MARKETING CALENDAR OFFICE NEW APPROVAL PROCESS

The feature, to assign approvals for a Task, such as approval for a graphic design, copy etc., has several capabilities to make the process easier, more efficient, automated and better tracking. While you can still view the approval list by selecting Approvals under Manage My Office, the new process automatically informs the person assigned the Task, when the Approver has approved the particular Task via an email and also notes it on the Task editor window who has approved and who has not if more than one person. You can also, select more than one person now for an approval and those selected do not have to be MCO users but can be anyone from your contact list in MCO. The other features include, a variety of timeframes you can send reminders for approval and you can select the start date for reminders for approvals.

1. When adding a Task and assigning to whom you need an approval from simply select from the second contact/mail box as shown below:

2. Next select how often you want approval email reminders sent (this pull down menu has a default of No Approval) and the start day for these reminders. The start date is just to the right of the pull down menu for the timeframe choices:

3. Once you save the Task, an email notification concerning the approval is automatically sent to the one(s) selected for Approval. The email will contain a live link for the approver to click on and the link will take them to a secure screen to view the file that needs their approval:

From: no-reply@mymarketingcalendaroffice.com
Subject: **Marketing Calendar Online Approval Notice**
Date: May 10, 2012 12:00:30 AM EDT
To: Fran Anderson
Cc: Fran Anderson , Lesley Jones , Fran Anderson , Fran Anderson , Fran Anderson

This is a reminder e-mail sent from Marketing Calendar Office. Account: CLAS A Marketing and Branding
You are required to approve the following Task:
Graphic Design for Web Ad
from Project: On line Ads for Face Book & AMA Resource Dir
Please follow this link (or copy and paste it into your browser's address bar) to approve or deny this item
http://mymarketingcalendaroffice.com/MCO_LIVE/web/Modules/Tasks/approvalManager.cfm?
UKey=34E79554-3048-D4D9-320F2D6334AD7FA1

On the secure Approval window, click on the Edit icon to the left of the :

You are in Temp Access MODE. Login

Update Approvals X

View
⊙ My Approvals

Actions	Task/Press Release	Approval From	Category	Due Date	Last Updated	Approval
	Dis App Copy for Brochure	Art Department		03/22/12	04/02/12	⊙ Approved ○ Denied ○ No Action
	Test Approval 4/4/12 Art Dept	Art Department		04/04/12	04/04/12	⊙ Approved ○ Denied ○ No Action
	Graphic Design for Web Ad	Art Department	web	04/23/12	05/11/12	○ Approved ○ Denied ⊙ No Action

This will open the Task editor window, then select the attached file to be opened or it may download, depending on your system, review the file and select save on the Task window. Then the Approver will select Approved or Denied as shown in the screen shot above, then select Update Approvals in the upper right hand corner.

4. Once the Approver selects Update Approvals, an email notification is sent to the individual that was assigned the Task. On the last approval the email will state that all have approved. It will also show on the Task Editor Window for that Task:

From: no-reply@mymarketingcalendaroffice.com
Subject: **A MyMarketingCalendarOffice Task has received an approval from Fran Anderson**
Date: May 10, 2012 1:54:27 PM EDT
To: Fran Anderson

Fran Anderson <fanderson@clasamarketingandbranding.com>
        The following item has received an approval:
Task: BR Sports Brochure Graphic Design
as part of Campaign: Bodies Rebuilt Sports Therapy
Project: Sports Therapy Brochure
that starts 2012-04-10 00:00:00.0 and ends 2012-04-30 00:00:00.0
This task has been APPROVED by Fran Anderson<fanderson@clasamarketingandbranding.com>
--- Approval status ---

For Tasks previously created prior to the new method and an approval from name was selected, the editor window will still be the same with the exception of the selection field added for additional approvers. Below is a screen shot of a previous created Task with an Approver and shows the CC. All new Task Editor windows appear as the ones shown above.

Task	BR Sports Brochure Graphic Des
Category	None Change Project/Event Clear Project/Event: ☐
Reminder	No Reminder Start: 04/06/20

(Start typing to filter contacts)

CC:
☐ Send Email

☐ Lesley Jones ☐ Pamela Anderson
☐ Carrie Anderson ☐ Fran Anderson
☐ Intuit Anderson ☐ Jeremy Jones ☐ Laura Jack
☐ Marie Callendar ☐ Paul Dean ☐ Paul Gubbins

Account # [ ]

Job # [ ]

Date 4/10/2012 to 4/30/2012

Assigned To Fran Anderson

Approval from CC: Weekly   Start: 4/16/201

Fran Anderson

(Start typing to filter contacts)

☐ Art Department ☐ Franpa Anderson
☐ Lesley Jones ☐ Pamela Anderson
☐ Carrie Anderson ☐ Fran Anderson

Expense 350.00

Budget   Actual Expense 0.00

Income 0.00

Actual Income 0.00

Status 25%

Last Updated 04/23/2012

Campaign: Bodies Rebuilt Sports
Related To Therapy