

5.3 Calendar

Bright Pattern Documentation

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Calendar Tutorials

These tutorials provide step-by-step instructions for everything related calendars:

- [How to Edit Existing Events](#)
- [How to Open the Calendar](#)
- [How to Schedule an Event](#)

How to Edit Existing Events

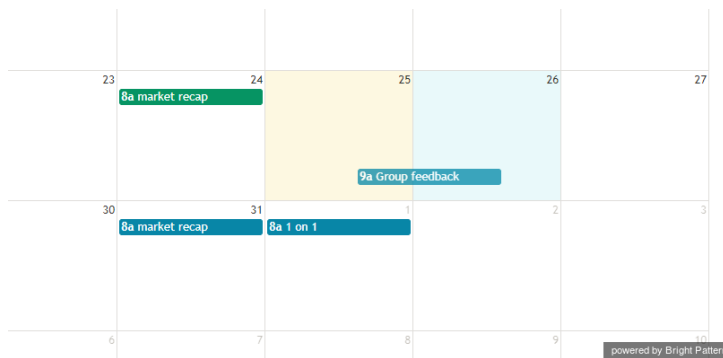
You can use the following methods to edit existing events.

Edit Properties

To edit any event property, including its title, click the event on the calendar. Its current properties will be displayed in the panel on the right. Click **Edit** and be sure to save your changes when you are done.

Reschedule

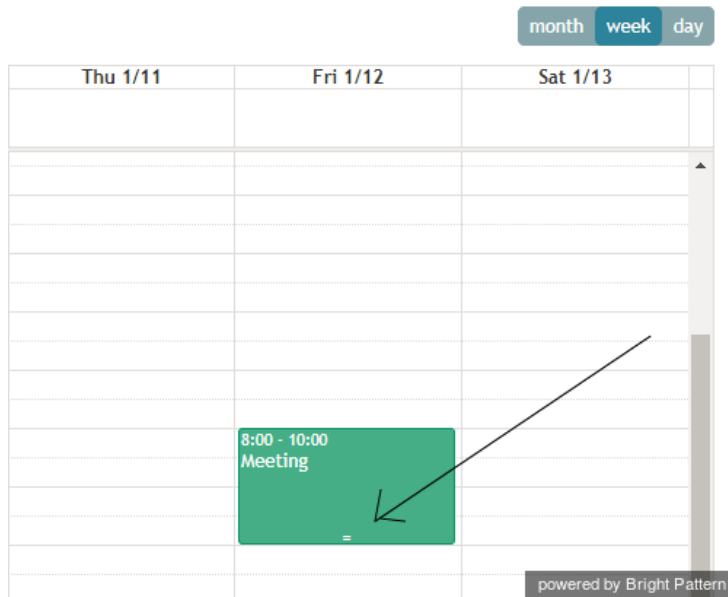
To reschedule an existing event, click and drag it to the new desired time slot directly in the calendar grid.



How to reschedule an event

Change Duration

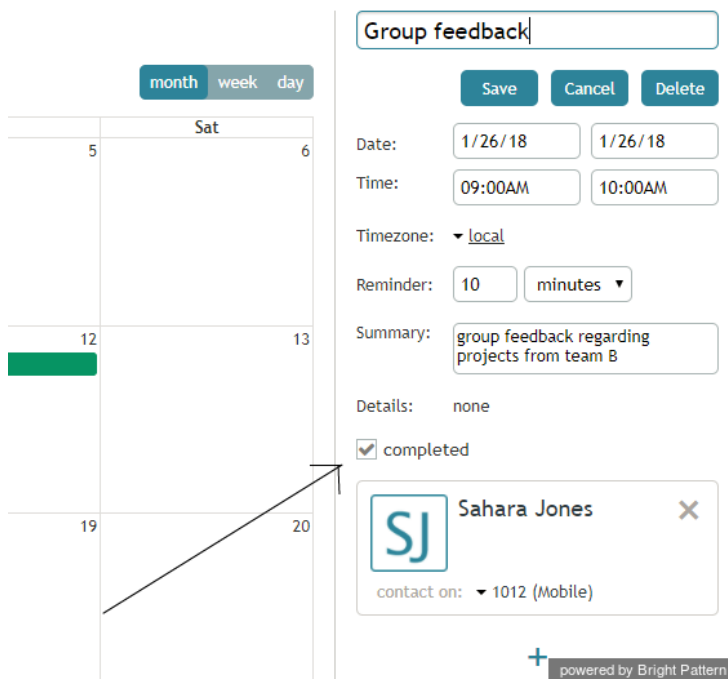
When using the calendar in *Week* or *Day* view, you can change the duration of an event by clicking and dragging the = symbol at the bottom of the event up or down. This action expands or reduces the amount of time that the event will take.



How to change event duration

Mark As Completed

To mark your event as completed, click the event and go to the event properties on the right-hand side of the screen. Then select the **completed** checkbox. When you are done with this event or assignment, click **Save**. Completed events will be shown on the calendar in a green color.



Check the completed box

Delete

To delete an event, click the **Delete** button.

1 on 1

[Edit](#) [Delete](#)

Date: Feb 1, Thu

Time: 08:00AM - 09:00AM
Remind 10 minutes before

Summary: meeting time

Details: none


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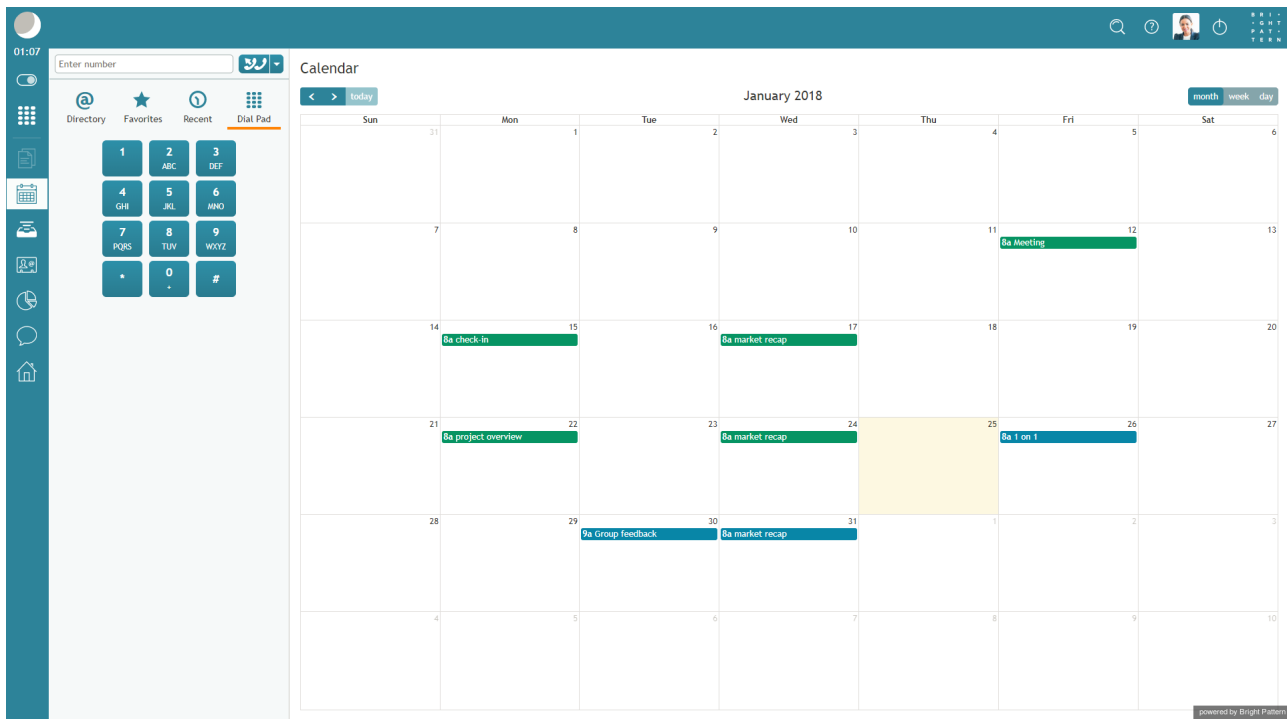
How to delete an event

Note that your supervisors can view and edit your personal calendars, reassign your scheduled tasks and events to other agents, and assign someone else's tasks to you.

How to Open the Calendar

Your Agent Desktop is equipped with a calendar where you can schedule various tasks and events related to your work, such as follow-up calls with customers. You can configure your calendar to provide reminders for such scheduled events.

To open the calendar, click the **Calendar**  icon in the main menu on the left-hand side of the screen. The calendar view will open in the *Context Information Area*. You can use the standard controls above the calendar grid to switch between the **day**, **week**, and **month** views, to move to other dates in the past (<) or in the future (>), and to return to the view containing the current date (**today**). The current date is highlighted with a light yellow background.



Calendar

How to Schedule an Event

You can use the calendar to schedule events.

Step 1: Designate the date and time

Click anywhere on the calendar or select the desired time slot. A panel on the right will display event properties to edit.

Date:

Time:

Timezone:

Reminder:

Summary:

Details: none

completed

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Event properties

Step 2: Name the event

Enter a title for your event. The title will be displayed on the calendar.

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Event title

Step 3: Confirm the event details

The time of the event will correspond to the position and duration of the time slot selected in the calendar grid. You can adjust this time manually in the *Date* and *Time* fields. Then adjust the *Timezone* if necessary.

Date:

Time:

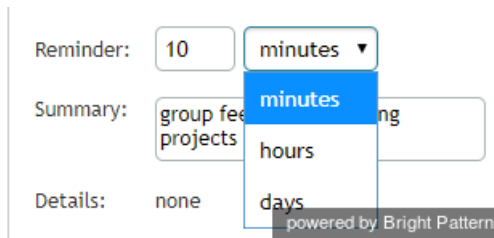
Timezone:

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Adjust date, time, and timezone

Step 4: Set a reminder

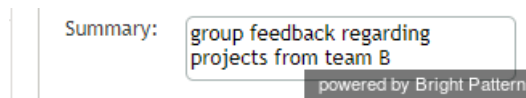
Specify how far in advance you would like to be reminded about the event. You can tell the calendar when to pop a reminder to you, in terms of the number of minutes, hours, and days in advance of the event.



Reminder

Step 5: Describe the event

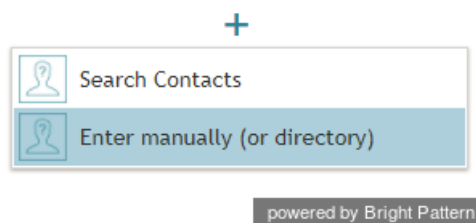
In the *Summary* field, you can optionally add a descriptive summary of the event.



Summary

Step 6: Assign contacts

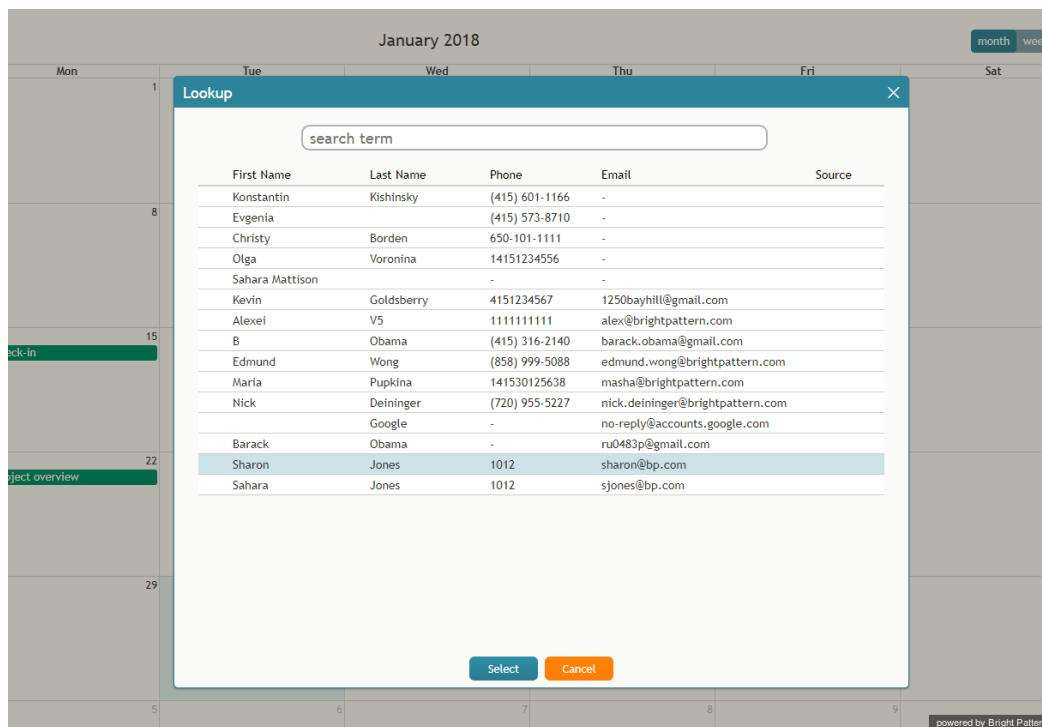
If your event is a scheduled call to a known contact, you can specify the contact's name, phone number, and/or email address. To add or assign contacts to an event, click the + sign at the bottom of the event properties pane. You will have two options for looking up the contact.



There are two ways to add a contact

Quick Contact Lookup

Click **Search contacts** to find a contact in the *Lookup* window that pops up.



Contact Lookup

To use Lookup, type any text into the **search term** field. Lookup will search through the list of the most recent manual name-address inputs first (the list maintained throughout the system, not just in calendar), and then it will search in directory. It searches for the text that was entered, in both the name and address fields of your system's data. The matches are highlighted in the search results list in bold.

Enter Contact Details Manually

Click **Enter manually (or directory)** to type in a name on an empty contacts card. Clicking **create contact** will create a new contact record for this person.

✕

contact on:

create contact ▼ Business



Manual entry

When filling in an empty card, typing into the text field will displays a drop-down list of 10 entries pulled from recent address entries (i.e., entries from manual input, contacts, or the directory maintained in the system, not just in the calendar). If fewer than 10 entries are found, the rest are pulled from the directory.

If there are multiple addresses for a person, each name-address pair is shown as a separate item

Step 7: Save your event (the most important step)

Click the **Save** button. The new event will appear in the calendar highlighted in a blue color.

You may also use the calendar to schedule follow-up activities in the context of your present customer interactions directly from the **Contact Info Panel**. For more information, see section [How to Schedule a Follow-up Activity](#).