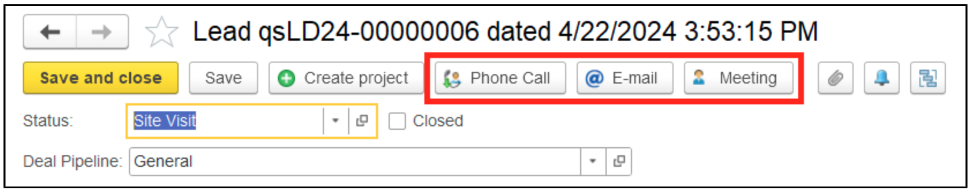
2.2.Events

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.

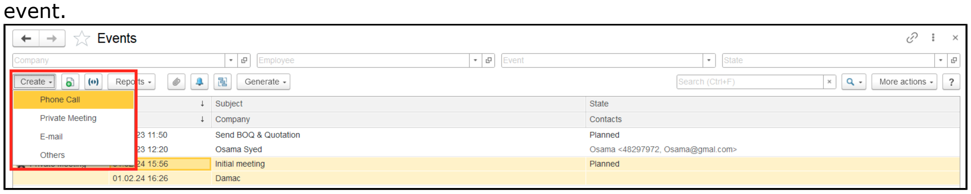
Registering an Event.

Users can schedule events in two ways:

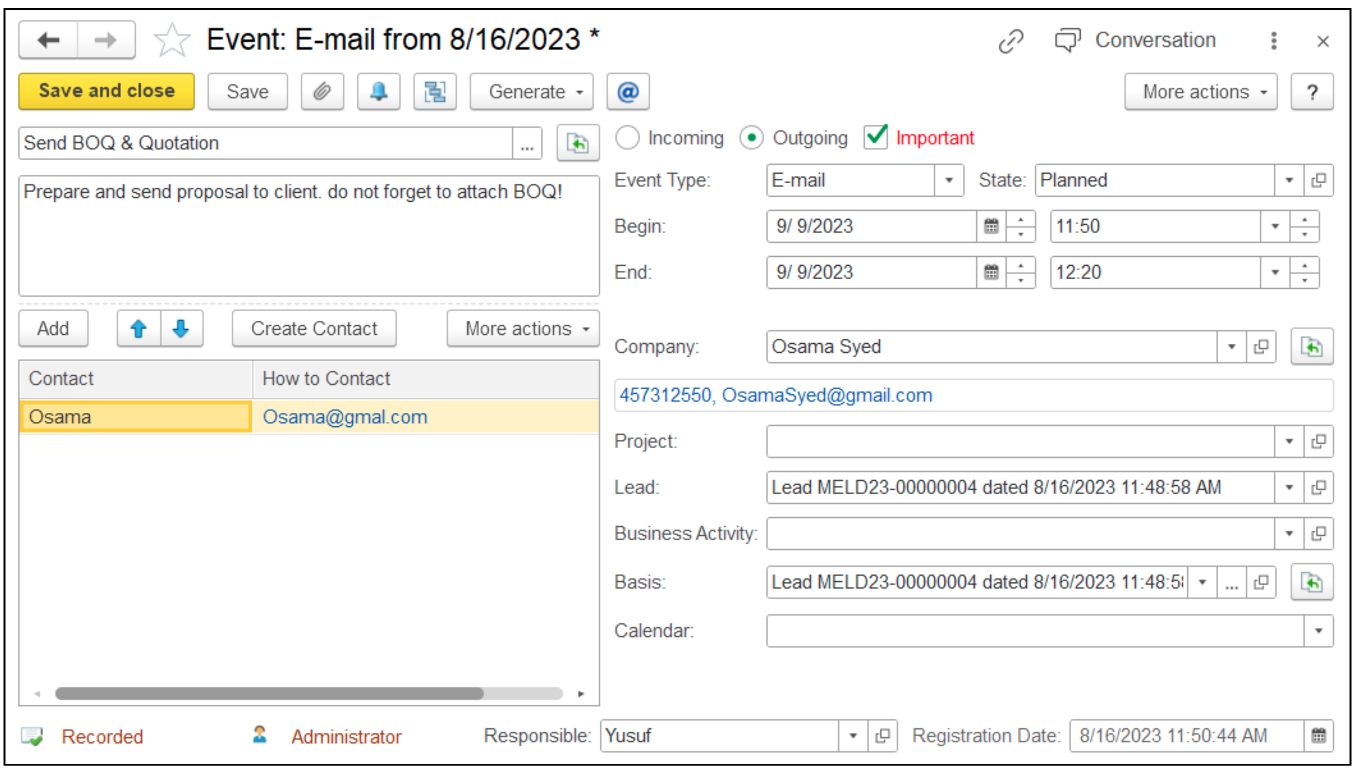
1. **From the Lead document** – By clicking the corresponding button (Phone Call, Email, Meeting), a new event is created with the basic information and customer details automatically filled from the Lead



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

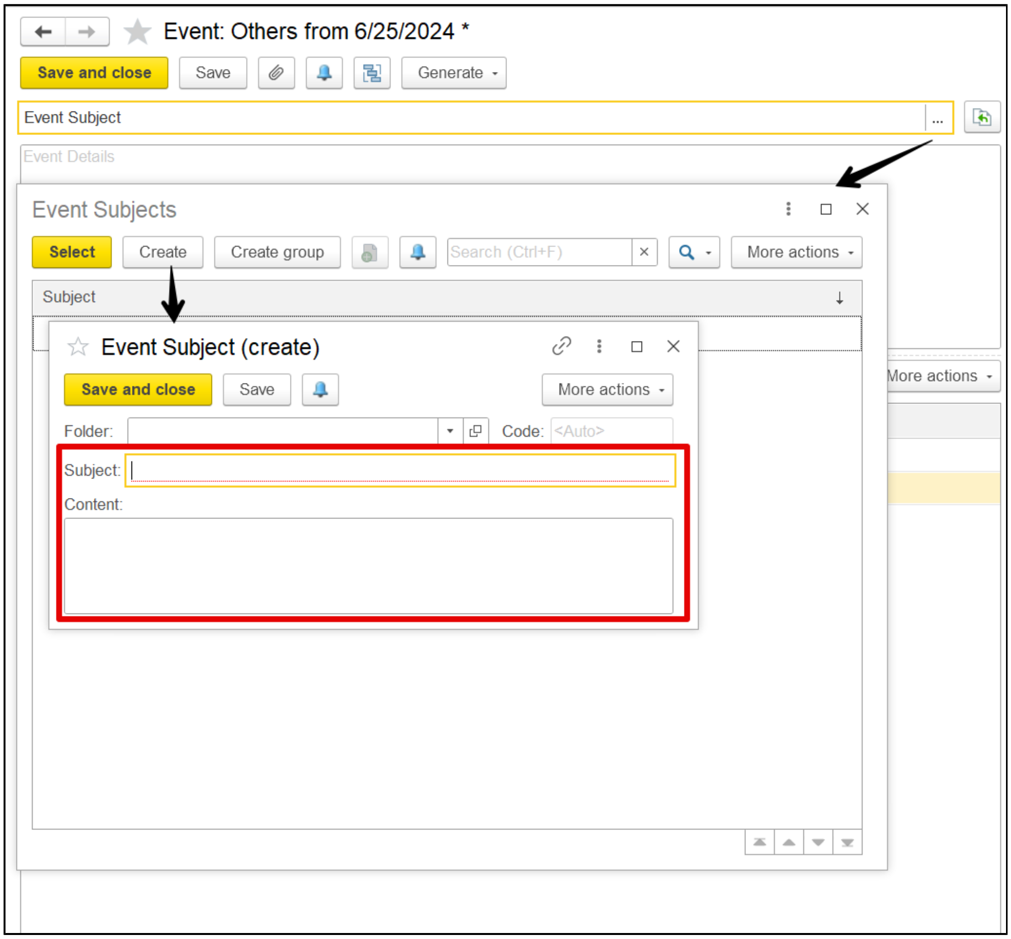


Filling in Event details.

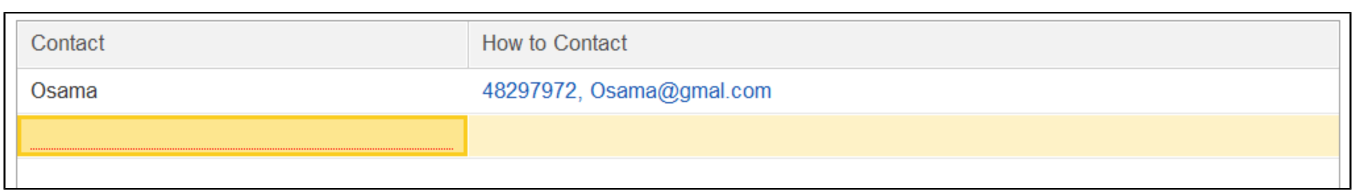


- **Incoming / Outgoing** – Choose if the event is incoming (received) or outgoing (sent).
- **Important** – Tick this box if the event is important. It will be marked in red.
- **Event Type** – Choose the type of activity (E-mail, Private Meeting, or Phone Call).
- **State** – Select the status: Planned, 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:

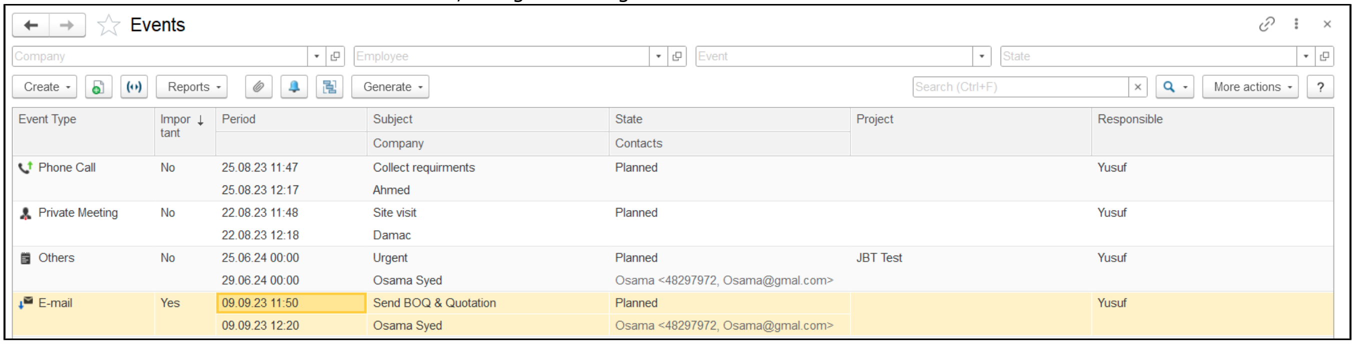


  - **How to Contact** - contact information of the participants.
  - **Contact Person** - a reference to the contact person.

- **Responsible** _ Person handling the event. Can be changed.
- **Registration Date** – Date and time when the event was created.

Track Events.

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



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.