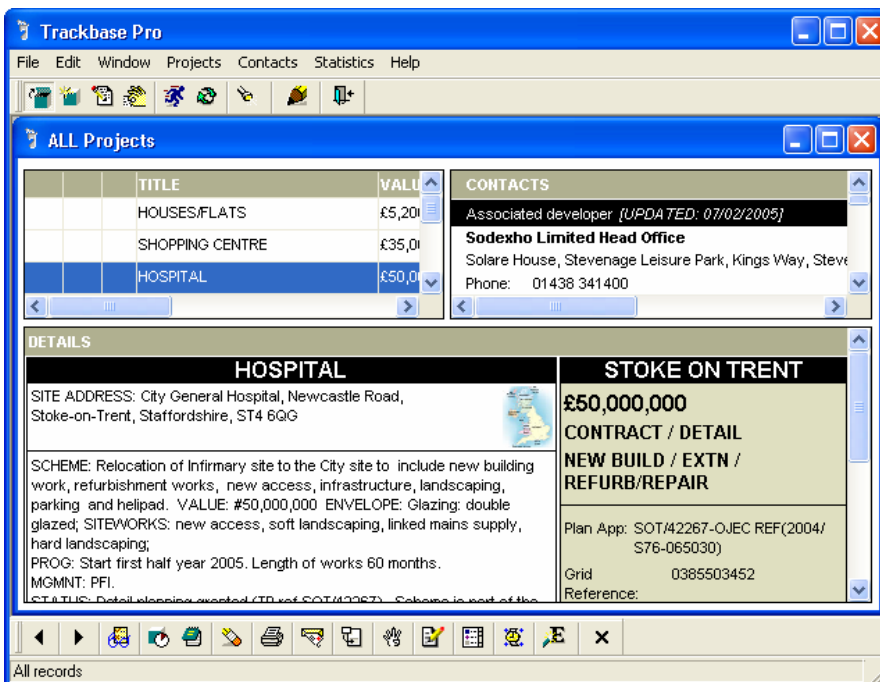


Making a Diary Entry for a Project Using the Trackbase Diary

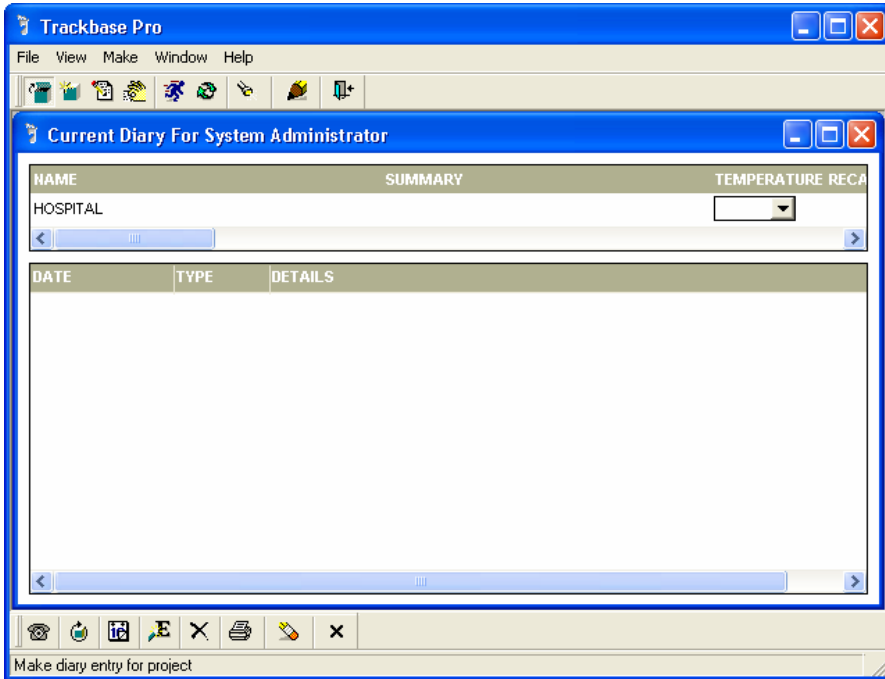
Open Trackbase Pro and go to the project screen.

Open the project you wish to make a diary entry for.

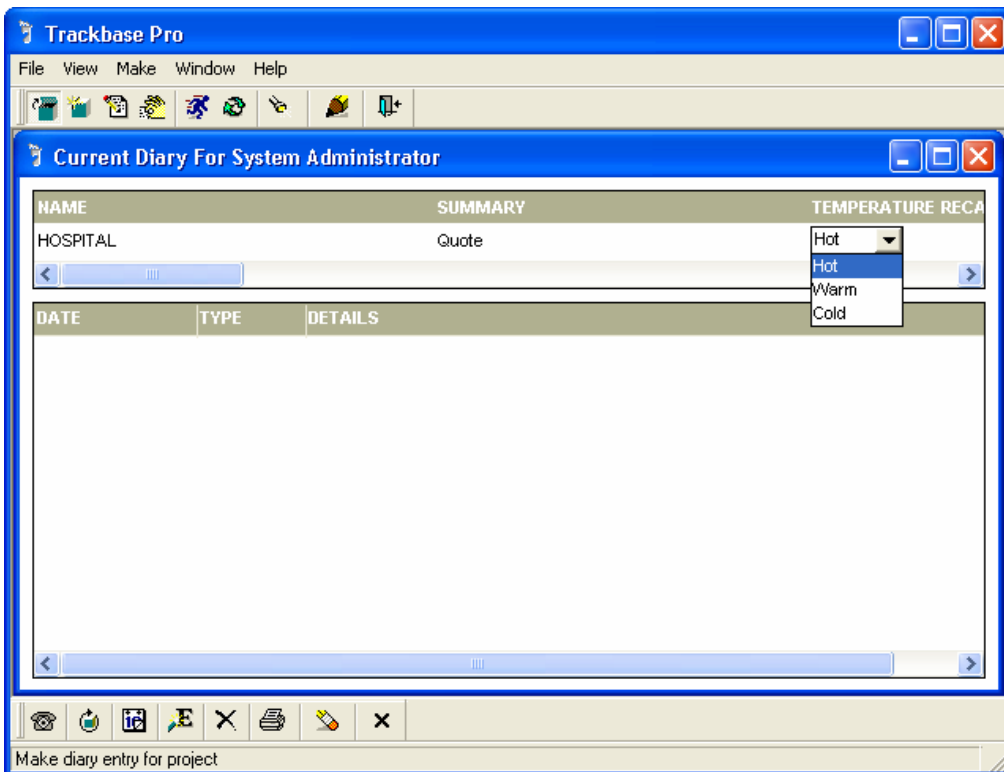




Click on the Diary button  on the bottom toolbar.


This will open the diary screen shown below:

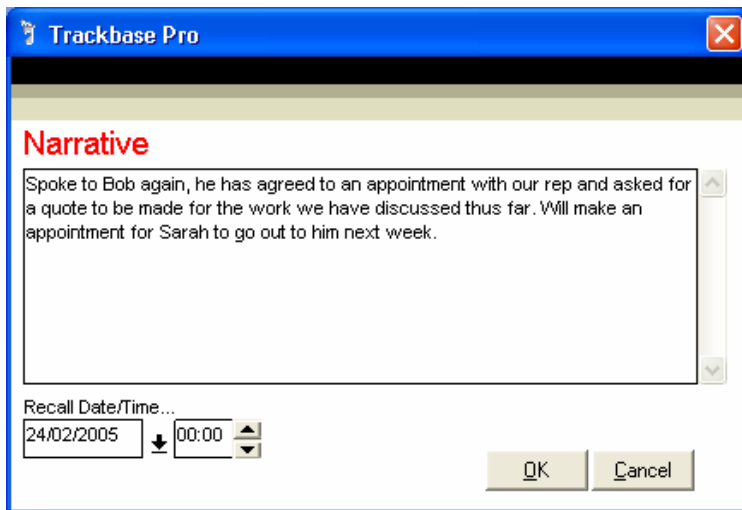


The cursor will be flashing under the 'Summary' header. You need to type in a brief summary of the entry. In this example I will be typing "Quote" to allow me to see at a glance that I have agreed to send a quote for this project. I can then also set a temperature for this diary entry. I will choose "Hot" as I think I have a good chance of getting this project.



Next decide whether you are making a "Call"  or a "Spin" . A call is usually when you have spoken to the decision maker. A spin is when you have not got through at all, or spoken to a person who could not make a decision.

To make a call, click on the call button  on the bottom toolbar. The 'Narrative' window will open, allowing you to type in details of your conversation, and set a date and time for a return call.



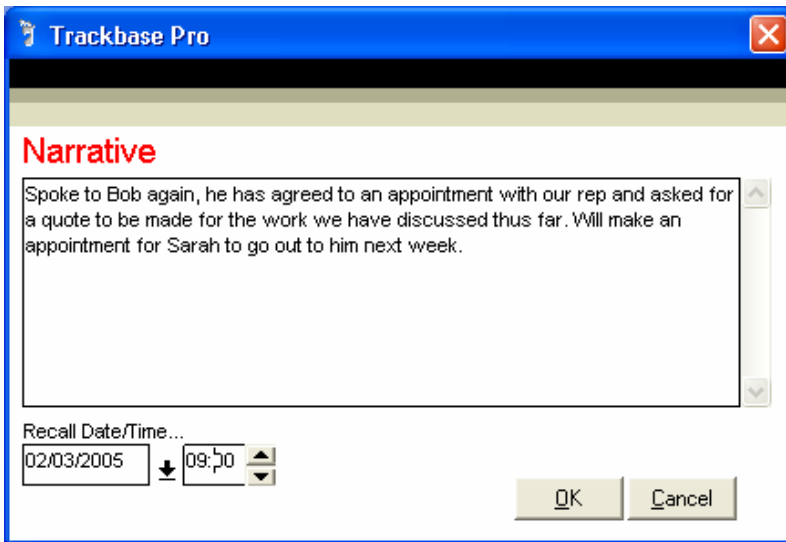
Set a date for the follow on call by either typing the date in the format dd/mm/yyyy or by clicking on the black arrow next to the date. This will open a calendar for you to select a date from. To select a date, double-click on it.



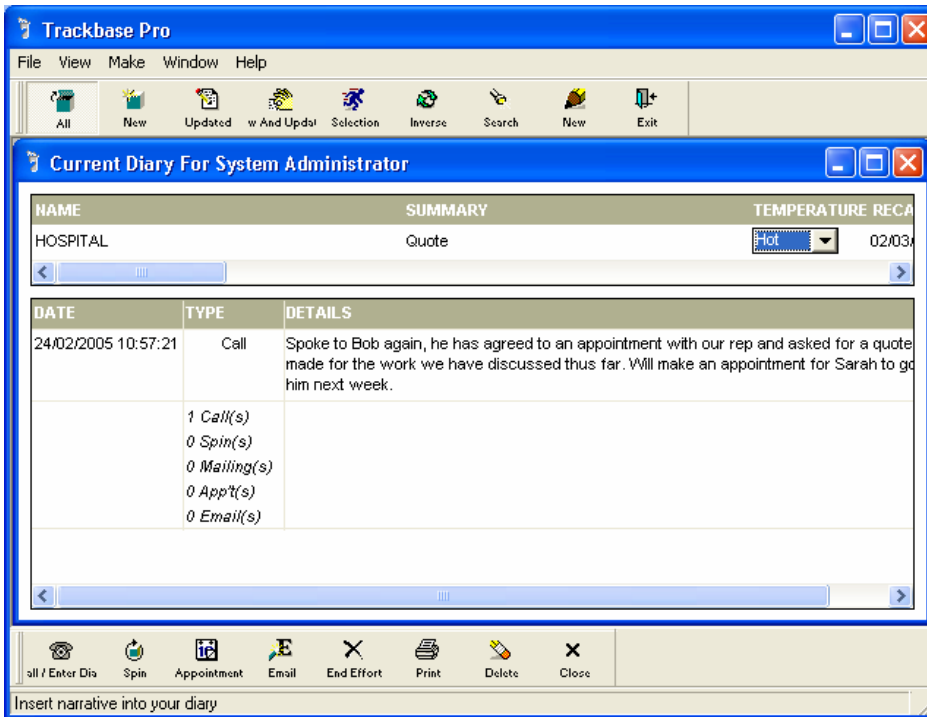
You can also set a time for your follow on call.



Click on the hour and then use the up and down arrows on the right to change the hour, then click on the minutes and again use the arrows to change the minutes.

Once you have set the date and time you wish to call back on, click on 'OK'.



The information will be added to the Trackbase Pro diary as shown below:



You can also make an appointment  or send an email  in the same way by using the icons on the bottom toolbar.