

Mail and Calendar Integration Setup

Last Modified on 08/15/2024 4:08 pm EDT

Overview

Order Time is integrated with Gmail, Google Calendar, Outlook365 Mail and Outlook Calendar. Using this integration you can have the system record responses to emails that were sent from Order Time. It will append the response directly to the original activity in the Activity Tab. You can also have responses generate a new Activity. You can have any email sent to an Order Time contact through the integration create a new Activity under that Contact. Responses from Contacts that include an attachment will Attach it to the Activity as well.

Events added in Order Time will appear in your connected Calendar in either service. When you edit, delete or move the Event in Order Time or in your Calendar app, it will sync the change with both.

Activate the Mail and Calendar Integration in Order Time

The first step is to activate the integration. You must be the Master Admin to do this. The Master Admin is the user which Registered for Order Time.

Navigate to settings by clicking on the gear next to your company name on the top-right portion of your screen. Then click **Company Preferences** under the **Settings** column.

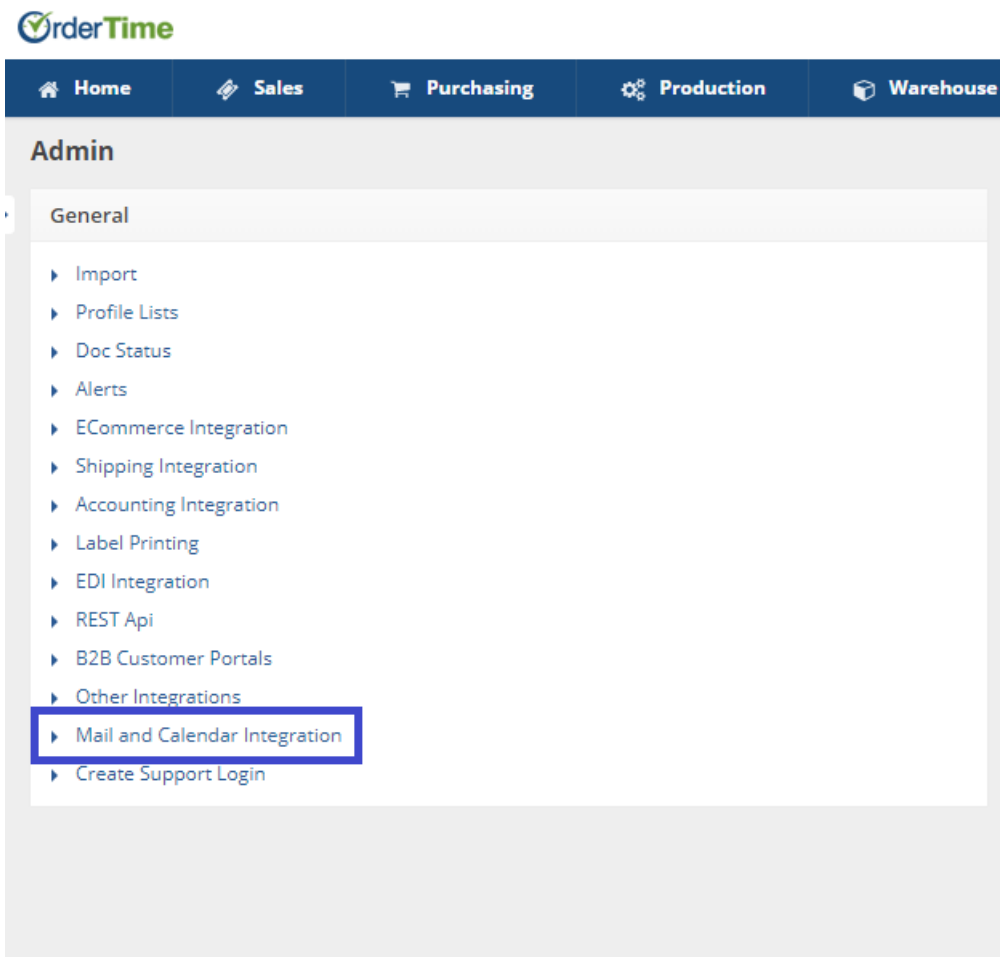
Click on **Mail and Calendar Integration** under the **Company Preferences** and check the boxes for **Mail** and **Calendar**:

Company Preferences

Section
General
Activities
Doc #s
Items
Inventory
Sales
Shipping
Payments
Purchasing
Receiving
Production
Lot / Serial #s
Repair Orders
Mobile
Mail and Calendar Integration

Mail and Calendar Integration

- Mail
- Calendar



Navigate back to settings by clicking on the gear next to your company name on the top-right portion of your screen. Then click **Mail and Calendar Integration** under the **General** column.

Each user can now connect their Email and Calendar with Order Time after the integration has been activated.

This is a User by User integration and must be connected individually from that User's settings.



You will see the screen above, click on the service you wish to connect and click the **Connect** button at the bottom-right. From here you will be taken to an authentication screen. Give permissions to Order Time and authorize the integration by logging into your chosen email & calendar account.

When logging into Office 365 for the First Time, we recommend logging in as an Outlook Admin

You will see a screen similar to this during the authentication process:

This application is not published by Microsoft.

This app would like to:

- ✓ Sign users in
- ✓ View users' basic profile
- ✓ Maintain access to data you have given it access to

Consent on behalf of your organization

If you accept, this app will get access to the specified resources for all users in your organization. No one else will be promoted to review these permissions.

Accepting these permissions means that you allow this app to use your data as specified in their terms of service and privacy statement. **The publisher has not provided links to their terms for you to review.** You can change these permission at <https://myapps.Microsoft.com>. [Show Details](#)

Cancel

Accept

Make sure to check Consent on behalf of your organization and click on Accept.

Now the Order Time application will be saved with consent and the rest of your users can log into Order Time and repeat this process by logging in as themselves when connecting the mail integration.

Utilizing the Mail and Calendar Integration

To send an Email from a transaction like the Sales Order, head to your individual order, click on the Activity History tab and click on Send Email as seen below.

Sales > Sales Orders > Sale Order Created By Ian Benoliel 9/27/2019 12:16 PM Modified By Ian Benoliel 5/5/2021 9:44 AM

Sales Order - 1044 TRANSFER Create PDF Export Print Label Status: Closed

General No. 1044 Customer 1111 Nelson Brothers Change Date 9/27/2019 Promise Date 9/27/2019 Customer PO Contact	Bill Address 1111 NELSON BROTHERS 2550 WYATT STREET FLOOR/SUITE BILL CARE OF WEST PALM BEACH, FL 33404	Ship Address 1111 NELSON BROTHERS SHIP 2550 WYATT STREET SHIP FLOOR/SUITE SHIP CARE OF WEST PALM BEACH, FL 33404	Summary Revision: 1 Subtotal 90.00 Fedx 0.00 Discount -0.00 Additional Fee 0.00 FL-Palm Beach (7.00 %) 0.00 Total Amount 90.00 Paid Amount -0.00 Balance 90.00
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Items Details Memo & Instructions Custom Payments Ship Docs Dependency Attachments Open Activities **Activity History**

Send Email Add Log

TYPE	SUBJECT	CLOSED DATE	DESCRIPTION	ASSIGNED TO	ACTIONS
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You fill out the email, utilize a template if you've set some up, attach a file if need be and click Send.

Sales > Sales Orders > Sale Order Created By Ian Benoliel 9/27/2019 12:16 PM Modified B

Sales Order - 1044 TRANSFER Create PDF Export Print Label S

General No. 1044 Customer 1111 Nel Date 9/27/201 Promise Date 9/27/201 Customer PO Contact	Send Email Contact: <input type="text"/> Additional To: <input type="text" value="ianb@numbercruncher.com"/> CC: <input type="text"/> BCC: <input type="text"/> Template: <input type="text"/> Subject: <input type="text" value="Test to myself"/> Body: <input type="text" value="Hello"/> Attachment: Attach File <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>FILE:</th> <th>SIZE:</th> <th>ACTION:</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>	FILE:	SIZE:	ACTION:				Summary Revision: 1 Subtotal Fedx Discount Additional Fee FL-Palm Beach (7.00 %) Total Amount Paid Amount Balance
FILE:	SIZE:	ACTION:						

Send Cancel

The Email will appear in your inbox now on Gmail or Outlook365 Mail. It also appears under the Activity History Tab.

Items Details Memo & Instructions Custom Payments Ship Docs Dependency Attachments Open Activities **Activity History** balance 09/05/2021

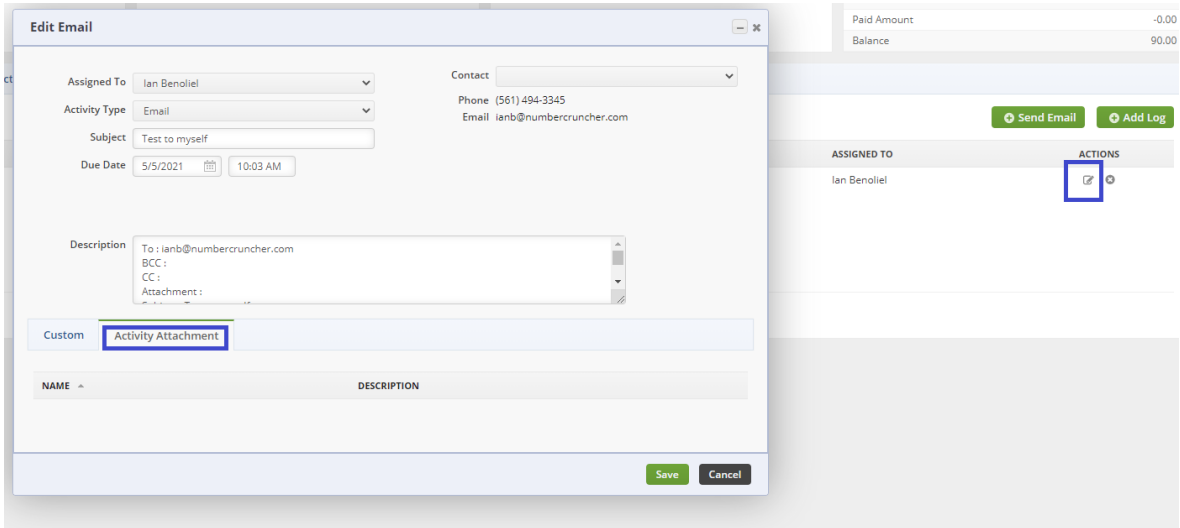
Send Email Add Log

TYPE	SUBJECT	CLOSED DATE	DESCRIPTION	ASSIGNED TO	ACTIONS
Email	Test to myself	5/5/2021 10:03 AM	To: ianb@numbercruncher.com BCC: CC: Attachment: Subject: Test to myself Body: Hello	Ian Benoliel	✎ 🗑

Total Records: 1

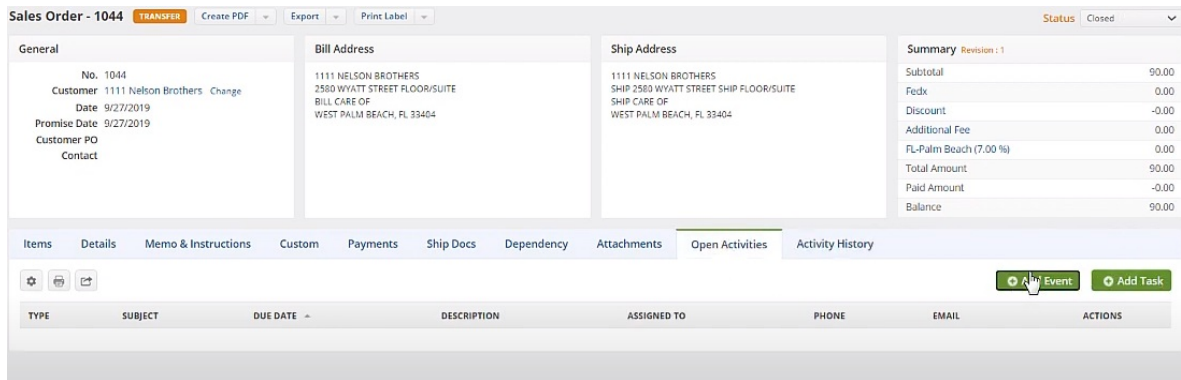
If the response includes an attachment, the attachment can be seen by clicking on the Edit icon to

the right of the Activity and then clicking the Activity Attachment Tab to view them.



To create an Event on a transaction, head to the transaction like this Sales Order and click on the Open Activities tab.

Click on the Add Event Button to get started.



Set up your event as a new meeting, choose the dates, add a description if necessary and hit Save.

Add / Edit Event

Assigned To: Ian Benoliel

Activity Type: Event

Subject: A new meeting

All Day:

Due Date: 5/5/2021 12:00 PM

End Date: 05/05/2021 01:00 PM

Description:

Contact:

Phone:

Email:

Recurrence:

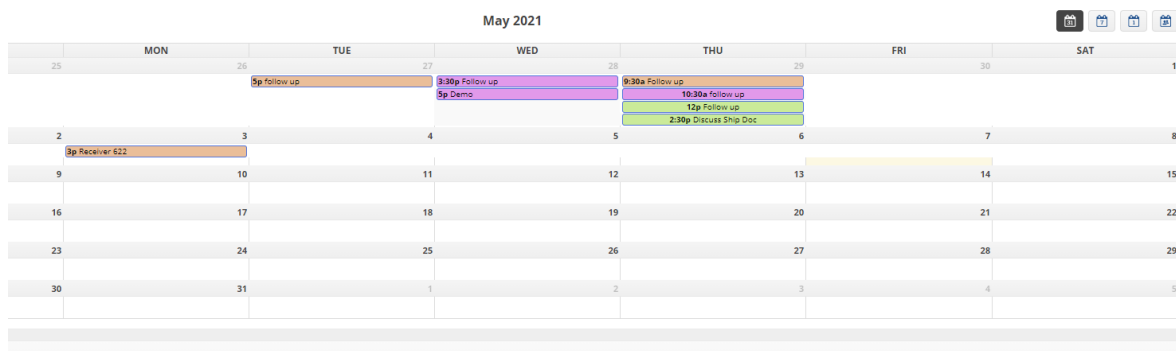
Custom | **Invitees**

Ian Benoliel

May 5, 2021

NAME	6AM	7AM	8AM	9AM	10AM	11AM	12PM	1PM	2PM	3PM	4PM	5PM
Ian Benoliel												

This event will now show up under Open Activities in the Transaction / Sales Order. It also shows on the Calendar on the Home page of Order Time as well as on your connected Calendar via the integration!



How Do Events in Order Time and My Calendar of Choice Sync?

- **You must add the Event in Order Time**, it can not be added in your Calendar App
- This will **automatically add** the Event to you Calendar App of choice
- When you **Edit / Move / Delete** an event in either Order Time OR your Calendar App it will sync!

Disconnecting the Mail and Calendar Integration

To disconnect your Email account and Calendar from Order Time, simply head to the settings by clicking on the gear next to your company name on the top-right portion of your screen. Then click **Mail and Calendar Integration** under the **General** column.

Click on the service you would like to disconnect ie. Google Suite or Outlook 365 and then click on the green **Disconnect** button.