



integrated broking system

Diary Manual

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Contents

Introduction	3
Configuration Settings	3
Context-Sensitive Filter	4
Diary Filters	4
Diary Functions	5
New Diary Entry	5
Edit Diary Entry	6
Automatic Diary Entry	8



Introduction

The IBS Diary function allows creation and maintenance of diary entries to record required actions or activities. Each diary entry can be optionally associated with a Client, Quote, Risk or Claim, together with an assigned user and a diary date.

Configuration Settings

Several configuration settings are available to control aspects of Diary behaviour.

Setting	Who Resp.	Configuration Options and Behaviour(s)	
DIARY.ALL.USERS	gpm	'N' = do not enable 'ALL' users in Diary filter 'Y' = enable 'ALL' users in Diary filter	
DIARY.OFFSET	gpm	Number of days to pre-date the 'From' date in the Diary filter	
DIARY.ACTION	gpm	(1)	'Y' = Show the No Action/Follow Up options 'N' = Hide the No Action/Follow Up options
		(2)	'Y' = After Follow Up, set current diary entry as Deleted 'N' = After Follow Up, do not set current diary entry as Deleted
		(3)	1 = Default to No Action 2 = Default to Follow Up
Disable Diary Update	Customer	User Permission to <u>disable</u> the automatic display of Diary screen at login and <u>disable</u> the automatic creation/maintenance of a diary entry on every quote, risk and claim	



Context-Sensitive Filter

The Diary function is now context sensitive. This means that the screen from which the Diary function is opened will determine the filtering applied:

Screen	Behaviour
Desktop	Diary entries assigned to the current user
Client	Diary entries for the selected Client for ALL assigned users
Quote	Diary entries for the selected Quote for ALL assigned users
Risk	Diary entries for the selected Risk for ALL assigned users
Claim	Diary entries for the selected Claim for ALL assigned users

Diary Filters

The Diary screen presents a list of diary entries matching the filter criteria.

Filter	Filter Description
From→To Date	Include diary entries with Diary Date within the selected date period
User Name	Include diary entries assigned to the selected User
Include Deleted	Include Deleted diary entries
Include Completed	Include Completed diary entries
Quotes*	Include diary entries associated with quotes
Policies*	Include diary entries associated with risks
Claims*	Include diary entries associated with claims

* Filter options only visible when the Diary screen is opened from the Desktop or from a Client.



Diary entries are listed in Diary Date sequence but the grid can be sorted by clicking on any of the column headings.

Diary Functions

Functions on the Diary screen:

Function	Function Description
Add	Add a new diary entry
Edit	Edit the selected diary entry
Complete	Complete the selected diary entry
Delete	Delete the selected diary entry
Export	Export the diary screen to MS Excel
Policy*	Open the risk associated with the selected diary entry
Claim*	Open the claim associated with the selected diary entry
Quote*	Open the quote associated with the selected diary entry
Close	Close the Diary screen

* Functions only visible when the Diary screen is opened from the Desktop or from a Client.

New Diary Entry

On creation of a new diary entry, the Diary Date will default to the current calendar date and the User Name will default to the current user. Both values can be changed as required.



The Client Code, Name, Policy Number, Claim Number and Quote Number fields can be optionally populated. Depending on the screen from which the Diary function is opened, the Client Code, Name, Policy Number and/or Claim Number may be automatically populated.

Comments can be entered to describe the nature/purpose of the diary entry.

Press Update to save the new diary entry. After pressing the Update button, the diary entry screen remains displayed and the Add button becomes available; pressing the Add button will reset the diary screen for creation of another new diary entry.

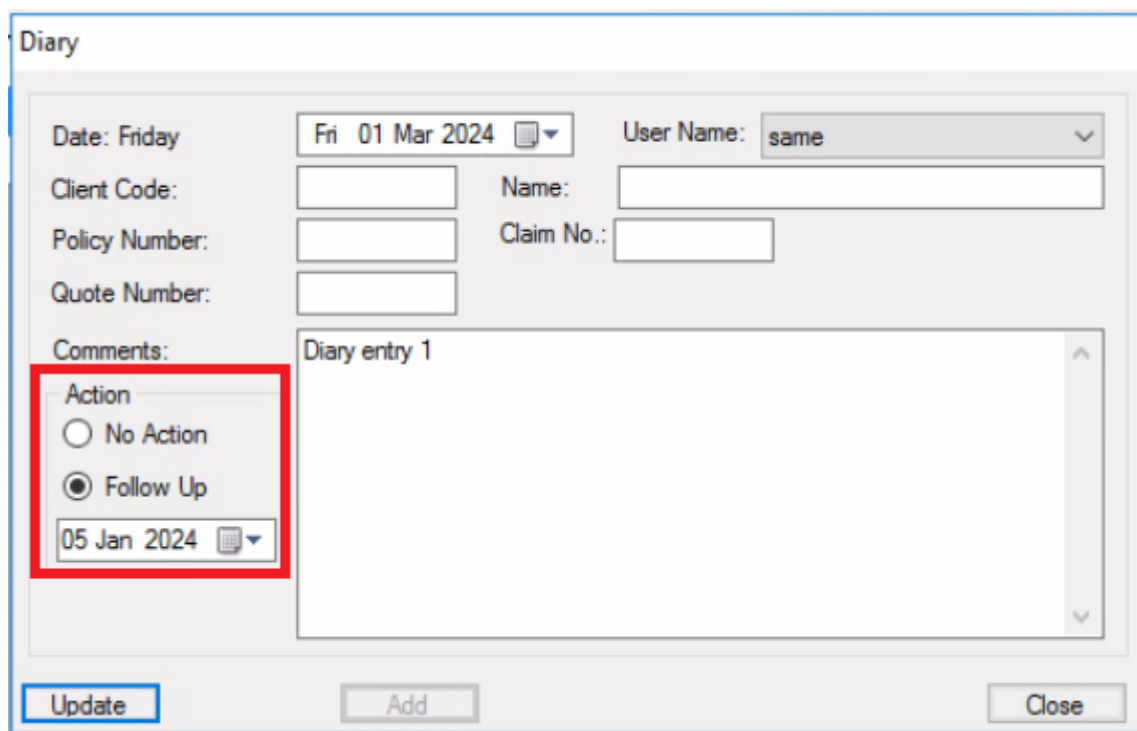
[Edit Diary Entry](#)

On editing a diary entry, the current details for the selected entry will be displayed and all fields may be modified.

A screenshot of a web-based 'Diary' form. The form is titled 'Diary' in the top left corner. It contains several input fields: 'Date: Wednesday' with a dropdown menu showing 'Wed 10 Jan 2024'; 'Client Code:' with a text box containing 'A1235'; 'Policy Number:' with a text box containing 'C240939'; 'Quote Number:' with an empty text box; 'User Name:' with a dropdown menu showing 'same'; 'Name:' with a text box containing 'Agent 1'; and 'Claim No.:' with a text box containing '242'. Below these fields is a large text area for 'Comments:'. At the bottom of the form are three buttons: 'Update', 'Add', and 'Close'. The 'Close' button is highlighted with a blue border.

After pressing Update, revised details will be stored.

If DIARY.ACTION (1) function is enabled, an additional 'Action' option is displayed on the Diary screen containing options for 'No Action' and 'Follow Up' with associated date. The default selection will be based on the configuration of DIARY.ACTION (3):



On pressing Update:

Selected Action	Description
No Action	The existing diary entry is updated
Follow Up	The existing diary entry is updated* AND a new 'follow up' diary entry is created containing the same details

* DIARY.ACTION (2) setting determines whether the current diary entry is automatically set as set as Deleted or not.

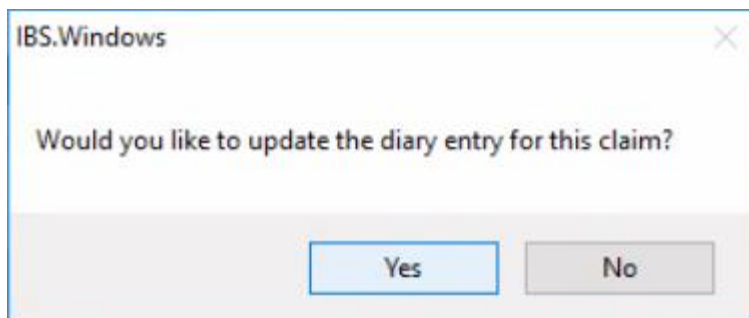
Automatic Diary Entry

Behaviour described in this section is controlled by Disable Diary Update setting. If this setting is selected for a user then the following processing will be bypassed/ignored.

On saving a quote, risk or claim, a new diary entry will be created (if no such 'automated' diary entry already exist for the quote, risk or claim) or will be displayed (if an 'automated' diary entry already exists).

Other 'manual' diary entries can be created and maintained, but only the 'automated' diary entry will be displayed on saving a quote, risk or claim.

On saving the quote, risk or claim, the following prompt will be displayed, allowing the user to choose whether to display the 'automated' diary entry:



Additionally, at login, ibs will display the Diary screen for the current user.