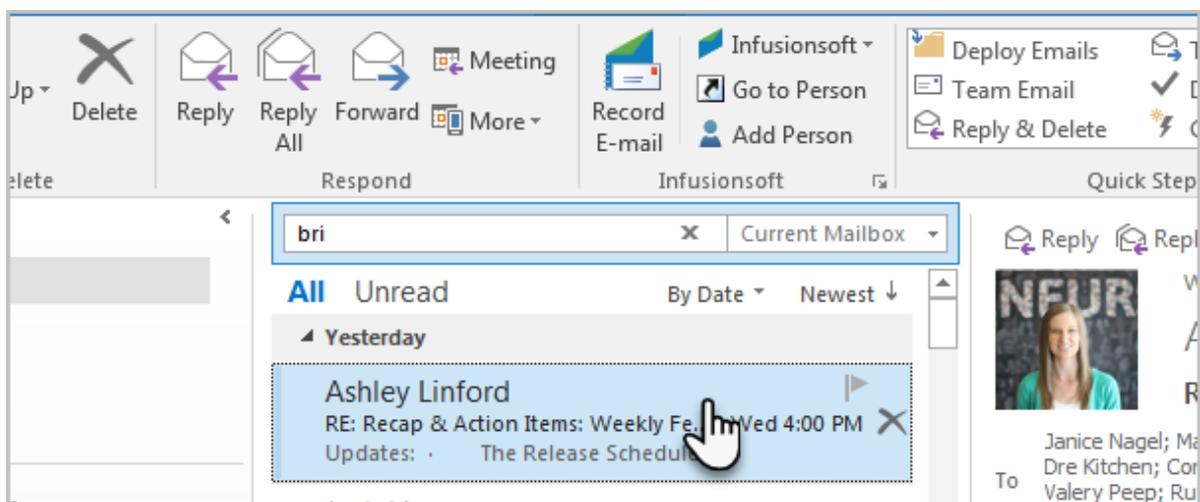


Record an Email in Infusionsoft Using the Outlook Plugin

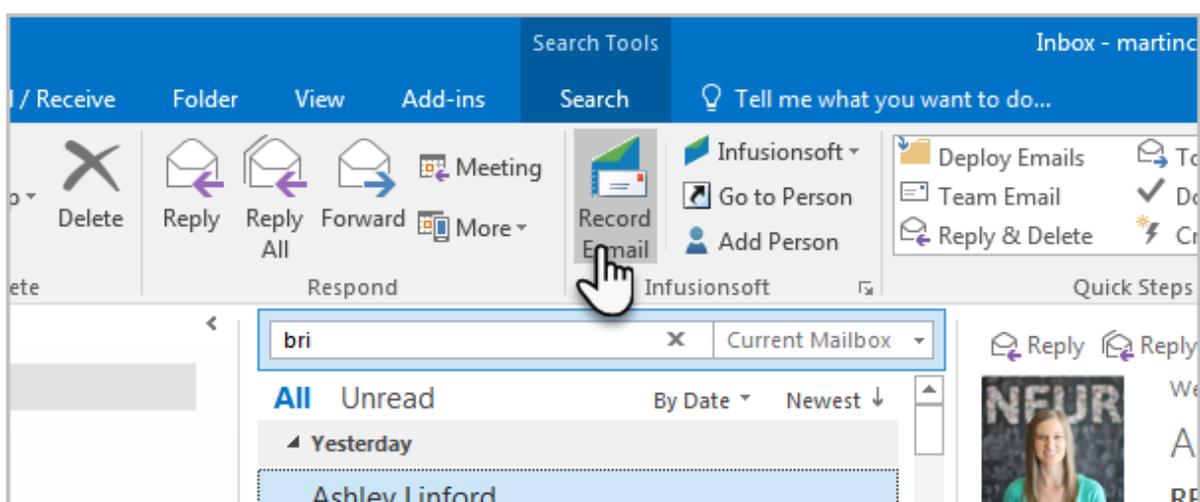
The Infusionsoft [Outlook Sync](#) allows you to record emails from Outlook into your Infusionsoft app. You can do this while browsing through your emails in Outlook or when sending an email from Outlook.

To record an email into Infusionsoft while browsing your inbox:

1. Select the email you want to save to Infusionsoft



2. Click the Record Email button



3. Infusionsoft will try to find the contact in Infusionsoft. If there is no match, you can click the **Add New** button to create the contact record.

Infusionsoft.

Record e-mail to Infusionsoft. Set Outlook Reminder

Use the options below to record the e-mail to Infusionsoft

FROM	✗ Ashley Linford	Unable to locate this e-mail address in Infusionsoft
	<input type="text"/>	<input type="button" value="Search by Name"/> <input type="button" value="+ Add New"/>
TO	✗ Conrad Wredberg	Unable to locate this e-mail address in Infusionsoft
	<input type="text"/>	<input type="button" value="Search by Name"/> <input type="button" value="+ Add New"/>
TO	✗ Mike Hilton	Unable to locate this e-mail address in Infusionsoft
	<input type="text"/>	<input type="button" value="Search by Name"/> <input type="button" value="+ Add New"/>

- After clicking Add New, you can provide any further personal details prior to saving the contact in Infusionsoft.

FROM

First name	<input type="text" value="Ashley"/>	Company	<input type="text"/>
Last name	<input type="text" value="Linford"/>	Website	<input type="text"/>
E-mail	<input type="text"/>	Address 1	<input type="text"/>
	<input checked="" type="checkbox"/> I have Permission to send marketing to this address.	Address 2	<input type="text"/>
Work phone	<input type="text"/>	City	<input type="text"/>
Mobile phone	<input type="text"/>	State/Province	<input type="text"/>
Fax	<input type="text"/>	Postal code	<input type="text"/>
Job Title	<input type="text"/>	Country	<input type="text" value="United States"/>

- The checkbox indicates that the contact has been added to Infusionsoft. You can now record the email to their contact record.

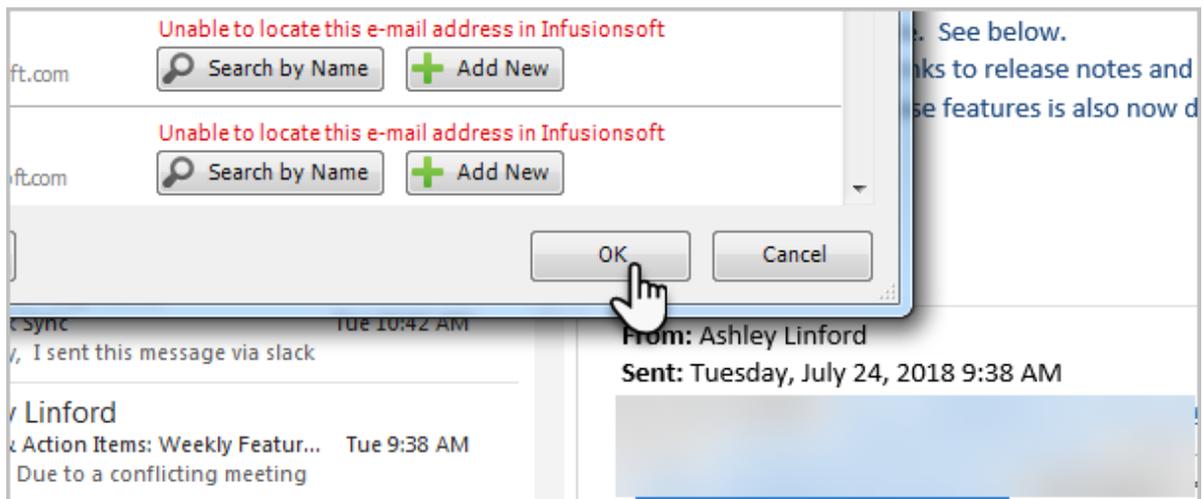
Infusionsoft.

Record e-mail to Infusionsoft. Set Outlook Reminder

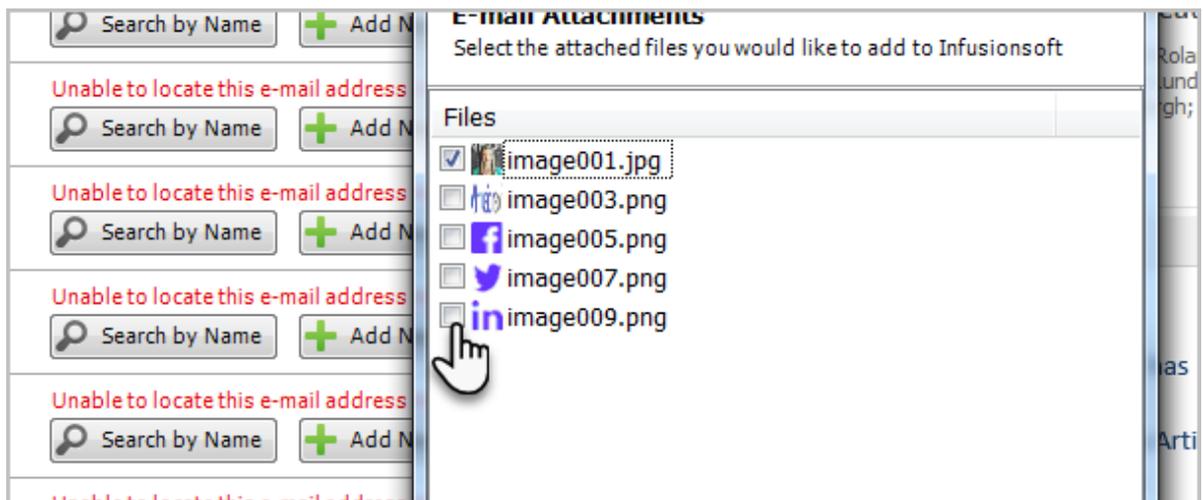
Use the options below to record the e-mail to Infusionsoft

FROM	✓ Ashley Linford	<input checked="" type="checkbox"/> Record to Infusionsoft?	<input checked="" type="checkbox"/> Include attachments?	<input type="button" value="Schedule Follow-up Task"/>
	<input type="text"/>			
TO	✗ Conrad Wredberg	Unable to locate this e-mail address in Infusionsoft		
	<input type="text"/>	<input type="button" value="Search by Name"/> <input type="button" value="+ Add New"/>		
TO	✗ Mike Hilton	Unable to locate this e-mail address in Infusionsoft		
	<input type="text"/>	<input type="button" value="Search by Name"/> <input type="button" value="+ Add New"/>		

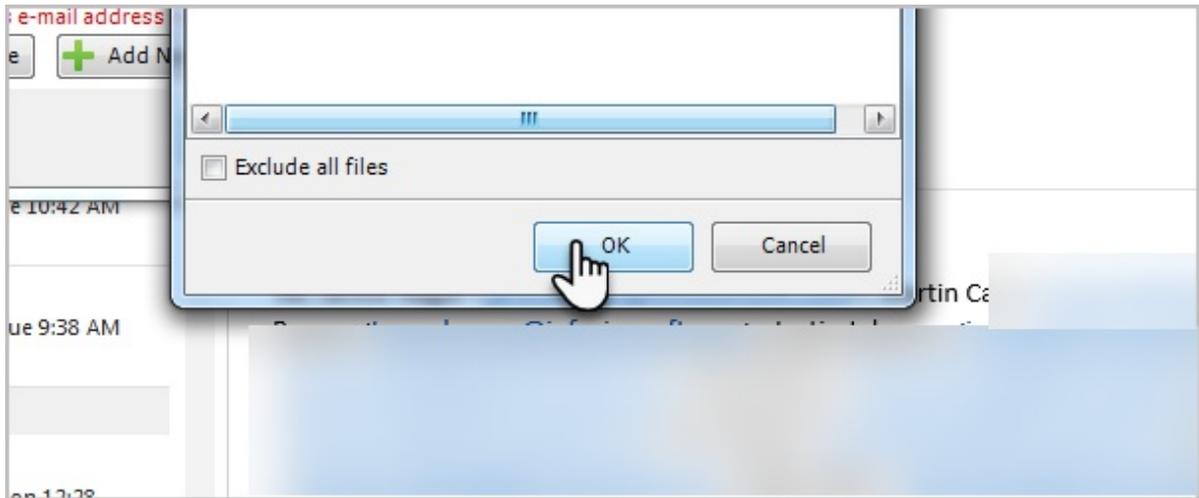
6. Click OK



7. You can choose to download any files that were present in the email into the Filebox on their contact record.



8. Click OK



- The email is now recorded into Infusionsoft. You can now log into Infusionsoft and find the contact and the email that you just recorded.

