Fast-Class File

Client Data System

Volume 95: Important Dates Posting

The Important Dates Posting utility allows you to create activities relative to critical dates captured in CDS, such as a contact's date of birth, policy renewal, or investment maturity.

To create activities using the Important Dates Posting tool:
- From an open calendar view, click **Tools** in the main menu.
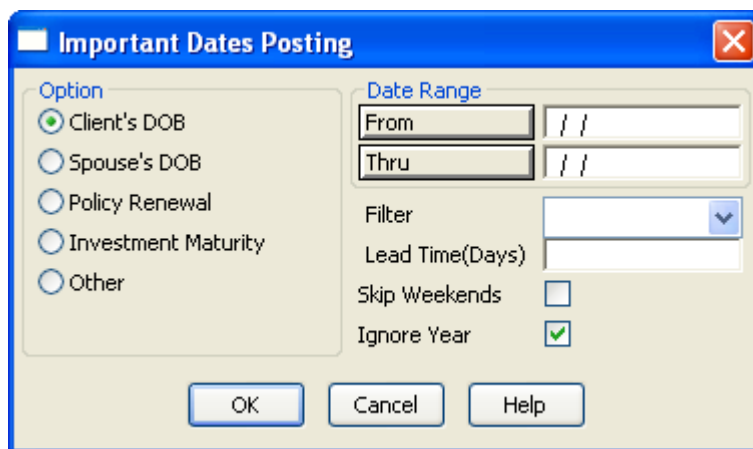- Select **Important Dates Posting** from the Tools menu.

Figure 1: Important Dates Posting dialogue window

- From the **Options** section in the Important Dates Posting dialogue window, choose the dated option you would like to create activities in relation to.

*Note: For example, to create activities for all contacts who have a birthday coming up in the month of November, select **Client's DOB** in the Options section.*
- Select the date range by clicking the From and Thru buttons.

*Note: For example, choose November 1st in the **From** field. Choose November 30th in the **Thru** field.*
- If needed, add a **filter** from the filter drop-down.
- Add the number of days in advance you would like to schedule your activity, before the occurrence of the dated option.

Note: For example, add '10' in the Lead Time field to have CDS schedule an activity ten days before a contact's birthday as a reminder to send a birthday card.
- Check **Skip Weekends** to have CDS avoid scheduling activities on a Saturday or a Sunday.
- Check **Ignore Year** to have CDS look for the anniversary of the dated option and not the original date itself.
- Click **OK**.
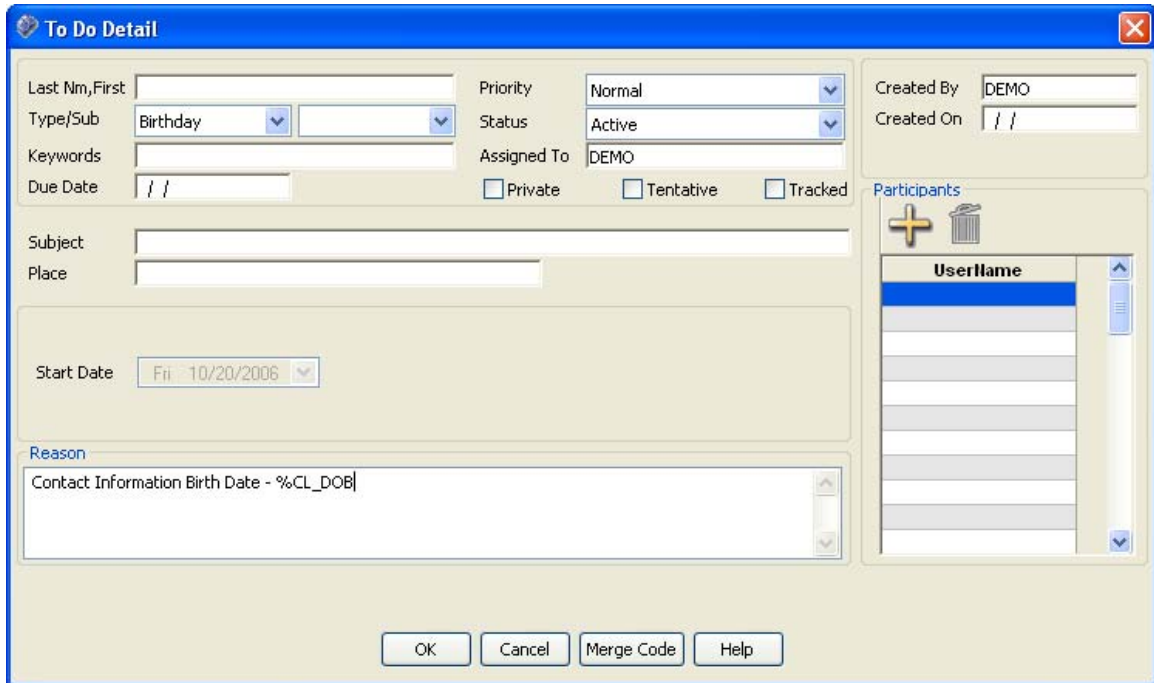- CDS opens a **To Do Detail** window.

Figure 2: To Do Detail window

- Enter relevant information in the reason field.
- Click inside the reason field and click the **Merge Code** button to launch the merge code browser.

Note: For example, you can add a preferred greeting merge code so when it comes time to send your contact a birthday card you can send it to the contact's preferred greeting.

- The 'Last Name, First Name' field and the Start Date drop-down will be grayed out and later populated with information meeting your Important Dates posting criteria.
- When finished entering your information, click **OK**.