MSN

Mortgage Support Network

Big enough to look after you, but small enough to care.

Mortgage Support Network: 360 Lifecycle Diary Integration Guide

How to set up your 360 Lifecycle diary integration

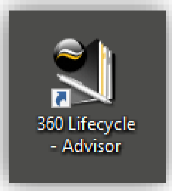
The 360 Lifecycle diary can integrate with a number of external calendars. This is useful as it allows you to add appointments, meetings, etc into your own diary and have them copy over into your 360 Advisor calendar.

Known compatible diaries are:

- Outlook 2007 & 2010
- Outlook Web Access
- Gmail
- iPhone & iPad
- Windows Phone
- Yahoo Mail

NB: Diary integration may work with other alternative email diaries but this cannot be guaranteed. Also, when integrating your diaries to your phone you may need to take a few more steps than listed here in this guide. If you are unable to integrate your smartphone or email in general please call the 360 Lifecycle Support Team on 0116 240 8621.

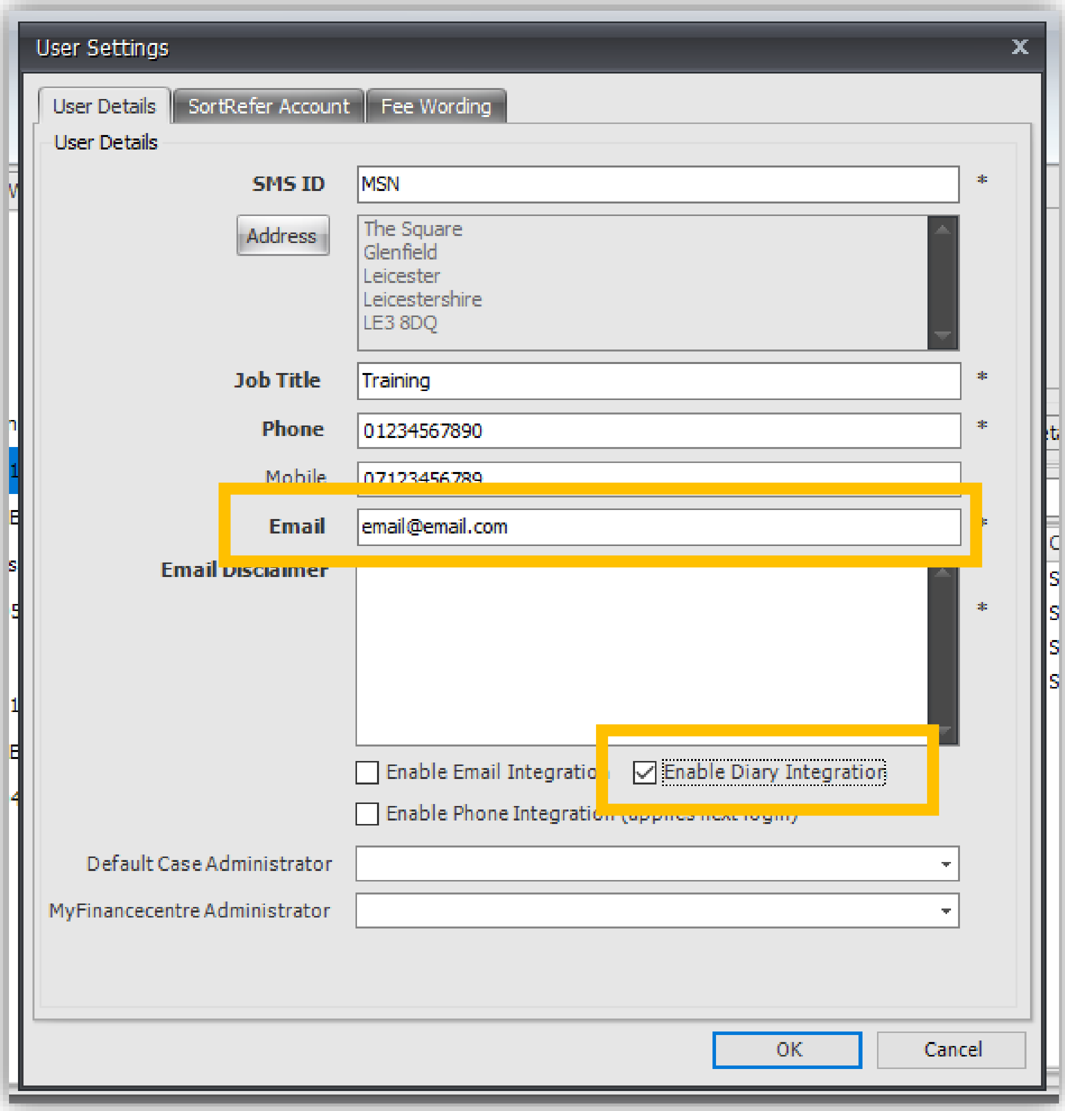
1) Start by logging into the 360 Lifecycle Advisor system. This part of the system will be located on your desktop with an icon as follows:



2) Enter your username and password (remember that your password is case sensitive):

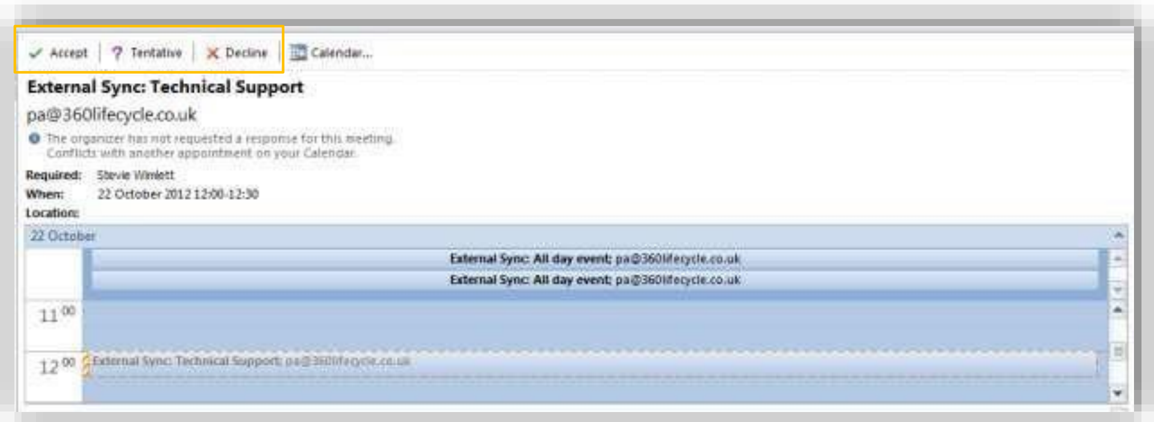
3) Click on 'User Settings' under the 'Tools' menu:

4) In the screen that appears tick the 'Enable Diary Integration' box and ensure that you have the relevant email address entered that relates to the external diary you are wishing to integrate with. Click 'Ok' to save the changes. You 360 Lifecycle Advisor diary is now integrated to your external diary.

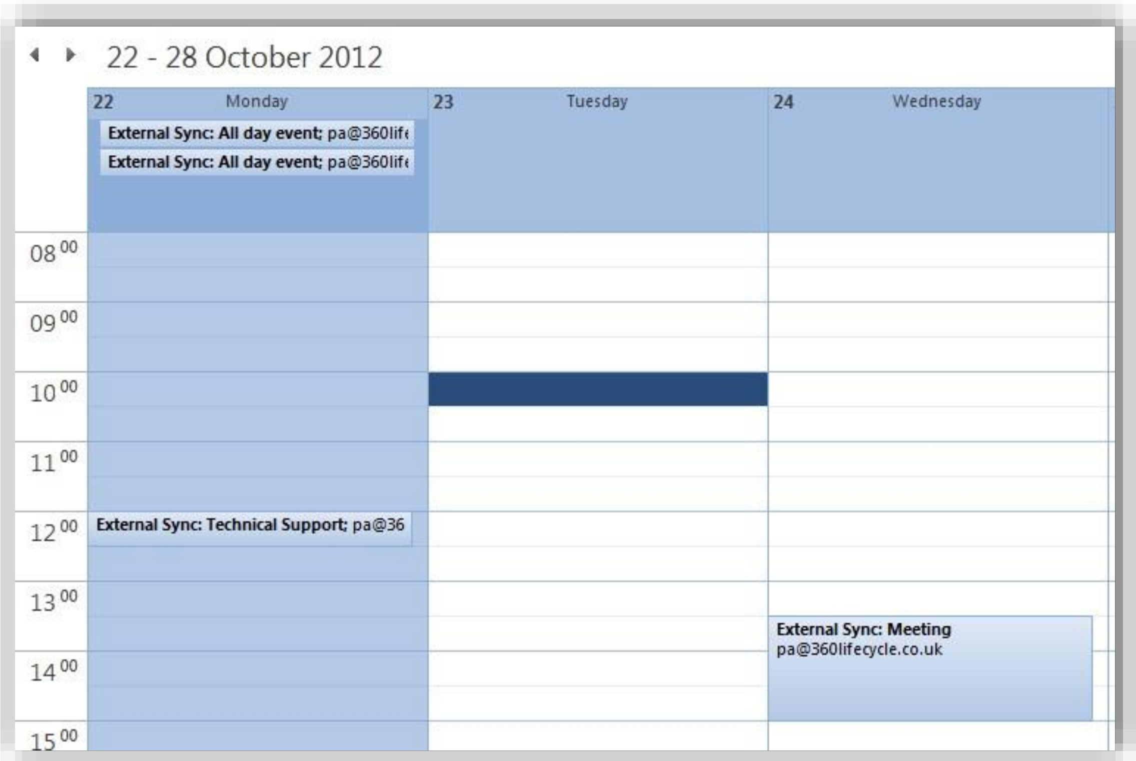


How do I make a new appointment/block out time in 360 Advisor appear in my existing diary?

Create an appointment/block out time in your 360 diary as normal. Now you have diary integration enabled you will receive an invitation email from pa@360lifecycle.co.uk to your personal (external) email account (the account you have integrated with) notifying you of the new appointment/blocked time in your diary. When you have received this, you will have the options to **'Accept'**, **'Maybe'** or **'Decline'** the appointment.



Accepting the invitation will put the appointment/meeting, etc into your external email calendar while declining will mean it won't.



An example of an accepted invitation

<u>NB: </u>You cannot edit an appointment/blocked time/daily note through your external email calendar if it has been sent through from 360 Advisor. Amendments have to be done through the 360 Advisor diary.

Note: For the purposes of this user guide the above screen shots comes from Microsoft Outlook 2010.

Double clicking on the appointment within your diary you can access any notes or information about the appointment. If it is a client appointment and the client is already saved onto the system, the clients contact details will also be displayed in the appointment message.

How do I make an appointment/blocked time in my existing diary appear in my 360 Advisor diary?

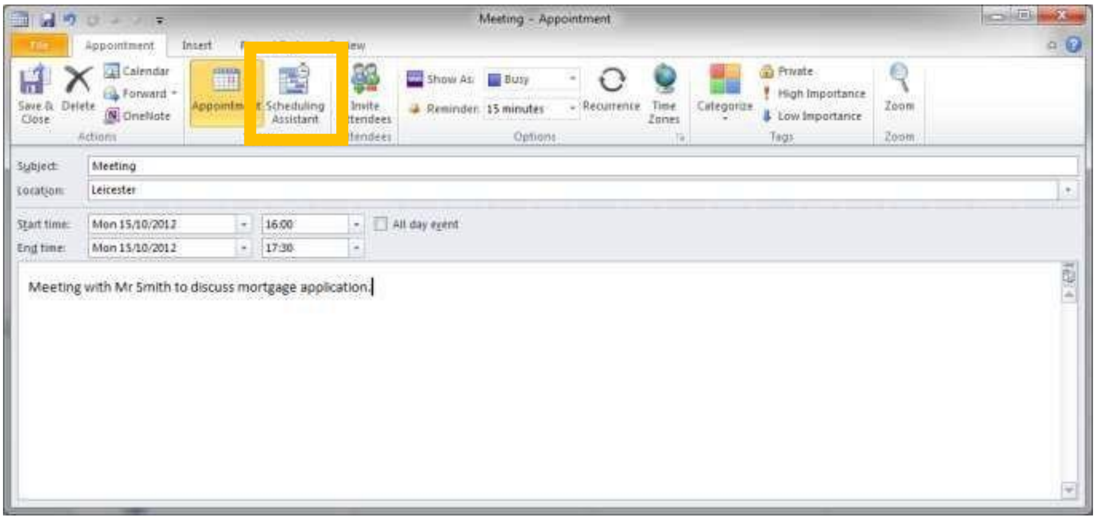
Within your existing external email calendar right click on the day and time that you would like to set up an appointment, as you would usually. Select **'New Appointment'**, or your external calendar equivalent.

Enter, as asked for, the details of the appointment. Before clicking on 'Save and Close', or 'Send', you need to invite pa@360lifecycle.co.uk as an attendee. For the purpose of this guide the following instructions on how to do this are done through Microsoft Outlook 2010 but if you are unsure how to go about this with another email calendar (one that is compatible with calendar and diary integration) please ring the 360 Lifecycle Support Team on 0116 240 8621.

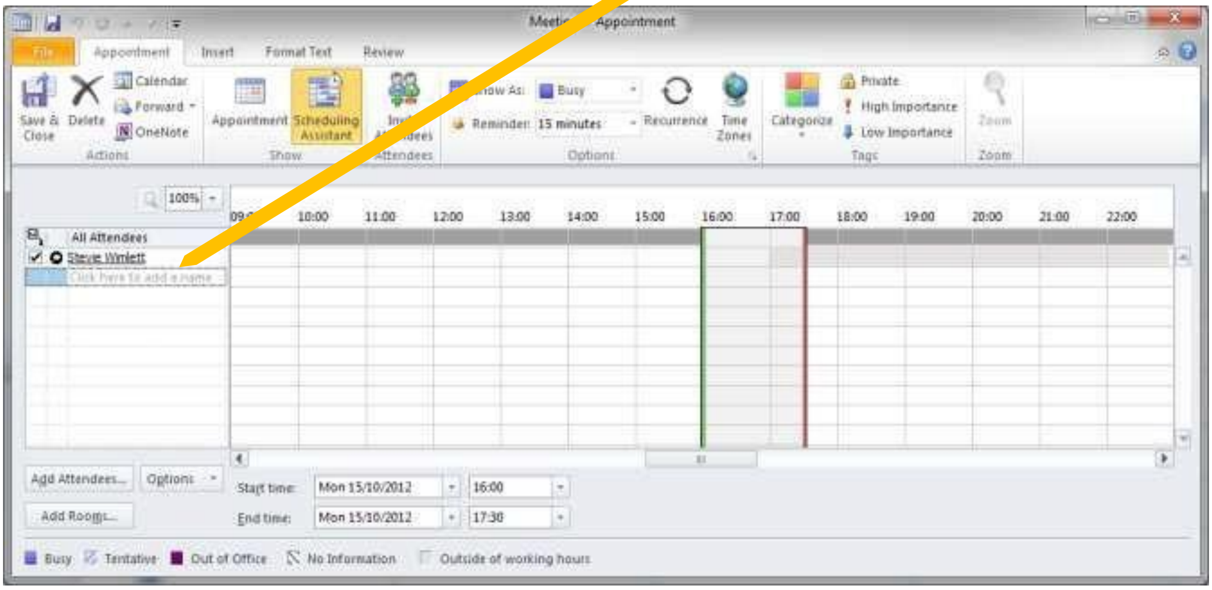
In Microsoft Office 2010, add your appointment as usual. Below will show how to use both **'Scheduling Assistant'** and **'Invite Attendees'** to schedule your external appointment invitation to 360 Advisor.

Scheduling Assistant

Click on 'Scheduling Assistant' in your appointment initiation.



In the screen that appears you will need to add pa@360lifecycle.co.uk in the attendee's bar.



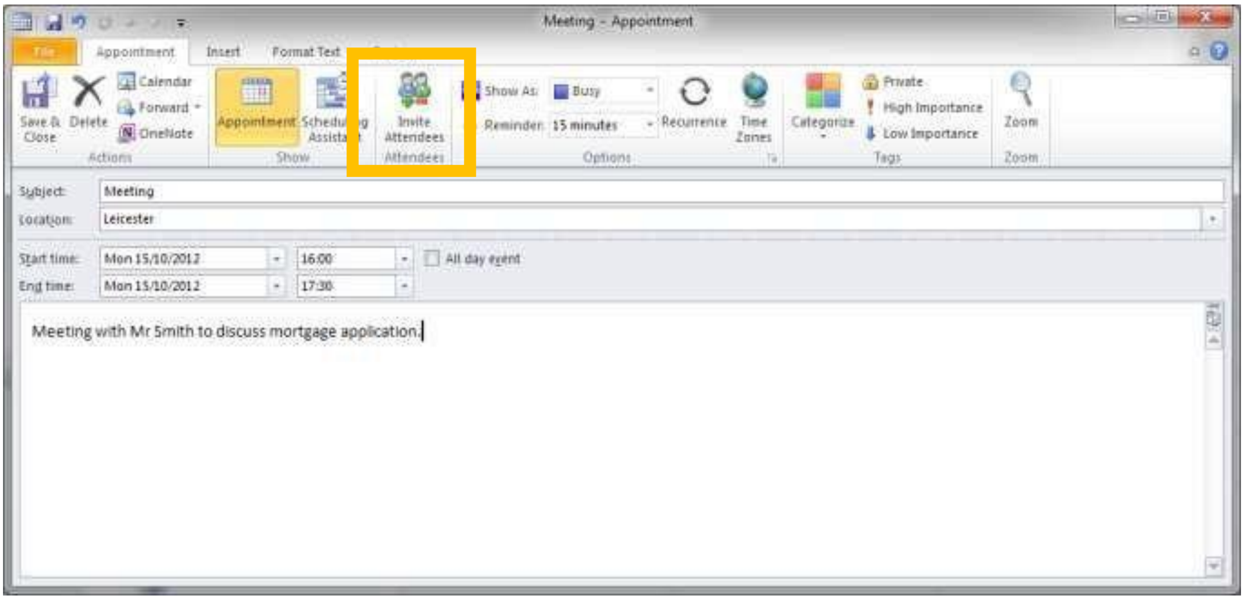
Once you have added this, along with any other attendees you wish to invite, click back onto 'Appointment' where you can now send your appointment invite.

Click on 'Send'.

Note: It may take a few moments for the appointment to appear in your 360 Advisor diary and you may need to click on the 'Refresh Diary' icon under the 'Home' menu in your 360 Lifecycle Advisor system.

Invite Attendees:

Click on the 'Invite Attendees' in your appointment invitation.



In the 'To' field add pa@360lifecycle.co.uk, along with any other required attendees, and click on 'Send'.

Note: It may take a few moments for the appointment to appear in your 360 Advisor diary and you may need to click on the 'Refresh Diary' icon under the home menu in your 360 Lifecycle Advisor system.

Your appointment will appear in your 360 Lifecycle Advisor diary as shown above. You cannot edit this appointment in 360 Advisor, only in the external calendar you created the appointment from. This is the same for appointments made in your 360 Lifecycle Advisor diary that pull into your external calendar, they can only be edited through your Advisor diary.