

Infusionsoft Sidebar

Gmail Sync is no longer available. Please use the [Email Sync tool](#) that automatically syncs Gmail and Microsoft accounts to your Infusionsoft app.

The power of Infusionsoft, right where you already work. Access your Infusionsoft CRM records, add contacts to marketing campaigns, create or complete tasks and automate back office workflows right from the comfort of your email inbox.

Please Note! Infusionsoft Sidebar is an alternative to the Infusionsoft Sync for Gmail app. It does not currently support Email and Calendar syncing. If you currently need these features, please use Infusionsoft Sync for Gmail for the time being. We will notify customers when Calendar and Email syncing is available in the new Infusionsoft Sidebar, as this is planned for a future iteration.

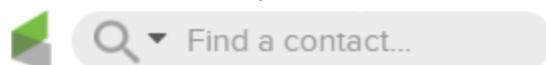
Contacts

Load a contact into the sidebar

1. Hover over the email address in the email or the preview of the email

Search for a contact

1. Use the search bar at the top of the sidebar to search for a contact



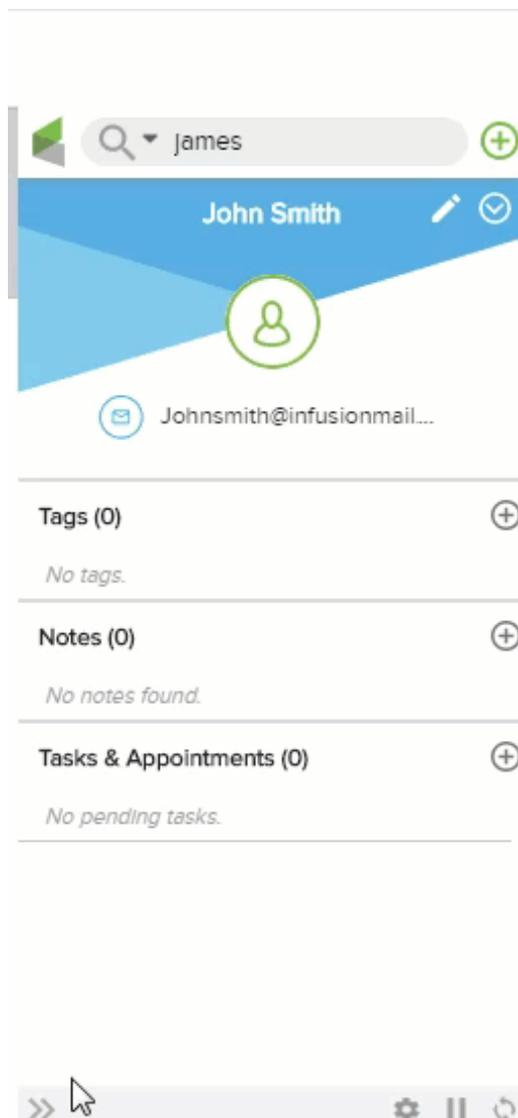
2. Click the dropdown arrow to choose a search option (the search option in bold indicates which search option is currently selected)

- Search by first name
- Search by last name
- Search by first and last name**
- Search by email address
- Search by company

Add a contact

There are two options for adding contacts via the Infusionsoft Sidebar for Email: Manually, or by hovering over an email in the inbox.

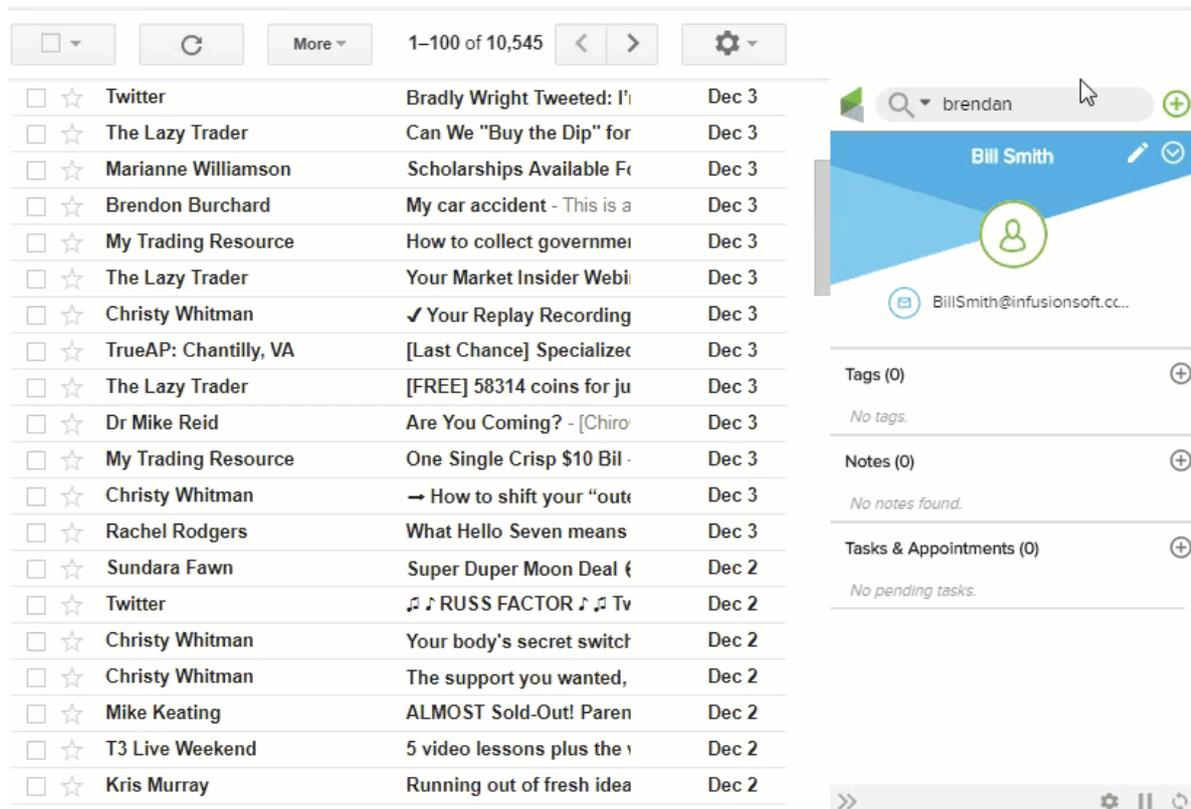
Manually adding a contact



1. click the '+' icon at the top of the sidebar to add a new contact
2. Fill out the 'Add Contact' form in the sidebar with any available information

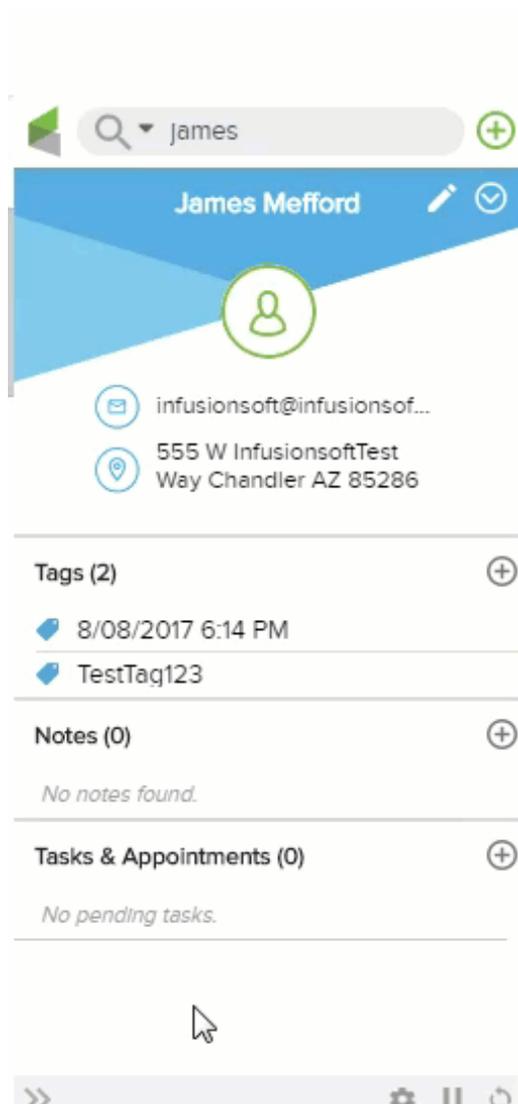
3. Press the 'Add Contact' button at the bottom of the form in the sidebar.

Adding a contact by hovering over an email in the inbox



1. Hover over an email in the inbox. If the contact **already** exists as an Infusionsoft contact, their contact card will automatically load in the sidebar.
2. If the contact does **not** currently exist in your Infusionsoft contact list, the 'Add Contact' form will automatically appear, pre-populated with details from the email in the inbox
3. Review and add any additional information, and press the 'Add Contact' button at the bottom of the form, in the sidebar.

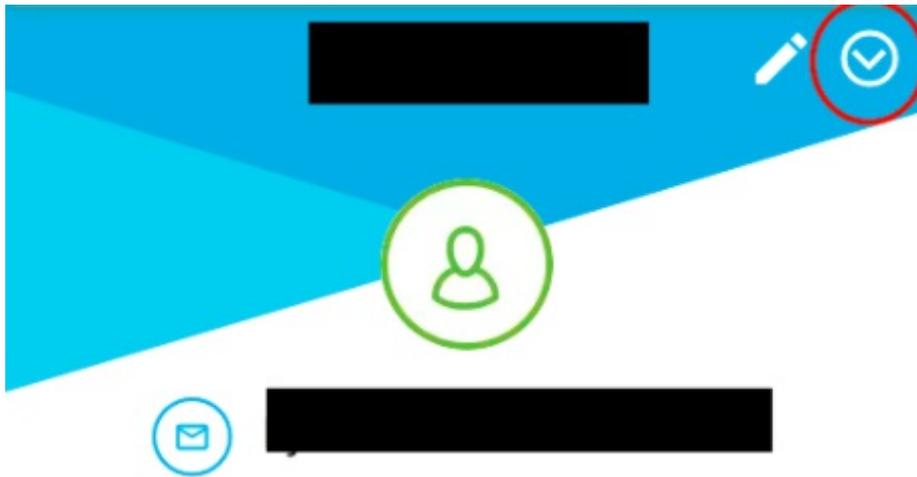
Edit a contact



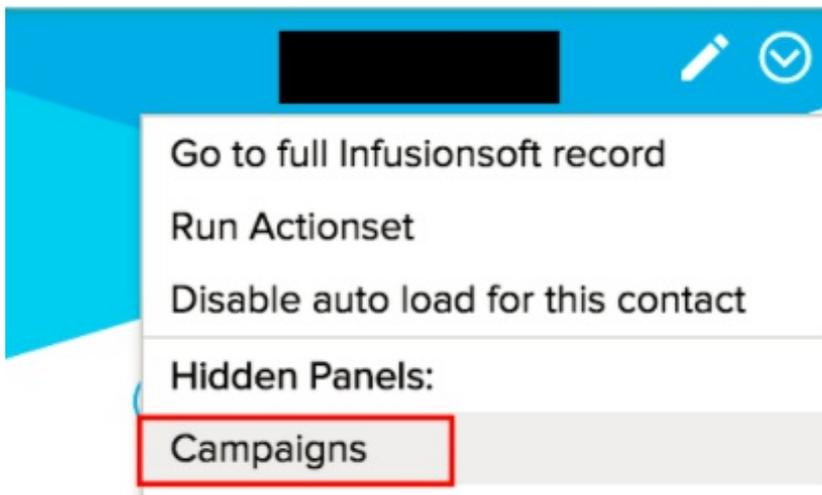
1. Load a contact card into the sidebar
2. Click the 'Edit' icon (pencil) at the top right of the sidebar
3. Make any needed changes to the 'Edit Contact' form
4. Press the 'Update Contact' button at the bottom of the form, in the sidebar.

View Campaign History and Status

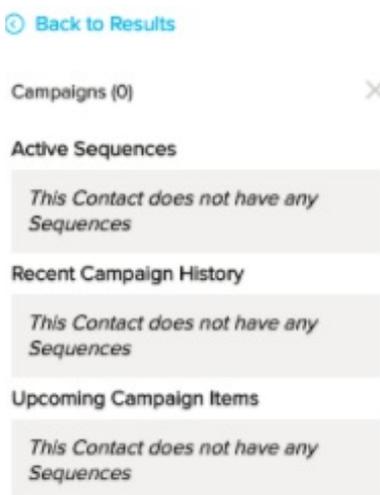
1. When a contact is displayed in the sidebar, Click the drop down arrow, located in the top right corner of the sidebar



2. In the menu, select the 'Campaigns' menu item



3. View your contact's campaign history



Tasks

Add a task

1. Click the '+' icon next to the Tasks & Appointments
2. Add task information

The screenshot shows a mobile application interface for editing a task. At the top, there is a search bar with a magnifying glass icon and the text 'Find a contact...' followed by a green plus icon. Below the search bar is a blue link labeled 'Back to Results'. The main title of the form is 'Edit Task' with a close icon (X) to its right. There are two radio buttons: 'Task' (which is selected with a green checkmark) and 'Appointment'. Below this are two text input fields: 'Description' and 'Notes', both containing the text 'Task'. The 'Task Date' field shows '18/08/2017' and '07:15 PM' with a calendar icon and a dropdown arrow. The 'Completed Date' field has a calendar icon. The 'Action Type' field has a dropdown arrow. The 'Priority' field shows '3. Non-Essential' with a dropdown arrow. The 'User' field shows 'Heather Barry' with a dropdown arrow. At the bottom of the form are three buttons: 'CANCEL', 'DELETE', and 'SAVE' (which is highlighted in green).

3. Click the Save button

Edit a task

1. Click on the task
2. Change any information needed
3. Click the 'Save' button

Delete a task

1. Click on the task
2. Click the 'Delete' button

Appointments

Add an appointment

1. Click the '+' icon next to Tasks & Appointments
2. Add appointment information
3. Click the 'Save' button

Edit an appointment

1. Click on the appointment
2. Change any information needed
3. Click the 'Save' button

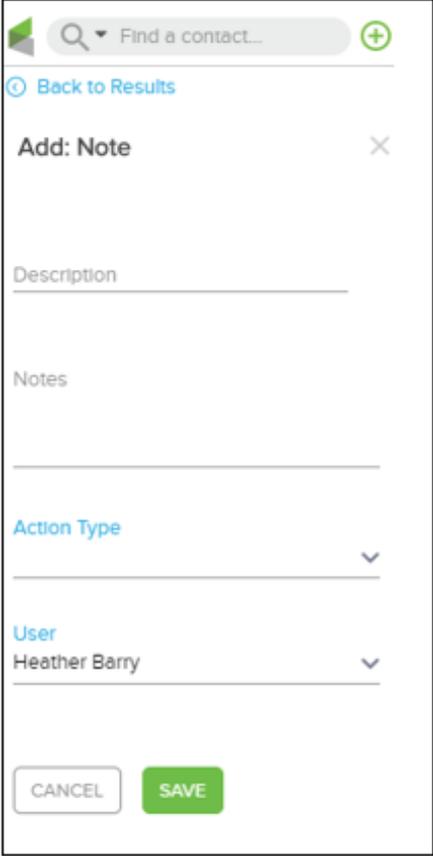
Delete an appointment

1. Click on the appointment
2. Click the 'Delete' button

Notes

Add a note

1. Click the '+' icon next to Notes
2. Add note information



The screenshot shows a mobile application interface for adding a note. At the top, there is a search bar with a magnifying glass icon and the text 'Find a contact...'. To the right of the search bar is a green plus icon. Below the search bar is a blue link that says 'Back to Results'. The main form is titled 'Add: Note' with a close icon (X) to its right. The form contains several fields: a 'Description' field with a horizontal line below it, a 'Notes' field with a horizontal line below it, an 'Action Type' dropdown menu with a downward arrow, and a 'User' dropdown menu with 'Heather Barry' selected and a downward arrow. At the bottom of the form are two buttons: a white 'CANCEL' button and a green 'SAVE' button.

3. Click the 'Save' button

Edit a note

1. Click on the note
2. Change any information needed
3. Click the 'Save' button

Delete a note

1. Click on the note
2. Click the 'Delete' button

Tags

Apply or Create/Apply a tag

1. Click the 'Add Tag' link under the 'Tags' header
2. Choose a tag category
3. Check the tags that need to be applied, or, create a new tag on-the-fly

Opportunities

Add an Opportunity

1. Click the '+' icon next to Opportunities
2. Add the opportunity information
3. Click the 'Save' button

Edit an Opportunity

1. Click the opportunity
2. Change any information needed
3. Click the 'Save' button

Delete an Opportunity

1. Click on the opportunity

2. Click the 'Delete' button

Filebox

Add a file

1. Click the '+' icon next to filebox
2. Click the '+Add Files' button

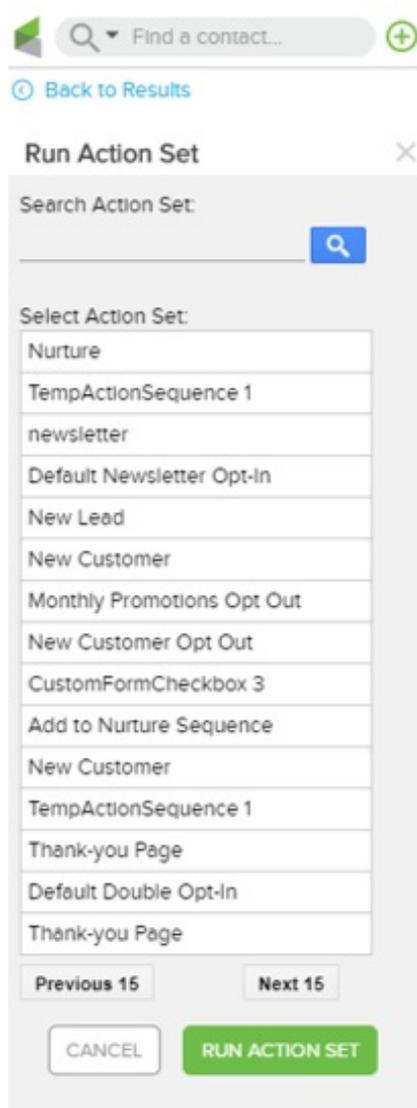
Additional Settings and Features

Go to the full Infusionsoft record

1. Click the menu icon at the top of the sidebar
2. Click 'Go to full Infusionsoft record'

Run Actionset

1. Click the menu icon at the top of the sidebar
2. Click 'Run Actionset'
3. Select an action set from the list (There is also a search function, above the list)



4. Click 'Run Action Set' to apply the selected action set

Disable auto load for this contact

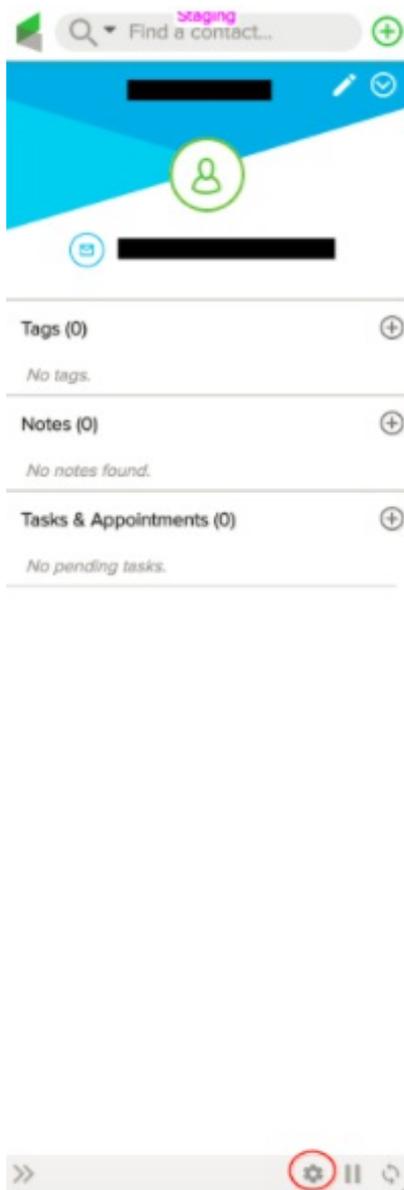
1. Click the menu icon at the top of the sidebar
2. Click 'Disable auto load for this contact'

Enable auto load for this contact

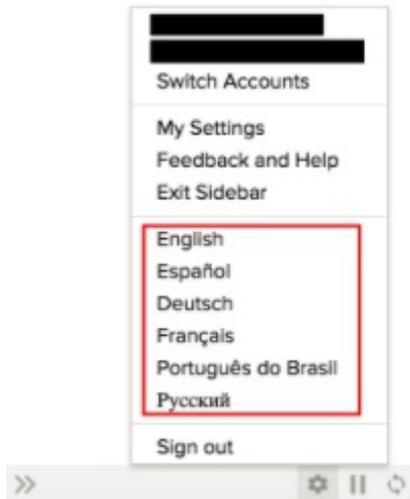
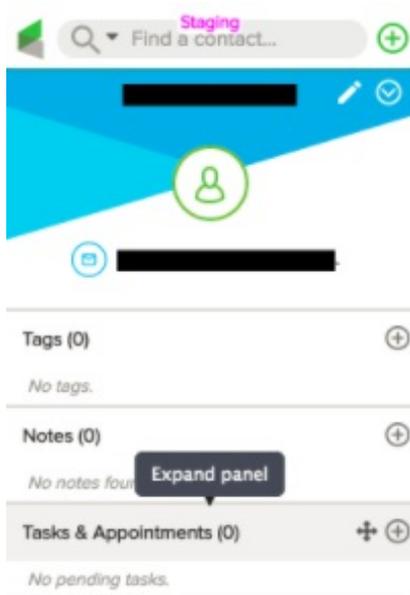
1. Click the menu icon at the top of the sidebar
2. Click 'Enable auto load for this contact'

Change the sidebar language

1. Click the settings icon at the bottom of the sidebar



2. Select one of the 6 supported languages (English, Spanish, German, French, Portuguese, or Russian)



Sidebar Settings

1. Click the settings icon at the bottom of the sidebar
2. click on 'My Settings.'

Customize My Sidebar Tab

Infusionsoft. Sidebar

Customize My Sidebar

Drag each item to reorder elements in your display. Also toggle to hide elements that are not useful to you.

Customize My Sidebar	+	Tasks & Appointments	Show <input type="checkbox"/>
Sidebar Load Exclusions	+	Notes	Show <input type="checkbox"/>
Extra Fields Panel	+	Filebox	Show <input type="checkbox"/>
Date Format	+	Campaigns	Show <input type="checkbox"/>
Help	+	Tags	Show <input type="checkbox"/>
	+	Custom Fields	Show <input type="checkbox"/>
	+	Opportunities	Show <input type="checkbox"/>

[CLOSE](#)

Sidebar Load Exclusions Tab

Infusionsoft. Sidebar

Sidebar Load Exclusions

Emails from this list won't be loaded into Sidebar.

No exclusions.

Add exclusion:

[ADD](#)

If you would like to exclude an entire domain of email addresses (i.e. all emails @yourcompany.com) you can input all@yourcompany.com

[CLOSE](#)

Extra Fields Panel Tab

Infusionsoft
Sidebar

Customize My Sidebar

Sidebar Load Exclusions

Extra Fields Panel

Date Format

Help

Extra Fields Panel

Here you can add any fields from your Infusionsoft to your sidebar Extra Fields panel, including custom fields! You can also reorder them however you desire.

To reset fields order and display them in alphabetic order, [click here](#).

- Test User Field
- Test User List Box Field
- Test Website Field
- Test Whole Number Field
- Test Year Field
- Test Yes-No Field
- Test Currency Field

CLOSE

Date Format Tab

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Sidebar

Customize My Sidebar

Sidebar Load Exclusions

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Date Format

Help

Date Format

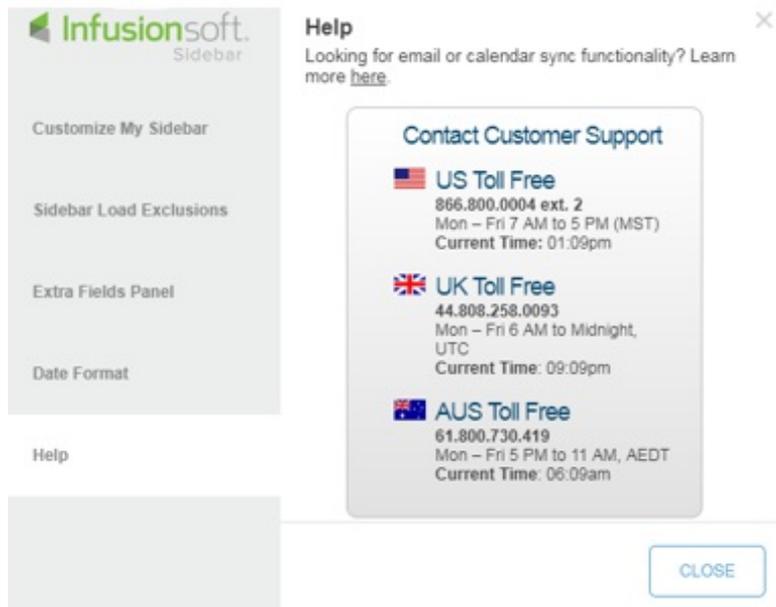
Use the following to specify the date format used by your Infusionsoft application. The date format was selected when you set up your Infusionsoft application. The setting might be different than the date format on your local computer.

Date format used by your Infusionsoft application

dd/mm/yyyy ▼

CLOSE

Help Tab



Sidebar Functions

Refresh Sidebar

1. Click the refresh icon at the bottom of the sidebar

Pause Sidebar

1. Click the grey pause icon at the bottom of the sidebar, to pause functionality (The pause button will turn red when Infusionsoft Sidebar is paused)

Resume Sidebar

1. Click the red pause icon at the bottom of the sidebar, to resume functionality (The pause button will turn grey when the Infusionsoft Sidebar is active.)

Collapse Sidebar

1. Click the '>>' icon at the bottom of the sidebar, to collapse the sidebar

Expand Sidebar

1. Click the '<<' icon at the bottom of the sidebar to expand the sidebar

Exit Sidebar

1. Click the settings icon at the bottom of the sidebar
2. click 'Exit Sidebar'

Sign Out

1. Click the settings icon at the bottom of the sidebar
2. Click 'Sign Out'

Other Helpful Tips

- If the sidebar does not automatically appear, after logging into your email, refresh your browser window and the sidebar should appear
 - If you hover over tasks/appointments/notes/opportunities, a tool tip with some additional info, such as the start and end date for appointments, the task date for tasks, the creation date of notes, and next action dates for opportunities, will appear.
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