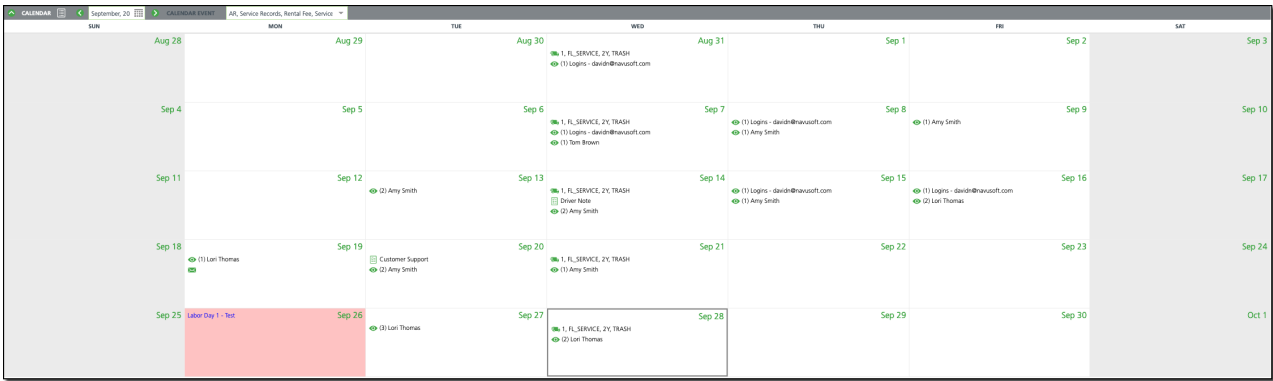


# Calendar Information

Last Modified on 02/13/2024 3:36 pm EST

**Pathway:** [Accounts](#) > [Search \(Accounts\)](#) > [Calendar \(Section\)](#)

The Customer Calendar tool displays actionable items applied to an account, records users who have viewed the account, and includes right-click functionality to access additional features such as adding an active service, or recording a customer request. The Calendar can be viewed in either Calendar view, or List view.



## Permissions

Permission ID	Permission Name
5	View Account
6	View Site

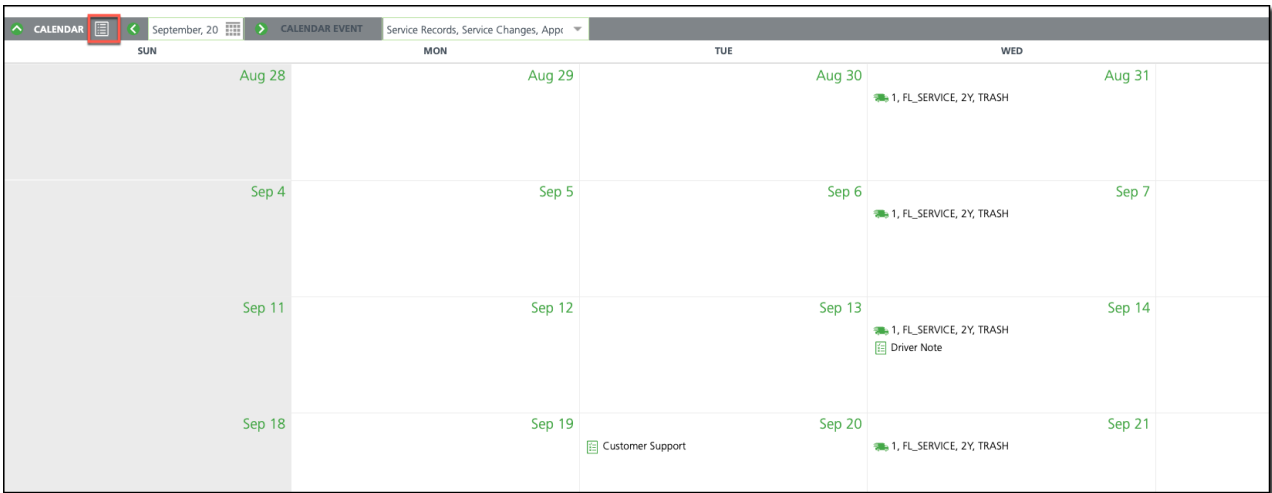
## Calendar/List View Toggle

By default, the Calendar view displays for all accounts. To change the view, select the Calendar/List toggle located in the header section.

- **Calendar View** - displays in a standard calendar format and is the default view for all accounts.
- **List view** - displays calendar events in a listed order sorted by date.

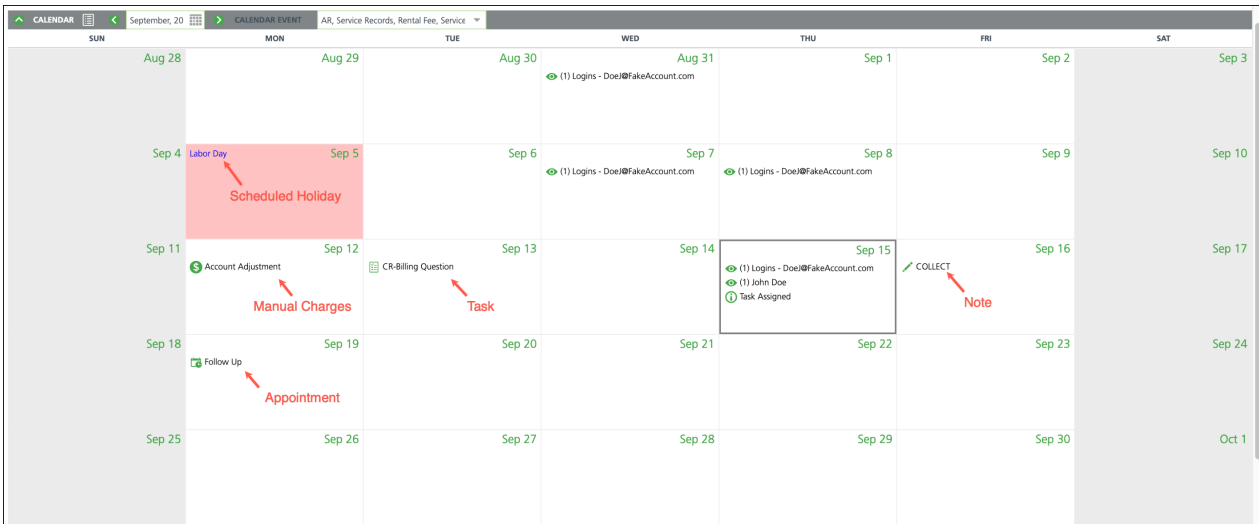


In either view, select the Calendar Events in the drop down to filter what you would like to view.



## Calendar Events

The following section details the Calendar Events that display.



Calendar Event Type	Description
<b>Logins</b>	Displays the login name for each user on the date they viewed the account.
<b>Scheduled Holiday</b>	Displays holidays that have been created in the Holiday Schedule tool. Hover over the holiday to see any added notes.
<b>Manual Charges</b>	Displays the name of the Charge Code for the Manual Charge. Select the Manual Charge to Add, Edit or Delete this charge.
<b>Service Records</b>	Displays when a Service Request has been recorded on the Calendar.
<b>Rental Fee</b>	Displays when a Rental Fee has been charged to the customer.
<b>Service Changes</b>	Displays the Service Change Type on the day a change was applied.
<b>System</b>	Displays the date a logged in employee has viewed the account.
<b>Appointment</b>	Displays appointments recorded for the account. When an appointment is created, the selection from the Type field displays.

<b>Cancellation</b>	Displays cancellation of any events on the calendar that were previously set up.
<b>Complaint</b>	Displays customer complaints and the date they were reported.
<b>Email</b>	Displays any emails sent that day.
<b>Note</b>	Displays Notes added to this account. When the note is created, the selection from the Note Type field displays.
<b>Task</b>	Displays tasks created for the account. When a task is created, the selection from the Type field displays.
<b>Text Message</b>	Displays text message generated alerts for the account.
<b>Survey</b>	When a survey has been done by a customer it will appear on the calendar. Click on the event to see the answers.

---