

Working with the Diary/Tasks

Date – the date field can either be set to **Today** (all tasks due today or overdue) or to **All** (to see all outstanding tasks including those due in the future)

Click on any of the column headings to sort the data into ascending or descending order

Open Product – this button opens the product in order to view full details.

Open Task – this button opens the task to be updated avoiding the need to navigate through the Client or Product area

Tasks are colour coded depending on the Priority of the task that has been set

Print List – opens the Diary/Task list in Excel to enable further analysis of data to be undertaken

Delete Task – Allows task to be deleted (subject to users permissions)

Open Client – this button will open the Fact Find for the client

DateDue	Priority	Description	Assigned To	Client	Provider	CustRef	Type
01/07/2009 10:26	Normal	Completed	G West	Jones	Accord	16703	Mortgage
01/07/2009 14:04	High	Ring client to arra...	G West	Jones		16703	
02/06/2009 12:40	Normal	Exchanged	G West	Jones	Alliance & Leicester	16703	Mortgage
06/07/2009 12:42	Low	Documents Scan...	G West	Ball	Abbey Life	16708	Insurance