ORDER POWER!

Activity Tracking

User Guide

Release 4.0.1

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Activity Tracking

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Activity Tracking

ORDER POWER! **Activity Tracking** is a tool designed to help you coordinate, schedule and track all the individual tasks involved in managing your business. **Activity Tracking** allows your company to effectively and consistently manage prospects, customers, and vendors.

Terms to know

Activity

A job or project to be accomplished by a designated person or department. You decide if an **Activity** will contain **Activity Details** (subtasks) that further define the job or project, depending on its complexity.

Activity Type

A code that categorizes which type of **Activity** you are creating. Possible **Activity** types are: Order/Ordered Item, Customer (non order), Item-related, Vendor-related, Purchase Order-related, Management/Miscellaneous.

Activity Header

The first panel of information associated with an **Activity**. On a complex **Activity**, this panel is a summary of the overall plan. On a simple **Activity**, this panel may contain all the necessary information.

Activity Types, **Reason** codes, **Action** codes, and **Resolution** codes all accumulate statistical data, essential for **Activity Reporting**.

Activity Detail

Subtasks related to a specific **Activity**.

Reason Code

A code describing the reason for creating an **Activity** or **Activity Detail**.

Action Code

A code describing your intended action for an **Activity** or **Activity Detail**.

Resolution Code

A code describing the final resolution of an **Activity** or **Activity Detail**.

Representative Code

A code used for **Activity Tracking** only, and is independent of all other identifications on the AS/400 and in ***ORDER POWER!***. It may represent either a person or a department.

Working with Management Tracking Logs

A **pseudo-activity**, set up for the purpose of recording the use of various codes by a specific **Representative** or department.

Setting up Activity Tracking

Activity Tracking requires some brief setup in these five areas:

- **Company Profile** *see below*
- **Reason Codes** *see page 5*
- **Action Codes** *see page 7*
- **Resolution Codes** *see page 10*
- **Representatives** *see page 12*

Setting up the Company Profile for Activity Tracking

The information you enter in the **Company Profile** customizes ***ORDER POWER!*** to meet your company's unique business requirements.

To set up Activity Tracking

1. From the ***ORDER POWER!*** *Main Menu*, select: **Work with Files➔Company Profile➔F15 (Maintenance)➔Activity Tracking** to display the *Company Profile Activity Tracking Profile panel 18 (figure 1)*.

```
Company # 001             Computer Solutions, Inc.                Panel 18
                          Activity Tracking Profile

 Next Activity Number                          112

 Status Maintenance Method              B    Automatic/Manual/Both
 Allow Creator to set Follow-Up Date    N    Y/N
 Default Inq Select Representative to   1    1=User ID    2=Users Dept Code
                                             3="*Q"       4=Blank
 Automatic Log Note Creation:
  When Notify Date Changes              Y    Y/N
  When Action Code Changes              Y    Y/N
  When Reason Code Changes              Y    Y/N
  When Resolution Code Changes          Y    Y/N
  When Representative Changes           Y    Y/N
  When RA is Maintained/Received        Y    Y/N




 F1=Help  F3=Exit  F12=Cancel  F21=List
```

Company Profile Activity Tracking Profile panel 18 (figure 1)

2. Complete these fields:

Next Activity Number

Type a number you want to ***ORDER POWER!*** to use as the next automatically assigned **Activity Number** when an **Activity** is created.

Status Maintenance Method

Type a code that indicates which method you want to use for status maintenance for **Activities**.

A(utomatic)	-	status is maintained by ***ORDER POWER!*** only
M(anual)	-	status is maintained by **Activity Tracking Representatives** only
B(oth)	-	status is maintained by both of the above

Allow Creator to set Follow-Up Date

Type **Y**(es) or **N**(o) to indicate whether or not you want to allow the **Activity Tracking Representative** who creates an **Activity** to set its **Notify Date**. If you specify **N**(o), the date defaults to zeros, which sorts to the top of the **Activity List**.

Default Inq Select Representative to

Type a code to indicate what you want the *Activity Tracking Selection panel (figure 18)* to automatically prefill in the **Representative** field.

1 User ID
2 Reps Dept Code
3 Activity Queue (see page 30 for details about the **Activity Queue**)
4 Blank

Automatic Log Note Creation When

- **Notify Date Changes**
- **Action Code Changes**
- **Reason Code Changes**
- **Resolution Code Changes**
- **Representative Changes**
- **RA is Maintained/Received**

Type **Y**(es) or **N**(o) to indicate whether or not you want **Activity Tracking** to automatically create a **Log Note** for each of the events listed.

3. Press **Enter** to display the *Company Profile Activity Tracking Profile panel 18.1 (figure 2)*.

```
Company # 001            Computer Solutions, Inc.                 Panel 18.1
                               Profile Update

 Interface Switches:

  Auto Create Activity when RA Created          Y  Y/N

 Auto Create:                               Yes/No/Prompt
  Order Comment when Order Activity Created.... Y  Y/N/P   ?Comment Code !__
  Vendor Comment when Vnd Activity Created..... N  Y/N/P   ?Comment Code ___
  Customer Comment when Cst Activity Created... N  Y/N/P   ?Comment Code ___
  PO Comment when PO Activity Created.......... N  Y/N/P   ?Comment Code ___













 F1=Help  F3=Exit  F4=?List  F12=Cancel
```

Company Profile Activity Tracking Profile panel 18.1 (figure 2)

4. Complete these fields:

Auto Create Activity when RA Created

Type a code to indicate how you want ***ORDER POWER!*** to respond whenever a **Return Authorization** is created.

Y(es) automatically create an **Activity**
N(o) do not automatically create an **Activity**
P(rompt) if you want **Activity Tracking** to prompt the user who is creating the **Return Authorization** to ask if an **Activity** should be created

Auto Create

- **Order Comment when Order Activity Created**
- **Vendor Comment when Vnd Activity Created**
- **Customer Comment when Cst Activity Created**
- **PO Comment when PO Activity Created**

Type **Y**(es) or **N**(o) to indicate whether or not you want **Activity Tracking** to automatically create a **Comment** for each of the **Activities** listed.

Comment Code

Type the **Comment Code** you want **Activity Tracking** to use when automatically creating a **Comment** for each **Activities** to the left. (This only applies if you typed **Y**(es) in the respective Activity field.)

5. Press **Enter** to display *Company Profile Activity Tracking Profile panel 18.2 (figure 3).*

```
Company # 001           Computer Solutions, Inc.                Panel 18.2
                              Profile Update

 Password to Delete Headers     CSI1           *none - password not required
 Password to Delete Details     CSI2           *none - password not required

        - - - - - - - - - - - - - Info Fields - - - - - - - - - - - -
 Activity Header:         Mandatory        Action Codes:            Mandatory
  1 ........... PRIORITY    Y Y/N           1 ........... AC001       Y Y/N
  2 ........... __________  N Y/N           2 ........... AC002       N Y/N
  3 ........... __________  N Y/N           3 ........... AC003       N Y/N

 Activity Detail:         Mandatory        Reason Codes:            Mandatory
  1 ........... PRIORITY    N Y/N           1 ........... RE001       Y Y/N
  2 ........... __________  N Y/N           2 ........... RE002       N Y/N
  3 ........... __________  N Y/N           3 ........... RE003       N Y/N

 Representative Codes:    Mandatory        Resolution Codes:        Mandatory
  1 ........... RP001       N Y/N           1 ........... RS001       Y Y/N
  2 ........... RP002       N Y/N           2 ........... RS002       N Y/N
  3 ........... RP003       N Y/N           3 ........... RS003       N Y/N

 F1=Help  F3=Exit  F12=Cancel
```

Company Profile Activity Tracking Profile panel 18.2 (figure 3)

6. Complete these fields:

Password to Delete Headers

Type the password you want to require before a **Representative** can delete an **Activity** (header).

Password to Delete Details

Type the password you want to require before a **Representative** can delete an **Activity Detail**.

Activity Tracking Info Fields

Type the text you want to define the headings for these **Info fields** that collect miscellaneous information about each subject.

Mandatory

Type **Y**(es) or **N**(o) to indicate whether or not you want each **Info field** to be a mandatory or optional entry on its respective panel.

7. Press **Enter** to display the *Company Profile Activity Tracking Profile panel 18.3 (figure 4).*

```
Company # 001            Computer Solutions, Inc.                 Panel 18.3
                               Profile Update

Require Codes For:         Headers     Details
 Orders/Ordered Items         Y  Y/N      N  Y/N
 Items, Non Order Related     N  Y/N      N  Y/N
 Customer Related             N  Y/N      N  Y/N
 Vendor Related               N  Y/N      N  Y/N
 Purchase Order Related       N  Y/N      N  Y/N
 Management/Misc              N  Y/N      N  Y/N

Additional Info Fields:
 Info 1 ...........       __________
 Info 2 ...........       __________
 Info 3 ...........       __________





F1=Help  F3=Exit  F12=Cancel
```

Company Profile Activity Tracking Profile panel 18.3 (figure 4)

8. Complete these fields:

   Require Codes For:
   Orders/Ordered Items / Items, Non Order Related / Customer Related / Vendor Related / Purchase Order Related / Management/Misc

   For each type of **Activity** listed, type **Y**(es) or **N**(o) to indicate whether or not you want to require the **Representative** to input **Reason**, **Action**, and **Resolution** codes.

9. Press **Enter** to update the **Company Profile** Activity Tracking defaults.

Reason Codes

An **Activity Tracking Reason** code describing the reason for creating an **Activity** or **Activity Detail**. **Reason** codes accumulate statistical data, and so are valuable for Activity reporting.

From the ***ORDER POWER!*** *Main Menu*, select: **Activity Tracking** > **Reason Code Inquiry** to display the *Activity Tracking Reason Code Inquiry panel (figure 5)*.

```
 Pstn : _____            Computer Solutions, Inc.
                   Activity Tracking Reason Code Inquiry     Show Deleted:  N
 2=Change  5=Display

     Reason                                  Notify  Detail     Letter
Opt  Code     Description                    Mgmnt   Template   Code       Del
 _   BROKE    Product broken                         TMP01      LTR01
 _   CRDAP    Credit Application
 _   CRED     Check Credit
 _   CUS      Customize Item
 _   MAN      Wrong or missing manual
 _   RCV      Not received
 _   SAT      Customer not satisfied
 _   000      General Research





                                                                          Bottom
F1=Help F3=Exit F6=Create F7=Bkwd F8=Fwd F12=Cancel F17=Top F18=Bot F21=List
```

Activity Tracking Reason Code Inquiry panel (figure 5)

These actions are available, in addition to the standard ***ORDER POWER!*** functions:

Action	Description
2=Update	Display *Activity Tracking Reason Code Update panel (figure 7)* to work with an **Activity Tracking Reason** code
5=Display	Display the *Activity Tracking Reason Code Display window* to view an **Activity Tracking Reason** code
F6=Create	Display the *Activity Tracking Reason Code Prompt panel (figure 6)* to create a new **Activity Tracking Reason** code

To create a new Activity Tracking Reason Code

1. On the *Activity Tracking Reason Code Inquiry panel (figure 5)*, press **F6** (Create) to display the *Activity Tracking Reason Code Prompt panel (figure 6)*.

```
                 Computer Solutions, Inc.
            Activity Tracking Reason Code Prompt

                        Reason Code
                           _____

 F1=Help  F3=Exit  F12=Cancel
```

Activity Tracking Reason Code Prompt panel (figure 6)

2. Complete this field:

Reason Code
Type a code that you want to use to describe the reason for creating an **Activity** or **Activity Detail**. **Reason** codes accumulate statistical data, and so are valuable for Activity reporting.

To update an Activity Tracking Reason Code

1. On the *Activity Tracking Reason Code Inquiry panel (figure 5)*, type **2** (Update), beside the **Reason** code you want to work with, then press **Enter** to display the *Activity Tracking Reason Code Update panel (figure 7)*.

```
                    Computer Solutions, Inc.
              Activity Tracking Reason Code Update

                            Reason Code
                               BROKE

Description  Product broken

Notify Management     _          (Y/N)
Letter Code           LTR01
Detail Template Code  TMP01

Info1                 TEST
Info2
Info3




                                                        Delete _
F1=Help  F3=Exit  F12=Cancel
```

Activity Tracking Reason Code Update panel (figure 7)

2. Complete these fields:

   Description
   Type a description of the situation where you want this **Reason** code to be used.

   Notify Management
   Type **Y**(es) or **N**(o) to indicate whether or not you want ***ORDER POWER!*** to automatically create a **Log Note** in the **Management Tracking Log** assigned to the **Representative** who uses this **Reason Code**.

   Letter Code
   Future enhancement

   Detail Template Code
   Future enhancement

   Info fields 1 / 2 / 3
   Type the information requested in these three user-defined fields. Your company defines these fields on *Company Profile Activity Tracking Profile panel 18.2 (figure 3)*.

3. Press **Enter** to update the **Reason** code record.

To display an Activity Tracking Reason Code

On the *Activity Tracking Reason Code Inquiry panel (figure 5)*, type **5** (Display), beside the **Reason** code you want to work with, then press **Enter** to display the *Activity Tracking Reason Code Display window* similar to *Activity Tracking Reason Code Update panel (figure 7)*.

Action Codes

An **Activity Tracking Action** code describing your intended action for an **Activity** or **Activity Detail**. **Action** codes accumulate statistical data, and so are valuable for Activity reporting.

From the ***ORDER POWER!*** *Main Menu*, select: **Activity Tracking Action Code Inquiry** to display the *Activity Tracking Action Code Inquiry panel (figure 8)*.

```
Pstn : _____          Computer Solutions, Inc.
                    Activity Tracking Action Code Inquiry    Show Deleted: N

2=Change  5=Display
    Action                               Notify  Letter
Opt  Code     Description                Mgmnt   Code      Del
 _   CALL     Call back                    N
 _   EXPL     Explain/Answer Questions     N
 _   MAN      Send new manual to customer  N
 _   RA       Issue a Return Auth to Cust. N
 _   REPL     Replace Item (after returned) N
 _   REPL1    Replace Item for free        Y
 _   RMERC    Refund item cost             Y
 _   RSHIP    Refund Shipping              N
 _   000      General Research             N

                                                                  Bottom
F1=Help F3=Exit F6=Create F7=Bkwd F8=Fwd F12=Cancel F17=Top F18=Bot F21=List
```

Activity Tracking Action Code Inquiry panel (figure 8)

These actions are available, in addition to the standard ***ORDER POWER!*** functions:

Action	Description
2=Update	Display the *Activity Tracking Action Code Update panel (figure 10)* to work with an **Activity Tracking Action** code
5=Display	Display the *Activity Tracking Action Code Display window*, to view the **Activity Tracking Action** code
F6=Create	Display the *Activity Tracking Action Code Prompt panel (figure 9)* to create a new **Activity Tracking Action** code

To create a new Activity Tracking Action Code

1. On the *Activity Tracking Action Code Inquiry panel (figure 8)*, press **F6** (Create) to display the *Activity Tracking Action Code Prompt panel (figure 9)*.

```
                       Computer Solutions, Inc.
                  Activity Tracking Action Code Prompt

                             Action Code
                                _____

F1=Help  F3=Exit  F12=Cancel
```

Activity Tracking Action Code Prompt panel (figure 9)

1a. Complete this field:

Action Code
Type a code that you want to use to describe your intended action for an **Activity** or **Activity Detail**.

1b. Press **Enter** to display the *Activity Tracking Action Code Update panel (figure 10)*.

To update an Activity Tracking Action Code

1. On the *Activity Tracking Action Code Inquiry panel (figure 8)*, type **2** (Update), beside the **Action** code you want to work with, then press **Enter** to display the *Activity Tracking Action Code Update panel (figure 10)*.

```
                         Computer Solutions, Inc.
                    Activity Tracking Action Code Update

                                Action Code
                                   CALL

Description  Call back______________________


Notify Management   N          (Y/N)
Letter Code         __________

Info1               156_______
Info2               __________
Info3               __________




                                                                Delete _
F1=Help  F3=Exit  F12=Cancel
```

Activity Tracking Action Code Update panel (figure 10)

2. Complete these fields:

Description
Type a description of the situation where you want this **Action** code to be used.

Notify Management
Type **Y**(es) or **N**(o) to indicate whether or not you want ***ORDER POWER!*** to automatically create a **Log Note** in the **Management Tracking Log** assigned to the **Representative** who uses this **Action Code**.

Letter Code
Future enhancement

Info fields 1 / 2 / 3
Type the information requested in these three user-defined fields. Your company defines these fields on *Company Profile Activity Tracking Profile panel 18.2 (figure 3)*.

3. Press **Enter** to update the **Action** code record.

To display an Activity Tracking Action Code

On the *Activity Tracking Action Code Inquiry panel (figure 8)*, type **5** (Display) to display the *Activity Tracking Action Code Display window* similar to *Activity Tracking Action Code Update panel (figure 10)*.

Resolution Codes

An **Activity Tracking Resolution** code describing the end result of an **Activity** or **Activity Detail**. **Resolution** codes accumulate statistical data, and are valuable for Activity reporting.

From the ***ORDER POWER!*** *Main Menu*, select: **Activity Tracking Resolution Code Inquiry** to display the *Activity Tracking Resolution Code Inquiry panel (figure 11)*.

```
 Pstn : _____             Computer Solutions, Inc.
                 Activity Tracking Resolution Code Inquiry   Show Deleted:  N

 2=Update  5=Display
     Resolution                               Notify
Opt     Code    Description                   Mgmnt     Del
 _     000      General Research



                                                                      Bottom
F1=Help F3=Exit F6=Create F7=Bkwd F8=Fwd F12=Cancel F17=Top F18=Bot F21=List
```

Activity Tracking Resolution Code Inquiry panel (figure 11)

These actions are available, in addition to the standard ***ORDER POWER!*** functions:

Action	Description
2=Update	Display *Activity Tracking Resolution Code Update (figure 13)* to work with an **Activity Tracking Resolution** code
5=Display	Display the *Activity Tracking Resolution Code Display window* to view the **Activity Tracking Resolution** code
F6=Create	Display the *Activity Tracking Resolution Code Prompt (figure 12)* to create a new **Activity Tracking Resolution** code

To create a new Activity Tracking Resolution Code

1. On the *Activity Tracking Resolution Code Inquiry panel (figure 11)*, press **F6** (Create) to display the *Activity Tracking Resolution Code Prompt (figure 12)*.

```
                 Computer Solutions, Inc.
          Activity Tracking Resolution Code Prompt

                      Resolution Code
                           _____

F1=Help  F3=Exit  F12=Cancel
```
Activity Tracking Resolution Code Prompt (figure 12)

1a. Complete this field:

Resolution Code
Type a code that you want to use to describe the reason for closing an **Activity** or **Activity Detail**. **Resolution** codes accumulate statistical data, and are valuable for Activity reporting.

1b. Press **Enter** to display the *Activity Tracking Resolution Code Update (figure 13)*.

To update an Activity Tracking Resolution Code

1. On the *Activity Tracking Resolution Code Inquiry panel (figure 11)*, type **2** (Update), beside the **Resolution** code you want to work with, then press **Enter** to display the *Activity Tracking Resolution Code Update (figure 13)*.

```
                 Computer Solutions, Inc.
          Activity Tracking Resolution Code Update

                      Resolution Code
                           000

Description  General Research______________

Notify Management   _          (Y/N)
Letter Code         __________

Info1               __________
Info2               __________
Info3               __________

                                                  Delete _
F1=Help  F3=Exit  F12=Cancel
```
Activity Tracking Resolution Code Update (figure 13)

2. Complete these fields:

Description
Type a description of the situation where you want this **Resolution** code to be used.

Notify Management
Type **Y**(es) or **N**(o) to indicate whether or not you want ***ORDER POWER!*** to automatically create a **Log Note** in the **Management Tracking Log** assigned to the **Representative** who uses this **Resolution** code.

Letter Code
Future enhancement

Info fields 1 / 2 / 3
Type the information requested in these three user-defined fields. Your company defines these fields on *Company Profile Activity Tracking Profile panel 18.2 (figure 3)*.

3. Press **Enter** to update the **Resolution** code record.

Activity Tracking Representatives

A **Representative** code is used only for **Activity Tracking**, and is independent of all other identifications on the AS/400 and in ***ORDER POWER!***. It may represent either a person or a department.

From the ***ORDER POWER!*** Main Menu, select: **Activity Tracking > Representative Code Inquiry** to display the *Activity Tracking Representative Inquiry panel (figure 14)*.

```
 Pstn : __________          Computer Solutions, Inc.
                     Activity Tracking Representative Inquiry   Show Deleted:  N

 2=Update  5=Display
                                                   Management
Opt  Rep User ID  Description                      Log Number    Del
 _   *Q           Activity Queue
 _   ACCOUNTING   Accounting Dept
 _   BONNIE       Bonnie Rogers
 _   CSIUSER      CSIUSER                           999000002
 _   ROSIE        Rosie Bluem                      999000001
 _   DEBBIE       Debbie
 _   ERNIE        Ernie Smith
 _   GARY         Gary Winstel
 _   LUIS         Luis L.
 _   MARIELA      Mariela
 _   NANCY        Nancy
 _   PADMA        Padmaja Paluri
 _   STAN         Stan Galper


                                                                      Bottom
F1=Help F3=Exit F6=Create F7=Bkwd F8=Fwd F12=Cancel F17=Top F18=Bot F21=List
```

Activity Tracking Representative Inquiry panel (figure 14)

These actions are available, in addition to the standard ***ORDER POWER!*** functions:

Action	Description
2=Update	Display *Activity Tracking Representative Code Update panel (figure 16)* to work with a **Representative** code
5=Display	Display the *Activity Tracking Representative Display window* to view a **Representative** code
F6=Create	Display the *Activity Tracking Representative Code Prompt panel (figure 15)* to create a new **Representative** code

To create a new Representative Code

1. On the *Activity Tracking Representative Inquiry panel (figure 14)*, press **F6** (Create) to display the *Activity Tracking Representative Code Prompt panel (figure 15)*.

```
                          Computer Solutions, Inc.
                  Activity Tracking Representative Code Prompt

                             Representative Code
                                ___________


 F1=Help  F3=Exit  F12=Cancel
```

Activity Tracking Representative Code Prompt panel (figure 15)

1a. Complete this field:

Representative

Type a code that you want to indicate a person or a department for purposes of **Activity Tracking** only. A **Representative** code is independent of all other identifications on the AS/400 and in ***ORDER POWER!***.

1b. Press **Enter** to display the *Activity Tracking Representative Code Update panel (figure 16)*.

To update a Representative Code

1. On the *Activity Tracking Representative Inquiry panel (figure 14)*, type **2** (Update) to display the *Activity Tracking Representative Code Update panel (figure 16)*.

```
                    Computer Solutions, Inc.
          Activity Tracking Representative Code Update

                      Representative Code
                           CSIUSER

 Name    CSIUSE______________________

 Representative Type   U           (User/Department)
?Mgmnt Tracking #   999000002

 Department Code    __________

 RP001              __________
 RP002              __________
 RP003              __________




                                                              Delete _
 F1=Help  F3=Exit  F4=?List  F12=Cancel
```
Activity Tracking Representative Code Update panel (figure 16)

2. Complete these fields:

Name
Type the name of an individual or a description of the department that this code belongs to.

Representative Type
Type **U**(ser)or **D**(epartment) to indicate if this **Representative** code belongs to an individual or a department.

Mgmnt Tracking #
Type a number of a **Management Tracking Log** that you have set up for the purpose of tracking certain codes used by this **Representative**. See page 30 for instructions on this topic.

Department Code
Type a user-defined code associated with an Activity Tracking department.

Info Fields 1 / 2 / 3
Type the information requested in these three user-defined fields. Your company defines these fields on *Company Profile Activity Tracking Profile panel 18.2 (figure 3)*.

3. Press **Enter** to update the **Representative** code record.

To display a Representative Code

On the *Activity Tracking Representative Inquiry panel (figure 14)*, type **5** (Display) to display the *Activity Tracking Representative Display window* similar to *Activity Tracking Representative Code Update panel (figure 16)*.

How to use Activity Tracking

After you have completed set up of the areas described on page 2, you can begin using **Activity Tracking.**

Starting Activity Tracking

From the ***ORDER POWER! Main Menu***, select ***Activity Tracking*** to display ***ORDER POWER!*** *Activity Tracking menu (figure 17).*

```
ATR01                      Computer Solutions, Inc.                6/19/01
CSIUSER                  ORDER POWER! Activity Tracking            DSP108S1

Select one of the following :
 1. Activity Tracking Inquiry           13. Reason Code Inquiry
                                        14. Action Code Inquiry
*2. Representative Productivity Report  15. Resolution Code Inquiry
*3. Activity Status Report              16. Representative Inquiry
*4. Aged Activity Report
*5. Vendor Performance Report
*6. Closed Activity Report






* = Work in progress                                                  More...
Selection
===> __

F1=Help  F3=Exit  F9=Command Line  F12=Cancel
                        Copyright 2001 Computer Solutions, Inc.  Version 4.0
```

ORDER POWER! *Activity Tracking menu (figure 17)*

These options are available, in addition to the standard ***ORDER POWER!*** functions:

Option	Description
1. Activity Tracking Inquiry	Display the *Activity Tracking Selection panel (figure 18)* to work with **Activities**
2. Representative Productivity Report	Work in progress
3. Activity Status Report	Work in progress
4. Aged Activity Report	Work in progress
5. Vendor Performance Report	Work in progress
6. Closed Activity Report	Work in progress
13. Reason Code Inquiry	Display the *Activity Tracking Reason Code Inquiry panel (figure 5)* to work with **Activity Tracking Reason** codes
14. Action Code Inquiry	Display the *Activity Tracking Action Code Inquiry panel (figure 8)* to work with **Activity Tracking Action** codes
15. Resolution Code Inquiry	Display the *Activity Tracking Resolution Code Inquiry panel (figure 11)* to work with **Activity Tracking Resolution** codes
16. Representative Inquiry	Display the *Activity Tracking Representative Inquiry panel (figure 14)* to **Activity Tracking Representative** codes

Working with Activities

An **Activity** is a job or project to be accomplished by a **Representative**, which may be either a person or department. You decide if an **Activity** will contain **Activity Details** (tasks) that further define the plan, depending on its complexity. **Activity Tracking Inquiry** allows you access to existing **Activities** and the ability to create new ones.

From the ***ORDER POWER!*** *Main Menu*, select: **Activity Tracking** > **Activity Tracking Inquiry** to display the *Activity Tracking Selection panel (figure 18)*.

```
Inquiry Option           Computer Solutions, Inc.
 Include Only           Activity Tracking Selection

Select one or both to display open Activity Headers and Details:
  ?Representative       CSIUSER
   Follow-Up Date       ________
Or, select one to display Activity Headers only:
  ?Customer Number      _________
  ?Order Number         _________
   Activity Number      _________
   Last Name or Company __________
   Order Date           ________
  ?Item Number          _______________
   Customer PO #        ____________________
  ?Purchase Order #     _________
  ?Vendor Number        _________
   INFO 1               __________

 Additional Selections :
  ?Select only Activity Type  _       (O/C/V/I/P/M or Blank)

F1=Help   F3=Exit   F4=?List   F6=Create   F12=Cancel   F14=RA Entry
F16=Next Call       F23=Toggle Inq Option  F24=More
```

Activity Tracking Selection panel (figure 18)

To work with Activities

1. Display existing **Activities** by completing one or more of the following fields. See the explanation of the **F23** function (at right) to better understand the results you will get by toggling that option.

Representative

Type a user-defined code that indicates which **Representative** whose **Activities** you want to see, or leave it blank for all **Representatives**.

A **Representative** code is used for **Activity Tracking** only, and is independent of all other identifications on the AS/400 and in ***ORDER POWER!***. It may represent either a person or a department.

These actions are available in addition to the standard ***ORDER POWER!*** functions:

Action	Description
F6=Create	Display the *Activity Header Maintenance panel (figure 22)* to create a new **Activity**
F14=RA Entry	Display the *Return Authorization Order Entry Selection panel* to work with **Return Authorizations**
F16=Next Call	Display the **Activity** in the **Activity Queue**. See "Working with the Activity Queue" on page 26 for details.
F23=Toggle Inq Option	Toggle between the **Include Only** and the begin **Starting at** display options to control which **Activities** are presented on the *Activity Tracking Inquiry selection panel (figure 19)* following an Inquiry
F24=More	Future enhancement

Follow-Up Date

Type the **Follow-Up Date** for which you want to see **Activities**. This date reflects either the **Follow-Up Date** you entered on the *Activity Header Maintenance panel (figure 22)* or the *Activity Log Detail Maintenance panel (figure 25)*.

Customer Number

Type a **Customer** number for which you want to see **Activities**.

Order Number

Type an **Order** number for which you want to see **Activities**.

Activity Number

Type an **Activity** number that you want to see.

Last Name or Company

Type a **Last Name** or **Company** for which you want to see **Activities**.

Order Date

Type an **Order Date** for which you want to see **Activities**.

Item Number

Type an **Item** number for which you want to see **Activities**.

Customer PO #

Type a **Customer Purchase Order** number for which you want to see **Activities**.

Purchase Order #

Type your **Purchase Order** number for which you want to see **Activities**.

Vendor Number

Type an **Vendor** number for which you want to see **Activities**.

Info field 1

The prompt for this field is user-defined **Info field 1**, which you defined on *Company Profile Activity Tracking Profile panel 18.2 (figure 3)*. Type a value for which you want to see **Activities**.

Select only Activity Type

Type a code that indicates which **Activity Types** you want to display, or leave this field blank to display all types.

O rder/Ordered Item **Activity**
C ustomer (non order) **Activity**
I tem related issues **Activity**
V endor related **Activity**
P urchase Order related **Activity**
M anagement/Misc **Activity**

2. Press **Enter** to display the *Activity Tracking Inquiry selection panel (figure 19)*. If you are using a color monitor, you will notice that the dates in the **Next Call** field are color-coded: red for past due, blue for the current date, and green for future dates.

```
                           Computer Solutions, Inc.
                           Activity Tracking Inquiry             Show Closed  Y
 2=Update  4=Delete  5=Display  6=Detail  7=Log Notes  8=Print  9=Reactivate
    Activity T S            Action
Opt  Number  Y T Rep Code   Code   Order #  Customer Name         Next Call Date
 _       107 O A ROSIE                      SEND SAMPLE           00/00/00
 _       107 O A ROSIE      000      106831 MARYANN BORDEN        06/01/01
 _       109 O A ROSIE      000      105523 WILLIAM BLACK         06/19/01
 _       111 O A ROSIE      000      106865 JUDY MILLER           07/01/01
 _       110 O A ROSIE      000      106864 MS LOUISE ANDREWS     07/10/01











                                                                         Bottom
  F1=Help     F3=Exit       F6=Create   F7=Bkwd    F8=Fwd   F10=Top   F11=Fold
  F12=Cancel  F14=RA Entry  F23=User    F24=More
```
Activity Tracking Inquiry selection panel (figure 19)

These actions are available, in addition to the standard ***ORDER POWER!*** functions:

Action	Description
2=Update	Display the *Activity Header Maintenance panel (figure 22)* to work with an **Activity**
4=Delete	Display *Activity Header Deletion window (figure 20)* to delete an **Activity**
5=Display	Display the *Activity Detail Display window* to view an **Activity** header
6=Detail	Display the *Activity Detail Inquiry panel (figure 24)* to work with **Activity Details**
7=Log Notes	Display the *Activity Note Inquiry/Maintenance panel (figure 27)* to work with **Activity Notes**
8=Print	Print an **Activity Log Listing**. See the sample on page 20.
9=Reactivate	Display the *Reactivation Prompt confirmation window (figure 21)* to create a new **Activity** based on one that was closed
F6=Create	Display the *Activity Header Maintenance panel (figure 22)* to create a new **Activity**
F11=Fold	Toggle the display to reveal additional fields for each **Activity** on the panel
F14=RA Entry	Display the Return Authorization Order Entry Selection panel to work with **Return Authorizations**
F24=More	Future enhancement

To create a new Activity

1. On the *Activity Tracking Inquiry selection panel (figure 19)*, press **F6** (Create) to display the *Activity Header Maintenance panel (figure 22)*.

To delete an Activity

Deleting an **Activity Header** also deletes all of its associated **Activity Details**, and the associated **Header** and **Detail Notes**.

1. On the *Activity Tracking Inquiry selection panel (figure 19)*, type **4** (Delete) beside the **Activity** you want to work with to display the *Activity Header Deletion window (figure 20).*

```
                            Computer Solutions, Inc.
  Active Only               Activity Tracking Inquiry
                                            =Log Notes  8=Print  9=Reactivate
          Activity Header Deletion
 O                                           Customer Name        Follow-Up Date
     Enter Deletion PASSWORD                 JULIAN ALVAREZ       00/00/00
                                             SEND SAMPLE          00/00/00
    F1=Help  F3/F12=Cancel                   MICHAEL ARMSTRONG    06/01/01
                                             JULIAN ALVAREZ       06/29/01
  _      111 O A ROSIE      000      106865 JULIAN ALVAREZ       07/01/01
  _      131 O A ROSIE      000      107275 MICHAEL ARMSTRONG    07/07/01
  _      110 O A ROSIE      000      106864 MICHAEL ARMSTRONG    07/10/01
  _      114 V A ROSIE                                            08/10/01




                                                                        Bottom
  F1=Help     F3=Exit       F6=Create   F7=Bkwd    F8=Fwd   F10=Top   F11=Fold
  F12=Cancel  F14=RA Entry  F23=User    F24=More
```

Activity Header Deletion window (figure 20)

2. Type the **Password to Delete Headers** you specified on *Company Profile Activity Tracking Profile panel 18.2 (figure 3)*, then press **Enter** to delete the **Activity**.

To display an Activity

On the *Activity Tracking Inquiry selection panel (figure 19)*, type **5** (Display) beside the **Activity** you want to see, to display the *Activity Detail Display window*, similar to *Activity Header Maintenance panel (figure 22).*

To print an Activity

On the *Activity Tracking Inquiry selection panel (figure 19)*, type **5** (Display) beside the **Activity** you want to print, then press **Enter** to print an 8.5 x 11” **Activity Log Listing** (see page 20).

Activity Log Listing

```
User: CSIUSER               COMPUTER SOLUTIONS, INC.         Page:        1
Wsid: DSP108S1                                               Date:  8/07/01
Prog: TR01504     Activity Log Listing                       Time: 10:46:53
Tracking #           107-O      Status Code          A
Order Number      106831        Return Auth Number
Cust Number         7700
Vendor Number       7700
Next Call Date 20/01/0601       PO Number
Description    Customize Item
Reason Code   BROKE                                 Date Opened   20/01/0619
Action Code   000                                   Date Closed
Resolve Code                                        Date of Order
Cust Svc Rep  ROSIE Rosie Bluem                    Date Reassign
Original Rep  ROSIE Rosie Bluem
Item Number    DS_01

                           LOG NOTES

                              * * ACTIVITY LOG DETAILS * *
Task Item      CUSTOMER FAX
               receive fax with logo
Next Call Date
Reason Code                                         Date Opened   20/01/0618
Action Code                                         Date Closed
Resolve Code
Cust Number
Vendor Number

                   ACTIVITY LOG DETAIL NOTES
                                                                 99999
Task Item      SEND SAMPLE
               send sample to customer
Next Call Date
Reason Code                                         Date Opened   20/01/0618
Action Code                                         Date Closed
Resolve Code
Cust Number
Vendor Number

End of report
```

To reactivate an Activity

1. On the *Activity Tracking Inquiry selection panel (figure 19)*, type **9** (Reactivate) beside the closed **Activity** you want to work with, then press **Enter** to display the *Reactivation Prompt confirmation window (figure 21).*

```
                          OP! 4.0 DEVELOPMENT - CO# 001
                            Activity Tracking Inquiry            Show Closed  N
 2=Update  4=Delete  5=Display  6=Detail  7=Notes  8=Print  9=Reactivate
    Activity T S                Action
Opt  Number  Y T Rep Code    Code   Order #  Customer Name        Item #
 _       142 C N MARYANN                     JOE CAMPBELL         A1
 _       143 O A CSIUSER     CALL     107472 CSI'S FAVORITE CUSTOM BOBZILLA
 9       144 M C *Q
 _       146 O N MIKE        CALL     107766 MIKE BUNNELL         TRAINS
 _       147 O N CSIUSER     CALL     108321 CSI'S FAVORITE CUSTOM
 _       150 M A CSIUSER
 _ 999000001 M A
 _ 999000002 M A
                                            Reactivation Prompt

                                Do you want to reactivate as a new Activity?


                                                    _   Y/N
                                  Answering "N" will reactivate the Header

  F1=Help     F3=Exit         F1=Help  F3=Exit  F12=Cancel
  F12=Cancel  F14=RA En
```

Reactivation Prompt confirmation window (figure 21)

2. Type **Y**(es) to create a new **Activity** based on one that was closed, or **N**(o) to remove the **Resolution** code and reopen the selected **Activity**.

Working with Activity Headers

The first panel of information associated with an **Activity**. On a complex **Activity**, this panel is a summary of the overall plan. On a simple **Activity**, this panel may contain all the necessary information.

To update an Activity Header

1. On the *Activity Tracking Inquiry selection panel (figure 19)*, type **2** (Update) beside the **Activity** you want to work with, then press **Enter** to display the *Activity Header Maintenance panel (figure 22).*

```
                          OP! 4.0 DEVELOPMENT - CO# 001
                           Activity Header Maintenance

 ?Activity Type   O
  Activity Number       107        ?Status Code A    (N/A/R/C)
 ?Order Number      106831         ?Hold Code   ___  ?Apply to _  (O/D/P/I/V)
 ?Customer Number     7700          MICHAEL ARMSTRONG            RFM:   66.0
 ?Item Number     DS_01             Test Item - D Bluem
 ?Vendor Number       7700          Tigger Industries & Production
  Return Auth #                     Customer PO #
  Follow-Up Date   6/01/01         ?Purchase Order #          /
  Description     Customize Item


 ?Reason Code     PERSL  Personalize an Item            Date Opened    6/19/01
 ?Action Code     000    General Research               Date Closed
 ?Resolution Code                                       Date of Order

 ?Current Rep  ROSIE      Rosie Bluem                  Date Reassign
  Original Rep ROSIE      Rosie Bluem                  Earliest Date  6/01/01

 F1=Help   F2=Unprotect  F3=Exit   F4=?List  F5=Details   F10=Addtl  F12=Cancel
 F13=Order Info  F14=Vendor Info   F18=Notes  F21=Print  F23=User   F24=More
```

Activity Header Maintenance panel (figure 22)

2. Complete these fields. Depending on the **Activity Type**, certain fields may be either required, or protected.

Activity Type (required on creation, protected thereafter)

Type a code to indicate which type of **Activity** you are creating. You cannot change this code on an existing **Activity**.

O rder/Ordered Item **Activity**
C ustomer (non order) **Activity**
I tem related issues **Activity**
V endor related **Activity**
P urchase Order related
M anagement/Misc **Activity**

Order Number

Type the **Order Number** related to this **Activity**.

These actions are available in addition to the standard ***ORDER POWER!*** functions:

Action	Description
F5=Details	Display the *Activity Detail Inquiry panel (figure 24)* for the **Activity** you are updating.
F10=Addtl	Display *Additional Activity Header Maintenance panel (figure 23)* to add additional information to this **Activity**
F14=Vendor Info	View the *Vendor Display panel* (if you entered a vendor on the **Activity**)
F18=Notes	Display the *Activity Note Inquiry/Maintenance panel (figure 27)* to work with **Log Notes**
F21=Print	Print an **Activity Log Listing**. (See the sample on page 21.)
F24=More	Future enhancement

Hold Code

Future enhancement

Apply to

Future enhancement

Customer Number

Type the **Customer Number** related to this **Activity**.

Item Number

Type the **Item Number** related to this **Activity**.

Vendor Number

Type the **Vendor Number** related to this **Activity**.

Return Auth #

Type the **Return Authorization Number** related to this **Activity**.

Follow-Up Date

Type the date that you want to review this **Activity**, and possibly perform the next step you have defined.

Description

Type a description of this **Activity**.

Status Code

Type a code to indicate the current status of an **Activity**. ***ORDER POWER!*** can maintain this field for you, or you can do it manually, depending on what you specified in the **Status Maintenance Method** field on *Company Profile Activity Tracking Profile panel 18 (figure 1)*.

N ew ***ORDER POWER!*** assigns this status to newly created orders.
A ctive ***ORDER POWER!*** changes the status from **N**(ew) to **A**(ctive) when you update an **Activity**.
R eassigned ***ORDER POWER!*** assigns this status when the **Representative** is changed.
C losed ***ORDER POWER!*** assigns this status when you enter a **Resolution** code.

Description

Type a description of the job/project you are setting up this **Activity** to track.

Reason Code

Type a user-defined **Reason** code that explains why you are creating this **Activity**.

Action Code

Type a user-defined **Action** code that indicates the next expected step in the process.

Resolution Code

Type a user-defined code that indicates the **Resolution** of this **Activity**.

Current Rep

Type the code of the **Representative** currently assigned to this **Activity**.

3. Press **Enter** to update the **Activity**. If you have specified on *Company Profile Activity Tracking Profile panel 18.2 (figure 3)* that any of the **Activity Header Info** fields are mandatory, then ***ORDER POWER!*** displays *Additional Activity Header Maintenance panel (figure 23)*.

To update Additional Activity Header information

1. The *Additional Activity Header Maintenance panel (figure 23)* displays when you:

   - Press **Enter** on the *Activity Header Maintenance panel (figure 22)*, and you have specified that any of the **Activity Header Info** fields are mandatory on *Company Profile Activity Tracking Profile panel 18.2 (figure 3)*.

   - or -

   - Press **F10** (Addtl) on the *Activity Tracking Inquiry selection panel (figure 19)*.

```
                    Computer Solutions, Inc.
                   Activity Header Maintenance

Activity Number       132 I       Status Code     A
Customer Number           /

INFO1        __________                   User Id       CSIUSER
INFO2        __________                   Wkstn Id      DSP108S1
INFO2        __________                   Create Date    7/09/01
                                          Creation Time  14:21:31
Prefill Contact Info From  _   (Customer/Vendor)
Contact Information:
 Full Name               ______________________________
 Address Line 1 of 3     ______________________________
 Address Line 2 of 3     ______________________________
 Address Line 3 of 3     ______________________________
 City, ?State            ____________________ , __
 Zip Code, ?Country      __________ , __
 Telephone Number        _______________  Ext ____     Fax _______________
 E-Mail Address  ____________________________________________________________

 F1=Help  F3=Exit  F6=Create  F7=Bkwd   F8=Fwd  F10=Top   F11=Fold  F12=Cancel
 F14=RA Entry      F15=ReSeq  F20=Toggle Sort   F23=User  F24=More
```
Additional Activity Header Maintenance panel (figure 23)

2. Complete these fields:

Info fields 1 / 2 / 3

Type the information requested in these three user-defined fields. Your company defines these fields on *Company Profile Activity Tracking Profile panel 18.2 (figure 3)*.

Prefill Contact Info From

Type a code to indicate if you want ***ORDER POWER!*** to complete the fields below using information from the **C**(ustomer) or **V**(endor record).

Contact Information

Type the information requested regarding the contact person for this **Activity**.

3. Press **Enter** to update the **Activity**.

To display an Activity Header

On the *Activity Tracking Inquiry selection panel (figure 19)*, type **5** (Display) beside the **Activity** you want to see, then press **Enter** to display the *Activity Header Display window* similar to *Activity Header Maintenance panel (figure 22)*.

Working with Activity Details

Activity Details are subtasks related to a specific **Activity**.

To work with Activity Details

1. On the *Activity Tracking Inquiry selection panel (figure 19)*, type **6** (Details), then press **Enter** to display the *Activity Detail Inquiry panel (figure 24)*.

```
  Activity       107 O     Computer Solutions, Inc.            Show Closed  Y
  Customize Item                                Activity Detail Inquiry
  2=Update  4=Delete  5=Display  6=Detail Notes      Sort by: Activity Date
     Entry  S                  Action               Date                   Activity
 Opt  Seq#  T Task Name        Code   Rep Code     Opened                    Date
  _      1  A CUSTOMER FAX            DEBBIE       6/18/01
  _      2  A SEND SAMPLE             ROSIE        6/18/01
  _      5  A TEST RUN                BONNIE       6/18/01
  _      6  A APPROVAL                DEBBIE       6/18/01
  _      3  A CAMERA CVT              NANCY        6/18/01                 1/01/01
  _      7  A PRODUCTION              ERNIE        6/18/01                 4/01/01
  _      4  A PREPARE ART             BONNIE       6/18/01                 7/15/01

                                                                            Bottom
  F1=Help     F3=Exit       F6=Create  F7=Bkwd   F8=Fwd     F10=Top   F11=Fold
  F12=Cancel  F14=RA Entry  F15=ReSeq  F20=Toggle Sort      F23=User  F24=More
```
Activity Detail Inquiry panel (figure 24)

These actions are available, in addition to the standard ***ORDER POWER!*** functions:

Action	Description
2=Update	Display *Additional Activity Detail Maintenance panel (figure* 26) to work with an **Activity Detail**
4=Delete	Deletes an **Activity Detail** (see page 28)
Reactivate	Reactivate a deleted **Activity Detail** (see page 28)
5=Display	Display the *Activity Detail Display window* to view an **Activity Detail**
6=Detail Notes	Display *Activity Note Inquiry/Maintenance panel (figure 27)* to work with **Activity Detail Notes**
F6=Create	Display the *Activity Log Detail Maintenance panel (figure 25)* to create a new **Activity Detail**
F11=Fold	Toggle the display to reveal additional fields for each **Activity Detail** on the panel
F14=RA Entry	Display the *Return Authorization Order Entry Selection panel* to work with **Return Authorizations**
F15=ReSeq	Renumber the **Alternative Display Sequence** of all displayed **Activities**, incrementing by 10. (The order will be unchanged.)
F20=Toggle Sort	Toggle the display sequence of **Activity Details** between: **Activity Date**, (user-defined alternative) **Optional Sort Sequence number**, **Detail Line number**, and **Detail Item Name**
F24=More	Future enhancement

To create a new Activity Detail

1. On the *Activity Detail Inquiry panel (figure 24)*, press **F6** (Create) to display the *Activity Log Detail Maintenance panel (figure 25).*

To create a new Activity Detail

1. On the *Activity Detail Inquiry panel (figure 24)*, type **2** (Change), beside the **Activity Detail** you want to work with, then press **Enter** to display the *Activity Log Detail Maintenance panel (figure 25).*

```
                    Computer Solutions, Inc.
                 Activity Log Detail Maintenance

 Log Number           116 C        Status Code   _     (N/A/R/C)
 Entry Seq#
 Task Name      _______________

?Customer Number _________
?Vendor Number   _________
 Follow-Up Date  ________            Alt Display Sequence __________

 Description    ________________________________________


?Current Rep    __________

?Reason Code    _____                                  Date Opened
?Action Code    _____                                  Date Closed
?Resolution Code _____


F1=Help                     F3=Exit    F4=?List     F10=Addtl   F12=Cancel
F14=Vendor Info   F18=Notes   F23=User   F24=More
```

Activity Log Detail Maintenance panel (figure 25)

2. Complete these fields:

These actions are available in addition to the standard ***ORDER POWER!*** functions:

Action	Description
F10=Addtl	Display the *Additional Activity Detail Maintenance panel (figure 26)* to add additional information to this **Activity Detail**
F18=Notes	Display the *Activity Note Inquiry/Maintenance panel (figure 27)* to work with **Log Notes**
F21=Print	Print an **Activity Log Listing**. (See the sample on page 21.)
F24=More	Future enhancement

Status Code

Type a code to indicate the current status of this **Activity Detail**.

New ***ORDER POWER!*** assigns this status to newly created orders.

Active ***ORDER POWER!*** changes the status from **N**(ew) to **A**(ctive) when you update an **Activity**.

Reassigned ***ORDER POWER!*** assigns this status when the **Representative** is changed

Closed ***ORDER POWER!*** assigns this status when you enter a **Resolution** code

Task Name

Type a description of the job you are setting up this **Activity Detail** to track.

Customer Number

Type the **Customer Number** related to this **Activity Detail**.

Vendor Number

Type the **Vendor Number** related to this **Activity Detail**.

Follow-Up Date

Type the date that you want to review this **Activity Detail**, and possibly perform the next step you have defined.

Alt Display Sequence

Type an **Alternative Sequence** number to specify the **Display Sequence** (relative to the **Alternative Sequence** of other **Activity Details** within this **Activity**). You can toggle between the **Alternative Display Sequence** and several other views of **Activity Details** on the *Activity Detail Inquiry panel (figure 24)*, by pressing **F20** (Toggle Sort).

Description

Type a description of the job you are setting up this **Activity Detail** to track.

Current Rep

Type the name of the **Representative** currently assigned to this **Activity Detail** .

Reason Code

Type a user-defined **Reason** code that explains why you are creating this **Activity Detail**.

Action Code

Type a user-defined **Action** code that indicates the next expected step in the process.

Resolution Code

Type a user-defined code that indicates the **Resolution** of this **Activity Detail**.

3. Press **Enter** to update the **Activity**. If you have specified on *Company Profile Activity Tracking Profile panel 18.2 (figure 3)* that any of the **Activity Detail Info** fields are mandatory, then ***ORDER POWER!*** displays the *Additional Activity Detail Maintenance panel (figure* 26).

To update Additional Activity Detail information

1. The *Additional Activity Detail Maintenance panel (figure* 26) displays when you:

   - Press **Enter** on the *Activity Log Detail Maintenance panel (figure 25)*, and you have specified that any of the **Activity Detail Info** fields are mandatory on *Company Profile Activity Tracking Profile panel 18.2 (figure 3)*.

   - or -

   - Press **F10** (Addtl) on the *Activity Tracking Inquiry selection panel (figure 19)*.

```
                    Computer Solutions, Inc.
                  Activity Detail Maintenance

Activity Number        116 C        Status Code     A
Customer Number           / 00000

PRIORITY     __________                  User Id
             __________                  Wkstn Id
             __________                  Create Date
                                         Creation Time
Contact Information:
 Full Name            ______________________________
 Address Line 1 of 3  ______________________________
 Address Line 2 of 3  ______________________________
 Address Line 3 of 3  ______________________________
 City, ?State         ____________________ , __
 Zip Code, ?Country   __________ , __
 Telephone            _______________  Ext ____     Fax ______________
 E-Mail Address  ____________________________________________________________
 Prefill Contact Info From  _   (Customer/Vendor)


F1=Help  F3=Exit  F12=Cancel  F18=Log Notes  F21=Print  F23=User  F24=More
```

Additional Activity Detail Maintenance panel (figure 26)

2. Complete these fields:

Info field 1

The prompt for this field is user-defined **Info field 1**, which you defined on *Company Profile Activity Tracking Profile panel 18.2 (figure 3)*. Type a value for which you want to see **Activities**.

Contact Information

Type the contact information in the appropriate fields.

Prefill Contact Info From

Type a code to indicate if you want ***ORDER POWER!*** to complete the fields below using information from the **C**(ustomer) or (**V**)endor record.

3. Press **Enter** to update the **Activity Detail**.

To delete an Activity Detail

On the *Activity Detail Inquiry panel (figure 24)*, type **4** (Delete) beside the **Activity Detail** you want to delete, then press **Enter** to delete the **Activity Detail**.

To reactivate a deleted Activity Detail

1. On the *Activity Detail Inquiry panel (figure 24)*, type **Y**(es) in the **Show Closed** field, then press **Enter** to display closed (deleted) **Activities**.

2. Type **2** (Update), beside the **Activity Detail** you want to reactivate, then press **Enter** to display the *Additional Activity Detail Maintenance panel (figure* 26).

To display an Activity Detail

On the *Activity Detail Inquiry panel (figure 24)*, type **5** (Display) beside the **Activity Detail** you want to see, to display the *Activity Detail Display window*, similar to *Activity Log Detail Maintenance panel (figure 25)*.

To work with Activity Detail Notes

On the *Activity Detail Inquiry panel (figure 24)*, type **6** (=Detail Notes) beside the **Activity Detail** you want to work with, then press **Enter** to display the *Activity Note Inquiry/Maintenance panel (figure 27)*. See "Working with Activity and Activity Detail Notes" in the following section for more details.

Working with Activity and Activity Detail Notes

Activity Notes are a history of events related to a particular **Activity** or **Activity Detail**. A note is always created automatically by ***ORDER POWER!*** when an **Activity** is first created. ***ORDER POWER!*** may also create **Activity Notes** if you typed **Y**(es) in the **Automatic Log Note Creation** field for these events on *Company Profile Activity Tracking Profile panel 18 (figure 1)*:

- when the **Notify Date** changes
- when the **Action Code** changes
- when the **Reason Code** changes
- when the **Resolution Code** changes
- when the **Representative** changes
- when a **Return Authorization** is maintained and/or received

To work with Activity or Activity Detail Notes

On the *Activity Tracking Inquiry selection panel (figure 19)*, type **7** (Log Notes)

- or -

On the *Activity Detail Inquiry panel (figure 24)*, type **6** (=Detail Notes)

…beside the **Activity** or **Activity Detail** you want to work with, then press **Enter** to display the *Activity Note Inquiry/Maintenance panel (figure 27)*. If you are working with an **Activity Detail**, the Detail information also displays at the upper right side of the panel.

```
                         Computer Solutions, Inc.         Show Deleted:  _
Activity #      115  Activity Note Inquiry/Maintenance
Customer       9473 CSI'S FAVORITE CUSTOMER
Descr      Send 3891*1010 to Customer

 5=Display                                                     Line #
 _  Customer Service Representative changed from       AND  *       1
 _  New Call Log Created at 15:37:48 on 06/26/01            *       2
 _  Resolution Code changed from       to 000               *       3
 _                                                                  4
 _                                                                  5
 _                                                                  6
 _                                                                  7
 _                                                                  8
 _                                                                  9
 _                                                                 10
 _                                                                 11
 _                                                                 12
 _                                                                 13
 _                                                                 14
 _                                                                 15
                                                                     More...
F1=Help F3=Exit F6=Create F7=Bkwd F8=Fwd F12=Cancel F17=Top F18=Bot F21=List
```

Activity Note Inquiry/Maintenance panel (figure 27)

To create a new Activity Note

1. On *Activity Note Inquiry/Maintenance panel (figure 27)*, press **F6** (Create) to display the *Activity Note Inquiry/Maintenance panel (figure 28)*.

```
                         Computer Solutions, Inc.         Show Deleted:  _
Activity #       115  Activity Note Inquiry/Maintenance
Customer        9473 CSI'S FAVORITE CUSTOMER
Descr      Send 3891*1010 to Customer

 5=Display                                                     Line #
 _  Customer Service Representative changed from       AND  *      1
 _  New Call Log Created at 15:37:48 on 06/26/01            *      2
 _  Resolution Code changed from       to 000               *      3
    _______________________________________________________        4
    _______________________________________________________        5
    _______________________________________________________        6
    _______________________________________________________        7
    _______________________________________________________        8
    _______________________________________________________        9
    _______________________________________________________       10
    _______________________________________________________       11
    _______________________________________________________       12
    _______________________________________________________       13
    _______________________________________________________       14
    _______________________________________________________       15
                                                                    More...
F1=Help F3=Exit F6=Create F7=Bkwd F8=Fwd F12=Cancel F17=Top F18=Bot F21=List
```
Activity Note Inquiry/Maintenance panel (figure 28)

2. Type the text you want to add on the first available line. You can continue and use as many lines as necessary.

3. When you have entered all the text you want to, press **Enter** to update the **Activity Note**.

Working with the Activity Queue

The **Activity Queue** is used to collect unassigned **Activities** until a **Representative** becomes available to handle them. When a **Representative** requests an **Activity** from the queue, ***ORDER POWER!*** then opens and assigns the lowest numbered **Activity** to that person or department.

The purpose of the **Activity Queue** is to allow the current **Representative** to pass along an **Activity** without necessarily knowing who will handle it next.

To assign an Activity to the Activity Queue

1. On the *Activity Tracking Inquiry selection panel (figure 19)*, type **2** (Update) beside the **Activity** you want to work with, then press **Enter** to display the *Activity Header Maintenance panel (figure 22)*.

2. Type ***Q** in the **Current Rep** field, then press **Enter** to update the **Activity**.

To retrieve the Next Call from the Activity Queue

1. Press **F16** (Next Call) on the *Activity Tracking Selection panel (figure 18)*, to retrieve the **Next Call** from the **Activity Queue**, and display it on *Activity Header Maintenance panel (figure 22)*.

Working with Management Tracking Logs

A **Management Tracking Log** is actually a **pseudo-activity**, set up for the purpose of recording the use of various codes by a specific **Representative** or department. A **Management Tracking Log** (pseudo-activity) is a record-keeping area, not an **Activity** that you want to be performed and completed.

A **Management Tracking Logs** are automatically created by ***ORDER POWER!*** using the number you type in the **Mgmnt Tracking #** field on *Activity Tracking Representative Code Update panel (figure 16)*.

What's in a Management Tracking Log?

It will contain automatically created **Log Notes** that ***ORDER POWER!*** writes when a **Representative** uses a code that you set up with **Y**(es) in the **Notify Management** field when the code was created.

Accessing Activity Tracking from other OP! programs

Since many of the **Activities** you will want to track are related to other ***ORDER POWER!*** programs, you can also access **Activity Tracking** from these other panels:

- *Order Entry Selection panel*
- *Mail List Update panel*
- *Item Update panel*
- *Vendor Update panel*
- *Purchase Order Detail Inquiry window*

To access Activity Tracking from other OP! programs

1. From any of the panels listed above, press **F24** (More Options) to display an *Additional Options window*, similar to the one below. The options vary depending on which program the window was called from.

```
                          OP! 4.0 DEVELOPMENT - CO# 001
                              Order Entry Selectio
                                                       Additional Options
 Customer Select
                                                      1=Select
 Power! Search             ___  ___  ___  ___  ___    _ Change Company
 Zip Code                  __________                 _ Order Statistics
 Telephone - Daytime       _______________            _ Batch Totals
 Company                   __________                 _ Activity Tracking Inq
 Last Name                 __________
 Customer #                _________


?Update Order #            _________
?Update Reference Order #  _________   ?Type _
?Prospect #

 Last Order Entered

                                                                        Bottom
 F1=Help  F2=Unprotect  F3=Exit  F4=?List   F6=Cre    F1=Help  F3=Exit
 F12=Cancel             F13=Defaults      F14=Pro     F12=Cancel
 F21=Return Auth Entry  F22=Print Confirm  F23=Ord
```

Additional Options window (figure 29)

2. Type **1** (Select) beside **Activity Tracking Inq**, then press **Enter** to display the *Activity Tracking Selection panel (figure 18).*