Microsoft email sync

This article applies to:

Which email products are supported?
- Exchange Online
- Office 365
- Hotmail.com
- Live.com
- MSN.com
- Outlook.com
- Passport.com

Pro-Tip! If you are syncing a 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.

How it works

Every correspondence you send from or receive to your Microsoft email account will appear on the Email tab of the contact record.

Note: Keap will not sync any emails from contacts who share an email address with a user in your application.

One way sync

Emails you send from Keap won't sync back to your Microsoft email account, but are recorded in the activity feed and email page contact record.

Identify synced emails

Easily identify emails that were sent by you through your Gmail account or emails you received from your contact by the Sent by information where the synced email address will be shown.
Attachments

Attachments sent from Microsoft will be shown but not opened.

Contact's main email

The contact record consists of one main Email address field and two additional Email address fields, which are located under Additional info. Emails sent to and/or received from the additional email addresses will not be included in the Email history. Only emails sent to or received from the contact’s main email address will sync in Keap.
Email history

The email history starts from the moment you enable the sync. Any emails sent before the sync will not be shown in the email history.

Setup Email Sync

1. Navigate to Settings, located in the top right drop down

2. Click Integrations

3. Click Connect on the Microsoft Email card

4. Sign in to Microsoft online and select the account you want to link

Determine if your Outlook account is hosted by Microsoft Exchange

1. Open Outlook and click the File tab.

2. Click Account Settings and select Account Settings...
3. In the pop-up box E-mail tab, the account names and types are listed for each account.

FAQ

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 status “Pending” means no emails have been synced yet. Once you send or receive an email from one of your contacts it will update to “Active”.

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.

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 > Integrations 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 page and the activity history section 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 > Integrations 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.

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 > Integrations.