Activity Type

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Last Modified on 02/21/2024 10:54 am EST
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Overview

Activity Type is used to categorize various types of Activities within your company.

Properties

Activity Type, also called Base Type tells the system what type of activity is referenced. There are four base types: Task, Event, Log, Email. You can create different Activity Types for Task like Collect Payment or Send Samples. To create a record for an activity type click on the Gear icon then select Profile List under the General Section.

Grder Time			NI Orders Demo 🛛 🛛
# Home 🧳 Sales	🗮 Purchasing 👌 Production 📦 Warehouse 🚯 Reports		
Create New 👳	Admin		Ian Benoliel Thursday, October 12, 2017 Logout
Open Full List 🚽	General	Settings	Users & Roles
Recent Records	Import Profile Lists	Company Info Company Preferences	Roles Users
Test1	Doc Status	Custom Fields	Billing and Subscription
UOM TEST10	Alerts	Page Layouts	
01001B:UOM TEST11	ECommerce Integration Shipping Integration	Email Templates Form Templates	
01214A	Snipping Integration Accounting Integration	 Form templates 	

On the Profile Lists screen, select Activity Type under the General section.

Order Time							All Orders Demo
r Home 🛷 Sales	🛒 Purchasing	O ₀ ^o Production	🗑 Warehouse	🔅 Reports			
Create New 🔶	Admin > Profile Lists						
Open Full List 🔶	Profile Lists						
Recent Records	General				Sales	Repairs	
Test1	Activity Status Activity Type Item Group				Customer Types Lead Statuses Sales Tax Codes	RMA Type Warranty Type Problem Code	
01001B:UOM TEST11 01214A 9 718	Units of Measure UOM Sets Account				Item Sales Tax Payment Methods Sales Rep	Production	
 <i>∲</i> 10 <u>∲</u> 57 	Manufacturers Class				Discount Custom Messages	Steps Production Center	
129 48	Currencies FOB Terms				Price Levels Payment Gateway	Shipping	
	Ferms Employee & Other Vendor Types Attribute	Names				Ship Method Package Type Shipping Carrier Account	
	Attribute User Group						

On the Activity Type screen, you can enter a Name for your new activity and categorize as an Event, Task or Log. If needed enter a Subject for your Activity. The subject will auto default every time you select this activity.

You can create as many Activities as your business requires, these can be activated or inactive as you see fit. If you need to be reminded or keep track of specific function within your organization an Activity type can be a useful tool.

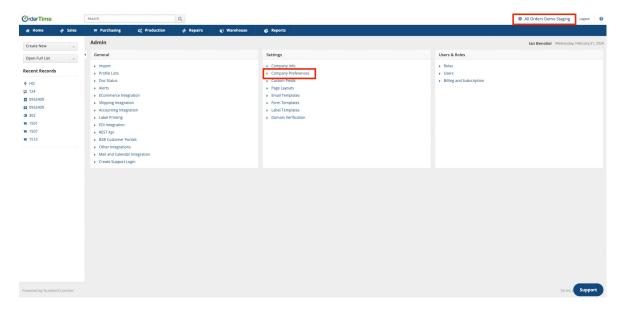
Click on **Save** when done.

Order Time								O Al
🖷 Home	🛷 Sales	🗮 Purchasing	O ^o Production	🗑 Warehouse	Reports			
Admin > Profile	Lists + Activity Typ	be						
Activity Typ	e							
Active Status								
Active	Inactive 🔘 Both	Ne	Monthly Vendor N	feeting				
Records			ype Event		*			
			ject Auto Parts Deliver	у				
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Event		0						
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Log		0						
Meeting		0						
Task		0						
		0						

Color Coding a Calendar Event

If you would like to color code the Events on your home screen calendar follow the steps below.

In order to start color coding a calendar event first go to admin by clicking the company name in to top right corner and then company preferences.



From there, click **Activities** and select the "**Use activity as colors for the calendar**" check box and then hit **save**.

Admin > Company Preferences	
Company Preferences	Save
Section	Activities
General	Enable calendar events
Activities	Add due date days 0 t
Doc #s	Send Email On Create
Items	Send SMS On Create
Inventory	Set Alarm On Create
Sales	😢 Use activity type as colors for calendar
Shipping	When sending emails
Payments	When Order Time sends external emails for Alerts or B2B Orders, use the current user's email and name. Uncheck to use the "Default from Email" in Company Info.
Purchasing	When you create an email from Order Time, add the option to select the Company Email or Default Company Email as the 'From' email.
Receiving	
Production	
Lot / Serial #s	
Repair Orders	
Rentals	
Mobile	
Mail and Calendar Integration	

To choose the color for events in Order Time, follow these steps:

- Click on your company name in the top right corner of the Order Time screen.
- Select "**Profile List**" under the General section.
- Choose "Activity Type"

From there you can assign colors to the Event-type activities of your choosing.

Hit **save** in the top right once you finished.

Note: The only activity types available for color coding are Events

👿 Purchasir Type	ng OC Production	A Repairs	Warehouse	😩 Reports	
Туре					
oth	Name production dead	dlines			
	Type Event			~	
	Color 📕 🔻				
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		Type Cent 0 Color V 0 Subject Color 0 Active Z 0 Color V 0 Color V	Type Event Calor I Calor I Subject I Active I O<	Type Event Control Subject Control Sub	Type Letter Composition Letter Subject Letter Composition Letter

Now that you have followed these steps the events you chose to color code should be easily identifiable and look something like this on the dashboard.

OrderTime	Search	Q				All Orders Demo	o Staging Logout
# Home 🧳 Sales	₩ Purchasing 0° Pro	oduction 🧳 Repairs	🗑 Warehouse 🛛 🔮 Reports				
Create New 🗸	Home					Ian Benoliel	Wednesday, February 21, 2
Open Full List 🗸	*						O Add Even
ecent Records	< > 🗎			Feb 18 – 24, 2024			
HQ	SUN 2/1	8 MON 2/1	9 TUE 2/2	0 WED 2/21	THU 2/22	FRI 2/23	SAT 2/24
124	all-day						
0932409	8am		8:00 - 10:30 Floor Cleaning				
0932409	9am						
362							
1501	10am		-				
1507	11am			11:30 - 3:00			
1513	12pm			ProjectAssembly			
	1pm				1.00 - 2.50 Monthly Meeting		
	2pm						
	3pm						
	4pm						
	Spm						
	6pm						
	opm						
	Open Tasks						
	open read						
	Today + Overdue	~					Add Tasl
	TYPE SUBJECT		DUE DATE	DESCRIPTION	RELATED TO ENTITY NAME	PRIORITY	r ACTIONS
	Task Alert Sales Order F	Ready to Ship I-SO# 10039	2/2/2023 02:39 PM		1496 Ontario Inc.	Normal	8
	Task follow up		2/8/2023 08:00 AM		18J Packaging, LLC	Normal	
	Task Alert PO Follow up	I-PO# 10001669	4/24/2023 10:31 AM		080613J&R Plastics	Normal	Suppor

For more information regarding events please see: <u>Managing Events and Tasks from a Details</u> <u>Page</u>