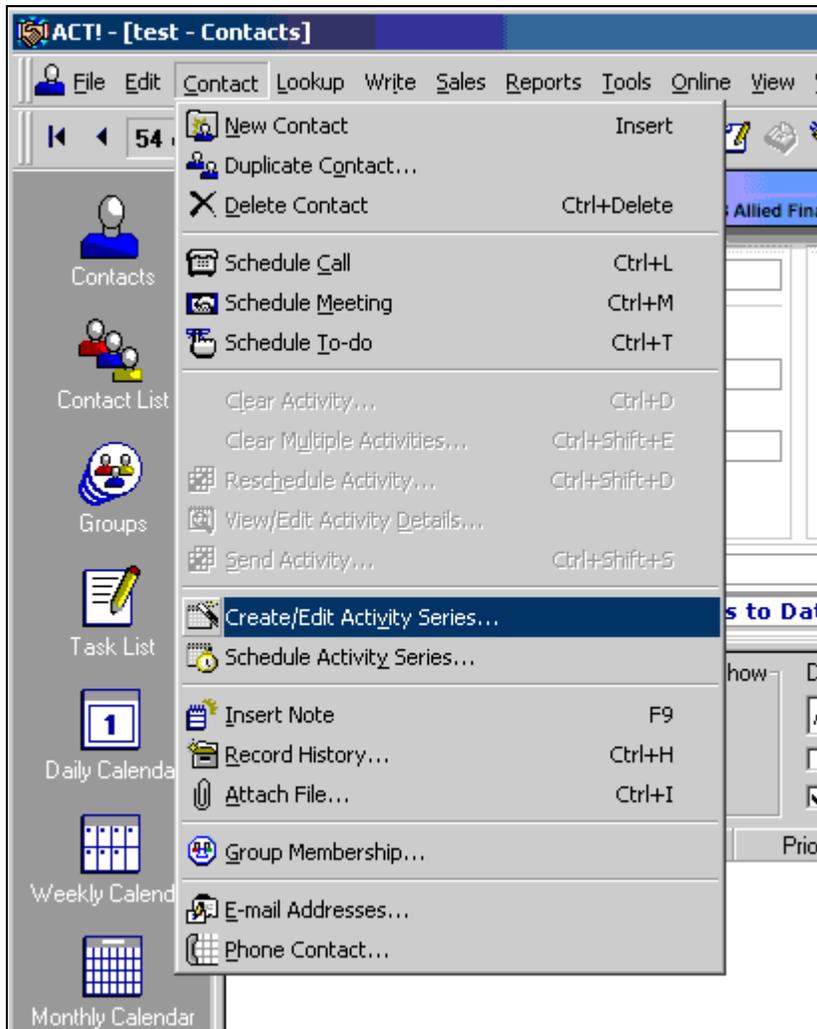
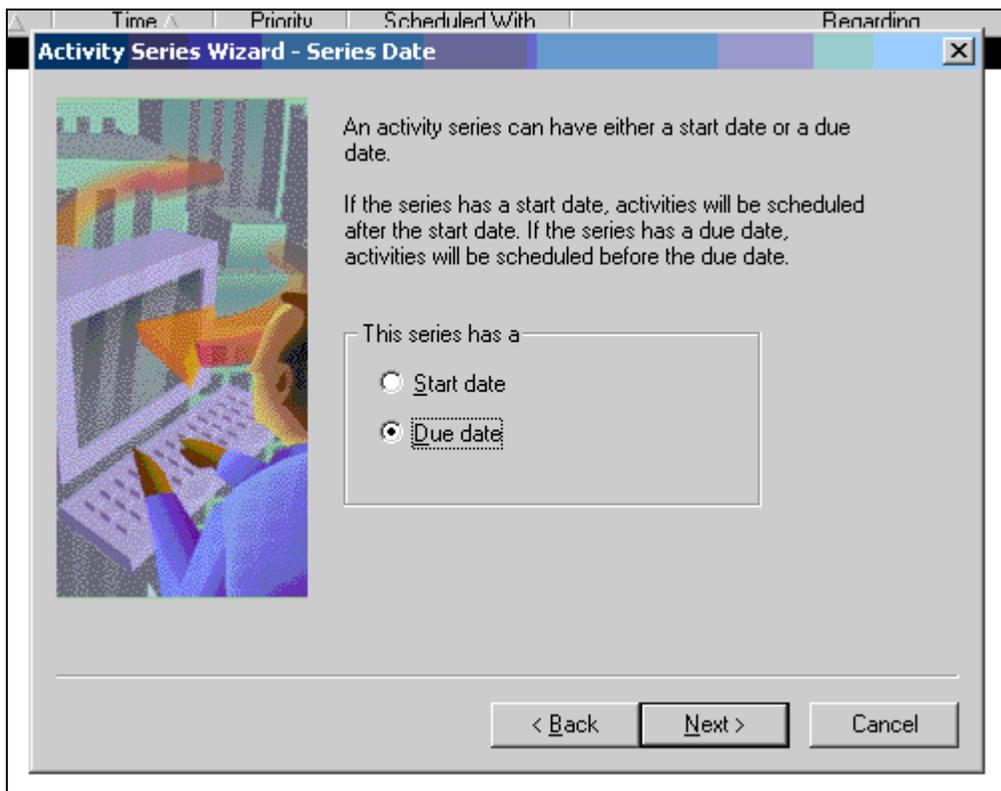
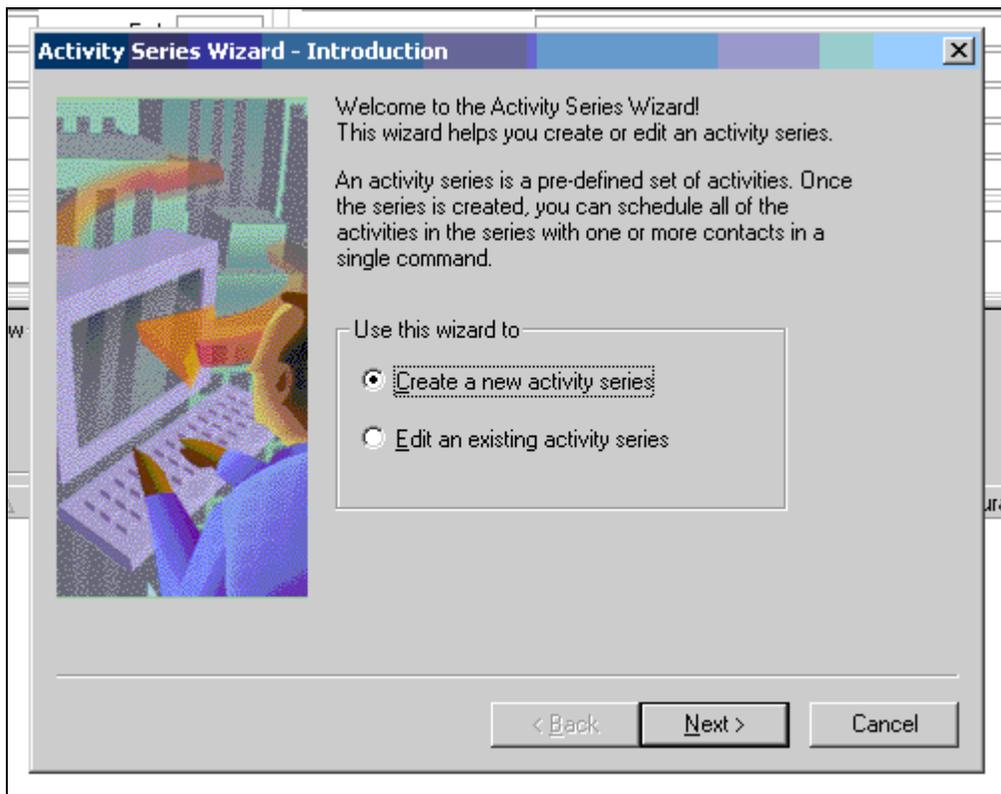


How to create an activity in Activity Series

Go to your menu in ACT! Select-- **Contact | Create/Edit Activity Series**



Carefully go through the **Activity Series Wizard**.



Here you want to enter type of activity, regarding, etc..
 In this example, we want to schedule Marla an activity 4 days before the meeting.

An activity series must have at least one activity. Specify the first activity in this series. Note: All activities will be timeless

First activity in series

Activity type	Duration	Priority
To-do	5 minutes	High

Regarding

Marla please send letter

Schedule activity

4 Day(s) BEFORE due date

Ring alarm 5 minutes before activity

If activity falls on weekend, schedule on following Monday

< Back Next > Cancel

Press Add to enter another activity to this series.

The activities in this activity series are listed below.

Click Add to add an activity to the series.
 Click Edit to edit an activity in the series.
 Click Next when you have specified all of the activities in the series.

Click Add to add an activity to the series.

Type	Before Due Date	Duration	Regarding	Priority
To-do	4 Day(s)	5 minutes	Marla please send let	High

Add...
 Edit...
 Delete

< Back Next > Cancel

Enter type of activity, regarding, etc..

In this example, we want to schedule Kathy an activity 1 day before the meeting.

Activity Series Wizard - Series

Add Activity

Activity

Activity type: Call Duration: 5 minutes Priority: High

Regarding: Kathy please call to confirm appointment for tomorrow

Schedule activity

1 Day(s) BEFORE due date

Ring alarm 5 minutes before activity

If activity falls on weekend, schedule on following Monday

OK Cancel

Repeat this step if needed to add more activities or press next

The activities in this activity series are listed below.

Click Add to add an activity to the series.
Click Edit to edit an activity in the series.
Click Next when you have specified all of the activities in the series.

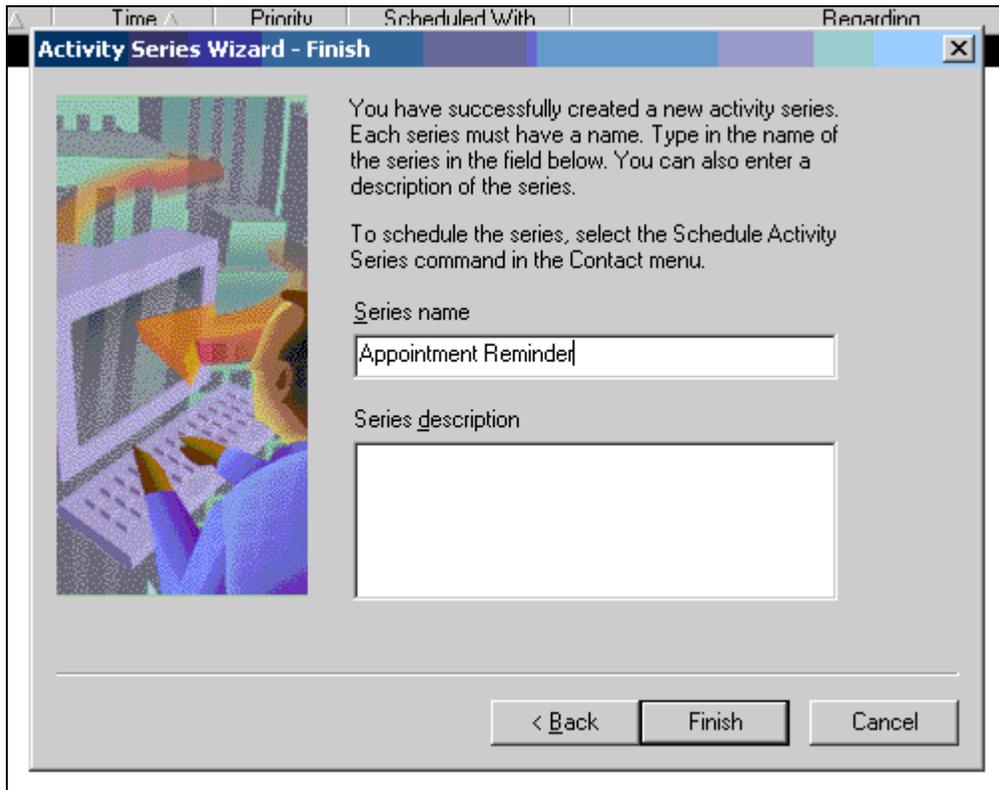
Click Add to add an activity to the series.

Type	Before Due Date	Duration	Regarding	Priority
Call	1 Day(s)	5 minutes	Kathy please call to c	High
To-do	4 Day(s)	5 minutes	Marla please send let	High

Add... Edit... Delete

< Back Next > Cancel

Enter the name of the Activity Series you are creating.



Time Print Scheduled With Renardin

Activity Series Wizard - Finish

You have successfully created a new activity series. Each series must have a name. Type in the name of the series in the field below. You can also enter a description of the series.

To schedule the series, select the Schedule Activity Series command in the Contact menu.

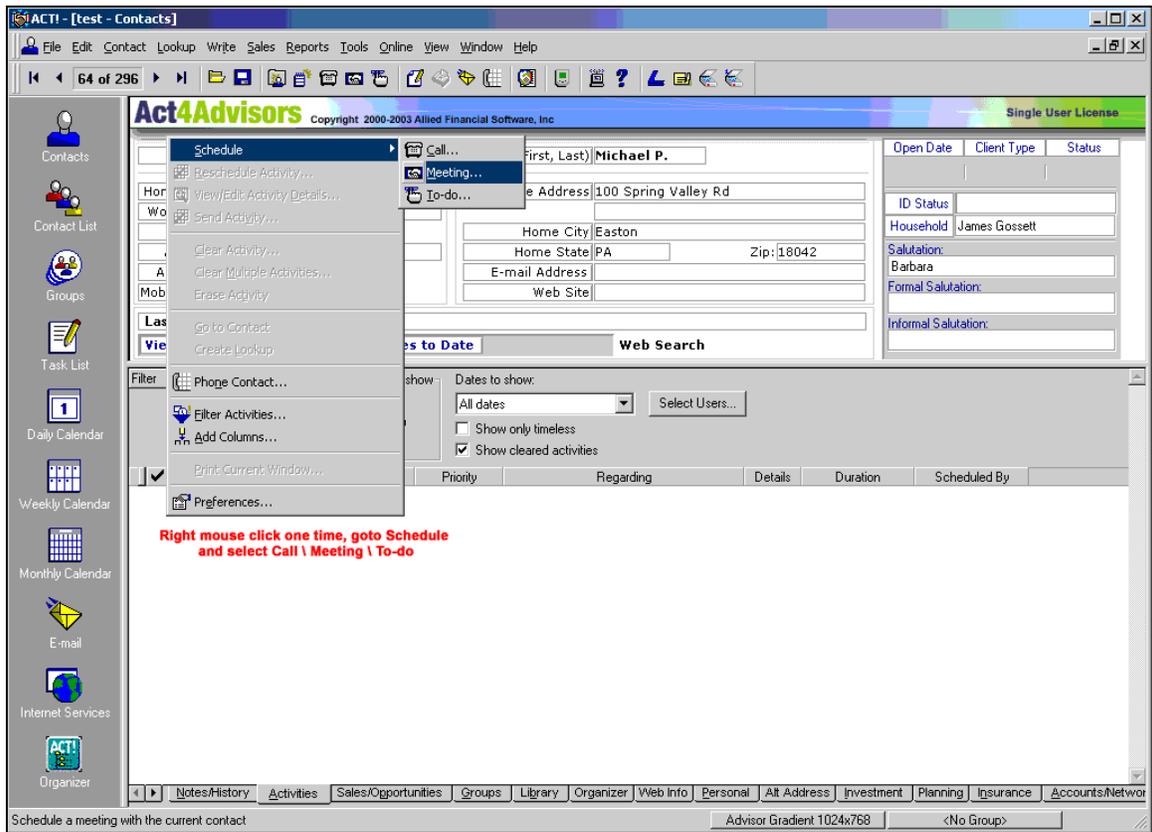
Series name
Appointment Reminder

Series description

< Back Finish Cancel

Now you are done creating, lets test it!

Select a contact to schedule a meeting with and select the Activity tab.
Anywhere in the white empty space, right mouse click one time,
goto **Schedule** and select **Call \ Meeting \ To-do**.



Create an activity.

Schedule Activity

General | Details | Recurring Settings | Advanced Options

Activity type: Meeting | Date: 4/7/2003 | Time: 2:22PM | Duration: 1 hour

With: Falcone, Barbara | Contacts

Regarding: First meeting | Priority: High

Associate with group: | Activity Color: Red

Ring alarm 5 minutes before activity

Show full day banner

Scheduled for: me | Scheduled by: me

Schedule For/By | OK | Cancel

Now add the Activity Series to this Activity

In this example, the first meeting is scheduled for 4/7/2003

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Contact: **Barbara J. Falcone** | Spouse (First, Last): **Michael P.**

Home Phone: 444-444-4442 | Home Address: 100 Spring Valley Rd

Work Phone: 444-446-4545 | Home City: Easton

Fax: 444-525-4545 | Home State: PA | Zip: 18042

Alt Phone: | E-mail Address: | Web Site:

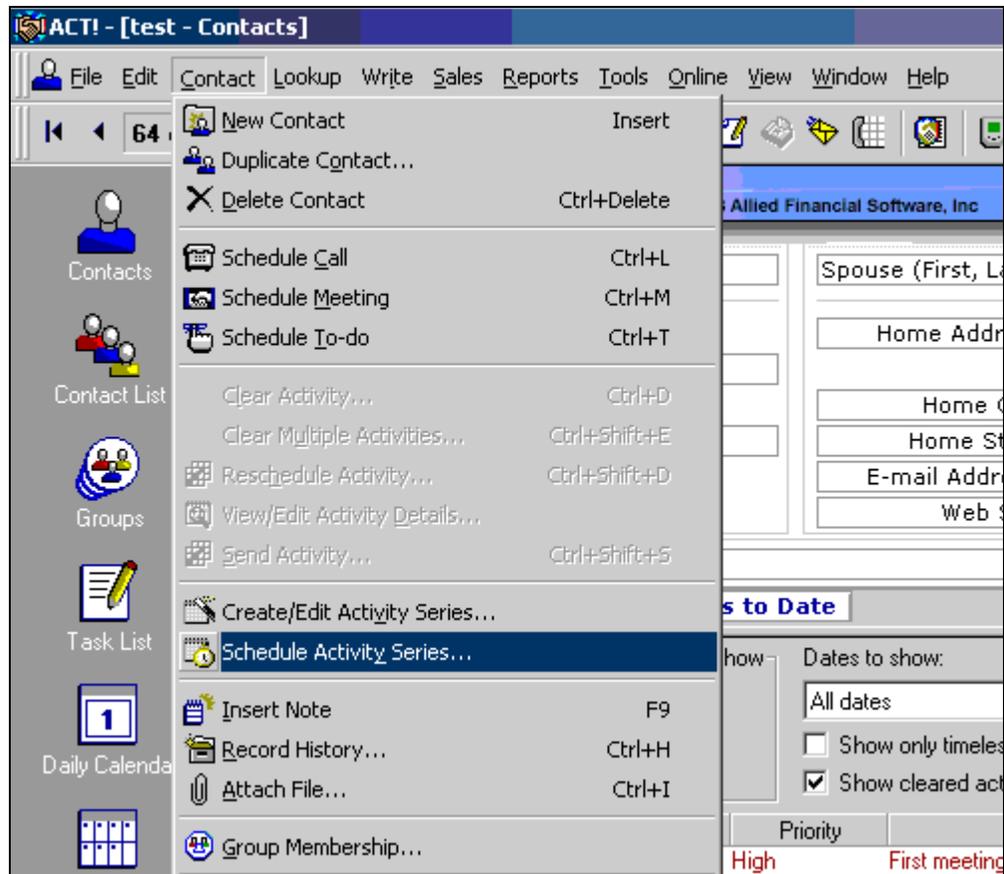
Mobile Phone: |

View Mode: Public | Comm/Fees to Date | Web Search

Filter: Types to show: Calls, Meetings, To-do's; Priorities to show: High, Medium, Low; Dates to show: All dates

Type	Date	Time	Priority	Regarding	Details	Duration	Scheduled By
Meeting	4/7/2003	2:22 PM	High	First meeting		1 hour	Wendy Deemer

Go to **Contact** and select **Schedule Activity Series**.



Select Current contact, select the activity series to apply, and enter the date of the meeting and press schedule.

Ext. <input type="text"/>	Home Address	100 Spring Valley Rd	
<input type="text"/>	Home City	Easton	
<input type="text"/>	Home State	PA	Zip: 18042

Schedule Activity Series [X]

Schedule activity series with

All contacts

Current contact

Current lookup

Series due date

▼

Select activity series

Appointment Reminder

Series description

Notice the dates below. We first scheduled a meeting for 04/07/2003, and then we added the activity series, which added to more activities.

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Contact: **Jean V Fazio**

Home Address: 1503 Ridge Road
Home City: Belmont
Home State: CA Zip: 94002

Last Results
View Mode: Public | Comm/Fees to Date | Web Search

Filter: Types to show: Calls, Meetings, To-do's; Priorities to show: High, Medium, Low; Dates to show: All dates

Type	Date	Time	Priority	Regarding	Duration	Scheduled By
	4/3/2003	NONE	High	Marla please send letter	5 minutes	Wendy Deemer
	4/6/2003	NONE	High	Kathy please call to confirm appointment for t	5 minutes	Wendy Deemer
	4/7/2003	2:30 PM	High	Breakfast meeting	1 hour	Wendy Deemer

Note: You can only schedule activities for one person. That is why I put the persons in charge of a certain activity in the “Regarding”. Make sure the filter is set for all users. Press the Task List button on the left side and sort by date like the example below or --

ACT! - [test - Task List]

File Edit Contact Lookup Write Reports Tools Online View Window Help

Filter: Types to show: Calls, Meetings, To-do's; Priorities to show: High, Medium, Low; Dates to show: All dates

Type	Date	Time	Priority	Scheduled With	Regarding
	4/3/2003	NONE	High	Jean V Fazio	Marla please send letter
	4/6/2003	NONE	High	Jean V Fazio	Kathy please call to confirm appointme
	4/7/2003	2:22 PM	High	Barbara J. Falcone	First meeting
	4/28/2003	NONE	High	Gary L Fillinger	Marla please send letter
	4/29/2003	NONE	High	Gary L Fillinger	Kathy please call to confirm appointme
	4/30/2003	3:47 PM	High	Gary L Fillinger	Contract negotiations

sort by pressing “Regarding”.

✓	Type	Date	Time	Priority	Scheduled With	Regarding
		4/3/2003	NONE	High	Jean V Fazio	Marla please send letter
		4/28/2003	NONE	High	Gary L Fillinger	Marla please send letter
		4/29/2003	NONE	High	Gary L Fillinger	Kathy please call to confirm appointme
		4/6/2003	NONE	High	Jean V Fazio	Kathy please call to confirm appointme
		4/7/2003	2:22 PM	High	Barbara J. Falcone	First meeting
		4/30/2003	3:47 PM	High	Gary L Fillinger	Contract negotiations

Keep in mind you can always go back and change the user for a particular activity.

Hope this helps!