

Tracking Upcoming Sessions

One place for what's coming up. The CRM has its own **Calendar**, reached from the left-hand menu, and it's linked to your Google Calendar. That means the next-session meetings you create in Google Calendar (Section 4) appear here too — so you can see your upcoming sessions inside the CRM without switching tools.

Using the calendar. Open **Calendar** from the left-hand menu to see your scheduled sessions laid out by day, week, or month. Select any entry to see its details — when it is, who's invited, and the meeting link. Because the CRM Calendar and your Google Calendar stay in step, anything scheduled in one shows up in the other, giving you a single reliable picture of what's ahead.

Staying on top of your engagements. Glance at the week to confirm your next sessions are on the books and that nothing has slipped — especially right after you've logged a session and sent the next invite (Sections 3-4).

The screenshot displays the CRM interface with a sidebar menu on the left and a calendar view on the right. The sidebar menu includes items like Home, CRM, Companies, Contacts, CBM Members, Clients, Engagements, Sessions, Events, Reports, Activities, Knowledge Base, Emails, and Calendar. The 'Calendar' item is highlighted with a red box. The main calendar view shows a weekly layout for Tuesday, June 16, 2026. A session is scheduled for 16:00 - 17:00, titled '26-06-14 - Agape W8 Loss 2026-05-15'. The interface also shows a search bar, navigation arrows, and a notification badge with the number 148.

he CRM Calendar — your scheduled sessions, kept in step with Google Calendar.

Revision #1

Created 2026-06-17 21:10:05 UTC by Admin

Updated 2026-06-17 21:10:38 UTC by Admin