Custom Categories

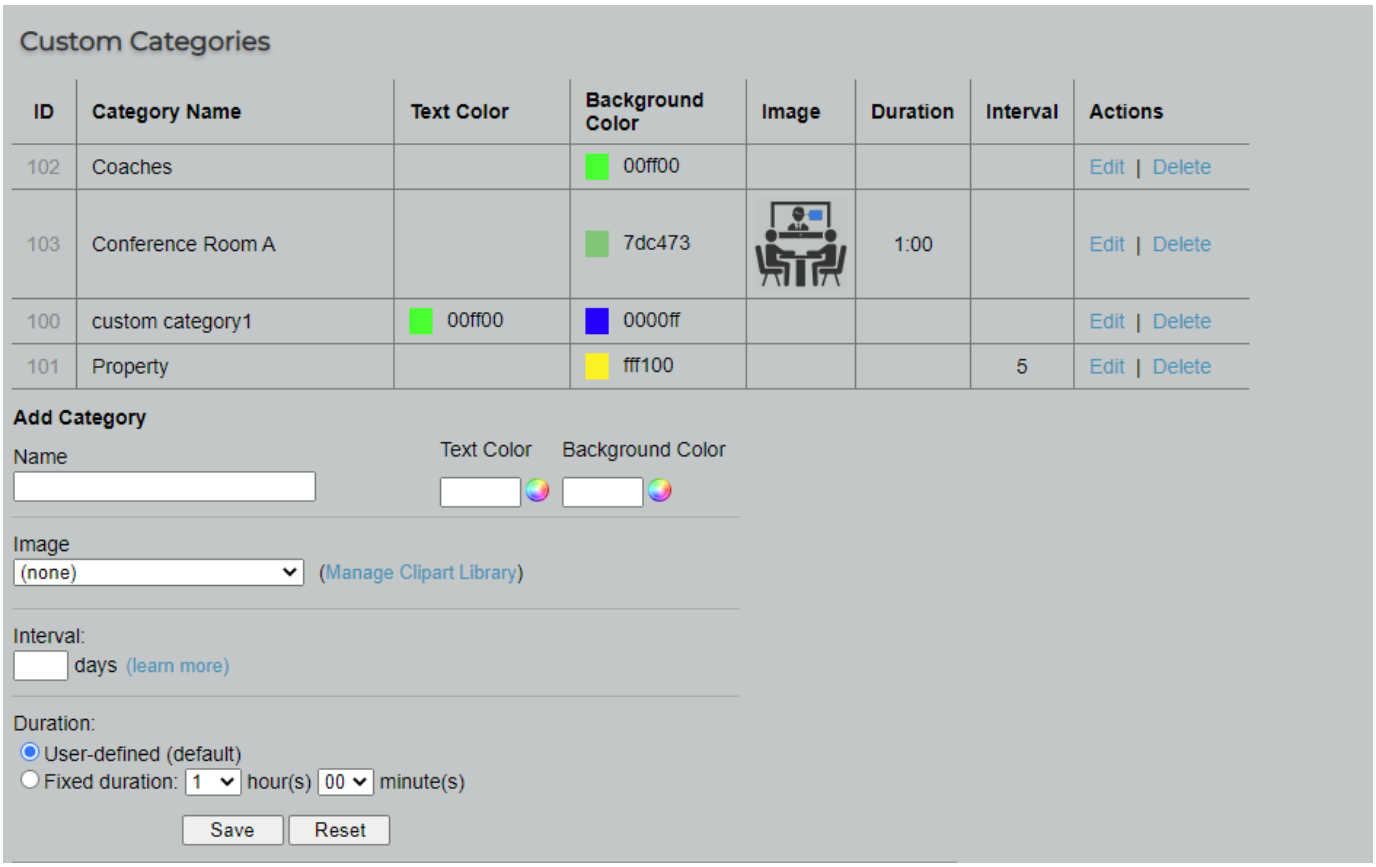
Creating Custom Categories

localendar offers a set of *default* event categories (General, Education, Entertainment, etc) to classify your events.
But you can create *your own* categories to help organize your events.

You access the Custom Category screen from the Event Editor, or by clicking Options, followed by the Events tab, where you will find an Edit categories link.

Once you've clicked that link, the Category Editor will be displayed:

(Note: Some of the features on the Category Editor will not be shown unless you have a Premium Webmaster subscription or Scheduling Upgrade). See below for more information.



The functionality is straightforward:

- To **add** a new category, just type in the Name and (optionally) select text and background colors for this category. Then click Save.
- To **edit** a category, click the Edit link next to the category's name. The form below the category list will change to say "Edit Category". Make your changes and click Save
- To **delete** a category, click the Delete link next to the category's name. When you remove a category, and events in that category will be moved to the localendar "General" category.

There are 3 checkboxes underneath the editor that determine other settings for your custom categories. **You don't need to click Save if you check/un-check any of these settings. localendar will record your choice automatically**.

1. By default, your public calendar will include a color-coded legend for your categories at the bottom of your calendar page. If you don't want this legend displayed, uncheck the "Include a category legend..." box. .
2. If you only want your categories displayed on the Event Editor when creating new events, check the "Hide default localendar categories when entering events" box.
3. If you only want your custom categories displayed on the public calendar, check the "Hide default localendar categories on the public calendar" box

Custom Category Images (requires Webmaster Premium subscription)

Your categories can automatically display custom images. For example, all events with the category "Exam Day" might show an image of a pencil or alarm clock. You can associate the image shown with the category in this section of the Category Editor

Custom Category Intervals (requires Webmaster Premium subscription)

Categories can have optional intervals (in Days) associated with them. This is useful for tracking events that repeat after a fixed number of days. Some examples are:

- Getting your car's oil changed (every 90 days)
- A recurring dentist appointment (event 6 months or about 180 days)
- A regular vehicle inspection (every 45 days)

You define the interval (in days) for the category on the Category Editor. Then, on the Event Editor, you create new events with this category. When you edit the event later, you will have a new option to "Save a copy + X days" (where X is the value you entered for Interval). This copy will have all the information of the current event, including reminders.

Here's how a garage might use this feature to manage it's customers:

> Mike is a customer who gets the oil changed on his Ford Mustang every 3 months. He also uses a special premium synthetic oil. The garage first creates a custom category called "Oil Change" with a 90 day Interval. The garage then creates an event on the calendar for March 15 for Mike's next appointment using this category (the garage also creates appointments for all their other customers, but we're just going to look at Mike for now). In the Event Description, the mechanic makes a note that Mike's car uses synthetic oil. He also adds an event reminder to send Mike an email 1 week before it's time to bring in his car.
>
> Mike comes in on March 15, and the service is performed. The mechanic opens the calendar, clicks on Mike's event and then clicks the "Save as copy + 90 days". Mike will automatically get a reminder 1 week before his next appointment in 90 days. If Mike decides to bring in his car early, the mechanic should first update the date on Mike's appointment entry to the day the work was performed, save it, and re-open it before creating a copy +90 days.

Custom Durations for Categories (requires Scheduling Upgrade)

If you are using the Scheduling upgrade on localendar, you may want to assign custom durations to your event categories. This is useful if you are scheduling resources in blocks that have a fixed time. For example, a hair salon may create a category for "basic cut" that automatically blocks the calendar for 1 hour, and a custom category for "dye job" might be automatically block 2 hours.

Example

Here is a sample teacher calendar that uses custom categories. The teacher teaches the same class multiple times a week to different sections. The sections meet at different times each day. To keep track of this schedule, the teacher has created a custom category for each section and color-coded them. This makes it easy to tell what sections meet on a particular day.

Other ideas for using custom categories include:

- Tracking what conference rooms are booked
- Keeping track of different committee meetings
- Categorizing free/busy/vacation times
- Differentiating between performances and rehersals