

Activity Lists

Each contact and account in Forté CRM has an Activity tab containing a list of all activity items that have been recorded for them. The activity list is a history of all interaction with the contact or account. It shows the date, activity type (note, document, email, appointment, etc.), brief details of the item and who in our organisation entered the item.

It is good practice to record all our conversations against the account or contact for future reference. This will allow other account managers (that have permission) to view previous discussions and be up-to-date with the latest developments between you and our clients. You can also save documents, reports or other files against the account or contact and these can also be shared with other account managers.

Activity items can be filtered and sorted to locate specific events. Activity items can also be edited, subject to permissions.

Viewing activity lists

To view the activity list for a contact or account:

- Click on the required contact or account in the treeview on the left of the main screen or double click on the selected contact or account in the grid on the right.
- Once selected various tabs are available to view information on the contact or account. Click on the 'Activity' tab to view the list of activity items.

Note Viewing activity items entered by others in our organisation is only available in the multi-user versions of Forté.

Date	Type	Details	Account Manager
24/08/2007	Task	Call Genine re her accountants comments	John Frederick Smit (FM)
15/01/2007	PDF Attachment	[Test] All :CONTACT text symbols	John Frederick Smit (FM)
29/12/2006	Call in	Genine rang and wants a portfolio	John Frederick Smit (FM)
22/11/2006	Call	Call	Margaret Dale (PA)
18/10/2006	General Note	Client asked if investments are made	Ned Seagoon (AM)
10/10/2006	Document Store	Client sent email and asked how long it	Ned Seagoon (AM)
2/10/2006	Document Store	Client wanted to know what needs to be	Ned Seagoon (AM)
19/09/2006	General Note	Client asked about management fees.	Ned Seagoon (AM)
7/08/2006	General Note	Client phoned and asked what type of	Ned Seagoon (AM)
28/07/2006	General Note	Asked if she can use two or more	Ned Seagoon (AM)
1/07/2006	General Note	New Portfolio has been set up for client.	Ned Seagoon (AM)
29/06/2006	General Note	Client made enquiry through email	Ned Seagoon (AM)
24/06/2006	General Note	Client Re-scheduled meeting to next	Ned Seagoon (AM)
21/06/2006	Email From	Conference: Time Schedule	John Frederick Smit (FM)
21/06/2006	Email From	Please find the report attached as	John Frederick Smit (FM)
21/06/2006	Email From	Please confirm meeting on Friday	John Frederick Smit (FM)
25/03/2006	Document	Created on 25/03/2006 16:00 by John	John Frederick Smit (FM)
25/03/2006	Email To	Portfolio report	John Frederick Smit (FM)
27/07/2005	Document	Created on 27/07/2005 11:26 by Ned	Ned Seagoon (AM)

Sorting and Filtering

Over time the activity list for a contact or account will contain many activity items. To easily locate a specific item, it is possible to sort and filter activity items.

Sort

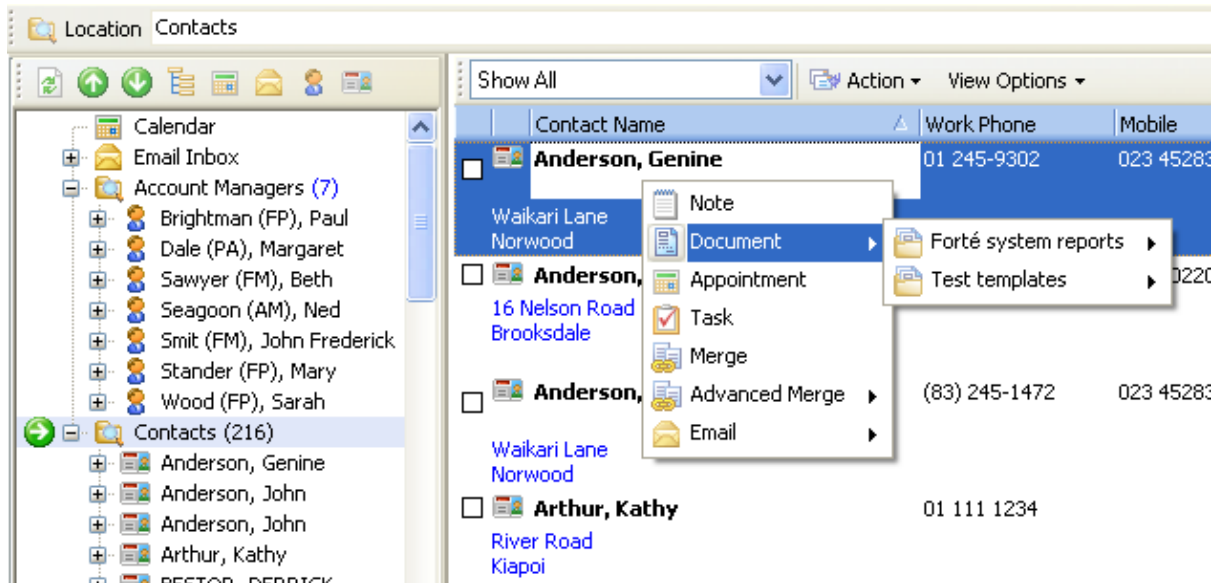
Clicking on any of the headings in the activity list (Date, Type, Details, Account Manager) sorts the list by that column in ascending or alphabetical order. Clicking the same column heading again changes the sort order to descending. The column being sorted by is denoted by a small grey triangle which points up or down, depending on sort order.

Filter

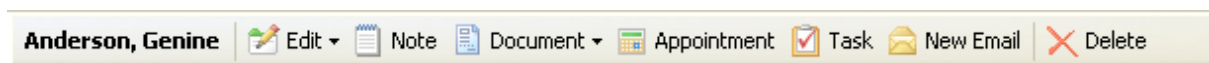
Each column heading also has a blue downward arrow. Clicking on this arrow allows the lists to be filtered, either by one of the available options or by a custom filter. You can filter on many columns at once, but only one column can be used for sort order. To remove a filter, click on the same blue arrow and choose [All] from the drop down list.

Creating new activity items

Items can be recorded on the activity list for a contact or account by right clicking in the tree view or grid and selecting the required action from the menu.



Alternatively, once a contact or account has been selected, click on one of the buttons on the task bar to create an activity item.



If an appointment, task, email or document is linked to a contact or account when it is created, the item will be shown in their activity list.