

# 11-50101101154100

# **CALENDAR 4YOU FOR VTIGER CRM 5.X**

## Introduction

The Calendar 4You module for vtiger CRM is module which allows users to maintain and oversee their activities like tasks, calls, meetings and invites. The intention was to provide within new module flexible calendar view with better overview. The flexibility is achieved using new calendar view panels which allow quick show/hide of activities depending on their activity type, status or user ownership. The implementation of the colors within calendar view provides the better overview as well.

The Calendar 4You benefits are:

- calendar view allows quick activities edit / drag & drop (chapter 3)
- calendar view panels with quick show/hide activities (chapter 3)
- colors in calendar view (chapter 4.1.1)
- personal or more users view (chapter 3)
- tasks (to dos) visible in calendar view (chapter 3)
- synchronization of the events with Google calendar (chapters 4.1.3)
- documents can be attached to the activities (chapter 5.1)
- invites are visible in calendar as separate activities (chapter 3)
- introducing the sharing access settings (chapter 4.4)

The Calendar 4You module was designed mainly for vtiger CRM users which need to maintain their own activities as well as activities of colleagues, subordinates. The group leaders or managers can easy select the group of the people and see all their activities. The colors in this case are used to distinguish activities of single users. The Google synchronization as well as extended CalendarView and User settings make the Calendar 4You suitable tool for your daily business.

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# License agreement

- The Calendar 4You License will be referred to as "The license" in the remainder of this text.
- This irrevocable, perpetual license covers all versions 1.xx of Calendar 4You.
- This license gives the holder right to install Calendar 4You on ONE productive vtiger CRM installation and ONE develop vtiger CRM installation for unlimited users.
- The license holder is allowed to make modifications to the Calendar 4You sources but in no event will the original copyright holders of this library be held responsible for action or actions resulting from any modifications of the source.
- The license holder is not required to publicize or otherwise make available any software used in conjunction with Calendar 4You.
- The license holder may not re-distribute the library or versions thereof to third party without prior written permission of the copyright holder.
- Calendar 4You License does not allow the library to be redistributed as part of another product.
- The license may be transferred to another vtiger CRM installation only with prior written permission.
- The wording of this license may change without notice for future versions of Calendar 4You.

# **Terms and conditions**

We accept all major credit cards, PayPal and Bank transfer. Our deliveries:

- Credit Card: delivered immediately
- PayPal: delivered immediately
- Bank transfer: delivered in 2 5 days

After payment you will obtain email with link for download Calendar 4You and your license key as well.

## **Private policy**

During installation it is necessary to exchange following information:

- vtigerCRM version (e.g. 5.4.0)
- Calendar 4You version (e.g. 540.2.0)
- Date and time
- Domain in md5 coding format (e.g. 916b25c201a77a6721003c0030977f3b)
- Action provided by you (INSTALL, REACTIVATE, DEACTIVATE)

# 1 How to install Calendar 4You

Please provide following steps in order to install Calendar 4You:

It is highly recommended to finish the installation without any interruption. For successful installation we need to exchange information (see previous chapter for details).

 Install the .zip package of the Calendar 4You module via Settings -> Module Manager. Click on the Import New button.

	Standard Modules	Custom Modules
		Import New
5	ConfigEditor	0 V t
2	CronTasks	0 R 🗉
3	Import	0 R 🖬
7	Integration	0 R I
3	MailManager	0 R 1
•	Mobile	0 R 🕇
1	WSAPP	0 R I
ьį	British English	0 12
abl	DE Deutsch	a 17

#### Picture 1.1 Installation of Calendar 4You – step 1

2. Select the module zip (package) file that was previously exported or created. Click on the **Import** button.

🎇 Ma	nage module be	havior inside vtiger CRM	
Select the I	Package File		
* File locati	on:	Browse Calendar4You_1_4.zip vtiger module is packaged as a zip file.	

Picture 1.2 Installation of Calendar 4You – step 2

3. Verify the import details parsed from the zip file. Please check that you accepted the license agreement and click Yes to proceed or No to cancel.

erify Import Details	
Module Name	Calendar4You
Module Directory	modules/Calendar4You
Req. vtiger version	5.4.0
License	<pre>* Module : Calendar4You * Version : 540.1.4 * Vtiger : 5.4.0 * Author : IT-Solutions4You s.r.o - www.its4you.sk * Supported browsers : Internet Explorer 7 or higher, Mozilla Firefox 3.0 or higher ************************************</pre>

#### Picture 1.3 Installation of Calendar 4You – step 3

4. Click on **Finish** to complete the module import.

porting Module	
sating Module Calendar4You STARTED ializing module permissions DONE dating tabdata file DONE dating tabdata file DONE dating parent_tabdata file DONE dating parent_tabdata file STARTED dating tabdata file STARTED dating table IF NOT EXISTS 'ts4you_calendar4you_license' ('version_type' verchar(10) NOT NULL, 'license' verchar(255) NOT N Y 'version' ('version') DENGINE=InnoDB DONE L: CREATE TABLE IF NOT EXISTS 'ts4you_calendar4you_view' ('version' verchar(10) NOT NULL, 'license' verchar(255) NOT N Y 'version' ('version') D	ty` NOT NULL, Y KEY ('efid') NULL, NULL, 255) NOT NULL, UNIQUE har(255) NOT

Picture 1.4 Installation of Calendar 4You – step 4

In order to finish installation, please provide following validation steps.

1. Calendar 4You Validation Step. Please insert a license key and make sure that your server has internet access. Click on Validate.



2. If Calendar 4You is installed successfully you will see following screen. Click on Finish

Calendar4You installation >> Finish >> 2/2
Your license key was successfully validated
Click on the "Finish" button and You will be redirected to new calendar.



Picture 1.6 Validation step 2 – Finish installation

# 2 How to add activity

There are several approaches how to add new activity (event or to do):

- directly from CalendarView (recommended) the order is same for Day, Week or Month view and is described below – the advantage of this approach is that start date and time is automatically defined by your selection and you can easily see whether the time slot is empty for your activity as well as invited colleagues
- using Add event button া
- using action buttons Add Event, Add To Do from records of the modules like Contacts, Organizations

The recommended and quick approach is using CalendarView. It allows creating activity directly from the Day, Week or Month view for particular time. In order to add new activity:

- 1. Switch to Day, Week or Month view according to your needs.
- 2. Click to place in CalendarView to select start time of your activity.
- 3. Select activity type (Call, Meeting, etc).

5. Fill the form and save it using button

4. The new window "Add Event" (for Call, Meeting, etc.) or "Create To Do" (for tasks) will appear on the screen.

Save



Picture 2.1 How to add new activity in Calendar View

The windows "Add Event" (for Call, Meeting, ...) and "Create To Do" (for task) are well known from module Calendar and have same usage and design. Therefore detailed description is not necessary in this manual. Please refer also to <a href="https://wiki.vtiger.com/index.php/Calendar\_Module">https://wiki.vtiger.com/index.php/Calendar\_Module</a> for more details.

# 3 CalendarView

The CalendarView has several possibilities to be adjusted according to your needs and provides new functionalities. The following two pictures present some of CalendarView functions:

- 1. Calls, meetings and invites or other activities are represented by rectangular areas which cover places with respect to real start/end time of the activities. You can easily drag and drop activities, simply extend end time or easily to switch to EditView or DetailView of the activities.
- 2. Tasks/To Dos are shown in the CalendarView as well in the above part "all-day".
- 3. Day, Week and Month calendar are provided. Just click to change the view.
- 4. Navigation buttons to quick selection of the date can be used.
- 5. User Settings deals with Time settings, Calendar sharing and Google authentication please refer to chapter 4.2 for more details.
- 6. Module manager settings profile privileges, license settings, upgrade and uninstallation can be found here please refer to chapter Module manager settings for more details.
- 7. 💼 Add new activity button (It opens new window to create new activity for current day).
- 8. Within Activity List panel you can easily show/hide different types of activities. In addition you can define colors, displayed info and set up Google synchronization here (see chapter 4.1.3 for details). As you can see in the Picture 3.1 the activities are shown in colors in case you are viewing only activities assigned to one user. Please note that new feature introduced within Calendar 4You is viewing your invites.

tivity List <b>Q</b>	O O Today	5.6.	Sep 9 — 13 2013		3. Day Week
7 Task	Mon 9/9	Tue 9/10	Wed 9/11	Thu 9/12	Fri 9/13
⊽ Call	all-day	order vtiger 1000	2.	Uneck paid involces.	
⊽ Meeting		0.00.00			
⊽ Invite	8.15am - 10:15am	INV258 - Inhn =			
	with Amold				
signed To 9	9am		1.		
tastislav Itsfouryou 🔄		Drag and	d drop	Click to or	lit or
4.0		L'ag arr	a arop	CIICK ID EL	
10.	10 am	to move	10.00am - 11.00am Department meeting	📕 view detai	
7 Planned			A	non dota	
7 Held				Action: detail   edit	
7 Not Held	1 Tam	Olialeana		Department meeting	
sk status		Click and	a drag z		
That Elected	120m	to extend	end time		
7 In Drogram	Tapin .	to exterie			
7 Completed					
7 Pending Input	1pm 1:00pm - 1:20pm	1:00pm - 1:20pm	1:00pm - 1:20pm	1:00pm - 1:20pm	1:00pm - 1:20pm
7 Deferred	Dairy startus of orders	Daily status of orders	Daily status of orders	Daily startus of orders	Daily status of orders
7 Planned					
	2pm				2:00pm - 3:30pm Order status

Picture 3.1 CalendarView with activities of one user

- 9. The panel "Assigned To" is used to show/hide activities for more users in parallel or just to see other user activities. In this case the colors are used to easy distinguish activity of the correspondent user. Using checkboxes you can easily select users of the group of interest. The advantage is that selected group is remembered under "All selected" value and can be used again in next login to the system.
- 10. Using checkboxes of the panel "Event status" you can show/hide events based on their status.
- 11. Using checkboxes of the panel "Task status" you can show/hide tasks based on their status.

Activity List 8	0 0	Today 4	5.6.	Sep 9 — 13 2013		3. Day Week Mo
I⊽ Task		Mon 9/9	Tue 9/10	Wed 9/11	Thu 9/12	Fri 9/13
[☑ Call	all-day		Order vtiger1000	2.	Check paid invoices.	
I⊽ Meeting	7 am					
[√ Invite						
			8 00am - 8 20am - 8 00am - 8 20am			
Assigned To	Gam	8:15am - 10:15am 8:15am - 10:15am	INV258 - John = INV258 - tohn	1		
All selected		with Amold with Amold				
Arnold Strong	9am					
T Jack Worst						
I⊽ John Best						
Peter Shopie	10am			10:00am 10:00am 10:00am 10:00am DepartmeDepartmeDepartmeDepartme		
Rastislav Itsfouryou				meeting meeting meeting		
	11.000					
Event status 10	1100					
I U. I Planned						
🔽 Held	12pm					
🔽 Not Held						
Fask status	lpm	1:00pm - 1:20pm Daily status of orders	Daily status of orders	1 Oopm - 1 20pm Daily status of orders	1 00pm - 1 20pm Daily status of orders	Daily status of orders
Vot Started						
🔽 In Progress						
Completed	2pm					Order status Order status
Pending Input						
P Deferred						
Planned	3pm					

Picture 3.2 CalendarView – more users view

# 4 Calendar 4You settings

The Calendar 4You settings consist of:

- CalendarView settings available for all users via Activity list panel
- User Settings user specific settings initiated via button
- Module manager settings initiated using button
- Sharing Access settings you can define organization-level sharing rules

## 4.1 CalendarView settings

There are some additional settings related to CalendarView which can be initiated directly from Activity list panel as shows in the below picture. The CalendarView settings consist of the following tabs:

- Colors in calendar
- Displayed info (not available for Invite)
- Google Synch (not available for Task and Invite)

Activity List	O O Today	
I⊽ Task	Colora in colorato	×
i⊽ Invite	Background #FFFB00 ®	
Assigned To Rastislav Itsfouryou		
Event status	Save Cancel	
✓ Planned		

Picture 4.1 CalendarView settings initialization

#### 4.1.1 Colors in calendar

Within our CalendarView we introduced colors. The intention was to provide better overview by using different colors for single activity type or user depending on current view. In addition you can select your own color for single activity/user. In order to select the color, please initiate the CalendarView settings and provide following few simple steps:

- 1. Go to "Colors in calendar" tab and click on icon 🧐.
- 2. Select the color.
- 3. Save the settings using button **Save**.

Call" Settings			🛛 🛛 🕑 Mozilla I	irefox 😝 💶 🔉
Colors in calendar	Displayed info	Google Sync	#FF	FB00 of Filboo
Background	1. #FFFB00 ®			2.
Text:	9			
	3.			
	Save	ancel		



### 4.1.2 Displayed info

The 'Displayed info' tab allows you to define how much info is displayed in CalendarView for all single views separately, i.e. for day calendar, week calendar as well as month calendar. In addition you can define displayed info separately for each activity type. The use of this tab is simple. In order to view more information fields please select them from "Available informations" and click on button Add >> . You can find default field which will be used on the top of the selected informations (marked purple in the following picture).



Picture 4.3 Displayed info

## 4.1.3 Google Synch

As was already mentioned, you can view or synchronize your Google events with your vtiger events using Calendar 4You. Firstly you have to set up your Google account/credentials (please refer to chapter 4.2.3 for details).

"Meeting" Settings					"Meeting" Settings	i		$\times$
Colors in calendar	Displayed info	Google Sync			Colors in calendar	Displayed info	Google Sync	
Synchronize with calenda	r rastislav. ITS4You meetings	gmail.com	1.	]	Synchronize with calendar: Export "Meeting" to calenda Import from calendar to "Me	ITS4You meetings ar: 🔽 setting": 🔽 2. 3.	×	
	Save	Cancel				Save	Cancel	

Picture 4.4 Google Sync settings

- 1. In case you have more calendars within your Google account, please select the calendar which would you like to use. Please note that one activity type can be synchronized with only one Google calendar.
- 2. Additional step is to define export and import i.e. synchronization:
  - a. Export "activity\_name" to calendar checked means that all new created events in Calendar 4You will be also exported and visible in the Google calendar. In addition any change of these events will be synchronized towards Google calendar. These events are marked with icon S (see Picture 4.5).
  - b. Import from calendar to "activity\_name" checked means that all new created events in Google calendar will be also visible in the Calendar 4You. In addition any change of these events in Google calendar will be synchronized towards Calendar 4You. These events are

3. Click on button **Save** to save synchronization settings.

The Calendar 4You allows you to add Google events into vtiger (see blue link "Add into vtiger" in the below picture). Please click on this link to add this event to vtiger. Important note: Events added from Google to vtiger have to be updated/edited/moved in Calendar 4You only (not in the Google calendar) in order to synchronize the changes done in Calendar 4You towards Google calendar.

Meet r	egarding vtiger	order. Google event shown in vtiger
		Action: Add into vtiger 🖌 🖌 🕞
13		Meet regarding vtiger order. Description: Start Date & Time: 2013-09-12 12:00 End Date & Time: 2013-09-12 13:00 Location:
14 14:00	- 15:00	
Call Ma	ark - invoice han	dling Event synchronized to google calendar
	R	Action: detail   edit

Picture 4.5 Synchronized/Google events in CalendarView

## 4.2 User settings

User settings part contains following:

- Time Settings allows to define several views of the calendar from time point of view
- Calendar sharing deals with sharing of the calendar
- Google account settings allows to add Google account

#### 4.2.1 Time settings

The description of several time view calendar settings is described in the following table. Please refer also to Picture 4.6 to see examples of the usage.

Name	Description
Start my calendar time at	Define your calendar start time. This setting is available for day and week calendar.
Use 24 hours format	Switch between 12 and 24 hours format.
Show weekends	Show/hide weekends.
Default Activity View	Define your calendar default activity view – day, week or month.
Default User View	Define your calendar default user view – Me (your activities only), All selected.
Week starts at	Define start day of the week – Monday, Sunday





**Picture 4.6 Time Settings** 

## 4.2.2 Calendar sharing

The Calendar sharing within Calendar 4You is same as built-in calendar module for vtiger. You need just to select from Available Users. Please for more details refer to vtiger forums or other online manuals.

Calendar Sharing Share my calendar with the following selected users
<ul> <li>To share, select the users from the "Available Users" list and click the "Add" button.</li> <li>To remove, select the users from the "Selected Users" list and the click "Remove" button.</li> </ul>
Available Users Selected Users
Peter Shopie     Add >>       Arnold Strong     <       John Best

Picture 4.7 Calendar sharing

## 4.2.3 Google authentication

The Calendar 4You functionality "Google Sync" requires setting the Google account. Please provide following steps:

1. Please visit page: <u>https://console.developers.google.com</u> and sign in

	Google	
	One account. All of Google.	
	Sign in to continue to Google Developers Console	
	Email Password Sign in Stay signed in Need help? Create an account	
	Picture 4.8 Google authentication step 1	
2. Click on Create Project but	itton	
	← → C 🖍 🔒 https://console.developers.google.com/project	
	Google Developers Console	
	Projects Create Project	
	Billing You do not have any active projects.	
	Account settings Need help? Projects pending deletion Privacy & terms	
	Picture 4.9 Google authentication step 2	
3. Type Project name and c	click on <b>Create</b> button and your project will be created	
P	New Project PROJECT NAME C Calendar4You Test Create Cancel Cancel	
	Picture 4.10 Google authentication step 3	

#### 4. Click on APIs & auth and in APIs turn on Calendar API

Google Developers (	Console		
< Projects	AdSense Host API	100,000 requests/day	OFF
Calendar4You Test	AdSense Management API	10,000 requests/day	OFF
Overview Permissions	Analytics API	50,000 requests/day	OFF
Billing & settings	Apps Activity API	10,000,000 requests/day	OFF
APIs & auth	Audit API	10,000 requests/day	OFF
APIS Credentials	Blogger API v3	10,000 requests/day	OFF
Consent screen Push	Books API	1,000 requests/day	OFF
Monitoring	CalDAV API	1,000,000 requests/day	OFF
Source Code Compute	Calendar API	1,000,000 requests/day —	OFF
Networking	Chrome Web Store API	none	OFF
Storage Big Data	Cloud Network Performance Monitoring API	none	OFF
	Contacts API	20,000,000 requests/day	OFF

Picture 4.11 Google authentication step 4

Create new Client ID

button

5. Now in APIs & auth and in Credentials please click on

Google Developers Console



Picture 4.12 Google authentication step 5



Picture 4.13 Google authentication step 6

7. Now, your key will be generated and downloaded, please save it. You will need this file. Then click on Okay, got it button

only copy of this key. You are responsible f	for storing it securely.
/our private key's pa	ssword is displayed below. it will not be shown again.
notasecret	
You must present thi	s password in order to use the private key.
Okay, got it	-

Picture 4.14 Google authentication step 7

8. You can see your **Service Account** info. Then please click on Create new Key button (if it is not working, click on different link e.g. APIs and then on Credentials again and button will be working)

Projects	OAuth	Service Account			
Calendar4You Test Overview Permissions Billing & settings	Outh 20 allows users to share specific data with you (for example, contact lists) while keeping their usernames, passwords, and other information private.	CLIENT ID EMAIL ADDRESS CERTIFICATE			
APIs & auth APIs	Create new Client ID	Generate new JSON key	Generate new P12 key	Delete	
Credentials Consent screen Push Monitoring Source Code Compute	Public API access Use of this key does not require any user action or consent, does not grant access to any account information, and is not used for authorization.				

Picture 4.15 Google authentication step 8

9. Please choose Server key



10. Click on	Create	button			
	Crea	ate a server key and configure allowed IPs			
	This key should be kept secret on your server.				
	Every API request is generated by software running on a machine that you control. Per-user limits will be enforced using the address found in each request's userIp parameter, (if specified). If the userIp parameter is missing, your machine's IP address will be used instead. Learn more				
	ACCI One I	EPT REQUESTS FROM THESE SERVER IP ADDRESSES IP address or subnet per line. Example: 192.168.0.1, 172.16.0.0/16, 2001:db8::1 or 2001:db8::/64			
		ĥ			
	-	Create Cancel			

Picture 4.17 Google authentication step 10

11. Now, you can see your **Key for server applications** that you will need in your CRM. Please check chapter 4.1.3 Google Synch.

< Projects	OAuth	Service Account	
Calendar4You Test	OAuth 2.0 allows users to share specific data with you (for example, contact lists) while keeping their usernames, passwords, and other	CLIENT ID	
Overview	information private.	EMAIL ADDRESS	
Permissions	Learn more		
Billing & settings	Create new Client ID	CERTIFICATE FINGERPRINTS	
APIs & auth			
APIs		Generate new JSON key	Generate new P12 key Delete
Credentials			
Consent screen			
Push	Dublic ABL accord	Key for server applications	
Monitoring	Lise of this key does not require any user action or consent does not	Rey for server appreciations	
Source Code	grant access to any account information, and is not used for	API KEY	
Compute	authorization.	IPS	Any IP allowed
Networking	Learn more		
Storage	Create new Key	ACTIVATION DATE	
Big Data		ACTIVATED BY	
Support Need help?		Edit allowed IPs Reg	generate key Delete
Privacy & terms 17			

Picture 4.18 Google authentication step 11

12. Open your CRM system click on More -> Calendar4You



Picture 4.19 Google authentication step 12

Calendar4You	2 🖪 🗷 🗐		
	Picture 4.20 Google aut	hentication step 13	
st upload downloaded	file from step 7		
Calendar Settings		$\boxtimes$	
Google authenticati Missing Auth data Login: Api Key: ClientID: FileKey:	on for user "Administrator"	Caler	rdar4You Testp12

- 15. Now, click on 🖾 button again, fill required data and click on save button
  - a. Login login into Google account
  - b. Api Key API KEY from Key for server applications from step 11
  - c. ClientID ClientID from Service Account from step 8 without ".apps.googleusercontent.com"
  - d. FileKe name of downloaded file that you upload in step 14 without ".p12"

alendai	r Settings	
<b>\$</b>	Google authentication for user "Administrator" Missing Auth data	
	Login:	
	ClientID:	

Picture 4.22 Google authentication step 15

**Note:** In case of trouble with error message: Error refreshing the OAuth2 token, message: '{ "error" : "invalid\_grant" }', please go to the page: <u>https://wiki.debian.org/NTP</u> and install it on your server.

16. Go to your Google account and choose Calendar



Picture 4.23 Google authentication step 16

17. Click on the butto	on and choose <b>Settings</b>
	ys Agenda More 🔻
	Display Density:
	Comfortable
	Cosy
	Compact
	Settings
	Help
	Labs
	Offline
	Sync with mobile device
	Send feedback
	Picture 4.24 Google authentication step 17
18. Choose Calendars	

18. Choose Calendars



Picture 4.25 Google authentication step 18

### 19. Click on Share this calendar

Calendar Settings			
General Calendars Mobile Setup Labs			
« Back to calendar			
My Calendars Calendars that I can view and modify			
CALENDAR	SHOW IN LIST all none	NOTIFICATIONS	SHARING
	ø	Edit notifications	Share this calendar
Birthdays     Displays birthdays of people in your Google + circles and Google Contacts. Also displays anniversary and other event dates from Google Contacts, if applicable.	ø		
I Tasks	<b>\$</b>		
Disture 4.36 Coople authoritication atom 10			



20. For Email address use email that you can find in Service account info from step 8 then choose Make

changes AND manage sharing and click on	Save	button.

Calendar Details Share this Calendar Edit notifications	
« Back to calendar Save Cancel	
Make this calendar public Learn more This calendar will appear in public Google search results.     Share only my free/busy information (Hide details)	
Share with specific people	
Person	Permission Settings
1.	See all event details  Add Person Add Person
	Make changes to events See all event details See only free/busy (hide details)
Picture 4.27 Google authentication st	ep 20

21. Now please check chapter 4.1.3 Google Synch to synchronize your events.

# 4.3 Module manager settings

The Calendar 4You settings can be initiated using button 4 from the Calendar 4You or CRM Settings > Module Manager > Custom modules. In the module manager settings you can find (Picture 4.28):

- Profiles manage user-specific Calendar 4You access to different roles
- License manage all settings related to your license
- Upgrade initiate upgrade of the Calendar 4You
- Uninstall Calendar 4You completely remove Calendar 4You

🌾 Mai	nage module behavior inside vtiger CF	ξ <b>Μ</b>			
	Profiles		License		Upgrade
- Contraction of the second se	Manage user-specific Calendar4You access to different Roles.	~~	Manage your License Key	*	Upgrade Calendar4You
	Uninstall Calendar4You				
	Uninstall Calendar4You completely from your vtiger.				

Picture 4.28 Calendar 4You settings

### 4.3.1 Profiles

You may define Calendar 4You privileges for all profiles. You may select Create/Edit, View and Delete. Just use checkboxes and click on Save button to save changes.

	/ou access to different Roles.		
Define Calendar4You priv	vilegies for all profiles		Save Cano
Profiles	Create/Edit	View	Delete
Profiles Administrator	Create/Edit I⊄	View V	Delete IV
Profiles Administrator Sales Profile	Create/Edit	View IV	Delete V
Profiles Administrator Sales Profile Support Profile	Create/Edit	View マ マ	Delete

Picture 4.29 Manage profiles

### 4.3.2 License settings

In case that some problem occurs with license key or in case you need to reinstall Calendar 4You you have to deactivate and reactivate license key. To deactivate license key please provide following steps:

- 1. Click on Deactivate license button.
- 2. Confirm deactivation using button in next window.
- 3. You are informed about successful deactivation of the license. Just click on

Modu Manage	le Manager > your License Key	Calendar4You > Li	cense		4	
	License Key	keykeykeykeykey	Reactivat	e license Deactiv	vate license	[Scroll to Top]
Modu Manage	le Manager >	Calendar4You > Lio	cense			
	Li Do You re	aly want to deactivate Your lic	ancel	e license Deactiv	nate license	[Scroll to Top]
Modu Manage	le Manager >	Calendar4You > Li	cense			
	You have su	accessfuly deactivated your Co	alendar4You. OK	ste		[Scroll to Top]

Picture 4.30 Deactivate license

After deactivation of license you cannot use Calendar 4You at all but all inputs created within built in Calendar will be again visible in the Calendar 4You after activation of the license.

To activate license you have to provide following steps:

- 1. Insert the license key and click on button Activate if you are activating license after previous deactivation.
- 2. Activation continues with validations steps well known from installation process; please refer to chapter 1, Picture 1.5, Picture 1.6.

Module Manager >	Calendar4You > Lice	nse	
Manage your License Key			
Lisopos Kov	koukoukoukoukoukou	Activato	
License key	Reyneyneyneyney	ACTIVATE	

#### 4.3.3 Upgrade

The upgrade of Calendar 4You can be started using vpgrade link in the module manager. Please browse the package using button and click on button vpgrade.

Manage module	behavior inside vtiger CRM
Select the Package Fil	e
* File location:	Browse Calendar4You_540_1_8.zip
	vtiger module is packaged as a zip file.

Picture 4.32 Upgrade of the Calendar 4You – step 1

The upgrade continues with following window. Please verify the upgrade details parsed from the zip file. Please check that you accepted the license agreement and click Yes to proceed or No to cancel.

erify Upgrade Details	
Module Name	Calendar4You
Nodule Directory	modules/Calendar4You
/ersion	540.1.8 [Installed Version 540.1.4]
eq. vtiger version	5.4.0
icense	<ul> <li>Module : Calendar4You</li> <li>Version : 540.1.8</li> <li>Version : 540.1.8</li> <li>Version : 150.1.50.1.0</li> <li>Author : IIT-50.1.0.0</li> <li>Supported browsers : Internet Explorer 7 or higher, Mozilla Firefox 3.0 or higher</li> <li>LICENSE</li> <li>The Calendar4You License will be referred to as "The license" in the remainder of this text.</li> <li>I accept the license agreement.</li> </ul>

Picture 4.33 Upgrade of Calendar 4You – step 2

Click on **Finish** to complete the module upgrade.

8	Settings > Module Manager > Upgrade Manage module behavior inside vtiger CRM	
Updatin	ıg module	
Invoking Invoking	vtilb_handler for module.preupdateSTART vtilb_handler for module.preupdateDONE	
Deleting I	links DONE	
Adding L Adding L	.ink (HEADERCSS - Calendar4You_HeaderStyle1) DONE ink (HEADERSCRIPT - Calendar4You_HeaderScript1) DON	
Adding L	ink (HEADERSCRIPT - Calendar4You_HeaderScript2) DON	
Adding L	ink (HEADERSCRIPT - Calendar4You_HeaderScript3) DON ink (HEADERSCRIPT - Calendar4You_HeaderScript4) DON	
Updating	version to 540.1.8 DONE	
Invoking	vtlib_handler for module.postupdateSTART vtlib_handler for module.postupdateDONE	

Picture 4.34 Finish upgrade

In case that installed version of Calendar 4You matches the package version, upgrade will be not provided and following information will appear on the screen.

6	Settings > Module Manager > Upgrade	
	Manage module behavior inside vtiger CRM	
Upgrad	de Failure	
Cannot	t upgrade! Installed Version 540.1.8 matches Package Version	
		Finish

Picture 4.35 Upgrade failure

#### 4.3.4 Uninstall Calendar 4You

The uninstallation of Calendar 4You is fully automatic. Within uninstallation also Calendar 4You license is deactivated and Calendar 4You related directories are deleted. For uninstallation provide following steps:

- 1. Click on button Uninstall Calendar4You
- 2. Please confirm uninstallation via button in dialog box.

<b>8</b>	Module Manager > Calendar4 You > Uninstall Calendar4 You Uninstall Calendar4 You completely from your vtiger.
D Un	install Calendar4You completely from your vtiger.
Uninsta	all Calendar4You Uninstall Calendar4You 1.
	Module Manager > Calendar4You > Uninstall Calendar4You
	Uninstall Calendar4You completely from your vtiger.
	Uninstall Calendar4You completely from your vtiger. Are you sure to uninstall completely Calendar4You and deactivate your license?
Unins	Uninstall Calendar4You completely from your vitiger.  Are you sure to uninstall completely Calendar4You and deactivate your license?  2. OK Cancel

Picture 4.36 Uninstall Calendar 4You

## 4.4 Sharing Access settings

We introduced the possibility to define organization-level sharing rules for Calendar4You. It means you can define all different options for sharing access i.e. Private, Public (Read Only), Public (Read, Create/Edit), Public (Read, Create/Edit, Delete). This is very useful feature especially for working in groups. Please refer to <a href="https://wiki.vtiger.com/index.php/Sharing\_Access">https://wiki.vtiger.com/index.php/Sharing\_Access</a> for more details how to define sharing access.

Settings Manage modu	> Editing Sharing Access le sharing rules & custom sharing rules	
Organization-level Sha	ring Rules	Save Permissions Cancel
Opportunities	Public: Read, Create/Edit	
		<u></u>
Calendar4You	Private	-
	Public: Read Only Public: Read, Create/Edit Public: Read, Create/Edit, Delete	
	Private	

Picture 4.37 Calendar 4You sharing access

# **5** Additional features

## 5.1 Documents assigned to activities

The Calendar 4You provides new possibility to assign the documents to events or tasks. It means that meeting presentations or other discussed documents related to calendar activity can be found in the DetailView of the activity. You can easily to do it using well known steps via "More Information" tab in the DetailView of the event or task. Just use the buttons **Select Documents** or **Add Document**.

Event Informati	More Information  Documents						
	Event Type Me	sting					
	Event Name	[550] with Arnold - E	vent More Informatio	•			
	Description	Updated 1 day ago (12 Sep 20	13) By Rastislav Itsfouryou				
		Event Information	More Information				
		Tocuments					
		Showing Records 1 - 1	of 1 🕘 🖲 🚺	of 1 🕑 🕑	Select Document	s 🛛 Add Docu	ument
		Title 🔻	File Name	Modified Time	Assigned To	Folder Name	Action
		presentation - meeting	meeting_withArnold.ppt	2013-09-12 11:19:55	Rastislav Itsfouryou	Default	edit   de

Picture 5.1 Documents in More Information tab

# 6 Tips & tricks

## 6.1 Google synchronization tip

Below you can find simple example of synchronization with Google via separate activity "Google events". How to do it:

- 1. Using *CRM Settings > Picklist Editor* create for the "Events" new Activity Type called "Google events" (you can name it as you wish).
- 2. In the Google calendar create new separate calendar in the example the name was used ITS4You meetings (again, you can name it according to your needs).
- 3. Set up synchronization with calendar.
- 4. As you can see "Google events" are visible in Calendar 4You in separate activity type and color as well.

This approach is recommended in case you don't want to mix original vtiger activities with imported events from the Google account. It is also suitable in case you don't need to synchronize your activities with Google anymore and you would like to "clear" vtiger.



Picture 6.1 Synchronization with Google in separate activity type

# **Change log of Calendar 4You**

- January 2015: **540.4.0** 
  - Google synchronization fixed (chapter 4.2.3)

# **Change log of Manual for Calendar 4You**

• January 2015: first initiate of manual based on Calendar 4You version: 540.4.0