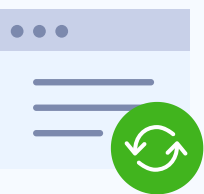# Google Outlook Calendar Sync Connector

Synchronise your calendars and exchange with the Tasks in your LeadSquared CRM system. Refer to your LeadSquared calendar to stay updated with what you've got planned for the month and never miss out on important tasks and meetings.

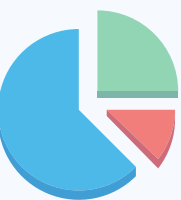## Google Outlook Calendar Sync Connector - Features and Benefits

Two-way Sync

Use the two-way calendar sync to save time on organising your tasks across two locations
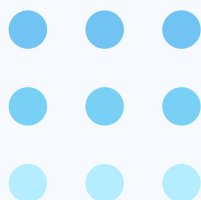
User Management

Ability to view, disable sync and view logs of all the users in a single screen whose accounts are connected in Calendar sync
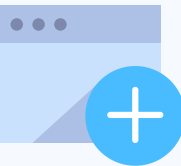
View Logs

Detailed logs for each lead & task and also get Webhook response & Task API response along with any error logs

Choose place to push data

When any event is created in Primary Calendar it will be synced as specific task type in your LSQ account and vice-versa

All your meetings at one place

Bring in Internal meetings and meetings scheduled with existing leads in calendar as tasks in LSQ for a particular user

Brands can expand their reach, improve lead tracking rate, and also achieve some of their critical business goals.
Industries that have seen success with Google Outlook Calendar Sync connector include:
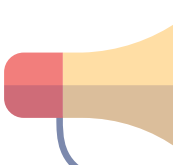
EduTech

E-commerce

Banking & Finance

Healthcare

Hospitality

Marketing

Important Digits - Impact of Google Outlook Calendar Sync in business

41% Increase
In Customer conversion rates

3x Boost
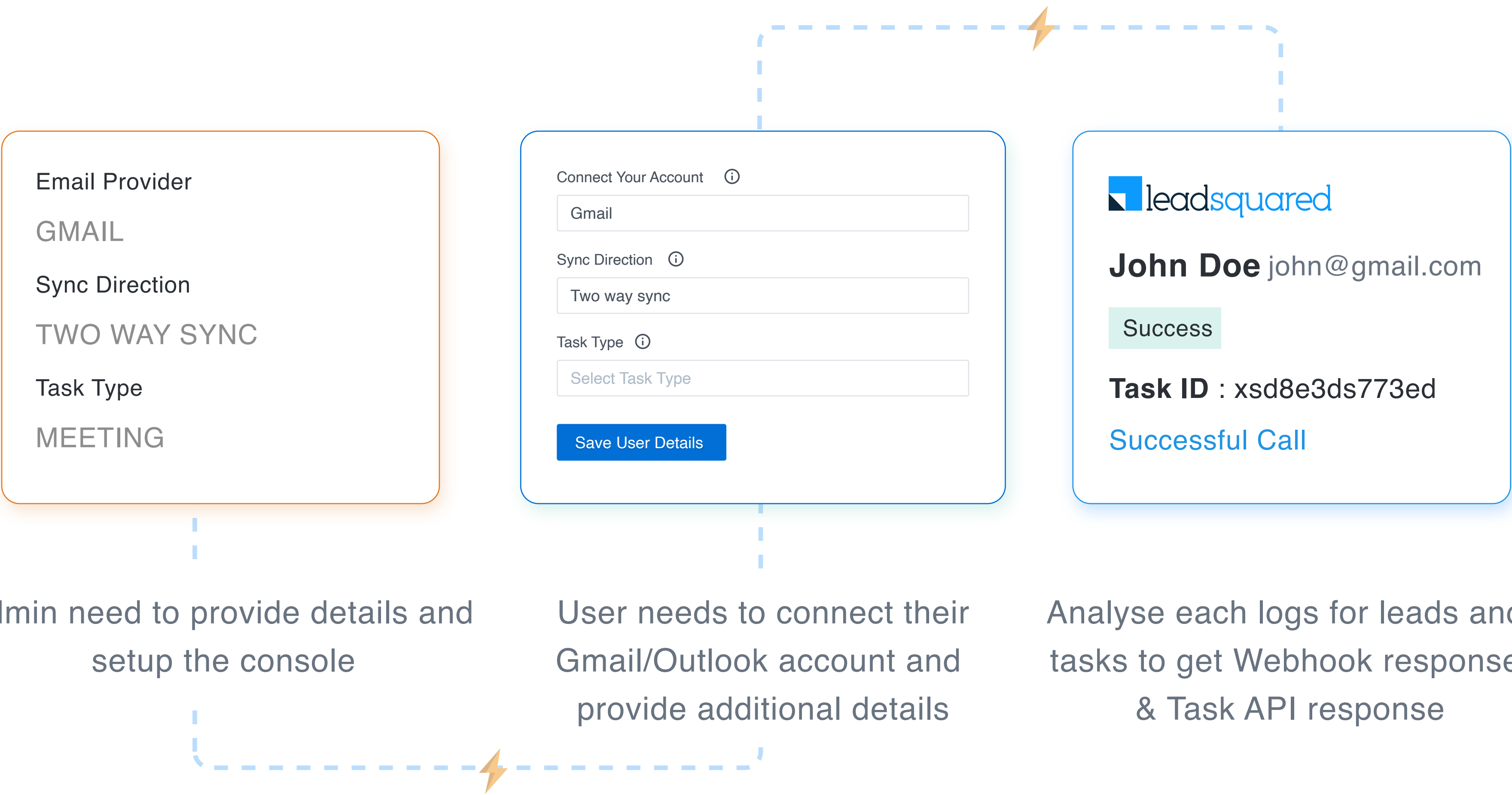In Return on Investment (ROI)

53% Sales Lift
In some product areas

14% Fall
In Customer Churn Rate

Source : Wikipedia, Google, Microsoft, Medium, Webengage & Learning Catalyst

# User Journey : How Google Outlook Calendar Sync connector works

Email Provider
GMAIL
Sync Direction
TWO WAY SYNC
Task Type
MEETING

Connect Your Account
Gmail
Sync Direction
Two way sync
Task Type
Select Task Type
Save User Details

leadsquared
John Doe john@gmail.com
Success
Task ID : xsd8e3ds773ed
Successful Call

Admin need to provide details and setup the console

User needs to connect their Gmail/Outlook account and provide additional details

Analyse each logs for leads and tasks to get Webhook response & Task API response

leadsquared

ADMIN SECTION

Step 1 : Calendar Sync Connector - Landing Page

The Admin starts the process of configuring the calendar sync connector from this landing page. The "**Get Started**" button is from where the admin can start the configuration process for both their own account as well as for the other users.
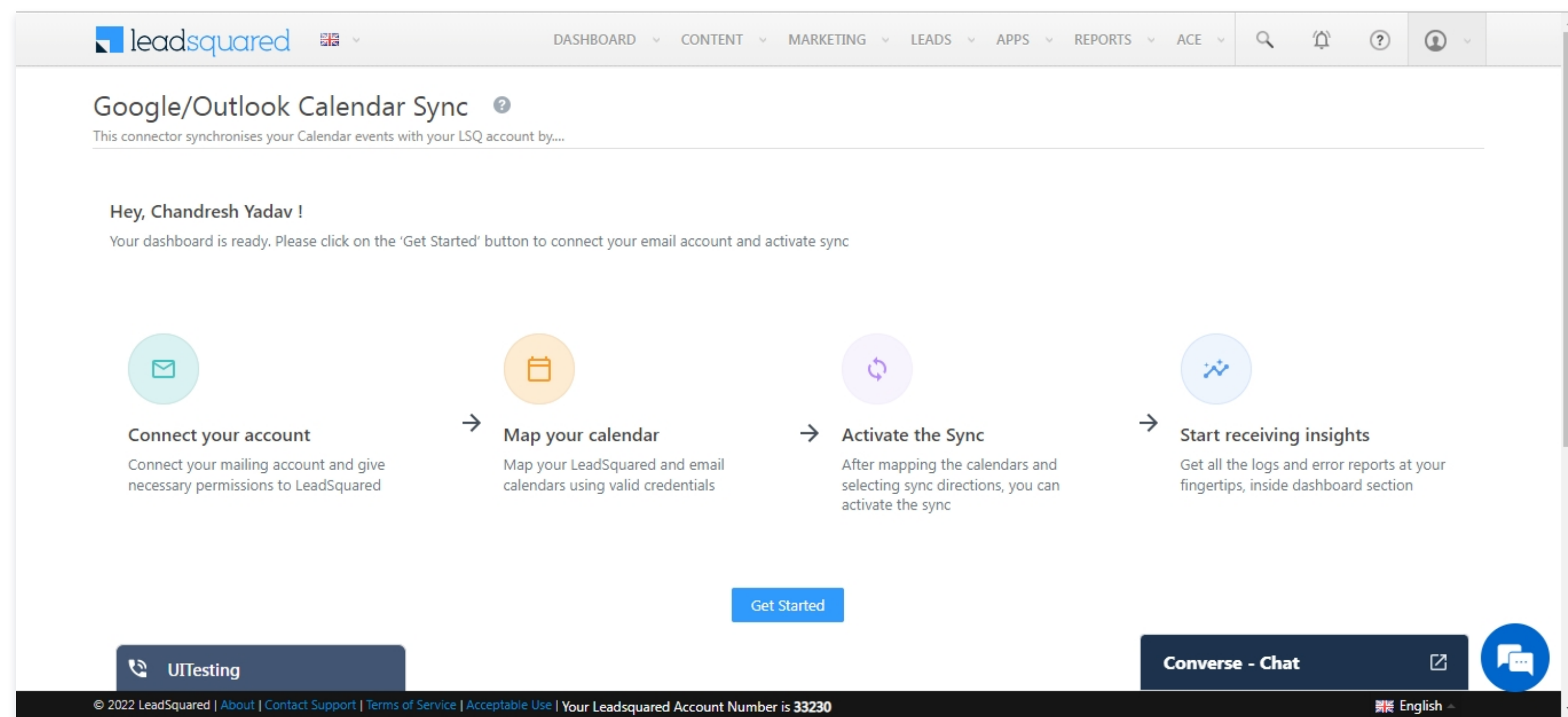

Step 2 : Admin Configuration for Calendar Sync Connector

Admin needs to configure which mail account is to be connected to the calendar sync. They can select either **Gmail - Google** or **Outlook - Microsoft** to be their primary email provider to initiate the calendar sync.
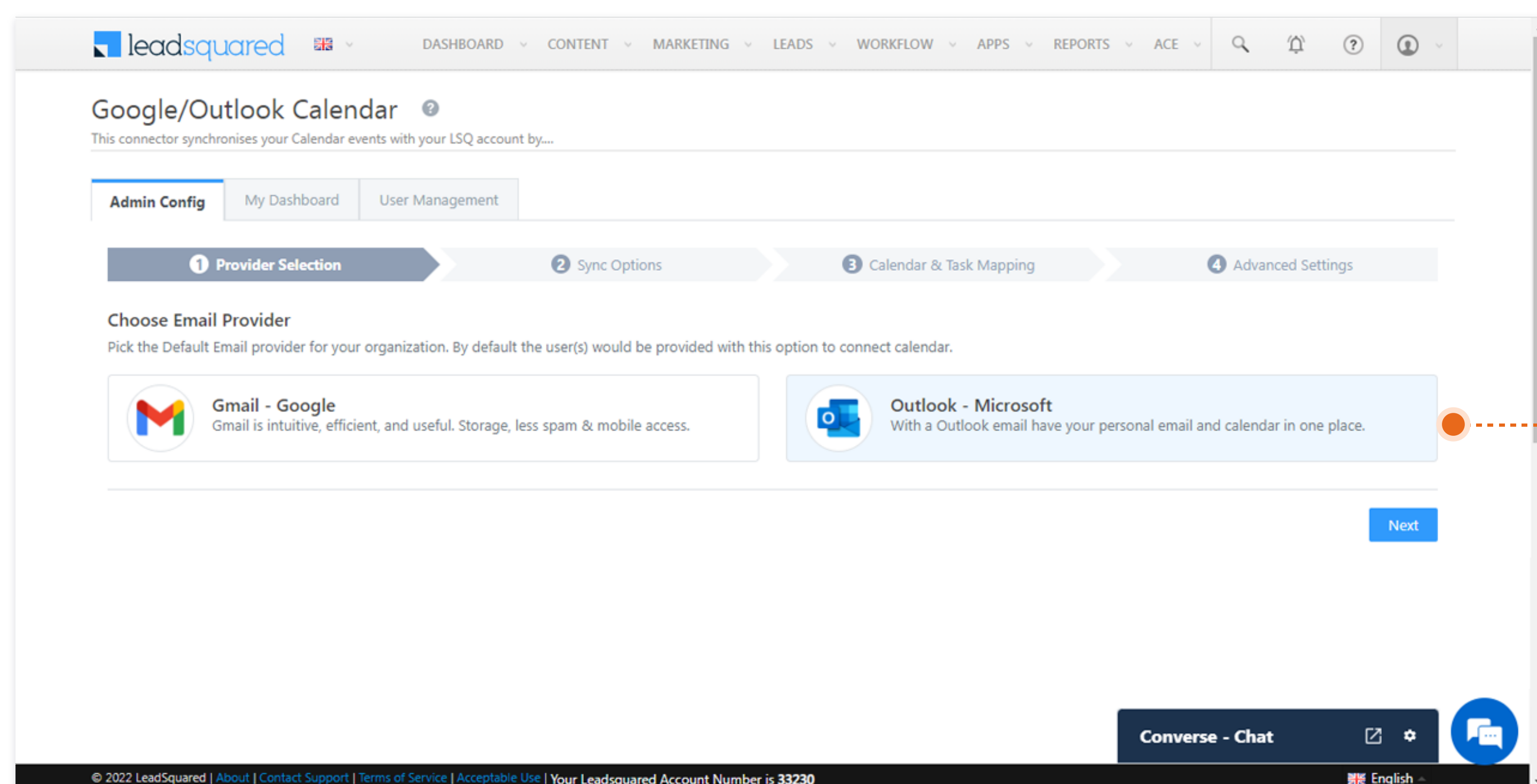
Admin needs to select between Gmail
And outlook to set as primary provider
Account for calendar sync

Once the email provider is selected the admin clicks the next button where they can configure the **Sync Options** for their selected provider.
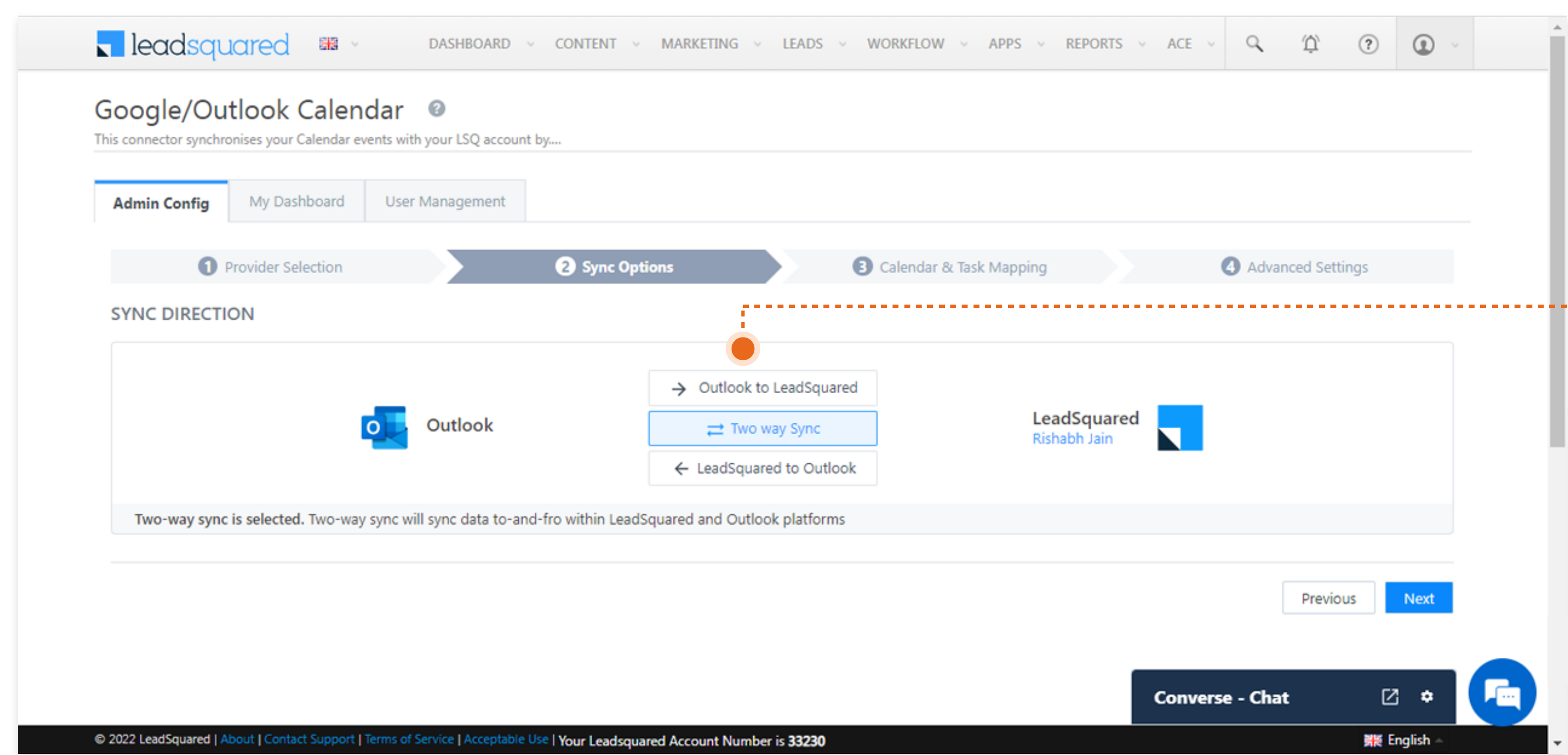
Admin can decide if they want it to function as a two way sync or only in a specific direction of sync

Step 3 : Task Mapping

Post completion of the configuring the sync type they need to set up **calendar** and **task mapping**. Here the admin user can set up the specific task type to work as per the email provider chosen.
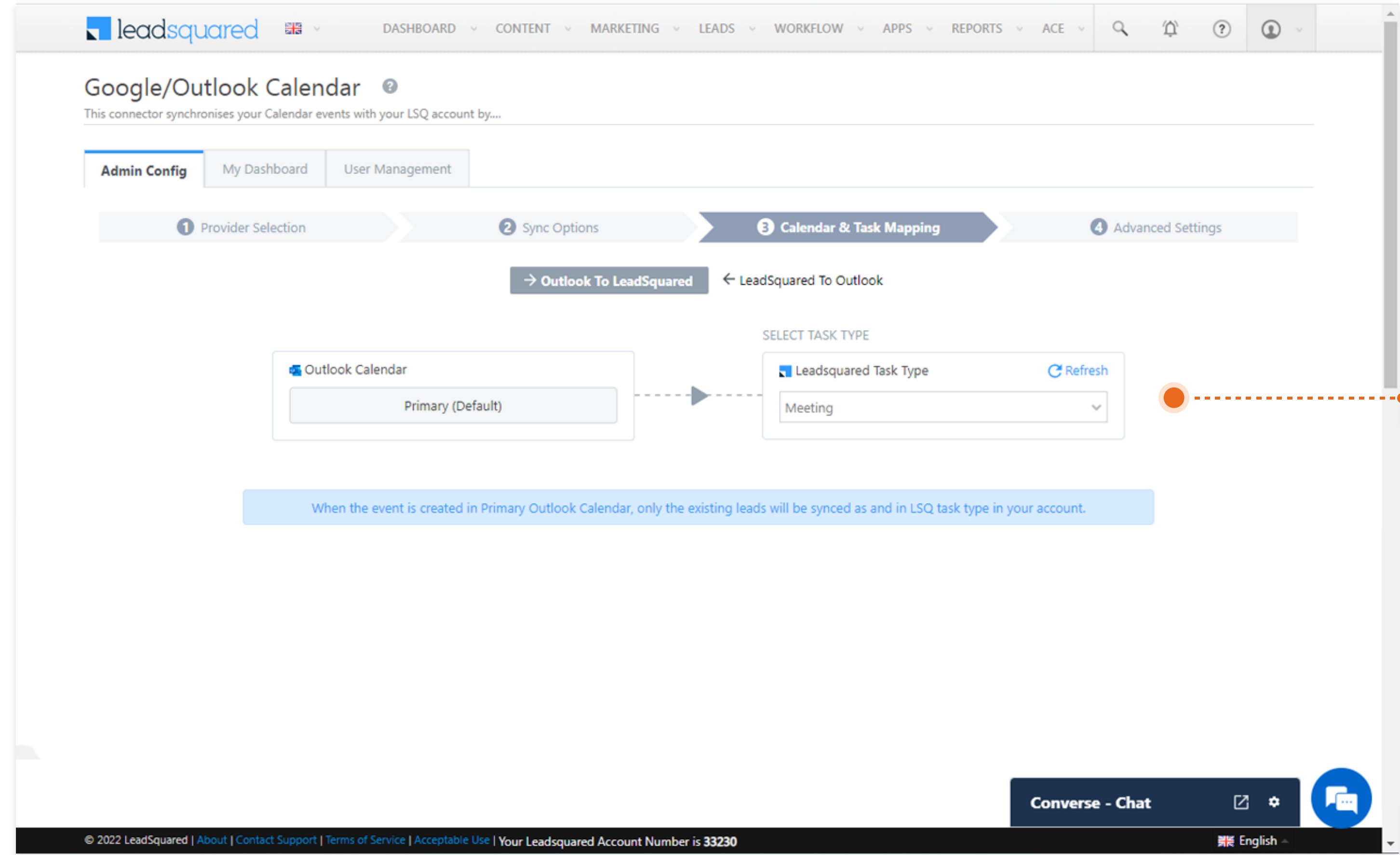
Admin can select using the drop down on the type of task to assign to the calendar sync

They have the option to configure for both mail to Leadsquared as well as Leadsquared to mail.
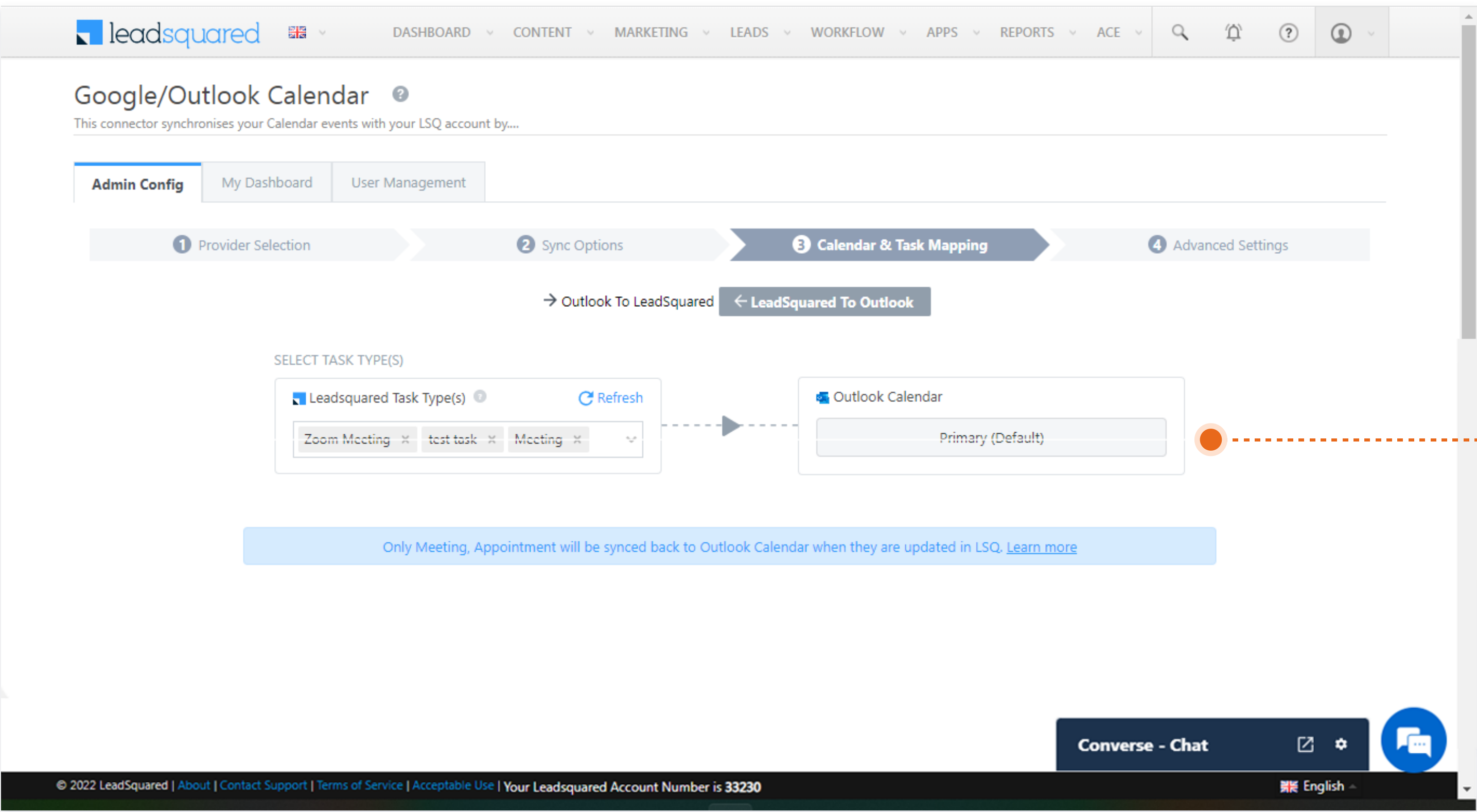
Once the event details are added, users willbe able to view list of Calendars

Step 4 : Advanced Settings

After configuring the calendar and sync mapping the admin will have the option to **update advanced** settings where they can set up Organisation domain, internal meeting sync, online scheduling, etc.
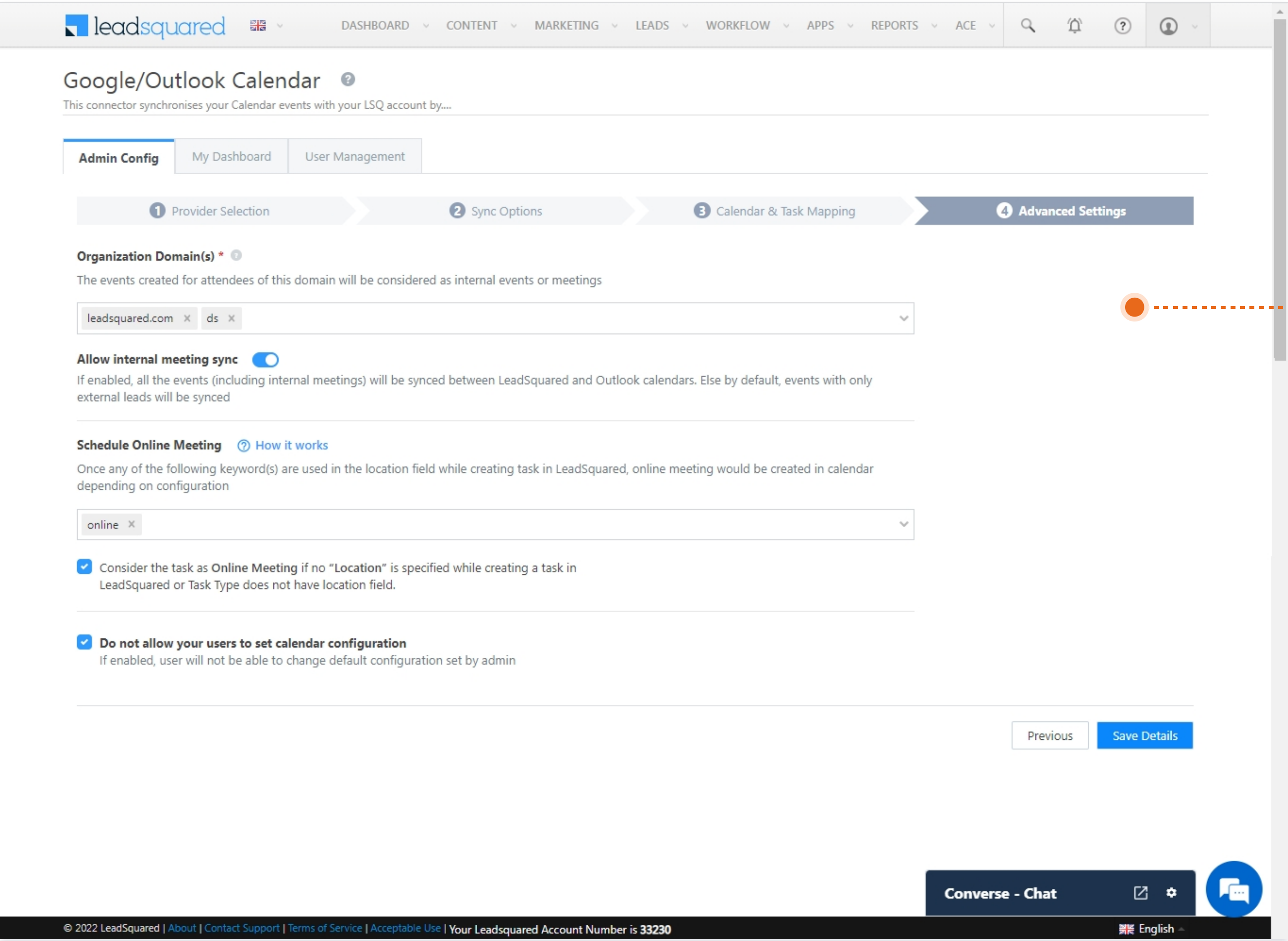
Admin can search what ever they want to Add on the dropdown as well as fill in their Own custom requirements.

## Step 5 : Completion of Configuration

Post clicking **Save Details** of the configuration the below screen will be displayed showing a success message for completion of configuration. From here the Admin can view their **Dashboard** as per the configuration they have made.
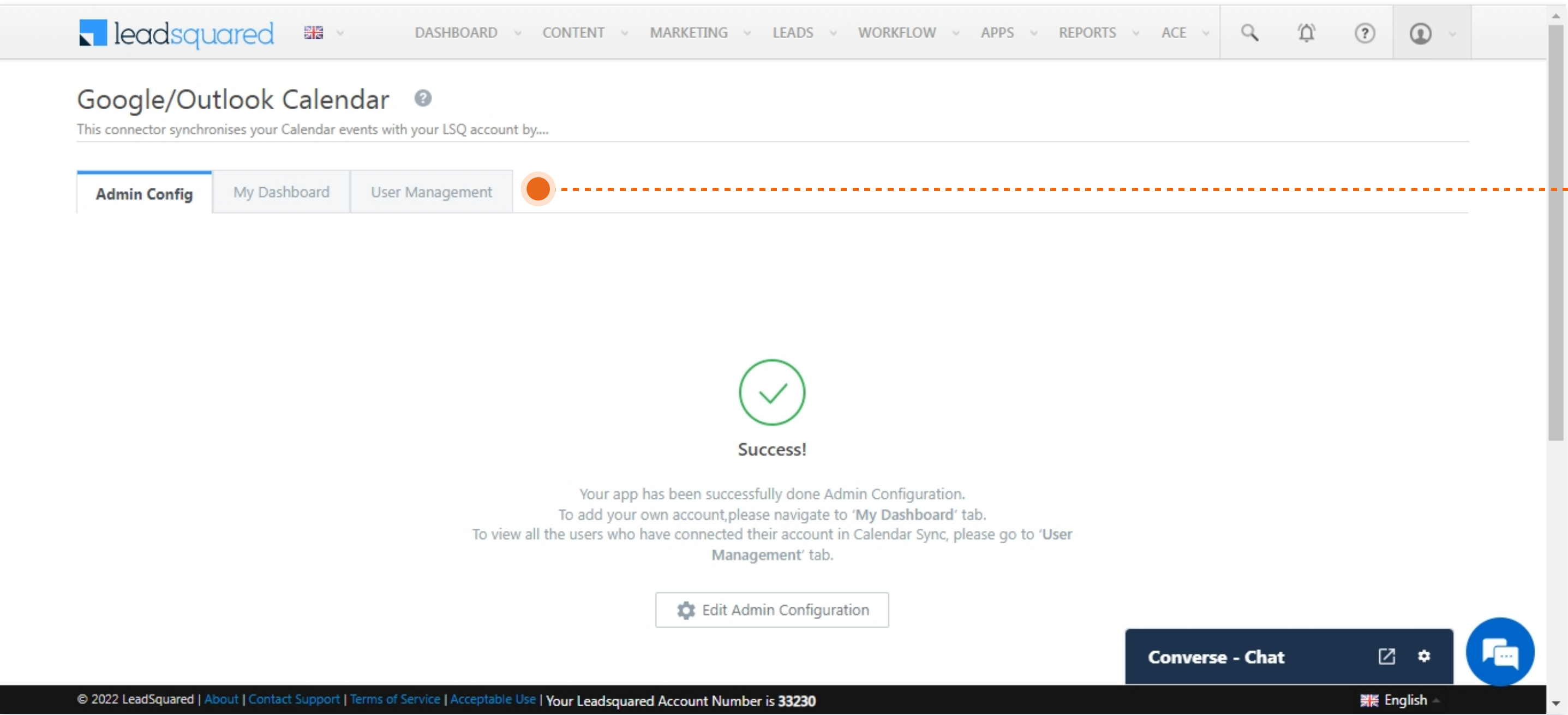
Clicking on the tabs "My Dashboard" and "User management" will show information based the configurations made by the admin on their account

Step 6 : My Dashboard

The admin can access all the information of the calendar sync as well as make any changes in the settings if needed.
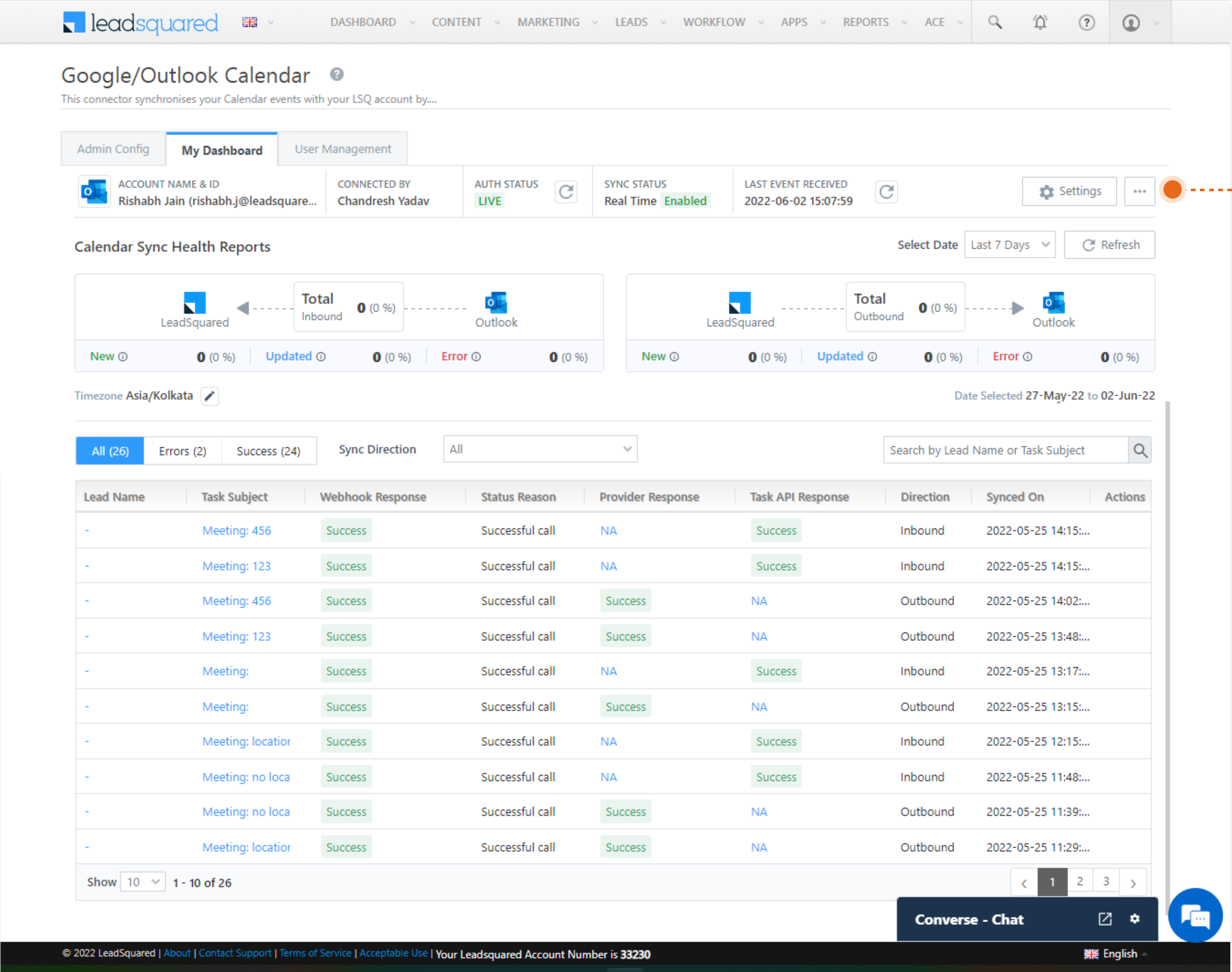
The settings button will take the admin back to the configuration process to make further changes if needed

Step 7 : User Management

The User management tab next to My Dashboard helps the admin view details of all users that are using the Calendar Sync. They will also Be able to view dashboard and logs of the users
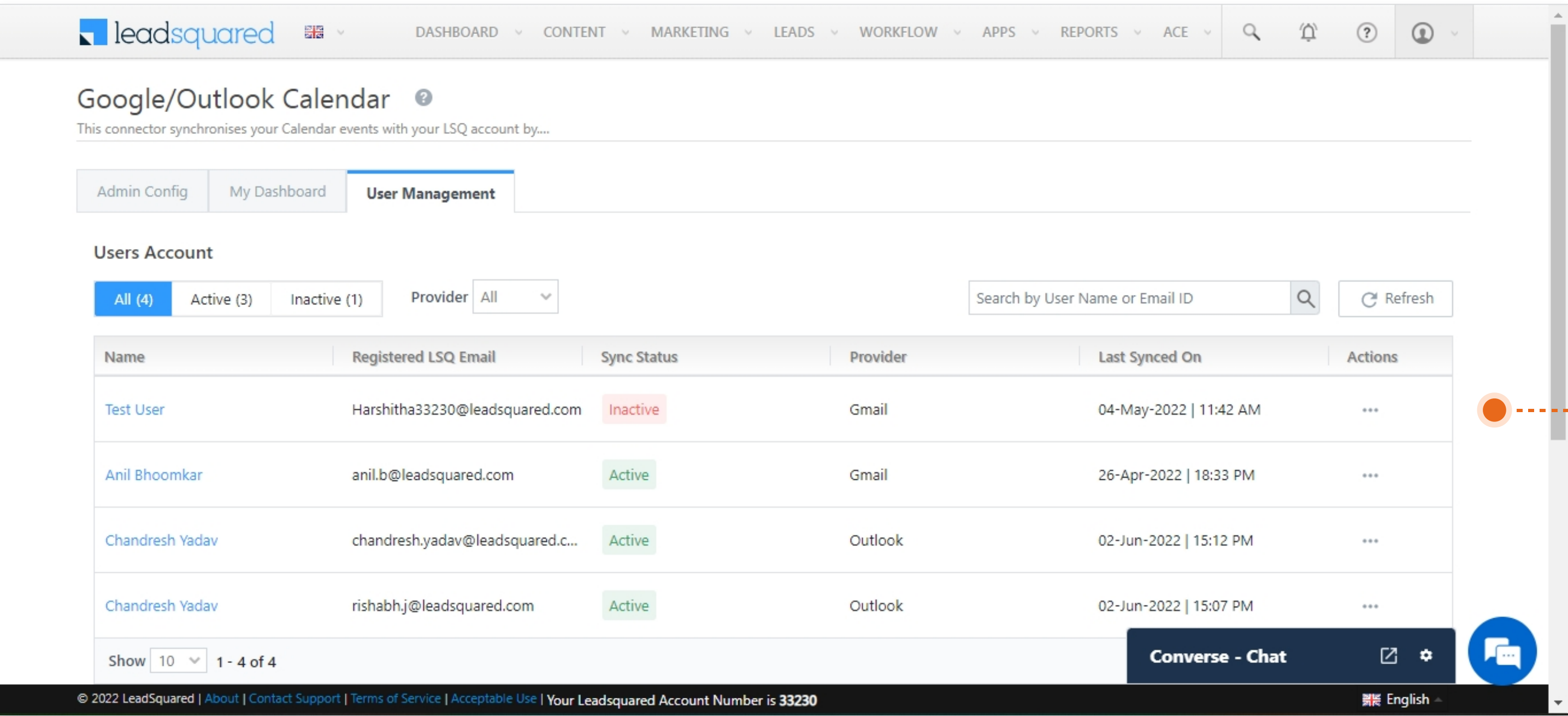

The actions column allows the admin to either disable or delete the user if necessary

USER SECTION

Step 1 : Calendar Sync Connector - Landing Page

The User starts the process of configuring the calendar sync connector from this landing page. The "**Get Started**" button is from where the User can start the configuration process for both their own account as well as for the other users.
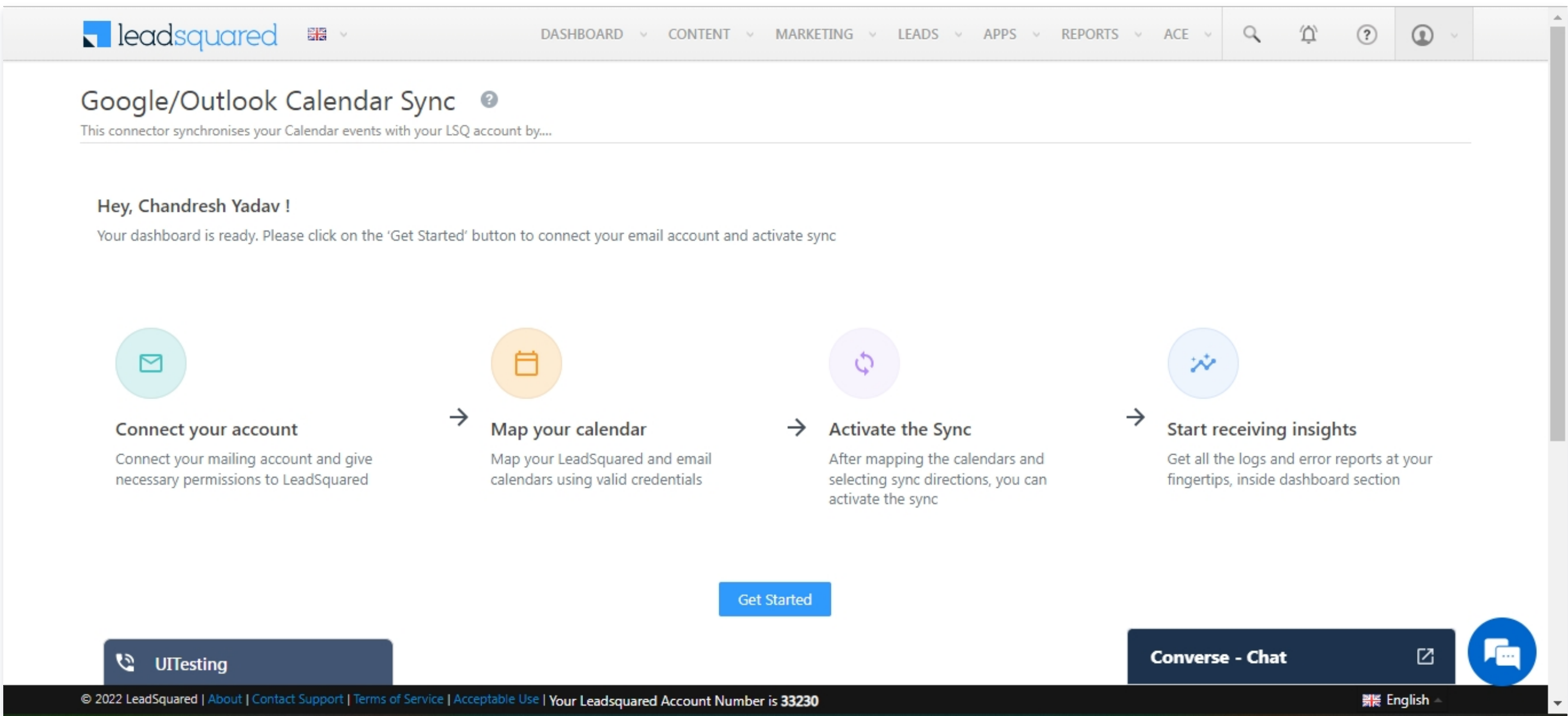
Step 2 : User Configuration for Calendar Sync Connector

User needs to configure which mail account is to be connected to the calendar sync. They can select either **Gmail - Google** or **Outlook - Microsoft** to be their primary email provider to initiate the calendar sync.
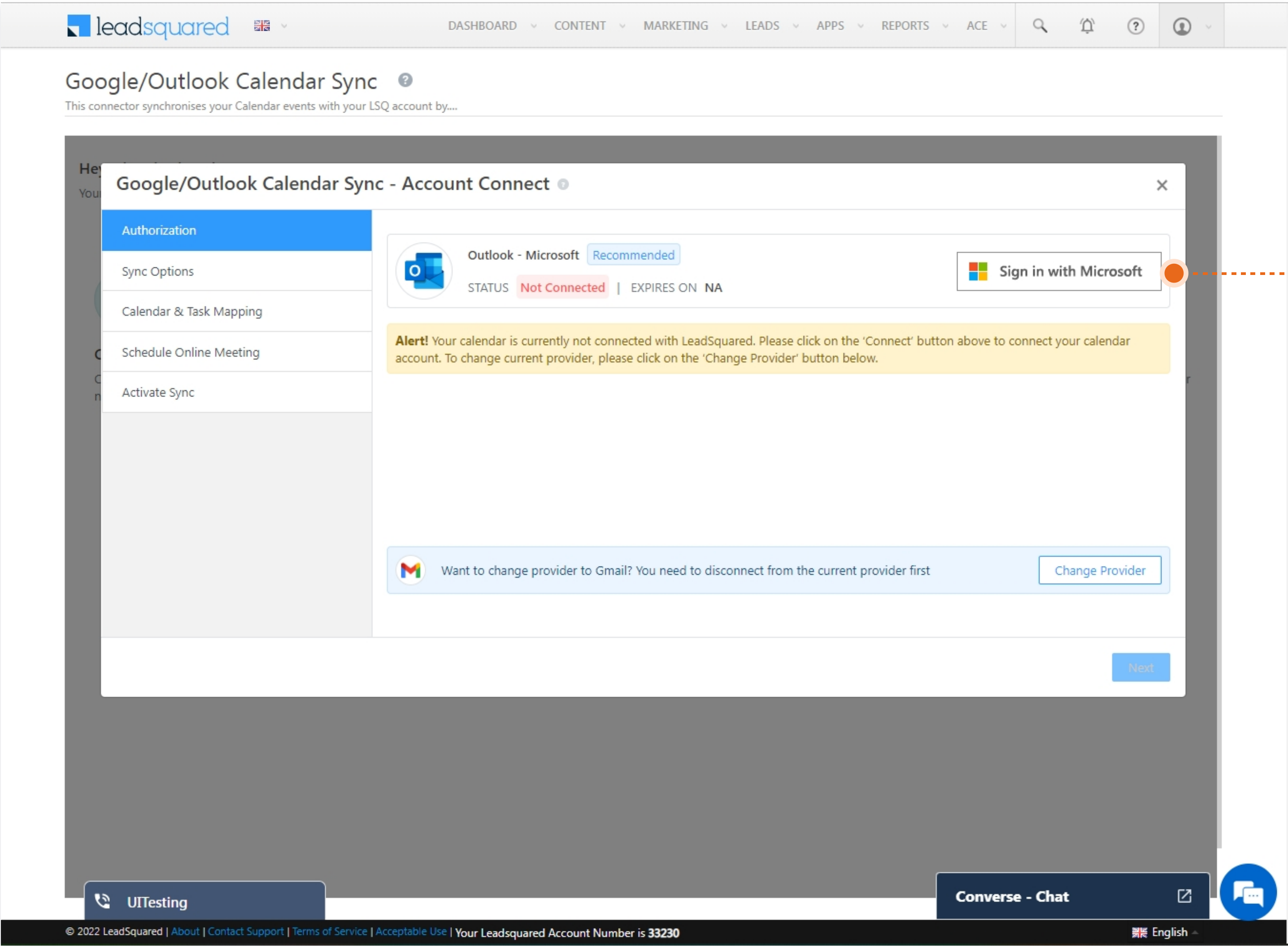
User can Sign into their Microsoft / Gmail account here

Once the email provider is selected and the user has logged into their account they can then begin the **Sync options**.
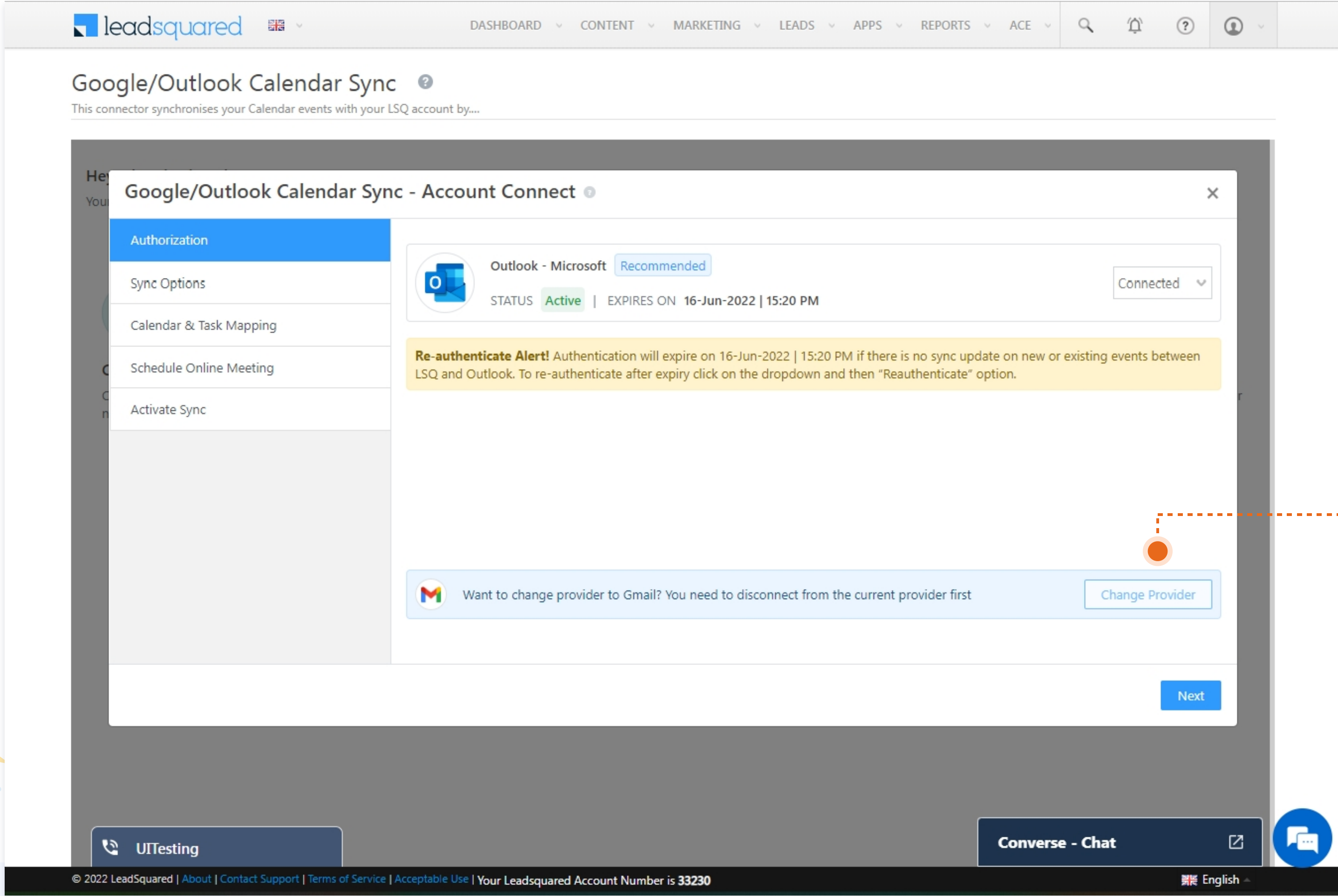
Once the user has logged in to their specific email they will not be allowed to change the provider

Step 3 : Sync Options

Once the email provider is selected the admin clicks the next button where they can configure the **Sync Options** for their selected provider.
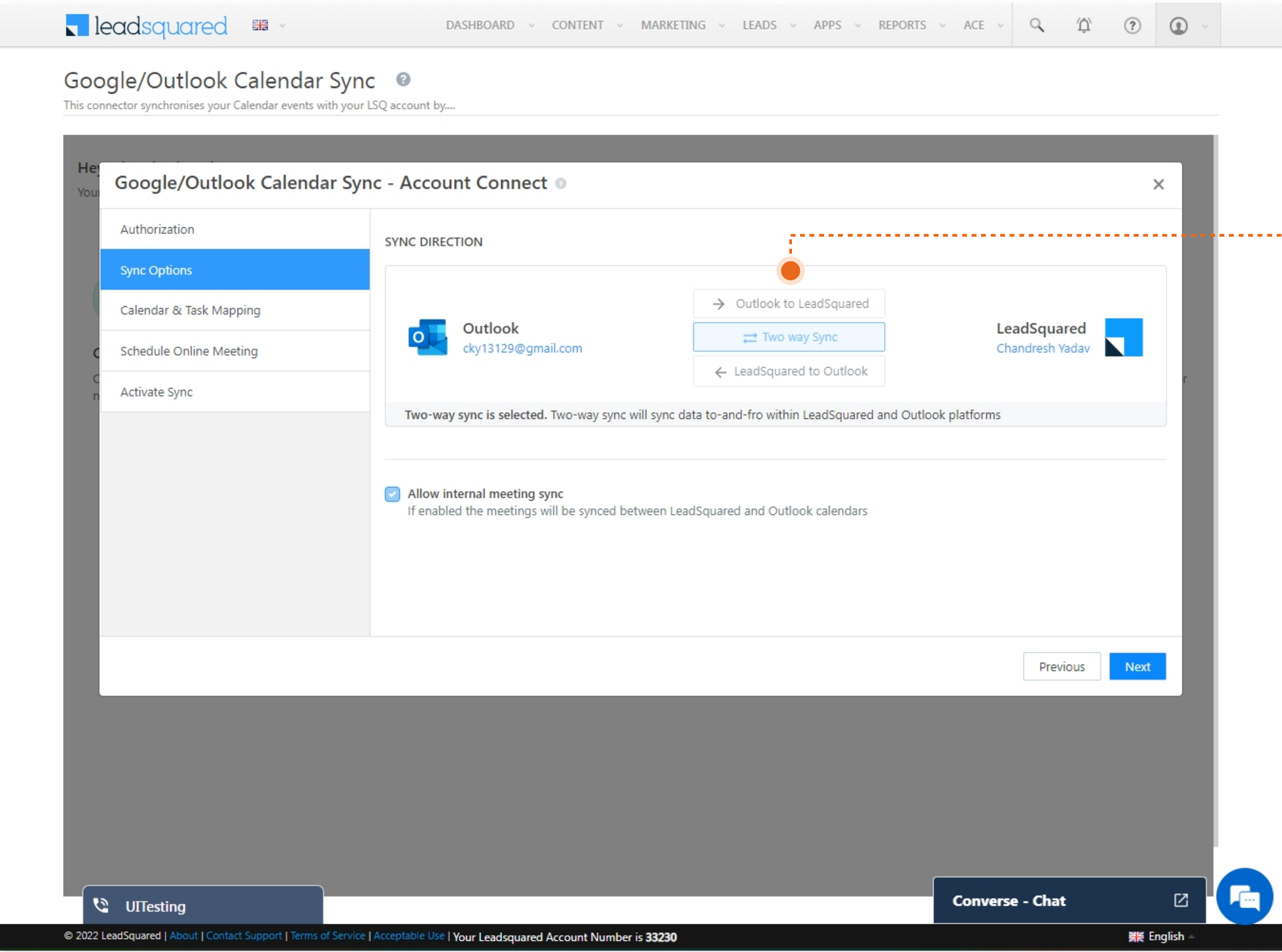
Admin can decide if they want it to function as a two way sync or only in a specific direction of sync.

Step 4 : Calendar and Task Mapping

Post completion of the configuring the sync options the user need to set up **Calendar** and **Task Mapping**. Here the admin user can set up the specific task type to work as per the email provider chosen.
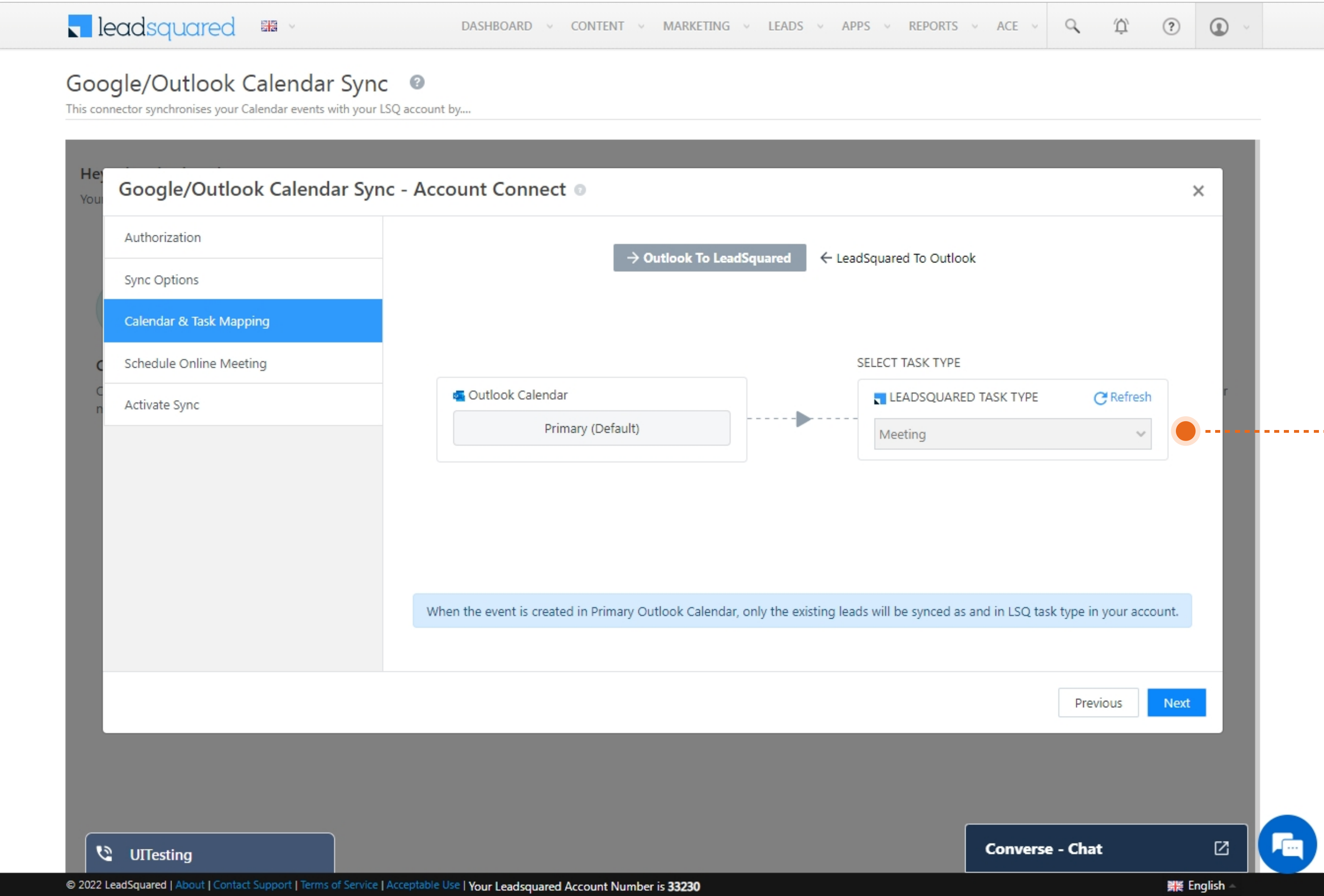
User cannot select using the dropdown on the type of task as admin has disabled it

Step 5 : Schedule Online Meeting

Users can sync and **schedule** their meetings as per the keywords they have entered as per their own requirements. They also can enable the option to consider a task as an online meeting incase there is no location specified.
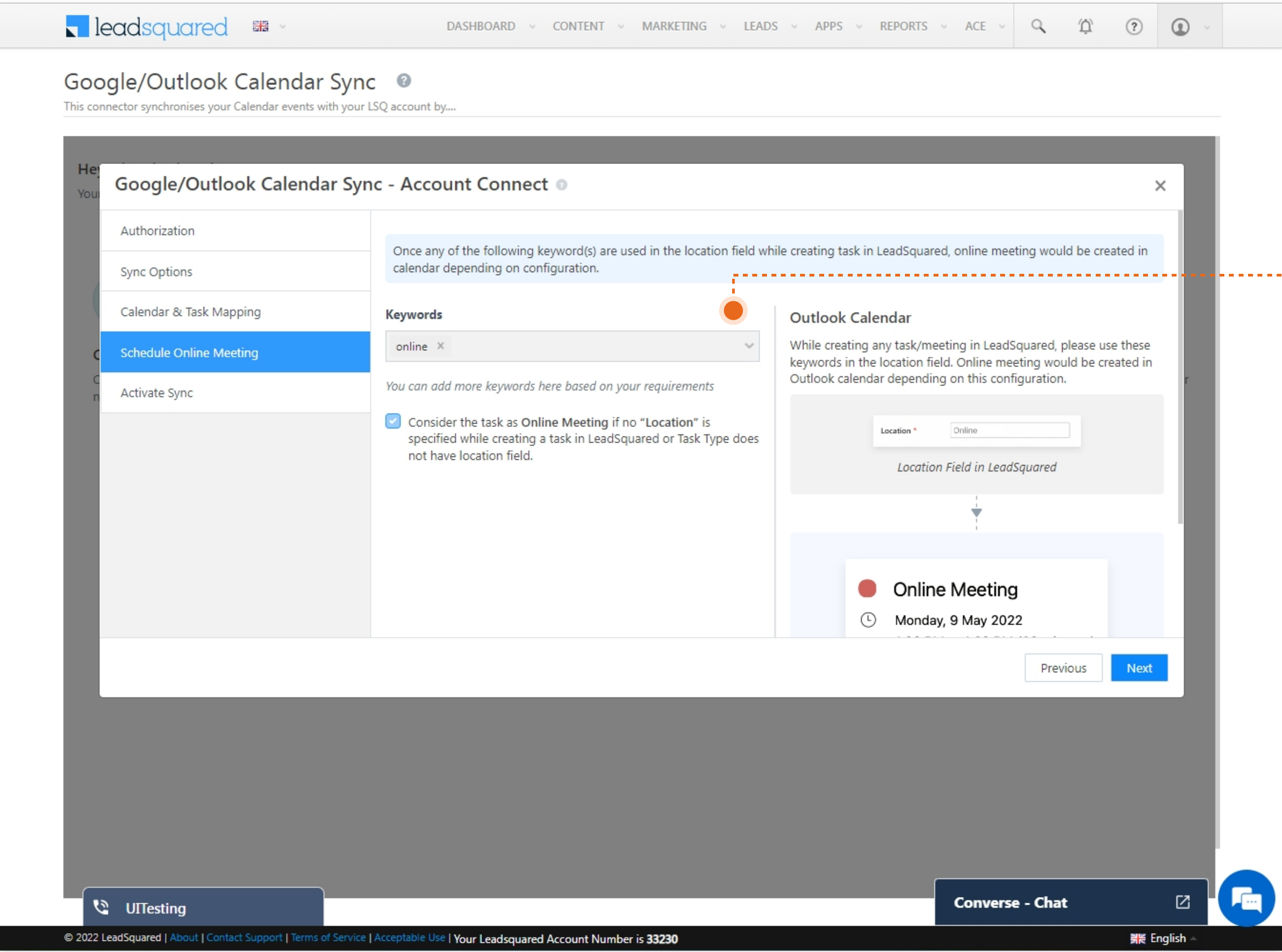
Users can add keywords based on their own requirements for meetings and tasks

Step 6 : Activate Sync

Once the user has completed syncing and scheduling their online meetings they have two options. One is to save and close and the other us to activate sync before saving. This screen shows that the setup was successful and the activation is the final step.
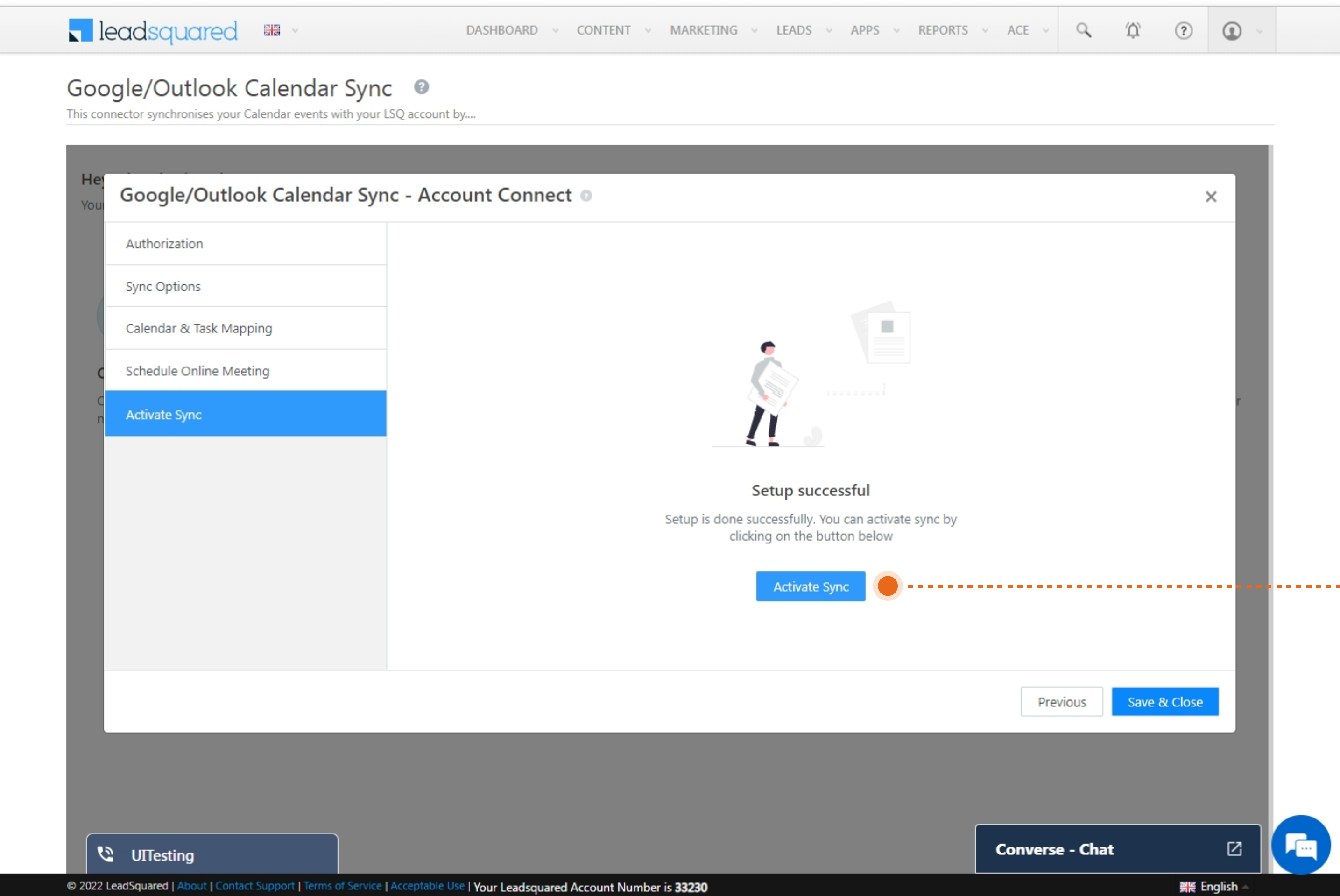
User can activate the sync they have configured for their Calendar Sync Connector

Step 7 : My Dashboard

The users can access all the information of the calendar sync as well as make any changes in the settings if needed. They can analyse each logs for leads and tasks to get Webhook response & Task API response

The settings button will take the admin back to the configuration process to make further changes if needed

For a detailed documentation about the product, please visit : https://help.leadsquared.com/google-outlook-calendar-sync-connector

Need help? Get in touch with LeadSquared's support. Mail us at sales@leadsquared.com