

Calendar: meetings with your team and clients

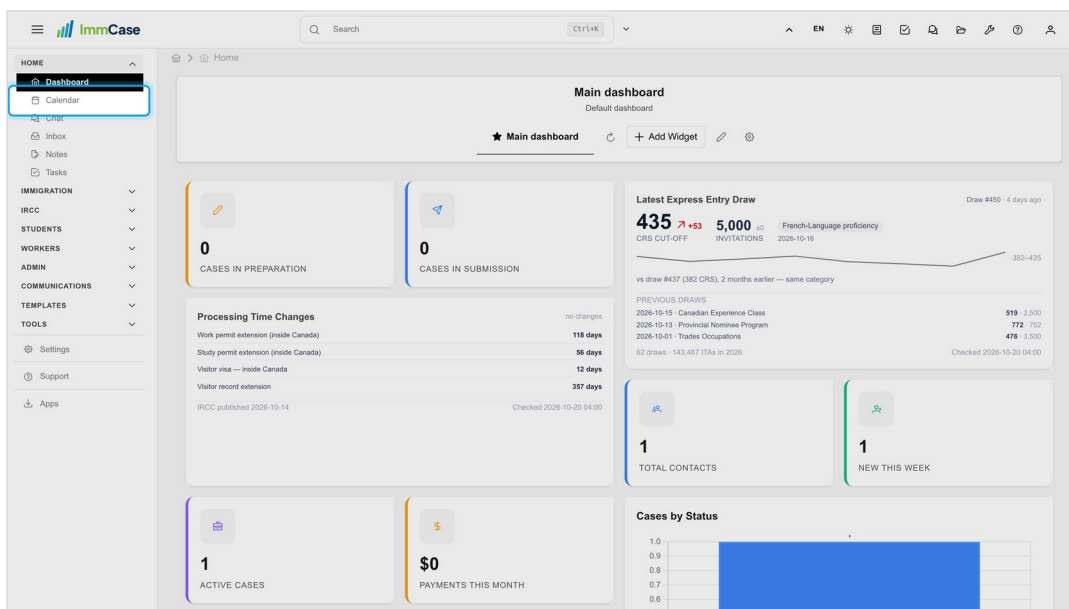
ImmCase · guides.immcase.ca · 2026-10-20

The **Calendar** holds the firm's meetings and shows your **tasks** on their due dates. Invite a colleague and a client to a meeting: ImmCase emails them an **invitation**, and reminds you before it starts.

The firm, its staff and the client («Daniela Ruiz») in this guide are **fictional**.

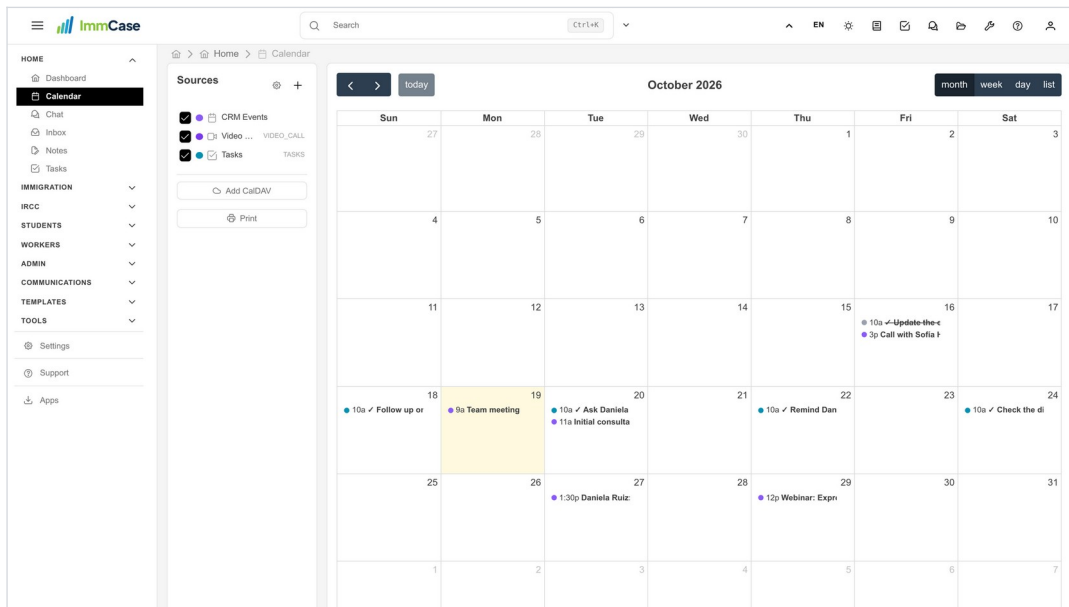
1. Open the Calendar

In the left menu, open **Home** and click **Calendar**.



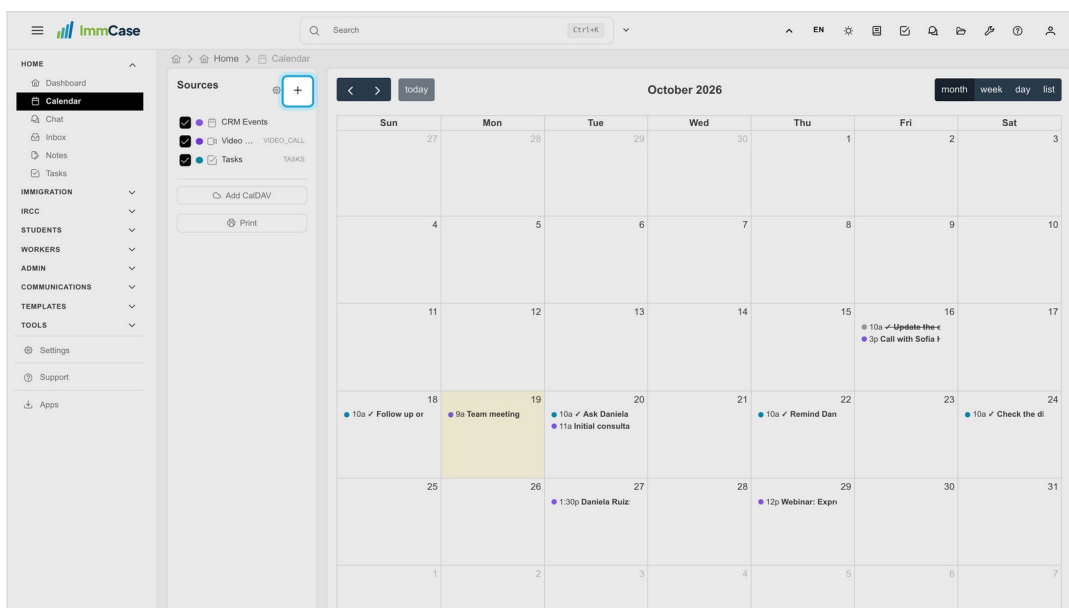
2. Meetings and tasks together

The month shows your meetings and, with a check mark, the **tasks** due each day. The **Sources** on the left switch each kind on or off.



3. New event

Click **+** next to **Sources**. You can also click a day or drag across hours in the week view.



4. Title and time

Type the **Title**, then the **Start** and **End**: pick the day in the calendar or type it (YYYY-MM-DD), then the time.

New Event

Title *

Document review with Daniela Ruiz

Start * 2026-10-21 10:00 AM

End 2026-10-21 10:45 AM

☐ All day event

Repeat

Does not repeat

Location

Location

5. Where and what for

Add the **Location** and, if it helps, a **Description**: the people you invite see both.

Repeat

Does not repeat

Location

Vancouver office

Description

Go through the checklist together before the study permit is submitted.

Participants

Internal users

Search users...

External (contacts, leads, companies, email)

6. Invite a colleague

Under **Internal users**, type a name and pick the person. The meeting appears in their calendar too.

The screenshot shows the ImmCase interface for creating a meeting. On the left, there are buttons for 'Add CalDAV' and 'Print'. The main area is divided into sections: 'Description' with the text 'Go through the checklist together before the study permit is submitted.', 'Participants' with a dropdown menu open showing 'Internal users' and 'Marc' selected, and 'Reminders' with '30 minutes before' and 'In-app' selected.

7. Invite the client

Under **External**, keep **Contact** and search for the client. You can also invite any email address.

The screenshot shows the ImmCase interface for creating a meeting. On the left, there are buttons for 'Add CalDAV' and 'Print'. The main area is divided into sections: 'Participants' with a dropdown menu open showing 'Internal users' and 'External (contacts, leads, companies, email)'. Under 'Internal users', 'Marc Tremblay' is selected. Under 'External (contacts, leads, companies, email)', 'Contact' is selected and 'Ruiz' is entered in the search field. Below this, there is a checkbox for 'Notify participants by email' which is checked, and the email address 'Daniela Ruiz (daniela.ruiz@immcasedigital.ca)' is entered. The 'Reminders' section shows '30 minutes before' and 'In-app' selected.

8. Invitations and reminders

Leave **Notify participants by email** on: each person gets an email invitation that adds the meeting to their own calendar. Under **Reminders**, ImmCase reminds you 30 minutes before; change the time or add one by email.

New Event

Location
Vancouver office

Description
Go through the checklist together before the study permit is submitted.

Participants

Internal users
Search users...

Marc Tremblay

Contact Search...

Daniela Ruiz (daniela.ruiz@immcasedigital.ca)

☒ Notify participants by email

Reminders
30 minutes before In-app

+ Add reminder

Video Call
☐ Add video call

Cancel Create

9. Create

Click **Create**.

participants by email

minutes before In-app

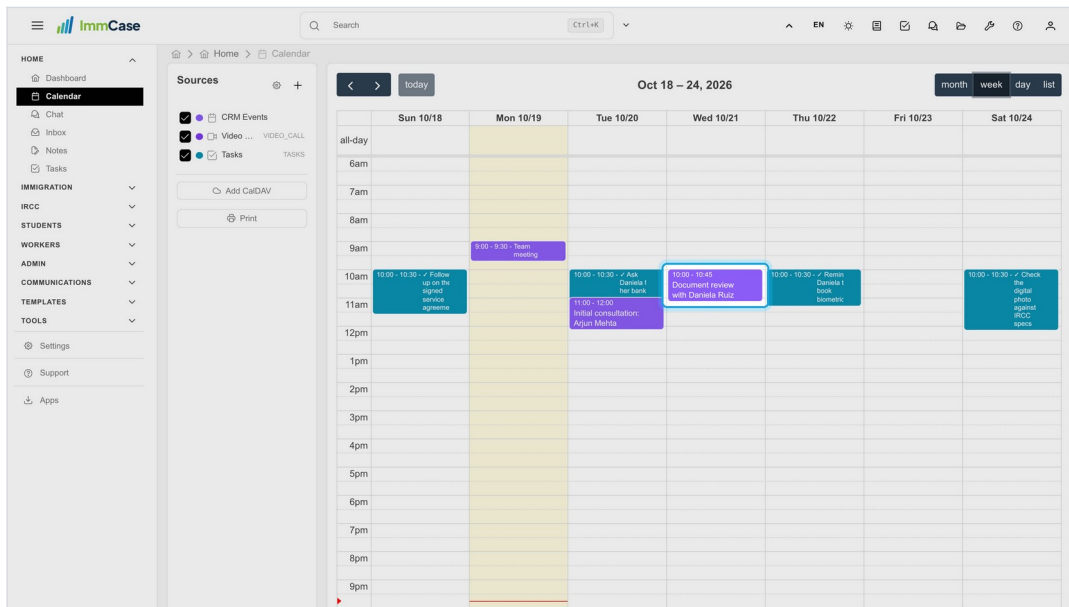
minder

leo call

Cancel Create

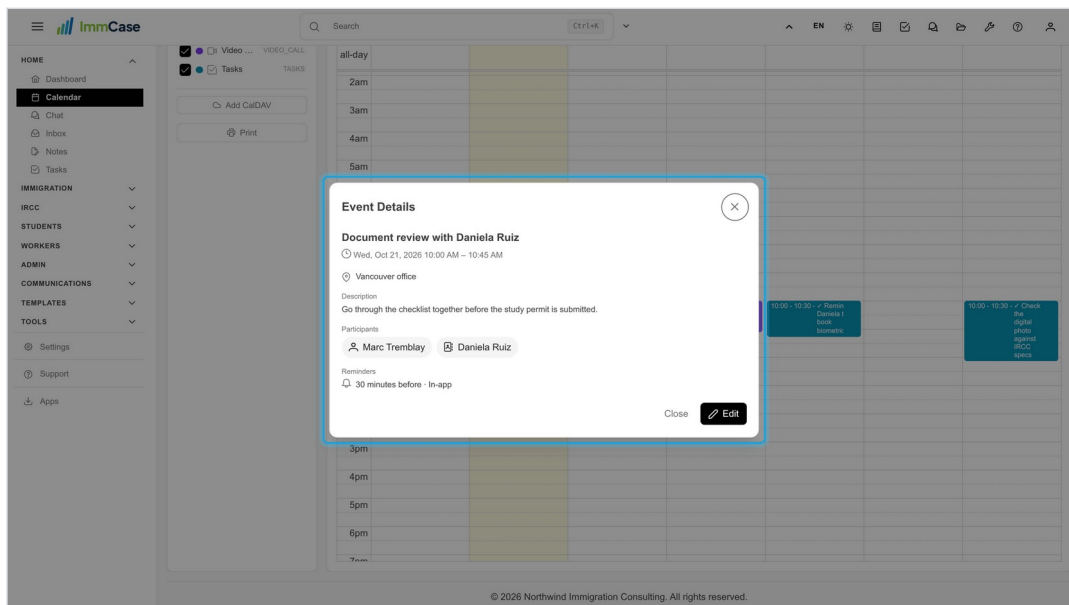
10. The week at a glance

Week shows each meeting at its time. Drag a meeting to move it, or drag its bottom edge to change how long it lasts.



11. Open a meeting

Click a meeting to see when and where it is, who is invited and its reminders. **Edit** changes it; tick **Notify participants by email** before saving to send them the change.



Good to know

- **A video call in one click:** tick **Add video call** in the event; the client joins from a link in their browser.
- **On your phone:** the gear next to **Sources** → **Sync to device** puts your ImmCase calendar in Apple Calendar, Outlook or Google Calendar.
- **Your other calendars:** **Add CalDAV** shows an outside calendar (iCloud, for example) next to your ImmCase meetings.
- **On paper: Print** gives an agenda or a month grid.

Questions: hello@immcase.com.