intelligence Cheat Sheet: Dairy & To Do List

Intelligence Diary and To Do List operates within Intelligence only.
There is no integration with your email account calendar.

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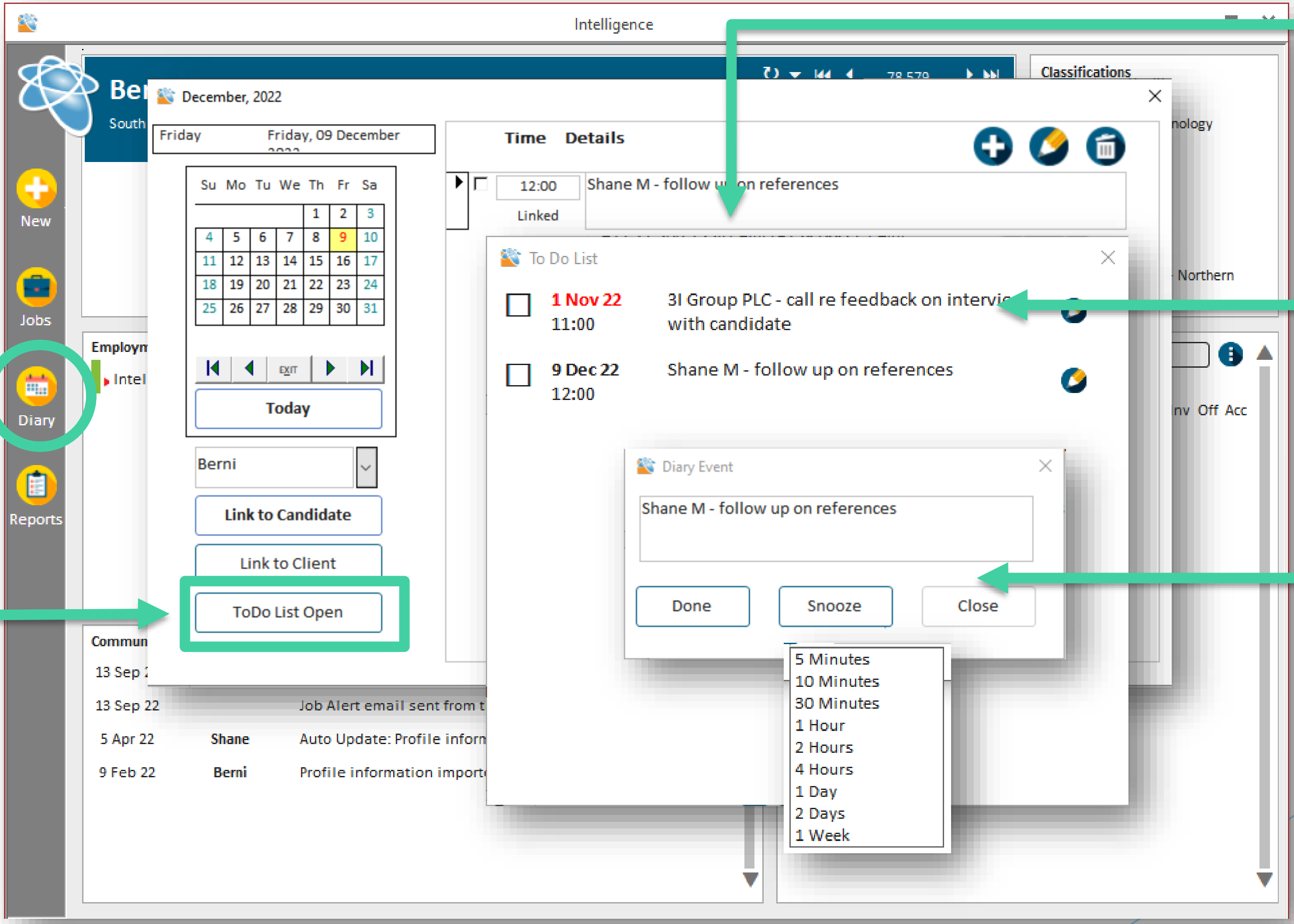
Enable your To Do List

Tip: The ToDo list floats on top of the Candidate or Client screen, so you can move it to another screen or to the side of your Intelligence window.

1. Select the Diary icon on the left-hand side vertical menu to open your diary.

2. Click on the button “Open ToDo List” to enable your ToDo List.

The ToDo List will now open every time you start Intelligence.



3. Your ToDo list shows all outstanding items.

If an event is outstanding, the date is displayed in RED.

4. Double-click on the entry to navigate quickly to that record.

5. You can edit an event by clicking on the Pencil (Edit) icon.

6. You will see an alert pop up if you have added a time to the event.

You can mark this event as:

- Done – this will close the event and hide it from your ToDo List
- Snooze it for various time periods
- Close it – this will keep the event displayed on your ToDo List and highlight it in RED as an outstanding event.

Tip: If you don’t wish to display the ToDo List, just click on the button “ToDo List Open” to disable it.

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Add an event from Diary

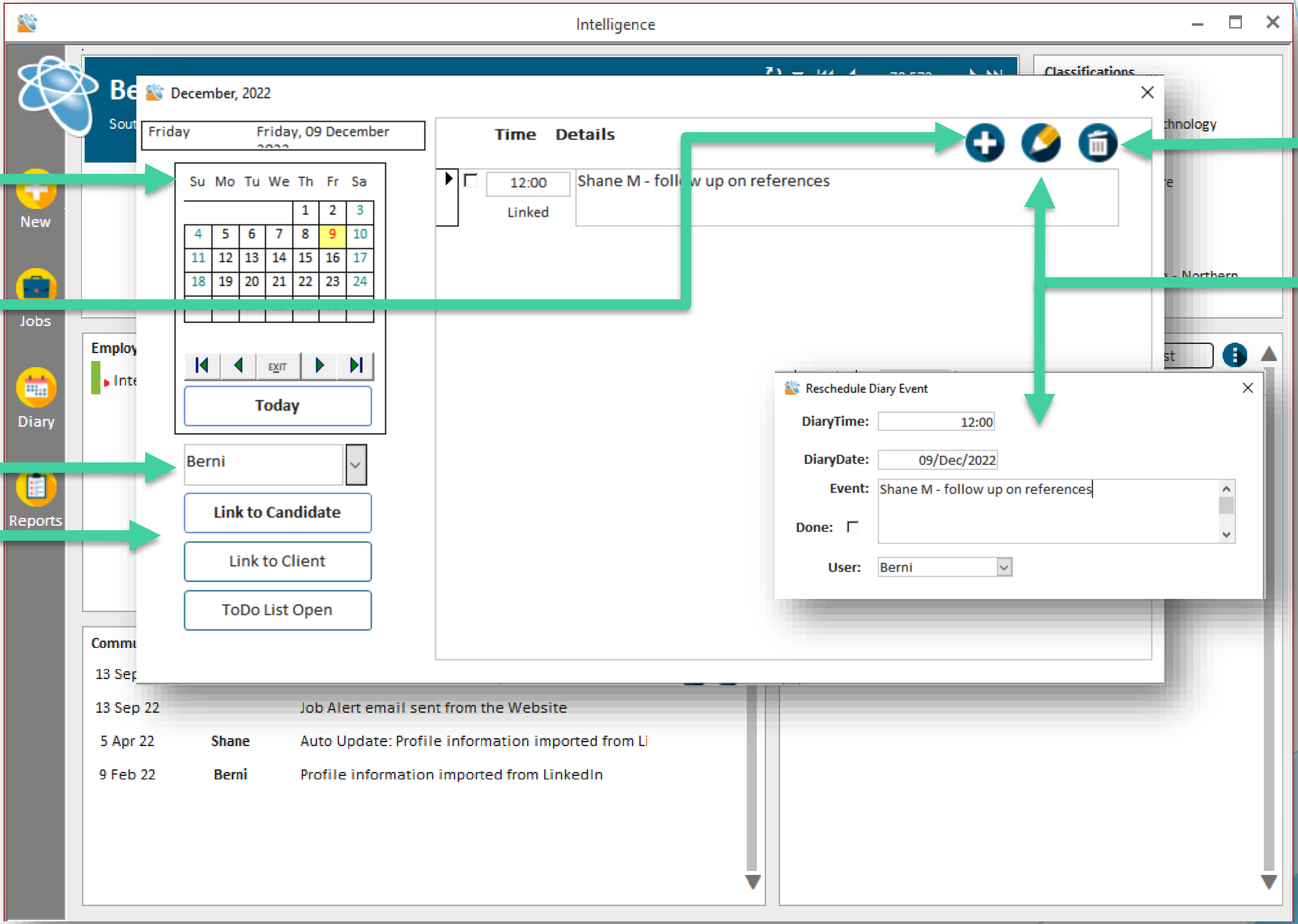
1. Select the date you need from the calendar.

2. Click on the Plus (Add) icon to add a new event.

3. Your username is selected by default, but you can select another username to assign the diary event to that person.

Note that the diary event will display on the selected person's Diary and ToDo List, not yours.

3. Link the diary event to the CURRENT candidate or client. The current candidate or client is the profile that is visible.



5. Deleted the selected item from your diary.

6. Select the Pencil (Edit) icon to edit the diary entry.

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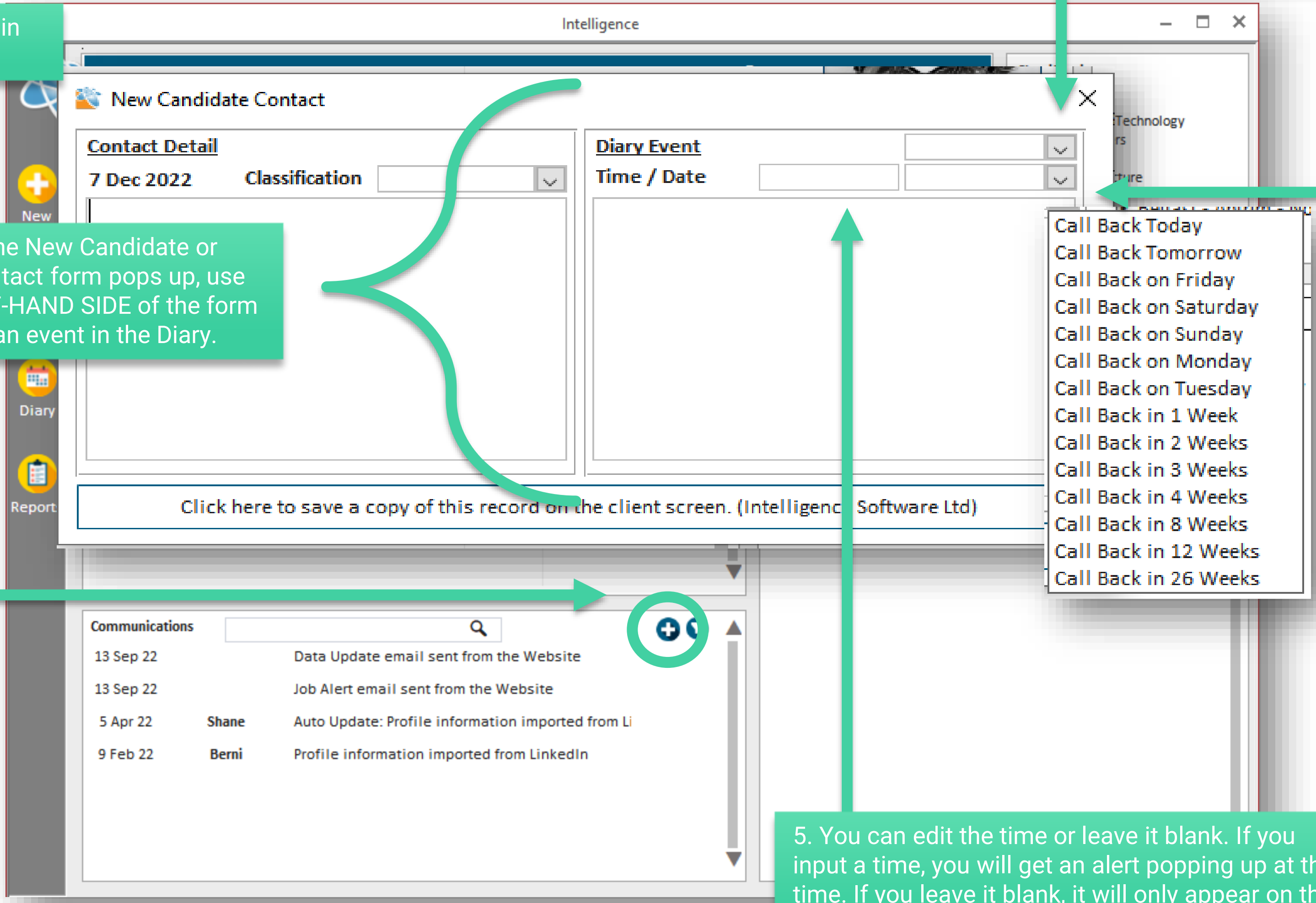
Add an event from Communications

1. Click on the Plus (Add) icon in the Communication section.

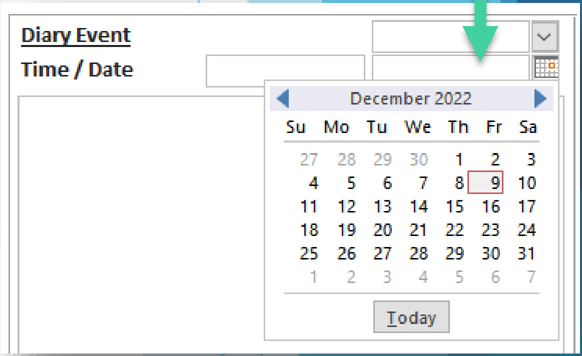
2. When the New Candidate or Client Contact form pops up, use the RIGHT-HAND SIDE of the form to create an event in the Diary.



3. Click on the top drop-down option to set an event for another user, or leave it blank to set an event for yourself.

4. Click on the bottom drop-down option to select a pre-defined time period.

You can also click into the date field to select a specific date using the calendar.



5. You can edit the time or leave it blank. If you input a time, you will get an alert popping up at that time. If you leave it blank, it will only appear on the Diary and ToDo List.

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