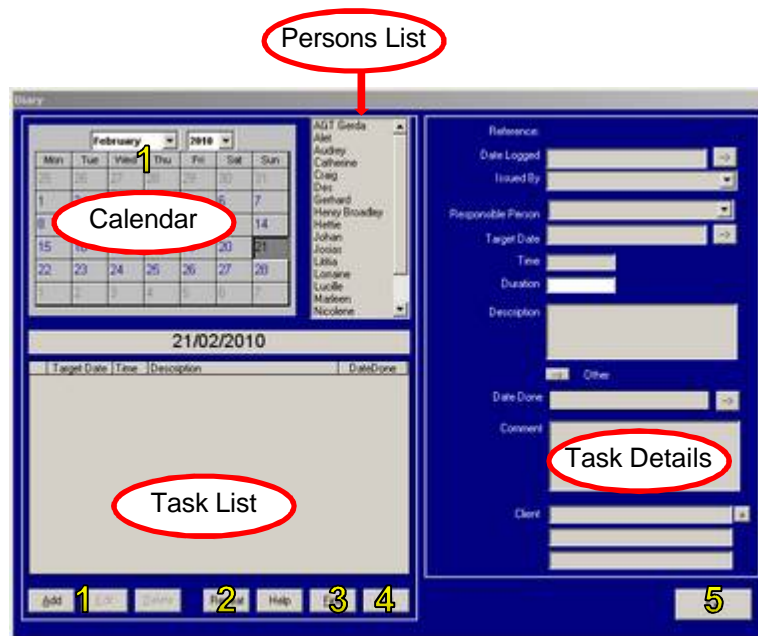


# DIARY – Schedule tasks



**As long as there are one or more outstanding items on a day, the square on that day will stay red. Once all items are completed, the square will change to black.**



- 🕒 Completion of an item is indicated by entering a date in the Date Done field.
- 🕒 Click on a day in the calendar, all instructions or appointments or reminders for that day is displayed in the grid below (Task List).
- 🕒 Click on a person in the “Persons List”, all appointments or reminders for that person is displayed.



## 1 Adding Instructions or appointments

- 🕒 To add an appointment or a reminder, double-click on the day the action must happen in the calendar.
- 🕒 If you click on add appointment you have to change the target (action) date.

The frame on the right is cleared and you can enter information.





Reference:

Date Logged  -->

Issued By

Responsible Person

Target Date  -->

Time

Duration

Description

--> Support

Date Done  -->

Comment

Client

Date Logged  -->

- 👉 The system puts the current date in this field.
- 👉 Click on the button next to the date to change this date.

Issued By

- 👉 Click on the drop-down box and select the person who is issuing this instruction / appointment / reminder.

Responsible Person

- 👉 Click on the drop-down box and select the person responsible for this appointment.

Target Date  -->

- 👉 The system puts the date on which you double-clicked in this field.
- 👉 You can click on the button next to the date to change this date.

Time

Duration

- 👉 Enter the time, if desired, in this field. Note that, like displayed on the screen when you enter this field, the format is 24 hour format, e.g. 14:30.





Description

Type instruction, reminder or appointment detail.

Date Done  -->

Once this appointment is taken care of, click on the button next to the date field and select the completion date from the calendar.

Comment

Capture detail of comment regarding completion of instruction.

Client

If this record regards an existing client, click on the drop-down box and select the client.

*The contact person and contact numbers of this client will be printed on the reports.*

**Note that new clients can't be added here.**

Click on "Save" to save the information.

2 Click on the "Repeat" button in order to repeat a selected appointment. Select whether the appointment needs to be repeated on a "Weekday" or a specific "Date".

3 Click on "Find". Enter Word or Phrase to search for. This search will look for any word or phrase that was entered in the "Description" or "Comment" fields.

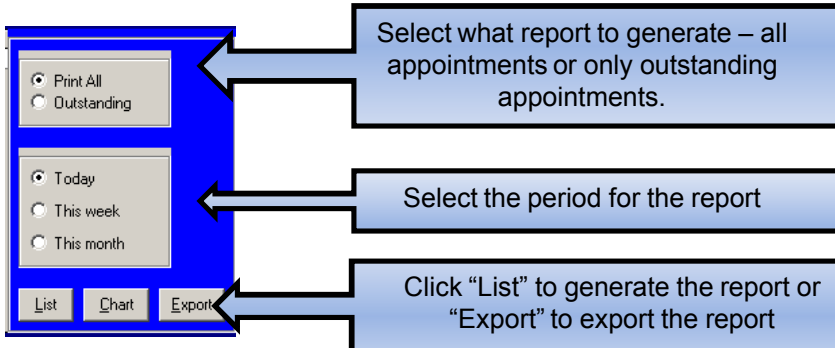
**eZee**

Enter the word or phrase to search for:





- 4 The “List” button generates a report on all appointments and the status on the appointments. The information can also be exported.



The “Chart” button is sales staff related and an advanced feature. This gets handled in advanced training if required.

- 5 Click on “Exit” to exit to the software’s main screen.

