

YOUR PRACTICE, CONNECTED

Advium Gmail & Calendar Connector

From conversation
to considered follow-through.



ADVICE WORKSPACE



GMAIL & CALENDAR

EMAIL / MEETINGS / TRANSCRIPTS / FILE NOTES

KEEP THE CLIENT JOURNEY TOGETHER

More context. More time for clients.

YOUR GUIDE TO THE CONNECTION

A connected client journey.

A practical introduction to the workflow, your choices and the steps your team still reviews.

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ABOUT THIS GUIDE

Gmail, Google Calendar and the meeting notetaker are separate connections. Availability depends on firm configuration and authorisation.

01 / GMAIL

Find the context. Skip the inbox hunt.

Incoming and sent Gmail messages that match recorded client email addresses can be filed against the client in Advium.

Client email history

Received

Review meeting questions

Sent

Documents for our discussion

Received

Thanks, see you on Tuesday

01

See the subject, date and message snippet.

02

Keep relevant correspondence with the client record.

IN PRACTICE

Matched by the email address on the client record.

Illustrative client-matched email history. Confirm your firm's enabled capabilities before rollout.

02 / GMAIL

From meeting context to a considered reply.

Use the meeting workspace to draft a follow-up from the transcript. Review the wording and recipients before sending through your authorised mailbox.

Follow-up email draft

Discussed

Goals and priorities

Next steps

Documents to provide

Before sending

Review wording and recipients

01

Start with a draft, then make it yours.

02

Sending uses a separate Google authorisation.

IN PRACTICE

Draft then adviser review then send.

Illustrative reviewed follow-up. Confirm your firm's enabled capabilities before rollout.

Keep the next step close to the conversation.

Email context sits alongside the meeting work in Advium. Add Google Calendar and the meeting notetaker to connect the wider workflow.

Meeting workspace

Conversation

Meeting transcript

Client record

Reviewed file note

Follow-through

Reviewed follow-up email

01

Review a transcript and draft file note.

02

Keep your team's follow-through in the workspace.

IN PRACTICE

Calendar and meeting capture require their own setup.

Illustrative connected meeting workflow. Confirm your firm's enabled capabilities before rollout.

04 / GOOGLE CALENDAR

Your next meeting. Already in the picture.

Google Calendar events with a supported online meeting link can become meetings in Advium, ready for the next part of the client journey.

Upcoming meeting

When

Tuesday · 10:00 am

Where

Online meeting link

Who

Client and adviser

01

Use joinable Google Meet, Teams or Zoom events.

02

Client matching uses participant email addresses.

IN PRACTICE

Online meetings with a supported join link.

Illustrative calendar event. Confirm your firm's enabled capabilities before rollout.

Give the conversation your full attention.

With the Advium meeting notetaker enabled, a bot can join eligible meetings and bring the transcript into the meeting workspace.

Meeting capture

Before

Check joining and recording settings

During

Notetaker joins the eligible meeting

After

Transcript returns to Advium

01

Choose which meetings the notetaker joins.

02

Use your firm's recording and consent process.

IN PRACTICE

Calendar alone does not record or transcribe.

Illustrative notetaker workflow. Confirm your firm's enabled capabilities before rollout.

A useful record. A clearer next step.

Use the transcript to draft your file note and follow-up. Review the outputs and keep the agreed next steps with the client's work.

Ready for adviser review

Transcript

The source conversation

File note

Draft for review

Follow-up

Email draft to check

01

Automatic summary and file-note drafts are opt-in.

02

Add Gmail for authorised email sending.

IN PRACTICE

Capture then draft then review.

Illustrative meeting deliverables. Confirm your firm's enabled capabilities before rollout.

YOUR FIRM, YOUR CHOICES

Start with the right access.

Connect only the capabilities your team needs, then walk through one client workflow together.

01

Client email history

Authorise mailbox reading to bring matching incoming and sent messages into the client history. This is context, not a full replacement inbox.

02

Reviewed email sending

Sending is authorised separately. Review the follow-up wording and recipients before sending through your mailbox.

03

Calendar and meeting capture

Authorise Calendar for events. Separately enable the notetaker, complete the required recording attestation and choose joining policies. Manage consent and individual overrides.

04

Drafting and review

Automatic meeting summaries and file-note drafts are opt-in. Advisers review the output. Follow-up emails are checked separately.

LET'S MAKE IT WORK FOR YOUR FIRM

See your workflow in Advium.

Is this a complete Gmail inbox inside Advium?

No. Adviser mailbox sync keeps client-matched email context: subject, dates, addresses and a short snippet. It does not reproduce the full Gmail inbox, message bodies or attachments.

Can I send email from Advium?

The sending workflow uses separate Google send authorisation. Your firm's setup must support it. Review the draft, recipient and wording before sending.

Does connecting Calendar record every event?

No. Calendar provides event information. Meeting capture requires a supported online meeting link, the notetaker, firm enablement and the appropriate joining and recording settings.

Can we control which meetings are captured?

Yes. Joining policies and individual meeting overrides govern eligible meetings. Your firm must complete the required recording attestation and manage consent. Usage limits also apply.

**Bring your team.
Explore the connection.**

advium.ai/book-demo

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