

Adding New Events and Tasks

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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.

- **Event**

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. Select a *Contact*.
11. Select *Recurrence* if needed. Set the *Recurrence* details.
12. Click **Save** when done.

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.

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	<input type="checkbox"/>
Task	Value adjustments	6/2/2017 09:00 AM	Something is up with the value adjustments validation and details page	Ian Benoitel	Normal	<input type="checkbox"/>
Call	Call che	7/1/2017 08:00 AM		Ian Benoitel	Normal	<input type="checkbox"/>
Call	Hello	7/10/2017 12:00 PM		Ian Benoitel	Normal	<input type="checkbox"/>

• 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 these 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.

OrderTime All Orders Demo

Home Sales Purchasing Production Warehouse Reports

Home > Activities > Activity

New Task Save Reset

Assigned To: Ian Benoitel Activity Type: Call

Subject: Hello Status: Open

Due Date: 7/14/2017 08:00 AM Contact: [dropdown]

Related To: Customer Priority: Normal

Phone: [input] Email: [input]

Alarm: 30 Minutes

Description: [input]

Custom

UPS #: [input]

team viewer no: [input]

All Tasks where the Activity Type has a Type is Call or Task will be displayed on your Activity Schedule.

Open Tasks Add Task

This Month

ACTIVITY TYPE	SUBJECT	DUE DATE	DESCRIPTION	ASSIGNED TO	PRIORITY	ACTIONS
Call	Call the	7/11/2017 08:00 AM		Ian Benoitel	Normal	<input type="checkbox"/>
Call	Hello	7/10/2017 12:00 PM		Ian Benoitel	Normal	<input type="checkbox"/>
Task	Complaint	7/14/2017 05:00 PM	Complete inventory control by Friday.	Ian Benoitel	High	<input type="checkbox"/>

Open Full List

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To have other Activity Types display in your Activity Schedule, follow the [Activity Type guide](#) to create a new Activity Type with a **custom name** and **MAKE SURE TO SET THE TYPE TO TASK**

[More about Customer Management with Order Time](#)