



# Intelligence Cheat Sheet: Dairy & To Do List

Intelligence Dairy and To Do List operates within Intelligence only.  
There is no integration with your email account calendar.

1. Enable your To Do List
2. Add an Event from the Dairy
3. Add an Event from Communications

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## Enable your To Do List

Tip: The ToDo list floats on top of the Candidate or Client screen, so you can move it to another screen or to the side of your Intelligence window.

1. Select the Diary icon on the left-hand side vertical menu to open your diary.

2. Click on the button "Open ToDo List" to enable your ToDo List.

The ToDo List will now open every time you start Intelligence.

The screenshot shows the Intelligence software interface. On the left-hand side vertical menu, the 'Diary' icon is circled in green. Below it, the 'ToDo List Open' button is highlighted with a green box. A 'Diary Event' pop-up window is open, showing the event 'Shane M - follow up on references' with a time of 12:00. A dropdown menu is visible below the 'Close' button, listing time intervals: 5 Minutes, 10 Minutes, 30 Minutes, 1 Hour, 2 Hours, 4 Hours, 1 Day, 2 Days, and 1 Week. The main window displays a calendar for December 2022, with the 9th of December highlighted in red. The 'ToDo List' window is floating on top of the main window, showing a list of events: '3I Group PLC - call re feedback on interview with candidate' (11:00) and 'Shane M - follow up on references' (12:00). The date '1 Nov 22' is highlighted in red.

3. Your ToDo list shows all outstanding items.

If an event is outstanding, the date is displayed in RED.

4. Double-click on the entry to navigate quickly to that record.

5. You can edit an event by clicking on the Pencil (Edit) icon.

6. You will see an alert pop up if you have added a time to the event.

You can mark this event as:

- Done – this will close the event and hide it from your ToDo List
- Snooze it for various time periods
- Close it – this will keep the event displayed on your ToDo List and highlight it in RED as an outstanding event.

Tip: If you don't wish to display the ToDo List, just click on the button "ToDo List Open" to disable it.

## Add an event from Diary

1. Select the date you need from the calendar.

2. Click on the Plus (Add) icon to add a new event.

3. Your username is selected by default, but you can select another username to assign the diary event to that person.

Note that the diary event will display on the selected person's Diary and ToDo List, not yours.

3. Link the diary event to the CURRENT candidate or client. The current candidate or client is the profile that is visible.

5. Deleted the selected item from your diary.

6. Select the Pencil (Edit) icon to edit the diary entry.

The screenshot shows the 'Intelligence' application window. On the left is a sidebar with icons for 'New', 'Jobs', 'Diary', and 'Reports'. The main area displays a calendar for December 2022, with the 9th of December selected. Below the calendar is a dropdown menu showing the user 'Berni' and buttons for 'Link to Candidate', 'Link to Client', and 'ToDo List Open'. A 'Time Details' window is open, showing an event at 12:00 titled 'Shane M - follow up on references'. To the right of this window are three icons: a plus sign, a pencil, and a trash can. A 'Reschedule Diary Event' dialog box is also visible, with fields for 'DiaryTime' (12:00), 'DiaryDate' (09/Dec/2022), 'Event' (Shane M - follow up on references), 'Done' (checkbox), and 'User' (Berni). A list of recent events is visible at the bottom of the main window.

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## Add an event from Communications

1. Click on the Plus (Add) icon in the Communication section.

2. When the New Candidate or Client Contact form pops up, use the RIGHT-HAND SIDE of the form to create an event in the Diary.

3. Click on the top drop-down option to set an event for another user, or leave it blank to set an event for yourself.

4. Click on the bottom drop-down option to select a pre-defined time period.

You can also click into the date field to select a specific date using the calendar.

5. You can edit the time or leave it blank. If you input a time, you will get an alert popping up at that time. If you leave it blank, it will only appear on the Diary and ToDo List.

The screenshot shows the 'Intelligence' software interface. At the top, there's a 'New Candidate Contact' form with two main sections: 'Contact Detail' and 'Diary Event'. The 'Contact Detail' section includes a date field set to '7 Dec 2022' and a 'Classification' dropdown. The 'Diary Event' section has a 'Time / Date' field and a dropdown menu. A dropdown menu is open from the 'Time / Date' field, listing various call back options: 'Call Back Today', 'Call Back Tomorrow', 'Call Back on Friday', 'Call Back on Saturday', 'Call Back on Sunday', 'Call Back on Monday', 'Call Back on Tuesday', 'Call Back in 1 Week', 'Call Back in 2 Weeks', 'Call Back in 3 Weeks', 'Call Back in 4 Weeks', 'Call Back in 8 Weeks', 'Call Back in 12 Weeks', and 'Call Back in 26 Weeks'. Below the form, there's a 'Communications' list with a search bar and a plus icon. The list contains four entries: '13 Sep 22 Data Update email sent from the Website', '13 Sep 22 Job Alert email sent from the Website', '5 Apr 22 Shane Auto Update: Profile information imported from Li', and '9 Feb 22 Berni Profile information imported from LinkedIn'. A calendar is open for 'December 2022', showing the date '9' selected. A 'Today' button is at the bottom of the calendar.