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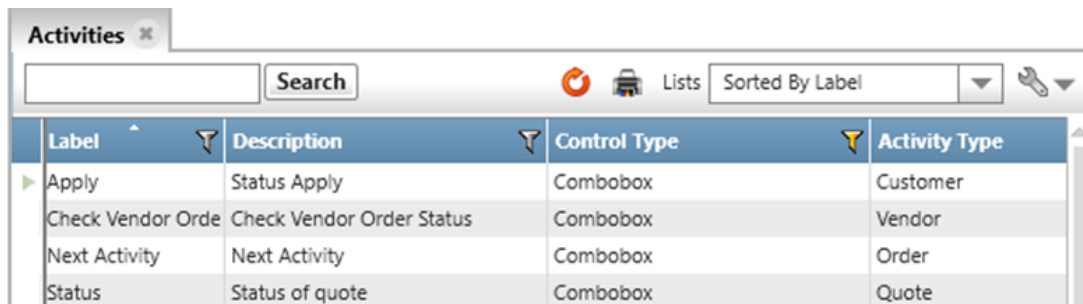
Tammy Mason - 2022-07-20 - in Quotes, Orders & Invoices

How Do You Create Activities?

Activity Types are Customer, Vendor, Quote, and Order. Customer Type activities are associated with the customer listed on an order. Vendor Type activities are associated with the vendors assigned on the products within the order.

Quote and Order Type activities are associated to the Order number assigned. To create an Activity, select that option under the Order tab, Tracking Group and select Activity to open the Activity Manager.

Decide what Activities you would like to track for your company. Click **New** to add an Activity; then follow the steps 1 - 4 below.



The screenshot shows the 'Activities' manager interface. At the top, there is a search bar and a 'Search' button. To the right, there are icons for refresh, print, and lists, along with a 'Sorted By Label' dropdown menu. Below this is a table with four columns: Label, Description, Control Type, and Activity Type. The table contains four rows of activity data.

Label	Description	Control Type	Activity Type
Apply	Status Apply	Combobox	Customer
Check Vendor Orde	Check Vendor Order Status	Combobox	Vendor
Next Activity	Next Activity	Combobox	Order
Status	Status of quote	Combobox	Quote

1. **Activity Type:** Select the Activity Type: Customer, Order, or Vendor from the drop-down menu.
2. **Control Type:** Select the Control Type, which can be either a Checkbox, Combobox, Date or Textbox, to define the method used to update this Activity. (You will need to add Activity Options when you use comboboxes to match the Activity.
3. **Label:** Enter a Label name for the column header, which you will see in the Order Tracking View.
4. **Description:** The Description defines what this Activity

represents. When using the list tool, you will see the column header (Label) as well as this Description for the column.