

Calendar Activity Creation

[Creating a Calendar Activity \[Video\]](#)

Find out how to manage your calendar information - [Here](#)

Activity Operation Feature

A new checkbox entitled "Sync to Integrated Calendar Provider" is now available. This checkbox is dynamic, meaning that if you select this checkbox it will sync the event back to the integrated calendar. The checkbox will differ depending on your integration. Note: the term "Integrated Calendar Provider" refers to either Outlook or Google Calendar. Whichever email provider you choose it will display. If the reverse or bi-directional sync option is not selected, the "Sync to [Calendar Provider] field" will not be displayed.

Activity Operations ☐ Share Activity ☐ All Day ☐ Send Notification
☒ Sync to Outlook Calendar

Notes

Maintain activity details using "Notes". A private note can be used to store private meeting information. This information will not be synced and will remain private. Underneath notes, you will see "Private will not be synced"

Note: this is the same field as the current "Details" it has been renamed.

Notes

File Edit View Format

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Private, will not be synced

Event Details

Share the key terms of the event information here. This information will sync and populate the email description or body of the email invite. It will say "Synced to [Calendar Provider]" where [Calendar Provider] is Outlook or Google

Take note: If the reverse or bi-directional sync option is not selected, the "Event Details" will not be displayed.

Event Details

File Edit View Format

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Synced to Outlook Calendar

