



## *BluWave* crm

**Posting Appointments into Your Gmail Calendar**

**BluWave crm** can automatically post your appointments into your Gmail Calendar. If this function is activated by the user then your customer can also be invited (he will receive an emailed invitation). At booking time the user can elect NOT to invite the customer.

## Setting Up

To use this function, each user is required to enter their email login name and password as well as the Simple Mail Transfer Protocol (SMTP) settings under the “Edit my Profile” menu. Please see below.

**Activate the posting of appointments to your email calendar here**

**NB: Each users that will send emails via BluWave CRM are required to enter this details under their profile.**

Enter the required SMTP details on the fields shown above.

E.G. For a user using Gmail for as their primary email address. The SMTP details will be as follows:

**SMTP :** smtp.gmail.com

**User Name:** users email address (e.g. [samuel@gmail.com](mailto:samuel@gmail.com))

**Password:** Password you use to log in your Gmail account

Once done, click on “Update Details” to save the settings.

## Posting Appointments to Gmail Calendar

Book appointment as usual in BluWave CRM and click “save”

**Add Appointments** Save Save & New Cancel

Appointment Details \* = Required Fields

Sales Staff: Denzil Govender

Company: ABC Manufacturing \*

Contact: Denzil Govender Mr +\*  Invite Contact?

Location: ABC House 18 Curzon Rd Bryanston [View Map](#)

Activity: Present Proposal \*

Task?

Start Date: 28/09/2011 12:00

End Date: 28/09/2011 16:00

Note: Discuss proposal.

Completed?

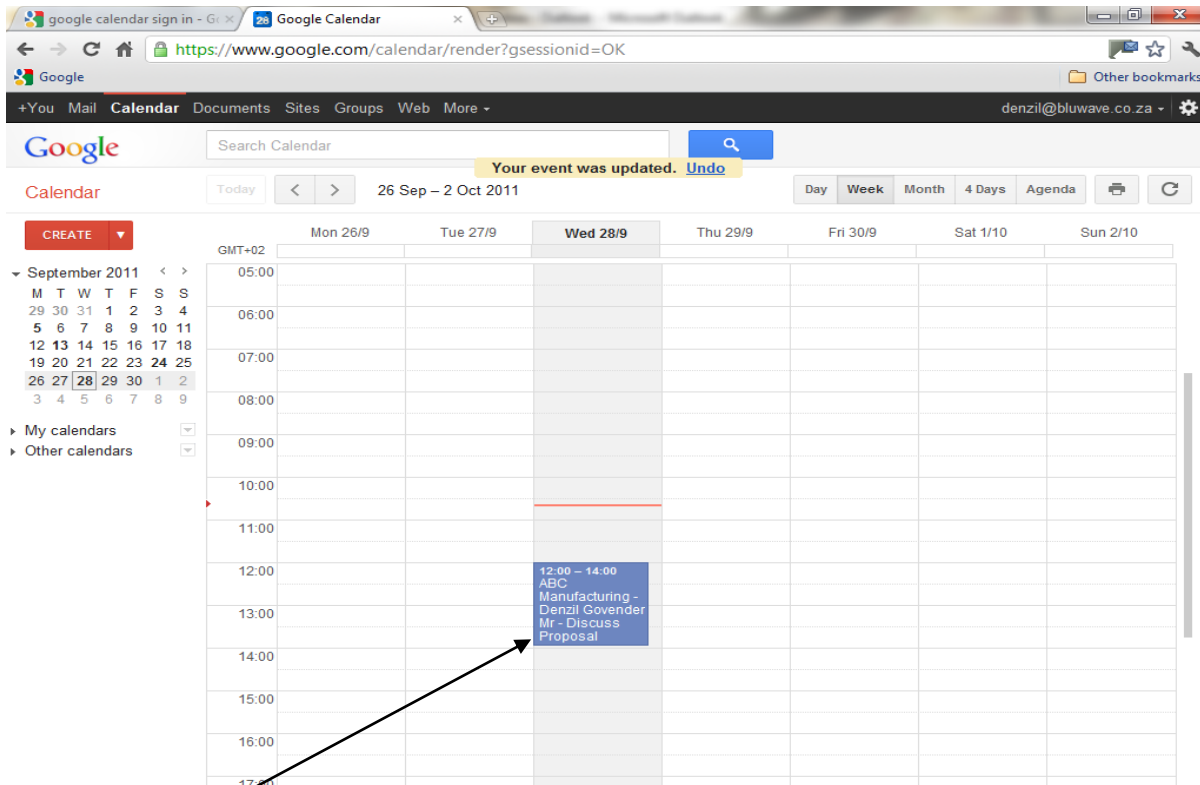
Save Save & New Cancel

**Invite Contact?** – this option defaults to “On”. If on the system will send an appointment invitation to your customer that he can accept into his calendar software – supports most email clients including MS Outlook, Lotus Notes, Gmail and any other. If you do not wish to send an appointment invitation to your customer then uncheck this box.

**Task?** Please note that if you indicate that this activity is a Task, the system will NOT post this activity to your calendar. This check box should NOT be checked if you wish to post an appointment.

Click **Save** or **Save & New** and complete the steps below to post this appointment to your calendar.

The booked appointment will be posted to the BluWave calendar as well as your Gmail Calendar instantaneously as shown below.



Double clicking on the saved appointment in your calendar opens it up for editing and you can view your clients details i.e. Tel No, physical location, as well as notes you had entered for the appointment as shown below.

