



# Calendar

Schedule and manage appointments with your clients, contacts, and projects — all in one place.

## Key Features

- **Three Calendar Views:** Switch between Month, Week, and Day views to see your schedule at a glance or in detail.
- **Appointment Types:** Categorize appointments as Consultations, Site Visits, Meetings, Calls, Demos, Follow-ups, or Custom events.
- **Status Tracking:** Mark appointments as Scheduled, Confirmed, Completed, Cancelled, or No Show.
- **All Day Events:** Check "All Day Event" to create a full-day appointment without a specific time.
- **CRM Links:** Connect each appointment to an Account, Contact, and/or Project for full context.
- **Location Options:** Choose In Person (with address), Phone, Video Call, Google Meet, or Zoom — the form adapts to show the right fields.
- **Google Meet Auto-Link:** Selecting Google Meet automatically generates a meeting link when you save.

- **Zoom Integration:** Selecting Zoom automatically creates a Zoom meeting via your connected Zoom account.
- **Google Calendar Sync:** Appointments sync two-ways with Google Calendar — changes in either place stay in sync.
- **Color Labels:** Assign one of 8 colors to any appointment for quick visual identification on the calendar.
- **Reminders:** Set a reminder 15 minutes, 30 minutes, 1 hour, or 1 day before the appointment.
- **Project Timelines:** Active project date ranges appear as color-coded spanning bars across calendar weeks. Click any bar to jump directly to that project.
- **Project Events:** Project milestones appear on the calendar as distinct items, color-coded separately. Clicking them opens the related project.
- **Online Booking:** Share a public booking link so clients can self-schedule based on your availability rules.

## How to Use

### Viewing Your Calendar

1. Open the **Calendar** page from the sidebar.
2. Use the **Month / Week / Day** buttons to switch views.
3. Click the arrow buttons to move forward or backward in time, or click **Today** to return to the current date.
4. In Month view, click **+X more** on any day to switch to Day view and see all events for that date.

### Creating an Appointment

1. Click **New Appointment** — or click a day cell (Month view) or a time slot (Week/Day view) to pre-fill the date and time.
2. Fill in the title, type, status, and start/end times. Check **All Day Event** if no specific time is needed.
3. Optionally add a description and internal notes.
4. Link the appointment to an Account, Contact, or Project.
5. Choose a location type. Selecting **Google Meet** or **Zoom** will automatically create a meeting link when you save.
6. Pick a color and set a reminder if desired.
7. Click **Save Appointment**.

## Editing an Appointment

Click any appointment on the calendar to open it, update the details, and click **Save Appointment**.

## Online Booking

Share your public booking link with clients so they can self-schedule. Availability rules (hours, appointment duration, and buffer time between bookings) control when clients can book.

## Tips

- Use the **Week** or **Day** view to see exact appointment times side by side.
- Project timeline bars span across days automatically — click one to jump straight to that project.
- Project milestones appear as distinct items and also link back to their project.
- Linking appointments to Accounts and Contacts keeps your CRM activity log up to date.
- Click any empty time slot in Week or Day view to create an appointment already set to that time.
- Connect Google Calendar in **Integrations** settings to keep your schedule synced across both platforms.