

OnBoard Day 30 - Google Syncing

YOU MADE IT! The last day of training for new users!

I've waited to the last day for Google Sync training because I didn't want you to get all tied up with cleaning up contacts while you were going through the basic training. Many users get bogged down in the process of "cleanup" and won't continue training until everything looks just right. The purpose of the 30 day training is to give you a good overview of how Realvolve works so you know what it can do and hopefully I accomplished that goal. Today's training will show how to do a Google Sync and how to work around some of the obstacles of syncing.

What is Google Sync?

Google sync is the process of synchronizing Contacts, Calendar and Tasks between Realvolve and Google. You can setup the system to sync just contacts, just calendar or both. Once it is setup, any common information that you enter into Realvolve will Sync to Google immediately. Since most smart phones can sync with Google, your Realvolve contacts and calendar items will show on your phone for easy access. If you make changes to your contacts from your phone or from Google, it may take a couple hours for the changes to show up in Realvolve unless you use the SYNC NOW buttons in the Google sync settings.

The one thing that you should know is that the Google sync process does NOT sync ALL fields in Realvolve to Google... It can only sync the common fields that exist in Google Contacts like Names, Addresses, Phone Numbers, Groups (Tags), Notes, Birthdays and the Basic Calendar and Task items. There are many more fields in Realvolve than Google so only those fields in Google will be synchronized.

Watch the Google Sync Webinar for more detail: ([SEE VIDEO](#))

How to setup Google sync:

The first step of the process should have already been completed on **Day 6** of our training:

Settings > My Social Networks > Connect your Google Account ([SEE VIDEO](#))

Now that the Google Account is linked to Realvolve, the sync features must be turned on. Before we do that I want to explain some basic concepts of the Google system.

- Some phones only sync the contacts located in the "**My Contacts**" group of Google. If that is the case for your phone, it will be important to assign contacts to the "My Contacts" group so that the contact shows up on your phone.
 - In Realvolve, the TAG: "**System Group: My Contacts**" is the same as Google's "**My Contacts**"
 - In Realvolve, Syncing "**All Contacts**" (*Default*) will Sync **ALL** Google Contacts including those contacts in Google's "**Other Contacts**" group. The **Other Contacts** group contains phone numbers of people that called you but details on those contacts could be missing along with those contacts that do not have any group assigned to them. Many Realvolve users prefer to NOT sync the contacts in the "Other Contacts" group so limiting the sync by the "System Group: My Contacts" can be beneficial (see details below).
 - **IMPORTANT**: If you delete contacts or activities in Realvolve, Google Sync will automatically delete them in Google. If you have synchronized Realvolve with Google, Don't make the mistake of thinking that you can redo the sync by removing all names from Realvolve to bring them back in from Google. Deleting names from Realvolve will remove the contacts from Google and they will no longer exist. There is a procedure for redoing a sync, please check with support before making this mistake.
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(PLEASE READ THROUGH ALL STEPS BELOW BEFORE DOING ANY OF THEM)

SYNCING CONTACTS:

1. If you have already imported contacts from another source into realvolve and those same names **already exist** in Google then it may be easier to clear out all names in Google first and then sync all the names in Realvolve back to Google. If the names in Google do not match exactly then this is not a good option.
2. Go to **Settings > Google Sync**
3. Place a checkmark in the "**Check the box if you want to sync Contacts between Google and Realvolve**" option.
4. **VERY IMPORTANT**: There is a selection box containing the value "**All Contacts**" above the **[Sync Now]** button in the Contacts section. This indicates which contacts will be synchronized between Google and Realvolve. Some users want everything to be synchronized, while others only want contacts from a specific Tag/Group. You may have many thousands of contacts in your database but only want a few hundred of your closest contacts to be sync'd. An easy way of doing this is to setup a tag like "**My Google Contacts**" or "**Google Sync**", you can make up

your own tag name and assign it to each contact that you want sync'd. Click on the "**All Contacts**" button and select the Group/Tag that you want to sync. Many users only want to sync to Google's "**My Contacts**", in that case you should choose the "**System Group: My Contacts**" from the drop down list to prevent the "**Other Contacts**" group in Google from syncing into Realvolve. The point is you have the option to choose what gets synchronized and it is best to decide before you sync them all.

5. **NOTE:** It's much easier to deal with limiting the sync'd contacts before hand than having clean-up afterward.
6. Press the [**Sync Now**] button to sync the Contacts for the first time.
7. After Syncing the first time, you may find duplicate contacts in your database. This is caused by having existing contacts in the Realvolve database prior to syncing. You have the option to delete any duplicate contacts or merging contacts manually or automatically. While Automatic merging is faster, you run the risk of merge 2 contacts with the same name unintentionally. I recommend that you use the manual merge to verify that the correct duplicates are merged into one record. ([SEE VIDEO](#))

SYNCING CALENDAR:

1. Place a checkmark in the "**Check the box if you want to sync Activities between Google and Realvolve**" option.
2. Select the starting date of activities that you want to sync with Realvolve. This will prevent any extremely OLD calendar dates from Google from syncing into Realvolve.
3. Press the [**Sync Now**] button to sync the Calendar for the first time.
4. **NOTE:** After the sync is complete, you may have several activities in Realvolve that do not have a "Completed" date assigned and you are being reminded to complete them. This is because Google does not maintain a "Completed Date" to indicate when an activity has been done. In this event you can select a date in the "Set all activities as completed prior to date" then press the [**Set Completed**] button. This will remove these older activities from the notification system of Realvolve.

While this may be the last day of training for this series, there is still plenty to learn - New features are getting added every 2 weeks so keep an eye open for additional training emails.

If you have any questions, please contact us at: support@realvolve.com

Questions?

Please direct questions and comments to support@realvolve.com.

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