

Using Mark-It Advantage Xi

Calendar Basics & Task Series

Mark-It Systems, Inc.

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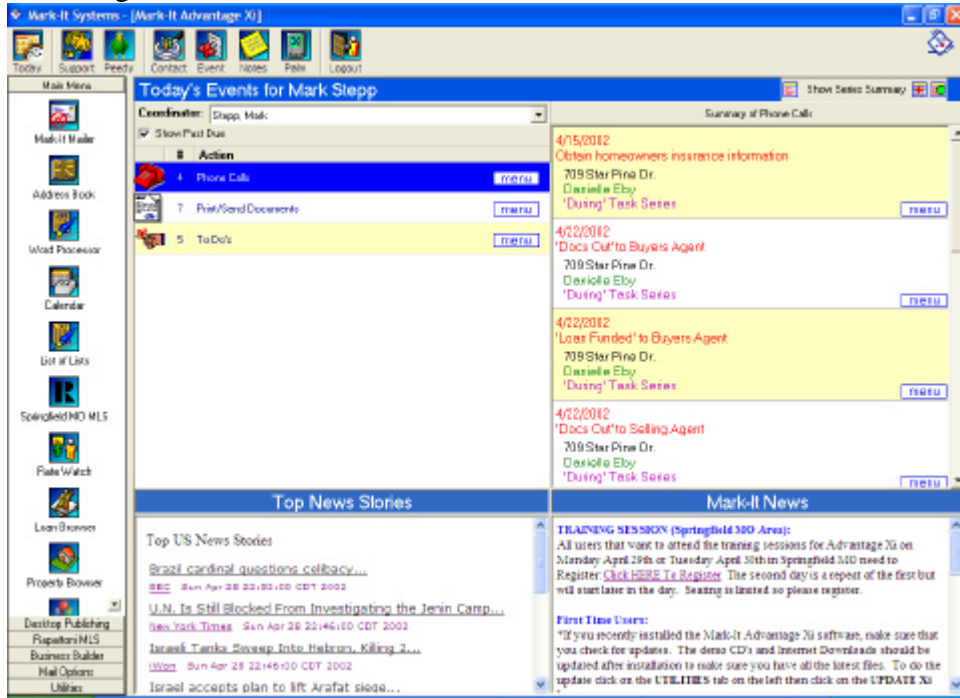
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- What is Today's Events?
 - Today's Events gives you a summary view of event in your calendar for the day. Each user in the system can be assigned events which will be displayed when first entering Mark-It Advantage Xi.



- How do I use the Today's Events Screen

The purpose of this screen is to give you a summary of the events in your calendar for the day and allow you to deal with them when you first come into the system. The screen is divided into 2 sections – the left side shows an action summary and the right side shows the quick pick details for the listed actions.

- Action Summary

- Action Count – shows the number of items in the specified action type

#	Action
4	Phone Calls

- Popup Menu – allows you to Process, Complete, Delete all events for this action

[menu](#)

- Action Detail

- Quick Click Access – allows you to click on an area of the screen to see more detail for the events

- Event Detail – Clicking on the Date / Description to see the event detail. This will show you the complete event and allow for date changes or other modifications as needed.

4/15/2002
Obtain homeowners insurance information

- Property Information – Click on the property address to display the Property record for the selected event.

709 Star Pine Dr.

- Contact Information – Click on the contact name to display the contact record for the selected person in the event.

Danielle Eby

- Series Information – click on the series name to see a list of all events in this series generation. This will be a list of all events that were started for this contact and transaction.

'During' Task Series

- Popup Menu – Allows you to Process, Complete or Delete each event individually.

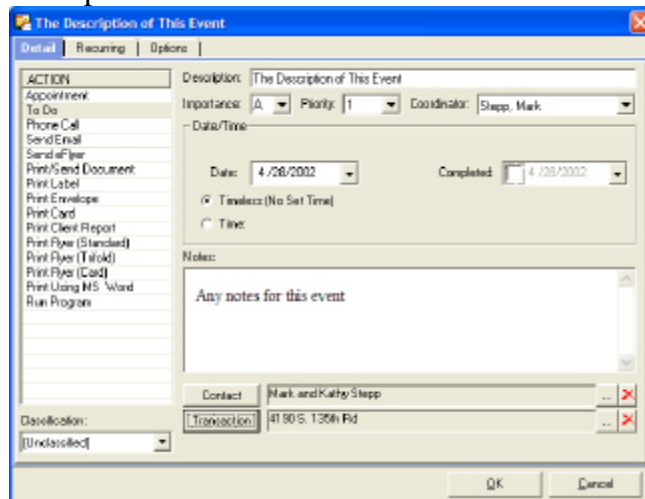
[menu](#)

- How do I add an event from the Today's Event Screen?

Click on the  button on the Today's event screen to add a new event to the calendar

- What information do I need to enter when adding an event?

- When adding an event to the calendar you will be required to add the following:
 - Action
 - Description
 - Date
 - Document if required by Action
- Linking information if appropriate
 - Contact name – if an event should be tied to a contact then click on the contact button and select/add a name in the database
 - Transaction – if an event should be tied to a transaction then click on the transaction button and select/add an address in the database
- All other information is optional

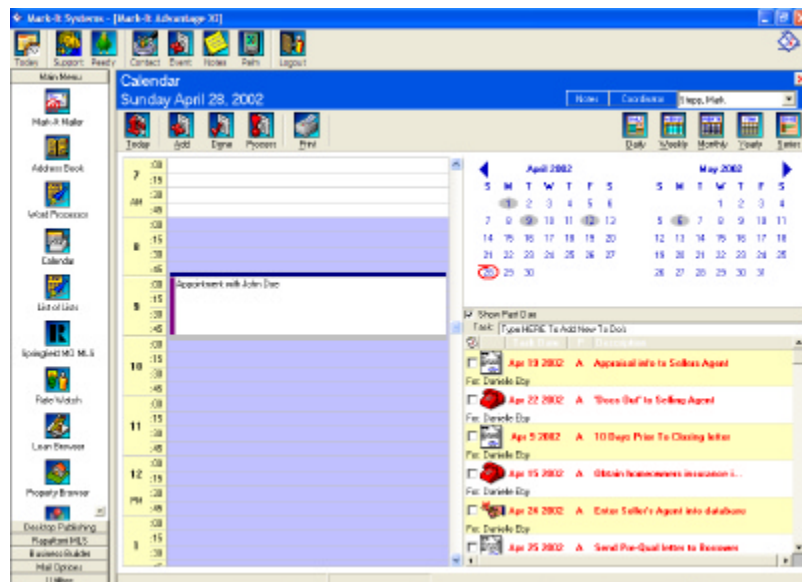


- How do I see my calendar?

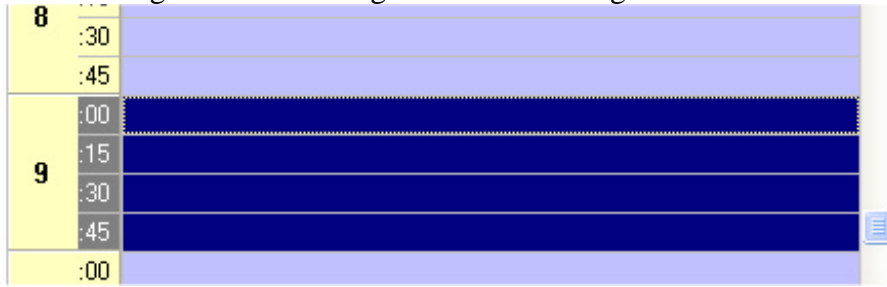
- Click on the Calendar Icon to display the calendar module



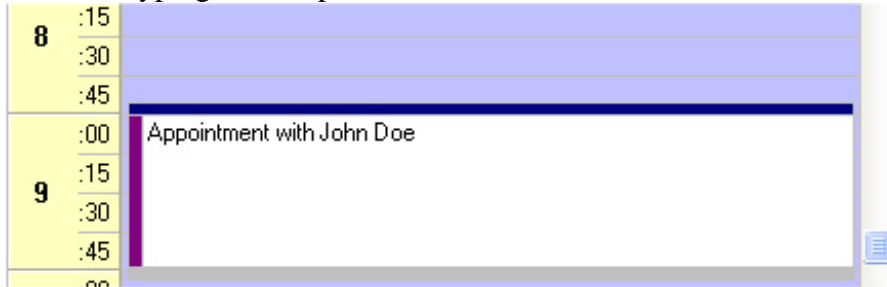
Calendar



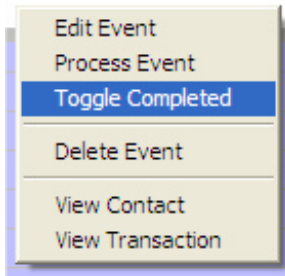
- How do I add an appointment using the time bar?
 - Click and drag from the starting time to the ending time



- Then start typing a description for the event



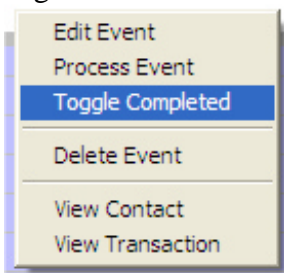
- How do I complete an appointment?
 - Right-click on the event and choose Toggle Complete



- How do I edit an existing appointment?
 - Right-click on the event and choose Edit Event or double click on the event
- How do I add a To Do item without a time associated to it?
 - Enter the description of the to do item in the quick add box then press enter.

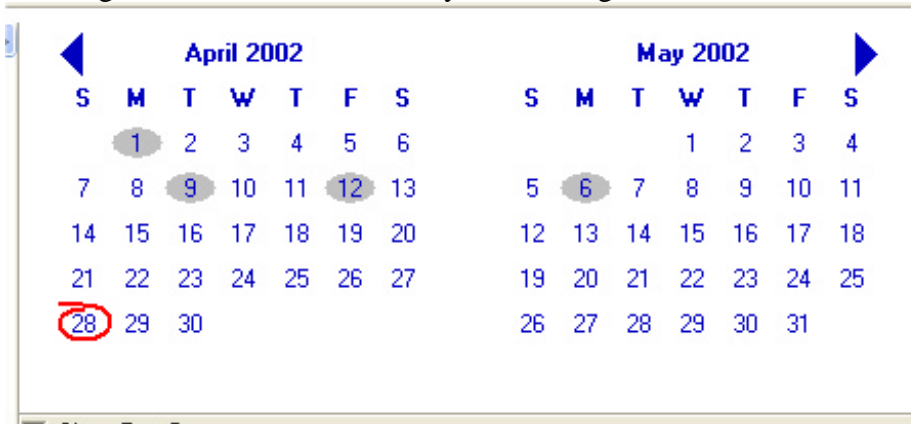


- How do I edit an existing To Do?
 - Right-click on the event and choose Edit Event or double click on the event
- How do I complete an Event?
 - Right-click on the event and choose Toggle Complete

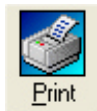


- How do I process an Event?
 - Right-click on the event and choose Toggle Complete
- What is the difference between completing an Event and Processing an Event?
 - If an event is a "Print/Send Document" event then the Process Event will print the document before completing it. The Toggle Completed method only marks it as complete it does not actually print the document.
- How do I delete an event?
 - Right-click on the event and choose Delete Event

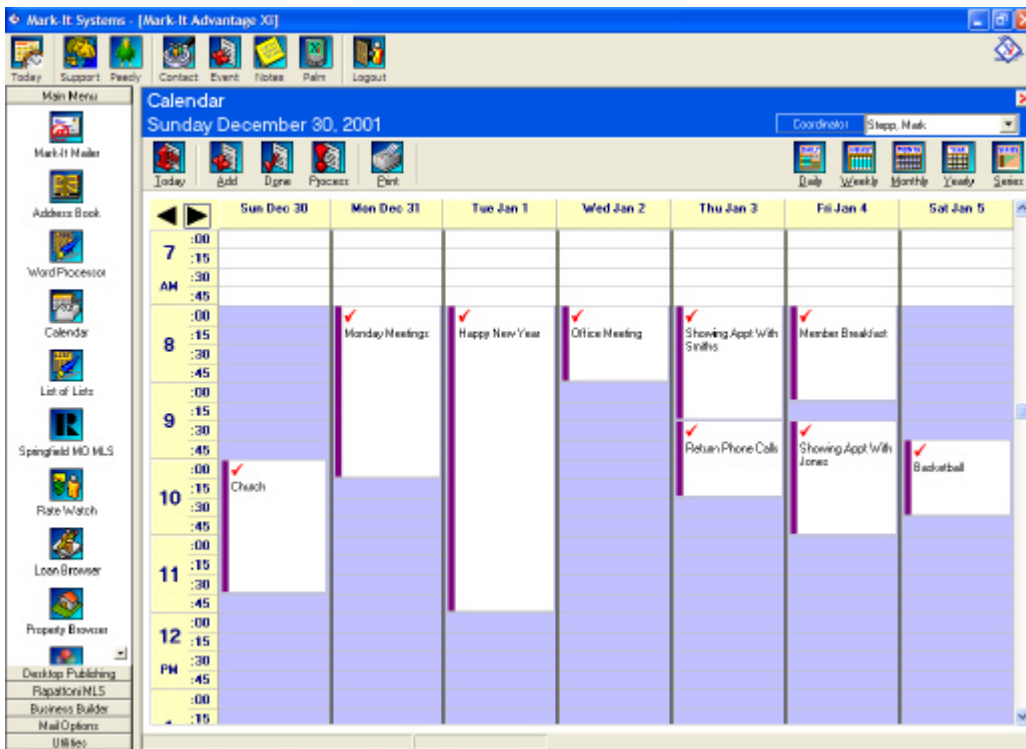
- How do I select a different day to view?
 - Clicking on one of the calendar days will change the current date:



- How can I print my events for the day?
 - Click on the Print button – this will print 2 pages – one for the appointments and one for the todo's



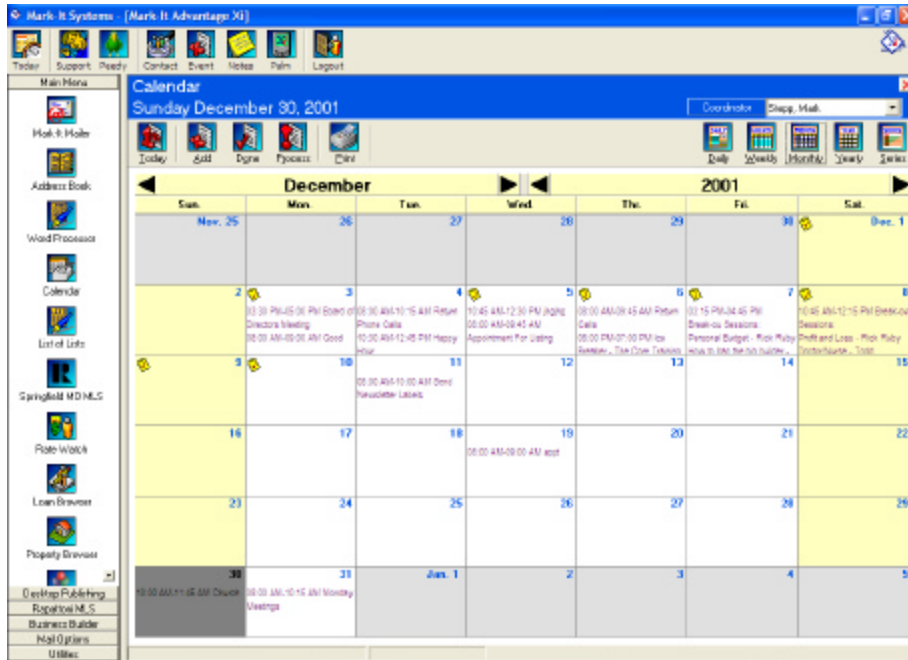
- How can I view my appointments for the week?
 - Click on the weekly view to see appointments for the week



Events can be added from this view...

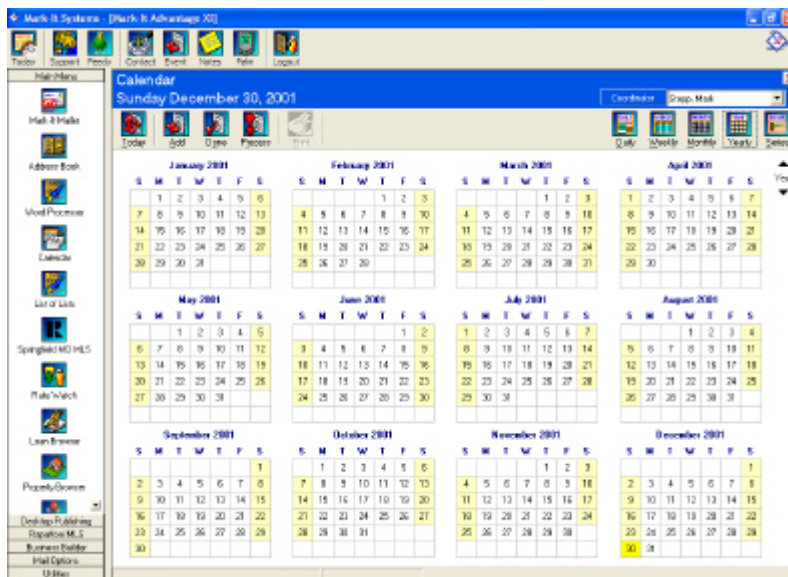
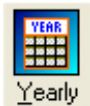
Pressing the Print button now, will cause the system to print a weekly appointment report.

- How can I view my Monthly Calendar?
 - Click on the monthly view button



Clicking on the Print button will print the entire month.

- How can I view my Yearly Calendar?
 - Click on the yearly view button



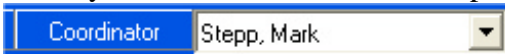
- How can I see my current list of series?
 - click on the Series button to get a list of all active series



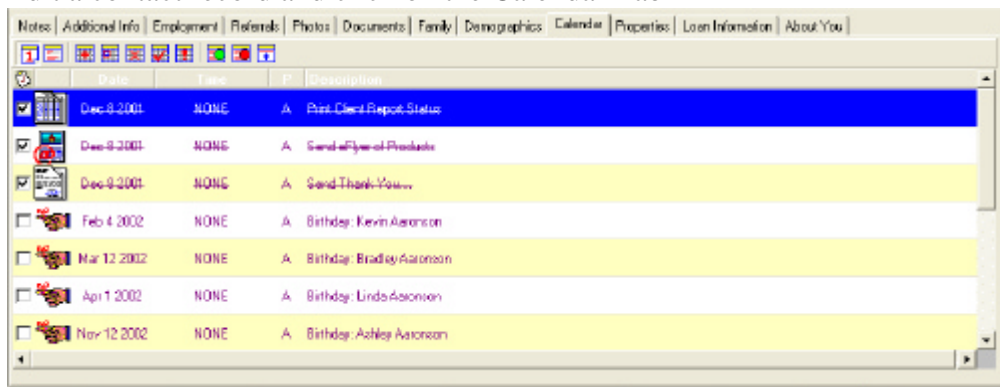
- How to I quickly view today's calendar?
 - Click on the today button to the left of the add button



- How can I view another users calendar?
 - Select your coordinator form the dropdown list in the upper right corner



- How can I view a contacts calendar?
 - Edit a contact record and click on the Calendar Tab



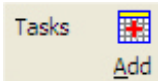
- Enter the 'Layout' into the computer
 - Click on the New Series button to add the new series and give it a name.



Then press OK

- Select the New Series (New Listing) from the dropdown list

- Click on the Task Add button for each task in the series

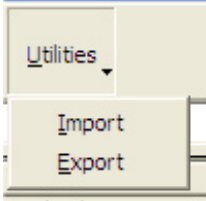


- Enter the event information just as if it were an actual event in your calendar

In the Date/Time section you must specify the number of days, weeks, months, years from a specific date that this event will take place. In this example we will send a Thank You Letter to the contact 0 (zero) days from the List Date – Zero days means that it will happen on the same day as the list date. You can use +/- numbers to indicate if the event happens a number of days before or after a specific date.

Then Press the OK button to add this event to the task series and repeat for each event.

- Exporting a Series
 - Once a series is designed, you can export it to give to others. Simply click on Utilities > Export from the task series setup screen



- Importing a Series
 - To import a previously exported series simply click Utilities > Import from the Task Series Setup screen

- How do I Start a series?
 - Click on the Start Series Button on the Today Page



- Select the series to start

Select Series:

- Select the default contact for the series

Contact

- Select a transaction for the series (if needed)

Transaction

- Verify the starting date(s) and make changes as needed

List Date:

- Select additional party members as needed

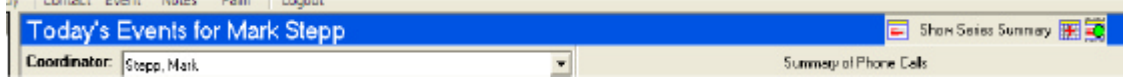
Party Member Type	Contact Name

- Click on Start this Series

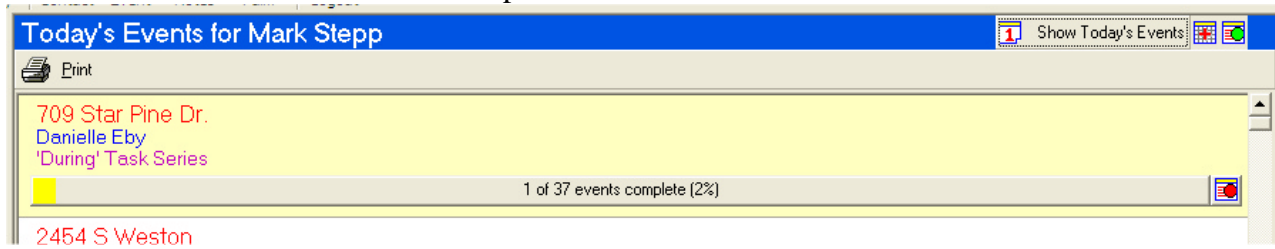


- Click OK when finished

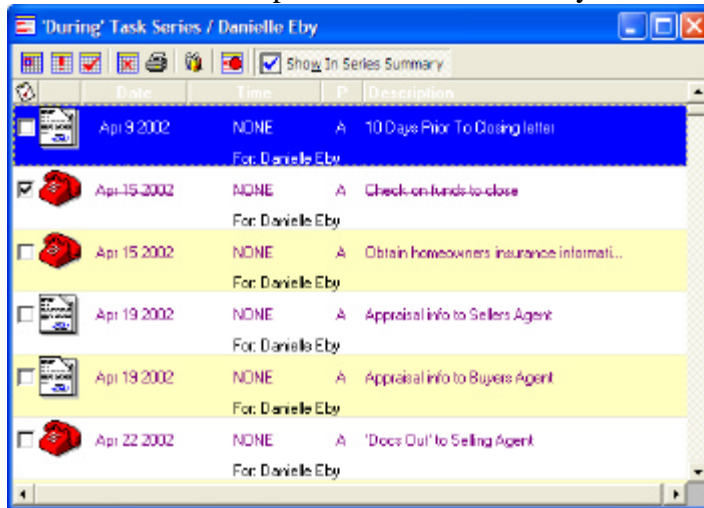
- How can I see my series summary?
Click on show series summary in the upper right corner



This will show all the current series in process



- How can I print my series summary?
 - Click on the printer Icon in the Series List above
- How do I stop an existing series from the today page?
 - Click on the RED button on the right side of the graph to delete any non-completed events
- How can I view a specific series?
 - Click on the Bar Graph in the series summary to see the specific series



Notes: