

## Daily Scheduling

| Procedure/Function  | Where Accomplished                          | How Accomplished  |
|---|---|---|
| Planning Actions for a Particular Day (non-time sensitive)                  | Daily Planner                               | Access Daily Planner and single click on the To Dos tab. Select the desired day for the Action with a single click on the correct calendar day. Add a new to do with a single click on the ADD button. Key in the text of the To Do to state what action should be accomplished. Attach the To Do to a record in AGENCY EXPERT through the search arrow displayed at the bottom of the screen. Notes may also be attached to the To Do after it has been saved by striking the TAB key.   |
| Planning Appointments for a Particular Day (time sensitive)                 | Daily Planner                               | Access Daily Planner and single click on the Appointments tab. Select the desired day for the Appointment with a single click on the correct calendar day. Add a new Appointment with a single click on the ADD button. Key in the text of the Appointment to state what the appointment it regarding and/or who it is with. Attach the Appointment to a record in AGENCY EXPERT through the search arrow displayed at the bottom of the screen. Notes and/or alarms may also be attached to the To Do after it has been saved by striking the TAB key. You may also display the expected duration of the appointment (see manual). |
| Attaching Notes to Appointments or To Dos                                   | Daily Planner                               | Highlight the desired appointment or to do with a single click. Single click on the NOTE icon found on your tool bar. Enter in your desired note text then save your note.  |
| Automatic Attachment of Appointments and/or To Dos to AGENCY EXPERT records | Daily Planner and Any other Tracking Module | Access the record to which you wish to attach an appointment or to do item. Once the desired record is displayed, single click on the Daily Planner   |
| Setting Alarms as Reminders   | Daily Planner Appointments Tab              | Access Appointments tab of the Daily Planner and highlight the desired appointment with a single click. Once highlighted, single click the ALARMS button then enter the time you wish for the alarm to notify you of the upcoming event.  |
| Viewing your Week- or Month-at-a-Glance                                     | Daily Planner                               | From the Daily Planner, single click on a day of the desired week (for Week-at-a-glance) or display the correct month (for Month-at-a-glance) then single click the Week- or Month-at-a-Glance button. The correct screen will be displayed.  |
| Entering a Response Date for a Note   | Notes for Any Record in AGENCY EXPERT       | Access NOTES from the record to which you wish to attach a response item or action. Add a new note and enter the desired note text. Single click on the Response Note box then enter the date you wish to have an action entered for this note. The date you enter will allow AGENCY EXPERT to automatically place an action in the Daily Planner To Do list for that note on the specified date.   |