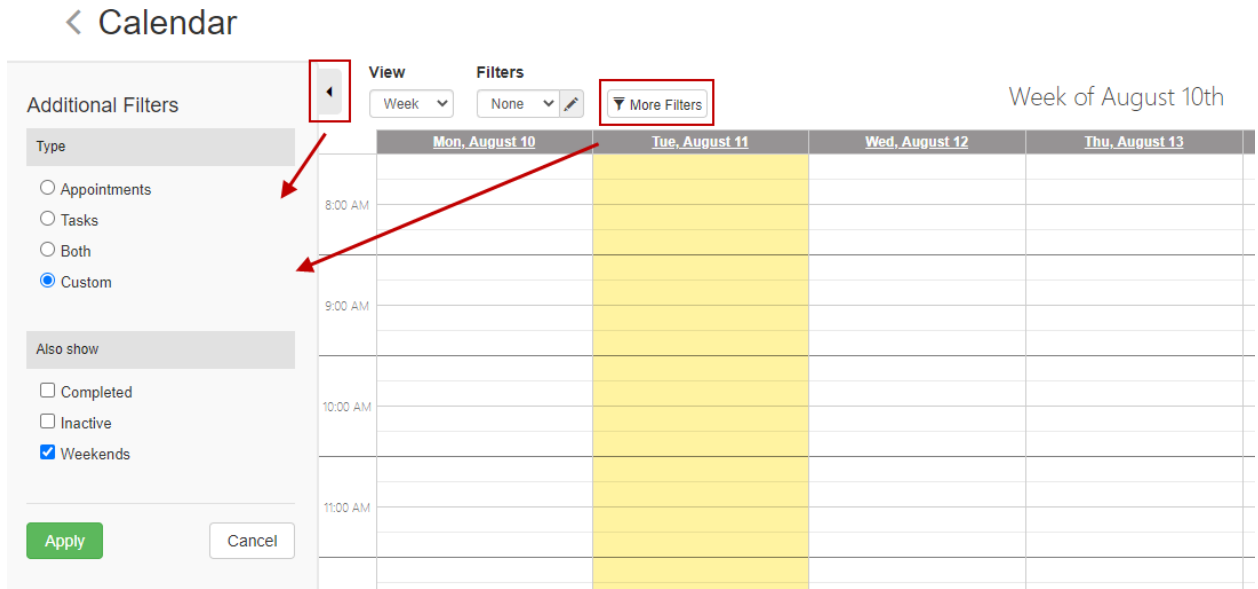


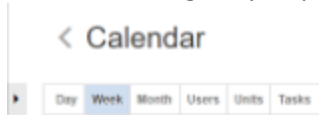
Calendar New Feature Update

New Features

- More Filters button allows you to easily expand the Additional Filters pane. You can still use the arrow to expand the Additional Filters pane.

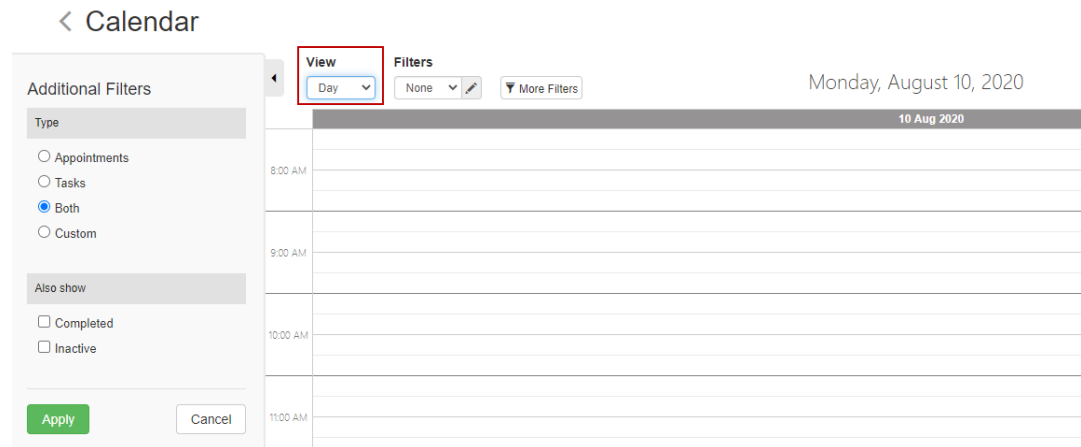


- Views were originally displayed as individual buttons across the top left screen.



Now you can access each of the view under the View drop-down button.

- Day





Calendar New Feature Update

Week

< Calendar

View: Week Filters: None More Filters

Week of August 10th

	Mon, August 10	Tue, August 11	Wed, August 12	Thu, August 13	Fri, August 14	Sat, August 15	Sun, August 16
8:00 AM							
9:00 AM							
10:00 AM							
11:00 AM							

Additional Filters

Type

- Appointments
- Tasks
- Both
- Custom

Also show

- Completed
- Inactive
- Weekends

Apply Cancel

Month

< Calendar

View: Month Filters: None More Filters

August 2020

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
27							
28							
29							
30							
31							
01							
02							
03							
04							
05							
06							
07							
08							
09							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							
21							
22							
23							

Additional Filters

Type

- Appointments
- Tasks
- Both
- Custom

Also show

- Completed
- Inactive
- Weekends

Apply Cancel

Users

< Calendar

View: Users Filters: None More Filters

Week of August 10th

	Mon, Aug 10	Tue, Aug 11	Wed, Aug 12	Thu, Aug 13	Fri, Aug 14	Sat, Aug 15	Sun, Aug 16
3545A							

Additional Filters

Type

- Appointments
- Tasks
- Both
- Custom

Date Range

- Day
- Week
- Month

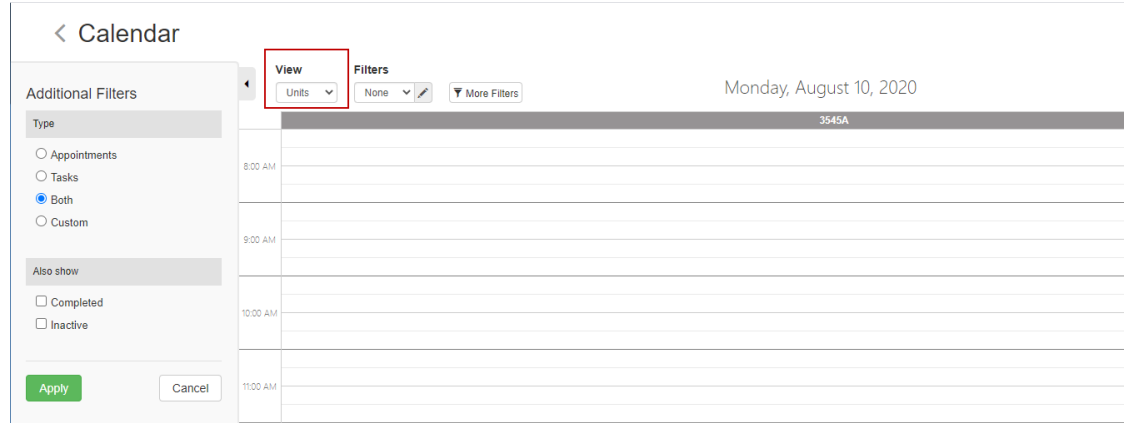
Also show

- Completed
- Inactive
- Weekends

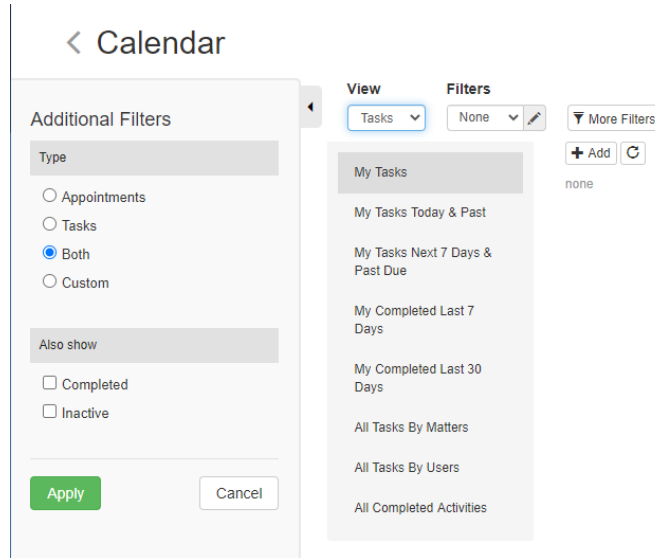
Apply Cancel

Calendar New Feature Update

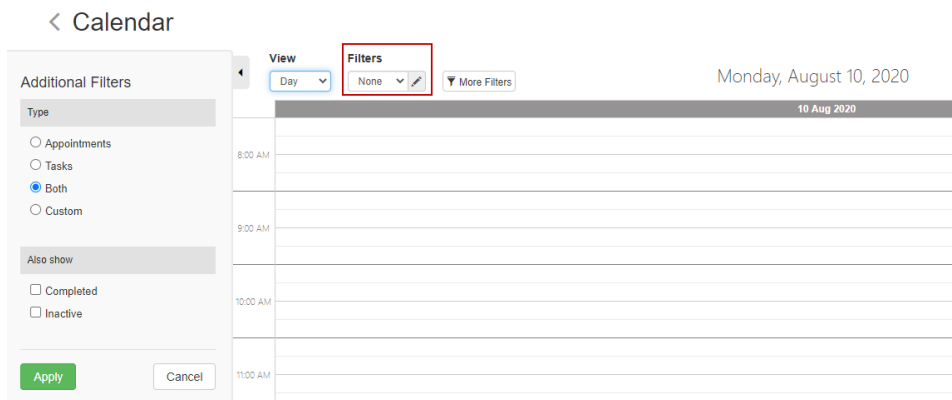
Units



Tasks



- Filters will allow you to set multiple views without having to click on the Custom button and select those individual calendars you want displayed.

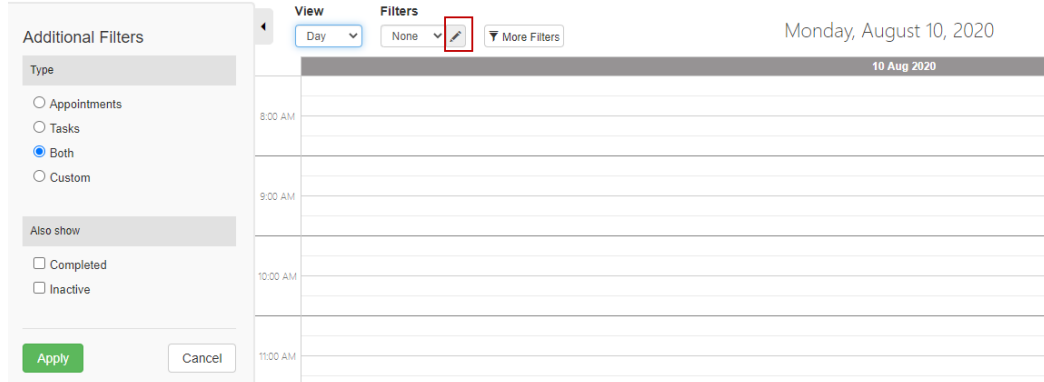


Calendar New Feature Update

Setting up Filters

1. Click on the pencil icon under the Filters drop-down button.

< Calendar



The screenshot shows a calendar interface for Monday, August 10, 2020. At the top, there are 'View' and 'Filters' dropdown menus. The 'Filters' menu is currently set to 'None' and has a pencil icon next to it, which is highlighted with a red box. Below the calendar grid, there is an 'Additional Filters' sidebar with options for 'Type' (Appointments, Tasks, Both, Custom) and 'Also show' (Completed, Inactive). There are 'Apply' and 'Cancel' buttons at the bottom of the sidebar.

2. Give your filter a name. This is the name that will appear in the Filter drop-down button.

Manage Calendar Filters ✕

Existing Filters ?

New Filter... + New

Filter Name ? "Paralegals"

Paralegals includes Activities where ANY of the following are true:

3. Set the View Type.
 - a. Private – only the creator can view the filter
 - b. Protected – only the creator can edit/delete the filter, but everyone can view the filter
 - c. Public – anyone can view/edit/delete the filter

Manage Calendar Filters

Existing Filters ?

New Filter... + New

Filter Name ? "Pa

Paralegals incl

View Type ?

Private Protected Public

Calendar New Feature Update

4. Set the Match criteria option.
 - a. Any – Select any to include activities where at least one of the conditions should be met.
 - b. All – Select all if all the conditions should be met.

Manage Calendar Filters ✕

Existing Filters ?
New Filter... + New

Filter Name ?
Paralegals

"Paralegals"
includes Activities where ANY of the following are true:

View Type ?
 Private Protected Public

Match ? Any All Include Group Members ?

Manage Calendar Filters ✕

Existing Filters ?
New Filter... + New

Filter Name ?
Paralegals

"Paralegals"
includes Activities where ALL of the following are true:


View Type ?
 Private Protected Public



Match ? Any All Include Group Members ?



Calendar New Feature Update


- Set the Include Group Members option. If the filter includes any Group conditions, checking this will pull Activities for Users who belong to the scheduled Group as well as Activities that only specify the Group. Uncheck to only pull Activities where the Group itself is scheduled.


Manage Calendar Filters

Existing Filters 


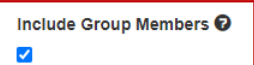
New Filter...  

Filter Name  "Paralegals" 

Paralegals 

View Type 


Private Protected Public



Match  


Any All


- Select the Record Type. The User type will be the most common type selected. This allows you to select individual's calendars. You can also create filters that include certain Contacts, Matters and or Groups.

Manage Calendar Filters


Existing Filters 


New Filter...  


Filter Name  Paralegals


View Type 

Private Protected Public

Match  Any All

Include Group Members 

Record Type 


Contact 


Contact

Matter

Group

User

Contacts 

Search... 

Calendar New Feature Update

- Once you have selected the record type you will see the drop-down selection to the right change. Click on the arrow to see the drop-down choices and select an item.

Manage Calendar Filters

Existing Filters ?

New Filter... + New

Filter Name ?

Paralegals

View Type ?

Private Protected Public

Match ?

Any All

Include Group Members ?

Record Type

User

Users

Search... q

Add

- 3545A
- 3545B
- 3545C

- Click the Add button to add this selection to the criteria list.

Manage Calendar Filters

Existing Filters ?

New Filter... + New

Filter Name ?

Paralegals

"Pa

incl

View Type ?

Private Protected Public

Match ?

Any All

Include Group Members ?

Record Type

User

Users

3545A q

Add

Calendar New Feature Update

9. You will see the ‘includes Activities where ALL/ANY of the following are true:’ be updated with your item.

Manage Calendar Filters ✕

Existing Filters ?

New Filter... ▼ + New

Filter Name ?

View Type ?
 Private Protected Public

Match ? Any All

Include Group Members ?

Record Type ▼

Users 🔍 ▼ Add

"Paralegals"
includes Activities where ALL of the following are true:

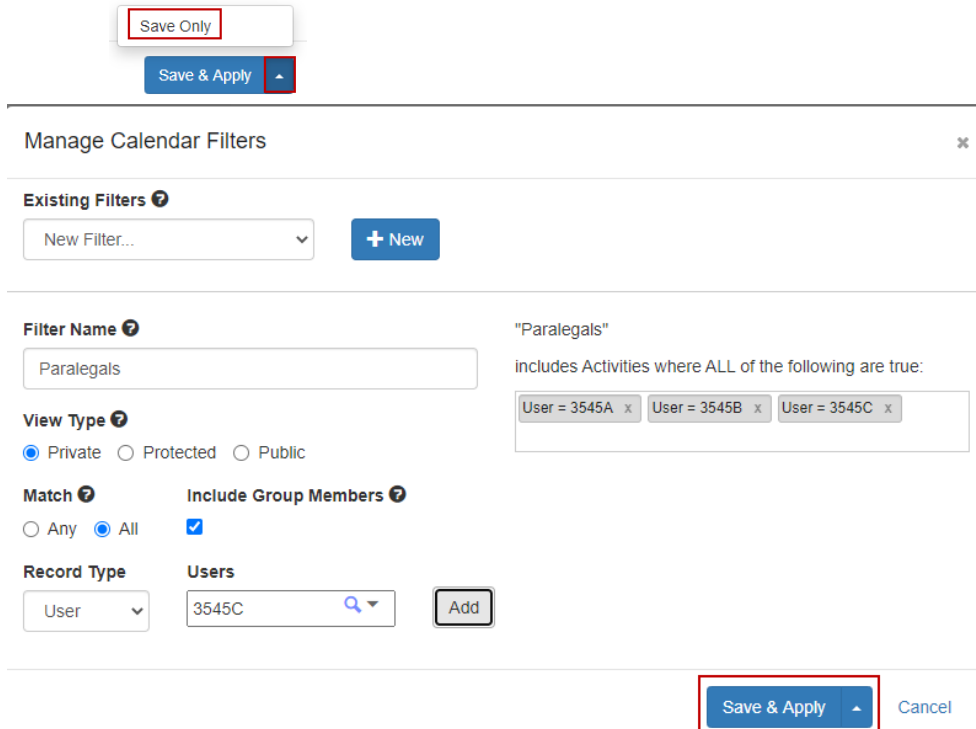
User = 3545A ✕

Save & Apply ⬅ Cancel

10. Repeat steps 7&8 to continue adding users to the view.
 - a. You can also switch to another Record Type and add those records to this same filter.

Calendar New Feature Update

11. Once you are finished with this view click on the Save & Apply button. This will save your new filter and apply the filter to the calendar upon saving.
 - a. You can also click the arrow to the right of the Save & Apply button and select Save Only. This will allow you to save the filter, but it will not apply the filter to the calendar upon saving.



Manage Calendar Filters

Existing Filters ?

New Filter... [+ New](#)

Filter Name ?

Paralegals

View Type ?

Private Protected Public

Match ?

Any All

Include Group Members ?

Record Type

User

Users

3545C [Add](#)

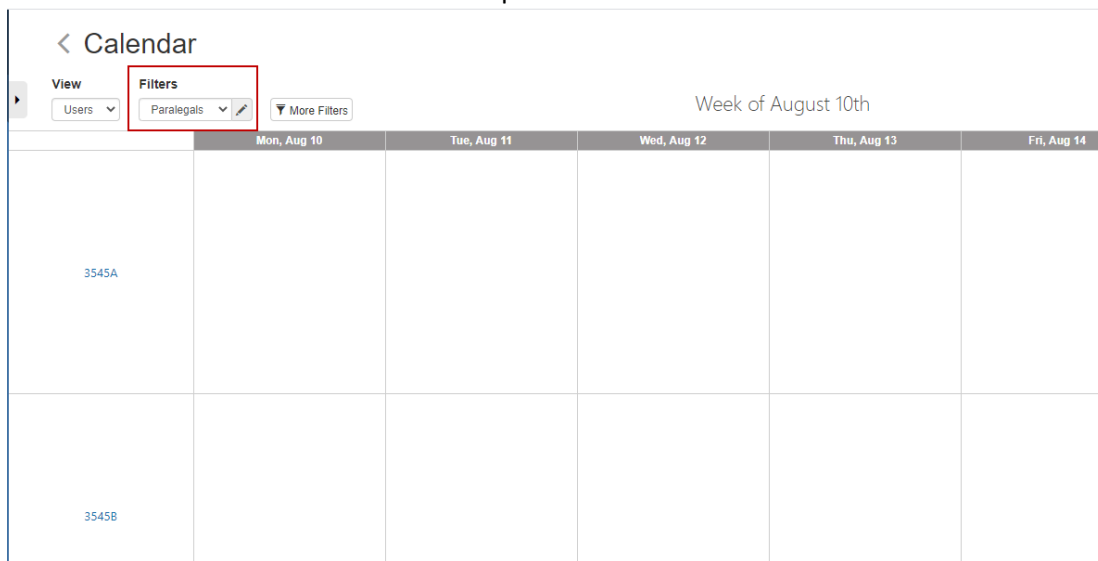
"Paralegals"

includes Activities where ALL of the following are true:

User = 3545A x User = 3545B x User = 3545C x

[Save & Apply](#) [Cancel](#)

12. You will now see the new Filter in the drop-down selection.



< Calendar

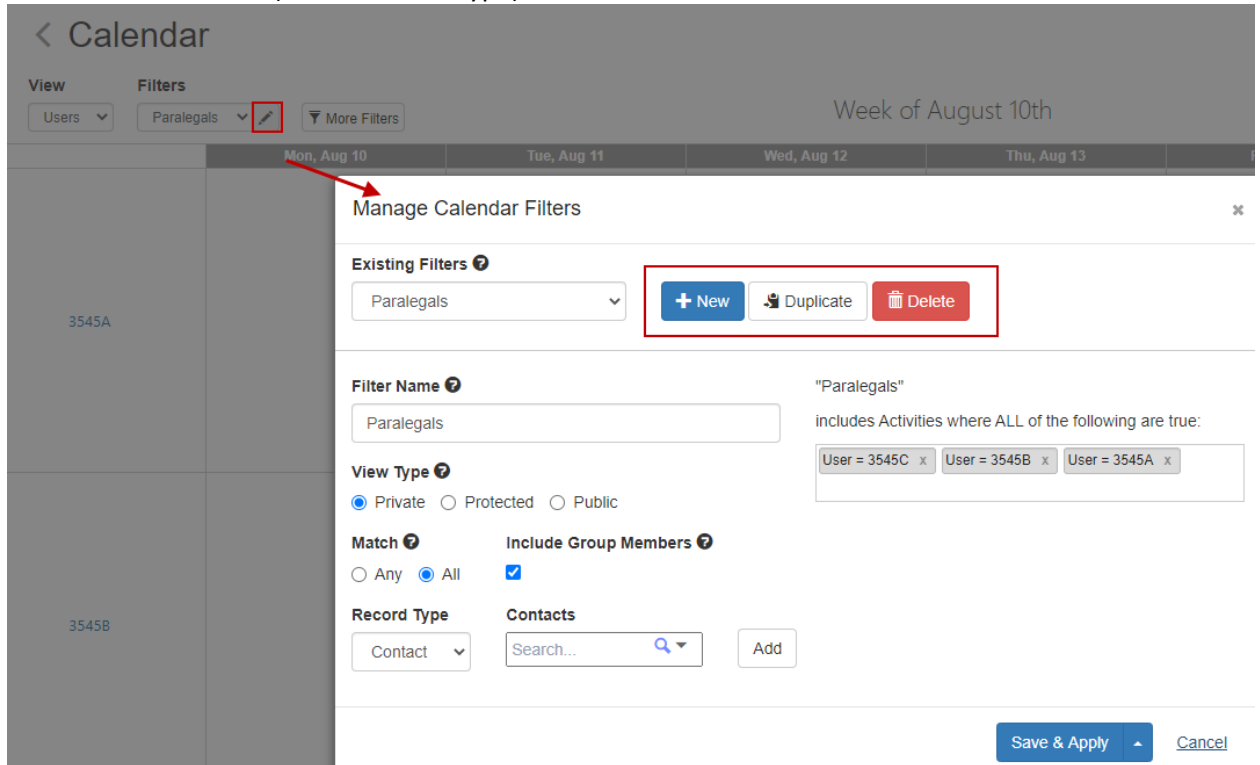
View: Users **Filters** Paralegals [More Filters](#)

Week of August 10th

	Mon, Aug 10	Tue, Aug 11	Wed, Aug 12	Thu, Aug 13	Fri, Aug 14
3545A					
3545B					

Calendar New Feature Update

13. You can always click on the pencil icon under the Filters drop-down button to perform the following actions.
- Edit the existing filter (based on view type)
 - Create a new filter
 - Duplicate a filter
 - Delete a filter (based on view type)



The screenshot displays the 'Calendar' interface with a 'Manage Calendar Filters' dialog box open. The dialog is titled 'Manage Calendar Filters' and features a close button (X) in the top right corner. It is divided into several sections:

- Existing Filters:** A dropdown menu shows 'Paralegals' selected. To its right are three buttons: '+ New' (blue), 'Duplicate' (grey), and 'Delete' (red). A red box highlights these three buttons.
- Filter Name:** A text input field contains 'Paralegals'.
- View Type:** Three radio buttons are present: 'Private' (selected), 'Protected', and 'Public'.
- Match:** Two radio buttons are present: 'Any' and 'All' (selected).
- Include Group Members:** A checkbox is checked.
- Record Type:** A dropdown menu shows 'Contact' selected.
- Contacts:** A search input field with a magnifying glass icon and an 'Add' button.

At the bottom of the dialog, there are two buttons: 'Save & Apply' (blue) and 'Cancel' (grey). The background shows a calendar grid for the week of August 10th, with a 'Filters' dropdown menu open, showing 'Paralegals' and a pencil icon next to it. A red arrow points from the pencil icon to the 'Manage Calendar Filters' dialog box.