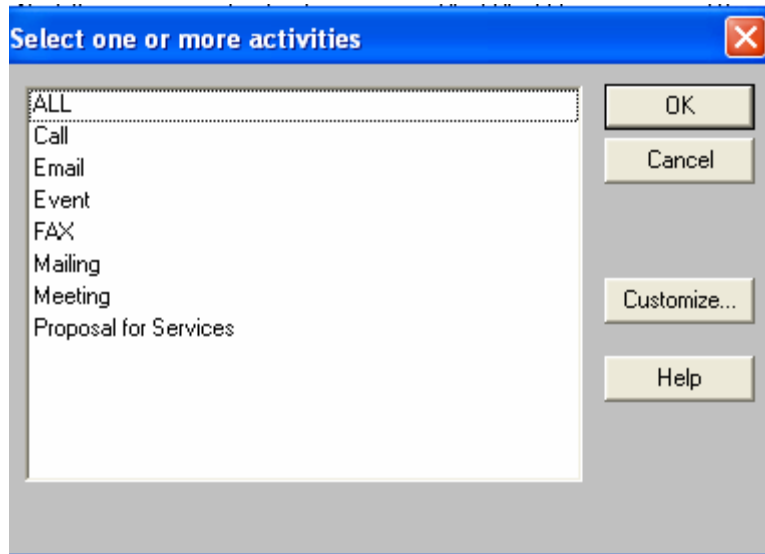


Creating and Using Activity Templates

What is an Activity Template?

When you record an Activity, you are asked to select an activity template. This template contains the fields and options for the type of activity you are recording.



The template selected will offer fields for this type of activity; as well as default values for each field presented.

Activities are then tracked under the Activity tab in the Record View section.



Creating and Using Activity Templates

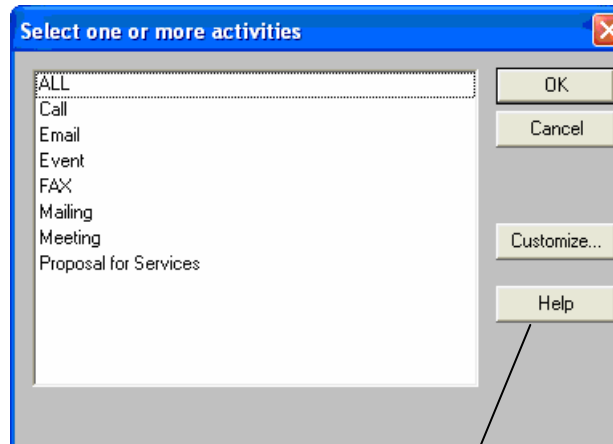
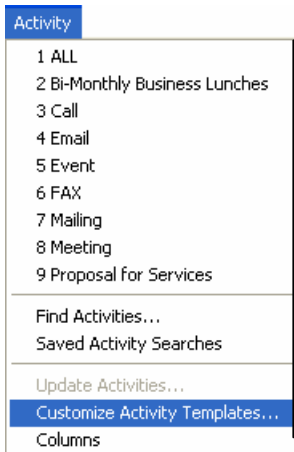
These are potential fields that can be included in an activity template.

The screenshot shows a configuration window for an activity template. The title bar reads 'ALL'. The fields are as follows:

- Type: Letter
- Assign to: Attorney
- Priority: Normal
- Status: Completed
- Start: 6 /21/2007, Time: 8 :00 AM
- Due: 6 /21/2007, Time: 8 :00 AM
- Completed: 6 /21/2007, Time: 8 :00 AM
- Reminder: 6 /21/2007, Time: 7 :02 PM
- Subject: Announcement
- Note: 2007 Civic Award from Chicago.

How do I Customize the Activity Template?

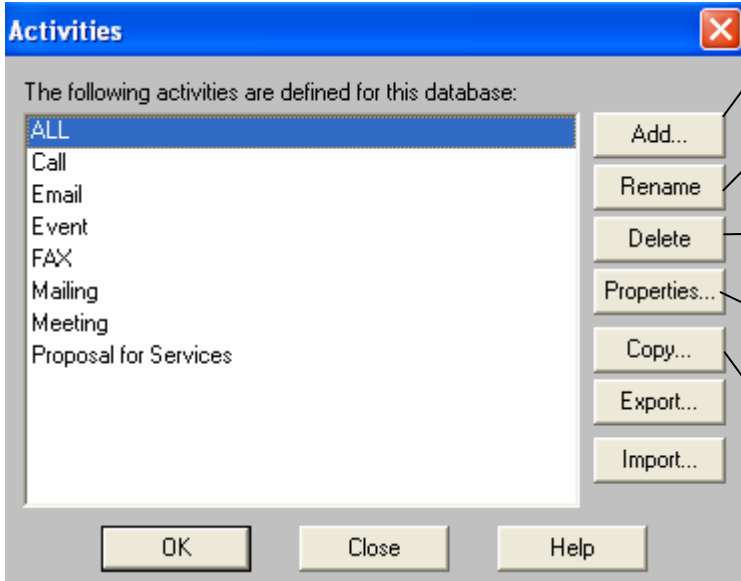
1) Go to the Activity menu, and select “Customizing Activity Templates”.



2) Click on the *Customize* button.

Creating and Using Activity Templates

Activity Options



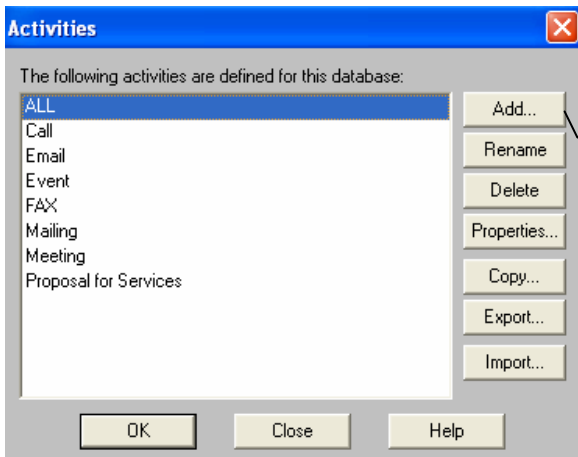
Click *Add* to create a new template.

Click *Rename* to change the template title.

Click *Delete* to remove a saved template.

Click *Properties* to change the options of a template.

Click *Copy* to make a duplicate of an existing template.



3) Click the *Add* button to create a new template, or highlight an existing one and click *Properties* to edit it.

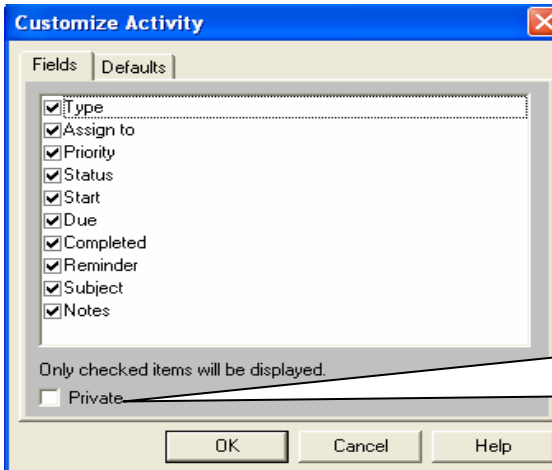
4) Enter the desired name of the new activity template in the *Add Activity* window; and click *OK*.



Creating and Using Activity Templates

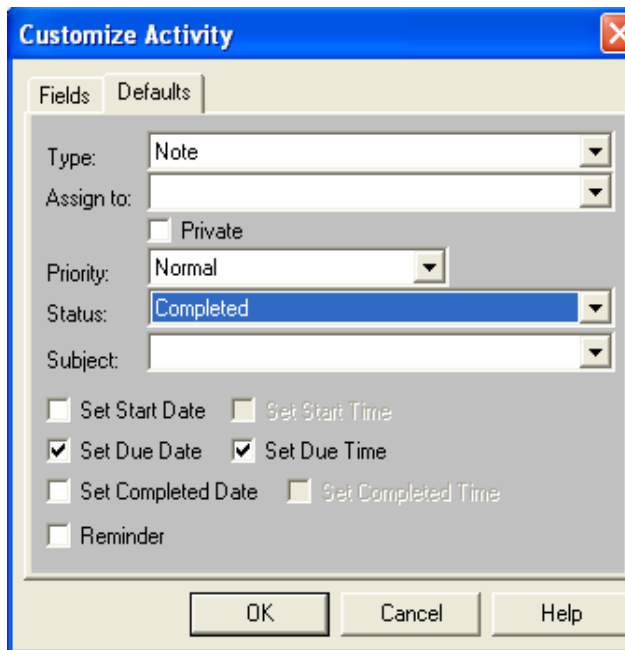
Customize Activity Window

The Customize Activity window consists of two tabs: Fields and Defaults. The Fields tab allows users to select which fields are displayed for an activity. The Defaults tab allows users to pre-assign values to those fields.



5) Choose the fields that will appear on the template. Only the checked fields will be displayed and can be used when creating this activity. Click *OK* after making selections.

Note: If you check *Private*, then only you (your user ID) can use this template. It will not appear on the list of available activity templates for other users.



6) Select the defaults that you wish to use for this activity template. The subject's default is the name of the activity template (This can be modified).

When creating an activity, you can always override the defaults. Defaults are created to help the process of input by pre-selecting the most popular options.

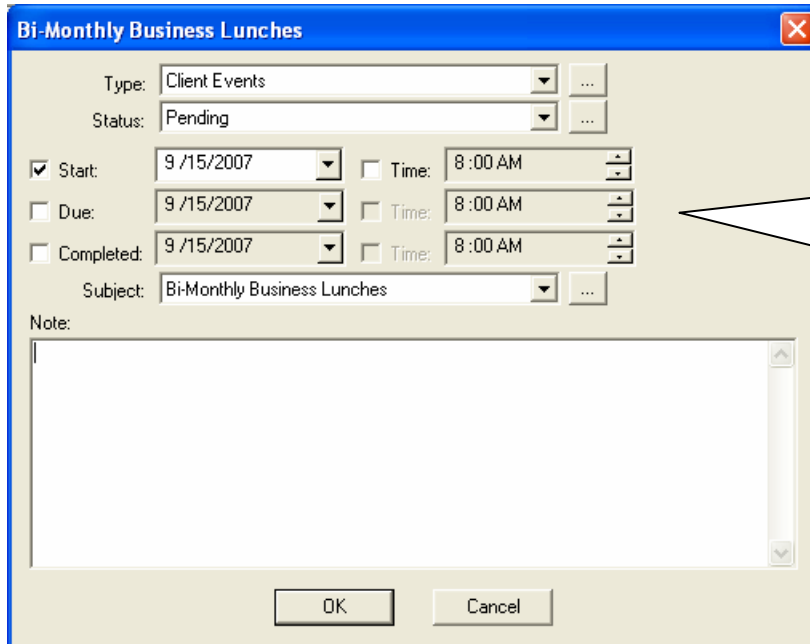
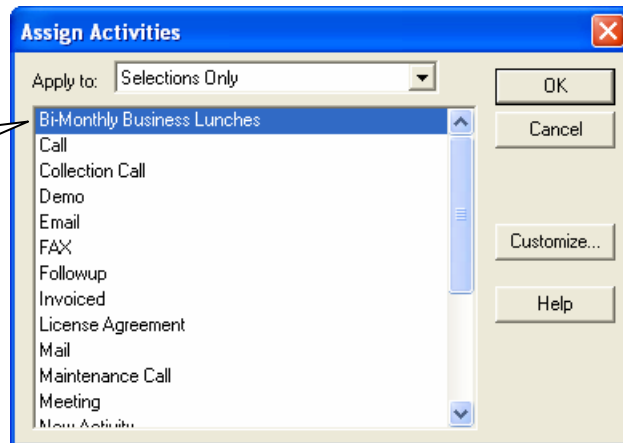
Choosing the *Set Date* options (Start/Due) will automatically assign the present date. If a user selects a *Set Date*, the *Set Due Time* option becomes available.

Creating and Using Activity Templates

Recording an Activity Using A Template

You will be asked to select an activity template when recording an activity. This will make entering the activity easier since the values are pre-selected.

Highlight the desired template, and click OK (Note: Users can also double-click the newly added template title)



Note that only the selected fields are present and any pre-assigned values are already in place. You can make further modifications to this entry and/or click OK to post this activity.

END OF HINT!