Lots of Activity is Going On

Published on November 20, 2016

ari schapira | Follow
Director Product Management at SAP

👍 52   💬 3   ↗ 32

Activities are great for documenting tasks, calls and other actions you take in order to get things done. The Activity is very flexible, allowing you to create endless number of activity types and subjects. Naturally, over time these lists grow and some of the types and subjects become obsolete. To allow better efficiency on the daily work, SAP Business One enables you to deactivate the types and subjects that are no longer required. This way the drop-down menus in the respective fields show only the relevant items. And… if something is missing, you can always set it as "Active" and bring it back!

Additional enhancements in managing activities enable you to re-open closed activities and remove activities that you no longer need to keep. Both options are available from within the context menu in the Activity window.

Activity					— □ ✕
Activity	Phone Call		Number		2
Type	General		BP Code	➡	C20000 Customer
Subject	Follow up		BP Name		Maxi-Teq
Assigned To	User Jayson Butler		Contact Person	➡	Norm Thompson
Assigned By	Jayson Butler		Telephone No.		020 5894 9487

General | Content | Linked Document | Attachments

Remarks

Start Time   16.11.16   09:44   Priority   Normal
End Time   16.11.16   09:59   Meeting Location
Duration   15 Minutes

Recurrence   None

Remove
Duplicate
Reopen
Related Activities

☐ Reminder   15 Minutes   ☐ Inactive   Follow Up
                                 ☑ Closed

OK   Cancel

Note that if you remove an activity, it does not appear in reports and you cannot display it by browsing back/forward.

Available in SAP Business One 9.2, version for SAP HANA PL03 and SAP Business One 9.2 PL03.

This tip and all the other tips are available on the Tip of the week SCN page. You can also visit the Implementation Arena for useful implementation tips.

👍   💬   ↪

---

ari schapira
Director Product Management at SAP
86 articles

Follow

---

3 comments   Newest ⌄

Sign in to leave your comment

Jehan Jarschel   ···   3mo
SAP Systems Analyst at WEG Group

Dave Gutman ··· 3mo
Founder and Chief Consultant at Advantage ERP Group, Inc

Excellent post Ari. Activities are one of the most under-utilized B1 features.

We use the Linked Documents option to provide an extensive audit trail for transactions that are likely to be reviewed in the future (i.e. Journal Entries with large amounts that occur rarely). The Attachments function is also a key - attach scanned documents, spreadsheets, etc. When the w

… See more

Like   Reply | 👍 2

There is 1 other comment. Show more.

Don't miss more articles by ari schapira

User Code Turns 25
ari schapira on LinkedIn

When a Customer is Also a Vendor
ari schapira on LinkedIn

More Data in BP Master Data
ari schapira on LinkedIn

Looking for more of the latest headlines on LinkedIn?

Discover more stories