

Activity Type

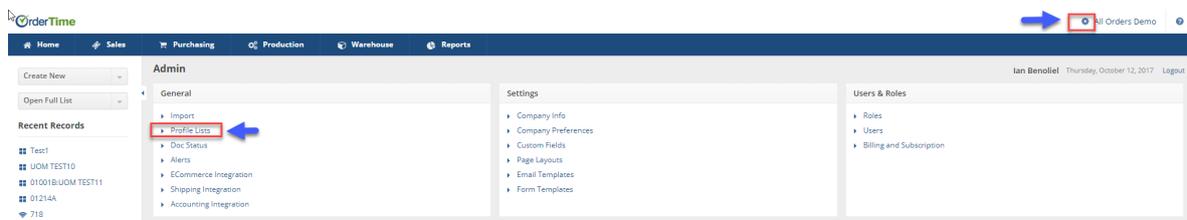
Last Modified on 02/21/2024 10:54 am EST

Overview

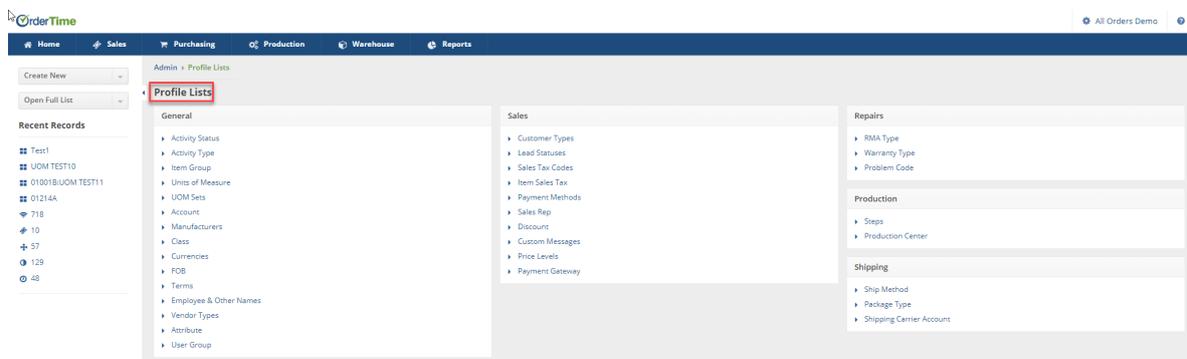
Activity Type is used to categorize various types of Activities within your company.

Properties

Activity Type, also called Base Type tells the system what type of activity is referenced. There are four base types: Task, Event, Log, Email. You can create different Activity Types for Task like Collect Payment or Send Samples. To create a record for an activity type click on the Gear icon then select Profile List under the General Section.



On the Profile Lists screen, select Activity Type under the General section.

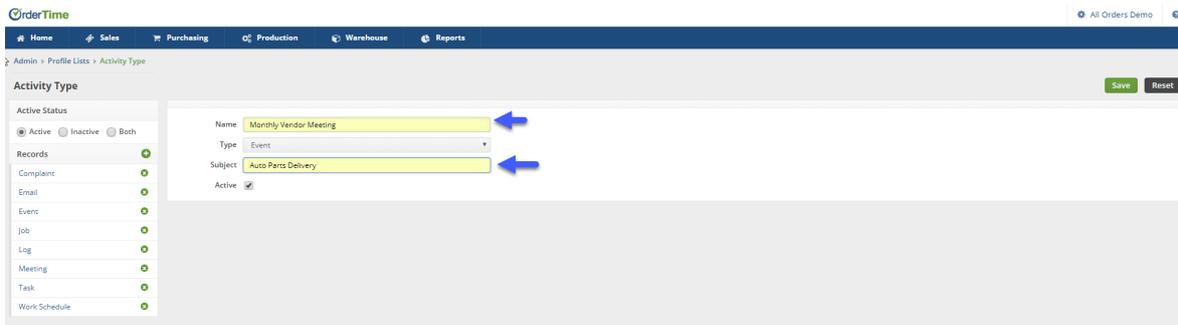


On the Activity Type screen, you can enter a Name for your new activity and categorize as an Event, Task or Log. If needed enter a Subject for your Activity. The subject will auto default every time you select this activity.



You can create as many Activities as your business requires, these can be activated or inactive as you see fit. If you need to be reminded or keep track of specific function within your organization an Activity type can be a useful tool.

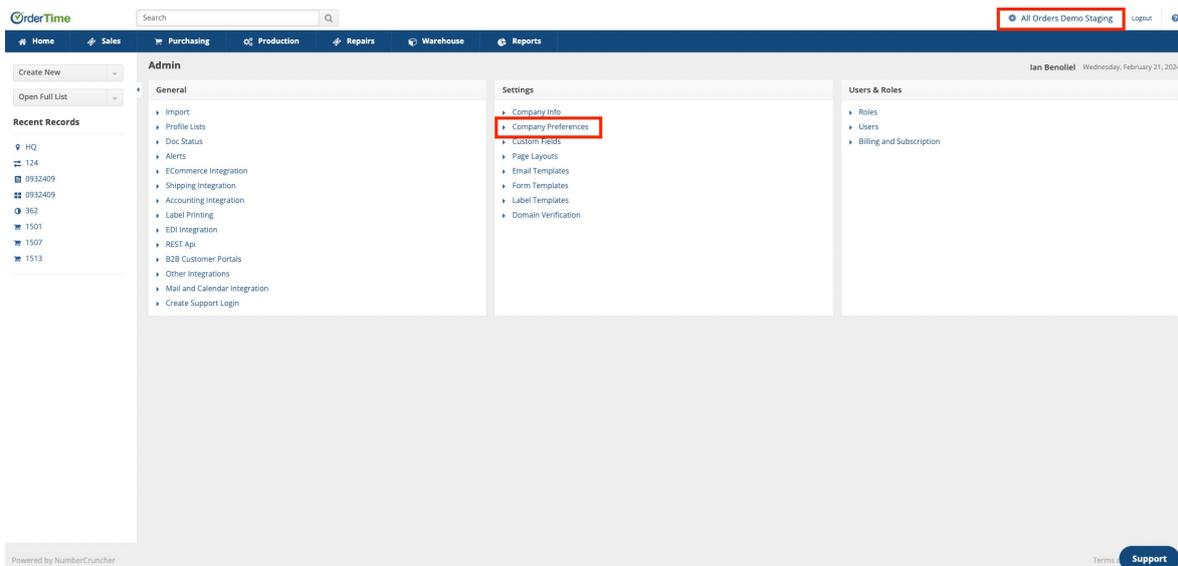
Click on **Save** when done.



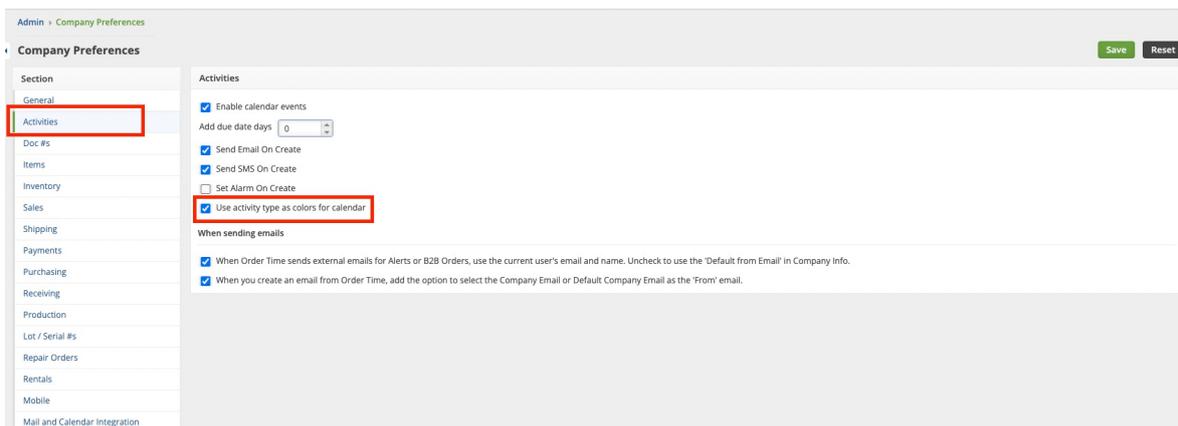
Color Coding a Calendar Event

If you would like to color code the Events on your home screen calendar follow the steps below.

In order to start color coding a calendar event first go to admin by clicking the company name in to top right corner and then company preferences.



From there, click **Activities** and select the "**Use activity as colors for the calendar**" check box and then hit **save**.



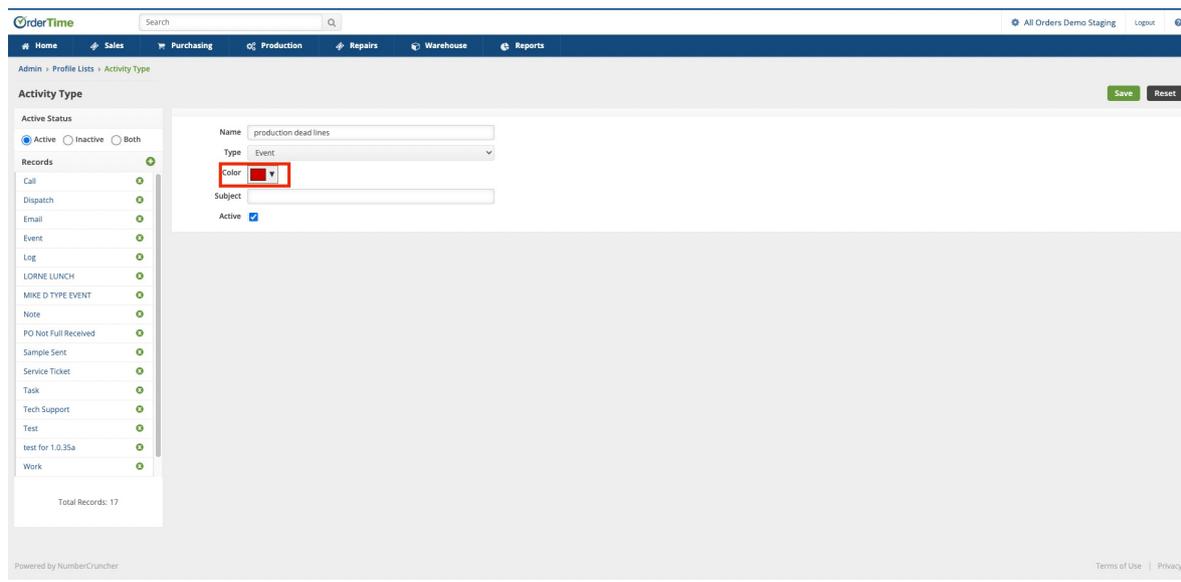
To choose the color for events in Order Time, follow these steps:

- Click on your company name in the top right corner of the Order Time screen.
- Select **"Profile List"** under the General section.
- Choose **"Activity Type"**

From there you can assign colors to the Event-type activities of your choosing.

Hit **save** in the top right once you finished.

 **Note: The only activity types available for color coding are Events**



OrderTime

Admin > Profile Lists > Activity Type

Active Status: Active Inactive Both

Records: Call, Dispatch, Email, Event, Log, LORNE LUNCH, MIKE D TYPE EVENT, Note, PO Not Full Received, Sample Sent, Service Ticket, Task, Tech Support, Test, test for 1.0.35a, Work

Name: production dead lines

Type: Event

Color: ▼

Subject:

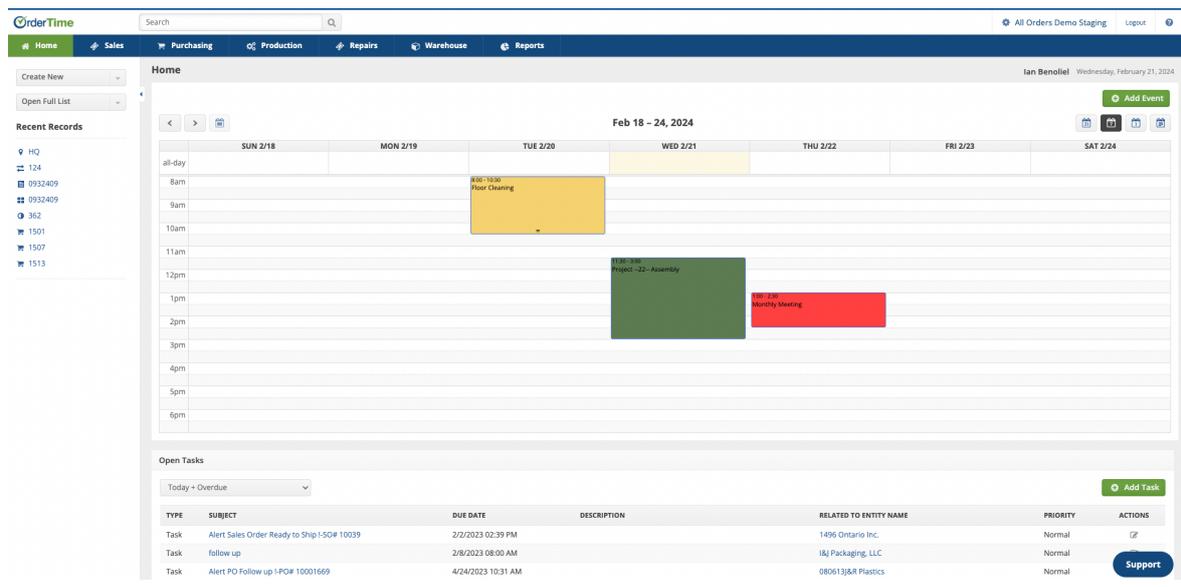
Active:

Save Reset

Total Records: 17

Powered by NumberCruncher

Now that you have followed these steps the events you chose to color code should be easily identifiable and look something like this on the dashboard.



OrderTime

Home

Feb 18 - 24, 2024

	SUN 2/18	MON 2/19	TUE 2/20	WED 2/21	THU 2/22	FRI 2/23	SAT 2/24
all-day							
8am			8:00 - 10:30 Floor Cleaning				
9am							
10am							
11am							
12pm				11:00 - 12:00 Project - 22 - Assembly			
1pm							
2pm						2:00 - 2:30 March Meeting	
3pm							
4pm							
5pm							
6pm							

Open Tasks

TYPE	SUBJECT	DUE DATE	DESCRIPTION	RELATED TO ENTITY NAME	PRIORITY	ACTIONS
Task	Alert Sales Order Ready to Ship 150# 10039	2/2/2023 02:39 PM		1496 Ontario Inc.	Normal	<input checked="" type="checkbox"/>
Task	follow up	2/8/2023 08:00 AM		ISJ Packaging, LLC	Normal	<input type="checkbox"/>
Task	Alert PO Follow up 1PO# 10001669	4/24/2023 10:31 AM		ORONIS&R Plastics	Normal	<input type="checkbox"/>

Support

For more information regarding events please see: [Managing Events and Tasks from a Details Page](#)