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Calendar Quick Guide

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PracticeMaster Calendar Quick Guide

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Quick Guide to the PracticeMaster Calendar

The Calendar allows you to keep track of your meetings, appointments, and tasks. This guide will provide you with all the information you need to enter calendar records and use the PracticeMaster Calendar.

Getting Started

To begin, open PracticeMaster. In the Quick Launch, search for and select "Daily Calendar."

The calendar window has three sections. The primary section is the Event Calendar, which displays a detailed view of the day/week/month. The Date Selector on the right allows you to select the date to view, and the Task List on the bottom shows a sortable list of tasks.

You will notice that the events and tasks are displayed in separate locations in the calendar. While both events and tasks are considered calendar records, there are some notable differences between the two.
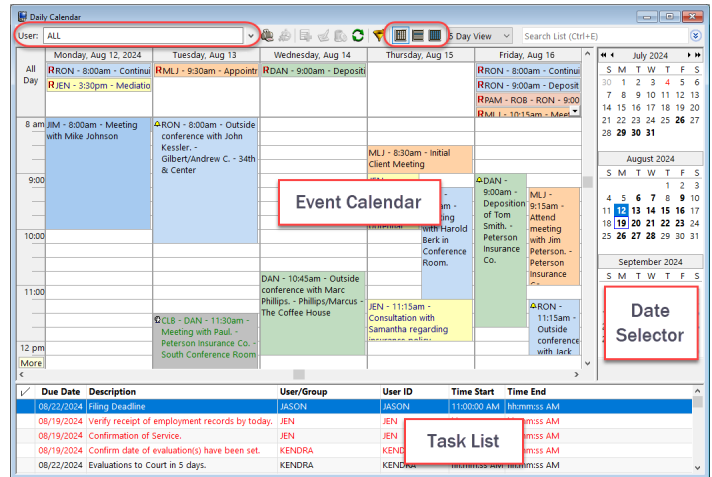
- An event is a calendar record that has both a start and an end time, such as a meeting. Events are viewable in the Event Calendar.

- A task is a calendar record that may or may not have a start time and may or may not be associated with a date, such as preparing a contract or confirming receipt of a document. Tasks are viewable in the Task List and are optionally viewable in the Event Calendar.

Creating a New Calendar Record

There are several methods that can be used to create a new calendar record, but the easiest method is shown in the figure on the right. The following procedure will instruct you how to quickly add an event or task.

1. From the Event Calendar, click in the time slot where you want the event or task to begin, and drag your mouse to the end time.

2. Right-click in the selected region, and choose **Add New Event** or **Add New Task**, as shown in the figure on the right.

3. A new, blank calendar entry will open; fill in the appropriate information.

4. Save the entry by clicking the button or pressing Ctrl + S.

Much of the information for the calendar record is already populated for you in the new calendar entry window, as shown on the right. You can save the record without typing anything; however, it is recommended that you type a **Description** and verify the **Time**, **Date**, and **User/Group** fields.
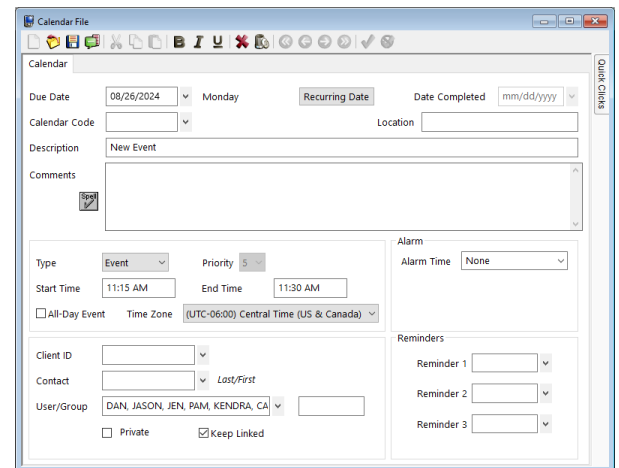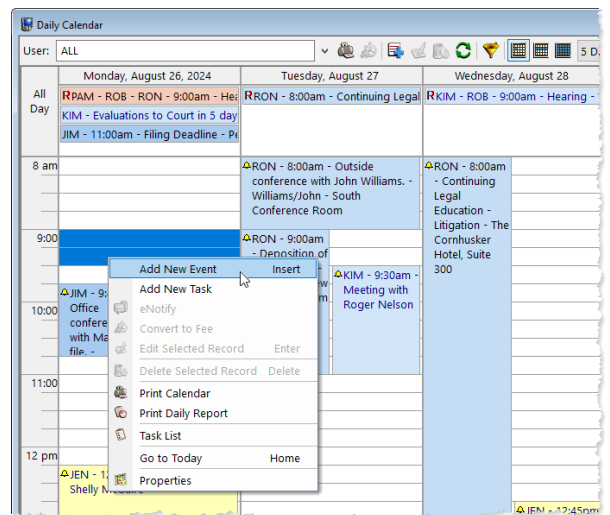
Calendar Entry Information

We have just described the most-commonly used method for calendar entry in PracticeMaster. The following section will explore other aspects of calendar entry so you can become better acquainted with the fields and available features. The numbers on the list correspond to the labels in the figure.


1. **Due Date** – This field defaults to the selected date in the calendar view.

2. **Recurring Date** – This button takes you to the Recurring Dates window where you can select any other dates on which an event will occur, such as scheduling weekly meetings.

3. **Date Completed** – This field is only used for tasks. It indicates when and if a task has been completed.

4. **Calendar Code** – This field is used to categorize and provide a default description in the Description field. Each calendar code can be configured with different text colors, and can be saved as either an event or task.

5. **Location** – This field is used to describe the location of an event or task.

6. **Description** – This field contains a default value based on the Calendar Code, but it can also be changed. It is used to describe an event or task.

7. **Comments** – This field is used to include additional information for a calendar record. Spell check and rich text formatting are available for this field.

8. **Type** – This field indicates whether a calendar record is an event or task.

9. **Priority** – This field is used to assign a numeric value, zero to nine, to a task. Zero is the highest priority possible.

10. **Start Time** – This field is used to specify the start time of an event or task. It defaults to the earliest time selected when a new entry is created.

11. **End Time** – This field is used to specify the end time of an event. It defaults to the latest time selected when the event is created.

12. **Add-Day Event** – When an event spans an entire day, you can select this check box rather than specify a start and end time.

13. **Time Zone** – Events or Tasks with a Start Time can have a time zone specified during creation for proper scheduling. Records are shown for users based on their selected time zone. For example, scheduling a conference call for a client in New York at 10:00 A.M. Eastern Time will display on a user's calendar in Chicago at 9:00 A.M. Central Time.

14. **Alarm Active** – This field indicates if there will be an alarm set for a calendar record. An alarm is a pop-up that reminds you of an event or task.

15. **Notify** – This field determines the number of minutes before the start time that an alarm will pop up.

16. **Client ID** – This field is used to specify the client, if any, that is associated with the calendar record. This is useful for reporting purposes as well as for converting calendar records to fees for billing in Tabs3 Billing.

17. **Contact** – This field specifies the contact, if any, that is associated with the calendar record.

18. **User/Group** – This field specifies the user(s) and/or group(s) that are associated with the calendar record. It defaults to the user(s) and groups whose calendar you were viewing when you created the new calendar record. For example, if you were viewing your calendar, the new calendar record would default to your User ID. At least one user or group must be specified.

19. **Private** – This check box is used to specify whether a calendar record is private or public. When a record is marked as private, everyone can see that you have time blocked out, but only certain people can see the details.

20. **Keep Linked** – When multiple users are selected, this check box is used to determine if new calendar records are part of a series of linked calendar records.

21. **Reminders** – Information in this field will create reminders for the event or task in the Daily Report and the daily/weekly/monthly calendar.

Using the Calendar

There are many useful features available to you in the PracticeMaster calendar. The calendar is powerful in its flexibility, ease of use, and speed. It is easy to edit calendar records, view other user's calendars, schedule meetings, and resolve scheduling conflicts.

Calendar Views

There are several different views available for the calendar. You can view calendar records from a list in the Calendar file or from the daily, weekly, or monthly views. It is easy to switch between views so you can choose to see only the information you need to see.
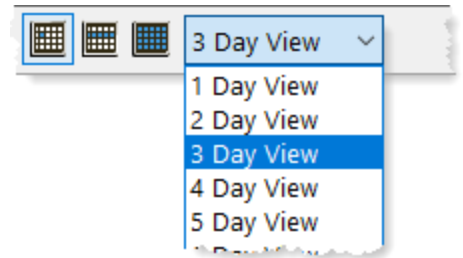

In the toolbar figure on the right, the first icon, which is highlighted, indicates that the daily view is being shown. The icons to the right represent the weekly and monthly views, from left to right respectively. You can switch between these by simply clicking each icon.

In addition, you can customize the presentation of the daily and weekly views. The drop-down menu, shown above, is used to customize how many days or weeks you would like to view in the calendar.

Viewing Multiple Users' Calendars

It is often advantageous to view the calendars for multiple users or groups simultaneously. This gives you a visual of when people are available for meetings or events. To view the calendars for multiple users, open the calendar. In the upper left corner of the window, you will see the **User** field, as indicated in the figure on the right. This defines the users and groups whose calendars are being viewed. The list of users and groups is separated by commas.
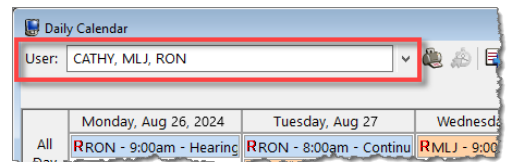
To add or remove a user or group from the calendar view, use the button to the right of the **User** field. This will open the Multiple User/Group Lookup window, also shown to the right. To include a user or group, click that user's name (in the far left column) so that a check mark appears. To include all users, select the **All Users** check box. To remove a user or group, click the check mark to clear it. Alternatively, you can manually type in or delete a name from the **User** field directly in the calendar.
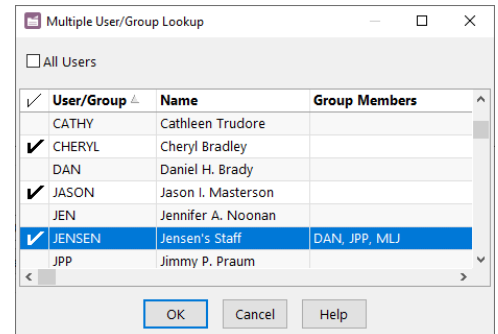

Scheduling for multiple users

The easiest way to schedule a meeting for multiple users is to view a daily calendar for all of the desired users. Doing so will automatically identify any scheduling conflicts and allow you to see the available times.
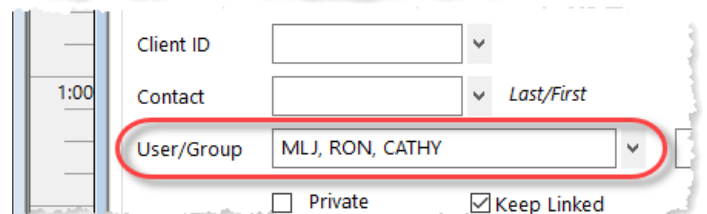
When creating a new calendar record from the calendar, the users or groups associated with the new record automatically default to the users or groups whose calendars are being viewed, as shown in the figure on the right. If you want to add or remove a user or group from a record, it can be done using the button next to the **User/Group** field.
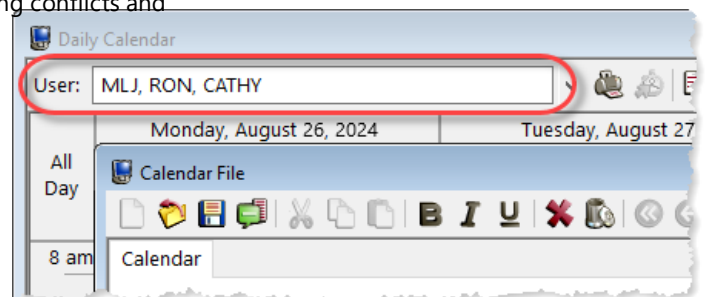
Linked Records

When saving calendar records for multiple users, the records will automatically be linked. Allowing records to be linked for multiple users means that if an edit is made to one record, say a change in the start time, then all of the linked records will automatically be adjusted as well.

Handling Calendar Conflicts

Scheduling conflicts are not uncommon, especially when creating records for multiple users or groups.

Conflicts from Creating a New Record

When you create a new calendar record, PracticeMaster will alert you of any conflicts before saving the record, thus providing you an opportunity to eliminate the conflicts. When there are conflicts, a Calendar Conflict window, similar to that on the right, will be displayed when saving the entry. It gives you the option of accepting the record in spite of the conflicts, or editing any highlighted record in order to avoid the conflict. Creating a new record by first viewing calendars for the required users and groups is an easy way to see the available times and to avoid scheduling conflicts.
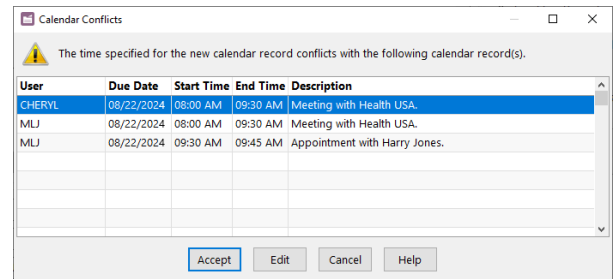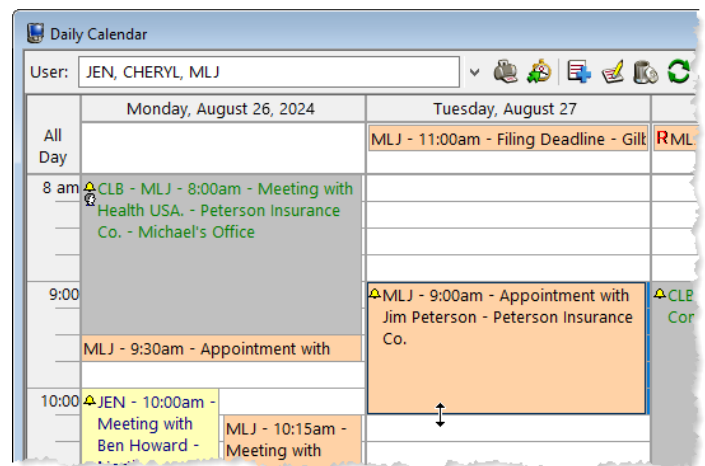
Editing Calendar Records

Often, you may need to change a meeting time, a meeting date, or those invited to a meeting. This means you will need to edit a calendar record. There are a couple ways to accomplish this.

Edit Record Start Time, End Time, or Date

You can edit the date, start time, or end time for a calendar record by dragging and dropping it (provided Drag and Drop has not been disabled in the Calendar Properties). To edit the start or end time in the Daily Calendar, position the pointer over the top or bottom edge of a record until the cursor changes to a two-way arrow. Then, click and drag to set the new start or end time. If you want to edit the date, you can drag and drop the calendar record onto a different day by positioning the cursor over the left edge of the entry until the cursor become a four-way arrow, and then clicking and dragging it onto a different day. The figure on the right shows the meeting on Tuesday at 9:00 a.m. being extended to end at 10:15 a.m., rather than 10:00 a.m.

Edit Other Record Information

If you want to add additional users or groups, or change a description, client, or other information, you must open the calendar record in the calendar entry window. You can do this by selecting the record and pressing Enter, double-clicking the record, or right-clicking and choosing Edit Selected Record. After making your edits, click or press Ctrl + S to save the record and close it.

Conflicts from Editing a Record

As previously explained, there are two ways you can edit a calendar record. You can drag and drop it to change the date, time, or duration; or you can open the record and change the information manually. When you open the record to change information manually, the calendar will check for conflicts. However, when you drag and drop the record, the calendar does not check for conflicts.

Convert Calendar Records to Fees

After you have completed tasks or events on your calendar, you may want to bill for that time by converting your calendar records to fees.
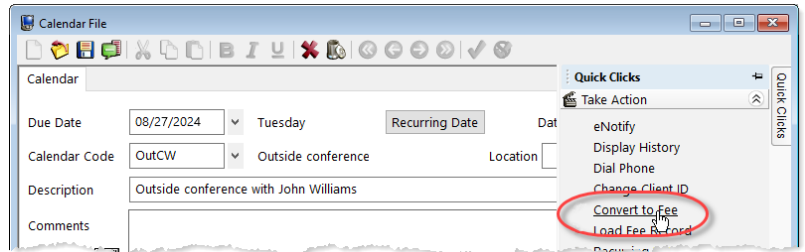
Open Calendar Record

From the daily, monthly, or weekly calendar views, select and open a calendar record. Any of the following methods will accomplish this.

- Double-click a calendar entry in the Event Calendar or Task List.
- Select the entry in the Event Calendar or Task List and press Enter.
- Right-click an entry in the Event Calendar or Task List and choose **Edit Selected Record**.

Choose "Convert to Fee"

When the record is open, click the ⊗ icon to expand the **Take Action** group of the Quick Clicks pane. Choose **Convert To Fee**, as shown in the figure above.

Confirm the Fee Information

A Fee window will be displayed and filled in based on the information in the calendar record. If there is not a **Client ID** associated with the calendar record, you will be prompted to choose a client. After verifying the information, press Ctrl + S to save the fee. Keep in mind that you will want to leave the Rate and Amount fields set at 0.00 when saving the fee entry, thus allowing the default Rate to be retrieved from Tabs3 Billing and the Amount to be automatically calculated. Once you have billed for a calendar record, PracticeMaster will not allow you to re-bill for the same record.

Calendar Properties

There are many different properties in the calendar that you can change. These properties allow you to customize the look and feel of the calendar to fit your specific tastes. To access the calendar properties, in the Quick Launch, search for and select "Calendar Properties."

As you can see in the figure on the right, there are different tabs in the Calendar Properties for the different customization categories. The **General** tab will let you change the event colors, choose the holidays that are shown, and select how long to wait for the calendar to refresh, among other options.

The **Daily**, **Weekly**, and **Monthly** tabs allow you to change the duration of the work day, the time scale intervals (only on the **Daily** tab), and the font used.

The **Task List** tab lets you choose what types of tasks are viewable, the type of column layout, and how the tasks are sorted.

The **Time Zone** tab lets you choose what time zone records will be shown in on the graphical calendar, as well as the default time zone for new calendar records.
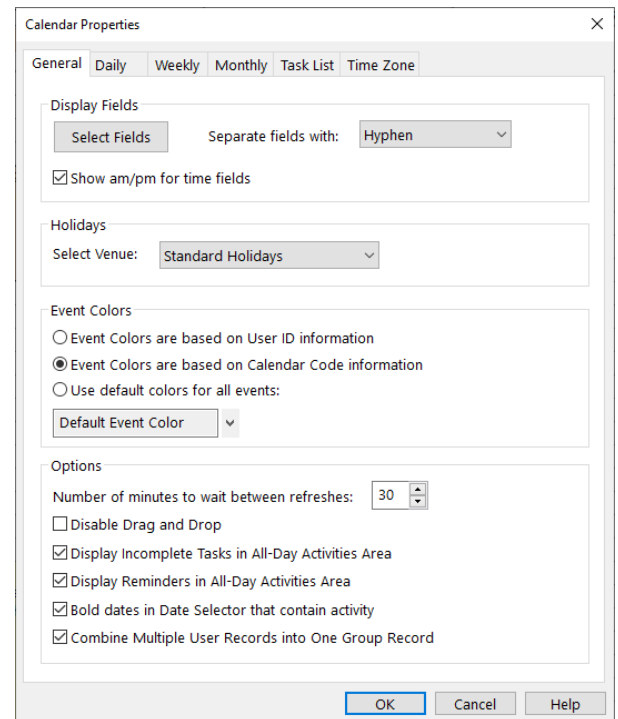
Alternate Methods for Creating a Calendar Record

From the calendar, there are several additional methods for creating new calendar records other than the method of highlighting a block of time and right-clicking to add a new record. These methods are listed below.

- Double-click the area in the Event Calendar where you want to add the new calendar record.
- Highlight the area in the Event Calendar where you want the appointment and press the Insert key.
- Highlight the area in the Event Calendar and click the 📇 button; the **Start Time** and **End Time** will automatically be filled in.
- Simply click the 📇 button, as shown in the figure on the right.
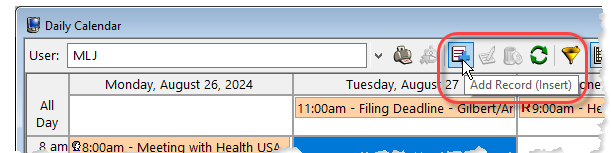
Calendar Entry Window Options

If the calendar window seems too daunting, is lacking some fields, or contains unwanted fields, then you can customize the window and choose which fields are displayed. Customizing the calendar entry window can help streamline the calendar entry process. The figures below show the default calendar entry window on the right and an example of a customized window on the left. Keep in mind that any customization applies to all users.

If you find that there are fields in the default calendar entry window that you do not use, the Form Designer can be used to quickly eliminate those extra fields.

Advanced Field Information

Now that you have a basic understanding of the uses for the fields, you may want some more advanced information. The following sections provide advanced field information for tasks and events.

Fields Common to Both Events and Tasks

Many fields are common to both events and tasks. The letters in the list correspond to the labels in the figure.

A. **Due Date** – This is the date on which the event or task will take place. Pressing "D" will enter the system date and using the "<" and ">" keyboard keys will decrease or increase the date by one day. The corresponding day of the week appears next to the field once it is set. An event requires a Due Date; a task does not.

B. **Recurring Date** – This button opens the Recurring Dates window, which allows you to easily create a recurring calendar record.

C. **Calendar Code** – This field is used to categorize calendar records. The calendar codes can have text and background colors associated with them that will distinguish them in the calendar view. This is convenient when you are browsing your calendar. To set the calendar code, you can type in the abbreviation (such as CM for Client Meeting as shown in the figure) or use the button to open the Calendar Code Lookup window.

D. **Location** – This field is used to describe the location of an event or task, such as a court room, conference room, restaurant, city, or other venue.
Note: The **Location** field can be copied from the alarm window, making it a useful field to store URLs for online meetings.

E. **Description** – This field briefly describes the event or task, and defaults based on the Calendar Code. It is typically displayed on the calendar as well as alarm pop-ups.

F. **Comments** – This field is used to include detailed information for a calendar record. Spell check, rich text formatting, and text searching are available in this field.

G. **Start Time** – This field is used to describe the time when an event or task will begin. It is not required for a task to have a Start Time, but an event must have a Start Time. To modify this field's value, type in the desired time or press "T" for the system time.

H. **Time Zone** – The time zone selector is available for events, as well as Tasks with a Start Time specified.

I. **Alarm** – This area is used to set an alarm for the event. If Alarm Active is set to Yes, then an alarm will pop up the specified number of minutes before the start time. Default alarm information can be defined for each Calendar Code.

J. **Client ID** – This field indicates the client, if any, that is associated with the event or task. This field allows you to track all client related events and tasks. The client's name and work description are displayed next to the field. To choose a client, type in the Client ID, the client's name, or use the ⯆ button to open the Client Lookup window.

K. **Contact** – This field indicates the contact, if any, that is associated with the event or task. You can choose the contact by typing in the name or using the ⯆ button to open the Contact Lookup window.

L. **User/Group** – This field indicates the user(s) and/or group(s) associated with the record. It defaults based on the user/group calendars being viewed when the record was created. You can change the user/group by typing in the name(s) or using the ⯆ button to open the Multiple User/Group Lookup window. Many firms will define various resources as users for scheduling purposes, such as meeting rooms, projectors, or laptops.

M. **Private** – This check box is used if you want the event or task to be marked as private. Using System Configuration, each user has the ability to restrict who has access to his or her private calendar records.

N. **Keep Linked** – This check box keeps calendar records linked. To remove a user from an existing series of linked records, clear this check box; all other users will remain linked. Changes to other users' records will not affect the removed user.

O. **Reminders** – This section creates reminders for the event in the Daily Report and the calendar. Reminders appear as calendar records with an **R** symbol.

Field Information for Events

There are some fields in the calendar entry window that are specific to events and are only enabled when adding a new event. This section provides further details on these fields.

P. **Type** – This field defaults to the Type specified for the Calendar Code. When this field is set to "Event", it requires a **Start Time** and **End Time**, and will be shown on the Event Calendar.

Q. **End Time** – This field represents the End Time for the event. An event is required to have an **End Time** value. If the new event is created through the Daily Calendar, it will be filled in based on the selected **End Time** in the Event Calendar. Otherwise, it will default to 30 minutes past the **Start Time**. To change the **End Time**, type in the desired time or press "T" for the system time.

R. **All-Day Event** – This check box represents an event that does not have a start or end time but take sup the entire day. Select the **All-Day Event** check box to set the **Start Time** to 12:00 A.M., the **End Time** to 11:59 P.M. and disable the **Time Zone** field.

Field Information for Tasks

There are some fields in the calendar entry window that are specific to tasks and are only enabled when adding a new task. This section provides further details on these fields.

S. **Date Completed** – This field is used for determining if a task has been completed. Pressing "D" will enter the system date. The button will open a Calendar window for date selection.

T. **Type** – This field defaults to the Type specified for the Calendar Code. When this field is set to Task, the record will be displayed in the Task List. Tasks need to be completed. End Times are not allowed, but they can have Due Dates and Start Times.

U. **Priority** – This field is used to assign tasks a priority of importance on a scale from zero to nine, where zero is the highest priority. The priority determines the order in which tasks are displayed for both the Event Calendar and the Task List.