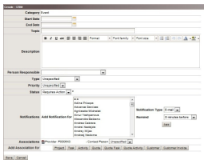




Plan Event

	<p>Here you can plan an event which can be attached to such items as a project, task or activity. Often an event is a meeting between you and your partner and its association is the topic of discussion.</p>
<p>Category</p>	<p>The classification of the CRM action.</p> <div data-bbox="367 516 1498 596" style="border: 1px solid #f0e68c; background-color: #fff9c4; padding: 5px; text-align: center;">This field cannot be modified.</div>
<p>Start Date</p>	<p>The date when the event begins.</p> <p>Manually enter the date in the appropriate date format set in System Configuration or click</p> <div data-bbox="367 709 1068 1409" style="border: 1px solid #ccc; background-color: #f0f0f0; padding: 10px; text-align: center;"></div> <p>and select from the calendar.</p>

<p>End Date</p>	<p>The date when the event concludes.</p> <p>Manually enter the date in the appropriate date format set in System Configuration or click</p>  <p>and select from the calendar.</p>
<p>Topic</p>	<p>The subject of the event.</p> <p>Enter the text into the field.</p>
<p>Description</p>	<p>An explanation of the event.</p> <p>Enter the text into the text box.</p>
<p>Person Responsible</p>	<p>The person accountable for the event.</p> <p>To select, click the drop-down list and select the person responsible.</p>
<p>Type</p>	<p>The nature of the event.</p> <p>To select, click the drop-down list and select a type.</p> <div data-bbox="365 1392 1497 1476" style="border: 1px solid #f0e68c; padding: 5px; margin-top: 10px;"> <p>To create types, go to System > Configuration > System Values > CRM Types.</p> </div>
<p>Priority</p>	<p>The urgency of the event.</p> <p>To select, click the drop-down list and select a priority.</p>
<p>Status</p>	<p>The current status of the event.</p> <p>To select, click the drop-down list and select a status.</p>


Notifications

Reminders concerning the event to be sent to the selected individuals.

- For Add Notification for, select the person to be sent the reminder. Use the scroll bar to search. To select multiple people at once, hold the Ctrl key while selecting.
- For Notification type, select the method in which to remind the person. Click the drop-down list and select the type.
- For Remind, select exactly when the person will be reminded. Click the drop-down list and select the time. For example, if you select "12 hours before", the person will be notified 12 hours before the event.
- When you have configured who will be notified and in what way, click




. A table appears above the information fields:

Type	Status	Remind	User	Delete
E-mail	Waiting	30 minutes before	aa	

- To delete an item from the table, click



<p>Associations</p>	<p>The items which you have associated to this event.</p> <p>To delete an item, click</p>  <p>.</p>
<p>Add Association for</p>	<p>To associate this event to another item.</p> <p>To do so, click the button of the item you want to associate this event to. A new window with the Browse page appears. Select the item from the list. The item now appears in the Associations section.</p>