

Exchange/Google calendar integration

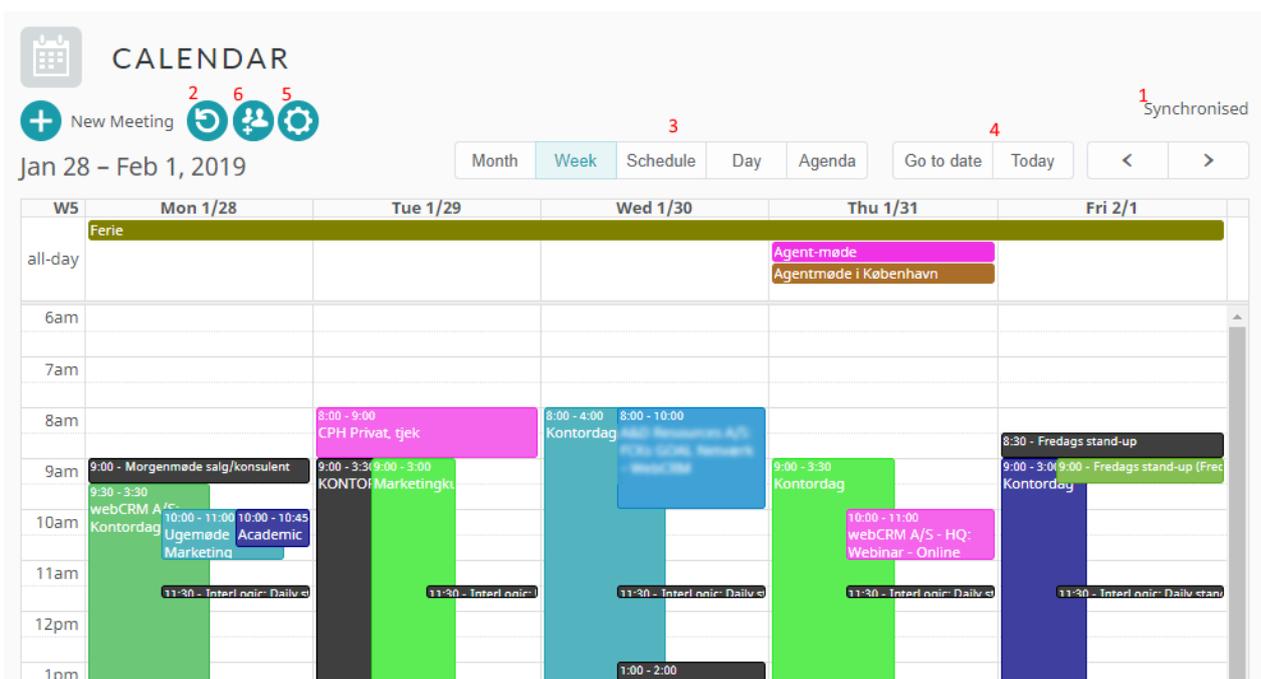
This documentation describes the webCRM integration with Exchange and Google calendars, making the webCRM reflect your calendar from Outlook/Exchange/Google and your phone, if you use the calendar there.

When you enable the integration having previously been using the existing Exchange/Google integration, make sure to:

- Check that the integration is running successfully when you change, so that the latest changes from webCRM are synced to your Exchange/Google calendar
- **Disable** the old calendar sync, by going to Configuration -> Integration -> Exchange/Google and disable sync of **meetings**
- Change which meetings are shown on the organization main view/customer card. This is done on the blue gear icon on the customer card, where you should replace the box of **Meetings** with the box of type **SyncedMeetings** instead
- Update your meeting templates and reports to be of the type **SyncedMeetings**

1. The new calendar interfaces

The calendar interface now reflects the meetings in Exchange/Google calendar and are updated every time the page is loaded. You can see if the calendar is updated in the top right (1). You can manually update the calendar using the update icon if needed (2).



Add the relevant organisation(s) (1), person(s) (2), and possibly other webCRM users (3) in the top three boxes. You also have the option to book the meeting on behalf of another user, which will not add the meeting to your own calendar (4) or create a private meeting (5).

When you add other users, their calendars will also be shown in the calendar view in the right of the screen (6), so that you can make sure not to double book your colleagues.

In the next box you can specify the date and time of the meeting (7), if it is an all-day meeting (8) or a multi-day meeting (9). If you click the calendar in the right side (6), the date and time will be filled out based on where you clicked.

In the bottom, you can give the meeting a subject (10), add a location (11) and add a description (12) or use a template (13). If you use a template, a standard template will be shown, which merges the values from the meeting when the invitation is sent. If you need to manually edit something, tick on the "Edit template" toggle (14), whereby the template will be populated, and you can make your changes.

After you have filled out the fields, you should use the "Save and send invites" (15) to invite the participants.

When you have meetings with other persons or users than just yourself, you should always use the Save and send option when you create and edit meetings, otherwise the changes will only occur in your own calendar.

From your email client or the browser version of your Exchange calendar you can also create recurring meetings that will be shown in webCRM and can be edited from webCRM. *It is not possible* to make meetings recurring from within webCRM, as Exchange has a lot of specific logic for this creation, why such meetings should be created in their original platforms (online, Outlook, Google Calendar or other email programs).

When you have enabled the new calendar and use Exchange meetings in webCRM, you should make templates and reports of the type "SyncedMeetings", instead of the Meeting type. You can change the type of your old meeting templates, but please make sure that all merge-fields for meetings are changed to the new merge fields, in order to avoid sending out code text in the meeting invites instead of the merged values.

EMAIL TEMPLATE | Edit

Type: Mødebekræftelser

Description: Teamviewer (english)

Merging: SyncedMeeting

Email subject: Product

Required access rights to use template

For user: --- All ---

For user language: --- All ---

For territory: Danmark

For user group: --- All ---

Use for campaigns: No

Edit as raw html

2. Activate the new calendar

To enable the new calendar integration, go to Configuration -> Main settings -> Features and enable it in the bottom of the right column.

You can use a combination of Google and Exchange calendars, if your users use different calendar systems. Follow the suiting instructions below.

2.1 Log in with Google calendar

To enable the calendar synchronisation, go to Configuration -> Integration -> Calendar.

Choose Google and click Authenticate and subscribe:

Follow the instructions in the pop-up window to enable webCRM to access your Google calendar. Then click synchronise and the integration is set up.

2.2 Log in with Office 365

To enable the calendar synchronisation, go to Configuration -> Integration -> Calendar.

Choose Exchange, Exchange 2015, OAuth and write your email address. Click Save and subscribe.

You will be redirected and can login to your Exchange account and it will sync to webCRM.

2.3 Log in with your own Exchange server

To enable the calendar synchronisation, go to Configuration -> Integration -> Calendar.

Choose the Basic version (1) and fill out the URL of your Exchange server (2). It should end with: EWS/Exchange.asmx. The URL could look like this: <https://yourdomain.com/EWS/Exchange.asmx>

Check that your email address (3) is correct and type the password to your Exchange account (4). Then click Save and subscribe (5) and Synchronise (6).

If the password or URL is incorrect you will be warned after clicking Save and subscribe, otherwise the synchronisation will start when you click Synchronise, and the icon will start spinning. After that, the user's calendar will be possible to choose in the calendar interface in webCRM. **Be aware** that the Sync status in the bottom is not updated after the sync has run, you must update the page (refresh) to see the correct status.

If you use Impersonation, you must toggle on Impersonation (1) for each user and write the email (2) and password (3) of the Impersonation user. Hereafter you can click Save and subscribe (4) and Synchronise (5) as when using individual login.