

# Activities

## Manage group activities

Version 8.0



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# Manage group activities

PRODUCTS: ALL CREATIO PRODUCTS

Creatio lets you schedule activities that have multiple participants, such as meetings, trainings, and conferences. These activities appear in the schedule of all required participants.

To make an activity a group activity, add data to the [ *Audience* ] detail. To do this:

1. Open the [ *Activities* ] section list. Select a record in the section list and click [ *Open* ].
2. Go to the [ *Participants* ] tab to specify the list of the contacts who participate in the task/call.
3. Click **+**. This opens a box. Select the needed contacts and click [ *Select* ] in the box.

Creatio adds the contacts specified in the [ *Owner* ] or [ *Reporter* ] fields to the [ *Participants* ] detail automatically.

By default, after the participants are added, the detail displays the information from the [ *Job title* ] and [ *Business phone* ] fields of the contact pages.

**Note.** When you copy an activity, the participant list is copied, too.

## Invite participants to the meeting

You can send invites to the activity participants from the activity page. View the list of participants and their responses on the [ *Participants* ] detail.

This feature becomes available after you set up integration with Exchange calendars and contacts. Learn more in a different section: [MS Exchange / Microsoft 365 email, contacts, and calendar](#).

To send invites:

1. Open the [ *Activities* ] section list.
2. Select a record in the section list and click [ *Open* ].
3. Go to the [ *Participants* ] tab and click [ *Send invitations* ] (Fig. 1).

Fig. 1 Send a meeting invitation

Active Sales workshop

What can I do for you? > **Creatio** 7.18.4.1532 VIEW

Subject\* Active Sales workshop

Start\* 10/11/2021 3:00 PM Role

Due\* 10/11/2021 5:00 PM Owner John Best

Status\* Not started Reporter\* John Best

Show in calendar  Priority\* High

Category\* Meeting

GENERAL INFORMATION PARTICIPANTS ATTACHMENTS AND NOTES EMAIL CALLS FEED

Participants + : [Send Invitation](#)

Participant	Job title	Invite response
John Best	Head of department	
Tiffany J. Martin	Specialist	
Peter Moore	Head of department	
Jason Robinson	Specialist	
Caleb Jones	CEO	
Megan Lewis	Sales associate	
William Walker	Specialist	
Symon Clarke	Marketing manager	
Mary King	Sales associate	

As a result, all activity participants that have an email address specified will receive an invite email with the meeting description and several response options:

- accept the invitation
- decline the invitation
- accept tentatively
- offer to reschedule the meeting

All sent responses will be available on the [ *Participants* ] tab of the meeting. If the participants did not respond to the invite, you can **send the invite again** by clicking [ *Resend invitations* ] on the activity page.

After the invites are sent, only the author of the activity can edit it. It will be read-only for the other participants.

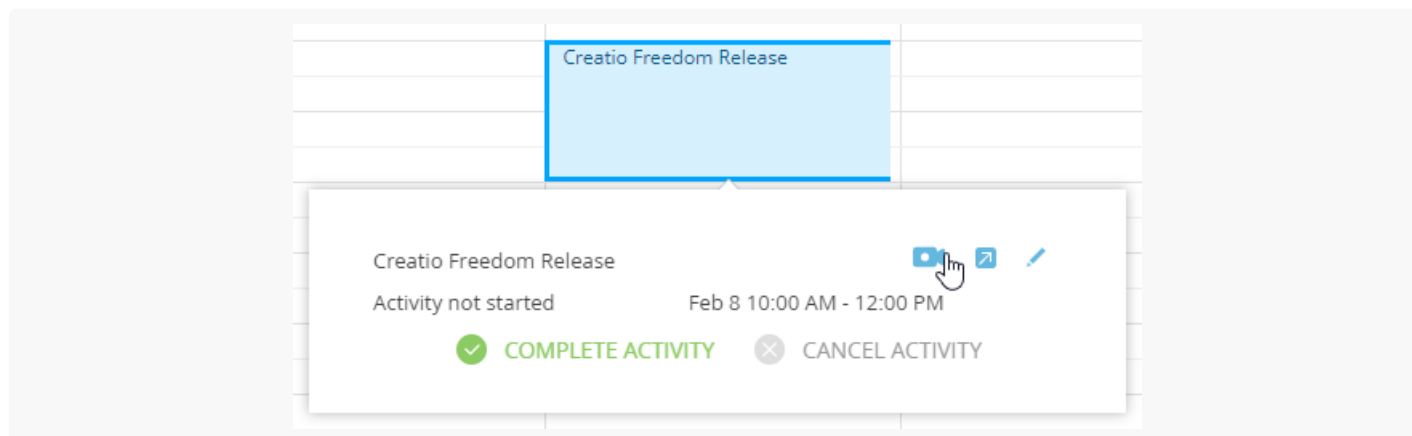
If the **key parameters** of the activity change, Creatio sends new invites automatically. The following Exchange parameters are key parameters:

- the title of the meeting (Title)
- the location of the meeting (Location)
- the start date of the meeting (Start Date)
- the due date of the meeting (Due Date)
- the priority of the meeting (PriorityID)
- the description of the meeting (Body)
- the time zone (TimeZone)
- the list of participants (Participants)

## Link an online meeting

You can connect to online meetings and video conferences in Microsoft Teams, Zoom, Cisco Webex, Join.Me, AnyMeeting, GoToMeeting, Google Meet, and other services directly from the Creatio activity calendar (Fig. 2).

Fig. 2 Join a video conference from the schedule



This feature becomes available after you set up the synchronization with Exchange calendars. Learn more in a different section: [MS Exchange / Microsoft 365 email, contacts, and calendar](#).

To link an activity to an online meeting:

1. Open an existing activity or create a new activity. Learn more in a separate article: [Create an activity](#).
2. Open the meeting edit page. For example, double-click the record heading in the [ *Activities* ] section schedule.
3. Open the [ *Attachments and notes* ] tab and add the video conference URL to the [ *Notes* ] detail.

**Note.** If you add several links to the [ *Notes* ] detail, Creatio connects to the video conference via the first link that follows the URL pattern of an online meeting service. Creatio stores URL patterns for various services in the [ *Meeting services links* ] lookup.

4. Click [ *Save* ].

As a result, Creatio will display the  button on the activity mini page and  button on the activity page. Click any button to join the scheduled online meeting

**Note.** If you add a video conference link to the activity yet Creatio will not display the buttons on the activity mini page and activity page, make sure the link is correct. The link must not contain spaces or other characters that do not follow the service URL pattern. If the link is specified correctly, contact the Creatio administrator. The [ *Meeting services links* ] lookup might lack the pattern for the service.