

SmartCalendar
User Guide

SmartOffice[®]



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Introduction

Activities are tasks performed when contacting customers through letters, appointments or calls and can be created for you, someone else, or to share. Every individual and business must plan their day-to-day business and personal activities in order to effectively increase performance and operational effectiveness.

SmartOffice®, with its unique SmartCalendar, provides an easy, efficient and intelligent way to plan, manage and execute activities. Activity records in SmartOffice enable users to record and monitor these activities with ease. By scheduling an activity for an Individual or a Business, one can easily track the happenings associated with that activity, receive a reminder for the activity, view the activity details, view related individual or business contact information, record the outcome, reschedule the activity and mark the activity as discontinued when applicable.

The SmartCalendar also helps to make better use of an individual's time by devoting time to important activities by prioritizing. In addition to placing these activities on a Calendar for quick and organized reference, a user can also automate the creation of recurring activities, use a system of outcome reporting upon completion of activities, run reports and perform statistical analysis of the efficiency of the efforts based on the reported outcomes.

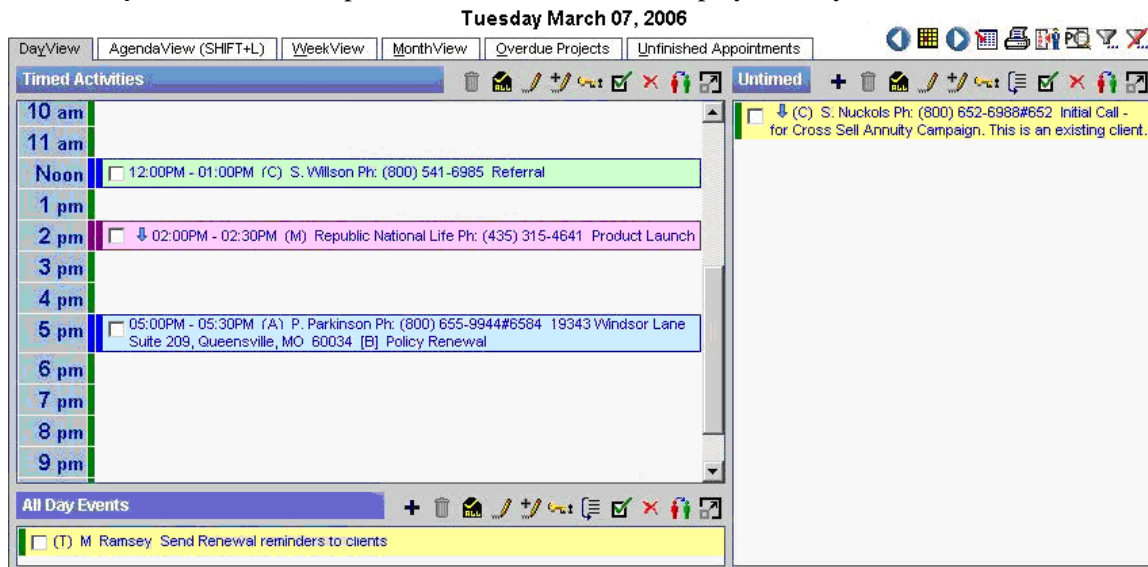
Calendar

The four Calendar views:

- DayView
- AgendaView
- WeekView
- MonthView

DayView

Select **DayView** from the expanded **Calendar** menu to display the DayView calendar.



The DayView calendar is divided into three sections, Timed Activities, Untimed and All Day Events. If a specific time was entered at the creation of the activity, it is designated as a Timed activity and will be displayed in the Timed Activities section. If the Untimed checkbox is selected at the time of creating the activity, the activity is classified as an untimed activity and is shown in the Untimed section of the DayView calendar. Activities with the All Day Events checkbox selected in the Activity Detail are classified as all day event activities and are shown in the All Day Events section of the DayView calendar.

Each of the three sections of the DayView calendar can be resized to occupy the available area in the DayView calendar using the Maximize/Restore the Component button shown in the respective toolbars.

All activities created from the Activities section are of the Appointment type by default. The default duration is 30 minutes. Activities created from the Untimed and All Day Events sections are of the Call type by default.

Reassign Contact

Activities created for a contact can be assigned to another contact using this button. While rescheduling, all of the details of the activity are preserved. Activities created for an Individual contact can be reassigned to a Business contact without losing any of the activity details and vice versa. The activity notes and the SmartPad notes related to this activity are moved from the Source contact to the Target contact. Reassign Contact will re-establish activity creation notes to the newly selected contact record. This action will not change the participant list members selected for the source contact. Note that the SmartPad and Activity notes are not saved while trying to reassign an activity to a contact that does not exist in the Database. Activities can be reassigned from all Calendar views using this button.

Changing Dates

The toolbars of all calendar views display the Previous, Today, Date and Time, and Next buttons.

- **Previous:** The Previous button moves the particular view one unit back. For example, for the DayView, this button moves the Calendar view one day prior.
- **Next:** The Next button advances the view one unit ahead.
- **Today:** The Today button returns the view to the present or the most contemporary time unit.
- **Date and Time:** Opens the Calendar tool so that any particular day of any year can be selected as the time displayed in the Calendar view.

DayView Interval

The Time Intervals in the Activities section of the DayView can be changed as necessary to 10 minute, 15 minute, 30 minute, or 1 hour intervals.

1. Select **User Preferences** from the **User Setup** expanded menu to display the Basic Info tab.
2. Select the **Activity/E-mail Options** tab.
3. In the Calendar Options section, select the appropriate interval from the DayView Time Interval drop-down list.

AgendaView

Select **AgendaView** from the **Calendar** expanded menu to display the AgendaView. Selecting the AgendaView tab from other calendar views can also access the AgendaView and this view can be accessed from any spreadsheet using the shortcut key (Alt + Shift + L).

The AgendaView displays all timed, all day event and un-timed activities created for a particular date in a spreadsheet. By customizing the layout of the spreadsheet, a user can display all the applicable information regarding the activity record and the related contacts, providing a simple and efficient means to view all information related to an activity.

The Date Ranges drop-down list helps to view activities for a pre-set date range. The choices included in the Date Ranges drop-down list are:

Date Range	Description
Today	This option is used to filter out all events from the Current Day of the Current Month and Year
After 1 Month	This option is used to filter out all events after 1 Month from the Current Day of the Current Month and Year
After 1 Year	This option is used to filter out all events after 1 Year from the Current Day of the Current Month and Year
After 12 Months	This option is used to filter out all events after 12 Months from the Current Day of the Current Month and Year
After 15 Days	This option is used to filter out all events after 15 Days from the Current Day
After 2 Months	This option is used to filter out all events after 2 Months from the Current Day of the Current Month and Year
After 2 Weeks	This option is used to filter out all events after 2 Weeks from the Current Day of the Current Month and Year

After 2 Years	This option is used to filter out all events after 2 Years from the Current Day of the Current Month and Year
After 3 Months	This option is used to filter out all events after 3 Months from the Current Day of the Current Month and Year
After 30 Days	This option is used to filter out all events after 30 Days from the Current Day
After 6 Months	This option is used to filter out all events after 6 Months from the Current Day of the Current Month and Year
After 60 Days	This option is used to filter out all events after 60 Days from the Current Day
After 7 Days	This option is used to filter out all events after 7 Days from the Current Day
After 9 Months	This option is used to filter out all events after 9 Months from the Current Day of the Current Month and Year
Before 1 Month	This option is used to filter out all events before 1 Month from the Current Day of the Current Month and Year
Before 1 Year	This option is used to filter out all events before 1 Year from the Current Day of the Current Month and Year
Before 12 Months	This option is used to filter out all events before 12 Months from the Current Day of the Current Month and Year
Before 15 Days	This option is used to filter out all events 15 Days before the Current Day
Before 2 Months	This option is used to filter out all events before 2 Months from the Current Day of the Current Month and Year
Before 2 Weeks	This option is used to filter out all events before 2 Weeks from the Current Day of the Current Month and Year
Before 2 Years	This option is used to filter out all events before 2 Years from the Current Day of the Current Month and Year
Before 3 Months	This option is used to filter out all events before 3 Months from the Current Day of the Current Month and Year
Before 30 Days	This option is used to filter out all events 30 Days before the Current Day
Before 6 Months	This option is used to filter out all events before 6 Months from the Current Day of the Current Month and Year
Before 60 Days	This option is used to filter out all events 60 Days before the Current Day
Before 7 Days	This option is used to filter out all events 7 Days before the Current Day
Before 9 Months	This option is used to filter out all events before 9 Months from the Current Day of the Current Month and Year
Current Month	This option is used to filter out all events from the Current Month of the Current Year
Yesterday	This option is used to filter out all events a Day before the Current Month

	and Year
Month-to-Date	This option is used to filter out all events from the beginning of the Current Month to the Current Day
Year-to-Date	This option is used to filter out all events from the beginning of the Current Year to the Current Day
Previous 7 Days	This option is used to filter out all events 7 days before the Current Day of the Current Month and Year
Previous 30 Days	This option is used to filter out all events 30 Days before the Current Day of the Current Month and Year
Previous Week	This option is used to filter out all events a Week before the Current Day of the Current Month and Year
Previous Month	This option is used to filter out all events from the Last Month of the Current Year
All Events in Past	This option is used to filter out all events before the Current Day of the Current Month and Year
Tomorrow	This option is used to filter out all events on the Next Day
Next 7 Days	This option is used to filter out all events for the Next 7 Days
Next 30 Days	This option is used to filter out all events for the Next 30 Days
Next Week	This option is used to filter out all events from the Next Week of the Current Month and Year
Next Month	This option is used to filter out all events from the Next Month of the Current Year
All Events in Future	This option is used to filter out all events after the Current Day of the Current Month and Year
Current Week	This option is used to filter out all events from the Current Week of the Current Month and Year
Current Year	This option is used to filter out all events from the Current Year
Before 45 Days	This option is used to filter out all events 45 Days before the Current Day
After 45 Days	This option is used to filter out all events after 45 Days from the Current Day

All activities created from the AgendaView calendar will be untimed by default. The default Activity Type will be Call. The Previous Day, Today, Next Day and Date and Time buttons are shown in the AgendaView toolbar only if **Today** is selected in the Date Range drop-down list.

Tuesday March 07, 2006

Date Ranges: Today

Type	Status	Sub-Type	Mark Done	Contact Name	Full Phone	Subject/Reason	Latest SmartPad Notes	Acted On
<input type="checkbox"/> Call	Active		<input checked="" type="checkbox"/>	Nuckols, Sausha L.	(800) 652-6988#652	Initial Call - for Cross Sell Annuity Campaign. This is an existing client.		
<input type="checkbox"/> Call	Active		<input checked="" type="checkbox"/>	Willson, Sam	(800) 541-6985	Referral		03/07/2006 04:26PM
<input type="checkbox"/> Meeting	Active		<input checked="" type="checkbox"/>	Republic National Life	(435) 315-4641	Product Launch		03/07/2006 04:20PM
<input type="checkbox"/> Appointment	Active		<input checked="" type="checkbox"/>	Parkinson, Pricilla	(800) 655-9944#6584	Policy Renewal		
<input type="checkbox"/> To Do	Active		<input checked="" type="checkbox"/>	Ramsey, Martina		Send Renewal reminders to clients		

Records Shown: 5 Total Records: 5

Calendar dynamic reports can be generated from the AgendaView spreadsheet with the use of the Run Dynamic Report button.

WeekView

Select **WeekView** from the **Calendar** expanded menu to display the WeekView. The WeekView can also be accessed by selecting the **WeekView** tab from other calendar views. The WeekView calendar displays all activities that were created for a particular week. Only workdays are displayed in the WeekView by default. Click the **View Seven Day Week** button to display the WeekView for all seven days of the week. Use the various Date buttons to display the appropriate week. Only timed and all day event activities are displayed in the WeekView. The WeekView calendar is divided into two sections, Activities and All Day Events. The Timed Activities will be shown in the Activities section and the all day event activities are shown in the All Day Events section.

For activities spanning more than a single day, clicking anywhere on the activity calendar will highlight the entire calendar area indicating the multi-spanning. By clicking anywhere on the WeekView calendar, the highlight will be stopped.

All activities created from the WeekView calendar will be timed Appointment activities by default with the Start Time as 7:00 AM.

March 6 - 10, 2006

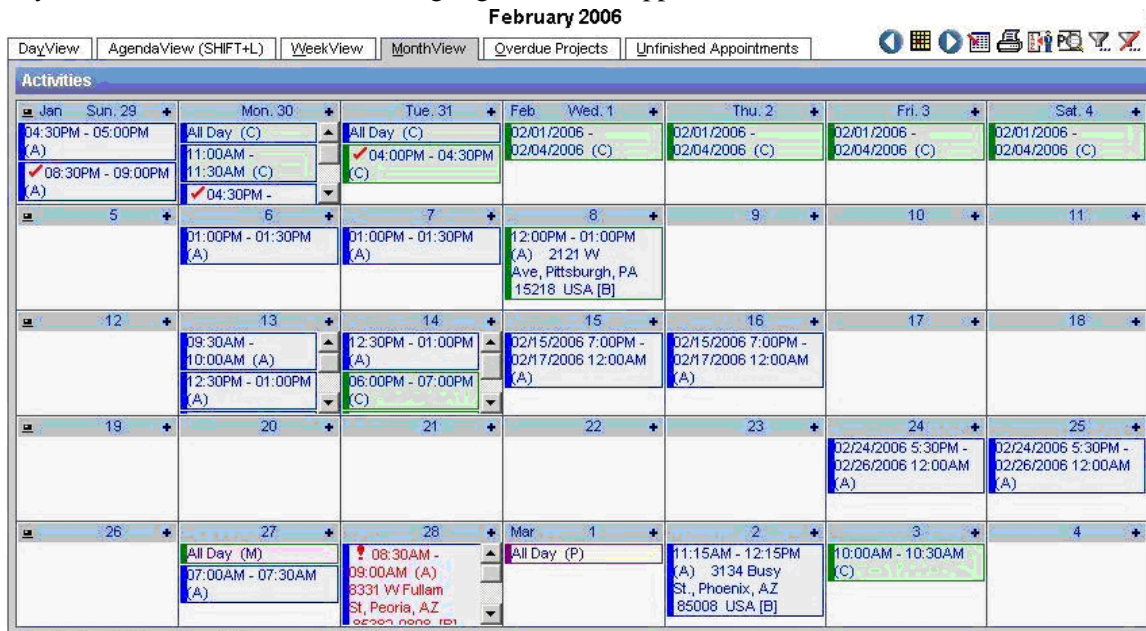
Time	6 Mon.	7 Tue.	8 Wed.	9 Thu.	10 Fri.
Noon		<input type="checkbox"/> 12:00PM - 01:00PM (C) S. Willson			
1 pm					
2 pm		<input type="checkbox"/> 02:00PM - 02:30PM R. Parkinson			
3 pm				<input type="checkbox"/> 03:00PM - 03:30PM (A) Standard Coverage	
4 pm					
5 pm		<input type="checkbox"/> 05:00PM - 05:30PM (A) D. Parkinson			
All Day Events					
		<input type="checkbox"/> (T) M. Ramsey			

MonthView

Select **MonthView** from the expanded **Calendar** menu to display the MonthView calendar. The MonthView can also be accessed by selecting the **MonthView** tab from other calendar views. The MonthView displays all activities that were created for a particular month. Use the various Date buttons to display the appropriate month. Only the timed and all day event activities will be shown in the MonthView. The all day event for any date will be shown in the top of the particular date's section with an All Day Event indicator.

The activities created from the MonthView calendar will be of the All Day Event type by default and the Show Time As field will display Free by default.

For activities spanning for more than a single day, clicking on the color background of the activity will highlight the entire activity calendar indicating the multi-spanning. By clicking anywhere on the MonthView, the highlight will be stopped.



Navigation between Calendar Views

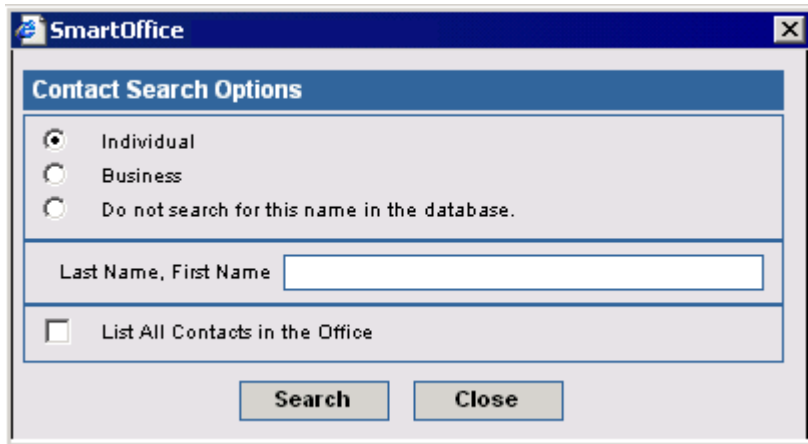
A user can easily navigate between calendar views. From the MonthView, click the **Go to WeekView** button to display the WeekView; or, click the **Go to DayView** hyperlink to display the DayView. Click the **Go to DayView** hyperlink from the WeekView to display the DayView. The DayView, WeekView and MonthView calendars will resize freely depending on the window size set by the user.

Adding Activities

Add an Activity from the DayView

1. Select **DayView** from the **Calendar** expanded menu.
2. Click on the applicable time hyperlink to open the Contact Search Options dialog box.
3. Enter the appropriate search criteria and then click the **Search** button.
4. Based upon the selected contact type and search criteria, the corresponding Contact List displays.
5. Select the contact by clicking on the applicable Contact Name hyperlink.
6. Enter the required information in the Activity Detail dialog box and then click the **OK** button to add the activity to the calendar.

Contact Search Options

The image shows a screenshot of a software dialog box titled "SmartOffice" with a sub-header "Contact Search Options". Inside the dialog, there are three radio button options: "Individual" (which is selected), "Business", and "Do not search for this name in the database.". Below these options is a text input field labeled "Last Name, First Name". At the bottom of the dialog, there is a checkbox labeled "List All Contacts in the Office" which is currently unchecked. Two buttons, "Search" and "Close", are located at the bottom right of the dialog box.

- Select the **Individual** option and then enter the applicable search criteria to create an activity for an Individual contact.
- Select the **Business** option and then enter the applicable search criteria to create an activity for a Business contact.
- Select the **Do not Search for this name in the database** option to add an activity for a contact that is not in the database.

Different Ways to Add an Activity

- Click the **Add a New Activity at [TIME]** hyperlink in the DayView.
- From the AgendaView, click the **Add** button.
- From the WeekView, click the **Create a New Calendar Activity** button on today's date.
- From the MonthView, click the **Create a New Calendar Activity** button on today's date.
- From the Opportunities tab of an individual contact, select the **Activities** sub-tab and then click the **Add** button.
- From the global toolbar, click the **Create a New Calendar Activity** button.
- From the contact's Activity Calendar, click the **Add a New Activity** button.
- From the To Do section of the DayView, click the **Add a New To Do Item** button.
- From the Pending Case Summary, select the **Activity/Mail** tab and then click the **Add** button.
- From the Account Master Summary, select the **Activity/Mail** tab and then click the **Add** button.
- From the Global Individual Policy Summary, select the **Activity/Mail** tab and then click the **Add** button.
- Tag an activity created for a user and then click the **Add an Activity** button.

Activity Characteristics

Activity Detail

The screenshot shows the 'SmartOffice' application window with the 'Activity Detail' form. The form is organized into several sections: 'Contact' (Name: Maureen Iverson, Created By: Admin, Created On: 02/28/2006 11:59AM), 'Activity Detail Information' (Start Date/Time: 03/02/2006 11:15AM, End Date/Time: 03/02/2006 12:15PM, Address: 3134 Busy St., Phoenix, AZ 85008 USA, Type/Sub-Type: Appointment, Keywords: Policy, Priority: Normal, Status: Active, Show Time As: Busy, Remind Before, Tracked: [checked], Private: [unchecked], Due Date), 'Participants' (List: Admin), and 'Reason' (Text: Zen Life Product - Launched recently - need to get the product information brochures). The bottom of the window features buttons for 'OK', 'Save', 'Options', and 'Cancel'.

Contact Section

The Contact Section includes the name of the contact for which the activity is to be created. A user can add an activity for Individual Contacts, Business Contacts and Individual Contacts that do not exist in the database.

View the contact details by clicking the **Name** hyperlink. The Created By and Created On fields are read-only and automatically populate with the user who creates the activity and the date and time the activity is created.

Participants Section

The Participants section is used to display the names of all users related to a particular activity. By default, the user who creates the activity for any contact will be a participant for that particular activity.

The Creator can designate the additional participants for the activity and change the Primary Participant of the activity. The activity has at least one Primary Participant and can have one or more Secondary Participants. A user can add other users as participants based on the Proxy rights or access rights over the contact and one who has the status as either 'Active' or 'Temporary Password'. A Primary Participant user can be deleted from the Participant List, as long as there is at least one participant remaining in the list.

The Participants list includes all the users in the current office, who are directly assigned to the contact, excluding the AdvisorVu users.

Add a Participant

By default, the creator is the Primary Participant and there are no secondary participants. This is indicated by the appearance of the creator's name. Participants are added by clicking the **Add** button on the Participants List toolbar.

1. Click the **Add** button in the Participants section.
2. In the Available Users List dialog box, select a participant and then click the **OK** button.

The list of participants shown in the Available Users list dialog box depends upon the office settings. Please refer to *Appendix A* for a detailed explanation of different office settings.

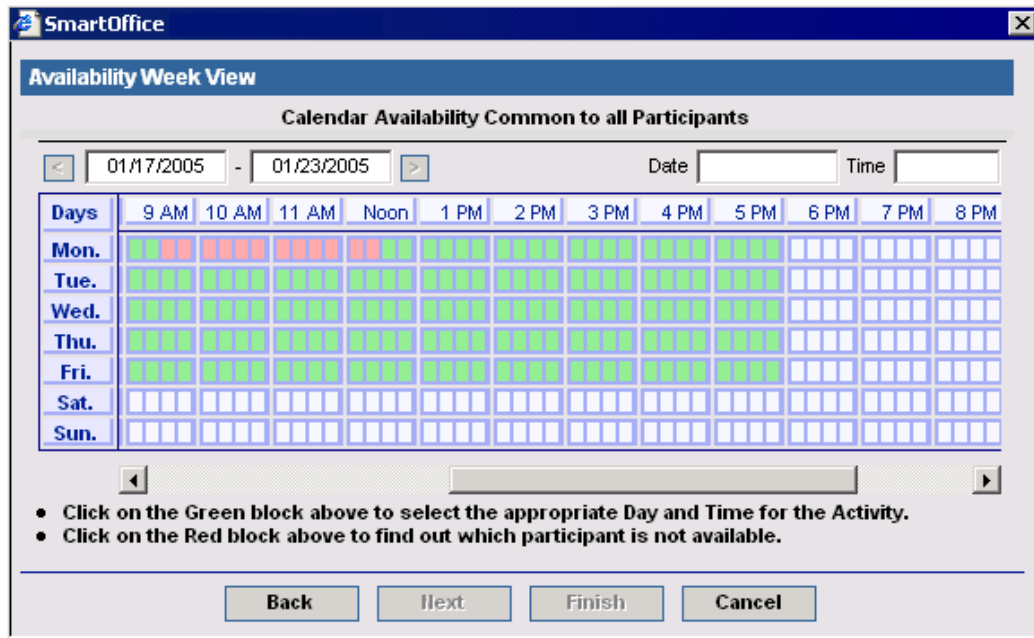
Select a Primary Participant

In order for the Creator to designate a user other than him/herself as the Primary Participant, the Creator must first add secondary participants.

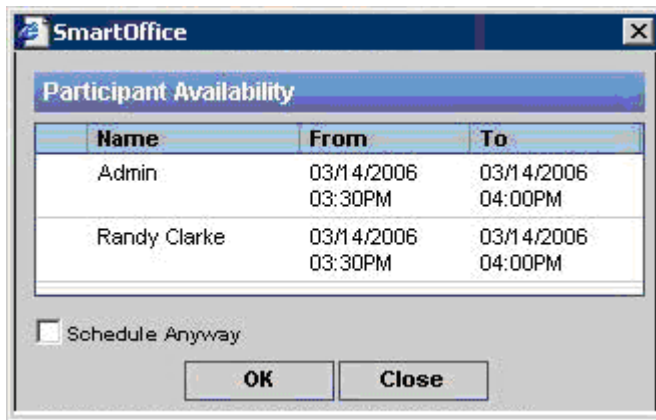
1. Tag a participant in the Participant section.
2. Click the **Mark User as Primary Participant of this Activity** button to display the Primary Participant in Bold.

Find the Schedule of Participants

1. Add the participants in the Participants section and then enter the duration of the activity.
2. Click the **Check Participant(s) Availability** button in the Participants section.
3. Specify the From date in the Check Availability Options dialog box. (The From date should not be earlier than today's date). The **To** date field will be automatically calculated as the 7th day from the date entered in the From field and will be shown always in a non-editable mode. The Participants availability can be seen only for a time range of one week from the date entered in the From field.
4. Specify the **From** and **To** times. The default range is 9:00AM to 6:00PM. Deleting the time values in the From and To fields enables a user to view the time slots for the entire day.
5. The time duration value entered in the Activity Detail dialog box is populated automatically in the Duration field.
6. Selecting the Skip Weekends option enables the user to find the Participants' availability during weekdays only.
7. Enter the required information and then click the **Next** button to view the schedule of the Participants added in the Activity Detail dialog box.
 - Red blocks in the Availability WeekView represent the busy time of the participants.
 - Green blocks in the Availability WeekView represent the free time of the participants.



8. The Participant Availability dialog box opens when a red block is selected to display the participants that are shown as busy. This dialog box displays the name of the participants and the period of time during which they are busy.



9. If a user wants to schedule the activity for the same time when the participant is busy, select the **Schedule Anyway** option to create the activity. Selecting a green block schedules the activity during the specified free time of the participants.
10. The selected time is updated in the Date and Time field of the Availability WeekView dialog box. Click the **Finish** button to update the selected date in the Activity Detail dialog box.

Activity Detail Information Section

Date/Time

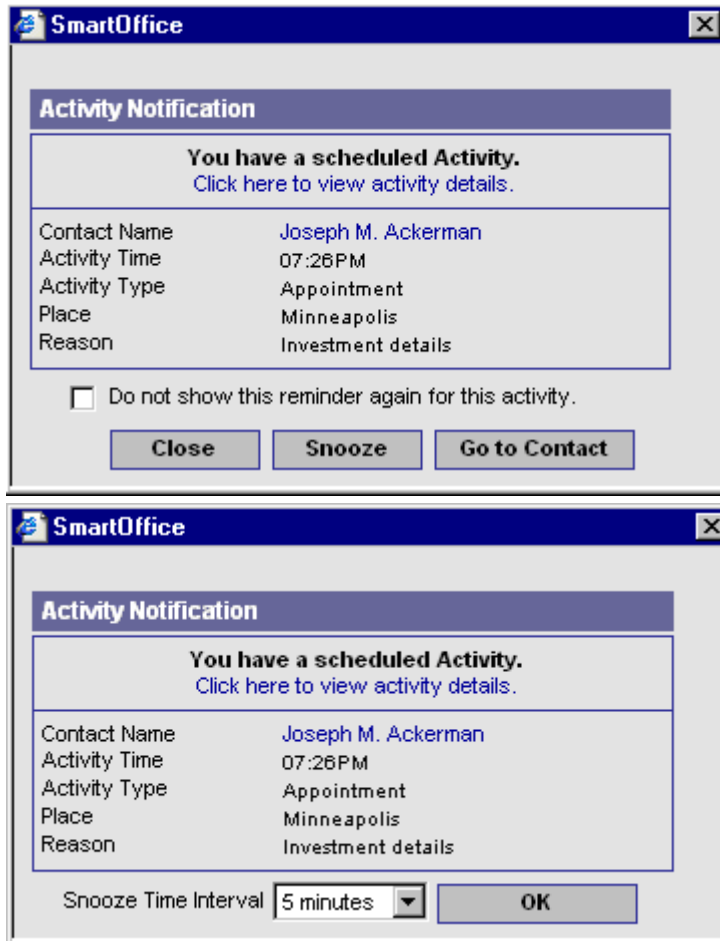
By default, the Date and Time is shown in the MM/DD/YYYY format. The User Preferences Basic Info tab enables a user to change the default Date Format. The various Date Formats available are:

- dd/MM/yyyy.
- MM/dd/yyyy.
- MMM.d,yyyy.
- yyyy/MM/dd.

A user can select the Date and Time for the activity either by using the Date and Time selection button or by manually entering the Date and Time in the respective fields. The Due Date field is disabled for timed Appointment, Call, To Do and Personal types of activities. The Due Date field is enabled only for the Project type of activities. The Sub-Type field is shown as blank by default.

Reminder

The Remind Before notification displays in a dialog box with an audio cue before the time specified in the Remind Before field of the Activity Detail dialog box. Reminders can be set for all types of activities (e.g., Timed, Untimed and All Day Event types of activities).



A user can view the details of the activity by clicking the **Click here to view activity details** hyperlink. This opens the Activity Detail dialog box of the activity for which notification is displayed. The details of the contact can be viewed by clicking the Contact Name hyperlink or by moving to the Contact Detail page by clicking the **Go to Contact** button. If the **Do not show this reminder again for this activity** option is selected, the notification for that particular activity will not display again.

Snooze

The Snooze button enables the Activity Notification to be prompted again for the Snooze Time Interval selected. The Snooze Time Interval can be set to 5 minutes, 10 minutes, 15 minutes, 30 minutes, 45 minutes or 60 minutes.

User Preferences for Reminder

Default settings for reminders are set in User Preferences. The value in the Remind Before field is based upon a user's activity preferences in User Preferences. These User Preferences can be overridden by specifying a value in the Remind Before drop-down list in the Activity Detail dialog box.

Start & End Date/Time

The Start Date and Start Time fields are used to specify the start time for the activity that is to be scheduled for any particular date. The Duration for the activities can be automatically calculated by selecting the preset time ranges that are shown in the End Time drop-down list. The User can also manually enter the End Date and Time using the Pick Date and Time button, shown next to the End Date field.

For timed activities, the default time span is 30 minutes.

Address

The Address field provides the option to specify the location of the activity. The location can be entered through the Address field manually or by selecting an address through the Address hyperlink that opens the list of available addresses for that particular contact. The Address field will show the full address along with an indicator for the Address type. The Map button, shown next to the Address field will display the location of the activity in a new window. The Map button will open the Yahoo! Maps search results page in a new window, pointing to the selected address shown in the Address field.

Subject

The Subject field provides the space to type the description of the activity.

Reason

The Reason field provides space to enter the main reason or the objective for the activity that is to be created in detail. The reason field is HTML enabled. A user can customize the text entered in the Reason field with different colors and fonts for easy identification and tracking.

Keywords

The Keywords field is used to specify the keywords for the created activity.

Activity - Types

The following table describes the types of Activities in the Calendar.

Activity Types	Description
Appointment	An Appointment type of activity is scheduled when there is an arrangement for a meeting or casual discussion.
Call	A Call activity can be an appointment made or a formal/casual message delivered over the phone. A call type activity can be linked to a telemarketing script.
Meeting	A Meeting type of activity is scheduled when there is an appointment to meet a group of people or when there is a need to participate in a group discussion.
Personal	A Personal activity is used to manage and record the personal activities of a user. There are no tracking options for personal activities. The Tracked option in the Activity Detail dialog box is disabled when a user selects the activity type as Personal.
Project	A Project activity is a type of activity where the activity or happening takes place over a period of time (e.g., a new product release).
To Do	A To Do activity is a list of tasks to be performed on a particular date but the activities are not dependent upon time.

Activity Sub-Types and Applicable Types

The following table describes the activity sub-types and the applicable activity types.

Applicable Types	Sub-Types	Description
Appointment/Call/Meeting	Anniversary	Yearly date commemorating a special event.
Appointment/Call/Project/Meeting	Annual Review	Review the number of people who ultimately became clients over a period of time.
Appointment/Call/Meeting	Approach/New Seen	Initial face-to-face contact with a Prospect or Suspect during which first impressions are created.
Appointment/Call/Personal/To Do/Meeting	Birthday	Scheduled contact with the Prospect or Client to set up a birthday lunch, telephone call or birthday card.
Appointment/Meeting	Business Meal	Business meals with business executives, business owners and professionals.
Project	Business Development	Activity scheduled for the development of the business.
Appointment/Call/Project/Meeting	Case Development	Activity scheduled for development of an account or client.
Appointment/Call/Meeting	Closing	Advisor helping the customer with a purchase decision.
Appointment/Call/Project/Meeting	Conference	Schedule to invite a prospect or client or a business entity for a group meeting.
Appointment/Call/Project/Meeting	Fact Finding	Activities related to Fact Finding interviews for the client and updating the facts of the client.
Appointment/Call/Meeting	Follow-up	Activity scheduled to follow-up on a particular happening.

Appointment/Call/Meeting	Initial	The first scheduled meeting to discuss the prospect of a sale.
Project/To Do/Meeting	Internal	
Appointment/Call/Meeting	Interview	
Project/To Do	Letter	
Project/To Do	Mailing	
Project/To Do	Marketing	Activity scheduled to market products.
Appointment/Call/Meeting	Maturity (Investment)	Activity related to the maturity date of an investment.
Appointment/Call/Project/Meeting	Meeting	
Appointment/Call/Project/Personal/Meeting	Personal	
Appointment/Call/To Do/Meeting	Pol.Delivery	Activity related to Policy delivery.
Project	Professional Development	
Appointment/Call/Meeting	Renewal (Policy)	Activity related to the renewal date of the policy.
Appointment/Call/Project/Meeting	Sales	
Appointment/Call/Meeting	Schedule	
Personal	Sick	
Appointment/Call/Project/To Do/Meeting	Service	
Call/To Do/Meeting	Telemarketing	
Appointment/Call/Project/Meeting	Training	
Appointment/Personal/Meeting	Travel	
Personal	Vacation	



Custom Choices in Keywords/Types/Sub-Types

The Custom Choices option enables users to define Activity Types, Activity Sub-Types and Keywords for an efficient tracking of activities when needed.

This functionality is available only when the specific Choice Customization User Role is provided.

Activity Priority





An activity can be prioritized based on its importance in order to address the activities that need to be taken care of immediately.

Activity Priority	Description
Normal	An activity without any priorities over the other activities. A Normal activity is represented by a <i>Blue</i> color in the various calendar views.
High ()	Tasks that need to be taken care of immediately and urgently can be prioritized as High Priority activities. These activities are represented by a <i>Red</i> color in the calendar views. These activities will be symbolized by a Red exclamation in the activity real estate area.
Low ()	An activity that can be taken care of with the least importance over the other activities can be prioritized as Low. These activities are shown in a blue color in the various calendar views. A Blue arrow pointing downwards will symbolize these activities.

By default, any created activity will be of Priority – Normal and a prioritized activity will have a sign to denote that the activity has been prioritized. The Font color for activities with High Priority is shown as *Red*.

Activity Show Time As

The status of the user at the time of planning the activity can be specified using the Show Time As drop-down list. Each of the Activity Show Time As options has color indicators for easy visualization of the activities in the DayView, WeekView and MonthView calendars.

Activity Show Time As	Description
Busy	This option is used to specify that the User will be busy with this activity for the specified duration. The color indicator for Busy is <i>Blue</i> 
Free	This option is used to specify that the user will be free during the duration time for the scheduled activity. The Color indicator for Free is <i>Green</i> 
Out of Office	This option is used to specify that the user will not be available in the Office during the specified duration. The color indicator for Out of Office is <i>Purple</i> 
Tentative	Activities that might change its importance over the course of time can be prioritized as Tentative. The Color indicator for Tentative is <i>Gray</i> 

In the DayView, WeekView and MonthView calendars, respective Show Time As options for individual activities will represent the activities through the color indicators, displayed just before the respective activities.

Activity Due Date

The Activity Due Date is a user defined date field. This is not a mandatory field and based on the date specified by the user, the active Project type of activities, which are not completed, will be moved to the Overdue Projects section and the active Appointment, which is not a complete activity, will be moved to the Unfinished Appointments section.

Activity Status

Activity Status	Descriptions
Active	Activity Scheduled is active.
Discontinued	Activity scheduled is discontinued or cancelled.
Done	Activity scheduled is completed.

Mark an Activity as Done

- Select **Done** from the Status drop-down list in the Activity Detail dialog box.
- Tag an activity and then click the **Mark Activity Done** button available in the DayView, AgendaView, WeekView, MonthView, Unfinished Appointments, Overdue Projects and Contact Activity Calendar tabs.
- Tag a contact and then click the **Activity Outcome** button in the Individual/Business contact Summary toolbar.
- Tag an activity and then click the **Make/Receive a Phone Call** button in the Global toolbar.
- Tag an activity and then click the Timer buttons such as the **Start the Timer** or **Stop Timer/Hang up Phone** button on the global toolbar.

Mark an Activity as Discontinued

- Select the **Mark Activity Discontinued** button available in the DayView, AgendaView, WeekView, MonthView, Unfinished Appointments, Overdue Projects and Contact Activity Calendar toolbars.
- Select **Discontinued** from the Status drop-down list in the Activity tab of the Activity Detail dialog box.

For a non-eOCS licensed user, the Status for activities marked as Done can be changed to Active or Discontinued.

Activity Tracking

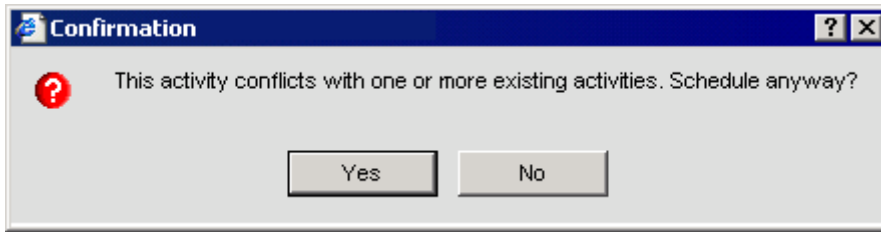
Select the **Tracked** option in the Activity Detail dialog box to enable a user to efficiently track activities. Tracking options help to view the history of the activity.

User Preferences for Activity Tracking

Change the default setting for activity tracking when a new activity is created based upon preference. If the **Disable default activity tracking for new activities** option is selected in the User Preferences Activity/E-mail Options tab, whenever a new activity is created, the tracking option is not selected by default in the Activity Detail dialog box. If the **Disable default activity tracking for new activities** option is not selected in the User Preferences Activity/E-mail Options tab, whenever a new activity is created, the tracking option is automatically selected in the Activity Detail dialog box.

Activity Collision

By default, the Calendar will allow activities to overlap. Enabling the Activity Collision options warns the user of colliding activities.



When adding a new activity, a Confirmation dialog box opens. Click the **Yes** button to schedule the activity regardless of the collision; or, click the **No** button to return to the Activity Detail dialog box to select a different time for the activity.

User Preferences for Activity Collision

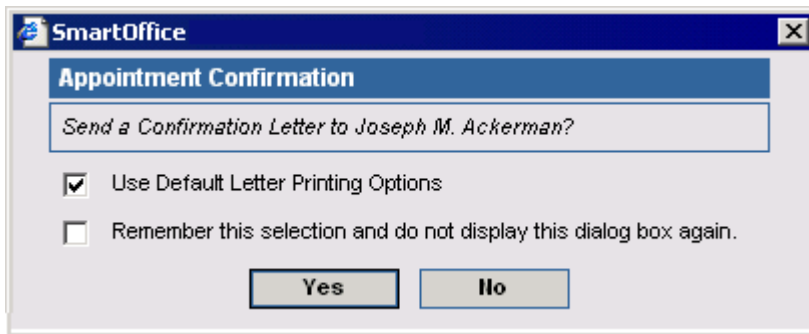
To enable the Activity Collision option:

1. Select **User Preferences** from the **User Setup** expanded menu to open the Basic Info tab.
2. Select the **Activity/E-mail Options** tab.
3. Select the **Check for Activity Collision** option and then click the **Save** button. By default, when a new user is created, the Check for Activity Collision option is selected.

All Active activities, which are not untimed and with the Show Time As specified as either Busy or Out of Office are included in the collision check.

Send a Letter

When an Appointment or Call activity is scheduled, a Confirmation message dialog box displays, prompting the user to send a confirmation letter to the contact regarding the scheduled activity. The Confirmation letter can be sent only for the Appointment and Call activity types. This letter can be modified to suit the needs of users.



- Select the **Use Default Printing Options** option in the Appointment Confirmation dialog box to enable the user to use the default letter printing options specified in the User Preferences. By default, this option is selected.
- Select the **Remember this selection and do not display this dialog box again** option so the Appointment Confirmation dialog box will not display while scheduling any new activities and the Confirmation letter is automatically sent. This behavior can be turned on or off from User Preferences.

User Preferences for Appointment Confirmation Letter

If the **Do Not Prompt for Appointment Confirmation** option is selected in User Preferences, the Appointment Confirmation dialog box, which prompts the user to send a confirmation letter to the contact for whom the activity is scheduled, will not open. As specified earlier, this can also be disabled by selecting the **Do not prompt for Appointment Confirmation Letter** option in the Appointment Confirmation dialog box.

Reschedule an Activity

Activities can be rescheduled to the past or future. Different ways in which activities can be rescheduled:

- Use the **Reschedule this activity** hyperlink from the DayView, AgendaView or WeekView. By clicking the **Reschedule this activity** hyperlink, the Date and Time Selection dialog box opens enabling the user to change the date and time.
- Use the **Modify this Activity** hyperlink in the DayView, AgendaView, WeekView or MonthView. By clicking this hyperlink, the Activity Detail dialog box displays, and by selecting the date and time from the Date and Time Selection dialog box, the activity is rescheduled.
- Use the **Reschedule Activity** button in the To Do section of the DayView, WeekView and Unfinished Appointments tabs.

While rescheduling an activity, the user is prompted to send an Appointment Confirmation letter to the contact. Through the Reschedule button, when an activity is rescheduled by explicitly changing only the Start Date/Time, the End Date/Time values are altered automatically in such a way that the original duration set for the activity is preserved.

Modify an Activity

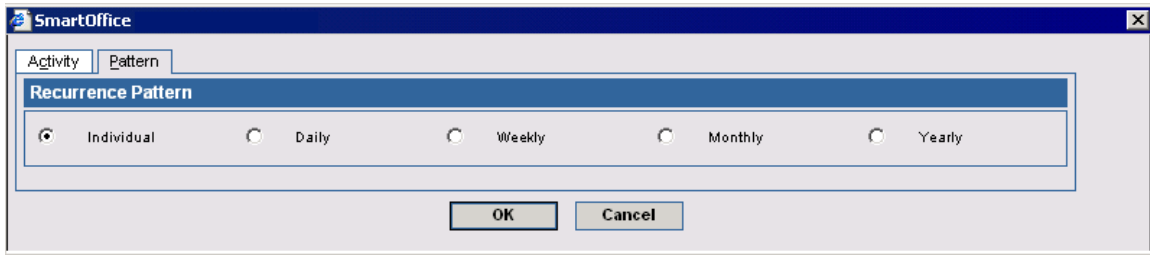
- Use the **Modify this Activity** hyperlink from the DayView, AgendaView, WeekView or MonthView calendars. This hyperlink is usually displayed with the type of activity abbreviated with its first letter enclosed within parenthesis. For example, the **(A)** hyperlink can be used to modify an Appointment activity.
Rescheduling the created activity to a future date and time, changing the priority type of a created activity and changing the status of an activity are all facilitated by the **Modify this Activity** hyperlink.
- In other areas of the calendar such as the Contact Activity Log or Global Policy Summary spreadsheet, etc., an activity can be modified using the Date hyperlink.
- From the DayView and MonthView, double-clicking the color background representing the activity will open the Activity Detail dialog box for modifying the details of the activity.

Delete an Activity

Tag the appropriate activity records and then click the **Delete Record(s)** button to remove the activities from the Calendar. Multiple activities can be deleted at the same time if the user is provided with the appropriate Mass Deletion user role.

Recurring Activities

The Pattern tab in the Activity Detail dialog box is used to create recurring activities.



By default, Individual is selected as the default Recurrence Pattern.

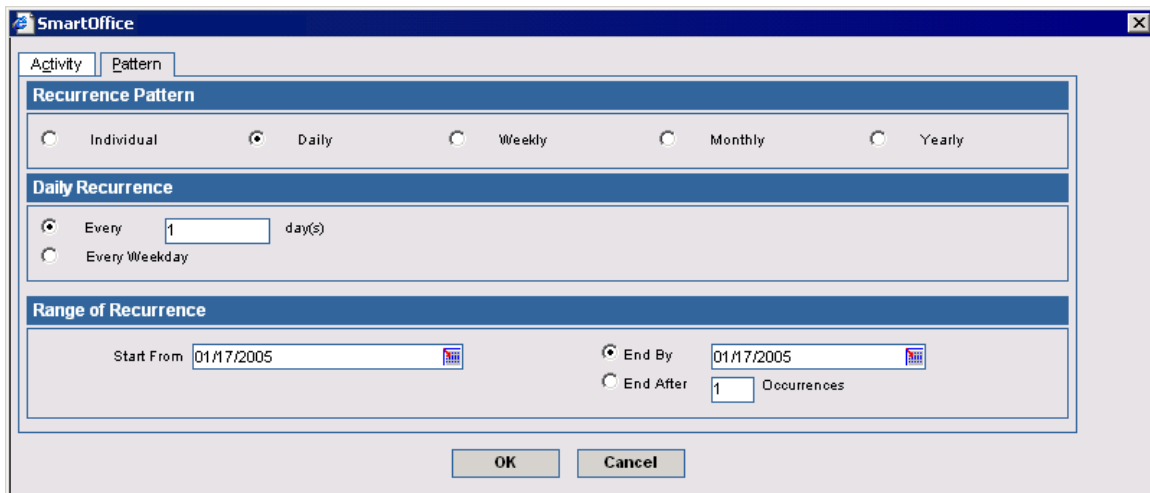
The recurring pattern options:

- Daily
- Weekly
- Monthly
- Yearly

When the recurrence pattern is changed from Individual to any other patterns mentioned above, the look up of the recurrence pattern is changed. The maximum number of Recurring Activities that can be created is 100. For example, when the Daily recurrence pattern is selected, the Pattern tab displays the Daily Recurrence and Range of Recurrence sections.

Daily Recurrence

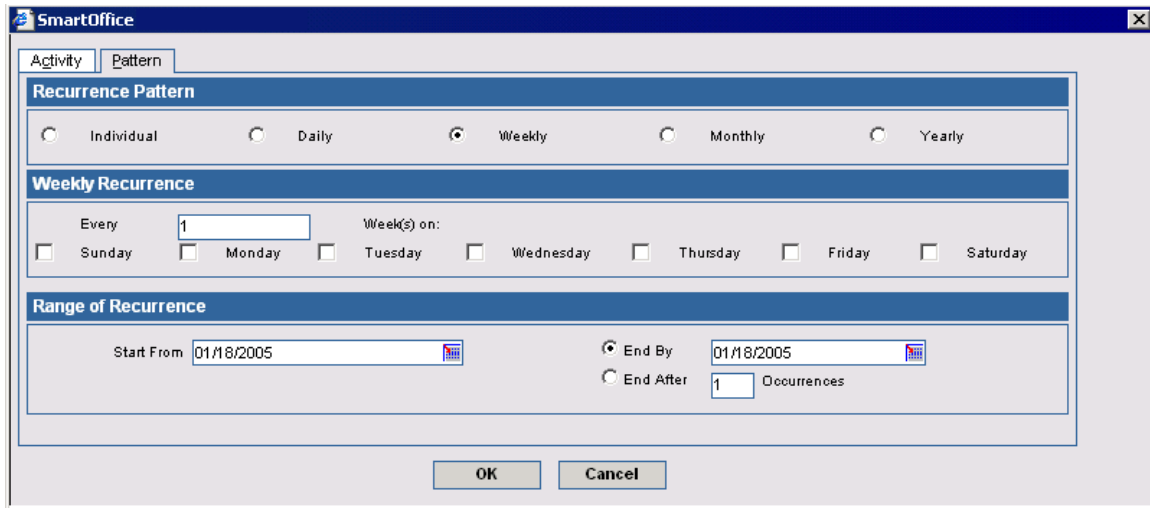
When the Daily recurrence pattern is selected, the Daily Recurrence and Range of Recurrence sections display.



A user can select between a recurring activity that is to happen over a particular period of time or an activity recurring every day except Saturdays and Sundays. In the Range of Recurrence section, by entering the start date for the recurrences in the Start From field and the end date in the End By field, a user can determine the number of times the activity will occur. By entering a value in the End After x Occurrences field, the user can specify the number of times that a particular activity will occur before ending.

Weekly Recurrence

When the Weekly option is selected, the Weekly Recurrence and Range of Recurrence sections are displayed.

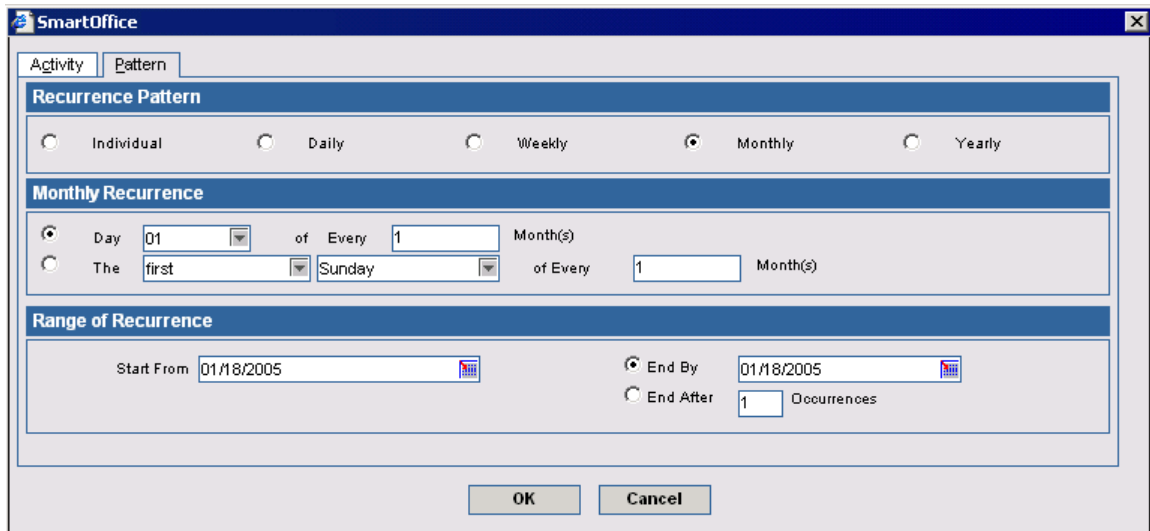


The screenshot shows the 'SmartOffice' application window with the 'Pattern' tab selected. The 'Recurrence Pattern' section has radio buttons for 'Individual', 'Daily', 'Weekly' (selected), 'Monthly', and 'Yearly'. The 'Weekly Recurrence' section includes an 'Every' field with the value '1', a 'Week(s) on:' label, and checkboxes for 'Sunday', 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', and 'Saturday'. The 'Range of Recurrence' section has 'Start From' and 'End By' fields both set to '01/18/2005', and an 'End After' field set to '1' with the label 'Occurrences'. 'OK' and 'Cancel' buttons are at the bottom.

The Weekly Recurrence section is used to pattern an activity to repeat over the cycle of a number of weeks on any combination of specific days of the week. Enter an integer value in the **Every [integer] Week(s) on:** field that represents the number of weeks to wait between recurrences. Select the days of the week that the activity will recur by clicking the options corresponding to the days of the week.

Monthly Recurrence

When the Monthly option is selected, the Monthly Recurrence and Range of Recurrence sections display.



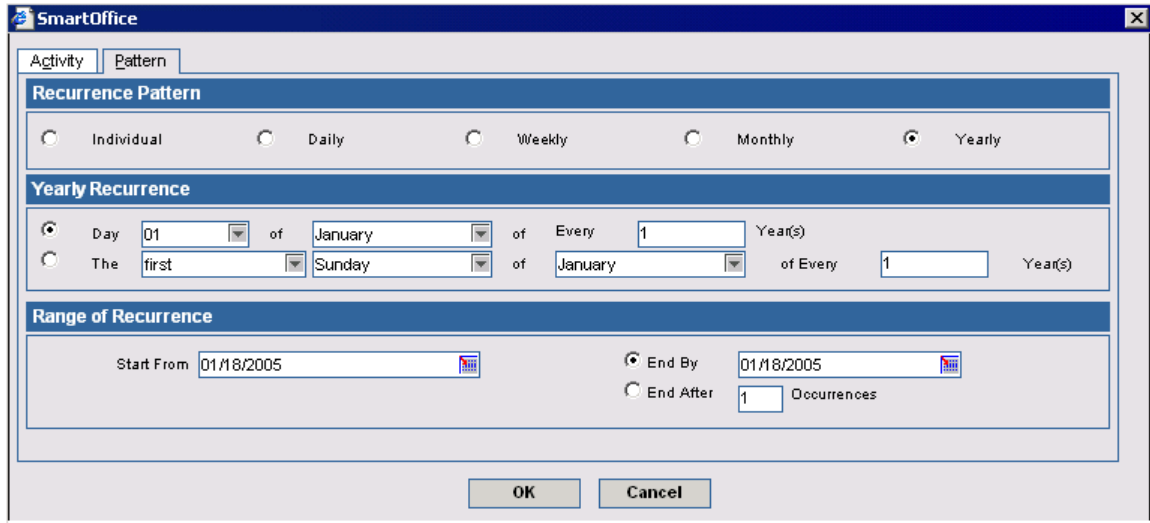
The screenshot shows the 'SmartOffice' application window with the 'Pattern' tab selected. The 'Recurrence Pattern' section has radio buttons for 'Individual', 'Daily', 'Weekly', 'Monthly' (selected), and 'Yearly'. The 'Monthly Recurrence' section has two options: 'Day [01] of Every [1] Month(s)' (selected) and 'The [first] [Sunday] of Every [1] Month(s)'. The 'Range of Recurrence' section has 'Start From' and 'End By' fields both set to '01/18/2005', and an 'End After' field set to '1' with the label 'Occurrences'. 'OK' and 'Cancel' buttons are at the bottom.

The Monthly Recurrence section is used to schedule a single recurrence of the activity over the cycle of a number of months. The day chosen may be the day of the month or a certain day of a certain week that occurs in the month. Click the **Day [01-31] of Every [integer] Month(s)** option to select a day of the month (e.g., the 28th) for the activity to occur. Select the day of the month from the drop-down list and enter an integer value to indicate the number of months in the cycle.

Select the **The [first-fourth, last] [day of the week] of Every [integer] Month(s)** option to select the option to schedule the recurrences on a certain day of a certain week in the month. Select first, second, third, fourth or last from the first drop-down list, and a day of the week from the second. Enter an integer value to indicate the number of months for the cycle.

Yearly Recurrence

When the Yearly option is selected, the Yearly Recurrence and Range of Recurrence sections display.



The screenshot shows the 'SmartOffice' application window with the 'Recurrence Pattern' dialog box open. The 'Pattern' tab is active, and the 'Yearly' radio button is selected. The 'Yearly Recurrence' section has two options: 'Day 01 of January of Every 1 Year(s)' (selected) and 'The first Sunday of January of Every 1 Year(s)'. The 'Range of Recurrence' section has two options: 'End By 01/18/2005' (selected) and 'End After 1 Occurrences'. The 'OK' and 'Cancel' buttons are at the bottom.

The Yearly Recurrence section is used to schedule a single recurrence of the activity over the cycle of a number of years. The day chosen may be a day of a month or a certain day of a certain week of a certain month that occurs in the year. Click the **Day [01-31] of [month] of Every [integer] Year(s)** option to select a day of the month (e.g., the 28th) for the activity to occur. Select the day of the month from the first drop-down list, the month from the second, and enter an integer value to indicate the number of years in the cycle.

Click the **The [first-fourth, last] [day of the week] of [month] of Every [integer] Year(s)** option to select the option to schedule the recurrences on a certain day of a certain week of a certain month in the year. Select first, second, third, fourth or last from the first drop-down list, a day of the week from the second, and a month from the third. Enter an integer value to indicate the number of years for the cycle.

Modify a Recurring Activity

A Recurring Activity can be modified by clicking on the **View Recurring Activities Pattern** button in the various calendar views such as the DayView and WeekView.

Click the **View Recurring Activities Pattern** button to open the Activity Detail dialog box. After making the necessary modifications to the Recurring Activity details, the program will prompt to reflect the changes to all recurring activities. Selecting the option to approve the changes throughout, all the Recurring activities are changed.

By clicking the **View Recurring To Do Items** pattern, a recurring To Do un-timed activity can be modified.

Delete a Recurring Activity

Tag a recurring activity and then click the **Delete Record(s)** button to display a confirmation message stating that the selected record includes recurring activities and prompts the user to delete all the related future recurring activities or to delete only the selected record.

Advanced Calendar Management Feature

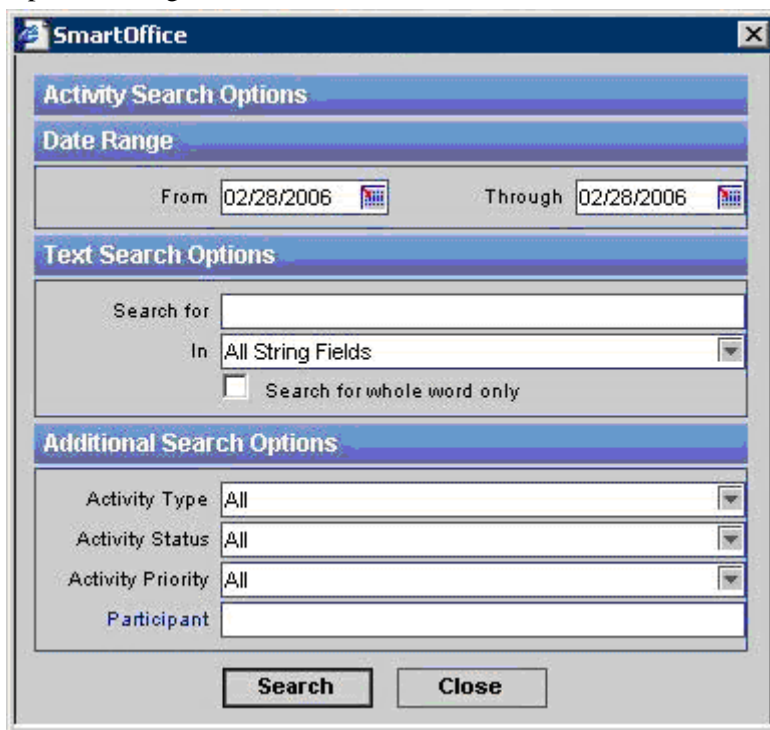
The User Administrator can appropriately modify the look and feel of the Calendar menu for each user. A SmartOffice user can access the following Calendar sub-menus only if the appropriate security privileges are designated on the User Roles/Licenses tab.

- Day List
- Overdue Projects
- Unfinished Appointments
- Important Dates Posting
- Calendar Reports
- Activity Statistics

Activity Search

Activity Search is used to search for existing activities. The activities can be searched based on type, priority, or status between the date ranges.

1. Select **Activity Search** from the **Calendar** expanded menu to open the Activity Search Options dialog box.



The screenshot shows the 'SmartOffice' window with the 'Activity Search Options' dialog box open. The dialog box is divided into three main sections: 'Date Range', 'Text Search Options', and 'Additional Search Options'. The 'Date Range' section has 'From' and 'Through' fields, both containing '02/28/2006' and a 'Pick Date' button. The 'Text Search Options' section has a 'Search for' text box, an 'In' dropdown menu set to 'All String Fields', and a checkbox for 'Search for whole word only'. The 'Additional Search Options' section has three dropdown menus for 'Activity Type', 'Activity Status', and 'Activity Priority', all set to 'All', and a 'Participant' text box. At the bottom are 'Search' and 'Close' buttons.

2. Specify the date range for the activity in the From and Through fields by using the corresponding **Pick Date** buttons.
3. In the Text Search Options section, enter the text that is to be searched for in the Search For field. The field for which the text is to be searched can be specified from the In drop-down list.
4. In the Additional Search Options section, searches are based on Activity Type, Activity Status and Activity Priority. Select the appropriate option from the corresponding drop-down list.

5. Click the Participant hyperlink to select the participant user for searching the activity. This is an optional field and the users that will be available for selection will be based on the proxy settings.
6. Click the **Search** button.
7. Further specify search criteria by clicking the **Activity Search Options** button from the Activity Search Results spreadsheet.

DayList

The DayList displays all the activities for a particular day in a floating dialog box. The dialog box remains open while navigating to different parts of the application. Navigate between different dates and complete or discontinue activities with the DayList.

<input type="checkbox"/>	Type	Sub-Type	Start Time ↑	Mark Done	Full Phone	Contact Name	Subject/Reason	Latest SmartPad Notes
<input type="checkbox"/>	Call	Follow-up		<input checked="" type="checkbox"/>	(626) 790-3807	Hollister, George	Verify details	Contact created on 03/10/2005 at 10:16PM
<input type="checkbox"/>	To Do	Birthday		<input checked="" type="checkbox"/>	(626) 764-9873	Roberts, Leslie	Important Dates Posting - Contact's Birth Date.	Contact created on 03/11/2005 at 01:28PM
<input type="checkbox"/>	Project			<input checked="" type="checkbox"/>	(661) 555-1212	Castillo, Lynn	Transfer Account	Contact created on 03/19/2004 at 09:58AM
<input type="checkbox"/>	Appointment		11:00AM	<input checked="" type="checkbox"/>	(818) 518-3349	Chevaux, Henry Gerome		

Records Shown: 4 Total Records: 4

Close

AutoMove/Unfinished Appointments/Overdue Projects

Unfinished To Do items are advanced to the next day as per the rules of operation of the Activity AutoMove feature as defined in User Preferences.

AutoMove

Depending on the AutoMove activity type options selected in User Preferences, the Untimed Unfinished activities will be rescheduled to today's date on a daily basis as a To Do activity. Only activities with a status of Untimed Active will be moved.

The Activity AutoMove options are the maximum age of activities for which the system will continue to move activities forward. The values available for moving the activities forward are, 1~30 Days, 60 days, 90 days and 180 days. This value corresponds to the predefined value while creating a user through the User Creation Default Settings. Select a value from one to thirty days from the Maximum Days in Past to Move or Display Activities drop-down list.

A user can select the type of activity to be moved forward in User Preferences. The application can perform the AutoMove function on Calls, Appointments, Projects and To Do types of Activities.

Activity AutoMove Options	
Maximum days in past to move or display activities	20 Days
Activity types to be moved forward	
<input type="checkbox"/> Call	<input type="checkbox"/> To Do
<input checked="" type="checkbox"/> Project	<input checked="" type="checkbox"/> Appointment

Unfinished Appointments

The Unfinished Appointments tab displays all of the tracked past appointments that have not yet been marked as Done or Discontinued. This tab, with its wide variety of toolbar options, is an ideal place for quickly and conveniently managing unfinished appointments.

Unfinished Appointments

DayView	AgendaView (SHIFT+L)	WeekView	MonthView	Overdue Projects	Unfinished Appointments
Start Date	Start Time	Contact Name	Reason		
<input type="checkbox"/>	03/10/2006	02:30PM	Chung, Nancy		

Unfinished Appointments Prompt – Message Center

A prompt for Unfinished Appointments displays in the Message Center bubble when the user logs in. From the Message Center dialog box (click the **Message Center** button on the global toolbar), the user can view the details of the Unfinished Appointments that remain unfinished within the time interval that is specified in the Activity AutoMove Options section of User Preferences.

Overdue Projects

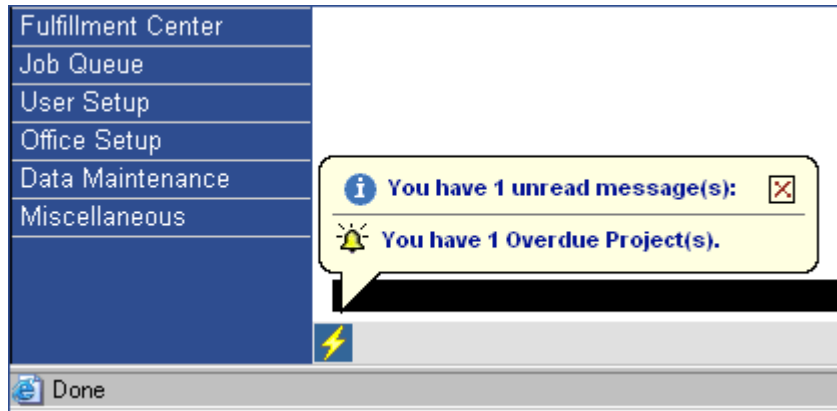
The Overdue Projects tab displays all the tracked Project activities that have not yet been marked Done and have a due date prior to the current date and time. This tab, with its wide variety of toolbar options, is an ideal place for quickly and conveniently managing overdue projects.

Overdue Projects

DayView	AgendaView (SHIFT+L)	WeekView	MonthView	Overdue Projects	Unfinished Appointments
Due Date	Original Due Date	Contact Name	Type	Reason	
<input type="checkbox"/>	04/11/2006	Ackerman, Joseph M.	Project	Meet to discuss 401K options.	
Records Shown: 1 Total Records: 1					

Overdue Projects Prompt – Message Center

A prompt for Overdue Projects displays in the Message Center bubble, notifying the user with the number of Overdue Projects that are yet to be marked as Done when the user logs in. From the Message Center dialog box, the user can view the details of the Overdue Projects.



Activity Creation Options

The Activity Creation Options are used to limit or extend a user's ability to create activities for contacts for which the current user does not have the Security privilege to view or create activities. If a particular user has the privilege to create activities for all users, not all contact details will display; this depends upon the other security privileges that are explained in *Appendix A*.

Activity View Options

The Activity View Option provides the following views:

- View My Activities
- View Activities I Created
- View Other Users' Activities

View My Activities

This option enables a user to view all the activities for which he/she is a participant.

View Activities I Created

This option enables a user to view all the activities that are created by him/her for which he/she may or may not be a participant.

View Other Users' Activities

A user can view other users' activities using this option. The view of other users' activities depends upon the Security Privileges and Office Settings. The view of the activity depends on the:

- User Management: Activity View Options selection.
- Enabling or Disabling of the Office Security.
- Enterprise View user setting. As this depends upon the security privileges, this is further explained in *Appendix A*.

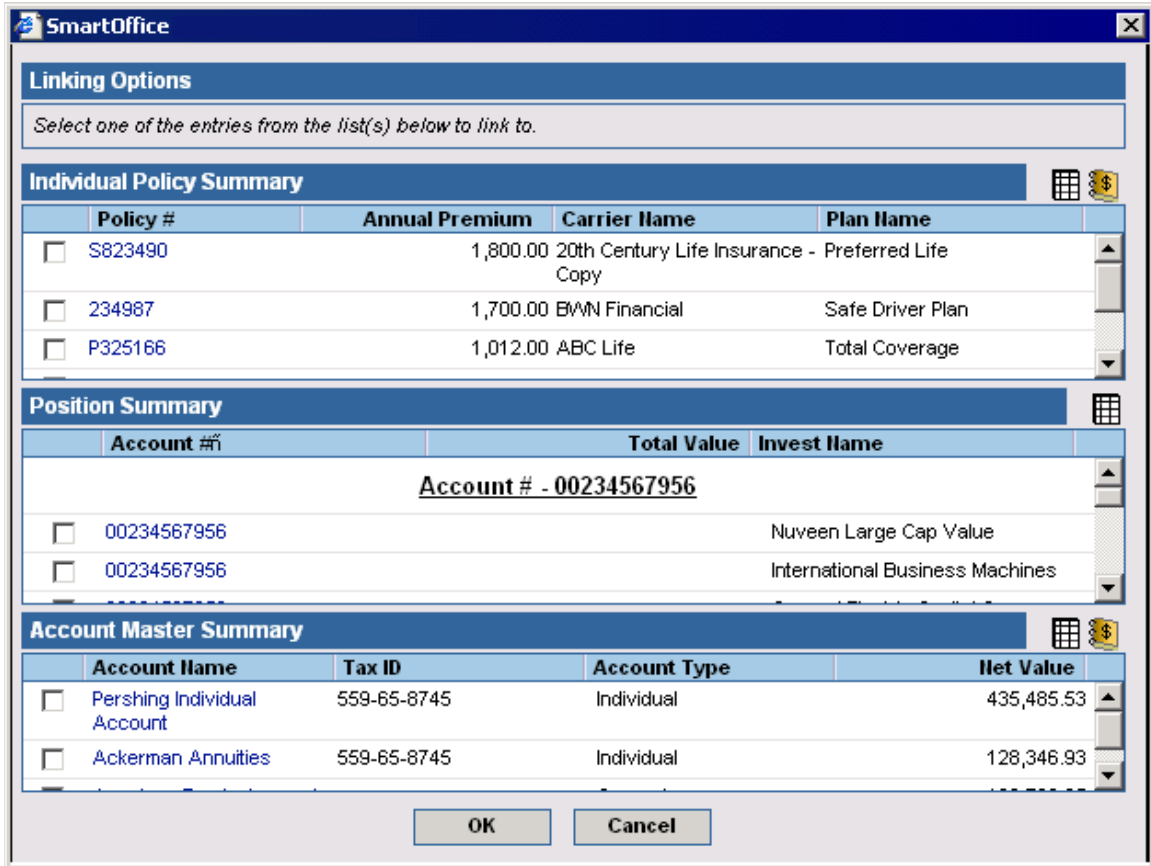
Integration with Other Modules

Integration of Activities with a Contact Individual/Business

To open a contact's Activity Log, click the **Activity Log** button from the contact's Personal tab. A user can add, delete and modify activities from the Activity Log.

Integration of Activities with the Policy/Pending Case Management /Investment/Opportunity Modules

When the Activity Detail dialog box of an activity is opened from the various Calendar views, an Options button is displayed. Click the **Options** button to open the Linking Options dialog box.



The Linking Options dialog box displays the policies, positions and account master records associated with the contact and thereby enables the user to link the activity with the relevant record. An activity can be linked to only one policy, position or account master record.

Integration of Activities with Policies

From the Activity/Mail tab of a Policy, a user can create activities for all of the related contacts associated with a Policy such as the Primary Contact, Primary Insured, Owner, Payor, Primary Advisor, Advisor's Supervisor and Carrier.

When an activity is created from the Activity/Mail tab of the Policy Module, the Keywords field is automatically updated with the Policy number. The Policy button displays in the Activity Detail dialog box for the activities linked to the Policy. A user can navigate to the Basic Information tab of the Policy by clicking the Policy button.

To link an activity from the calendar to a policy, or to re-link the activity to a different policy of the associated contact, click the **Options** button in the Activity Detail dialog box and then select the appropriate policy in the Linking Options dialog box. This automatically populates the Policy number in the Keywords field. An activity can be linked to a policy from the different views of the calendar only if the user has an Individual Policy Tracking module license.

Integration of Activities with Pending Case Management

From the Activity/Mail tab of a Pending Case, a user can create activities for all the related contacts associated with the Pending Case such as Primary Contact, Primary Insured, Owner, Payor, Primary Advisor, Advisor's Supervisor, Case Manager, Carrier, Service Provider, Medical Facility and Requirement Manager.

When an activity is created from the Activity/Mail tab of the Pending Case module, the Keywords field is automatically updated with the policy number and the field becomes read-only. The Policy button displays in the Activity Detail dialog box. Click the **Policy** button to open the Basic Information tab of the Policy (Pending Case).

To link an activity from the calendar with a policy or to re-link the activity to a different policy of the associated contact, click the **Options** button in the Activity Detail dialog box and then select the appropriate policy in the Linking Options dialog box. This automatically populates the policy number in the Keywords field.

Integration of Activities with Investments

Activities are integrated with investments through the:

- Account Master.
- Positions.

From the Activity/Mail tab of the Account Master or Position tab, a user can create activities for the associated contact of the Account Master or Position. When an activity is created from the Activity/Mail tab of the Account Master, the Keywords field is automatically updated with the Account number. The relevant Account Master or Position button displays in the Activity Detail dialog box when an activity is linked to an account master or position record respectively. Click the **Account Master** or **Position** button to display the corresponding Account Master or Position information.

To link an activity with the Account Master or Positions, or to re-link the activity to a different Account Master or Position of the associated contact, click the Options button in the Activity Detail dialog box and select the appropriate Account Master or Position record in the Linking Options dialog box. This automatically populates the account number in the Keywords field.

An activity can be linked to an Account from different calendar views only if the user has an Investment Tracking module license.

Integration of Activities with Opportunities

From the Opportunity Activities tab, a user can create activities for an Opportunity. When an activity is created from the Activities tab of the Opportunity module, in the Activity Detail dialog box, an Opportunity drop-down list displays next to the Keywords field. This enables a user to switch over from one opportunity to another for a contact at the time of activity creation.

An activity can be linked to an Opportunity from different calendar views only if a user has an Opportunity module license.

Integration of Activities with Recruits

By using the Recruitment Activity Log, a user can create activities for the Candidate/Recruit. Click the **Activity Log** button from the Candidate/Recruit Summary or Personal tab to open the Contact Activity log that contains information regarding all the activities for that particular recruit or candidate. Activities can be linked to Recruits only when the current logged in user has a Recruitment Tracking module license.

Integration of Activities with Leads

An activity can be linked to Leads only when the logged in user has a Leads Tracking module license.

Navigating to Linked Records from AgendaView

The Linked Record column available in the AgendaView calendar will indicate the physical link of an activity with a Policy/Account/Position/Lead/Opportunity/Service Request. The physical links of an activity with various modules will be indicated through buttons.

A user can navigate to a particular linked record by clicking on the button shown in the Linked Record column, provided the user has the security rights. Click the **Move to Linked Policy** button to take the user to the Policy Detail page, provided the user has the proper licenses for the Policy module.

Monday March 13, 2006

Date Ranges: Today

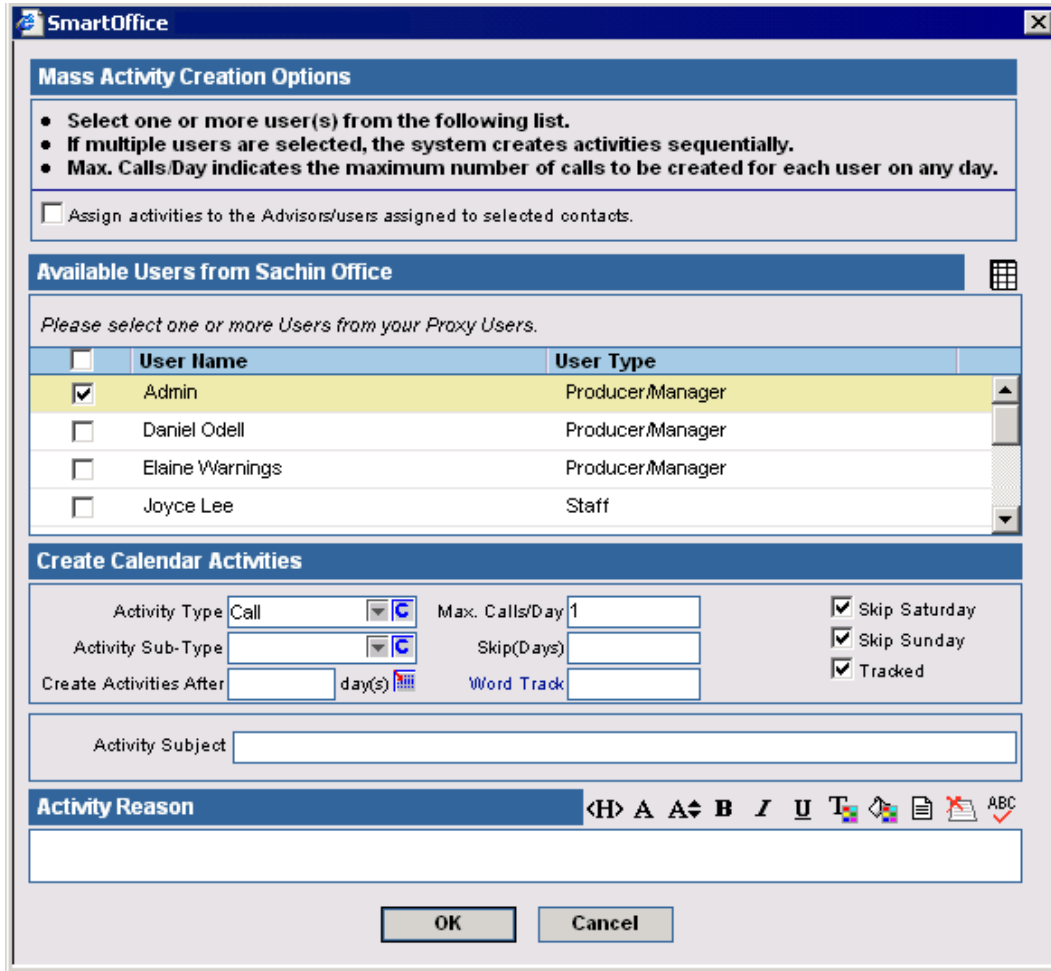
DayView	AgendaView (SHIFT+L)	WeekView	MonthView	Overdue Projects	Unfinished Appointments			
Type	Status	Sub-Type	Mark Done	Contact Name	Full Phone	Subject/Reason	Linked Record	Latest SmartPad Notes
<input type="checkbox"/> Project	Active		<input checked="" type="checkbox"/>	Castillo, Lynn	(661) 555-1212	Transfer Account		Contact created on 03/19/2004 at 09:58AM
<input type="checkbox"/> Call	Active		<input checked="" type="checkbox"/>	Arias, Rhodora C	(926) 555-4444	Policy Renewal		Dial Made No Interest Contact Made User Notes- Initial call for the Estate Planning Campaign
<input type="checkbox"/> Appointmen	Active		<input checked="" type="checkbox"/>	Thorenton, Richard L.		Rider		Contact created on 03/25/2005 at 03:04PM
<input type="checkbox"/> Meeting	Active		<input checked="" type="checkbox"/>	Gunderson, Elisabeth	(323) 621-8654	Aggressive Growth Fund		
<input type="checkbox"/> Call	Active		<input checked="" type="checkbox"/>	Christiansen, Carolina	(212) 765-4454	Service Request		

Records Shown: 4 Total Records: 4

Mass Activity Creation

Mass Activity Creation is used to streamline the process of creating multiple copies of the same activity, each linked to the members of a list of contacts. The list is usually a summary of Individual or Business Contacts. (This includes specialized segregated Individual Contact types such as Advisors, Recruits, Leads, etc.)

This dialog box can be used to create the same To Do activity for more than one contact and user when open to a Summary page. Tag one or more contacts and then click the **Mass Activity Creation** button to open the Mass Activity Creation Options dialog box.



If the user clicks the **Assign Activities to the Advisors/Users Assigned to Selected Contacts** option, the entire Select User(s) for Assignment section becomes unavailable. Check this option to automatically select users for activity assignment on the basis of their assignment to the Contacts previously tagged.

A user can select the Activity Type and Sub-Type from the respective drop-down lists. If lead-time is needed, enter the number of days to delay the creation of the Activities in the Create Activities After [integer] Day(s) field. Enter the maximum number of Activities for each Contact to be scheduled per day in the Max. Calls/Day field. The default value is 1. If the system should create a batch of Activities in a period greater than one day, enter the number of days between activity batch creation in the Skip (Days) field.

The Skip Saturday and Skip Sunday options will skip Saturdays and Sundays while calculating the Create Activities After [Days] Days. When the day on which the activity is to be created falls on a Saturday or a Sunday after calculating the Create Activities After [Days], the system will skip Saturdays and Sundays, and by default, the activity will be created on a Friday.

For all activities created through the Mass Activity Creation, the default Priority will be set to Normal and default Show Time As will be set to Busy.

Important Dates Posting

Important Dates Posting is used to extract important dates that are related to Individual or Business contacts.

1. Select **Important Dates Posting** from the **Calendar** expanded menu to open the Important Dates Posting dialog box. This dialog box is used to automatically extract important dates from the database and post them into the Calendar. Important Dates can be Contact Birthdays, Policy Renewal dates, Investment Maturity dates, etc.
2. Select the **Assign Activities to the Advisors/Users assigned to selected contacts** option to make the entire Select User(s) for Assignment section unavailable. Select this option to automatically select users for activity assignment on the basis of their assignment to the tagged Contacts.
3. For all activities created through the Important Dates Posting, the default Priority will be set to Normal and the default Show Time As will be set to Busy.

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	Lead Time <input type="text"/>
<input type="radio"/> Policy Renewal	Ignore year <input checked="" type="checkbox"/>
<input type="radio"/> Investment Maturity	Skip Saturday <input checked="" type="checkbox"/>
<input type="radio"/> Extract Dates from Specific Table	Skip Sunday <input checked="" type="checkbox"/>

Date Range	Parameters for creating activities
From <input type="text"/>	Tracked <input type="checkbox"/>
Through <input type="text"/>	Keywords <input type="text"/>

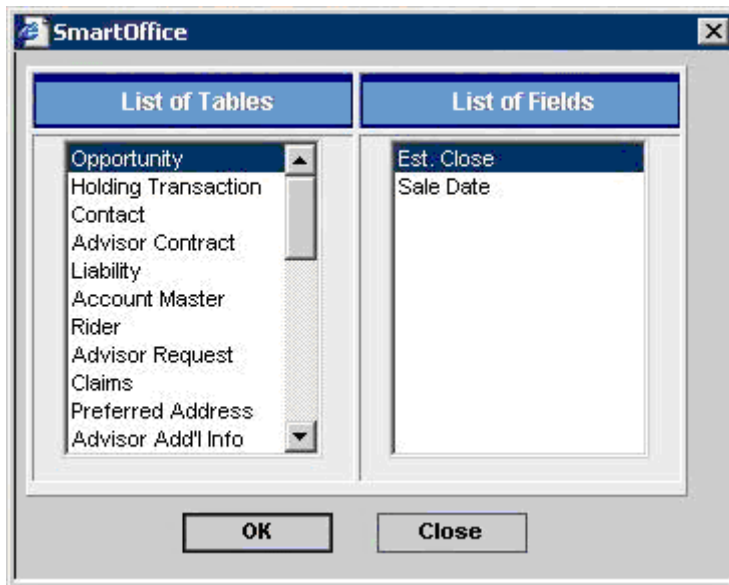
Select Contacts Using a Set or Filter	Activity Reason
<input checked="" type="radio"/> Set <input type="text"/>	Contact Information Birth Date - \$CL_DOB
<input type="radio"/> Filter	

Subject

Assign activities to the Advisors/users assigned to selected contacts.

OK Cancel

- Important Dates can be extracted and posted onto the calendar for other dates such as the Contact Review Date, HIPAA date, Business Established date, Account Master Closed date, etc. Select the **Extract Dates from Specific Table** option to open the List of Tables and Fields dialog box.



- Select the date types to be used as the posting criterion by selecting an option from the Extract Dates From section. The first three options, Date of Birth of Contacts, Renewal Dates of Policies and the Maturity Dates of Investments are predefined search and posting criteria and can be selected readily. The fourth button, Extract Dates from Specific Table, opens a dialog box that allows the user to indicate the table and corresponding field column to be used in the search and posting.
- If the dates to be searched should fall between a certain date range, enter the range in the Date Range section. Enter the starting date in the From field and the ending date in the Through field by using the corresponding Pick Date button.
- If the dates to be searched involve certain contacts for which the activities are to be posted, specify a Filter or a Set in the Select Contacts Using Set or Filter section. If using a Set to narrow the range, click the **Set** option. This will make the Set field display. Select or add a Set by clicking the **Set** field hyperlink. This opens the Search Set dialog box for Sets to be searched or added accordingly. The process is similar for Filters.
- In the Date Extraction section, enter an integer value in the Lead Time (Days) field to indicate how many days prior to the date to actually post the Activity. The default value is blank (0). Select **Ignore Year** if the activity should be posted on the date every year. To avoid having activities posted on a Saturday and/or Sunday, select the **Skip Saturday** and/or **Skip Sunday** option(s) as needed.
- Certain parameters that are selected while creating an activity can be specified here. Select the **Tracked** option if the activities are to be tracked. Enter a Keyword for ease of searching for the activity later and enter a reason for the Calls in the Reason text field.
- Click the **OK** button.

11. Activities will be created for all contacts that the current user can access based on the Important Dates Posting option selected.
12. For those activities that are created through Important Dates Posting by selecting the first three options in the Extract Dates From section, the activities will have a preset or predefined activity Reason and Subject.

Activities Posted by the Important Dates Posting Feature Dialog Box

The Activities Posted using the Important Dates Posting feature are displayed after extracting the dates and scheduling the activity for the associated contacts.

Date Extraction Patterns

The activities that are posted automatically through Important Dates Posting will be within the Date Range of Current Date This Year to [Current Date –1] of Next Year. Date extraction for Policy renewals and Investment Maturities are usually performed for the current period or for the future. For these options, the Ignore Year option need not be selected. As per the given dates in the Date Range, the data is extracted and activities are posted in the future. The Ignore Year option is used while extracting dates for sections such as the Contact's DOB wherein the occurrence of dates is periodic.

Reports

Activity Statistics Report

The Activity Statistics dialog box and report is used to view a statistical analysis of his/her activities. A user can see his or her effectiveness for a particular period of time in terms of percentage of marketing activities that resulted in a sale made, or in terms of a dollar amount for each such activity (based on total commissions for sales made in that time period). The period specified could be contrasted against another user-definable time period. With the exception of the time periods specified, both sets of statistics are identical and are displayed side by side.

A user can generate the Activity Statistics Report for himself/herself or for other users in the office for whom he has the Security Privilege to access. This is dependent upon the Group Reporting user role.

Generate an Activity Statistics Report

1. Select **Activity Statistics** from the **Calendar** expanded menu to open the Activity Statistics Options dialog box.
2. Specify the Date Range.
3. Specify the Comparison Period (if applicable).
4. Specify the Filter (if applicable).
5. Click the **OK** button to display the report.
6. Click the **Print** button to generate the report in PDF format.

The list of users listed in the Available Users dialog box depends upon the Office Settings. Please refer to *Appendix A* for further information.

Activity Statistics Options Dialog Box

Select a Date Range

A user must select the Date Range to specify the time period for the generation of the report. The date ranges can be selected using:

- The From and Through fields.
- The Predefined Date Range.

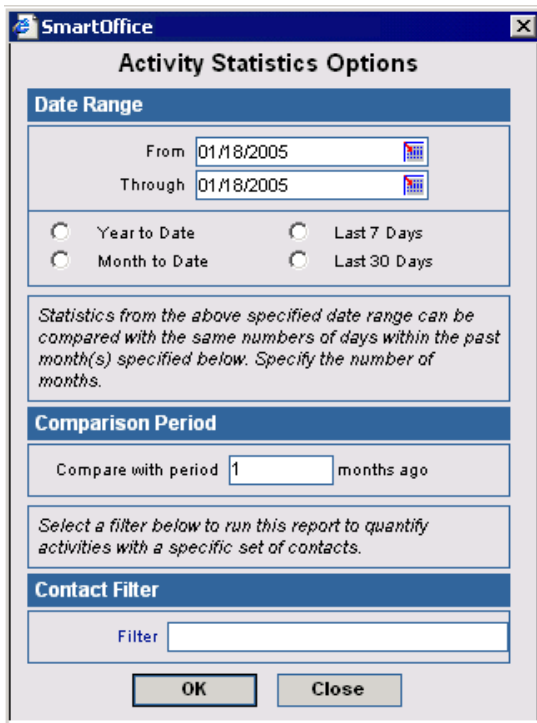
Select a Date Using the From and Through Fields

The Activity Statistics Options dialog box opens first so that the date ranges to be displayed in the report can be specified. Any date range can be specified by entering the starting date in the From field and the ending date in the Through field.

Select a Predefined Date Range

In addition to using the From and Through fields, the options in the Date Range section can also be used. These date ranges start from the current date and extend backwards. If any of these options are selected, the entries in the From and Through fields are reset to match the date range selected. The Date Ranges are:

- Year to Date (select this option to generate an activity statistics report from the start date of the current year to the current date).
- Month to Date (select this option to generate an activity statistics report from the start date of the current month to the current date).
- Last 7 Days (select this option to generate an activity statistics report for the past 7 days from the current date).
- Last 30 Days (select this option to generate an activity statistics report for the past 30 days from the current date).



The screenshot shows the 'SmartOffice' window with the 'Activity Statistics Options' dialog box open. The dialog box has a title bar with 'SmartOffice' and a close button. The main content area is titled 'Activity Statistics Options' and is divided into several sections:

- Date Range:** Contains two text boxes labeled 'From' and 'Through', both containing the date '01/18/2005'. Each text box has a small calendar icon to its right.
- Predefined Date Range:** Contains four radio button options: 'Year to Date', 'Month to Date', 'Last 7 Days', and 'Last 30 Days'. All radio buttons are currently unselected.
- Comparison Period:** Contains a text box labeled 'Compare with period' with the value '1' and the text 'months ago' to its right.
- Contact Filter:** Contains a text box labeled 'Filter' which is currently empty.

At the bottom of the dialog box are two buttons: 'OK' and 'Close'.

Comparison Period

A user can compare the Activity Statistics to the past period to effectively find the efficiency of the activities. By default, the Compare With period is 1 Month.

Filters

A user can generate specific reports with filters. The activity statistics can be applied only to contact-specific filters. For example, a user can generate statistics for contacts whose age is greater than 30.

Activity Statistics Report and Calculation

The Activity Statistics dialog box displays the results of analysis of the queries with identical statistical formulas for the two date ranges.

SmartOffice				
Activity Statistics for Admin (12/20/2004 Thru 01/18/2005)				
	Current Period		Comparison Period	
	Scheduled	Completed	Scheduled	Completed
Projects	1			
Letters		1		
New Suspects/Prospects Added				
New Leads Added				
Calls Scheduled	4			
Dials Made/Contacts Made				
Initial Appointments Scheduled/Completed				
Fact Finder Appointments Scheduled/Completed				
Business Meal Appointments Scheduled/Completed				
Closing Interviews Scheduled/Completed				
Other Appointments Scheduled/Completed	4			
Total Appointments Scheduled/Completed	4			
Total Phone Time(Minutes)				
Average Time Per Dial (Minutes)				
Successful Closing Interviews				
Total Sales Made				
Total Commission				
	Percentage	Unit Value	Percentage	Unit Value
% Contacts Made/Currency Units per Dial Made				
% Appointments Made/Currency Units per Contact made				
% Successful/Currency Units per Closing Interview				
% Sales Made/Currency Units per Appointment				

Note: Currency unit values are calculated by dividing the total amount of commission reported when entering a Sale Made Outcome by the number of actions. They are expressed in the currency unit paid (e.g., dollars, yen).

Print Close

Field Name	Description
Projects	Number of Activities of the Project Type where there is an Activity History record of the Activity Created type.
Letters	Number of Activities where there is an Activity History record of the Letters Sent type. The letters sent are for Appointment confirmation.
New Suspects/Prospects Added	Number of new Individual Contacts whose Created On dates fall within the date range specified and are of the Suspect or Prospect type.
New Leads Added	Number of new Individual Contacts whose Current Leads Status accepted date falls within the date range specified. This is available only if a user has a Leads Tracking module license.
Calls Scheduled	Number of Activities of the Call type where there is an Activity History record of the Activity Created type.
Dials Made	Number of Activities of the Call Type where there is an Activity History record of the Dial Made type.
Contacts Made	Number of Activities of the Call Type where there is an Activity History record of the Contact Made type.
Initial Appointments Scheduled	Number of Activities of the Appointment type and the Initial sub-type where there is an Activity History record of the Activity Created type.
Initial Appointments Completed.	Number of Activities of the Appointment type and the Initial sub-type where there is an Activity History record of the Appointment Completed type.
Fact Finder Appointments Scheduled	Number of Activities of the Appointment type and the Fact Finding sub-type where there is an Activity History record of the Activity Created type.
Fact Finder Appointments Completed	Number of Activities of the Appointment type and the Fact Finding sub-type where there is an Activity History record of the Appointment Completed type.
Business Meal Appointments Scheduled	Number of Activities of the Appointment type and the Business Meal sub-type where there is an Activity History record of the Activity Created type.
Business Meal Appointments Completed	Number of Activities of the Appointment type and the Business Meal sub-type where there is an Activity History record of the Appointment Completed type.
Closing Appointments Scheduled	Number of Activities of the Appointment type and the Closing sub-type where there is an Activity History record of the Activity Created type.
Closing Appointments Completed	Number of Activities of the Appointment type and the Closing sub-type where there is an Activity History record of the Appointment Completed type.

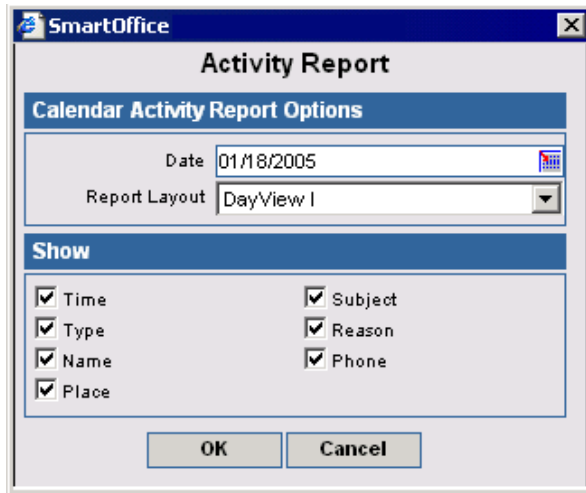
Other Appointments Scheduled	Number of Activities of the Appointment type and of any sub-type other than Initial, Fact Finding, Business Meal, or Closing, where there is an Activity History record of the Activity Created type.
Other Appointments Completed	Number of Activities of the Appointment type and any sub-type other than Initial, Fact Finding, Business Meal, or Closing, where there is an Activity History record of the Appointment Completed type.
Total Appointments Scheduled	Number of Activities of the Appointment type where there is an Activity History record of the Activity Created type.
Total Appointments Completed	Number of Activities of the Appointment type where there is an Activity History record of the Appointment Completed type.
Total Phone Time	For the Activities of the Call Type where there is an Activity History record of the Contact Made type, it is the total number of minutes from the duration column of these Activity History records.
Average Time Per Dial	Total Phone Time/Dials Made.
Successful Closing Interviews	The number of Closing Interviews completed.
Total Sales Made	The number of Activities with an Activity History record of Sale Made.
Total Commission	For the Activities where there is an Activity History record of the Sale Made type, the total number of currency units (e.g., dollars, yen, rupees) from the commission column of these Activity History records.
% Contacts Made	Ratio (%): The value calculated in Contacts Made divided by the value calculated in Dials Made.
Currency Units per Dial Made	The value calculated in Total Commission divided by the total number of Dials made.
% Appointments Made	Ratio (%): The number of Appointments scheduled by entering the Enter Scheduled Appointment Outcome from the Contact Made dialog box divided by the value calculated in Contacts Made.
Currency Units Per Contacts Made	The value calculated in Total Commission divided by the total number of Contacts Made.
% Successful	Ratio (%): The number of Closing Interviews completed to the number scheduled.
Currency Units per Closing Interview	The value calculated in Total Commission divided by the number of Closing Interviews completed.
%Sales	Ratio (%): The number of Sale Made Outcomes entered for Appointments scheduled by entering the Enter Scheduled Appointment Outcome from the Contact Made dialog box divided by the number of Appointments scheduled by entering the Enter Scheduled Appointment Outcome from the Contact Made dialog box.
Currency Units per Appointment	The value calculated in Total Commission divided by the value calculated in Appointments Completed.

Calendar Activity Reports

Calendar Activity Reports are versions of an HTML report displaying a summary of all types of activities, or showing activities for any time range. A user can generate the Calendar Activity Report for his/her own activities or for other users in the office for whom he/she has the Security Privilege to access.

Generation of Calendar Activity Reports

1. Select **Calendar Reports** from the expanded **Calendar** menu to display the Activity Report dialog box.



2. Select the Date for which the report will be generated.
3. Specify the Report Layout.
4. Specify the appropriate Show options.
5. Click the **OK** button to generate the report.
6. Click the **Print** button to send the report to the printer, click the **Close** button to close the report or click the **Modify** button to modify the report.

Field Name	Descriptions
Time	Includes the time of Activities.
Place	Includes the place of Activities.
Name	Includes the name of Contacts for Activities.
Type	Includes the types of Activities.
Phone	Includes the phone numbers of Activities.
Reason	Includes the reasons for Activities.

Report Formats in Calendar Reports

SmartOffice supports seven different reports formats. Timed Activities and All Day Events will be displayed in all the Report formats whereas the Untimed activities are displayed only in the DayView I, DayView II, DayView Landscape and Trifold report formats. Activities spanning over a single day will be shown in the respective sections in all the report formats.

The DayView I, DayView Landscape and DayView Summary report formats carries a note in the reports that activities will be displayed only for a specific time range for each of the above mentioned report formats.

DayView 1

2 Thursday
March 2006

February 2006

St	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

March 2006

St	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

April 2006

St	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

Time	Schedule	Other
8AM	<input type="checkbox"/> All Day Event - Project - BWN Financial - 123 E. Green Street, Pasadena, CA 91106 LOS ANGELES [B] - Product Training - Attend the Product Training classes <input type="checkbox"/> All Day Event - Meeting - Smith, Franklin & Sobers - 3883 Wilshire Blvd., Los Angeles, CA 90013 [B] - (626) 422-9389 - Referral Bonus - Bonus Check	New Activities
9:00		
10:00		
11:00	<input type="checkbox"/> 11:15AM - 12:15PM - Appointment - Iverson, Maureen - 3134 Busy St., Phoenix, AZ 85008 USA [B] - (714) 824-6790 - Product Information - Zen Life Product - Launched recently - need to get the product information brochures	
12PM		Untimed
1:00		<input type="checkbox"/> Project - Baker, Donald - (626) 378-9072 - Project 90 <input type="checkbox"/> Appointment - Adam, Adams - Appointment 90 <input type="checkbox"/> Call - Andrick, Nataniel - Call 90 <input type="checkbox"/> Call - Andrick, Nataniel - Birthday <input type="checkbox"/> Call - Baker, Donald - (626) 378-9072 - Call 90 <input type="checkbox"/> Appointment - Baker, Donald - (626) 378-9072 - Appointment 90 <input type="checkbox"/> Appointment - Ackley, John - (310) 555-8585 <input type="checkbox"/> To Do - Zeus Corp - To Do 90
2:00	<input type="checkbox"/> 02:00PM - 02:30PM - Appointment - Porter, Steve	
3:00		
4:00		
5:00		
6:00		
7:00	<input type="checkbox"/> 07:00PM - 08:30PM - Appointment - Nakano, Jeffrey - 1138 Diamond Ave, Pasadena, CA 91109 [R] - (626) 844-0100 - Business Meal - Collect Referral	
8PM		

Notes

Note: Activities scheduled before 8:00am and after 9:00pm are not shown on this report.

DayView Landscape

2 Thursday
March 2006

March 2006
 St Mo Tu We Th Fr Sa
 1 2 3 4
 5 6 7 8 9 10 11
 12 13 14 15 16 17 18
 19 20 21 22 23 24 25
 26 27 28 29 30 31

3 Friday
March 2006

March 2006
 St Mo Tu We Th Fr Sa
 1 2 3 4
 5 6 7 8 9 10 11
 12 13 14 15 16 17 18
 19 20 21 22 23 24 25
 26 27 28 29 30 31

Time	Schedule	Other
8AM	<input type="checkbox"/> All Day Event - Meeting - Smith, Franklin & Sobers - 3983 Wilshire Blvd., Los Angeles, CA 90013 [B] - (626) 422-9389 - Referral Bonus - Bonus Check <input type="checkbox"/> All Day Event - Project - BWIN Financial - 123 E. Green Street, Pasadena, CA 91106 LOS ANGELES [B] - Product Training - Attend the Product Training classes	New Activities
9:00		
10:00		
11:00	<input type="checkbox"/> 11:15AM - 12:15PM - Appointment - Iverson, Maureen - 3134 Busy St., Phoenix, AZ 85008 USA [B] - (714) 824-8790 - Product Information - Zen Life Product - Launched recently - need to get the product information brochures	Untimed <input type="checkbox"/> Project - Baker, Donald - (626) 378-9072 - Project 90 <input type="checkbox"/> Appointment - Adam, Adams - Appointment 90 <input type="checkbox"/> Call - Andriak, Nataniel - Birthday <input type="checkbox"/> Appointment - Ackley, John - (310) 555-8565 <input type="checkbox"/> Appointment - Baker, Donald - (626) 378-9072 - Appointment 90 <input type="checkbox"/> Call - Baker, Donald - (626) 378-9072 - Call 90 <input type="checkbox"/> To Do - Zeus Corp - To Do 90 <input type="checkbox"/> Call - Andriak, Nataniel - Call 90
12PM		
1:00		
2:00	<input type="checkbox"/> 02:00PM - 02:30PM - Appointment - Porter, Steve	
3:00		
4:00		
5:00		

Time	Schedule	Other
8AM		New Activities
9:00		
10:00	<input type="checkbox"/> 10:00AM - 10:30AM - Call - Barnaby, Christine - (626) 585-9748 - New Product Launch	
11:00		
12PM		
1:00		Untimed
2:00		<input type="checkbox"/> To Do - Porter, Steve - Important Dates Posting - Contact's Birth Date - Contact Information Birth Date - 03/02/1970 <input type="checkbox"/> To Do - Valentine, Sara - (310) 462-3698 - Important Dates Posting - Contact's Birth Date - Contact Information Birth Date - 02/28/1973 <input type="checkbox"/> To Do - Ortega, Mguel - (818) 4612-3546 - Important Dates Posting - Contact's Birth Date - Contact Information Birth Date - 03/02/1952 <input type="checkbox"/> To Do - Jeffrey, Laura - (626) 585-9748 - Important Dates Posting - Contact's Birth Date - Contact Information Birth Date - 03/05/1972 <input type="checkbox"/> To Do - Koster, Craig B - (310) 487-9905 - Important Dates Posting - Contact's Birth Date - Contact Information Birth Date - 03/05/1953 <input type="checkbox"/> To Do - Brewer, Marie - (818) 356-9874 - Important Dates Posting - Contact's Birth Date - Contact Information Birth Date - 02/28/1970 <input type="checkbox"/> To Do - Garcia, Anthony - (323) 562-6547 - Important Dates Posting - Contact's Birth Date - Contact Information Birth Date - 03/04/1965
3:00		
4:00		
5:00		

Note: Activities scheduled before 8:00am and after 6:00pm are not shown on this report.

MonthView I

January 2006

Sa	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

February 2006

Sa	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

March 2006

Sa	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

February 2006

Admin

Monday, 1/29	Tuesday, 1/30	Wednesday, 1/31	Thursday, 2/1	Friday, 2/2	Saturday, 2/3	Sunday, 2/4
<input type="checkbox"/> 04:30 PM - 05:00 PM - Appointment - Non-DB - fdbhs <input checked="" type="checkbox"/> 08:30 PM - 09:00 PM - Appointment - Adam, Adams	<input type="checkbox"/> All Day Event - Call - Adam, Adams - Follow up calls <input type="checkbox"/> 11:00 AM - 11:30 AM - Call - Armita, Amy Lynn - (626) 991-2313 - Annuity <input checked="" type="checkbox"/> 04:30 PM - 05:00 PM - Appointment - Armita, Amy Lynn - (626) 991-2313 - Policy - Contact for Policy <input type="checkbox"/> 06:00 PM - 06:30 PM - Call - Adam, Adams - Carrier	<input type="checkbox"/> All Day Event - Call - Adam, Adams <input checked="" type="checkbox"/> 04:00 PM - 04:30 PM - Call - Fidelity Investments - timed call - Admin	<input type="checkbox"/> 02/01/2006 - 02/04/2006 - Call - Fidelity Investments	<input type="checkbox"/> 02/01/2006 - 02/04/2006 - Call - Fidelity Investments	<input type="checkbox"/> 02/01/2006 - 02/04/2006 - Call - Fidelity Investments	<input type="checkbox"/> 02/01/2006 - 02/04/2006 - Call - Fidelity Investments
<input type="checkbox"/> 01:00 PM - 01:30 PM - Appointment - Adams, Mark - (800) 335-1462#103	<input type="checkbox"/> 01:00 PM - 01:30 PM - Appointment - Adams, Mark - (800) 335-1462#103	<input type="checkbox"/> 12:00 PM - 01:00 PM - Appointment - Barber, Banaras - 2121 W Ave., Pittsburgh, PA 15218 USA [B] - Policy Renewal				
<input type="checkbox"/> 09:30 AM - 10:00 AM - Appointment - Adam, Adams <input type="checkbox"/> 12:30 PM - 01:00 PM - Appointment - Andrick, Nataniel <input type="checkbox"/> 02:30 PM - 03:00 PM - Appointment - Andrick, Nataniel <input type="checkbox"/> 06:30 PM - 07:00 PM - Appointment - Adam, Adams - Scheduld Call - From Outcome	<input type="checkbox"/> 12:30 PM - 01:00 PM - Appointment - Andrick, Nataniel <input type="checkbox"/> 06:00 PM - 07:00 PM - Call - Adam, Adams - 6 to 7 - timed call <input type="checkbox"/> 09:00 PM - 09:30 PM - Appointment - Adam, Adams - Appt 1.5hr - appt	<input type="checkbox"/> 02/15/2006 7:00 PM - 02/17/2006 12:00 AM - Appointment - Nelson, Joe - test crash - yosho test crash	<input type="checkbox"/> 02/15/2006 7:00 PM - 02/17/2006 12:00 AM - Appointment - Nelson, Joe - test crash - yosho test crash	<input type="checkbox"/> All Day Event - Call - Adams, Iris P		
			<input type="checkbox"/> 02/22/2006 5:30 PM - 02/24/2006 12:00 AM - Appointment - Andrick, Nataniel <input type="checkbox"/> 07:00 AM - 07:30 AM - Appointment - Antosen, Robert C. - (818) 965-4455	<input type="checkbox"/> 02/22/2006 5:30 PM - 02/24/2006 12:00 AM - Appointment - Andrick, Nataniel <input type="checkbox"/> 07:00 AM - 07:30 AM - Appointment - Antosen, Robert C. - (818) 965-4455		
<input type="checkbox"/> 07:00 AM - 07:30 AM - Appointment - Barnaby, Christine - (626) 585-9748 - Contact Referral	<input type="checkbox"/> 08:30 AM - 09:00 AM - Appointment - Arias, Rhodora C - 8331 W Fullam St, Peonia, AZ 85382-0898 [R] - (928) 555-4444 - Policy Renewal - Policy Renewal date coming soon! <input type="checkbox"/> 10:00 AM - 12:30 PM - Meeting - Hall, Cynthia - 179 N Craig Ave., Manhattan, NY 89022 [R] - (258) 534-7698 - Contact Referral <input type="checkbox"/> 05:30 PM - 07:00 PM - Call - Zeus Corp - 831 W Boland Park, Cincinnati, OH 46201 [B] - Tax Calculation	<input type="checkbox"/> 11:15 AM - 12:15 PM - Appointment - Iverson, Maureen - 3134 Busy St., Phoenix, AZ 85008 USA [B] - (714) 824-6790 - Product Information - Zen Life Product - Launched recently - need to get the product information brochures <input type="checkbox"/> 02:00 PM - 02:30 PM - Appointment - Porter, Steve <input type="checkbox"/> All Day Event - Project - BWWN Financial - 123 E. Green Street, Pasadena, CA 91106 LOS ANGELES [B] - Product Training - Attend the Product Training classes <input type="checkbox"/> All Day Event - Meeting - Smith, Franklin S. Sobers - 3893 Wilshire Blvd., Los Angeles, CA 90013 [B] - (626) 422-9399 - Referral Bonus - Bonus Check <input type="checkbox"/> 07:00 PM - 08:30 PM - Appointment - Nakano, Jeffrey - 1138 Diamond Ave, Pasadena, CA 91109 [R] - (626) 844-0100 - Business Meal - Collect Referral	<input type="checkbox"/> 10:00 AM - 10:30 AM - Call - Barnaby, Christine - (626) 585-9748 - New Product Launch			

WeekView I

27 Monday
February 2006

February 2006						
St	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

March 2006						
St	Mo	Tu	We	Th	Fr	Sa
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April 2006						
St	Mo	Tu	We	Th	Fr	Sa
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9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Sunday 5
March 2006

Admin

Monday February 27 2006	Tuesday February 28 2006
<input type="checkbox"/> 07:00AM - 07:30AM - Appointment - Bamaby, Christine - (626) 585-9748 - Contact Referral	<input type="checkbox"/> 08:30AM - 09:00AM - Appointment - Arias, Rhodora C - 8331 W Fullam St., Peoria, AZ 85382-0898 [R] - (928) 555-4444 - Policy Renewal - Policy Renewal date coming soon! <input type="checkbox"/> 10:00AM - 12:30PM - Meeting - Hall, Cynthia - 179 N Craig Ave., Manhattan, NV 89022 [R] - (256) 534-7698 - Contact Referral <input type="checkbox"/> 05:30PM - 07:00PM - Call - Zeus Corp - 831 W Boland Park, Cincinnati, OH 45201 [B] - Tax Calculation
Wednesday March 1 2006	Thursday March 2 2006
	<input type="checkbox"/> 11:15AM - 12:15PM - Appointment - Iverson, Maureen - 3134 Busy St., Phoenix, AZ 85008 USA [B] - (714) 824-6790 - Product Information - Zen Life Product - Launched recently - need to get the product information brochures <input type="checkbox"/> 02:00PM - 02:30PM - Appointment - Porter, Steve <input type="checkbox"/> All Day Event - Project - BWN Financial - 123 E. Green Street, Pasadena, CA 91106 LOS ANGELES [B] - Product Training - Attend the Product Training classes <input type="checkbox"/> All Day Event - Meeting - Smith, Franklin & Sobers - 3883 Wilshire Blvd., Los Angeles, CA 90013 [B] - (626) 422-9389 - Referral Bonus - Bonus Check <input type="checkbox"/> 07:00PM - 08:30PM - Appointment - Nakano, Jeffrey - 1138 Diamond Ave, Pasadena, CA 91109 [R] - (626) 844-0100 - Business Meal - Collect Referral
Friday March 3 2006	Saturday March 4 2006
<input type="checkbox"/> 10:00AM - 10:30AM - Call - Bamaby, Christine - (626) 585-9748 - New Product Launch	
	Sunday March 5 2006

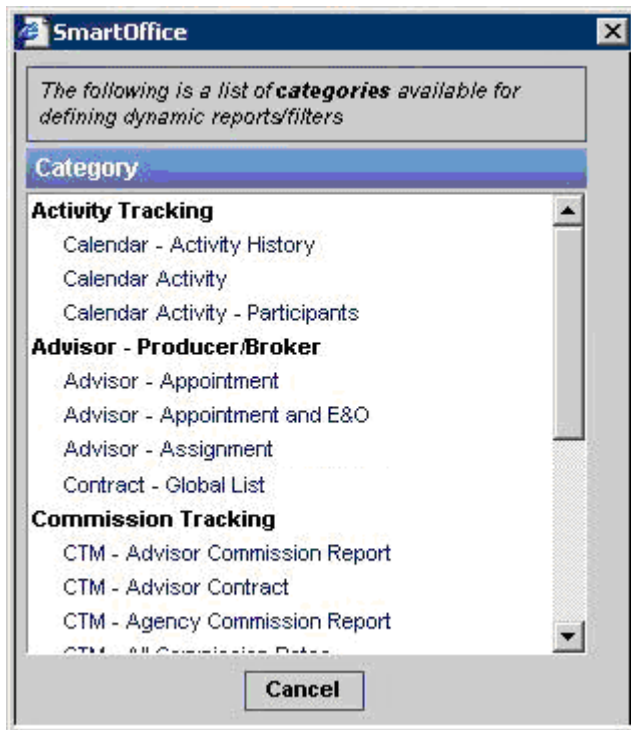
Dynamic Reports

Dynamic Reports provide a powerful user-definable reporting method, enabling users to define the columns to display in a report and select filters to limit the data appearing on the report. The ability to retrieve data by running a report is indispensable. A user must have the Allow Dynamic Reports Maintenance Office Setup option to access the Dynamic Reports feature. For the Calendar/Activity module, Dynamic Reports can be created for two categories:

- Calendar Activity.
- Calendar – Activity History.

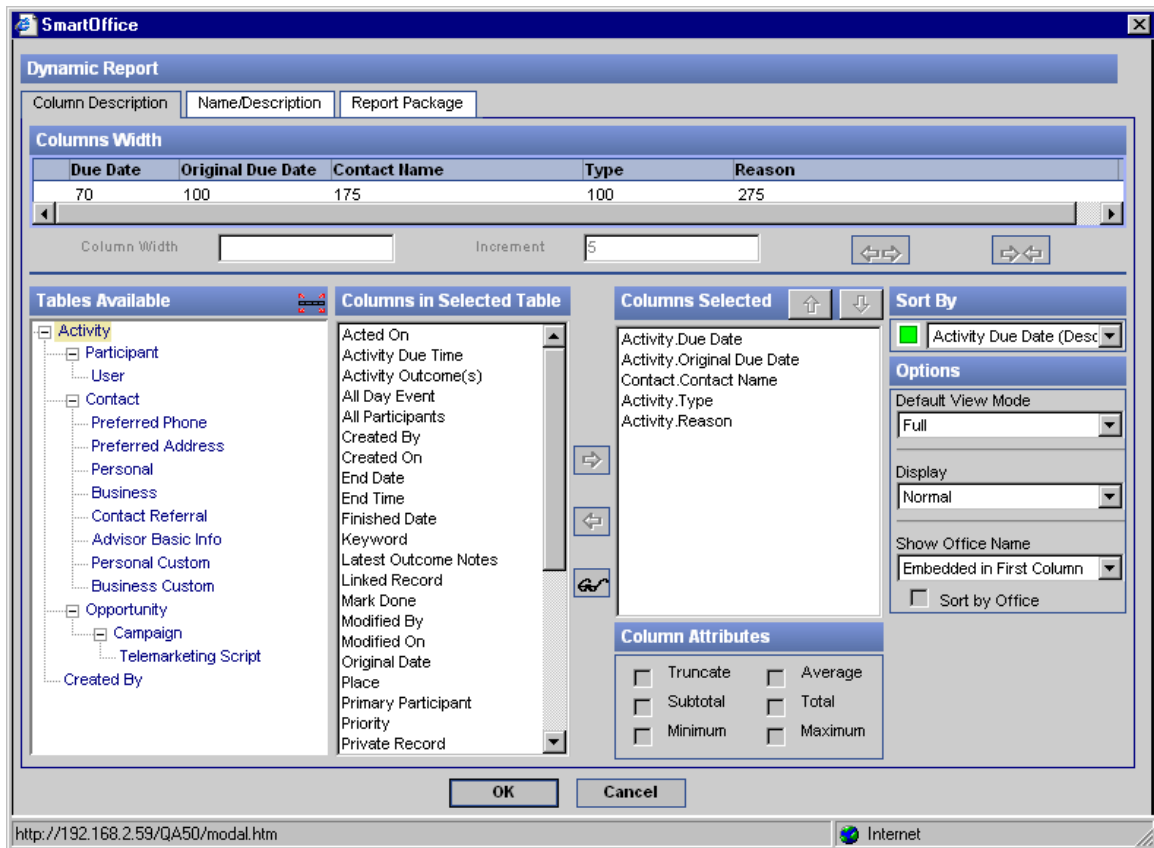
Creating a Dynamic Report

1. Select **Dynamic Reports** from the expanded **Reporting/Marketing** menu to open the Search Dynamic Reports dialog box.
2. Click **Search** to open the Dynamic Report Summary.
3. Click the **Add** button to open the Category dialog box.



4. Select a category (e.g., Calendar Activity) for the report. The category determines the type of information that will be available to include in the report.

- Click the **OK** button to open the Column Description dialog box.



- Select the columns to be included on the report from the list of Columns Available by clicking on the appropriate column and then clicking on the **Right Arrow** button. To view the additional available columns, select a different table in the Tables drop-down list. Define the sort order for the report by selecting a column in the Sort By drop-down list. Select the **No Horizontal Scrolling of First Column** option in the Options section to make the first column constant.
- Tables available for calendar activities are Activity, Contact, Preferred Phone, Preferred Address, Personal, Business, Opportunity, Campaign, Telemarketing and Created By. Tables available for Calendar - Activity History are Activity History, Activity, Opportunity, Contact, Personal and Business.
 - Adjust Column Widths by clicking on the hyperlink for the name of the column to be changed and then enter a new value in the Column Width field.

- Click the **Name/Description** tab.

- Enter a Report Name, a Report Class (optional), Keywords (optional) and a Description (optional).
- Click the **Add** button in the Selected Filter List section. Search for Filters and add one or more filters to the report definition. Any Filters added after the first are joined by an AND or OR operator link. If the AND operator is used, members will only be added to the Report if the criteria in all Filters are met. If the OR operator is used, members will be added if the criteria in one or multiple Filters are met. Change the link operator by pointing to the operator and clicking it. The operator alternates between AND and OR. The **Click here to change the filter parameters at run time** option can be selected to change the filter at run time.
- Click the **OK** button to complete the process.

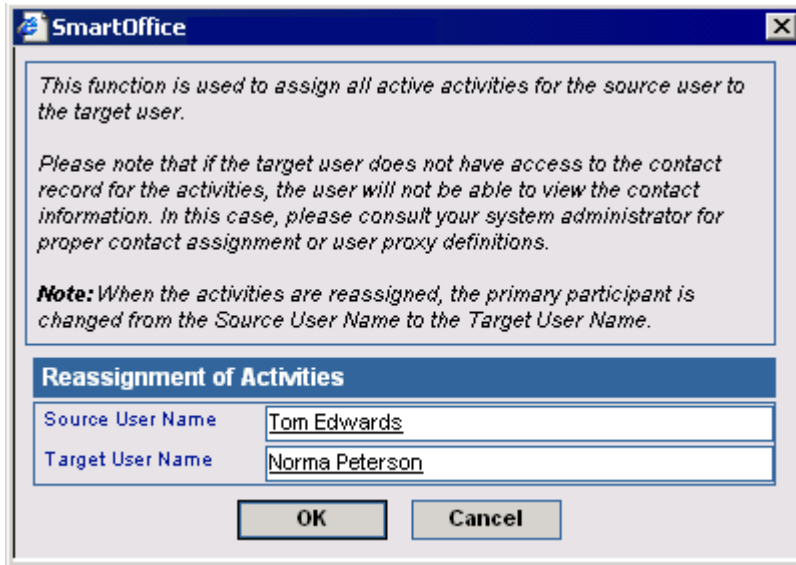
Running a Dynamic Report

- From the Dynamic Report Summary, click the Report Name hyperlink.
- From the Dynamic Report Summary, select the report and then click the **Run Report** button.
- From the Activity Search spreadsheet, click the **Run Dynamic Report** button.

Reassignment of Activities

This feature is used to assign all future active activities from a source user to a target user. The current user and proxy users are listed in the Available Users dialog box for reassignment of activities. A user must enable the Allow Mass Assignments Office Setup option to reassign activities.

If the target user does not have access to the contact record for the activities, the user will not be able to view the contact information. Activity reassignment will not preserve the primary participant from the Source User Name to the Target User Name. The Reassign Activities button is available from the DayView, AgendaView, WeekView, MonthView and Overdue Projects tabs.



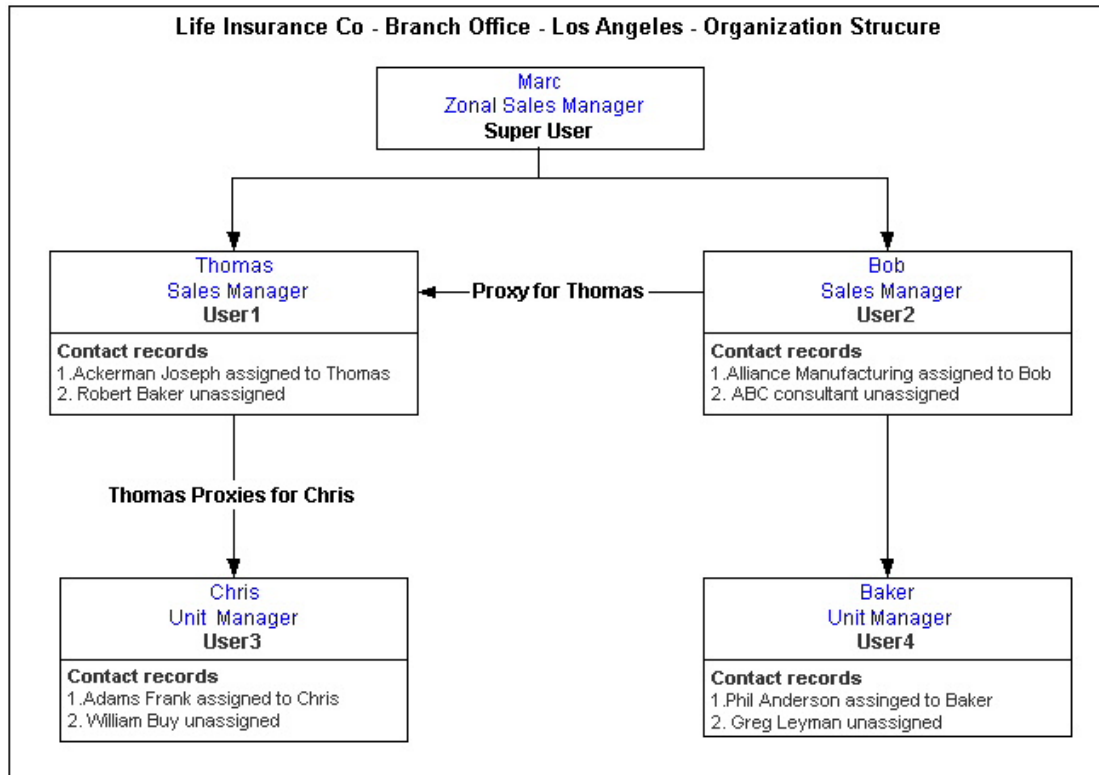
Procedures to Reassign Activities

1. Click the **Source User Name** hyperlink to select the source user from the Available Users from Logged In Office dialog box.
2. Click the **Target User Name** hyperlink to select the target user from the Available Users from Logged In Office dialog box.
3. Click the **OK** button to open the confirmation dialog box.
4. Click the **Yes** button to end the process; click the **No** button to cancel the process.

Appendix A - Set up the Office

Office Security Enabled

This section deals with the functionalities that behave differently due to the enabling of Office Security. The functionalities are illustrated with the sample organization structure of Life Insurance Co., Los Angeles Office.



Add an Activity

Create Calendar Activity for all Users = Disabled

Proxy Setting

A user with proxies and the Activity Creation option: Create Calendar Activity for All Users = Disabled is able to add activities for all contact records in the Office based upon the accessibility of the contact records. The accessibility for a user depends on the user assignment and the proxy setting.

If a contact is unassigned to any users in the office, all the users in the office are able to view that contact record and the current user is able to schedule an activity for the unassigned contact. Any user in the Office can be selected as a Participant.

If a contact is assigned to the current user, the user will be able to schedule activities for that contact and select the participants for the activity on the Proxies for the Current User tab. For example, Thomas will be able to schedule an activity for Ackerman, Joseph with the participants as Bob and Marc, as Marc and Bob have access to the Joseph Ackerman contact record. If Thomas wants to schedule an activity for Robert Baker (Unassigned), he can add an activity with participants as all users (Bob, Chris, Marc) in the Los Angeles office as participants.

Super User

The Super User setting overrides proxy settings and user assignments. A user with the Super User setting is able to add activities for all non-privatized contacts in the office. For example, Marc will be able to create activities for all the users in the Los Angeles Office, as he has access to all non-privatized contact records.

Create Calendar Activity for all Users = Enabled

Proxy Setting

A user with the Create Calendar Activity for all Users = Enabled setting can add activities for all users in the office even if the user does not have access to a particular contact. While scheduling activities for contacts for which the current user does not have rights, only partial information of the contact is shown. When the Create Calendar Activity for All Users option is enabled, the partial information available for searching contacts in the Contact Search Options dialog box is as follows:

Individual Contact:

Table	Column
Contact	Last Name First Name Middle Name Greeting Contact Title Contact Name Suffix Employer Compact Name First Last Name First and Last Initial Type
Address	City State
Advisor Basic Info	Advisor Name

Business Contact:

Table	Column
Contact	Business Name
Address	City State
Advisor Basic Info	Primary Advisor

For example, Thomas can add activities for the contacts of users Baker and Chris when the Create Calendar Activity for all Users in the Office option is enabled in the Los Angeles Office. Thomas can search for all contacts in the Los Angeles office and list them using the List All Contacts in the Office option provided in the Contact Search Options dialog box.

Note that this option is available only when the Create Calendar Activity for all Users in the Office option is enabled. Also note that users will be able to view only partial information related to the contact records of other users for whom the visibility or accessibility is not provided.

Reports

The current user will be able to run the Calendar Activity and Activity Statistics reports for other users only if the Group Reporting user role is enabled. If the Group Reporting user role is not available, the user will not be able to generate reports for anyone else.

This Function is Not Available

A user who has group reporting rights and does not have rights to view other user activities will not be able to generate Calendar Activity and Activity Statistics reports for other users.

For Users within the Proxy Domain

A user who has group reporting and calendar viewing rights for other users within the proxy domain will be able to generate reports only for those users for whom he/she proxies for. For example, if Thomas needs to generate a report for Chris only, the option can be selected in the User Management of Thomas to provide him with the Allow Group Reporting user role.

For All Users within the Office

A user that has group reporting rights that can view all users in the Office will be able to generate reports for all users in the office. For example, if Thomas needs to generate reports for all the users in the Office, selecting this option in Thomas' User Management area as well as selecting the Allow Group Reporting user role, will enable Thomas to create reports for all users in the Office.

Reports and Super User

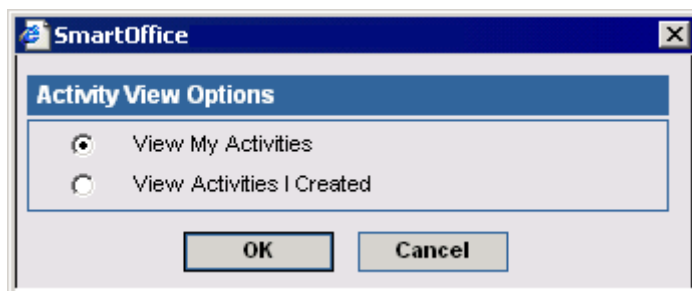
The Super User setting will override the User Management setting. A Super User is able to generate reports for any user in the office. For example, Marc is able to generate reports for all users in the Los Angeles office, as he is a Super User.

Activity View Options

User Management Setting: This Function is not Available

A user having the user management setting will not be able to view the activities of other users. They will be able to use the following options:

- View My Activities
- View Activities I Created



For example, when this option is selected for Thomas, he will not be able to view the activities of the other users in the Los Angeles Office.

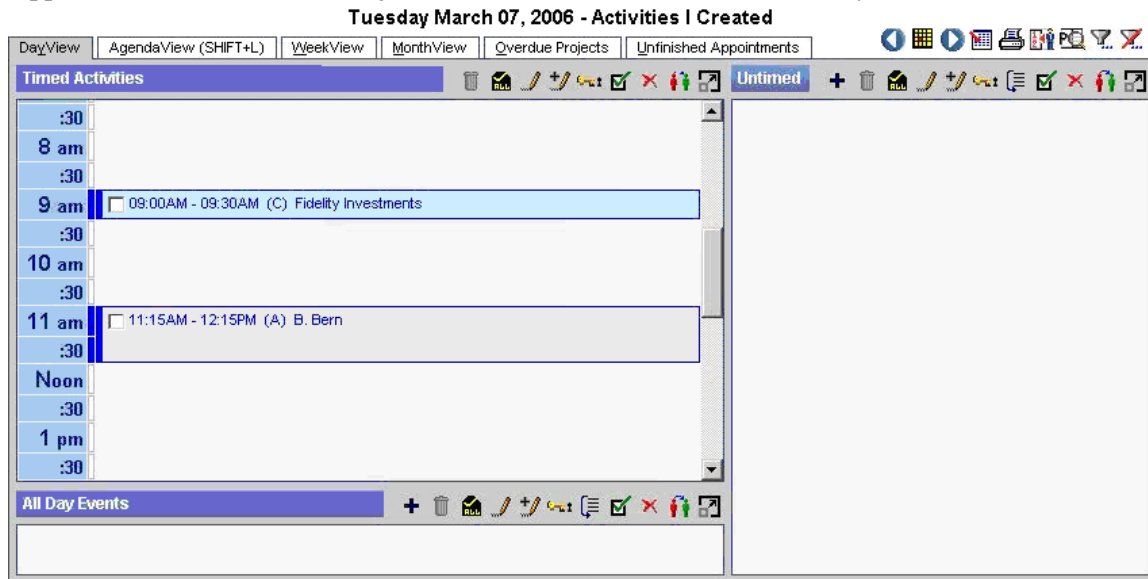
View My Activities

Select the **View My Activities** option and then click the **OK** button to view the activities for which the current user is the participant. The activities are displayed in different calendar views.

View Activities I Created

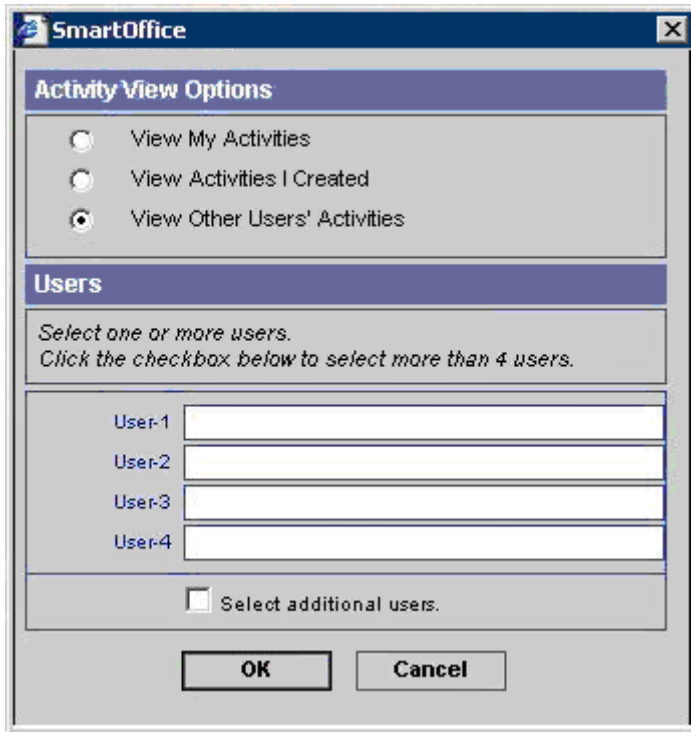
Select the **View Activities I Created** option and then click the **OK** button to view the activities created by the current user.

If the current user views the activities created by himself/herself, the Agenda View, Unfinished Appointments and Overdue Projects tabs are not available due to security reasons.



User Management Setting: For Users within the Proxy Domain

A user having this setting will be able to view the activities of other users who are in the proxy domain.



User Management Setting: For All Users in the Office

The user is able to view the activities for all users in the office when the For All Users in the Office option is enabled. However, the user is not able to view the details of the activity if it is marked as Private and if the current user does not have access to the contact record for which the activity is scheduled.

The user is able to select the other users from the List of Users displayed in the Activity View Options dialog box. The user can select the following different combinations of users:

1. Select a proxy user to view the activities.
 - The display of activities is similar to the View Other User's Activities within Proxy Domain option. The list of users displayed in the List of Users dialog box depends upon the proxy setting.
2. Select a non-proxy user to view the activities.

The display of activities is restricted. The restrictions are as follows:

- The list of users displayed in the List of Users dialog box lists all the users in an office. If the enterprise view is on, the List of Offices dialog box displays followed by the List of Users.
- The SmartOffice user is able to select multiple users for viewing the activity.
- The user is able to view the time of the activity, type of activity and contact name in the Calendar view. The user cannot modify the activity or view the details of the contact.

- The AgendaView, Overdue Projects and Unfinished Appointments tabs are not displayed. When the user tries to access these from the side menu, the user is given a warning message.
 - The user is not able to display the SmartPad details for the contact for which the current user does not have access.
 - The user is not able to use the Make/Receive a Phone Call and the Timer features in the global toolbar.
 - Appointment Confirmations are not sent when the user adds an activity for the contact for which he/she does not have access.
3. Select a non-proxy and proxy user to view their activities.
- The display of activities is similar to the non-proxy user with the restricted view.
 - The list of users selected while viewing other users' activities for the last session can be stored and recalled for a new session. This enhances the usability of Activity View Options for an Agency Manager to have the settings of his/her assistants in his/her calendar views. While viewing other users' activities using Activity View options, a Show Users List for Viewing Other Users' Activities button is displayed for listing the users selected for viewing activities.

Office Security Disabled

Add an Activity

If the office security is disabled, users in that office are able to create activities for all contact records that are non-privatized.

Reports

The current user in an office security disabled office is able to generate reports for all users in that office.

Activity View Options

The current user is able to view all non-privatized activities of other users.

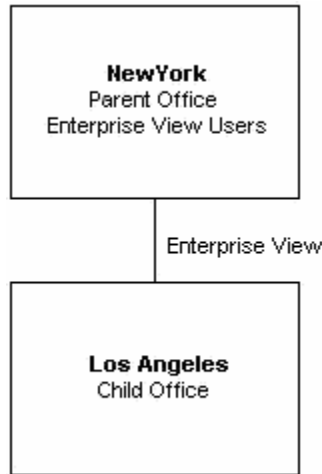
Enterprise View

Add an Activity

A user having the Enterprise View privilege is able to view the contacts of the child office and is able to schedule activities for the non-privatized contact records of the child office.

The Enterprise View rights under the Administrator User Roles section must be enabled for any user to Enterprise.

An Enterprise user in the New York Office is able to generate reports for the users in the Los Angeles Office.

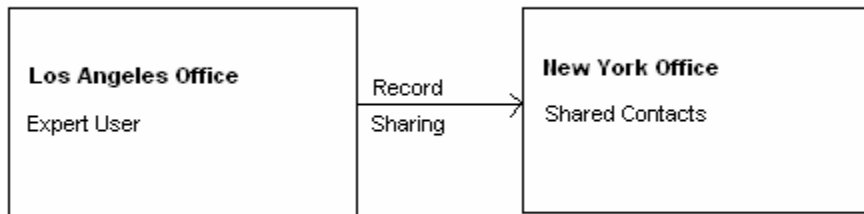


For example, an Enterprise user in the New York office is able to add an activity for all non – privatized contact records of the Los Angeles Office.

Record Sharing

Add an Activity

An Expert office user is able to create an activity for the shared record with the shared user as a participant.



The Act as Specialist for any Owner option must be selected under the Record Sharing Option in User Preferences for any user to enable record sharing. In this way, a Specialist or Expert user is able to access all shared records. An Expert user has access over the privatized shared records as well. For example, an Expert user in the Los Angeles office is able to add an activity for the shared contact from the New York office.

Reports

A SmartOffice user having the Enterprise View privilege is able to generate reports for users in the child office. This is not applicable for record sharing.

Activity View Options

A SmartOffice user is able to view the activities of the child office users. This is not applicable for Record sharing. For example, an Enterprise user in the New York Office is able to view the activities of the users in the Los Angeles Office. This is not applicable for record sharing.

Whenever the user switches the Enterprise View option other than Enterprise View Off, the Activity View Option defaults to the View My Activities option, displaying the activities of the current user. The list of users selected for viewing other users' activities in the Enterprise View mode is not saved

Appendix B - Activity Outcome

Activity Outcome Wizard

Activities of all types (except Personal) and individual recurrences can be tracked. Activity tracking signals certain actions that generate Activity History records. The advantage of tracking is that a statistical analysis of actions can be seen using the Activity Statistics report. The History tab is added to the Activity Detail dialog box so that the links to Activity History records can be viewed. Furthermore, if the activity type is a Call or Activity, it triggers the corresponding version of the Activity Outcome Wizard to open when these Activities are marked as Done.

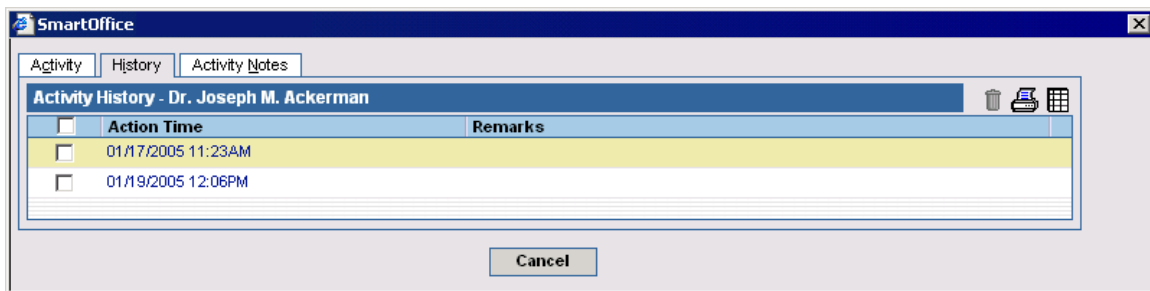
Activity Outcome Tracking acts as a timesaving automation tool to quickly and easily record the Outcomes and automatically initiate certain actions. There are two main types of Activity Outcome wizards:

- Call Outcome Wizard.
- Appointment Outcome Wizard.

In order to track the outcome of a Call or Appointment Activity using the Activity Outcome Tracking Wizard, the Tracked option on the Activity Detail dialog box must be selected.

The Call or Appointment Outcome Wizard opens when an activity is marked as Done, depending on the type of activity.

After changing the scheduling of an activity, a user is able to view the history of the activity record in the Activity History tab and the activity notes on the Activity Notes tab of the Activity Detail dialog box.



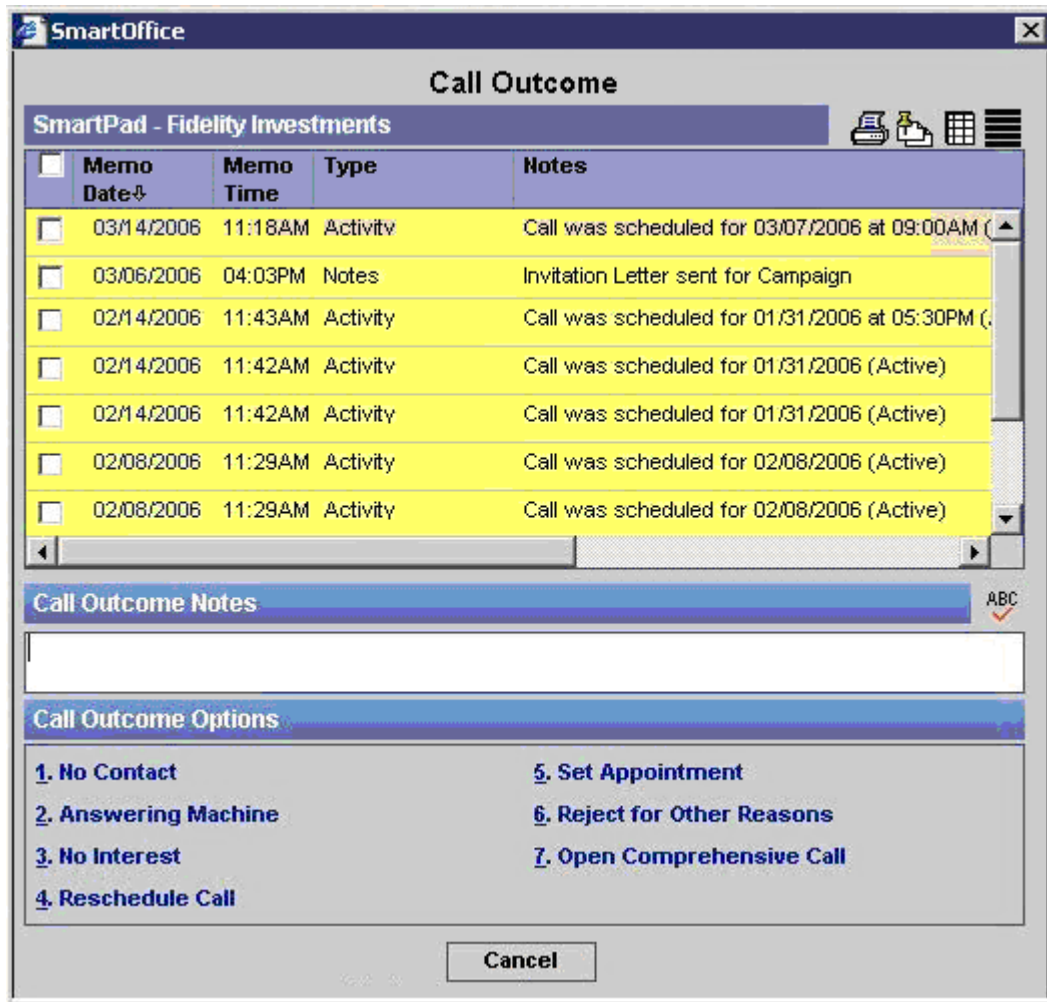
Call Activity Outcome Wizard

There are two types of Call Outcome Wizards for tracking the outcomes of Call activities. The type of outcome wizard required can be selected from the Call Outcome Workflow Options drop-down list in User Preferences. The two types of Call Outcome Wizards:

- Simplified Call Outcome.
- Comprehensive Call Outcome.

Simplified Call Outcome Wizard

The Simplified Call Outcome Wizard consists of the ten latest SmartPad entries, the Outcome Notes Section and the Call Outcome Options. A SmartPad entry for the contact in focus helps a user to know the recent interactions with the contact so that he/she can plan his scheduled call accordingly. The Call Outcome Notes section is used to note any specific information with regard to the outcome of the call activity. There are seven Call Outcome Options that are explained below. For all call Outcome Options, the Activity History dialog box and Activity Notes dialog box are updated.



Simplified Call Outcomes

The Call Outcome Options:

- **No Contact:** If the call outcome does not establish any communication with the contact, the activity is not marked as Done. The Activity History records posted are No Contact and Contact not Made.
- **Answering Machine:** If the call outcome does not establish any communication with the contact individual and ends in an automated response from the contact as the reply, the activity will not be marked as Done. The Activity History records posted are Answering Machine and Contact Not Made.

- **No Interest:** If the contact shows no interest for the purpose of the call, then the activity is marked as Done. The Activity History records posted are No Interest and Contact Made. The contact type of the individual contact for which the activity is scheduled and marked as Done is changed to Reject.
- **Reschedule Call:** If the call needs to be rescheduled without any dials made, then the user can reschedule the Call using this option. Selecting this option opens the Date and Time Picker dialog box from which the user can select the date and time to reschedule.
- **Set Appointment:** When the outcome of the call activity sets an appointment with the contact Individual, the user can select this option as an outcome for the scheduled call activity. Selecting this option opens the MonthView and an Appointment activity can be added on the appropriate date and time. The call activity scheduled is marked as Done upon selecting this option.
- **Reject for Other Reasons:** This option marks the scheduled activity as Done when selected and the contact type of the individual for whom the activity is scheduled is changed to Reject. The Activity History records posted in the Activity Detail dialog box are Reject for Other Reasons and Contact Not Made.
- **Open Comprehensive Call:** Select this option to track the activities using the Comprehensive Call Outcome Wizard. When selected, the Simplified Call Outcome Wizard closes and the Comprehensive Call Outcome Wizard opens up to record the outcomes for the Activity.

Activity History Records for Various Outcomes

Outcomes	Activity History
A New Activity is added	Activity Created
No Contact	Dial Made Contact Not Made
Answering Machine	Dial Made Contact Not Made Answering Machine
No Interest	Dial Made Contact Made No Interest
Reschedule Call	Reschedule Call Activity Created
Set Appointment	Dial Made Contact Made Enter Scheduled Appointment
Reject for Other Reasons	Dial Made Contact Not Made Reject for Other Reasons
Open Comprehensive Call (depends on the options selected)	Contact Made

Comprehensive Call Outcome Wizard

This wizard enables a user to enter the Main and Additional Outcomes for tracked call activities.

The two main outcomes of a call activity:

- Contact Made
- Contact Not Made

A Comprehensive Call Outcome Wizard dialog box is divided into the following sections:

- **Actual Date and Time for the Activity**
 - This section displays the Contact Name, Date and Time of the scheduled activity that is marked as Done. A user can view the details of the contact and activity by clicking the Contact and Activity hyperlinks respectively.
 - By default, this section displays the original date and time entered for this activity. However, the date and time can be changed to any values by clicking the **Pick Date and Time** button. When the Date and Time dialog box opens, specify the date and time. Enter a number in the Duration field and then select a time from the Unit drop-down list.
 - Note that the date and time of the activity in the Date and Time section cannot be changed to any time in the future.
- **Main Outcome**

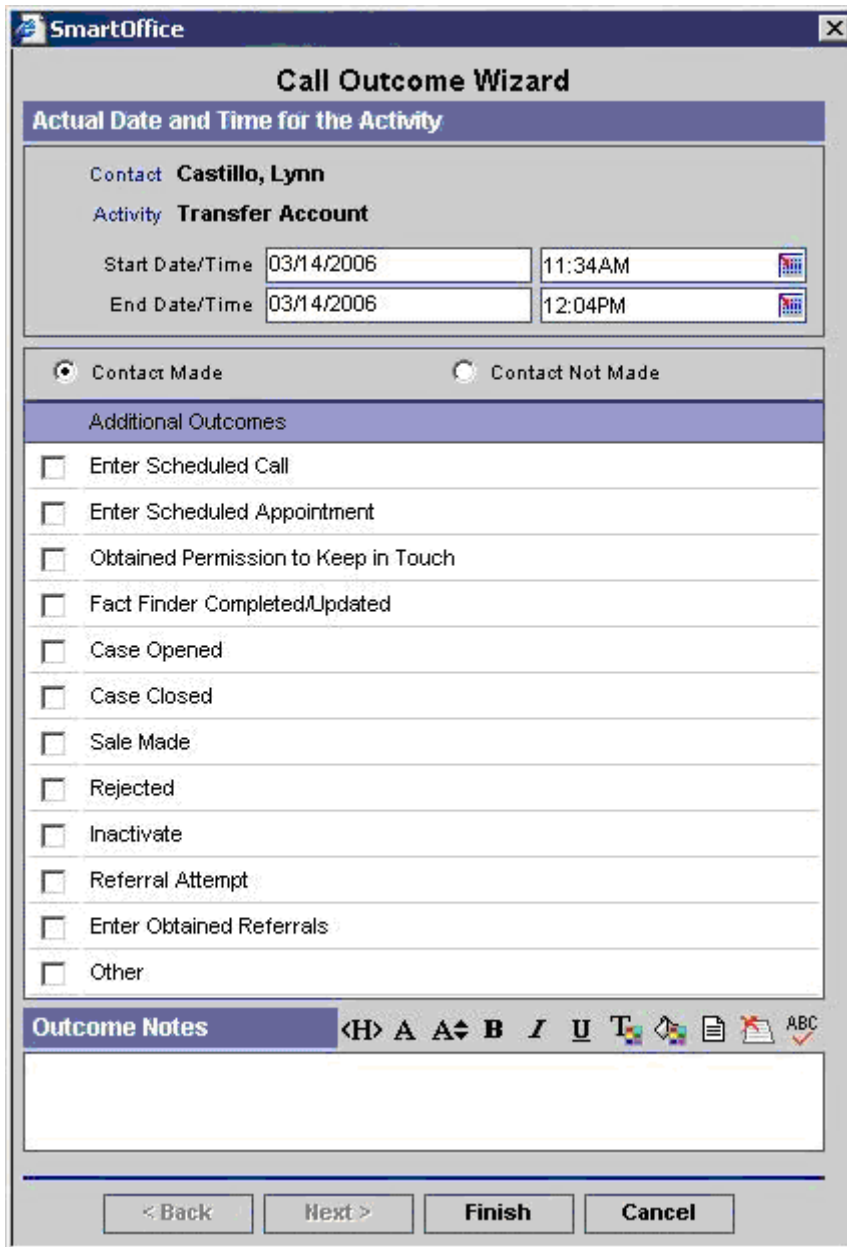
Selecting either the **Contact Made** or **Contact Not Made** options in the Main Outcomes section swaps the Additional Outcomes section based on the Main Outcome selected. The selection of one of these Main Outcomes also determines the History of the activity records.
- **Additional Outcomes**

The logic governing the outcomes that may be selected together varies with each Additional Outcome list dialog box. If an additional outcome has been selected, the Finish button is disabled. The user must click the **Next** button to proceed. The dialog boxes that pertain to each additional outcome will subsequently display based on the order in which they appear in the list.
- **Outcome Notes**

Enter any comments into the Outcome Notes field. This text appears in the Activity History record for the Main Outcome (e.g., Contact Made) for the Activity.
- **Opportunity**

This section is shown when an activity is linked to an opportunity and the activity is marked as Done. The user will be able to change the stage of the Opportunity based on the Opportunity setup defined in the Opportunity module.

Contact Made Outcomes



The image shows a screenshot of the 'SmartOffice' application window, specifically the 'Call Outcome Wizard' dialog box. The window title is 'SmartOffice' and it has a standard Windows-style title bar with a close button. The main title of the dialog is 'Call Outcome Wizard'. Below the title, there is a section titled 'Actual Date and Time for the Activity'. This section contains the following information: 'Contact' is 'Castillo, Lynn', 'Activity' is 'Transfer Account', 'Start Date/Time' is '03/14/2006' at '11:34AM', and 'End Date/Time' is '03/14/2006' at '12:04PM'. Below this, there are two radio buttons: 'Contact Made' (which is selected) and 'Contact Not Made'. Underneath, there is a section titled 'Additional Outcomes' with a list of checkboxes for various outcomes: 'Enter Scheduled Call', 'Enter Scheduled Appointment', 'Obtained Permission to Keep in Touch', 'Fact Finder Completed/Updated', 'Case Opened', 'Case Closed', 'Sale Made', 'Rejected', 'Inactivate', 'Referral Attempt', 'Enter Obtained Referrals', and 'Other'. At the bottom of the dialog, there is a section titled 'Outcome Notes' with a rich text editor toolbar containing icons for bold, italic, underline, text color, background color, bulleted list, numbered list, and a checkmark. Below the notes area are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

SmartOffice

Call Outcome Wizard

Actual Date and Time for the Activity

Contact **Castillo, Lynn**
Activity **Transfer Account**

Start Date/Time 03/14/2006 11:34AM
End Date/Time 03/14/2006 12:04PM

Contact Made Contact Not Made

Additional Outcomes

- Enter Scheduled Call
- Enter Scheduled Appointment
- Obtained Permission to Keep in Touch
- Fact Finder Completed/Updated
- Case Opened
- Case Closed
- Sale Made
- Rejected
- Inactivate
- Referral Attempt
- Enter Obtained Referrals
- Other

Outcome Notes <H> A A B I U T [Color] [Background Color] [List] [Checkmark]

< Back Next > Finish Cancel

Contact Not Made Outcomes

Main Outcome - Contact Made	Main Outcome - Contact Not Made
<ul style="list-style-type: none"> • Additional Outcomes • Enter Scheduled Call • Enter Scheduled Appointment • Obtained Permission to Keep in Touch • Fact Finder Completed/Updated • Case Opened • Case Closed • Sale Made • Rejected • Inactivate • Referral Attempt • Enter Obtained Referrals • Other 	<ul style="list-style-type: none"> • Additional Outcomes • Reschedule Call • Rejected • Inactivate • Other

Appointment Outcome Wizards

The Appointment Outcome Wizard dialog box is similar to the Call Activity Outcome Wizard dialog box, the difference being that the Main Outcomes are available. The Main Outcomes that are available here are Appointment Completed and Appointment Not Completed. The Various additional outcomes are listed below.

Main Outcome - Appointment Completed	Main Outcome - Appointment Not Completed
<ul style="list-style-type: none"> • Additional Outcomes • Scheduled Call for Follow-up • Enter Scheduled Appointment • Obtained Permission to Keep in Touch • Fact Finder Completed/Updated • Case Opened • Case Closed • Closing Interview • Sale Made • Rejected • Inactivate • Referral Attempt • Enter Obtained Referrals • Other 	<ul style="list-style-type: none"> • Additional Outcomes • Enter or Schedule Call • Enter Rescheduled Appointment • Reschedule Appointment • Rejected • Inactivate • Referral Attempt • Enter Obtained Referrals • Other

Appointment Completed

The Appointment Outcome Wizard for the Appointment Completed outcome is shown below.

The screenshot shows the 'Appointment Outcome Wizard' window in SmartOffice. The window title is 'SmartOffice Appointment Outcome Wizard'. The main heading is 'Appointment Outcome Wizard'. Below this, there is a section titled 'Actual Date and Time for the Activity'. This section contains the following information:

- Contact: **Chevaux, Henry Gerome**
- Activity:
- Start Date/Time: 03/14/2006 11:00AM
- End Date/Time: 03/14/2006 11:30AM

Below the date and time fields, there are two radio buttons for selecting the appointment status:

- Appointment Completed
- Appointment Not Completed

The next section is 'Additional Outcomes', which is a list of checkboxes for selecting additional outcomes:

- Schedule Call for Follow-Up
- Enter Scheduled Appointment
- Obtained Permission to Keep in Touch
- Fact Finder Completed/Updated
- Case Opened
- Case Closed
- Closing Interview
- Sale Made
- Rejected
- Inactivate
- Referral Attempt
- Enter Obtained Referrals
- Other

Below the list is a section titled 'Outcome Notes' with a rich text editor toolbar containing icons for bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, print, and spell check. Below the toolbar is a text input field.

At the bottom of the window, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

Appointment Not Completed

The Appointment Outcome Wizard for the Appointment Not Completed outcome is shown below.

The screenshot shows the 'Appointment Outcome Wizard' dialog box in the SmartOffice application. The window title is 'SmartOffice'. The main title is 'Appointment Outcome Wizard'. Below the title is a section titled 'Actual Date and Time for the Activity'. This section contains the following information:

- Contact: Chevaux, Henry Gerome
- Activity: (empty field)
- Start Date/Time: 03/14/2006 11:00AM
- End Date/Time: 03/14/2006 11:30AM

Below the date and time fields are two radio buttons for selecting the appointment status:

- Appointment Completed
- Appointment Not Completed

Underneath is a section titled 'Additional Outcomes' with a list of checkboxes:

- Enter or Schedule Call
- Enter Rescheduled Appointment
- Reschedule Appointment
- Rejected
- Inactivate
- Referral Attempt
- Enter Obtained Referrals
- Other

Below the checkboxes is an 'Outcome Notes' section with a rich text editor toolbar containing icons for bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and a checkmark. Below the toolbar is a text area for notes.

At the bottom of the dialog box are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

Incrementing the Opportunity Stage Using the Outcome Wizard

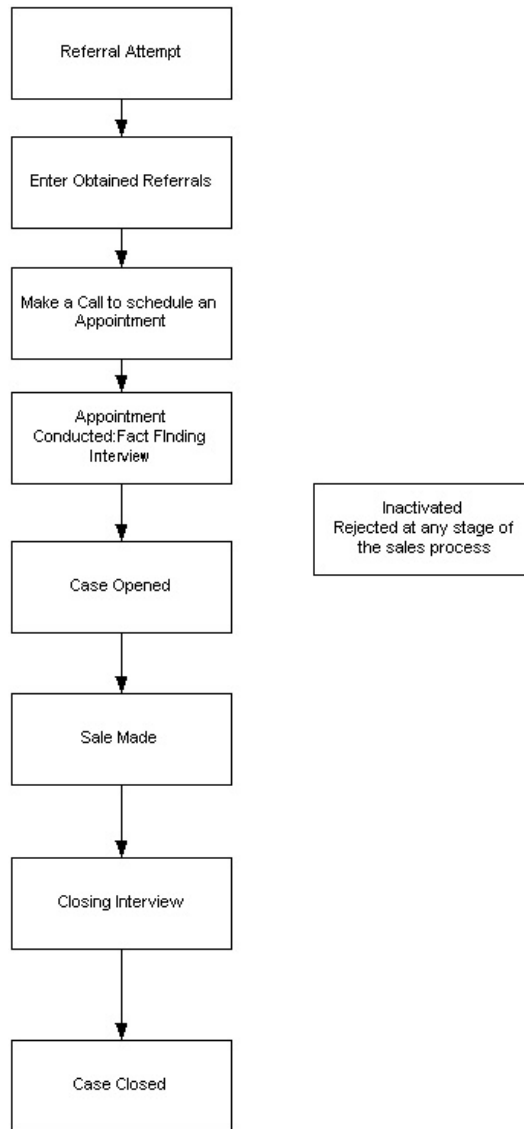
The Opportunity Stages for a Contact can be modified with the Appointment or Call Outcome Wizards.

When an activity is created for a contact that is associated with an opportunity and is marked as Done, the appropriate Outcome Wizard dialog box opens with an Opportunities section. The Current Opportunity stage will be displayed in the Opportunity Current Stage field below the Date/Time and Duration fields in the Outcome Wizard dialog box. This field is read-only. Use the Opportunity Current Stage field drop-down list to change the stage.

The various stages depend upon the Opportunity Stage definition and the Stage Setup defined by the logged in user in the Opportunity Setup.

Sales Process

The Outcome Wizards are designed for advisors to track the contacts based upon the Sales Process.



Client Acquisition Process

A Referral Attempt is an effort made by an advisor to obtain referrals. The attempt may be through a call or an appointment. After securing a referral, the next step in the client acquisition is to enter the information into SmartOffice, which is added as an Individual Contact or Business Contact record.

Scheduling a Call

The next step in the Sales process is to schedule and place a call for an appointment.

Fact Finding Interview

Keep the appointment and conduct the Fact Finding Interview to obtain the confidential details of the contact record.

Case Opened

A Case is opened if all the information necessary to complete the sale is available and the sale is expected to happen shortly.

Sale Made

This indicates that the sale was made.

Closing Interview

The Closing Interview is defined as the face-to-face conversation during which formal delivery of the product takes place, such as signing the application, etc.

Case Closed

If no more sales are expected to happen, this option is used to close the case. To perform this action, select the Case Closed option.

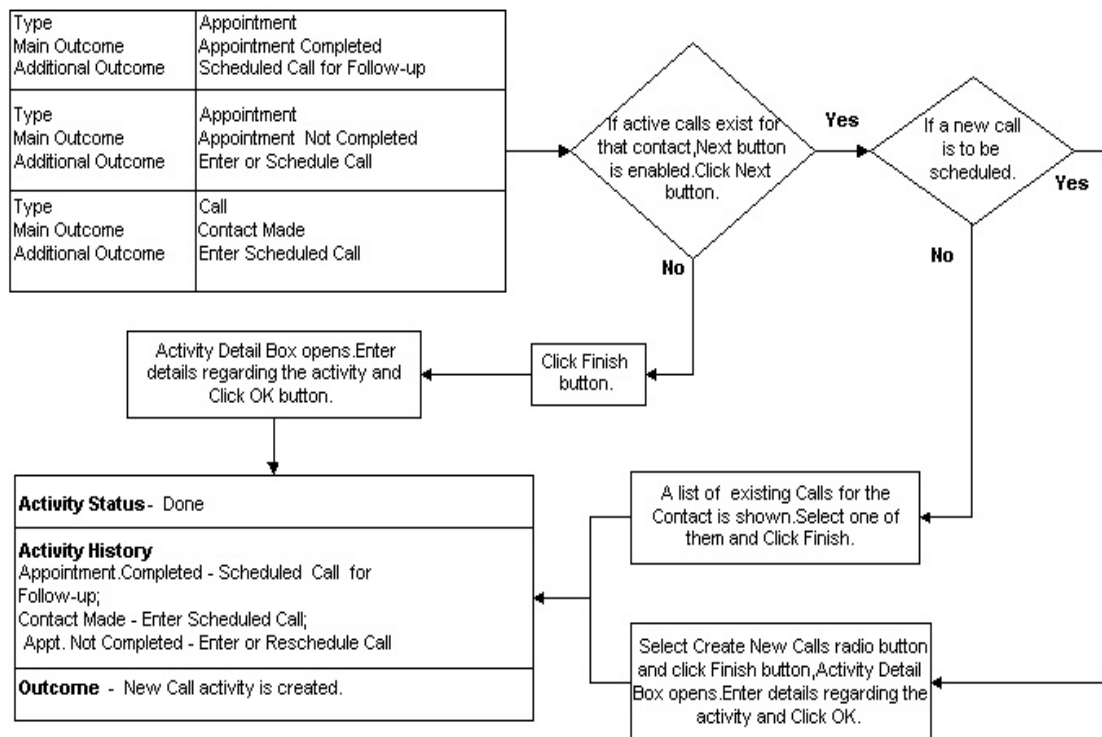
Additional Outcomes

Scheduling a Call as the Outcome of an Activity

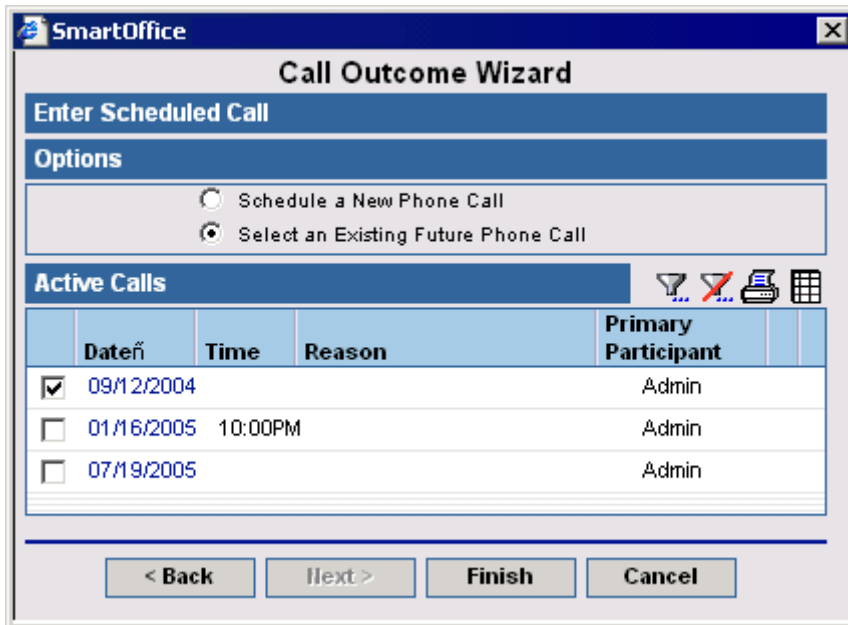
This outcome option is available in the following dialog boxes:

- **Appointment Completed** – Schedule Call for Follow-up.
- **Appointment Not Completed** – Enter or Schedule Call.
- **Contact Made** – Enter Scheduled Call.

Workflow



A user can either create a new call activity or designate a future call Activity as the follow-up Call. The system checks for any pending (still marked Active) calls scheduled for the contact. If there are any, a list of the calls displays in the Active Calls section list of the Outcome Wizard, and the Select an Existing Future Phone Call option is selected by default. If there are no such Calls, the Active Calls section is hidden and the Schedule a New Phone Call button is selected by default.



Schedule a New Phone Call

If the Schedule a New Phone Call option is selected, the Activity Detail dialog box for a new call activity opens after the user clicks the **Finish** button. The user can enter the details for the call activity in the Activity Detail dialog box.

Select an Existing Future Phone Call

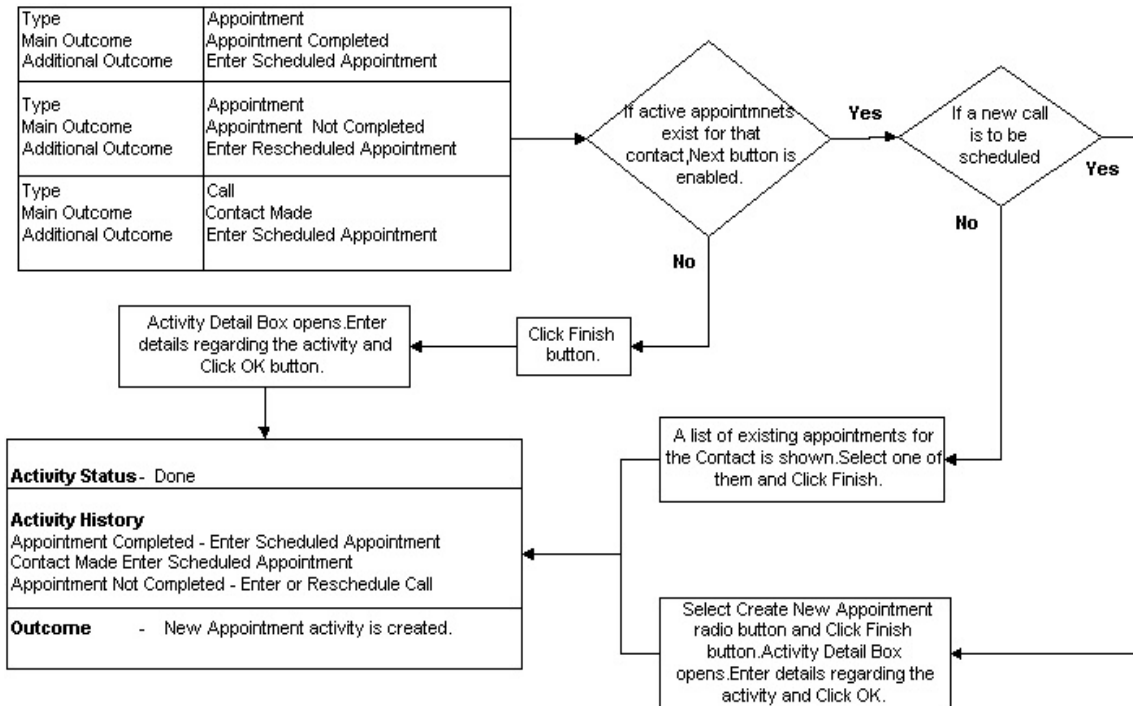
If Select an Existing Future Phone Call is selected, a list of existing Call Activities for the future date and time will be displayed. The user can tag a call activity from the list to proceed (if there is only one call on the list, it will be tagged automatically). If the activity needs to be modified, open the Activity Detail dialog box for the call by clicking on the row hyperlink under the Date column on the row corresponding to the call that needs to be modified. The user can then click the **Next** or **Finish** button to proceed or close the function.

Scheduling an Appointment as the Outcome of an Activity

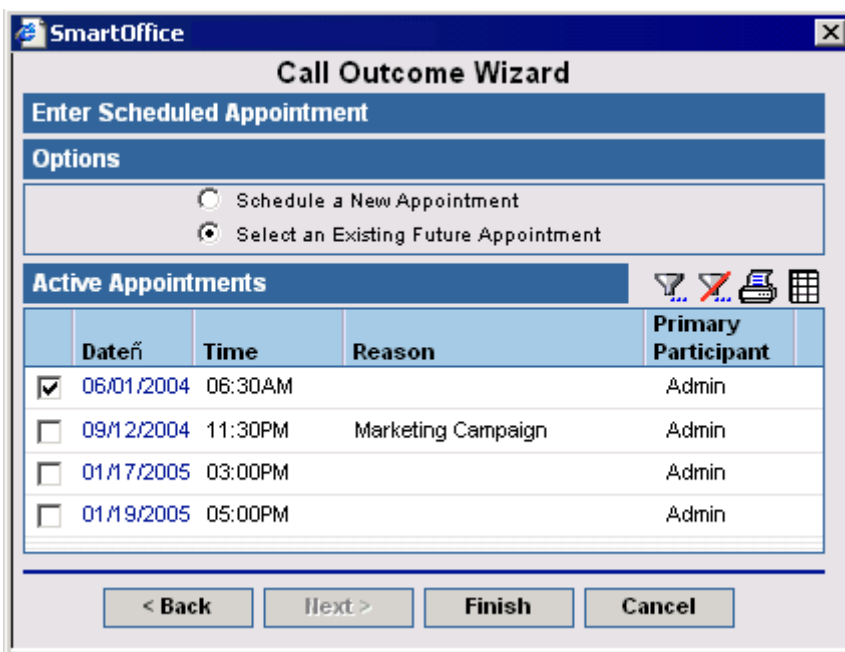
This outcome option is available in the following dialog boxes:

- **Appointment Completed** – Enter Scheduled Appointment.
- **Appointment Not Completed** – Enter Rescheduled Appointment.
- **Contact Made** – Enter Scheduled Appointment.

Workflow



The user can either Create a New Appointment Activity or designate an Existing Future Appointment Activity as the follow-up. The system checks for any pending (still marked Active) appointments scheduled for the contact. If there are any, a list of appointments displays in the Active Appointments section list when the screen opens, with the Select an Existing Future Appointment option selected by default. If there are no such Appointments, the Active Appointments section is hidden, and the Schedule a New Appointment button is selected by default.



Schedule a New Appointment

When the Schedule a New Appointment option is selected, the Finish button is enabled. After clicking the **Finish** button, the Activity Detail dialog box opens with the Appointment activity type. The user can enter the details for the Appointment Activity in the Activity Detail dialog box.

Select an Existing Future Appointment

If the select an Existing Future Appointment option is selected, the list of all available future appointment activities will be displayed and the user can select an appointment activity (if there is only one appointment activity on the list, it will be tagged automatically) and then click the **Finish** button to record the outcome.

Reschedule Call

This outcome option is available in the Contact Not Made – Reschedule Call dialog box. The user selects this Outcome if contact was not made and there is no indication that a future call is unwelcome.

Workflow



The Reschedule Call Dialog box opens, when the user clicks the **Next** button.

The screenshot shows a window titled 'SmartOffice' with a sub-window titled 'Call Outcome Wizard'. The wizard has a 'Reschedule Call' section and an 'Options' section. The 'Options' section contains a 'Start Date/Time' field with a calendar icon, a 'Subject' field, and an 'Activity Reason' field. At the bottom, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

By default, the date of the next day will display in the Date field. The user can modify the date and time in the Date/Time fields manually or by using the Pick Date and Time button. After entering the subject and the activity reason for the new Call activity, click the **Finish** button to reschedule the Call.

Reschedule Appointment

This outcome option is available in the Appointment Not Completed – Reschedule Appointment dialog box. The user selects this outcome if the appointment was not completed and there is no indication that a future Appointment is unwelcome. The activity will be marked as Done and the activity history will be updated as shown below.

Workflow



The Reschedule Appointment dialog box opens, when the user clicks the **Next** button.

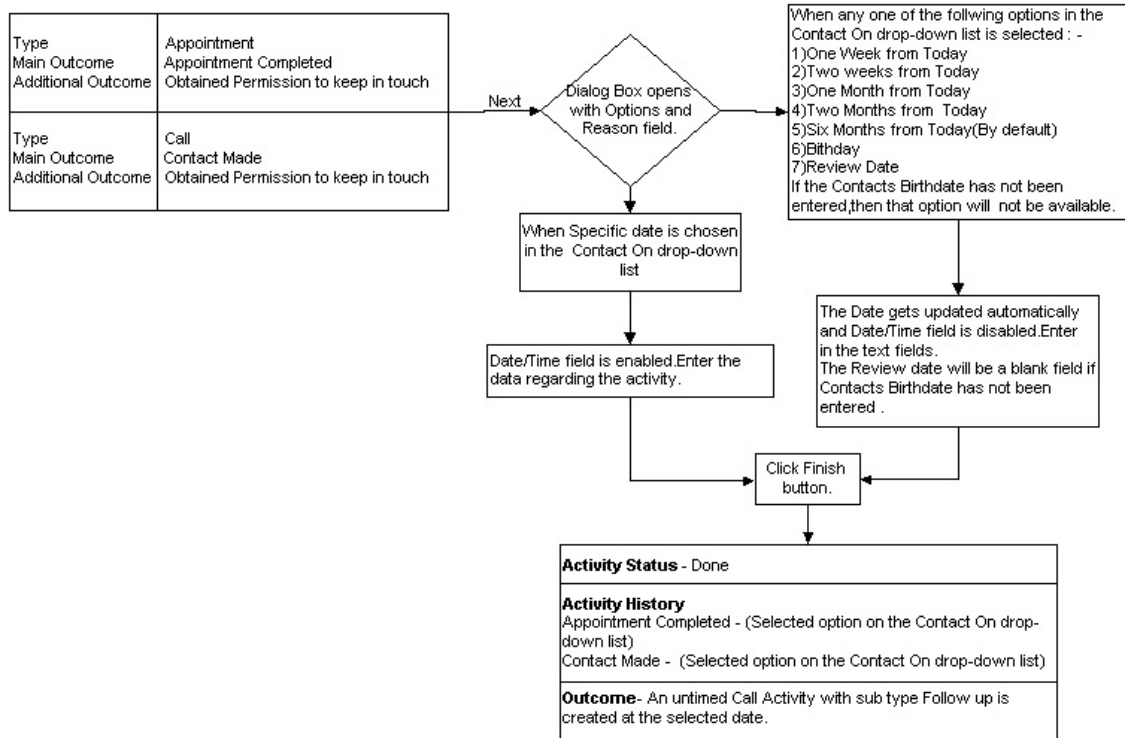
By default, the date of the next day will display in the Date field. A user can modify the date and time in the Date/Time fields manually or by using the **Pick Date and Time** button. After entering the Subject and the Activity Reason for the new Appointment activity, click the **Finish** button. The activity will be marked as Done and the Activity History will be updated.

Obtained Permission to Keep in Touch

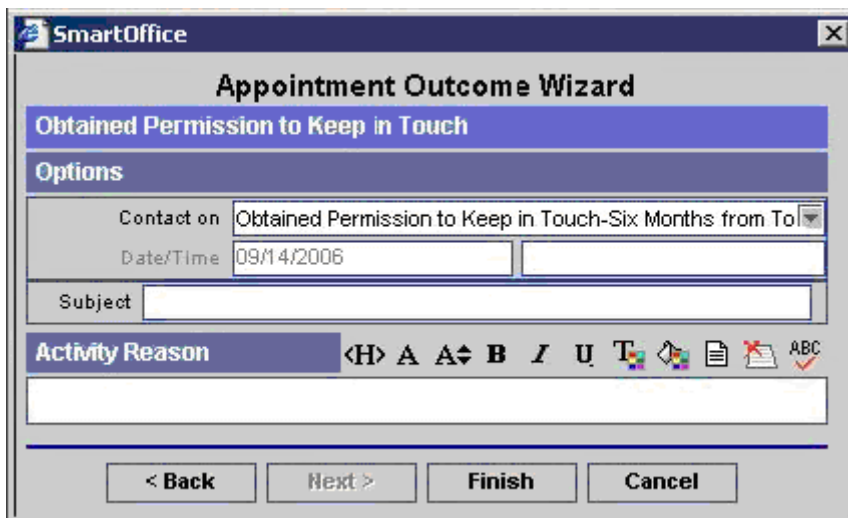
This outcome option is available in the following dialog boxes:

- **Appointment Completed** – Obtained Permission to Keep in Touch.
- **Contact Made** – Obtained Permission to Keep in Touch.

Workflow



Select the **Obtained Permission to Keep in Touch** option and then click the **Next** button to open the Obtained Permission to Keep in Touch dialog box.



The Obtained Permission to Keep in Touch dialog box consists of two sections:

- **Options:** This consists of the Contact On, Date/Time and Subject fields.
- **Activity Reason.**

A user can schedule a call activity after a specific period using this dialog box. The options available in the Contact On drop-down list are One Week from Today, Two Weeks from Today, One Month from Today, Two Months from Today, Six Months from Today, Specific Date, Birthday and Review Date.

If any one of the options such as One Week from Today, Two Weeks from Today, One Month from Today, Two Months from Today, or Six Months from Today is selected, the date corresponding to the selected period from today displays in the read-only Date field.

- If **Specific Date** is selected, the Date field will become enabled displaying today's date. To modify the date and time, use the Pick Date and Time button.
- If **Birthday** is selected, the date of the Contact's next birthday displays in the Date field in read-only mode (make sure the contact record is updated with the contacts date of birth). If the Date of Birth is not entered in the Birth Date field of the Contact record, then this option will not be available in the Contact On drop-down list.
- If **Review Date** is selected, the date scheduled for the Call activity will be six months offset from the Contact's Birthday (read-only mode). If the Contacts Date of Birth is not entered in the Birth Date field of the Contact record, then this field will be blank.

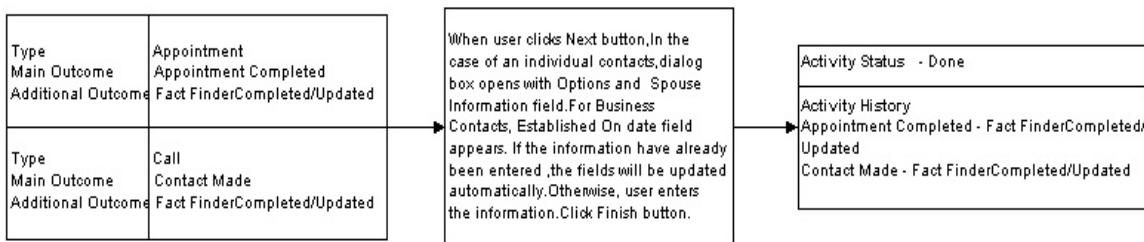
After selecting the appropriate date, click the **Finish** button.

Fact Finder Completed/Updated

This outcome option is available in the following dialog boxes:

- **Appointment Completed** – Fact Finder Completed/Updated.
- **Contact Made** – Fact Finder Completed/Updated.

Workflow



Select the Fact Finder Completed/Updated Additional Outcome and then click the **Next** button to open the Fact Finder Completed/Updated dialog box.

There are two types of Fact Finder Completed/Updated screens depending on whether the Contact is an Individual or a Business type.

Fact Finding for an Individual Contact

The screenshot shows a window titled "SmartOffice" with a sub-header "Appointment Outcome Wizard". Below this is a blue bar with the text "Fact Finder Completed/Updated". Underneath is another blue bar labeled "Options". The main area contains a form with the following fields: "Contact's DOB" with the value "02/27/1950" and a calendar icon; "Spouse Information" section with fields for "First Name" (Kathleen), "Last Name" (Ackerman), "Greeting" (Katie), "Income" (110,000), "Birth Date" (01/03/1955) with a calendar icon, and "Age" (49). At the bottom are four buttons: "< Back", "Next >", "Finish", and "Cancel".

The Options section provides the space to update the Contact's DOB. The Spouse Information section includes the First Name, Last Name, Greeting, Income, Birth Date and Age fields.

When the Fact Finder dialog box opens, the birth date of the Individual contact will display as editable in the Contact's DOB field. The user can also enter the additional information gathered about the spouse/domestic partner. If the user enters a first and last name, a Dependent (type of Individual Contact) record is created and the spouse/partner is added to the Household Members list under the Household tab with the Role as Spouse. The Dependent is also added as a Key Relation with the relationship type as Spouse.

Fact Finding for a Business Contact

The screenshot shows a window titled "SmartOffice" with a sub-header "Appointment Outcome Wizard". Below this is a blue bar with the text "Fact Finder Completed/Updated". Underneath is another blue bar labeled "Options". The main area contains a form with the following fields: "Established On" with an empty text box and a calendar icon. At the bottom are four buttons: "< Back", "Next >", "Finish", and "Cancel".

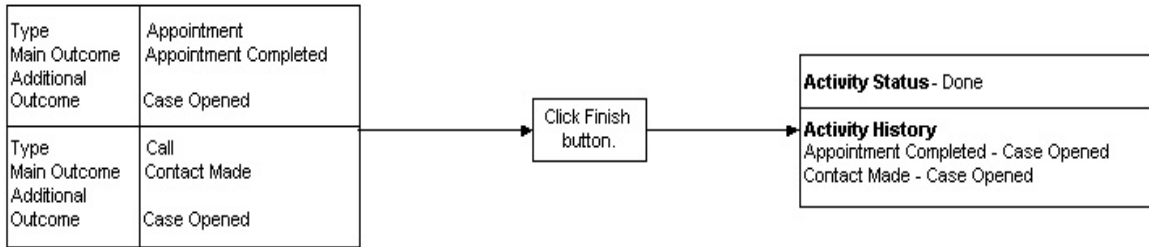
This Option is used to update the Established On date for a Business Contact. If the Established On field is not updated with any data in the business contacts Detail tab, the field will remain empty and the user can modify or enter any date using the Date and Time Picker button.

Case Opened

This outcome option is available in the following dialog boxes:

- Appointment Completed – Case Opened.
- Contact Made – Case Opened.

Workflow



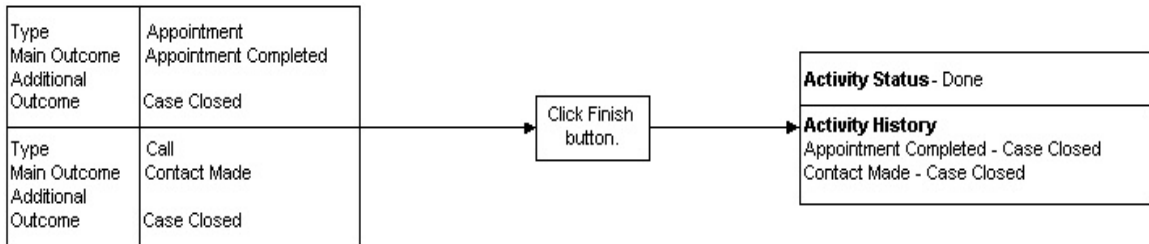
Enter notes in the Outcome Notes field and then click the **Finish** button. The activity will be marked as Done and the Activity History will be updated as shown in the workflow.

Case Closed

This outcome option is available in the following dialog boxes:

- Appointment Completed – Case Closed.
- Contact Made – Case Closed.

Workflow

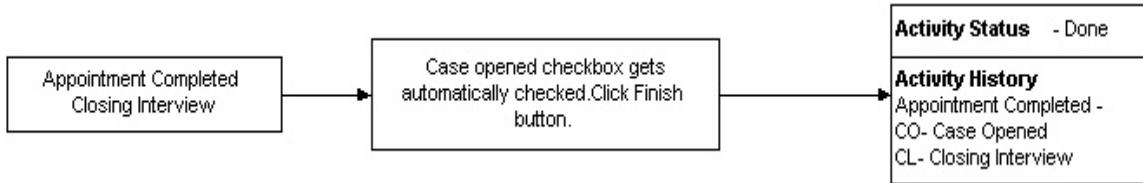


Enter notes in the Outcome Notes field and then click the **Finish** button. The activity will be marked as Done and the Activity History will be updated as shown in the workflow.

Closing Interview

Select the Appointment Completed – Closing Interview option and then click the **Finish** button. Select this outcome if the scheduled Closing Interview with a particular contact is completed. When the user selects this outcome, the Case Opened option is automatically selected since the case needs to be opened before scheduling a Closing Interview with the contact.

Workflow

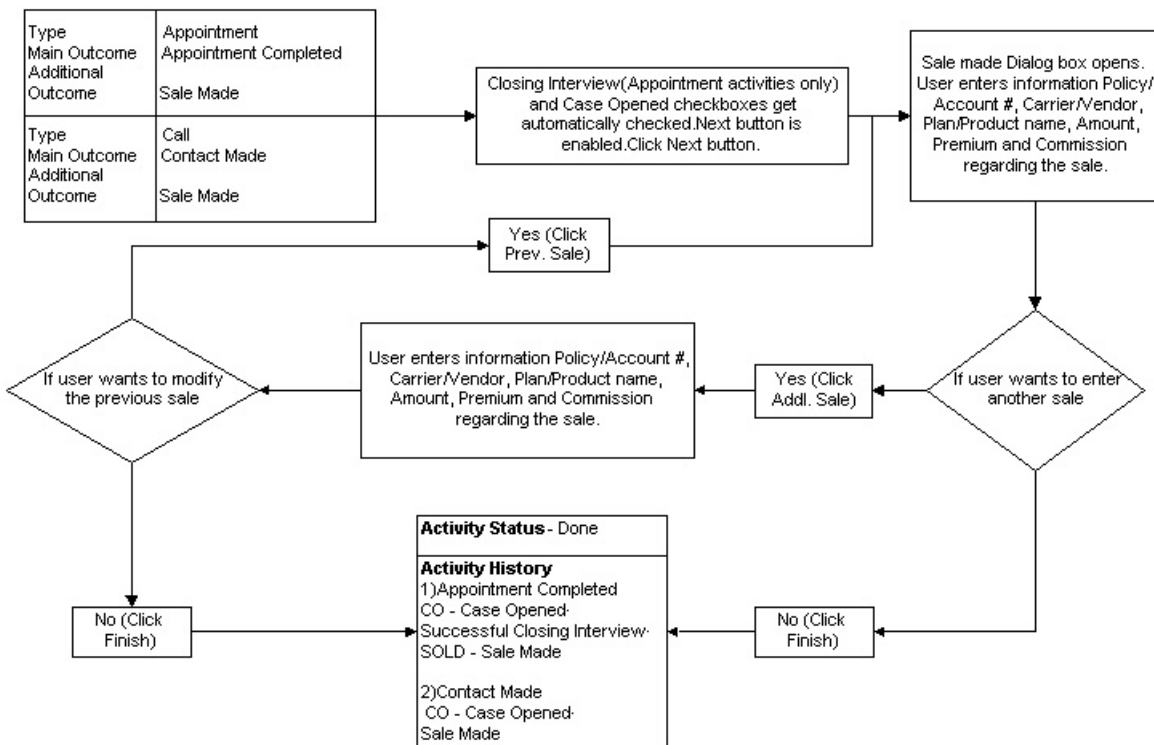


Sale Made

This outcome option is available in the following dialog boxes:

- Appointment Completed – Sale Made.
- Contact Made – Sale Made.

Workflow



Select the **Sale Made** option to automatically select the Case Opened and Closing Interview options. Click the **Next** button to open the Sale Made dialog box.

The screenshot shows a dialog box titled "Appointment Outcome Wizard" within the "SmartOffice" application. The dialog is divided into three main sections:

- Sale Made:** A header section.
- Options:** A section containing six input fields: "Policy/Account #", "Carrier/Vendor", "Plan/Product Name", "Amount", "Premium", and "Commission".
- Related Resources:** A table with three columns: "Role", "User Name", and "Percentage (%)". To the right of the table are icons for printing and a grid.

At the bottom of the dialog, there are two rows of buttons:

- Row 1: "< Prev. Sale", "Next Sale >", "Addl. Sale", "Delete".
- Row 2: "< Back", "Next >", "Finish", "Cancel".

The Sale Made dialog box has 3 sections:

- **Options:** Consists of fields for entering the Policy/Account #, Carrier/Vendor, Plan/Product name, Amount, Premium and Commission.
- **Related Resources:** Consists of information regarding the Resource Role (Potential Revenue, Resource name, etc.), User and Opportunity.
- **Buttons:** Prev. Sale, Next Sale, Addl. Sale and Delete.

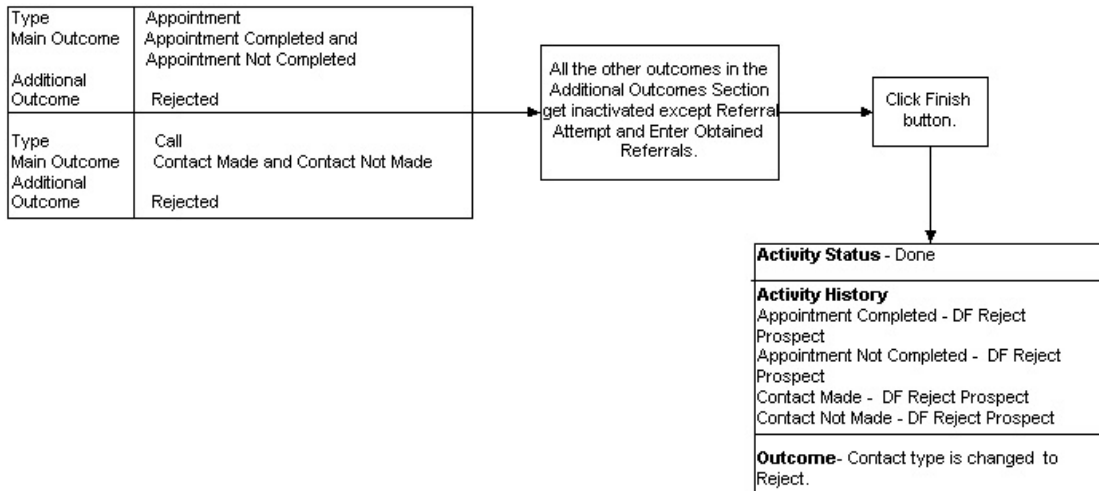
Enter all information regarding the Sale Made in the Options section. To add another sale to the current one, use the **Addl. Sale** button and update the necessary information in the Options section. View or modify the entries that have been made by selecting the **Prev. Sale** button. Click the **Finish** button after entering the necessary information to mark the activity as Done.

Rejected

This outcome option is available in the following dialog boxes:

- Appointment Completed – Rejected.
- Appointment Not Completed – Rejected.
- Contact Made – Rejected.
- Contact Not Made – Rejected.

Workflow



Enter notes regarding the rejected outcome in the Outcome Notes field and then click the **Finish** button. When this option is selected, all other outcomes in the Additional Outcomes Section are disabled except for the Referral Attempt and Enter Obtained Referrals fields.

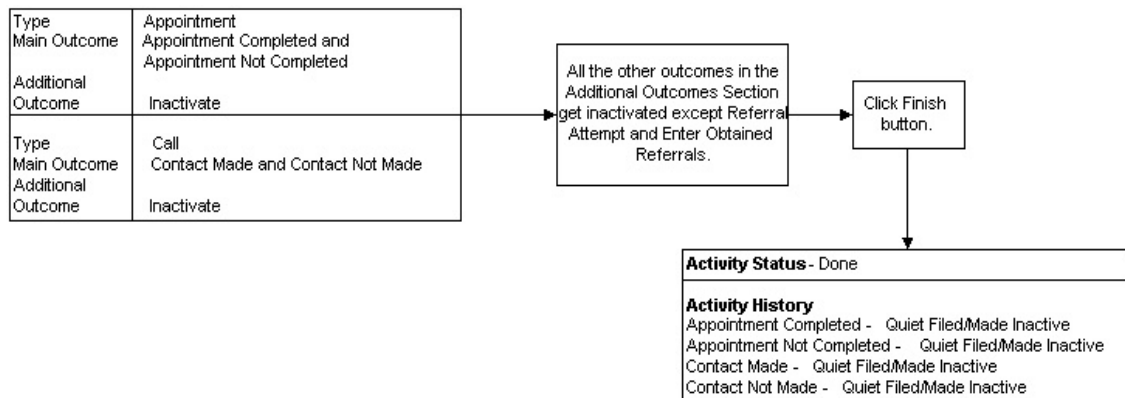
By selecting the Rejected outcome for an activity, the contact type for which the activity is scheduled is changed to Reject.

Inactivate

This outcome option is available in the following dialog boxes:

- Appointment Completed – Rejected.
- Appointment Not Completed – Rejected.
- Contact Made – Rejected.
- Contact Not Made - Rejected

Workflow



Enter notes regarding the Inactive outcome in the Outcome Notes field and then click the **Finish** button. When this option is selected, all the other outcomes in the Additional Outcomes section are inactivated except the Referral Attempt and Enter Obtained Referrals fields.

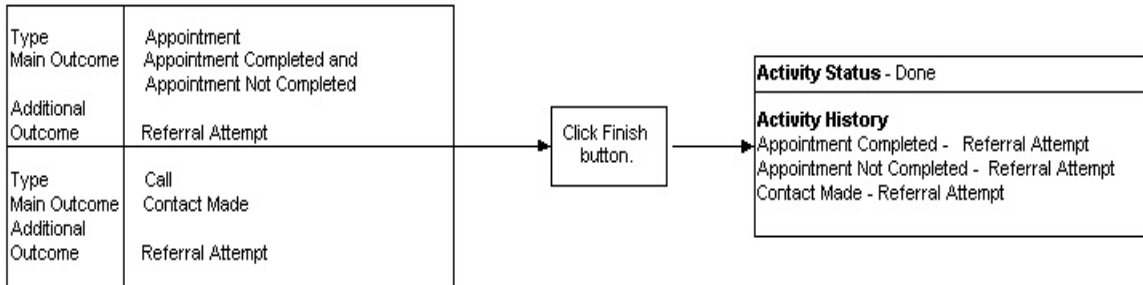
Selecting this outcome for an activity will automatically change the contact type to Inactive.

Referral Attempt

This outcome option is available in the following dialog boxes:

- Appointment Completed – Referral Attempt.
- Appointment Not Completed – Referral Attempt.
- Contact Made – Referral Attempt.

Workflow



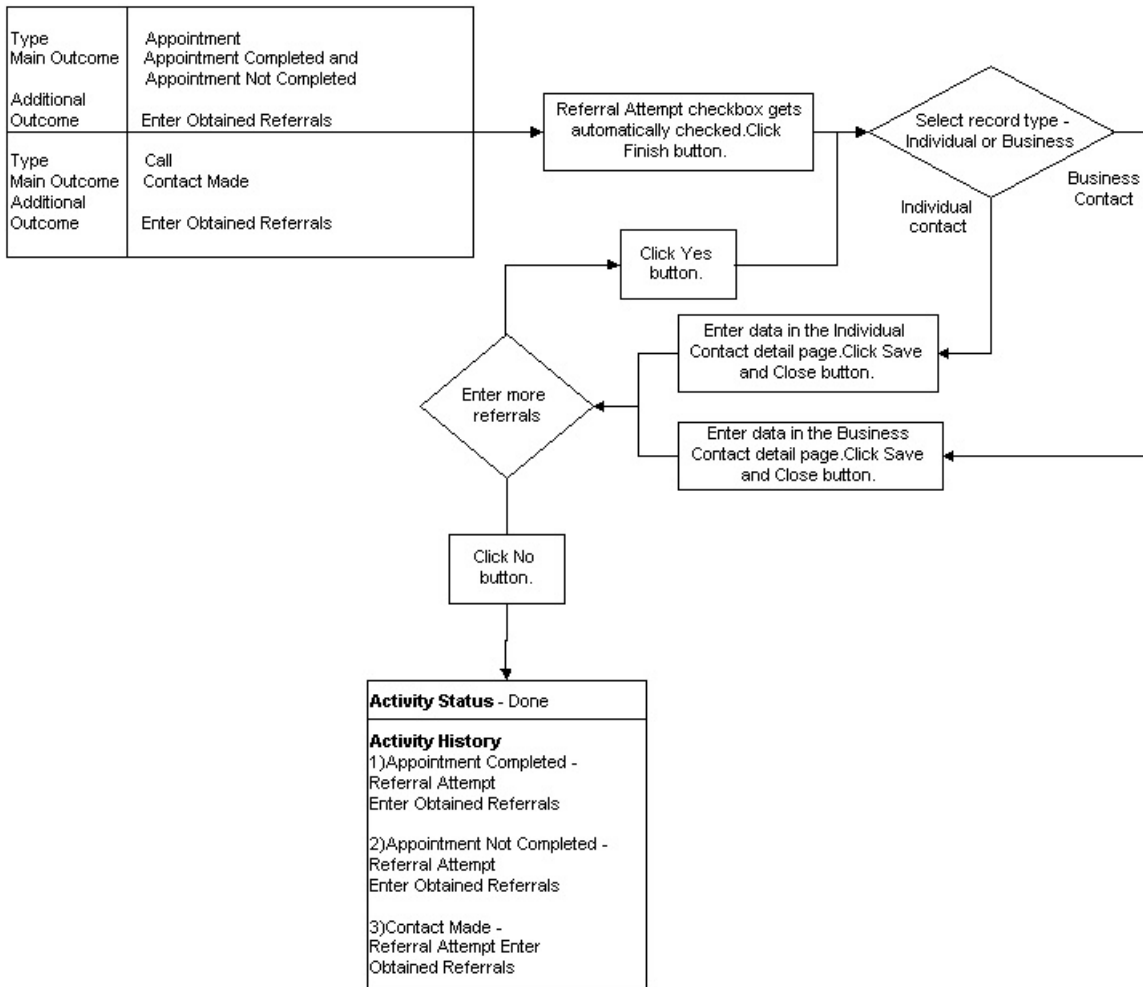
Enter notes in the Outcome Notes field regarding the Call outcome and then click the **Finish** button.

Enter Obtained Referrals

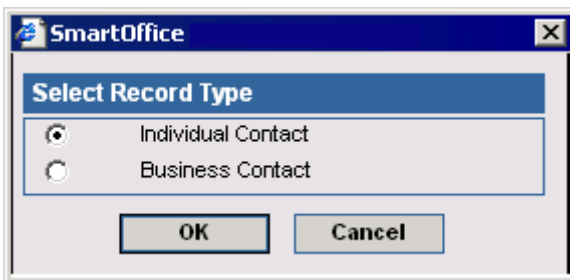
This outcome option is available in the following dialog boxes:

- Appointment Completed – Enter Obtained Referrals.
- Appointment Not Completed – Enter Obtained Referrals.
- Contact Made – Enter Obtained Referrals.

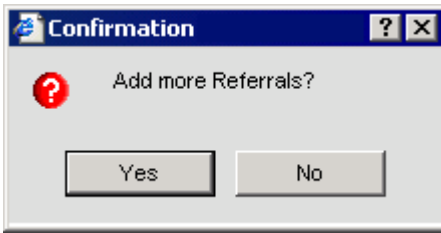
Workflow



Select this option to report that an attempt to obtain referrals was successful. When the user clicks this option, Referral Attempt is automatically selected. Click the **Finish** button to open the Select Record Type dialog box.



Select a record type and then click the **OK** button to add the details of the contact.



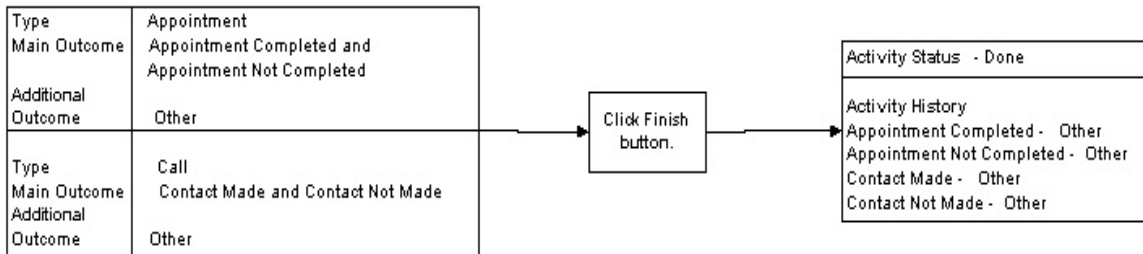
Click the **Yes** button to open the Select Record Type dialog box again to continue adding referrals; click the **No** button to end the process and record the outcome.

Other

This outcome option is available in the following dialog boxes:

- Appointment Completed – Other.
- Appointment Not Completed – Other.
- Contact Made – Other.
- Contact Not Made – Other.

Workflow

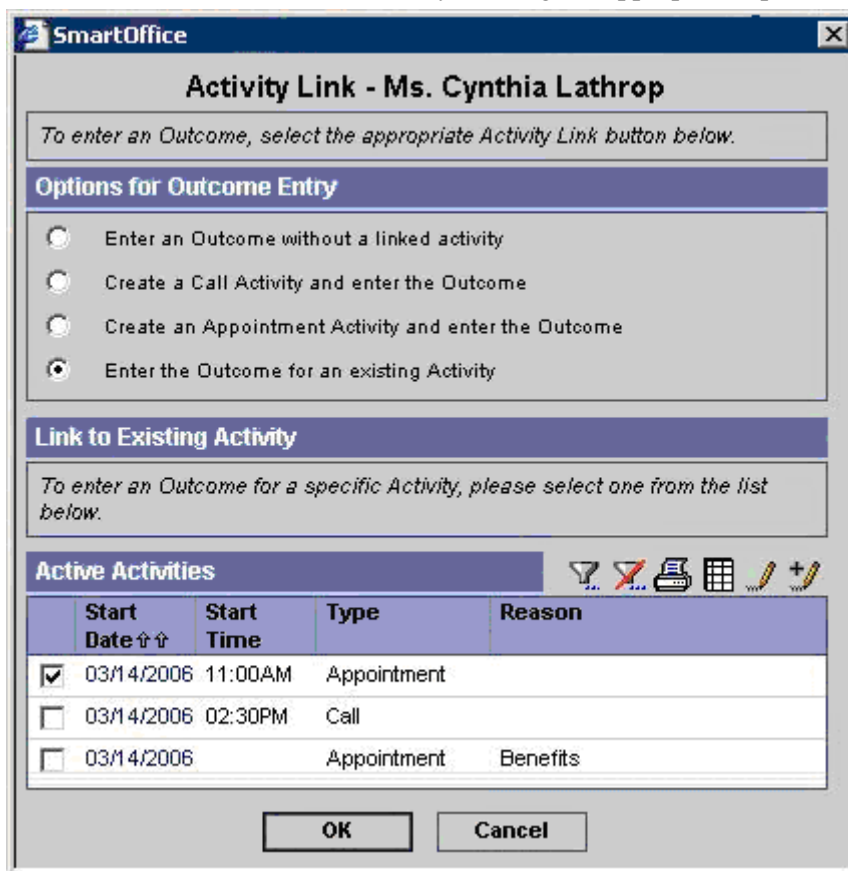


Select the **Other** option when the outcome of the call or appointment cannot be categorized in the other outcomes. Enter notes in the Outcome Notes field regarding the outcome and then click the **Finish** button.

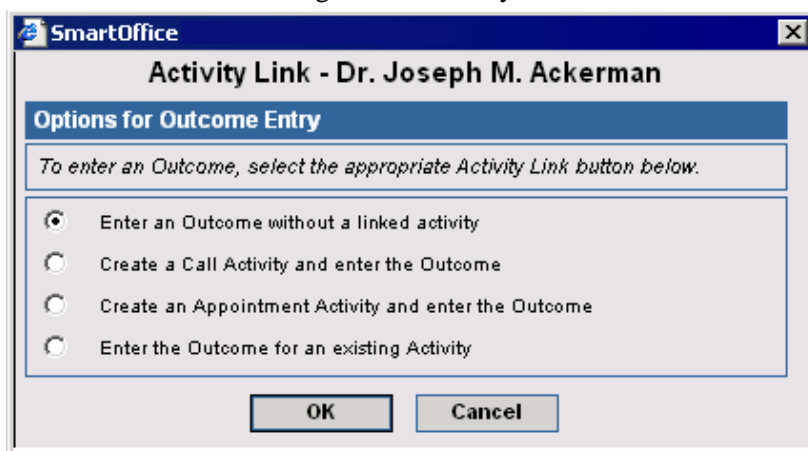
Activity Outcome Button and Activity Link Options

The Activity Outcome button is available in the main toolbar of the Contact Summary and Detail tabs. Click the button to open the Activity Link Options dialog box. The system can automatically create a Call or an Appointment activity, mark it as Done, and open the corresponding Activity Outcome Tracking Wizard, enabling the user to enter an activity and its outcome. If there are Activities pending, the user can select one from a list, have the system mark it as Done and open the Activity Outcome Tracking wizard to enter the Outcomes.

1. If there are active activities for a particular contact and the Activity Outcome button is clicked after tagging the contact, the Activity Link dialog box displays.
To enter an outcome for an existing activity on the list, select the **Enter the Outcome for an Existing Activity** option. If there is only one active activity, it will be selected automatically. If there is more than one Call or Appointment activity pending, select the required activity for which the outcome is to be entered by clicking the appropriate option.



2. Select the **Enter an Outcome without a Linked Activity** option to enable the user to enter an outcome without linking it to an activity record.



3. Upon selecting the **Create a Call Activity and Enter the Outcome** option, the system creates a call activity. It consists of two sections:
 - New Call Activity Details.
 - Activity Reason.
4. Select the Sub-type for the Activity record from the Activity Sub-type drop-down list. Enter any comments in the Activity Reason field and then click the **OK** button to open the Call Activity Outcome Wizard.

SmartOffice Activity Link - Ms. Cynthia Lathrop

To enter an Outcome, select the appropriate Activity Link button below.

Options for Outcome Entry

- Enter an Outcome without a linked activity
- Create a Call Activity and enter the Outcome
- Create an Appointment Activity and enter the Outcome
- Enter the Outcome for an existing Activity

The information entered below will appear in the Activity Detail dialog box for the Call created.

New Call Activity Details

Action Time: 03/14/2006 12:12PM

Activity Sub-Type: [Dropdown]

Subject: [Text Box]

Activity Reason: [Text Box]

Opportunity Name: Annuity [Dropdown]

OK **Cancel**

5. Select the **Create Appointment Activity and Enter Outcome** option to create an appointment activity for a user to enter an outcome.

It consists of two sections:

- New Appointment Activity Details section, which consists of Action Time, Activity Sub-type and Subject.
- Activity Reason.

Select the Sub-type for the Activity record from the Activity Sub-type drop-down list. Enter any comments in the Activity Reason field and then click the **OK** button to open the Appointment Activity Outcome Wizard.

SmartOffice

Activity Link - Ms. Cynthia Lathrop

To enter an Outcome, select the appropriate Activity Link button below.

Options for Outcome Entry

- Enter an Outcome without a linked activity
- Create a Call Activity and enter the Outcome
- Create an Appointment Activity and enter the Outcome
- Enter the Outcome for an existing Activity

The information entered below will appear in the Activity Detail dialog box for the Appointment created.

New Appointment Activity Details

Action Time: 03/14/2006 12:12PM

Activity Sub-Type: [dropdown]

Subject: [text box]

Activity Reason: [text area]

Opportunity Name: Annuity [dropdown]

OK Cancel

Outcome Wizard Dialog Box

SmartOffice

Outcome Wizard

Actual Date and Time of the Outcome

Contact: **Lathrop, Cynthia**

Start Date/Time: 03/14/2006 12:16PM

End Date/Time: 03/14/2006 12:16PM

Outcome Made Outcome Not Made

Outcomes

- Enter Scheduled Call
- Enter Scheduled Appointment
- Case Opened
- Case Closed
- Rejected
- Inactivate
- Other

Outcome Notes <H> A A↕ B I U T [Color] [Background] [List] [Link] [Print] ABC

< Back Next > Finish Cancel

The Outcome Wizard Dialog Box opens when a user selects the **Enter an Outcome without a Linked Activity** option in the Outcome Options of Activity Link dialog box.

It consists of the following sections:

- Actual Date and Time for the Outcome.
- Outcome Made and Outcome Not Made.
- Outcomes.
- Outcome Notes.

The Actual Date and Time for the Outcome section consists of the Contact Name, Date/Time and Duration. The Outcomes section has the following outcomes that are the same for both Outcome Made and Outcome Not Made.

- Enter Scheduled Call.
- Enter Scheduled Appointment.
- Case Opened.
- Case Closed.
- Rejected.
- Inactivate.
- Other.

The Enter Scheduled Call, Enter Scheduled Appointment, Case Opened, Case Closed, Rejected, Inactivate and Other outcomes are identical to the outcomes described for the Comprehensive Call Outcome and Appointment Outcome wizards.

Mass Activity Done in the To Do List

More than one call activity can be marked as Done from the To Do section of the DayView. Tag the activities to be marked as Done and then click the **Mark Activity Done** button. This opens the Simplified or Comprehensive Outcome wizard, depending on the options selected in User Preferences. The outcome options available in the case of Simplified and Comprehensive outcome wizards are listed below.

Simplified	Comprehensive
<ul style="list-style-type: none">• No Contact• Answering Machine• Reject for other Reasons• Open Comprehensive Call	<ul style="list-style-type: none">• Reschedule Call• Rejected• Inactivate• Other