Track Activities and Follow-Ups

Calendar & Activities · https://learning.pcrecruiter.net/site/docs/activities/track-activities-and-follow-ups/

Activities are used to record communications, events, and actions related to a record (e.g. telephone calls, emails and letters sent, interviews, etc.). This is a useful way to track the relationship with a record since activities can be searched and reported on. Many actions you perform in PCRecruiter will automatically record an activity (click here for a list of system generated activities). However, you can use Custom Activities to manually record actions such as leaving a voicemail or making a specific type of call.

Administrators: click here to learn how to set up custom activity types

Viewing Existing Activities

1. Go to the record you wish to view activities for.
2. Choose **Activities** from the Navigation menu.
3. Here you can see the following:
    1. **Select**: Allows you to choose multiple activities to delete. (Deleting is done via the trash can icon in the action menu.)
    2. **Save**: If you need to edit any part of the activity (Date, Username, Text, etc.), you will select the corresponding Save icon to save your changes.
    3. **Date/Time**: Shows the Date/Time that the activity took place. This may also show a future date indicating a follow-up that has been scheduled.
    4. **Activity Type**: This indicates the type of action that has been completed. Examples of these include Cold Call, Left Voicemail, etc.
    5. **Result**: Shows a result of the Activity Type, for instance Connected, Attempt, Missed Call, etc.
    6. **Username**: The username that has completed the action or the user whose name is selected when creating a new activity.

7. **Activity Text:** This is a box that will contain any notes pertaining to your activity. This box will include your email body where appropriate.

Adding an Activity

1. Go to the record you wish to schedule an activity for.
2. Click the **Add Activity** action icon.
    1. You can also go to the Activities navigation icon to view all activities, then select Add from the action menu.
3. To modify when the action occurred, select the **Date And Time** box and use the calendar picker to select the time.
4. Checkmark the box for **Schedule** to place the activity on the PCR calendar of the selected User Name.
    - Use the dropdown directly next to the date and time to choose the **duration** of the activity (appointment).
    - Choose the appropriate **color** for your activity. (Or click here to learn how to set them up).
    - Click the **Alarm** icon to choose your desired alarm option. (This will trigger a standard PCR popup alarm).
5. Choose the appropriate **Activity Type**.
    - If the selected Activity Type has Result Code options, an additional dropdown will appear to select your result code.
6. Adjust the **User Name** if the Activity should be written by a different user name than you are currently logged in as.
    - Note: Modifying the username will add the scheduled appointment to the selected user's schedule rather than the user who is creating the activity.
7. Enter any notes into the **Activity Text** box. (What appears in this box automatically? Click here to learn how to change your defaults).
8. Check **Copy to Company** to copy the activity to the associated Company Record.
9. Click **Save** to create your activity and add it to the schedule.

Viewing User Schedules

From the Add Activity screen, you can also access a quick view of your and other users' schedules.

1. Click **Schedule** (calendar icon) in the top right corner of the Add Activity screen.
2. Use the dropdown in the top left corner to toggle between usernames.
    1. If you do not see a username in this dropdown, the user is not currently sharing their schedule. To share a schedule, do the following while logged in as the username: Go to **Schedule** on the main toolbar, choose **Manage Calendars** from the action toolbar on the right, check the "**Share Calendar**" option, close the window. (DO NOT select Add, just close the window).
    2. Once the above steps are completed, you will see the additional username upon reloading the Add Activity screen.

Add an Activity With a Follow-Up

1. Follow the steps above to **Add an Activity**, but before you save, you can schedule a follow-up in the same window.
2. In the Schedule Follow-up tab enter your **Follow-Up Date/Time** into the appropriate box.
    - Use the dropdown directly next to the date and time to choose the **duration** of the activity (appointment).
    - Choose the appropriate **color** for your activity (Or click here to learn how to set them up).
    - Click the **Alarm** icon to choose your desired alarm option. (This will trigger a standard PCR popup alarm).
3. In the **Select Users** box, use the add button to choose additional users for this follow-up. (The person creating the activity will automatically be selected). Whoever is selected in this box will receive a scheduled item on their calendar.
4. Select the checkbox for "**Create Follow-Up as separate activity**" to write the follow-up as its own activity. (Click here to learn how to set what Activity Type is being written when this checkbox is selected).
5. Select **Save** to create your activity and your follow-up.

Track Your Daily Activities on Your Schedule

Using this option, you can quickly access your schedule and view all activity which has taken place during the day (This is a great tracking tool!)

1. Create an activity following the directions discussed above.
2. Check the option for **Schedule**. (This can be checked by default as well).
3. Click **Save** to create your activity and place it onto your calendar.

Copy to Company

This option is great to use when communicating with multiple contacts within a company. Anytime you wish to see the activities, you can access the company and see all the activities regardless of the name it was written under.

1. Go to the record and create an activity as discussed above.
2. Check the option to **Copy To Company**. (This can be checked by default as well).
3. Click Save to create your activity.

Share Activity

Use the Share Activity area to copy an activity to another name record and send that person an email. (Email is only available when adding a name activity). Prior to saving an activity:

1. Click the plus sign icon next to the "**Share Activity**" box.
    - If you do not see the Share Activity box, click here to see how to customize your default settings.
2. **Search** for the name record you would like to share this activity with.
3. Choose **Copy** to write this activity to both the record it originated from as well as the selected record(s).
4. Choose **Email** to send an email to the name record(s) you have selected.
5. Click **Save** to trigger the email and create the duplicate activity.