



Fiji Public Trustee Corporation Limited My Diary Module- User Manual



My Diary

User : Organization Officer , Customer Officer , Trust Officer , Registry Clerk , Accounts Officer

This screen helps to Create, Search and Open My Diary. To navigate to this screen click on the **My Diary** from the menu and click **My Diary**.

The screenshot shows the 'My Diary' module interface. On the left is a sidebar menu with icons for Admin, My Diary (selected), My Task, Files, Organization, CRM, Trust, Will, Estate, Legal, and Finance. The main area has a search bar and a table of diary entries. The table has columns: Date, Event, Title, Priority, Correspondence, Start Reminder On, Status, and Action. There are two entries displayed.

Date	Event	Title	Priority	Correspondence	Start Reminder On	Status	Action
05 Sep 2024	Remainder	New	Low	Email	04 Sep 2024	Open	
12 Sep 2024	Remainder	To meet ganesh	High	Face to face	04 Sep 2024	Open	

Search Criteria

1. Click **Search** button, “**My Diary**” Search pop up will be displayed, wherein the user can search based on the given parameters.



Fiji Public Trustee Corporation Limited My Diary Module- User Manual



The screenshot shows the 'My Diary' module interface. A 'Task Search' pop-up is displayed with the following filters:

Field	Value
Date (From)	
Date (To)	
Event Type	All
Priority Type	All
Correspondence Type	All
Reminder Date (From)	
Reminder Date (To)	
Status	All

The background shows a list of tasks with columns for Status and Action. The status is 'Open' and the action is a circular arrow icon.

2. Enter/Select any of the fields among Date (From) , Date (To) , Event Type , Priority Type , Correspondence Type , Reminder Date (From) , Reminder Date (To) , Status.

The screenshot shows the 'My Diary' module interface. The 'Task Search' pop-up is displayed with the following filters selected:

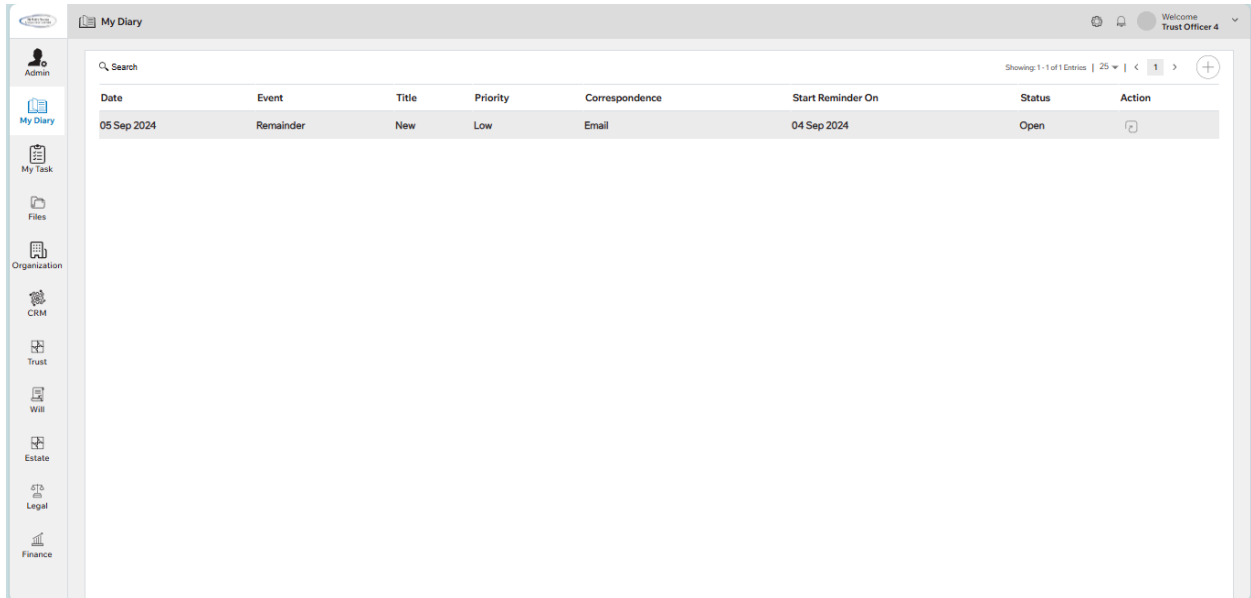
Field	Value
Date (From)	
Date (To)	
Event Type	All
Priority Type	Low
Correspondence Type	Email
Reminder Date (From)	
Reminder Date (To)	
Status	Open

The background shows a list of tasks with columns for Status and Action. The status is 'Open' and the action is a circular arrow icon.

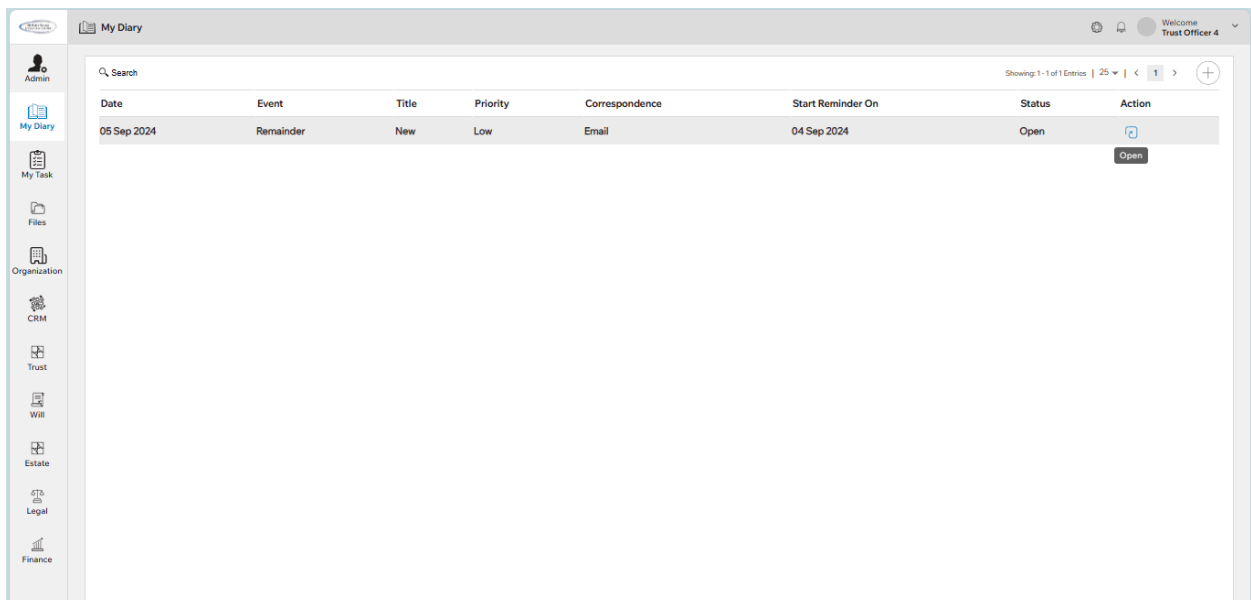
3. Click the **Search** icon on top of the pop up to get corresponding results.



Fiji Public Trustee Corporation Limited My Diary Module- User Manual



4. Click the **Clear** icon next to the search icon to clear all the entered values in the fields.
5. Click the **Close** button to exit the search panel.
6. Click the **Open** icon from the Grid to navigate to the Customer detail screen.



7. Select the page number to directly go to that particular page.
8. Click the > button on the top right corner to navigate to the next page.
9. Click the < button on the top right corner to navigate to the previous page.
10. Select the Records count on the top right corner to show the required number of records per page.



Fiji Public Trustee Corporation Limited My Diary Module- User Manual



Adding a New Diary:

11. Click the **Add** icon, and “**My Diary Add Detail**” pop up will be displayed to add the My Diary Details.

The screenshot shows the 'My Diary' interface. On the left is a sidebar with navigation icons for Admin, My Diary, My Task, Files, Organization, CRM, Trust, Will, Estate, CTA, Legal, and Finance. The main area displays a table of diary entries. The table has columns for Date, Event, Title, Priority, Correspondence, Start Reminder On, Status, and Action. There are two entries listed. Above the table is a search bar and a status indicator 'Showing 1-2 of 2 Entries'. In the top right corner, there is a user profile section with a dropdown arrow and the text 'Welcome Trust Officer 4'. An 'Add New' button is located in the top right corner of the table area.

Date	Event	Title	Priority	Correspondence	Start Reminder On	Status	Action
05 Sep 2024	Remainder	New	Low	Email	04 Sep 2024	Open	[Icon]
12 Sep 2024	Remainder	To meet ganesh	High	Face to face	04 Sep 2024	Open	[Icon]

12. Enter/Select Date , Time , Event Type , Priority Type , Corresponding Type , Start Reminder On , Title , Notes .
13. Click the **Save** icon on the top right corner in the pop up to save the customer details and to redirect to the customer detail screen.



Fiji Public Trustee Corporation Limited My Diary Module- User Manual



My Diary > Add Detail

Date * 08 Sep 2024 Time * 09:00 AM Event Type * Reminder

Priority Type * High Correspondence Type * Email Start Reminder On * 05 Sep 2024

Title * Meeting reminder

Notes 16 / 250
Meeting reminder

14. Click the **Clear** icon to clear all the entered values in the fields.
15. Once the My Diary details are saved, they will be displayed in the 'My Diary Search' grid screen, and the status will be shown as 'Open' once a reminder is created

Date	Event	Title	Priority	Correspondence	Start Reminder On	Status	Action
12 Sep 2024	Remainder	To meet ganesh	High	Face to face	04 Sep 2024	Open	
05 Sep 2024	Remainder	New	Low	Email	04 Sep 2024	Open	
08 Sep 2024	Remainder	Meeting reminder	High	Email	05 Sep 2024	Open	

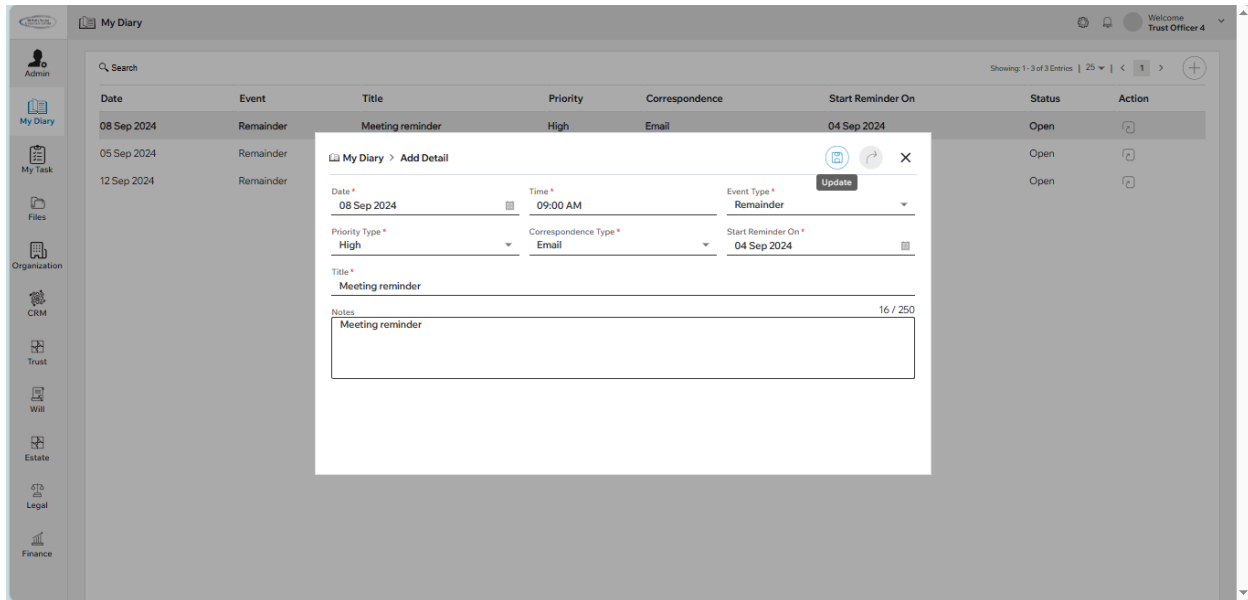
16. Click on the “Open” button under Action and navigate to the “My Diary Add Detail” pop-up screen.
17. Click the **Update** button to save the changes.
18. Click the **Refresh** button to restore the previous values.



Fiji Public Trustee Corporation Limited My Diary Module- User Manual



19. Click the **Close** button to exit the search panel.



20. Once logged into the application, the respective officer will see the “**Reminder List**” pop-up created in “**My Diary**”.

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