# Sync External Email and Appointments

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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.

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## 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.

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#### 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.

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#### **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.

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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.

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