Calendar Overview

Events represent how marketers/liaisons are engaging their customers, as well as providing a reference point for call/visit notes. The calendar is a quick way to view your events.

Default View

By default the calendar will display your calendar for the current month. You can change the calendar shown by:

- Adjusting the month displayed
- Adjusting the time period shown - month, week, day, list
- Filtering by Event Type - Meeting, Cold Call, Phone, etc.

Events that have not been completed will be shown in blue. Events that have been completed will be shown in green with a checkmark.

> ***Note:*** An event will not show as Complete until a note has been added and the event is marked complete

Shared Calendars

If you have access to other calendars, you will have a drop down of those users on the left side of the page under *Shared Calendar*.

- Select another user's name
- Click *Go*

Event Actions

By Right Clicking on an Event you can:

- Edit an event

- Edit the event series
- Add call or visit notes
- Mark event complete
- Duplicate an event
- Delete a single event
- Delete a series of events