## 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         Set Outlook Reminder				
FROM	×	Ashley Linford	Unable to locate this e-mail address in Infusionsoft  Search by Name  Add New		
то	×	Conrad Wredberg	Unable to locate this e-mail Create a new person in Infusions Search by Name Add New		
TO	×	Mike Hilton	Unable to locate this e-mail address in Infusions oft Search by Name		

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

	i nachume	паніс у	company
	Last name	Linford	Website
	E-mail		Address 1
		I have Permission to send marketing to this address.	Address 2
	Work phone		City
	Mobile phone		State/Province 👻
	Fax		Postal code
_	Job Title		Country United States 💌
I NOW			+ Add to Infusid soft O Cancel

5. 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. Use the options below to record the e-mail to Infusionsoft					
FROM	✓ Ashley Linford	<ul> <li>Record to Infusionsoft?</li> <li>Include attachments?</li> <li>Schedule Follow-up Task -</li> </ul>			
TO	X Conrad Wredberg	Unable to locate this e-mail address in Infusionsoft Search by Name			
Q	🗙 Mike Hilton	Unable to locate this e-mail address in Infusionsoft Search by Name 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

e e-mail address	
	Exclude all files
e 10:42 AM	Cancel
ue 9:38 AM	
on 12:29	

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

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ies 🗸	2 Ashley Linford		
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Sent	Status	Subject				
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