Creatio Academy

Activities

Version 7.17

Table of Contents

Create an activity

PRODUCTS: ALL CREATIO PRODUCTS

Use Creatio activities to manage your working hours, create schedules, plan activities for other employees, track interconnections between activities and other Creatio sections, and keep records of completed tasks.

There are several quick filters available in the section:

- By date ([*Start*] and [*Due*] fields) – displays activities that overlap with the specified period. For example, if the activity period is longer than the one specified in the quick filter and these periods overlap, Creatio will display the activity.
- By employee – displays the activity records in which the selected contact is listed as a participant. The records are filtered by data in the [*Participants*] detail of an activity page.

In Creatio, a task can be:

- added manually.
- received through MS Exchange synchronization.
- received through Google synchronization.

Create an activity from the section list

> **Note.** Creatio will add the contact specified in the [*Owner*] or [*Contact*] field to the [*Participants*] detail automatically. Copying an activity will copy the list of its participants too.

1. Open the [*Activities*] section.
2. Click the [*New task*] button. This will open a box.
3. Specify the main task data in the box.

<table>
<tr><td>Title</td><td>The goal of the activity, for example, “Prepare documents” or “Present an offer.”</td></tr>
<tr><td>Start</td><td rowspan="2">The date and time when the activity should be started and finished. By default, the [Due] field value is set to 30 days after the [Start] field value. Use the icon when planning activities for participants in different time zones.</td></tr>
<tr><td>Due</td></tr>
<tr><td>Status</td><td>Activity status. For example, “In progress” or “Completed.”</td></tr>
<tr><td>Owner</td><td>The user who is responsible for completing the activity.</td></tr>
<tr><td>Category</td><td>Activity category. For example, “Meeting” or “Paperwork.”</td></tr>
</table>

4. Click [*Save*].

   As a result, a new record will be added to the [*Activities*] section.

5. Open the [*Activities*] section list. Select a record in the section list and click [*Open*]. This will open a new page.
6. Provide more information about the task on the [*General info*] tab of the newly-opened page.

   a. Use the [*Connected to*] detail to add information about other Creatio objects connected to the activity.

<table>
<tr><td>Account</td><td rowspan="2">Company or person connected to the activity. If you select a contact, Creatio will populate the [Account] field with the company specified on the contact page.</td></tr>
<tr><td>Contact</td></tr>
<tr><td>Contract</td><td>Contract connected to the activity.</td></tr>
<tr><td>Opportunity</td><td>An opportunity whose part the activity is. If you select an opportunity, Creatio will populate the [Account] and [Contact] fields with the data from the fields of the selected opportunity.</td></tr>
<tr><td>Document</td><td>Document connected to the activity.</td></tr>
<tr><td>Invoice</td><td>Invoice connected to the activity.</td></tr>
<tr><td>Order</td><td>Order connected to the activity.</td></tr>
<tr><td>Lead</td><td>A potential customer for whom you create the activity. If you select a lead, Creatio will populate the [Account] and [Contact] fields with values from the lead page.</td></tr>
<tr><td>Project</td><td>The project connected to the task. If you select a project, Creatio will populate the [Contact], [Account], and [Opportunity] fields with the data from the fields of the selected project.</td></tr>
</table>

b. Create activity reminders in the [*Reminders*] field group.

<table>
<tr><td>Remind owner</td><td rowspan="2">Remind the owner and/or author about the activity at a specified time. Creatio will display the information about new reminders on the owner's and/or author's communication panel.</td></tr>
<tr><td>Remind author</td></tr>
<tr><td>Remind on</td><td>The date on which the activity owner or author will receive the reminder.</td></tr>
</table>

7. Specify the list of contact persons who participate in the task/call on the [*Participants*] tab. By default, you add a participant to the detail from the contact list, the detail will display the information from the [*Job title*] and [*Business phone*] fields of the contact page. Also, the activity will appear in the activity list of all users specified in the detail.
8. Add more information about the task, as well as files and links to the web resources related to the activity on the [*Attachments and notes*] tab.
9. Click [*Save*].

Create a connected activity

Connected activities let employees copy all connections from a given activity to a new one, saving your employees' time. To create a connected activity:

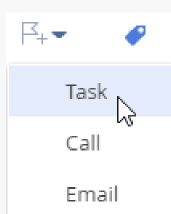


Fig. 1 Select the type of the connected activity

1. Go to the [*Activities*] section.
2. Open the record of the relevant task.
3. Click on the toolbar and select the type of the activity to create (Fig. 1). This will open a new page.
4. Specify the title and, if necessary, the start and due time on the newly-opened page.
5. Select the [*Show in calendar*] checkbox to make the activity appear in the [*Calendar*] view of the [*Activities*] section.

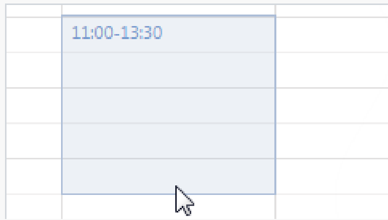
   This will create a new activity with all of the source activity's data about the author, owner, and connected objects. If the source activity has the [*Result details*] field filled out, the value of the field will be copied to the title of the connected activity. Creatio does not display the connection between the source activity and the connected activity.

Create an activity from the calendar

You can add tasks to the section directly from the calendar. To do this:

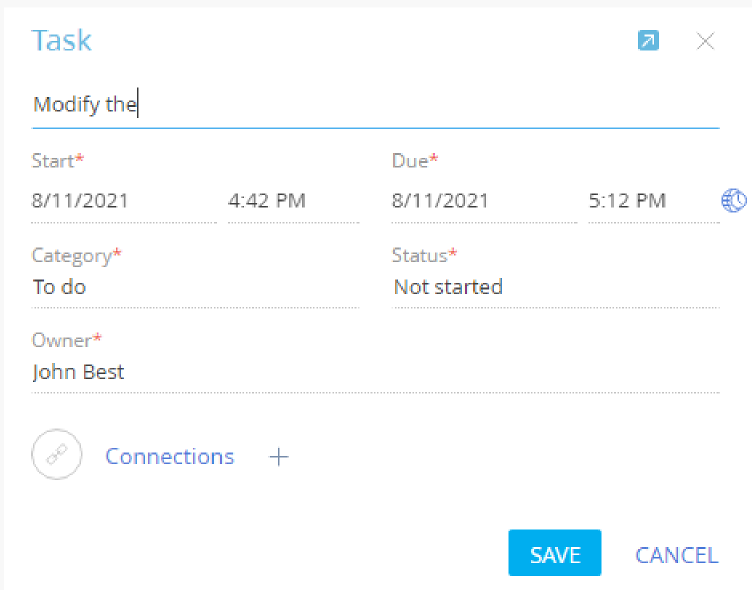
1. Drag the cursor to highlight the period required to complete the activity (Fig. 2).

Fig. 2 Highlight a period in the calendar view



2. Start typing the activity title. An activity mini page with the text you have already entered will open (Fig. 3).

Fig. 3 Add the task



3. Enter the text, if necessary, connect the activity to other Creatio records, and save the changes.

   This will add a new task to Creatio.

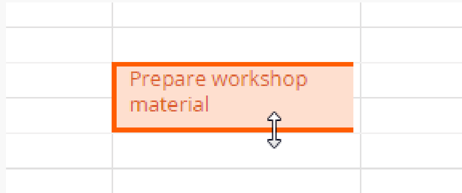
Edit an activity in the calendar

To edit an existing activity in the calendar view:

1. Click the **title** of the needed record in the calendar area. This will open the activity mini page.
2. Click the button to switch the mini page to edit mode, make necessary changes, e. g., duration, status, owner, and save the mini page.

   You can change activity duration without opening its mini page. To do this, hover over the activity border and drag the activity to the desired time mark (Fig. 4).

Fig. 4 Change the activity duration in the calendar view



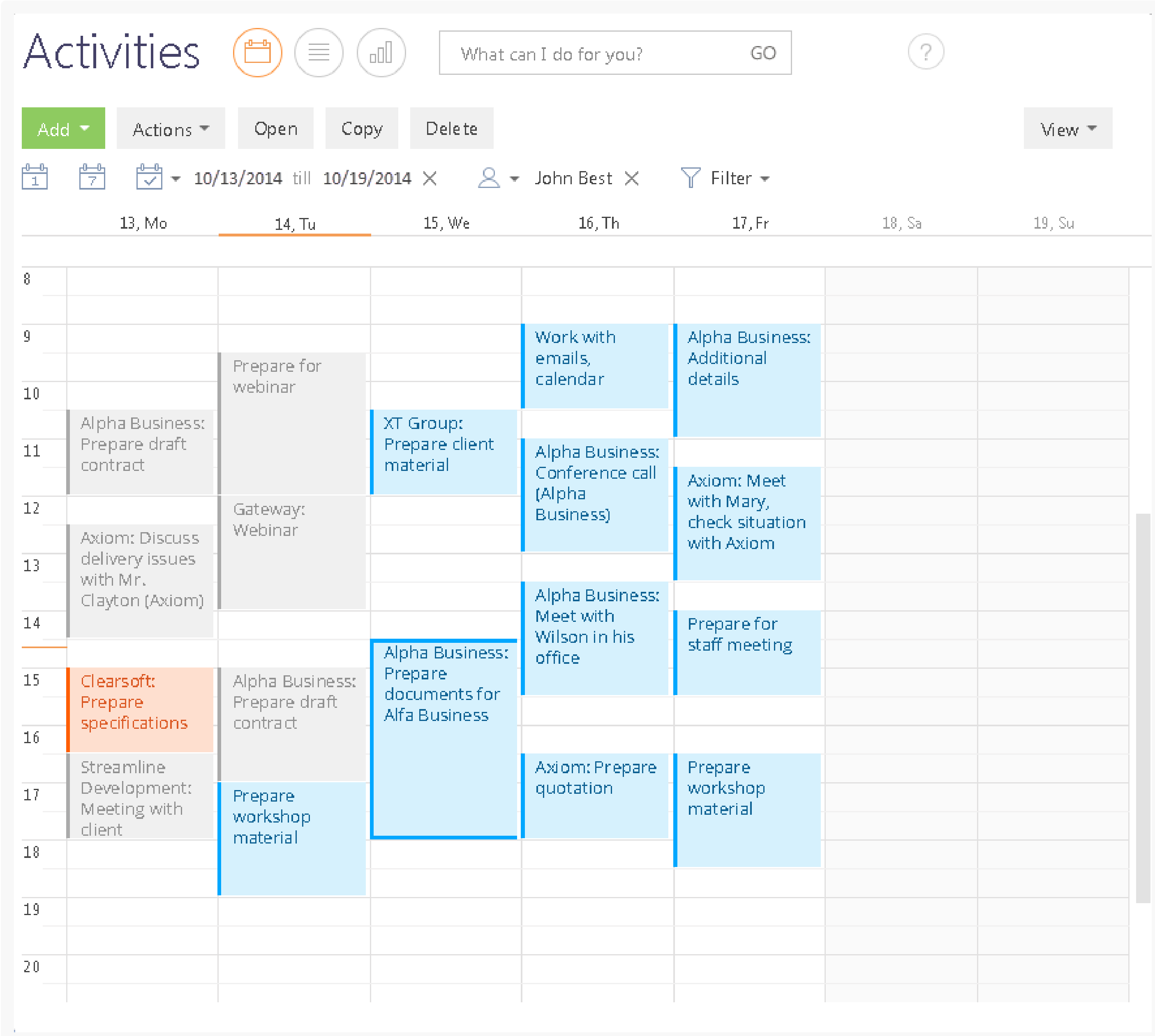
Drag the activity to the desired time in the calendar view to move the activity to another date or time. If there are several activities are scheduled for the same time, they will be displayed in the calendar view within the same period.

Work with calendar

PRODUCTS: ALL CREATIO PRODUCTS

The [*Calendar*] view of the [*Activities*] section (Fig. 1) displays activities as an electronic day planner.

Fig. 1 – [*Calendar*] view



You can add, copy, delete, as well as an open activity for viewing or editing using the toolbar buttons. When you copy an activity, the list of its participants will be copied too. Activities in the calendar can be filtered in the same manner as records in the list.

Analyze the calendar

The calendar area

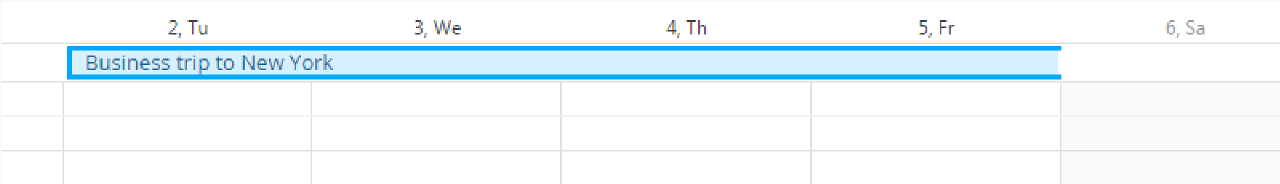
The calendar area is divided into days. The date and day of the week are displayed in the heading of each day column. The title of the current day is highlighted.

In the calendar area activities are displayed in the form of rectangular blocks whose height corresponds to the duration of activities. The current time is highlighted with an orange line. To scroll the calendar vertically, use the scrollbar at the right of the calendar or the [*Up*] and [*Down*] keys on your keyboard.

Long activities

An activity is considered as “Long“ if it lasts more than 24 hours (for example, a business trip or a vacation). Such activities are displayed above the calendar (Fig. 2).

Fig. 2 – Display of long activities in the calendar view



If the start or due date can not be specified within the time period that the calendar displays, it will display either the start date or the due date of the activity.

Activity colors in calendar view

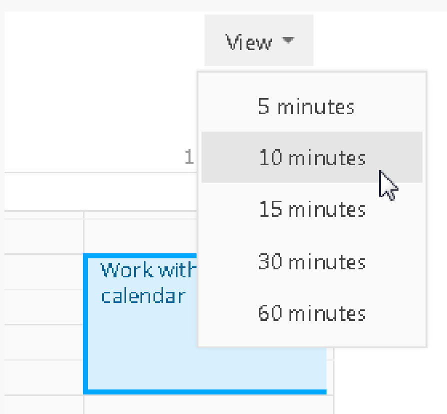
Activities in the calendar view are highlighted with different colors depending on their status and due date.

- Activities are highlighted red when their due time has already passed while those activities were not in the final state yet (overdue activities).
- Blue is used to highlight activities that are not in the final state (not started or in progress) and have not passed their due time yet.
- Grey is used to highlighting activities that are in the final state (completed or canceled).

Set up calendar scale

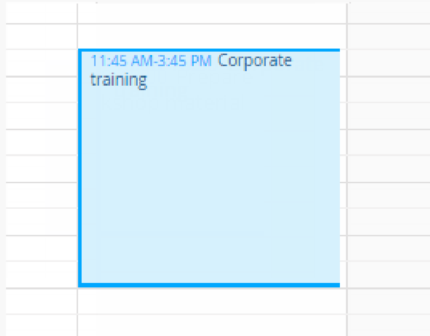
A calendar cell can display time intervals from 5 to 60 minutes. You can modify the calendar scale by selecting the corresponding command from the [*View*] menu (Fig. 3).

Fig. 3 – Changing the calendar scale



The calendar scale influences the accuracy of how activities are displayed (a calendar cell is always fully occupied). For example, if the cell is set to the interval of “60 minutes,“ the activity with 1 hour 20 minutes duration occupies 2 cells. In this case, the accurate duration of the activity is displayed (Fig. 4).

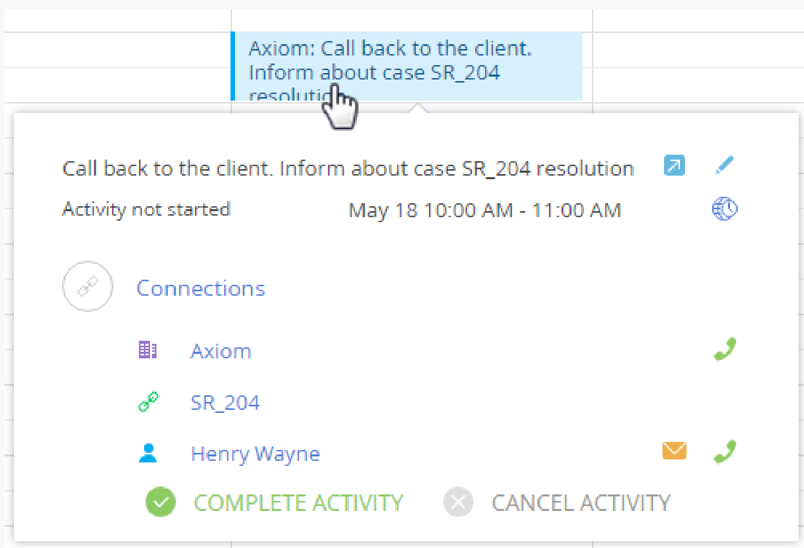
Fig. 4 – Activity start and due date in the calendar



Note. If the name of the account is available for an activity, it will display in the calendar before the activity title.

If the start and due time are not visible due to the current calendar scale, you can see them on the activity mini page that appears when the mouse pointer hovers over the activity title. Also, the activity mini page contains primary fields of the activity record (Fig. 5).

Fig. 5 – Activity mini page in the calendar view



Note. The information displayed on the mini page depends on the fields that are filled in on the activity page.