Activity

Activity Basics

Activities are the single, individual tasks that need to be performed by your company's representatives. Examples of Activities include a meeting, a product demonstration, sending an email and making a telephone call. You can schedule Activities that are related to companies, contacts, opportunities and incidents, and you can schedule activities that are not related to an entity record. When you do, these Activities appear on your To-Do list and/or Calendar Dashboard, until they are completed and saved with a Result code.

Users record what has happened, or schedule future tasks, using **Activities**. There is a variety of setup codes associated with activities.


There are three major components involved in creating an Activity:

- **Action**: Describes the kind of interaction such as email, meeting, phone call, etc.
- **Result**: Describes how the Action was completed, such as sent, left message, or completed. These are linked to the various Actions accordingly. Results are used to trigger the removal of the Activity from the To-Do list.
- **Action Set:** Defines the set of actions that are available to a user or group of users. *All Actions must be included in at least one Action set*.

Action

1. Click Activity to open the Activity Code search window (No Activity codes are displayed yet)

2. Click the Search button to display all the Activity Codes currently defined.

3. Click the New button to add a new Activity Code.
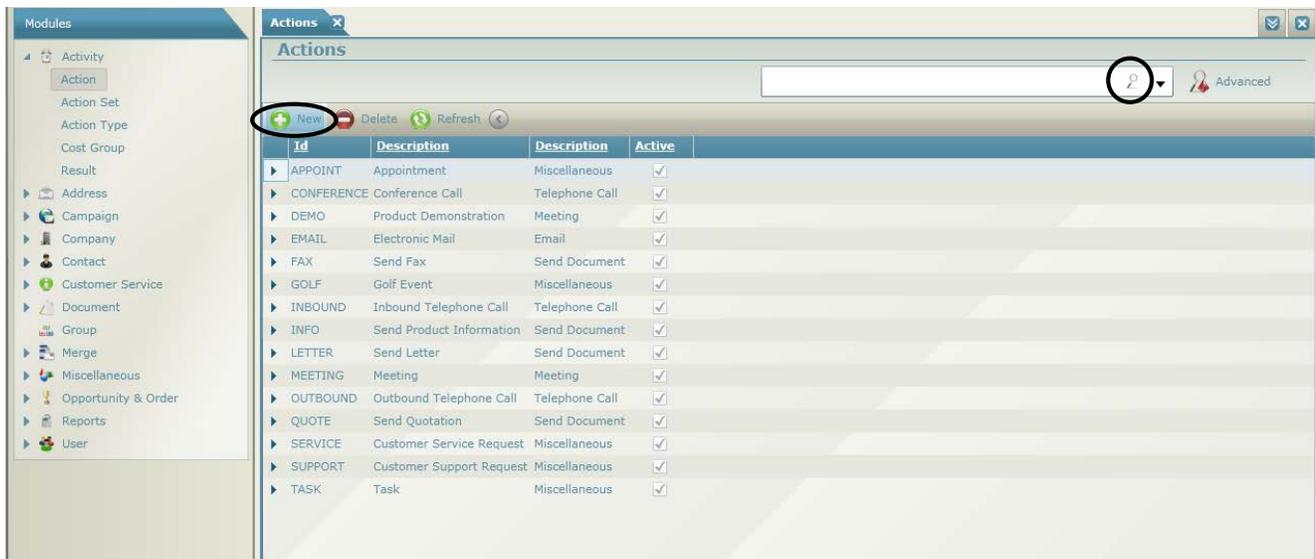
4. Type an **ID Code** and a **Description**. Note that the DESCRIPTION (not the Code) is what the user will see when they are logging Activities).
5. Click the newly added Action Code to open the detailed setup screen:
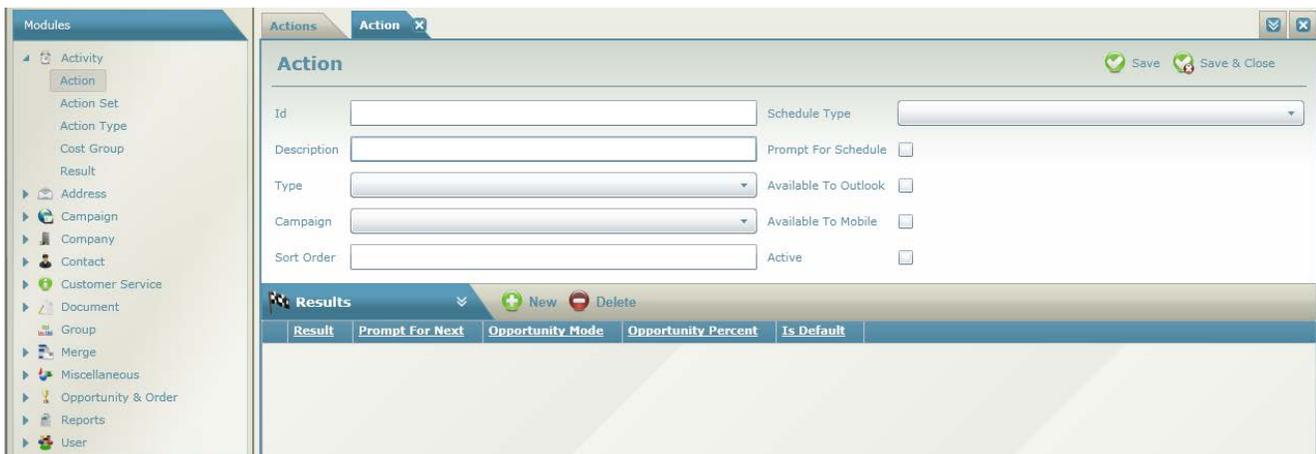
6. Optional: Choose an **Action Type** to categorize the code for reporting purposes, and assign a **Campaign** to associate the action with a specific campaign.
7. **Outlook integration** is affected by **Schedule Type** and **Prompt for Schedule**. Choose Appointment or Task for Schedule Type to add this type of activity to the user's Outlook calendar or task list. Select a value for **Prompt for Schedule** to display a prompt, automatically add the calendar or task item or not display a prompt or add the item.
8. Select the **Results** tab to define the options for completing this **Activity** (such as Sent, Completed, Left Message). **Results** are possible outcomes for an activity. They complete an activity and remove it from the user's To Do List. Activities can have one or more Results.
9. Click New to add one or more **Results** for the **Action**.

Result
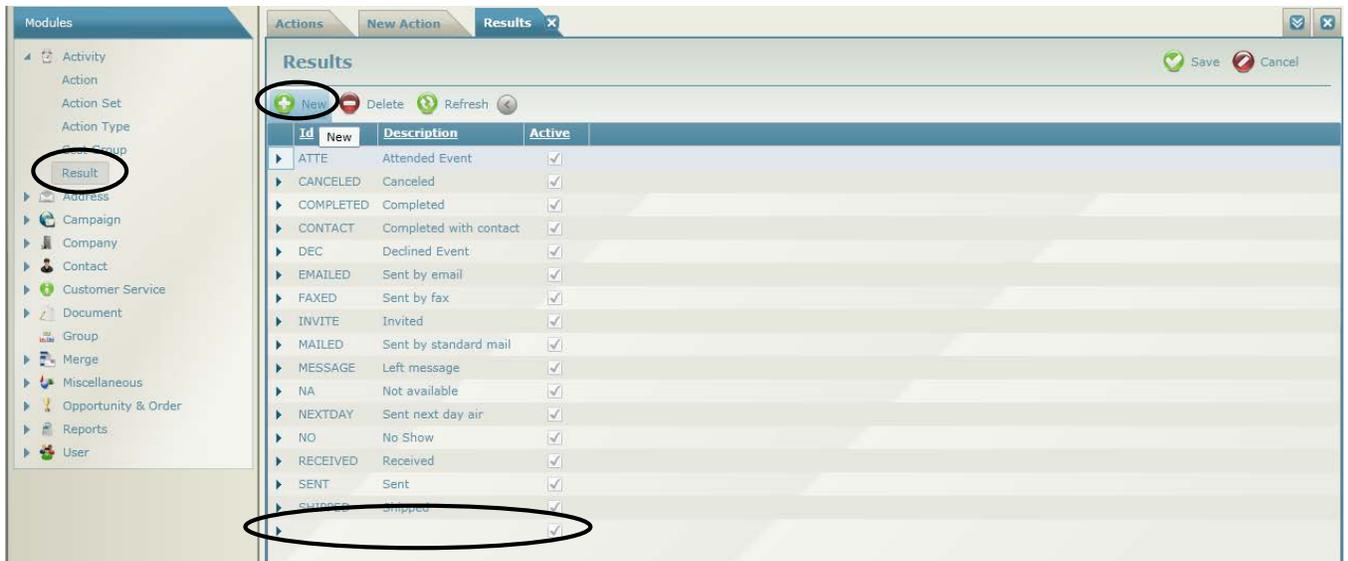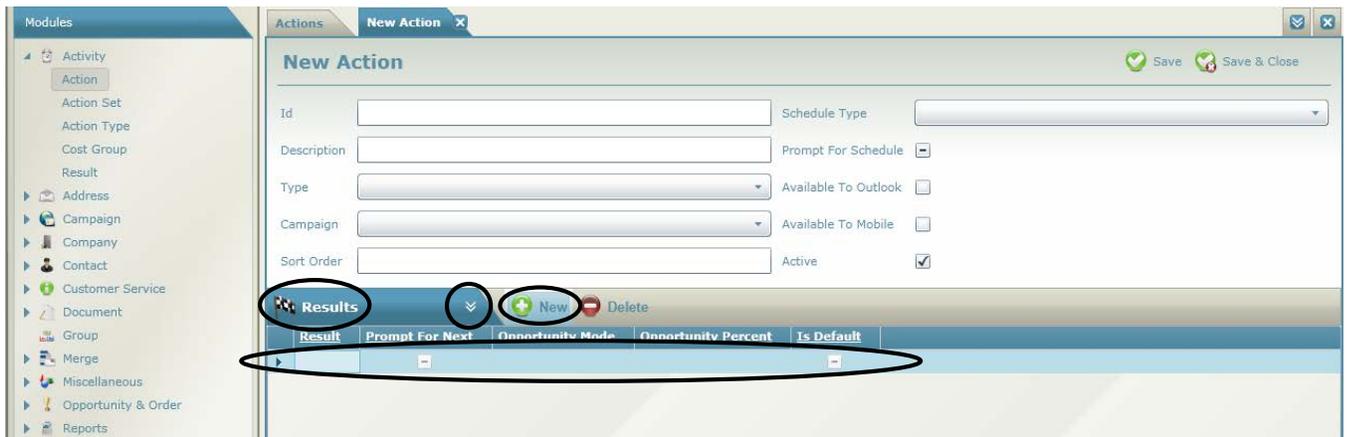
10. Assign this **Action** to one or more user groups on the **Action Set** tab.

Action Set
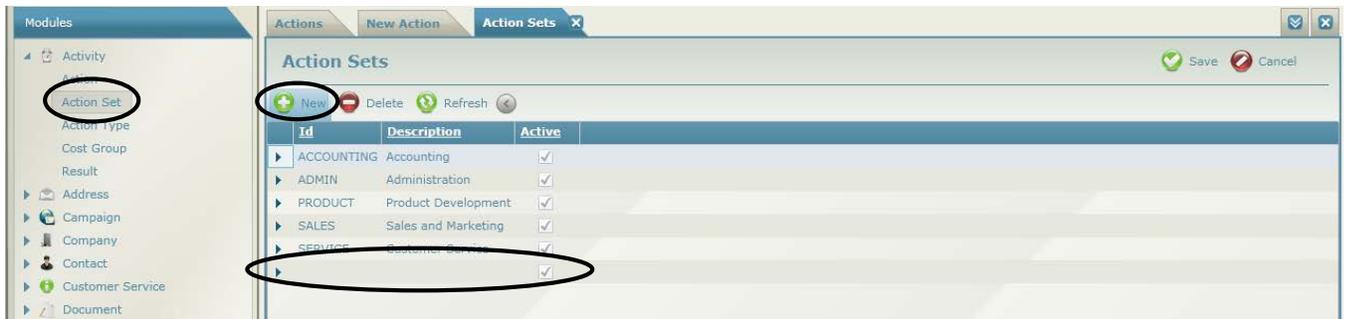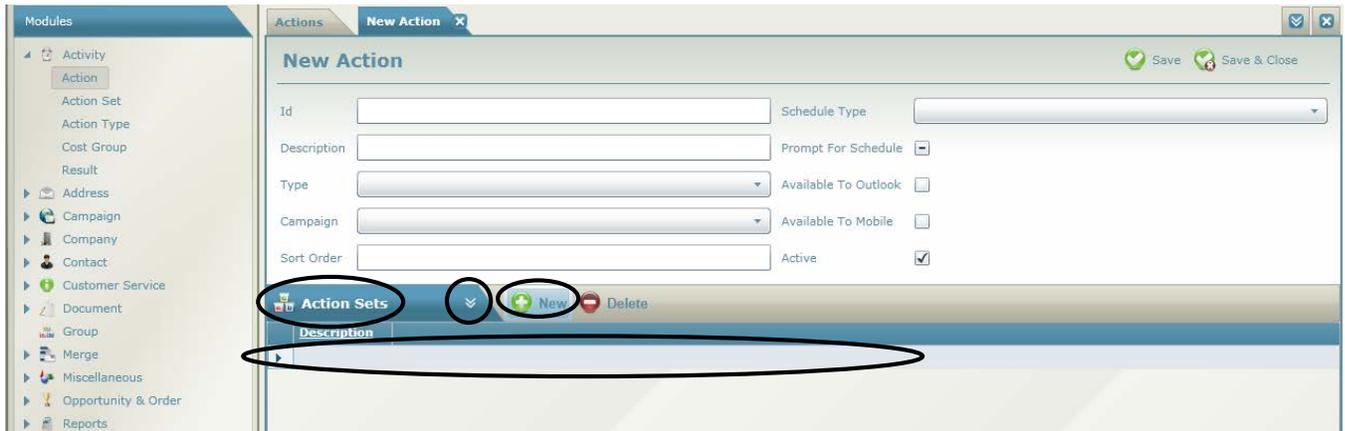
Action Sets identify categories of Actions for a specific subset of users. They are used to limit the action codes available to a user's area of responsibility.

At least one Action Set must be set up. If all users use the same Actions, one Action Set must exist, and all Actions should be assigned to it.

Actions link to Action Sets on the **Action Set** tab on the **Setup – Action** window.

Each user is assigned to one Action Set on the main form of the **Setup – User** window. This determines the activities the user can create.