Zoho Corporation

Using Calendar in Zoho CRM

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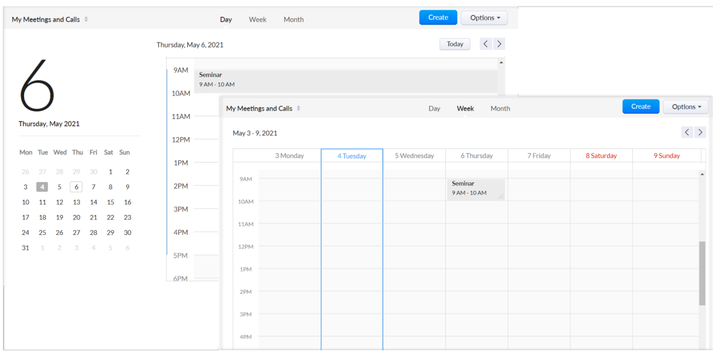
Knowing your calendar and the various components in it is helpful in planning all your meetings and scheduled calls efficiently. Following are some of the components in the Zoho CRM calendar that will help you understand the calendar better and make the best use of it.

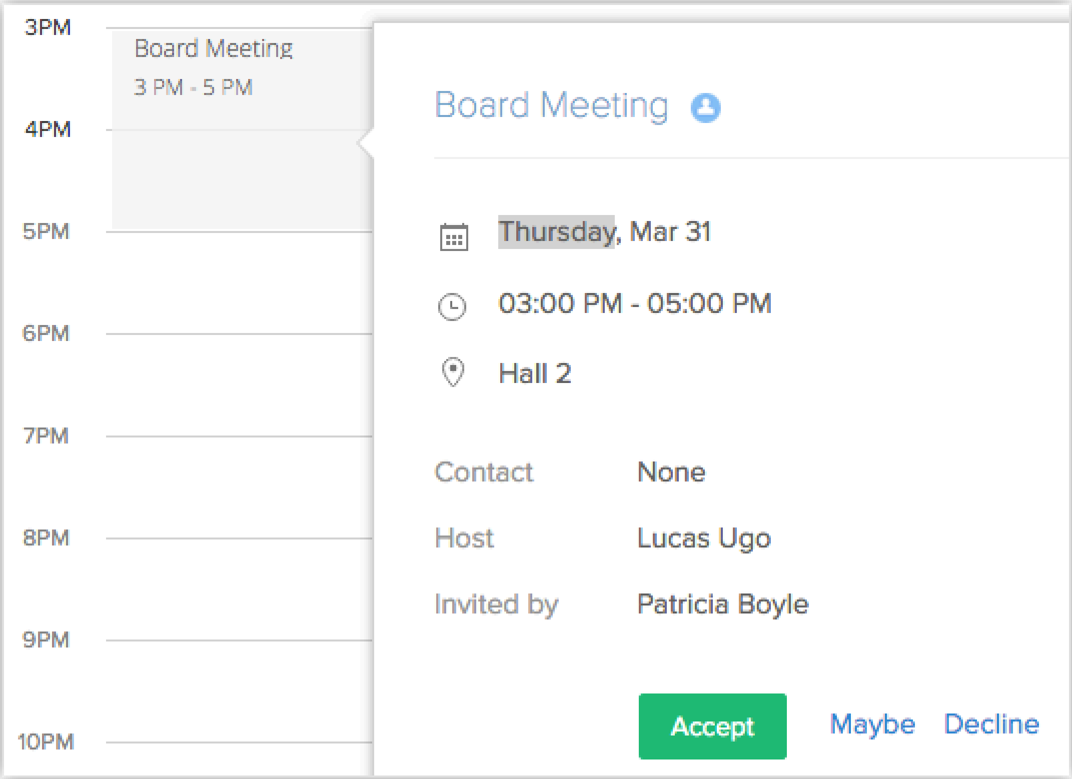
Day, Week and Month View

You have got the day, week and month view for your calendar and while viewing other user's calendar.



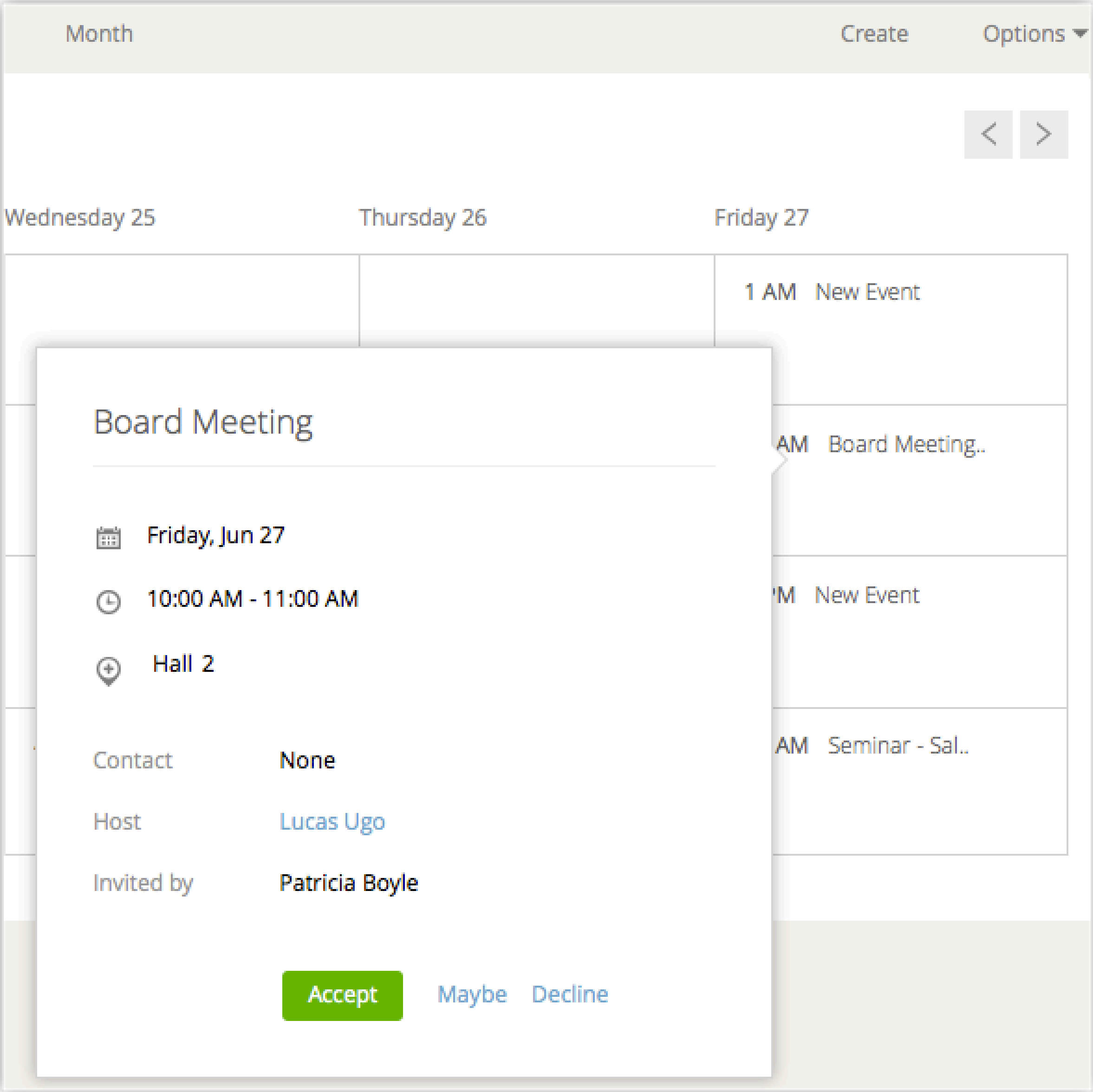
Pending Invitations

Check out the invitations that you are yet to respond to.



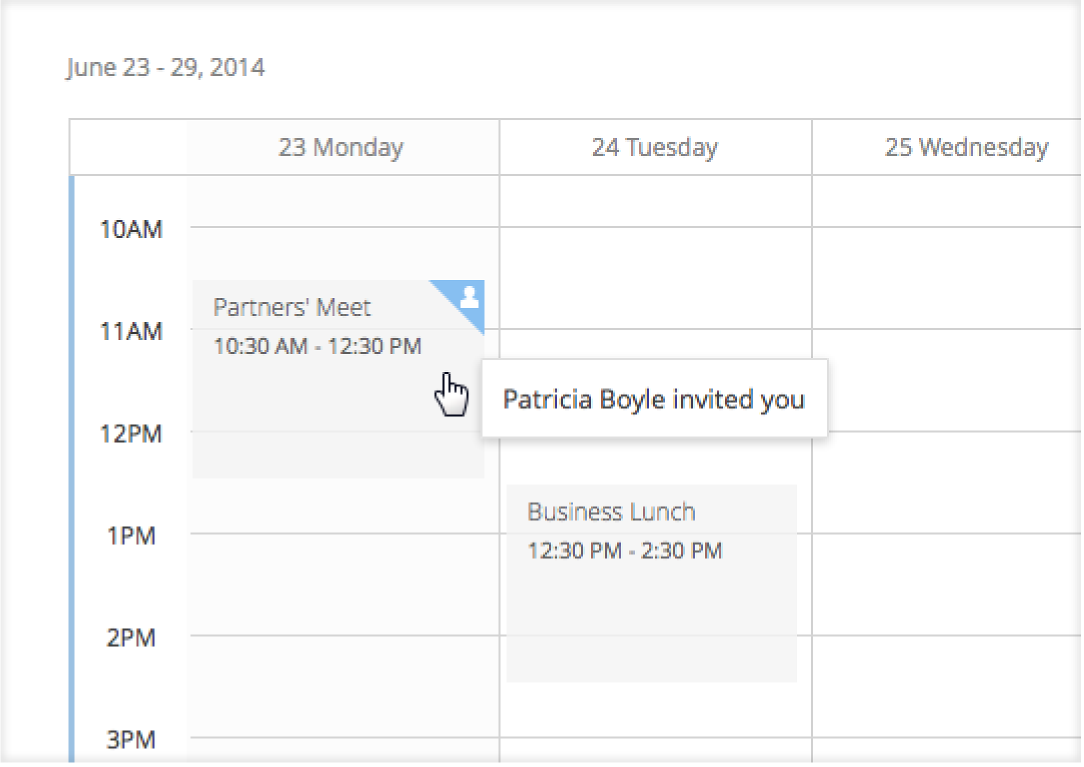
Accepting Invitations

Accept or decline meeting invitations in the calendar.



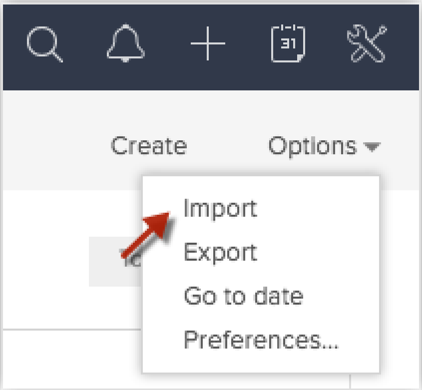
Invited Meetings

Invited meetings are separately marked in your calendar.



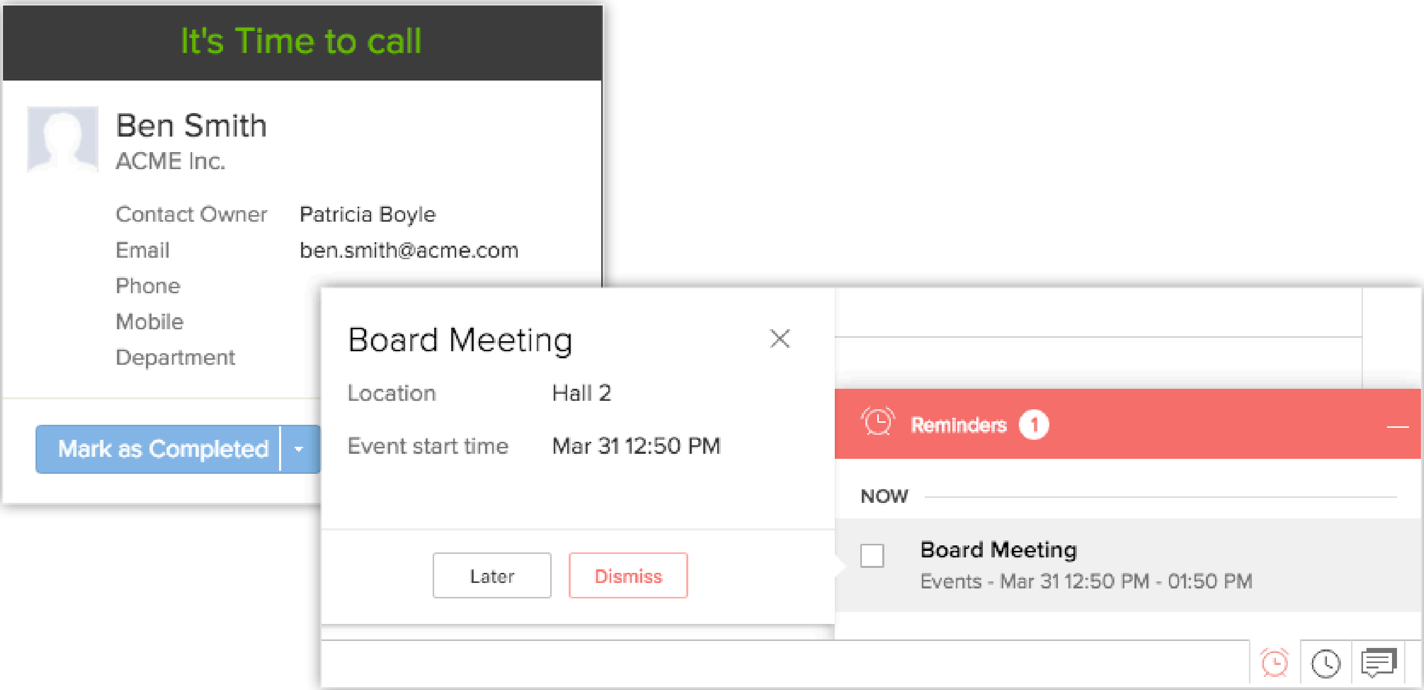
Importing and Exporting Meetings

Use .ics format files to import calendar meetings. Exported calendar meetings will also be available in .ics file.



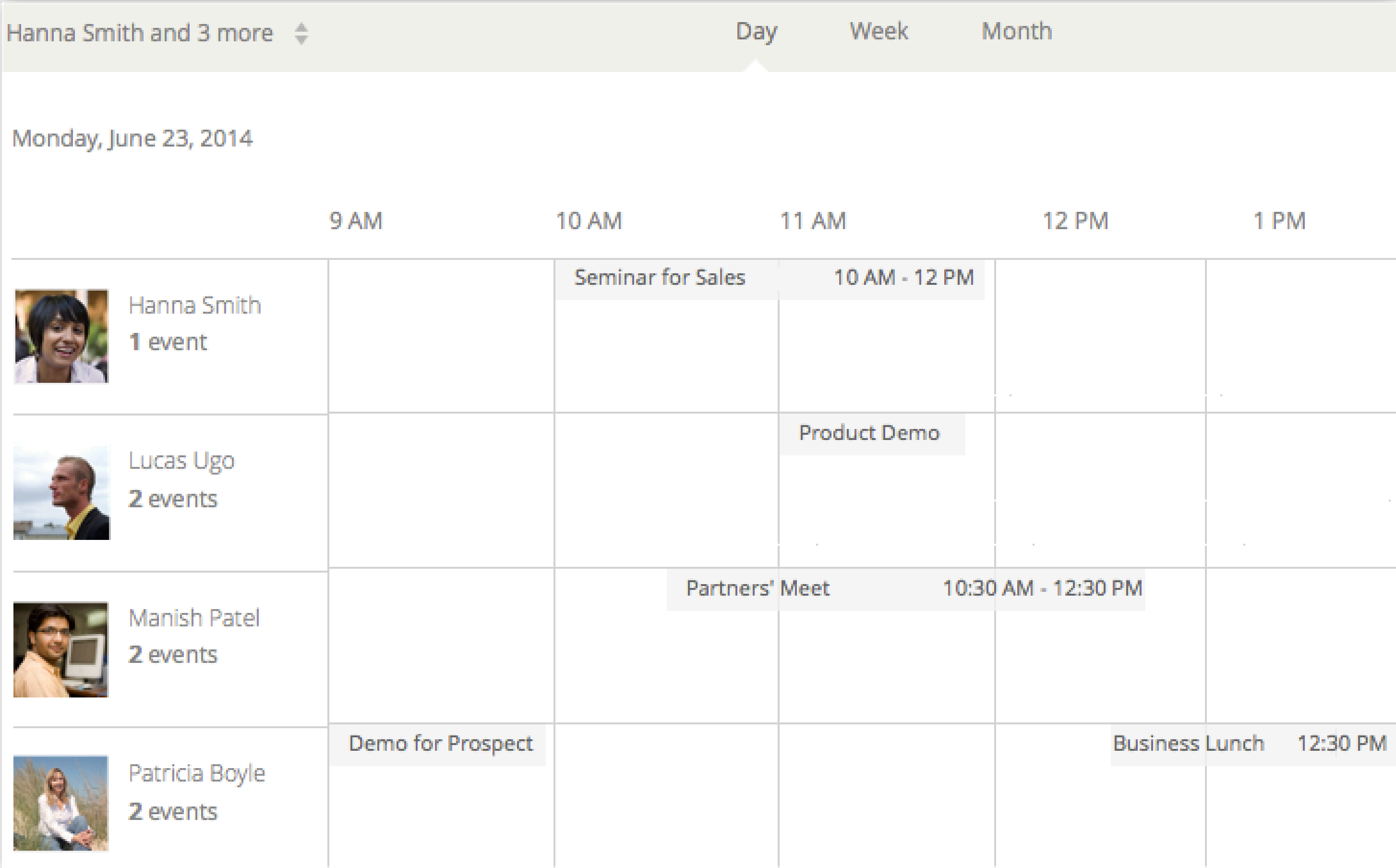
Reminders

Get reminders before the meetings starts and before the call.



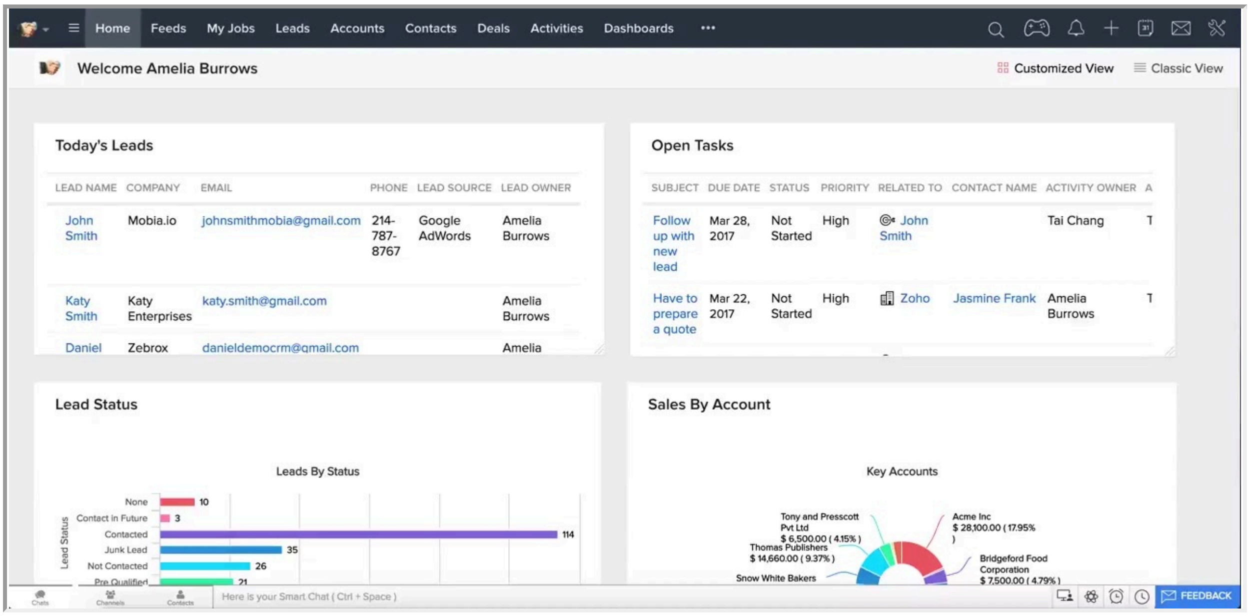
Other Users' Calendar

- Users with Administrator profile, can see all the user's meetings in the calendar.
- Users other than administrator profile can see the meetings of other users, if they have **Public Read/Write/Delete** or **Public Read Only** permission for the Activities module under *Data Sharing Settings* feature. This applies irrespective of the profile permission and role hierarchy. **See Also** [Setting up Data Sharing Rules]
- Others who do not have the above mentioned permission will be able to see other users' meetings as per the role hierarchy in Zoho CRM.
- Click on the **My Meetings & Calls** drop-down list and choose **All User's Meetings & Calls** to view other users' meetings.



Create Meetings

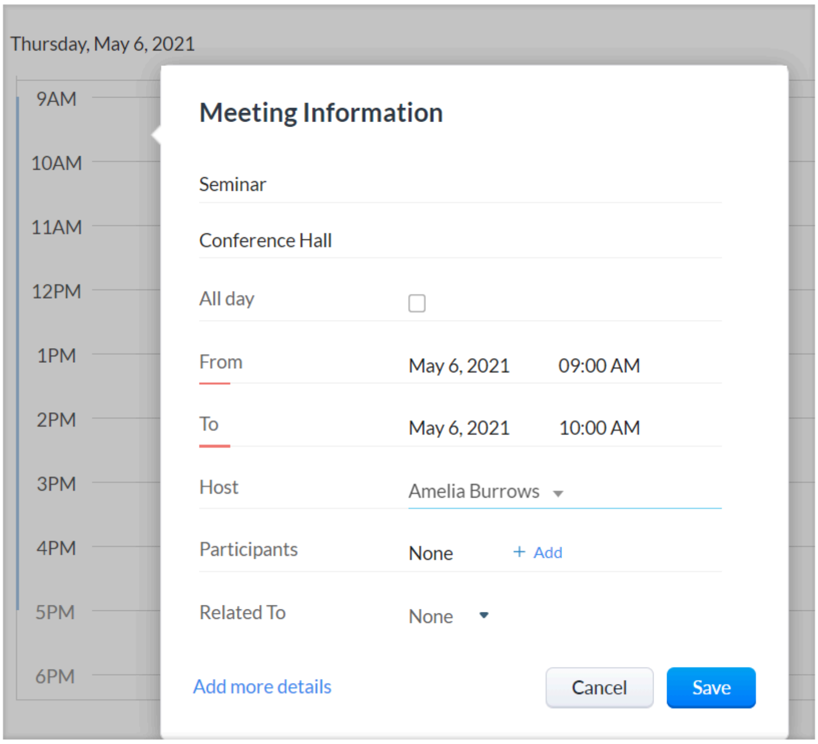
Creating meetings from within the calendar is quick and easy. You can either click the **Create** link or click on a date or time slot in the calendar to create meetings. Once created, these meetings will be available under the Activities tab also. By default, Zoho CRM provides the following fields while creating a meeting from the calendar.



- **Title** - Name of the meeting
- **Location** - Where the meeting is held
- **All day** - Is it an all day meeting
- **From & To** - Date and time of the meeting
- **Repeat** - When the meeting is schedules on a regular basis
- **Participants** - People invited for the meeting
- **Reminder** - A reminder for the meeting

The form that you fill in to add an meeting can be customized. You can add or remove fields in the form, except for the above mentioned default fields that are important for the record Additionally, you can also mark fields as mandatory. **See Also** [Edit Page Layout]()

To create meetings from calendar

1. Click the **Create** link in the calendar and select **Meeting**.
   You can also click on the date or time slot in the calendar and create meetings.
   

2. Specify the **Title** of the meeting and **Location**.
3. Select the **All Day** check box if you want to mark it as an all day meeting.
4. Select the **From** and **To** date and time.
   For an all day meeting, the option to set time is not available.

5. From the **Host** drop-down list, choose the name of a user who will host the meeting.
   The users listed in the **Host** drop-down will be based on your role hierarchy. The meeting will be created in the calendar of the user who is hosting the meeting.

6. Select **Leads**, **Contacts**, or **Other** modules to specify what the meeting is related to.

7. Click the **Change** link, if you want to schedule the meeting to repeat on a daily, weekly, monthly or yearly basis.
   By default the **Repeat** option is **None**.

8. Click the **Add** link, if you want to invite participants to the meeting. You can select contacts, leads, user, and users from roles, groups, territories, etc.
   By default the **Participants** option is **None**. You can also specify the email address of contacts that are not in your Zoho CRM account and invite them to the meeting.

9. Set a **Reminder** for the meeting.
   By default, when you create an meeting, the reminder settings will be set based on the calendar preferences of the user who is hosting the meeting. However, you can change that, if required.

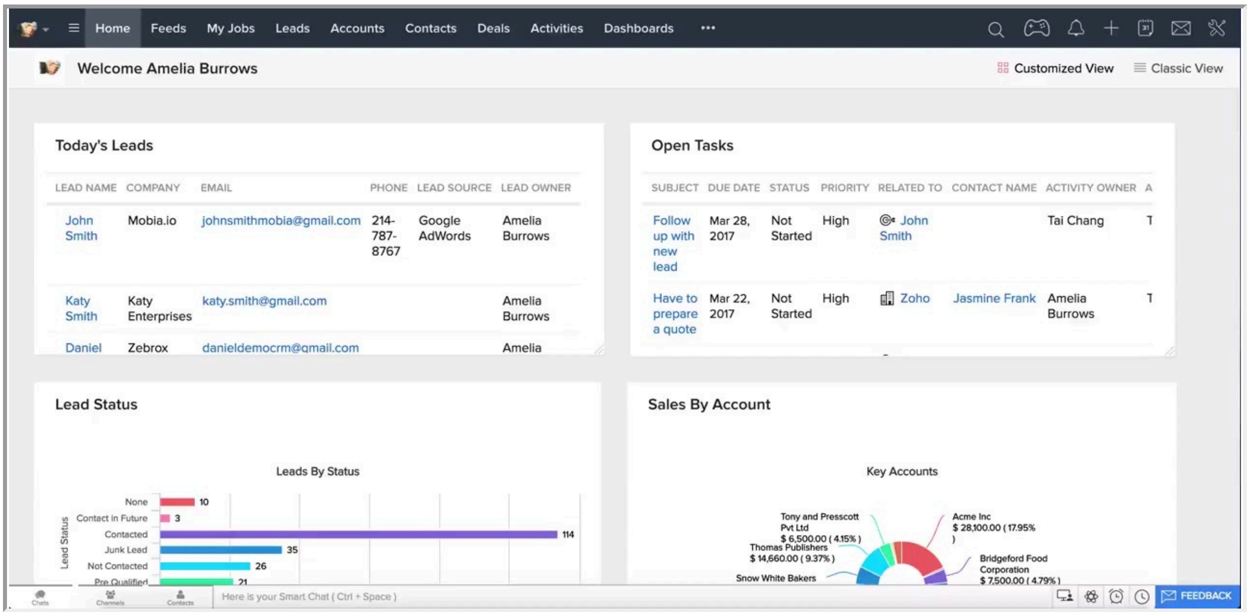
10. Click **Add more fields** if you need other fields to be populated to add more details about the meeting.

11. Click **Save**.

Note: Business Holidays and Shift Holidays cannot be used as dates to create meetings using Calendar. An error indicating the unavailability will be shown.

Schedule Calls

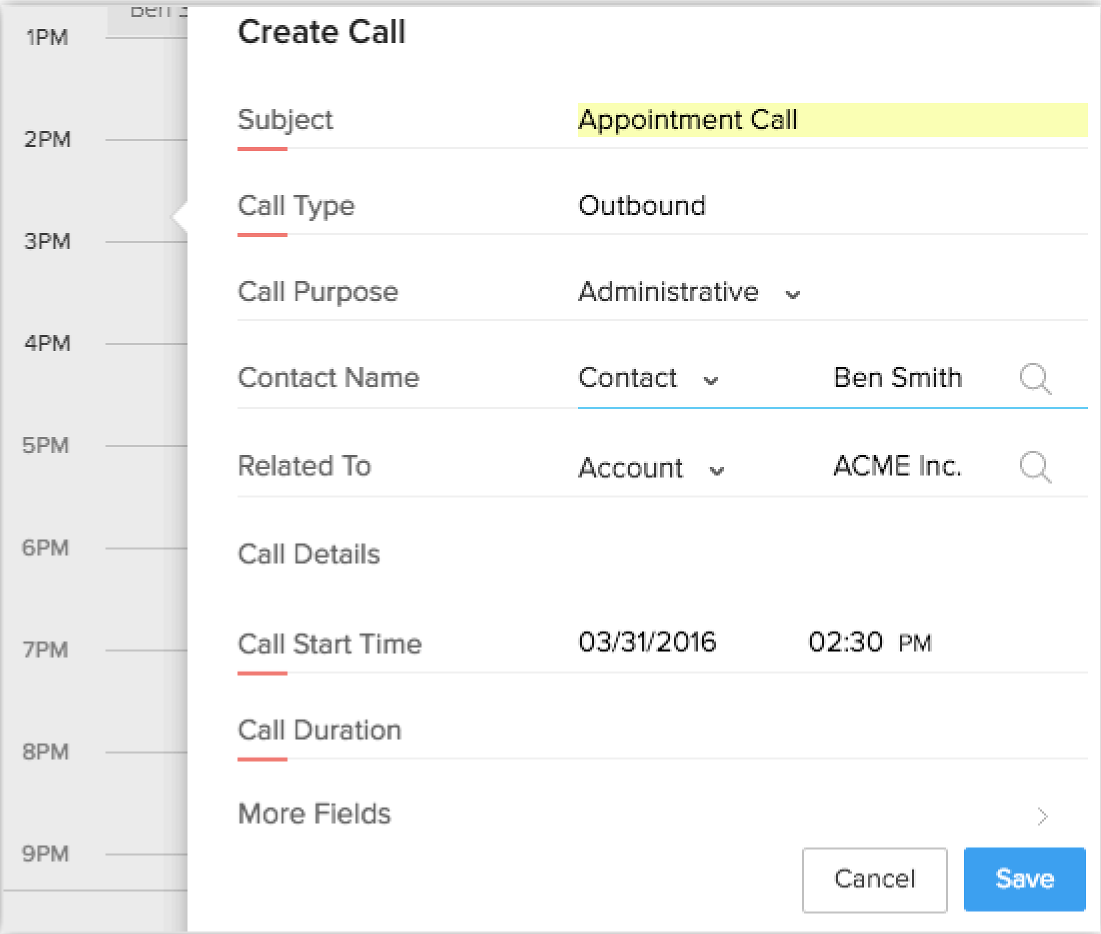
From within the calendar, you can schedule calls. You can either click the **Create** link or click on a future date or time slot in the calendar to schedule calls. Once created, these calls will be available under the Activities tab also. By default, Zoho CRM provides the following fields while adding a scheduled call from the calendar.



- **Subject** - Subject for the call.
- **Call Type** - By default it is Outgoing, as they are scheduled calls.
- **Call Purpose**- The purpose of the call such as negotiation, prospecting, demo, etc.
- **Contact Name** and **Related To** - Contact or other related record to the call.
- **Call Details** - This included the call date and start time.
- **Owner** - User who is the owner of the record or to whom the call is assigned.
- **Reminder** - A reminder for the call

To add scheduled calls from calendar

1. Click the **Create** link in the calendar and select **Call**.
   You can also click on the date or time slot in the calendar and add scheduled calls.



2. Specify the **Subject** of the call.
   By default the **Call Type** will be Outbound.

3. Select the **Call Purpose** from the drop-down list.

4. Select **Leads**, **Contacts**, or **Other** modules to specify what the call is related to.

5. Enter the call's date and start time details.

6. Select the **Owner** from the drop-down list.

7. Set a **Reminder** for the call.
   The reminder settings in the Calendar Preferences will not be taken into consideration as it is set for meetings only.

8. Click **Add more fields** if you need other fields to be populated to add more details about the call.

9. Click **Save**.

Note

- As per the role hierarchy, you will be able to access calendars of other users in the organization. You can add meetings/calls in their calendar too. When you create a meeting/call in your calendar, but choose another user as the host/owner of the record, the meeting will be added to host's/record owner's calendar.
- When you click on a meeting in the calendar, you can see some meeting details. These details can be customized in the *Page Layout Settings* so that in a quick glance, users can view only the details that are most important.
- You can view the meetings and calls in the Day, Week or Month view.
- When participants are invited for a meeting, you will have the option to first cancel the meeting, inform the invited people via email and only then will you be able to delete the meeting.

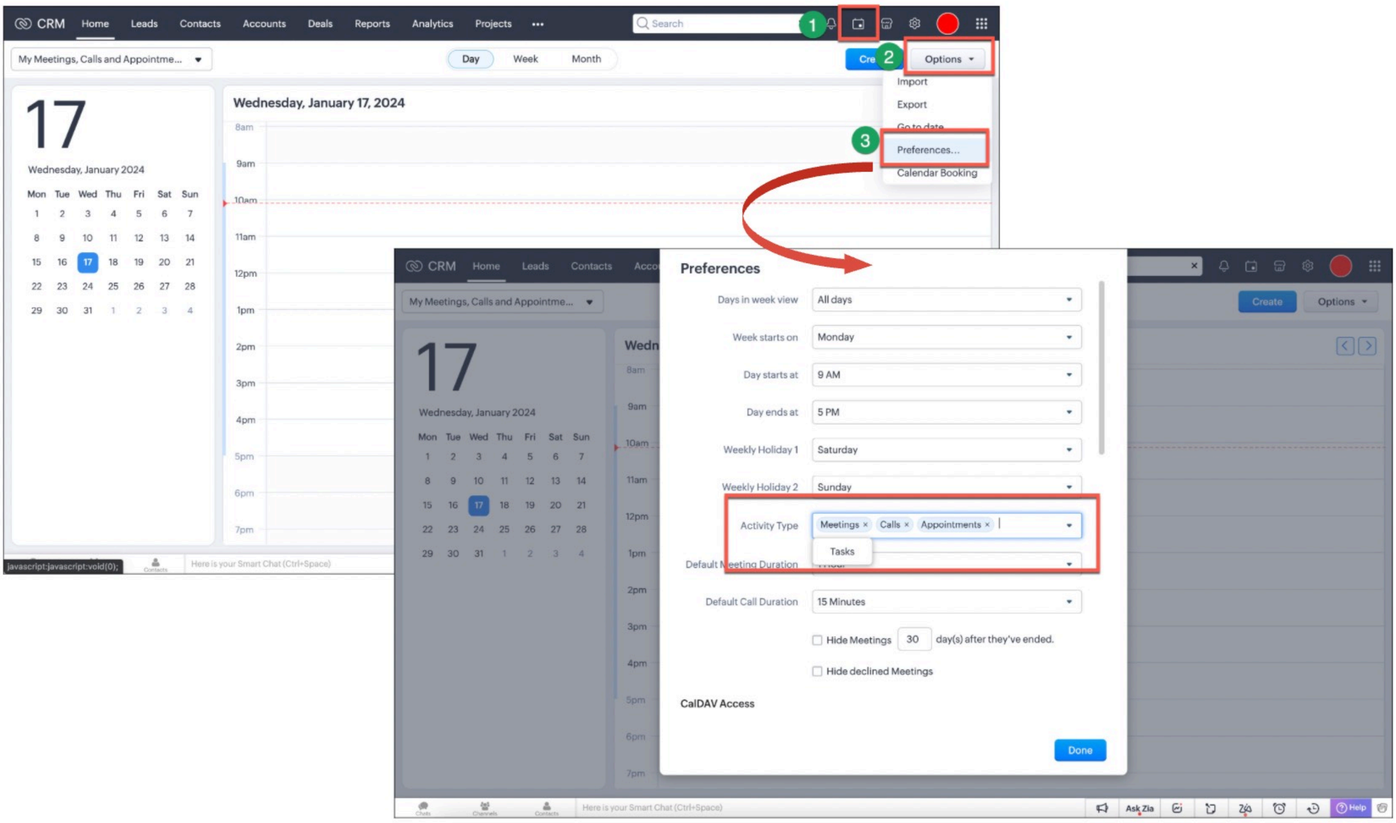
Task Inside Calendar

Effortlessly streamline your task management with CRM Calendar in CRM. Seamlessly integrate and prioritize tasks, collaborate with your team, and boost productivity with timely reminders, all within a unified platform for enhanced efficiency.

Enable Calendar Preference for tasks

1. Go to **CRM Calendar -> Options -> Preferences.**
2. In the Preferences pop-up, select **Tasks in the Activity Type** field.
3. Click **Done.**

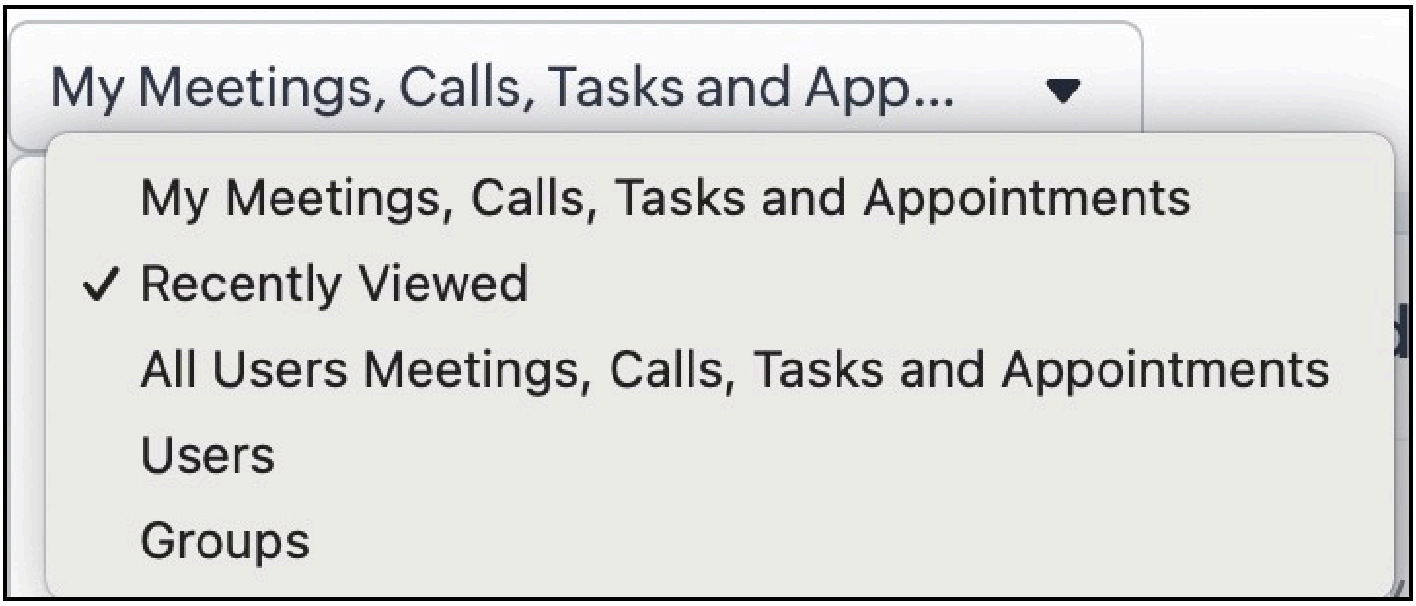
4. View the tasks in the calendar.



Tasks Views

You can view the tasks in the calendar based on the following five views:

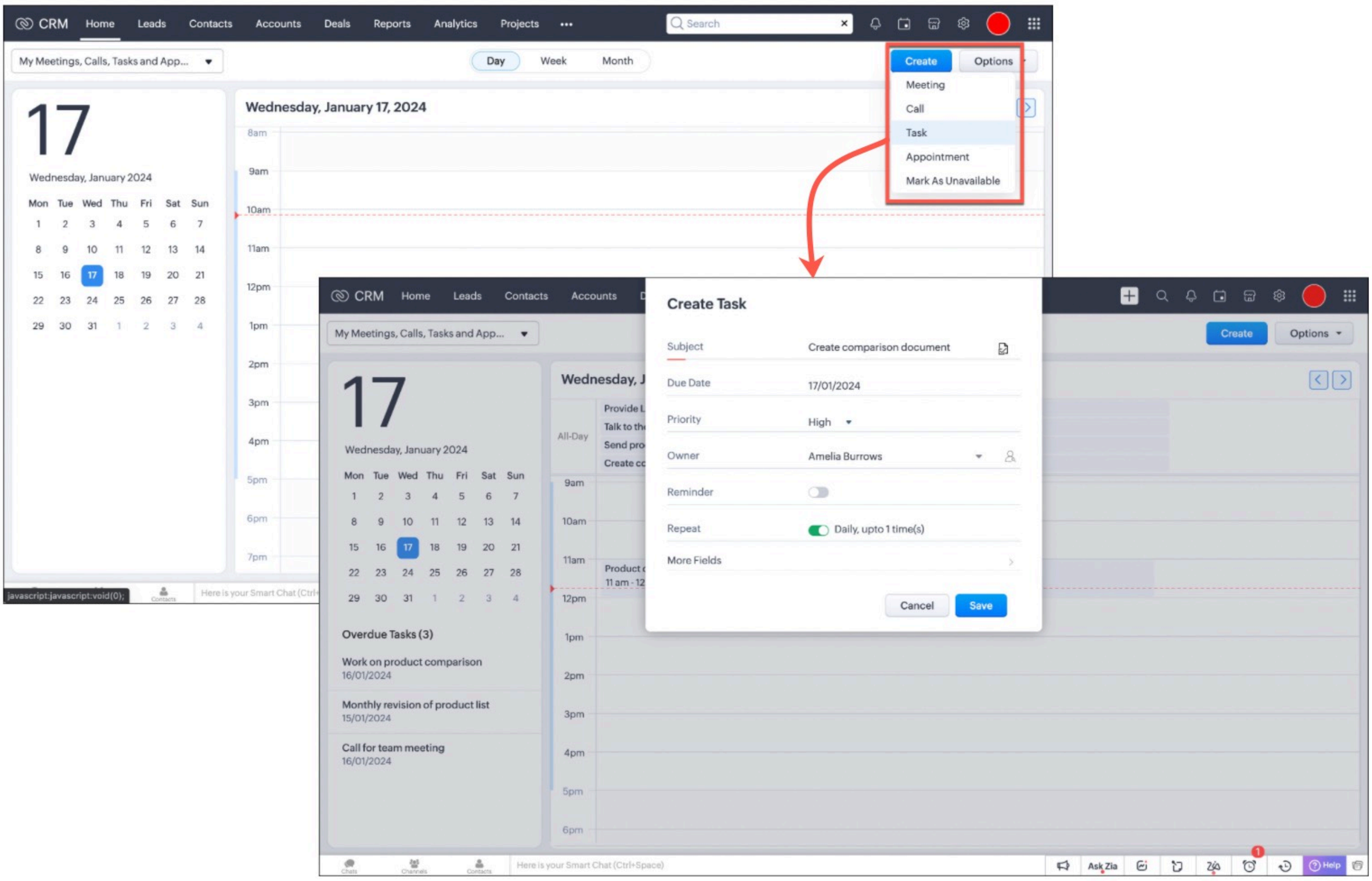
- My Meetings, Calls, Tasks and Appointments - Personalized productivity view for a focused display of your schedule.
- Recently Viewed - Track and revisit tasks for quick access to your most recent activities.
- All Users Meetings, Calls, Tasks and Appointments - Overall view for a collective perspective on team activities.
- Users - Focus on specific users, tailoring the display to your unique needs
- Groups - Organize tasks within dedicated Groups, optimising team efficiency and coordination.



Creating a task

To create a task

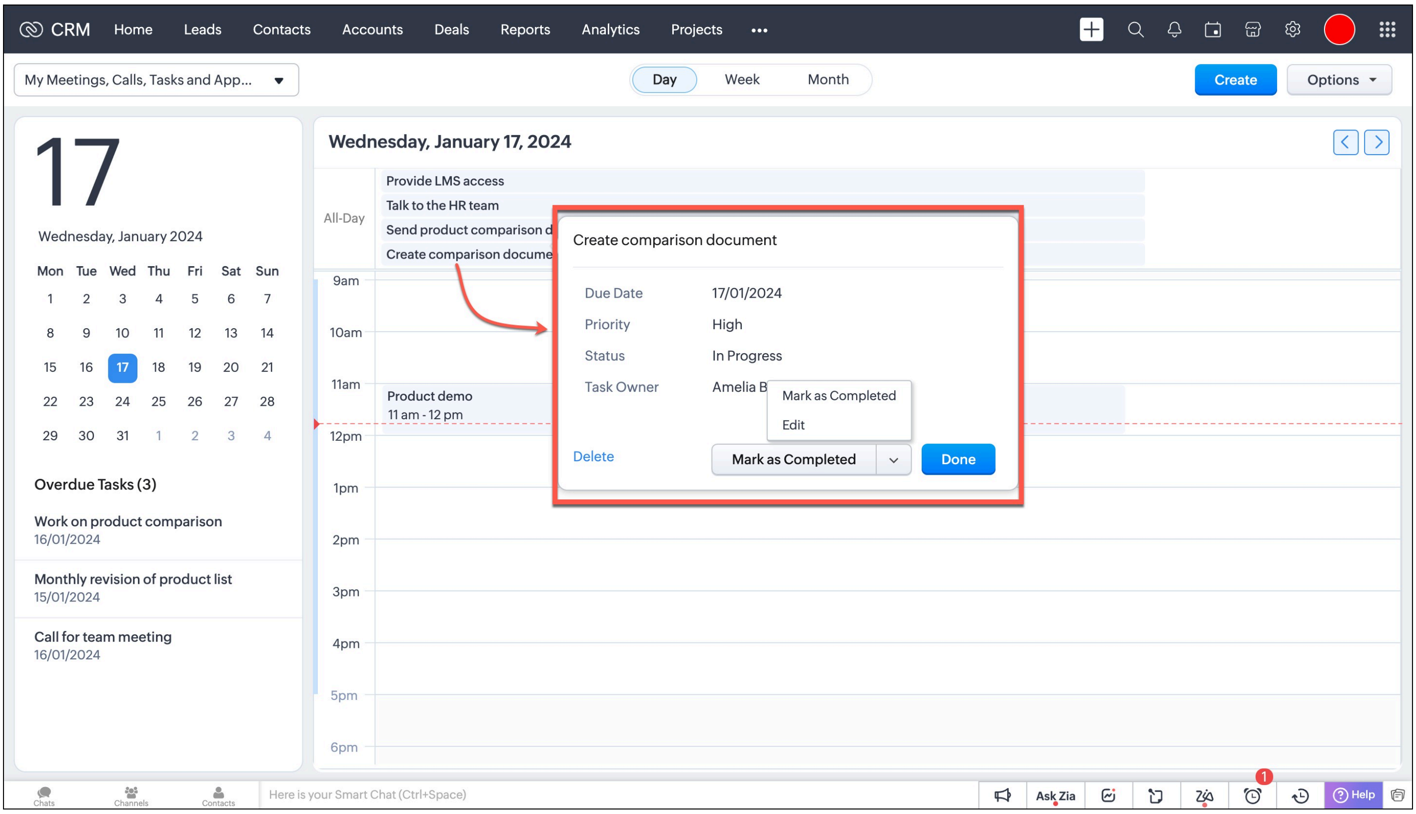
1. Go to **Create->Task.**
2. In the **Create Task** pop-up, enter the task details and click **Save**.



> **Note**: You can also click a date, week, or month and create a task apart from choosing Tasks from the Create option.

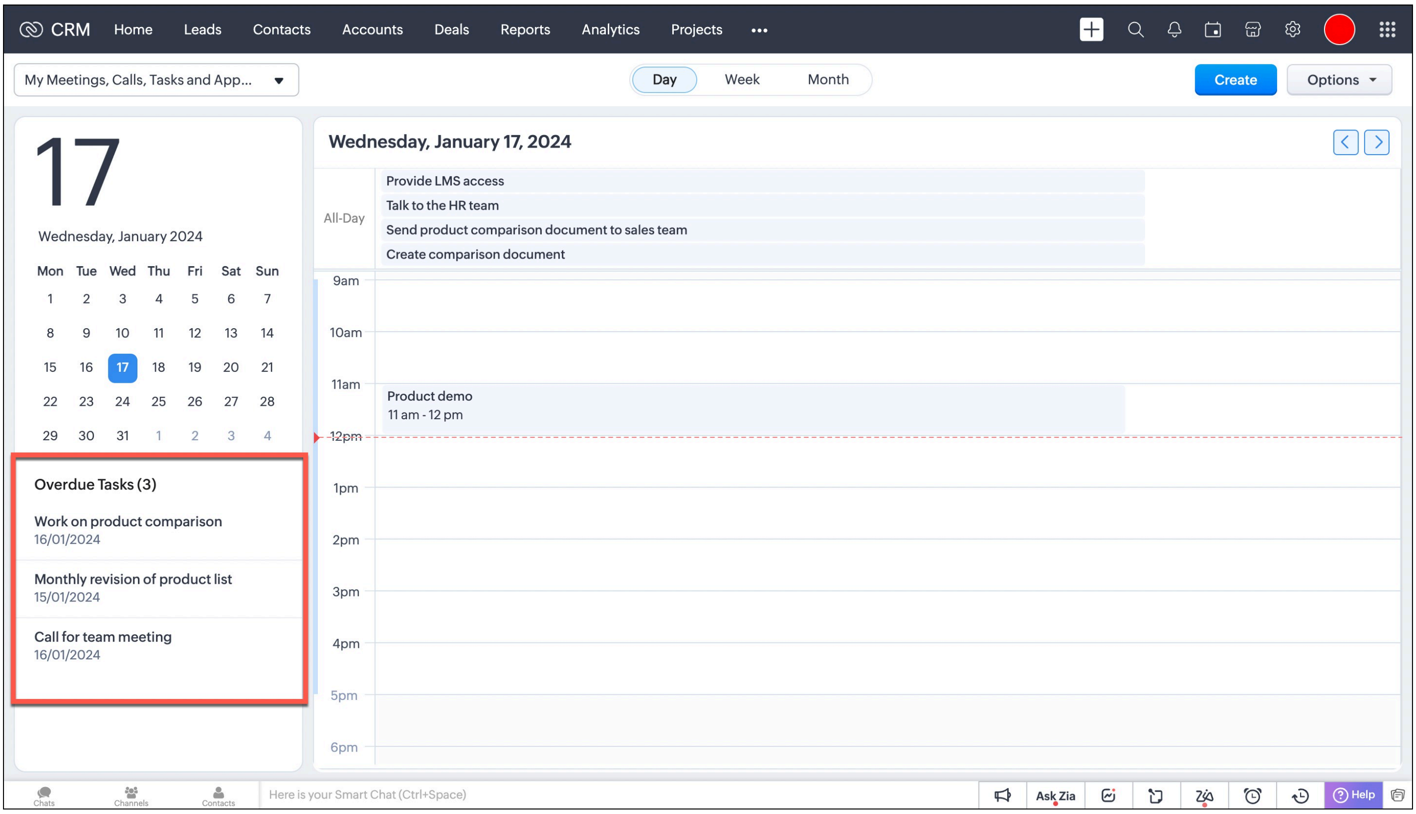
View the task details in Calendar

1. Click a task in the calendar.
2. View details, such as the due date, priority state, task owner, and description.
3. You can mark a task as completed by clicking **Mask as completed** on completion of the task.
4. Click **Edit** to edit the task details. You will be navigated to the Tasks module where you can make the required changes to the task. Refer to [this]() article to know more on how to create a task.
5. Click **Done**.

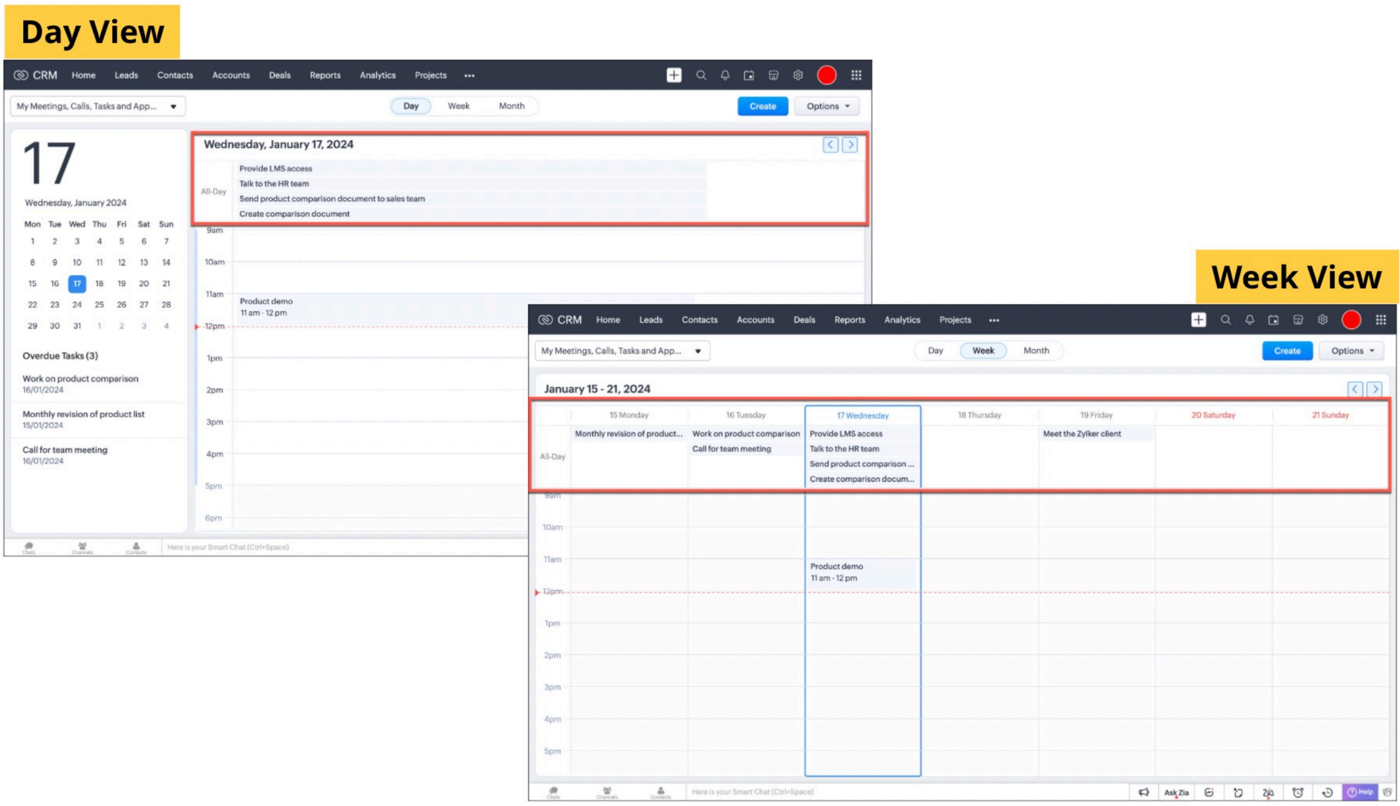


Single-user view

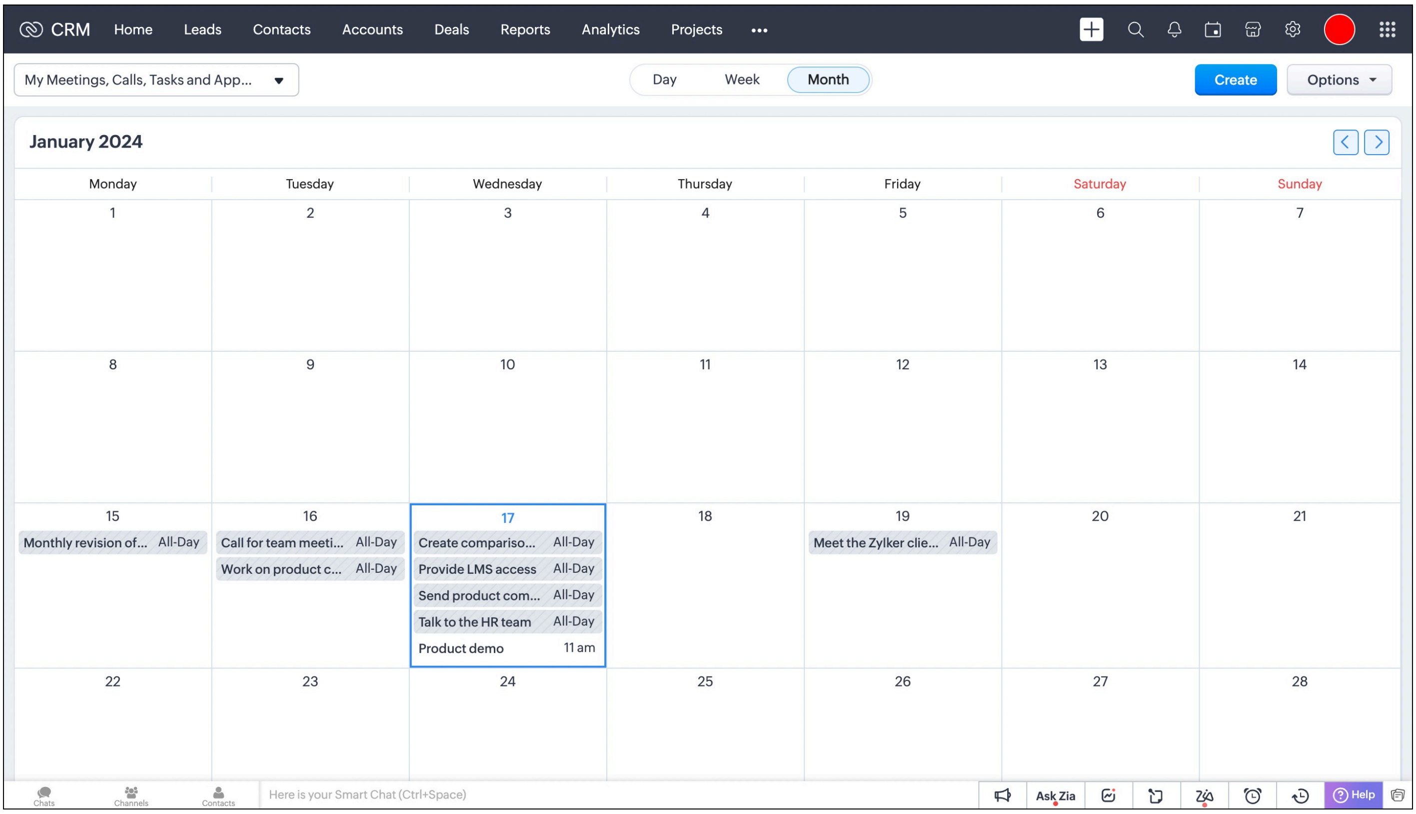
- You can view the Overdue tasks for the current date only, and not for past dates or upcoming dates.



- In the day view and week view, there is a special section called "All day".

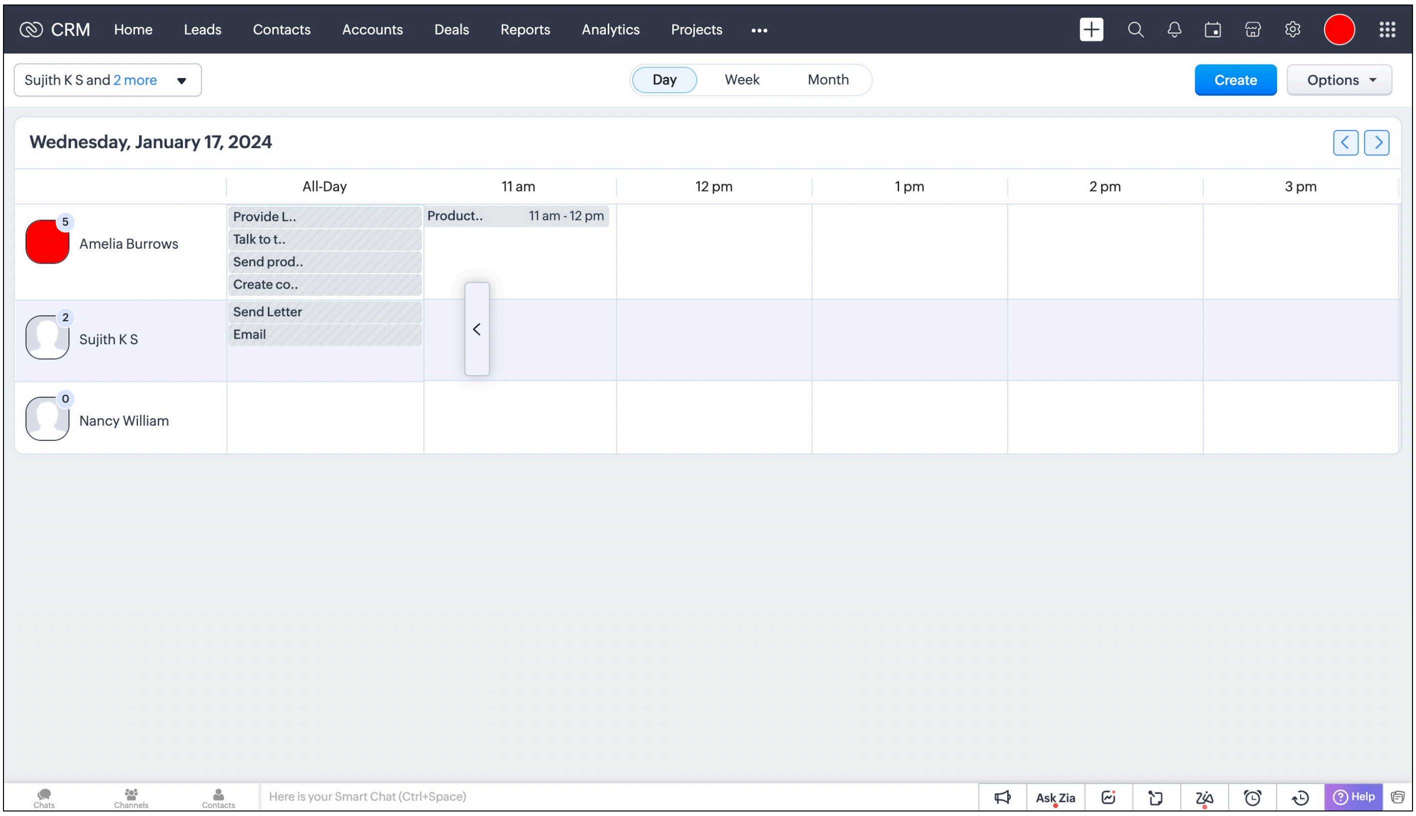


- The following is a single-user month view.

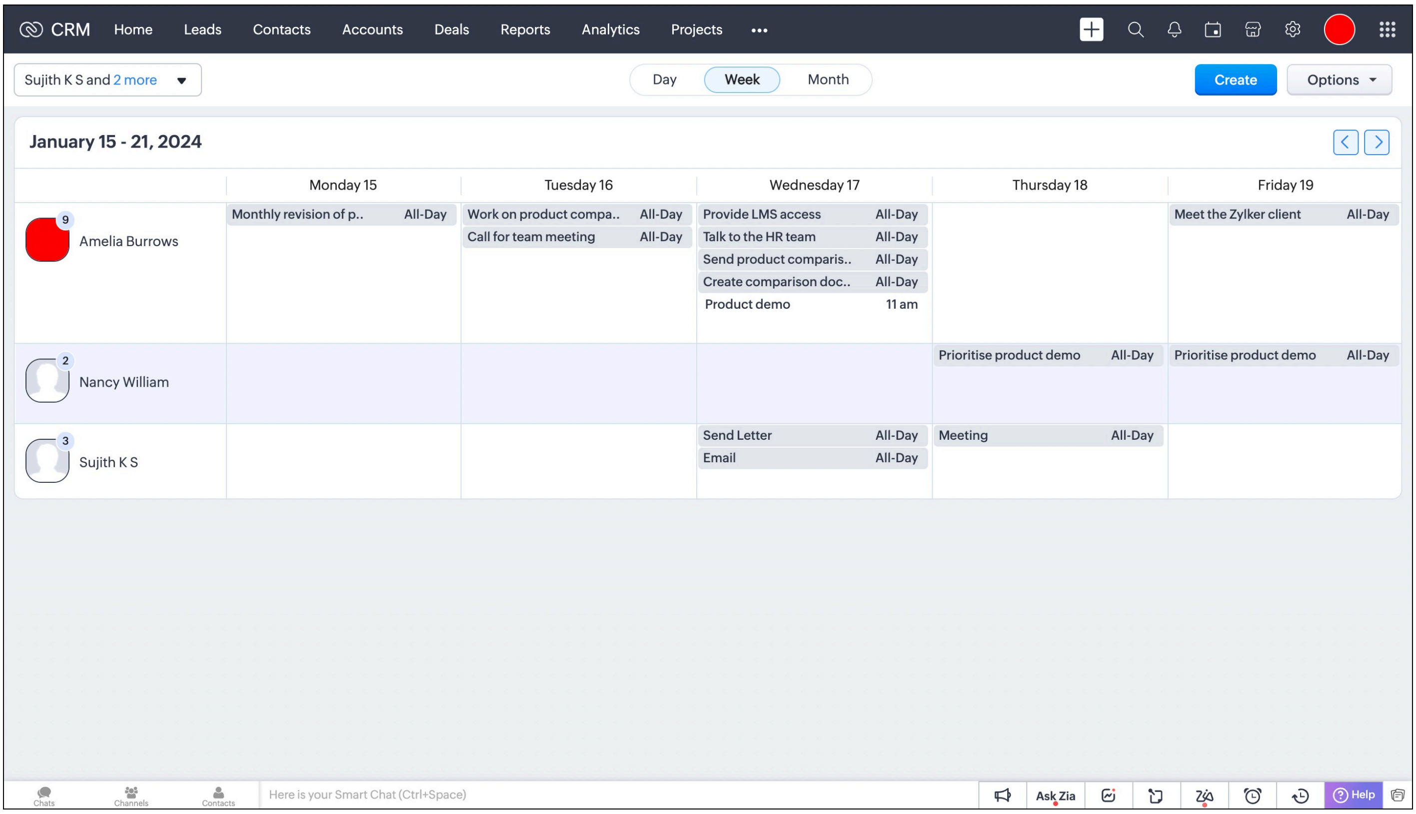


Multiple users view

- The "All day" section is available only for the day view.



- Multi-user week view - The "All day" section is not available.



- The tasks view is not supported in the month view.