My Calendar Transcript

BisTrack's My Calendar feature is a convenient way to keep track of your follow up tasks and appointments using a Notepad Note. For those using Outlook Integration, Follow up entries can be added to the calendar as well. We begin this course with an overview of the calendar views available and the options for changing the view type and user. Then we will take a look at adding and maintaining Notepad Notes from within a calendar.

Notepad notes with a scheduled follow up and Appointments are automatically added to the calendar of the person specified and to the customer's calendar. To see entries added to your calendar, select My Calendar from the Home tab. By default, it's displayed using the Month view with the current month shown.

The current date is highlighted in Yellow. Follow up notes appear in Blue while appointments are in Red. To move between months, click on the arrow keys beside the date shown. Clicking the left arrow button moves backwards one month at a time and the right arrow moves forward.

In Month view, the calendar items appear with a limited amount of information. Hovering over an entry displays the details allowing you to see what the note is about without having to open it.

If you prefer to see just one day's entries, begin by selecting the date and then set the view to Day. Based on the working days set in System Manager, your open business hours are shown with a white background and closed in blue. The hours are shown down the left side with a yellow line at the current time.

To change the time intervals, right-click anywhere in the calendar. From the pop-up menu select the desired number of minutes. The time is shown using the interval minutes selected. Intervals of 15 minutes or less show more detail for each entry. In Day view, clicking the left or right arrow moves backward or forward one day at a time.

Setting the View to Week, changes the display to a seven-day calendar. Open days have a white background and closed are blue. Entries for each day are listed in order by time.

Like the Month view, you can hover over an entry to see more details without having to open it. In this view, clicking the arrows left or right of the date shown shifts the display backwards or forwards one week at a time. When the View is set to Month and depending on how large you have sized the window, you may not be able to see all the entries for a given day. In this case the calendar day is shown with a down arrow in the right corner. Clicking on it changes the display to Day so that you can see the full details.

By default, the calendar is set to display both Notes to follow up and Appointments. Clicking the View type drop-down lets you filter the display to one or the other. Changing the type to Appointments, removes the Follow up entries from showing.

To ensure you don't miss any important tasks, leave it set to All notes. For those with the required permission, it is possible to access another person's calendar. Enter the User's name or search for them using the browser button available.

The calendar for the person selected is shown with their name displayed at the top of the window. From here you can access the Notes and Appointments on their calendar or add new ones. To return to your own calendar, click on the Show My Calendar icon.

Most often, Notes for follow up and Appointments are added to calendars from entries made on a customer's Notepad, from quotes, or other transactions. However, it is possible to Add a Notepad Note for follow up or Appointment from within My Calendar. Using the Month view, click on the correct date. Then open the right-click menu and select Add Notepad Note.

Select the Customer and enter the Subject. By default, the Type is set to Appointment. We will change this to Sales Notes. Enable the Follow up check box and then set the date, time, and user. When finished, click OK.

The note with the Follow up is added to the calendar. Next, we'll add an Appointment with reoccurring dates. From the Month view, click the date for the first Appointment. Then right-click and select Add Notepad Note. Set the Appointment details including the Customer, Subject, For, Start and End time, and Note.

Click the Forward Planning tab to set the options that will create copies of this Appointment on future dates. Now, select the days of the week the Appointment will appear. To select more than one day, use Ctrl and click.

Now set the Frequency in weeks. To have it occur every week, enter one. For every other week enter two, and so on. Finally, set the number of weeks you want Appointments created. Before completing the entry, select See Appointment Dates to confirm the entries.

In this example, Appointments will be generated Tuesdays and Thursdays, every two weeks starting from the date shown, and lasting for eight weeks. All of the Appointment dates that will be added to the calendar are listed. Close the window. Make adjustments as needed and when finished, click OK to save the entry.

If the Appointments are not shown immediately, click the Refresh button. Clicking the arrow to view the next month shows the remaining Appointments scheduled. Changes to the Appointments added using the Forward Planning need to be changed or deleted on an individual entry.

To do this, select the Appointment, and then open the right-click menu. Use Open Notepad Note to make changes and Delete Notepad Note to remove an entry. From this menu you can also open the properties of the Customer associated with the Note. Open the Notepad tab.

All of the Appointments added to the calendar appear on the Customer's Notepad. You can change or delete any of the Notes from here. Within the Notepad tab is a Calendar button. Clicking on it shows the Customer's Calendar with the Notes for follow up and Appointments specific to them.

The same right-click menu options are available from the Customer's Calendar for adding, opening, or deleting a Notepad Note.

Keeping track of your Notes for follow up and Appointments can be done easily using BisTrack's Calendar functionality. You should be able to change the calendar views using the Day, Week, or Month options and filter the view by type and user. It should also be simple for you to add and maintain notepad notes from within a calendar.

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Corporate Office
804 Las Cimas Parkway
Austin, TX 78746
USA
Toll Free: +1.888.448.2636
Direct: +1.512.328.2300
Fax: +1.512.278.5590

Latin America and Caribbean
Blvd. Antonio L. Rodriguez #1882 Int. 104
Plaza Central, Col. Santa Maria
Monterrey, Nuevo Leon, CP 64650
Mexico
Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

Europe, Middle East and Africa
No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom
Phone: +44.1344.468468
Fax: +44.1344.468010

Asia
238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684
Singapore
Phone: +65.6333.8121
Fax: +65.6333.8131

Australia and New Zealand
Suite 2 Level 8,
100 Pacific Highway
North Sydney, NSW 2060
Australia
Phone: +61.2.9927.6200
Fax: +61.2.9927.6298