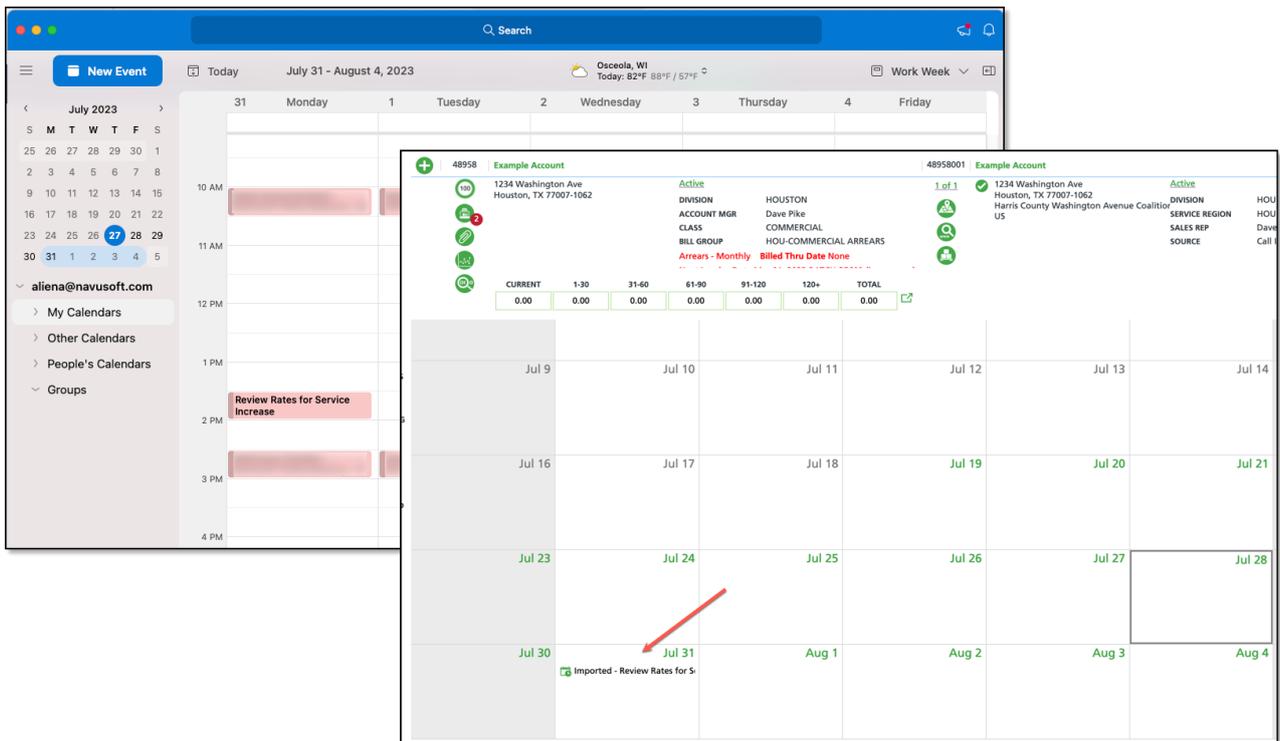


# Sync External Email and Appointments

Last Modified on 03/06/2024 9:51 am EST

Stay on top of email communications and appointments with account contacts by syncing your external email account to Navusoft. After the simple setup process is complete, any new appointments or email communications associated with an account contact will display in both the User Calendar/Appointments screen and in the Customer Calendar it applies. Emails and calendar appointments that do not include the email of an account contact do not sync.



## Logic

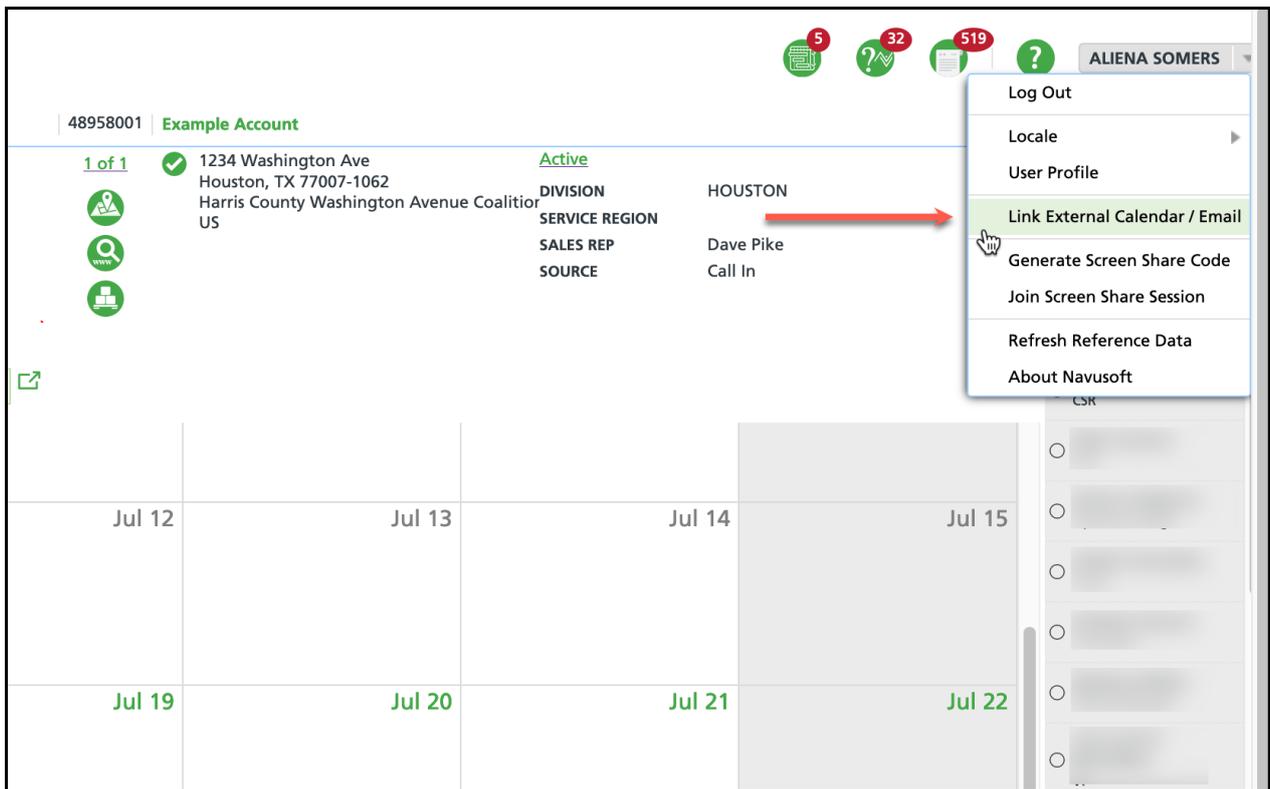
- Only email communications and appointments that have an account contact attached will sync.
- Only new email correspondences and calendar appointments are synced.
- The synchronization is a one-way data pull from the external account into Navusoft, and it refreshes every 15 minutes. Refreshing captures:
  - New emails and replies to emails exchanged between a you and the contact on the account.
  - New appointments and changes to existing appointments, such as modifying the date or time, that were made in your external calendar.

## Setup to Link Your External Email/Calendar Account

Setting up your external email and calendar account to sync with your Navusoft account is a simple and straightforward process. Once linked, the synchronization begins immediately.



Before beginning this process, submit a Ticket Request with Navusoft to review third party integration requirements.



### Setup Steps:

1. In Navusoft, select your **User Profile** drop down that displays your name in the upper right corner of the screen.
2. Select "**Link External Calendar/Email**" from the list of options. This will display an email provider screen for you to select the provider of your external email account.
  - If the correct provider is displayed, simply select "Continue." Otherwise, if you do not see your provider listed, click on "Select a Different Provider" to choose from the available options. You will then be prompted to log into your email account.
3. Click "**Log In**" once you have entered your log in credentials.
  - If the connection is successful, a success message is displayed and the sync is complete.

## Display Locations

Emails and appointments are visible in both the User Calendar/Appointments screen and the Account Calendar of the respective contact with whom email exchanges and appointment invites have taken place.

**User Calendar / Appointments**

July 2023

SUN	MON	TUE	WED	THU	FRI	SAT
Jun 25	Jun 26					
Jul 2	Jul 3					
Jul 9	Jul 10					
Jul 16	Jul 17					
Jul 23	Jul 24					
Jul 30	Jul 31					

**Account Calendar**

48958 Example Account  
1234 Washington Ave  
Houston, TX 77007-1062

Active

1 of 1

48958001 Example Account  
1234 Washington Ave  
Houston, TX 77007-1062  
Harris County Washington Avenue Co  
US

DIVISION HOUSTON  
ACCOUNT MGR Dave Pike  
CLASS COMMERCIAL  
BILL GROUP HOU-COMMERCIAL ARREARS

Arrears - Monthly Billed Thru Date None

CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
0.00	0.00	0.00	0.00	0.00	0.00	0.00

WED	THU	FRI	SAT	SUN
Jul 9	Jul 10	Jul 11	Jul 12	Jul 13
Jul 16	Jul 17	Jul 18	Jul 19	Jul 20
Jul 23	Jul 24	Jul 25	Jul 26	Jul 27
		Imported - New Event - Portal		Imported - test new event - 2
Jul 30	Jul 31	Aug 1	Aug 2	Aug 3
	Imported - Review Rates for S			

## Review Emails

To review email communications exchanged between you and an account contact, click on the email Subject displayed on the calendar. If the date has multiple events listed, double-click on "Events" to access a list of events that include email correspondences. Emails display on the date the email thread started.

The screenshot shows a calendar interface with a notification message overlay. The calendar displays dates from July 18 to August 1. The notification message is titled "NOTIFICATION MESSAGE" and contains the following details:

**NOTIFICATION MESSAGE**

Type: Email  
 Subject: Re: Email Sync - Example  
 Direction: Received  
 From: [Redacted]  
 Sent to: sales@navusoft.com

Message:  
 Thanks! I will be there

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**From:** Matthew Van Doren <sales@navusoft.com>  
**Sent:** Monday, July 24, 2023 4:23 PM  
**To:** John Smith <[Redacted]>  
**Subject:** Testing Email - Nylas

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

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## Review Appointment Details

To review appointments created in your external calendar with an invite sent to an account contact, click on the appointments title displayed on the calendar. If the date has multiple events listed, double-click on "Events" to access a list of events that include appointments.

Calendar interface showing a grid of dates from July 9 to July 31. A red arrow points from the calendar to the 'EDIT APPOINTMENT' modal window.

**EDIT APPOINTMENT**

**Test Nylas**  
Washington Ave  
Houston, TX 77007-1062

**TYPE** Imported

**ASSIGNED TO** Aliena Somers - Admin-NS (Admin)

**APPOINTMENT TIME** 07/31/2023 Mon 11:30 AM 30m

**LOCATION**

**TITLE** Review Rates for Service Increase

**NOTE**

**COMPLETION NOTE**

**COMPLETE?**

**ATTENDEES**

CONTACT NAME	EMAIL	PHONE
Aliena Somers		
John Smith		

**SAVE** **DELETE**