

Diary

The agenda of SaltOS allows you to easily manage your meetings and events. You can relate the phonebook entries with a client, project, budget, etc. well as assign them to multiple users.

SaltOS will automatically remind the upcoming events.

The two calendar views

The agenda of SaltOS can be found in two ways: as a list or as a calendar.

Listing

The first looks like any list of SaltOS, showing or users assigned, start and end of the event, client or related project, event name and its type and condition.

In this view you can create a new event by clicking the corresponding button in the lower left corner, browse the list of controls in the lower right corner and search for an event by simply searching.





Listado de eventos - Suite de Gestión Empresarial - SaltOS v3.5 r8483										Inicio	Correo	Agenda	RSS	Perfil	Soporte	Acerca	Cerrar						
General	Listado de eventos			Opciones de filtro		Calendario de eventos			Ayuda														
Nuevo evento										Buscar										Q Buscar	Google Calendar	Notificaciones	Reset
	Cód.	Usuario	Inicio	Fin	Cliente	Proyecto	Evento	Tipo de evento		Estado													
	00100	Administrador (admin)	2013-11-15 03:59:46	2013-11-15 05:59:46	posuere cubilla Cura...	ut cursus luctus, id...	scelerisque dui. Suspendisse ac metus vitae velit	Visita técnica		Acabada													
	00099	Administrador (admin)	2013-12-05 01:30:31	2013-12-05 03:30:31	[Sin cliente asociad...]	[Sin proyecto asocia...]	egetas, urna justo faucibus lectus, a sollicitudin orci	Otras reuniones		Programada													
	00098	Administrador (admin)	2013-04-21 04:52:08	2013-04-21 06:52:08	Integer aliquam adip...	neque. Nullam ut nis...	montes, nascetur ridiculus mus. Donec	Reunión técnica		Programada													
	00097	Administrador (admin)	2013-10-17 23:00:13	2013-10-18 01:00:13	at, libero. Morbi ac...	facilisis eget, ipso...	mi lorem, vehicula et, rutrum eu, ultrices sit	Llamada seguimiento		Programada													
	00096	Administrador (admin)	2012-02-28 14:26:48	2012-02-28 16:26:48	posuere cubilla Cura...	ut cursus luctus, id...	non dui nec urna suscipit	Otras reuniones		Acabada													
	00095	Administrador (admin)	2013-11-16 13:47:22	2013-11-16 15:47:22	telus, Aenean eget...	>Lorem ipsum dolor si...	eget lacus. Mauris non dui nec urna suscipit	Visita técnica		Cancelada													
	00094	Administrador (admin)	2014-01-05 17:26:33	2014-01-05 19:26:33	tincidunt. Donec vi...	sem magna nec quam...	dolor dapibus gravida. Aliquam tincidunt, nunc ac mattis ornare,	Llamada comercial		Programada													
	00093	Administrador (admin)	2013-10-05 05:31:00	2013-10-05 07:31:00	[Sin cliente asociad...]	[Sin proyecto asocia...]	nascetur ridiculus mus. Aenean eget magna,	Email comercial		Por confirmar													
	00092	Administrador (admin)	2013-09-01 22:12:14	2013-09-02 00:12:14	consectetur adips...	Etiam imperdiet dict...	erat, eget tincidunt dui augue eu	Visita técnica		Cancelada													
	00091	Administrador (admin)	2013-03-23 02:02:11	2013-03-23 04:02:11	amet, faucibus ut, n...	penatibus et magnis...	nisi. Cum sociis natoque penatibus et magnis dis	Otras reuniones		Cancelada													
	00090	Administrador (admin)	2013-09-02 23:34:46	2013-09-03 01:34:46	at, libero. Morbi ac...	facilisis eget, ipso...	sem, vitae aliquam eros turpis	Email comercial		Cancelada													
	00089	Administrador (admin)	2013-10-07 11:37:59	2013-10-07 13:37:59	Integer aliquam adip...	mauris sit amet lore...	sit amet, dapibus id, blandit at, nisi.	Llamada seguimiento		Cancelada													
	00088	Administrador (admin)	2013-11-26 05:04:01	2013-11-26 07:04:01	amet, faucibus ut, n...	penatibus et magnis...	egetas. Fusce aliquet magna a neque. Nullam	Visita comercial		Acabada													
	00087	Administrador (admin)	2012-05-07 00:34:30	2012-05-07 02:34:30	Integer aliquam adip...	neque. Nullam ut nis...	cursus et, eros. Proin ultrices. Duis volutpat nunc	Otras visitas		Programada													
	00086	Administrador (admin)	2013-11-12 03:18:11	2013-11-12 05:18:11	amet, faucibus ut, n...	penatibus et magnis...	ipsum. Suspendisse sagittis. Nullam vitae	Visita técnica		Acabada													
	00085	Administrador (admin)	2013-07-17 21:42:13	2013-07-17 23:42:13	consectetur adips...	Etiam imperdiet dict...	Cras sed leo. Cras vehicula aliquet libero. Integer	Otras visitas		Acabada													
	00084	Administrador (admin)	2013-05-13 11:40:27	2013-05-13 13:40:27	Integer aliquam adip...	mauris sit amet lore...	blandit at, nisi. Cum sociis natoque penatibus et magnis dis	Reunión técnica		Acabada													
	00083	Administrador (admin)	2013-05-20 23:57:06	2013-05-21 01:57:06	telus, Aenean eget...	>Lorem ipsum dolor si...	pharetra. Nam ac nulla. In tincidunt	Visita comercial		Cancelada													
	00082	Administrador (admin)	2014-02-16 21:56:09	2014-02-16 23:56:09	tincidunt. Donec vi...	sem magna nec quam...	lectus convallis est, vitae sodales nisi magna sed dui.	Llamada técnica		Acabada													
	00081	Administrador (admin)	2012-07-29 08:36:12	2012-07-29 10:36:12	[Sin cliente asociad...]	[Sin proyecto asocia...]	aliquam arcu. Aliquam ultrices laculis odio. Nam interdum	Email comercial		Programada													
	00080	Administrador (admin)	2013-12-11 21:57:44	2013-12-11 23:57:44	posuere cubilla Cura...	ut cursus luctus, id...	Fusce aliquam, enim nec tempus scelerisque,	Llamada comercial		Programada													
	00079	Administrador (admin)	2012-06-12 08:49:54	2012-06-12 10:49:54	telus, Aenean eget...	>Lorem ipsum dolor si...	sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus	Reunión técnica		Por confirmar													
	00078	Administrador (admin)	2013-08-02 03:10:33	2013-08-02 05:10:33	Integer aliquam adip...	neque. Nullam ut nis...	vel, convallis in, cursus et,	Visita comercial		Por confirmar													
	00077	Administrador (admin)	2012-07-07 15:19:39	2012-07-07 17:19:39	at, libero. Morbi ac...	facilisis eget, ipso...	torquent per conubia nostra, per inceptos hymenaeos. Mauris ut	Otros eventos		Por confirmar													
	00076	Administrador (admin)	2012-07-09 17:56:27	2012-07-09 19:56:27	Integer aliquam adip...	mauris sit amet lore...	ut, sem. Nulla interdum. Curabitur dictum. Phasellus in feis. Nulla	Otras reuniones		Por confirmar													
	00075	Administrador (admin)	2013-03-23 19:19:15	2013-03-23 21:19:15	Integer aliquam adip...	neque. Nullam ut nis...	ac mattis velit justo nec ante. Maecenas mi feis,	Otras reuniones		Programada													

- **Ref.:** Numeric code that identifies the event.
- **User:** User who created the event.
- **Home:** Date and time of start of the event.
- **End:** Date and time of end of event.
- **Customer:** Customer linked to this event.
- **Project:** Project linked to this event.
- **Event:** Title or subject of the event.

- **Event type:** Event type (calls, meetings, visits, emails, events).
- **State:** State where you will find the event (Scheduled, TBC, Finished, Cancelled).

Listing Options

On each record you can perform a series of actions that are represented by the following icons:

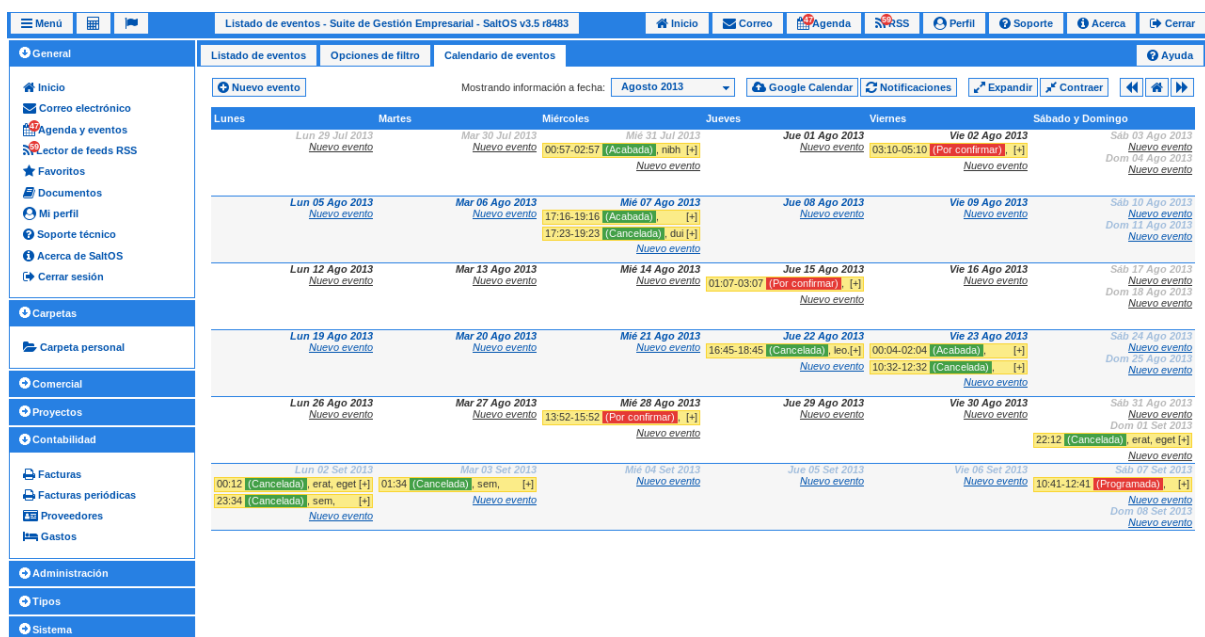
-    Check / Edit / Delete Record.
-  This action will lead to the creation of a new record using data from the current.

Filter Options

For more information about the filter options listed in the [ayuda general](#).

Calendar

The view *Calendar* will display the current month as a grid, with one day per column. You can create a new event by clicking *New event* box on the relevant date. To display another calendar month, select it from the drop *Showing information to date*. If you want to navigate to the previous or next month, click the arrows at the top right corner. To return to the current month, click the icon located between the two arrows.



The screenshot displays the 'Listado de eventos' application interface. The top navigation bar includes links for 'Inicio', 'Correo', 'Agenda', 'RSS', 'Perfil', 'Soporte', 'Acerca', and 'Cerrar'. The left sidebar contains a menu with options like 'General', 'Carpetas', 'Comercial', 'Proyectos', 'Contabilidad', 'Facturas', 'Proveedores', 'Gastos', 'Administración', 'Tipos', and 'Sistema'. The main content area shows the 'Listado de eventos' tab selected, displaying a calendar for August 2013. The calendar grid shows events for each day, with details such as time, location, and status (e.g., 'Cancelada', 'Por confirmar'). Navigation controls at the top of the calendar allow switching months and viewing options.

To expand or collapse the detail of all the events listed, click the corresponding button in the upper right corner. You can also restart notifications by clicking the button *Notifications*.

Event Form

This is the application of events, with it you can add, modify and view all data from the various events held in the state, the information is classified in different tabs: main data, assigned users, comments, file attachments, data on the registry modifications, ...

Event Info tab

In this tab you can view and modify the main data events. Here we relate all information fields.

Alta de un nuevo evento - Suite de Gestión Empresarial - SaltOS v3.5 r8483

Inicio Correo Agenda RSS Perfil Soporte Acerca Cerrar

General

Inicio

Correo electrónico

Agenda y eventos

Lector de feeds RSS

Favoritos

Documentos

Mi perfil

Soporte técnico

Acerca de SaltOS

Cerrar sesión

Carpetas

Carpeta personal

Comercial

Proyectos

Contabilidad

Administración

Tipos

Sistema

Datos del evento Usuarios asignados Nuevos ficheros adjuntos Carpetas Ayuda

Campaña [Sin campaña asociada]

Posible cliente [Sin posible cliente asociado]

Cliente [Sin cliente asociado]

Presupuesto [Sin presupuesto asociado]

Proyecto [Sin proyecto asociado]

(*) Inicio 2017-07-18 09:02:44

(*) Fin 2017-07-18 09:02:44

(*) Nombre

(*) Tipo de evento Otros eventos

(*) Estado Programada

(*) Descripción

Notificar 0 hora/s Antes

Notificación inicio recibida

Notificación final recibida

Crear Crear y volver aquí Cancelar

- **Campaigns:** To link the event to a particular marketing campaign.
- **Prospect:** To link the event with a possible specific customer.
- **Budget:** To link the event with a possible specific budget.
- **Customer:** To link the event with a particular customer.
- **Project:** To link the event with a specific project.
- **Home (*):** Start time of the event.
- **Fin (*):** End time of the event.
- **Event type:** Event type (calls, meetings, visits, emails, events).
- **Location:** Venue of the event.
- **State:** Current Status of the event (Default, TBC, Finishing, canceled).
- **Description (*):** Brief description of the event.
- **Report:** To indicate when we have to notify the notice.
- **I start notification received:** Checking this box will make the announcement event start disappearing.

- **Final report received:** Checking this box will notice event to disappear.

(*) **Required when creating or modifying an event fields.**

Creation

To create a new event enter the date and start time, the name (which is displayed in the listings), description, type of event and state. Note that the event is considered pending when has the status "Confirmed" or "To be confirmed" in any other shall be deemed not pending or closed.

To facilitate the introduction of the date, click the icons next to the corresponding boxes. A dialog that allows you to choose the date browsing the calendar opens. Click on the corresponding day to select the date.

You can also enter the time through a help dialog by clicking on the icon next to the text box. Select the hour and minute via buttons, to change between *AM* and *PM* click the appropriate button.

To receive notification as a reminder, enter in the box *Notify* how far in advance you want to receive the notice (in hours). If you want to be notified after the start of the event, choose "After" in the corresponding drop-down. If you do not wish to receive any notice, dial controls *Start Notification received* and *Final notification received*.

To assign the event to more users, select the tab *Assigned Users*. The event will automatically appear in the calendar of users assigned.

You can associate the event with a campaign, a potential client, an existing customer, a budget or project through the corresponding pop. When linking an event with any of these applications will appear in detail the respective content. This way you can take effective control of all meetings with a client or a project.

To attach files, you can do it on the tab *New file attachments*.

Once completed press *Create* or *Create and return here*.

Modification

When editing an event, you can enter or modify the same data during creation. Additionally you can add a comment, for example, to discuss the topics discussed during the meeting, the reason for cancellation, etc.

For an event to stop appearing as pending, change its status to *Finished*, *Canceled* or *Error*.

Consultation

In the query mode, you can view the different parameters of the event, as well as assigned users and download attachments, if any. You can also see if it has already shown the notice of initiation or termination.

You can edit the event by clicking on the button *Edit*.

New comments tab

For more information about the filter options listed in the [ayuda general](#).

Comments Tab

For more information about the filter options listed in the [ayuda general](#).

New Tab attachments

For more information about the filter options listed in the [ayuda general](#).

Attachments tab

For more information about the filter options listed in the [ayuda general](#).

Registry Data Tab

For more information about the filter options listed in the [ayuda general](#).