

SPECTRA QUICK REFERENCE - GOOGLE SYNC

KEY POINTS!

- **SYNCING** is automatic—every 10 minutes.
- **SYNCS ARE USER-SPECIFIC!** ONE Spectra user calendar will sync with ONE Google calendar.
- Calendar items created in Google sync back to Spectra as **UNLINKED APPOINTMENTS**. Re-create as sessions in Spectra as necessary.

TIPS

- Modify your session and appointment types in Spectra to **include the client's phone number on the calendar description**, giving you a simple way to contact your client when 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.
- An **alternative method** of accessing your calendar (as opposed to syncing it with your mobile device) is to log into your GMail account using your **web browser**.

RESOURCES

HELP TOPICS:

- [Mobile Devices & Spectra](#)
- [Google Syncing](#)
- [Setting up Email in Spectra](#)

VIDEO TUTORIAL:

- [2-201: Smartphone Syncing through Google](#)

GOOGLE SETUP CHECKLIST

- 1 - **CREATE FREE GMAIL ACCOUNT(S)**. The Spectra Google sync requires a GMail account for each user that will be using the sync feature. These accounts are free and available at <http://www.gmail.com>.
- 2 - **ESTABLISH SUCCESSFUL SYNCING BETWEEN YOUR MOBILE DEVICE(S) AND GOOGLE**. Spectra will sync 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 available apps through Google and/or your mobile device manufacturer.
- 3 - **CREATE CLIENT SYNC GROUP(S) IN SPECTRA**. Whether you choose to sync clients or not, it is recommended that you set up a client group that will be available specifically for this purpose. Create a group called "Google Sync" (or similar) in **Maintenance > List Maintenance > Client > Client Groups**. *NOTE: Because the sync feature is set up at the user level, you may find that eventually you will want 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. (optional)** If you want to sync clients with Google, you will need to add the appropriate clients to the sync group(s). It is recommended that client sync groups are small sub-sets of your client database for several reasons, including sync time, and security issues. Go to **Tools > Add Clients to a Group** and add clients by using a filter or by adding clients from another existing group. You may also choose to hand-select clients to put into your sync group.
- 5 - **SET UP GOOGLE SYNC PREFERENCES IN SPECTRA**. The Google sync preferences are located in **Maintenance > Preferences > User Preferences**. On the **Google** tab, set up the following:

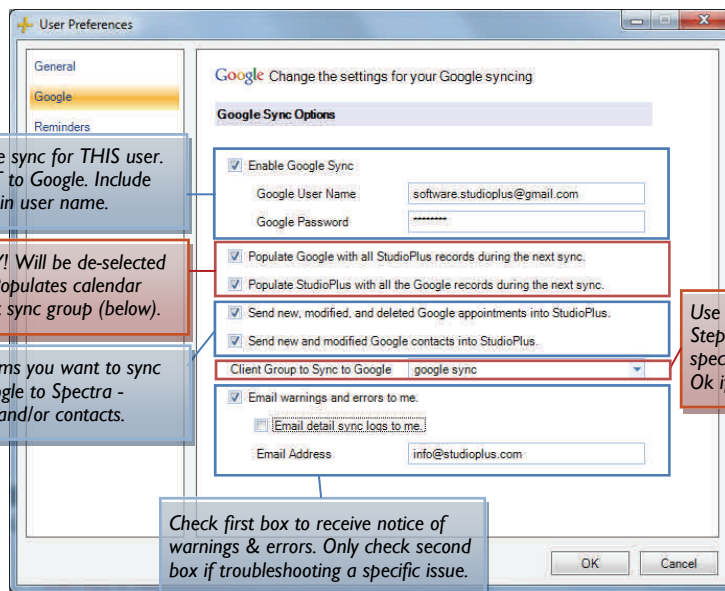
Turns on Google sync for THIS user. Items sync OUT to Google. Include "@gmail.com" in user name.

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

Select which items you want to sync BACK from Google to Spectra - 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**. In order to receive warning and error emails regarding Google syncing, email will need to be set up on EACH workstation that runs Spectra. Go to the **email** tab in **Maintenance > Preferences > Workstation Preferences**. For more information, read the "Setting up Email" topic in the user guide.