look separate and unique. Any options configured in the recurring tab for Tasks/Appointments in Infusionsoft will not sync to Outlook and vice versa.
- Reminders will not be synced.
- Appointments will be synced 31 days forward and tasks will be synced 7 days forward. If an appointment or task falls outside of those parameters, it will not sync until it comes within those parameters.
- The sync option will only be visible if you're running Outlook 2007 or later. Sync functionality is not available for Outlook 2003.
- If you want to delete a series of recurring appointments or tasks, they must be deleted from the source application. If they are not deleted from the source application, you will have to delete them individually.
- Individual items generally take 30 minutes to sync. So please be patient.

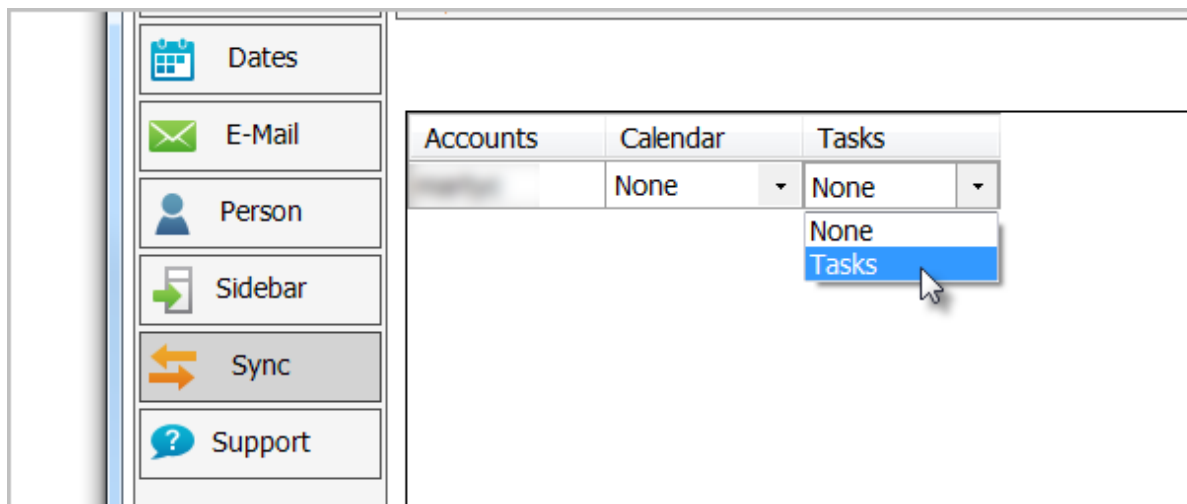
1. Open the settings menu by clicking the gear icon at the bottom of the sidebar.



2. Click **Sync** on the left side of the window.



3. Choose the Infusionsoft account (if you have more than one), then select what you would like to sync.



4. Click the OK button at the bottom.