Calendar Sync for Microsoft and Google

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Overview

Web and Mobile Users can integrate their personal or business Outlook or Google calendars with their serviceminder calendar. This guide walks you through the steps to set up and manage these calendar syncs.

> 🔔 You must have a **Service Agent** linked to your User profile before setting up calendar sync. Without this connection, calendar options will not appear.

This article will review:
- Settings and Navigation
- Connecting with Outlook/Microsoft365
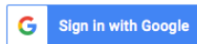- Connecting with Google Calendar
- FAQs

Settings and Navigation

Click the **gear icon** (⚙) in the upper-right corner near the bell and log-out link.

This opens your **Personal Preferences** page. From here, you can connect your Outlook/Microsoft365 or Google Calendar.

Google Calendar

Google Calendar

G **Sign in with Google**

Please enable all requested permissions on the following page or we will be unable to sync your appointments with Google Calendar.

Exchange/Microsoft365

Microsoft365

Connect...

Url*

Username*

Password*

Two-way Settings
☐ Add Time Blocks? ☐ Update Appointments?

Connecting with Outlook/Microsoft365

Connecting with Microsoft365

1. On the **Personal Preferences** page, locate the **Microsoft365** section.

2. Click **Connect** and follow the authentication prompts.

Connecting with Exchange

1. On the **Personal Preferences** page, locate the **Exchange/Microsoft365** section.

2. Enter your Exchange URL (e.g., `https://outlook.office365.com/EWS/Exchange.asmx`)

3. Enter your username and password.

4. Click **Save**.

Two-Way Settings

These checkboxes allow information to sync *from* Exchange *to* service**minder:**
- **Add Time Blocks**: All newly created time blocks created in your Outlook Calendar will sync over to service**minder**
- **Update Appointments**: Updates to appointments in Microsoft will apply to the appointment in service**minder**

You can verify connection status on your **User Details** page. Click the link showing your calendar URL/username to access the **Calendar Sync Events** page. This page displays:

- Synced events within a date range

- Status of each event (e.g., connected to an appointment, time off)

- Errors (e.g., "Unauthorized" if credentials are invalid)

You can use the **Import** button to bring events from Exchange into serviceminder.

> ℹ️ Note that appointments with **Sensitivity** set to **Private** or **Confidential** will import as "Private Event" in service**minder**.

Current Limitations

- **Recurring Appointments:** Not supported. Only one-time events sync.
- **Updates from Exchange:** Changes in Exchange will reflect in serviceminder if **Update Appointments** is enabled.
- **Create Time-Off:** Events created in Exchange (non-recurring) will block off time in serviceminder.
- **One-Way Sync:** Time-offs created in serviceminder do **not** sync back to Exchange.
- **Latency:** Syncs can take up to **1 hour**.

Connecting with Google Calendar

Syncing a Calendar

1. Click the **gear icon** (⚙) from any page to get to the **Personal Preferences** page.

2. In the **Google Calendar** section, click the **Sign in with Google** button.
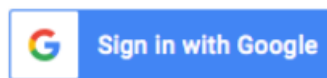
3. Authorize serviceminder to access your calendar.

4. After authorization, you'll return to serviceminder's Google Calendar settings page.

| Bonnie McMurray's Google Calendar Settings | Manual Sync |

Calendar*

| adventuringparties@gmail.com ▼ |

Please select a calendar to synchronize Bonnie McMurray's appointments to.

Update Appointments?

☐

If enabled, any appointments created in serviceminder that are synced with Google Calendars will be automatically updated if the appointment time is changed on Bonnie McMurray's selected calendar.

Cancel Appointments?

☑

If enabled, any appointments created in serviceminder that are synced with Google Calendars will be automatically canceled if the appointment is canceled on Bonnie McMurray's selected calendar.

Add Time Blocks?

☐

If enabled, serviceminder will create time blocks for Bonnie McMurray's schedule from the events created in Google Calendar.

[Save] [Disconnect]

Calendar Sync Settings

- **Calendar Selection:** Choose which Google calendar to sync with serviceminder appointments.

    - Changing this only affects future appointments.

    - If a calendar doesn't appear, ensure it is set to **public.**

- **Update Appointments:** Changes in Google Calendar are reflected in service**minder** (only for events pushed by service**minder**).

    - Be cautious—changes may trigger confirmation emails without conflict checks.

- **Cancel Appointments:** Allows cancellations from Google Calendar to sync to service**minder**.

    - Only enable if your agents are authorized to cancel appointments.

- **Create Time Off:** Events created in Google Calendar will create Time Blocks in service**minder**.

    - These do **not** become full appointments.

- **Disconnect Google Calendar:** The disconnect button in the bottom right corner will end your sync between service**minder** and your Google Calendar.

FAQs

Why don't I see calendar settings in my gear menu?
Ensure your User profile is linked to a Service Agent:

- Go to **Control Panel > Users > Edit User > Settings** tab.

- Under **Service Agent**, select the appropriate agent.

Why does my Outlook calendar pull appointments from other organizations.
If your User is part of multiple orgs, all associated appointments will sync.

I disconnected my calendar. Why is Outlook still showing appointments.
Disconnecting does **not** delete past events. You must remove them manually.