



# Module SynoRescheduler

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<b>Date</b>	7/8/2009
<b>Version</b>	1.0



# Module SynoRescheduler

<b>1. INTRODUCTION .....</b>	<b>3</b>
<b>2. INSTALLATION .....</b>	<b>3</b>
2.1. Requirements.....	3
2.2. Installation.....	3
<b>3. HOW TO USE THE MODULE?.....</b>	<b>5</b>
<b>4. HOW TO UNINSTALL THIS MODULE.....</b>	<b>9</b>
<b>5. SYNOLIA.....</b>	<b>9</b>
<b>6. LICENSES.....</b>	<b>9</b>
6.1. Synolia Terms and conditions.....	9
<b>7. USEFUL LINKS : .....</b>	<b>9</b>

## 1. Introduction

This module, built by SYNOLIA, allows you to quickly reschedule a call or a Meeting. You can even choose when you want to reschedule this Call/Meeting and specify a reason why you reschedule it.

## 2. Installation

### 2.1. Requirements

In order to install and use the SynoRescheduler module you must have access to an original version of SugarCRM installed on a server with full administration rights. Your SugarCRM must be standard and the original source code must be preserved. Customizations made via Studio are supported.

This module is available for all SugarCRM flavors : **Community Edition, Professional et Enterprise.**

SYNOLIA can not be held responsible in any way for the use you may have of the SynoRescheduler.

### 2.2. Installation

SynoRescheduler is a classic SugarCRM module, you should install through « Module Loader ».

SYSTEM			
<a href="#">System Settings</a>	Configure system-wide settings	<a href="#">Backups</a>	Perform a backup
<a href="#">Scheduler</a>	Set up scheduled events	<a href="#">Repair</a>	Check and repair Sugar Suite
<a href="#">Diagnostic Tool</a>	Capture system configurator for diagnostics and analysis	<a href="#">Currencies</a>	Set up currencies and currency rates
<a href="#">Upgrade Wizard</a>	Upload and install Sugar Suite upgrades	<a href="#">Module Loader</a>	Add or remove Sugar modules, themes, and language packs
<a href="#">Locale Settings</a>	Set default localization settings for your system.	<a href="#">View Offline Clients</a>	View Offline Clients that are connected to this system

Nom	Type	Version	Date de publication	Désinstallable	Description
SynoRescheduler	Module	20090616	2009-07-02 11:19:45	Yes	Reschedule Calls and Meetings

You must read and accept the “Terms of the licence” of the module before using it.

The module is ready to be installed.

**License** | **Readme**

**Please read the following License Agreement:**

This text is in French and English / Ce texte est en Français et Anglais  
English can be find after the French part / Vous trouverez l'Anglais après la partie Française.

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L'utilisation du module SynoGeoloc implique que vous comprenez et acceptez les conditions d'utilisation Google Maps API Terms of Use disponible à l'url <http://www.google.com/apis/maps/terms.html>

SYNOLIA ne pourra pas être tenu pour responsable de l'utilisation que vous faites de ce module.

Accept  Deny

**Commit** | **Cancel**

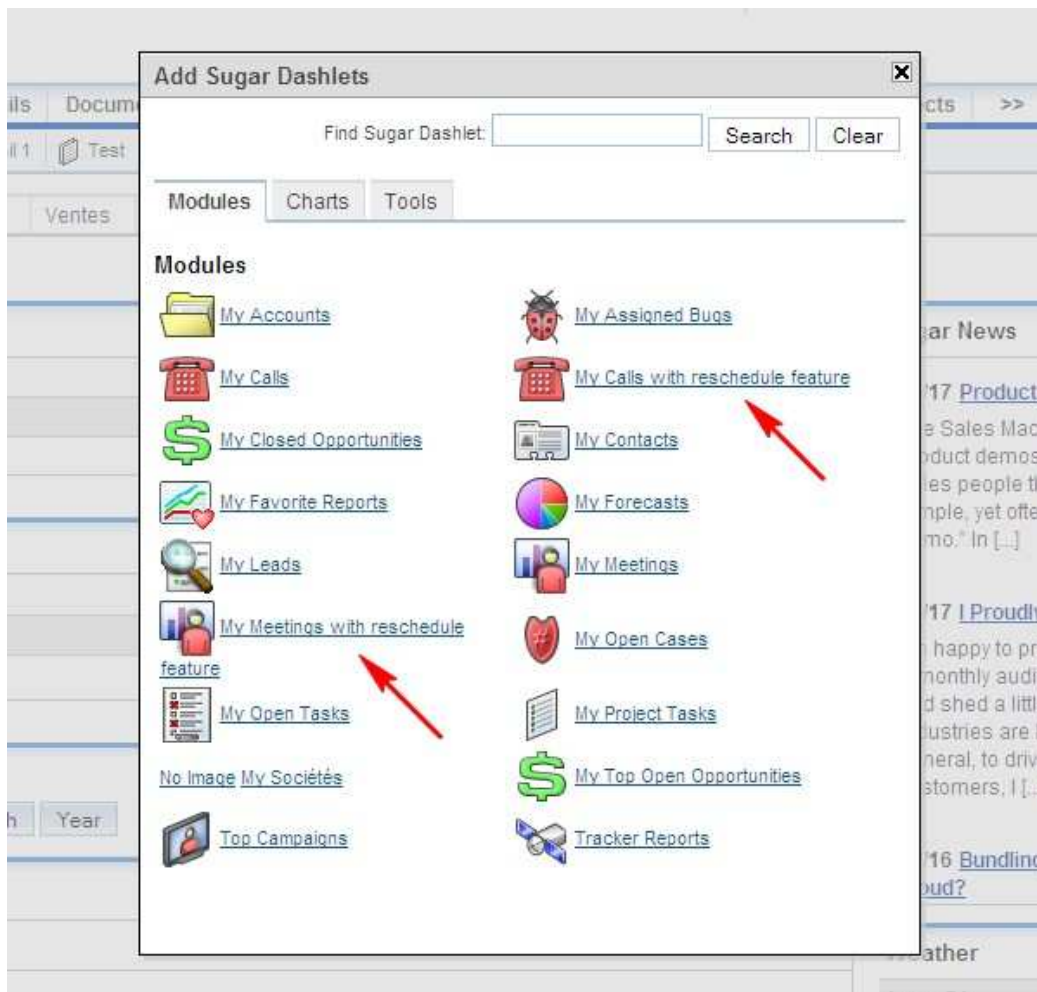
1


2

### 3. How to use the module?

As soon as the module is installed you should be able to use in any Call's Detail View or any Meeting's Detail View.

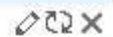
There is also two new dashlets available: "My Calls with reschedule feature" and "My meetings with reschedule feature".



To reschedule a Call or a Meeting click on the icon : a dropdown appears allowing you to choose when and why you want to reschedule this Meeting or Call.

Find below some screenshots of the different step.

### My Meetings



(1 - 5 of 66)

Close	Subject	Duration	Start Date	Accept?
<input checked="" type="checkbox"/>	<a href="#">Introduce all players</a>	1h45m	21/01/2010 08:15	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input checked="" type="checkbox"/>	<a href="#">Introduce all players</a>	3h00m	01/07/2009 15:45	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input checked="" type="checkbox"/>	<a href="#">Initial discussion</a>	0h00m	19/06/2009 10:15	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input checked="" type="checkbox"/>	<a href="#">Introduce all players</a>	3h45m	08/09/2009 10:30	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input checked="" type="checkbox"/>	<a href="#">Initial discussion</a>	1h30m	11/11/2009 09:45	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

### My Meetings



(1 - 5 of 66)

Close	Subject	Duration	Start Date	Accept?
<input checked="" type="checkbox"/>	<a href="#">Introduce all players</a>	1h45m	21/01/2010 08:15	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input checked="" type="checkbox"/>	<a href="#">Introduce all players</a>	3h00m	01/07/2009 15:45	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input checked="" type="checkbox"/>	<a href="#">Initial discussion</a>	0h00m	19/06/2009 10:15	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input checked="" type="checkbox"/>	<a href="#">Introduce all players</a>	3h45m	08/09/2009 10:30	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input checked="" type="checkbox"/>	<a href="#">Initial discussion</a>	1h30m	11/11/2009 09:45	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Reschedule

Reschedule

– Reschedule tomorrow because –

- Out of Office
- Holidays
- Out for Lunch
- In a meeting
- Buzy

– Reschedule next week because –

- Out of Office
- Holidays
- Out for Lunch**
- In a meeting
- Buzy

### My Calls



Close	Subject	Duration	Start Date	Accept?
<input checked="" type="checkbox"/>	<a href="#">Discuss Review Process</a>			
<input checked="" type="checkbox"/>	<a href="#">Get More information on the proposed deal</a>	0h30m	11/11/2009 15:15	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

### My Meetings

(1 - 5 of 66)

Close	Subject	Duration	Start Date	Accept?
<input type="checkbox"/>	<a href="#">Introduce all players</a>	1h45m	21/01/2010 08:15	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Introduce all players</a>	3h00m	01/07/2009 15:45	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Initial discussion</a>	0h00m	19/06/2009 10:15	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Introduce all players</a>	3h45m	25/06/2009 10:30	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Initial discussion</a>	1h30m	11/11/2009 09:45	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

The “Reschedule Action” also modifies the Description field of the rescheduled Call or Meeting: the Reason and the “Rescheduled date” will be added to the current Description.

SYNOLIA | Welcome, admin [Logout] | My Account | Employees | Admin | Training | About

Home | Dashboard | **Calendar** | Activities | Emails | Documents | Contacts | Accounts | Campaigns | Leads | Opportunities | Projects | >>

Last Viewed: [Introduce all p](#) | [DEV090001](#) | [Campagne avec d](#) | [Email 1](#) | [Test](#) | [Sugar Mod](#) | [SYNOLIA](#) | [AB-TEST-200905-SYN](#)

Shortcuts: Schedule Call, Schedule Meeting, Create Task, Create Note or Attachment, Archive Email, Calls, Meetings, Tasks, Notes, Emails, Today, Import

#### Meetings: Introduce all players

Print ? Help

Edit Duplicate Delete Close and Create New Close Reschedule

Subject:	Introduce all players	Status:	Planned
Location:		Accounts:	<a href="#">5D Invest A/S 538492</a>
Start Date & Time:	21/01/2010 08:15	Duration:	1h 45m
Team:	West	Created:	11/05/2009 14:25 by admin
Assigné à:	sarah	Modified:	11/05/2009 14:25 by admin
Reminder:	<input type="checkbox"/>	Description:	Meeting to discuss project plan and hash out the details of implementation

All Sales Marketing Support Other

Reschedule dropdown menu:

- Reschedule
- Reschedule tomorrow because --
- Out of Office
- Holidays
- Out for Lunch
- In a meeting
- Buzy
- Reschedule new week because --
- Out of Office
- Holidays
- Out for Lunch
- In a meeting
- Buzy

#### Meetings: Introduce all players

Print ? Help

Edit Duplicate Delete Close and Create New Close Reschedule

Subject:	Introduce all players	Status:	Planned
Location:		Accounts:	<a href="#">NW Capital Corp 902964</a>
Start Date & Time:	25/06/2009 10:30	Duration:	3h 45m
Team:	West	Date Modified:	18/06/2009 15:55 by admin
Assigné à:	max	Date Created:	11/05/2009 14:25 by admin
Reminder:	<input type="checkbox"/>	Description:	18/06/2009 15:55 - Out for Lunch ----- Meeting to discuss project plan and hash out the details of implementation

Administrators can easily modify the list of “Reasons” and the list of “Delay”  
 To do so they only have to go into the Admin section and modify the RESCHEDULE\_OPTIONS and RESCHEDULE\_REASONS dropdown lists.

Dropdown Editor **Edit Dropdown** ✕











Save Undo Redo

---

Name: RESCHEDULE\_REASONS  
 Language: English (US) ▼

List Items:

Item Name[Display Label]

Out of Office[Out of Office]	 
Holidays[Holidays]	 
Out for Lunch[Out for Lunch]	 
In a meeting[In a meeting]	 
Buzy[Buzy]	 

Item Name:  Display Label:

Add

Sort Ascending Sort Descending

Dropdown Editor **Edit Dropdown** ✕

Save Undo Redo

---

Name: RESCHEDULE\_OPTIONS  
 Language: English (US) ▼

List Items:

Item Name[Display Label]

1[tomorrow]	 
7[newt week]	 

Item Name:  Display Label:

Add

Sort Ascending Sort Descending



## **4. How to uninstall this module**

This module is uninstallable through the « Module Loader ».

## **5. Synolia**

**SYNOLIA** has deep expertise with Customer Resource Management (CRM) applications that enables us to help businesses, according to specific needs, building the best of breed solution. **SYNOLIA** provides support and services with customers for projects mainly from 5 to 1000 CRM users. Synolia is based in Lyon, FRANCE. For more information, call +33 (0)4 27 70 53 70 or visit <http://www.synolia.com>.

For additional information, please contact us: [sugar@synolia.com](mailto:sugar@synolia.com)

## **6. Licenses**

### **6.1. Synolia Terms and conditions**

Acquisition and Use of SynoRescheduler is submitted to SYNOLIA's Terms and Conditions. This module is sell under SugarCRM public Licence 1.1.3.

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If you wish to contribute to this code you MUST keep the licence text and you are encouraged to fill the contributors lines with your name and references and a description of your contribution.

## **7. Useful links :**

SugarCRM web site : <http://www.sugarcrm.com>

Synolia web site : <http://www.synolia.com>

GoogleMap web site : <http://www.google.com/apis/maps/>