CITK

How to Set Up Two Way Email Sync for Gmail

Two-way sync for Gmail allows users to integrate their Gmail account with the CRM and enables the synchronization of emails between the two platforms. This integration creates a connection between the platforms and syncs both ways.

- Sync inbound and outbound emails from existing contacts to GHL
- Create contacts and add conversations seamlessly from Gmail
- Real-time bidirectional email synchronization for improved efficiency.

Covered in this Article

How is the secure connection handled if Gmail login credentials change? What happens when an email is forwarded from Gmail?

What is Gmail Two way sync?

Gmail Two-Way Sync is a feature that enables the bidirectional synchronization of emails between Gmail and CRM. It allows users to integrate their Gmail account with the CRM, establishing a connection that keeps emails in sync across both systems. Any emails sent, received, or updated in Gmail will be automatically reflected in the CRM, and vice versa. The two-way sync ensures that users have a unified and up-to-date view of their emails, regardless of their platform. This feature streamlines email campaigns improves productivity, and ensures that important email communications are accessible in both Gmail and the CRM.

Steps to connect

In the sub-account, go to "Settings" > "My Profile" and then the General tab. Scroll down to the section **Email (2-way sync)**

Please Note:

> You will only see the Profile tab if you are added to the sub account for which you are viewing at that time. You can also use the **Login As Feat**

Over there, please select Gmail two sync and hit **Connect.**
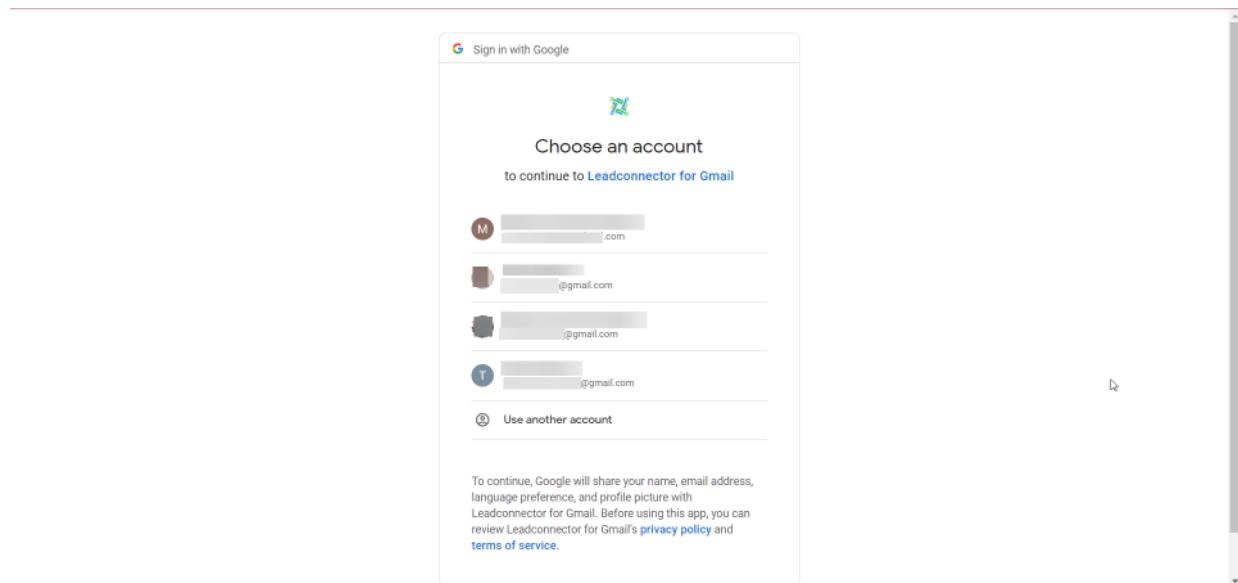
It will then prompt you to choose one of the available Gmail Accounts in that browser or ask you to connect a Gmail account; select the one you need; connecting a new account will require you to enter that account's credentials in the popup.

Connecting it will then ask you about which permissions you are allowing LeadConnector to have on your Gmail account; make sure to allow all and then hit enable continue:

Leadconnector for Gmail wants access to your Google Account

[ ] @gmail.com

Select what **Leadconnector for Gmail** can access

Associate you with your personal info on Google ☑

See your primary Google Account email address ☑

View your email messages and settings. **Learn more** ☐

Send email on your behalf. **Learn more** ☐

Make sure you trust Leadconnector for Gmail

You may be sharing sensitive info with this site or app. You can always see or remove access in your **Google Account**.

Learn how Google helps you **share data safely**.

See Leadconnector for Gmail's **Privacy Policy** and **Terms of Service**.

Cancel   Continue
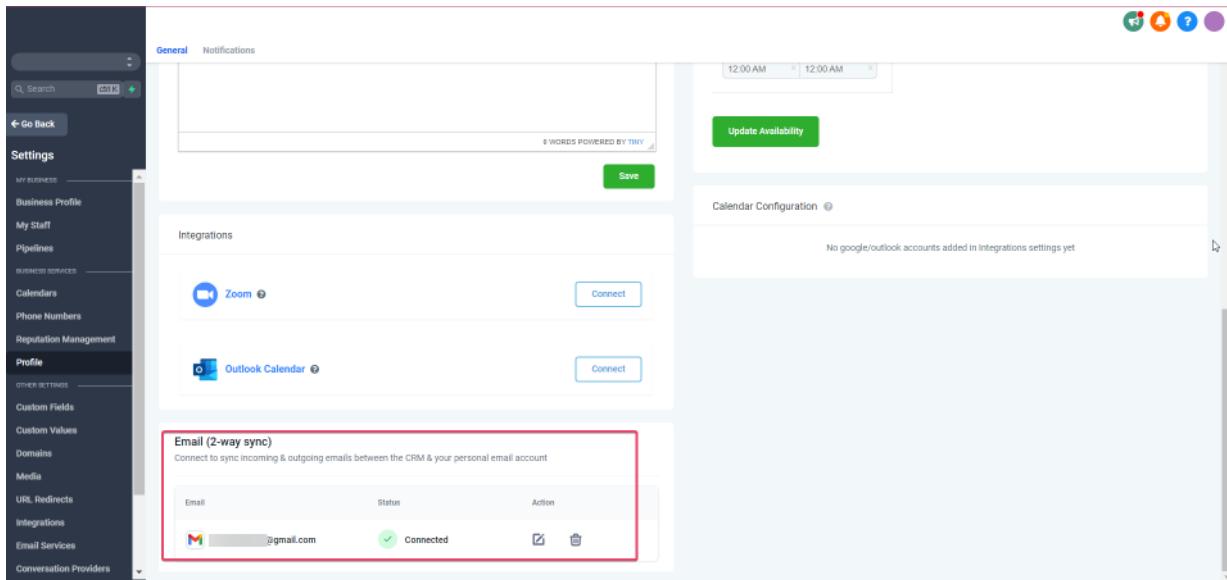
Once you hit, **Continue,** you will see your desired Gmail account connected in the Email Two Way sync tab:

How does the 2-way sync work between the CRM and your email account?

There are two cases of how the sync can be established.

1. You can email a contact from the CRM to initiate the sync between both platforms.
2. Gmail Sync also works if a contact that is already saved in the CRM sends an email to the User (who has Gmail Two Way sync integrated) on their Gmail Email address. The email would sync into the conversations tab. **The contact also needs to be assigned to the user beforehand.**

Please note

If the user is added to multiple sub accounts, and has integrated the same Gmail account for Gmail Two way sync in all those accounts, the ema
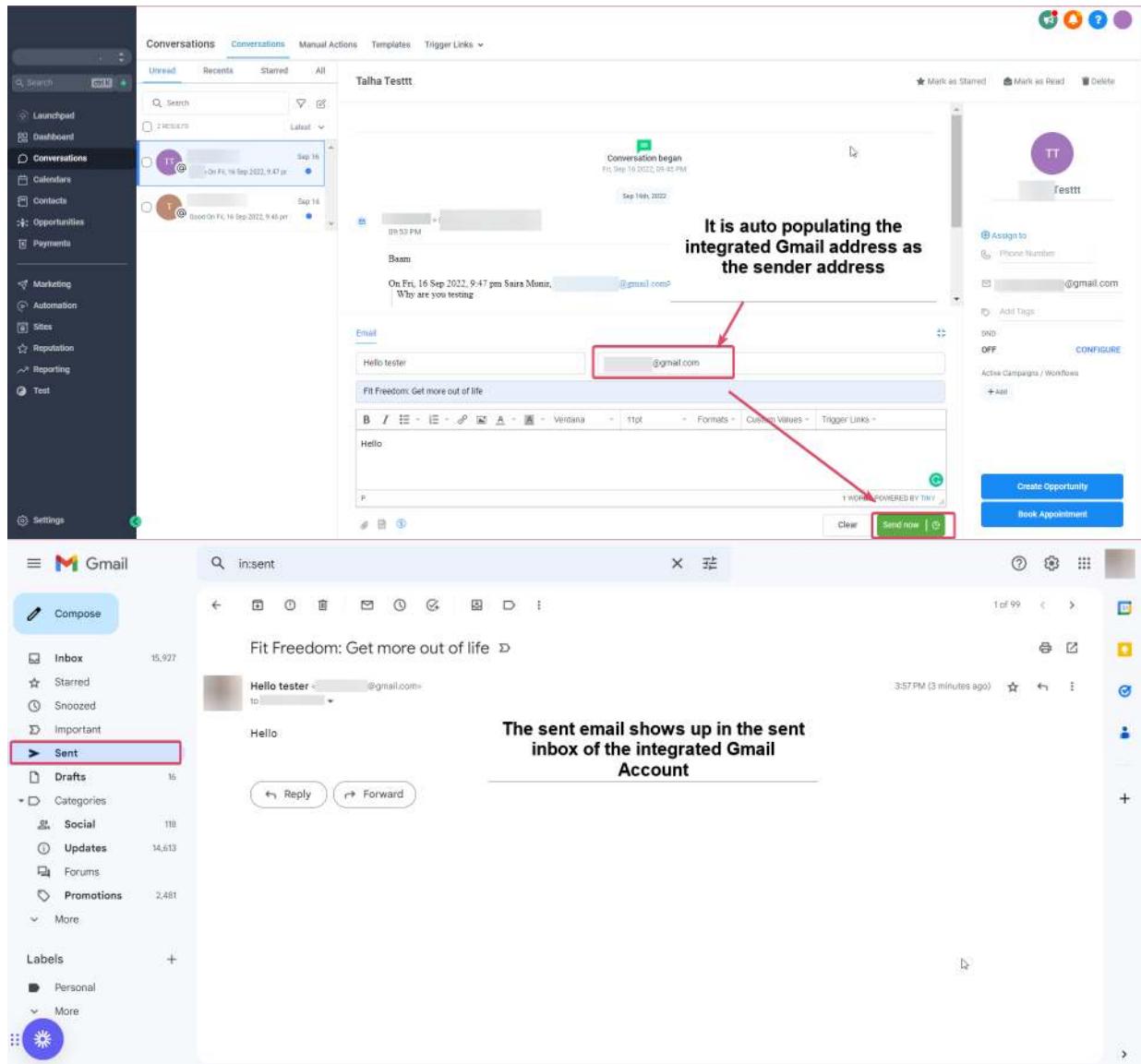
The sent email will show up in the sent inbox of the integrated Gmail account:

Please Note:

Gmail supports only ~500 emails per day and emails beyond that will be unsuccessful.

All subsequent messages in the email thread will be in sync. Outbound emails from your email will reflect in the CRM and vice versa.
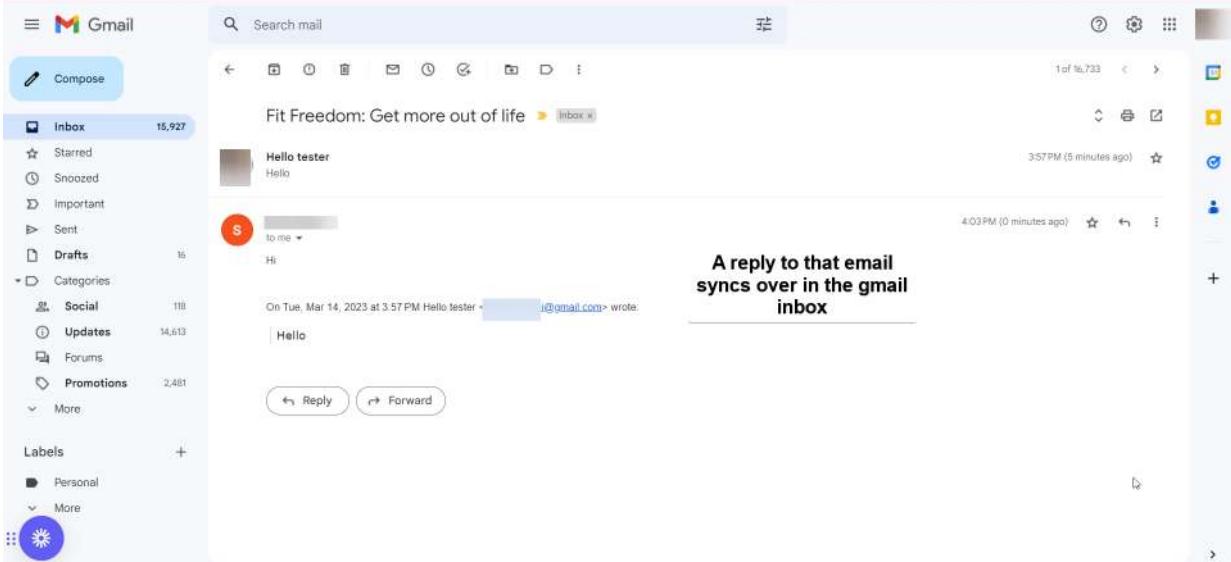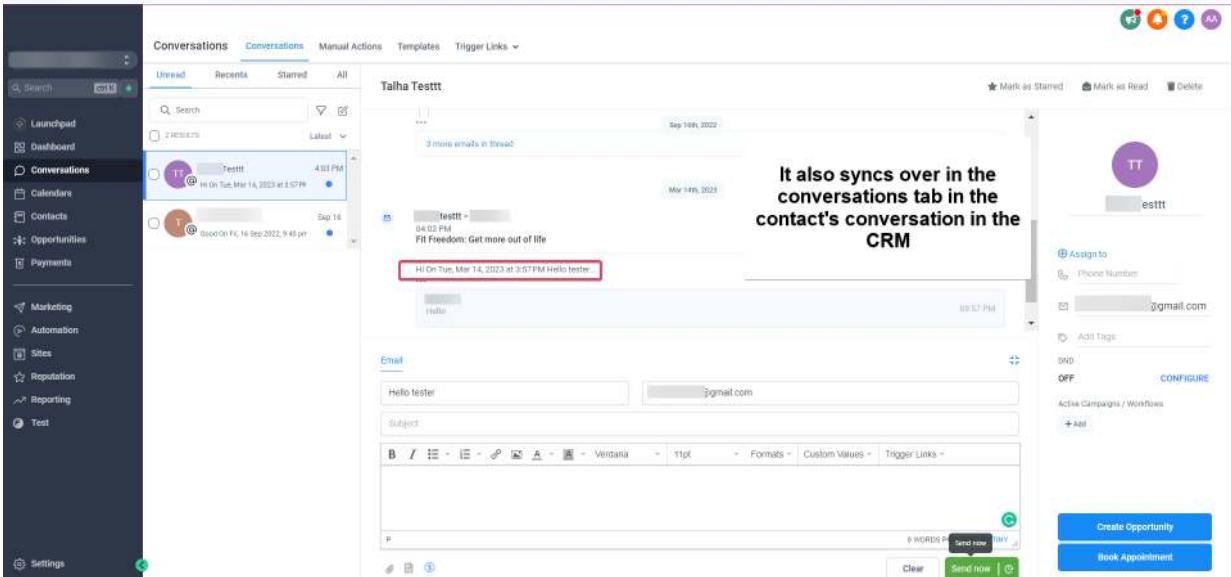
Please Note:

The supported attachment size limit for Gmail Two way sync is **25 MB.**

Other functionalities

Update Email:

This helps users change their connected email ID to another without disconnecting the previous connection.
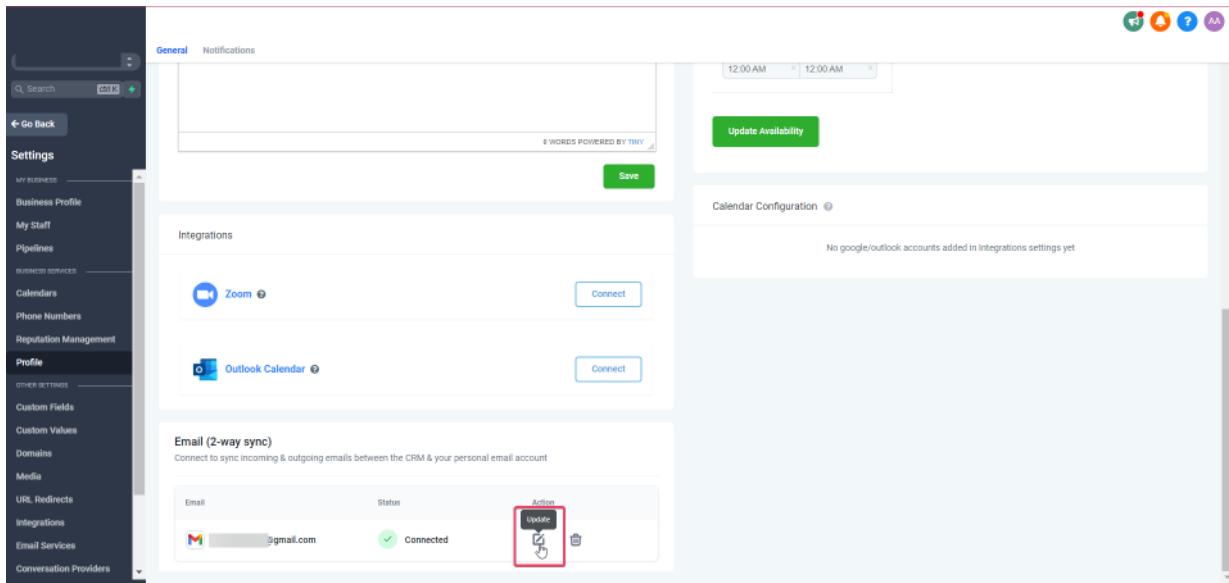
New outbound emails from the CRM will start syncing with the newly added email address. Upcoming messages in the previously connected email ID (same thread) will stop syncing between the CRM & personal email.

Disconnect Email:

This helps users to disconnect their connection and stop the sync with the CRM. Post disconnect, emails or messages will not sync between both platforms.
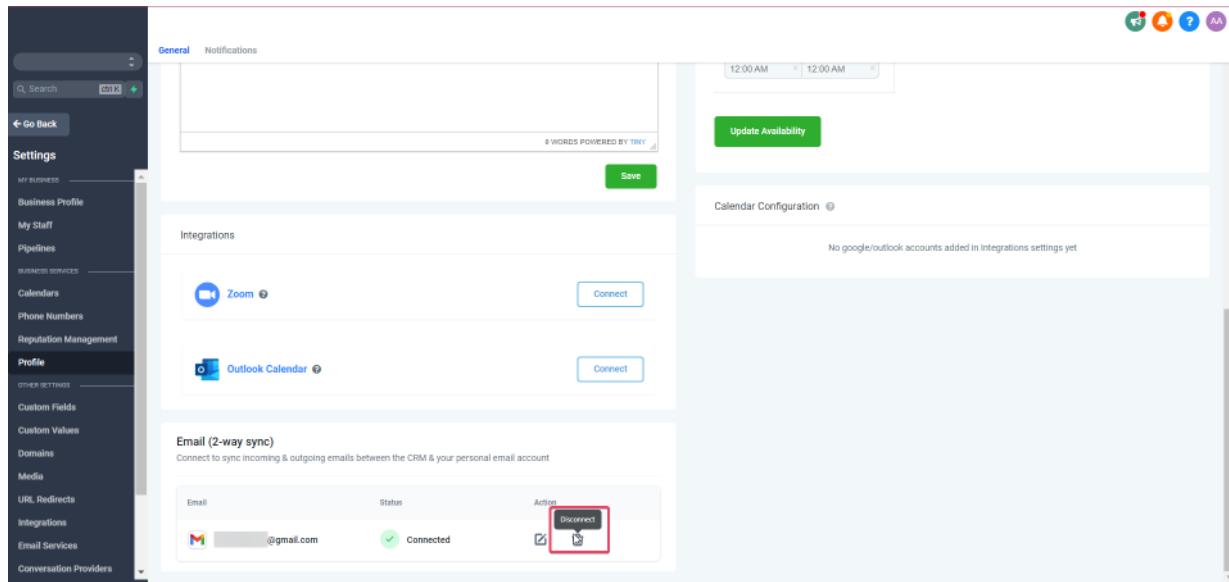
BCC Address

You can include the BCC Address in the Cc or Bcc field when sending an email from Gmail/Outlook. Doing so will automatically add the contact and conversation to your CRM, streamlining communication and ensuring all relevant data is centralized. Going forward, any emails received from this contact at the Gmail/Outlook inbox level will automatically sync with CRM.
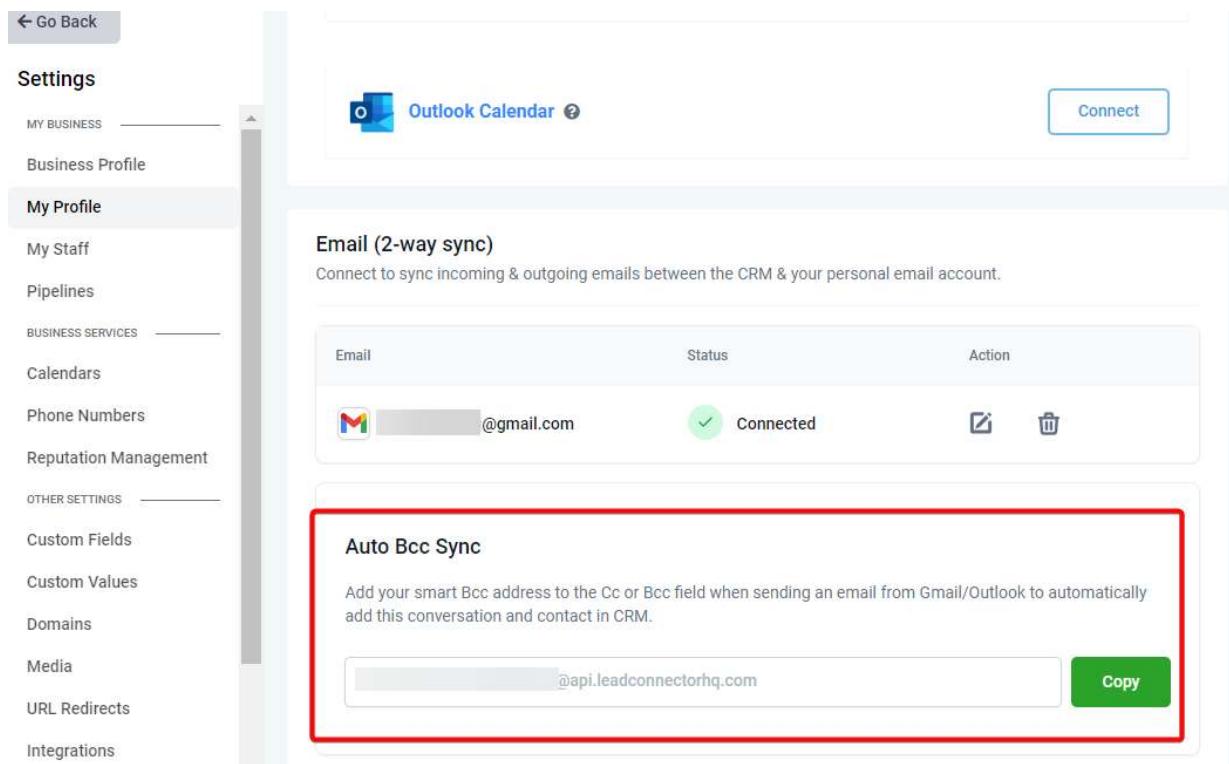
Please Note:

> You may receive a "Delivery incomplete" error from Gmail when using BCC addresses. This occurs because we use BCC for logging purposes, a
>
> Despite the error, your message might still be successfully posted to the CRM.

Does Two-way sync only work with individual emails or bulk emails and workflows?

How the sender domain mapping works for different types of emails:

Individual Email: On connecting a personal email account (Gmail), the Gmail email ID will be considered the sender domain for the emails the user sends for individual emails. Individual emails are sent directly from Gmail when 2-way sync is activated for the user. Be aware that Google sets a limit of 500 emails daily, which applies to this functionality.

Bulk Email: This will continue to be sent from the sub-account level email provider. 2-way sync won't affect this.

Workflow & Automation: In terms of automated emails, they are not sent from the 2-way sync but dispatched from the defined sub-account level providers. This arrangement seamlessly integrates your automated CRM workflows and the email dispatch system.

Please Note:

> With this setup, users can leverage the 2-way sync for their one-on-one emails while also successfully sending bulk emails. The Gmail-imposed l

FAQs

What happens to emails received from existing contacts?

All inbound emails from existing contacts will be reflected in your CRM and Gmail/Outlook inbox. This bidirectional synchronization ensures that you have a complete record of all your communication on both platforms.

Will removing a synced account delete existing emails?

No, removing a synced account will not delete any existing emails. Your previously synced emails will remain intact, and the synchronization will only affect new emails sent or received after the account is removed.

Do new emails get synced after an account is removed?

New emails sent or received after removing the account will not be synced between the CRM and Gmail/Outlook. The synchronization between the two platforms will continue for existing emails, and new emails will not be included in the sync.

Will all my existing contacts in Gmail be synced with the CRM?

Yes, the Two-Way Sync identifies and syncs existing contacts from Gmail to the CRM. Incoming emails from these contacts are automatically populated under the respective contact, but past emails (prior to the integration being connected) cannot be synced over.

What happens when a new email is received from a contact?

New incoming emails from existing contacts will be reflected as new emails in the CRM and Gmail. If the email belongs to an existing conversation thread, it will be displayed as a new email within the same thread.

What happens to sent emails from the CRM or Gmail?

Outgoing emails sent from the CRM will be auto-logged in the Sent folder of the synced mail. Conversely, emails from the synced mail provider will automatically appear under the corresponding CRM contact's conversations.

How are cc/bcc recipients handled in the sync?

If a user is cc'ed or bcc'ed, or included in multiple recipients in Gmail, this information is reflected under the respective contact in the CRM, ensuring comprehensive visibility of all communications. No new contacts are created for the CC and BCC email address.

What if a contact emails someone else but includes the CRM user?

In this case, the email will be reflected under the CRM, associating it with the respective contact, maintaining the complete conversation history.

How is the conversation thread managed when multiple recipients are involved?

In case of multiple recipients (to) in an email, the first contact becomes the conversation tab in the CRM. All subsequent emails will appear in this thread.

What if the same contact exists in multiple locations for the same synced email address?

Email originating from the CRM will be reflected only in the respective location. Subsequent replies and communication should also be specific to that location. However, emails from a contact to the CRM user should be reflected in all locations.

What is BCC Address, and how does it work?

You can include the BCC Address in the Cc or Bcc field when sending an email from Gmail/Outlook. This automatically adds the conversation and contact in the CRM, streamlining communication and data management.Going forward, any emails received from this contact at the Gmail/Outlook inbox level will automatically sync with CRM.

How is the secure connection handled if Gmail login credentials change?

In case of changed login credentials, the CRM will require you to reauthenticate and resync the email to maintain a secure connection.

What happens when an email is forwarded from Gmail?

Any forwarded email to an existing contact will be treated as a sent email and synced under that contact in the CRM.

What if there are duplicate emails with multiple contacts?

Duplicate emails sent to multiple contacts will be associated with the first created contact in the CRM.