Activity Lists

Each contact and account in Forté CRM has an Activit tab containing a list of all activit items that have been recorded for them. The activit list is a histor of all interaction ith the contact or account. It sho s the date, activit t pe (note, document, email, appointment, etc.), brief details of the item and ho in our organisation entered the item.

It is good practice to record all our conversations against the account or contact for future reference. This ill allo other account managers (that have permission) to vie previous discussions and be up-to-date ith the latest developments bet een ou and our clients. You can also save documents, reports or other files against the account or contact and these can also be shared ith other account managers.

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

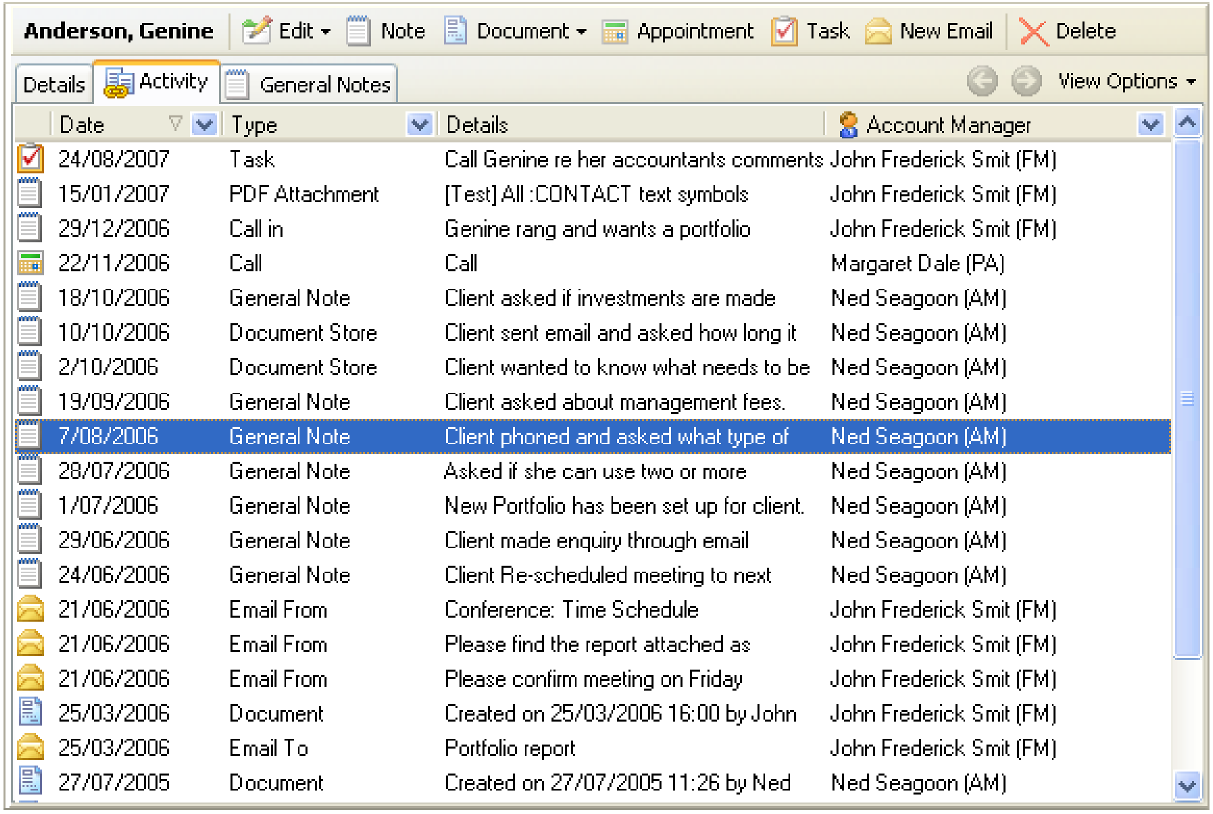
V e ng act v ty l sts

T v e the act v ty l st f r a c ntact r acc unt:

- Click on the required contact or account in the treevie 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 vie information on the contact or account. Click on the 'Activit ' tab to vie the list of activit items.

N te Vie ing activit items entered b others in our organisation is onl available in the multi-user versions of Forté.



S rt ng and F lter ng

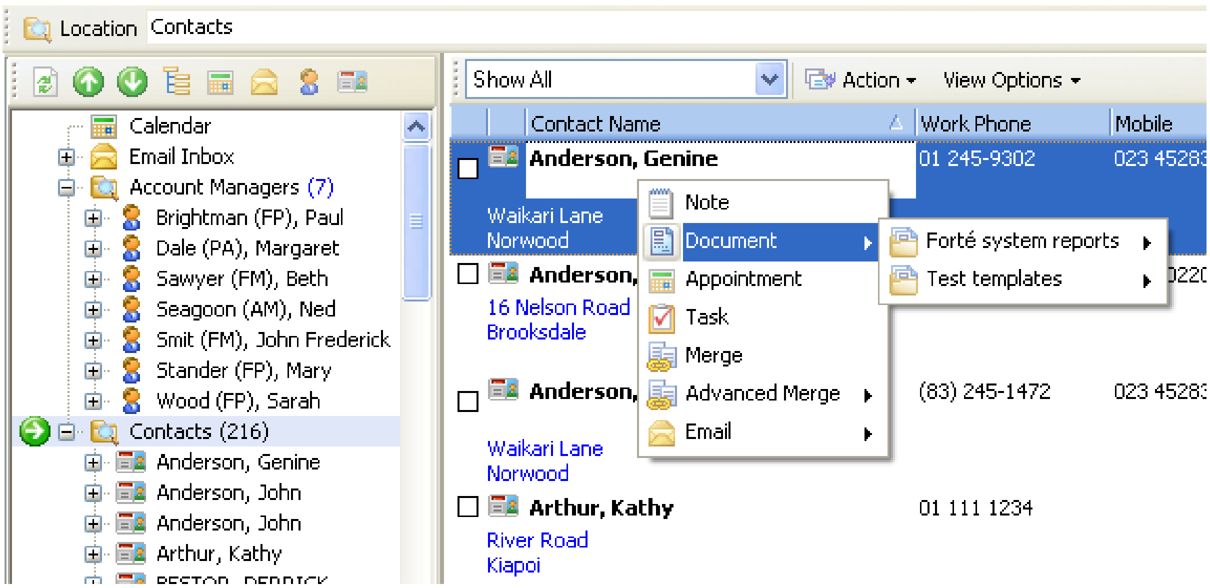
Over time the activit list for a contact or account ill contain man activit items. To easil locate a specific item, it is possible to sort and filter activit items.

S rt
Clicking on an of the headings in the activit list (Date, T pe, Details, Account Manager) sorts the list b that column in ascending or alphabetical order. Clicking the same column heading again changes the sort order to descending. The column being sorted b is denoted b a small gre triangle hich points up or do n, depending on sort order.

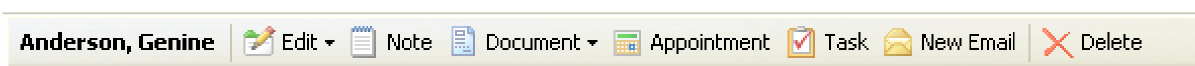
F lter
Each column heading also has a blue do n ards arro . Clicking on this arro allo s the lists to be filtered, either b one of the available options or b a custom filter. You can filter on man columns at once, but onl one column can be used for sort order. To remove a filter, click on the same blue arro and choose [All] from the drop do n list.

Creat ng ne   act v ty tems

Items can be recorded on the activit   list for a contact or account b   right clicking in the treevie   or grid and selecting the required action from the menu.



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



If an appointment, task, email or document   as linked to a contact or account   hen it   as created, the item   ill be sho n in their activit   list.