

# Inviting Users And Contacts To Events

PlayMaker utilizes events to track activity and communication with accounts and contacts. For more information about creating events, or associating accounts and contacts to events, read [this post](#).

This article discusses how to invite other PlayMaker users and PlayMaker contacts to events created on a user's calendar.

**Note:** Inviting users or contacts to events can only be performed in the PlayMaker web environment.

## Inviting other PlayMaker users to an event

When creating a new event or editing an existing event, other PlayMaker users can be invited by:

- Edit or Create an event
- In the *Attendees* section, click the *Invite User* button.
- In the *Find a User* window that pops up, select the user(s) that should be invited.
- Click the *Attach Selected Results* button.

**New Event** [Save] [Save & New] [Cancel]

**Details**

Subject: Bi-weekly Alta Bates Meeting  
Location:   
Start Time: 11/23/2016 01:36 PM  All Day Event  
End Time: 11/23/2016 02:36 PM  
Show Time As: Busy  
Recurrence: Weekly  
Every 2 week(s) on  
 Sunday  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  
End Date: 02/23/2017  
If blank, we will create as many recurrences as possible.

Importance:   
Reminder: None  
Event Type: Meeting  
Related Account: ALTA BATES MEDICAL A

**Event Purpose and Expected Outcome**  
Build relationships, educate staff about our facility, generate referrals.

**Attendees** [Invite User] [Invite Contact] [Invite 2 Related Contacts] [Busy] [Out of Office]

Wednesday Nov. 23, 2016

INITE	TYPE	ADDRESS	8AM	7AM	8AM	9AM	10AM	11AM	12PM	1PM	2PM	3PM	4PM	5PM	6PM	7PM	8PM	9PM	10PM	11PM
<input type="checkbox"/>		Natasha Romanoff	User																	

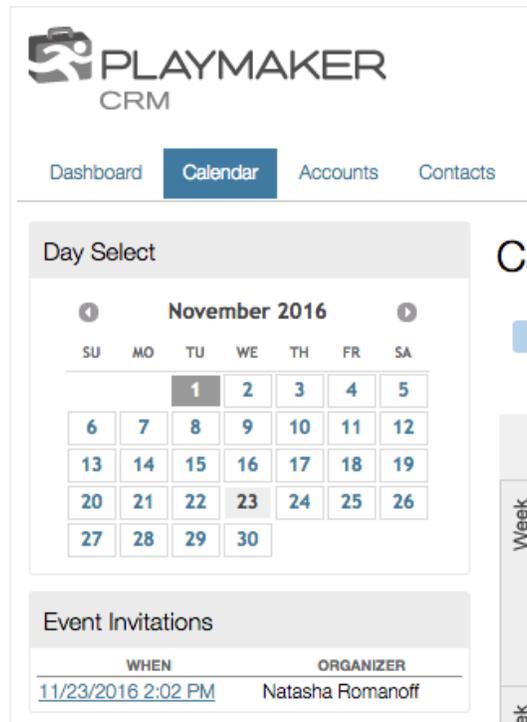
Send a copy of this event to my email

The user will now show in the *Attendees* list at the bottom of the *Event Details* or *New Event* screen. In order for the other user to receive an email notification about the event, the "Send email updates to all attendees" checkbox must be selected. Choosing this option is the best method to alert other users of the event.

- Send email updates to all attendees
- Send a copy of this event to my email

## Accepting an invitation to another user's event

Once a user has been invited to an event, they must accept the invite in order for the event to populate on their calendar, as well as to provide a response to the inviting user.



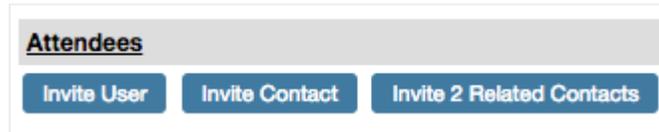
- Click on the *Calendar* link to view the calendar page.
- Below the monthly calendar in the left column, an Event Invitations box appears whenever there is a pending event invitation.
- Click on the event to see the details.
- Choose a response for the event, then click the appropriate button to send a reply.
- Add any notes to share with the event's originating user.

The event will now show on both users' calendars, and any added comments can be seen in the *Event Details* screen.

Attendees			
NAME	TYPE	RESPONSE	COMMENTS
Scott Lang	User	✔ Accepted	Thanks for including me on this!

### Inviting PlayMaker contacts to an event

Similarly, any contacts in the PlayMaker environment can be invited to an event. When an account is added to an event, users are prompted to add any contacts associated with that account, making it easy to have a list of possible attendees handy for each meeting. Users can also click the *Invite Contacts* button to invite any user in any account. Users can also select the *Invite X Related Contacts*, which will quickly add all contacts associated by the account (the number of which would replace the X on the button).



Once invited, all invited users and contacts will show in the Attendees section of the Event Details screen. Any contacts highlighted in red will not receive email updates (if the option is selected to send email updates) because the contact does not have a valid email address, as shown below.

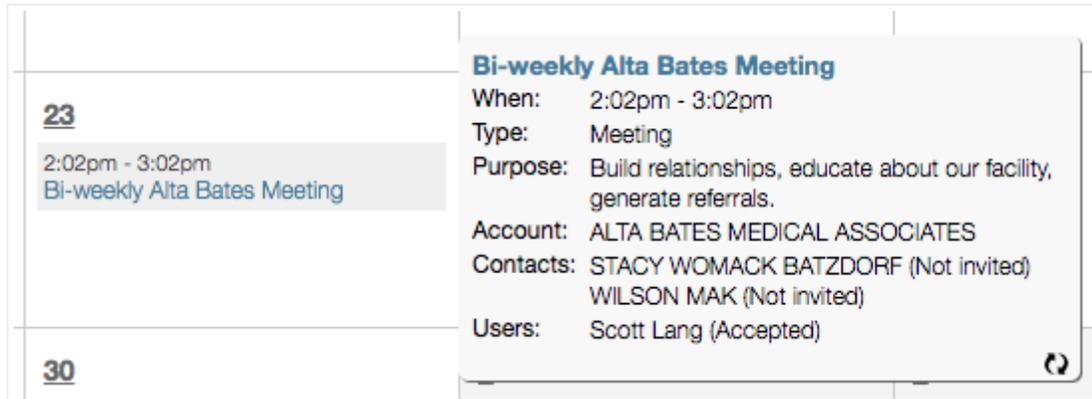
The highlighted attendees below cannot receive email updates to this event because they do not have a valid email address.

	INVITE	TYPE	ADDRESS	6AM	7AM	8AM	9AM	10AM
	Natasha Romanoff	User						
✘	Scott Lang	User						
✘	STACY WOMACK BATZDORF	Contact	📍					
✘	WILSON MAK	Contact	📍					

Send email updates to all attendees  
 Send a copy of this event to my email

## Viewing Attendee Responses

Mousing over the event on the *Calendar* page will show the list of attendees (shown below). In the provided example, two contacts were not invited due to not having email addresses, which explains why they appear as *Not invited*.



The screenshot shows a calendar event tooltip for "Bi-weekly Alta Bates Meeting". The event is scheduled for 2:02pm - 3:02pm on the 23rd. The tooltip provides the following details:

- When:** 2:02pm - 3:02pm
- Type:** Meeting
- Purpose:** Build relationships, educate about our facility, generate referrals.
- Account:** ALTA BATES MEDICAL ASSOCIATES
- Contacts:** STACY WOMACK BATZDORF (Not invited), WILSON MAK (Not invited)
- Users:** Scott Lang (Accepted)

Clicking on the event and viewing the *Event Details* will show the attendees responses in the *Attendees* section. The same event as above is being shown in the below example:

Attendees				
NAME	TYPE	RESPONSE	COMMENTS	
<a href="#">Scott Lang</a>	User	✔ Accepted	Thanks for including me on this!	
<a href="#">STACY WOMACK BATZDORF</a>	Contact	✘ Not invited		
<a href="#">WILSON MAK</a>	Contact	✘ Not invited		

## Important Notes

- Checking "Send email updates to all attendees" will update users or contacts should the event be modified on your calendar. **Attendees must have a valid email address to receive email notifications.**
  - If the contact does not have an email address entered, or has an invalid email (i.e. support@playmakercrm, which is missing part of the address, which would signify that it is valid, although maybe not correct), the contact will be highlighted in red, showing the user which attendees will not receive the invitation or update.

- Checking "Send a copy of this event to my email" will allow the user to add the event to their Outlook or other calendar application. While this is convenient, it is important to know that changes to an event added to Outlook will not make changes to the PlayMaker event. To edit events and update invitees, the **event must be updated in PlayMaker**.
  - Since events aren't linked directly to Outlook, event changes may generate an email that appears to be a new event, rather than suggesting an update to an existing event in Outlook.