

## 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:

The screenshot displays the 'Marketing Calendar Office' interface. On the left, there is a navigation menu with options like 'Home', 'Calendar', 'Campaigns', 'Projects', 'Events', 'Tasks', 'Press Releases', 'Approvals', 'Contacts', 'Budget', and 'Reports'. The 'Tasks' section is active, showing a task titled 'Graphic Design for Web Ad'. The task is categorized as 'web' and is assigned to 'Fran Anderson'. The 'Approval from' is set to 'Every Weekday' starting on '04/23/20'. A list of contacts is shown for approval, with 'Marie Calendar', 'Paul Dean', and 'Sarah Lee' selected. The task status is '25%' and it was last updated on '04/23/2012'. The 'Related To' field indicates it's part of a campaign for 'On line Ads for Face Book & AMA'.

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:

Intuit Anderson  Jeremy Jones  Laura Jack

**Date** 04/23/2012 to 5/11/2012

**Assigned To** Fran Anderson

**Approval from**

- No Approval
- Every Weekday
- Weekly
- Bi-Monthly
- Monthly

**CC:**

- Lesley Jones
- Pamela Anderson
- Carrie Anderson
- Fran Anderson
- Intuit Anderson
- Jeremy Jones
- Laura Jack
- Maria Callender
- Paul Depp
- Paul Cubbins

Save as Template

**Budget**

- Expense 0.00
- Actual Expense 0.00
- Income 0.00
- Actual Income 0.00

**Status** 25%

**Last Updated** 04/23/2012

**Related To** Campaign: Marketing Calendar Office- Web Project: On line Ads for Face Book & AMA Resource Dir

**Comments** See specs for online ad space for FB and AMA Directory Web. Colorful, use copy from email promo.

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](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](#)

**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	<input checked="" type="radio"/> Approved <input type="radio"/> Denied <input type="radio"/> No Action
	Test Approval 4/4/12 Art Dept	Art Department		04/04/12	04/04/12	<input checked="" type="radio"/> Approved <input type="radio"/> Denied <input type="radio"/> No Action
	Graphic Design for Web Ad	Art Department	web	04/23/12	05/11/12	<input type="radio"/> Approved <input type="radio"/> Denied <input checked="" type="radio"/> 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  
<[franderson@clasamarketingandbranding.com](mailto:franderson@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<[franderson@clasamarketingandbranding.com](mailto:franderson@clasamarketingandbranding.com)>  
--- Approval status ---

**Approvals:**

**Task**  [Change Project/Event](#)

**Category**  [Clear Project/Event:](#)

**Reminder**  **Start:**

**CC:**  Art Department  Franpa Anderson  Lesley Jones  Pamela Anderson  Carrie Anderson  Fran Anderson  Intuit Anderson  Jeremy Jones  Laura Jack

**Date**  to

**Assigned To**

**Account #**

**Show on:**  
Dashboard   
Gantt   
color:

Art Department: APPROVED  
Lesley Jones: APPROVED  
Marie Callendar: NO ACTION  
Paul Dean: NO ACTION  
Sarah Lee: NO ACTION

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

**Reminder** No Reminder

(Start typing to filter contacts)

**CC:**  Lesley Jones  Pamela Anderson  
 Carrie Anderson  Fran Anderson  
 Intuit Anderson  Jeremy Jones  Laura Jack  
 Marie Callendar  Paul Dean  Paul Gubbins

Send Email

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

**Assigned To** Fran Anderson

**Approval from** Weekly

**CC:** Fran Anderson   
 (Start typing to filter contacts)

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

**Account #**

**Job #**

**Budget**  
Expense   
Actual Expense   
Income   
Actual Income

**Status** 25%

**Last Updated** 04/23/2012

**Related To** Campaign: Bodies Rebuilt Sports Therapy