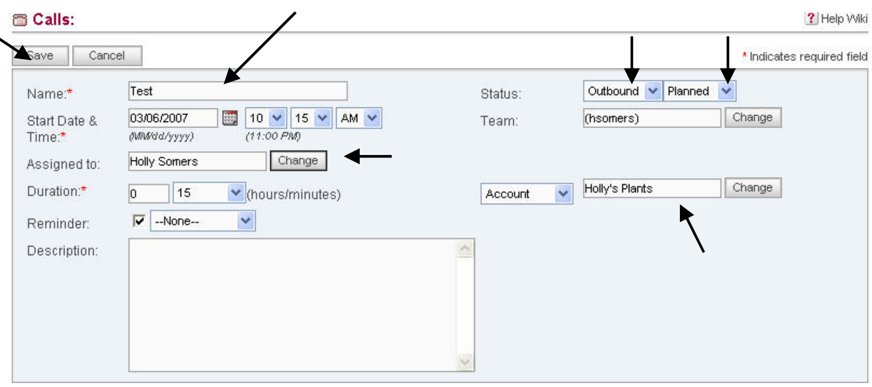
# Managing Calls and Meetings in CRM:

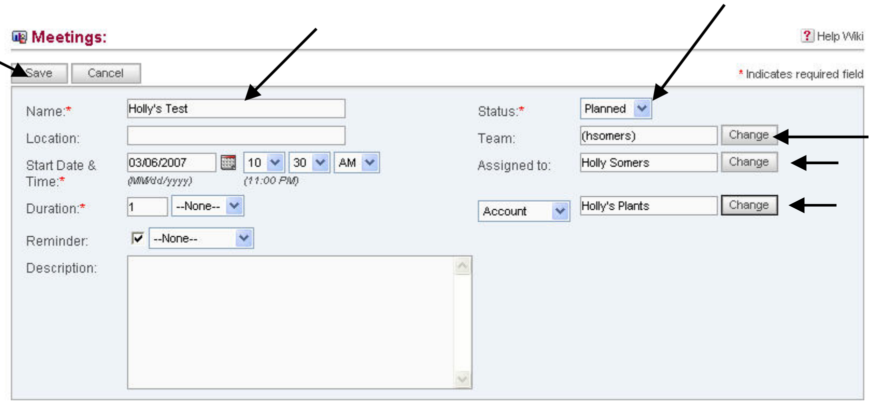
- **Scheduling a Call:**

1. **Click Activities** tab
2. Click Schedule call from shortcuts
3. **Enter Name** for call.
4. **Click Status** drop down and select options you want.
5. **Team** should be populated. Click Change to change team name.
6. **Click Change** and assign it to an Account
7. **Click Change** and select Assigned to
8. **Click Save**




- **Scheudling a Meeting**

1. **Click Activities** Tab
2. **Click Schedule Meeting** from Shortcuts
3. **Enter Name** for your meeting.
4. Select Status from drop down
5. **Team** should be auto populated. Click Change to change team.
6. **Click Change** and person for Assigned to
7. **Click Change** to assign meeting to an account.
8. **Click Save**




**Click Day, Week, Month or Year tabs to change the calendar view. Click Shared to share your calendar with other CRM users**

- **Viewing your Scheduled Calls and Meetings**:

1. Click Calendar Tab.
2. Your scheduled calls and meetings will be listed.
3. Your scheduled tasks are also displayed.