## Fast-Class File

Client Data System

Volume 84: Filter for Moving and Copying Activites

To move a series of activities:

- With the CDS Calendar open, select **Record** in the main menu bar.
- Select Move using Filter in the Record menu.

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Figure 1: The Move using Filter option in the Record menu of the CDS Calendar.

• Define the parameters for activities to be moved in the **Filter for Moving Activities** window using the following options:

Activities: Select Timed or To Do (un-timed) activities to be included in the move.

**Type**: Select the Type of activities to be moved – Appointment, Call, To do, etc. **Priority**: Define the priority settings for activities to be moved.

Date Range: Establish the date range for activities to be moved.

**Next Days/Previous Days**: Instead of defining a range, you can select activities in a given number of days in the past or future to move.

Current Date: Select the activities in the current day to move.

**Create Activity as To Do**: This option will turn all activities selected to move into To Do (un-timed) activities.

Assignee(s): Select the user or users that the activities will be assigned to.

🗖 Filter for M	oving Activities	
Activities		Assignee(s)
Timed	To Do	DEMO
Appointment	Call Todo	
Priority Important	Urgent All Others	
Date Range From 05/01/200	6 Thru 05/12/2006	
Next (in Days) -	Prev (In Days)	
Current Date	Create Activity as Todo	
ОК	Save Filter (	Cancel Help

Figure 2: The Filter for Moving Activities dialogue box.

Important Note: When selecting options in the **Filter for Moving Activities** dialogue box, selecting no options is the same as selecting all options in a section.

- After selecting options to define activity selection, click OK.
- Define the date that the activities will be moved to in the **Destination Date** dialogue box. The current date is selected by default. To change the date, click the **Date** button.

Destination Date
Date 05/19/2006
OK Cancel

Figure 3: The Destination Date dialogue box.

- Click **OK**.
- CDS will move the selected the activities to the destination date.

To copy a series of activities:

- With the CDS Calendar open, select **Record** in the main menu bar.
- Select Copy using Filter in the Record menu.

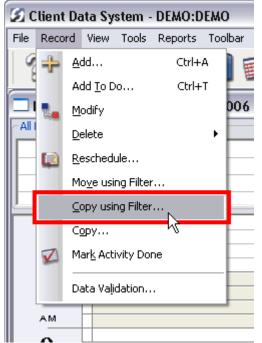


Figure 4: The Copy using Filter option in the Record menu of the CDS Calendar.

Use the same steps listed above for moving activities to copy activities in the CDS Calendar.