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.
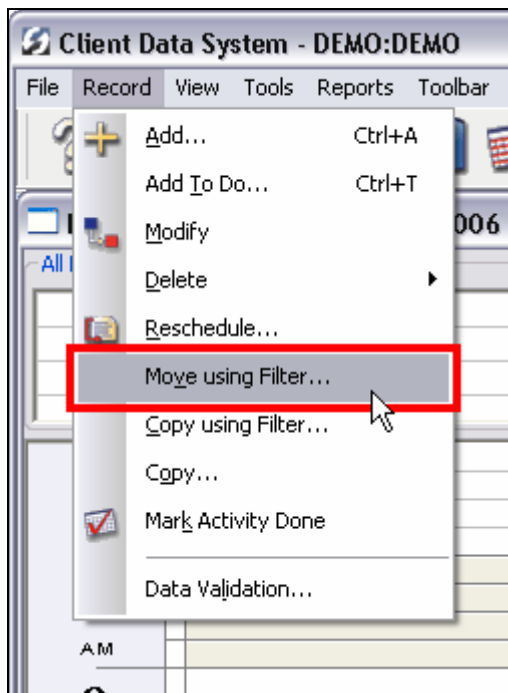- Select **Move using Filter** in the **Record** menu.

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.
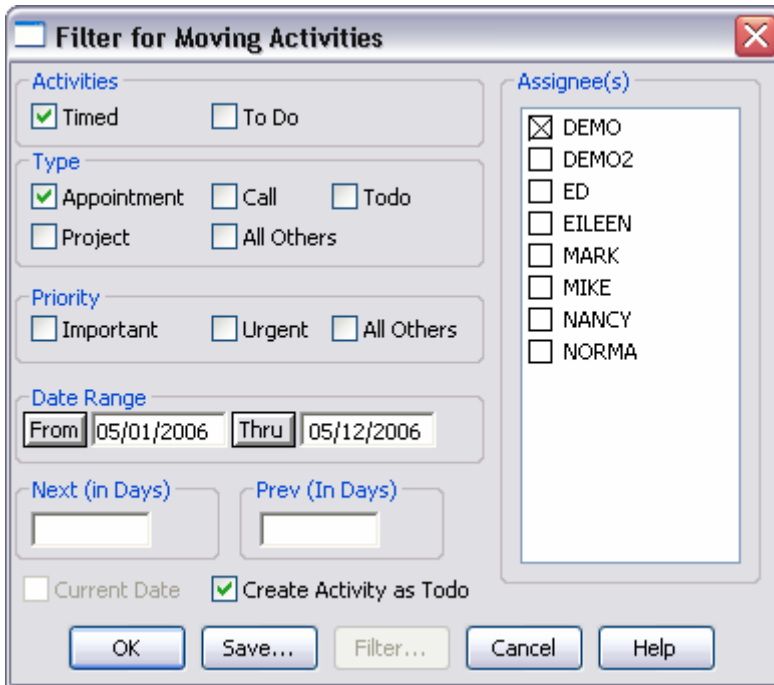
Figure 2: The Filter for Moving Activities dialogue box.

*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.
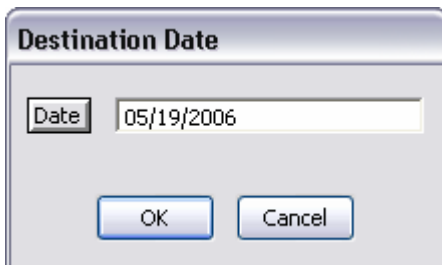

Figure 3: The Destination Date dialogue box.

- 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.
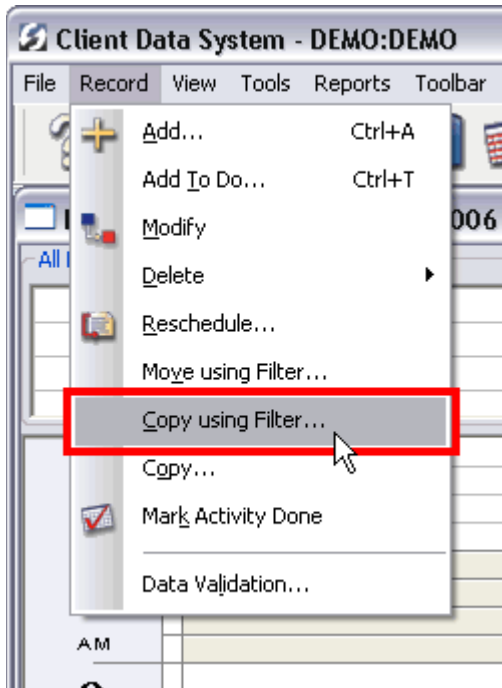- Select **Copy using Filter** in the **Record** menu.

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.