

Calendar, events and notes

Tools and productivity

Documentation version 1.0
Published 17 November 2026
https://www.hesabuerp.co.ke/documentation/

Tools and productivity

Calendar, events and notes

Schedule meetings and reminders and keep shared notes.

Beginner · About 15 minutes · Version 1.0 · Updated 17 November 2026

Overview

The **Calendar** shows events, tasks and due dates in one place. **Notes** are short pieces of text you can share.

Steps

Add an event

1. Search for **Event**, or open **Calendar**, and click an empty date.
2. Enter the **Subject**, the **Starts On** and **Ends On** times, and the **Type** (*Private*, *Public* or *Public with participants*).
3. In **Event Participants**, add colleagues or customers, and set a **Repeat** schedule if it recurs.
4. Save. Invited staff see it on their calendars and are notified.

Reminders

Tick **Send an email reminder** and choose when. Use it for follow-up calls and payment collections.

Keep notes

1. Search for **Note** and click **Add Note**.
2. Enter a **Title** and the **Content**.
3. Tick **Public** to share it with everyone, or add people in **Share**.

Connect an outside calendar

If your plan includes it, you can link a Google Calendar. See Connecting other services.

Practical example

The sales rep creates a recurring event, *Monthly stock review*, with the shop manager and the storekeeper as participants. A note called *Delivery rules* is shared with all drivers.

Important notes

- Do not put passwords or confidential information in public notes.
- Private events are visible only to you.

Common mistakes

- Creating a *Public* event for a private meeting.

Next steps

Read Kanban boards, recurring documents and bulk tools.

Related documentation

- To Do, assignments and mentions
- Connecting other services