Calendar

Schedule and manage appointments with your clients, contacts, and projects — all in one place. ACME Creative Agency's upcoming calls, site visits, and project milestones all appear here in a single unified view.

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. Each type has its own automatic color and icon for instant recognition.

- **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. Virtual options reveal a meeting link field — Google Meet and Zoom can generate that link automatically when those integrations are connected.
- **Google Calendar Sync**: Two-way sync with Google Calendar keeps changes in both places up to date automatically.
- **Color Labels**: Override the default type color with one of 8 colors for quick visual identification.
- **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 the calendar. Click any bar to jump directly to that project.
- **Project Milestones**: Project milestone events appear as distinct calendar items, also linking back to their 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 **Calendar** 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** reveals a meeting link field — the link is generated automatically on save when those integrations are connected.
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 — working hours, appointment duration, and buffer time between bookings — control when clients can book.

Tips

- Use **Week** or **Day** view to see exact appointment times side by side. Both views automatically scroll to 8 AM so your working hours are front and center.
- Project timeline bars span across days automatically — click one to jump straight to that 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 open a new appointment already set to that time.
- Connect Google Calendar under **Integrations** to keep your schedule synced across both platforms.