Enable Email Gmail Sync»

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

1. Log into Gmail Sync Sidebar



2. Go to the Gmail Sync gear icon and click "My Settings".



3. Click Enable Email Sync.



4. Type in the **Gmail** email address and **Gmail** password and click Save Gmail Settings then click "**Save Gmail Settings**"

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|---------------------------|---|--|-------|
| Infusionsoft. | My Email Sync Settings | | Í |
| I Sync | General | Sync Exclusions | ie f |
| A Customize My Sidebar | This will sync all of your e | emails in the future. <u>How it works?</u> | -li P |
| My Email Sync Settings | Please make sure you have IMAP Enabled on your Gmail/Google Apps Account before trying to validate your account. How to do enable IMAP in Gmail | | I |
| Calendar Sync Settings | Gmail Address | rose.istest8.syt@gmail.cor | |
| Extra Fields Panel | Password | | l |
| Date Format | Save Gmail Setting | IS Cancel | |
| Help & Feedback | | | |

- 5. You are set up. Emails can take up to 2 hours to sync but usually only take 30 minutes.
 - This will only sync emails going forward not ones from the past.
 - There isn't a way to manually sync an email using Gmail sync
 - This will sync emails to and from contacts inside of Infusionsoft only. If the contact isn't in the system then it won't sync the email.
- 6. Please see the "Error: Invalid Gmail Login or password" section if you receive the error after attempted login.

Error: Invalid Gmail Login or Password

1. Click the "Gear > Settings"

| | 0 |
|--------------------------|---------------------------------------|
| Q | |
| ions + | Try the new Gmail Display density: |
| | Comfortable Cozy Compact |
| tabs will be shown here. | Configure inbox Settings 2 ThOs |
| ies | Get add-ons Send feedback |

2. Go the "Labs" tab and make sure that all Labs are disabled. If you end up disabling any "Labs" scroll down to "Save Changes"

| Note: lf Inbox a | f you clicked "Saved changes" for the "Labs" you be returned to the and will need click "Gear > Settings" again |
|---|---|
| Gmail - compose Inbox Starred Sent Mail | Settings General Labels Inbox Accounts and Import Filters and Blocked Addresses Forwarding and POPIIMAP Add-ons Chat Labs Offline Themes Gmail Labs: Some crazy experimental stuff. |
| Drafts Infusionsoft More • Rose • + | escape hatch. Use https://mail.google.com/mail/u/3/?lab=0. Search for a lab: Save Changes Cancel Available Labs Available Labs |
| | After archiving, deleting, Auto-dvance Enable © Go to the next (newer) © Bruce D © Disable © Go back to the threadili Show the next conversation instead of your inbox after you delete, archive or mule a conversation You can selct whether the odymen to the next or previous conversation in the "General" Settings page. Set of the set of |

Pro Tip! All enabled labs will be at the top

3. Click "Forwarding and POP/IMAP" tab and click "Enable IMAP"

| Settings | |
|--|---|
| General Labels Inbox Account | s and Import Filters and Blocked Add 1 Forwarding and POP/IMAP Add-ons Chat Labs |
| Forwarding: Learn more | Add a forwarding address |
| | Tip: You can also forward only some of your mail by creating a filter! |
| POP Download: Learn more | 1. Status: POP is disabled Enable POP for all mail Enable POP for mail that arrives from now on |
| | 2. When messages are accessed with POP keep Gmail's copy in the Inbox |
| | 3. Configure your email client (e.g. Outlook, Eudora, Netscape Mail) Configuration instructions |
| IMAP Access: (access Gmail from other clients using IMAP) Learn more | Status: IMAP is disabled 2 Enable IMAP Disable IMAP |
| | Configure your email client (e.g. Outlook, Thunderbird, iPhone) |

4. Click "Save Changes"



5. Click the image in the top right and click "Google Account"



6. Click on "Sign-in & security"



7. Make sure that 2-Step Verification is turned off.

| Signing in to Google | | | |
|---|---|--|---|
| Control your password and account access, along with backup options if you get locked out of your account. | Tired of typing passwords? T Get started > | Fry using your phone to sign in. | 2 |
| Make sure you choose a strong password | | | |
| A strong password contains a mix of numbers, letters, and symbols. It is hard to guess, does not resemble a real word, and is only used for this account. | Password & sign-in meth Your password protects you protection with 2-Step Verifi- phone for you to enter when your password, it is not enou | od raccount. You can also add a second layer of cation, which sends a single-use code to your you sign in. So even if somebody manages to steal gh to get into your account. | |
| Make sure 2-step Verification is off | Note: To change these settin | ngs, you will need to confirm your password. | |
| | Password | Last changed: March 21, 2016 | > |
| | 2-Step Verification | Off | > |
| - | | | |

8. For a Google Business Domain. Log into your Admin Console.







| | By de this s Scroll down |
|-----------------------|--|
| Two-step verification | 2-Step Verification adds an extra layer of security to your G Suite accounts. Users are required to enter a verification code sent by Google (in addition to their username and password) when they sign in. |
| | Allow users to turn on 2-step verification |
| | Go to advanced settings to enforce 2-step verification » |
| Less secure apps | Some apps use less secure sign-in technology, which makes accounts more vulnerable. You can choose to deny access for these apps, which we recommend, or choose to allow access despite the risks. |
| | Go to settings for less secure apps » |

Note: In order for them to turn off 2 step verification they will need to log into their admin console. Here is a google help article about that.

9. How to turn it off 2-Step Verification



10.

- Click the 2-Step Verification
- You will be asked to sign into your account again
- Enter the verification code
- Click Turn Off





11. Find where it says "Recently used devices"

Click on "Review Devices"

| ← Recently use | ed devices | |
|--|---|--|
| Someone | been active on your account in the last 28 days, or are currently signed in. Learn more has your password. Google prevented the sign-in. Learn more Unknown device Time: 44 minutes ago | |
| | Location: United states IP address: 2001:4800:7821:101:be76:4ef f.fe05:752c Approximate location (may include nearby towns) Do you recognize this activity? If not, someone else might have your password. | |
| VES, THAT WAS ME NO, SECURE ACCOUNT Click "Yes, that was me" Windows | | |

12. Turn on "allow less secure apps"

| Apps with account acce | SS |
|--|--|
| Keep track of which apps or services you gave permission to access your account, and remove the ones you no longer use or trust. | Apps with access to your account Make sure you still use these apps and trust them with your information. Google Chrome MANAGE APPS |
| | Saved passwords You have no synced passwords. |
| | Allow less secure apps: ON Some apps and devices use less secure sign-in technology, which could leave your account vulnerable. You can turn off access for these apps (which we recommend) or choose to use them despite the risks. |

13. Sign into Gmail

14. Go to https://accounts.google.com/b/0/displayunlockcaptcha and click OK.



15. You can now go back to the Infusionsoft Sidebar to Sync your email.

Reminder: The emails will only sync going forward if there is a contact record inside of Infusionsoft with the same email address. This sync can take between 30 minutes - 2 hours. To run a test put the Date and time that you are sending the email then wait and come back to it later. This way if it doesn't sync you can see when the email was sent and we can try to figure out why.