

# Email Sync

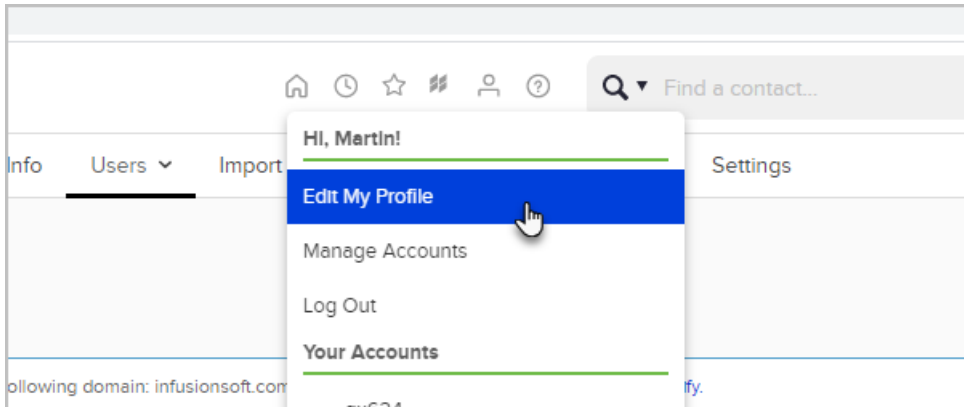
This article applies to:

Our new **Email Sync** connects Keap with your existing Microsoft<sup>1</sup> or Gmail email account. Incoming and outgoing emails exchanged with your IS contacts automatically sync to your client records, so you can quickly search and view your interactions alongside other key customer information.

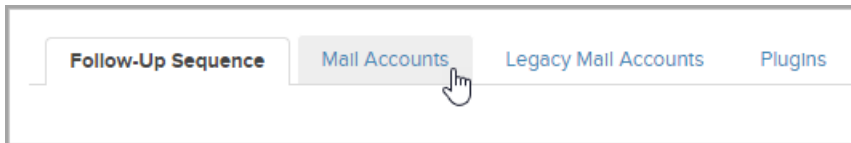
<sup>1</sup>Exchange Online, Office 365, Hotmail.com, Live.com, MSN.com, Outlook.com, and Passport.com accounts are also supported.

## Set up Email Sync

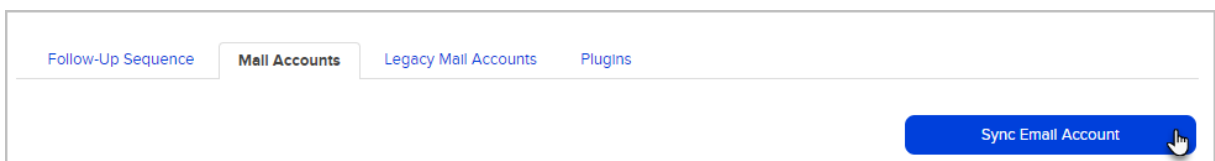
1. From the icon menu, hover over the person icon and click **Edit My Profile**



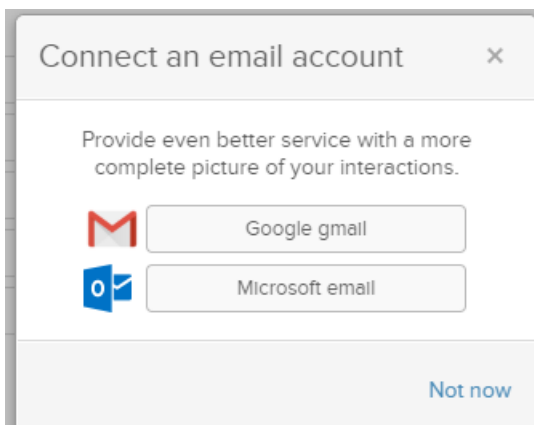
2. Scroll down to the bottom and click the **Mail Accounts** tab



3. Click **Sync Email Account**



4. Select the email provider you want to sync



## 5. Complete the Google or Microsoft authentication

**Warning:** If you are syncing Microsoft email, your email must be hosted by Microsoft. It is possible to use an email not hosted by Microsoft in applications such as Microsoft Outlook, so double-check where your email is hosted if you encounter errors with a Microsoft email.

## FAQ

### What permissions are needed from Outlook, Microsoft to allow the Email Sync?

In order for Keap to be allowed to connect to Outlook, Microsoft requires the user to grant Keap the following capabilities:

- Have full access to your calendars
- Maintain access to data you have given it access to
- View your basic profile

### How often do email inboxes sync?

Email inboxes do not sync at set intervals. The system checks for opportunity to sync every 5 to 10 minutes. The sync occurs shortly after an account sends or receives an email related to a contact in the Keap app. If there is nothing to sync it indicates "last synced x days ago" which is the last time it found an email to sync. The **Pending** status means no emails have been synced yet. Once you send or receive an email from one of your contacts it will update to an **Active** status.

### Which email accounts do not work?

All Microsoft accounts **except for Exchange servers** will work with Email Sync.

### Can I remove emails after I have synced an inbox?

To remove all emails from a synced inbox, navigate to Settings > Mail Accounts and disconnect the email address. Then select the checkbox to erase the email history.

### Are attachments synced to my Keap account?

No, email attachments are not included in the email sync. Only the email content is synced.

### Where can I see synced emails in my Keap app?

Emails display in a client's Contact Record email tab and the Recent Email History section on the main page of the Contact record.

### Can I sync multiple emails to my Keap account?

Yes, you can sync multiple email accounts to one Keap account, even if they are from the same email provider. Please note that adding an excessive number of email accounts can result in performance issues in the app.

### Does Email Sync also sync information from my calendar?

No, Email Sync for Microsoft and Gmail does not sync calendar appointments.

**Is my entire email history synced when I set up email sync?**

No, only emails received after syncing are imported. Past emails do not sync.

**I don't want my email to continue to sync. Can I stop the email sync?**

Yes, you can disconnect an email inbox to stop the email sync. Navigate to Settings > Mail Accounts and disconnect the email address.

**Will emails sent from Keap sync to my external email account?**

No, emails sent from Keap are not synced to your external email account. Email sync only affects emails sent or received by a Microsoft or Gmail account that is linked to Keap.

**Which emails will sync from my Microsoft/Microsoft/Gmail email account?**

Only emails that are sent to or from a contact in your Keap account will sync. We automatically do **not** sync any emails from contacts who share an email address with any user in your application.

**Which email fields does this tool sync with?**

The contact's primary email field only. Other email fields or custom fields will not be synced.

**Will a new contact be created for emails from addresses not listed in Keap?**

No, emails from addresses that do not belong to a contact in your app will not sync.

**Can all users see a contact's email history, regardless of which user added it to the account?**

Yes, all users are able to see a contact's email history, regardless of which user added it to the account.

**In the contact record, it says my emails last synced 5 minutes ago. I see all the emails from my Gmail accounts, but not one I just sent from my Microsoft account.**

The last synced status refers to the most recent inbox that was synced. In order to see exactly when each inbox was last synced, navigate to Settings > Mail Accounts.

## Troubleshooting

**I received an error message, what should I do?**

Error	Description	Recommendation
"Access denied for this account."	Permissions for a specific email address are disabled by the user or provider; e.g., a user changed the email password, or app permissions were disabled, or an incorrect authentication token was provided.	If your password was recently changed, disconnect and reconnect your email account with the new password. When connecting the email, enable permissions at the provider (email account).
	Email sync permissions for an email address have	

"Authorization has been revoked for this account"	been revoked by Keap. This is either a manual revocation or Keap has been notified of removed permissions on the provider side and has actualized accordingly.	Enable permissions on the provider side or call Keap Support.
"Email is not enabled for this account".	The email address does not exist or is not supported for this provider.	Make sure email is correctly associated with either Google or Microsoft. Make sure the email is spelled and entered accurately.
"This app has become unavailable"	A Keap account no longer exists or has been closed.	Call Keap Support.
"Access denied for this app"	Permissions for sending email sync updates to Keap has been revoked.	Call Keap Support.
"Unknown error reading email from provider, please check again later"	Unknown error not covered by any other error message.	Try again. If the problem persists, call Keap Support.
"Unknown error reading email from provider, please check again later"	Unknown error not covered by any other error message.	Try again. If the problem persists, call Keap Support.
"Unknown error importing email, please try again later"	Unknown error not covered by any other error message.	Try again. If the problem persists, call Keap Support.