Efficiency

Activity Management

Version 4.6

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Activity Management Module – Set up

Overview

Executives (employees) perform 'The business' in the organisation by conducting many internal and external activities.

The customer contacts, quotations, recording orders, or lost sales, maintaining high levels of customer support, membership renewals, targeting large market sectors by telemarketing or mail marketing, e-commerce are some of the many sales, marketing and customer service activities as examples to the external activities. Sales meetings, training courses and seminars, board meeting etc are examples to internal activities.

EFFICIENCY Activity Manager is the 'heart' of the entire total business and client management. It is exceptional design features and full integration to all the modules of EFFICIENCY makes the activity manager as the 'main engine' in the system.

Activity manager creates and manages activity transactions. An activity transaction is best described as the 'foot print' of the entire business relations, external and internal, that relate to that activity. Each activity transaction belongs to one or more executives, customers and contacts and stamped with dates, times and alarms and includes any other information that relate to the activity, such letters, documents etc.

The activity transactions are the source of any historical or future (scheduled or task) information for any one its elements. You can access to any imaginable information from a single activity, past or future, by a click of a button. The activity manager adds the management values to the activity as it is created and followed up. These are the basic ingredients of how an event is usually defined by selecting the appropriate answers to the

- Why
- When
- What
- Who
- Whom
- Where - questions all of which start with 'W' (we refer them as 'The Big Ws')

'The Big W' values are either defined by the users to suit the needs of the organisation, business or reporting and by selecting the related information from the database.

For example the 'Why' question can be tabulated in the Reason Category and Reason Item tables by creating the Reason Codes. Similarly the 'Whom' question can be answered by selecting the related Company, Site and contact information from the database.

First Steps

Before using Activity Management Module, ensure these Efficiency areas are set up:

- Supervisor
- Operating Divisions
- Branches
- Warehouses
- Executives
- Security
- Users
- Functional Security
- User and Shared Options

Modules

- Companies and Contacts
- Campaigns

Activities Codes and Flags

Now you can set up the Activity Management Specific codes and Flags, further explained in full detail within this manual. For any other set-up required, please refer to the relevant manual.

The following code and flag tables should be set up during the initial set up. Each table requires at least one record. The system will provide a default record of

Code: 00000

Description: Default record of

It is recommended to keep at least one default record in each table.

These tables (listed with their descriptive names, the database names are given on the detailed section for each item) are grouped in three categories. Some of the data in the tables relate to the whole corporation and some may be maintained at the operating division levels.

- Mandatory/Strongly Recommended
- Optional
- Site Specific

Mandatory or Strongly Recommended

Activity Reason	Corporate Level
Activity Result	Corporate Level
Activity Status	Corporate Level
Activity Type	Corporate Level
Next Action	Corporate Level
Activity Class	Corporate Level
Activity Defaults	Corporate Level
Workflow Type	Corporate Level
Shared Options	Corporate Level
User Options	User Level

Optional i.e. Default value may be used

Activity Profile Group	Corporate Level
Activity Profile Item	Corporate Level
To Do Type	Corporate Level
To Do Category	Corporate Level
To Do Status	Corporate Level

Codes and Flags

Activity Reason

When an Activity Transaction is initiated between the Executive and the Contact there is always a reason for it. This reason usually becomes the definition of the Activity Transaction, i.e. Telemarketing, Quotation, Order, Cold Call, Follow Up etc.

The Activity Reason and the Next Call Action codes are very similar in their concept and definitions. In fact, usually they are interchangeable.

A well designed Activity Reason Code structure allows the Supervisor can group and analyse all the Activity Transactions and Activities in a very meaningful and useful fashion

Activity Reason Tables and Fields

The Activity Reason codes are maintained in the Activity Reason Code Table (callrsn) i.e. Follow Up Quotation, Demonstration, Inbound Telemarketing, etc. The data in this table is usually reflects each Operating Division requirements.These codes are grouped in the Activity Reason Category Table (callrsn). The data in this table should be designed to address the needs of the entire corporation.

Activity Reason Category fields in table CALLRSNC

Field Name	Field Description
Category Id	A unique identification code.
Description	The description of the activity reason category

Activity Reason Code fields in table CALLRSN

Field Name	Field Description
Reason Id	A unique identification code for the activity reason
Description	The description of the call reason
Activity Reason Category	A unique identification code for the activity reason category

The data in the Activity Reason Category Table must exist before entering data in the Activity Reason Code Table.

Activity Reason Hints and Tips

- The Activity Reason IDs should be created manually.
- If you are using the automatic <Follow Up> creation function of the call transaction maintenance, then it is necessary to ensure that the codes in the Next Call tables are also available in the Activity Reason tables.
- Each Table must contain at least one record.
- Default records with the IDs of ‘00000’ are recommended.

Activity Reason Data Example

Activity Reason Category Codes

Category Id	Description
00000	*Default Call Reason Category*
NOTE	Notes entry
MAINT	Maintenance
HELP	Help Desk
SUPP	Support
SERV	Service
OR	Orders
QT	Quotations
MM	Mail marketing
TM	Tele marketing
CALL	Cold Call
TRAIN	Training

Activity Reason Codes

Category Id	Reason Id	Description
00000	*00000*	*Default Call Reason*
CALL	FC	Follow Up Call

CALL	CC	Cold Call
MM	MM	Mail Marketing
QT	QT	Quote
SETC	SERV	Service
SUPP	SUPP	Support
TM	TM	Telemarketing
TRAIN	TRAIN	Training

Key

Abc: These are the typical recommended records.
Abc: These are the mandatory or system dependant records.

Activity Result

When an Activity Transaction is performed between the Executive and the Contact **system must register an Activity Result** for the current activity, i.e. Interested, Call Later, Not Interested, and Demonstration Arranged etc.

The Next Activity Action code usually complements the meaning of the Activity Result code in a activity transaction.

The Budget and History or **Score Card** values may be generated from the occurrences of the selected Activity Result Codes of the activity transactions.

A well-designed Activity Result Category and Code values will enable the users to obtain the History, Result, Performance and Analysis values for any activities of the corporation.

Activity Result Tables and Fields

The Activity Result codes are maintained in the Activity Result Code Table (callrslt) i.e. Quotation, Order, Not Interested, Demonstration Arranged, etc. The data in this table is usually designed to reflect the requirements of all the Operating Divisions.

These codes are grouped in the Activity Result Category Table (callrslc). The data in this table should be designed to address the needs of the entire corporation.

The data in the Activity Result Category Table must exist before entering data in the Activity Result Code Table.

Activity Result Category fields in table CALLRSLC

Field Name	Field Description
Category Id	A unique identification code.
Description	The description of the activity result category

Activity Result Code fields in table CALLRSLT

Field Name	Field Description
Result Id	A unique identification code for the activity result
Description	The description of the activity result
Result Category	A unique identification code for the activity result category

Activity Result Hints and Tips

- The Activity Result IDs should be created manually.
- Each Table must contain at least one record.
- Default records with the IDs of '00000' are recommended.
- The data in the Activity Result Category table must exist before entering data in the Activity Result Code table

Activity Result Data Example

Activity Result Category Codes

Result Cat Id	Description
00000	*Default Activity Result Category*
AINT	Maintenance Record
ORDER	Orders
QUOTE	Quotation Cycle
DEMO	Demonstration
SERVICE	Service
TRAIN	Training

TRAIN	Training
CALL	Cold Call
HELP	Help Desk
SUPPORT	Support
DOCUMENT	Letters and Documents
INTEREST	Interested
NOTINT	Not Interested
NOTAVAIL	Not Available
CALLBACK	Call Back

Activity Result Codes

Result Cat Id	Result Id	Description
00000	*00000*	*Default Call Result Code*
CALLBACK	CL	Call later
DOCUMENT	BR	Brochure sent
DOCUMENT	BRM	Brochure Sent - Mild Interest
DOCUMENT	BRC	Brochure Sent - Cold Interest
DOCUMENT	DOM	Document Sent - Maintenance
DOCUMENT	DOW	Document Sent - Warranty
DOCUMENT	DS	Diskette Sent - Software
DEMO	DA	Demo arranged
DEMO	DR	Demo required
INTEREST	IN	Interested
INTEREST	FI	Interest - Future
NOTINT	WC	We Call you Later
NOTAVAIL	NA	No answer
NOTAVAIL	UM	Unavailable Message Left
NOTAVAIL	UCL	Unavailable Follow up Later
QUOTE	QR	Quotation Requested
QUOTE	FQ	Quotation Follow up
ORDER	OE	Order received
SERVICE	MR	Request Service
SERVICE	SR	Support Requested
TRAINING	TR	Training Requested

Key

Abc: These are the typical recommended records.
Abc: These are the mandatory or system dependant records

Activity Status

The Activity Status code is used to group the Activity Transaction records by their status, i.e. Open, Closed etc.

Activity Status Tables and Fields

The Activity Status data is maintained in the Activity Status (callstat) table.

The data in this table should be designed to address the needs of the entire corporation.

Activity Status fields in table CALLSTAT

Field Name	Field Description
Activity Status Id	A unique identification code.
Description	The description of the activity status

Activity Status Hints and Tips

- The Codes for the Activity Status records should be created manually.

The “C=closed”, “O=open” and ‘K=keep’ codes must exist in the table at all times.

Activity Status Data Example

Activity Status Codes

Status Id	Description
00000	Default Call Status
K	**Keep**
C	**Closed**
O	**Open**

Key

Abc: These are the typical recommended records.
Abc: These are the mandatory or system dependant records.

Activity Type

An Activity Transaction between an Executive and a Contact can take place in many forms (types) and in many places, i.e., Inbound Phone Call, Meeting at Site, Written Communication.

It is always useful to be able to analyse how and where the calls (activities) have taken place. This analysis will help to devise the new methods of marketing, sales and customer service or to refine the existing methods.

Activity Type Tables and Fields

The Activity Type codes are maintained in the Activity Type Code Table (calltype), i.e. Phone Inbound, Site Meeting etc. The data in this table is usually designed to reflect the requirements of all Operating Divisions.

These codes are grouped in the Activity Type Category Table (calltypc). The data in this table should be designed to address the needs of the entire corporation.

The data in the Activity Type Category table must exist before entering data in the Activity Type Code table.

Activity Type Category fields in table CALLTYPC

Field Name	Field Description
Type Category Id	A unique identification code.
Description	The description of the activity type category

Activity Type Code fields in table CALLTYPE

Field Name	Field Description
Activity Type Id	A unique identification code for the activity type
Description	The description of the activity type
Activity Type Category	Unique identification code of activity type category

Activity Type Hints and Tips

- The Activity Type IDs should be created manually.
- Each Table must contain at least one record.
- Default records with the IDs of '00000' are recommended.
- The data in the Activity Type Category table must exist before entering data in the Activity Type Code table

Activity Type Data Example

Activity Type Category Codes

Type Cat Id	Description
00000	*Default Call Type Category*
WRITE	Written Communications
MEET	Meetings
PH	Phone

Activity Type Codes

Type Cat Id	Type Id	Description
00000	*00000*	*Default Call Type*
PH	PI	Phone Inbound
PH	PO	Phone Outbound
MEET	MS	Meeting, Site
MEET	MO	Meeting, Office
WRITE	WR	Written Communications
WRITE	FAX	Fax

Key

Abc: These are the typical recommended records.
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Next Action

When an Activity Transaction is initiated between the Executive and Contact, there's usually a Next Call Action (Follow up) for it, i.e. Follow up a Letter, Demonstration, Follow up a Quotation, etc.

The Activity Reason and the Next Call Action codes are very similar in their concept and definitions. In fact, usually they are interchangeable.

When a follow up is performed, as the existing call transaction is closed, usually the Next Call Action becomes the Activity Reason for the new Activity Transaction

The Next Activity Action code usually complements the meaning of the Activity Result code in a call transaction.

There are two very specific uses of the Next Action codes.

1. Update the Sales Cycle Fields on the related Contact and Company records
2. Allow the Escalation process to escalate the related activities.

Checking the related check boxes against the Activity Next Action Codes activates these functions.

Activity Next Action Tables and Fields

The Activity Next Action codes are maintained in the Activity Next Action Code Table (callnact), i.e. Follow Up Quotation, Demonstration, etc. The data in this table is usually designed to reflect the requirements of all the Operating Divisions.

These codes are grouped in the Activity Next Action Category Table (callncat). The data in this table should be designed to address the needs of the entire corporation.

Activity Next Action Category in table CALLNCAT

Field Name	Field Description
Next Action Cat Id	A unique identification code.
Description	Description of the Activity Next Action Category

Activity Next Action Code in table CALLNACT

Field Name	Field Description
Next Action Id	A unique identification code.
Description	The description of the Activity Next Action
Next Action Cat Id	Next Action Cat Id
Update Contact/Company	Check the box if this code is going to update the sales cycle fields in the contact or company site records.
Escalate Sales / Support Activity	Check the box if this code is going to escalate the related activities

The data in the Activity Next Action Category Table must exist before entering data in the Activity Next Action Code Table.

Activity Next Action Hints and Tips

- The Activity Next Action IDs should be created manually.
- Each Table must contain at least one record.
- Default records with the IDs of '00000' are recommended.
- The data in the Activity Next Action Category Table must exist before entering data in the Activity Next Action Code Table.
- If you are using the automatic <Follow Up> creation function of the activity transaction maintenance, then it is necessary to ensure that the codes in the Next Action Call table are also available in the Activity Reason table.

Activity Next Action Codes Example

Activity Next Action Category Codes

Category Id	Description
00000	*Default Next Call Action Category*
NOTE	Notes entry
MAINT	Maintenance
HELP	Help Desk
SUPP	Support
SERV	Service
OR	Orders
QT	Quotations
MM	Mail marketing
TM	Tele marketing
CALL	Cold Call
TRAIN	Training
INSTALL	Installation

Activity Next Action Codes

Category Id	Next Action Id	Description
00000	*00000*	*Default Next Call Action*
CALL	CR	Call Return
MM	FM	Follow up Mail
SERV	SR	Service Call
SUPP	SP	Support Call
FUP	FC	Follow up Call
FUP	FB	Follow up Brochure
FUP	FQ	Follow up Quote
QT	QT	Quote
TM	TM	Telemarketing
TRAIN	TR	Training
DEMO	DA	Demo Arranged
DOCUMENT	SC	Contract Sent
FUP	FMEET	Follow up Meeting

Key

Abc: These are the typical recommended records.

Abc: These are the mandatory or system dependant records.

To Do Type

Their types, i.e. Planning, Insurance, and Contract etc, use the To Do Type code to group the To Do records.

To Do Type Tables and Fields

The To Do Type code is maintained in the To Do Type Code Table (todotype)

The data in this table should be designed to address the needs of the entire corporation and all the related modules.

To Do Type fields in table TODOTYPE

Field Name	Field Description
To Do Type Id	A unique identification code.
Description	The description of the To Do Type

To Do Type Hints and Tips

- The Codes for the To Do Type records should be created manually.
- The table must contain at least one record.
- Default record with the ID of ‘00000’ is recommended.

Default To Do Type value should be set in User Option’s User>Activity section. Value is defaulted for general To Do enquiries.

To Do Type Codes Example

To Do Type Codes

Type Id	Description
00000	Default type
PLAN	Planning
CONT	Contract
INSR	Insurance

Key

Abc: These are the typical recommended records.

Abc: These are the mandatory or system dependant records.

To Do Category

The To Do Category code groups the To Do records by their categories, i.e. Pre Contract, Contract, Post Contract etc.

To Do Category Tables and Fields

The To Do Category code is maintained in the To Do Category Code Table (todocat)

The data in this table should be designed to address the needs of the entire corporation and all the related modules.

To Do Category fields in table TODOCAT

Field Name	Field Description
To Do Category Id	A unique identification code.
Description	The description of the To Do Category

To Do Category Hints and Tips

- The Codes for the To Do Category records should be created manually.
- The table must contain at least one record.
- Default records with the ID of '00000' are recommended.
- The default To Do Category value should be set in the User Option's User>Activity section. This value is defaulted for the general To Do enquiries.

To Do Category Codes Example

To Do Category Codes

Category Id	Description
00000	Default Category
PRECONT	Pre Contract
CONT	Contract
POSTCONT	Post Contract

Key

Abc: These are the typical recommended records.

Abc: These are the mandatory or system dependant records.

To Do Status

The To Do Status code is used to group the To Do records by their statuses, i.e. Active (Open), Closed etc.

To Do Status Tables and Fields

The To Do Status code is maintained in the To Do Status Code Table (todostat). The data in this table should be designed to address the needs of the entire corporation and all the related modules.

To Do Status fields in table TODOSTAT

Field Name	Field Description
To Do Status Id	A unique identification code.
Description	The description of the To Do status

To Do Status Hints and Tips

- The Codes for the To Do Status records should be created manually.
- Default record with the ID of '00000' is recommended.

- The “C=closed”“, A=active” codes must exist in the table at all times.

To Do Status Codes Example

To Do Status Codes

Status Id	Description
00000	Default Status
A	Active
C	Closed

Key

Abc: These are the typical recommended records.
Abc: These are the mandatory or system dependant records.

Workflow Type

Their types, i.e. Planning, Insurance, and Contract etc, use the Workflow Type code to group the Workflow Template and the Action Plan records.

Workflow Type Tables and Fields

The Workflow Type code is maintained in the Work Flow Type Code Table (wrkftype).

The data in this table should be designed to address the needs of the entire corporation and all the related modules.

Workflow Type fields in table WRKFTYPE

Field Name	Field Description
Type Id	A unique identification code.
Description	The description of the Workflow Type

Workflow Type Hints and Tips

- The Codes for the Workflow Type records should be created manually.
- The table must contain at least one record.
- Default record with the ID of ‘00000’ is recommended.

Work Flow Type Codes Example

Work Flow Type Codes

Type Id	Description
00000	Default type
PLAN	Planning
CONT	Contract
INSR	Insurance

Key

Abc: These are the typical recommended records.
Abc: These are the mandatory or system dependant records.

Activity Management

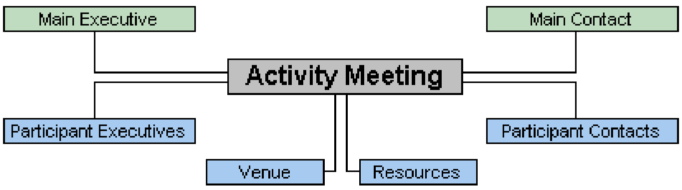
Activity & Appointments

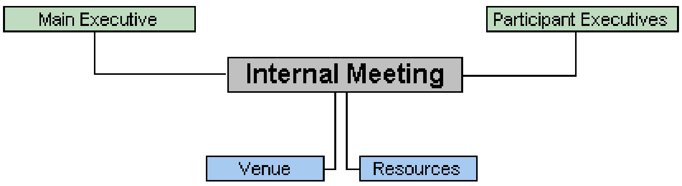
Executives can be involved various levels and types of activities.

External Task	Executive has a task for or with a Contact at a certain date or time without an appointment
External Appointment	Executive has an appointment with a Contact at a certain date and time for a nominated duration.
External Group Appointment	Executive has an appointment with one or more Contacts at a certain date and time for a nominated duration with the participation of other executives.
Internal Activity	Executive has a date and time allocation for himself or herself for any reason, setting him or herself unavailable for any other activities.
Internal Group Appointment	Executive has set aside time for himself and group of other executives for any reason setting those unavailable for any other activities.
Venue and Resource Allocation	Venue and resources can be allocated for the appointments, which makes the appointment automatically a group meeting.

The executive requesting a group meeting is known as its Owner.

The following block diagram summarises the above options.



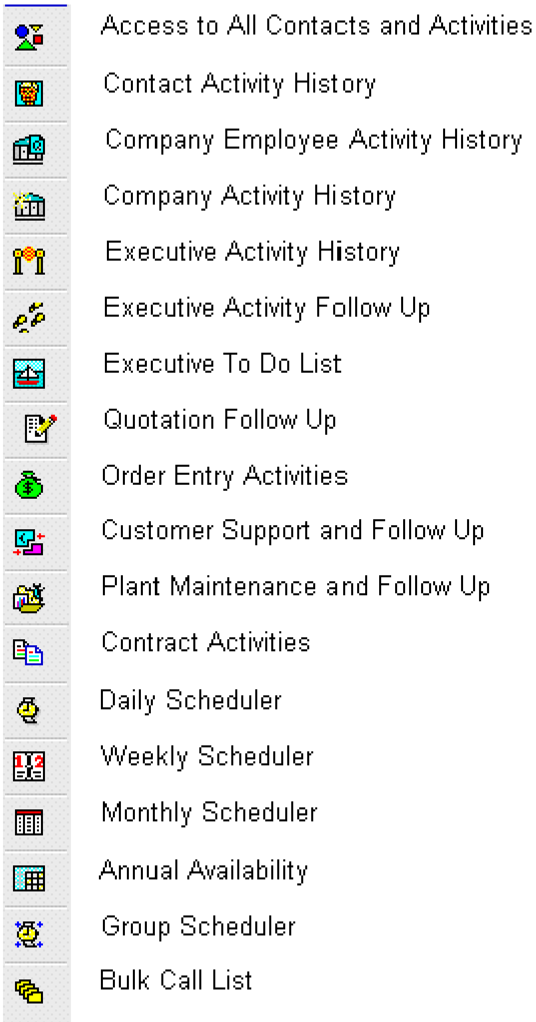


The External Activities are maintained on the Standard or Quick Activity maintenance windows

Activity Bar

The Activity Bar contains all the icons that allow the user to access various interactive query windows in order to access the entire Efficiency System from the activity level up, various scheduler options and Bulk Call List.

Click on the Icon to display the details.



Activity Maintenance

You can create an activity transaction or access to an existing activity from a number of different sections within Efficiency:

1. Using Efficiency's Activity and Appointment Scheduling and Maintenance functions

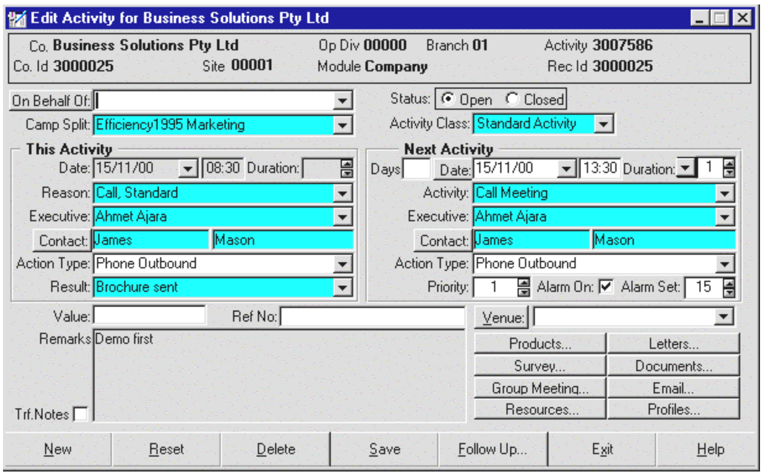
   - Create/Find a contact and create or edit an activity transaction or appointment for that contact
   - Create/Find a company/employee and create or edit an activity transaction or appointment for that contact
   - Find an executive and create or update follow up activity transactions
   - Find an activity transactions from any activity history options and edit, update or follow up activity transactions

3. From within the Company, Contacts or Membership modules/TAB Folders create or edit an activity transaction

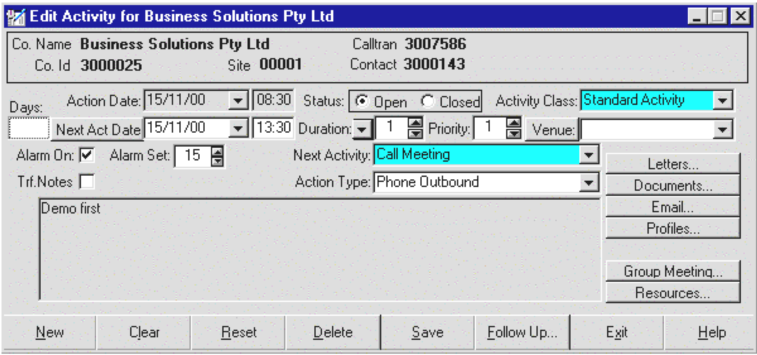
4. An activity transaction is automatically created when creating or following up a:

   - Quotation
   - Order
   - Customer Support
   - Service and Maintenance
   - Event
   - Mail Marketing

Standard Activity Maintenance Window



Quick Activity Maintenance Window



This window is used to maintain the very *basic* Activity information.

This window is preferably used for the purpose of only editing one or more of the following fields:

- Activity Remarks
- Next Call Date and Time
- Next Call Priority
- Alarm On and Off

Format Activity Maintenance Windows

The activity engine is the driving engine of Efficiency; it's designed to hold vast information some of which may not be applicable to the site or the user.

System allows each user to configure the standard and quick activity screens to suit each user's needs as detailed in the How to Format Activity Maintenance Window topic

Prerequisites

At least one Activity default must be created and assigned to each user's New Activity and Follow Up Activity Default values in the User Options.

Please refer to the Activity Defaults and How to Use Activity Defaults topics for the details and options of the call defaults.

If the Activity Defaults were already set up the fields on the screen are filled with the default values. The different activity defaults for different options are highly recommended. The Defaults option from the Popup menu allows the user to select another activity default.

IMPORTANT REMINDER -It is important to remember each new activity must be entered as a new record rather than editing the existing record.

Data Maintenance Fields - NOW

REMEMBER the first part of the activity **THIS ACTIVITY or NOW** is entered to capture what has happened during the event, activity or contact. Therefore, you should change any one of the following inside the **THIS ACTIVITY** box

The **FOLLOW UP** should have been entered during the activity as what was going to happen as **NEXT ACTIVITY**.

Campaign Split: Select from the available list the appropriate campaign split that activity relates to. This will be used for reporting purposes by campaign and campaign split.

If this record does not relate to any Campaign Split, simply leave it with the default value.

On Behalf Of: If this activity was created on behalf of another contact select the contact from the drop down list.

Example: Activity was made to a solicitor on behalf of a client,

Date: - The current date will be displayed by the system. This can be changed if required. Use the dropdown calendar or enter the date manually.

Time: - The current time will be displayed by the system. This can be changed if required and time is 24 hours clock.

Duration: - How long this activity took in time, entered as the 'Number of time Segments'. 1 = 30 mins as default eg if it was a meeting it could be 2 hours, then enter here 4.

Reason: Select from the available list the reason for the activity transaction, eg Follow Up Phone Call or Telemarketing.

Executive: The system will display the current executive's name from the log in. This can be changed if required.

Contact First and Last Name: - The first and the last name of the contact involved in this activity transaction should be entered here. To select from the list of existing contacts simply click on the Contact button for the company activities. For the Contact activities, this function is not required, as the name would be entered by the system.

Action Type: - Select from the available pick list for the type of action., eg Phone Outbound, Meeting Site etc

Result: - Select from the available list the result of this activity transaction, eg Letter and Document sent. Interested, Call Later etc.

IMPORTANT NOTE - The Result Code is very important. It has the following effects on the system:

- To analyse the result of each activity transaction
- Act as an accumulator trigger for the History records.

Activity Remarks: - Add or modify the remarks for the transaction. In some cases, the user is only allowed to append new remarks to the existing ones.

Double click on the field to pop up a larger data entry window for the remarks.

Status: - Click on one of the following if you wish to maintain the status manually. The 'Follow up' functions will automatically set the existing Activity status to 'Closed' and the new one to 'Open'.

Open: If this activity is to remain open until an action is to be taken, eg demo organised

Closed: If this activity is closed, eg demo completed. The activity with the closed status is displayed in blue on all activity display lists.

Mode: - Click on one of the following:

Value	Notes
Action	If this call transaction is an action, eg demo organised
Response	If this call transaction is a response, eg request for brochure to be sent
Maintenance	If this call transaction is a maintenance type calls, eg updating the database for addresses and phone numbers.

Activity Class: Enter here the activity class from the drop down list. This is very important information as it affects the deletion and purging function of the activity record.

Class	Notes
Standard	General Activity can be deleted within the standard system security
Compliance	The activity may not be deleted as set in the User Shared Options.
Others	Same as standard designed to suit the operation to give more detailed analysis.

NEXT Action

THEN we enter what is going to happen NEXT

Days: Enter here the days for the next action. The next action date will be displayed by adding the days to the today's date.

Date: Enter the date for which the next (Follow Up) action will take place. The drop down calendar is available on this field.

Click on the <Date> button to display the Daily Scheduler of the executive for the next action date.

Time: Enter the time for which the next (Follow Up) action will take place.

Duration: How long this next (Follow Up) will take is entered here in blocks of the nominated time segments (1 = 30 mins as default). This is in conjunction with the diary system for blocking out meetings.

If the nominated time will overlap with an existing appointment or an unavailable time slot, the status displays on a dialogue box. If the User Options are doesn't allow double bookings the appointment is rejected.

If there was no duration then the activity is considered a Task.

The Venue, Resource and Group Meeting allocations can only be made if there is duration in the activity.

<u>Date, Time and Duration Edit Control</u>
The following User Option allows the Call Date, Time and Duration to be editable or Not

AllowToEditActivityCallDateTime: Yes/No

Limit the Appointment Duration
System limits the value of the appointment duration entry maximum of 42 units (half hrs) based on the following calculations.

- Allowed Duration = (23:00 – Next Action Time) * 2

For example, if the next action time is 17.30 the maximum duration can not be more then 11 units (5.5 hour)

Activity (Next Action): - Select from the available list the next action required for this activity transaction this is, eg Demonstration Organised, Follow up Quotation etc.

The Next Action is usually used as complementary information to the activity result.

If the activity item is set to Update Contact in the table then the Sales Cycle field of the contact will be updated and the date will be stamped.

Executive: Click once to allocate the next (Follow Up) activity transaction to the same executive. Use the drop down list if you wish to allocate another executive from a selection list.

Contact First and Last Name: The first and the last name of the contact to be contacted in the next activity transaction should be entered here. To select from the list of existing contacts simply click on the Contact button for the company activities. For the Contact activities, this function is not required, as the systems will enter the name.

Call Type: Select from the available list the type of action required for the next (Follow Up) activity, eg Phone Outbound, Meeting Site etc.

Venue: Select a venue to hold the meeting. The grouped meeting venues in the user options will be displayed on the drop down list.

Priority: If required enter the priority number 1-9 that this activity transaction has. This will result in activity transactions being displayed by order of priority.

Alarm On: Click on this field if you wish the system to remind you when this next (Follow Up) activity time is due. Leave this field blank if you do not want to be reminded.

Alarm Set: Enter here the minutes for the system to pop up the alarm box for that many minutes before the set alarm time.

Activity Functions

Once the new Activity Transaction was created (saved) you can maintain every aspects of an Activity, including to *attach* the following records to the Activity Transaction:

Letters
You can attach multiple letters and documents to the activity. Click on the <Letters> command button and activate the Main Letters for Activity window.

Documents
You can attach multiple documents to the activity if the site's licence includes the 'Document Management" module. Click on the <Document> command button and activate the Activity Documents Activity Window.

Products
You can attach multiple products to the activity if the site's licence includes the 'Product Management" module. These products usually represent the company or

contact's interests in these products. Click on the <Product> command button and activate the Activity Product Attachment Window. If the "Host" system is used the available product quantity can be enquired on this window.

Profiles

You can attach multiple profiles to the activity. Click on the <Profiles> command button and activate the Activity Profiles window.

If any one of the functions assigns one or more items to the Activity, of the text on the command button, which had activated the function, turns to bold.

Survey (Questionnaire)

If the Call Centre Module is available, this command button is enabled. Click on it to activate the Survey Form Window.

Follow up

The <Follow Up> command button will "Close" this Activity and create a new one by using the pre-determined 'Follow Up Activity Default'.

If the activity was part of a workflow this activity will be closed and the Workflow Action Follow-up window is displayed. Based on the action taken on this window will create the Follow Up activity in line with the Workflow Action Plan.

Venue

Click on this button to display the Venue Allocations grid.

Resources

Click on this button to display the Resource Allocation grid.

Trf (Transfer) Notes

In some cases, the notes and remarks that were entered in an activity may contain specific or general information that you may wish to attach against the Company Site or the Contact. Click on this check box to transfer the remarks as notes to the Company Site or the Contact record.

See the Module Notes topic for the details and the usage of the notes.

Group Meeting

Click on the <Group Meeting> button to attach external contacts and internal executives in the Create and Maintain Group Meetings topic. The resources are also allocated at the same time.

The group meetings are allocated only if the activity was an appointment.

Email

If you wish to send an Email to the contact of this activity by copying the activity remarks as the email text and at the same time to record the email as part of the activity click on the <Email> button.

Otherwise use the pop up menu Email option to send any email to the contact or any other recipient. The email of this method is not recorded on the activity.

Other Functions

Use the right mouse click to pop up the menu to access other functions (you can access almost the entire Efficiency) as described in the Activity Pop-up Menu

Options.

Modify Header Information

Using the Development Kit the header section of the window can be modified. In this case the User Options allows the supervisor to enter the name of the new data object in the Activity Normal (Quick) Entry Header Data Object section. The System uses this object as header when entering or editing the activity in a normal (quick) mode

Activity Display Restrictions

Activities can be restricted based on the selected Activity Reason Category ID's assigned to the executives in the Supervisor Functional privileges set up option.

If the Security Log on option 4 is used, executives with these Reason Categories will not be able to see the activities for those categories.

The following User Option allows the Call Date, Time and Duration to be editable or Not.

Allow To Edit Activity Cal Date Time: Set to Yes or No

Activity Formatted Report

The Formatted Report option of the Print function from the pop up menu of the activity entry windows will print an Activity Job Sheet to detail the following

- Activity Summary
- Contact details
- Last Module Notes

Limit the Appointment Duration

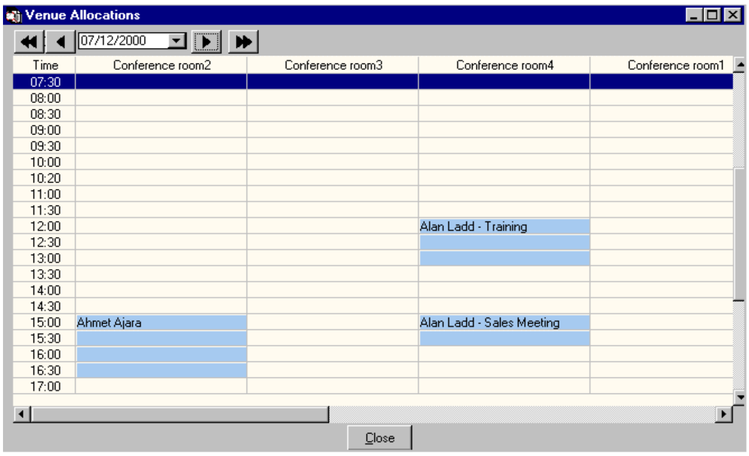
System limits the value of the appointment duration entry maximum of 42 units (half hrs) based on the following calculations.

- Allowed Duration = (23:00 – Next Action Time) * 2

For Example if the next action time is 17.30 the maximum duration can not be more then 11 units (5.5 hour)

Venue Allocations

The venue allocations are displayed on the following grid window.



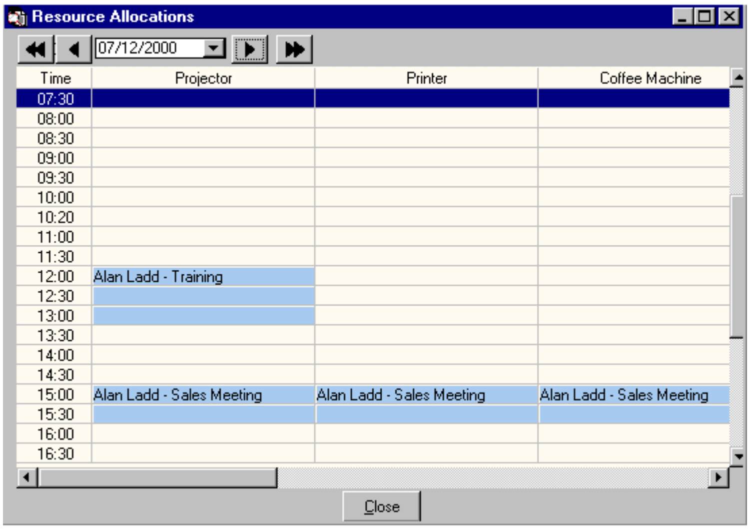
Double click on the allocation (coloured fields) to display the details.

The supervisor via the supervisor data maintenance utility can remove the future venue allocations globally. The venues can't be double booked.

Resource

The resource allocations are displayed on the following grid window.

Allocations



Double click on the allocation (coloured fields) to display the details.

The supervisor via the supervisor data maintenance utility can remove the future resource allocations globally. The resources can't be double booked.

Attach Letters to Activity

The letters that are attached to activities can be recorded and/or stored in various methods.

Select and Use document template that was created and registered in Efficiency as Stock Letter or Standard Letter Template. These documents are created using the Registered Letters function. These documents are Word documents and registered in the system without any file extensions. The first option is NOT TO ARCHIVE the letter, simply merge and print it. This is typical for any letter that the content does not need to change

Use document template that was created and registered in Efficiency as Stock Letter or Standard Letter Template

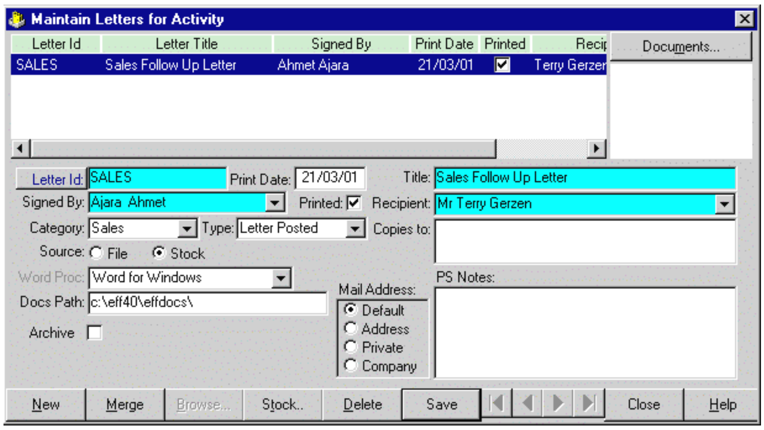
In the second option, select the stock letter template as normal, click on the archive check box let the system merge the letter, make the changes. System will assign a sequential number to the document with the .DOC extension will save it to the network directory that was assigned in the User's Shared Options.

Select an existing letter using the Browse button and save it as file source

For option 2, the supervisor must set the following.

- The letter table must be set to Auto Number by the supervisor
- The mail section of the User Shared Options should be set to:
- Auto Generate Mail File Name = Yes
- Main Storage Directory for Letters = Network Directory

The letters and documents are attached to the activity or edited using the following window.



There are three sections on this window.

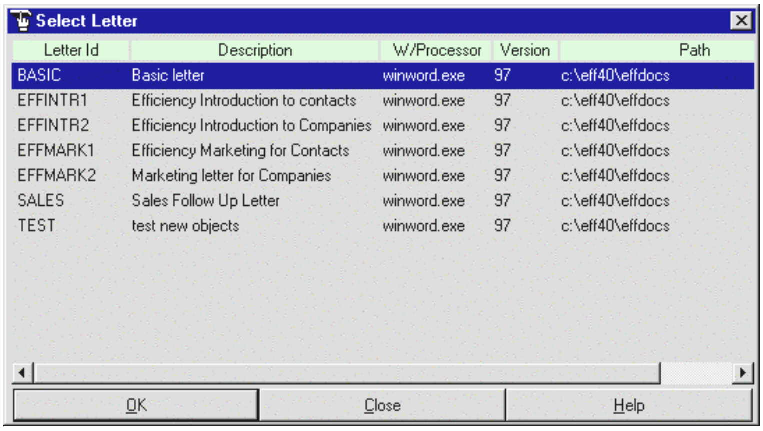
- The list of the attached letters
- The List of the attached documents to a letter
- The Letter details.

New

Click on this button to assign a new letter.

Use the Letter Id button to select a letter template for options 1 and 2 type assignments.

System will display the Letter Selection window.



Highlight the selected letter and click on the Select button. The details of the letter template will populate the Maintain Letters for Activity window.

If the Option 3 is to be used check the File radio button, uncheck the archive button and click on the Browse button to select an existing letter from the network directories.

In the latter option, the user should enter all the related fields.

Open/Merge

When a new record was created (saved) or an existing record was retrieved this button may display one of two options.

Merge	Merge the letter and display merged Word Document.
Open	Open the archived Word Document

Browse

When the File radio button was checked this button allows the user to search the network directories for pre-saved Word documents.

Stock

Starts up the Register Letter window to edit the details of the letter template.

Documents

Letters can be attached with documents. Click on this button to pop up the Attach Documents to Call Letter window.

Data Fields

Letter Id: Using one of the previously described options populates this field.

Print Date: To day's date

Signed By: The executive who signed the letter or the sender of the letter.

Printed: Checked by the system when the letter was printed first time.

Category: Select an appropriate letter category for reporting purpose.

Type: Select an appropriate letter type for reporting purpose.

Source: Check the File or Stock radio buttons depending on the source of the original letter as explained above.

Word Processor and Docs Path: These fields are populated by the system.

Archive: Check this box if the template letter to be merged and saved as a system generated file name.

Mail Address: Select the mail address. If there is no specific purpose of selecting a special mail address, it should be left to default option, as system will select the pre-determined mail address automatically.

Title: The title or long description of the letter.

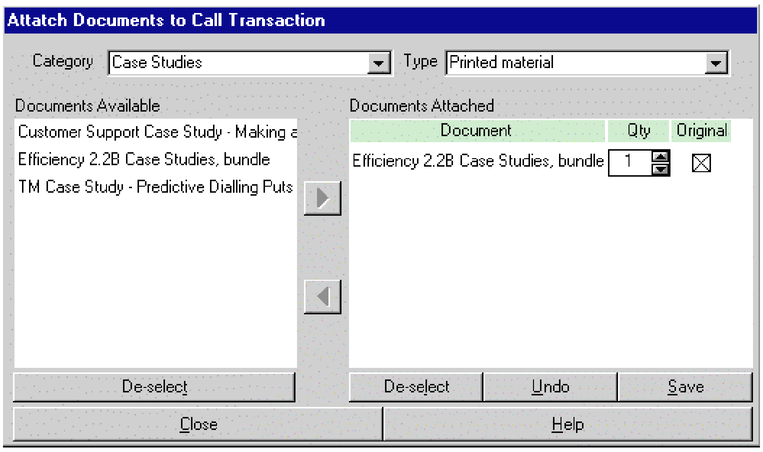
Recipient: The full name of the main recipient (Contact).

Copies To: A text field in which the other recipients of the letter can be entered for information.

PS Notes: The text on this field can be merged to the letter as PS.

Attach Documents to Activity Letter

Use this window to select documents and attach them to a letter.



The selected Documents from the <Available> list can be transferred to the <Assigned> list. The items from the <Assigned> list also can be transferred back to the <Available> list.

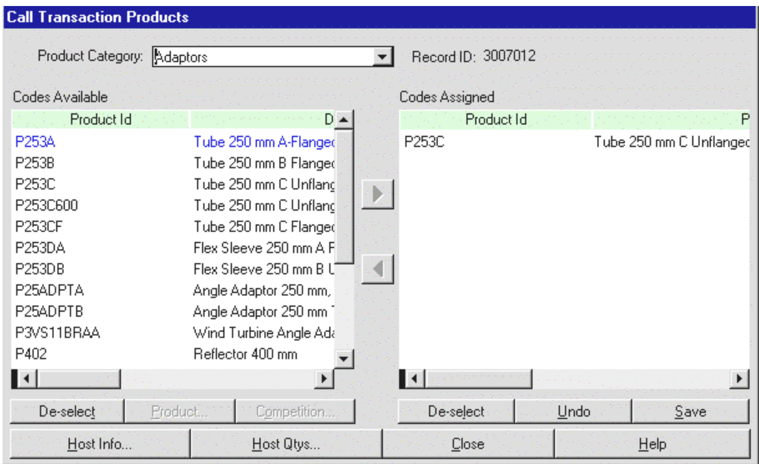
The Document Category and Type drop down fields are used to refine the selection of the available documents.

Activity Transaction Products

During the creation of a call transaction or editing afterwards, the products in which the contact was expressed interest can be recorded against the call transaction for a future reference. The Activity Product Attachments Window designed to achieve this task.

First, select a suitable Product Category at the Category Drop Down window. The products belonging to this category will be displayed automatically on the <Available> list.

The <Assigned> list displays the products which were already attached to this activity transaction



The selected Products from the <Available> list can be transferred to the <Assigned> list. The items from the <Assigned> list also can be transferred back to the <Available> list.

If any error occurs, click on <Reset> or <Undo> to undo the actions.

Other Functions

Use the following command buttons to start up the related functions.

Product

Click on this button to start up the Product Module for the details of the product, which is already highlighted on the <Available> list.

Competition

Click on this button to start up the Product References window to display the information from the vendors and competitors for the product, which is already highlighted, on the <Available> list.

Host Info

If your system is linked to a Host System, click on this button to start up the Host Information window to display the information from the Host Inventory System for the product, which is already highlighted, on the <Available> list.

Activity Transaction Documents

While creating or editing an activity transaction, forwarded documents (by physical or electronically means) are recorded against the activity. As shown on the Activity Documents Attachment Window.

If the documents are enclosed to a letter, the Attach Documents to Call should be used.

On the Activity Documents Attachment window, first select a suitable Document Category and a Document Type at the Category and Type drop down list. The documents belonging to the selected category and type will be displayed automatically on the <Available> list.

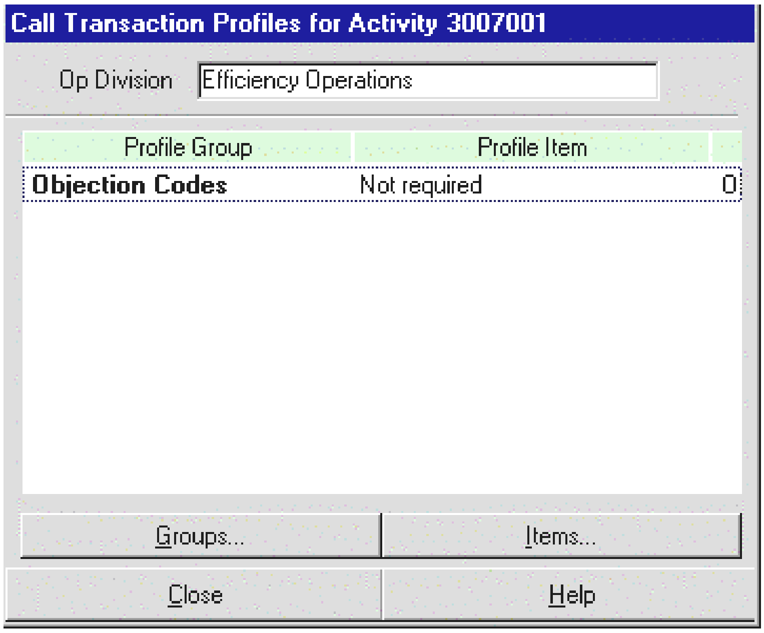
The <Assigned> list displays the documents which were already attached to this activity transaction

The selected documents from the <Available> list can be transferred to the <Assigned> list. The items from the <Assigned> list also can be transferred back to the <Available> list.

If an error occurs, <Reset> or the <Undo> buttons will undo the action.

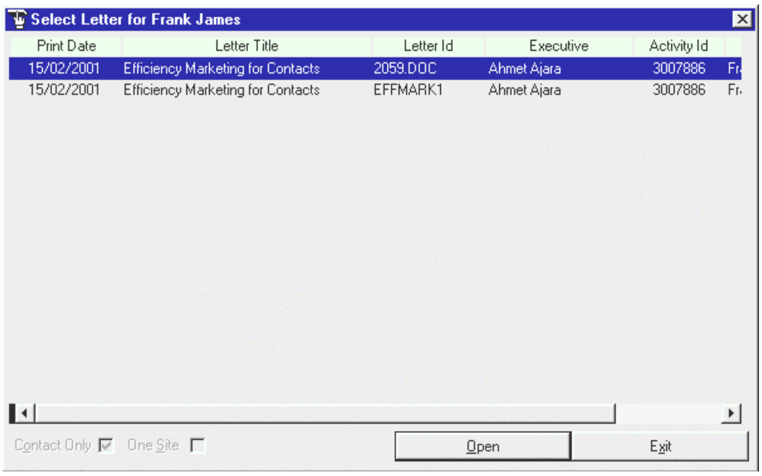
Activity Profiles

You can add as many user defined Profile Groups and Items to the Activity records.



List of Letters

All the Pop Up Menus from the Company and Contact related window has an additional item under the Activity section to list all the letters for the selected record.



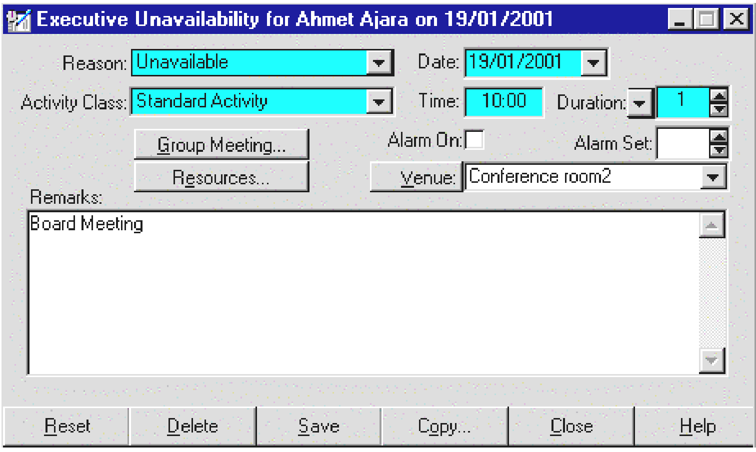
Double Click on the selected item or clicking on the Open button will start up WinWord with the selected document.

Reminder: Files with '. DOC' extensions are stored documents. Template files with are those with no extension previously sent to a client once merged. Click on these to open the template.

Executive Availability

The internal unavailability and appointments are maintained through the window below. The participants of the external appointments are accessed from this window in read only mode.

Availability



Data Fields

Reason: Select an appropriate reason from the dropdown list.

- Business
- Holiday
- Long Leave
- Other
- Public Holiday
- Sick
- Training
- Unavailable

Activity Class: Select an activity class from the dropdown list.

The Compliance class may stop the deletion of the related unavailability record.

Date, Time and Duration: These 3 fields are mandatory. The duration is multiples of 30 minutes. 1 equals 30 mins, 2 is 60 minutes and so on.

Click on the Down Arrow next to Duration to select from a set of fixed duration.

Alarm on and Alarm Set: Check the alarms box if the alarm is to be set. The Alarm set value is the minutes before the actual time that the alarm will sound.

Venue: Select a venue for the meeting,

Click on the Venue button to display the Venue Allocations Grid.

Resources: Click on the Resources button to display the Resource Allocations Grid.

Group Meetings: Click on this button to assign a group meeting. The Create and Maintain Group Meetings topic details this function**.**

If there was a group meeting including the allocation of a venue or resources, the text on this button is displayed in bold.

Remarks: Enter remarks for the record.

If the multiple appointments are permitted, system will create the appointment with a warning. The venue and resources cannot be double booked.

Command Buttons

Copy

The single, group or re-occurring records can be copied or created by clicking on this button. The Auto Create Future Activities topic details these functions.

Delete

Click this button to delete the single, group or the future section of the re-occurring meetings.

Save

The record is saved with various options depending how the overlapping appointments were set up.

Auto Create Future Activities

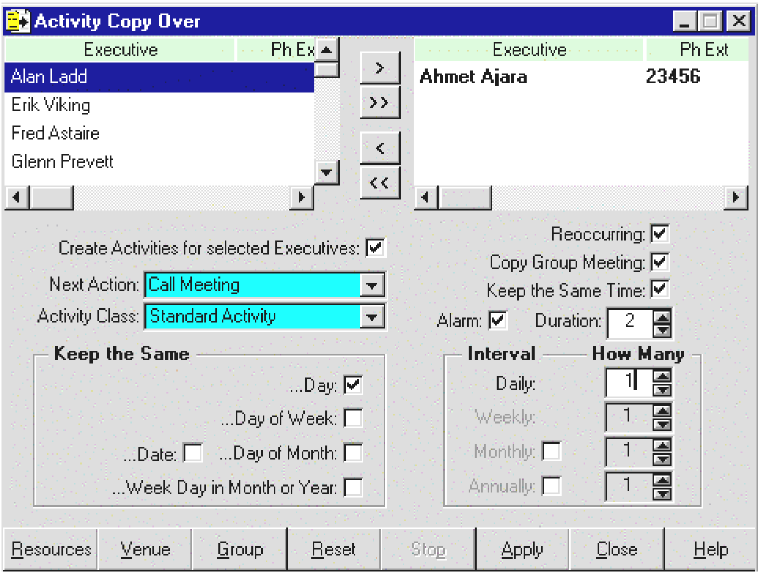
There are situations where the user wishes to create the same activity(s) for the future dates, once only or re-occurring or assign the same activity to another executive with a different Next Action code. Similarly, the single or group appointments (internal) can be repeated or copied over to future dates.

This utility can be accessed from two windows:

Activity Management Window	Creates New Activities or Unavailability records for individual or group meetings/activities
Executive Unavailability Window	Creates Unavailability records for individual or group meetings

Activity Based Copy Over

The following window is displayed when the Activity Copy option was selected from the Activities section of the Pop Up menu of the Activity maintenance window.



Requestor

The name of the requestor (in bold if there were group meetings were involved) is displayed on the top right window.

Other executives can be dragged and dropped in this window from the executives list.

Click on the Venue, Resource, or Group buttons to see the details of these if required.

Create Activities for selected Executives

If this box was checked, system will create activity record for the selected executives and dates from the requestor's original activity record. Otherwise, all the records will be created as Executive Unavailable records.

Reoccurring

Check this box if activities and unavailable records are to be created as reoccurring records.

The reoccurring records are linked to the original activity record. The Non-reoccurring records will not have any linkage between the records.

Te re-occurring meetings will ignore the holidays (based on the holidays set against the Country or State of the Executive's branch).

Keep the Same Time and Duration

Check this box if the original activity/appointment time is to be kept for the future records.

Set the duration of the appointment if required.

Alarm

If the time and duration were set then you can check this box to set the alarm for the future records.

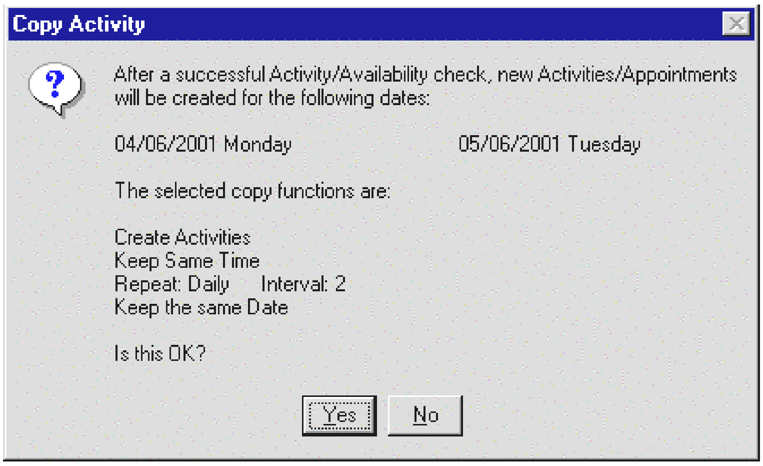
Date Selection Options

There may be 6 possible date selection scenarios:

Date	Days	Relative	Period	Action
Yes			Daily	Create Activity from same day
Yes			Annual	Create Activity for dd/mm of each year
	Yes		Weekly	Create Activity for each 7 days
	Yes		Monthly	Create Activity for dd of each month
		Yes	Monthly	Create Activity for same nth 'Weekday Name' of each month
		Yes	Annual	Create Activity for same nth 'Weekday Name' of each nth week of each year

Apply

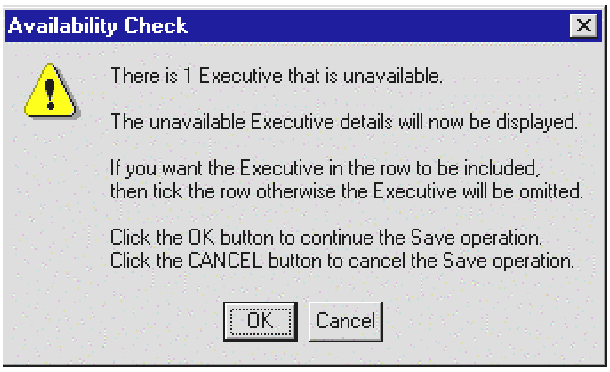
Click on this button to apply the selections. The system will prompt you with a selection summary.



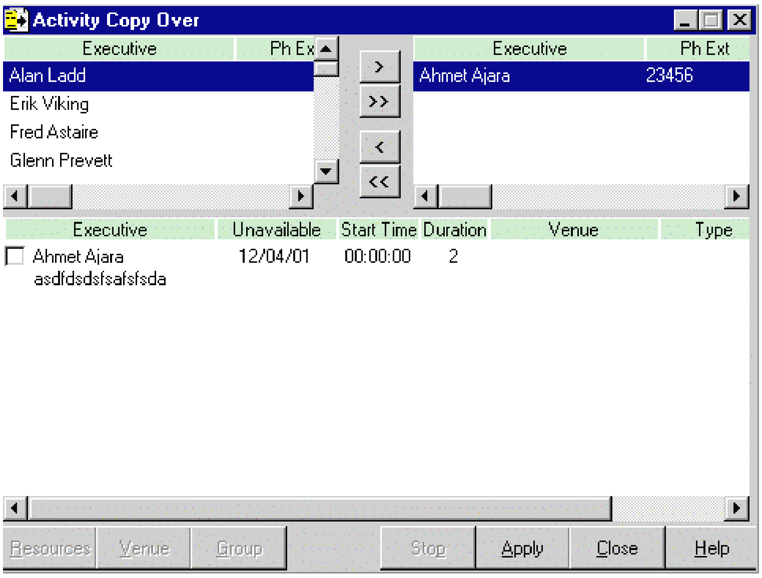
After the acceptance of the message two things may happen.

All future appointments are free; therefore system will create the new records and prompt the result message.

Some of the future appointments are not free; therefore system will warn you with the following message:

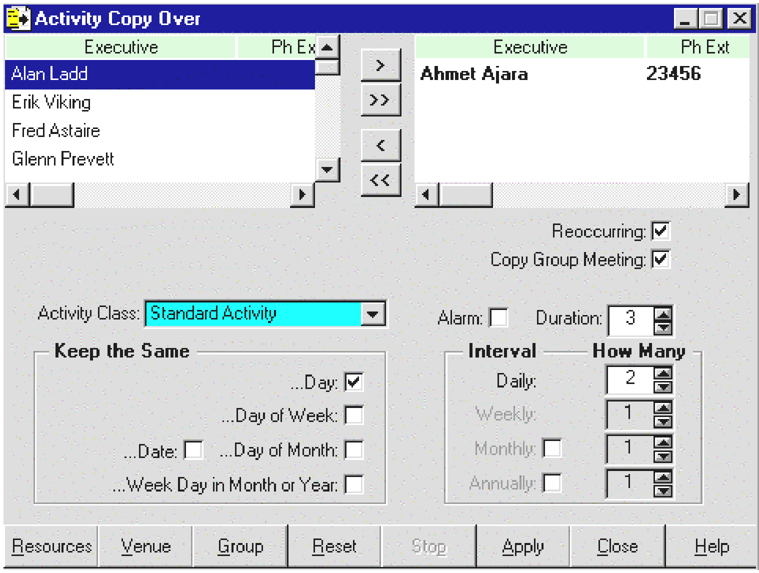


If the message was accepted the following list is displayed to allow the user to tick the executives for an overlapping appointment.



Meeting or Unavailability (internal) Based Copy Over

The following window is displayed when the Copy button was clicked on the Executive Unavailability maintenance window.

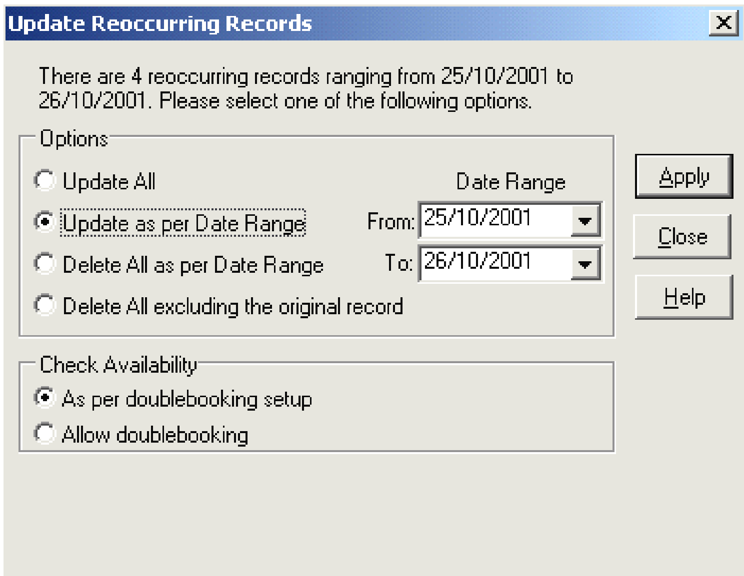


The Copy Over operation of the executive unavailability is very similar to the Activity copy over. There is no activity creation option for this function.

Update Reoccurring Activities

When an activity is modified, a check is made to see if the activity is the original record of a set of reoccurring activities. If it is, we have the option of modifying either all, some or none of the other records in the set (i.e. not including the original record). Note that these activities may be group activities with multiple executives.

In the following example, the original group activity record has a set of reoccurring group activity records for 2 executives for 2 days i.e. 4 reoccurring records.



Using this example, there are four options for these 4 reoccurring records.

These are:

Update All:	All four records will be updated
Update as per Date Range:	Update all records from the start date up to and including the end date. In this case all 4 records
Delete All as per the Date	Same as the previous option but the records will

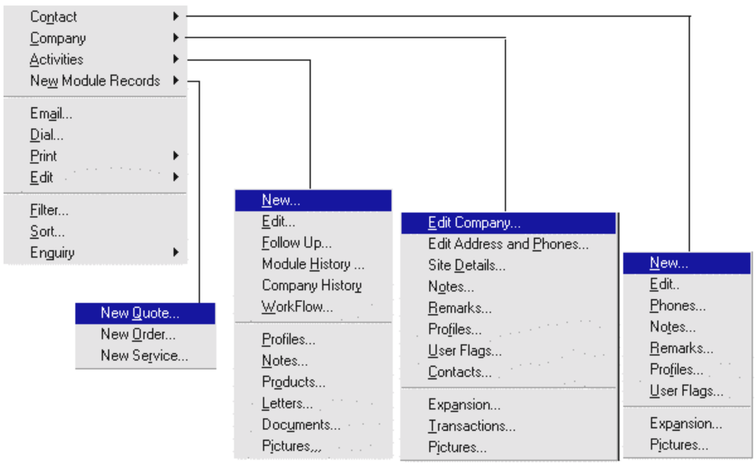
Range:	be deleted instead of updated
Delete All excluding the original record:	Delete all 4 records

When the records are modified, an availability check will be done if the date, time or duration was changed. It is possible that the executive in the reoccurring record may be unavailable for the new period. We have two options on how to handle this possibility. These are:

As per double booking set-up:	An availability check is performed and if the executive is unavailable then the set-up for double booking is checked. This set-up will decide whether the activity is accepted or rejected.
Allow double booking:	No availability check is performed.

Activity List Popup Menu Options for Company

From the any Activity List window the user may right mouse click in any grey area on any Tab to obtain a list of additional functions or enquiries available:



Contact Sub Menu

The options on this menu allows the user to activate directly the Company Contact (Employee) related functions and options

New

Create a new employee record for the company.

Edit

Edit selected company contact record.

Phones

Display employee phone numbers.

Notes

Display Employee Notes for edit or maintenance purpose

Remarks

Edit or maintain contact remarks

Profiles

Display or maintain contact profiles.

User Flags

Display or maintain contact user flags

Attach Transactions

Each contact can have many transactions attached to it as described under the Module Transactions topic.

Expansions

Additional information can be created for each contact and accessed instantaneously as described under the Module Expansions Topic.

Attach Pictures

Each contact can have pictures, documents, audio and video objects as described under the Pictures topic.

Company Sub Menu

The options on this menu allows the user to activate directly the company related functions and options

Edit Company

Edit selected company record.

Edit Address and Phones

Edit selected company's address and phone details.

Site Details

Edit selected company's site details.

Notes

Display Company Site Notes for edit or maintenance purpose

Remarks

Edit or maintain company site remarks

Profiles

Display or maintain company profiles.

User Flags

Display or maintain company user flags

Contacts

Display the list if the company contacts (employees)

Attach Transactions

Each company can have many transactions attached to it as described under the Module Transactions topic.

Expansions

Additional information can be created for each Company and accessed instantaneously as described under the Module Expansion topic.

Attach Pictures

Each company can have pictures, documents, audio and video objects as described under the Pictures topic.

Activities Sub Menu

The activity related additional information and functions are maintained on this pop menu option

New

Creates a new activity for the selected Company and Contact.

Edit

Edits the selected activity.

Follow Up

Creates the follow up record after closing the existing one.

Module History

Display the activities for the module (Quotation, Order, Service etc)

Company History

Display the activities history for the company.

Workflow

Starts the Workflow display and maintenance window for the company.

Profiles

Displays the profiles list for the activity.

Notes

Displays the Notes window for activity.

Products

Displays the Product Assignment window to the activity

Letters

Displays the Letters Assignment window to the activity

Documents

Displays the Documents Assignment window to the activity

Pictures

Displays the Pictures Assignment window to the activity

New Module Records Sub Menu

New Modules are created for the selected Company, Site, and Contact combination.

New Quote

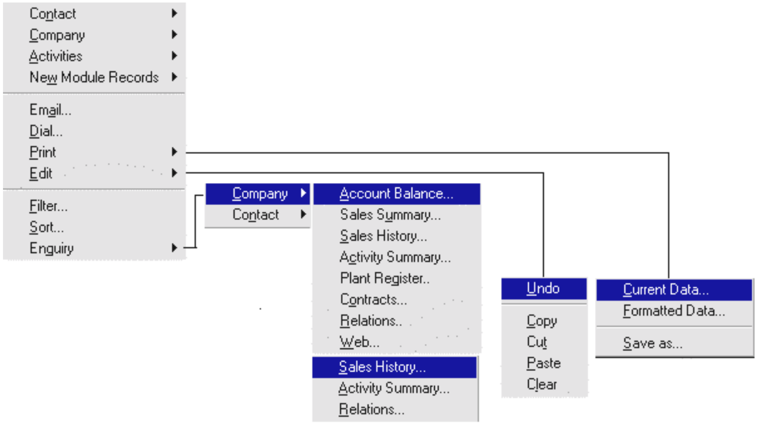
Create a new quotation.

New Order

Create a new order.

New Service

Create a new service log.



Email

This will activate the Email facilities. Refer to the Email topic for general information.

Dial

This will activate the auto dial facilities as described under the Autodial topic.

Print Sub Menu

The options on this menu allow the user to print or save the data.

Print Current Data

Click on this to print the active datawindow. The Print Function details how to print and the available options.

Print Formatted Data

Click on this to print a pre-determined format (which should have been set up by the supervisor) using the current activity record. The Print Function details how to print and the available options.

Edit Sub Menu

Selecting the appropriate option can perform the Undo, Copy, Cut, Clear and Paste functions at the field level.

Enquiry Sub Menu

This sub menu may display various enquiry options based on the site settings. The following are the typical examples.

Contact Enquiry Sub Menu

Various contact enquiries may be accessed here.

Activity Summary

The Contact Activity Summary screen is accessed.

Sales History

The Contact Sales History Query and Result window is accessed.

Relations

The Contact Relations Selection window is accessed.

Company Enquiry Sub Menu

This menu displays various company enquiry options.

Account Balance

Activates account balance screen for the company

Sales Summary

Activates sales summary screen for the company

Sales History

Activates sales history for the company.

Activity Summary

Activates company activity summary screen.

Plant Register

Activates the company plant registry search screen.

Contacts

Activates company contacts search screen.

Relations

Activates company relation screen

Web

Activates Internet explorer screen.

Statistics Sub Menu

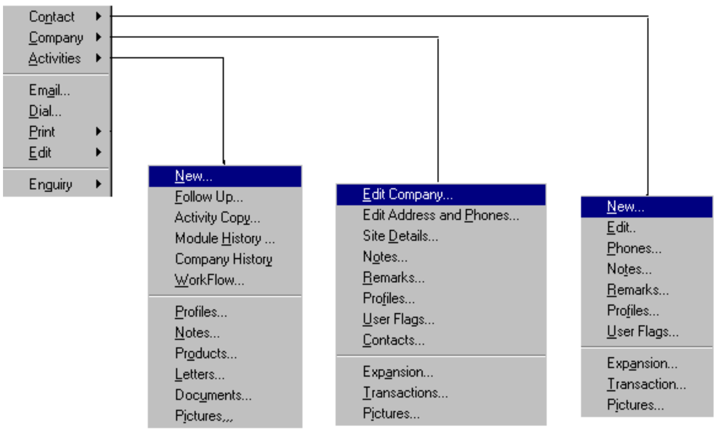
The following record statistical data is displayed.

Statistics – Row Status and Row Count

Click on one of the above menu entries display the status of the record as described under the Statistics topic.

Activity Popup Menu Options

From the Activity Maintenance window the user may right mouse click in any grey area on any Tab to obtain a list of additional functions or enquiries available:



Depending on the contact type, i.e. if the contact is Company and Employee based or purely a contact based, these details may be different.

Contact Sub Menu

The options on this menu allows the user to activate directly the Company Contact (Employee) or Contact related functions and options

New

Create a new employee record for the company or contact.

Edit

Edit selected company contact record or contact.

Phones

Display employee or contact phone numbers.

Notes

Display Employee or Contact Notes for edit or maintenance purpose

Remarks

Edit or maintain contact remarks

Profiles

Display or maintain contact profiles.

User Flags

Display or maintain contact user flags

Attach Transactions

Each contact can have many transactions attached to it as described under the Module Transactions topic.

Expansions

Additional information can be created for each contact and accessed instantaneously as described under the Module Expansion topic.

Attach Pictures

Each contact can have pictures, documents, audio and video objects as described under the Pictures topic.

Company Sub Menu

The options on this menu allows the user to activate directly the company related functions and options

Edit Company

Edit selected company record.

Edit Address and Phones

Edit selected company's address and phone details.

Site Details

Edit selected company's site details.

Notes

Display Company Site Notes for edit or maintenance purpose

Remarks

Edit or maintain company site remarks

Profiles

Display or maintain company profiles.

User Flags

Display or maintain company user flags

Contacts

Display the list if the company contacts (employees)

Attach Transactions

Each company can have many transactions attached to it as described under the Module Transactions topic.

Expansions

Additional information can be created for each Company and accessed instantaneously as described under the Module Expansion topic.

Attach Pictures

Each company can have pictures, documents, audio and video objects as described under the Pictures topic.

Activities Sub Menu

The activity related additional information and functions are maintained on this pop menu option

New

Creates a new activity for the selected Company and Contact.

Edit

Edits the selected activity.

Follow Up

Creates the follow up record after closing the existing one.

Module History

Display the activities for the module (Quotation, Order, Service etc)

Company History

Display the activities history for the company.

Workflow

Starts the Workflow display and maintenance window for the company.

Profiles

Displays the profiles list for the activity.

Notes

Displays the Notes window for activity.

Products

Displays the Product Assignment window to the activity

Letters

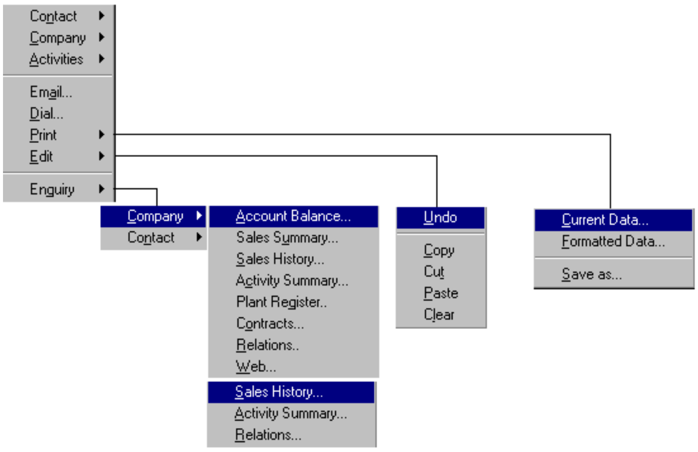
Displays the Letters Assignment window to the activity

Documents

Displays the Documents Assignment window to the activity

Pictures

Displays the Pictures Assignment window to the activity



Email
This will activate the Email facilities. Refer to the Email topic for general information.

Dial

This will activate the auto dial facilities as described under the Autodial topic.

Print Sub Menu

The options on this menu allow the user to print or save the data.

Print Current Data

Click on this to print the active data window. The Print Function Details how to print and the available options.

Print Formatted Data

Click on this to print a pre-determined format (which should have been set up by the supervisor) using the current activity record. The Print Function details how to print and the available options.

Edit Sub Menu

Selecting the appropriate option can perform the Undo, Copy, Cut, Clear and Paste functions at the field level.

Enquiry Sub Menu

Company Enquiry Sub Menu

This menu displays various company enquiry options.

Account Balance

Activates account balance screen for the company

Sales Summary

Activates sales summary screen for the company

Sales History

Activates sales history for the company.

Activity Summary

Activates company activity summary screen.

Plant Register

Activates the company plant registry search screen.

Contacts

Activates company contacts search screen.

Relations

Activates company relation screen

Web

Activates Internet explorer screen.

Contact Enquiry Sub Menu

Various contact enquiries may be accessed here.

Activity Summary

The Contact Activity Summary screen is accessed.

Sales History

The Contact Sales History Query and Result window is accessed.

Relations

The Contact Relations Selection window is accessed.

Donations

If the Call Centre Module is available the contact donations summary screen is accessed.

Loyalty

The contact loyalty points summary is displayed.

Statistics Sub Menu

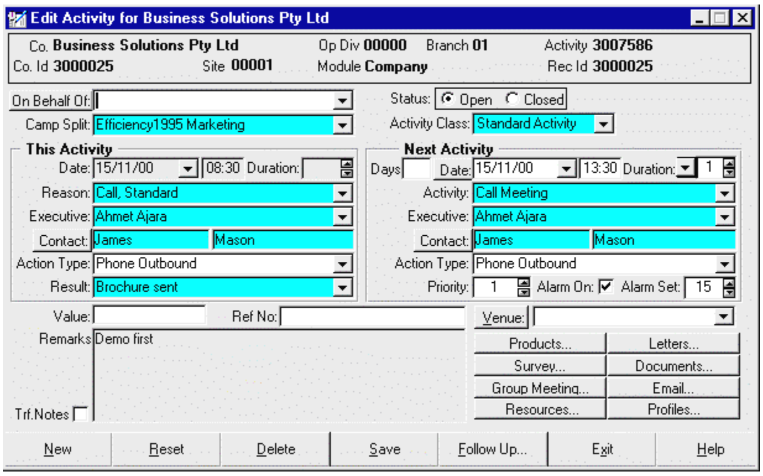
The following record statistical data is displayed.

Statistics – Row Status and Row Count

Click on one of the above menu entries display the status of the record as described under the Statistics topic.

Format the Activity Maintenance Windows

The activity maintenance window is made up of two sections, Header and details.



The header displays Company, Contact and Module codes and descriptions in a read only mode.

The detail section may display the following groups of information.

Groups	**Item Examples**
Attributes	Campaign, Mode etc
Functions	Letter, Document, Survey
Data for Action	Date, time, reason, executive
Data for Next Action	Date, time, next action, executive
Miscellaneous	Transfer Notes, Values etc

Depending on the user some of the items of the above groups may not be needed. The User Options allows the user to configure the Quick or Standard Activity Maintenance window by including or excluding the following items

Activity Normal (Quick) Entry Functions

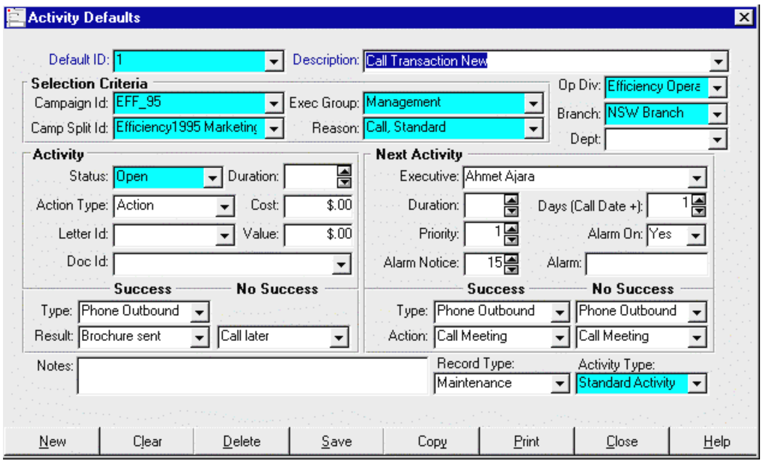
A comma separated values in a string to enable the corresponding functions or objects on the normal (quick) activity entry window.

Key Word	**Function**
HEADER	Displays Header data object
CAMPAIGN	Displays Campaign Split field
ONBEHALFOF	Displays On Behalf Of Field (Contact Activity)
MODE	Displays entry mode radio buttons
SURVEY	Displays Survey Assignment Button (Call Centre Module is required)
DELETE	Displays Delete Button
LETTER	Displays Letter Assignment Button
DOCUMENT	Displays Document Assignment Button (Document Module is required)
EMAIL	Displays Email Assignment Button (Email Module is required)
PRODUCT	Displays Product Assignment Button (Product Module is required)
PROFILE	Displays Profiles Assignment Button
ALARM	Displays Alarm Fields
TRFNOTES	Displays Trf Notes Check Box
VENUE	Displays Venue Field
GROUP	Displays Group Meeting Button
VALUE	Displays Activity Value Field

Activity Defaults

Defaults Maintenance

Activity default values are preset field values that populate when a new activity record is created or an existing one were followed up.



See the How to Use Activity Defaults topic to understand the importance of the activity defaults in the system.

Each Module has the New, Follow Up Activity defaults, and depending on the modules being installed at site the corresponding activity defaults for each user must be entered in the user's option file for the USER.

In this context the Contact, Company and Activity modules also have their own activity defaults.

Data Fields

Default Id: A unique identification code for the default.

Description: The description of the activity default.

Campaign Id: Campaign Id for the activity default.

Campaign Split Id: Campaign Split id for the activity default.

Exec Group: The executive group that can use the default.

Reason: The activity reason.

OP Div: The operating division for the activity default.

Branch: The branch identification code.

Department: The department identification code.

Current Activity (Now) Defaults

Status: The activity status flag to identify the status of the record. This should be **Open** for most activities exceptions such as 'Declined' or 'Customer does not wish to Proceed' etc

Action Type: A flag to define the action

A	Action
R	Response
M	Maintenance.

System automatically displays ‘Action’ and the user has the ability to overwrite

Letter Id: Letter ID if this Activity Transaction requires a standard letter to be sent to the Client

Letters need to have been set up within the Mail Desk Module prior to selecting from the drop down list

Doc Id: Document ID if this Activity Transaction requires a standard brochure to be sent to the Client

Documents need to have been set up within the Document Management Module prior to selecting from the drop down list

Duration: The duration of the transaction in segments of 30 minutes.

Cost: The cost of the transaction if applicable.

Value: The value of the transaction if applicable.

Call Type: Type for this Activity Transaction should be entered the same value for the successful and not successful options.

Examples could be ‘Phone Outbound’

Call Result: Result of this Activity Transaction should be entered the same value for the successful and not successful options.

Examples could be ‘Interested’.

Notes: The default activity transaction notes.

Next Activity Defaults

Executive: Next Executive this Activity Transaction will go to. If this value is left blank then the client’s account executive is used during the creation of the activity transaction.

This may be used for Enquiry purposes for each Executive to see what they have to do/follow up.

Duration: Duration of Next Activity Transaction

Days (Call Date +): Number of days from the Action Date for when Next Action has to be completed by

System will automatically calculate the Call Date and this field and display it within the Activity Transaction Next Call Date

This can be used for Enquiry purposes for each Executive to see when they have to do the follow up. System automatically displays ‘0’ and the user has the ability to overwrite

Priority: Priority for this Next Activity Transaction

The examples would be as follows:

- 1 being the Highest/Most Important
- 9 being the Lowest/Least Important

Next Activity Type: Next Activity Type for this Transaction, same value for the successful and unsuccessful options.

Examples could be Internal Meeting

Next Activity Action: What is the next action required in the Follow Up activity from the current action being completed, same value for the successful and unsuccessful options.

Examples could be Plans to Drafting

Alarm on: Y if the alarm is on.

Alarm Notice. The alarm notice.

Alarm: The path and file name of the alarm.

Record Type: The type of the record selected from the dropdown list, i.e. Action.

Leave it blank if the system is to make the selection at the time of the transaction.

Activity Type (Class): The class of the record selected from the dropdown list.

This is very important information as it affects the deletion and purging function of the activity record.

Class	Notes
Standard	General Activity can be deleted within the standard system security
Compliance	The activity may not be deleted as set in the User Shared Options.
Others	Same as standard designed to suit the operation to give more detailed analysis.

How to Use the Activity Defaults

The following is applicable for each user.

When a new activity is created or the existing activity is followed up (i.e. system closes the existing one and opens a new activity) the activity default is used by the system.

Each Module has the New and Follow Up Activity defaults and depending on the modules being installed at site the corresponding activity defaults for each user must be entered in the user's option file for the USER.

In this context the Contact, Company and Activity modules also have their own activity defaults.

Activity Module Defaults

The Activity module defaults are special and they are used either the related module activity defaults were not assigned or during the creation of activities where a specific module may not be located

In this case, there is an additional entry in the USER options under the Activity section, which is **Use Default for Activity** key word. Depending on Yes or No was entered in this field the following default functions are used during the Activity Module handling

1. If the Default Id for Standard or Quick Activity is available in the User Options' it is always used

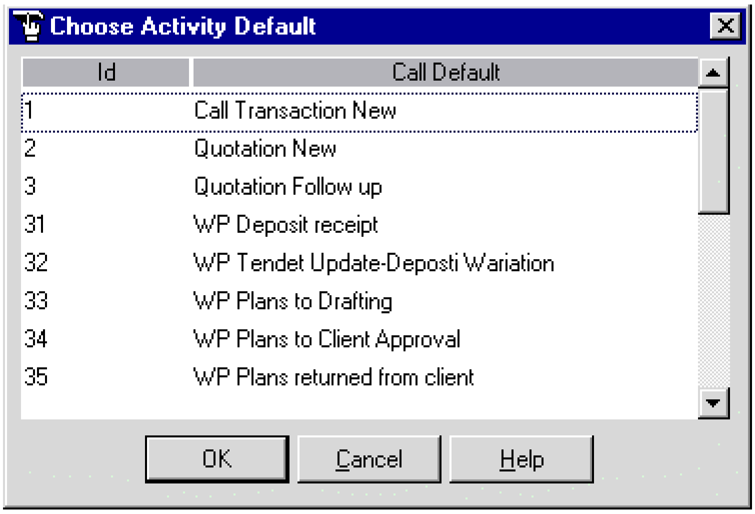
2. Then if this value is set to Yes the Activity Default file is searched for the

matching default on the:

- Campaign split
- Activity reason and
- Action executive

Activity Default Selection

During the creation of a new activity record the Defaults option from the pop up menu allows the user to change the activity default to suit the occasion.



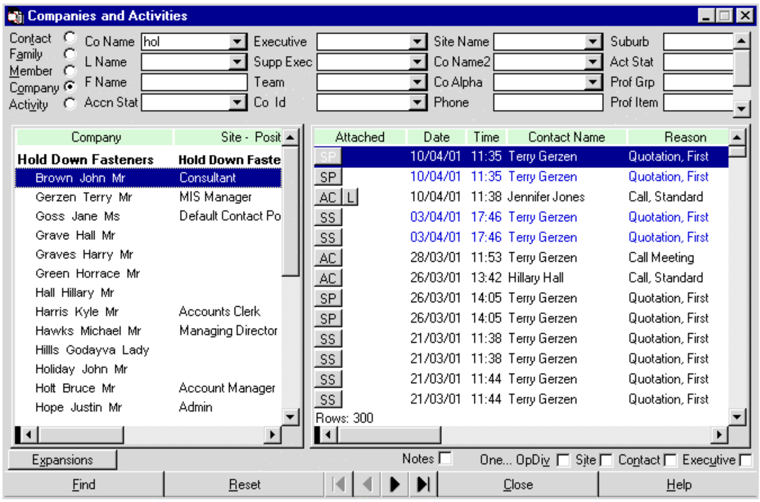
Contacts and Activities Combined

Overview

This utility allows the user to search and access the entire business via the Company - Employee – Contact records as well as their subsets such as Member and Family records and activities.

Once the record or activity is selected, the options from the pop up menu will access to all the related information.

This window can be accessed via the main menu or from any one of the schedule windows



The window is made up of six major sections.

Section	Location	Description	Options
Contact Groups	Top left	Switches the query, Contact List and Activity lists to the relevant information	Company Contact Family Membership Activity
Query	Top right	Selection criteria to result the contact and subsequently the activity result lists	Also affected by the options at the segmentation section
Contact List	Middle left	The resultant list of the query for the selected Contact Group options. Selection on the list displays the relevant activity list in the activities section	Different information based on the Contact Groups
Activities	Middle right	Activity list based on the selection on the contact list. From the activity record access to entire business.	Different information based on the contact group record type. The activity selection button at the bottom left switches to this option
Expansion	Middle Right	The related expansion and the transaction	The activity selection button at the bottom left

		records for the selected contact record will be displayed and accessed.	switches to this option. Double click on the list displays the expansion or the transaction data.
Segmentation	Bottom right	Instantly filters the contact and the resultant activity list to display the selected or all of the option elements.	One or All - Operating Division - Executive - Site - Contact

Default Set Up

When the window is activated the following default values are obtained from the user's preferences (PC's registry):

Item	**Preference**	**Options**	**Result**
Contact Group	Scheduler – Contact Options	Company Contact Family Membership Activity	Sets the contact group and the required query and display data.
Activity and Expansions toggle button.	Scheduler – Expansions	- None - Transactions - Expansions - Transactions and Expansions	Sets the Activity and Transaction selection button's functions. None=displays activities only
Populate Executive	Scheduler – Populate Exec	Yes or No	Yes = sets the logon executive in the query section
Default Team	Scheduler – Default team	Yes or No	Yes = sets the team in the query section
Populate Data	Scheduler – Populate Data	Yes or No	Yes = retrieves the contact data when the window is activated based on the default selection values.
Segmentation	System set up always to One.	One or All - Operating Division - Executive - Site - Contact	Instantly filters the contact and the resultant activity list to display the selected or all of the option elements.

Contact Options

Select the required option.

The Query, Contact List and Activity display data will be changed automatically to suit the selected option.

Query Options

Enter one or more fields to define the selection criteria for the contact and the activity lists.

Click on the Reset button to reset the query and the result lists. A new contact option selection will automatically reset these as well.

Once the query options were entered click on the Find button to display the result lists.

Account Executive and Support Executive

If any one of the fields were entered in the query section of the above window the result will be base on the 'AND' operator. On the other hand if both of the fields were populated then the result will be based on the 'OR' operator.

Activity Notes

The partial string search for the activity notes is available. Enter the partial string with the wild card i.e. '%string'

Contact List

Based on the contact group the information on this list varies.

Contact Group	List
Company	Employees of Each Company Site and Company
Contact	Contacts
Member	Members' Contact and Membership
Family	Family Members' contact details by family groups
Activity	Contact as Contacts and Employees

When a record from the list is highlighted these functions can be accessed.

- Access to entire system via the pop up menu (right mouse click on the selected item)
- Display all the activities filtered by the selection on the segmentation options.
- Create a new activity by clicking on the New Activity button
- Drag and Drop the selected contact onto the scheduler window (if it was already open) to create an appointment.

Access to the Expansion and Transaction lists by clicking on the Activity-Expansion button.

Activity List

Activity list is displayed on the middle right side of the screen for the selected contact.

The pop up menu on any selected activity record will allow accessing any related information in the system that relates to this activity directly or indirectly.

The first item on each activity item contains one or more buttons. The first item represents the type (module) of the activity and the others represent the attachments of the activity.

Click on a button to activate/link the following functions:

Button	Function
AC	Activity Maintenance
OR	Order Entry Module
QT	Quotations Module
EV	Event RSVP or Guest Maintenance
CC	Questionnaire
SP	Support Module
SS	Service Module
MM	Mail Marketing (Information Only)
WF	Workflow (Information Only)
ME	Membership Module
L	Letter
D	Document
P	Products
A	Attributes and Profiles

Activity Display Restrictions

Activities can be restricted based on the selected Activity Reason Category ID's assigned to the executives in the Supervisor Functional privileges set up option.

If the Security Log on option 4 is used, executives with these Reason Categories will not be able to see the activities for those categories.

New Module Records

A user configurable <New> command button is available on this window thus allowing direct access to the new module creation function. Other modules such as Order, Quotation, Support, and Service are still accessible from the pop up menus.

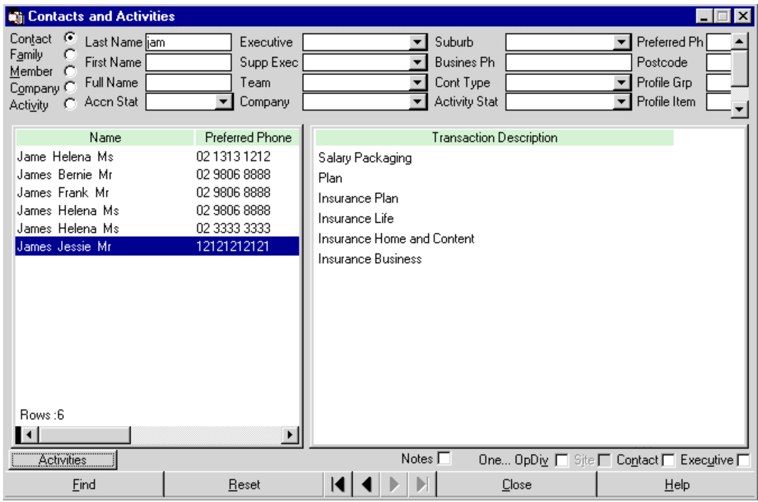
The <new entry> in the Activity section of the User Preferences <ActivityCreateNewModuleOption> allows the user to set the module that can be accessed from this command button. If the value was set to blank (None) then the button won't be displayed. The user licence or the menu accessibility function form the user maintenance also control the visibility of the command button.

Expansion and Transactions

Clicking on this button will toggle between the activity and the expansion or transaction list on the middle right side of the window

The 'One or More' option for the following check boxes can be defaulted to the settings on the user preferences

- Executive
- Operating Division
- Site Contact



Double click on any item from the list to activate the related expansion or transaction window.

Segmentation

These radio buttons will filter displayed lists for a selection or all.

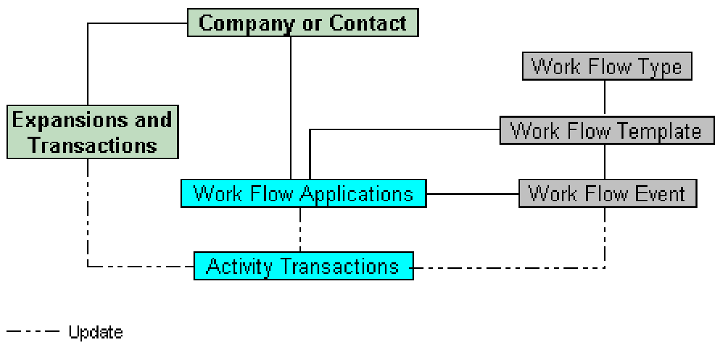
- Operating Division	- Executive
- Site	- Contact

One Contact and One Site: The defaults for these radio buttons were set in the user preferences.

Workflow Management

Overview

If one or more future activities for a company or contact are created based on pre-determined event(s) that all linked together with certain business rules the concept is called 'Work Flow'.



Each company and contact can have more than one workflow action plan. Typically a workflow action plan is made up of many events based on user defined business rules.

The Workflow system requires the following set up

Workflow Set Up

1. Set up Activity tables

- Activity Status
- Next Activity
- Activity Reason
- Activity Result
- Activity Type

2. Set up Workflow tables

1. Workflow Type	Enter here the workflow types.
2. Workflow Events:	Work Flow Event Definitions are prepared as individual events with all of the appropriate business rules and Activity Transaction Defaults. The values entered here will be used during the activity transaction creation.

3. Set Up Work Flow Templates

Workflow Templates are made of two sections, header and details. The details section holds all the events that are linked to each other various business rules.

Now the Work Flow Action Plans can be attached to any Company or Contact record from the module pop up menu.

Each Action Plan is derived from a selected Work Flow Template. At the time of the creating the Action Plan two options is available to create the event activities.

Create only the first event; the subsequent activities will be created based on the next event details of the plan when the current activity is closed.

Create all the future activities. System will follow the Work Flow Action rules in regard to the next action when the current activity is closed

Work Flow activities are completed (follow up) at the Executive Follow Up window.

The workflow activities are marked with WF attachment button. Click on this button to activate the Work Flow Follow Up window.

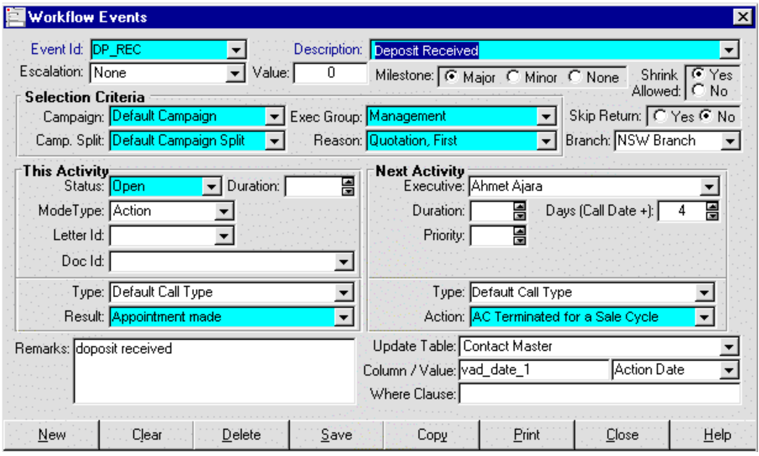
Closing of the current Work Flow activity automatically activates the business rules of the next event(s) from the Action Plan.

When the activity is closed, pre-selected values may be entered in the nominated column of the nominated table of the related Work Flow Event.

Workflow Events

This window allows the user to define the business rules and transaction defaults for each Workflow Event.

The series of events are combined to create a Workflow Template, the defaults will be for the call transactions Now and what happens Next activities.



Prerequisites

The following will have to have been set-up or to ensure that each table to have at least one record.

- Call Transactions – Next Call Action Codes
- Call Transactions - Call Result Codes
- Call Transactions - Call Type Codes
- Call Transactions – Call Reason Codes
- Executives
- Campaigns
- Branches
- Letter (If required)
- Documents (If required)

Defaults – User Preferences

The default values for the Workflow Event creation are maintained as user preferences at the Call Transactions User Preferences Tab folder.

Data Entry Fields

The Event Id and Description fields are the search fields.

Event Id: Workflow Event Identification Number. System automatically generates WEIN if the table is set to Auto Number Create Mode by the supervisor.

Description: Description of Event Definition

Escalation: Escalation Type from one of the three pre-defined types.

1. Days Over

2. Event Repeated

3. None

Value: Value of Escalation

Examples are 5 Days Over, 3 times Event can be Repeated

Milestone: Click on one of the following options:

Major	Event can not proceed with prior events NOT being Completed
Minor	This Event to be reportable but does not have the definition of the Major Milestone
None	This Event is neither a Major or Minor Milestone

If this field is clicked Minor or Major the system will automatically update the Milestone field of the related Client (Company or Contact) it is completed within the Workflow

Shrink Allowed: Click 'Yes' if this Event's number of days can be altered during the running of a workflow

Campaign Id: Select Campaign ID if Event relates to a specific Campaign. Otherwise, select the default value.

Camp Split Id: Select Campaign Split if Event relates to a specific Campaign Split. Otherwise, select the default value.

Exec Group Executive Group this Event Transaction relates to

Reason: Call Reason for this Event Transaction

Example Deposit Required

Branch: Branch this Event Transaction relates to

Dept: Department this Event Transaction relates to

Call Status: Status of Event Transaction

Should be Open for most events exceptions maybe Declined or Customer does not wish to Proceed

Call Duration: Duration of Event Transaction If applicable.

Call Mode Type: What is the mode type for this Event Transaction selected one of the following options which can be used for reporting purpose:

- Action
- Response
- Maintenance

System automatically displays 'Action' and the user can overwrite

Call Letter Id: Letter ID if this Event Transaction requires a standard letter to be sent to the Client

Letters need to have been set up within the Mail Desk Module prior to selecting from the drop down list

Call Doc Id: Document ID if this Event Transaction requires a standard brochure to be sent to the Client

Documents need to have been set up within the Document Management Module prior to selecting from the drop down list

Only used to record name or document sent to client and for stock control purposes

Call Type: Type for this Event Transaction

Examples could be Phone Outbound

Call Result: Result of this Event Transaction

Examples could be Council Approval Received

Next Call Executive: Next Executive this Event Transaction will go to. If this value is left blank then the client's account executive is used during the creation of the call transaction.

This may be used for Enquiry purposes for each Executive to see what they have to do/follow up.

Next Call Duration: Duration of Next Event Transaction

Next Call Days (Call Date +): Number of days from Call Date for when Next Action has to be completed by

System will automatically calculate the Call Date and this field and display it within the Call Transaction Next Call Date

This may be used for Enquiry purposes for each Executive to see when they have to do/follow up.

System automatically displays '0' and the user has the ability to overwrite

Next Call Priority: Priority for this Event Transaction

The examples would be as follows:

- 1 being the Highest/Most Important
- 9 being the Lowest/Least Important

Next Call Type: Next Call Type for this Event Transaction

Examples could be Internal Meeting

Next Call Action: What is the next action required in the Workflow resulting from the current action being completed

Examples could be Plans to Drafting

Remarks: Special Event Transaction Remarks If Applicable

Update Tables: One of the following tables can be updated as the workflow event was closed.

Table	Table Name
Contact Master	contact
Contact Operations	contacts
Contact Private	contprvt
Contact Expansion 1	contexp1
Contact Expansion 2	contexp2
Contact Expansion 3	contexp3
Contact Expansion 4	contexp4
Contact Expansion 5	contexp5
Contact Expansion 6	contexp6

Contact Expansion 6	contexp6
Contact Expansion 7	contexp7
Contact Expansion 8	contexp8
Contact Expansion 9	contexp9
Contact Transactions	conttran
Company Master	company
Company Site Operations	compdivs
Company Employees	contdivs
Company Expansion 1	compexp1
Company Expansion 2	compexp2
Company Expansion 3	compexp3
Company Expansion 4	compexp4
Company Expansion 5	compexp5
Company Expansion 6	compexp6
Company Expansion 7	compexp7
Company Expansion 8	compexp8
Company Expansion 9	compexp9
Company Transactions	comptran

Update Table Column: Enter here the column name of the selected table to be updated.

Note: There is no drop down list available for this function. The column name can be obtained from the report writer database tool.

Update Value: The value to be used as the update value. Select keywords for the predetermined functions.

Action Date	Sets the action date in the column
Activity Value 1	Sets the activity 1 value in the column
Increment Counter	Increments the value in the column itself

Where Clause: The additional SQL where clause to be used when the table is updated.

Command Buttons

<u>New</u>
Allows the user to enter a new Workflow Event Definition

<u>Delete</u>

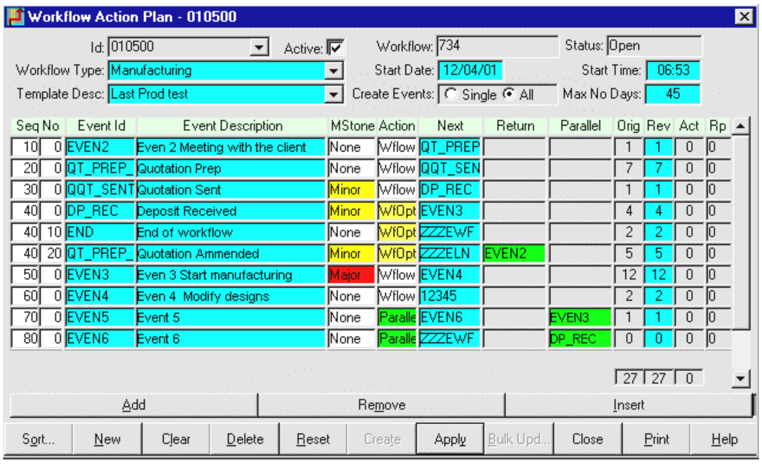
If the user has the access rights they can delete the Workflow Event Definition and the event had not already been used in any Workflow Templates or Action Plan Details

<u>Copy</u>

Allows the user to copy all the information to another Workflow Event Definition

Workflow Template

The Work Flow template window is accessed from any Activity Menu.



The function of this window is the combining of each Workflow Event into a series of Events to create a Workflow Template.

Prerequisites

The following will have to have been set-up:

- Workflow Type Codes
- Event Definitions

Template Creation Layout and Definition

W/F Template Id: Workflow Template Identification Number

System will automatically generate the Workflow Template Identification Number

Template Description: Description of the Workflow Template

Workflow Type: Template Type can be selected to group the templates together

Examples could be Pre-Deposit, Pre-Contract

The Save button needs to be clicked on completion of the above fields which will then display the bottom section of this window and allow the user to select each Workflow Event and create the actual workflow template

The user can select the Workflow Event by activating the drop down list box in either the Event ID or Event Description fields

Max No Days: Maximum Number of Days this Workflow Template is restricted to

Examples could be a Pre-Contract Workflow Template is restricted to 120 days

Remarks: Remarks or information about the Workflow Template

Seq No: The Sequence Number is displayed in two parts;

First is the main sequence number

Second is the sub-sequence number and is only used when any option type actions are used within the workflow

The sequence numbers are not used to run the workflow. However all the lines and the main option line must have the sub sequence number equal to '0'

When the Insert Button is clicked the system will add a new line with a sequence number of the line immediately before plus 1, eg Sequence number is 20 when the user inserts a line the sequence number will be 21.

When the Template is saved the Sequence numbers will be re-sequenced automatically by the system so 21 will be 30 and all the following numbers will be renumbered accordingly

PLEASE NOTE: When adding/inserting a new line following an option type action the user has to manually change the Sequence number to suit the action type of the line

Event Id: Workflow Event Identification Number

User can select either Workflow Event ID or Workflow Event Definition Description from drop down list

Once selected system will automatically display Event ID, Event Description, Milestone and Number of Days as per what was set up in the selected Event Definition

The user may change the Milestone and Number of Days

Event Description: Workflow Event Definition Description

User can select either Workflow Event ID or Workflow Event Definition Description from drop down list

Once selected system will automatically display Event ID, Event Description, Milestone and Number of Days as per what was set up in the selected Event Definition

The user may change the Milestone and Number of Days

Milestone: System will default to the milestone from the selected Event Definition

Definition of Milestone is:

Major Milestone – Event cannot proceed unless all previous Event Transactions are completed

Minor Milestone – Event is to be used for reporting purposes

None – This Event does not have any milestone

<u>User has the ability to overwrite</u>

If this field is a Major Milestone or Minor Milestone the system will automatically update the Milestone field on the Client Data Entry Screen with this Event and the date when it is completed within the Workflow

Action: How will this Event Definition work with the Workflow:

The following Action types are used within the Workflow Template:

WFlow – Main Action Items

WfOpt – This Action Item is connected with the Main Action Item but the user will be presented with a list of multiple result choices and based on the result selected the system will automatically create the next series of Events

Parallel – This Action Item will be started on the same date of the related Wflow Action

Item and will run in conjunction with other Work Flow Action Items

PrBranch – This Action Item is connected with a Parallel Action Item and will run once the previous Parallel Action Item or PrBranch Action Item is closed

PrOpt – This Action Item is connected with a Parallel Action Item or PrBranch Action Item but the user will be presented with a list of multiple result choices and based on the result selected the system will automatically create the next series of Events

Hold – This Action Item is used when the Workflow Template has been applied to a client and the Workflow needs to be stopped temporarily

Next Event: The Next Event that will be run when this event is completed.

When the 'Add' button is clicked and another Event Definition is selected the system will automatically put this Event ID into the previous Next Event Field

If this needs changing user may double click on this field to be presented with a list of Event ID's connected with this Workflow Template plus the Special System Event Definitions. The user should click on the required Event ID from the list

Definitions of Special System Event Definitions are:

ZZZELN	End of Line	Used to identify the end of a line or branch to mark the fact that this line will go nowhere
ZZZEWF	End of Workflow	Used to mark the end/completion of the Workflow
ZZZDEL	Delete Workflow	Used within the PrOpt Action Type and WfOpt Action Type to mark the fact that the work has been stopped and all the items and the related event definitions after this event definition will be deleted
ZZZCAN	Cancel Workflow	Used within the PrOpt Action Type and WfOpt Action Type to mark the fact that the work has been stopped/cancelled and all the items and the related event definitions after this event definition will be stopped but NOT deleted

Return: If a previous Event is to be repeated when this Event is completed the user must enter the Event ID in this field

The user may double click on this field to be presented with a list of Event ID's connected with this Workflow Template. The user should click on the required Event ID from the list

The system will automatically calculate the number of times this Event is repeated and compare to the Event Definition Escalation on the number of times to be repeated value. If this number is greater than allowed the Escalation business rules will be activated and the next event will be automatically sent to that Executives Supervisor

Parallel: If another Event is to be run in parallel or in conjunction with this Event the user must enter the Event ID in this field

The user may double click on this field to be presented with a list of Event ID's connected with this Workflow Template. The user should click on the required Event

ID from the list

Please Note: If the Parallel Event has follow on events then the PrBranch Action Type or PrOpt Action Type must be used

Days: Enter the maximum number of days this event has to be completed by

System will automatically default the number of days set-up in the Event Definition. The user has the ability to overwrite

If the calculated days exceed the maximum number of days determined in the Workflow a message will be displayed and the records will not be saved until they are either equal to or less than the maximum number of days

Please Note: Only the following Action Types are calculated in the total number of days;

Wflow – Workflow Main Action Items

WfOpt – Workflow Option Action Items – Only the first option of the set (with the '0' sub sequence number)

Command Buttons

The following functions are available on the command buttons.

Add

Allows the user to add a Workflow Event to the last Workflow Event

Remove

If the user has the access rights they can remove the Event Transaction within the Workflow Template

Insert

Allows the user to insert a Workflow Event in between other Workflow Events

New

Allows the user to create a new Workflow Template

Delete

If the user has the access rights they can delete the Workflow Template and updates all related tables

Reset

Resets the information being displayed back prior to any changes being made since the Workflow Template information was last saved

Copy

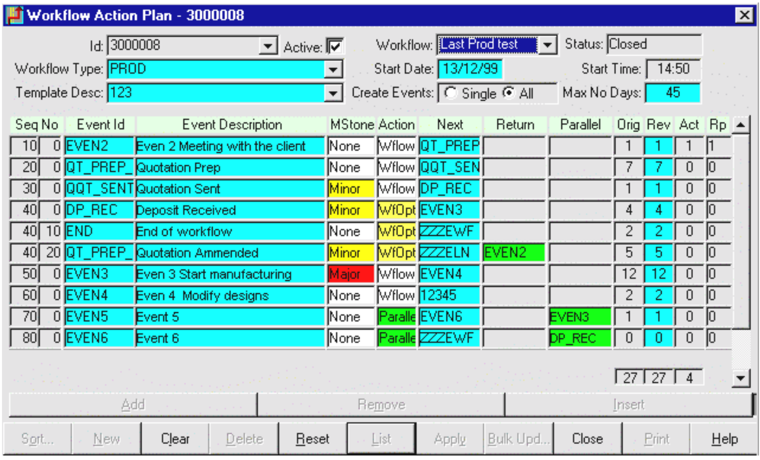
Allows users to copy all information to another Workflow Template Definition

Print

Allows the user to print a report showing the details relevant to this screen.

Workflow Action Plan

The following window is used to select a workflow template, apply the workflow to the client and make any changes/customising to the workflow, eg Client has a ritual of throwing money when concrete is poured.



This screen is also used for:

Reviewing/Enquiring about the status of a Workflow that has been applied to a client

Shrinking/Altering the remaining open events in order that the total number of days for a workflow is not exceeded

Prerequisites

The following will have to have been set-up:

Client Details (Those marked as mandatory on Screen 1) will have to have been entered

Templates need to have been created

Apply to Client Layout and Definition Details

ID: Client Identification Number

If the user had a client record in screen 1 – Client Information when they clicked the 'Create' button then this field will already be populated with the Client Identification Number

If the user did NOT have a client record in screen 1 – Client Information then they will need to select a Client Identification Number from the drop down list

Active: This will be checked if the Workflow is active

System will automatically check this field off if the Workflow is put 'On Hold', 'Cancelled' or 'Deleted'

Workflow Type: Template Type can be selected to group the templates together

Examples could be Pre-Deposit, Pre-Contract

The Save button needs to be clicked on completion of the above fields which will then display the bottom section of this window and allow the user to select each Workflow Event and create the actual workflow template. The user can select the Workflow Event by activating the drop down list box in either the Event ID or Event Description fields

Template Description: Description of the Workflow Template

Workflow: Workflow Action Plan Identification Number

This will allow more than one template to be applied to a client at a time

System will automatically allocate a Workflow Action Plan Identification Number when the 'New' button is clicked

Start Date: Date this Workflow Action Plan is to commence

System will default the system date

The user has the ability to overwrite

Create Events: Tells the system how the workflow events should be created when the template is applied to the client

Click Single if events should be created one at a time as each event is closed the next event will be created (includes

Parallel type events as well)

Click All if all the events should be created. The system will automatically adjust the next call date for future events based on the date each event is closed

Status: Status of this Workflow Action Plan

The system will automatically set the status to 'Closed' when an event is closed that has a next action of 'End of Workflow'

Start Time: Time this Workflow Action Plan is to commence

System will default the system time

The user has the ability to overwrite

Max No Days: Maximum Number of Days this Workflow Template is restricted to

Examples could be a Pre-Contract Workflow Template is restricted to 120 days

Seq No: The Sequence Number is displayed in two parts;

First is the main sequence number

Second is the sub-sequence number and is only used when any option type actions are used within the workflow

The sequence numbers are not used to run the workflow. However all the lines and the main option line must have the sub sequence number equal to '0'

When the Insert Button is clicked the system will add a new line with a sequence number of the line immediately before plus 1, eg Sequence number is 20 when the user inserts a line the sequence number will be 21. When the Template is saved the Sequence numbers will be re-sequenced automatically by the system so 21 will be 30 and all the following numbers will be renumbered accordingly

PLEASE NOTE: When adding/inserting a new line following an option type action the user has to manually change the Sequence number to suit the action type of the line

Event Id: Workflow Event Identification Number

User can select either Workflow Event ID or Workflow Event Definition Description from drop down list. Once selected system will automatically display Event ID, Event Description, Milestone and Number of Days as per what was set up in the selected

Event Definition

The user may change the Milestone and Number of Days

Event Description: Workflow Event Definition Description

User can select either Workflow Event ID or Workflow Event Definition Description from drop down list

Once selected system will automatically display Event ID, Event Description, Milestone and Number of Days as per what was set up in the selected Event Definition

The user may change the Milestone and Number of Days

Milestone: System will default the milestone from the selected Event Definition

Definition of Milestone is:

Major Milestone – Event cannot proceed unless all previous Event Transactions are completed

Minor Milestone – Event is to be used for reporting purposes

None – This Event does not have any milestone

User has the ability to overwrite

If this field is a Major Milestone or Minor Milestone the system will automatically update Screen 1 – Milestone with this Event and the date when it is completed within the Workflow

Action: How will this Event Definition work with the Workflow;

The following Action types are used within the Workflow Template;

WFlow – Main Action Items

WfOpt – This Action Item is connected with the Main Action Item but the user will be presented with a list of multiple result choices and based on the result selected the system will automatically create the next series of Events

Parallel – This Action Item will be started on the same date of the related Wflow Action Item and will run in conjunction with other Work Flow Action Items

PrBranch – This Action Item is connected with a Parallel Action Item and will run once the previous Parallel Action Item or Parallel Branch Action Item is closed

PrOpt – This Action Item is connected with a Parallel Action Item or Parallel Branch Action Item but the user will be presented with a list of multiple result choices and based on the result selected the system will automatically create the next series of Events

Hold – This Action Item is used when the Workflow Template has been applied to a client and the Workflow needs to be stopped temporarily

Next Event: The Next Event that will be run when this event is completed.

When the ‘Add’ button is clicked and another Event Definition is selected the system will automatically put this Event ID into the previous Next Event Field

If this needs to be changed the user may double click on this field to be presented with a list of Event ID's connected with this Workflow Template plus the Special System Event Definitions. The user should click on the required Event ID from the list

Definitions of Special System Event Definitions are:

ZZZELN	End of Line	Used to identify the end of a line or branch to mark the fact that this line will go nowhere
ZZZEWF	End of Workflow	Used to mark the end/completion of the Workflow
ZZZDEL	Delete Workflow	Used within the PrOpt Action Type and WfOpt Action Type to mark the fact that the work has been stopped and all the items and the related event definitions after this event definition will be deleted
ZZZCAN	Cancel Workflow	Used within the PrOpt Action Type and WfOpt Action Type to mark the fact that the work has been stopped/cancelled and all the items and the related event definitions after this event definition will be stopped but NOT deleted

Return: If a previous Event is to be repeated when this Event is completed. The user must enter the Event ID in this field

The user may double click on this field to be presented with a list of Event ID's connected with this Workflow Template. The user should click on the required Event ID from the list

The system will automatically calculate the number of times this Event is repeated and compare to the Event Definition Escalation on the number of times to be repeated value. If this number is greater than allowed the Escalation business rules will be activated and the next event will be automatically sent to that Executives Supervisor

Parallel: If another Event is to be run in parallel or in conjunction with this Event the user must enter the Event ID in this field

The user may double click on this field to be presented with a list of Event ID's connected with this Workflow Template. The user should click on the required Event ID from the list

PLEASE NOTE: If the Parallel Event has follow on events then the Parallel Branch Action Type or Parallel Optional Action Type must be used

Original Days: The maximum number of days this event has to complete.

System will automatically default the number of days set-up in the selected Workflow Template in both the 'Orig Days' (Original Days) and 'Rev Days' (Revised Days)

If the user wishes to change the number of days this can only be done in the 'Rev Days' field (Revised Days). This then provides the user with a comparison of original number of days and revised number of days

Revised Days: The maximum number of days this event has to be completed by

System will automatically default the number of days set-up in the selected Workflow

Template into both the 'Orig Days' (Original Days) and 'Rev Days' (Revised Days)

If the user wishes to change the number of days this can only be done in the 'Rev Days' field (Revised Days). This then provides the user with a comparison of original number of days and revised number of days

If the calculated days exceed the maximum number of days determined in the Workflow a message will be displayed and the records will not be saved until they are either equal to or less than the maximum number of days

Please Note: Only the following Action Types are calculated in the total number of days;

Wflow – Workflow Main Action Items

WfOpt – Workflow Option Action Items – Only the first option of the set (with the '0' sub sequence number)

Act Days: Actual number of days this event has taken to be completed

System will automatically update this field as each call transaction is closed

Repeat: Actual number of times this event has been repeated. System will automatically update this field as each call transaction is closed

Workflow Template History

Will provide a history of what Workflow Templates have been applied to this Client. Information will be Client Id, Template Type,

Template Description, Executive who applied the template, Start Date of Template

Command Buttons

Add
Allows the user to add a Workflow Event to the last Workflow Event

Remove

If the user has the access rights they can remove the Event Transaction within the Workflow Template

Insert

Allows the user to insert a Workflow Event in between other Workflow Events

Sort

Allows the user to sort all the remaining events with a status of open by number of revised days with the highest number being displayed first. The user may change the number of revised days and click the 'Save' system will then resort the events by sequence number.

PLEASE NOTE: Only the events pre-set with 'Shrink Allowed' can be changed

New

Allows the user to create a new Workflow Template

Delete

If the user has the access rights they can delete the Workflow Template and updates all related tables

Resets

The information being displayed back prior to any changes being made since the Workflow Template information was last saved

Create

System will list the events for the selected Workflow Template

Save

System will create the call transactions for each event based on which Create Option was selected:

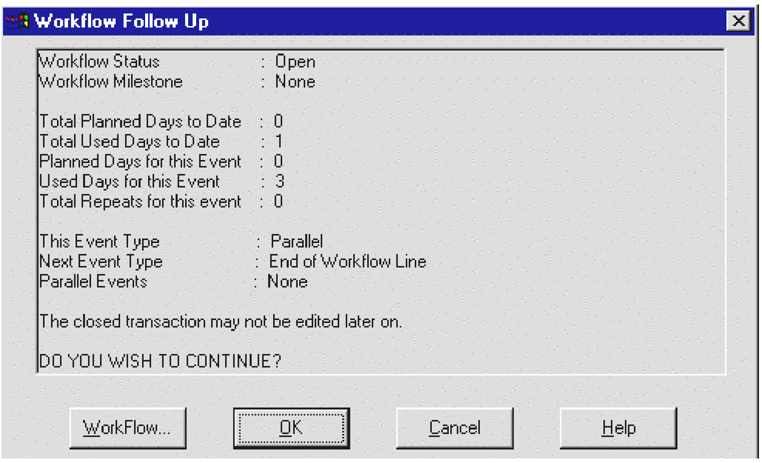
- **One at a time** as each event is closed the next event will be created (includes Parallel type events as well)
- **All** if all the events should be created. The system will automatically adjust the next call date for future events based on the date each event is closed

Print

Allows the user to print a report showing the details relevant to this screen.

Work Flow Action Follow Up

You can close any due Workflow transaction from the Executive Follow Up window or from any Activity Maintenance window.



The function of this screen is to complete (Close) the current Workflow event (activity) and do one of the following:

- Commence the next workflow event (Activity)
- Put the Action Plan to ‘On Hold’, ‘Cancelled’ or ‘Deleted’
- Adjust/Review future Workflow events

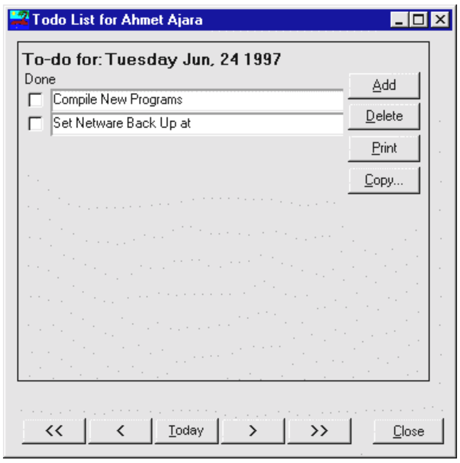
To Do Management

Executive To Do Options

Efficiency provides two very different To Do maintenance function for the Executive. The activity-based tasks are maintained under the Activity Management module.

Personal To Do List

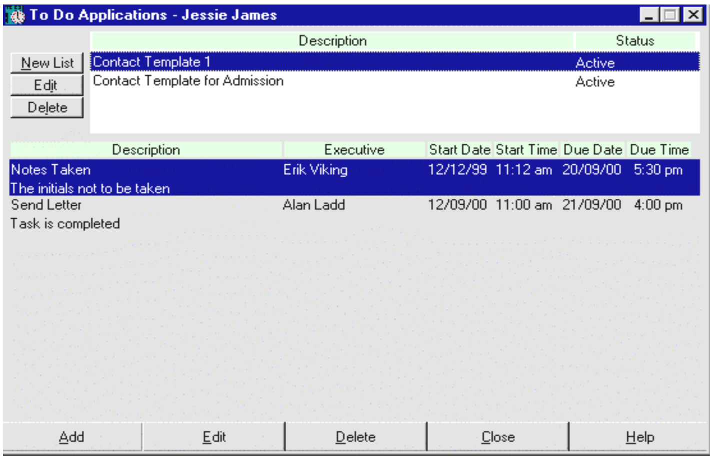
The Personal To Do List is designed to be used by the executives to maintain their personal reminders, notes and tasks at the scheduler levels.



Business To Do List

If there's a need to set various tasks and To Do items for a module record this can be done using the To Do function.

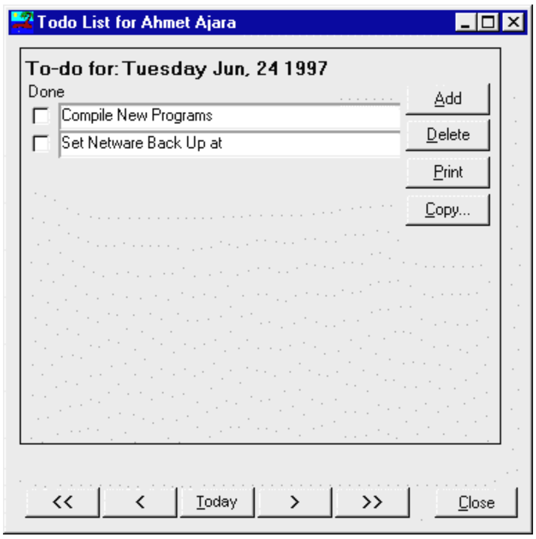
This option should not be confused with the Activity Transactions and Personal To Do Lists. A To Do item relates to purely a task to be completed to achieve a result. For example, the following To Do items can be assigned an Event



Personal To Do

This window allows the user (executive) to maintain the executives private to do list.

It is accessed from the Bar menu or from the Daily or Weekly Scheduler Display Windows or from the "Call and Schedular" icon bar.



Command Buttons and Functions

The following functions are provided:

Add

Click on this command button to add a new line to the list.

Delete

Click on this command button to remove a line from the list.

Print

Click on this line to print the list

Completed

Click on the <Done> check box to mark the completed tasks.

Copy

If you wish to copy the “Yesterday’s” or “All Previous” uncompleted To Do history, click on this button. The following To Do List Copy Over Window is displayed.

The following buttons will display the previous or the feature dated lists:

Today	Today
<	Previous Day
>	Next Day
<<	Previous Week
>>	Next Week

Global Purge

The global purge function is available at supervisors clean up utility.

To Do List Copy Over Window

The previous To Do lists can be copied over to today's list selectively.

To Do List Copy Over

Yesterday: All the non-completed (unchecked) to do list lines will be added to the displayed list.

All Previous: All the non-completed (unchecked) to do list lines will be added to the displayed list.

Business To Do Overview

If there is a need to set various tasks and To Do items for a module record this can be done using the To Do function.

This option should not be confused with the Activity Transactions and Personal To Do Lists. A To Do item relates to purely a task to be completed to achieve a result. For example the following To Do items can be assigned an Event

- Send Invitations
- Prepare Name Tags
- Book Venue
- Organise Hotels
- Organise Projector
- Organise Refreshments
- Check parking facilities.

Of these To Do Lists set of Activities will be generated by the system when the invitations were sent and the RSVP were entered.

Each executive may keep the Personal To Do lists as their personal reminders etc. Personal To Do lists are usually accessed from the scheduler windows.

Efficiency Modules

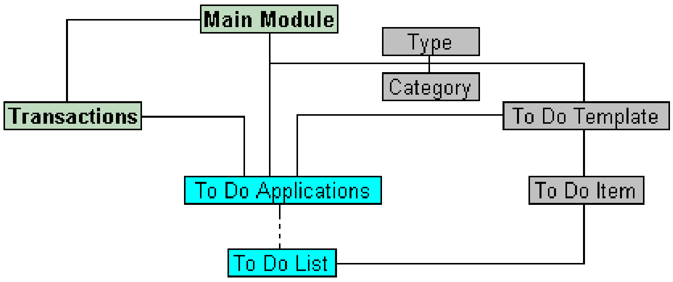
To Do lists can be assigned to any records of the following modules.

Module	Module Id
Campaign	CP
Campaign Split	CP2
Campaign Transactions	CP3
Company	CU
Company Transactions	CU3
Contact	CO
Contact Transactions	CO3
Contract	SC
Contract Transactions	SC3
Document	MD
Document Transactions	MD3
Event	EV
Event Split	EV2
Event Transactions	EV3
Executive	EX
Executive Transactions	EX3
Knowledge Base	SR
Mail Desk	MM
Order Entry	OR
Plant	PL
Plant Transactions	PL3
Product	PR
Product Transactions	PR3
Quotation	QT

Quotation Transactions	QT3
Service and Maintenance	SS
Service Transactions	SS2
Support Desk	SP
Support Transactions	SP2
Vendor	VE
Vendor Transactions	VE3

To Do Function

The To Do functions is summarised on the following diagram.



Each module record can have more than one To Do List. Typically, a To Do List is made up of many To Do items.

The To Do system requires the following set up

To Do Set Up

1. Set up To Do tables

1.	To Do Type	Enter here the To Do types.
2.	To Do Category	Enter here the To Do Categories.
3.	To Do Items	Enter here the To Do Items and related data.

2. Set Up To Do Templates

To Do Templates is made of two sections, header and details. The details section holds all the To Do Items

After setting the Templates, the To Do List(s) can be attached to any record of the above modules from the module pop up menu.

Each To Do List is derived from a selected To Do Template. At the time of the creating the To Do List, the items can be removed or added to the list as required.

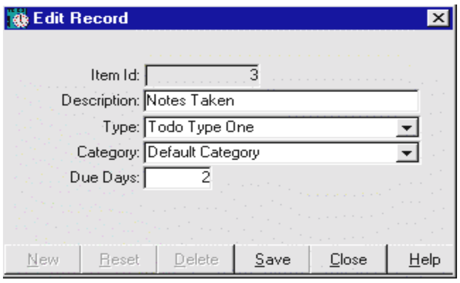
The To Do List maintenance is activated from the pop up menu of the module.

The completion date, time, remarks and the Executive who had completed the task are the common information that requires to be maintained.

The To Do menu item or Icon starts the general enquiry window where the To Do Lists can be maintained globally.

To Do Item

To Do items are maintained on this window.



Fields

Description: **Enter here the To Do Item description or edit the description.**

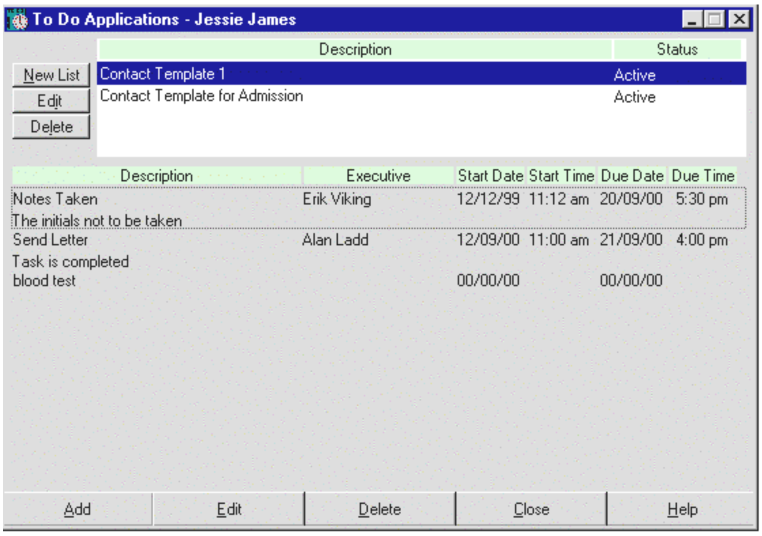
Type: Select the to do type that this item belongs to.

Category: Select the to do category that this item belongs to.

Due Days: Enter here the default value or edit the current value.

To Do Application

When the To Do option is selected from the Activities menu of the Pop Up menu the following To Do Application window is displayed.



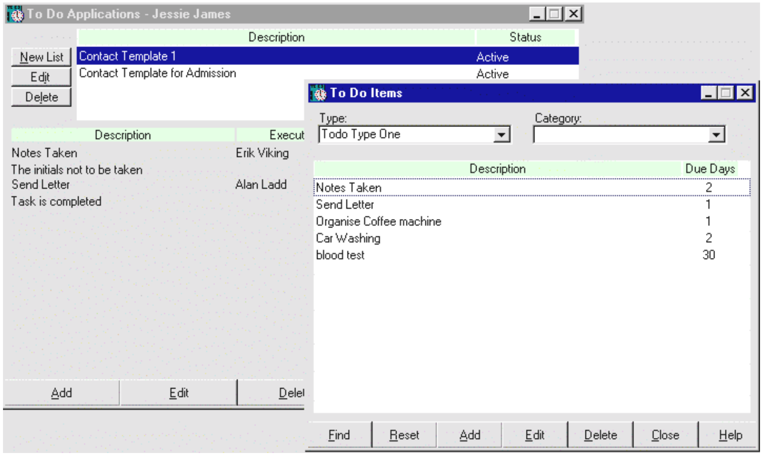
The top section of the window displays all the To Do Applications assigned to the selected module record.

There are three buttons at the top left side of the window to perform the following functions.

<u>New</u>

Click on this button to create a new To Do Application by attaching one of the existing To Do templates that are available for this module.

The Template List will be displayed.



Command Buttons and Functions

Select a template and drag it to the application header. System will display the template list at the bottom window.

<u>Edit</u>

Highlight the To Do Application and click on this button. The To Do Maintenance Application window will be displayed and you can edit the application details on this window.

<u>Delete</u>

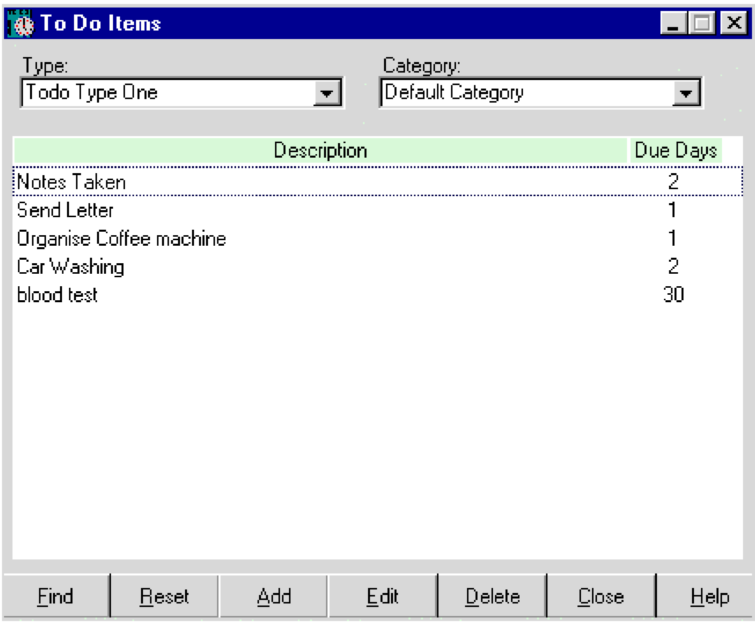
Click on this button to delete the To Do Application and the List.

<u>To Do Application List</u>

The bottom section of the window displays all the To Do items within the application. You can Add, Edit or Delete the displayed items.

<u>Add</u>

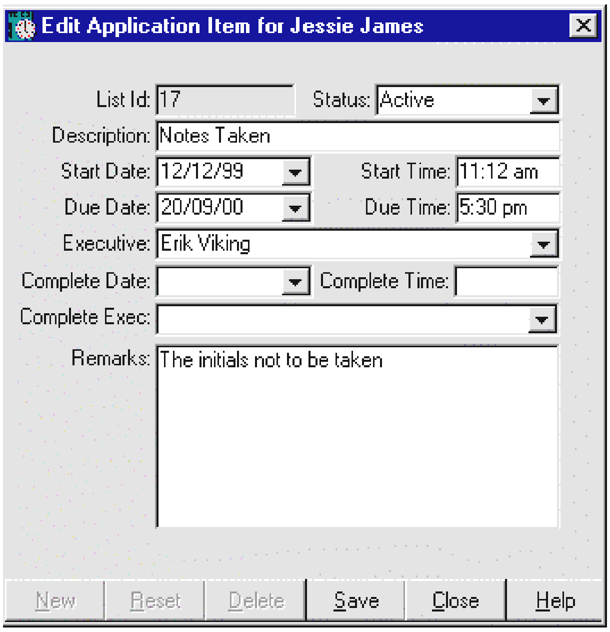
Click on this button to select another to do item from the list and add to the application.



Select an item and drop on to the Application List window. The new item should be edited by clicking on the Edit button.

<u>Edit</u>

Click on this button to edit the highlighted To Do Item.



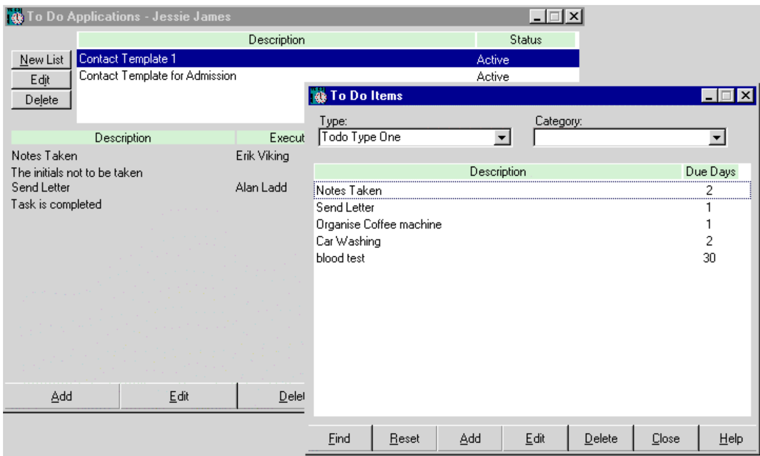
Delete

Click on this button to delete the highlighted To Do item.

To Do Application Templates List

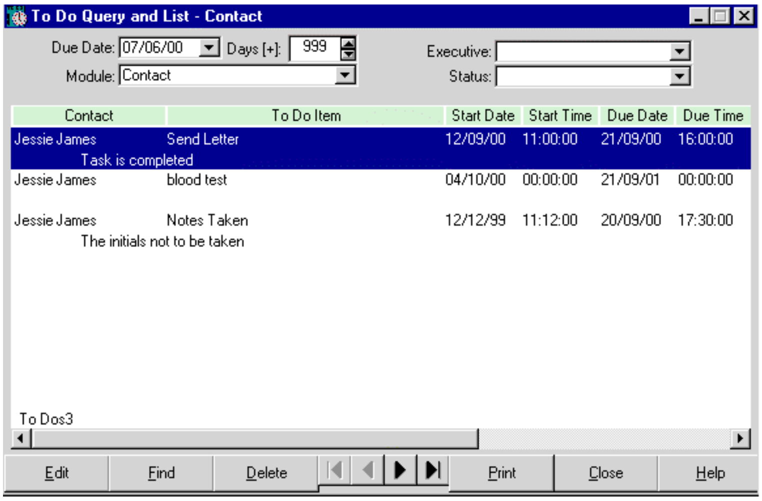
The available and active templates for the module are displayed on the list.

To select an item highlight it and then drag it on to the window where the new template is to be inserted.



To Do Query and List

This window lists the selected To Do items based on the selection criteria entered at the top section of the window.



Query Options

Use the following query options to refine the list selection criteria.

Due Date

Enter here the beginning of the Due Dates.

Days +

Enter here the number of days to limit the end date of the due days.

Modules

Select one of the valid modules or sub modules or leave it blank for all.

Executive

Select an executive who is responsible of the To Do items or leave it blank for all the executives.

Status

Select an appropriate status to display.

Edit To Do Item

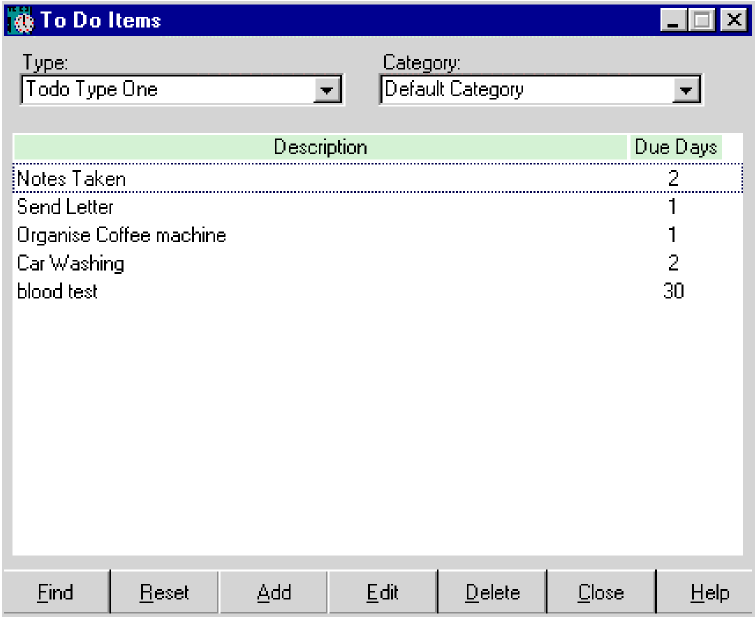
Highlight the item and click on the Edit button. The To Do Application List maintenance window will be displayed to maintain the item.

To Do Items

The To Do items are held in the todoitem table and maintained on the following window.

To Do Items are grouped by the To Do Category and To Do Type Attributes.

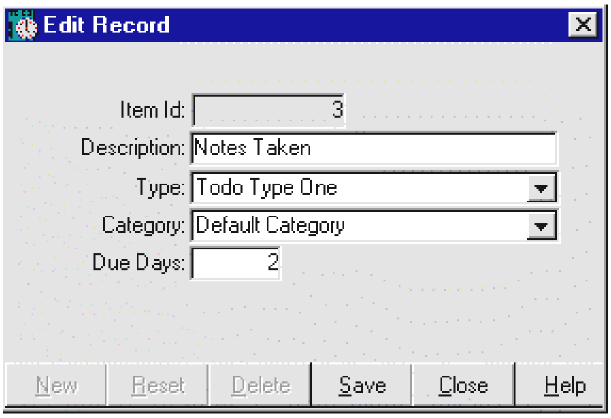
Select the Category and Type values before Find or Add functions as these values are used as part of the To Do Item record.



Add or Edit

Click on this button to add a new to do item to the database for the selected Category and Type.

Click on this button to edit the highlighted To Do Item.



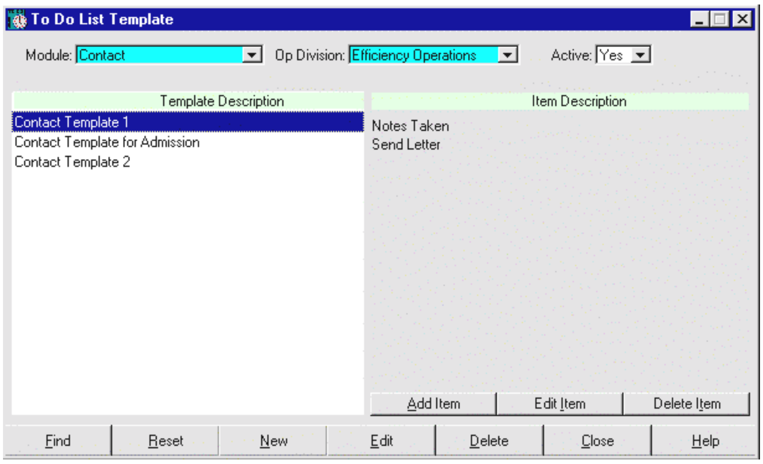
Delete

Click on this button to delete the highlighted To Do item.

To Do List Template

Sets of Templates for various reasons can be prepared. The most suitable template is assigned as To Do Application(s) to the selected module records. The list is then edited to suit the exact requirements.

Here the Templates are created and maintained. The templates are made of headers and lists



Templates are grouped by category and type attributes.

The top section of the window is used to set the criteria for the template headers by entering the required category, type and status values. Then click on the Find button to display the Header and the List.

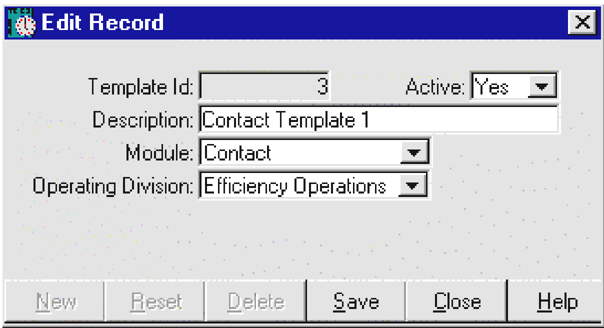
The selection of a template on the left side of the window displays the related To Do items of the template on the right side of the window.

The command buttons at the bottom row relates the to the Header records and the buttons at the upper row controls the Items.

New or Edit

Click on this button to add a new template header.

Click on this button to edit the highlighted To Do template.

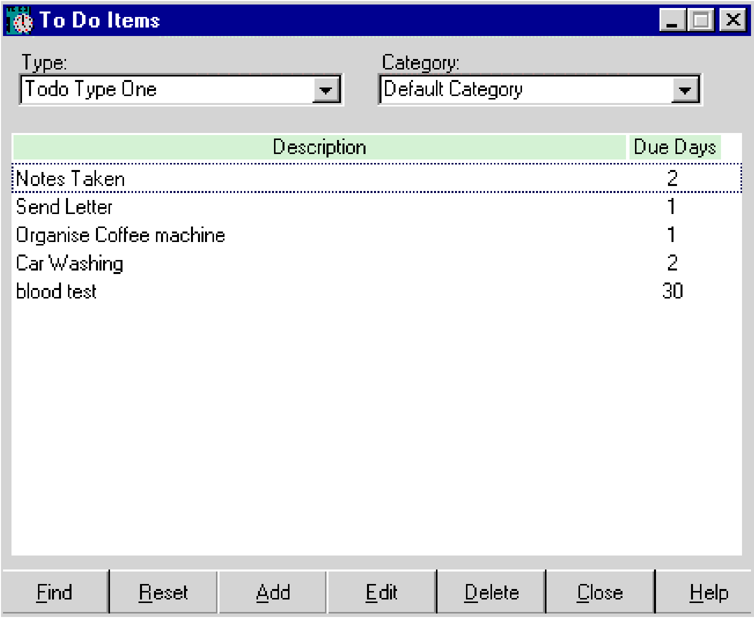


Delete

Click on this button to delete the highlighted To Do template header and items.

Add Item

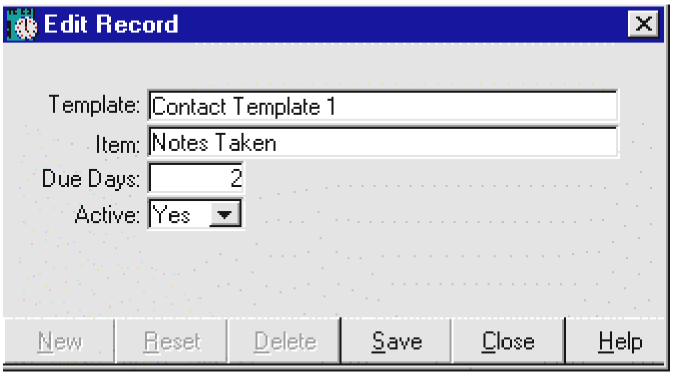
Click on this button to select another to do item from the list and add to the template.



Select an item and drop on to the template items List window. The new item should be edited by clicking on the Edit button.

Edit Item

Click on this button to edit the highlighted To Do template item.



Delete

Click on this button to delete the highlighted To Do template item.

To Do Application Maintenance

To Do applications are maintained on this window.

Description

Enter here the To Do Application description or edit the description.

Active

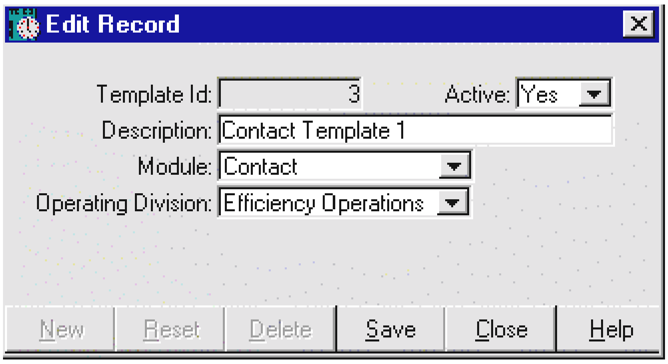
Only the active applications can be used

Status

Enter a valid and appropriate status.

To Do Template

The template details are maintained on this window



Description

Enter here the To Do Template description or edit the description.

Active

Only the active templates can be used.

Module

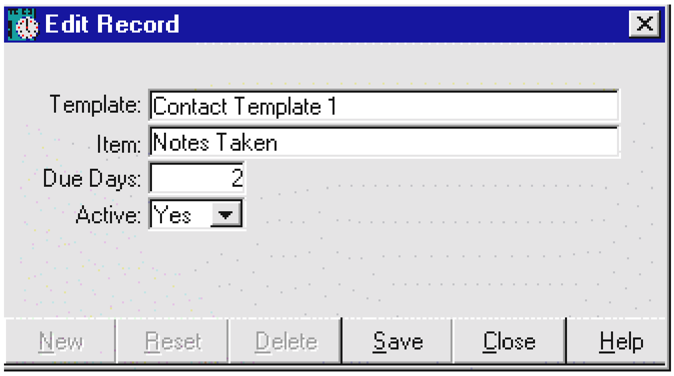
Select a module from the drop down list to attach the template to.

Operating Division

Select an Operating Division from the drop down list to attach the template to.

To Do Template Lines

The To Do items for a template is maintained on the following window



To Do Application List

Template

The template to which this item belongs to is displayed by the system.

Item

Enter here the To Do Item description or edit the description.

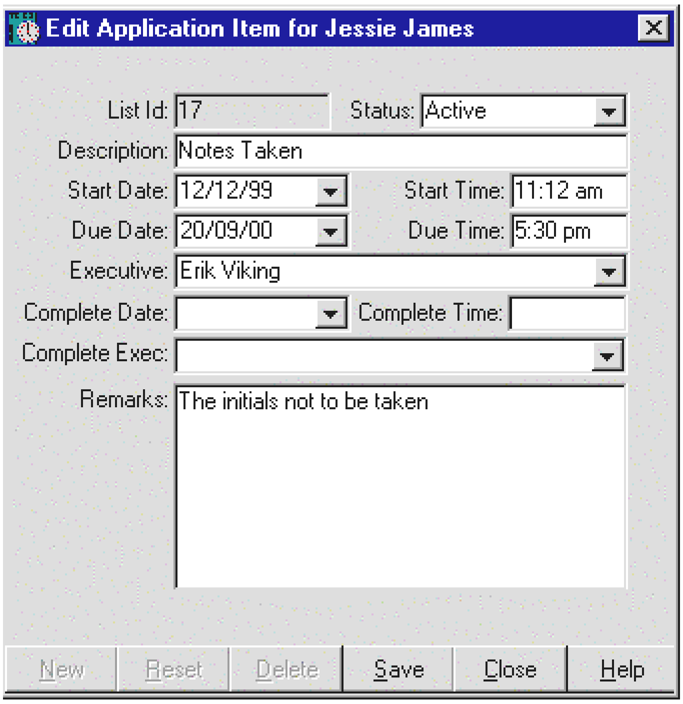
Due Days

Enter here the default value or edit the current value.

Active

Only the active items can be used in the lists.

Maintain here the To Do Application list item



Status

Select an appropriate status from the dropdown list. The ‘Closed’ status is used to indicate the completion of the task.

Description

Description of the task is defaulted to the To Do item description and can be modified.

Start Date and Time

The starting date and time of the task.

Due Date and Time

The expected completion date and time of the task. This date is important as it is used to select the bulk To Do lists.

Executive

The executive who is responsible the successful completion of this task.

Complete Date and Time

The completion date and time of the task.

Complete Executive

The executive who had signed off the successful completion of this task.

Remarks

Notes, remarks and details of the task.

Diary and Scheduler

When the external schedulers such as MS Outlook, Notes and Group Wise were used all the Efficiency activity and scheduling data are maintained in parallel. However, only the activity scheduling can be updated from the external schedulers.

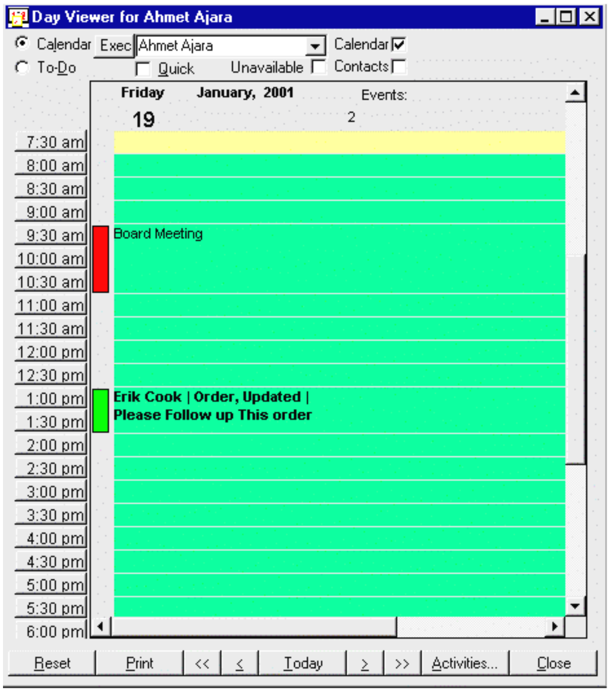
If the appointment was made by a person who does not have access rights to the next action executive's external scheduler then an email message with the summary data will be send to the next action executive's email address.

The following should be set in the Shared Options:

Send Email on Scheduler Error=Yes or No

If the <Create External Schedule For Existing Activity> entry in the Activity section of the Shared options was set to Yes, an external scheduler record will always be created

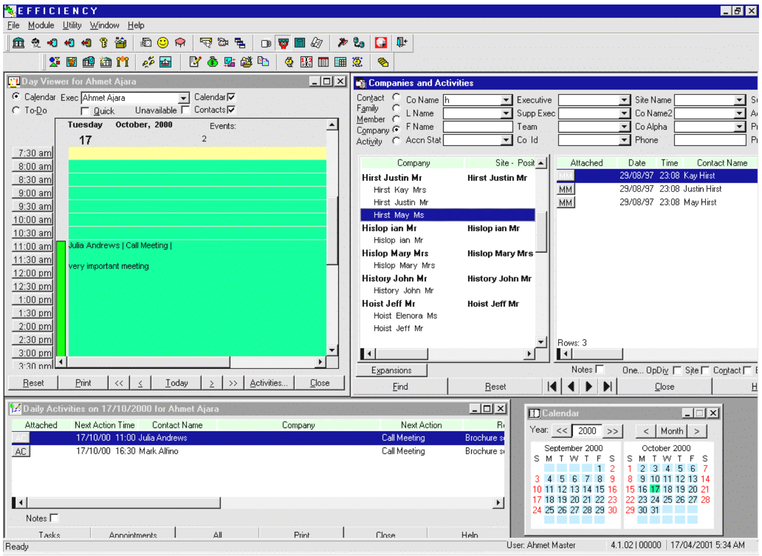
Daily Scheduler



Calendar and Contacts Click on these check boxes to display/close the calendar and the combined contact windows.

Activities Click on this button to display/close the Daily Activities window

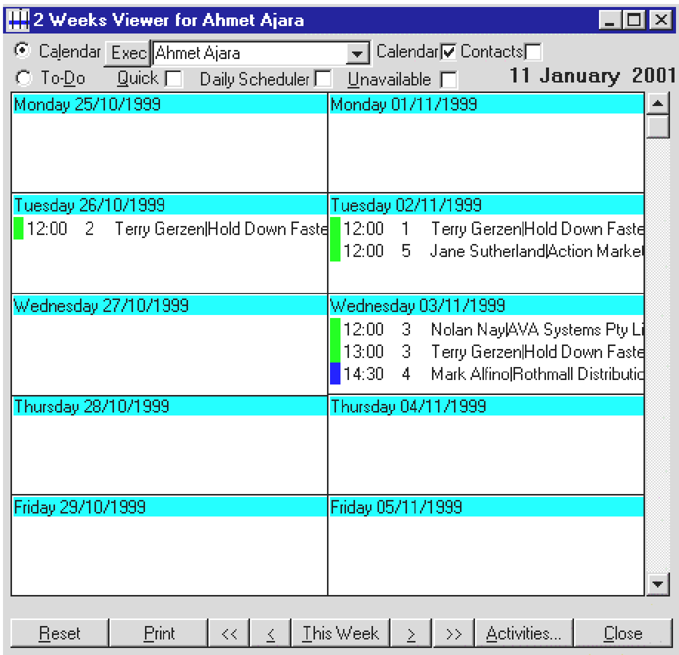
Unavailable Click on this check box and then click on the executive time to set the executive unavailability as described on the Executive Availability topic.



External Meetings

Select and drag a contact from the combined contacts window and drop it on to the requestor executive's time. Edit the activity record as described on the Activity Maintenance topic.

Weekly Scheduler



Display and Handling of Holidays

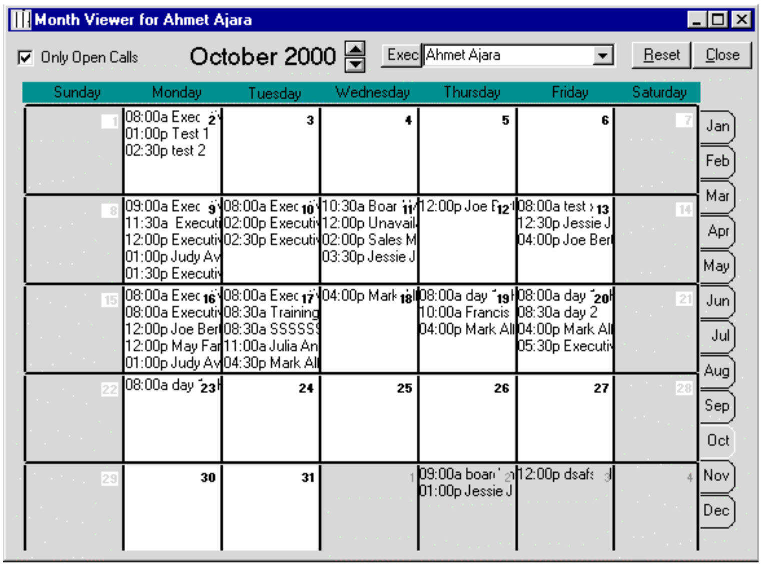
The Public Holidays that was entered against Country and State have the following functionality.

The colour that was set in the user preferences for holidays will be displayed on the Weekly schedulers.

The Activity and Executive Availability Copy over function for the re-occurring meetings will ignore the holidays (based on the holidays set against the Country or State of the Executive's branch).

The Monthly scheduler is displaying the holiday as line entry..

Monthly Scheduler

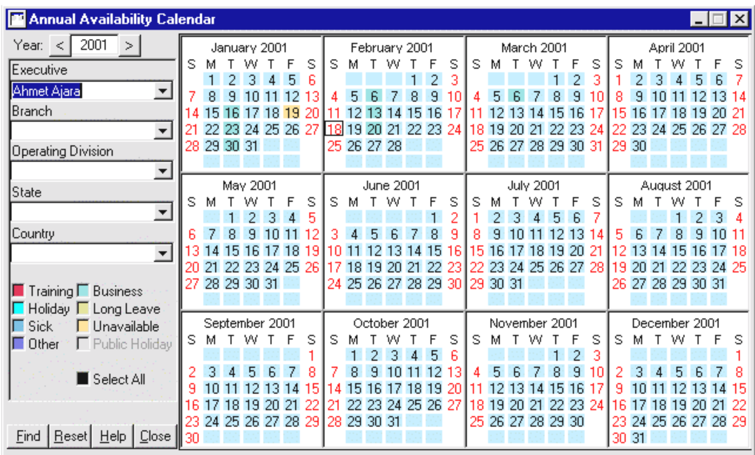


Annual Availability Calendar

The unavailable dates for the following entities can be recorded in the system

Level	Public Holidays	Long Leave	Unavailable	Buss	Train	Holiday	Sick	Other
Executive		X	X	X	X	X	X	X
Branch								X
Operating Division								X
State								X
Country	X							X

The following window is where the dates are maintained



<u>Year</u>

Use the arrows to locate the appropriate year.

<u>Entities</u>

Select one or group of entities (state via country etc) to assign the unavailable dates.

<u>Unavailable Day Types</u>

Check the suitable box for the unavailable day types.

Each time a new criteria was entered it is required to click on the Find button to refresh the previously assigned dates on the monthly calendars.

The colours were set in the user preferences utility.

Add Data

To add a new date or date ranges follow these steps.

1. Click on Reset
2. Select one or more related entities
3. Select one or more (single is preferred) day types
4. Click on Find button
5. Click on the one day or beginning and the end dates of the range
6. Click on right mouse click on the selected date
7. Click on the Add option of the pop up menu
8. Proceed with the assignment as described on the Add availability Record topic.

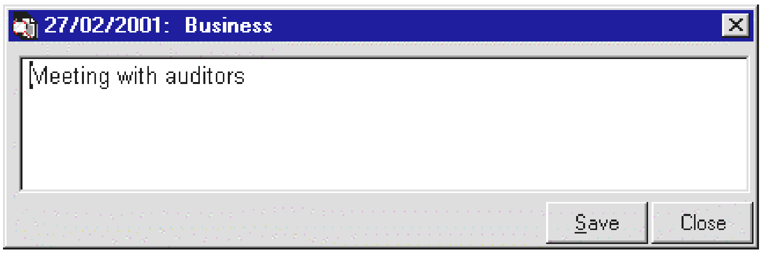
Delete Data

Select the data and click right mouse click on the date to be deleted. Select the delete option from the pop up menu.

Follow the delete process as described on the Executive Availability Delete topic.

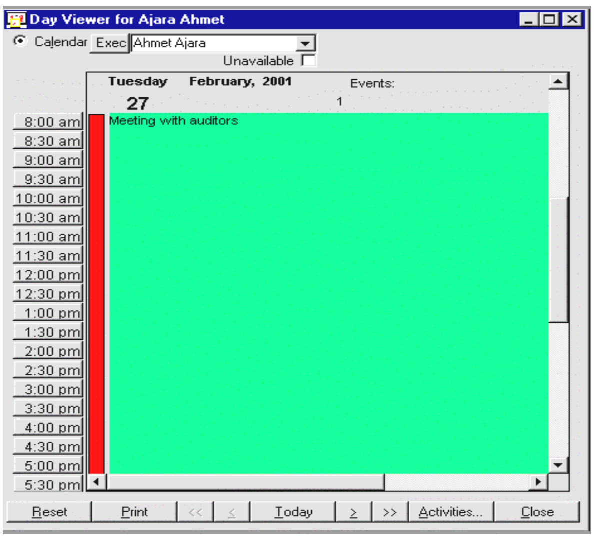
Display Data

Select the data and click right mouse click on the date to be displayed. Select the display option from the pop up menu. The details of the unavailable date will be displayed on the following window.



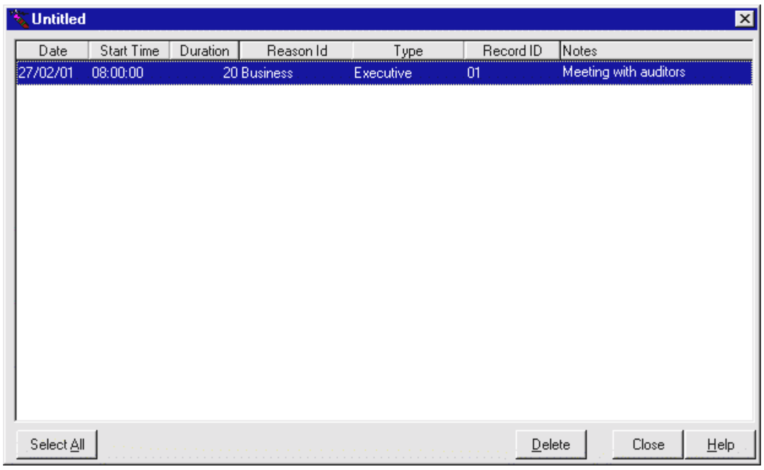
Day Viewer

Select the data and click right mouse click on the date to be displayed. Select the Day Viewer option from the pop up menu. The daily scheduler view of the unavailable date will be displayed on the following window



Executive Availability - Delete

One or more days, depending on the date being selected on the Annual Availability Calendar will be displayed on the following window



Use Ctrl + Enter to select individual dates or click on the Select All button to select the whole list.

Click on the Delete button to delete the selected records.

Add Availability Record

The details of the unavailable date(s) are entered on this window.

Group

Select a group to apply.

The details of the group item will be enabled adjacent to the selected group item.

For Example: if the Executive Group was selected the dropdown field will be enabled to select the executive.

Type

Depending on the group selected one or more types will be enabled. Check in the required type.

Description

Enter the details of the date(s) here i.e. Queen’s birthday can be entered as a public holiday.

Dates are Start and End Dates

If the dates were clicked on the Annual Availability window was a range then click on this check box to indicate that the dates were the start and the end dates of a range.

In this case the unavailability will be recorded for all day.

Single Day

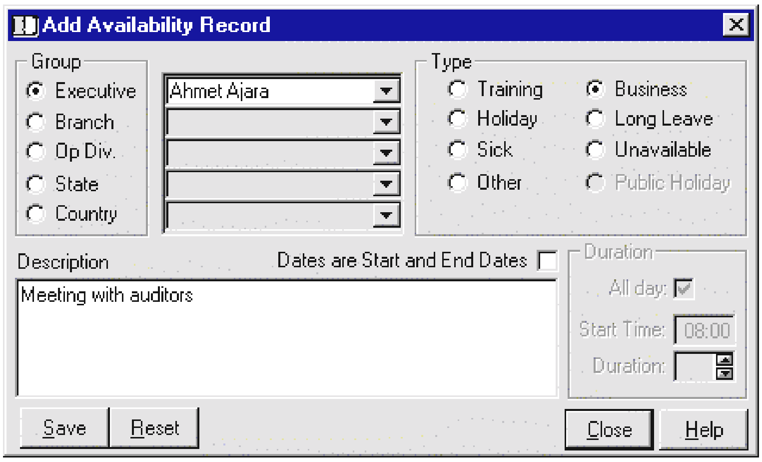
If the selection was a single day the following fields can be entered in the duration area.

All Day

Click on this box if the day is to be booked as all day.

Start Time and Duration

Enter a start time and duration, increment of 30 mins, i.e. 3 means 90 minutes.



Group Scheduler

On this window the meetings for the group of executives can be arranged, edited and copied over to other executives.

This is function is a visual function, although the over booking will be announced; system will not attempt to stop the multiple bookings. The resources and venues cannot be over booked.

Requestor Executive

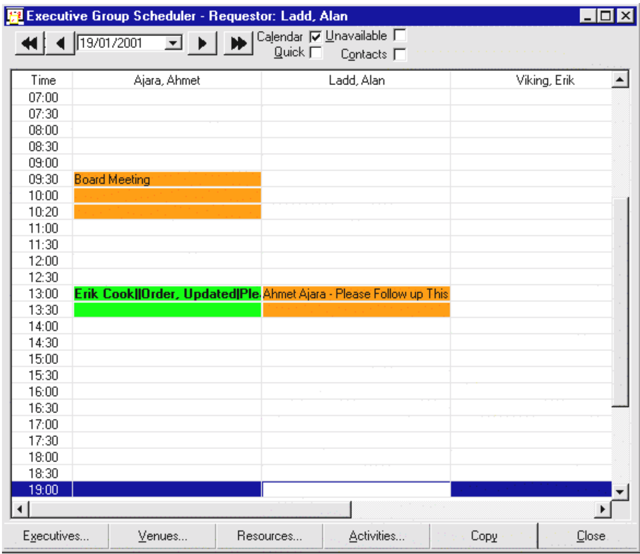
Either the first executive on the grid or the highlighted executive is considered the requestor of the subsequent group meetings.

If a Team was assigned on the user preferences utility, this window is displayed with the members of the team and their appointments for the day.

If you wish to change the executives, click on the Executive button and select the executives as described on the Select Executive topic.

Venues

Click on this button to display the allocated venues as described on the Venue Allocation topic.



Resources

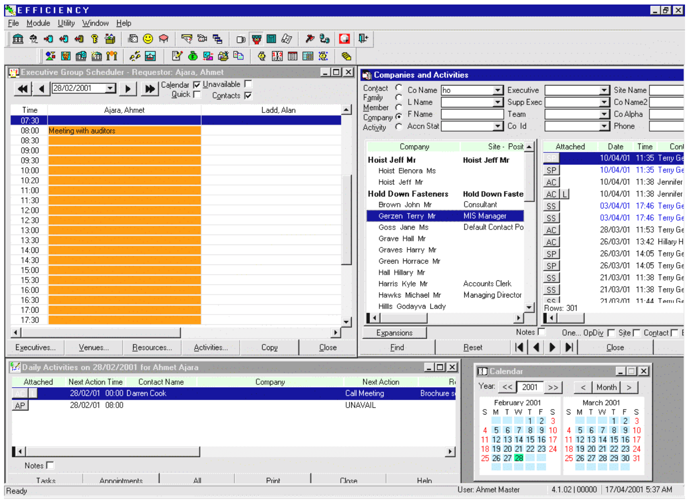
Click on this button to display the allocated resources as described on the Resource Allocation topic

Calendar and Contacts

Click on these check boxes to display/close the calendar and the combined contact windows.

Activities

Click on this button to display/close the Daily Activities window

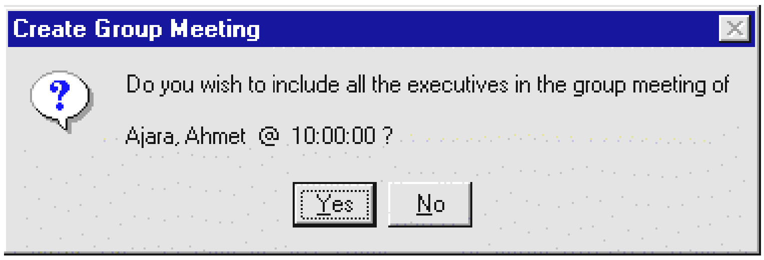


Unavailable Click on this check box and then click on the executive time to set the executive unavailability as described on the Executive Availability topic.

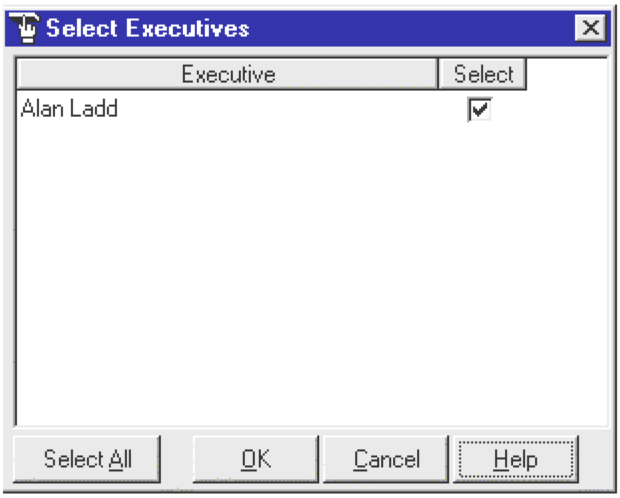
External Meetings Select and drag a contact from the combined contacts window and drop it on to the requestor executive's time. Edit the activity record as described on the Activity Maintenance topic.

Copy To copy an appointment to other executives do the following.

1. Please remember this is a visual utility, be sure the appointment spaces are available for the executives or the multiple appointments are acceptable.
2. Use the executive button and re-select the executives on the grid if required.
3. Click on the Requestor Executive
4. Set the External or Internal appointment; assign venues and resources as normal.
5. Click on the Copy button. System will request the confirmation of the action



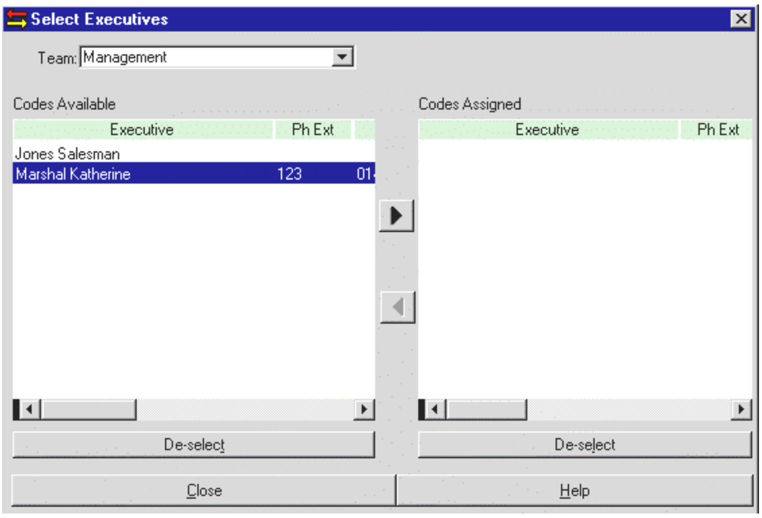
System displays a selection list of the executives from the grid on which you cam remove some of the executives from the copy action.



You can repeat this process as many times as required for the different grids as long as the original requestor was included in the grids.

Select Executives

This window is used to select executives.



If a Team was assigned in the user preferences utility the team field will be populated with the value and the executives for that team sill are displayed on the left side of the window.

If all the executives are to be listed then blank the Team window and press the Tab key, all the executives will be displayed on the right side.

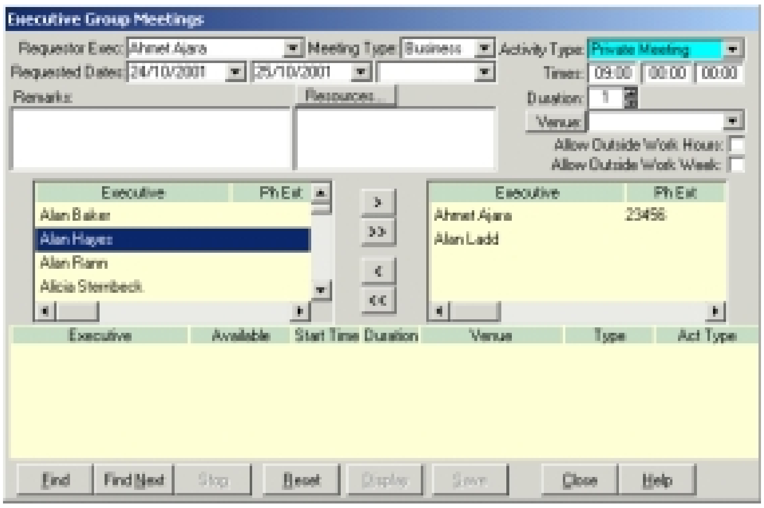
Click on the executives on the left side and click the right arrow in the middle to move the selected executives to right side. Alternatively, remove them from right box to the left.

If the selection is final click on the close button to bring the selected executives to the calling group scheduler window.

Executive Group Meetings

This program allows the scheduling of a group meeting either by a requesting executive or on behalf of an executive.

After selecting the requesting executive, other meeting details may be entered. These are: Meeting Type, Activity Type, Remarks, Resources, and Venue.



Up to three requested dates and times may be entered along with the meeting duration. The schedule of the requesting executive and all other selected executive schedules will be check one selected date at a time for all selected times.

After each date is checked, a window will popup showing the result of the search.

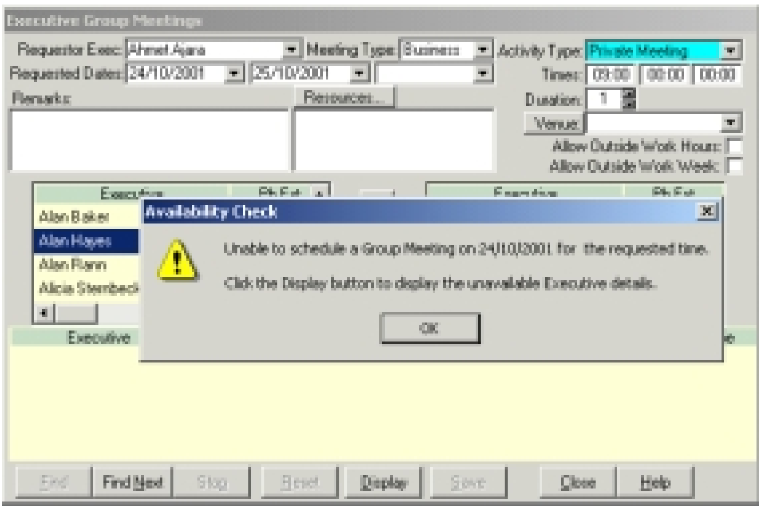
In this example, the requesting executive is Ahmet Ajara and another executive Alan Ladd has been selected. Two dates 24/10/01 and 25/10/01 have been entered with a start time of 9:00 am.

The program will first check both executives' schedule to see if they are available at 9:00 am on the 24/10/01. If this time is not available then a check will be done for 25/10/01.

Normally as a date or time is entered, they are checked and will be disallowed if they fall outside of the normal days/time. If it is required to allow scheduling of meetings at these times, two check boxes will disable these checks.

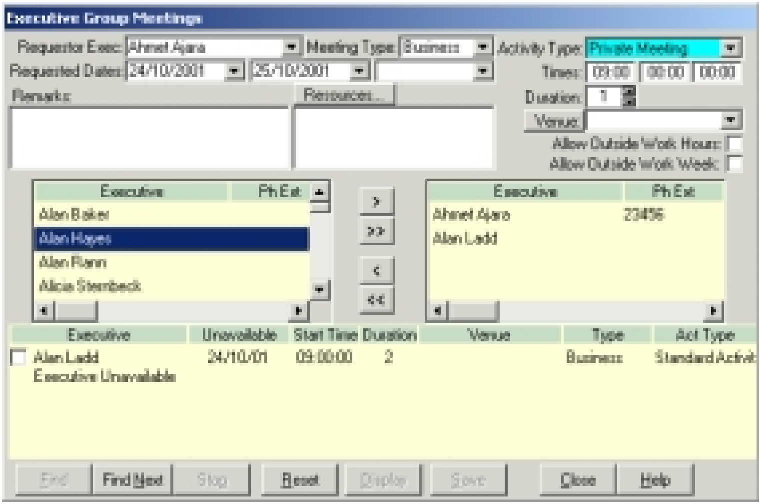
The Find key is clicked to begin the search the schedules for the first date and each selected time.

If any executive is unavailable then a popup window will appear as follows:



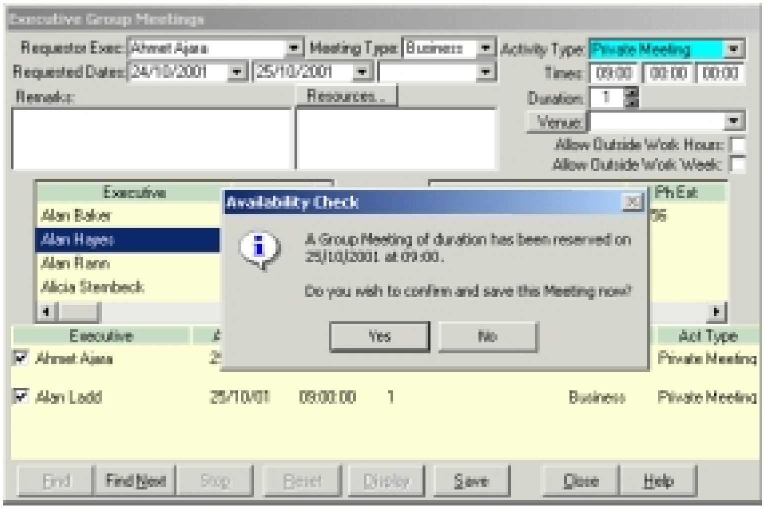
After clicking OK, your choices at this stage are to either click the display button to display the unavailability details or to click the Find Next button to check again using the next date and selected times.

In the following example the Display button is clicked. As we can see Alan Ladd is unavailable at 9am on the first selected day due to an existing meeting.



If this Executive is required at this date and time, the Executive can be double-booked for this meeting by clicking on check box next to his name and clicking the Save button.

If the Find Next button is clicked, then the next date is checked. Here we see that the next selected date and time is free for both executives.

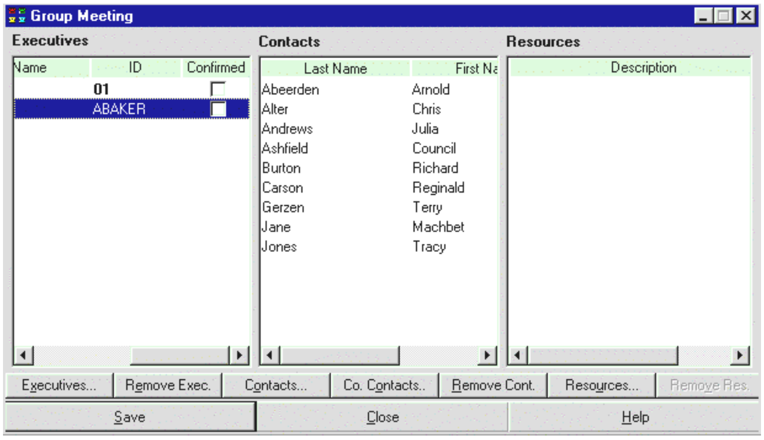


If we have checked all dates and times as configured above without finding a suitable date and time, clicking Find Next will search sequentially through the schedules looking for the FIRST AVAILABLE date and time. As each is displayed, you may either accept the selection or continue the search by clicking the Find Next button

Create and Maintain Group

The following window is displayed when the Group Meetings button was clicked either on the Activity Maintenance or the Executive Availability windows.

Meetings



The name of the requestor and the main contact are already listed on the window.

The following participants and resources can be added or removed from group meeting:

Executives- Click on the Executives button to activate the Executive Search Window to add executives to the group meeting. On this window you can click the OK button or drag and drop the selected executives.

Select executive(s) and click on the Remove button to remove executive(s) from the group meeting. Only the requestor can remove the executives.

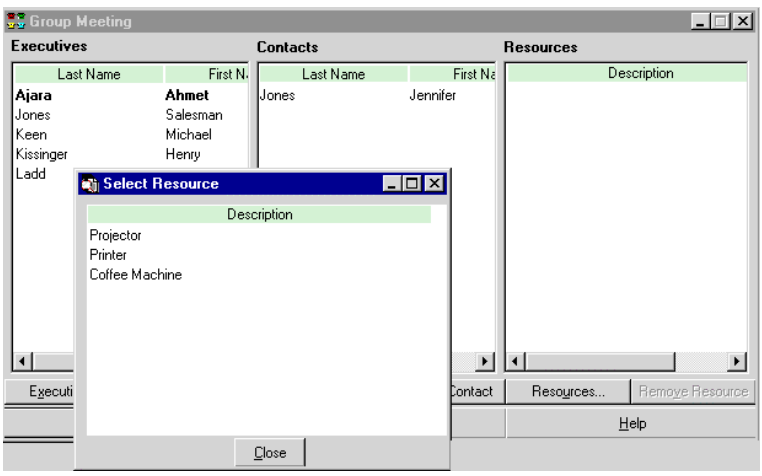
Contacts- Click on the Contacts or Company Contacts (Employee) button to activate the Search Engine Window for the contacts to add other contacts to the group meeting. On this window you can click the OK button or drag and drop the selected contacts.

Select contact(s) and click on the Remove button to remove contact(s) from the group meeting. Only the requestor can remove the contacts.

Company Contacts – Click on this button to pop up the company contacts search window will allow to include the company contacts (could be from multiple companies) in the contact group meeting list.

Appointment Confirmation: The Executive list has a Confirmed column at the end to display all the confirmed and unconfirmed appointments

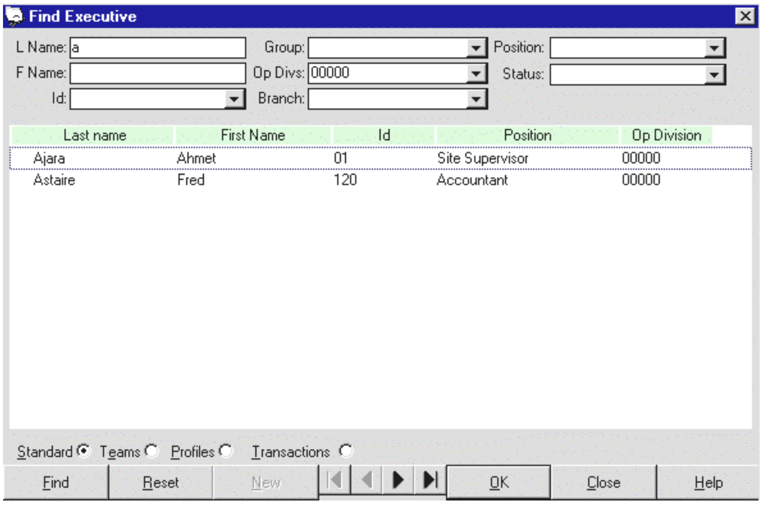
Resources- Click on the Resources button to activate the following window to add resources to the group meeting. On this window you can click the OK button or drag and drop the selected resources.



Select resource(s) and click on the Remove button to remove resource(s) from the group meeting. Only the requestor can remove the resources

Executive Search

This window is accessed from the Group Meeting Preparation window in order to select the participant executives to attend an external or internal meeting.



There are two sections on this window. You can enter any selection criteria in the top Query section and click on <Find> button, the matching results set will be displayed in the second window. Highlight the required record and click on the OK button to return to the Main window with the selected member record.

If the name or the description was fully or partially entered in the main window before clicking on the search button the search engine will be seeded with this value and the corresponding result set will be displayed automatically.

Radio Buttons

Standard
Standard search

Profiles

Search for executives with profiles.

Teams

Search for executives by teams.

Transactions

Search for the executives with transactions.

Command Buttons

Find
After entering the query criteria, click on this button to display the executive list.

Reset

Resets the selection criteria.

Left and Right Arrows

To switch from one product to another in the executive search list.

OK

Select executive(s) and click on this button to return the selected data to the calling window.

You can also use the drag function of the mouse to drop the selected data on to the calling window.

Close

To close the search engine screen.

Help

Activates the help screen relevant to this section

Reports and Enquiries

Reports

Efficiency basic system is provided with various Activity Management reports.

User can design any number of activity reports using the InfoMaker report writer. A blank report library named ‘CALLRPTS.PBL’ is provided under the ‘Reports’ subdirectory of each client.

How to set up reports in InfoMaker is found under the InfoMaker Reports Set Up topic.

- Activity Reports
- Activity History (Calls Made) Report
- Missed Calls Report
- Activity Follow Up Report

Enquiries

The following interactive activity history and follow up enquiries are available.

Executive Activities History

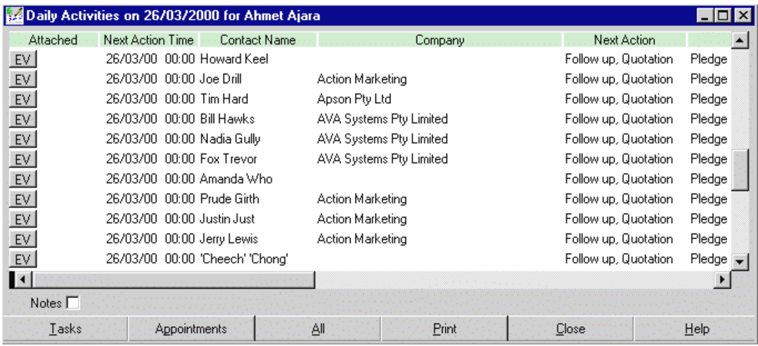
Executive Activities History Window allows the user to access the selected activities for one or for all the executives. Once the activities were listed, the pop up menu will lead the user to access to all the related information and functions of Efficiency.

This window contains two overlaid data windows one is used for Query and the other is used for Listing of the results.

When the window is started the query data window is populated with the default values that were set in the User’s preferences.

The Query Data Window

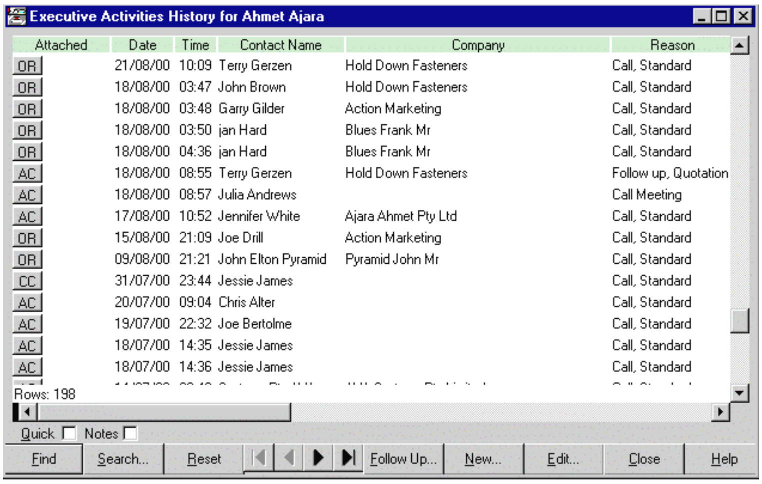
The Search Button will activate this window.



Once the selections were entered click on the Find button to display the new result set or click on the List button to display the current list in the window.

The Result (List) Display Window

The result of the query is displayed on this window



Activity Display Restrictions

Activities can be restricted based on the selected Activity Reason Category ID's assigned to the executives in the Supervisor Functional privileges set up option.

If the Security Log on option 4 is used, executives with these Reason Categories will not be able to see the activities for those categories.

New Module Records

A user configurable <New> command button is available on this window thus allowing direct access to the new module creation function. Other modules such as Order, Quotation, Support and Service are still accessible from the pop up menus.

The <new entry> in the Activity section of the User Preferences <ActivityCreateNewModuleOption> allows the user to set the module that can be accessed from this command button. If the value was set to blank (None) then the button will not be displayed. The user licence or the menu accessibility function form the user maintenance also control the visibility of the command button.

Attached

The first item on each activity item contains one or more buttons. The first item represents the type (module) of the activity and the others represent the attachments of the activity.

Click on a button to activate/link the following functions:

Button	Function
AC	Activity Maintenance
OR	Order Entry Module
QT	Quotations Module
EV	Event RSVP or Guest Maintenance
CC	Questionnaire
SP	Support Module
SS	Service Module
MM	Mail Marketing (Information Only)
WF	Workflow (Information Only)
ME	Membership Module
L	Letter
D	Document
P	Products
A	Attributes and Profiles

Pop Up Menu

Notes

Check this box to display the notes (remarks) of each activity. Uncheck the box to condense the list without notes.

Quick

This box toggles between the Standard and Condensed (Quick) activity maintenance window.

Activity Details

Double click on the highlighted line to activate the Activity Maintenance window. Clicking on the Edit button or selecting the Edit option from the Activity section of the Pop Up Menu achieves the same result.

New Activity

Highlight a line item and click on the New button or select the New option from the Activity section of the Pop Up menu. Passing the related data from the selected line item will create a new activity and the Activity maintenance window is displayed.

Follow Up an Activity

Click on this button to follow up the highlighted activity. System will warn you that the current activity will be closed and a new one will be created by using the Follow Up Activity Defaults from the User's Options. Following the confirmation of the action the newly created activity will be displayed.

Right mouse click on a selected line item or pressing Alt+F1 will pop up the Pop Up Menu. Depending on the content of the site licence user can access all the functions and options of Efficiency. The following are typical.

Contact

Access the details, functions and options of Employee (Company Contacts) of the selected activity.

Company

Access the details, functions and options of Company and Site of the selected activity.

Activity

Access the details and attachments of the selected activity as well as drilling down the specific activities of the Company, Contact or the module record. The Workflow and TO Do lists for the Company or Contact is also accessed from this option.

Email

Start Email session the email to the contact or a selected recipient.

Filter, Sort

Start Filter or Sort functions.

Print

Print current window, formatted data or save as functions can be selected.

Dial

The auto dial window is displayed by listing all the available phone numbers for the contact of the activity

Enquiry

Depending on the content of the activity record Contact or Company sub menus are displayed from which all the standard enquiries are accessible.

Executive Activities Follow Up

Executive Activities Follow Up Window allows the user to access the selected activities for one or for all the executives. Once the activities were listed, the pop up menu will lead the user to access to all the related information and functions of Efficiency.

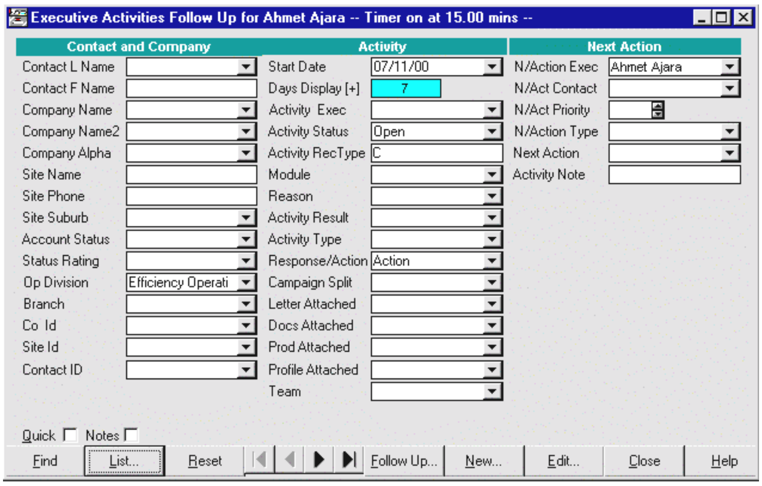
This window contains two overlaid data windows one is used for Query and the other is used for Listing of the results.

When the window is started the query data window is populated with the default values that were set in the User's preferences.

If the refresh timer was set to a value in the user preferences the list refreshes automatically at the set intervals.

The Query Data Window

The Search Button will activate this window.



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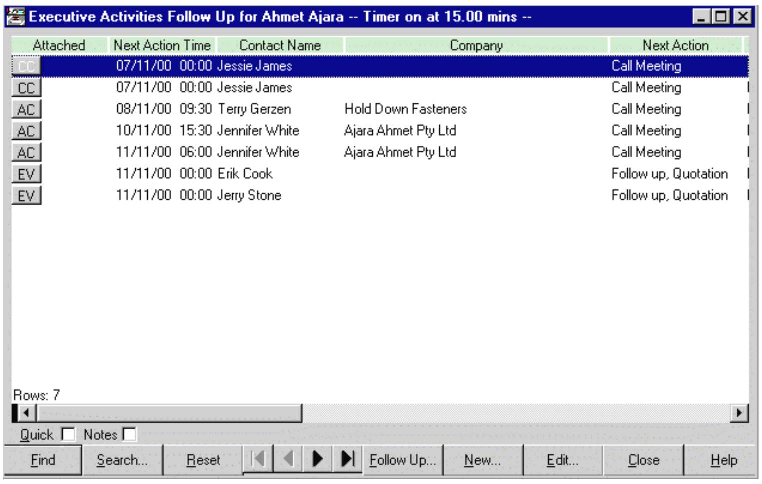

<u>Notes</u>

Check this box to display the notes (remarks) of each activity. Uncheck the box to condense the list without notes.

<u>Quick</u>

This box toggles between the Standard and Condensed (Quick) activity maintenance window.

Activity Details

Double click on the highlighted line to activate the Activity Maintenance window. Clicking on the Edit button or selecting the Edit option from the Activity section of the Pop Up Menu achieves the same result.

New Activity

Highlight a line item and click on the New button or select the New option from the Activity section of the Pop Up menu. Passing the related data from the selected line item will create a new activity and the Activity maintenance window is displayed.

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Click on this button to follow up the highlighted activity. System will warn you that the current activity will be closed and a new one will be created by using the Follow Up Activity Defaults from the User's Options. Following the confirmation of the action the newly created activity will be displayed.

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The first item on each activity item contains one or more buttons. The first item represents the type (module) of the activity and the others represent the attachments of the activity.

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Button	Function
AC	Activity Maintenance
OR	Order Entry Module
QT	Quotations Module
EV	Event RSVP or Guest Maintenance
CC	Questionnaire
SP	Support Module
SS	Service Module
MM	Mail Marketing (Information Only)
WF	Workflow (Information Only)
ME	Membership Module
L	Letter
D	Document
P	Products
A	Attributes and Profiles

Pop Up Menu

Right mouse click on a selected line item or pressing Alt+F1 will pop up the Pop Up Menu. Depending on the content of the site licence user can access all the functions and options of Efficiency. The following are typical.

Contact

Access the details, functions and options of Employee (Company Contacts) of the selected activity.

Company

Access the details, functions and options of Company and Site of the selected activity.

Activity

Access the details and attachments of the selected activity as well as drilling down the specific activities of the Company, Contact or the module record. The Workflow and TO Do lists for the Company or Contact is also accessed from this option.

Use the Reschedule function to reschedule the selected activities to future dates and/or other executives.

Email

Start Email session the email to the contact or a selected recipient.

Filter, Sort

Start Filter or Sort functions.

Print

Print current window, formatted data or save as functions can be selected.

Dial

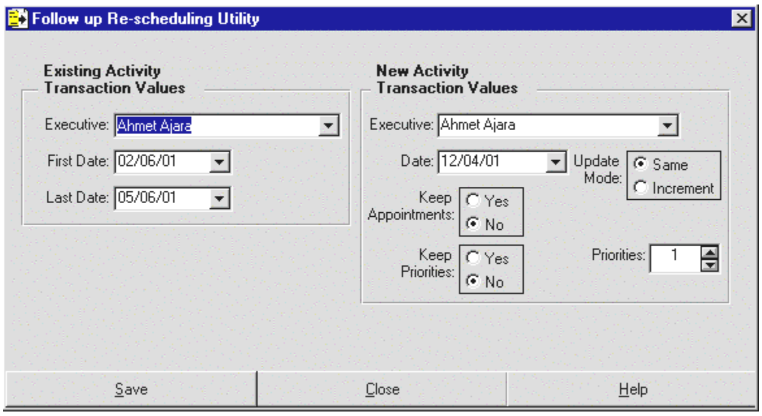
The auto dial window is displayed by listing all the available phone numbers for the contact of the activity

Enquiry

Depending on the content of the activity record Contact or Company sub menus are displayed from which all the standard enquiries are accessible.

Follow up Re-scheduling Utility

The Follow Up activities displayed on the Executive Follow Up window can be re-scheduled using this utility which is accessed from the Activity option of the pop up menu.



The prerequisites are:

- Only supervisors can re-schedule future activities belonging to executives.
- The Login executive can re-schedule his or her future activities.
- The future activities list must belong to a single executive.

Existing Activity Transaction Values

The values here represent the values from the Follow Up activity list on the follow up window.

Executive

The Next Action executive from the follow up list.

First Date – Last Date

The first and the last days of the follow up list. Changing of this dates will limit the transfer.

Next Activity Transaction Values

The values here represent the criteria to be used when the activity list is transferred to the new settings.

Executive

The new Next Action executive who will be assigned to the follow up list. The executive can be same thus only changing the date and time components of the follow up list.

Date

The First Date of the new set of follow up list.

Update Mode

There are two options.

1. **Same:** Move all the follow up activities to the same date.

2. **Increment:** Keep the date order same as the existing one starting from the new First Date

Keep Appointments

- **Yes:** Keep the appointments. This may not be a practical selection.
- **No:** Remove all the appointments

Keep Priorities

- **Yes:** Keep the priorities.
- **No:** Remove all the priorities

Priority

Select a priority number to assign to all follow-ups.

Daily Activities

Executive Daily Activities Window allows the user to access the activities for a selected date. Once the activities were listed, the pop up menu will lead the user to access to all the related information and functions of Efficiency.

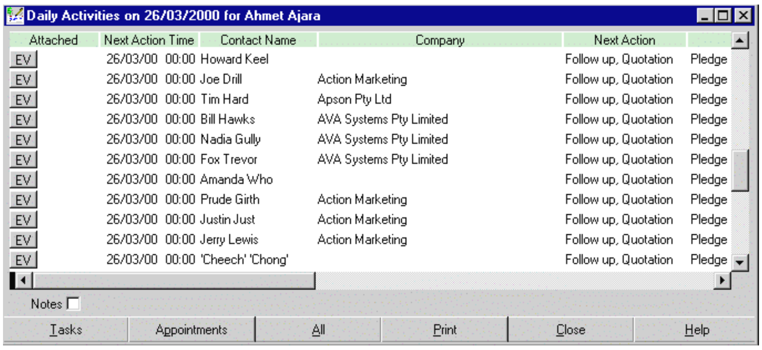
This window has three command buttons so that activities can be grouped and sorted.

Tasks: Activities without any duration.

Appointments: Activities with duration.

All: All activities.

This window can be started with the module loader at the beginning of the Efficiency session or accessed from the Daily and Weekly schedulers.



Notes

Check this box to display the notes (remarks) of each activity. Uncheck the box to condense the list without notes.

Activity Details

Double click on the highlighted line to activate the Activity Maintenance window. Clicking on the Edit button or selecting the Edit option from the Activity section of the Pop Up Menu achieves the same result.

New Activity

Highlight a line item and click on the New button or select the New option from the Activity section of the Pop Up menu. Passing the related data from the selected line item will create a new activity and the Activity maintenance window is displayed.

Follow Up an Activity

Click on this button to follow up the highlighted activity. System will warn you that the current activity will be closed and a new one will be created by using the Follow Up Activity Defaults from the User's Options. Following the confirmation of the action the newly created activity will be displayed.

Attached

The first item on each activity item contains one or more buttons. The first item represents the type (module) of the activity and the others represent the attachments of the activity.

Click on a button to activate/link the following functions:

Button	Function
AC	Activity Maintenance
OR	Order Entry Module
QT	Quotations Module
EV	Event RSVP or Guest Maintenance
CC	Questionnaire
SP	Support Module
SS	Service Module
MM	Mail Marketing (Information Only)
WF	Workflow (Information Only)
ME	Membership Module
L	Letter
D	Document
P	Products
A	Attributes and Profiles

Pop Up Menu

Right mouse click on a selected line item or pressing Alt+F1 will pop up the Pop Up Menu. Depending on the content of the site licence user can access all the functions and options of Efficiency. The following are typical.

Contact

Access the details, functions and options of Employee (Company Contacts) of the selected activity.

Company

Access the details, functions and options of Company and Site of the selected activity.

Activity

Access the details and attachments of the selected activity as well as drilling down the specific activities of the Company, Contact or the module record. The Workflow and TO Do lists for the Company or Contact is also accessed from this option.

Email

Start Email session the email to the contact or a selected recipient.

Filter, Sort

Start Filter or Sort functions.

Print

Print current window, formatted data or save as functions can be selected.

Dial

The auto dial window is displayed by listing all the available phone numbers for the contact of the activity

Enquiry

Depending on the content of the activity record Contact or Company sub menus are displayed from which all the standard enquiries are accessible.

Contact Activities History

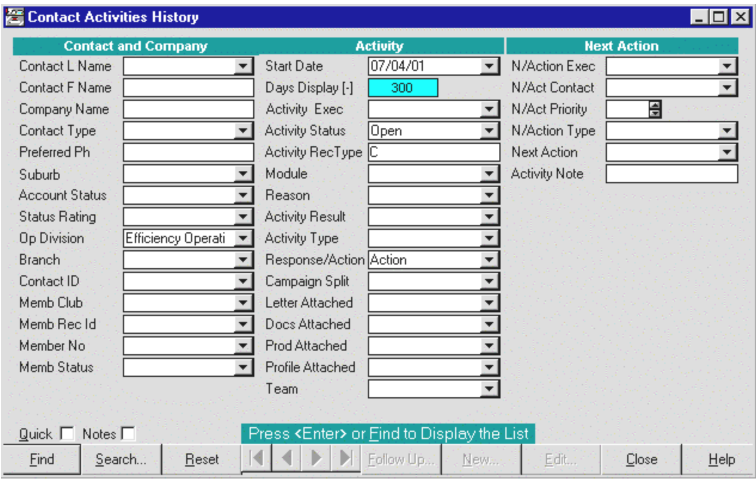
Contact Activities History Window allows the user to access the selected activities for one or for all the contacts. Once the activities were listed, the pop up menu will lead the user to access to all the related information and functions of Efficiency.

This window contains two overlaid data windows one is used for Query and the other is used for Listing of the results.

When the window is started the query data window is populated with the default values that were set in the User's preferences.

The Query Data Window

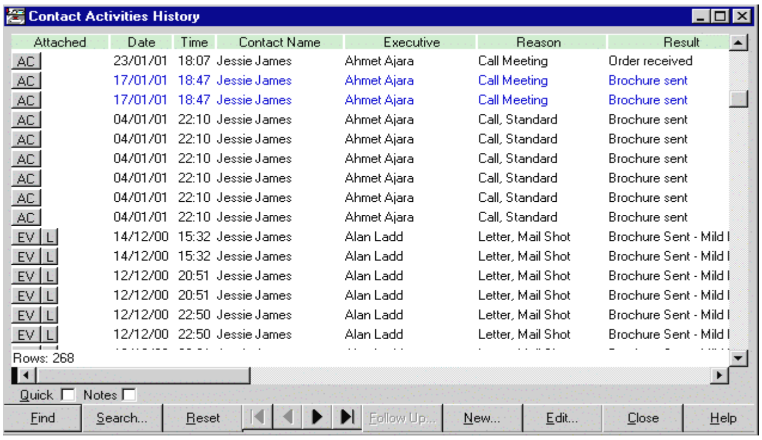
The Search Button will activate this window.



Once the selections were entered click on the Find button to display the new result set or click on the List button to display the current list in the window. It is recommended to enter contact's last name or Id so that system will display the activities for one contact. Otherwise the selection process may take some time to produce the result list

The Result (List) Display Window

The result of the query is displayed on this window



Notes

Check this box to display the notes (remarks) of each activity. Uncheck the box to condense the list without notes.

Quick

This box toggles between the Standard and Condensed (Quick) activity maintenance window.

Activity Details

Double click on the highlighted line to activate the Activity Maintenance window. Clicking on the Edit button or selecting the Edit option from the Activity section of the Pop Up Menu achieves the same result.

New Activity

Highlight a line item and click on the New button or select the New option from the Activity section of the Pop Up menu. Passing the related data from the selected line item will create a new activity and the Activity maintenance window is displayed.

Follow Up an Activity

Click on this button to follow up the highlighted activity. System will warn you that the current activity will be closed and a new one will be created by using the Follow Up Activity Defaults from the User's Options. Following the confirmation of the action the newly created activity will be displayed.

Attached

The first item on each activity item contains one or more buttons. The first item represents the type (module) of the activity and the others represent the attachments of the activity. Click on a button to activate/link the following functions:

Button	Function
AC	Activity Maintenance
OR	Order Entry Module
QT	Quotations Module
EV	Event RSVP or Guest Maintenance
CC	Questionnaire
SP	Support Module
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ME	Membership Module
L	Letter
D	Document
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A	Attributes and Profiles

Pop Up Menu

Right mouse click on a selected line item or pressing Alt+F1 will pop up the Pop Up Menu. Depending on the content of the site licence user can access all the functions and options of Efficiency. The following are typical.

Contact

Access the details, functions and options of Contact of the selected activity.

Activity

Access the details and attachments of the selected activity as well as drilling down the specific activities of the Contact or the module record. The Workflow and TO Do lists for the Contact is also accessed from this option.

Email

Start Email session the email the content of the list to contact or to a selected recipient.

Filter, Sort

Start Filter or Sort functions.

Print

Print current window, formatted data or save as functions can be selected.

Dial

The auto dial window is displayed by listing all the available phone numbers for the contact of the activity

Enquiry

Contact sub menu is displayed from which all the standard enquiries are accessible.

Company Activities History

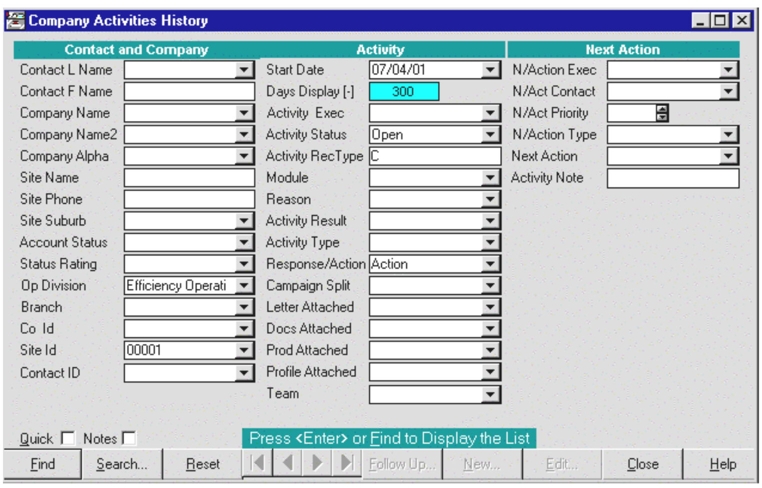
Company Activities History Window allows the user to access the selected activities for one or for all companies. Once the activities were listed, the pop up menu will lead the user to access to all the related information and functions of Efficiency.

This window contains two overlaid data windows one is used for Query and the other is used for Listing of the results.

When the window is started the query data window is populated with the default values that were set in the User's preferences.

The Query Data Window

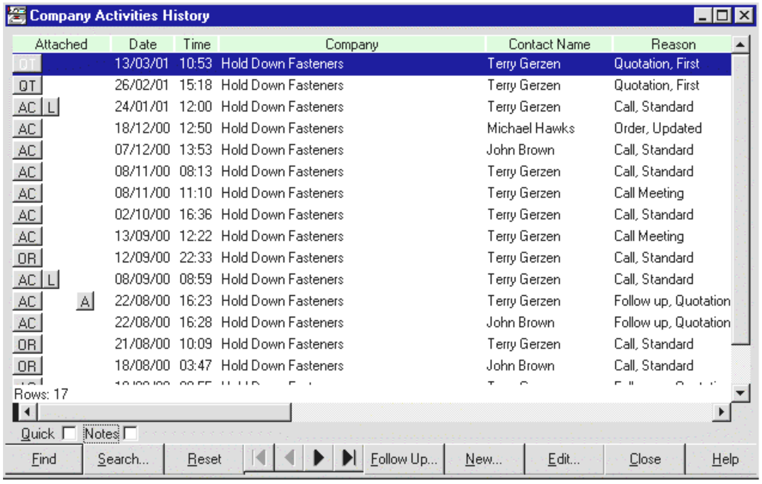
The Search Button will activate this window.



Once the selections were entered click on the Find button to display the new result set or click on the List button to display the current list in the window. It is recommended to enter company's name or Id so that system will display the activities for one company. Otherwise the selection process may take some time to produce the result list

The Result (List) Display Window

The result of the query is displayed on this window



Notes

Check this box to display the notes (remarks) of each activity. Uncheck the box to condense the list without notes.

Quick

This box toggles between the Standard and Condensed (Quick) activity maintenance window.

Activity Details

Double click on the highlighted line to activate the Activity Maintenance window. Clicking on the Edit button or selecting the Edit option from the Activity section of the Pop Up Menu achieves the same result.

New Activity

Highlight a line item and click on the New button or select the New option from the Activity section of the Pop Up menu. Passing the related data from the selected line item will create a new activity and the Activity maintenance window is displayed.

Follow Up an Activity

Click on this button to follow up the highlighted activity. System will warn you that the current activity will be closed and a new one will be created by using the Follow Up Activity Defaults from the User's Options. Following the confirmation of the action the newly created activity will be displayed.

Attached

The first item on each activity item contains one or more buttons. The first item represents the type (module) of the activity and the others represent the attachments of the activity. Click on a button to activate/link the following functions:

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Pop Up Menu

Right mouse click on a selected line item or pressing Alt+F1 will pop up the Pop Up Menu. Depending on the content of the site licence user can access all the functions and options of Efficiency. The following are typical.

Contact

Access the details, functions and options of Contact or Employee (Company Contacts) of the selected activity.

Company

Access the details, functions and options of Company and Site of the selected activity.

Activity

Access the details and attachments of the selected activity as well as drilling down the specific activities of the Company, Contact or the module record. The Workflow and TO Do lists for the Company or Contact is also accessed from this option.

New Modules

Create new records for Quotes, Orders, Support and Service Modules for the selected company, site and contact from the selected activity.

Email

Start Email session the email the content of the list to a recipient.

Filter, Sort

Start Filter or Sort functions.

Print

Print current window, formatted data or save as functions can be selected.

Dial

The auto dial window is displayed by listing all the available phone numbers for the contact of the activity

Enquiry

Depending on the content of the activity record Contact or Company sub menus are displayed from which all the standard enquiries are accessible.

Company Contact Activities History

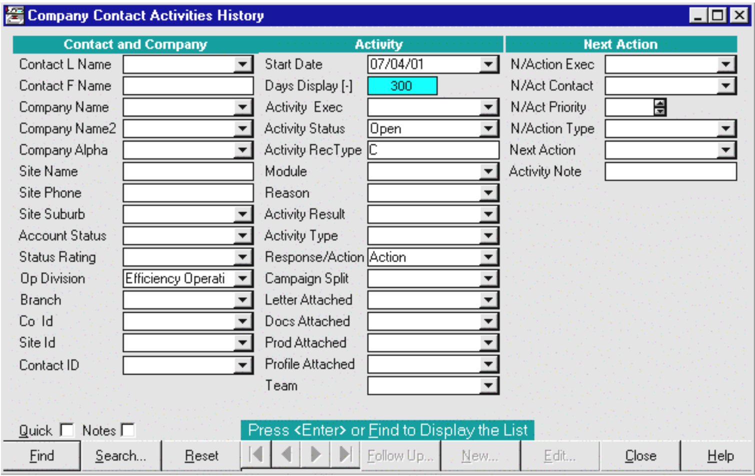
Company Contact (Employee) Activities History Window allows the user to access the selected activities for one or for all companies. Once the activities were listed, the pop up menu will lead the user to access to all the related information and functions of Efficiency.

This window contains two overlaid data windows one is used for Query and the other is used for Listing of the results.

When the window is started the query data window is populated with the default values that were set in the User's preferences.

The Query Data Window

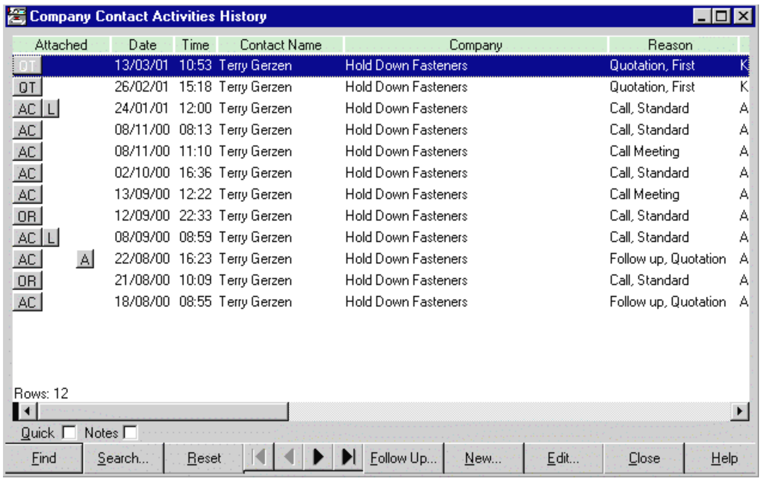
The Search Button will activate this window.



Once the selections were entered click on the Find button to display the new result set or click on the List button to display the current list in the window. It is recommended to enter company's name or Id or Contact's Last name or Id so that system will display the activities for one company. Otherwise the selection process may take some time to produce the result list

The Result (List) Display Window

The result of the query is displayed on this window



Notes

Check this box to display the notes (remarks) of each activity. Uncheck the box to condense the list without notes.

Quick

This box toggles between the Standard and Condensed (Quick) activity maintenance window.

Activity Details

Double click on the highlighted line to activate the Activity Maintenance window. Clicking on the Edit button or selecting the Edit option from the Activity section of the Pop Up Menu achieves the same result.

New Activity

Highlight a line item and click on the New button or select the New option from the Activity section of the Pop Up menu. Passing the related data from the selected line item will create a new activity and the Activity maintenance window is displayed.

Follow Up an Activity

Click on this button to follow up the highlighted activity. System will warn you that the current activity will be closed and a new one will be created by using the Follow Up Activity Defaults from the User's Options. Following the confirmation of the action the newly created activity will be displayed

Attached

The first item on each activity item contains one or more buttons. The first item represents the type (module) of the activity and the others represent the attachments of the activity. Click on a button to activate/link the following functions:

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Pop Up Menu

Right mouse click on a selected line item or pressing Alt+F1 will pop up the Pop Up Menu. Depending on the content of the site licence user can access all the functions and options of Efficiency. The following are typical.

Contact

Access the details, functions, and options of Contact or Employee (Company Contacts) of the selected activity.

Company

Access the details, functions, and options of Company and Site of the selected activity.

Activity

Access the details and attachments of the selected activity and drill down specific activities of the Company, Contact or module record. Workflow and TO Do lists for Company or Contact are also accessed from this option.

New Modules

Create new records for Quotes, Orders, Support and Service Modules for the selected company, site and contact from the selected activity.

Email

Start Email session the email the content of the list to a recipient.

Filter, Sort

Start Filter or Sort functions.

Print

Print current window, formatted data or save as functions can be selected.

Dial

The auto dial window is displayed by listing all the available phone numbers for the contact of the activity

Enquiry

Depending on the content of the activity record Contact or Company sub menus are displayed from which all the standard enquiries are accessible.

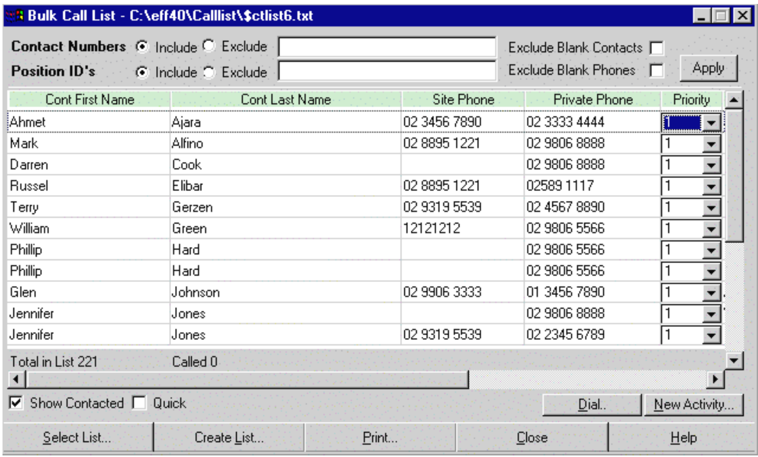
Bulk Call List

Bulk Call List utility is designed to guide the operator to contact Companies and Contacts via a pre-defined list and record the result of the contact as an activity record.

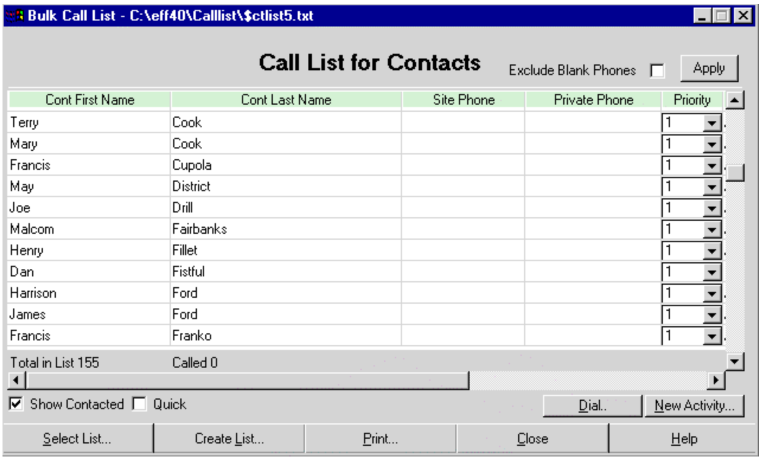
The following window displays a Call List for Companies. Call List for Contacts is very similar except the Filter options at the top include different filtering criteria.

The content of the list automatically reconfigures the window to suit either Company or Contact options.

Company Based Call List



Contacts Based Call List



The source file is a list generated by the List Generator for the function Bulk Call List. This list will default to all records being priority 1 and with a status of 'NOT CALLED'. When the utility is first opened, it will attempt to open the default file as defined in user preferences. If it cannot, a blank list will appear. Usually the list will simply look the same as when it was last used.

You can click on the <Browse> command button to select a new "List File" from the existing file list.

The list will return the contact names, and their company and phone numbers. When a record is double clicked, the activity transaction screen is opened populated with the respective contact and/or company information. When the call is closed successfully, the call record is updated to status of 'CALLED', and will be removed from the list. It can be recalled optionally, however a new call transaction record will not be allowed more than once for the same contact. When closed this utility will prompt the user to either delete the call list, re-assign it to a future date and/or another executive or simply close and save it.

Browse

The user may have more than one Call List file stored on the user's PC's hard disk or in the specified network directory. Click on the <Browse> command button to select a file.

During the Call List file creation process if no name was specified, the default name of **$BLKCAL$.TXT** would have been used.

WARNING: The users are allowed to use only the Call Lists generated for them. Supervisor can re-issue the existing Call Lists to the other users.

Activity (Call) Transaction

When a line on the Call List is double clicked, the call transaction screen is opened populated with the respective contacts information and the Call Defaults nominated by the User Preferences.

The Quick or Standard Call Transactions can be activated.

Close the Call List

When closed this utility will prompt the user to either delete the call list, re-assign it to a future date and/or another executive or simply close and save it.

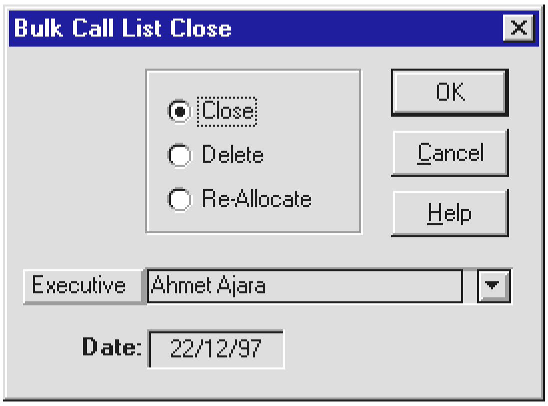
The following options are available:

Close: Simply closes the Call List without any further modifications.

Delete: Deletes the Call List file from the directory.

Re-allocate: Allows the user to select another Executive or another date for the Call List. This option will only change the header details of the Call List.

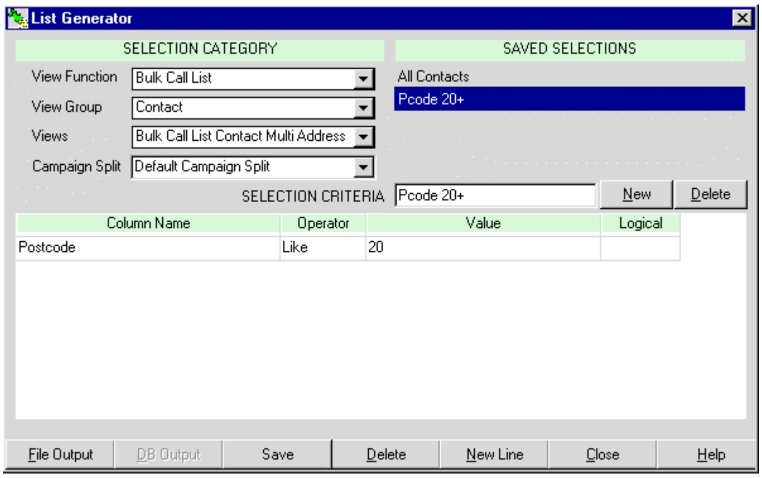
WARNING: **If a new Executive is selected, this Call List will not be available any longer for the previous Executive.**



The available options are discussed in the Bulk Call List Close topic.

Create a Call List

To create a new Call List click on the <Create> command button. The following window is displayed.



The details of this function are available in the supervisor manual.

Grid

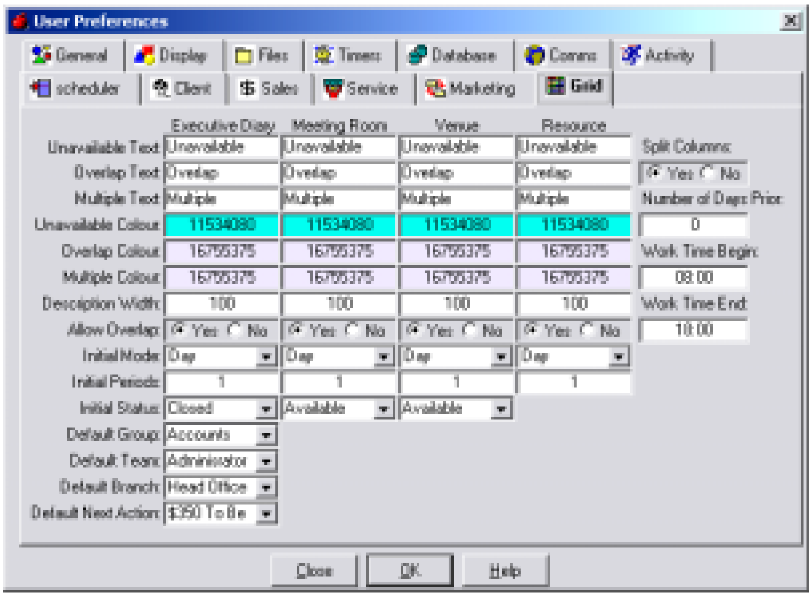
The Grid display utility is designed to display the following activities in multi purpose grid display.

- Executive Diary and Scheduler
- Meeting Room Allocations
- Resource Allocations
- Event Venue Bookings

The grid is accessed from the Modules-Activities-Grid option of the main menu.

How to Set Up

Grid can be set up for each PC on the user preferences utility.



The text and colour display options will change the appearance of the grid.

Initial Mode and periods effect the initial configuration and the number of periods to display on the grid.

Set the display colours for the required statuses for the activity status and venue status on the Efficiency Codes utility. System will display the status colours on the grid.

Executives Scheduler

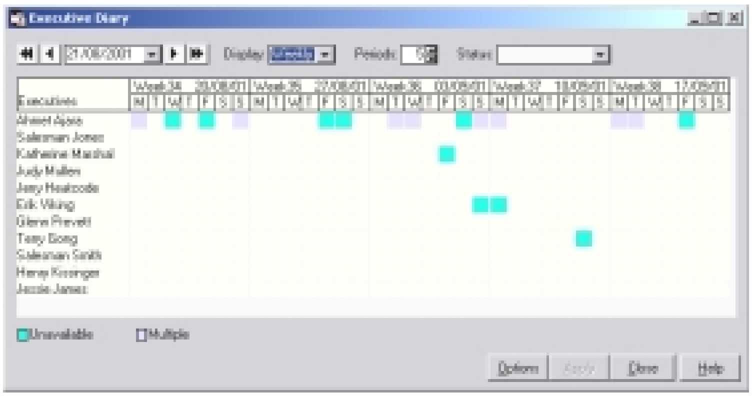
Depending on the default values on the user preferences for the following items the list of executives and their diary is displayed on the grid:

list of executives and their diary is displayed on the grid:

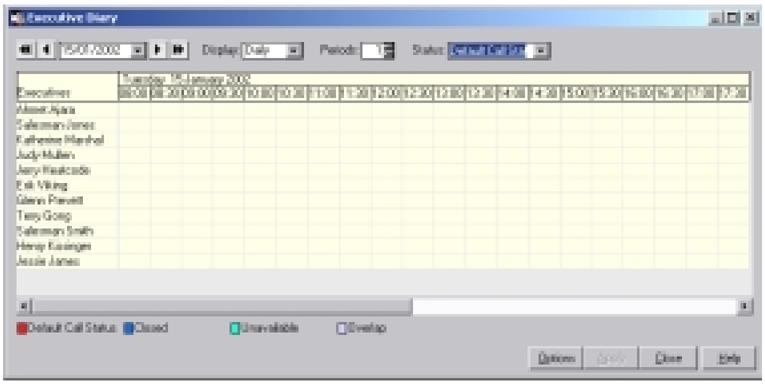
- Executive Group
- Executive Team
- Branch
- Activity type

The default status field will result a filter on the initial grid display.

Weekly Display



Daily Display



Selection Options

Each time a selection criterion is entered the Apply button must be clicked on.

<u>**Display**</u>: Three options are available

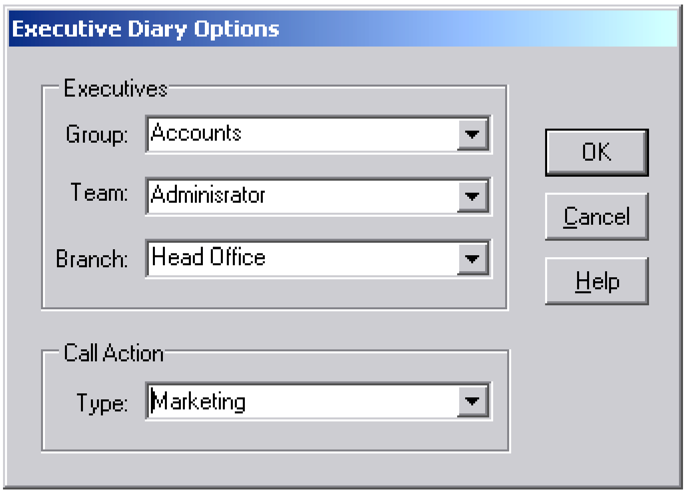
1. Daily
2. Weekly
3. Monthly

<u>**Periods:**</u> The number of display options to be shown on the grid.

<u>**Status:**</u> The status of the activity or the venues to be filtered.

<u>**Date:**</u> The starting date of the display type.

<u>**Options:**</u> Click on this button to make further selections on the executives and activities.



Double click on any one of grid cells with the status colour on it one of the following will be displayed.

- Activity Maintenance window
- Executive Availability window

Meeting Rooms

The display options are very similar to the executive diary grid.

Double click on any one of grid cells with the status colour on it one of the following will be displayed.

Activity Maintenance window

Executive Availability window

Resources

The display options are very similar to the executive diary grid.

Double click on any one of grid cells with the status colour on it one of the following will be displayed.

- Activity Maintenance window
- Executive Availability window
- Venues

This option is accessed from the Modules-Activities-Grid option of the main menu.

The display options are very similar to the executive diary grid.

Double click on any one of grid cells with the status colour on it one of the following will be displayed.