CRM Calendar - Manage Tasks & Appointments from the Calendar

What Is the Calendar?

The Calendar provides a centralized view of all scheduled tasks and appointments.

It allows you to create, view, and manage tasks and appointments based on their scheduled date and time.

Calendar Views

Navigate to **Calendar**.

The Calendar provides three viewing options:

- Month View
- Week View
- Day View

Day View displays tasks and appointments based on their scheduled time during a specific day.

Week View displays tasks and appointments scheduled throughout the week.

Month View displays all scheduled tasks and appointments within the selected month.

Create a Task

1. Click **Add Task**.

The Add Task window will appear.

2. Select the lead.
3. Enter the task title.
4. Select the task type.
5. Select the task date and time.
6. Configure the reminder settings.

7. Enable **Repeat Event** if required.
8. Select the repeat schedule, such as Daily, Weekly, Monthly, or Yearly.
9. Specify when the recurring task should end.
10. Click **Save**.

The task will be created successfully and displayed on the Calendar.

Create an Appointment

1. Click **Add Appointment**.

The Add Appointment window will appear.

2. Select the lead.
3. Enter the appointment title.
4. Enter a description.
5. Specify the location.
6. Select the appointment date.
7. Select the start time.
8. Select the end time.
9. Configure the reminder settings.
10. Click **Save**.

The appointment will be created successfully and displayed on the Calendar.

View Calendar Items

Locate the task or appointment using its scheduled date and time.

Click the task or appointment.

The details will be displayed.

You can view information such as:

- Title
- Description
- Date and Time
- Status

Manage Tasks

Open the desired task from the Calendar.

You can perform the following actions:

- Mark as Complete
- Edit
- Delete

Mark as Complete

Click **Mark as Complete**.

The task status will be updated to Completed.

Note: The **Mark as Complete** option is only available for overdue tasks. Tasks that have not yet reached their scheduled date and time cannot be marked as complete.

Edit a Task

Click **Edit**.

Make the required changes.

Click **Save**.

Note: If the date or time of an existing task is modified, the updated task will be treated as a new scheduled task and will appear on the Calendar based on the newly selected date and time.

Delete a Task

Click **Delete**.

Confirm the deletion.

The task will be removed successfully.

Manage Appointments

Open the desired appointment from the Calendar.

You can perform the following actions:

- Edit
- Delete

Appointments do not include a Mark as Complete option.

Edit an Appointment

Click **Edit**.

Make the required changes.

Click **Save**.

Delete an Appointment

Click **Delete**.

Confirm the deletion.

The appointment will be removed successfully.

You have successfully learned how to use the Calendar in AgentRoof CRM.

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