

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.

SmartOffice -- Web Page Dialog

Select the appropriate options below to automatically post activities to the calendar. To avoid creating activities on weekends, select the Skip Weekends option. Note: Weekend events are posted on the Friday prior to the event. Enter the number of days prior to the event when a reminder should appear on the calendar. To not include the year when selecting activities (e.g., for posting birthdays to the calendar), select the Ignore Year option.

Extract Dates from	Date Extraction Options
<input checked="" type="radio"/> Contact's DOB <input type="radio"/> Policy Renewal <input type="radio"/> Investment Maturity <input type="radio"/> Extract Dates from Specific Table	Lead Time <input type="text"/> Ignore year <input checked="" type="checkbox"/> Skip Saturday <input checked="" type="checkbox"/> Skip Sunday <input checked="" type="checkbox"/>
Date Range	Parameters for creating activities
From <input type="text"/> Through <input type="text"/>	Tracked <input type="checkbox"/> Keywords <input type="text"/>
Select Contacts Using a Set or Filter	Activity Reason
<input checked="" type="radio"/> Set <input type="text"/> Set <input type="radio"/> Filter	ABC Contact Information Birth Date -\$CL_DOB
Subject <input type="text" value="Important Dates Posting - Contact's Birth Date"/>	
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	
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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.
 - **Contacts DOB:** Posting will be based on contact birthdays.
 - **Policy Renewal:** Posting will be based on policy renewal dates.
 - **Investment Maturity:** Posting will be based on investment maturity dates.
 - **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**.

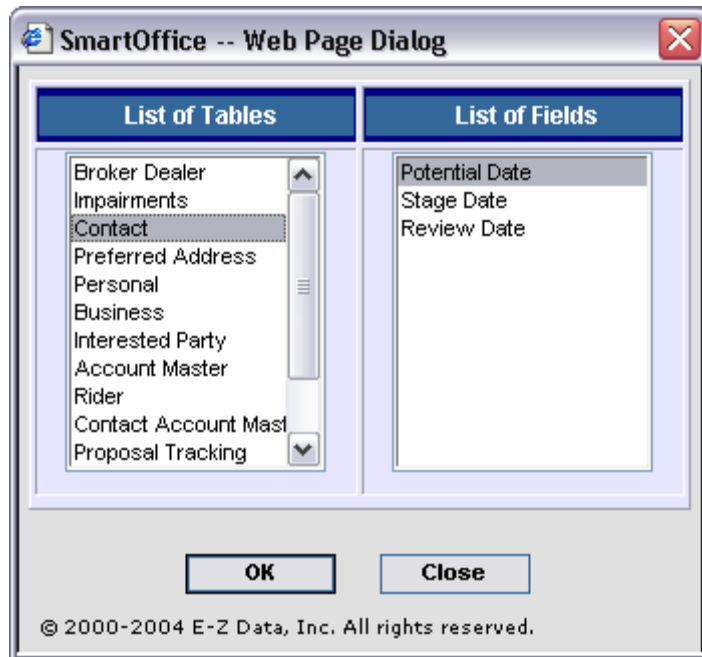


Figure 2: The Date Extraction field (The Potential Date field of the Contact Table selected).

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

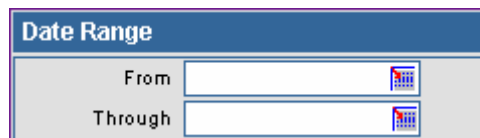


Figure 3: The Date Range section of the Important Dates Posting screen.

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.
 - 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	<input type="text"/>
Ignore year	<input checked="" type="checkbox"/>
Skip Saturday	<input checked="" type="checkbox"/>
Skip Sunday	<input checked="" type="checkbox"/>

Figure 4: The Date Extraction Options section.

- **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.
- **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.
- **Skip Saturday:** No activities will be posted on Saturday.
- **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.

Date ↑	Contact Name	Type	Sub-Type	Status	Reason
<input type="checkbox"/> 12/27/2004	Iverson, Francis H.	Client	A	Active	Contact Information Birth Date - 01/01/1954 Send gift basket - follow-up phone call.
<input type="checkbox"/> 12/28/2004	Wolton, Peter	Client	A	Active	Contact Information Birth Date - 01/02/1945 Send gift basket - follow-up phone call.
<input type="checkbox"/> 12/29/2004	Ackerman, Kathleen M.	Client	A	Active	Contact Information Birth Date - 01/03/1955 Send gift basket - follow-up phone call.
<input type="checkbox"/> 12/29/2004	Ansong, Judy A.	Client	A	Active	Contact Information Birth Date - 01/03/1955 Send gift basket - follow-up phone call.
<input type="checkbox"/> 12/30/2004	Anderson, Mike	Client	A	Active	Contact Information Birth Date - 01/04/1959 Send gift basket - follow-up phone call.
<input type="checkbox"/> 01/03/2005	Marquez, Larry	Client	A	Active	Contact Information Birth Date - 01/08/1956 Send gift basket - follow-up phone call.
<input type="checkbox"/> 01/06/2005	Adcock, Martin	Client	A	Active	Contact Information Birth Date - 01/11/1963 Send gift basket - follow-up phone call.
<input type="checkbox"/> 01/28/2005	Lampanski, Nadia	Client	A	Active	Contact Information Birth Date - 02/03/1966

Records Shown: 22 Total Records: 22

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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.