

Adding Events and Tasks from Details Page

Last Modified on 02/14/2018 10:11 am EST

Overview

An Activity is a way to document an action that will or has occurred by one or more of your users. The primary activities are *Event* and *Task*. For example, if you want to remind a sales rep to follow up on an order, you would create a Task for the sales rep. If you have, for example, a conference to attend, you can add this as an event and it will reflect on your calendar.

Using the Activities Schedule

All Activities share common properties including assignees, subjects and descriptions. In addition, Activities can be related to Entities and Documents (e.g. *Customer* or *Sales Order*). Therefore, you will be able to manage activities related to a specific customer directly from its *Details Page*.

- **Event**

Creating a New Event in Activity Schedule

The Activity Schedule allows you to schedule events for company transactions, meetings, deliveries, warehouse events, or anything else of importance that requires scheduling. The system will remind assigned employees of any scheduled event assigned to them.

You will have the flexibility to view your company events on a daily, weekly or monthly basis. With our *View Schedule* function, you can also see a listing of employee assignments on the calendar.

To create an Activity Schedule complete the following steps below:

1. On the Home landing page, click the **+Add Event** icon to the right of the screen.
2. The **New Event** screen will be displayed. Use the **Assigned To** drop down menu to select the employee.
3. Select the **Activity Type** from the drop down menu (e.g. Event, Meeting, Job).
4. Type a subject (e.g. Direct Auto Repair/Customer Sales).
5. Optional: Select **All Day** event (if needed).
6. Click on the calendar to set a Start Date and End Date with the corresponding time
7. Select the appropriate activity (e.g. Customer, Lead, Sales Order, Quote) from the **Related To** drop down menu.
8. Set the Alarm to the desired amount of time.
9. Type a description for the Event.
10. Click **Save** when done.

The screenshot shows the 'New Event' form in the OrderTime system. The form is titled 'New Event' and is part of the 'Activities > Activity' section. It contains several fields: 'Assigned To' (Rafael Lopez), 'Activity Type' (Event), 'Subject' (Auto Parts Delivery), 'Start Date' (7/14/2017 02:00 PM), 'End Date' (07/14/2017 03:00 PM), 'Related To' (Customer), and 'Alarm' (30 Minutes). There is a 'Description' field with a text area containing the text: 'Customer Ian Smith- Has scheduled a delivery of 50 auto parts to his warehouse. Rafael to ensure that product is packed and ready to ship'. At the bottom, there are 'Custom' and 'Invitees' sections with input fields for 'UPS #' and 'team viewer no'. A 'Save' button is visible in the top right corner. Blue arrows point to the 'Save' button, the 'Subject' field, and the 'Description' field.

Your recently added event will be displayed on the Activity Schedule screen on the Home page. The schedule can be viewed on a monthly, weekly or daily format. Simply click on the Month, Week, or Day icon to the right of the screen to chose the calendar display.

The screenshot displays the OrderTime software interface. At the top, there is a navigation menu with options: Home, Sales, Purchasing, Production, Warehouse, and Reports. The user is logged in as Ian Benoitel on Friday, July 14, 2017. The main section is titled 'Home' and shows a calendar for July 2017. Two tasks are highlighted: '11:30a Line Meeting' on Tuesday, July 11, and 'ReAuto Parts Delivery' on Friday, July 14. A blue arrow points to the 'Add Event' button in the top right corner. Below the calendar is an 'Open Tasks' section with a dropdown menu set to 'Today - Overview' and an 'Add Task' button. The 'Open Tasks' table contains the following data:

ACTIVITY TYPE	SUBJECT	DUE DATE	DESCRIPTION	ASSIGNED TO	PRIORITY	ACTIONS
Task	Reminders date	5/30/2017 07:00 PM	Reminders pop hrs. Today filter on home page	Ian Benoitel	Critical	☑
Task	Value adjustments	6/2/2017 09:00 AM	Something is up with the value adjustments validation and details page	Ian Benoitel	Normal	☑
Call	Call the	7/1/2017 08:00 AM		Ian Benoitel	Normal	☑
Call	Hello	7/10/2017 12:00 PM		Ian Benoitel	Normal	☑

• Task

Assigning Tasks to Individuals in your Organization

The Activity Schedule allows you to schedule tasks for employees in your company. The system will remind employees of the tasks assigned to them. You will have the flexibility to view tasks by Activity Type, Subject, Due Date, Description, Assigned To, and Priority.

You can assign a new task by following the steps below:

1. Click the **+Add Task** icon. The **New Task** screen will be displayed. Use the **Assigned To** drop down menu to select the employee.

The screenshot shows a user interface for adding tasks. At the top right, there is a green button labeled "Add Event" and four calendar icons. Below this is a large, empty form area with a yellow header bar and several horizontal lines for text entry. At the bottom right of the form area, a green button labeled "Add Task" is highlighted with a red rectangular box. Below the form area, there is a table header with three columns: "ASSIGNED TO", "PRIORITY", and "ACTIONS".

2. Schedule a *Due Date* from the calendar. Enter the time in the field provided.
3. In *Activity Type*, select the type from the drop down menu (e.g. Call, Task, Email, Log, Complaint).
4. In *Related To*, select from the drop down menu (e.g. Customer, Lead, Sales Quote)
5. Enter a *Subject* to provide further information.
6. In the *Description* information box, provide a brief information of the assigned task.
7. In *Status*, select the appropriate status from drop down menu (e.g. Open, Closed, In Progress, Not Required).
8. Set the *Priority* assigned to the task (e.g. Low, Normal, High, Critical).
9. Click **Save**.

There are two system pre-define options for activity status. All activity types will be either in the open or closed status. The user is able to change the Activity Type and Subject.

The screenshot shows the 'New Task' form in the OrderTime system. The form is divided into several sections. The top section contains the following fields: 'Assigned To' (Ian Bendriel), 'Due Date' (7/14/2017 08:00 AM), 'Activity Type' (Call), 'Subject' (Hello), 'Status' (Open), 'Contact' (Customer), 'Priority' (Normal), and 'Email'. Below these fields is a 'Description' field. At the bottom, there is a 'Custom' section with fields for 'UPS #' and 'team viewer no'. Blue arrows point to the 'Assigned To', 'Due Date', 'Activity Type', 'Subject', 'Status', and 'Description' fields.

Your Tasks will be displayed on your Activity Schedule.

The screenshot shows the 'Open Tasks' table in the OrderTime system. The table has a filter for 'This Month' and an 'Add Task' button. The table contains the following data:

ACTIVITY TYPE	SUBJECT	DUEDATE	DESCRIPTION	ASSIGNED TO	PRIORITY	ACTIONS
Call	Call the	7/1/2017 08:00 AM		Ian Bendriel	Normal	☑
Call	Hello	7/10/2017 12:00 PM		Ian Bendriel	Normal	☑
Task	Complaint	7/14/2017 05:00 PM	Complete inventory control by Friday.	Ian Bendriel	High	☑

At the bottom right of the table, there is a link for 'Open Full List'. The footer of the page includes 'Powered by NumberCruncher' and 'Terms of Use | Privacy'.