

2.2.Events

In cases where site visits or clarifications from the project owner are required to gain a comprehensive understanding of the project scope and requirements, the system facilitates the structured scheduling and tracking of the relevant activities.

Registering an Event.

Users can schedule events in two ways:

1. **From the Lead document** – By clicking the corresponding button (Phone Call, Email, Meeting), a new event is created with the basic information and customer details automatically filled from the Lead

The screenshot shows a lead document titled "Lead qSLD24-00000006 dated 4/22/2024 3:53:15 PM". Below the title, there are several buttons: "Save and close", "Save", "Create project", "Phone Call", "E-mail", and "Meeting". The "Phone Call", "E-mail", and "Meeting" buttons are highlighted with a red box. Below the buttons, there are fields for "Status" (set to "Site Visit") and "Deal Pipeline" (set to "General").

2. **From the Events list screen** – By using the **Create** button, users can manually enter all the required information for the new event.

The screenshot shows the "Events" list screen. At the top, there is a "Create" button highlighted with a red box. Below it, there is a table of events with columns for "Subject", "Company", and "State". The table contains several rows of event data.

Filling in Event details.

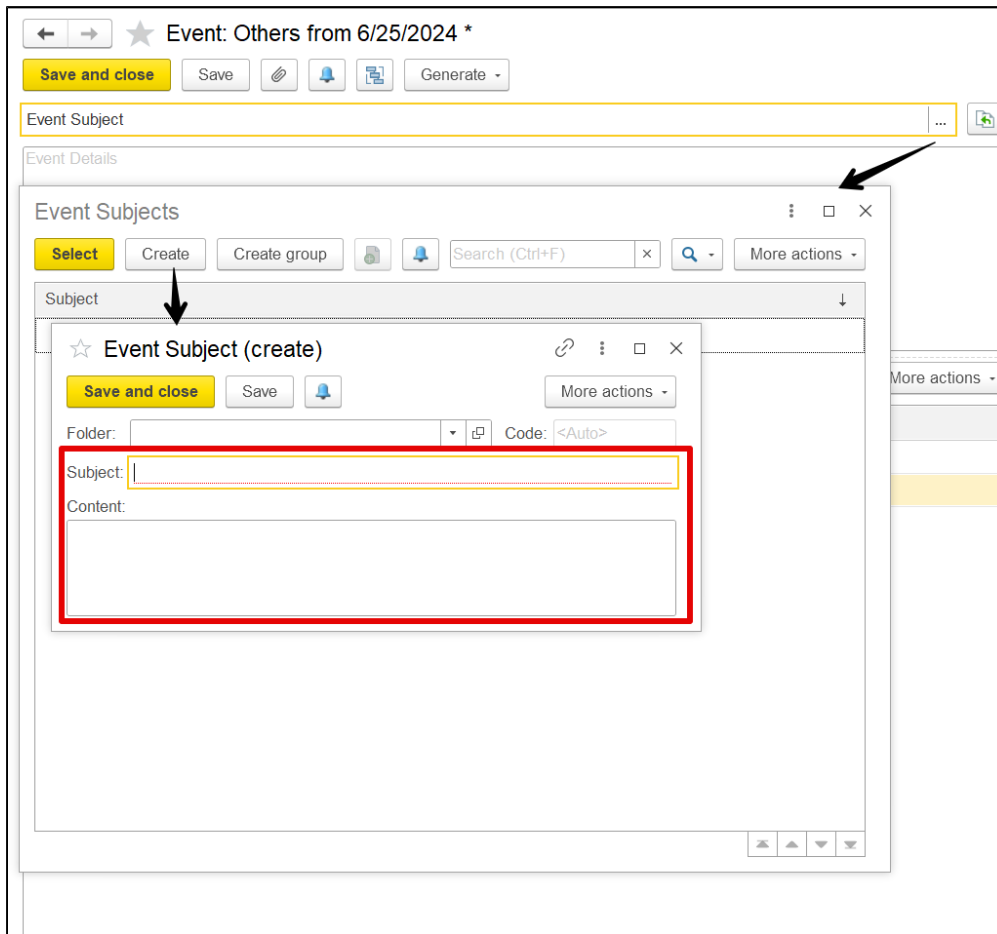
The screenshot shows the "Event: E-mail from 8/16/2023 *" details form. The form includes several sections:

- Event Type:** E-mail
- State:** Planned
- Begin:** 9/ 9/2023 11:50
- End:** 9/ 9/2023 12:20
- Company:** Osama Syed
- Contact Info:** 457312550, OsamaSyed@gmail.com
- Project:** (Empty)
- Lead:** Lead MELD23-00000004 dated 8/16/2023 11:48:58 AM
- Business Activity:** (Empty)
- Basis:** Lead MELD23-00000004 dated 8/16/2023 11:48:58 AM
- Calendar:** (Empty)

At the bottom, there is a "Recorded" status, "Administrator" as the user, "Yusuf" as the responsible person, and "8/16/2023 11:50:44 AM" as the registration date.

- **Incoming / Outgoing** – Choose if the event is incoming (received) or outgoing (sent).
- **Important** – Tick this box if the event is important. It will be marked in red.
- **Event Type** – Choose the type of activity (E-mail, Private Meeting, or Phone Call).
- **State** – Select the status: Planned, Completed, or Canceled.
- **Begin / End** – Set the start and end date and time of the event.
- **Company** – The name of the company this event is about.
- **Contact Info** – Shows phone number and email of the contact.

- **Project** – Optional. Link to a related project.
- **Lead** – If the event is connected to a lead, it will appear here.
- **Business Activity** – Optional. Add notes about the related business task.
- **Basis** – Shows the document the event is based on. Filled automatically if linked to something like a Lead.
- **Calendar** – Choose users who should see this event on their calendar (*CRM Service Tools Calendar*).
- **Subject** – A short title for the event (e.g., "Send BOQ & Quotation").
- **Content** – Detailed instructions or notes (e.g., "Prepare and send proposal to client. Don't forget to attach BOQ!").



- **Contact Persons** - the table contains a list of people taking part in the event. Table field:

Contact	How to Contact
Osama	48297972, Osama@gmail.com

- **How to Contact** - contact information of the participants.
- **Contact Person** - a reference to the contact person.
- **Responsible** _ Person handling the event. Can be changed.
- **Registration Date** – Date and time when the event was created.

Responsible: Yusuf Registration Date: 6/25/2024 3:43:21 PM

Track Events.

To access all events and check their statuses, navigate through **CRM CRM Documents Events**.

Event Type	Important	Period	Subject	State	Project	Responsible
Phone Call	No	25.08.23 11:47	Collect requirements	Planned		Yusuf
		25.08.23 12:17	Ahmed			
Private Meeting	No	22.08.23 11:48	Site visit	Planned		Yusuf
		22.08.23 12:18	Damac			
Others	No	25.06.24 00:00	Urgent	Planned	JBT Test	Yusuf
		29.06.24 00:00	Osama Syed			
E-mail	Yes	09.09.23 11:50	Send BOQ & Quotation	Planned		Yusuf
		09.09.23 12:20	Osama Syed			

The **Events list** displays all registered events. To simplify the search, users can apply filters available on the top panel, such as **Company**, **Employee**, **Event Type**, or **Status**.

Additionally, the **Text Search** field allows users to find events by entering a keyword or phrase that matches any column data.