

Managing Events and Tasks from a Details Page

Last Modified on 09/14/2023 3:27 pm EDT

Overview

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 the customer's *Details Page*.

- **Event**

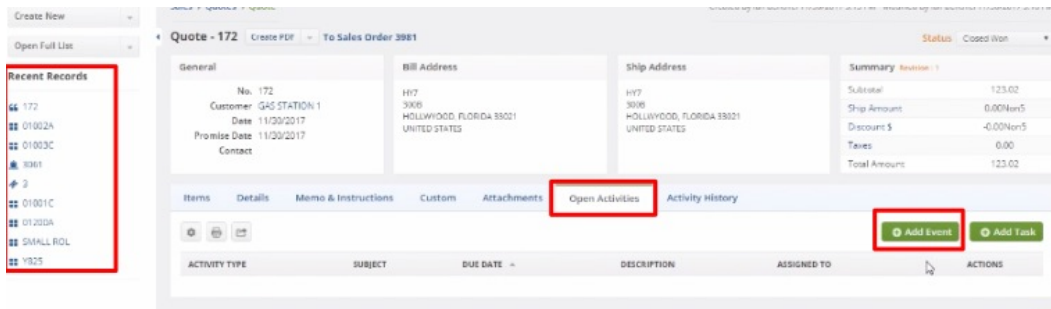
Add/Edit Event

Events may be seminars, company transactions, meetings, deliveries, or anything else of importance that need to be schedules. The system will remind assigned employees of any scheduled Event(s) assigned to them. You can add an Event from the home page.

Alternatively, you can add an Event from a record's details page.

Follow the steps below to add an event from a details page:

1. Click the record that you want to open from the list on the left side of the screen.
2. When the record opens up, go to the **Open Activities** tab. Click the **+Add Event** button.



3. Fill out the pop-up form. Click **Save**.

• Task

Add/Edit Task

A Task is an **activity** that requires action on the part of the assignee. You can create different **types** of tasks, for example, *call* and *send samples*. A Task has two states: *Open* and *Closed*. You set the state of an activity using **statuses**. Each status has a property named *Closed*. When you change the status of an activity to a status in which *Closed* is **true** (checked), then that activity will be closed and the closed date will be recorded.

You can add or edit a Task from the home page or from within a related record. For example, the following shows the same Task being edited from the home page and a customer details page. You will notice they are virtually identical except when editing from the home page you will see the *Related To* property whereas from the customer details page the *Related To* property is hidden because it is automatically set.

Edited from the Home Page

Edited from Customer Detail

Below are the steps for adding/editing task from a details page:

1. Click the record that you want to open from the list on the left side of the screen.
2. When the record opens up, go to the **Open Activities** tab. Click the **+Add Task** button.

3. Fill out the pop-up form. Click **Save**.

Changing the status to a Closed status will move the Activity from the Open Activities to the **Activity History** Tab.

ACTIVITY TYPE	SUBJECT	CLOSED DATE	DESCRIPTION	ASSIGNED TO	ACTIONS
Call	Create the order	11/12/2017 08:52 AM		Ian Benollel	
Call	What is the status of the PO	11/12/2017 09:06 AM	Call Ian to see if he is ready to make the order.	Josh Berman	



Contacts will be shown only if related to sales transactions, customers and leads. Email and phone will **not** show when *Adding* an activity but will show when *Editing* one.

More about Customer Management with Order Time