

Mail and Calendar Integration Setup

Last Modified on 12/10/2021 9:53 am EST

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.

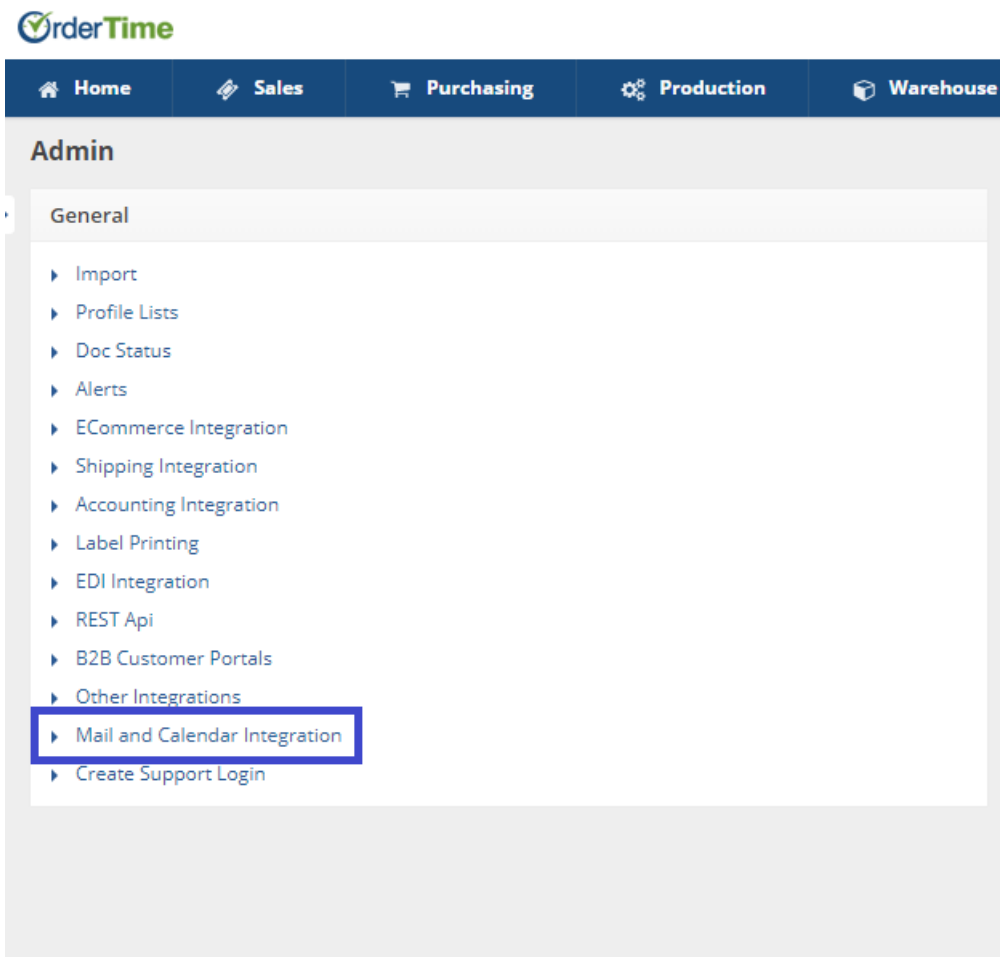
Click on **Mail and Calendar Integration** under the **Company Preferences** and check the boxes for **Mail** and **Calendar**:

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.

Note: 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.

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.

The screenshot shows the 'Sales Order - 1044' interface. The top navigation bar includes 'Sales > Sales Orders > Sale Order', a 'TRANSFER' button, and options for 'Create PDF', 'Export', and 'Print Label'. The status is 'Closed'. The main content area is divided into three columns: 'General' (No. 1044, Customer: 1111 Nelson Brothers, Date: 9/27/2019, Promise Date: 9/27/2019, Customer PO, Contact), 'Bill Address' (1111 NELSON BROTHERS, 2580 WYATT STREET FLOOR/SUITE, BILL CARE OF, WEST PALM BEACH, FL 33404), and 'Ship Address' (1111 NELSON BROTHERS, SHIP 2580 WYATT STREET SHIP FLOOR/SUITE, SHIP CARE OF, WEST PALM BEACH, FL 33404). A 'Summary' table on the right shows: 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), and Balance (90.00). Below the summary is a tabbed interface with 'Activity History' selected. A 'Send Email' button is highlighted in the top right of the Activity History section.

You fill out the email, utilize a template if you've set some up, attach a file if need be and click Send.

The screenshot shows the 'Send Email' dialog box overlaid on the Sales Order interface. The dialog has fields for 'Contact' (dropdown), 'Additional To:' (text input with 'ianb@numbercruncher.com'), 'CC:', 'BCC:', 'Template:' (dropdown), 'Subject:' (text input with 'Test to myself'), and 'Body:' (text area with 'Hello'). There is an 'Attach File' button and a table for attachments with columns 'FILE:', 'SIZE:', and 'ACTION:'. At the bottom right are 'Send' and 'Cancel' buttons.

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

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

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.

Edit Email

Assigned To: Ian Benolie! Contact: [dropdown]

Activity Type: Email Phone: (561) 494-3345

Subject: Test to myself Email: lanb@numbercruncher.com

Due Date: 5/5/2021 10:03 AM

Description: To : lanb@numbercruncher.com
BCC :
CC :
Attachment :

Custom: **Activity Attachment**



NAME	DESCRIPTION

Save Cancel

Paid Amount: -0.00

Balance: 90.00

Send Email Add Log

ASSIGNED TO	ACTIONS
Ian Benolie!	 

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.

Sales Order - 1044 Status: Closed

<p>General</p> <p>No. 1044</p> <p>Customer 1111 Nelson Brothers Change</p> <p>Date 9/27/2019</p> <p>Promise Date 9/27/2019</p> <p>Customer PO</p> <p>Contact</p>	<p>Bill Address</p> <p>1111 NELSON BROTHERS 2580 WYATT STREET FLOOR/SUITE BILL CARE OF WEST PALM BEACH, FL 33404</p>	<p>Ship Address</p> <p>1111 NELSON BROTHERS SHIP 2580 WYATT STREET SHIP FLOOR/SUITE SHIP CARE OF WEST PALM BEACH, FL 33404</p>	<p>Summary Revision: 1</p> <p>Subtotal 90.00</p> <p>Fedx 0.00</p> <p>Discount -0.00</p> <p>Additional Fee 0.00</p> <p>FL-Palm Beach (7.00%) 0.00</p> <p>Total Amount 90.00</p> <p>Paid Amount -0.00</p> <p>Balance 90.00</p>
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Add Event Add Task

TYPE	SUBJECT	DUE DATE	DESCRIPTION	ASSIGNED TO	PHONE	EMAIL	ACTIONS

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

Add / Edit Event
[-] [x]

Assigned To: Ian Benoliel v

Activity Type: Event v

Subject: A new meeting

All Day:

Due Date: 5/5/2021 📅 12:00 PM

End Date: 05/05/2021 📅 01:00 PM

Description:

Contact: v

Phone:

Email:

Recurrence:

Custom
Invitees

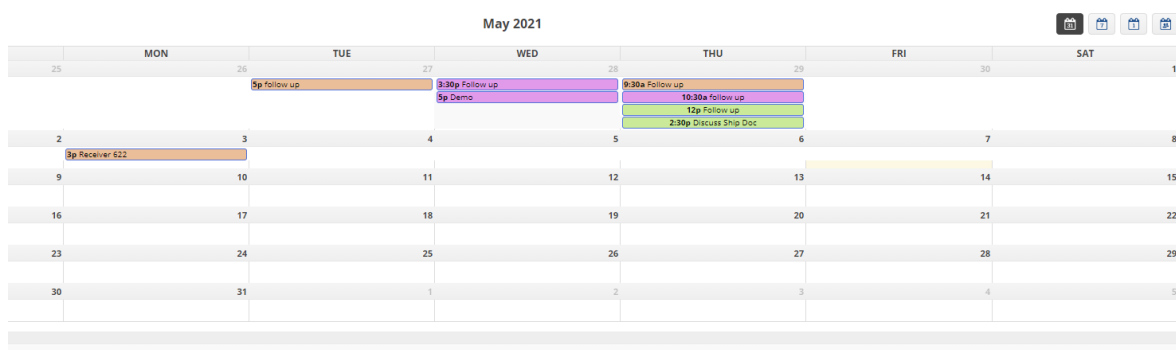
Ian Benoliel Add

May 5, 2021

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

Save
Cancel

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.