Fast-Class File

SmartOffice

Volume 60: Important Dates Posting

The Important Dates Posting feature will create postings in the SmaCalendar for:
- Contact Birthdays
- Policy Renewal Dates
- Investment Maturity Dates
- Virtually any date captured in SmartOffice

To run the Important Dates Posting feature –
- Select **Calendar** in the main menu.
- Select **Important Dates Posting**.
- Select options for the posting in the **Important Dates Posting** screen.

Figure 1: The Important Dates Posting screen.

- Define the date to be used as the basis for the posting in the **Extract Dates From** section of the **Important Dates Posting** screen.
  - o **Contacts DOB**: Posting will be based on contact birthdays.
  - o **Policy Renewal**: Posting will be based on policy renewal dates.
  - o **Investment Maturity**: Posting will be based on investment maturity dates.
  - o **Extract Dates from Specific Table**: When the **Date Extraction** screen opens, select a table in the **List of Tables** section. The dated fields available in the selected table will appear in the **List of Fields** section. Select a dated field in the **List of Fields** section and click **OK**.
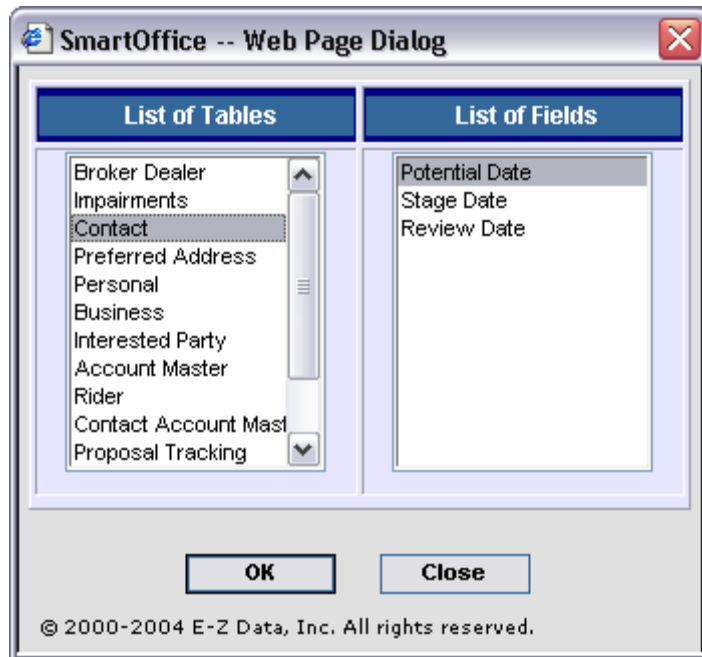

Figure 2: The Date Extraction field (The Potential Date field of the Contact Table selected).

- Define the date range for the posting in the **Date Range** section.
  - o Use the **Pick a Date** button in the **From** and **Through** fields to select the beginning and ending of the posting range.
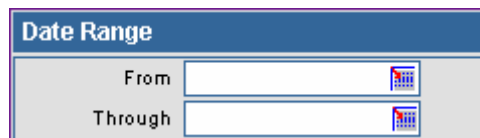

Figure 3: The Date Range section of the Important Dates Posting screen.

Important: The recommended range for Important Dates Posting is three months, especially in the case of postings involving contact birthdays. Postings performed each quarter will help ensure that the birthdays of newly added contacts will be included throughout the year.

- If the posting is to be based on contacts in a set or defined by the criteria of a filter, select the filter or set in the **Select Contacts Using a Set or Filter** section.
  - o Use the **Set** or **Filter** hypertext link to search for the appropriate set or filter – or – enter the name of the desired set or filter in the appropriate field.

- Use the **Date Extraction Options** as follows –

Date Extraction Options

Lead Time	
Ignore year	☑
Skip Saturday	☑
Skip Sunday	☑

Figure 4: The Date Extraction Options section.

  - o **Lead Time**: Enter the number of days lead-time needed for each posting in the **Lead Time** field. For example, entering **5** in the **Lead Time** field will post a reminder of the important date 5 days ahead of the actual event date in the SmartOffice calendar.
  - o **Ignore Year**: Year information of the selected important dates will be ignored. If contact birthdays are the selected important date, the **Ignore Year** option should be selected as the actual birth date captured in SmartOffice occurs in the past.
  - o **Skip Saturday**: No activities will be posted on Saturday.
  - o **Skip Sunday**: No activities will be posted on Sunday.

  *Note: If the **Lead Time** option and **Skip Saturday/Sunday** options have been selected and a posting falls on Saturday or Sunday, the posting will be moved to the Friday before the weekend of the posting.*

- Activities created with the Important Dates Posting feature can be tracked by selecting the **Tracked** option in the **Parameters for creating activities** section.
- Keywords can be added to activities created with the Important Dates Posting feature in the **Parameters for creating activities** section.
- Add information to be posted in the **Activity Reason** field of the **Activity Detail** screen of activities created with the Important Dates Posting feature in the **Activity Reason** section.

*Note: based on the posting selected, information will automatically be added in the **Activity Reason** section, including a merge code for the date used as the basis for the posting.*

- Make changes/additions to the information in the **Subject** field if needed.
- Click **OK** to run the Important Dates Posting utility.
- Newly created activities will be displayed in the **Activities Posted by the Important Dates Posting Feature** screen.

Figure 5: The Activities Posted by the Important Dates Posting Feature.

Best Practices

E-Z Data recommends the following best practices for the important dates posting feature:

- The Date Range for Important Dates Posting should be no longer than 3 months, especially in the case of postings involving contact birthdays. Postings performed each quarter will help ensure that the birthdays of newly added contacts will be included throughout the year.

- To ensure that your SmartCalendar is consistently updated with new Important Date Postings, schedule a reminder in the SmartCalendar to run a new Important Dates Posting three months in the future.

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