QUICK REFERENCE - GOOGLE SYNC

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KEY POINTS!

- **REQUIRED VERSION!** Spectra 2014 Vol 1 Release 10 (or later) or a current myStratus subscription.
- **SYNCS ARE USER-SPECIFIC!** ONE user schedule will sync with ONE Google calendar.
- Calendar items created in Google sync back to the software as **UNLINKED APPOINTMENTS**. Convert to sessions and link to clients.

TIPS

- Modify your session and appointment to **include the client's phone number on the calendar description**, giving you a simple way to contact your client on-the-go!
- **Gmail accounts are FREE!** Create one (or more) to test your sync setup until you feel comfortable.
- Start over by simply **deleting your Google calendar(s)** under settings on your Google calendar screen. Click HERE to read the Google help article.
- Another way to access your calendar *(as opposed to syncing it with your mobile device)* is to simply log in to your Gmail account using your **web browser**. The myStratus Mobile app also provides access for myStratus users.

RESOURCES

HELP TOPICS:
- Setting up Google Sync
- Gmail Contacts
- Setting up Email
- Control Center
- Converting Appointments to Sessions

VIDEO TUTORIAL:
- 2-201: Syncing with Google

GOOGLE SETUP CHECKLIST

☐ **1 - CREATE FREE GMAIL ACCOUNT(S).** The Google sync feature requires a Gmail account for each user that will be syncing their schedule. These accounts are free and available at http://www.gmail.com.

☐ **2 - ESTABLISH SUCCESSFUL SYNCING BETWEEN YOUR MOBILE DEVICE(S) AND GOOGLE.** We make sure Spectra/myStratus syncs with Google. It is **up to you** to make sure your mobile device(s) sync successfully with Google. Many mobile devices come with a pre-installed app. For those that don't, check for an app on Google or through your mobile device manufacturer.

☐ **3 - CREATE CLIENT SYNC GROUP(S) IN SPECTRA/MYSTRATUS.** Whether you choose to sync clients or not, we recommend setting up a client group that will be available specifically for this purpose. Create a group called "Google Sync" (or similar) in **Maintenance > Client > Client Groups**. *NOTE: Because the sync feature is set up at the **user level**, you may eventually want to create more than one client sync group (i.e., one for Bill, another for Lisa, etc.).*

☐ **4 - ADD CLIENTS TO THE SYNC GROUP(S) IN SPECTRA/MYSTRATUS. (optional)** If you want to sync clients with Google, you'll need to add the appropriate clients to your sync group(s) in Spectra/myStratus. We recommend limiting your sync groups to small subsets of your client database for several reasons, including sync time and security issues. Go to **Tools > Add Clients to a Group** and add clients using a filter or from another group. You can also hand-select clients for your sync group.

☐ **5 - SET UP GOOGLE SYNC PREFERENCES IN SPECTRA/MYSTRATUS.** The Google sync preferences are located in **Maintenance > Preferences > User Preferences**. On the **Google** tab, set up the following:

Turn on Google sync for THIS user. Items sync OUT to Google. Authenticate account and choose the appropriate Google calendar.

First time ONLY! Will be de-selected automatically. Populates calendar items and client sync group (below).

Select items you want to sync BACK from Google to Spectra/myStratus - calendar items and/or contacts.

Check first box to receive notice of warnings & errors. Only check second box if troubleshooting a specific issue.

Use group created in Step 3 – general or specific to this USER. Ok if group is empty.

☐ **6 - SET UP EMAIL IN SPECTRA/MYSTRATUS.** To receive any warnings and errors regarding Google sync issues, email must be set up in Spectra/myStratus. Go to the **email** tab in **Maintenance > Preferences > Company Preferences**. For more information, read the Setting up Email topic in the online help.

☐ **7 - ENABLE THE GOOGLE SYNC JOB IN THE CONTROL CENTER [Spectra ONLY]**. This job controls the sync process for all users that are using the Google sync feature, even when they are not logged into the software. Go to **Utilities > Control Center** and open the **Google Sync Processor** job. Enable the job, set the schedule, and choose the computer that should run the job. *Note: The computer you choose to run this job must remain on AND have an Internet connection in order for the job to run.* When finished, restart your computer.