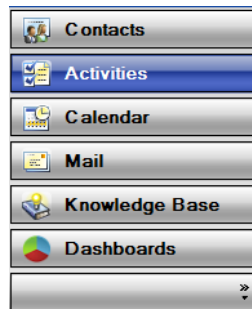


## How to: Use the Rollover Function

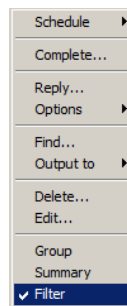
Let's face it; you're going to have to take some unexpected time off work. Whether it be sick days, unexpected news, family emergencies, or an impromptu vacation, you are going to miss days of work. The rollover tool makes it easy to move your scheduled events en masse which makes for much better organization during these times off. The rollover function allows you to push scheduled events to another user, or simply move them to another date.

**Step 1:** Open the activities tab by selecting *Activities* on your Navigation Pane (the window down the left side of your GoldMine)



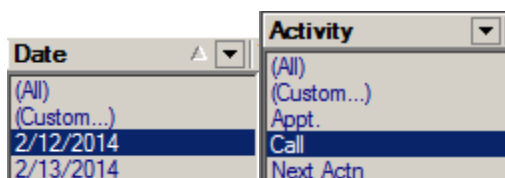
**Step 2:** Understand the Rollover Function

In order to use the rollover function, you must get ONLY the events you want rolled-over to display in the activities window. In order to do so, right click in the window and select filter.



Selecting filter will bring down dropdown menus for each column from which you can filter by any data in that column.

**Example:** if you are rolling over all your calls (but nothing else) from a particular date, click the date dropdown and select the appropriate date. Then click the activity dropdown and select call. This will only display calls on a the date selected

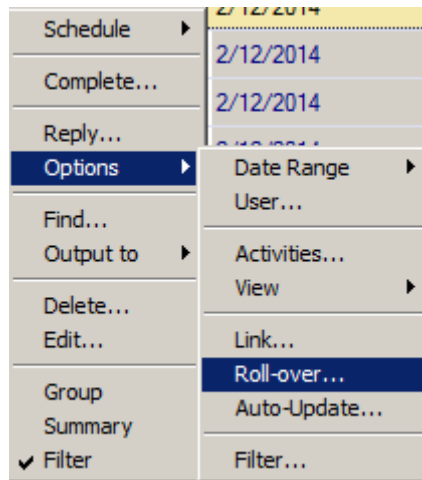


This can be used in extensive combination, ie, all CALLS coded as SALES(sls) on Feb 12, 2014

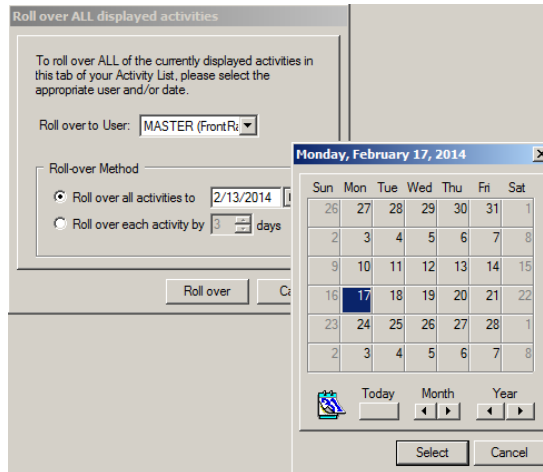
In this case, we want all events from Feb 13, 2014

Activity	Code	Date	Time	Contact	Reference	User
Call	SLS	2/13/2014	10:00 am	Fictional Hudgin	Call Re: GoldMine	MASTER (FrontRange ...
Appt.		2/13/2014	10:30 am	John Branch	Review Meeting	MASTER (FrontRange ...
Call	SLS	2/13/2014	11:00 am	Charles Detail	Call Re: wMobile	MASTER (FrontRange ...
Next Actn		2/13/2014	12:00 pm	Superman	Save The World	MASTER (FrontRange ...
Call	SVC	2/13/2014	1:00 pm	Manny Singh	Discuss Broken GM	MASTER (FrontRange ...
Appt.		2/13/2014	1:00 pm	Gabe Capman	Demo walk through	MASTER (FrontRange ...
Call		2/13/2014	1:30 pm	Homer Stellchild	Discuss potential for CR...	MASTER (FrontRange ...
Call		2/13/2014	2:00 pm	Lyle Smith	Close Deal	MASTER (FrontRange ...

Step 4: Right click in the window, hover over options, and select *Roll-Over*

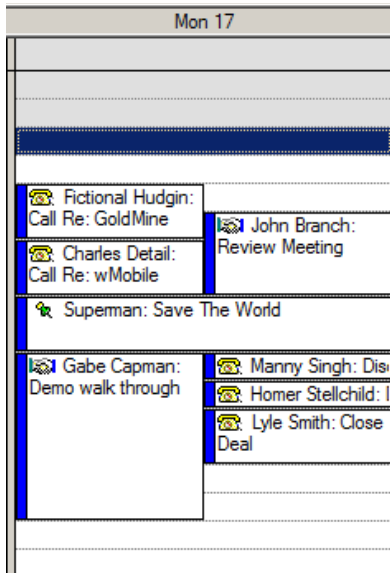


Step 5: The following options will be displayed; here you can select to roll them over to a new user, a particular date, or push the activities out a certain number of days. In this case we want them rolled over to the 17<sup>th</sup>.



**Step 6:** Click select, if you are happy with your selections and target date, user etc. select roll over.

**NOTE: THERE IS NO UNDO, ALL THE ACTIVITIES IN THE WINDOW WILL BE ROLLED OVER AND THERE IS NO WAY TO BRING ONLY THE ROLLED-OVER ACTIVITIES BACK**



As you can see, the events are now in my calendar for Monday Feb 17. Looks like a busy lunch hour.