Calendar Sharing

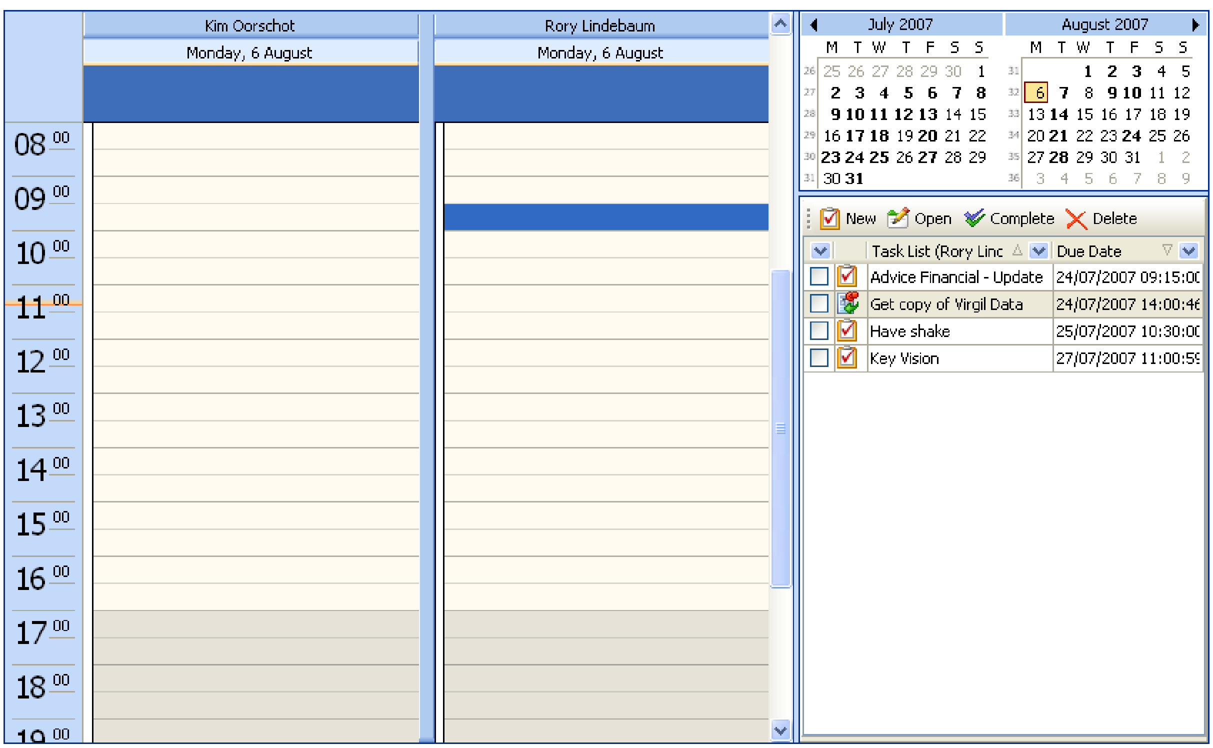
The mult -user vers ons of Fort CRM enable calendar shar ng bet een selected users. Calendar shar ng allo s your PA to manage your d ary, and enables colleagues to organ se meet ngs that don't confl ct   th your schedule. It also allo s you to lan meet ngs, make a   o ntments or ass gn tasks to other users.

Users can v e   each others calendars, and add or ed t a   o ntments and tasks, rov ded they have the author ty to do so. Th s de ends on ho   the erm ss ons are conf gured. By default you are not able to v e   others calendars—the system adm n strator must set a erm ss on for you. Even f you are erm tted to v e   another user's calendar, you may not have erm ss on to add or ed t a   o ntments.

To view another users calendar:

- Cl ck on the Resources button n the Calendar toolbar.
- Choose Add Resource.
- Select the account manager   hose calendar you   sh to v e , e ther by double cl ck ng on the r name or by h ghl ght ng the r name and cl ck ng the Select button at the bottom of the screen.

The d ary for the selected account manager   ll a   ear bes de your o n. Cl ck ng on the d ary v e   for the other account manager   ll d s lay the r task l st.



Viewing several calendars at the same time

You can v e   more calendars by re eat ng the above   rocedure for v e   ng another calendar. The d ary v e   of each account manager   ll reduce n s e to accommodate the ne ly added account manager's d ary.

Scheduling meetings for other users

A meet ng can be added to the d ary for all selected account managers by cl ck ng on the Meet ng button n the Calendar toolbar and enter ng the deta ls of the meet ng. See A   o ntments for more deta ls on sett ng u   ne   a   o ntments. The meet ng   ll be scheduled n the d ary of all account managers you are currently v e   ng.

Creating tasks for other users

A task can be added to the task l st of the currently selected account manager by cl ck ng on the Ne   button at the to   of the task l st. See Tasks for more deta ls on add ng tasks to the task l st.

To remove other calendars:

- Select the calendar to be removed by cl ck ng any   here n the d ary v e   or task l st for that account manager.
- Choose Remove Resource. The calendar for the account manager   ll no longer be v s ble.

To view another account managers calendar in place of your own:

- Cl ck on the Resources button n the Calendar toolbar.
- Choose Change Resource.
- Select the account manager   hose calendar you   sh to v e , e ther by double cl ck ng on the r name or by h ghl ght ng the r name and cl ck ng the Select button at the bottom of the screen.

The calendar for the selected account manager   ll a   ear n   lace of your o   n. To return to your o   n calendar, cl ck the Resources button, choose Change Resource and select yourself as the account manager.