

Fast•Class File

SmartOffice

Volume 44: Activity Search

Using the Activity Search Tool:

- Select **Calendar** in the Main Menu.
- Select **Activity Search**.
- SmartOffice will open the **Area Search Option** screen.

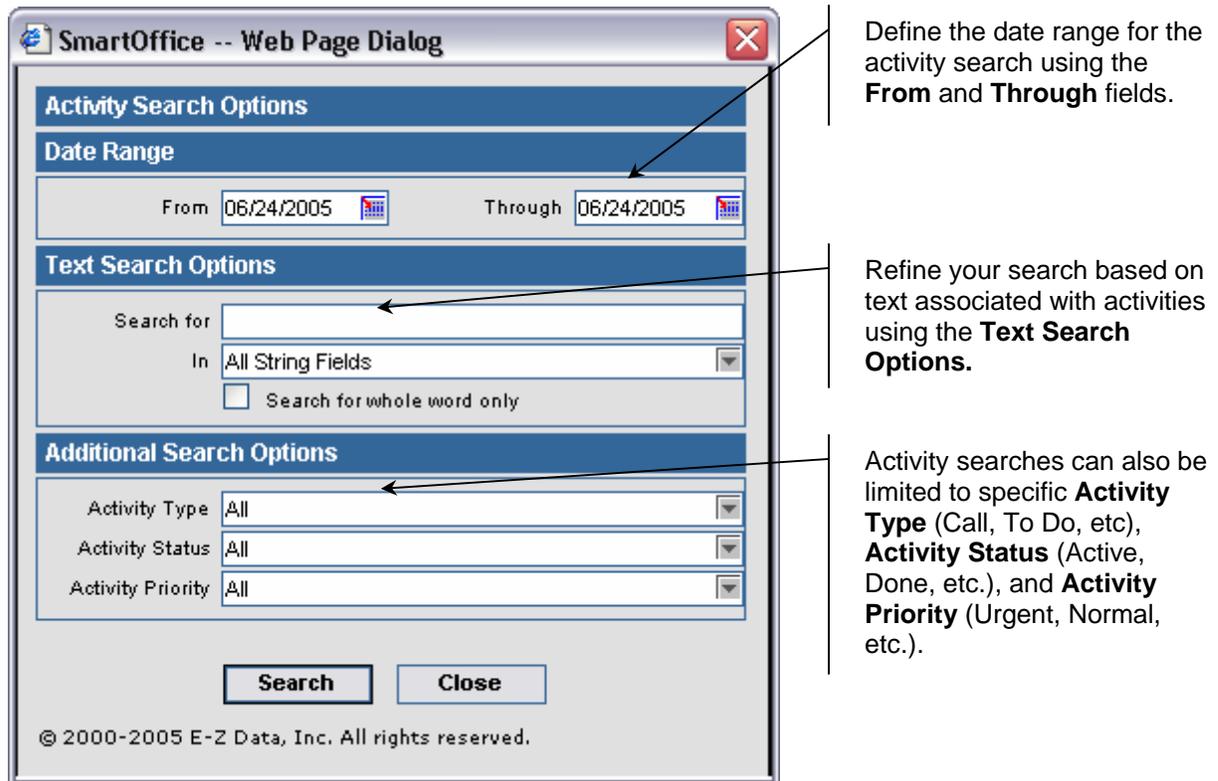


Figure 1: The Activity Search Options screen.

- After entering options, click **Search**.

To Create a Weekly Completed Call Report:

- Select **Calendar** in the Main Menu.
- Select **Activity Search**.
- SmartOffice will open the **Area Search Option** screen.
- Define the week for the report using the **From** and **Through** fields in the **Date Range** section.
- Leave the **Search for** field blank in the **Text Search Options** section.

- Select **Call** in the **Activity Type** drop-down field.
- Select **Done** in the **Activity Status** drop-down field.

SmartOffice -- Web Page Dialog

Activity Search Options

Date Range

From 06/20/2005 Through 06/24/2005

Text Search Options

Search for

In All String Fields

Search for whole word only

Additional Search Options

Activity Type Call

Activity Status Done

Activity Priority All

Search **Close**

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Figure 2: The Activity Search Options screen (Weekly Completed Call Report).

- Click **Search** to create the report.

Activity Search Results (06/20/2005 ~ 06/24/2005)

<input type="checkbox"/>	Date ↑	Contact Name	Type	Sub-Type	Reason
<input type="checkbox"/>	06/20/2005	Arias, Emily	Call	Case Development	Follow-up on annuity proposal of June 11th
<input type="checkbox"/>	06/20/2005	Internet World	Call	Service	Speak to William about latest Group Census records
<input type="checkbox"/>	06/21/2005	Antille, Eugene	Call	Personal	Confirm # of tickets for Dodgers game
<input type="checkbox"/>	06/23/2005	Proby, Martin James	Call	Sales	Seminar Attendee requested more information at Retirement Planning Seminar
<input type="checkbox"/>	06/23/2005	Chevalier, Henry	Call	Sales	Seminar Attendee requested more information at Retirement Planning Seminar
<input type="checkbox"/>	06/23/2005	Wright, William	Call	Initial	Follow-up on Internet Insurance Coverage Survey
<input type="checkbox"/>	06/24/2005	Ansong, Judy A.	Call	Initial	Follow-up on LTC Approach Letter
<input type="checkbox"/>	06/24/2005	Ackerman, Joseph M.	Call	Initial	Follow-up on LTC Approach Letter
<input type="checkbox"/>	06/24/2005	Ansong, David M.	Call	Initial	Follow-up on LTC Approach Letter
<input type="checkbox"/>	06/24/2005	Bartelo, Frank J.	Call	Initial	Follow-up on LTC Approach Letter
<input type="checkbox"/>	06/24/2005	Buy, William	Call	Initial	Follow-up on LTC Approach Letter
<input type="checkbox"/>	06/24/2005	Chung, Harold	Call	Initial	Follow-up on LTC Approach Letter
<input type="checkbox"/>	06/24/2005	Gunderson, Betty	Call	Initial	Follow-up on LTC Approach Letter
<input type="checkbox"/>	06/24/2005	Ansong, Deana	Call	Birthday	Contact Information Birth Date - 06/24/1983

Records Shown: 14 Total Records: 14

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Figure 3: Weekly Completed Call Report.