

Calendar

A key function of Fort CRM is to manage both your contacts and your time. The Fort Calendar manages your diary, appointments and tasks. Appointments and tasks can be linked to contacts so that you can see what the future plans are for any person by viewing these items on the respective tab.

The Calendar contains a daily view, two-monthly calendar summary, and task list.

The screenshot displays the Fort CRM Calendar interface. At the top, there is a toolbar with options: Work Week, Day, Week, Month, Summary, Go To Today, Go To Date, Meeting, Show Key, Resources, and Print. The main area shows a daily view for 'Ned Seagoon (AM)' from Monday, 26 Feb to Friday, 2 Mar. The time slots range from 8:00 AM to 7:00 PM. Appointments are shown as colored blocks: 'Alan' (orange) on Tuesday, 'Amanda Gi' (green) on Thursday, and 'Drinks!' (orange) on Friday. A red circle highlights the 8:00 AM slot, with a note: 'Indicates appointments before 8am Use scrollbar to view.' Another red circle highlights the dates 26, 27, and 28 in the calendar summary, with a note: 'Bold indicates appointments on these days'. The calendar summary shows February and March 2007. The task list on the right includes: 'Email Quantance's about t' (28/12/2006 4:00:21), 'To Do: Investors Meeting' (1/12/2006 4:00:49 p), 'To Do: Company Model Pri' (20/11/2006 4:00:57), 'To Do: Sign up for new Pa' (20/11/2006 4:00:47), 'To Do: ING Golf day - Pres' (20/11/2006 4:00:01), 'To Do: Sent Follow Up emi' (14/12/2006 4:00:24), and 'To Do: Meet with John an' (20/11/2006 4:00:30).

Calendar Summary

The calendar summary on the top right of the screen shows two complete calendar months, and is used as a fast way of moving between dates in the diary. Days on which appointments have been scheduled are shown in bold type.

Clicking anywhere in the calendar summary displays the selected day, week or month, depending on the format of the current diary view. Right click and select 'Go To Today' to return to the current day.

Use the arrows next to the month names to scroll backward or forward through the months on the calendar. The current day is highlighted by a box outline. The day or week currently being viewed in the diary is also highlighted.

Clicking on the month name in the calendar summary displays a list of three months prior to and three months following the current month. Hold down the left mouse button and scroll through the list to highlight the required month. Release the mouse button to display the selected month.

Diary View

Moving around the Forté CRM diary is quick and easy. The diary can be displayed in several formats—Work Week, Day, Week, Month and Summary. Each diary view options explained below.

Scheduled Appointments and Tasks

Scheduled appointments are shown in the appropriate time slot in the diary. Appointments are colour coded to show the time designation (busy, out of office, etc.) and are marked with an icon showing the appointment type. For a list of appointment types and time designations, click on the 'Show Key' button on the calendar toolbar. The key is displayed on the bottom right of the screen.

Linking Appointments to Contacts

Appointments can be linked to contacts so that they appear in the contact's activity list. The activity list is a history of all interaction with the contact. See Appointments for details on linking appointments to contacts.

Reminders

When an appointment or task is set up in the diary, a reminder can be scheduled to pop up on the screen at a set time beforehand. See Reminders for details on how to set up reminders.

Moving between dates in the diary

The summary calendar on the top right of the screen is used to move quickly between dates in the diary. Click on the required date to display it in the currently selected diary view format.

Go To Today

Click on the 'Go To Today' button to display the current day. The cursor is positioned at the diary entry for the current day and the current date is highlighted in the calendar summary.

The current day can also be accessed quickly by right clicking anywhere in the diary view or calendar summary and selecting the 'Go To Today' option.

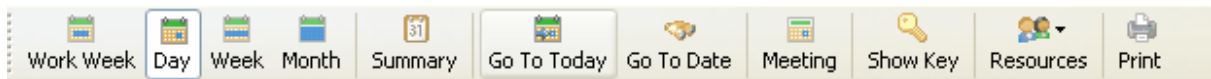
Go To Date

Click on the 'Go To Date' button and enter a specific date to display the selected day. Dates are entered in the format day/month/year (dd/mm/yyyy). Note that if the full date is being entered, slashes are automatically inserted and only the last two digits of the year are required.

A specific date can also be accessed by right clicking anywhere in the diary view or calendar summary, selecting the 'Go To Date' option and entering the required date.

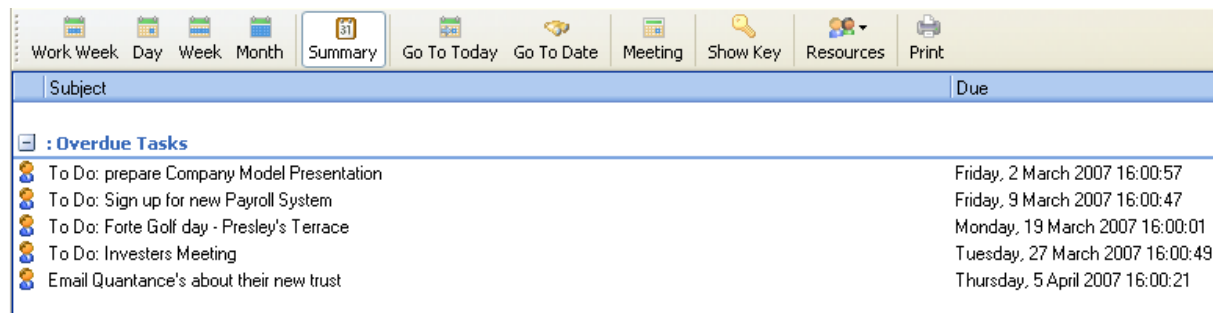
Diary Views

The diary can be displayed in several formats. Clicking a button on the calendar toolbar will change the diary view.



Diary Summary

Clicking on the 'Summary' button shows the diary in summary format. This consists of a list of appointments and tasks scheduled for the next 7 days, along with any overdue appointments and tasks. Details in each of the sections can be hidden or shown by clicking on the '-' and '+' buttons.



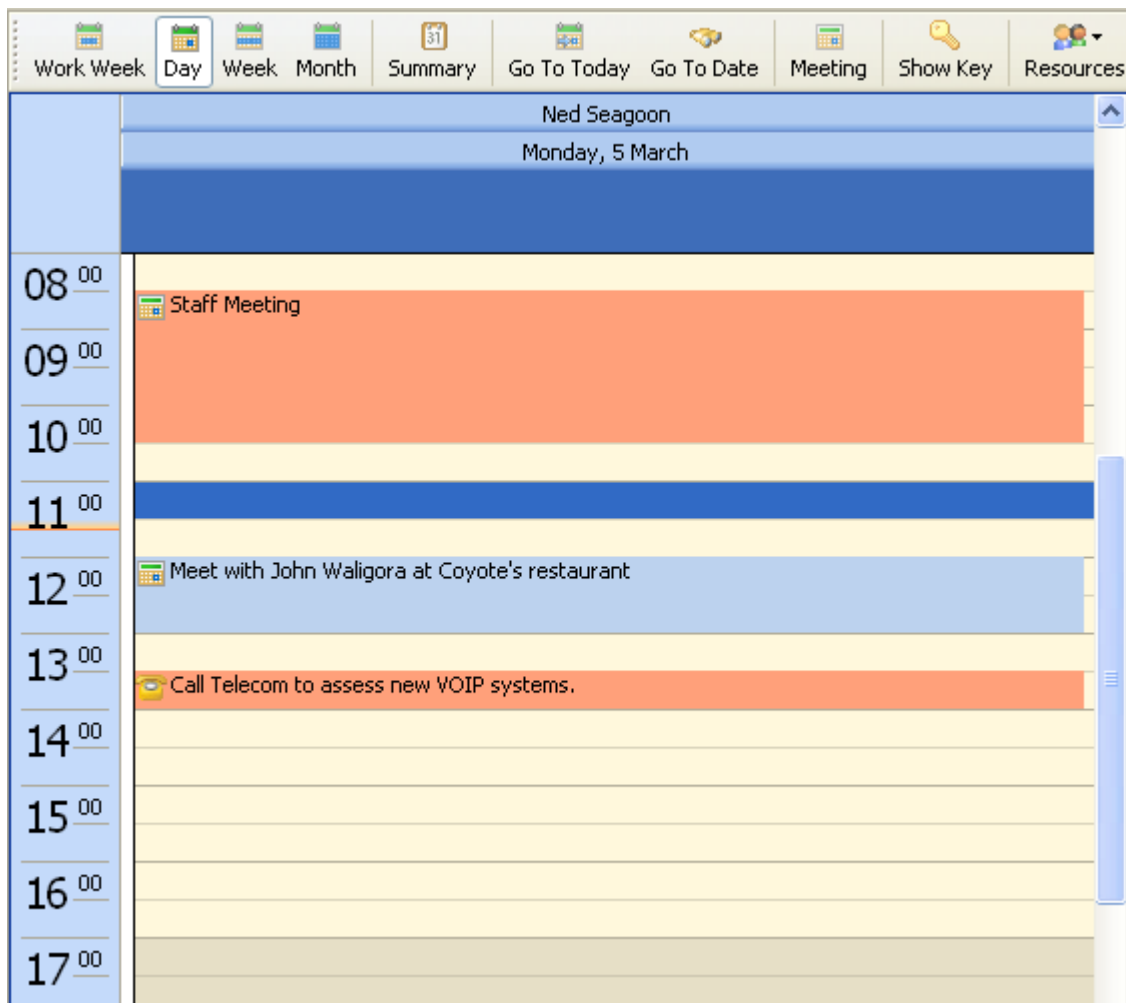
Day

The 'Day' display view displays the selected day in half hourly time slots.

The default display begins at 8am. To access time slots between midnight and 8am, scroll up using the scroll bar on the right hand side of the display. Scroll down to access time slots later in the evening.

Standard working hours of 8am to 5pm have a lighter background colour. This quickly identifies appointments scheduled outside these hours.

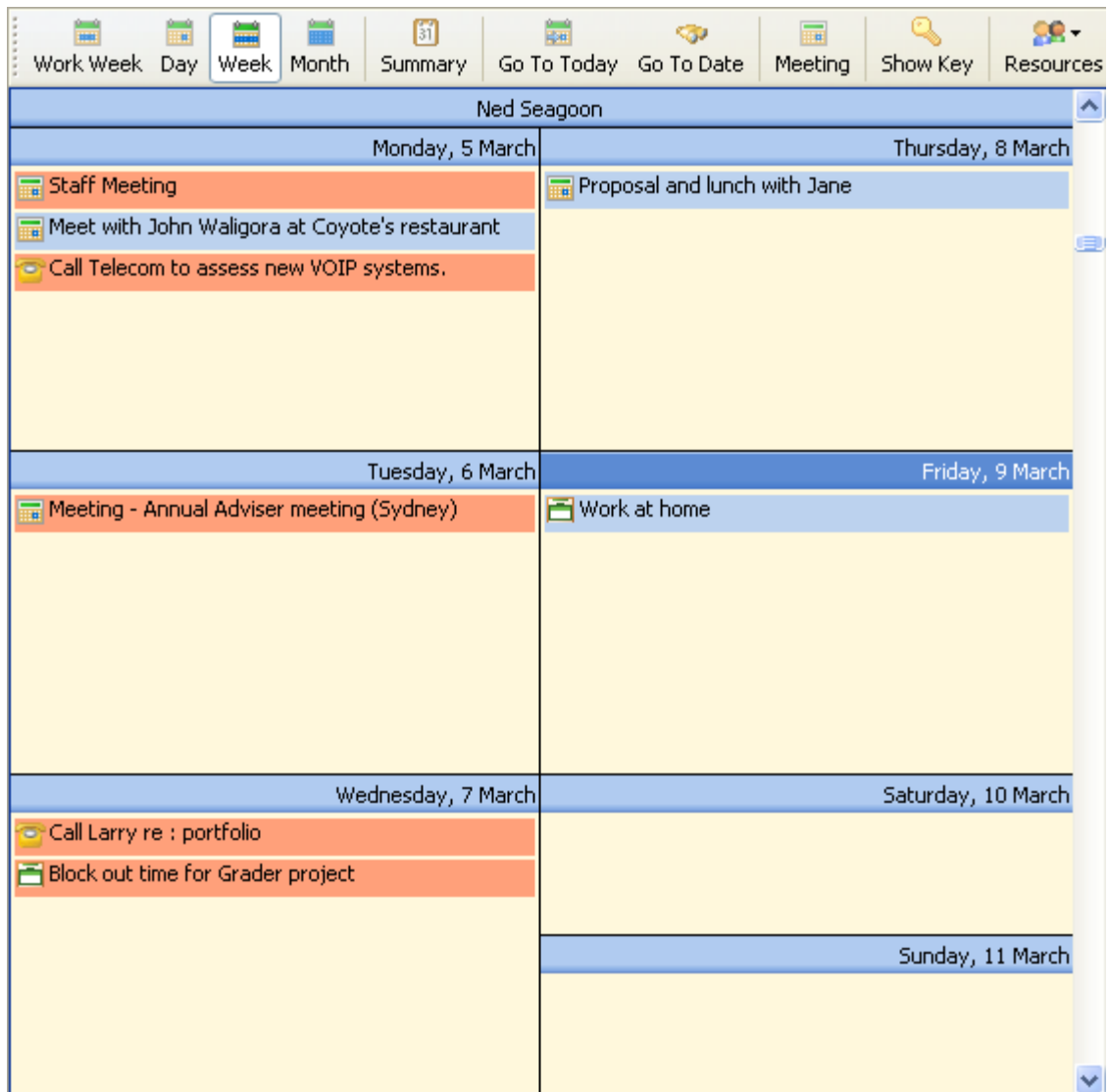
The current time is indicated by a horizontal line within the time markings on the left of the screen.



Week

The 'Week' d ary v ew d splay Monday to Sunday of the selected week.

Cl ck on the blue up arrow at the top of the scroll bar to d splay the prev ous week. Cl ck on the blue down arrow at the bottom of the scroll bar to d splay the follow ng week. The scroll bar slider can be used to qu ckly scroll through the d ary n weekly format.



Month

The 'Month' d ary v ew d splay the selected calendar month.

Cl ck on the blue up arrow at the top of the scroll bar to d splay the prev ous month. Cl ck on the blue down arrow at the bottom of the scroll bar to d splay the follow ng month. The scroll bar sl der can be used to qu ckly scroll through the d ary n monthly format.



Work Week

The 'Work Week' view displays Monday to Friday of the selected week in half hourly time slots.

The default display begins at 8am. To access time slots between midnight and 8am, scroll upwards using the scroll bar on the right hand side of the display. Scroll down to access time slots later in the evening.

Standard working hours of 8am to 5pm have a lighter background colour. This quickly identifies appointments scheduled outside these hours. The current time is indicated by a horizontal line within the time markings on the left of the screen.

