Fast Class File

Volume 14: Activity Automove

The Activity Automove feature will automatically move unfinished activities forward in the SmartOffice Calendar. The Activity Automove options are located on the Basic Information tab of the User Preferences.

To open the User Preferences, select **User Setup** from the main menu and then select **User Preferences**. The **Basic Information** tab will display by default. The Activity Automove options are on the lower left hand corner of the **Basic Information** tab.

Jser Preferences - Daniel Odell	× 🖫							
Basic Information Policy/Investment Letter Printing Options Time Zone								
General Information	Default Information							
User Name DanOdell Full Name Daniel Odell Contact E-mail Address dantest@ez-data.com	Default Area Code Default Country Code Default Word Processor Microsoft Word Use SmartMail as my default mail							
Security Question to ask as a password reminder. Answer Type over the asterisks to modify the answer field. Do not use asterisks as part of the answer.	Case Sharing Option Act as a specialist for advisors from other office(s) This setting cannot be changed if your office enables security or is already sharing contact(s) from other office(s).							
Activity AutoMove/Unfinished Appointments Options Maximum days in past to move or display activities 30 Days Activity Types to be Moved Forward Image: Call Image: Cold Cold Cold Cold Cold Cold Cold Cold	Activity Preferences DayView Time Interval 15 minutes Check for Activity Collision							

Figure 1: The Basic Information tab of the User Preferences.

Setting the maximum number of days to move or display unfinished activities

The maximum days in past setting tells SmartOffice how many days between logins to look for and advance unfinished activities. For example, if you are on vacation and do not log in to SmartOffice for 14 days, if your Automove setting is greater than 14 days, all unfinished activities (of specified types) remaining on your Calendar previous to your vacation will be automatically advanced in your SmartOffice Calendar to the current date.



To set the maximum number of days to move or display unfinished activities -

• Click the Maximum days in past to move or display activities drop-down.

Activity AutoMove/Unfinished Appointments Options											
Maximum days in past to move or display activities 30 Days											
Activity Types to b	e Moved Forward										
 ✓ Call ✓ Project 	To Do	🥅 Appointment									

Figure 2: The Activity Automove section of the Basic Information tab (Maximum days in past to move or display activities drop-down highlighted).

Beeic Information Doligu/Investment	Latter Printing On	·· · · · · · · · · · · · · · · · · · ·	10
Basic Information	Letter Frinting Op	3 Days	
General Information		4 Days	
		5 Days	
User Name DanOdell		6 Days	
Full Name Daniel Odell		7 Days	
Question 4		8 Days	
Contact		9 Days	
E-mail Address dantest@ez-data.	com	10 Days	
		11 Days	
		12 Days	
Security		13 Days	
	3	14 Days	
Question to ask as a password reminder.		15 Days	
		16 Days	1
Answer	******	17 Days	7
Type over the asterisks to modify th	e answer field. I	18 Days	
as part of the answer.		19 Days	
		20 Days	
Activity AutoMove/Unfinished Appoin	ntments Option:	21 Days	
		22 Days	-
Maximum days in past to move or display a	ctivities	30 Days	
Activity Types to be Moved Forward			
		Appointment	
1. 1000			

• Select a value between 1 day and 30 days.

Figure 3: The Maximum days in past to move or display activities drop-down.

• The **Maximum days in past to move or display activities** field will be populated with the date selection.



Defining Activity Types to be Advanced by the Automove Utility

Based on your selection, the Automove utility can move the following unfinished activity types forward in the SmartOffice Calendar: Calls, Projects, To Dos, and Appointments. Appointments are a special case, as SmartOffice will automatically copy unfinished appointments to the **Unfinished Appointments** tab whether or not the Appointment type of Activity is selected in the Automove options.

Activity AutoMove/Unfinished Appointments Options										
Maximum days in past to move or display activities 30 Days										
Activity Types to be Moved Forward										
I ⊂ Call I Project	▼ To Do	Appointment								

Figure 4: The Activity Types to be Moved Forward section of the Activity Automove Options.

To select the unfinished activity types to by moved forward in SmartOffice -

- Place a check in the box next to the activity type next to the selected type of activity to be advanced in the SmartOffice Calendar should the activity not be marked as complete.
- Save your settings in the **Automove** options by clicking on the **Save** button in the upper right hand corner.



How the Automove Utility Works

Based on user settings, the Automove utility will move unfinished activities forward in the SmartOffice Calendar to the current day when the user logs in. (Activity types must be specified – Call, Project, To Do, or Appointment – and the user must log in during the time selected in the user preferences – 1 to 30 days)

Unfinished appointments will automatically be copied to the **Unfinished Appointments** tab regardless of selected option in the Automove options of the User Preferences.

Tuesday April 27, 2004	🕚 🖩 🜔 🖻 🕸 🛱 🏹 🗶
DayView DayView List WeekView MonthView Overdue Projects Unfinished	d Appointments
Activities 🗊 🏫 🖘 🗹	' 🗙 To Do 🛛 🕂 🍵 🏠 🐜 (‡ 🗹 🗙
	(P) · Contact Mailer · Mailing materials to printer
-30	C) · F. Johnson ·
	C) · R. Halverson · Premium info
10 AM	C) · M. Arrieta · Training
:15	
:30 T 10:30AM-11:30AM · (A) · J. Ackerman · Investment maturity options.	
:45	
11 AM	
:15	
:30	
:45	
Noon 🗖 🗹 12:00 PM-01:00 PM · (A) · D. Ansong · Networking possibilities and referrals	
:15	
:30	
:45	
1 PM	
:15	

Figure 5: Tuesday April 27 DayView with Timed and Un-timed Activities.

In Figure 5, two activities have been marked as complete, one call and one appointment. Four activities remain unfinished, one appointment, two calls, and a project. Based on selections made in the Automove options section of the User Preferences (see Figure 4), the unfinished Project and Calls will be advanced the next day the user logs in, provided the user logs in again during the next 30 days (see Figure 3).

For this example, the user, Daniel Odell will log in the next day, April 28.



Wednesda	y April 28, 200	14		2.0		2			0	0 🖻	00	7 7
DayView	DayView List	WeekView	MonthView	Overdue Projec	ts	Unfinished	App	ointments				
Activities				1	Î	🏫 🖘 🗹	×	To Do	H	FÛ	🔝 🖘 (j= 1	⊻ ×
9 AM								P) · Con	ntact Mailer	· Mailing	g materials to pr	rinter
:15								🔲 (C) · F. J	lohnson ·			
:30								C) · R. H	Halverson ·	Premiu	n info	
:45												
10 AM												
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Figure 6: Wednesday April 28 DayView with Advanced unfinished activities.

In Figure 6, the unfinished activities from the previous day have been moved in the SmartOffice Calendar in accordance with the settings specified in the User Preferences.

In addition, the unfinished appointment has been copied to the **Unfinished Appointments** tab.

I	Jnfi	nished	Appointm	ent	s							Û	*	T.	ZA	[≡	M	×	PQ	
	Day	/View	DayView Lis	st	WeekView	Мо	nth∀iew		Overdue Projects	l	Unfinished Appointments									
	5	Date		Тіп	ne	Co	ntact Na	me	e		Reason									
		04/27/	2004			Ack	kerman, J	os	eph		Investment maturity opti	ons.								
	Re	cords S	hown: 1 👘	Fota	al Records: 1															
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Figure 7: Wednesday April 28 Unfinished Appointments tab.

