

Synchronize calendar

Synchronize calendar with Microsoft Exchange and Microsoft 365

Version 8.0



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Synchronize calendar with Microsoft Exchange and Microsoft 365

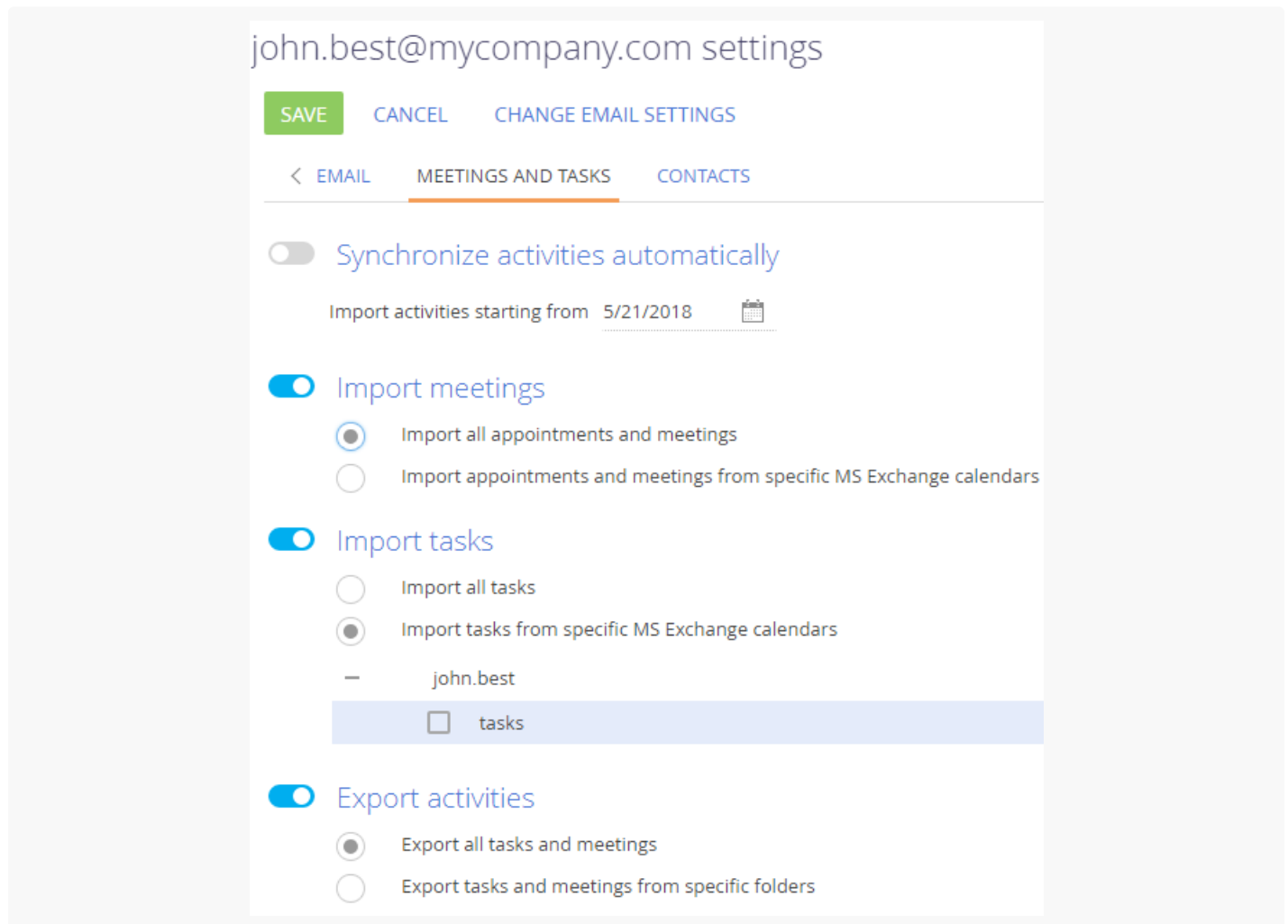
PRODUCTS: [ALL CREATIO PRODUCTS](#)

Use the mailbox synchronization setup page to set up the synchronization of Creatio activities with Microsoft Exchange or Microsoft 365 tasks and meetings (Fig. 1). You can open the page in several ways:

- Click → [*Edit email accounts*] in the communication panel.
- Select [*Actions*] → [*Synchronize activities*] → [*Set up...*] in the [*Activities*] section.

The command contains the name of the account, for example, [*Set up john.best@mycompany.com*].

Fig. 1 Set up the synchronization of Creatio activities with Microsoft Exchange calendar



Creatio uses only the main Exchange calendar (default calendar) for synchronization. The records of additional calendars are not imported. Learn more about setting up the default calendar in [Microsoft documentation](#).

Set up the import of activities into Creatio

To set up the import of Microsoft Exchange or Microsoft 365 **meetings** into Creatio:

1. Go to the [*Meetings and tasks*] tab and enable the [*Import meetings*] toggle.
2. Select [*Import all appointments and meetings*] to import all records from Microsoft Exchange or Microsoft 365 calendars.

If you only want to import records from the selected calendars, select [*Import appointments and meetings from specific MS Exchange calendars*]. Expand the index of calendars and select the calendars to import.

3. Select the [*Import tasks*] checkbox and if necessary, select folders whose tasks to import.
4. Click [*Save*] on the mailbox synchronization setup page.

As a result, Creatio will add the calendar tasks. In this case, only the tasks owned by the current Creatio user will be imported. Set up the import of **tasks** similar to the import of meetings.

Set up the export of activities from Creatio

To set up the export of Creatio activities to Microsoft Exchange or Microsoft 365:

1. Go to the [*Meetings and tasks*] tab and enable the [*Export activities*] toggle.
2. Select [*Export all tasks and meetings*] to export all activities to which you have access.

If you only want to export activities from specific folders, select [*Export tasks and meetings from specific folders*]. The index of folders corresponds to the folders configured in the [*Activities*] section.

3. Click [*Save*] on the mailbox synchronization setup page.

As a result, when exporting tasks that have the [*Display in calendar*] checkbox selected, Microsoft Exchange or Microsoft 365 will create activities of the “Appointment” type. When exporting tasks that have the [*Display in calendar*] checkbox cleared, Microsoft Exchange or Microsoft 365 will create activities of the “Task” type.

Synchronize activities with Microsoft Exchange and Microsoft 365

Creatio can synchronize activities with the Exchange server automatically. To enable automatic synchronization, open the mailbox synchronization setup page, enable the [*Synchronize activities automatically*] toggle, and select the date in the [*Import activities starting from*] field. To perform the synchronization immediately, open the [*Activities*] section, click [*Actions*] → [*Synchronize activities*] → [*Synchronize now*].