Appointments

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An appointment is a general term for an event that is scheduled in the diary, and occurs at a specific point in time for a set duration. An appointment may be a meeting between parties, but it could also be time allocated to making a phone call, or generating a report.

Tasks

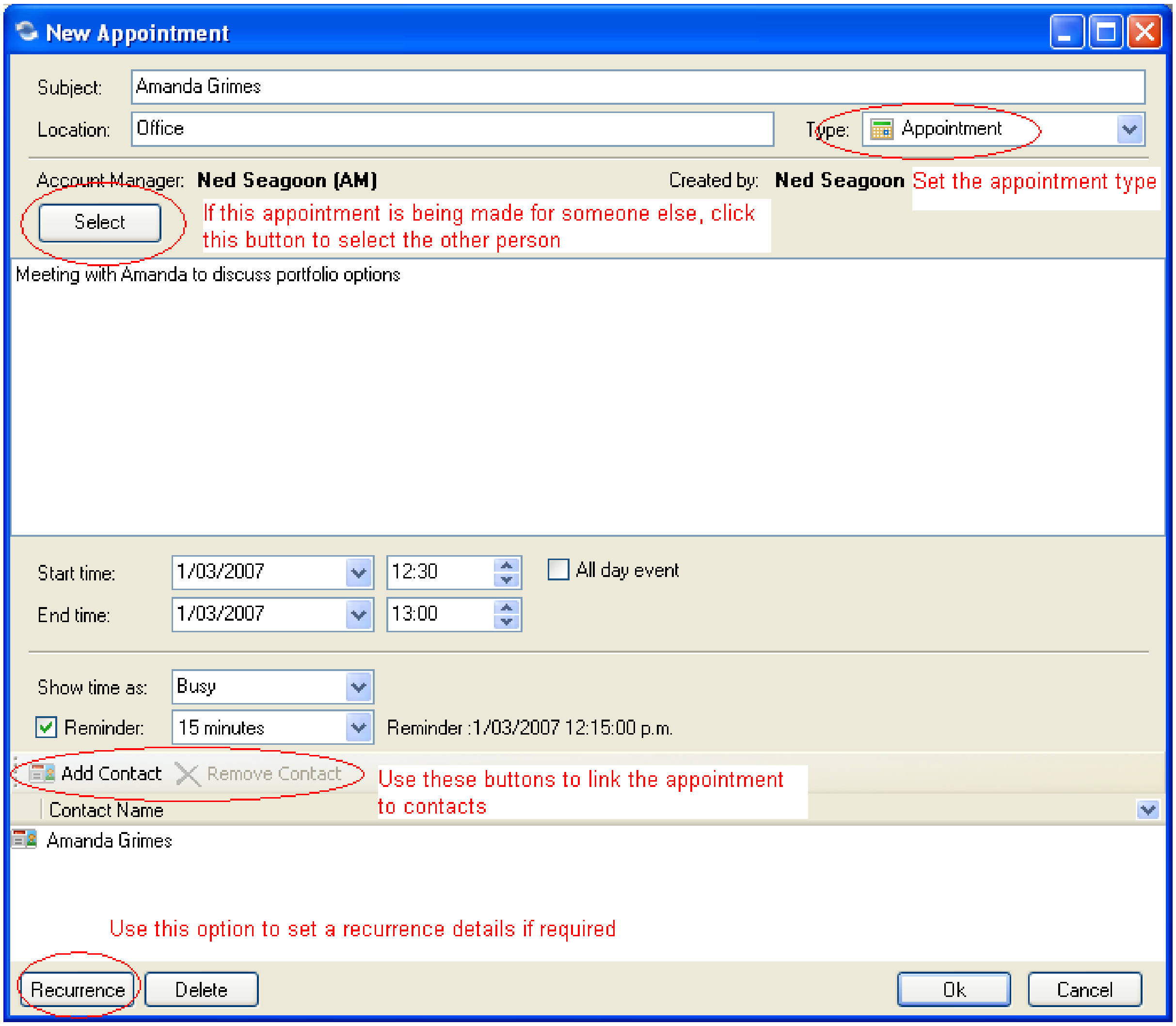
Tasks are 'To Do' items that are to be completed by a particular date (and optionally, time) but can be undertaken at any time prior to that completion date. Tasks are scheduled using the task list rather than the diary.

Creating an A ointment

Appointments can be linked to contacts when they are created. The appointment will be filed against the selected contacts, and will appear in the activity list for each contact.

An a ointment can be created in one of the following ways:

- right click on a contact, either in the treeview on the left or in contact list grid on the right, and select 'Appointment' from the pop up menu.
- if contact details are displayed, click on the 'Appointment' button beside their name at the top of the screen.
- select multiple contacts by checking the box beside their name in the contact list grid. Then either right click on one of the selected contacts and select 'Appointment' from the pop up menu or click on the 'Action' button at the top of the grid and choose 'Appointment'.
- double click in the diary time slot where you wish to make the appointment.
- click and drag over a selected time period for the appointment. Releasing the mouse brings up the New Appointment screen for the selected time period.
- right click a diary time slot and select 'New Event'.
- double click on a selected day for the appointment on the calendar summary.
- click on the meeting button in the Calendar toolbar.



Subject	Text entered will appear as the diary entry for this appointment.
Location	This is where the appointment, meeting, etc. is being held.
Ty e	Choose the type of appointment from the drop down list. The corresponding icon will be displayed beside the diary entry.
Account Manager	If the appointment is being made for another account manager, clicking on the 'Select' button will bring up a list of account managers to select from.
Details	Enter further details about the appointment, if required. After the meeting you can enter further details regarding the outcome of the meeting. A scroll bar will be automatically added if a large amount of text is entered. Alternatively, a Note can be created to record the result of a meeting.

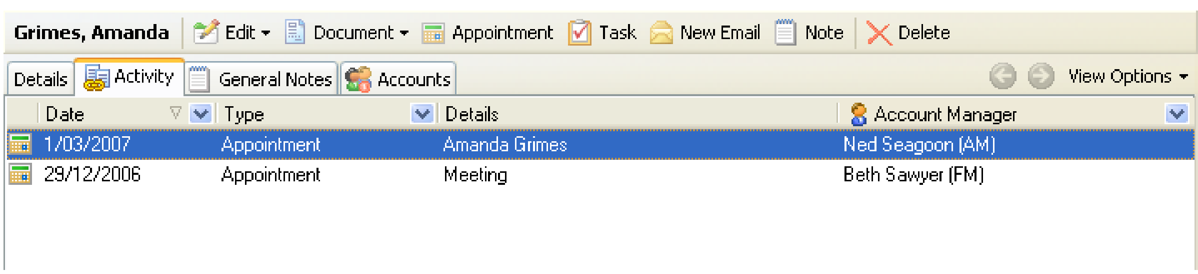
Start/End time Adjust the timing of the appointment, if necessary.
Clicking on the arrow beside the date displays a calendar. Click on the required day to select that date. Date can be set to today's date by clicking the 'Today' button.
Time can be entered manually or adjusted using the up and down arrows.

All day event Checking this box will show the appointment as the primary diary entry for the selected day.

Show time as Choose the time designation from the drop down list. This controls the background colour of the diary entry which enables you to quickly see, for example, when you are busy or out of the office.

Reminder Check this box to create a reminder for this appointment. Select how long before the appointment you would like to receive a reminder. A pop up reminder will be displayed at the selected time. See Reminders for further details on using appointment reminders.

Add Contact If the appointment was created by first selecting a contact or contacts, the name of the contacts will be shown. Other contacts associated with this appointment can be added by clicking this button. See Linking Appointments to Contacts (below) for more details. The appointment will be filed against the contact and shown in their activity list.



Remove Contact Click this button to remove a selected contact from the list of linked contacts. The appointment will no longer be filed against this contact

Recurrence If this appointment occurs more than once, it can be entered in the diary at the required interval by clicking this button. See Recurring Events for details on setting up recurring appointments.

Delete Click this button to delete the appointment from the diary. A confirmation dialog is displayed. Click Yes to delete the appointment.

Linking A ointments to Contacts

Appointments can be linked to contacts by using the 'Add Contact' button when creating or editing an appointment. An appointment can be linked to any number of contacts. Once linked, the appointment will be shown in the activity list for the contact. Filing appointments and tasks against relevant contacts, along with documents, notes and emails, provides a comprehensive record of dealings with each contact.

If the appointment was created by first selecting a contact or contacts, the names of the contacts will be shown in the list at the bottom of the Appointment screen. If the appointment was created directly from the Calendar, no contact names will be shown. Contacts associated with this appointment can be added, or removed, using the buttons above the list of contact names.

To add an a ointment to a contact's activity list:

- Click on the 'Add Contact' button on the Appointment screen. The 'Find Contact' screen is displayed.
- If the contact belongs to another account manager, uncheck the 'My Contacts Only' box.
- Enter all or part of the contact's first name in the box, and click the 'Search' button.
- A list of contacts matching the search criteria will be displayed.
- Double click on the appropriate contact to select them, or alternatively click on a contact and then click Ok.
- When the appointment is created, it will scheduled in the diary and added to the activity list for the contact.

To remove an a ointment from a contact's activity list:

- Select the contact from the list of contacts on the Appointment screen.
- Click the 'Remove Contact' button.
- Click Ok to confirm the deletion.

The appointment is deleted from the activity list for the contact, but the appointment is still shown in the Calendar.

Deleting an Appointment will remove the appointment from the Calendar and delete it from the activity lists of any contacts it has been filed against.

Editing A ointments

Once an appointment has been created, its details, including its scheduled date and time, can be changed at any time.

An existing a ointment can be edited in one of the following ways:

- Double click on the appointment in the diary.
- Right click on the appointment and select 'Open'.
- Double click on the appointment in a selected contact's activity list

The appointment details are shown and can be changed as required.

Moving an Appointment to a different day or time

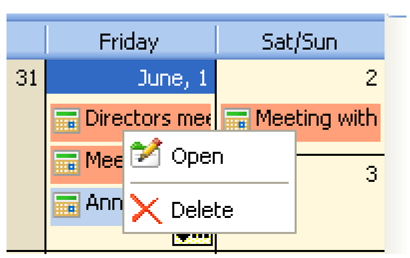
The time or date of an appointment may be altered. To do this, select the original appointment and enter the new date or time. Once changed, the appointment will be moved to the new time slot in the diary.

Deleting A ointments

Appointments, once they have been attended to, can be left in the diary. If an appointment has been canceled, it can be deleted from the diary.

An a ointment can be deleted in one of the following ways:

- Right click on the selected appointment and select 'Delete'.



- Click the 'Delete' button at the bottom of the Edit Appointment screen.

A confirmation screen containing a description of the appointment to be deleted is displayed. Click Yes to delete the appointment. The deleted appointment will be removed from the activity list of any contact if has been filed against.