

Working with the Diary/Tasks

Date – the date field defaults to **Today** (all tasks due today or overdue). Other filters are available to review other date ranges e.g. Tomorrow, the next 7/14 days, next month or All

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

The screenshot shows the 'Administration - Tasks' window in 'The Key v3.6.22 (KC0000)'. The sidebar on the left has 'Diary/Tasks' selected. The main area shows a filter for 'Assigned To' (G Blackbum) and 'Date' (Today). Below the filters, it says 'Diary tasks search results : 52 task(s) found. [Click here to customise results.](#)'

Date Due	Priority	Description	Assigned To	Client	Provider	Cust Ref	Type
08/05/2011	Normal	Contact client for review	G Blackbum	Band		17152	
07/05/2011	High	Chase client for proof of income	G Blackbum	Daniels	Fumess BS	17115	Mortgage
29/04/2011	Low	Received by Lender	G Blackbum	Six	Advantage Home Lo...	17047	Mortgage
29/04/2011	Normal	Enter Product Expiry	G Blackbum	Six	Advantage Home Lo...	17047	Mortgage
29/04/2011	Normal	Application with Administrator	G Blackbum	Six	Advantage Home Lo...	17047	Mortgage
24/04/2011	Normal	Enter Product Expiry	G Blackbum	Six	Nationwide BS	17047	Mortgage
24/04/2011	Normal	Application with Administrator	G Blackbum	Six	Nationwide BS	17047	Mortgage
24/04/2011	Normal	Received by Lender	G Blackbum	Six	Nationwide BS	17047	Mortgage
16/04/2011	Normal	Completed	G Blackbum	Six	Handlesbanken	17047	Mortgage
16/04/2011	Normal	Application with Administrator	G Blackbum	Six	Handlesbanken	17047	Mortgage
16/04/2011	Normal	Valuation Instructed	G Blackbum	Six	Beverley BS	17047	Mortgage
16/04/2011	Normal	Completed	G Blackbum	Six		17047	Mortgage
16/04/2011	Normal	Application with Administrator	G Blackbum	Six		17047	Mortgage
15/04/2011	Normal	Valuation Instructed	G Blackbum	Six	Advantage Home Lo...	17047	Mortgage
15/04/2011	Normal	Normal Acceptance	G Blackbum	Six	Scottish Provident	17047	Insurance
30/03/2011	Normal	1 month	G Blackbum	3420		16997	Insurance
24/03/2011	Normal	Seen in Site office	G Blackbum	Williams		17096	Insurance
20/03/2011	Normal	Information O/S	G Blackbum	Six	Pinnacle Insurance Plc	17047	Insurance
19/03/2011	Normal	Documents Scanned	G Blackbum	Six	Nationwide BS	17047	Mortgage