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

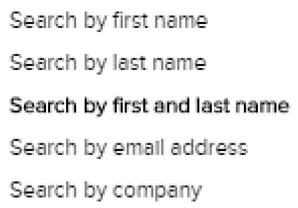
Load a contact into the sidebar

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

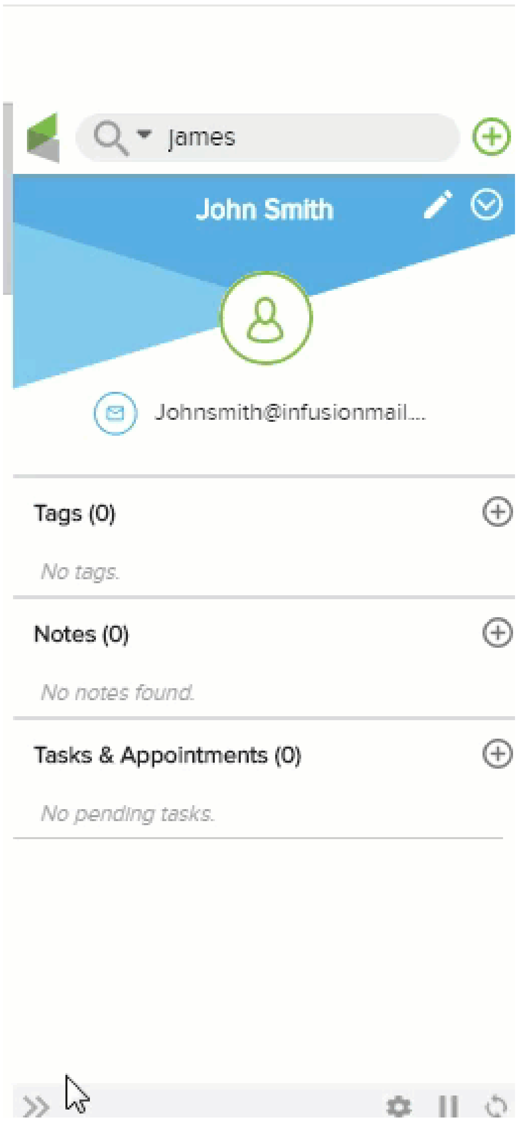
2. Click the dropdown arrow to choose a search option (the search option in bold indicates which search option is currently selected)



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

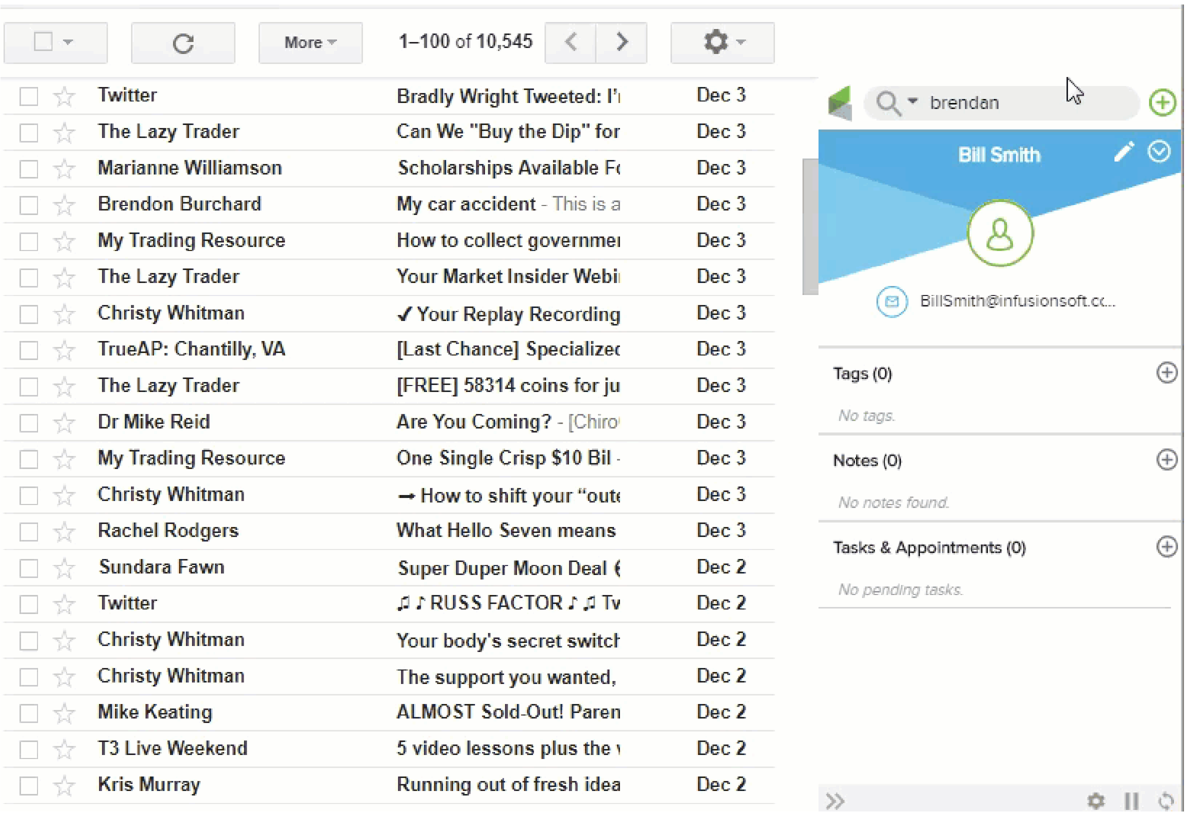


1. click the '+' icon at the top of the sidebar to add a new contact

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 hoving over an email in the inbox

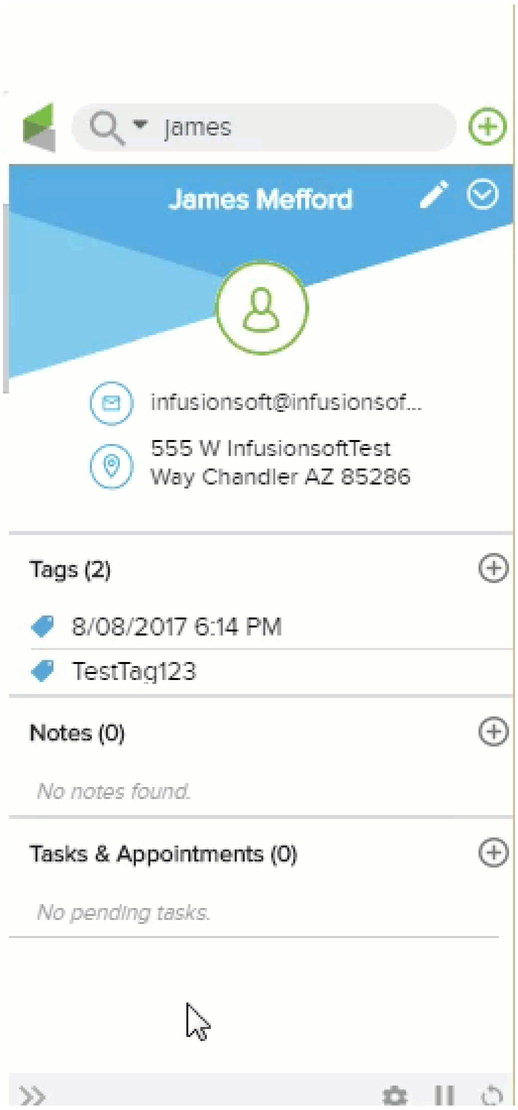


1. Hover over an email in the inbox. If the contact **already** exists as an Infusionsoft contact, their contact card will automatically load in the sidebar.

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.

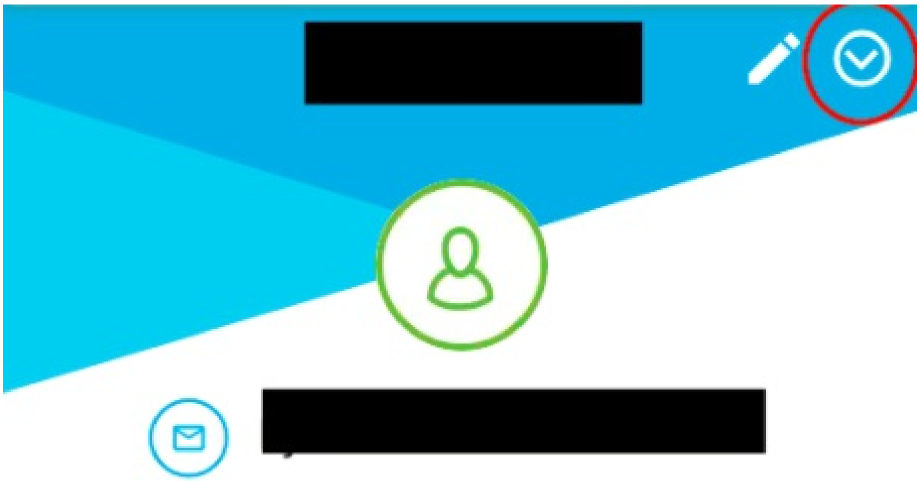
Edit a contact



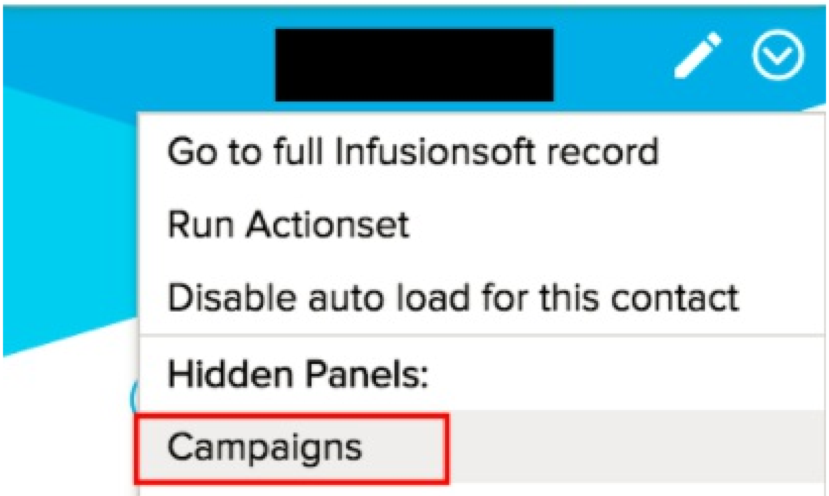
1. Load a contact card into the sidebar
2. Click the 'Edit' icon (pencil) at the top right of the sidebar
3. Make any needed changes to the 'Edit Contact' form
4. Press the 'Update Contact' button at the bottom of the form, in the sidebar.

View Campaign History and Status

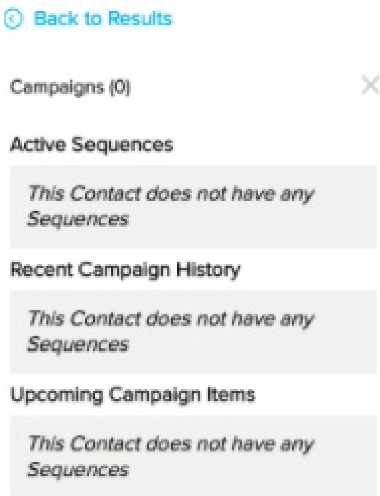
1. When a contact is displayed in the sidebar, Click the drop down arrow, located in the top right corner of the sidebar



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



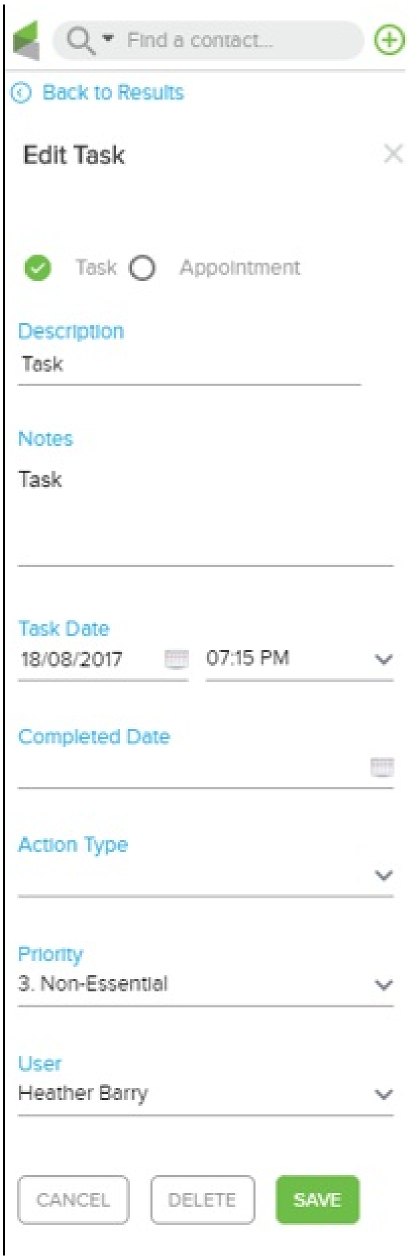
3. View your contact's campaign history



Tasks

Add a task

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



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

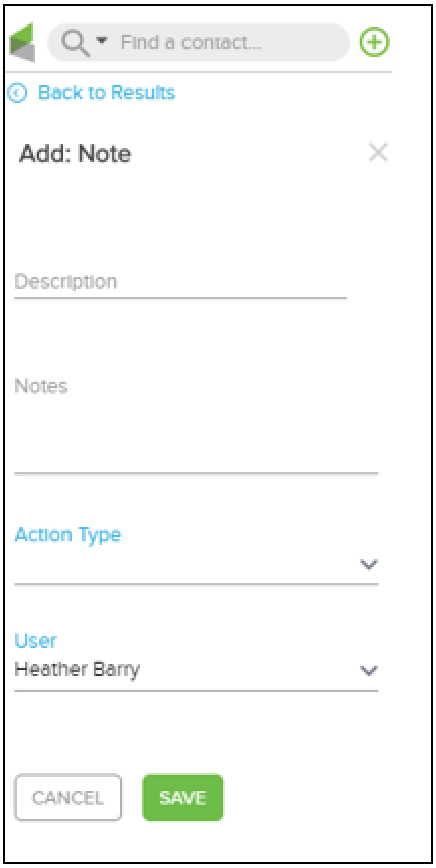
1. Click on the appointment
2. Click the 'Delete' button

Notes

Add a note

1. Click the '+' icon next to Notes

2. Add note information



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

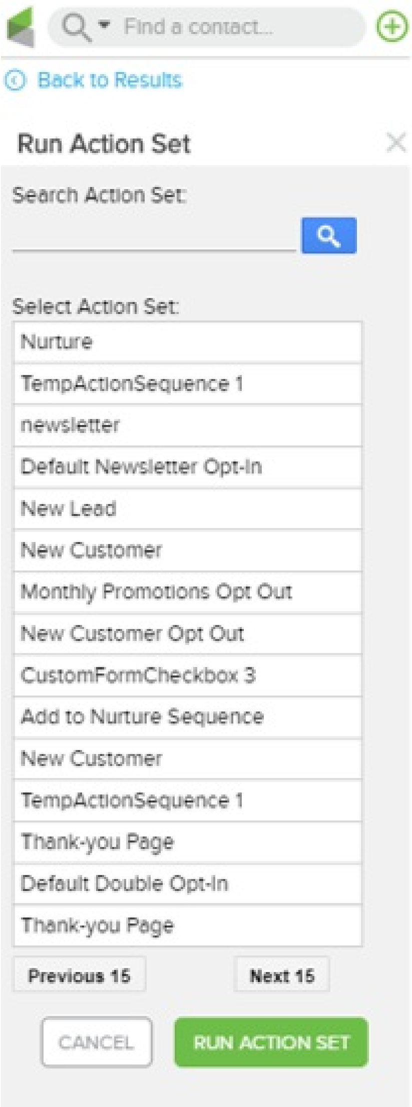
Additional Settings and Features

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

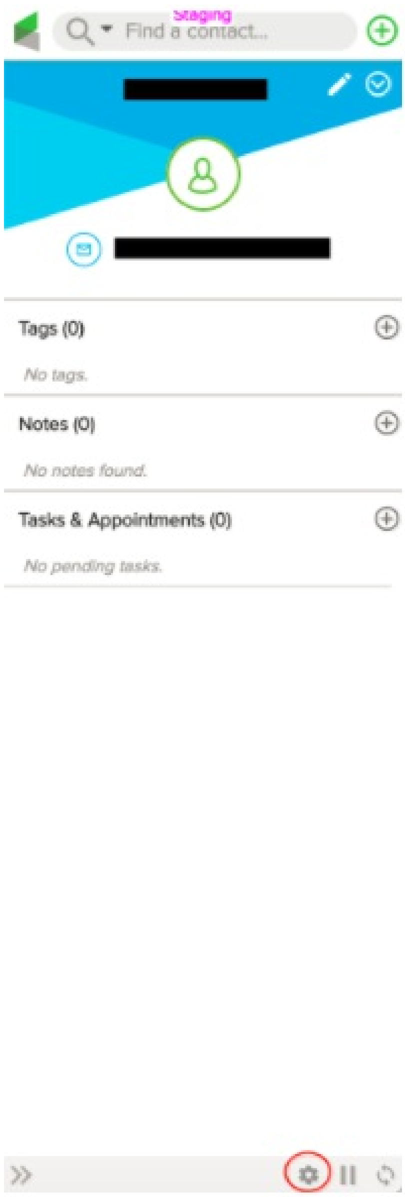
1. Click the menu icon at the top of the sidebar
2. Click 'Disable auto load for this contact'

Enable auto load for this contact

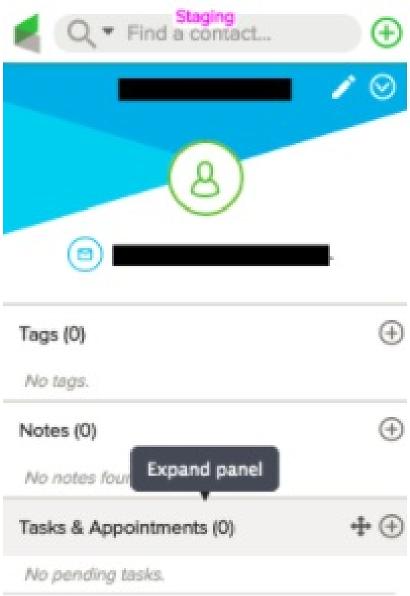
1. Click the menu icon at the top of the sidebar
2. Click 'Enable auto load for this contact'

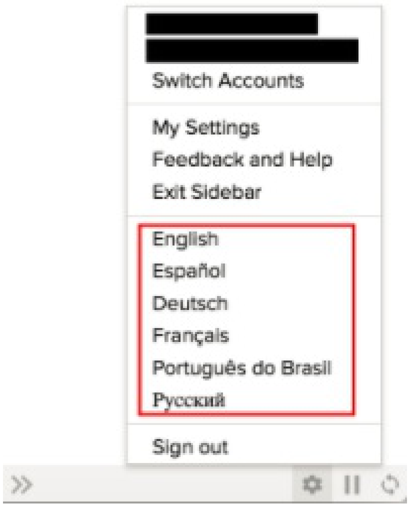
Change the sidebar language

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)



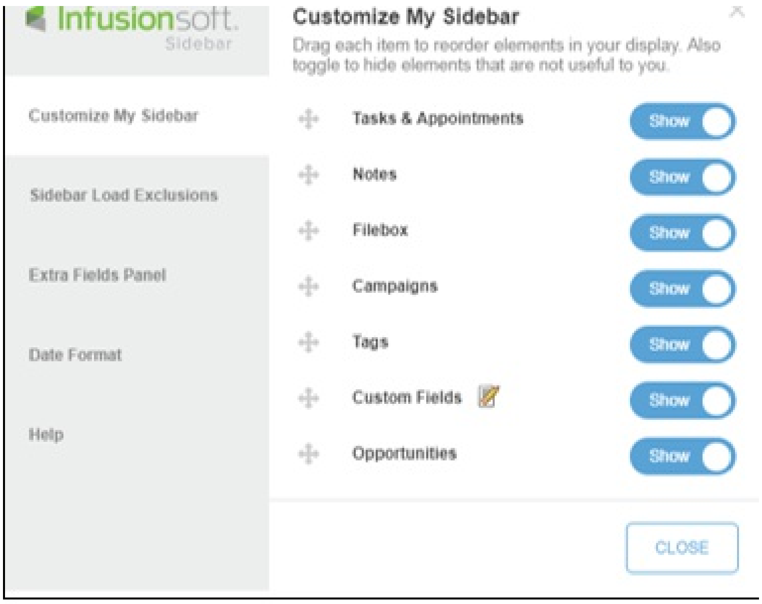


Sidebar Settings

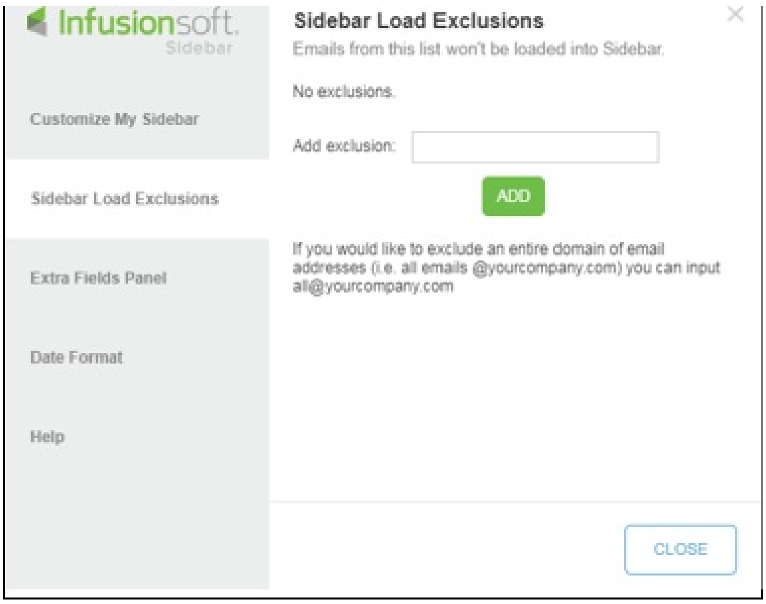
1. Click the settings icon at the bottom of the sidebar

2. click on 'My Settings.

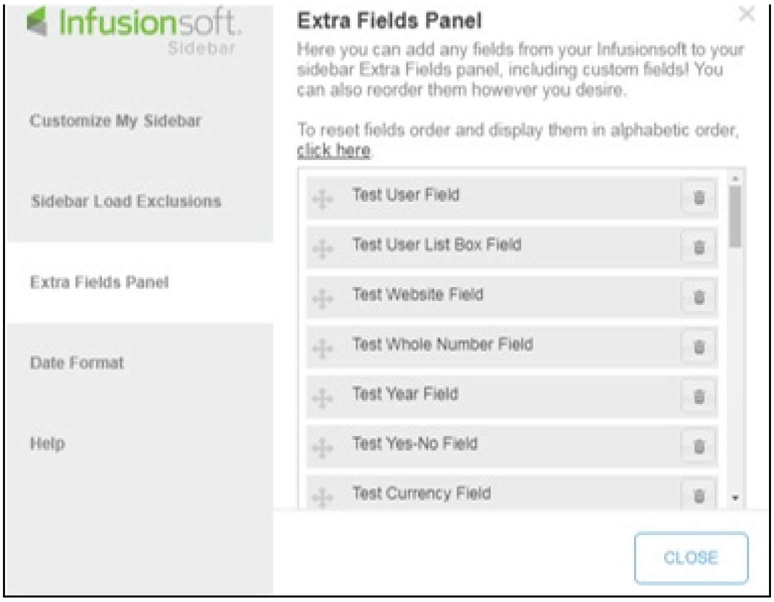
Customize My Sidebar Tab



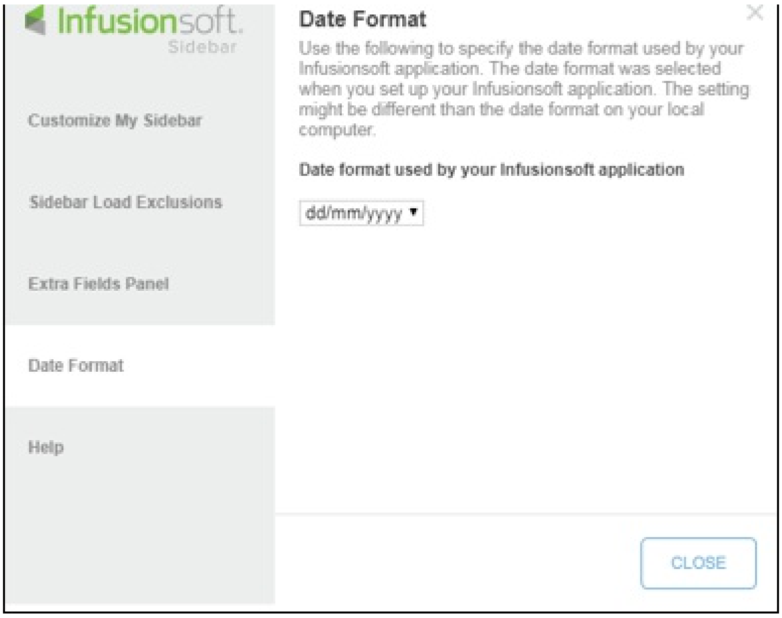
Sidebar Load Exclusions Tab



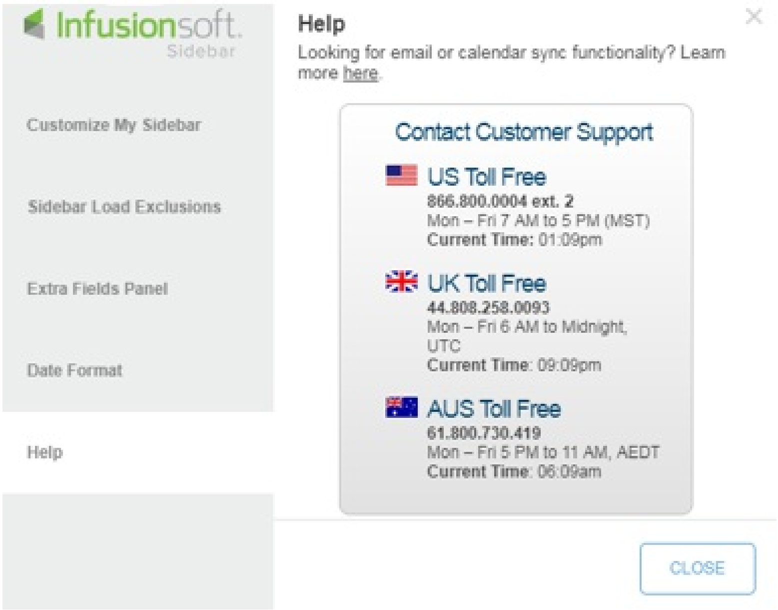
Extra Fields Panel Tab



Date Format Tab



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.