

Calendar Feature for Public Adjuster CRM

Overview

The Calendar feature provides comprehensive calendar functionality for your Public Adjuster CRM application. It enables users to schedule appointments, set reminders, and manage their daily activities efficiently. The calendar integrates with Monday.com items, allowing users to associate calendar events with specific claims, clients, or other Monday.com board items.

Key Features

- **Multiple calendar views:** Month, week, and day views
- **Event creation and management:** Create, edit, and delete events
- **Event types:** Appointments, meetings, tasks, follow-ups, and other
- **Reminders:** Set reminders for upcoming events
- **Recurring events:** Schedule repeating events (daily, weekly, monthly, yearly)
- **Integration with Monday.com items:** Link events to specific Monday.com items
- **Import/Export:** Import and export events using iCalendar format (.ics)
- **Color coding:** Visually distinguish different types of events

Installation Requirements

The calendar feature requires the following additional Python packages:

```
bash
pip install tkcalendar icalendar
```

Structure

The calendar feature consists of several components:

1. **Data Models** (`calendar_models.py`)
 - `CalendarEvent`: Represents a calendar event
 - `EventReminder`: Represents a reminder for an event
2. **Controller** (`calendar_controller.py`)
 - `CalendarController`: Handles business logic for calendar operations
3. **UI Components** (`calendar_ui_components.py`)

- `CalendarViewComponent`: Main calendar display
- `EventDialog`: Dialog for creating/editing events

4. **Integration** (`calendar_integration.py`)

- `ReminderService`: Background service for checking and showing reminders
- Integration functions for adding calendar functionality to the main app

5. **Tests** (`calendar_tests.py`)

- Unit tests for calendar functionality

Usage Guide

Opening the Calendar

To open the calendar, click on the "Calendar" menu in the main application, then select "View Calendar". The calendar will open in a new window with the current month view displayed.

Changing Views

You can switch between different calendar views:

- **Month View**: Default view showing the entire month
- **Week View**: Shows a single week with hourly time slots
- **Day View**: Shows a single day with detailed hourly schedule

Select the desired view using the radio buttons at the top of the calendar window.

Creating Events

There are several ways to create a new event:

1. **From the Calendar menu**: Click "Calendar" > "New Event"
2. **From the Calendar view**: Click the "New Event" button
3. **From Month view**: Click on a date to show events for that day, then click "New Event"
4. **From Week/Day view**: Click directly on a time slot to create an event at that time

In the event creation dialog, you can enter:

- Event title and description
- Start and end date/time
- Location
- Event type

- Color coding
- Link to Monday.com item
- Recurrence pattern
- Reminders

Editing or Deleting Events

To edit or delete an existing event:

1. Click on a date in the month view to see events for that day
2. Click the "Edit" or "Delete" button next to the event

Importing and Exporting Events

- **Import:** Click "Calendar" > "Import Events" and select an iCalendar (.ics) file
- **Export:** Click "Calendar" > "Export Events" to export your events to an iCalendar file that can be used with other calendar applications like Google Calendar, Outlook, or Apple Calendar

Reminders

When you create an event, you can set a reminder to notify you before the event starts. The reminder will appear as a popup notification at the specified time.

Integration with Monday.com Items

You can associate calendar events with specific Monday.com items:

1. When creating or editing an event, check "Link to Monday.com item"
2. Select the board and item from the dropdown menus
3. The event will now be linked to that item

You can view all events for a specific item by selecting it in your Monday.com boards and checking the "Events" section.

Customization

The calendar feature can be customized by modifying:

- Color schemes in `calendar_ui_components.py`
- Default event durations and reminder times
- Available event types

Troubleshooting

Common issues:

1. **Calendar doesn't appear:** Ensure you have installed the required `tkcalendar` package
2. **Events don't save:** Check database permissions and ensure the sync manager is properly initialized
3. **Reminders don't show:** Make sure the reminder service is running and check notification settings

Developer Notes

When extending the calendar functionality:

1. Add new event types to the `CalendarEvent` model's constraints
2. Update the UI components to support new features
3. Add appropriate tests for new functionality
4. Consider performance optimizations for large numbers of events

The calendar feature is designed to work seamlessly with the existing application architecture, leveraging the same database and synchronization mechanisms used for Monday.com data.