


Activity Planner

TempWorks Software has a built-in Activity Planner, which is integrated with other areas of the database.

The Activity Planner can assist everyone from the Coordinator to the Sales Person to the CEO of your company.

Where applicable, activities may be linked to Employees, Contacts and/or Orders.

 Activities do not have to be linked to anything. For example, if you would like to schedule personal activities you may not be linking those to anything.

Access the Activity Planner by pressing **F12** or by clicking the Activity button from the Workflow toolbar.



	Activity	Party Responsible	Emp/Appl	Contact	Customer	Date Due	✓	Phone#	Comment
	Message	dwood	Gallagher, Matt	Bradley, Craig	Lawnwood H	10/06/04	<input type="checkbox"/>	(651) 121-1414x	Having lunch again at RJ Gators w
	Message	dwood	Marshall, Mathe	Wood, Dalyce	Dalyce, Inc.	10/06/04	<input type="checkbox"/>	(561) 345-3524x3	Check to see how he is feeling, hi
	Message	dwood		Larson, Brenda	Brenda Comp	10/06/04	<input type="checkbox"/>	(345) 324-6324x63	Send letter one to group

The Activity Planner will open to today's date, but any date range can be viewed.

The planner will display vital information regarding each Activity.

Adding an Activity

There are two ways to add an activity to the Activity Planner, through Messages and through the Add Activity.


Adding an Activity through logging a message

The Messages and Activities are closely related in that any Message can be turned into an Activity.

A Message can be added to your Activity Planner by adding a Due Date.

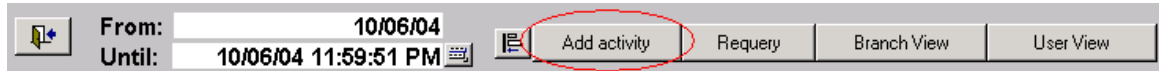
Date/Time	Action	Customer	RepName	Inv#	ChkId#	OrderId#	DocId#	
10/06/04 10:09:00 AM	Training		dwood					
Employee:	Guernsey, Robert	E		09:00 coming in to go through the Access Training Class				
Contact:		C						
Due:	10/11/04	Cmp:	A					
OrderId:		Aident:	5124					


Once you have logged your Message and linked it to the appropriate areas, click your mouse in the **Due Date** field and type in the date on which you would like it to appear in your Activity Planner.

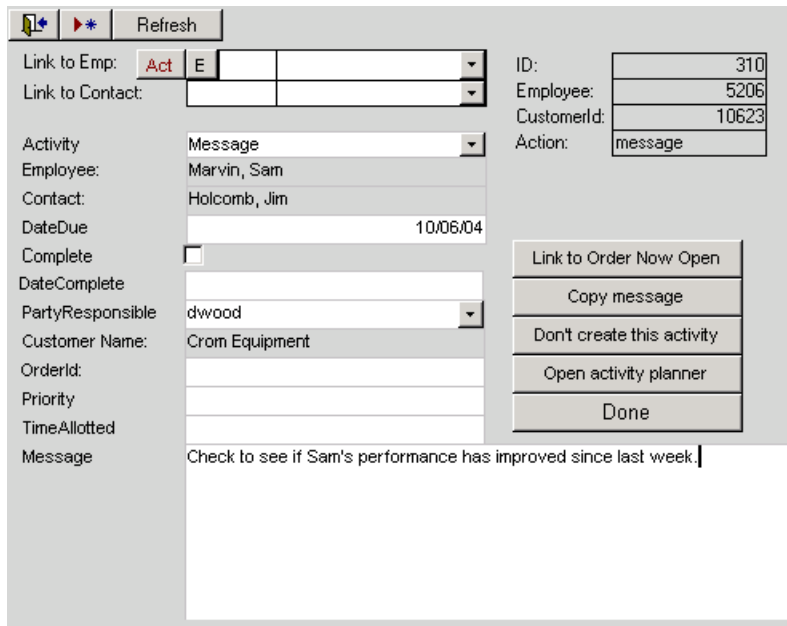
 When scheduling an Activity using this method, you do not have the option to assign the Activity to another party, Prioritize the Activity or give it a Time Allotment. You can, however, use the edit button within the Activity Planner to make any necessary changes.

Adding an Activity through the Add Activity

To open the Activity Add Anything form from the Activity Planner, click the Add Activity button.




 **Ctrl-Y** will open the Activity Add Anything form from anywhere within TempWorks.

A screenshot of a web-based form titled 'Activity Add Anything'. The form is divided into several sections. On the left, there are fields for 'Link to Emp:' (with a dropdown showing 'Act E'), 'Link to Contact:', 'Activity' (dropdown showing 'Message'), 'Employee:' (text field 'Marvin, Sam'), 'Contact:' (text field 'Holcomb, Jim'), 'DateDue' (text field '10/06/04'), 'Complete' (checkbox), 'DateComplete', 'PartyResponsible' (dropdown showing 'dwood'), 'Customer Name:' (text field 'Crom Equipment'), 'Orderid:', 'Priority', 'TimeAllotted', and 'Message' (text area with content 'Check to see if Sam's performance has improved since last week'). On the right, there are fields for 'ID:' (310), 'Employee:' (5206), 'CustomerId:' (10623), and 'Action:' (message). Below these fields are five buttons: 'Link to Order Now Open', 'Copy message', 'Don't create this activity', 'Open activity planner', and 'Done'.


Select the appropriate **Activity** type from the activity drop down list.

Edit or Enter **Date Due**.

Select the **Party Responsible** for the activity.

 The user login will default.

If desired, enter a **Priority**.

 The list of Activities can be sorted by priority.

If desired, enter a **Time Allotted**.

Finally, enter the Activity **Message**.

Once complete, click the **Done button** to add this Activity to your Activity Planner.



The information added as an Activity will show in the message area of all linked records; employee, contact and order.

Editing and Copying Activities

Within the Activity Planner, Activities can be edited or copied as needed.

		From:	10/06/04									
		Until:	10/06/04 11:59:51 PM		Add activity		Requery		Branch View		User View	
		Activity	Party Responsible	Emp/Appl	Contact	Customer	Date Due	<input checked="" type="checkbox"/>	Phone#	Comment		
		Message	dwood	Gallagher, Matt	Bradley, Craig	Lawnwood H	10/06/04	<input type="checkbox"/>	(651) 121-1414x	Having lunch again at RJ Gators w		
		Message	dwood	Marshall, Mathe	Wood, Dalyce	Dalyce, Inc.	10/06/04	<input type="checkbox"/>	(561) 345-3524x3	Check to see how he is feeling, h		

There are two buttons to the left of each Activity.

Edit button



To change any information on an existing Activity, click the edit button. The Activity Add Anything form will open. Make any necessary changes then click the Done button.

Copy button



To copy an existing Activity, click the copy button. The Activity Add Anything form will open to display the new copy. Make any necessary changes then click the Done button. Your new copy has been made leaving the old Activity in the original format.

Navigating using the Activity Planner

Navigation is easy within the Activity Planner.

Message	dwood	Gallagher, Matt	Bradley, Craig	Lawnwood H	10/06/04	<input type="checkbox"/>	(651) 121-1414x	Having lunch again at RJ Gators w
Message	dwood	Marshall, Mathe	Wood, Dalyce	Dalyce, Inc.	10/06/04	<input type="checkbox"/>	(561) 345-3524x3	Check to see how he is feeling, h

If an Activity is linked to an Employee, Contact, Customer or Order you can navigate to any of those records by double-clicking directly on the name of that record.

Completing an Activity

Once an Activity has been completed, it can be indicated on the Activity by clicking the **Check Box**.

		From:	10/06/04									
		Until:	10/06/04 11:59:51 PM		Add activity		Requery		Branch View		User View	
		Activity	Party Responsible	Emp/Appl	Contact	Customer	Date Due	<input checked="" type="checkbox"/>	Phone#	Comment		
		Message	dwood	Gallagher, Matt	Bradley, Craig	Lawnwood H	10/06/04	<input checked="" type="checkbox"/>	(651) 121-1414x	Having lunch again at RJ Gators w		
		Message	dwood	Marshall, Mathe	Wood, Dalyce	Dalyce, Inc.	10/06/04	<input checked="" type="checkbox"/>	(561) 345-3524x3	Check to see how he is feeling, h		

If the Activity is not completed on the day it is scheduled, that Activity will show each day on your Activity Planner until you complete it.

How the Activity information relates to the Message

Information from the Activity Planner is displayed as a Message within each individual record.

Visifile Sub Tab

Date	Action	Message	Rep	Contact	Customer	Due	Done?
A 06/02/03	P Lunch	Having lunch again at RJ Gators with Matt Gallagher going v	dwood	Bradley, Craig	Lawnwood Ho	02/23/04	<input checked="" type="checkbox"/>
A 06/02/03	P Lunch	Having lunch again at RJ Gators with Matt Gallagher going v	dwood	Bradley, Craig	Lawnwood Ho	10/06/04	<input checked="" type="checkbox"/>

Within the Message area of the Visifile, the Due Date and Complete check box are displayed. Also available is a **navigational button "A,"** which, when clicked, will navigate you to that specific Activity within the Activity Planner.

Message Sub Tab

Date/Time	Action	Customer	RepName	Inv#	ChkId#	OrderId#	DocId#	
06/02/03 4:26:00 PM	P Lunch	Lawnwood Hospital	dwood					
Employee:	Gallagher, Matt E	E	<input checked="" type="checkbox"/>	Having lunch again at RJ Gators with Matt Gallagher going with				<input checked="" type="checkbox"/>
Contact:	Bradley, Craig	C	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>
Due:	02/23/04	Cmp:	02/23/04	A	<input checked="" type="checkbox"/>			
OrderId:		Aident:	5113					<input checked="" type="checkbox"/>

Within the Message Sub Tab the Due Date, Complete Date and Complete check box are displayed. Also available is a navigational button "A," which will navigate you to that specific Activity within the Activity Planner when clicked.