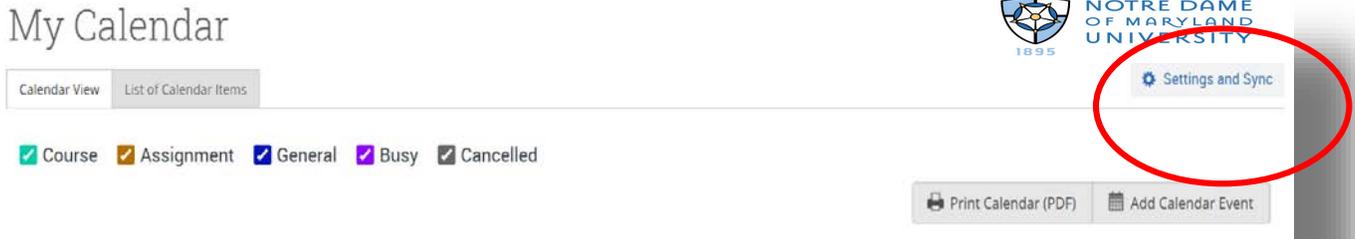


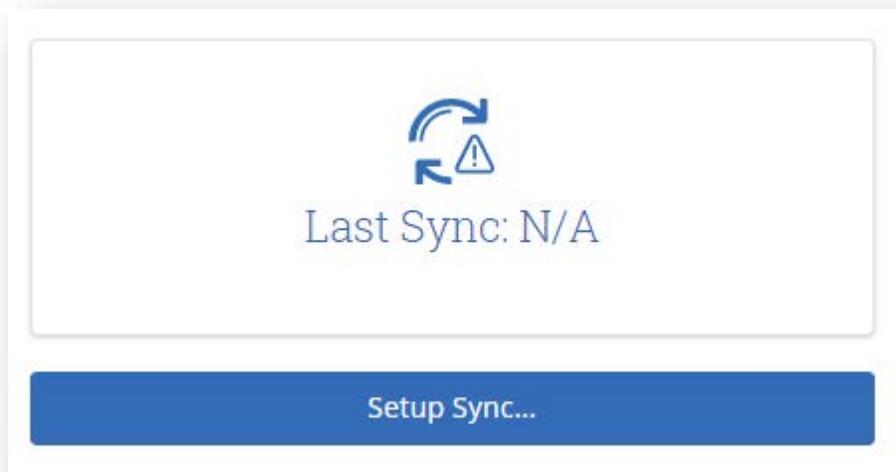
Sync Your Calendar

Individual User Permissions Setup: Outlook

1. Login to the platform. From the advisor homepage, click on the “Calendar” icon in the purple menu to the left.
2. Click “Settings and Sync” in the upper right corner.



3. Click “Setup Sync”



4. Choose Microsoft Outlook. Then choose Outlook Service Accounts.

Setup Complete! Navigate will begin to sync data. You can leave this page if desired but please allow up to 5 minutes for the data to fully sync.

Note: Ignore if shown “Will be deprecated in 2020”. It doesn’t apply to our configuration but are unable to change the message.