

DIARY

Technology Blueprint Limited

Developer of:

PropCo Enterprise™ Residential Lettings, Management and Accounts Software




in the **office.**

Technology Blueprint Ltd.

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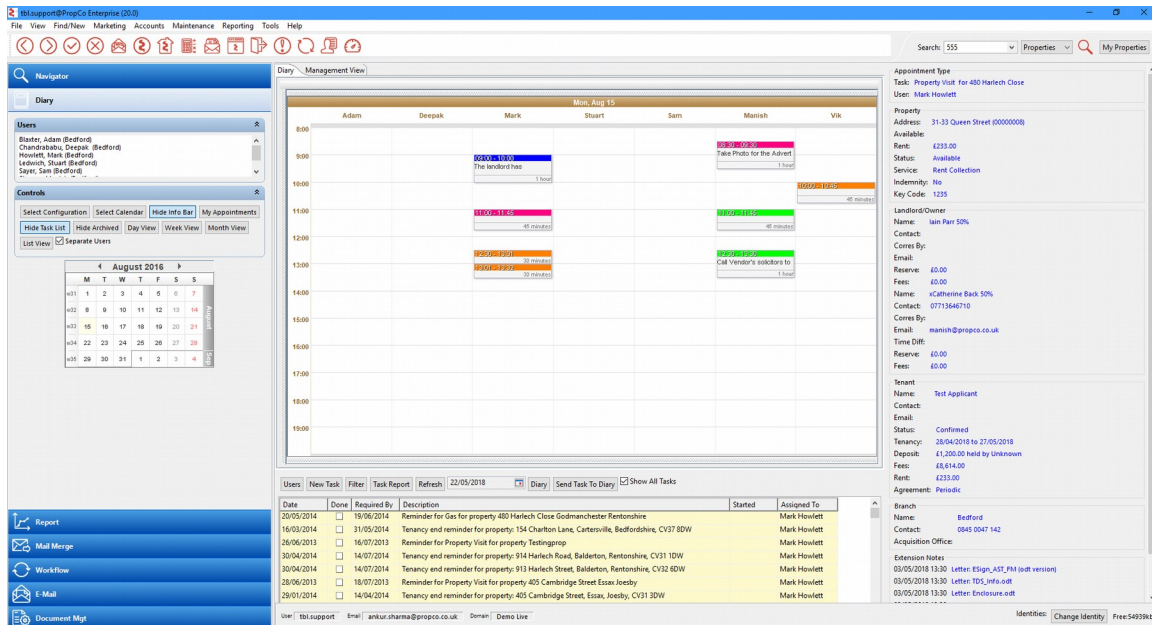
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DIARY

PropCo has an centralised diary which can be used for managing appointments, assigning tasks to other users, highlighting events or information relevant for the office, and more.

It can be viewed from the button on the Function Stack on the left side of the Home page.



The screenshot displays the PropCo Enterprise (2016) software interface. The main window is titled 'Diary - Management View'. On the left, there is a 'Navigator' panel with a 'Diary' button. Below it, a list of users is shown, including Adam, Chandrababu, Deepak, Howlett, Mark, Ledwith, Stuart, and Steve. A 'Controls' section offers options like 'Select Configuration', 'Select Calendar', 'Hide Info Bar', and 'My Appointments'. A calendar for August 2016 is visible, with a date picker set to August 15. The central area is a grid showing appointments for users: Adam, Deepak, Mark, Stuart, Sam, Manish, and Vik. The grid shows various tasks with durations, such as 'The landlord has...' and 'Task Photo for the Agent'. Below the grid is a table with columns: Date, Done, Required By, Description, Started, and Assigned To. The table lists several tasks, including reminders for gas, property visits, and tenancy reminders, all assigned to Mark Howlett. On the right, a detailed view of an appointment is shown, including the appointment type, user, property address, and various fees and status information.

Selecting Users

Select the date using the calendar on the left and then press **Select Calendar** the button and tick / select the user(s) you wish to see the diary of:

- Branch
- Training
- Hardy, Simon
- Howlett, Mark

Names of users that are selected are displayed in the Users box in the navigator panel and their appointments on the right.

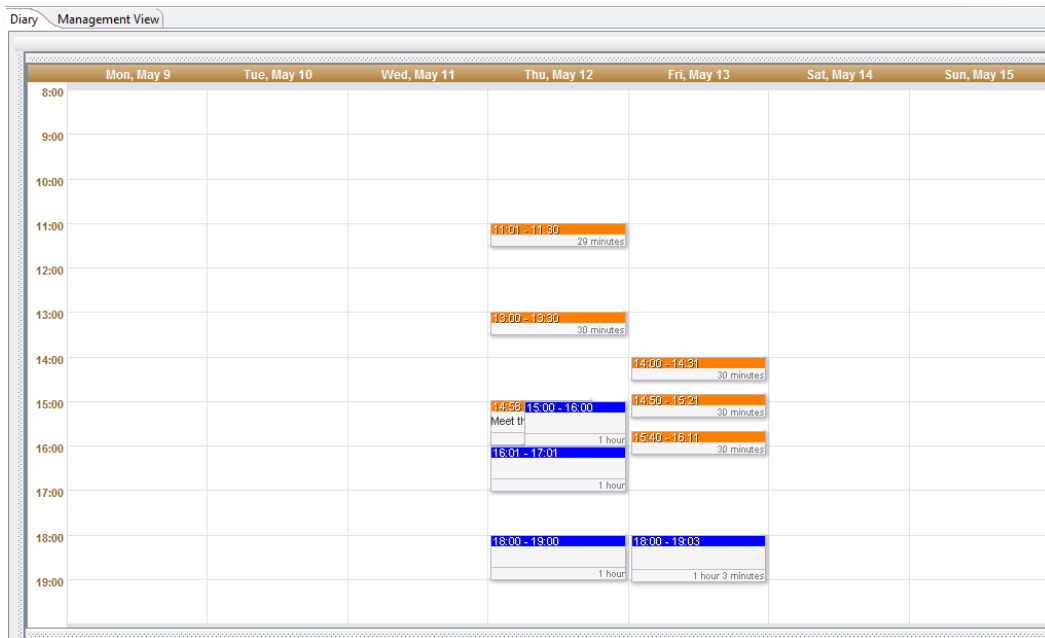
Users

- Howlett, Mark (Branch)
- Ledwich, Stuart (Branch)
- Sharma, Manish (Branch)

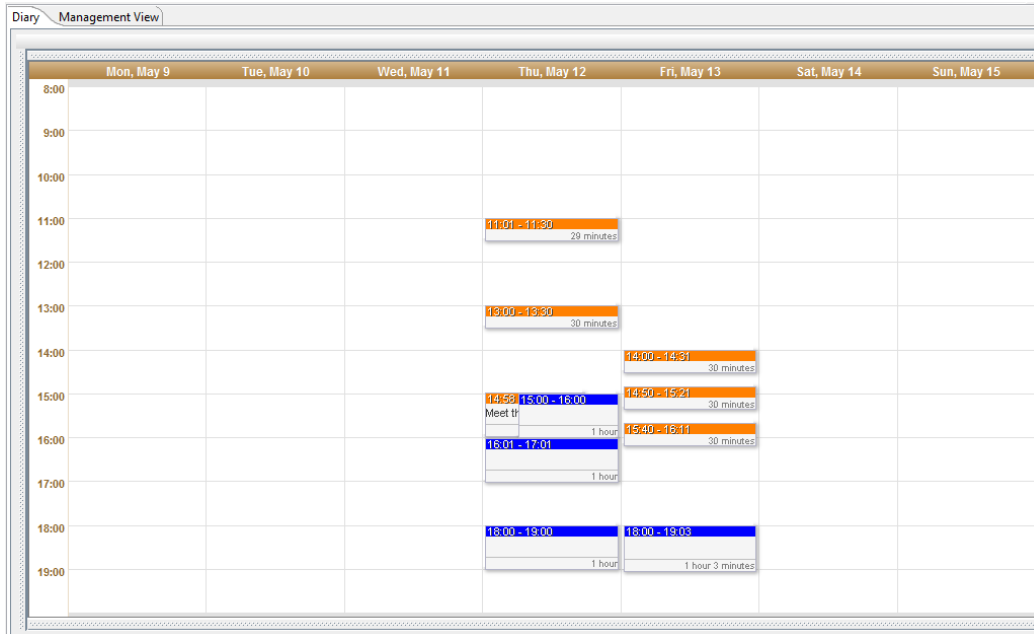
Changing the Diary View

You can change the view of the diary to either Day, Week or Month View by clicking:

Week View:



Month View:



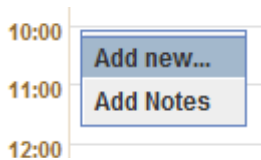
Management View

Date	Time Range	User	Description	Summary
Mon 07/01/13	11:45 - 12:45	Mark,Howlett	Market Appraisal	Valuation : 1 The Street
Mon 07/01/13	14:30 - 15:00	Manish,Sharma	Property Visits	Property Visit: 12 Manor Road

A further Management View option is also available if the user wants to see the appointments in list form.

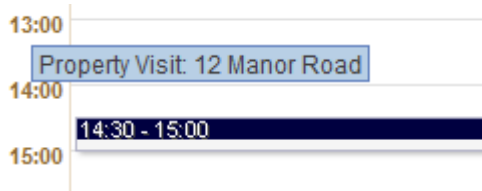
Adding a new appointment

To add an appointment, right-click on the appropriate time-slot for the relevant user and select **Add New** as shown below,



Then fill out the appointment details as explained earlier in this guide and press OK.

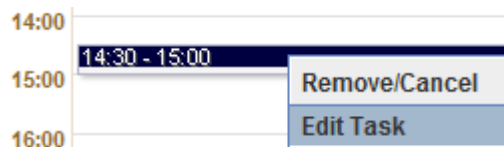
The task is added to the diary as shown below.



Hovering the mouse over the appointment reveals the task narrative

Editing/Canceling appointments

We can right-click on the task and amend or remove / cancel the task



A reason is required when canceling an appointment which is then displayed under Task Notes when the appointment is viewed through the property/person's record (if) it was linked to.

Task Narrative:

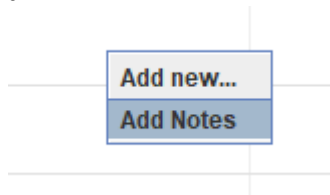
Task Notes

Cancelled : cancelation due to royal wedding

Empty Care Visit #2

Adding Diary Notes

We can right-click on the diary anywhere and add a Diary Note, which allows user to record a note per day per branch , which acts as one stop point for the branches activities on the day

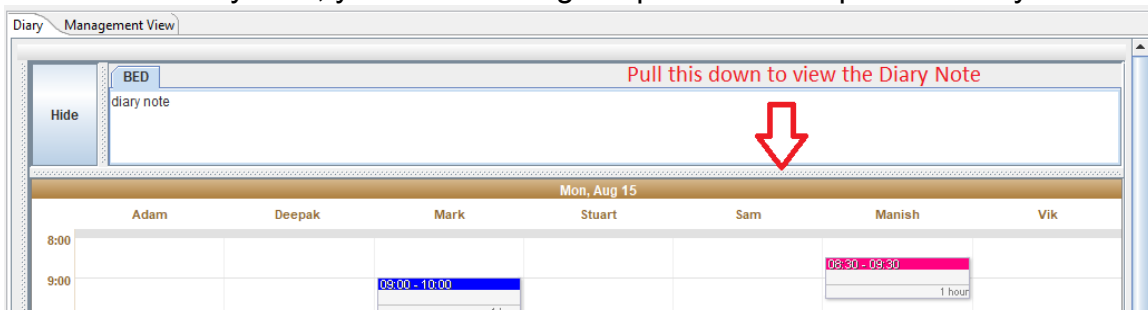


This note has to be specific to the office it's linked to. Hence, only one note per day per office can be allowed. User is allowed to edit/add notes by right clicking on the day and selecting the Add notes option.

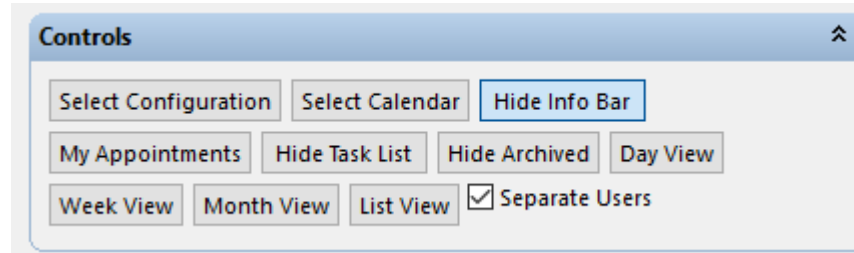
In case a user has access to multiple offices, then he will be able to view the daily notes of each office in the same notes window in which different offices notes will come but under different tabs.

On the diary, a day which has got a day note , the day will be highlighted in a separate colour.

To view the diary note, you need to drag the panel at the top of the Diary down



Additional Diary Controls



- Select Configuration:** User to create a default layout of the diary
- Show / Hide Info Bar:** Shows an information panel when the cursor is moved over the appointment
- My Appointments:** Quick way to toggle between your appointments and those assigned to other users. Only relevant if more than one user is selected.
- Show/Hide Task List:** Show/Hides the Task List
- Hide Archived:** Temporarily hides any tasks associated with properties that are archived
- Separate Users:** It shows a combined view of the appointments for all the selected users if ticked. Only relevant t if more than one user is selected.