

Activities - Follow-Up and Template

The Activity Follow-Up screen allows the user to quickly create several follow-up activities in a single screen. Here's how to create follow-up activities:

- 1. Open an existing Event/Task/Call record.
- 2. Click the **Follow-Up** button to open the **Activity Follow-Up** screen
- 3. Select a Template or create one by clicking on label hyperlink to open the **Activity Follow-Up Template** screen
 - a. Enter the Template Name
 - b. On the grid, select the Type, Subject, Category, Priority, Status, Details
 - c. **Save and close**

Activity Follow-Up Template

NewSaveDeleteClose

Details

Template Name *Temp 01

Follow-Up Activities

X InsertX RemoveExportViewFilter (F3)

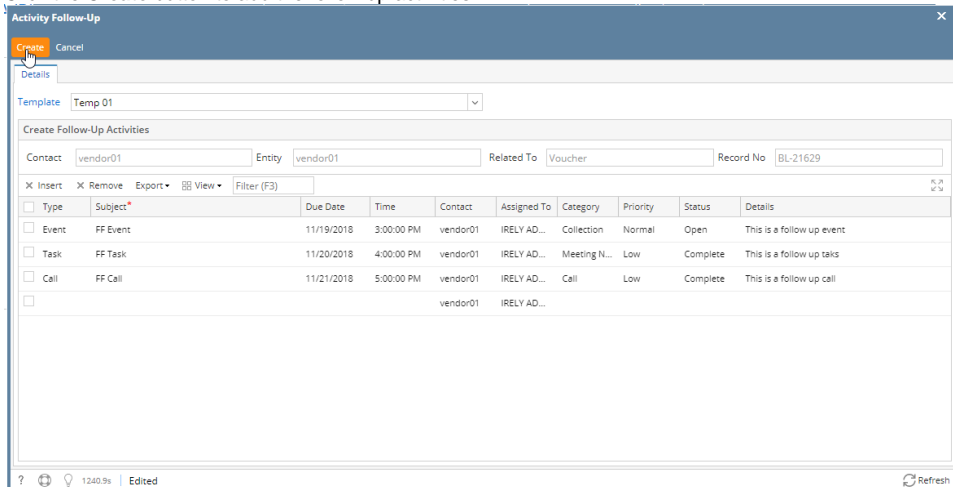
Type	Subject *	Assigned To	Category	Priority	Status	Details
<input type="checkbox"/> Event	FF Event	IRELY AD...	Collection	Normal	Open	This is a follow up event
<input type="checkbox"/> Task	FF Task	IRELY AD...	Meeting N...	Low	Complete	This is a follow up taks
<input type="checkbox"/> Call	FF Call	IRELY AD...	Call	Low	Complete	This is a follow up call
<input type="checkbox"/>		IRELY AD...				

0.8s | Edited

1 of 1Refresh

- 4. Add the **Due Date and Time**

5. Click the **Create** button to add the follow up activities



Activity Follow-Up

Create Cancel

Details

Template Temp 01

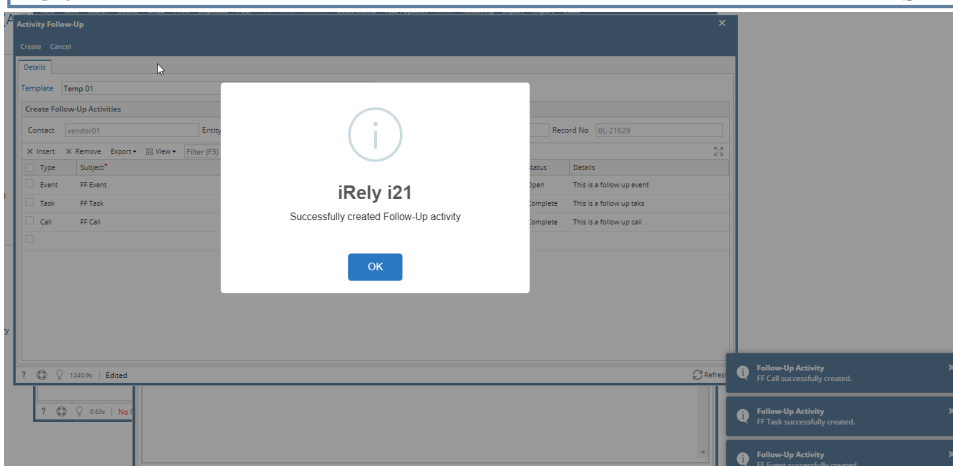
Create Follow-Up Activities

Contact vendor01 Entity vendor01 Related To Voucher Record No BL-21629

X Insert X Remove Export View Filter (F3)

Type	Subject	Due Date	Time	Contact	Assigned To	Category	Priority	Status	Details
<input type="checkbox"/> Event	FF Event	11/19/2018	3:00:00 PM	vendor01	IRELY AD...	Collection	Normal	Open	This is a follow up event
<input type="checkbox"/> Task	FF Task	11/20/2018	4:00:00 PM	vendor01	IRELY AD...	Meeting N...	Low	Complete	This is a follow up taks
<input type="checkbox"/> Call	FF Call	11/21/2018	5:00:00 PM	vendor01	IRELY AD...	Call	Low	Complete	This is a follow up call
<input type="checkbox"/>				vendor01	IRELY AD...				

12:03:56 Edited Refresh



Activity Follow-Up

Create Cancel

Details

Template Temp 01

Create Follow-Up Activities

Contact vendor01 Entity vendor01 Related To Voucher Record No BL-21629

X Insert X Remove Export View Filter (F3)

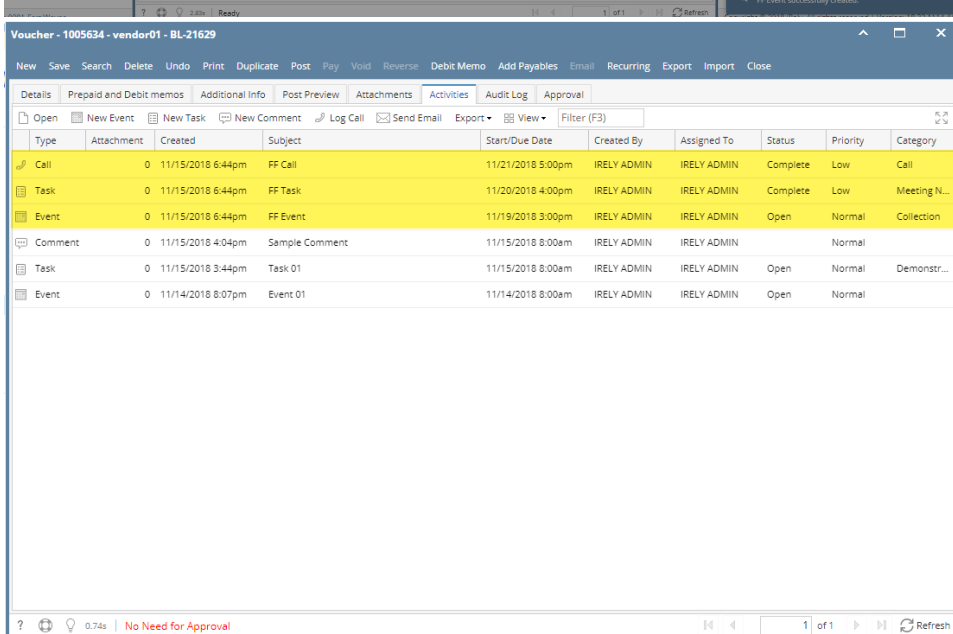
Type	Subject	Due Date	Time	Contact	Assigned To	Category	Priority	Status	Details
<input type="checkbox"/> Event	FF Event	11/19/2018	3:00:00 PM	vendor01	IRELY AD...	Collection	Normal	Open	This is a follow up event
<input type="checkbox"/> Task	FF Task	11/20/2018	4:00:00 PM	vendor01	IRELY AD...	Meeting N...	Low	Complete	This is a follow up taks
<input type="checkbox"/> Call	FF Call	11/21/2018	5:00:00 PM	vendor01	IRELY AD...	Call	Low	Complete	This is a follow up call
<input type="checkbox"/>				vendor01	IRELY AD...				

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Follow-Up Activity
FF Call successfully created.

Follow-Up Activity
FF Task successfully created.

Follow-Up Activity
FF Event successfully created.



Voucher - 1005634 - vendor01 - BL-21629

New Save Search Delete Undo Print Duplicate Post Pay Void Reverse Debit Memo Add Payables Email Recurring Export Import Close

Details Prepaid and Debit memos Additional Info Post Preview Attachments Activities Audit Log Approval

Open New Event New Task New Comment Log Call Send Email Export View Filter (F3)

Type	Attachment	Created	Subject	Start/Due Date	Created By	Assigned To	Status	Priority	Category
<input checked="" type="checkbox"/> Call	0	11/15/2018 6:44pm	FF Call	11/21/2018 5:00pm	IRELY ADMIN	IRELY ADMIN	Complete	Low	Call
<input checked="" type="checkbox"/> Task	0	11/15/2018 6:44pm	FF Task	11/20/2018 4:00pm	IRELY ADMIN	IRELY ADMIN	Complete	Low	Meeting N...
<input checked="" type="checkbox"/> Event	0	11/15/2018 6:44pm	FF Event	11/19/2018 3:00pm	IRELY ADMIN	IRELY ADMIN	Open	Normal	Collection
<input type="checkbox"/> Comment	0	11/15/2018 4:04pm	Sample Comment	11/15/2018 8:00am	IRELY ADMIN	IRELY ADMIN	Normal		
<input type="checkbox"/> Task	0	11/15/2018 3:44pm	Task 01	11/15/2018 8:00am	IRELY ADMIN	IRELY ADMIN	Open	Normal	Demonstr...
<input type="checkbox"/> Event	0	11/14/2018 8:07pm	Event 01	11/14/2018 8:00am	IRELY ADMIN	IRELY ADMIN	Open	Normal	

0.74s No Need for Approval 1 of 1 Refresh