

Outlook Integration

[Outlook Integration \[Video\]](#)

****Before you begin, clear your junk/spam folder(s) and the deleted items folder in your Outlook to ensure an efficient syncing process. ****

Head to your [User Preferences](#) and find the “Email and Calendar Integration” section. Click the Microsoft Outlook button to begin connecting your Microsoft Office 365 email account.

EMAIL & CALENDAR INTEGRATION

Connect your email and calendar to send and receive emails from within AMPED. Connecting your email allows you to track conversations and activities. Enter your credentials to get started.

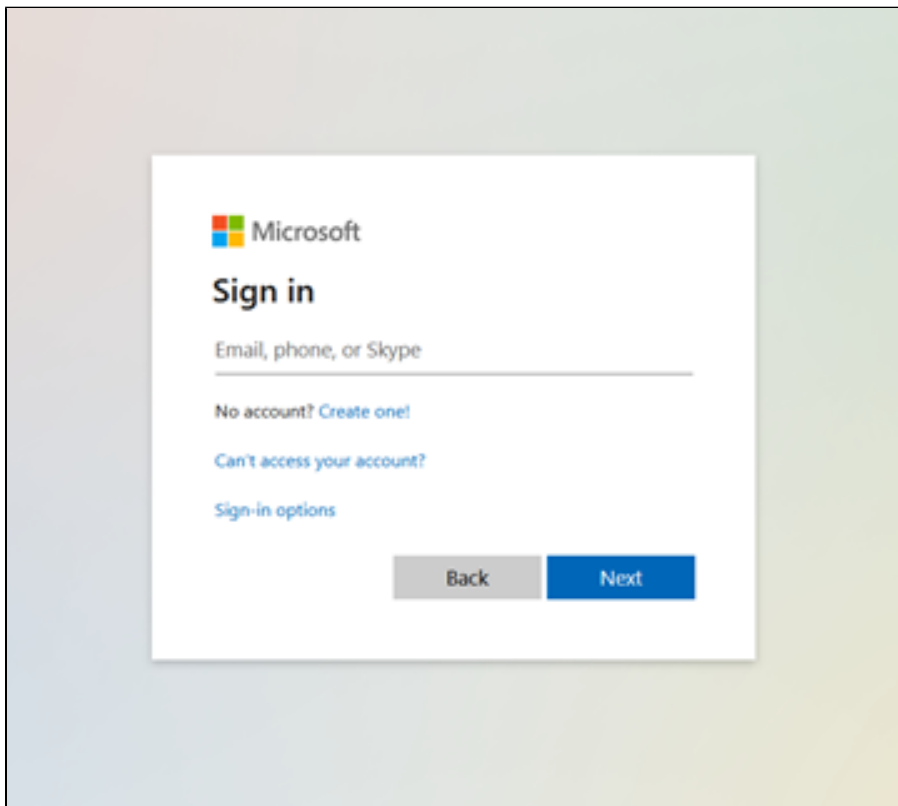


Gmail



Microsoft Outlook

Enter in the email address and password you wish to connect.



Select the calendar and sync preferences, as well as any Outlook folders you want AMPED to sync, and click "Save and Sync." Users must implement at least one folder from the email sync and are recommended to sync "Inbox" at a minimum.

Please select which folders you would like to sync into AMPED

CALENDAR SYNC

Select the checkbox below to sync your main calendar to AMPED.

☐ Calendar

Choose from the following sync preferences

☒ Sync Calendar to AMPED

☐ Sync AMPED to Calendar

☐ Sync bi-directionally

EMAIL SYNC

Select from the following folders to sync to AMPED.

Recommended to sync 'Inbox' at a minimum.

☐ Select All

☒ Inbox

☐ Category Forums

☐ Category Personal

☐ Category Promotions

☐ Category Social

☐ Category Updates

☐ Important

☐ Sent

☐ Starred

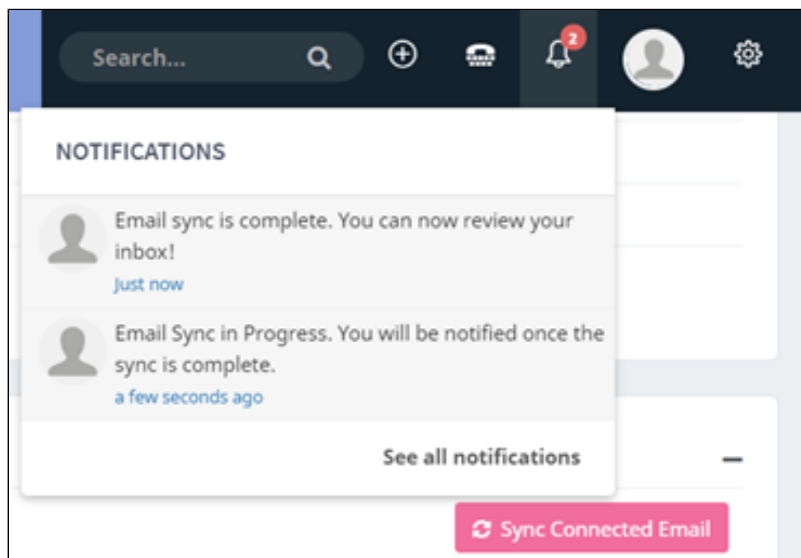
Save & Sync
Cancel and Disconnect

For the email sync, "Inbox" is the only mailbox selected by default. If you would like to include additional folders in your account, please select them from the list.

For the calendar sync, users can select one way-syncs to sync Outlook to AMPED or AMPED to Outlook, or a bi-directional sync with activities syncing every 60 seconds between AMPED and Outlook. The one-way integrations sync one way. This selection is good for users who want one source of truth. The bi-directional sync integrates two ways, making sure that the AMPED and Outlook calendars are the same.

Click 'Save & Sync' once you have selected your preferences; AMPED will begin syncing your email and calendar in the background. You may continue to use the application during the sync, and you will receive a notification when the sync is completed.

**Note this can be changed at any point after initial sync. To do so, go back to your Email and Calendar Integration in User Preferences and click on "Update inbox selection."*



Sync Frequency and Automatic Exclusions

The initial integration will sync up to your most recent 5,000 emails and all calendar activities from the start of the month. Thereafter, emails and calendar activities will be synced every sixty seconds. AMPED best practices recommend setting up the bi-directional sync and AMPED to Outlook sync at the start of the month to avoid syncing past activities. AMPED will not integrate [SMS records](#), [call records](#), or privately marked calendar activities. Furthermore, the date range of sync from activities will be excluded from the Outlook to AMPED sync.

Manually Excluding Activities from Sync

To avoid unwanted activities, mark an activity private on Outlook to exclude it from syncing to AMPED.

Record Association

One direction Syncs

Outlook to AMPED integration syncs scheduled meetings and tasks scheduled in Outlook to the AMPED calendar module. When you send or receive an email or a calendar invitation through Outlook, the events, associated leads, and contacts will automatically sync into AMPED. Activity provided that the email address included on the Outlook invite is associated with a lead or contact that is also assigned to the syncing user. Any attachments contained in the original Outlook invite will also be synced to the AMPED activity.

AMPED to Outlook integration syncs scheduled meetings, calls, and task activities back to Outlook. When you schedule an AMPED meeting, call, or task and associate a lead or contact, the creation of the activity in Outlook upon sync will send invites to the email addresses contained on the original Lead or Contact record. Any attachments contained in the original AMPED invite will also be synced to the Outlook activity.

To ensure activities are properly attributed to opportunities, users should revisit the activity and make the association the appropriate opportunity.

Bi-Directional Sync

The bi-directional sync integrates two ways, ensuring that AMPED and Outlook calendars are the same

The bi-directional integration syncs scheduled meetings and tasks scheduled in Outlook or AMPED to both the Outlook calendar and the AMPED calendar module. When you send or receive a calendar invitation through Outlook, the events, associated leads, and contacts will automatically sync into AMPED. While, when you send and receive a calendar invitation through AMPED, the creation of the activity will send invites to the email addresses contained on the original Lead or Contact record. The Bi-directional sync will update the title, location, event date, and event details.

By using the bi-directional sync, you can delete AMPED calendar activities directly from your Outlook calendar. AMPED does not support the deletion of activities from Outlook. If you would like to remove it from AMPED, please delete it from your Outlook Calendar.

Email Sync

This two-way email sync allows you to send and receive emails and maintain email threads and messages with your leads and contacts all within AMPED. Whether you email through AMPED or through Outlook, your conversation is synced in both places and allows you to view your entire conversation.

Go to the Email Records section of your [Messages module](#) to see your connected inbox.

Messages

EMAIL RECORDS

CALL RECORDS

SMS RECORDS

All

Matched

Unmatched

Showing 1 - 100 of 260

Page 1

<<

<

1

2

3

>

>>

☐ Date

To/From

Subject

Views

Associate With - Owner

Actions

Go to the [Calendar module](#) section to see the synced calendar meetings and activities.

Calendar

Select Action

search

Go to Advanced Search

All

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Page 1

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1

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4

>

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Add New

Duration

Title

Phone

Owner

With

Actions

Mon 01-24 10:06 AM - 10:11 AM

call

-

Lou Byck

Mon 01-24 10:06 AM - 10:06 AM

CALL-OUT @ 10:06:13 AM

(609) 656-4900

Lou Byck

*Virtual meeting links will be included in the body of the calendar activity.