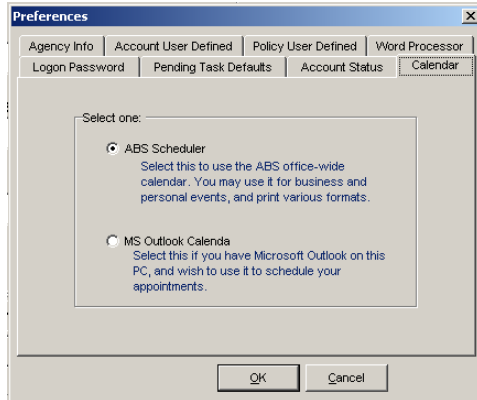


ABS Scheduler Addendum

The Calendar is a no-charge enhancement to the basic ABS Agency Builder, and is available to all ABS Agency Builder users. This option does not increase the annual license fee. This document covers the ABS Scheduler only. Documentation for Microsoft Outlook is not an ABS® product and must be acquired from Microsoft.

CHOICE OF CALENDARS



If you have been using the calendar button on the tool bar to create appointments in Microsoft Outlook, you now have the choice of using either. If you wish to continue using Outlook, you should change the Calendar Preference by clicking Tools > Preferences > Calendar.

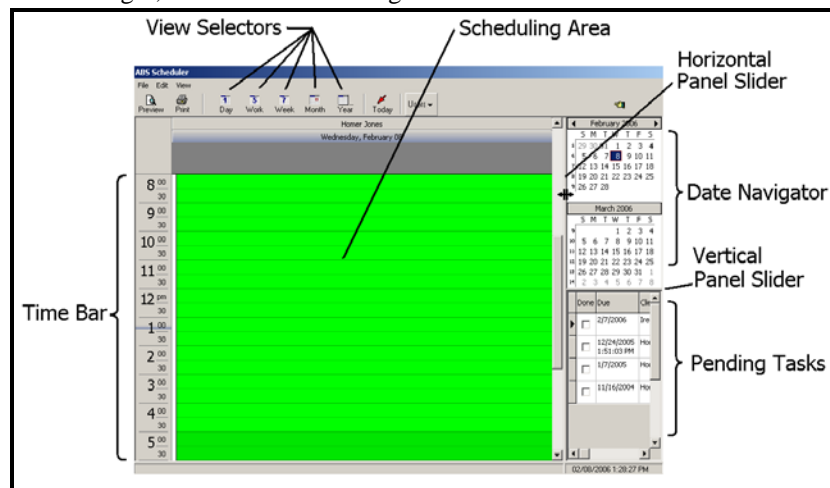
The ABS Scheduler is the default choice. If you wish to use MS Outlook instead, select your preference here. Whichever you pick will control the behavior of the Calendar button on the main account screen, circled below.



Depending on your chosen preference, clicking this button will open the ABS Calendar or will allow you to set an appointment in MS Outlook.

SCREEN LAYOUT

There are three areas of the screen, the Scheduling Area, the Date Navigator, and Pending Task List. The Scheduling Area is at the left of the screen, and contains the Calendar View. The Date Navigator is in the upper right area, and the Task List is in the lower right, below the Date Navigator.



Scheduling Area

This area displays any one of various calendar views. The vertical scrollbar at the right of this area allows each calendar to be scrolled to bring other date or time ranges into view.

Date Navigator

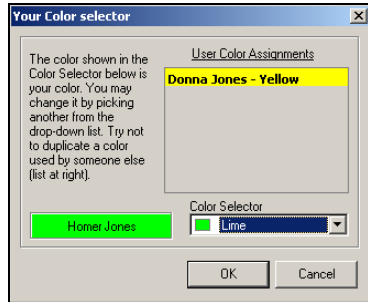
Use the navigator to change dates. You may click a single date, or you may view a range of dates by highlighting up to six weeks.

Task List

The task list is read-only, and can't be edited. It only displays your pending tasks that haven't been marked complete. If you wish to edit your task list, you must do it from the Pending Task list (available from the main account screen).

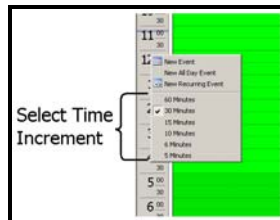
CUSTOMIZING YOUR CALENDAR

Background Color



Click Edit > User Color. The Color Selector dialog box will open. This window shows the colors selected by other users, and allows you to change your color. You can only change your own color. The User ID used to open ABS Agency Builder determines color selection that may be changed.

Time Increments



In Day View, right click the Time Bar on the left. In the popup menu, select the time increment you desire.

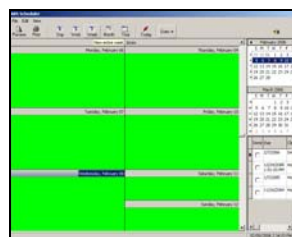
CALENDAR VIEWS

You can select a wide variety of calendar views from the toolbar, or by clicking View from the menu.

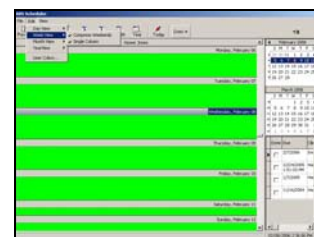
Day View - horizontal slider positioned to show two column Date Navigator



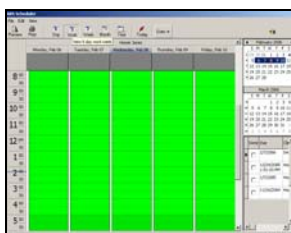
Week View (traditional)



Week View (one column)



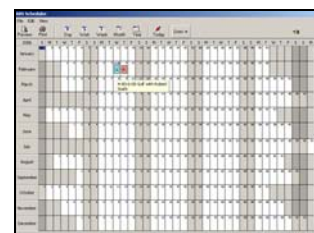
Work Week View



Month View



Year View

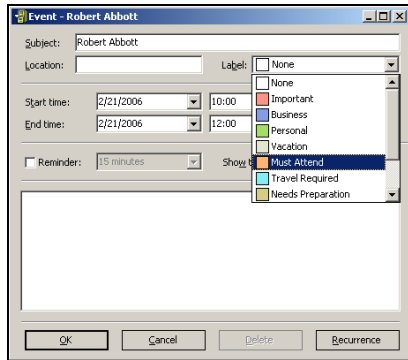


CREATING EVENTS

Events (appointments) can be created by double clicking the Scheduler Area, or by doing the following:

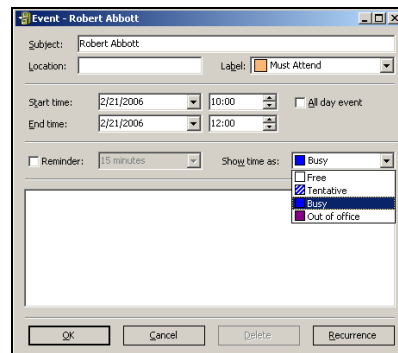
1. Right click the calendar displayed in the Scheduler Area.
2. In the popup menu, select the type of event you wish to schedule.
3. The Event Editor will open.
4. In the Event Editor, select the information that best describes your event.

Event Editor: Selecting Label Color.



This allows you to color code your events.

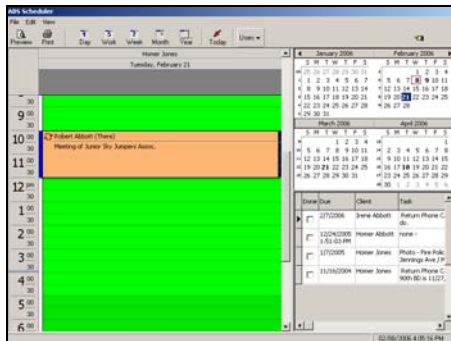
Event Editor: Defining Event Time Display



This causes the display to show if the time is free, or busy. You can also indicate if you will be away or if the scheduled event is tentative.

Note: In the Day View you can click the start time and drag the mouse to the end time. Then begin step 1 above. That will pre-fill the event date and time.

EDITING EVENTS



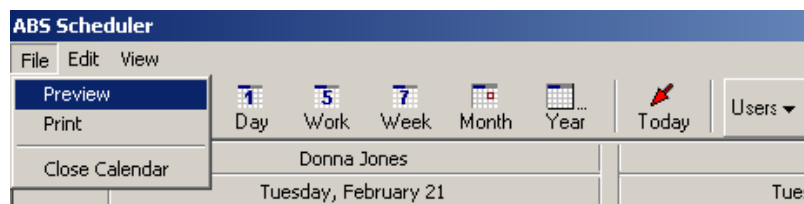
In this example, the event is shown in the time block between 10:00am and 12:00 noon. If you wish to change anything about this event, simply right click it and select Open. This will display the event in the same Event Editor shown above. At this point, you can change any of the event parameters.

DELETING EVENTS

Right click the event and select Delete from the popup menu.

PRINTING

You can click the Preview button, or you can select File > Print or File > Preview.

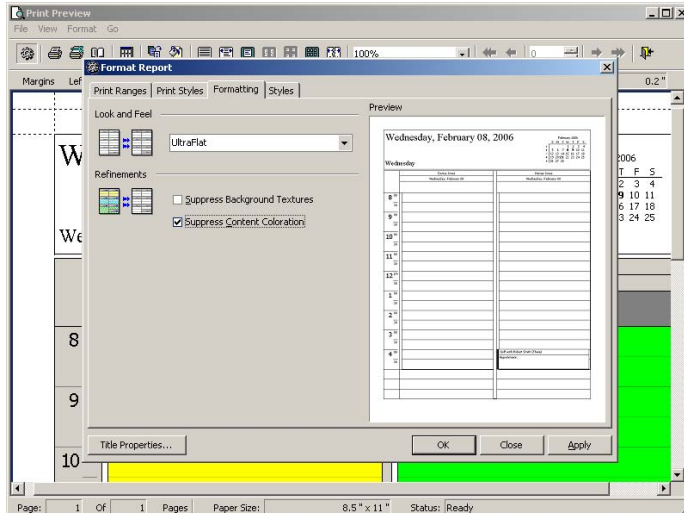


You have the ability to print any of the standard calendar views. For example if you wish to print a Month Calendar, make sure you are viewing the Month View when you print (or preview). Likewise, if you want a day view, make sure you are viewing the Day View.

Report layout

1. Open the print preview option.
2. Click the leftmost toolbar button (looks like a gear).

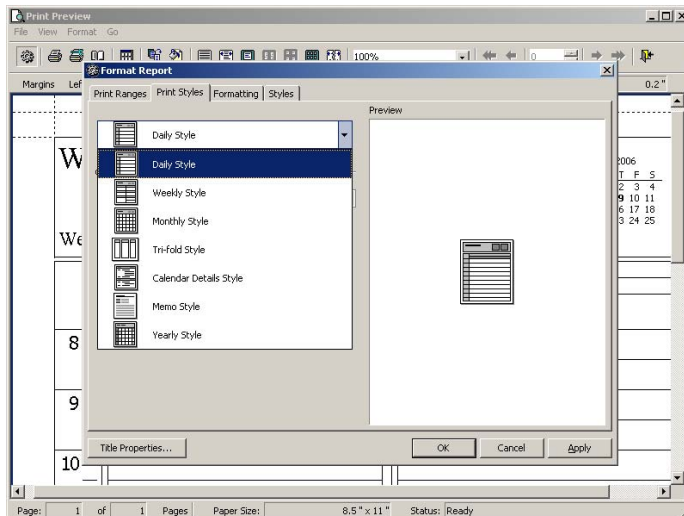
This will open the Format Report dialog. Here you can customize the report to satisfy your own personal preference, or the capabilities of your computer system – especially the printer. Below we will discuss two of the most commonly used formatting tools.



On the **Formatting** tab you will find two check boxes. **Suppress Background Textures** will have little effect since textures are seldom used.

Suppress Content Coloration turns color printing on or off. If you don't have a color printer you should check this box.

If you leave this box unchecked, the calendar will print using the colors displayed on your screen. **We suggest checking this box even if you have a color printer.** A color calendar will use a great deal of ink.



The Print Styles tab allows you to pick any one of various styles to suit your individual needs. We suggest doing a test print to determine which is best for how you plan to use it.

If the calendar will be used at your desk or in a standard 3-ring binder, then one of the full page styles may be best. On the other hand, if you plan to carry this in a coat pocket or purse, then the Tri-Fold may be best.