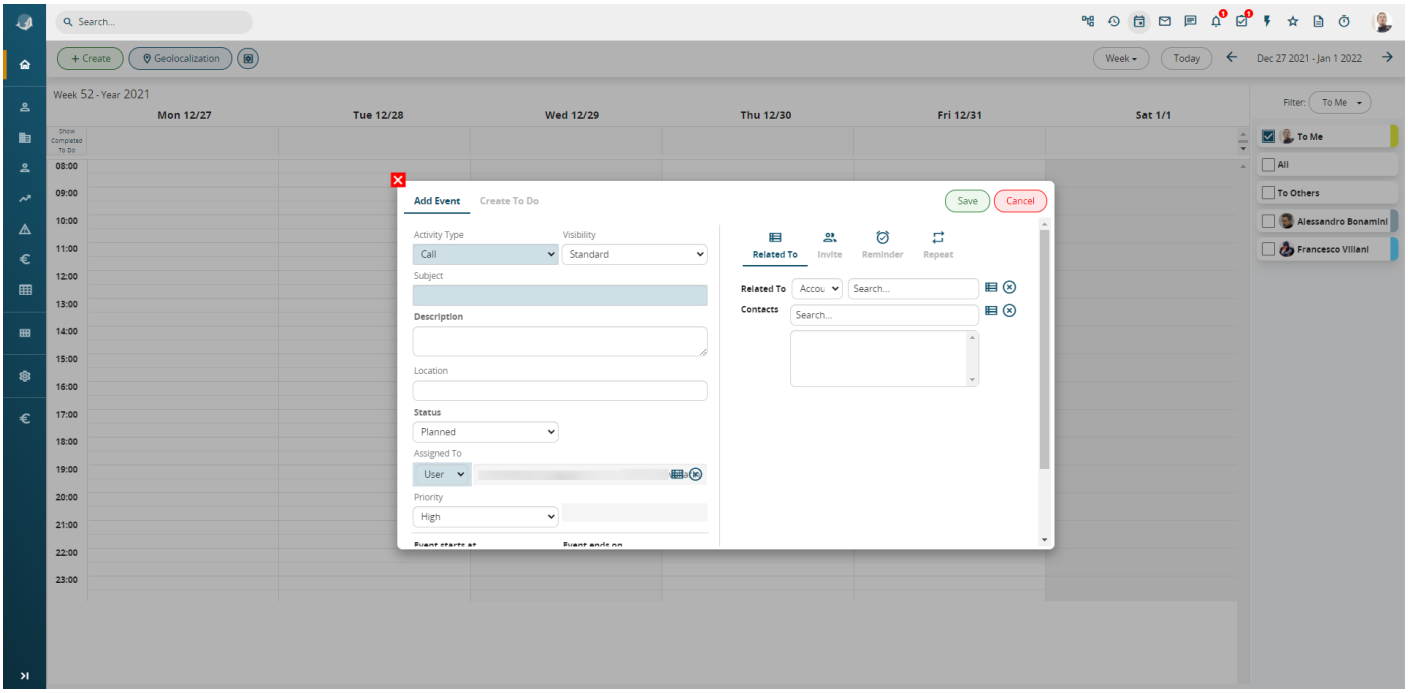
4.1 Add a calendar event

In the Calendar module you can click the green **create** button or click on the agenda area, dragging the mouse in accordance with the event duration (drag & drop).

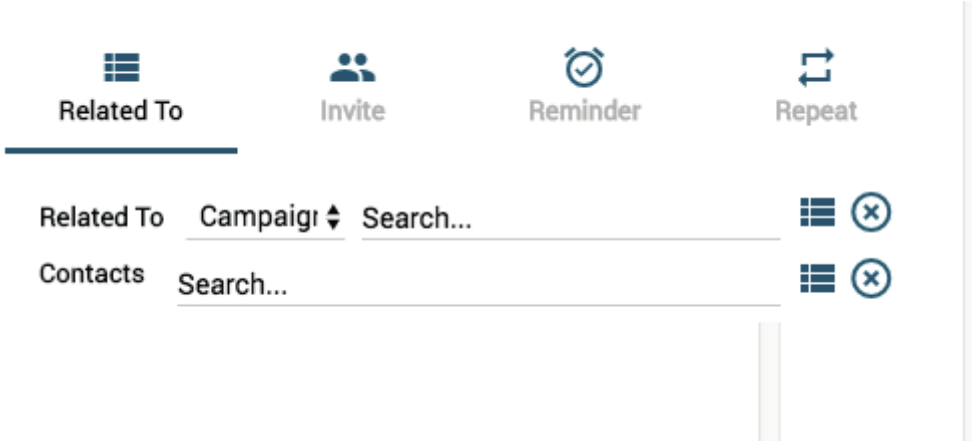


Activity Type	Select Call, Meeting or other customised values
Visibility	Classify an event as Public, Private or Standard
Subject	Enter a name (title) for the event
Description	You can add a brief description of the event
Status	Status is Planned by default. Defines the state of completion of the project
Priority	Set a priority level
Assigned to	Events are assigned by default to the person who creates them, but this can be changed if necessary
"Event starts at" and "Event ends on"	Each event has a start and end; events can last one or more days
All day	Select if the event lasts all day. By default it has 24 hous and it is placed at the top, in the Task section.

Since events can be linked to CRM objects, they can be created also by starting from the object in question (see "Linked to" function).

Linked to

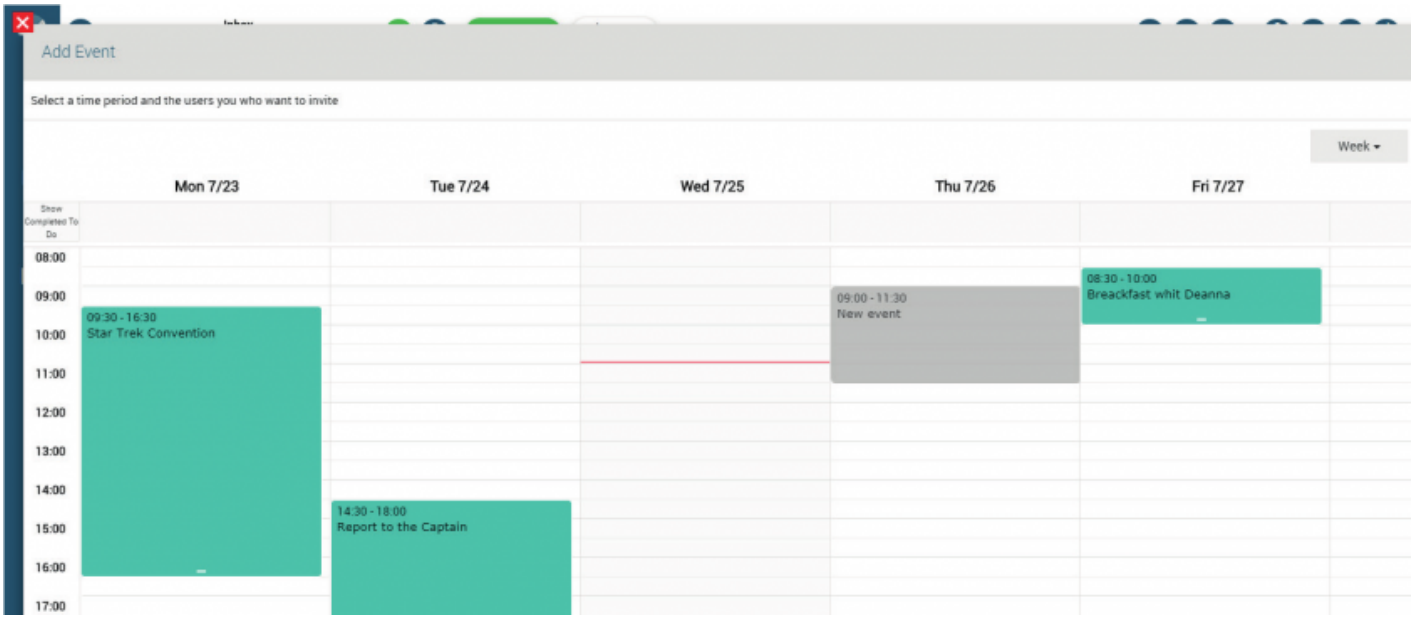
An event can be linked to standard and customised entities (generated by modules creation in Settings) within vtenext. Note that the contacts module is separate from the rest, allowing you to connect one or more contacts to the event.



Warning!

1) The following modules cannot be linked to the calendar: Documents, Reports, Services, Products, Product lines, Newsletters, Targets, Delivery Notes, Price Books, FAQs, PDF Creator, Installations, Timecards, Processes, Contract Services.

2) The relation between an event and the messages module is available only starting from the single email and not vice versa. This does not require the “linked” field to be filled in, but rather a copy of the body of the email in the “description” field.

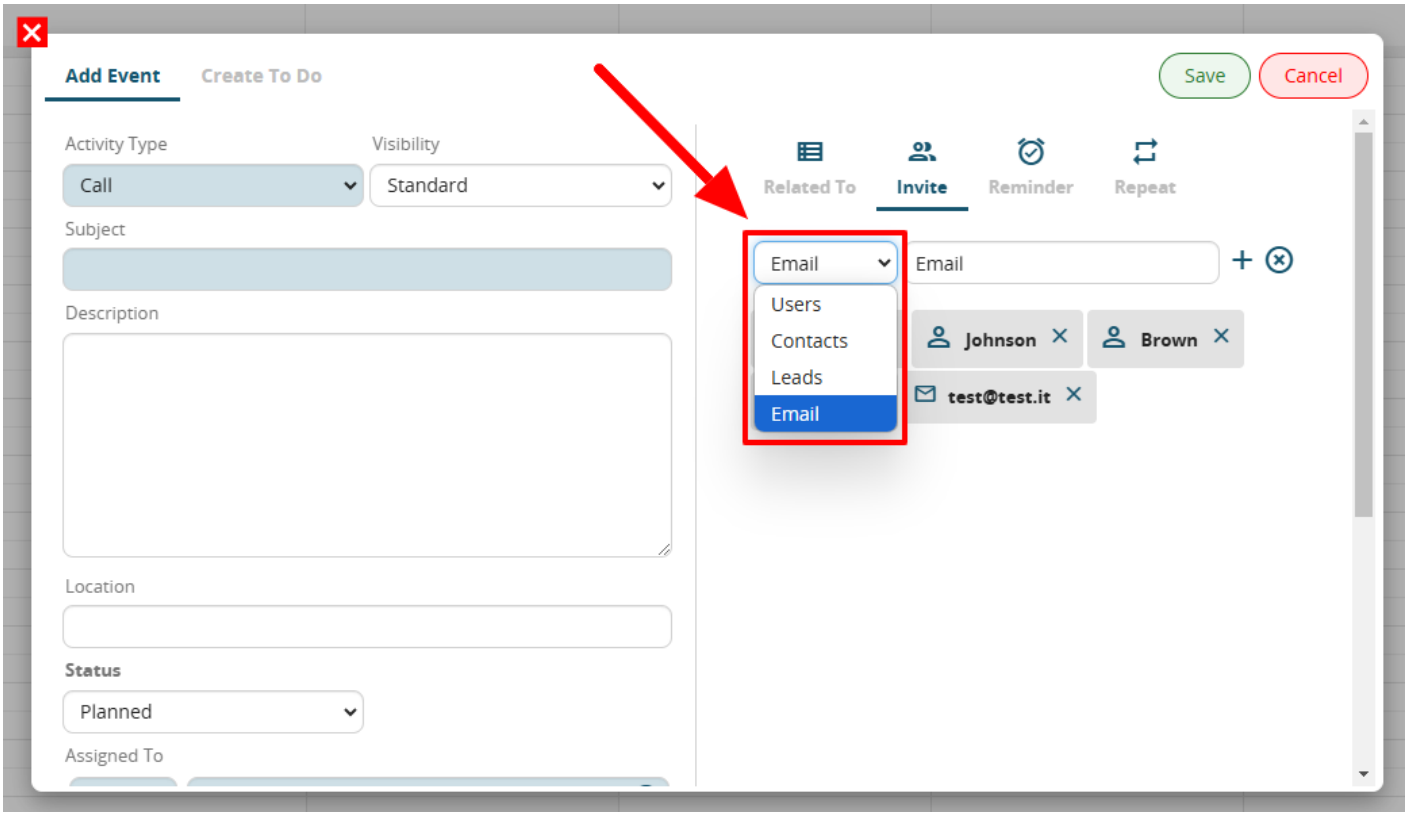


Invite (free or busy)

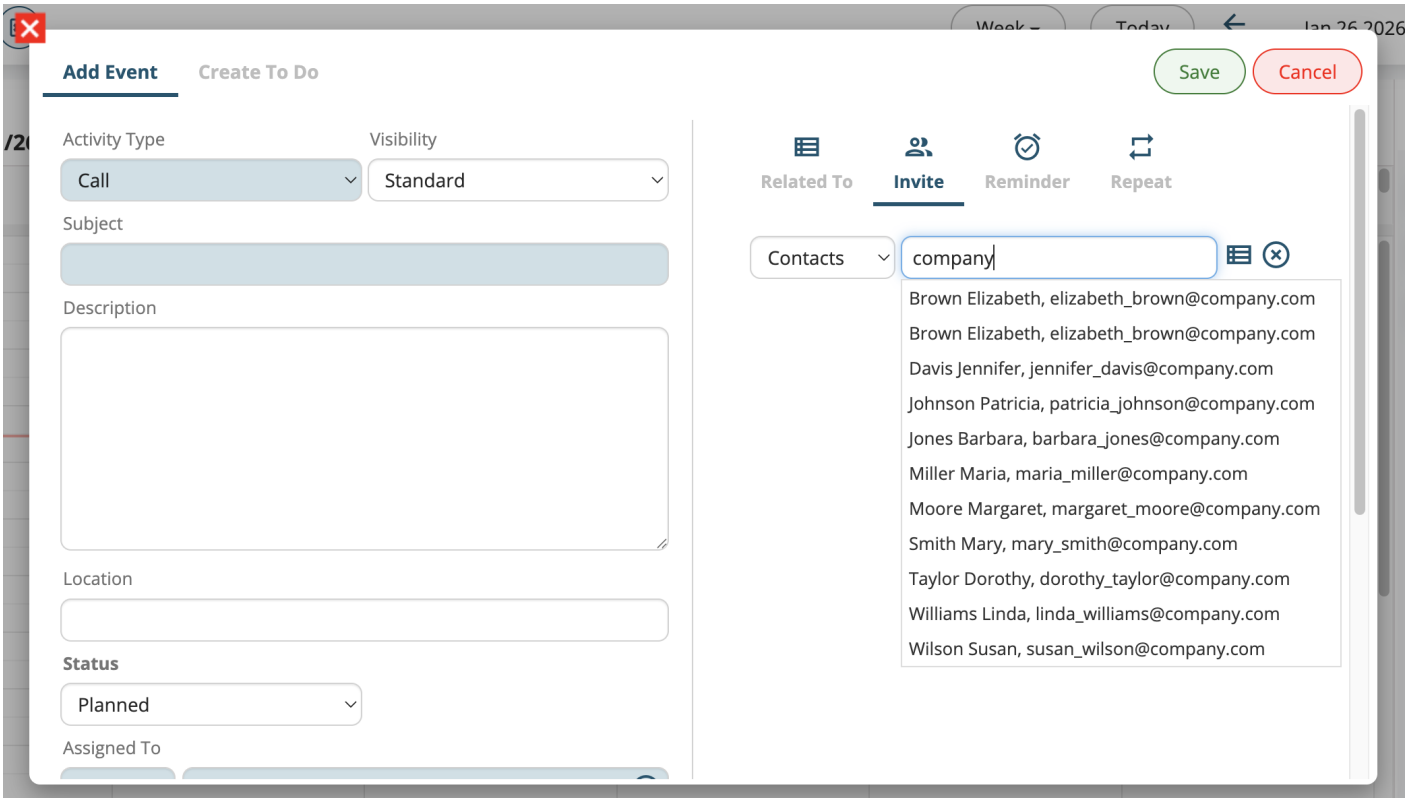
You can invite other users, contacts, leads, and email addresses to the event you are creating.

Contacts, leads, and email addresses will receive a notification email with the event details and the option to indicate whether they will attend or not.

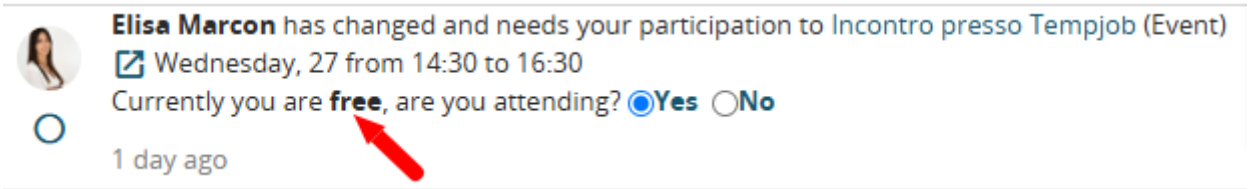
Users will receive a **vtenext notification** (in the Notifications panel) and, by accessing the event in the CRM, they can indicate their participation (**yes/no**) and see the event in their agenda as if it were assigned to them.



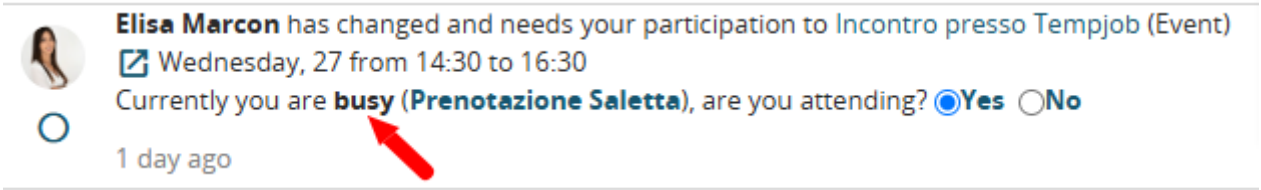
You can also **search for event invitees directly by their email address**. So, if you choose to invite a User, a Contact, or a Lead (excluding plain Email entries, which already work that way), you can find them simply by typing their email address.



When a user invites another user to an event, the invited user will receive a notification informing them whether they are **free or busy** during that specific time slot, allowing them to easily accept or decline the invitation.



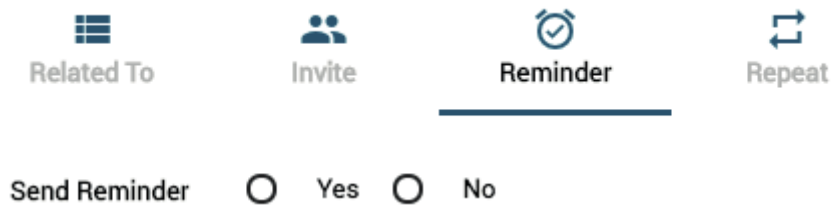
In this screen, you can see that the invited user appears as available and can choose to join the event without needing to check their calendar appointments



In this screen, it is clearly visible that the invited user is marked as busy, and the CRM notifies, with a clickable link, what the user is already scheduled for in the calendar

Attention! To send notification emails, the related job needs to be scheduled in the cron of the vtenext server. For more details, refer to the **CRONJOB** – Scheduled Processes chapter.

Reminder

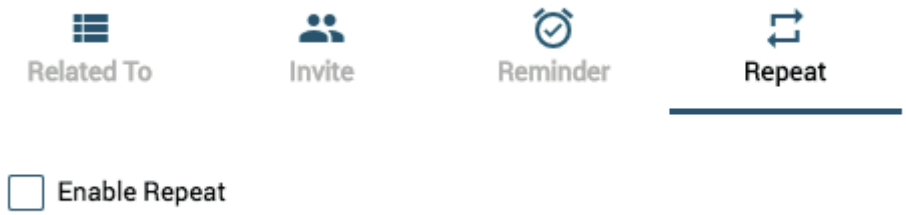


Provides the facility to schedule an automatic memo (in the form of an email or notification) to be sent to all the participants. You can decide how many days/hours/minutes before the event to send the notification.

Warning! To send notification emails you must schedule the job in question in the vtenext server cron; for more details refer to the chapter **CRONJOB** – Processes to plan.

Repeat

Allows you to schedule events that are repeated regularly, establishing the frequency. When the settings are saved the system will create the “copy” events, which are independent from one another.



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