# 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.

## **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.

Google Calendar	
Google Calendar	G Sign in with Google
Exchange/Microsoft365	
Microsoft365	Connect
Url*	
Username*	
Password*	
Two-way Settings	Add Time Blocks? Update Appointments?

service**minder** offers connection to your personal Outlook/Microsoft365 and Exchange calendars. Depending on which you are connecting service**minder** with, the steps vary.

# Connecting with Outlook/Microsoft365

After clicking on the gear icon, you can click on the **Connect** link in the middle of the page next to **Microsoft365** and follow the steps accordingly.

## **Connecting with Exchange**

To connect your personal Microsoft Exchange Calendar to your service**minder** calendar, go to **Control Panel > Users**, click edit on your user. Scroll down to the Exchange/Microsoft365 section.

Enter the URL you use to access your Outlook account. For example:

https://outlook.office365.com/EWS/Exchange.asmx

Enter the username and password for your account. Then click Save on that page.

The user's details page will now show an Exchange/Microsoft365 property if everything is configured correctly. You can verify the credentials by clicking the link with the Url/Username displayed to go to the Calendar Sync events page. This page will show all calendar events in date range specified as well as status information on whether they are connected to appointments or time offs in service**minder**.

If your credentials are not valid, this page will also display an Unauthorized error message. If you get this, go back and re-enter your account credentials.

If an event is listed on Exchange/Microsoft365 but not in service**minder**, you may click the Import action to bring it in.



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

### **Current Limitations**

This integration currently supports only non-recurring appointments. Appointments created in service**minder** will be created as appointments in Exchange/Microsoft365.

If you have **Updates Appointments** enabled, any changes to those appointments in Exchange/Microsoft365 will be reflected in service**minder**.

If you have **Create Time-offs** enabled, any appointments you create in Exchange/Microsoft365 (non-recurring) will be reflected in service**minder** as a time off. Appointments created in service**minder** should reflect on your Exchange/Microsoft365 account within a few minutes.

Like the Google Calendar integration, creating time-offs in service**minder** does not currently create events in Exchange/Microsoft365.

#### Latency

Similar to Google, Exchange/Microsoft365 does not notify service**minder** of any changes in real time. The maximum latency for us to find and update appointments/time-offs with their latest times/etc. is 1 hour.

# **Google Calendar Sync**

This setting only shows if you have a Service Agent attached to your name. For set-up instructions, scroll to the Troubleshooting section at the bottom of the page.

#### Syncing a Calendar

To connect your personal Google calendar to your service agent service**minder** calendar, click on the small cog icon in the upper right-hand corner of any page.

rketPlace	Help!
🌲 🧐   🌣	<u>Log out</u>

Then use the sign in link found in the Google Calendar section (which will look like the Google logo button).

	Google Calendar		
Google Calendar	G	Sign in with Google	

Clicking the link will take you to a page provided by Google that will prompt you to give service**minder** permission to access the calendar.

Once you have completed the authorization process through Google, you'll be taken to the Google Calendar settings page back insider service **minder** where you can select what you'd like to sync over.

nnie McMurray's Go	ogle Calendar Settings	Manual Sync
Calendar*	Comal com Y	
	Please select a colendar to synchronize Bannie McMurray's appointments to.	
Update Appointments?		
	If anoble), any appointments are used in an incominder that are spread with Google Collections will be automationly updated if the appointment time is changed on Bannie MoMurray's selected collection.	
Concel Appointments?		
	If anoble), any oppointments created in servicementer that are synced with Google Collendars will be automatically concelled if the appointment is concelled in Bornie McMunoy's selected collendar.	
Add Time Blocks?		
	If enablied, serviceminder will create time blocks for Bonnie McMurray's schedule from the events created in Google Calendar.	

#### Calendar

Select which calendar to push service **minder** appointments to. Note that if you change this, appointments already pushed to a different calendar will not be moved. It will only affect new appointments.

If your desired calendar is not listed, please verify that the calendar is marked as public. service**minder** is unable to sync with private calendars.

#### What is "Update Appointments"?

Selecting this option will update appointments in service **minder** with changes made to them in Google Calendar. This option only works for appointments pushed to the Google Calendar by service**minder**.

Note that if you enable this and the Service Agent then makes appointment changes, the contact will get notified of the change if there is a confirmation email configured for the appointment. This also does not validate any conflicts with existing appointments, so it's possible for an agent to double book themselves.

## What Is "Cancel Appointments"?

In most cases, you should cancel appointments using service**minder**'s interface. However, for those who would like to be able to cancel appointments easily through Google, this option is for you.

If you have this option enabled, you can cancel appointments using Google's interface and simultaneously cancel the appointment in service**minder**. If your agent should not be able to cancel appointments in the first place, we recommend turning this option off.

#### What is "Create Time Off"?

Since service**minder** needs quite a bit of information to create appointments, it's not possible to take an arbitrary appointment created on the Google Calendar and turn that into a service**minder** appointment.

If this option is enabled, then any appointments created on the selected Google Calendar will map to Time Off entries for the service agent. That will block the time off so service **minder** won't let you create an appointment that will conflict with it.

Only enable these options if the owner of the Google Calendar should be allowed to make arbitrary appointment changes that may generate notifications to the customer. These options default to OFF. The settings are per Service Agent. You may want to enable the options for the owner's calendar but not for the other members of your staff.

#### **Disconnecting Google Calendar**

If you no longer want you google calendar to be sync, click on the small cog icon, click the **Settings** hyperlink which will take you to the Google sync settings page and click the **Disconnect** button.

# FAQs

#### Why don't I see those settings under the Gear settings menu?

You will need to make sure that you have a Service Agent account and that it is attached to your User. You can find that option to add it under **User < Edit < Settings** tab < **Service Agent** box located directly under **Role**. Once connecting, you should see this option appear in the Gear settings.

## Troubleshooting

#### I connected my Outlook calendar but it is pulling in appointments from other orgs.

If your user / service agent are in multiple orgs, then the calendar will pull in appointments from every org you are a member of. For instance, if you are a new user and you were added to your brand's training org and set up your calendar sync, it will pull in all appointments made in that training org.

I cannot see the preferences or any way to link Google Calendar.

- 1. Make sure you have a Service Agent set up. Go to **Control Panel < Service Agents < Add** new (if one is not existing).
- 2. Connect your Service Agent to your User. Go to **Control Panel < User < Edit User < Settings** < select your name from the drop down for "Service Agent".

#### I disconnected my calendar sync but the appointments are still showing in Outlook.

If you had the calendar connected but disconnect it later, that will not delete appointments from your Outlook or Google calendar. You will have to manually remove appointments you no longer want to show.