

Calendar and Task Manager Overview

Under the Schedule Tab inside WorkCenter you have both your Calendar and Task Manager. For more details on using both of these, view the additional flash videos and review the WorkCenter 2.0 Quick Start guide.

The WorkCenter Calendar has the same look and feel of Outlook with the advanced operation needed for the mortgage industry. To access your WorkCenter Calendar features, click on the SCHEDULE TAB located at the top center of your WorkCenter Screen.

You can quickly change the viewing of your calendar from today to 3 days, a week, month or year view by selecting the pre-programmed icons at the top of your screen view. If you wish to see multiple weeks, left click on a day while holding down your mouse and dragging it over the weeks you wish to view on the calendar in the upper right hand corner of your screen.

There are 3 basic ways to schedule contacts on the Calendar. The easiest way is to simply click and drag the person from the Contact List on the Left to the time on the Calendar you wish to schedule them. When you release the mouse, you will have a pop up box appear with several options for the meeting or follow-up type. A few of them include Appointment, Phone Call, Task, or Letter. Next to each of these options will be another sub-menu with specific selections under each heading. Once you have found the one you want, click on it and it will open up a dialogue box to add notes, change the time, or even change the color on the Calendar. When you are finished and have it set up the way you want, simply click on the OK button. If you do not see the specific option you desire, select one and then modify the subject message box to meet your needs.

Once back on the Calendar screen you can move the scheduled appointment for that contact to a different time by clicking and dragging them to another time on the Calendar. WorkCenter will then activate the scheduled items with the new time and date based on your change.

The second way to schedule a contact is to click on their name in the list and click on the SCHEDULE AN APPOINTMENT icon button located at the top of the screen. Select the time on the appointment box to meet your scheduled calendar preference and click OK. You can also create a schedule item not linked to a contact by double clicking in one of the days in the calendar. When the pop up box appears, modify to meet your needs and then click the OK button.

The third way to schedule a contact is to right click on their name in the list and mouse over Appointment, Phone Call, Task, or Letter. Then click on the specific item you want. Modify the pop up box to meet your desired day and time and then click the OK button.

When you schedule a calendar item for a specific contact you will be able to open their contact record by clicking on the subject link inside the calendar box. You can also see all scheduled appointments for a specific contact by opening that contact and clicking on the Schedule Tab located at the top of the contact record box.

TASK MANAGER: view the flash video: **“Schedule - #4 Using the Task Manager”** for easy use of the Task Manager inside WorkCenter.

For additional information about these functions or other features inside WorkCenter, view the additional flash videos, read the WorkCenter Quick Start Reference Guide and watch for the next upcoming WEBnR coaching and training sessions.