



Managing Calendar in Zoho CRM

Planning and scheduling is important when it comes to business meetings. A well conceived plan goes a long way in bringing positive results whereas, properly scheduled meeting can complement your planning. Businesses attend meetings for various reasons and also hold meetings of different types -In-house seminars, networking events to engage with customers, dinner or lunch meetings, charity functions and fund raisers, webinars and trainings for customers, board meetings and monthly team meetings, product launch parties to create a buzz, press conferences, trade shows, etc.

Having to keep track of all these in a note pad is definitely not a solution. Calendars are the right choice that shows you the list of meetings by day, week and month. Marking your meetings and calls in a calendar, helps you track the upcoming meetings and calls that are scheduled. Most importantly, it gives you an idea of what is lined up for the day and how your week is going to be.



While working with Zoho CRM where all your customers' details are available, you can make use of the built-in calendar for plan your meetings and schedule calls.

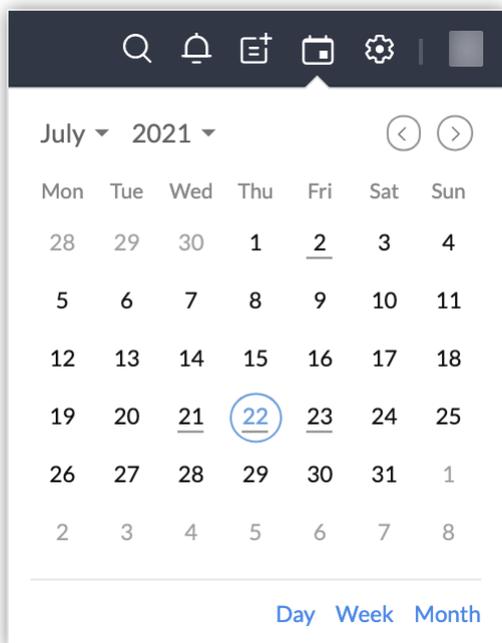
- Create recurring meetings that would take care of automatically scheduling weekly or monthly meetings.
- Set up personal preferences for reminders, working hours, holidays, cooler coding meetings etc.. to suit your convenience.
- View calendars of other users based on the organizational hierarchy.
- Import meetings from another calendar and also export meetings from Zoho CRM's calendar.
- Accept meeting invitations from other users.
- Make calls directly from the calendar.
- Get a clear picture of the day's, week's and month's meetings and calls.

Set Calendar Preferences

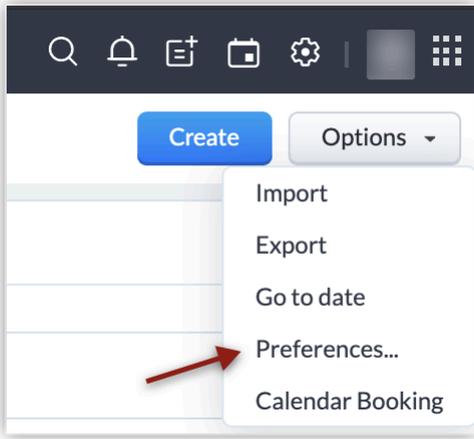
Before you start using your calendar, set up your preferences such as when you want reminders of the meetings, what your working hours are, whether you want to hide meetings that you are not attending, the default duration of meetings and calls, etc. These settings are applicable only to your calendar.

To set calendar preferences

1. Click  (Calendar icon) and then click **Day**, **Week** or **Month** to view your calendar.



2. In your calendar, click **Options** > **Preference**.



3. **Preferences** - Specify the following preferences for your calendar. These preferences are reflected only in your calendar and not in other users' calendars.

Preferences

Days in week view

Week starts on

Day starts at

Day ends at

Weekly Holiday 1

Weekly Holiday 2

Activity Type

Default Meeting Duration

Default Call Duration

Hide Meetings day(s) after they've ended.

Hide declined Meetings

CalDAV Access

You may access the Zoho CRM calendar from other calendar applications using CalDAV. [Learn More](#)

CalDAV Access

Manage Unavailability

To avoid conflicts between your CRM activities and other events you might be engaged

- **Days in week view** - You can view only the 5 working days of the week or all 7 days including weekends.
- **Week starts on** - Choose the first working day of the week.
- **Day starts at** - Specify the time your day starts at work.
If you create an all-day meeting, the reminder options available are **On the day of the meeting, 1 day before the meeting, 2 days before the meeting** and **1 week before the meeting**. The reminder time will be an hour before the time the day starts.
- **Day ends at** - Specify the time your day ends at work.
- **Weekly Holiday 1** and **Weekly Holiday 2** - Specify your weekly holidays. It can either be Saturday and Sunday or any other day of the week.
- Select the **Activity Type** from the drop-down list. You can choose to view only meetings, or calls or both meetings and calls in your calendar.
- Select the **Default meeting duration** and the **Default call duration** from the respective drop-down lists. For calls, this is important as based on the approximate time when the call will get over, your availability to attend other calls or meetings can be identified.
- **Hide meetings ___ day(s) after they've passed** - On selecting this checkbox your meeting will not be available in the calendar after the specified number of days.
- **Hide declined meetings** - If you decline a meeting, you can choose to not have it in your calendar by selecting this checkbox.
- **Color coding** - Under the color coding option, you can customize the colors of the picklist values that are set by the administrators according to your preference. These colors will be displayed only in your account.
- Set the **Status** of **CalDAV Access** to **Enable** if you wish to access the Zoho CRM calendar from other calendar applications using CalDAV.

Preferences

Weekly Holiday 2: Sunday

Activity Type: Meetings × Calls ×

Default Meeting Duration: 1 Hour

Default Call Duration: 15 Minutes

Hide Meetings 30 day(s) after they've ended.

Hide declined Meetings

CalDAV Access

You may access the Zoho CRM calendar from other calendar applications using CalDAV. [Learn More](#)

CalDAV Access

Manage Unavailability

To avoid conflicts between your CRM activities with outside the purview of CRM, you can manage your calendar automatically based on information from other products.

You can set-up and manage unavailability sync for various products.

Zoho Products

- Zoho Calendar
- Zoho Recruit

Other Products

- Google [Manage in marketplace](#)

CalDAV Access

You may access the Zoho CRM calendar from other calendar applications using CalDAV. [Learn More](#)

CalDAV Access

Configuration Details

Server	crm.zoho.com
Port	443
Requires SSL	Yes

[Done](#)

4. **Manage Unavailability** - You can use this feature to reserve time in your CRM calendar for events from corresponding products without syncing all events. Once the sync is set up successfully, you will have the ability to automatically mark yourself as unavailable in the Zoho CRM Calendar based on events from other product calendars.

Preferences
You may access the Zoho CRM calendar from other calendar applications using CalDAV. [Learn More](#)

CalDAV Access

Manage Unavailability

To avoid conflicts between your CRM activities and other events you might be engaged with outside the purview of CRM, you can mark yourself as unavailable in the CRM calendar automatically based on information from other products.

You can set-up and manage unavailability sync for the following

Zoho Products

Zoho Calendar	<input type="checkbox"/>
Zoho Recruit	<input checked="" type="checkbox"/> Manage

Other Products

Google	Manage in marketplace
--------	---------------------------------------

Zoho Meeting Audio Preferences

Use built-in audio
 Use my own conference call service

Reminders

Meetings: 15 minutes before
All-day Meetings: 1 day before (8 AM)

Turn off reminder via email

Notifications

Notify me when a Meeting is assigned to me.

[Done](#)

Setup unavailability sync for Zoho Recruit

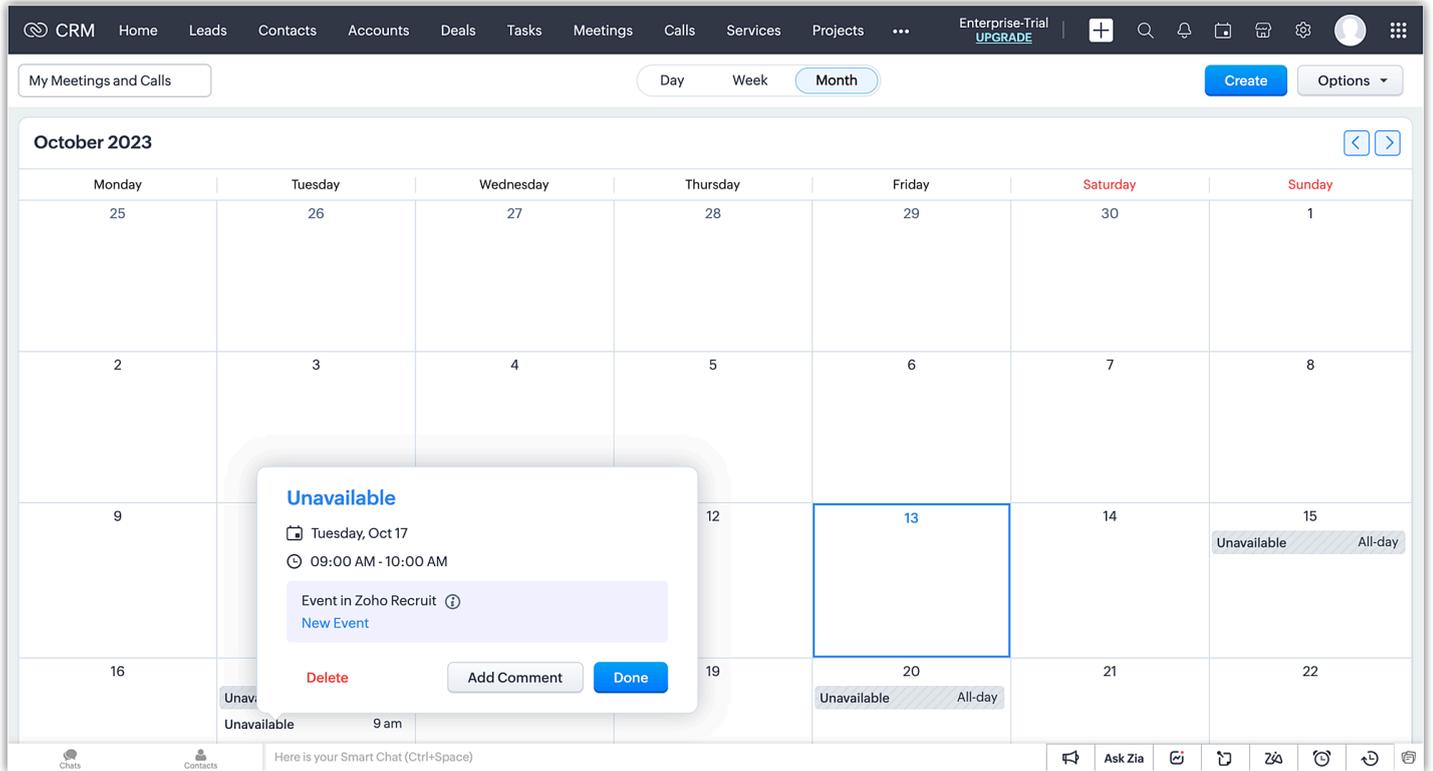
Select the type of information from Zoho Recruit for which you would like to block time in CRM calendar.

- Events
- Interviews

[Cancel](#) [Save](#)

This helps prevent any scheduling conflicts between your CRM activities and other engagements outside the scope of CRM. You can enable unavailability sync for in-house Zoho Products like Zoho Calendar and Zoho

Recruit as well as other products such as Google/Office 365 calendar suites from the marketplace.



5. **Meeting Audio Preferences** - Select the audio preference for meetings via Zoho Meeting, whether to use in-built audio or your own conference call service.

Zoho Meeting Audio Preferences

Use built-in audio

Use my own conference call service

6. Specify the following to set reminders for the upcoming meetings in your calendar. This reminder option will not be applied to calls.

Reminders

Meetings

All-day Meetings

Turn off reminder via email

- **Meetings** - When do you want a reminder for the meeting- 5 minutes before the meeting starts, 15 minutes before or more?
- **All-day meeting** - When do you want a reminder for an all-day meeting- on the day of the meeting or before that?

- **Turn off reminders via email** - On selecting this, you will not receive reminders via email for the meetings on your calendar.

7. For notifications, select the **Notify me when a meeting is assigned to me** checkbox.

8. Click **Save**.

Note

- When you access other user's calendar, and the Holidays do not match, automatically all the 7 days of the week will be available in the calendar, irrespective of the calendar preferences of either user.