Adjusting Your Calendar Permissions

1. Right-click your personal calendar and choose Sharing Permissions...
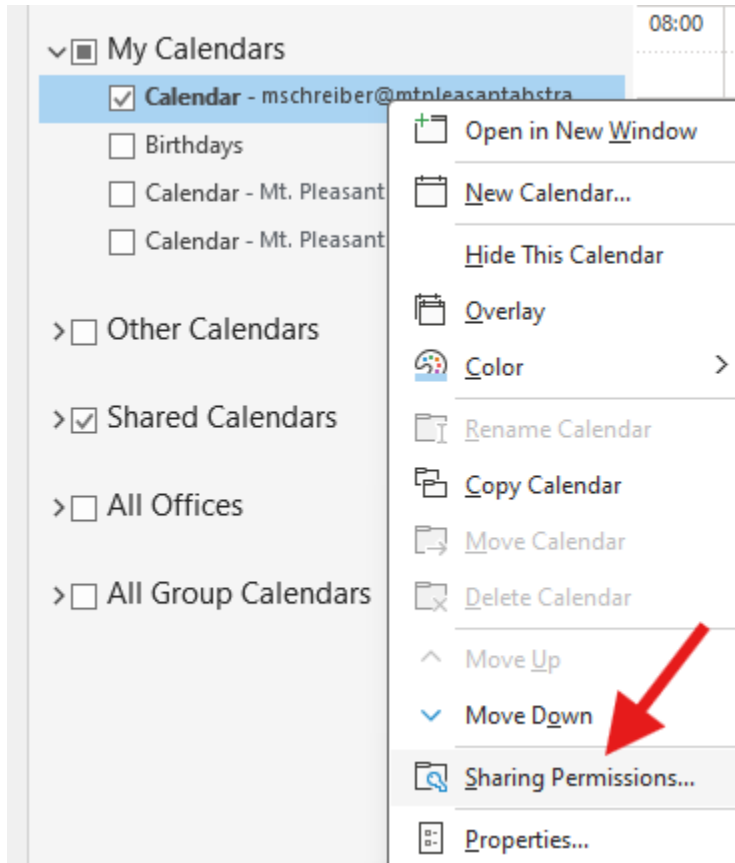
2. Make sure My Organization is highlighted in the top section, and then change the Permissions level to Can view all details

Calendar Properties   ×

General AutoArchive **Permissions** Synchronization

Currently sharing with:

Name	Permission Level
My Organization	Can view all details

Add...   Remove

Permissions

Changes you make to these permissions will apply to all users in your organization.

○ None
○ Can view when I'm busy
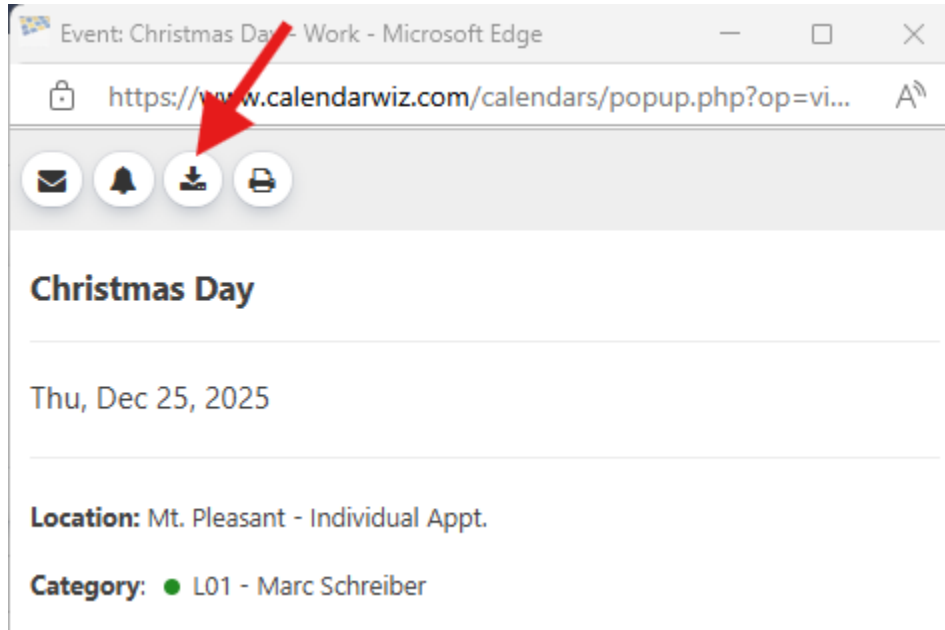○ Can view titles and locations
● Can view all details
○ Can edit

OK   Cancel   Apply

3. Click Apply and OK

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Downloading an event from CalendarWiz

1. Click on the Event in CalendarWiz (not the edit link)

2. Click the download icon

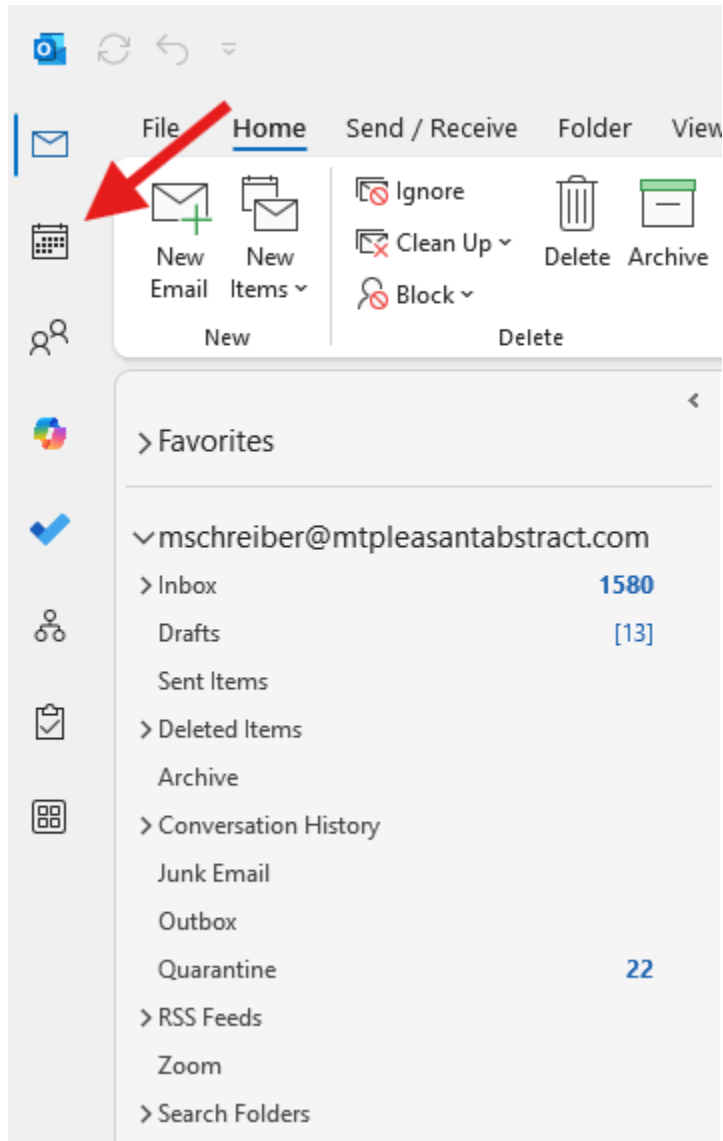Note: If asked what program to open the .ics file with choose Outlook and Always

3. Click Save & Close
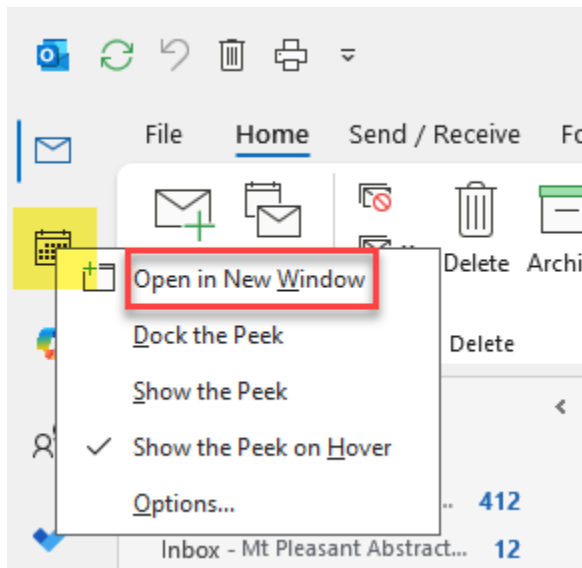
Opening Outlook Calendar

1. Click the Calendar icon in the left Navigation of Outlook

Opening Outlook Calendar in a second window

You may wish to open the Calendar in a second window, instead of viewing it inside of your Outlooks. Follow the steps below:

1. Right click the Calendar Icon

2. Select Open in New Window.

Adding a Shared Calendar not in your list already

1. From the Home tab in Outlook Calendar click Add Calendar → Open Shared Calendar...
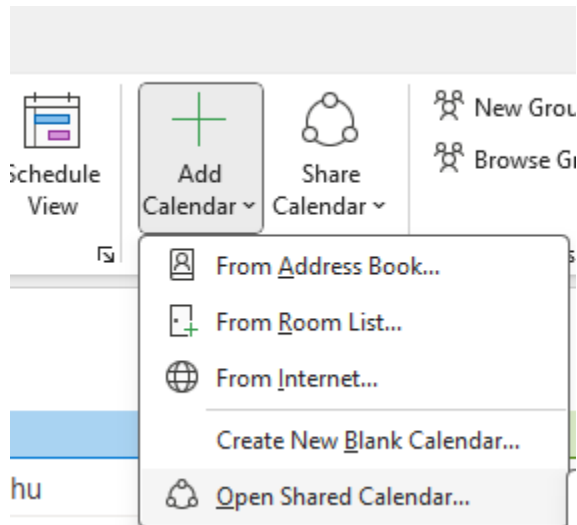
2. Type the email address for the office calendar (in most cases dedicated@officename.com) or the individual's address
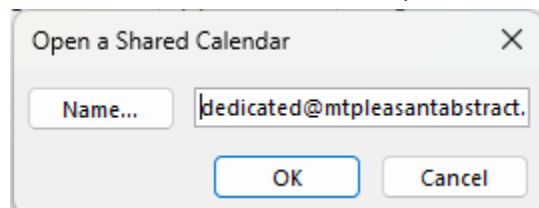
3. Click OK

4. The Shared Calendar will now show in your list
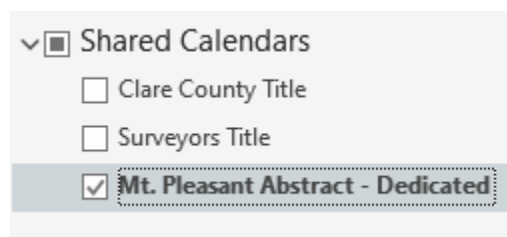
Using the Closing template from Resware

1. Open file in Resware

2. Go into Documents

3. Select Create

4. Type in Filter: Closing Calendar Template

5. Select Create Selected

6. In this example, I'm scheduling this closing for 2pm June 5th. Double click 2pm on the Closing Calendar

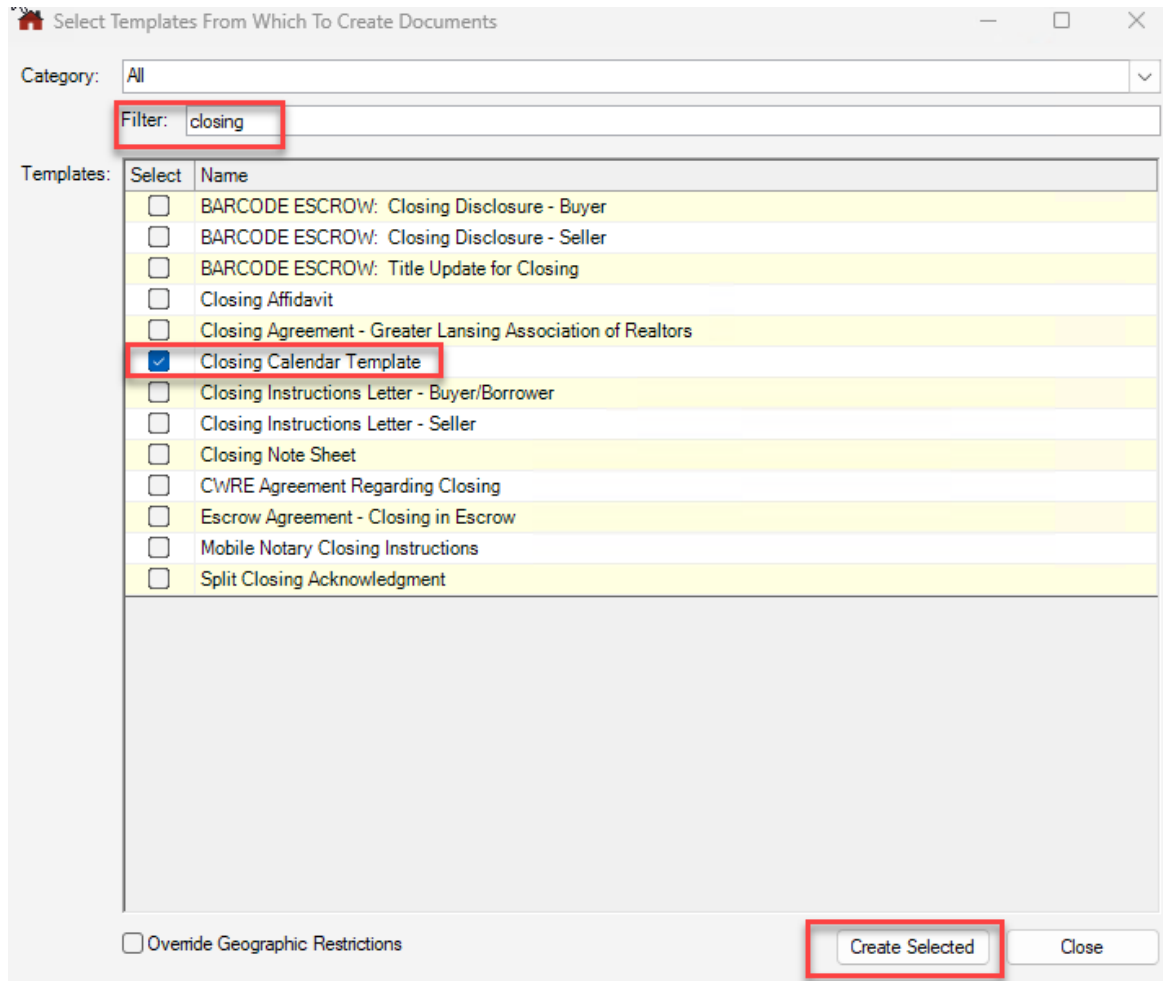7. Copy the Title from the Word doc to the Title of the Calendar Appointment

8. Copy the Notes from the Word doc to the Notes of the Calendar Appoint

9. Adjust the following:

   a. Add closer name to title

   b. Add closer as a Required Attendee

   c. Set end time to 1 hour

   d. Select Location – Select the Closing Room

   e. Select Categorize – Choose "Red" (See Color Statuses for Closing Appointments for more details).

   f. Add your initials to the 'Employee Scheduled" section so the closer/processor knows who scheduled the closing

   g. Add your initials to the modified, if you change the closing appointment.

   h. Hit Send.

Color Statuses for Closing Appointments

RED = Just Scheduled/Not Assigned

YELLOW = Processor Assigned/Being worked on

Green = Done/Printed

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Overlaying a Calendar

To assist in scheduling a closing, it may be helpful to "overlay" your closers calendar on the Closing Calendar.

When you open both the Closing Calendar as well as your Closer's Calendar – the calendars will sit side by side:
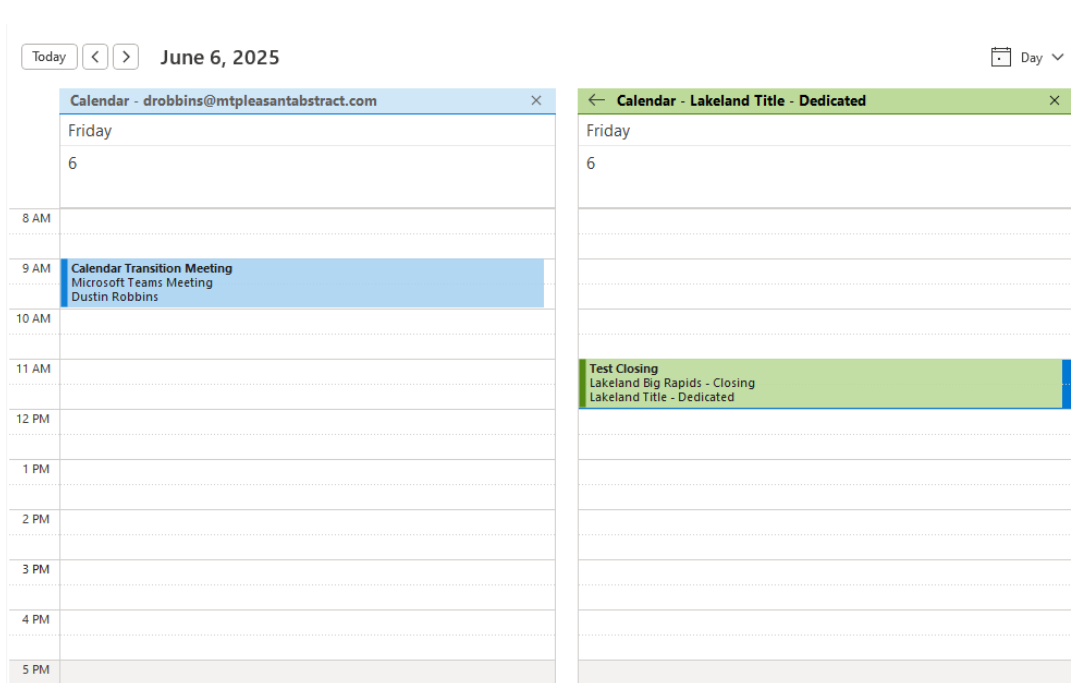
To overlay the calendar simply right click on the closer's calendar and select "overlay" – this will place the closers calendar within the closing calendar.

NOTE: If you have multiple calendars, overlaying selects the first calendar to the left. You may need to rearrange your calendars.
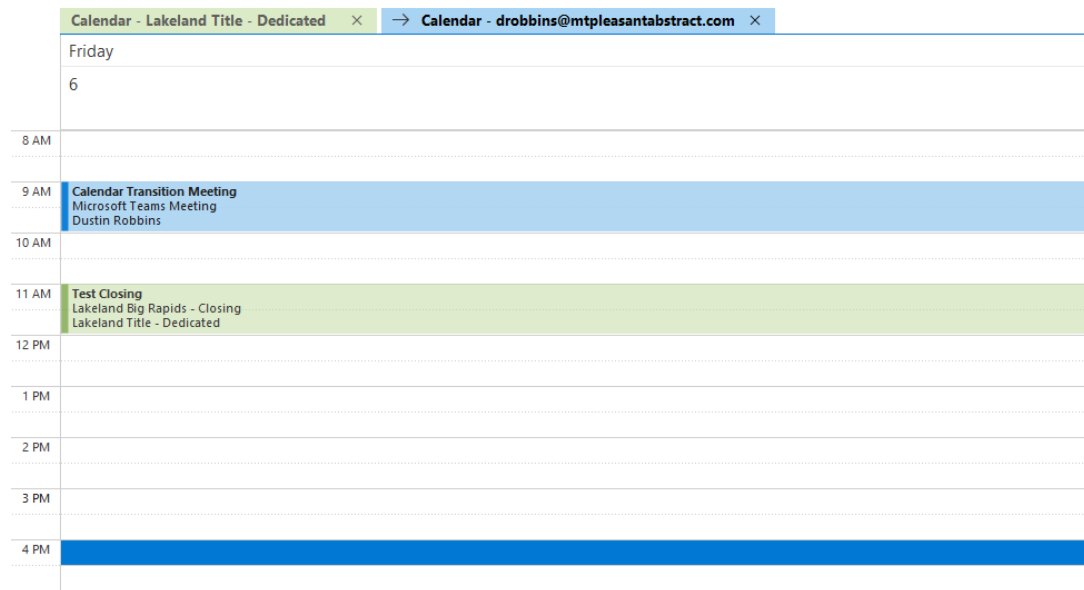
To remove the Overlay – right click on the calendar and Select Overlay. That will separate the calendars.

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Sharing Your Personal Calendar

You may want to share your calendar for various reasons. Closers should share their personal calendar with their office staff and those that schedule closings on their behalf.

To share your calendar:

1. Right click your calendar and Select Sharing Permissions.
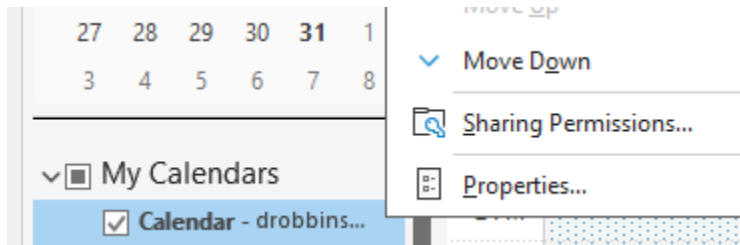
2. Select the person you want to share your calendar with (you can multi-select) and Select OK.
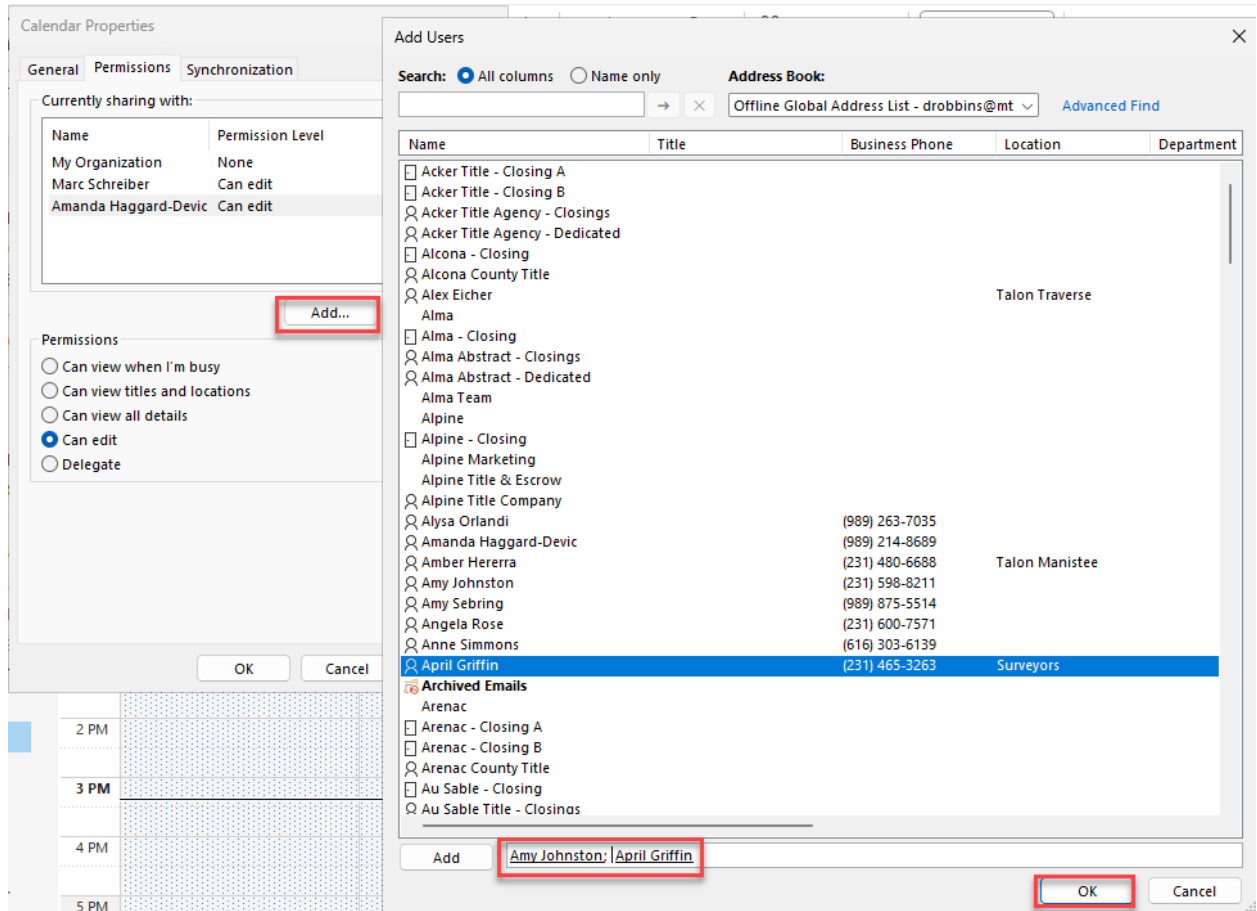
3. This gives access to view all details on your calendar. You do have the ability for those that you share with you edit your calendar as well.

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Adding a Personal Appointment to your Outlook Calendar

1. In the Calendar make sure that you have selected your personal calendar. The bolded font indicates you have selected your calendar.

2. Select New Appointment

3. Fill out the Appointment information
   a. Title – "Doctor Appointment"
   b. Start/End Times.
   c. Show As: "Out of office"
   d. *Optional* - you can set a reminder to alert you – this calendar defaults to 15 minutes before – but you can change this to anything you wish
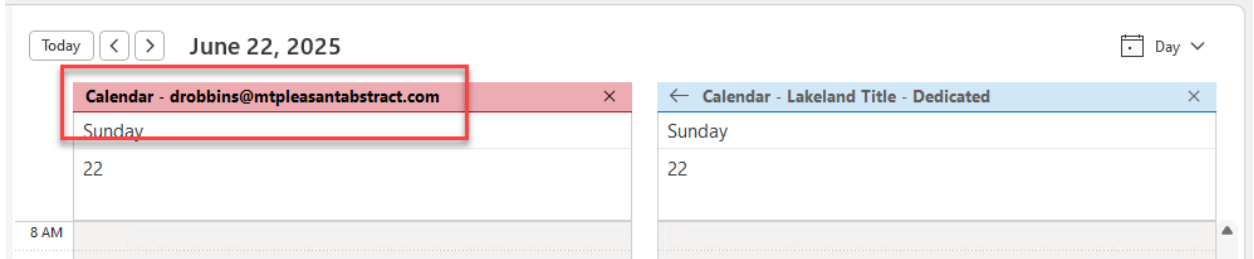   e. *Optional* - you can set an appointment Private so that the details aren't viewable with those that you have shared our calendar with

Select Save & Close.

NOTE: You do not need to invite yourself to this appointment.
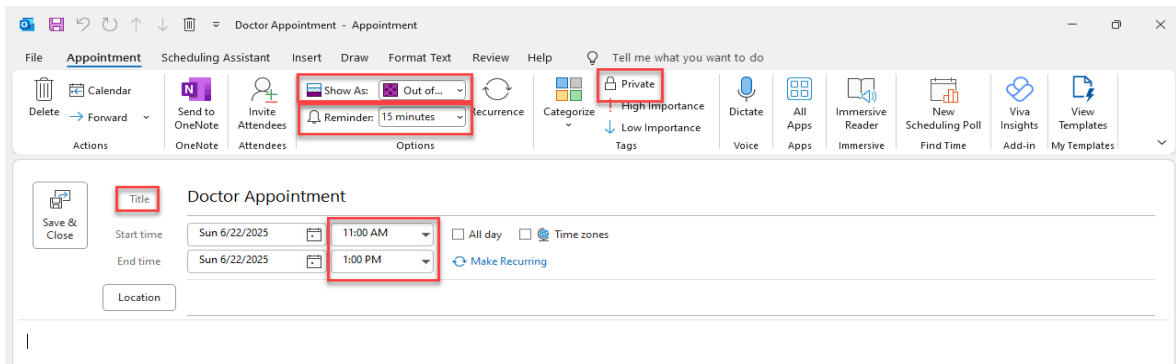
IMPORTANT
Any sort of time off, whether vacation/sick/bereavement/jury duty etc. should be added to Paychex as soon as possible.

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Personal Settings in Outlook Calendar

There are several Settings that you can edit for your personal preferences.

1. Go to File
2. Select Options in the bottom left corner
3. Select Calendar

Work Time
Select your Start/End time to 8-5pm Monday to Friday – that will help set the view to business hours.   You can still see before 8 and after 5.

Default duration for new appointments for appointments and meetings: We suggest changing this to 1 hour.

Default reminders: Closers – you may want to set this 0 minutes if you don't want closing pop up notifications. Everyone else you may want this at 15 minutes.

Add holidays to the Calendar: Select Add Holidays – Selected United State – Select OK

Accessing Outlook Calendar from your smartphone

1. Navigate to the **Calendar** section of Outlook Mobile.

2. Tap on the **Menu** button in the top left-hand corner of the app. From the menu that appears, tap the **+** button in the top left-hand corner.
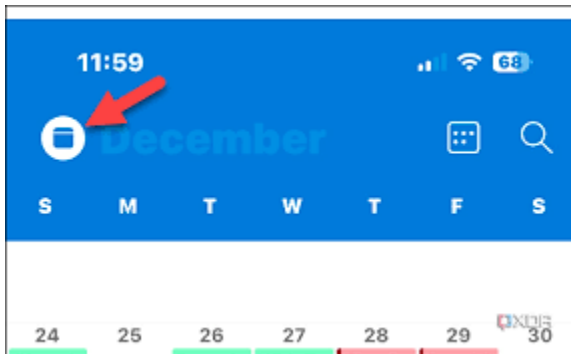
3. Tap on **Add Shared Calendar** on iOS, or **Add a shared calendar** on Android.

4. Search for a person, room, or other mailbox in your organization. Tap the **+** button next to the person, room, or other mailbox to add that shared calendar.

5. The newly added shared calendar will appear in the list of calendars under your Microsoft 365 account.

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Calendar Email Address for every office

Mt. Pleasant Abstract	dedicated@mtpleasantabstract.com
Alma Abstract	dedicated@almaabstract.com
Gateway Title	dedicated@gatewaytitleco.com
Lakeland Title	dedicated@lakelandtitleco.com
Surveyors Title	dedicated@surveyorstitle.com
Three Lakes Abstract & Title	dedicated@3lakestitle.com
Thunder Bay Title	dedicated@thunderbaytitle.com
Huron Shores Title	dedicated@huronshorestitle.com
Arenac County Title	dedicated@arenaccountytitle.com
Alpine Title Company	dedicated@alpinetitleco.com
Iosco County Abstract	dedicated@ioscoabstract.com
Au Sable Title & Escrow	orders@ausabletitle.com
Acker Title Agency	dedicated@ackertitle.com
Lake County Title & Escrow	dedicated@surveyorstitle.com
CNFC Title	orders@cnfctitle.com
Saginaw Bay Area Title	dedicated@saginawbaytitle.com
Ogemaw County Title & Escrow	dedicated@ogemawcountytitle.com
Alcona County Title & Escrow	dedicated@alconacountytitle.com
The Talon Group – Traverse City	traversecity@talongrouptitle.com
The Talon Group – Manistee	manistee@talongrouptitle.com
The Talon Group – Ludington	ludington@talongrouptitle.com
Northern Title of Alpena	dedicated@northerntitlealpena.com
Oceana Land Title & Escrow	info@oceanalandtitle.com
Clare County Title	dedicated@gatewaytitleco.com