



**Zoho Corporation**

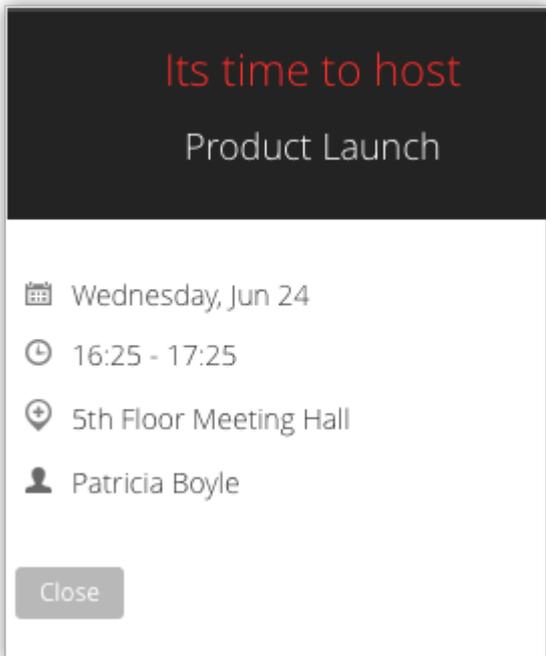
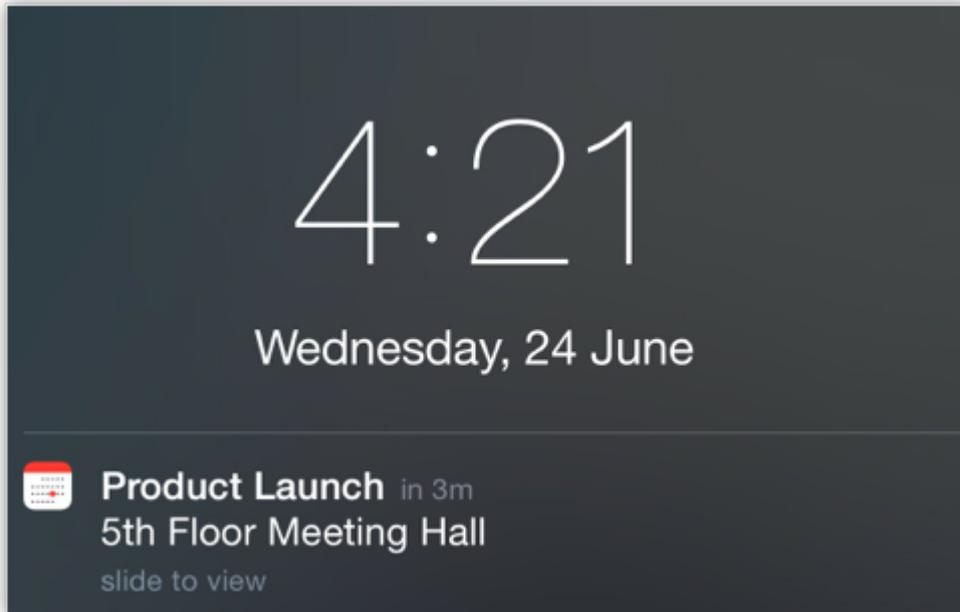
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## Setting Up Calendar Synchronization via CalDAV

Gone are the days when you had to log in to Zoho CRM every time you wanted to check your work schedule for the day. You can now receive alerts about the next staff meeting on your iPhone or even your Apple Watch, without having to log into Zoho CRM!

Zoho CRM supports Calendar synchronization with any iOS device (iPhone, iPad, MacBook as well as Apple Watch) via CalDAV configuration. The result – any event that you create in Zoho CRM will be synchronized with your iOS Calendar and vice versa.

Here, an event called “Product Launch” created on an iPhone seamlessly synchronizes with Zoho CRM as well as the Apple Watch. Here are some screenshots of alerts on the iPhone, Apple Watch as well as Zoho CRM.



## Manage events efficiently

By enabling CalDAV configuration on your iOS device, you can manage all your events efficiently. Let's say CalDAV pushes events from Zoho CRM to your iPhone. This way you can see both personal events as well as your business events on your iPhone Calendar. If you find that a lunch date overlaps with a staff meeting, you can quickly reschedule the events from the iPhone based on your priorities. You don't have to log back into Zoho CRM to edit an event.

## CalDAV for multiple iOS devices

You can configure CalDAV on more than one iOS device including the iPhone, iPad, MacBook and iPod Touch. As for the Apple Watch, there is no separate configuration involved. Pairing the Watch with an iOS device would be sufficient to get the alerts on your Apple Watch. The events will be synchronized between Zoho CRM and all the devices in which the CalDAV configuration has been enabled. So perhaps the next time you are driving and unable to check your iPhone, all you have to do is tilt your wrist to know the day's schedule from the Apple Watch!

## Work offline

What's more, you can also create or edit events on the phone when you are offline. When you are back online, your events are automatically synchronized in Zoho CRM.

In order to start using Calendar Synchronization via CalDAV in your iOS devices, you must first

1. Enable CalDAV access in Zoho CRM
2. Configure CalDAV account in your iOS device.

## Enable CalDAV Access in Zoho CRM

Only if you enable CalDAV Access in Zoho CRM, will you be able to configure your CalDAV account on your iOS device.

### To enable CalDAV Access in Zoho CRM

1. Log in to your Zoho CRM account.
2. Click the *Calendar* icon, and then click **Day**, **Week** or **Month** to view your calendar.
3. Click **Options** > **Preferences**.
4. In the *Preferences* popup, under the *CalDAV Access* section, select **Status** as **Enable**.  
The CalDAV configuration details are displayed.

(Note that, the sever URL for EU will be displayed as crm.zoho.eu)

The image shows a screenshot of the Zoho CRM settings interface. The top section is titled "Preferences" and contains several dropdown menus: "Weekly Holiday 1" set to "Saturday", "Weekly Holiday 2" set to "Sunday", "Activity Type" set to "Both Events and Calls", "Default Event Duration" set to "1 Hour", and "Default Call Duration" set to "15 Minutes". Below these are two checkboxes: "Hide events 30 day(s) after they've ended." (checked) and "Hide declined events" (unchecked). The bottom section, titled "CalDAV Access", is highlighted with a red border. It includes a "Status" section with radio buttons for "Enable" (selected) and "Disable". Below this is a yellow box labeled "Configuration Details" containing the following information: "Server: crm.zoho.com", "Port: 443", and "Requires SSL: Yes". At the bottom of the form are two buttons: "Save" (blue) and "Cancel" (white).

5. Click **Save**.

## Configure CalDAV Account in an iOS Device

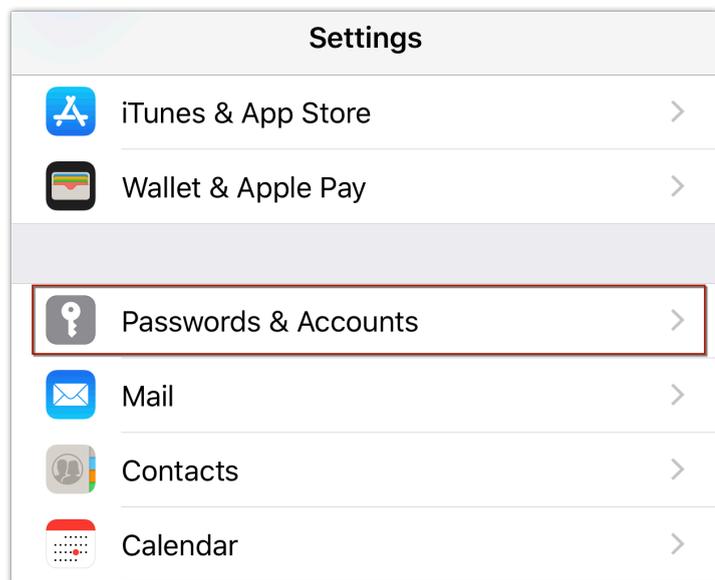
This CalDAV Calendar Synchronization is currently compatible only with iOS devices. This includes the iPhone, iPad, iPod Touch, Apple Watch and MacBook. Note that the CalDAV configuration has to be enabled on each iOS device separately, except on the Apple Watch.

As for the Apple Watch, it has to be only paired with the iPhone for calendar synchronization. You will be able to receive event alerts on the Apple Watch and not create/edit events in the Apple Watch.

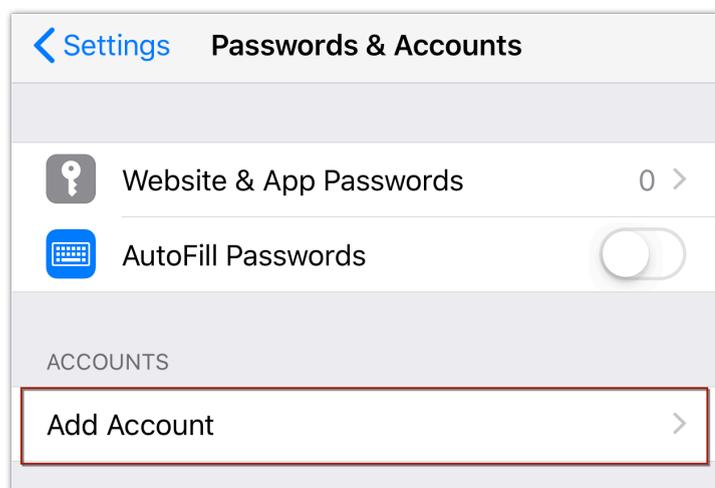
The procedure to configure CalDAV is the same for all iOS devices. The instructions for CalDAV configuration on the iPhone are mentioned below.

### To configure CalDAV on an iPhone

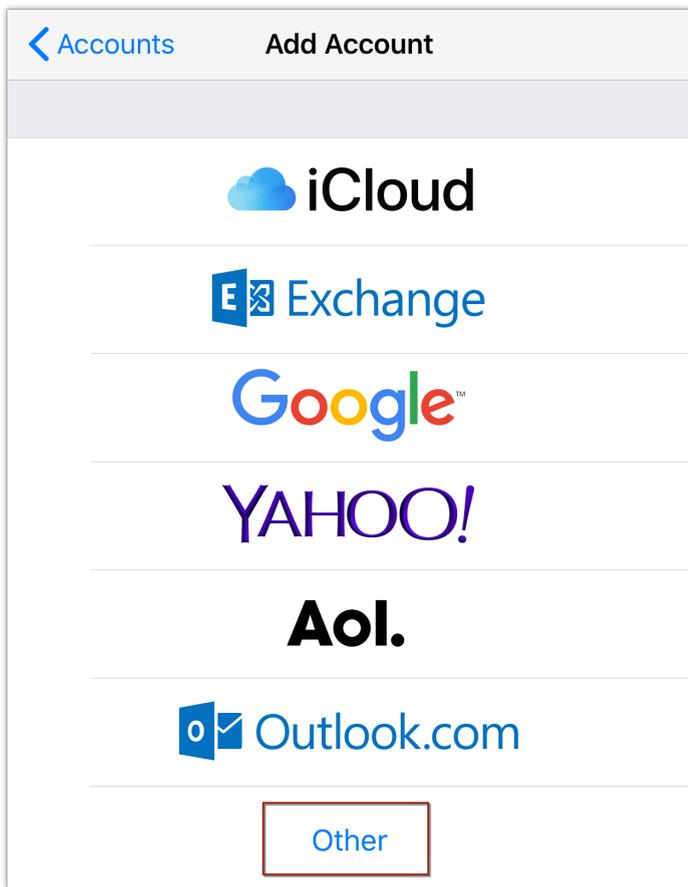
1. Tap **Settings** on your iPhone.
2. In the *Settings* page, select **Passwords & Accounts**.



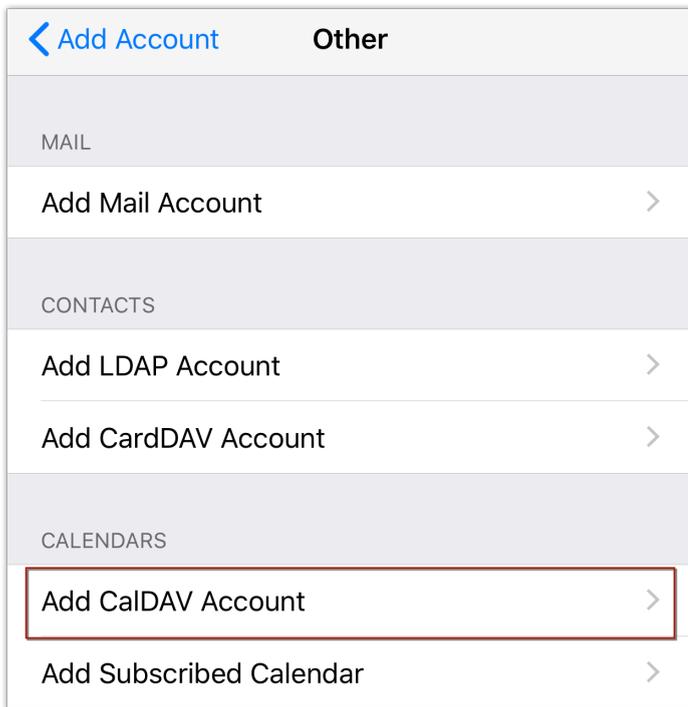
3. In the *Passwords & Accounts* page, under the *Accounts* section, tap **Add Account**.



4. In the *Add Account* page, tap **Other**.



5. In the *Other* page, under the *Calendars* section, tap **Add CalDAV Account**.



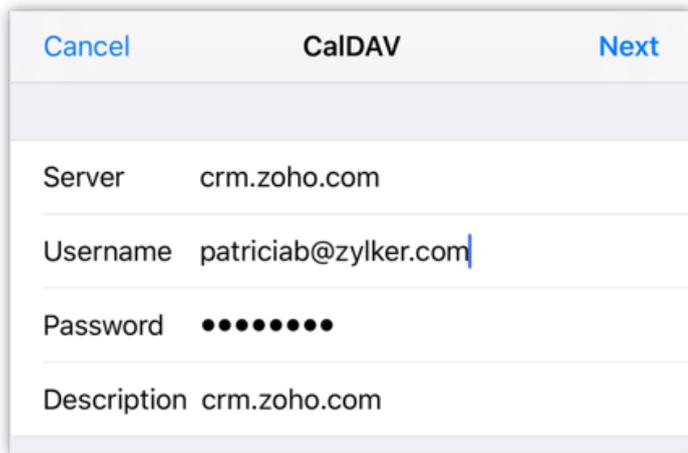
6. In the *CalDAV configuration* page, enter the following values.

7. **Server:** crm.zoho.com

8. **Username:** Zoho email address

9. **Password:** Zoho password

10. **Description:** Your choice of Application Name



The screenshot shows the 'CalDAV' configuration screen. At the top, there are three buttons: 'Cancel' on the left, 'CalDAV' in the center, and 'Next' on the right. Below the header, there are four input fields:

Server	crm.zoho.com
Username	patriciab@zylker.com
Password	●●●●●●●●
Description	crm.zoho.com

11. Your CalDAV configuration will be verified and enabled on your iPhone.



The screenshot shows the 'CalDAV' configuration screen with the 'Save' button. Below the header, there are two toggle switches:

	Calendars	<input checked="" type="checkbox"/>
	Reminders	<input checked="" type="checkbox"/>

## Note

- Make sure that you use your Zoho email address and NOT your Zoho username. If you use the username, the configuration will not work.
- If Two-Factor Authentication is enabled for your Zoho account, use your App-specific password for the CalDAV configuration.
- To generate the app specific password
  - Visit <https://accounts.zoho.com/u/h#home>
  - Click **Security > App Passwords > Generate New Password**.
  - In the *Application Specific Passwords* popup, enter required details and click **Generate**. The password thus generated is your application specific password and must be used for the CalDAV configuration in your iOS device.
- This CalDAV Configuration settings are applicable only when you setup CalDAV on iOS devices and not Android or Windows devices.
- If you wish to set up Calendar synchronization via CalDAV for your Android or Windows devices, please use third party apps to do so. When you use third party apps, please note that the *Server* address will differ. In such a case, please contact our Support team for the correct configuration settings.

## Delete CalDAV Account

If you do not want to have the CalDAV account in your iOS device any more, you can delete the account. You can delete the CalDAV account in two ways.

- Disable CalDAV Access in Zoho CRM
- Delete CalDAV Account on your iOS Device

### To disable CalDAV Access in Zoho CRM

1. Log in to your Zoho CRM account.
2. Click the *Calendar* icon, and then click **Day**, **Week** or **Month** to view your calendar.
3. Click **Options > Preferences**.

4. In the *Preferences* popup, under the *CalDAV Access* section, select **Status** as **Disable**.

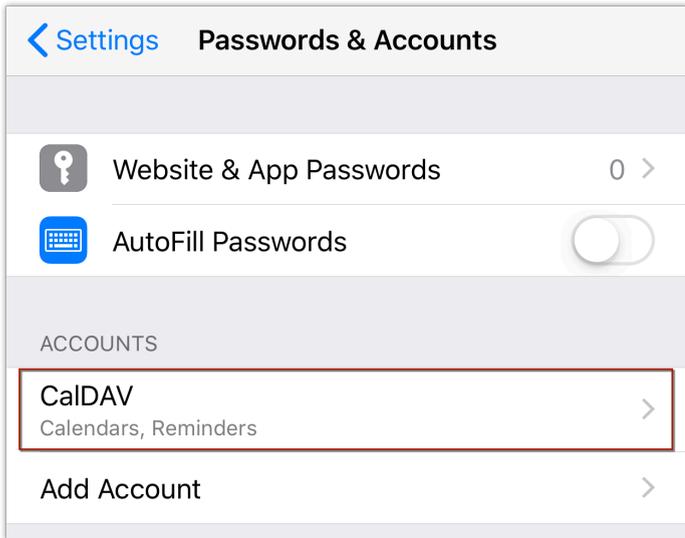
5. Click **Save**.

### To delete the CalDAV account on your iPhone (or any iOS Device)

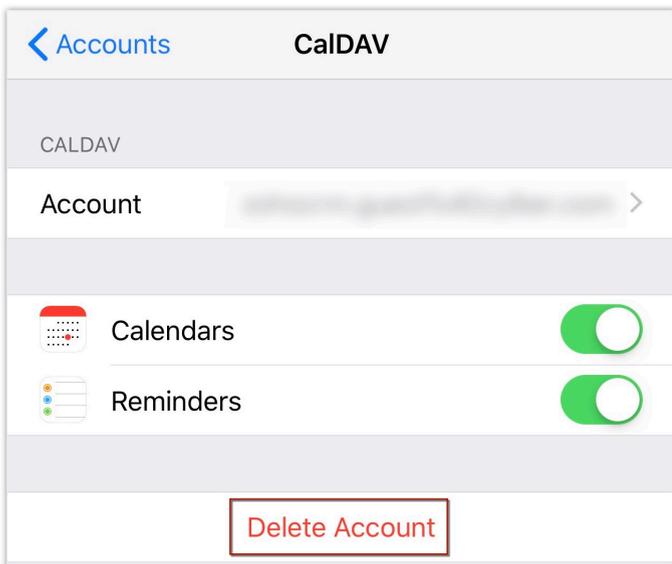
1. Tap **Settings** on your iPhone.

2. In the *Settings* page, tap **Passwords & Accounts**.

3. In the *Passwords & Accounts* page, tap **CalDAV**.



4. In the *CalDAV* page, tap **Delete Account**.



5. Tap **Delete from My iPhone**.

 **Note**

- On deleting the CalDAV account, all events created and synchronized in the iOS device under the associated CalDAV category will be removed.
- Events created and synchronized in Zoho CRM will remain intact.
- If you require CalDAV again, you can configure it once again in your iOS device.