

# Adding Events and Tasks from Details Page

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## 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 application. 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 and a 'Reset' button are located at the top right of the form. 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's name 'Ian Benoit' and the date 'Friday, July 14, 2017' are shown in the top right. Below the navigation is a calendar for July 2017. Two tasks are highlighted with blue bars: '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, and another blue arrow points to the 'ReAuto Parts Delivery' task. 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 Benoit	Critical	☑
Task	Value adjustments	6/2/2017 09:00 AM	Something is up with the value adjustments validation and details page	Ian Benoit	Normal	☑
Call	Call the	7/1/2017 08:00 AM		Ian Benoit	Normal	☑
Call	Hello	7/10/2017 12:00 PM		Ian Benoit	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.

Add Event

Add Task

ASSIGNED TO	PRIORITY	ACTIONS
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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. At the top, there are navigation tabs: Home, Sales, Purchasing, Production, Warehouse, and Reports. The main form area is titled 'New Task' and includes the following fields and options:

- Assigned To:** A dropdown menu with 'Ian Bendriel' selected. A blue arrow points to this field.
- Due Date:** A date and time picker showing '7/14/2017' and '08:00 AM'. A blue arrow points to the time field.
- Activity Type:** A dropdown menu with 'Call' selected. A blue arrow points to this field.
- Subject:** A text input field with 'Hello' entered. A blue arrow points to this field.
- Status:** A dropdown menu with 'Open' selected. A blue arrow points to this field.
- Contact:** A dropdown menu with 'Normal' selected. A blue arrow points to this field.
- Description:** A large text area with a blue arrow pointing to it.
- Custom:** A section with two input fields: 'UPS #' and 'team viewer no'.

Your Tasks will be displayed on your Activity Schedule.

The screenshot shows the 'Open Tasks' table in the OrderTime system. The table is titled 'Open Tasks' and includes a filter for 'This Month'. The table has the following columns: Activity Type, Subject, Due Date, Description, Assigned To, Priority, and Actions. The table contains three rows of 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	☑