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.

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.

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

- 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.

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.
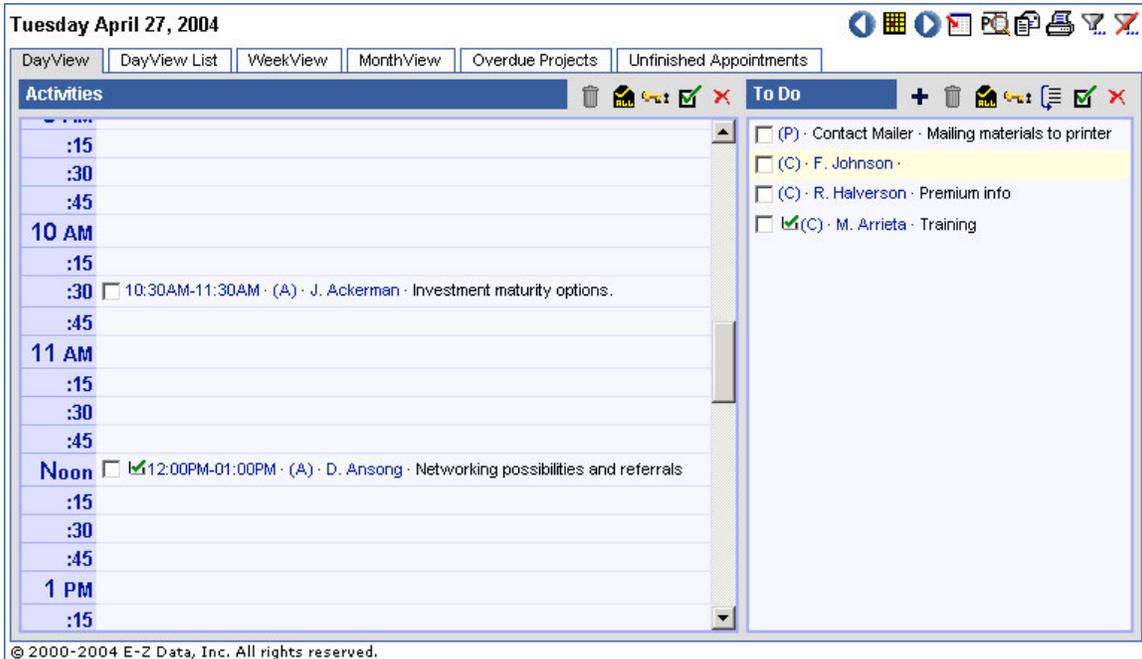

Figure 5: Tuesday April 27 DayView with Timed and Un-timed Activities.

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).

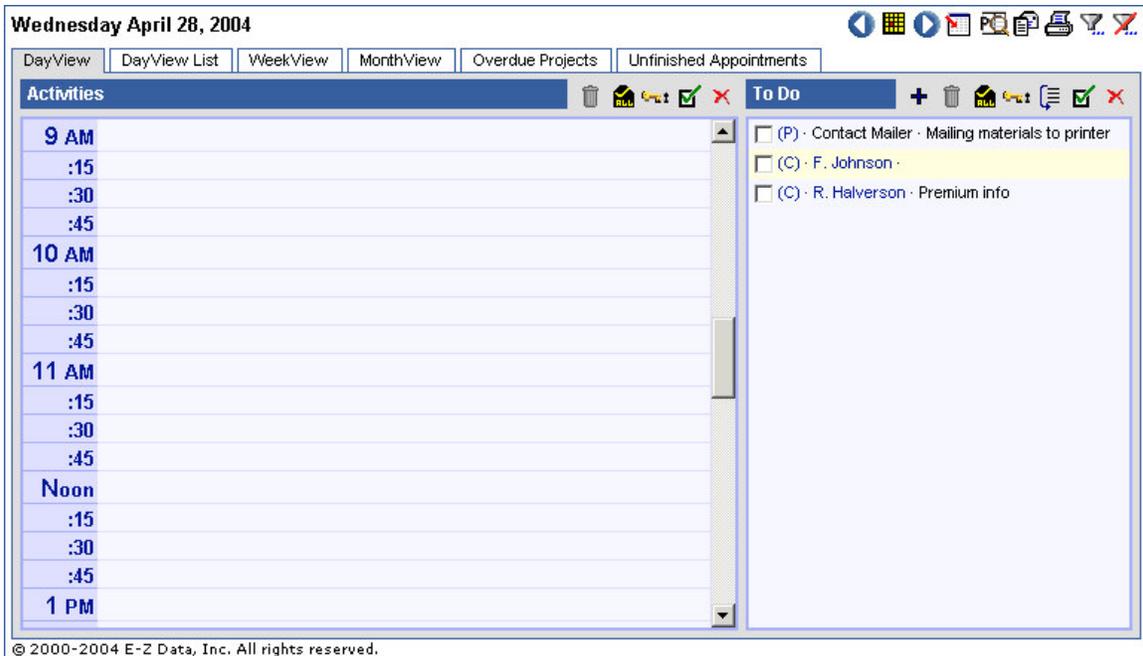For this example, the user, Daniel Odell will log in the next day, April 28.

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.

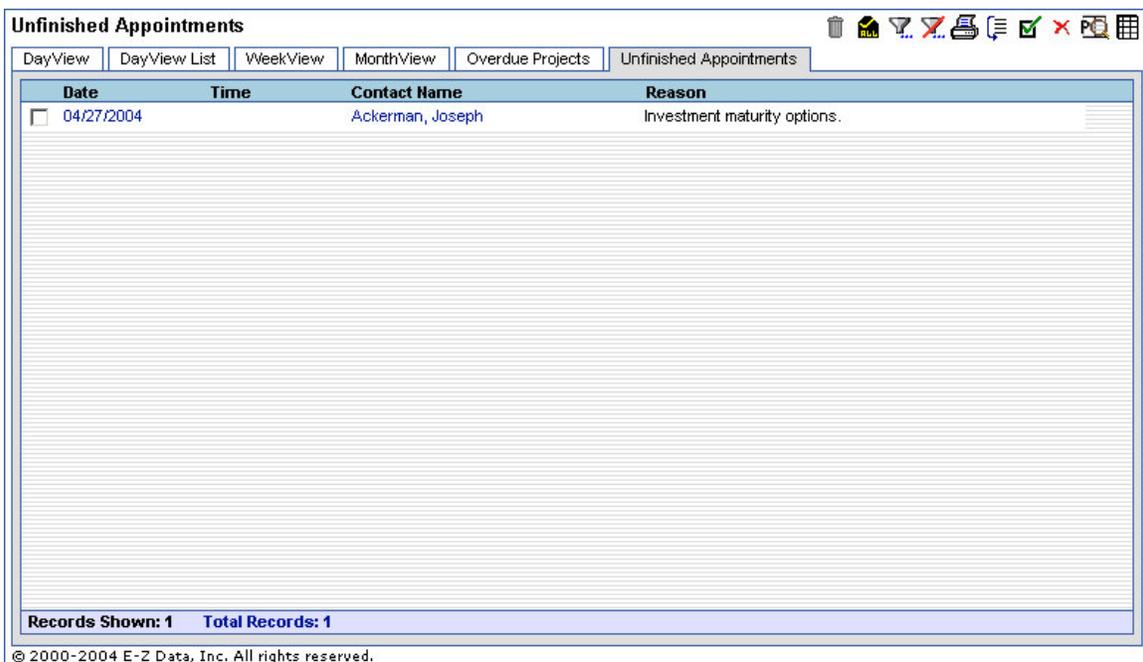In addition, the unfinished appointment has been copied to the **Unfinished Appointments** tab.

Figure 7: Wednesday April 28 Unfinished Appointments tab.