<u>**Allied Financial Software Knowledgebase**</u>

How to Manage the ACT! 2007 Scheduler

You would like information regarding the ACT! Scheduler.
Answer
The ACT! Scheduler utility, introduced with ACT! 2006, has been improved for ACT! 2007. As before you can perform unattended Back ups and/or database Synchronizations. Database Maintenance, and Outlook and ACT! calendar synchronization have been added. These functions are also unattended. You must have the ACT! Scheduler running but ACT! and/or your databases can be close. Each database can have only one scheduled task of each type. A log of scheduled events is also provided in this utility. Using the ACT! Scheduler, you can create, edit or delete a scheduled task for each type of function. You can temporarily stop the scheduled task service or restart this service when it is stopped. Follow the steps below to manage the ACT! Scheduler:

1. Click the Tools menu, and then click ACT! Scheduler. The ACT! Scheduler - Create, Edit or Delete a Task panel appears:

2. From the Schedule Tasks section, you can Create a task to schedule an automatic task.

Note: An automated schedule for synchronization can only be created from a Remote database.

3. Click an existing task in the list, and then click Edit a task to change the parameters of the scheduled task or click Delete a task to remove the selected task. Refer to the following Knowledge Base Answers for detailed information on scheduling automatic database tasks:

Title: How to Automatically Back Up Your Database

Title: How to Automatically Synchronize Your ACT! and Microsoft® Outlook Calendars

Title: How to Manage Automatic Database Maintenance

Other Tasks Section:

4. You can click the Stop Service link to temporarily prevent your scheduled task(s) from running. Similarly, if the ACT! Scheduler service is stopped, you can click the Start Service link to restart your scheduled task(s).

This service can also be stopped and started from the Services panel. Use the following steps to access the Services panel:

a. Click the Windows® Start button, and then click Run. The Run dialog box appears.

b. Type services,msc in the Open field, and then click OK. The Services panel launches.

c. Right-click the ACT! Scheduler item from the Name column, and click Stop or Start from the shortcut menu.

d. Close the Services panel.

5. Click the View Task Log link to examine details regarding the results of the automated tasks. The View

Task Log window appears:

6. The task log includes details on the schedule, database and results of the automated task(s). You may erase the log by clicking the Purge List button. Otherwise, click OK to return to the ACT! Scheduler - Create, Edit or Delete a Task dialog box.

7. About ACT! Scheduler provides version and copyright information.

8. Details provides the details for a selected task from the right pane.

9. Click Exit to close the ACT! Scheduler - Create, Edit or Delete a Task panel.

http://kb.actforadvisors.com/questions.php?questionid=27