Email sync in a CRM, explained.

Email sync is four separate capabilities wearing one name. A vendor-neutral reference for the team about to connect an inbox.

FOR TEAMS OF 1 TO 50 ABOUT TO CONNECT AN INBOX.

INBOX

01 LOGGING	02 TWO-WAY	03 CAPTURE	04 ASSOCIATION

[01] THE FOUR CAPABILITIES

One label, four separate jobs.

When a tool says it "syncs with Gmail," it can mean any one of these four jobs, or all of them. Each one turns on something different, and each one is worth confirming by name before you connect. Here is what each does on its own, and the question to ask before you turn it on.

[01] LOGGING

A record of what was sent.

WHAT IT DOES

Writes a copy of each message onto the contact or deal, so the activity shows up on the record with the subject, date, and body. It answers one question: did we talk to this client, and when. It does not let you write mail from the CRM.

BEFORE YOU TURN IT ON

Does it log automatically, or only when you BCC a special address or click a button? Manual logging looks like sync in a demo and quietly stops happening by week three.

[02] TWO-WAY SEND AND RECEIVE

A working surface, not a rear-view mirror.

WHAT IT DOES

You write and read mail from inside the CRM, and the same message lands in your normal inbox. Reply from the record and the client sees it from your real address. Reply from Gmail and the CRM shows the reply on the record. This is the job most people picture.

BEFORE YOU TURN IT ON

Confirm two-way by name. Most "syncs with Gmail" claims are one-way logging unless the vendor says otherwise, and one-way only tells you what already happened.

[03] CONTACT CAPTURE

The people you email become records.

WHAT IT DOES

Reads the people you email and creates or updates contact records for them. Email a new prospect and a contact appears in your table, name and address already filled in. No copy-paste, no manual row.

BEFORE YOU TURN IT ON

What triggers a capture, and can you control the rule? A tool that captures every address you ever email, including the dentist and the delivery receipt, turns a clean client book into a list nobody trusts.

[04] THREAD ASSOCIATION

The conversation lands on the right record.

WHAT IT DOES

Attaches each conversation to the account, deal, or contact it belongs to, so the thread shows up where you expect it. This is the job that makes the other three useful. Logging without association is a pile of emails with no home.

BEFORE YOU TURN IT ON

Is matching automatic, or does it leave threads unassigned and waiting for you? Manual assignment is manual work disguised as a feature.

[02] BEFORE YOU CONNECT

Three questions to ask before you connect an inbox.

Connecting an inbox touches private mail, and the decision is easier to make than to undo. Before you click connect, you should be able to answer these three plainly. If a tool cannot, that is the answer.

[01] WHAT GETS SYNCED

All four jobs, or only logging? Every email, or only client threads? Past mail, or only new mail from today forward?

[02] WHICH DIRECTION IT FLOWS

One-way into the CRM, or two-way send and receive? Does a reply from your phone show up on the record?

[03] WHO CAN SEE IT

Does a synced thread become visible to the whole workspace, or only to you and the people on the account? Private mail in a shared system is a real concern. The answer should be explicit, not buried.

[DIRECTION]

One-way logging vs two-way sync

	ONE-WAY	TWO-WAY
Records sent and received mail on the record	✓	✓
Lets you send mail from inside the CRM	•	✓
Replies from your inbox appear in the CRM	sometimes	✓
Replies from the CRM appear in your inbox	•	✓

[CHECK THE EXIT]

Ask what happens when you disconnect before you connect. A clean answer: disconnecting stops new mail from syncing, leaves the already-logged threads on their records, and never reaches into your inbox to delete anything. Your mailbox is yours, with export to CSV or JSON at any time.

[NEXT]

Name the four jobs. Ask the three questions. Connect with your eyes open.

The four jobs hold whether you connect an inbox to a spreadsheet workaround, Pipedrive, HubSpot, Attio, Notion, or Syncek. The point of sync is not the integration. It is being able to answer "what's the status of this account?" without forwarding a thread, because the conversation lives on the record next to the fields and the pipeline it belongs to.

[THE FOUR JOBS]

INBOX

01 LOGGING

02 TWO-WAY

03 CAPTURE

04 ASSOCIATION

[WHERE SYNCEK STANDS]

Syncek does not ship live email sync today. Gmail sync is a named item on the public roadmap. What is live now is the structure email sync attaches to: shared workspaces, role-based permissions, and a record timeline. So when sync lands, the conversation has a record to attach to and a team that can already see it.

A CRM that feels like the spreadsheet you already use, built for teams of 1 to 50.

Learn more at syncek.com

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