

User Manual



Calendar



User Manual

There are multiple ways to use the calendar.

List View, Detail View and Calendar View

- From the list view when you are making outbound calls to schedule appointments and not collecting any information. This is the mini-calendar.
- From the contact view where you are collecting notes and scheduling appointments. The mini calendar and/or follow up date can be selected.
- From the calendar view – most useful when you have a list of appointments to add at one time, for example a seminar.

Mini Calendar

Contact Manager

All Contacts | Shared Contacts | **My Contacts** | Unowned

Switch to Compact

93 Results

Event Calendar [Manage Event Calendar Settings](#)

Monday, February 10	Tuesday, February 11	Wednesday, February 12	Thursday, February 13	Friday, February 14
10 +	11 +	12 +	13 +	14 +

Search

Search by Tag

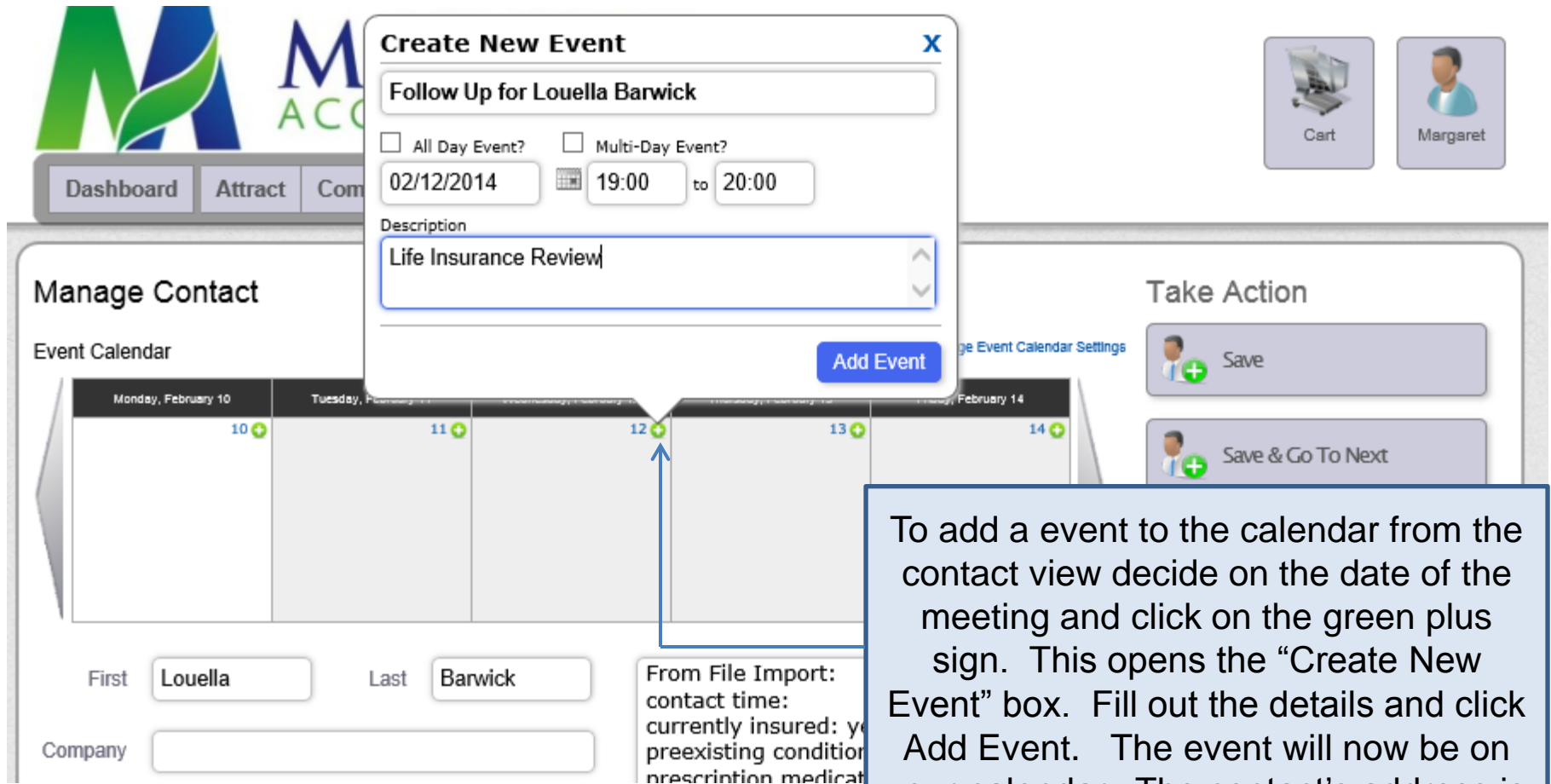
Exclude by Tag

Take Action

<input type="checkbox"/> Temp	First Last	Last Contact	Next Contact	Last Action: Note
	Phone	Last Updated		
	Email	Date Added		
	City Zip	Status : Actions Taken		
	County			
	Louella Barwick 123 Main Street Salt Lake City, UT 84049 louella@testemail.com (435)654-1234 12/16/1955	Never Never 7 months ago		New: Lead imported by Margaret Audet.
	Royce Rochin 27 First Street	Never Never		New: Lead imported from File by Margaret Audet.

The Mini Calendar is located on top of the list view. You can see 5 days at a time. You can click on the arrows before or after the calendar to change the dates displayed.

Adding an Event from Contact View Using Mini Calendar



The screenshot displays the Market Access Direct interface. At the top, there is a navigation bar with 'Dashboard', 'Attract', and 'Com' tabs. A 'Create New Event' modal is open, showing the title 'Follow Up for Louella Barwick', options for 'All Day Event?' and 'Multi-Day Event?', a date of '02/12/2014', and a time range of '19:00 to 20:00'. The description field contains 'Life Insurance Review'. An 'Add Event' button is visible at the bottom right of the modal. Below the modal, a mini calendar shows dates from Monday, February 10 to Friday, February 14. A blue arrow points from the '12' (February 12) on the calendar to the 'Add Event' button. To the right, a 'Take Action' section contains 'Save' and 'Save & Go To Next' buttons. At the bottom, contact information for Louella Barwick is visible, including fields for 'First', 'Last', and 'Company'. A text box at the bottom center contains the following text:

From File Import:
contact time:
currently insured: y
preexisting condition
prescription medicat

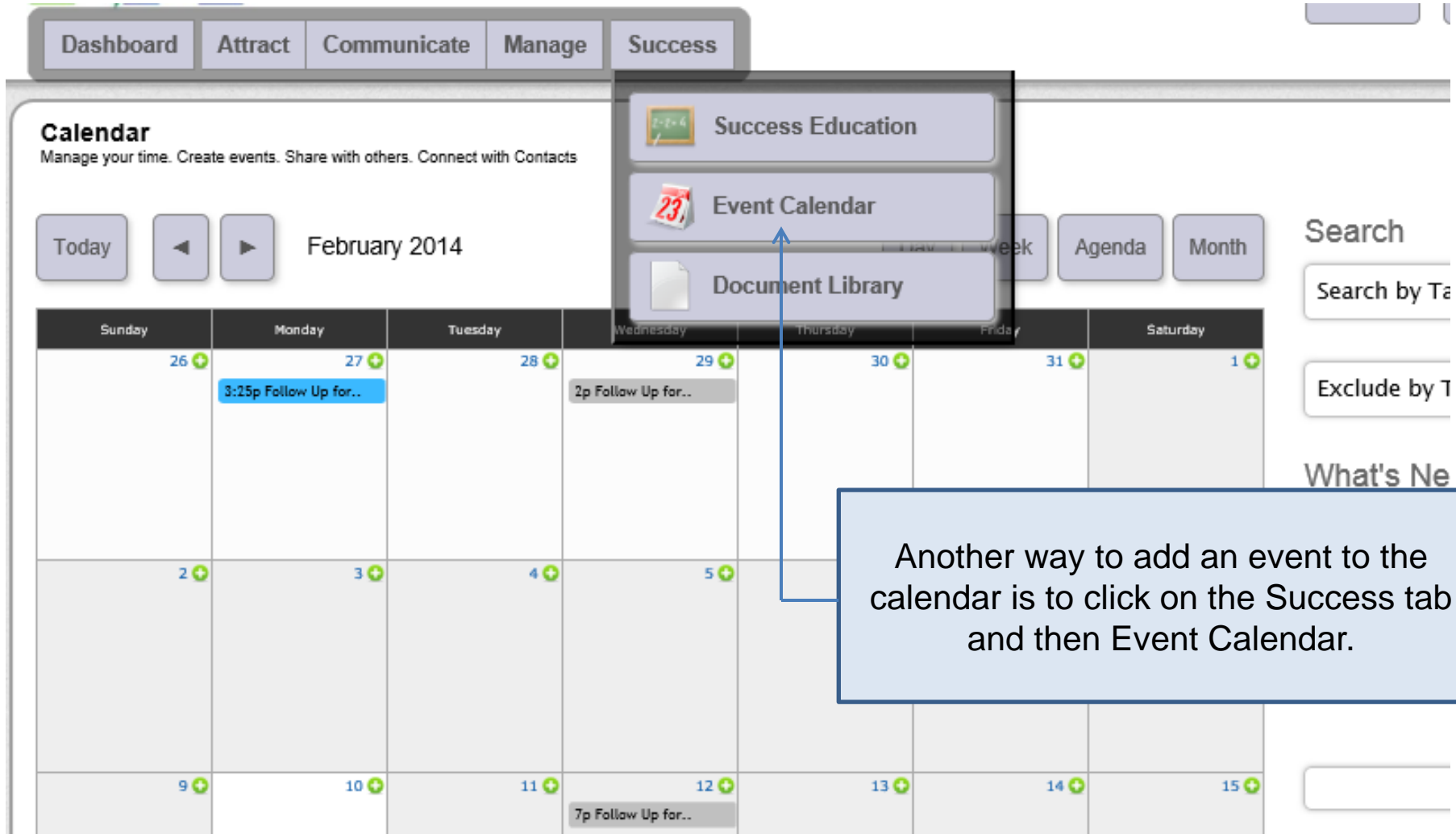
To add a event to the calendar from the contact view decide on the date of the meeting and click on the green plus sign. This opens the “Create New Event” box. Fill out the details and click Add Event. The event will now be on your calendar. The contact’s address is added to the event.

Adding an Event Time Contact View Using Follow-up Field

First	<input type="text" value="Jim"/>	Last	<input type="text" value="Hill"/>	Additional Contact Info	
Company	<input type="text"/>				
Email	<input type="text" value="jim@marketaccessdirect.com"/>				
Phone	<input type="text" value="(856)981-4734"/>				
Mobile	<input type="text"/>				
Address	<input type="text" value="5 Old York Road"/>			Last Contact 3 weeks ago	
	<input type="text"/>			Last Update 3 weeks ago	
City	<input type="text" value="Turnersville"/>	State	<input type="text" value="NJ"/>	Source	<input type="text" value="Manual Entry"/>
Postal	<input type="text" value="08012"/>	Spouse	<input type="text"/>	Owner	<input type="text" value="jimhill"/>
County	<input type="text"/>			Temperature	<input type="text" value="None"/>
	Time Zone <input type="text"/>	Best Contact Time	<input type="text"/>	Type	<input type="text"/>
Birth	<input type="text"/>	Spouse DOB	<input type="text"/>	Status	<input type="text" value="Default"/>
Insurance	<input type="text"/>			Follow Up	<input type="text" value="2014-02-24 14:00:00"/>
Premium\$	<input type="text"/>				<small>Example: tomorrow 3:15 pm</small>
					<input checked="" type="checkbox"/> Add to Calendar
				Tags	<input type="text" value="Add Tag..."/>

When you put in a follow-up date and add to calendar you will get an email the night before the follow-up date.

Adding an Event from the Calendar

A screenshot of the Market Access Direct web application interface. At the top, there is a navigation bar with tabs for 'Dashboard', 'Attract', 'Communicate', 'Manage', and 'Success'. Below this is a 'Calendar' section with the subtext 'Manage your time. Create events. Share with others. Connect with Contacts'. The calendar is set to February 2014. A blue callout box highlights the 'Success Education' tab, and a blue arrow points from it to the 'Event Calendar' tab. Another blue callout box contains the text: 'Another way to add an event to the calendar is to click on the Success tab and then Event Calendar.' The calendar grid shows dates from Sunday 26 to Saturday 1. Some dates have events listed, such as '3:25p Follow Up for..' on Monday 27 and '2p Follow Up for..' on Wednesday 29. There are also green plus signs on many dates, indicating more events are available.

Dashboard Attract Communicate Manage Success

Calendar
Manage your time. Create events. Share with others. Connect with Contacts

Today ◀ ▶ February 2014

Success Education
Event Calendar
Document Library

Search
Search by Ta
Exclude by T
What's Ne

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26 +	27 + 3:25p Follow Up for..	28 +	29 + 2p Follow Up for..	30 +	31 +	1 +
2 +	3 +	4 +	5 +			
9 +	10 +	11 +	12 + 7p Follow Up for..	13 +	14 +	15 +

Filling out the Event Form

Calendar
Manage your time. Create events. Share with others. Connect with Co

Life Review with Bob Jones

All Day Event? Multi-Day Event?

2/10/2014 7:00pm to 8:00pm

2/10/2014

Repeating


Repeats Every: 1 Weeks

On Days: Sun Mon Tue Wed
 Thu Fri Sat

Series Ends:

Summary:

Color



Description

WYSIWYG

Life Review. Has Medicare Policy. Interested in MOO

Fill in event name, date and time

1234 Shady Run, Mt. Laurel, NJ 08054 215-535-6666

Shared Event Allow Shared to Edit

Tom Smith

Tags

Connected Contacts

Bob Jones

Event Privacy

Public Private

Global Event

Yes No

Event Location

Search

Search by Tag

Exclude by Tag

What's Next

You can share this appointment with another agent in your office by inputting their name here. If you want to allow them the ability to edit the event check the box all editing.

By typing in the person you are meeting with it will connect their contact record to this appointment.

Here you can type in any notes about the appointment.

Adding an Event from the Calendar

Life Review with Bob Jones 1234 Shady Run, Mt. Laurel, NJ 08054 215-535-6666

All Day Event? Multi-Day Event?

2/10/2014 7:00pm to 8:00pm

2/10/2014

Repeating


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Series Ends:

Summary:

Color



Description

Shared Event Allow Shared to Edit

Tom Smith

Tags

Connected Contacts

Bob Jones


Event Privacy
 Public Private


Search


Search by Tag

Exclude by Tag

What's Next

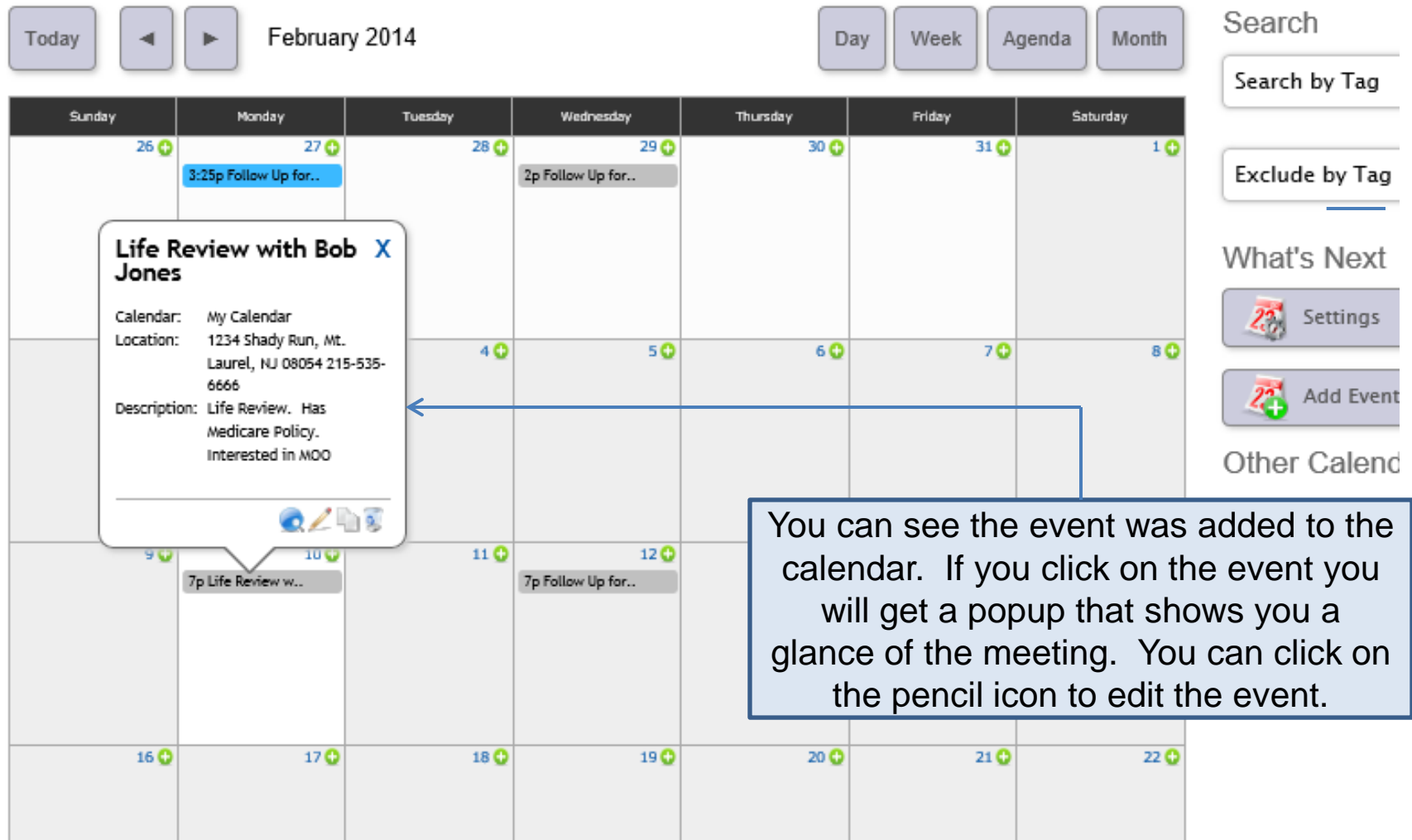
 Settings

 Save

 Cancel

Once you have filled out the event form completely click the save button.

Adding an Event from the Calendar



The screenshot displays a calendar interface for February 2014. At the top, there are navigation buttons for 'Today', left and right arrows, and the month 'February 2014'. To the right are view options: 'Day', 'Week', 'Agenda', and 'Month'. A search bar is located on the far right with the text 'Search by Tag' and 'Exclude by Tag'. Below the search bar are 'What's Next' buttons for 'Settings' and 'Add Event', and a section for 'Other Calendars'. The calendar grid shows days from Sunday to Saturday. A popup window is open over the event 'Life Review with Bob Jones' on Monday, February 27. The popup contains the following information:

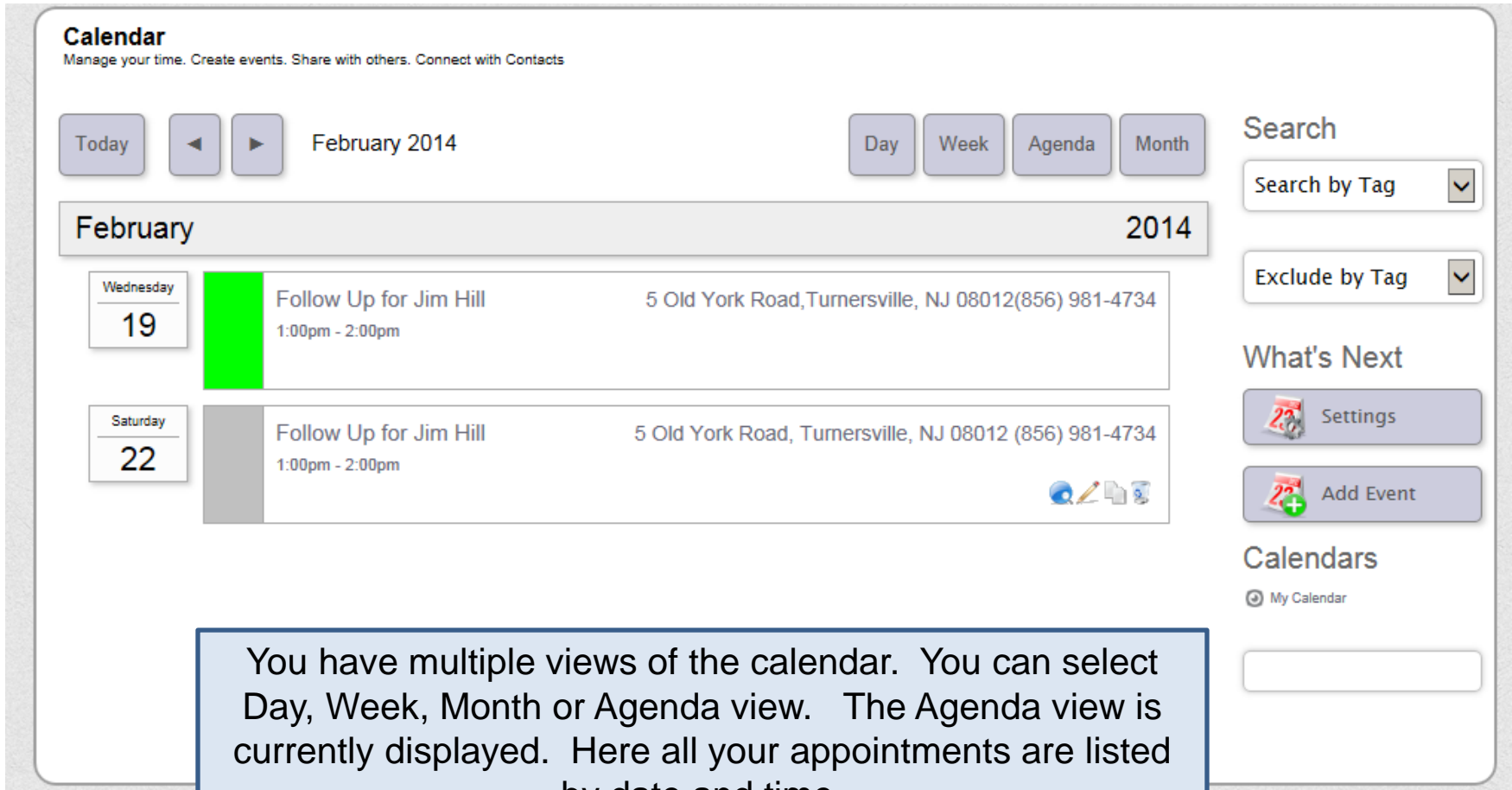
- Life Review with Bob Jones** (with a close 'X' icon)
- Calendar: My Calendar
- Location: 1234 Shady Run, Mt. Laurel, NJ 08054 215-535-6666
- Description: Life Review. Has Medicare Policy. Interested in MOO

At the bottom of the popup are icons for a globe, a pencil (edit), a document (details), and a trash can (delete). A blue arrow points from the 'Add Event' button to the popup. A text box on the right side of the calendar contains the following text:

You can see the event was added to the calendar. If you click on the event you will get a popup that shows you a glance of the meeting. You can click on the pencil icon to edit the event.

Calendar View – Agenda

Click on the Agenda button to view all upcoming calendar events.



Calendar
Manage your time. Create events. Share with others. Connect with Contacts

Today ◀ ▶ February 2014 Day Week **Agenda** Month

February 2014

Wednesday 19	Follow Up for Jim Hill 1:00pm - 2:00pm	5 Old York Road, Turnersville, NJ 08012 (856) 981-4734
Saturday 22	Follow Up for Jim Hill 1:00pm - 2:00pm	5 Old York Road, Turnersville, NJ 08012 (856) 981-4734

Search
Search by Tag
Exclude by Tag

What's Next
Settings
Add Event

Calendars
My Calendar

You have multiple views of the calendar. You can select Day, Week, Month or Agenda view. The Agenda view is currently displayed. Here all your appointments are listed by date and time.