![TopBuilder]

Now your Calendar & Emails are connected to TopBuilder!

You have full access to send promotional emails, informative newsletters, individual emails, notifications, quotes, calendar invitations, and more with your Outlook account using TopBuilder.

You are not limited to one account, you can connect other Outlook, Gmail, and Apple Mail accounts in addition to this connected account. If you have any questions about this connection, please contact our support team.

Congratulations!

You have successfully connected TopBuilder to your Outlook account.

HOW-TO GUIDE

EMAIL & CALENDAR INTEGRATION

Here is a complete how-to guide to connecting your email and calendar systems to TopBuilder.

Email & Calendar Integration

Table of Contents

Email & Calendar Integration

What is it?

You can now connect your email and calendar accounts to the TopBuilder CRM. This includes your Outlook, Google, and iCloud accounts.

The best part: it will be available to all existing customers at no extra cost.

What is it?

Email Connection

The Email Connection means emails can be sent from your personal email.
In other words, emails no longer have to be sent from TopBuilder "on behalf of"
your company.

The Email Integration can be used for:

- Email Campaigns

- Newsletter Campaigns

- Individual Emails

- Follow-Up and Automated Emails

- Sending Quotes, Pricing, and Proposals

- Internal Emails (Reminders & Alerts)

What is it?

Calendar Connection

The Calendar Connection means calendar notifications can be sent directly to your calendar. In other words, due dates, appointments, and reminders can be added to your calendar from TopBuilder.

The calendar Integration can be used for:

- Task Due Dates

- Bid Due Dates

- Client Appointments

- Newsletter & Email Reminders

- Estimator Assignments

- Project Manager Assignments

- Crew Assignments

Important Note:

We are launching the Email & Calendar Integration in phases. Right now, we do not have the ability to show calendar availability within TopBuilder. We are planning on having the capability to view calendar availability in Phase Two. Phase Two is scheduled to be completed within the next 30 days.
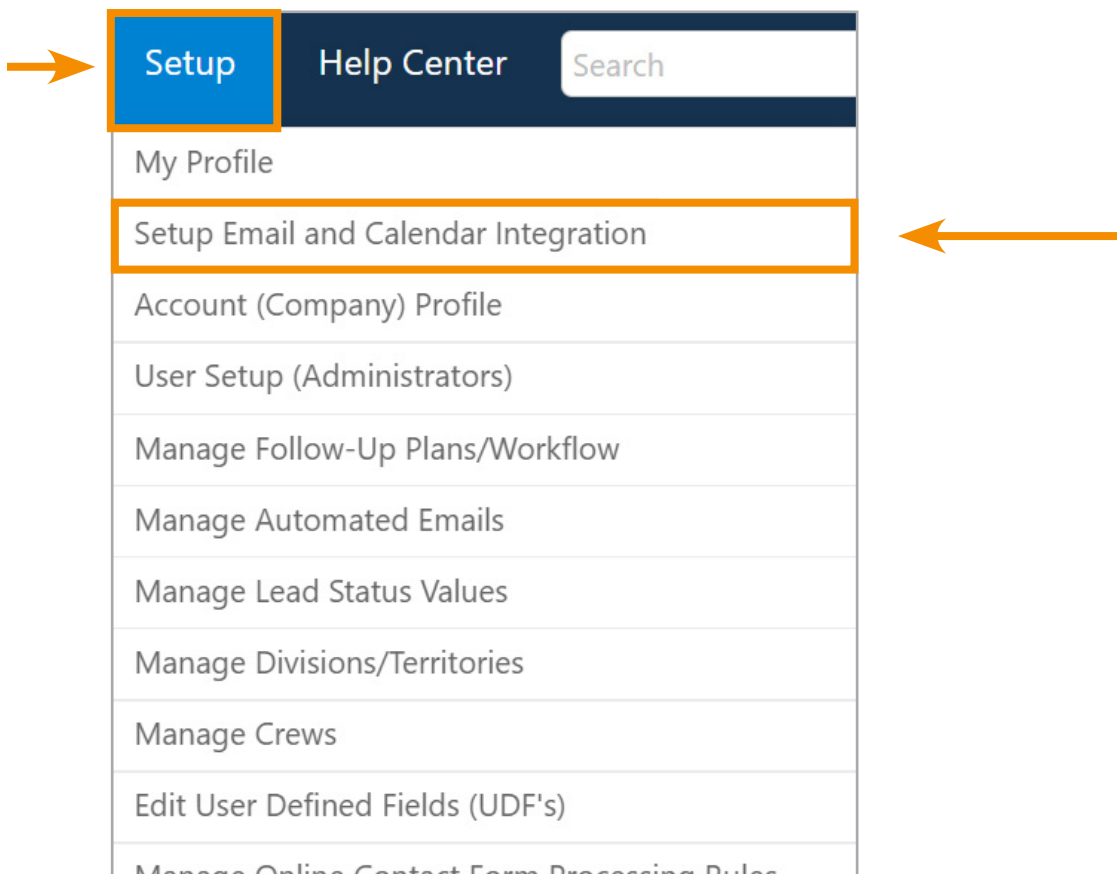
Getting Started

Step One

First, you need to register your Outlook, Google, or iCloud account with TopBuilder. This step will require you to input your email and password credentials to create the connection.

Step 1.1 - Go to the **Setup** Menu; click **Setup Email and Calendar Integration**

Getting Started

Step One

Step 1.2 - From the list of registered accounts, click **Register a New Account**

My Accounts (Outlook, Gmail, iCloud, Other)											Register a New Account	Grid Settings
Email	Name (Alias)	Created By	Shared	Campaigns	Newsletters	Auto Emails	Individual Emails	Quotes/Prop	Internal Emails	Use for Calendar Appts.		Actions
davek@topbuildersolutions.com	Dave TopBuilder	Dave Knowles	☐	☑	☑	☑	☑	☑	☑	☑		Edit
davewknowles@gmail.com	default	Dave Knowles	☐	☑	☑	☑	☑	☑	☑	☐		Edit

Step 1.3 - Enter your **email address,** click **Register Email Account**

Register a New Account   ✕

Enter your Outlook, Gmail or iCloud email address and click Register Email Account. You will then be taken to a page that will ask you for your account password.

Email:
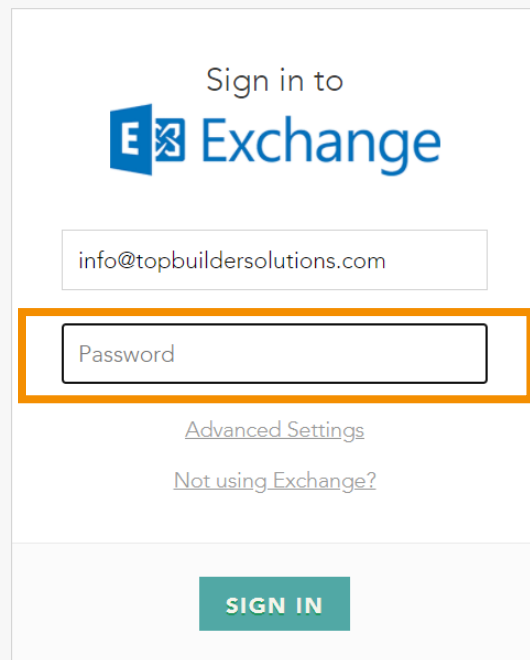
myaccount@mycompany.com

Register Email Account

Getting Started

Step One

Step 1.4 - Enter your Outlook, Gmail, or other **account password**

(TopBuilder auto-detects the account type from the email address you enter)

Please sign into your account using your normal password for the email address you wish to register with TopBuilder.
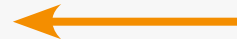
Sign in to

E **Exchange**

info@topbuildersolutions.com

Password

Advanced Settings

Not using Exchange?

SIGN IN

Getting Started

Step Two

Once connected, you'll select your **account preferences**.

Additionally, you will **select which calendar** you wish to connect.

(You may have multiple Outlook calendars; make sure you select the correct one.)

Account Preference - Below is a quick explanation of each account preference.
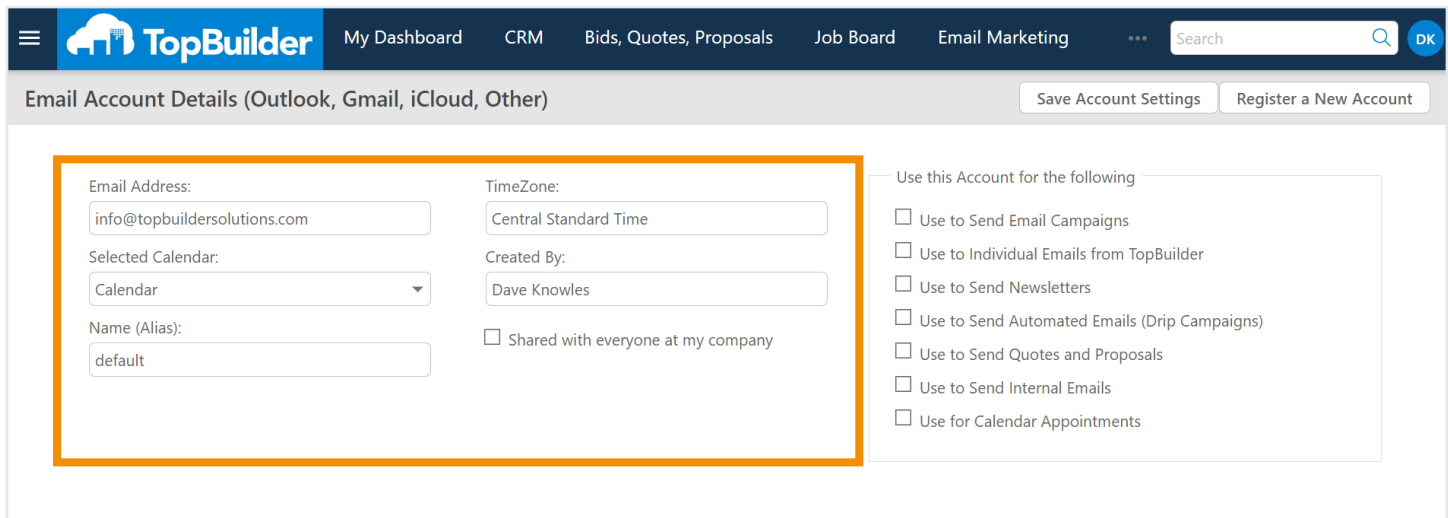
- **Shared** - This is used for shared email accounts. Only check this box if you want other TopBuilder users in your company to have the option to send emails from that email account.

- **Campaigns** - This refers to any email sent using TopBuilder's Email Marketing tools. Once checked, you can send promotional emails from that email account.

- **Newsletters** - This refers to any email sent using TopBuilder's Newsletter tools. Once checked, you can send newsletters from that email account.

- **Auto Emails** – This refers to any auto reply, alerts, and notifications. Once checked, you can setup auto replies, alerts, and notifications to be sent from that email account.

- **Individual Emails** – This refers to an email sent through TopBuilder. Once checked, you can send individual emails from TopBuilder that will be sent through your email provider.

- **Quotes/Proposals** – This refers to any email used to send quotes, pricing, or proposals. Once checked, you can send quotes, pricing, and proposals from that email account.

- **Internal Emails** – This refers to any internal message used to send tasks. Once checked, you can send task alerts from that email account.

- **Use for Calendar Appts.** – This refers to automated appointments being added to your calendar. Once checked, calendar notifications will automatically be added to that calendar.
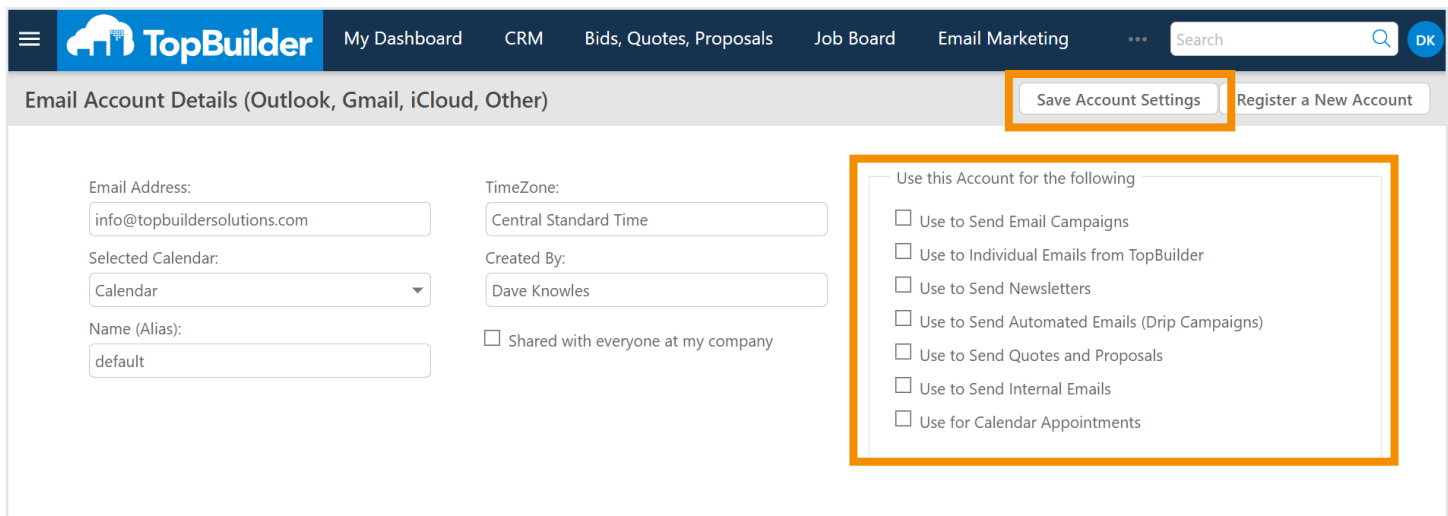
Getting Started

Step Two

Step 2.1 - Complete each field

Step 2.2 - Check each desired account preference box. (Click Save Account Setting)

Getting Started

Step Three

Step 3.1 - In the top right; click **Setup** in the dark blue menu

Setup	Help Center	Search
My Profile		
Setup Email and Calendar Integration		
Account (Company) Profile		
User Setup (Administrators)		
Manage Follow-Up Plans/Workflow		
Manage Automated Emails		
Manage Lead Status Values		
Manage Divisions/Territories		
Manage Crews		
Edit User Defined Fields (UDF's)		
Manage Online Contact Form Processing Rules		
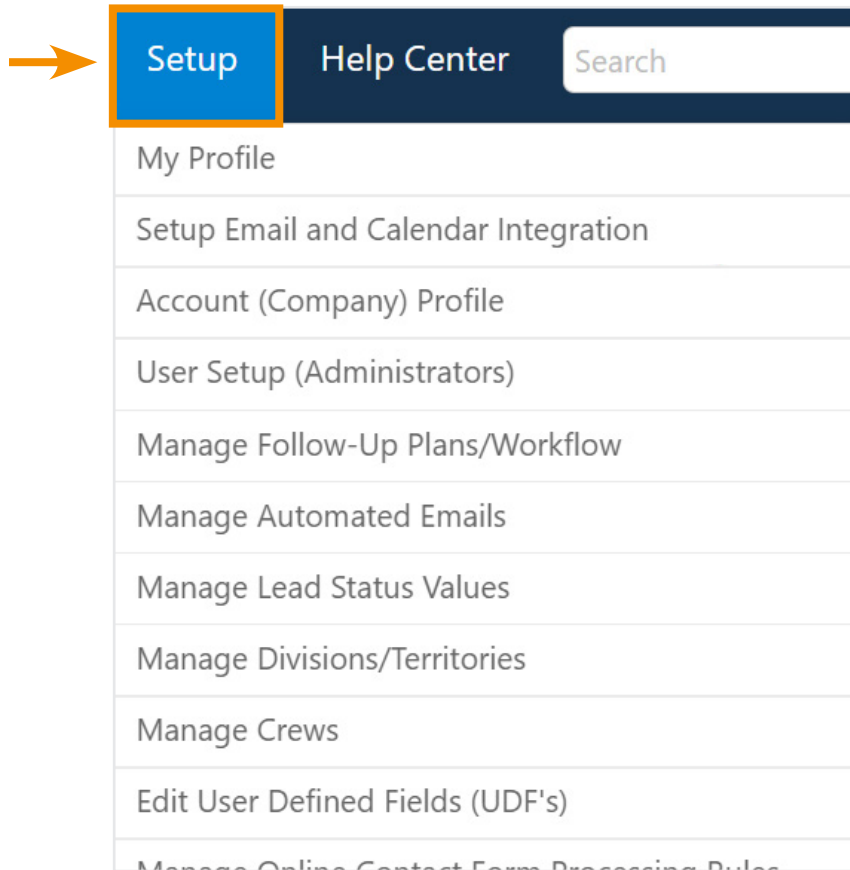
Step 3.2 - Once there, click on **My Profile**

Setup	Help Center	Search
My Profile		
Setup Email and Calendar Integration		
Account (Company) Profile		
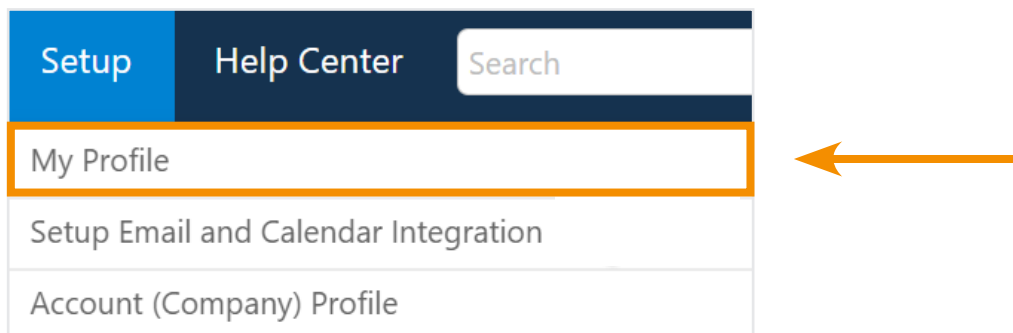
Getting Started

Step Three

Step 3.3 - Once there, **set your profile preferences** and configure the items you wish to include on your calendar and which ones to ignore.

Edit My Profile

User Name:	dknowles
First Name:	Dave *
Last Name:	Knowles *
Abbreviated Name:	DaveK * (Example: your initials)
Email Address:	davek@topbuildersolutions.com *
Mobile Phone:	(Required to receive text alerts)
Wireless Carrier:	(Required to receive text alerts)

☑ Share my information? (by default). ⓘ

Alert Preferences

Task Reminders	☑ Email	☑ Text
Task Past Due	☑ Email	☑ Text
Newsletter Reminder (1 day prior)	☑ Email	☑ Text
Newsletter Sent	☑ Email	☑ Text
Birthday/Anniversary Alerts	☑ Email	☑ Text
Website Tracking (New Visit Alerts)	☑ Email	☑ Text

Calendar Preferences

☑ Add Tasks to my calendar
☑ Add Bid Due Dates to my Calendar (when I'm Assigned to the Lead)
☑ Add Project Manager Assignments to My Calendar
☑ Add Estimator Assignments to My Calendar
☑ Add Crew Assignments to my Calendar (when I am Assigned to the Crew)
☐ Add Newsletter Distribution Dates to My Calendar

[Save] [Change Password] [Edit Signature]

Getting Started

Step Four

Step 4.1 - Next, register any additional shared accounts. For example, you may want to send promotional emails from info@example.com or quotes from billing@example.com.

(Repeat step 1 and 2)

Getting Started

Final Step

You are now connected!

Task Reminders will now automatically appear on your calendar. Additionally, emails sent from authorized email accounts will be sent from your personal/work email.

You will know the connection is working because you will see the emails in your Sent folder.

Final Notes

Frequently Asked Questions

1. Does the email appear in my sent folder? **- Yes**

2. How do I connect a calendar item back to TopBuilder? **- The calendar item (and our alerts) includes a link back to the Lead (or Job) or to the Task.**

3. Can we still track opens, clicks, and unsubscribes? **- Yes**

4. Does the email show that is came from me? **- Yes**

5. Does the email show my name or the company name? **– It will match the settings created in your email account.**

6. Do I see email bounces in my inbox? **- Yes**

7. How are bounces handled? **– These are handled by the email provider. You will need to forward bounces to TopBuilder. (bounce@topbuildersolutions.net).**

8. What if I want to send an email from someone else? **- This functionality is allowed if the email account is registered with TopBuilder and the "Share" box has been checked in account preferences.**

Final Notes

Frequently Asked Questions

- **When does TopBuilder add, update, or remove items from my calendar?**

    - If "Add my Tasks to My Calendar" is checked

        - New tasks assigned to you that have a due date

        - Updates to tasks including due date changes

        - Deleted tasks

        - Reassigned tasks (if reassigned to you it will be created; if assigned to you and reassigned to someone else it will be deleted)

        - Completed tasks will be deleted from your calendar

        - Canceled tasks will be deleted from your calendar (this is rare)

    - If "Add Bid Due Dates to my Calendar" is checked (when you are Assigned to the Lead)

        - Leads Assigned to you that have a bid due date will be added to your calendar

        - Any changes in bid due dates will update your calendar

        - If the Lead is reassigned to someone else, it will be removed from your calendar

    - If "Add Project Manager Assignments to My Calendar" is checked

        - If you are assigned to a Lead and the lead has an estimated or actual start date and an estimated or actual end date, the Lead will be added to your calendar

        - Changes to the Lead job start or end dates will be reflected on your calendar

        - Changes to the Project manager assignment will remove the Lead from your calendar

    - If "Add Estimator Assignments to My Calendar" is checked

        - If you are assigned to a Lead as a primary or secondary estimator and the lead has bid due date, the Lead will be added to your calendar

        - Changes to the Lead due date be reflected on your calendar

        - Any changes to the Estimator manager assignment will remove the Lead from your calendar

- **When does TopBuilder add, update, or remove items from my calendar? (Continued)**
  - If "Add Crew Assignments to my Calendar" is checked (when you are Assigned to the Crew)
    - If you are assigned to a Crew and that Crew is assigned to a job/lead and the lead has an estimated or actual start date and an estimated or actual end date, the Lead will be added to your calendar
    - Changes to the Lead job start or end dates will be reflected on your calendar
    - Any changes to the Crew assignment will remove the Lead from your calendar
  - If "Add Newsletter Distribution Dates to My Calendar" is checked
    - Your company newsletter next distribution date/time will be included on your calendar with a 1-day reminder that the Newsletter is scheduled to be sent
    - Any changes to the scheduled distribution date of the newsletter

Conclusion

If you have any additional questions or need any additional explanations, please contact our team for assistance, we're here to help!

Phone:
(855) 806-6648

Support Email:
support@topbuildersolutions.com

Website:
www.TopBuilderSolutions.com

TopBuilder

Thanks for reading!