

Creating and Sharing Calendar Profiles

Updated: October 31, 2013

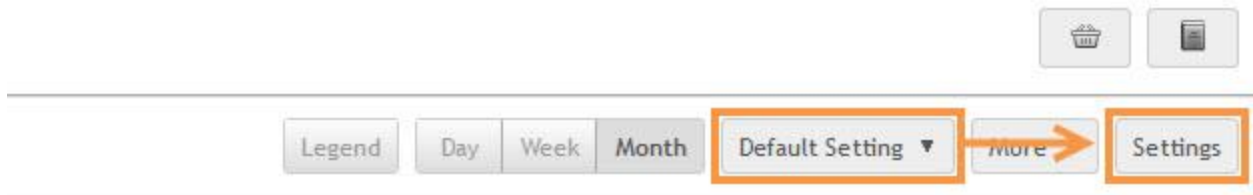
Calendar profiles are a convenient method to switch between different setting specifications. For example, you might want to be able to quickly switch between having your events colored by status or colored by calendar.

This document will walk you through creating common calendar profiles and sharing them with other users.

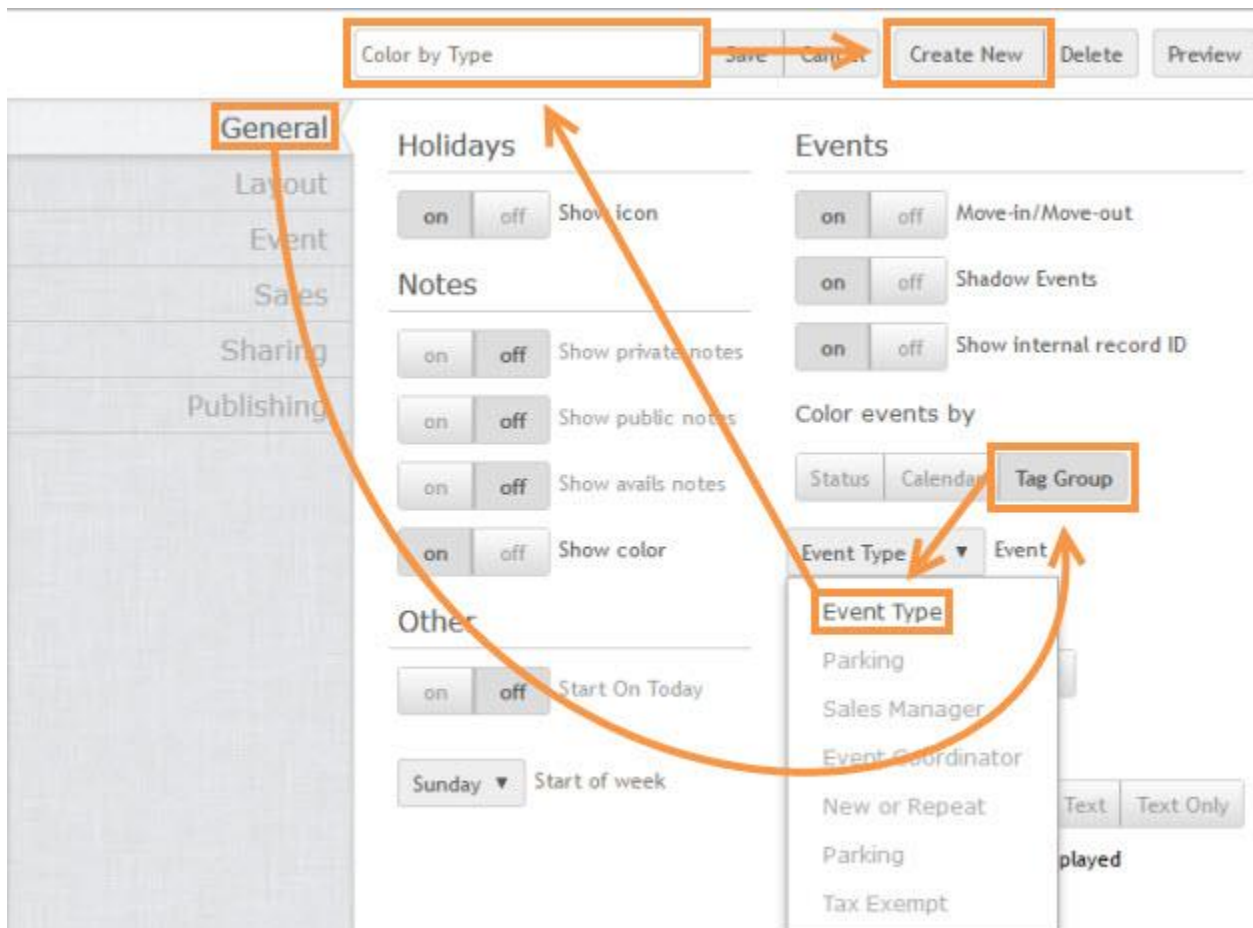
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Color Events by Type

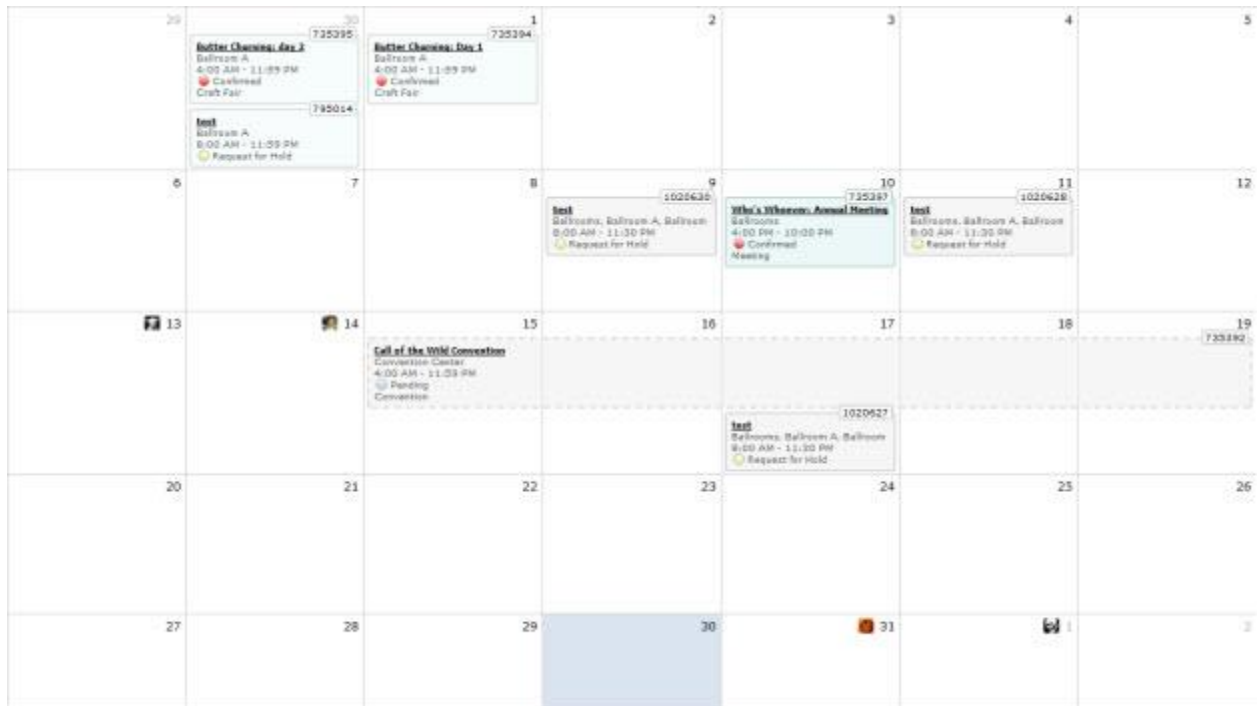
1. On the Calendars (new!) page, select a calendar profile to serve as a basis for your new profile. (If you have not previously created a profile and none have been shared with you, your only option will be **Default Setting**.)
2. Click **Settings**.



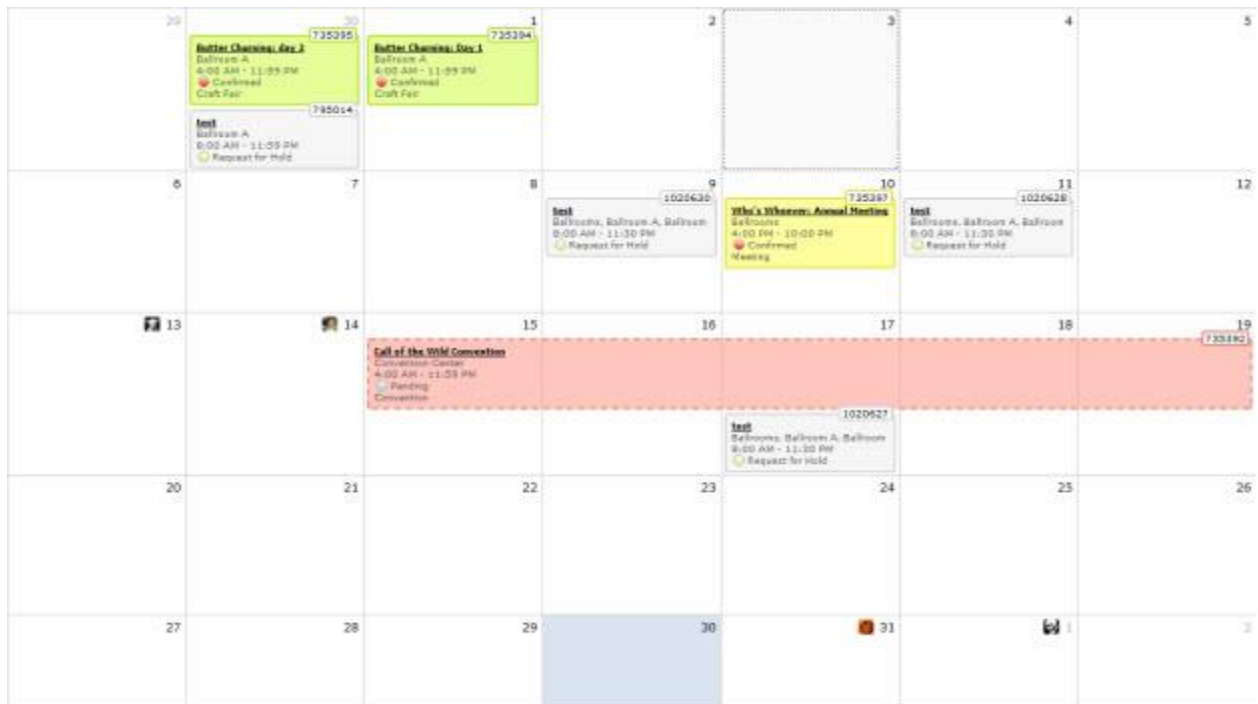
3. Click the **General** tab.
4. Click the **Tag Group** button under **Color events by**.
5. Select **Event Type** from the drop-down menu.
6. Type a name for the calendar profile.
7. Click **Create New**.



Colored by Calendar

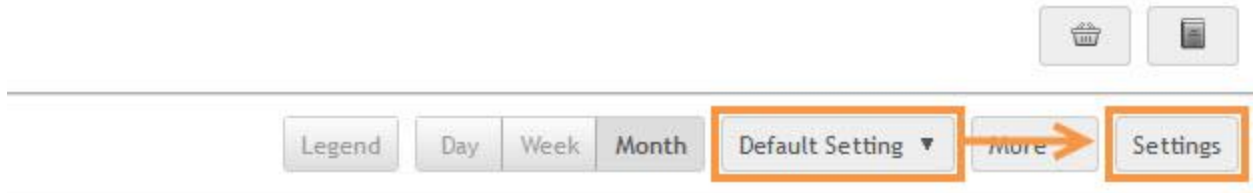


Colored by Event Type

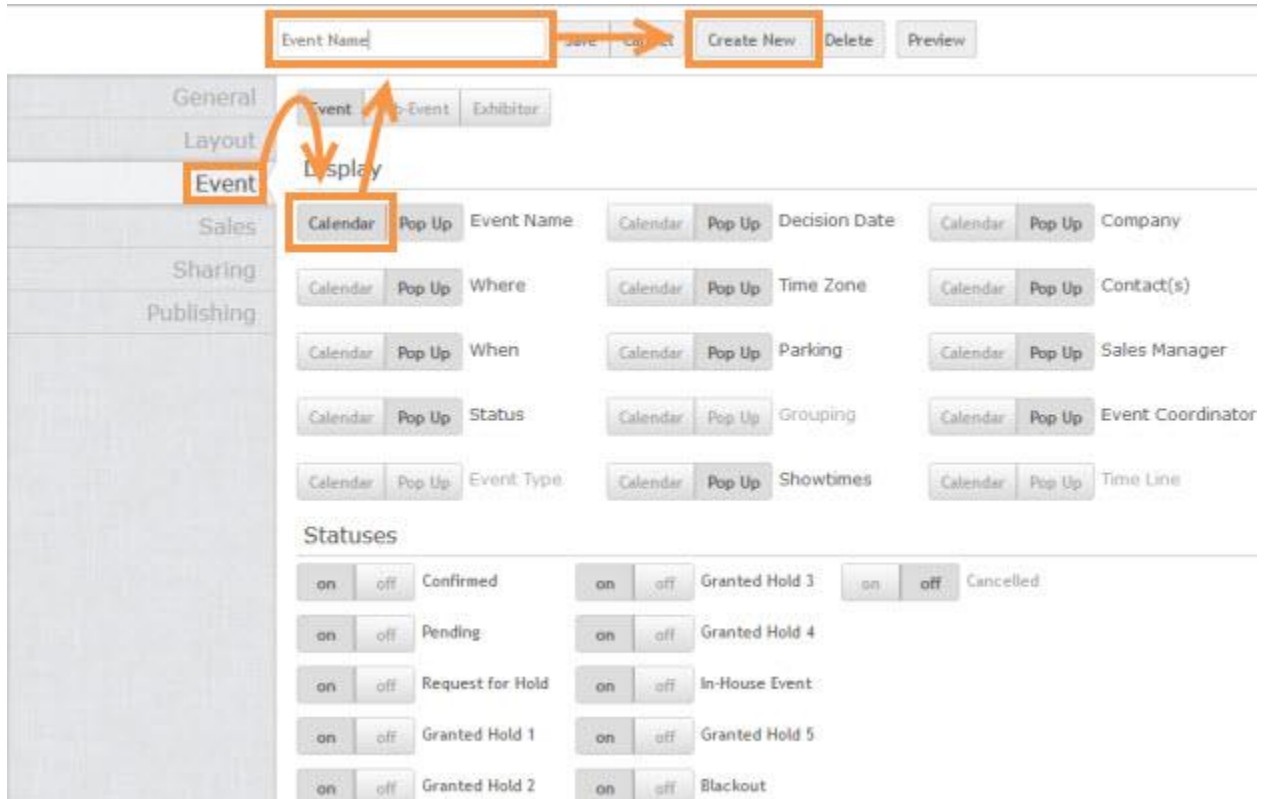


Event Name Only

1. On the Calendars (new!) page, select a calendar profile to serve as a basis for your new profile. (If you have not previously created a profile and none have been shared with you, your only option will be **Default Setting**.)
2. Click **Settings**.



3. Click the **Event** tab.
4. Make sure that only **Event Name** has its **Calendar** button selected.
5. Type a name for the calendar profile.
6. Click **Create New**.



Default Setting (with more information)

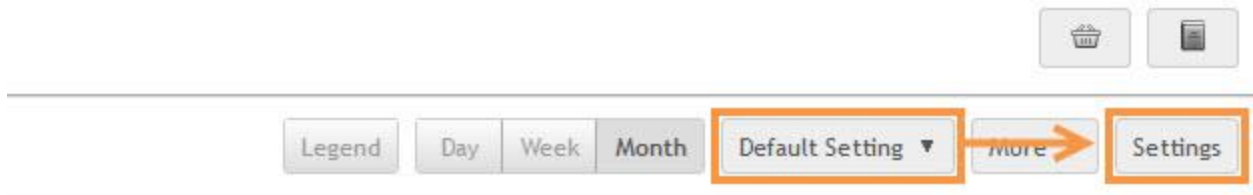
29	30	31	1	2	3	4
			Pottery Class Ballrooms 1:00 PM - 2:00 PM Granted Hold 1		Pottery Class Ballrooms 1:00 PM - 2:00 PM Granted Hold 1	
5	6	7	8	9	10	11
Pottery Class Ballrooms 2:00 PM - 3:00 PM Granted Hold 1	Test RRS Feed Ballrooms, Ballroom A, Ballrooms 4:00 AM - 11:00 PM Request for Hold	Breakfast Ballrooms 4:00 AM - 11:00 PM Confirmed		Pottery Class Ballrooms 2:00 PM - 3:00 PM Granted Hold 1		
12	13	14	15	16	17	18
Pottery Class Ballrooms 2:00 PM - 3:00 PM Granted Hold 1			Pottery Class Ballrooms 4:00 AM - 11:00 PM Granted Hold 1		Pottery Class Ballrooms 2:00 PM - 3:00 PM Granted Hold 1	
			Pottery Class Ballrooms 4:00 AM - 11:00 PM Granted Hold 1			
19	20	21	22	23	24	25
Pottery Class Ballrooms 2:00 PM - 3:00 PM Granted Hold 2			Meet the CEO Ballrooms A/B/C 7:00 AM - 11:00 PM Granted Hold 1 Meeting			
			Pottery Class Ballrooms 2:00 PM - 3:00 PM Granted Hold 2		Pottery Class Ballrooms 2:00 PM - 3:00 PM Granted Hold 2	
26	27	28	29	1	2	3
Pottery Class Ballrooms 2:00 PM - 3:00 PM Granted Hold 1		Pottery Class Ballrooms 4:00 AM - 11:00 PM Granted Hold 1	Pottery Class Ballrooms 4:00 AM - 11:00 PM Granted Hold 1			

Event Name (with less information)

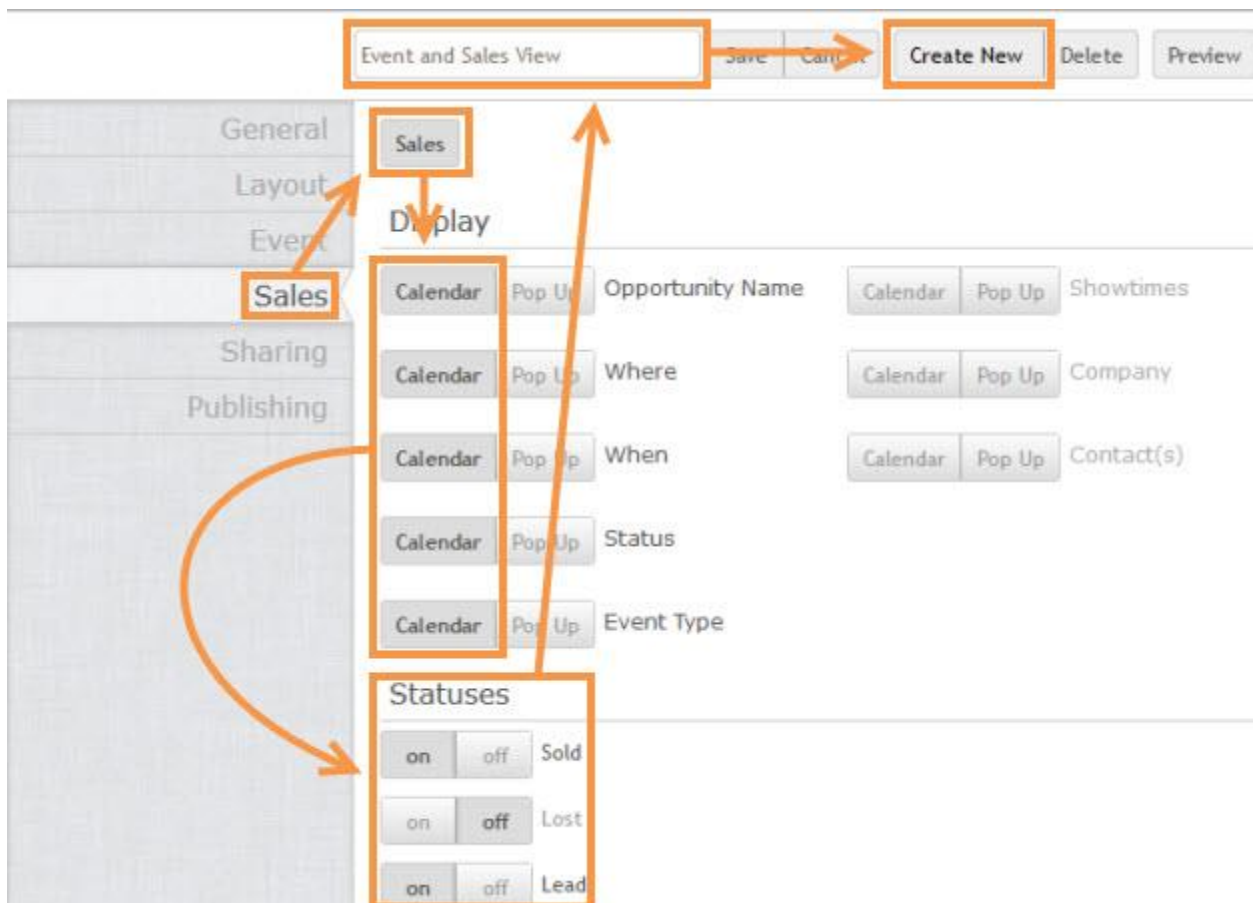
29	30	31	1	2	3	4
			Pottery Class		Pottery Class	
5	6	7	8	9	10	11
Pottery Class	Test RRS Feed	Breakfast		Pottery Class		
12	13	14	15	16	17	18
Pottery Class			Pottery Class		Pottery Class	
			Pottery Class			
19	20	21	22	23	24	25
Pottery Class			Meet the CEO		Pottery Class	
			Pottery Class			
26	27	28	29	1	2	3
Pottery Class		Pottery Class	Pottery Class			

Event and Sales View

1. On the Calendars (new!) page, select a calendar profile to serve as a basis for your new profile. (If you have not previously created a profile and none have been shared with you, your only option will be **Default Setting**.)
2. Click **Settings**.



3. Click the **Sales** tab.
4. Click the **Sales** button.
5. Click the **Calendar** button for any field which you would like to appear on the calendar.
6. Click the **on** button for any Sales Statuses which you would like to appear on the calendar.
7. Type a name for the calendar profile.
8. Click **Create New**.



Default Setting (no sales opportunities)

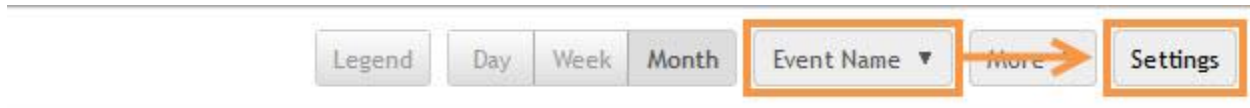


Event and Sales View (with Convention of Penguins sales lead displaying)



Sharing a Calendar Profile

1. On the Calendars (new!) page, select a calendar profile to share.
2. Click **Settings**.



3. Click the **Sharing** tab.
4. Click the **on** button for the permission profiles with which you would like to share this calendar profile.
5. Click **Save**.

