

## CALENDAR 4YOU FOR VTIGER CRM 5.x

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### 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:

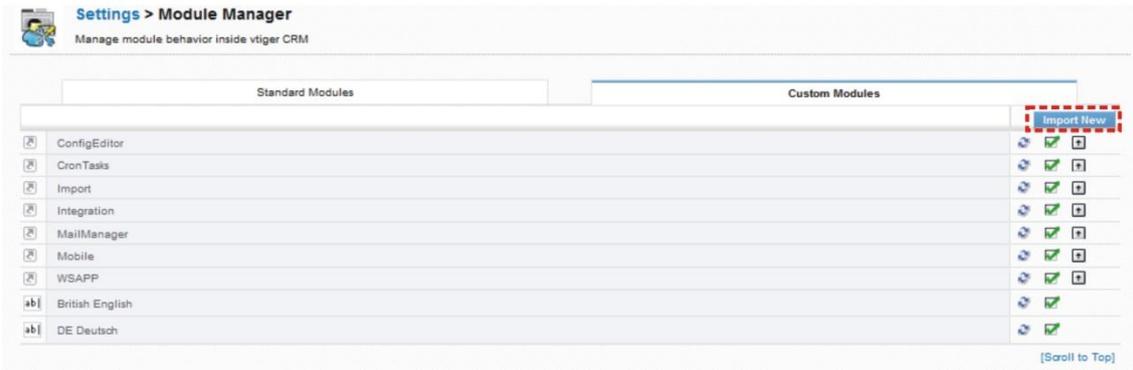
- vtigerCRM version (e.g. 5.4.0)
- Calendar 4You version (e.g. 540.2.0)
- Date and time
- Domain in md5 coding format (e.g. 916b25c201a77a6721003c0030977f3b)
- Action provided by you (INSTALL, REACTIVATE, DEACTIVATE)

# 1 How to install Calendar 4You

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

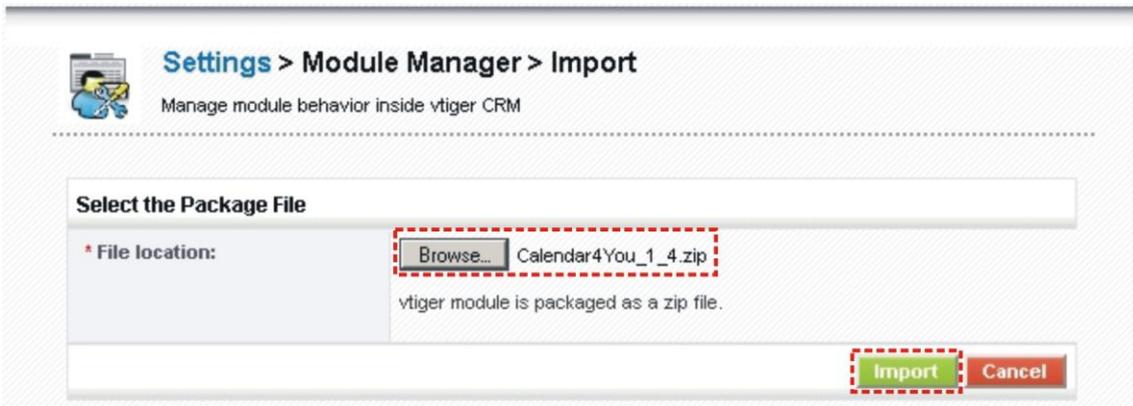
It is highly recommended to finish the installation without any interruption. For successful installation we need to exchange information (see previous chapter for details).

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



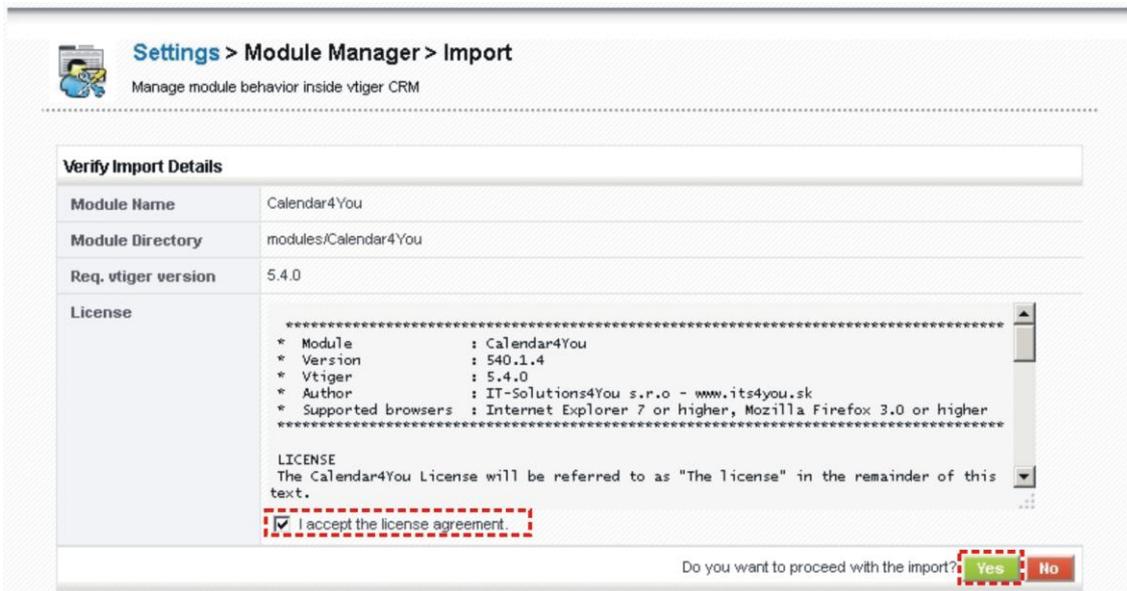
Picture 1.1 Installation of Calendar 4You – step 1

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



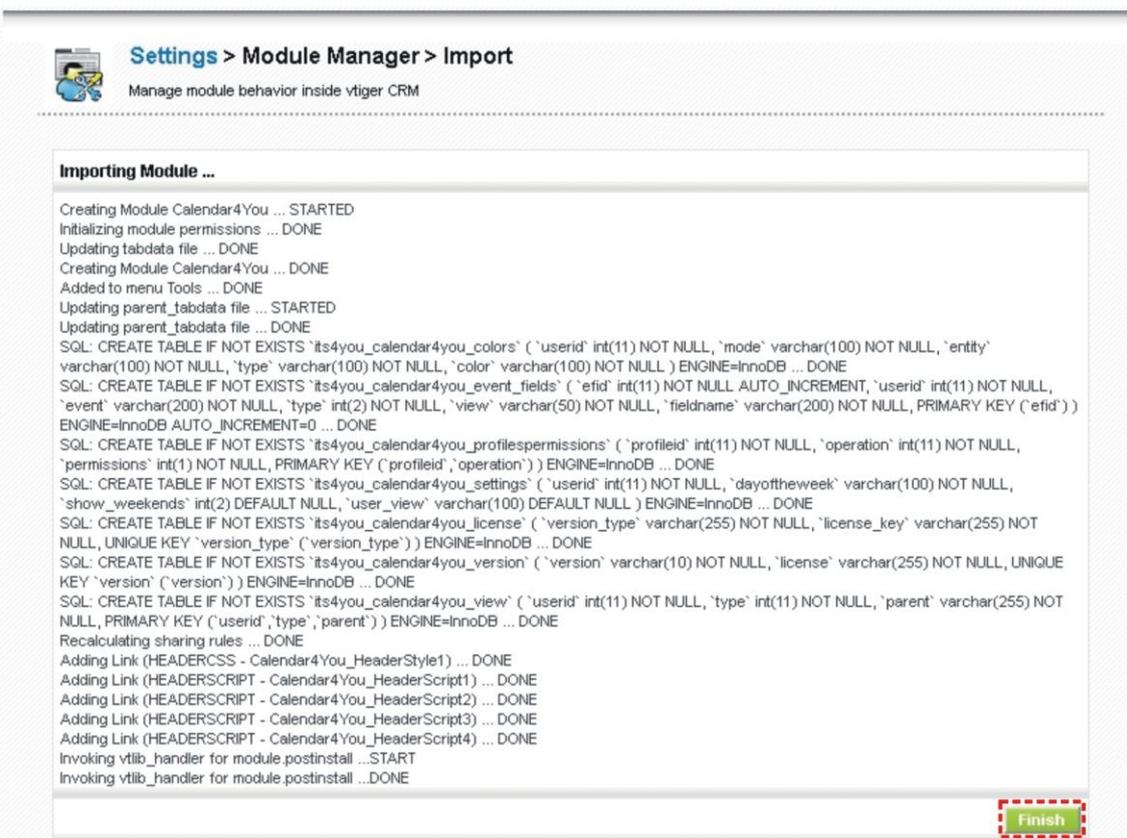
Picture 1.2 Installation of Calendar 4You – step 2

- 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.



Picture 1.3 Installation of Calendar 4You – step 3

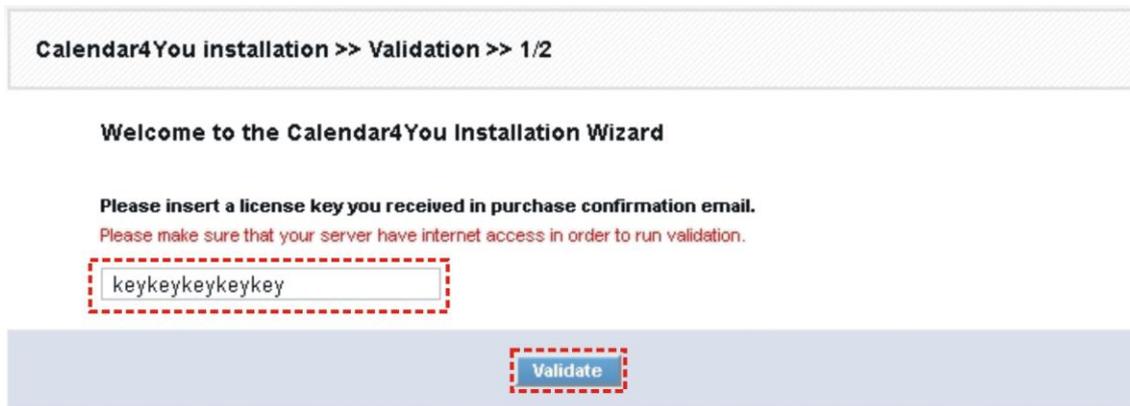
- Click on **Finish** to complete the module import.



Picture 1.4 Installation of Calendar 4You – step 4

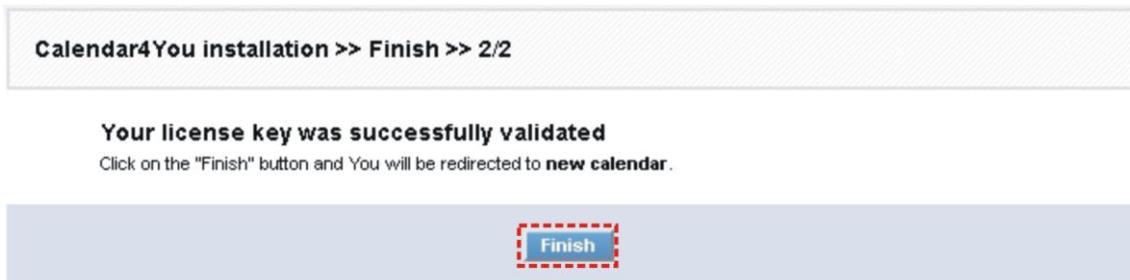
In order to finish installation, please provide following validation steps.

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



Picture 1.5 Validation step 1

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



Picture 1.6 Validation step 2 – Finish installation

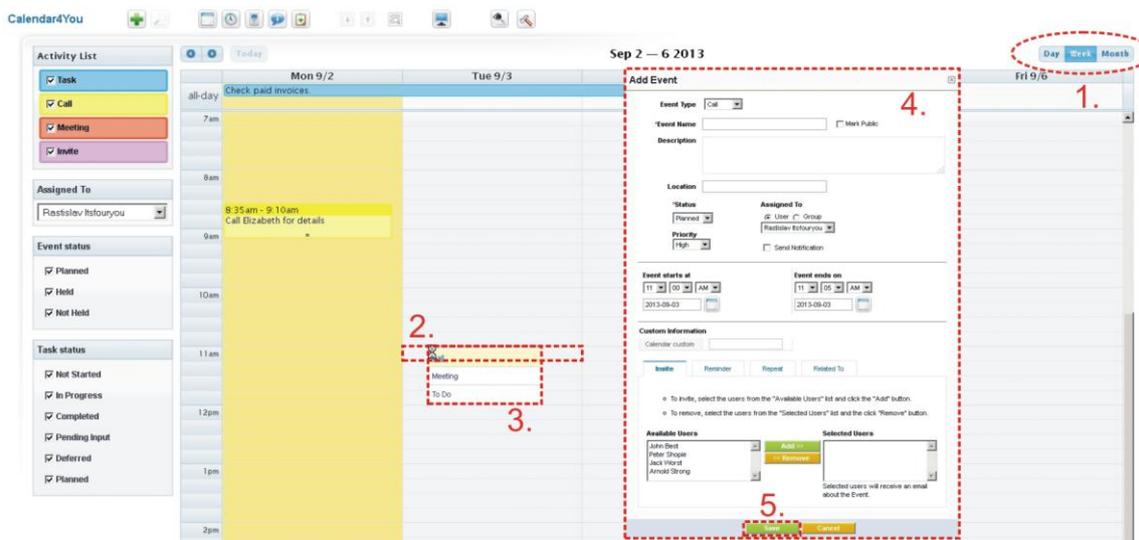
## 2 How to add activity

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).
4. The new window “Add Event” (for Call, Meeting, etc.) or “Create To Do” (for tasks) will appear on the screen.
5. Fill the form and save it using button .



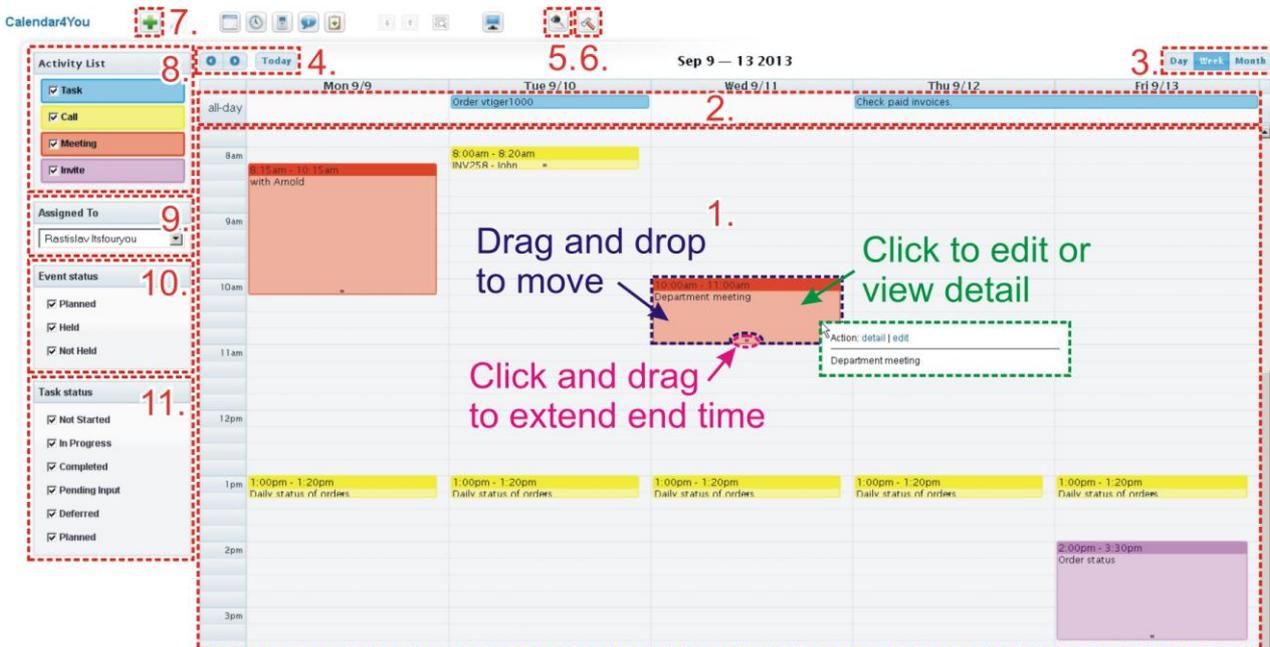
Picture 2.1 How to add new activity in Calendar View

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 [https://wiki.vtiger.com/index.php/Calendar\\_Module](https://wiki.vtiger.com/index.php/Calendar_Module) for more details.

### 3 CalendarView

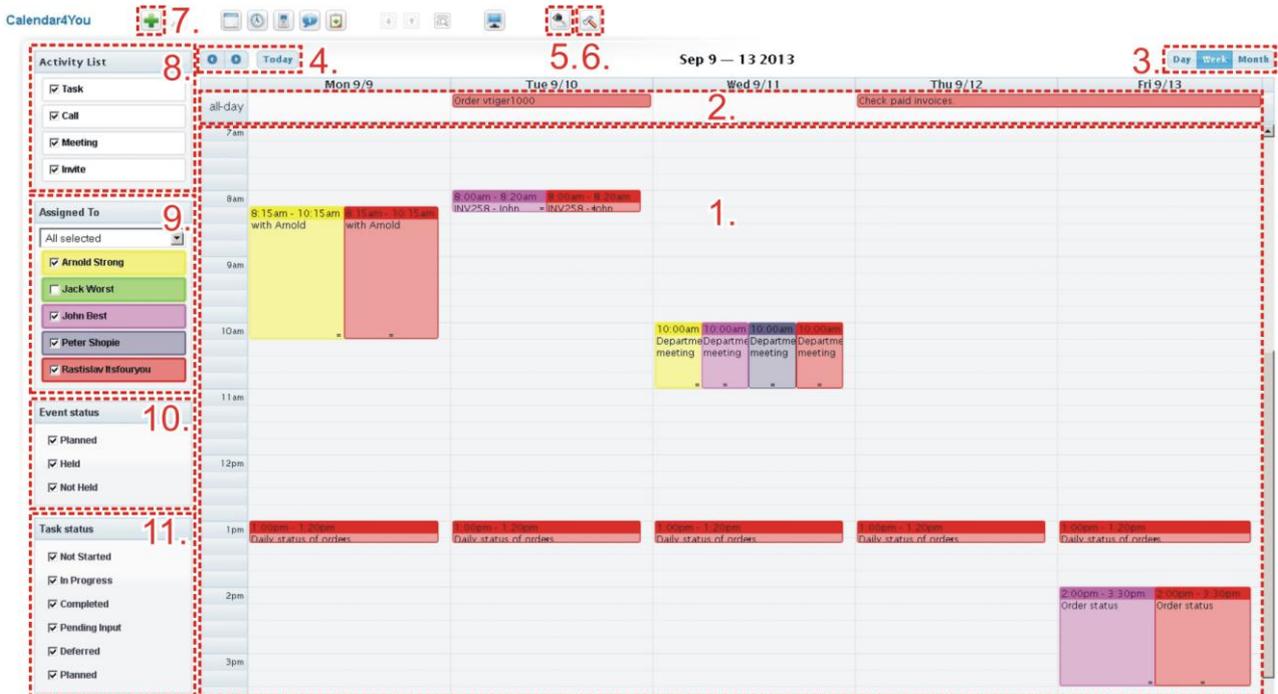
The CalendarView has several possibilities to be adjusted according to your needs and provides new functionalities. The following two pictures present some of CalendarView functions:

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.



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.



Picture 3.2 CalendarView – more users view

## 4 Calendar 4You settings

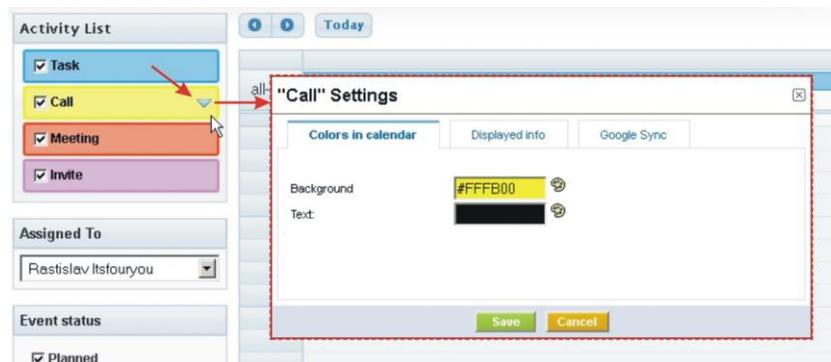
The Calendar 4You settings consist of:

- 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)

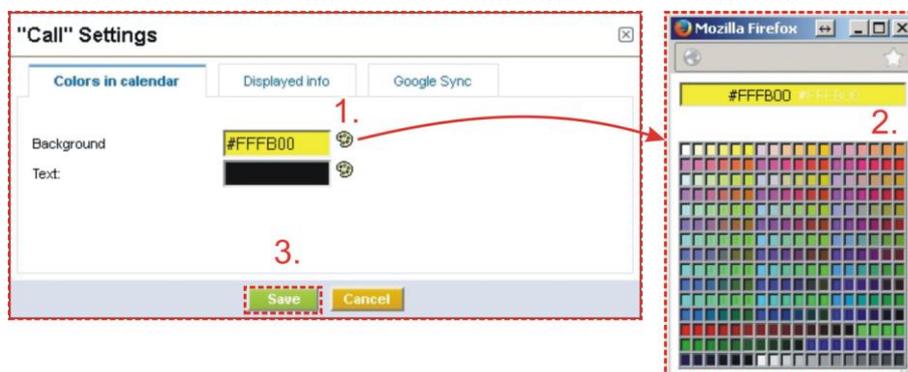


Picture 4.1 CalendarView settings initialization

#### 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:

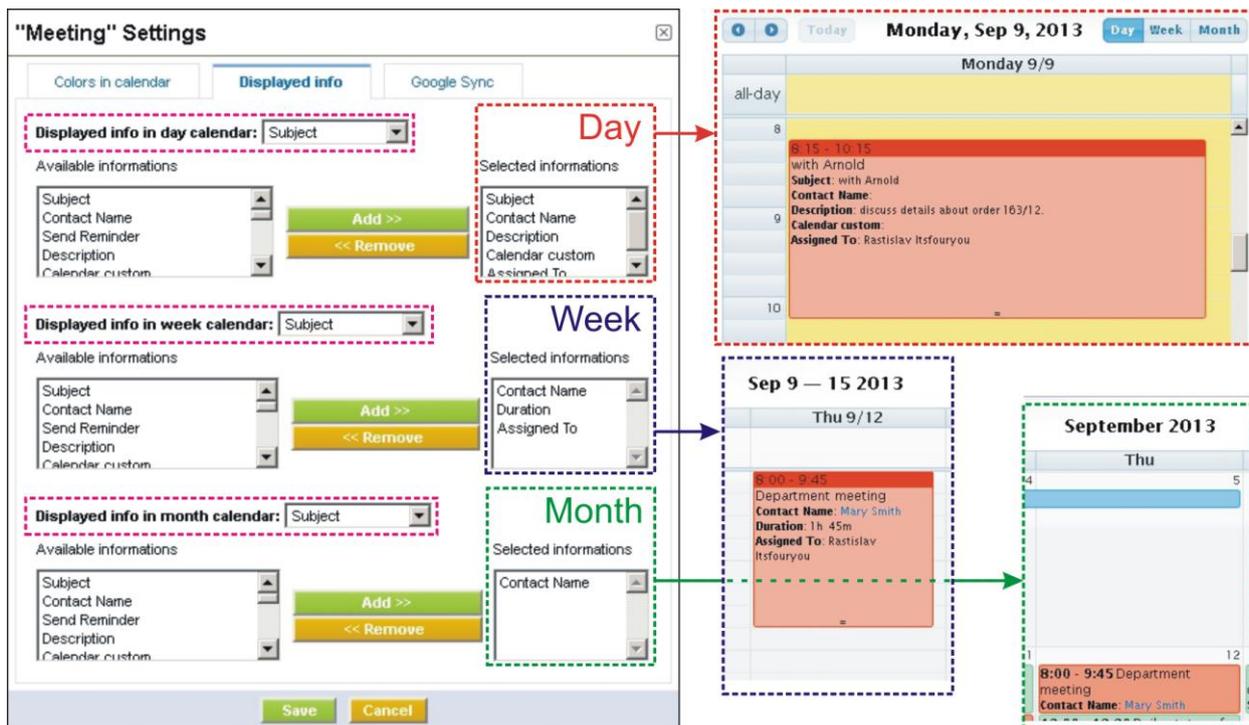
1. Go to "Colors in calendar" tab and click on icon .
2. Select the color.
3. Save the settings using button .



Picture 4.2 Colors in calendar

### 4.1.2 Displayed info

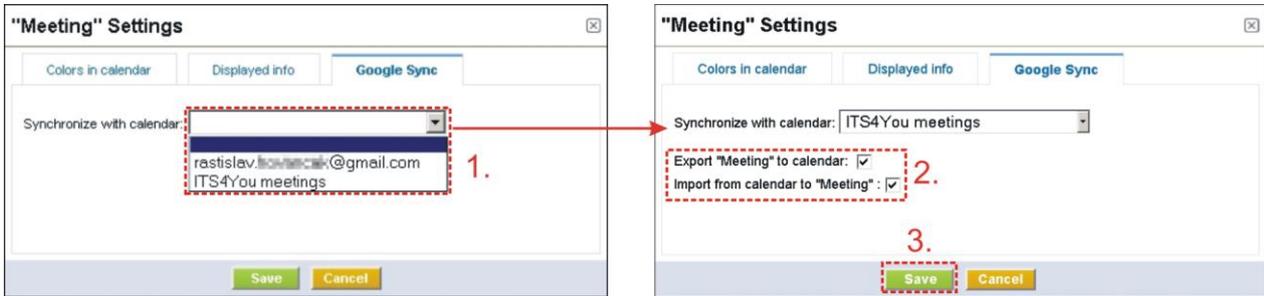
The 'Displayed info' tab allows you to define how much info is displayed in CalendarView for all single views separately, i.e. for day calendar, week calendar as well as month calendar. In addition you can define displayed info separately for each activity type. The use of this tab is simple. In order 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

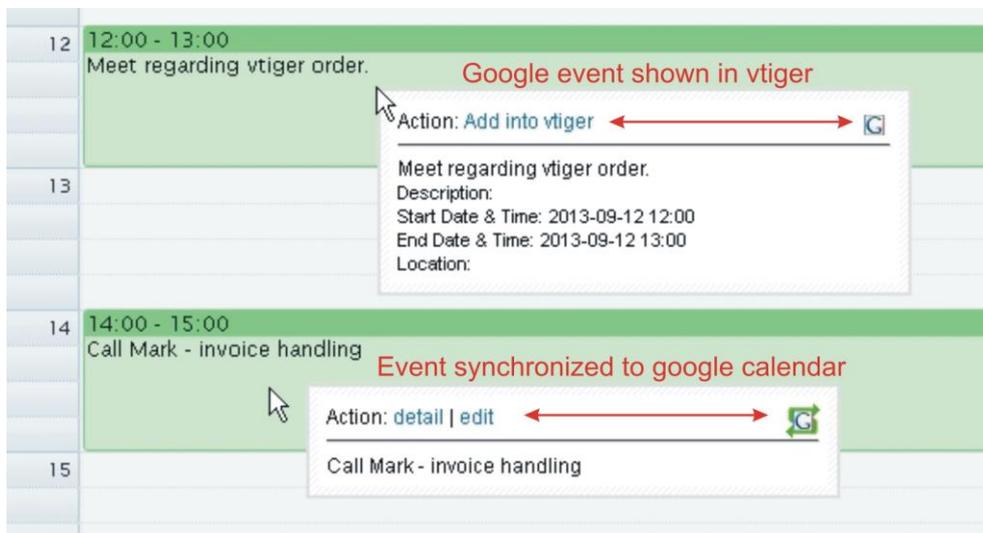
As was already mentioned, you can view or synchronize your Google events with your vtiger events using Calendar 4You. Firstly you have to set up your Google account/credentials (please refer to chapter 4.2.3 for details).



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  (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 marked with icon  and are not editable on the Calendar 4You side.
3. Click on button  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.



Picture 4.5 Synchronized/Google events in CalendarView

## 4.2 User settings

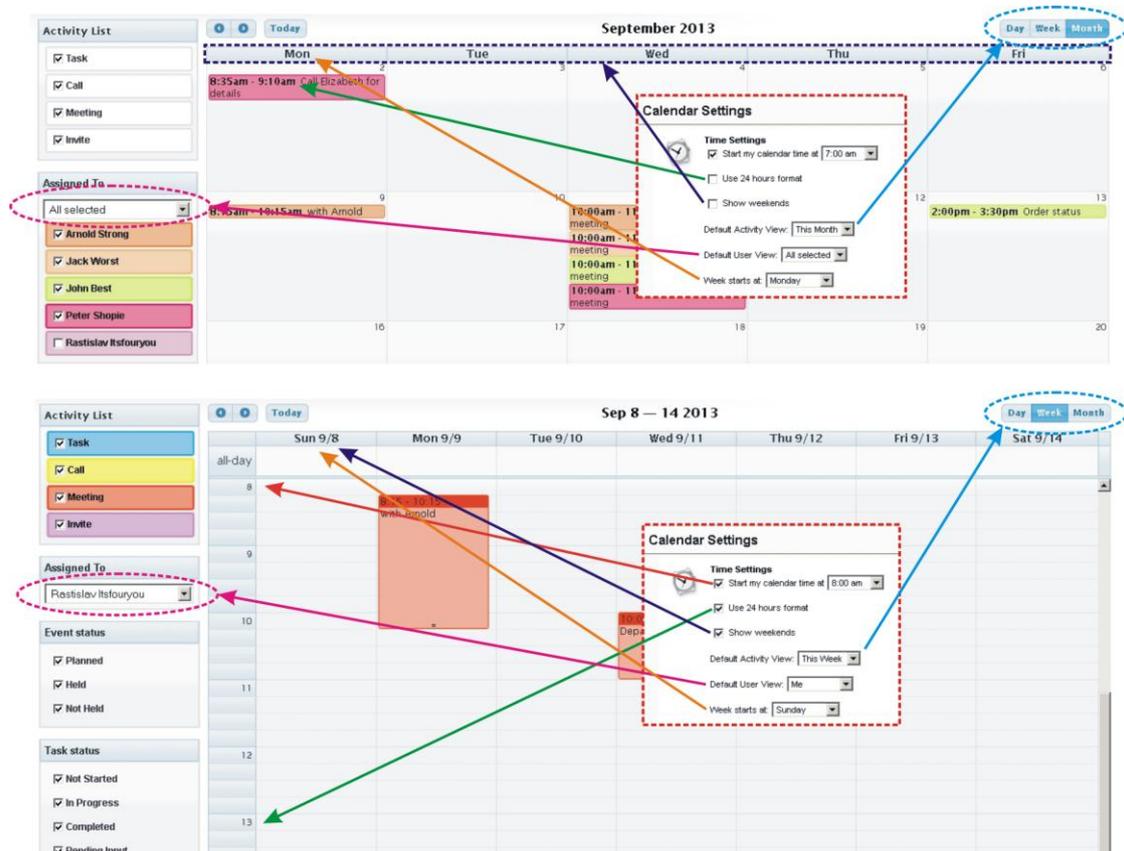
User settings part contains following:

- 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.

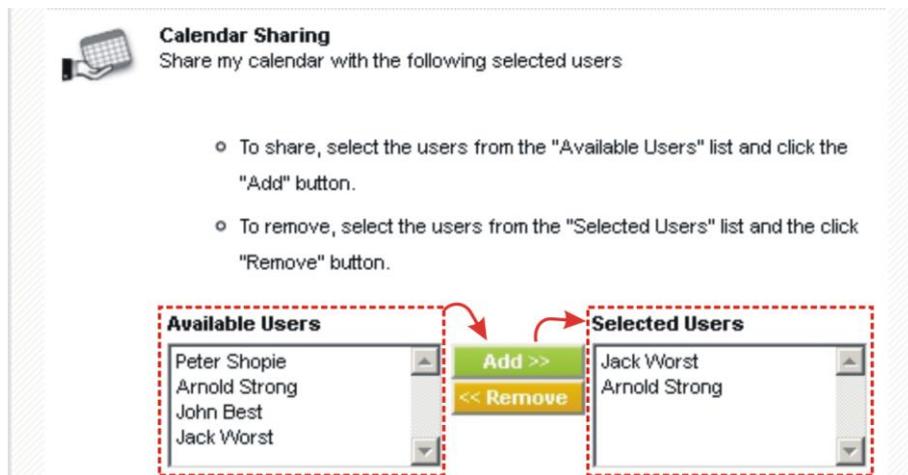
Name	Description
Start my calendar time at	Define your calendar start time. This setting is available for day and week calendar.
Use 24 hours format	Switch between 12 and 24 hours format.
Show weekends	Show/hide weekends.
Default Activity View	Define your calendar default activity view – day, week or 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.

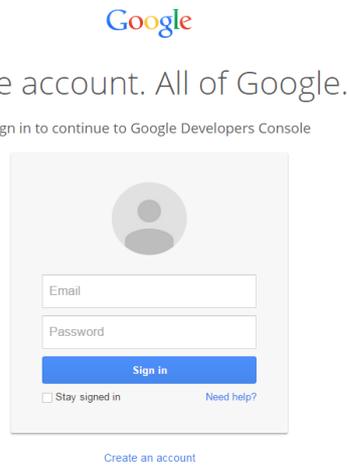


Picture 4.7 Calendar sharing

### 4.2.3 Google authentication

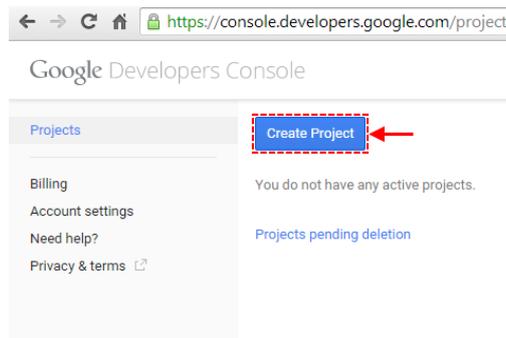
The Calendar 4You functionality “Google Sync” requires setting the Google account. Please provide following steps:

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

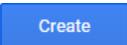


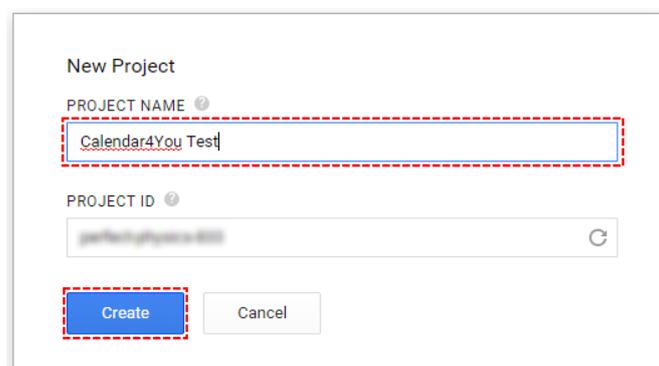
Picture 4.8 Google authentication step 1

2. Click on  button



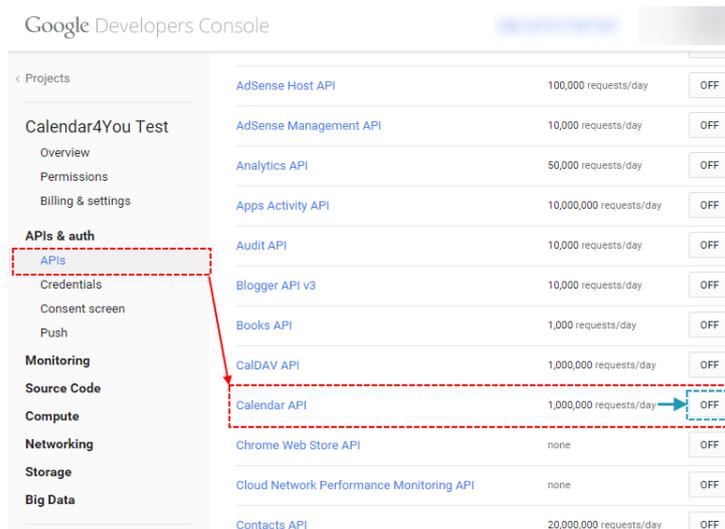
Picture 4.9 Google authentication step 2

3. Type Project name and click on  button and your project will be created



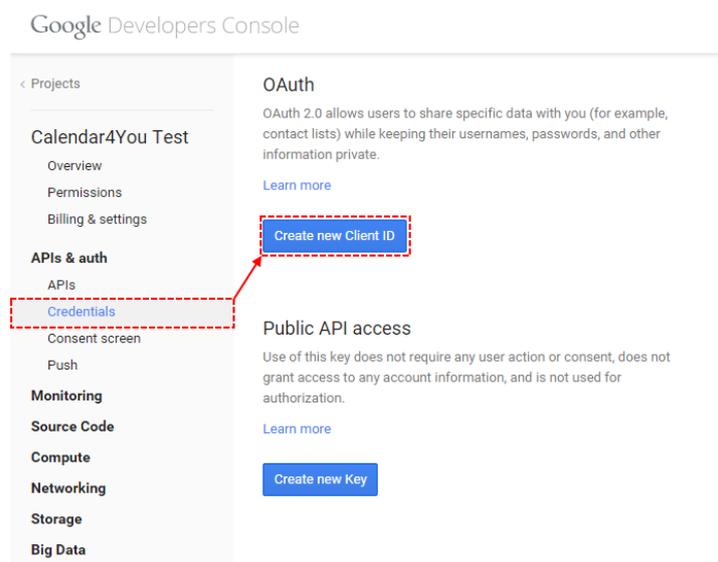
Picture 4.10 Google authentication step 3

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



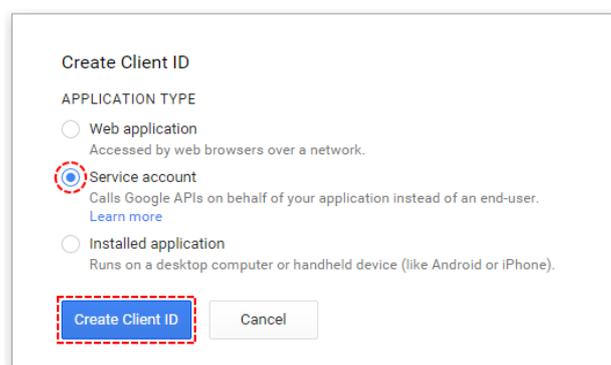
Picture 4.11 Google authentication step 4

5. Now in **APIs & auth** and in **Credentials** please click on **Create new Client ID** button

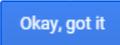


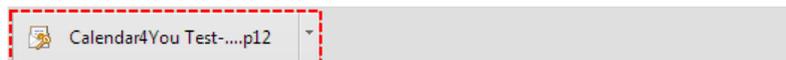
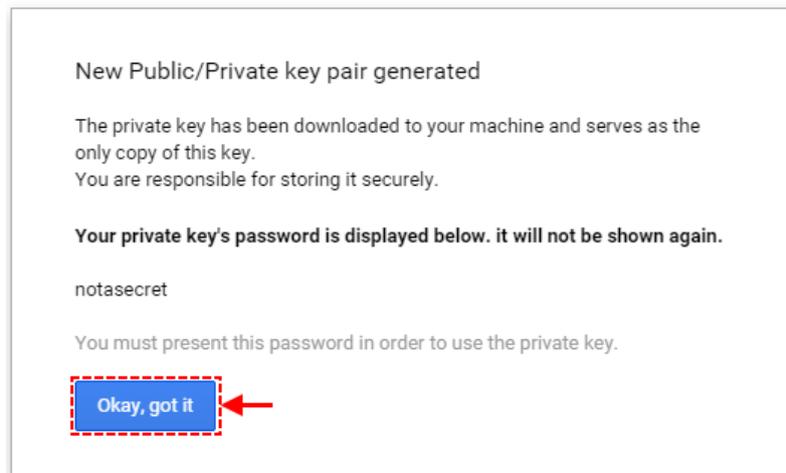
Picture 4.12 Google authentication step 5

6. Choose **Service account** and click on **Create Client ID** button

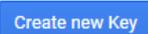


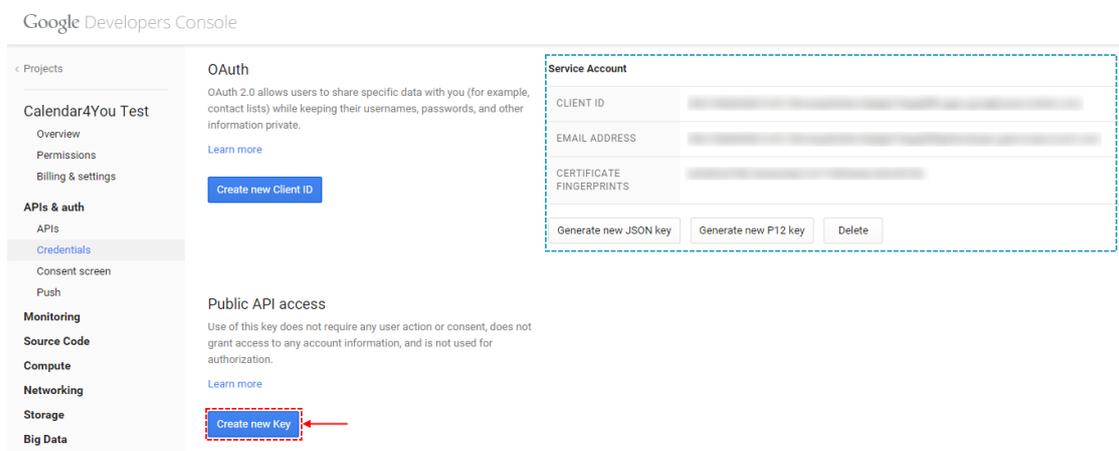
Picture 4.13 Google authentication step 6

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



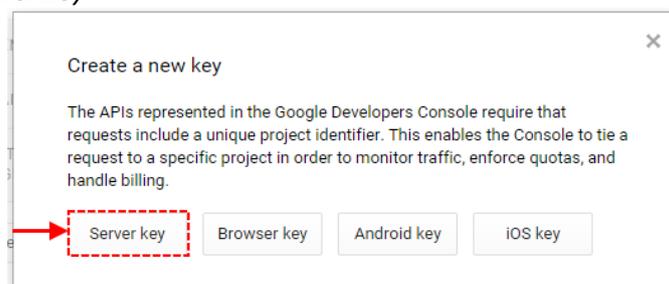
Picture 4.14 Google authentication step 7

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



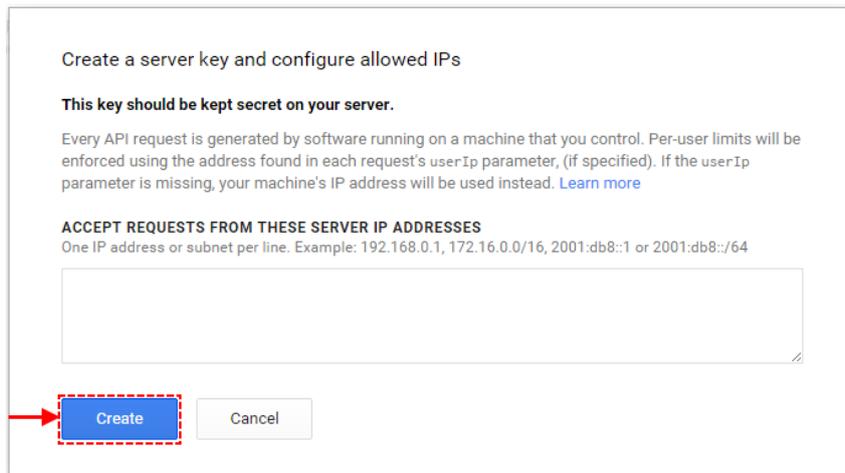
Picture 4.15 Google authentication step 8

9. Please choose *Server key*



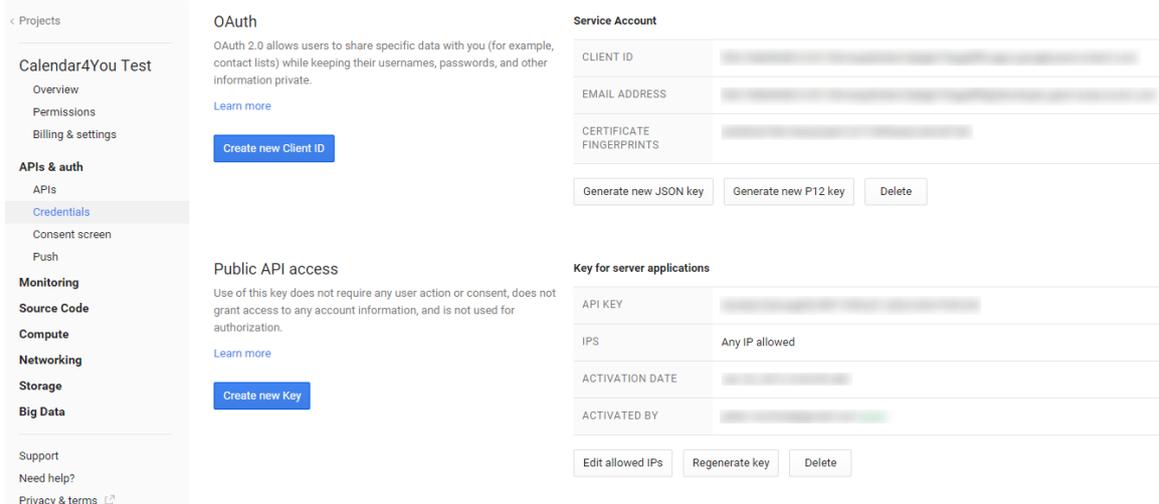
Picture 4.16 Google authentication step 9

10. Click on  button



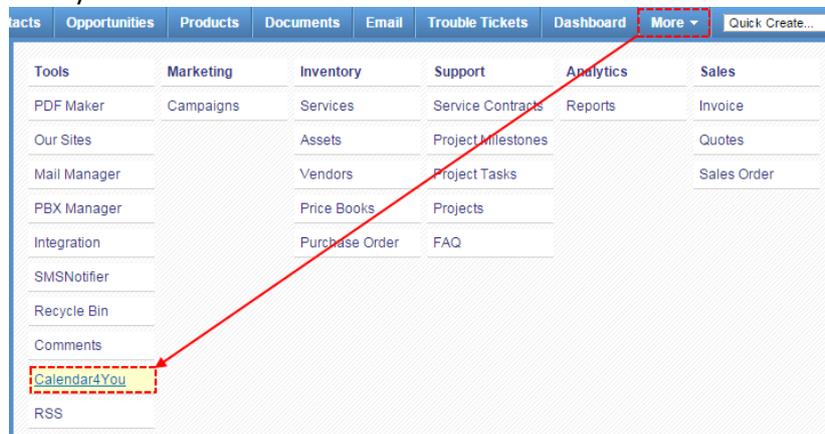
Picture 4.17 Google authentication step 10

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



Picture 4.18 Google authentication step 11

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



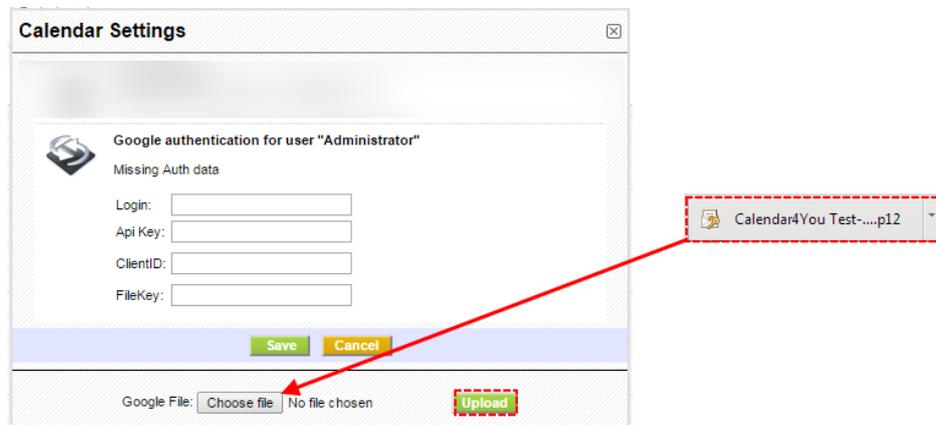
Picture 4.19 Google authentication step 12

13. Click on  button



Picture 4.20 Google authentication step 13

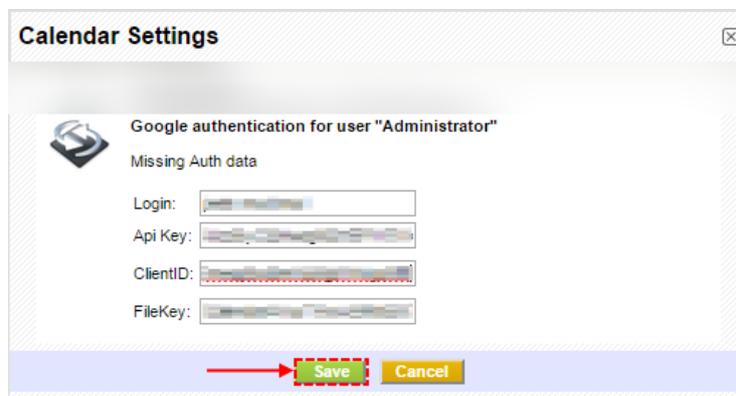
14. First upload downloaded file from step 7



Picture 4.21 Google authentication step 14

15. Now, click on  button again, fill required data and click on **Save** button

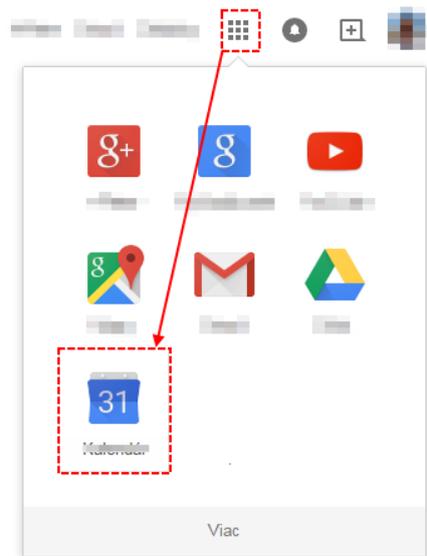
- a. **Login** – login into Google account
- b. **Api Key** – API KEY from **Key for server applications** from step 11
- c. **ClientID** – ClientID from **Service Account** from step 8 without “.apps.googleusercontent.com”
- d. **FileKe** – name of downloaded file that you upload in step 14 without “.p12”



Picture 4.22 Google authentication step 15

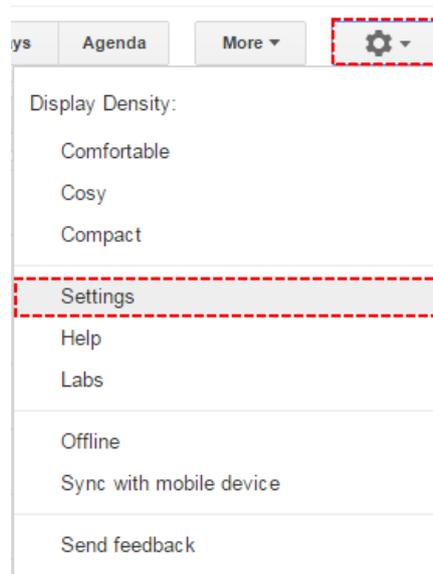
**Note:** In case of trouble with error message: Error refreshing the OAuth2 token, message: '{"error": "invalid\_grant"}', please go to the page: <https://wiki.debian.org/NTP> and install it on your server.

16. Go to your Google account and choose Calendar



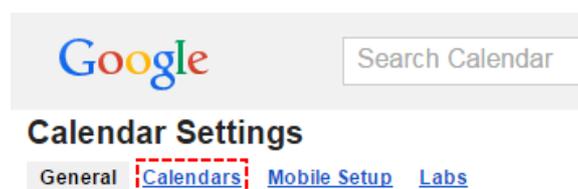
Picture 4.23 Google authentication step 16

17. Click on  button and choose **Settings**



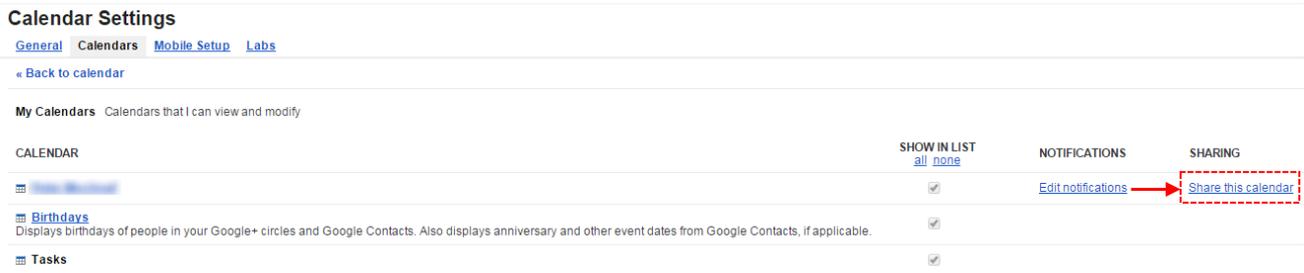
Picture 4.24 Google authentication step 17

18. Choose **Calendars**



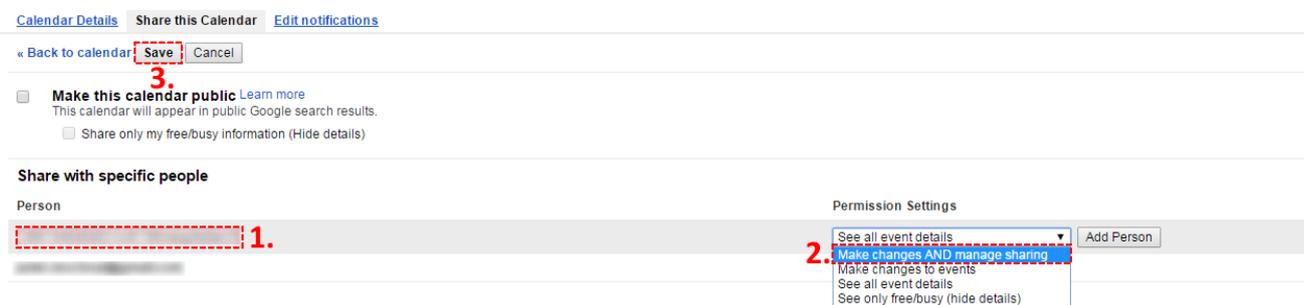
Picture 4.25 Google authentication step 18

19. Click on [Share this calendar](#)



Picture 4.26 Google authentication step 19

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.



Picture 4.27 Google authentication step 20

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

## 4.3 Module manager settings

The Calendar 4You settings can be initiated using button  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



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.

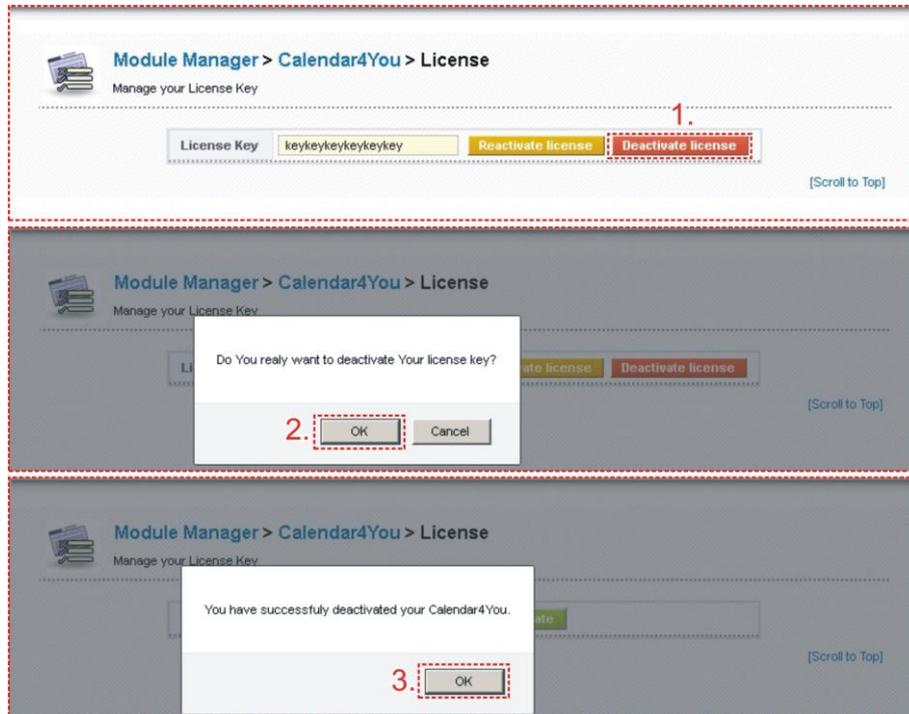


Picture 4.29 Manage profiles

### 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 .



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:

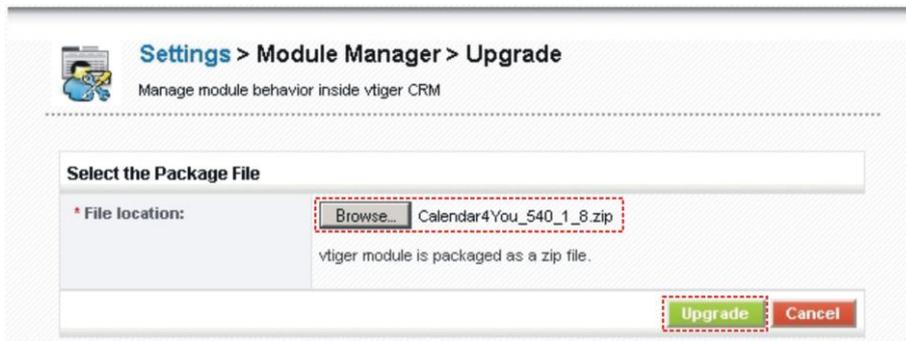
1. Insert the license key and click on button **Activate** if you are activating license after previous deactivation.
2. Activation continues with validations steps well known from installation process; please refer to chapter 1, Picture 1.5, Picture 1.6.



Picture 4.31 License activation

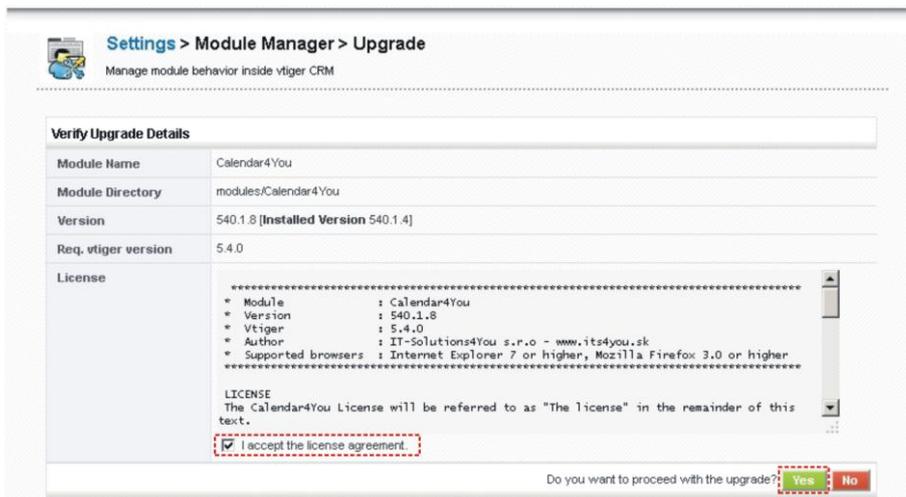
### 4.3.3 Upgrade

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



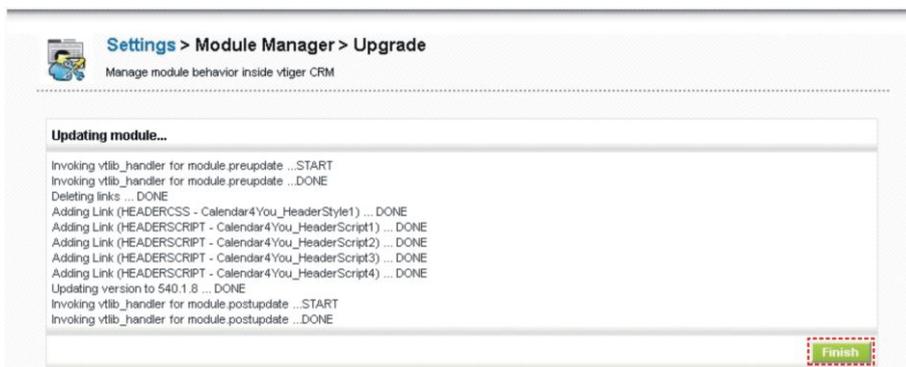
Picture 4.32 Upgrade of the Calendar 4You – step 1

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.



Picture 4.33 Upgrade of Calendar 4You – step 2

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



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.

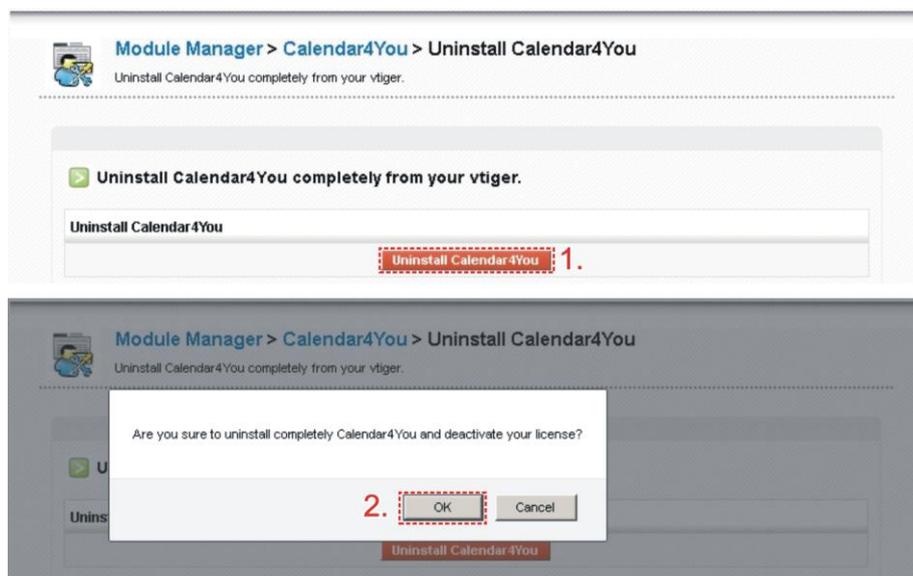


Picture 4.35 Upgrade failure

#### 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 **OK** in dialog box.



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 [https://wiki.vtiger.com/index.php/Sharing\\_Access](https://wiki.vtiger.com/index.php/Sharing_Access) for more details how to define sharing access.

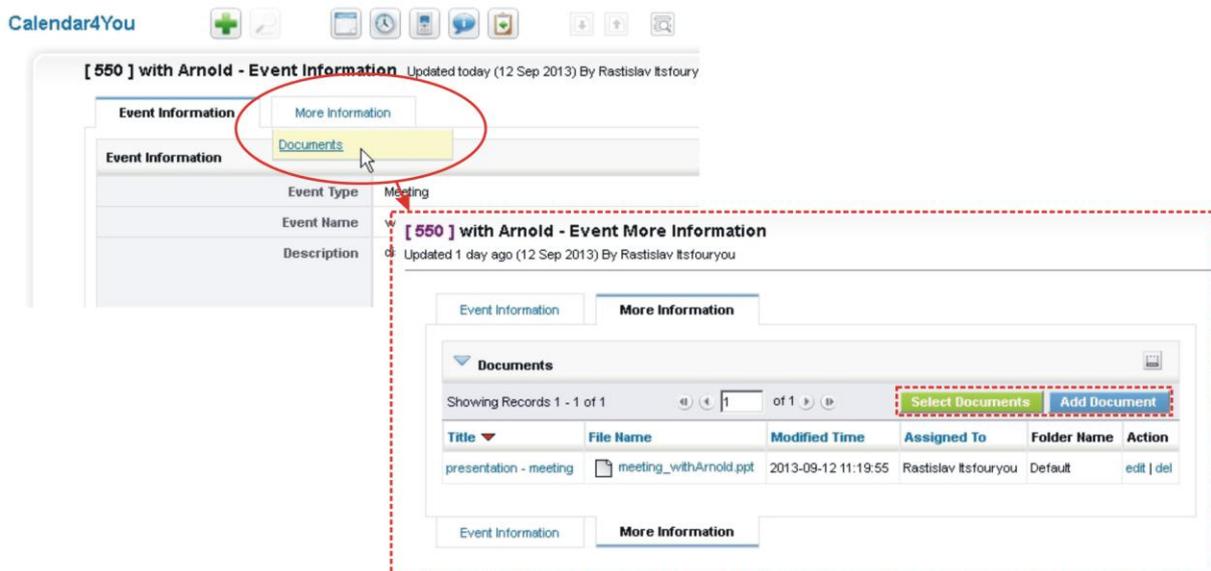


Picture 4.37 Calendar 4You sharing access

## 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 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**.



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.

The image is a composite screenshot of the vtiger CRM interface, divided into four numbered sections illustrating the synchronization process:

- Section 1:** The **Settings > Picklist Editor** window. The **Select Module** is set to **Events** and the **Select picklist** is **Activity Type**. Under **Picklists Available in Events For**, the role is **CEO**. In the **Activity Type** list, **Google events** is highlighted with a red circle and a red arrow labeled '1'.
- Section 2:** The **"Google events" Settings** window, specifically the **Google Sync** tab. The **Synchronize with calendar** dropdown is set to **ITS4You meetings**. Both **Export "Google events" to calendar** and **Import from calendar to "Google events"** are checked. A red arrow labeled '3' points to the **ITS4You meetings** dropdown.
- Section 3:** The **Activity List** window. The **Google events** activity type is checked and highlighted with a red circle. A red arrow labeled '2' points from this section to the **ITS4You meetings** calendar in Section 2. The **Assigned To** field is set to **Rastislav Itsfouryou**. The **Event status** has **Planned**, **Held**, and **Not Held** checked.
- Section 4:** The **Calendar** window showing a view for **Mon 9/9** and **Tue 9/10**. It displays several events: a red event (8:15 - 10:15) with details like **Contact Name: with Arnold**, a green event (10:30 - 11:30) titled **Meet regarding vtiger order.**, and another green event (8:30 - 9:30) titled **Call Mark - invoice handling**. A blue arrow labeled '4' points from the green events in the calendar to the **Google events** activity type in the Activity List.

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**