Install Infusionsoft Sync For Outlooks

Note that this is not compatible with Outlook for Mac

Important! We strongly recommend using the new **Email Sync** tool that is built-in to Infusionsoft and automatically syncs either an Outlook or Gmail account with your Infusionsoft application.

With the plugin, you will be able to do the following from Outlook:

- View contact information stored in Infusionsoft
- Add a new person to Infusionsoft
- Apply or Remove Tags from an Infusionsoft contact record
- Start or Stop a Follow-Up Sequence for an Infusionsoft contact
- Record email communications to Infusionsoft
- Schedule Tasks and Appointments in Infusionsoft
- 1. Before beginning the installation process, be sure to close Microsoft Outlook.
- 2. Click here to access Infusionsoft Sync for Outlook in the marketplace.
- 3. Click the **Get the App** button at the bottom of that page.



- 4. Follow the instructions on the page to download the Outlook Plugin.
- 5. Run the application to install the plugin to your computer

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6. Once the installation is complete, Open Outlook to begin using the Infusionsoft Sync sidebar