## How to create an activity in Activity Series

👹 ACT! - [test	- Contacts]	
🔒 Eile Edit	<u>Contact</u> Lookup Write <u>Sales</u> Reports I	ools <u>O</u> nline <u>V</u> iew <u>V</u>
◀ ◀ 54	New Contact	Insert 🛛 🏹 🍪 🂐
	<sup>24</sup> Ω Duplicate C <u>o</u> ntact	
2		Delete Allied Final
Contacts	🛅 Schedule ⊆all	Ctrl+L
0	Schedule Meeting	Ctrl+M
- <u>*</u>	😇 Schedule <u>T</u> o-do	Ctrl+T
Contact List	Clear Activity	Ctrl+D
	Clear Myltiple Activities Ctrl+3	ihift+E
<b>E</b>	Reschedule Activity Ctrl+S	ihift+D
Groups	Wiew/Edit Activity Details	
=/	🕮 Send Activity Ctrl+3	hift+S
	🖄 Create/Edit Acti <u>v</u> ity Series	s to Dat
Task List	Schedule Activity Series	how D
	💣 Insert Note	F9 A
Dailu Calenda	🖀 Record History	Ctrl+H
	🗍 Attach File	Ctrl+I
• • • •	😬 Group Membership	Priori
Weekly Calend	🔊 E-mail Addresses	
	🚺 Phone Contact	
Monthly Calenda	ar	

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

Carefully go through the Activity Series Wizard.



∆ I Time ∧ I	Prinritu	Scheduled With		Recardir	hα ,
Activity Series Wi	zard - Se	eries Date			×
		An activity series can have date. If the series has a start dat after the start date. If the s activities will be scheduled This series has a <u>• Start date</u> • Due date	e either a start date or e, activities will be sch eries has a due date, before the due date.	a due neduled	
		< <u>B</u> ack	< <u>N</u> ext>	Cano	el

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.

Activity Series Wizard - First Activity         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         Begarding         Marla please send letter         Schedule activity         Schedule activity         Pay(s)       BEFORE due date         Ring alarm       5 minutes         If activity falls on weekend, schedule on following Monday	△ I Time ∧ I Prioritu	Scheduled With	Benarding ,
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 S minutes High Regarding Marla please send letter Schedule activity	Activity Series Wizard - Fi	rst Activity	×
		An activity series must have at least or first activity in this series. Note: All activity First activity in series Activity type Duration To-do <ul> <li>Duration</li> <li>To-do</li> <li>5 minutes</li> </ul> <li>Begarding</li> <li>Marla please send letter</li> Schedule activity <ul> <li>Schedule activity</li> <li>Day(s)</li> <li>Ring alarm 5 minutes</li> <li>If activity falls on weekend, schedule</li> </ul>	ne activity. Specify the vities will be timeless Priority High BEFORE due date before activity edule on following Monday
< <u>B</u> ack <u>N</u> ext > Cancel		< <u>B</u> ack 1	Next > Cancel

Press Add to enter another activity to this series.

<u>∧</u> _L Time ∧	Prinritu	Scheduled	With		Benarding ,
Activity Serie	s Wizard - Serie	5			×
Click Add to	o add an activity to	The act Click Ad Click Ed Click Ne activities	ivities in this activ d to add an activi it to edit an activit xt when you have s in the series.	ity series are liste ty to the series. y in the series. specified all of	ed below. the
Туре	Before Due Date	Duration	Regarding	Priorit 🔺	
To-do	4 Day(s)	5 minutes	Marla please ser	d let High ▼	<u>Add</u>
			< <u>B</u> ack	<u>N</u> ext >	Cancel

Enter type of activity, regarding, etc.. In this example, we want to schedule Kathy an activity 1 day before the meeting.

∆_L Time	A Priority Scheduled With	Benarding L
Activity Se	eries Wizard - Series	×
A	dd Activity	×
	Activity <u>Activity type Duration Priority</u> Call  Sminutes High <u>Begarding</u>	
Click	Kathy please call to confirm appointment for tomorrow	
Type To-do	-Schedule activity	
	Day(s) EFORE due date	
	<b>Ring alarm</b> 5 minutes <b>before activity</b>	
•	☑ If activity falls on weekend, <u>s</u> chedule on following Monday	
		Cancel

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

🛓 🗌 Time 🛆	Prinritu	<ul> <li>Scheduled</li> </ul>	With				Bena	rdina ,
Activity Serie	s Wizard - Serie	15						×
		The act Click Ad Click Ed Click Ne activities	ivities in Id to add it to edit ext when s in the s	this activ an activi an activit you have eries.	ity ser ty to t y in th spec	ies are lis he series ne series, cified all c	ited belov of the	ν.
Click Add to	o add an activity to	) the series.						
Туре	Before Due Date	Duration	Regard	ing		Prioriț 🔺		
Call	1 Day(s)	5 minutes	Kathy p	lease call	l to c	High 📃		d 1
To-do	4 Day(s)	5 minutes	Marla p	lease sen	id let	High	<u></u>	
						-		fit
							<u> </u>	aete
			< <u>B</u>	ack	N	ext >	Ca	incel

Enter the name of the Activity Series you are creating.

$\triangle$ Time $\triangle$	Prioritu	Scheduled With	Begarding ,
Activity Series W	/izard - Fin	ish	×
		You have successfully created a new Each series must have a name. Type the series in the field below. You can a description of the series. To schedule the series, select the Sch Series command in the Contact menu. Series name Appointment Reminder Series description	activity series. in the name of also enter a nedule Activity
		< <u>B</u> ack Fi	nish 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	X
General Details Recurring Settings Advanced Options	
Activity type: Date: Time:	Duration:
Meeting • 4/7/2003 • 2:22PM	▼ 1 hour ▼
<u>W</u> ith:	
/- Falcone, Barbara	<u> <u> </u> </u>
<u>R</u> egarding:	Priority:
First meeting	▼ High ▼
Associate with group:	Activity Color:
- I.I.	
Ring alarm 5 minutes defore activity	
☐ Sh <u>o</u> w full day banner	
Scheduled for: Scheduled b	oy:
me 💌 me	<b>•</b>
<u>S</u> chedule 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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Q	Act4Advisors	Copyright 2000-2003 Allied	f Financial Software, Inc				Singl
Contacts	Contact Barbara J. Fa	lcone	Spouse (First, Last)	Michael P.			)pen Date Client Type
<b>4</b> 00	Home Phone 444-444-4442	]	Home Address	100 Spring Valley Rd			ID Status
Contact List	Fax 444-525-4545	Ext.	Home City	Easton			ousehold James Gosset
<u>æ</u>	Alt Phone Alt Phone2		E-mail Address	PA	Zip: 1804	42 B	alutation: arbara
Groups	Mobile Phone	]	Web Site			Fo	ormal Salutation:
=/	Last Results	Comm/Eees to I	Date	Web Search		In	formal Salutation:
Task List	Filter V Types to show-	Priorities to show	Dates to show:	inco scarcii			
	Calls	✓ High	All dates	Select Users			
Daily Calendar	I Meetings I To-do's	Low	Show only timeless Show cleared activitie	5			
	✓ Type Date △	Time A	Priority	Regarding	Details	Duration	Scheduled By
/eekly Calendar	4/7/2003	2:22 PM High	First meeting			i nour	Wendy Deemer
onthly Calendar							
*							

Go to Contact and select Schedule Activity Series.

👹 ACT! - [test	- Contacts]		
🔒 Eile Edit	<u>Contact</u> Lookup Write <u>S</u> ales	<u>R</u> eports <u>T</u> ools <u>O</u> nline	e <u>V</u> iew <u>W</u> indow <u>H</u> elp
I I I 64	🗽 New Contact	Insert	7 🐵 🏷 🖽 🚳 🗉
	Ag Duplicate Contact		
Q	X Delete Contact	Ctrl+Delete	Allied Financial Software, Inc
	🖆 Schedule <u>C</u> all	Ctrl+L	Spouse /First L
Contacts	Schedule Meeting	Ctrl+M	
<b>4</b> 00	🐮 Schedule <u>T</u> o-do	Ctrl+T	Home Addr
Contact List	Clear Activity	Ctrl+D	Home
	Clear Multiple Activities	Ctrl+Shift+E	Home St
<b>1</b>	🗱 Reschedule Activity	Ctrl+Shift+D	E-mail Addr
Groups	👜 View/Edit Activity Details		Web S
	🕮 Send Activity	Ctrl+Shift+S	
<b>1</b>	🖄 Create/Edit Acti <u>v</u> ity Series		s to Date
Task List	Schedule Activity Series		how- Dates to show:
	📫 Insert Note	F9	All dates
Deilu Celende	🗧 Record History	Ctrl+H	Show only timeles
Daily Calenda	🕼 Attach File	Ctrl+I	Show cleared act
• • • •	🔁 Group Membership		Priority High First meeting

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

2		Home A	Address	100 Spring	Valley Rd		
5	Ext.						
5		Hor	me City	Easton			
		Hom	e State	PA		Zip: 18042	
S	chedule Activity Serie	25			,	)	×I
	-Schedule activity series	s with	- Select a	ac <u>t</u> ivity series—			
-	C <u>A</u> ll contacts		Appoin	tment Reminde	er	Delete Se <u>r</u> ies	
- V	Current contact						F
	C Current Jookup						
	S <u>e</u> ries due date		Series <u>c</u>	escription			
	4/7/2003	•				4	ra
					Schedule	Cancel	

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.

Act4Advisors	Copyright 2000-2003 Al	lied Financial Se	oftware, Inc			
Contact Jean V Fazzi	D	Spou	se (First, Last)			Open Date Clien
Home Phone Work Phone	Ext.		Home Address 1503 Ridg	e Road		ID Status Household James G
Alt Phone			Home State CA		Zip: 94002	Salutation:
Mobile Phone	]		Web Site			Formal Salutation:
Last Results						Informal Salutation:
View Mode Public	Comm/Fees t	to Date	Web 9	Bearch		
Filter ✓ Types to show- ✓ Calls ✓ Meetings ✓ To-do's	Priorities to sho F High High Low	w Dates to All date Show	show: s  volly timeless volleared activities	Select Users		
Type Date ∆	Time 🛆	Priority	Regarding		Details Du	ration Scheduled B
<ul> <li>4/3/2003</li> <li>4/6/2003</li> <li>4/7/2003</li> <li>4/7/2003</li> </ul>	NONE H NONE H 2:30 PM H	igh igh igh	Marla please send letter Kathy please call to confirm a Breakfast meeting	ppointment for to	5 minute: 5 minute: 1 hour	Wendy Deemer Wendy Deemer 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]							
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0	Filter	V	- Types to show -	Priorities to s	how-	Dates to show:		
<u> </u>			🔽 Calls	💌 High		All dates	•	Select Users
Contacts			Meetings	🔽 Medium		Show only timele		
			🔽 To-do's	🔽 Low		Show cleared ac	tivities	
<u> </u>	l na i	T	D-1-	Tine 6			15.701	D
	<b></b>	lype 1%	Uate ∆		- Pfi Lliab	lonity Scheduled	i with	Regarding
Contact List			47372003	NONE	nign Lital	Jean V Fazzio	Mana Kata	i please serio letter - electe cell la confirmación de cintera
		<i></i>	4/6/2003	NUNE	High	Jean V Fazzio	Nathy Till I	please call to confirm appointme
A 19 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1			4/7/2003	2:22 PM	High	Barbara J. Fak	cone First i	meeting
<u> </u>		10	4/28/2003	NONE	High	Gary L Fillinger	r Marla	a please send letter
Groups		<b>@</b>	4/29/2003	NONE	High	Gary L Fillinger	r Kathj	please call to confirm appointme
(Internet internet in			4/30/2003	3:47 PM	High	Gary L Fillinger	r Contr	act negotiations
1 Daily Calendar								

sort by pressing "Regarding".

Contract Teach Teach 1940											
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•	Filter		- Types to show -	Priorities to	show	Date	s to show:				
			Calls Meetings	🔽 High		All d	lates	•	Select Users		
Contacts				Medium			how only timeless				
0.			💌 To-do's	✓ Low		🔽 S	how cleared activities				
<b>~</b>		Туре	Date	Time	Pri	ority	Scheduled With		Regarding		
Contact List		16	4/3/2003	NONE	High		Jean V Fazzio	Marla	please send letter		
		×.	4/28/2003	NONE	High		Gary L Fillinger	Marla	please send letter		
		- 8	4/29/2003	NONE	High		Gary L Fillinger	Kathy	please call to confirm appointme		
<b>E</b>		8	4/6/2003	NONE	High		Jean V Fazzio	Kathy	please call to confirm appointme		
Groups		i.	4/7/2003	2:22 PM	High		Barbara J. Falcone	First m	neeting		
			4/30/2003	3:47 PM	High		Gary L Fillinger	Contra	act negotiations		
		_			_				-		
T and a line											
T ASK LIST											
Daily Calendar											

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

Hope this helps!