
wActivities User Guide

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wActivities User Guide

Overview

wActivities for SugarCRM is a paid add-on that collects past and upcoming calls, meetings, emails, tasks, notes, and any custom Sugar activities in two filter-enabled subpanels and allows you to report data across those modules, such as reporting on every activity type your support team has had on a weekly basis. This guide covers how users and administrators can engage with wActivities for SugarCRM after it has been installed. For more information on installing wActivities to your Sugar instance, please refer to the [W-Systems Product Installation Guide](#).

Note: This guide pertains to the latest release of wActivities. If you are not using the latest version of wActivities, then you may not have access to some of the features listed on this page. Please refer to the [W-Systems Supported Platforms](#) page for more information on the latest package versions.

Features

- **Less Clicking:** wActivities collects your Sugar activities in two subpanels, significantly reducing the time it takes to check your planned and past activities.
- **Quickly Find Activities:** The wActivities subpanels allow you to search or filter through your team's schedules and activities
- **Enhanced Relationships:** Add additional modules where the activity records will be displayed, such as viewing a support call in the account record.
- **Multi-Module Reporting:** Report data from multiple modules, such as reporting on every activity type your support team has had on a weekly basis.
- **Easily Access Your Activities:** wActivities collects past and upcoming Calls, Meetings, Emails, Tasks, Notes, and any custom Sugar activities in two filter-enabled subpanels for quick and easy access, significantly reducing the time it takes to check your planned and past activities.
- **Search and Filter Activities:** The Activities and History subpanels allow you to create filters and quickly get an overview of your team's schedules and actions. You also have the ability to search for specific activity records using search keywords in the subject or description.
- **In-Depth Customization Options:** Go beyond standard Sugar activities—wActivities can be configured to sync with custom modules, allowing you to tailor your activities for your business needs.
- **Enhanced Module Relationships:** Enhanced module relationships enable






you to add additional modules where the activity records will be displayed. For instance, logging a call to a support case will also automatically link the call to the related account and allow you to quickly view the call activity in the account record.

- **Quickly Create Any Activity:** The Activities and History subpanels include Create actions for all of your activity types, allowing you to plan and log your calls, meetings, tasks, and much more with just a few clicks. You can also customize your available actions, and the default Create action.
- **Enhanced Historical Summary:** wActivities includes an enhanced version of Sugar's out-of-the-box Historical Summary, allowing you to create filters for your activities, and sort by fields.
- **Report on Multiple Modules:** As wActivities collects and aggregates all of your interactions in a single module, it enables you to report data from multiple modules, such as reporting on every activity type your support team has had on a weekly basis.
- **Detailed Historical Narrative:** If you need to take a more in-depth look at your activities and interactions, the Historical Narrative panel includes the full content of your records, including file attachments.
- **In-Depth Subpanels Customization:** The Activities and History subpanels included in our interaction management customization for Sugar enable you to update filters, actions, labels, and much more.

wActivities Administration

To administer wActivities, you will need **System Administrator** rights in Sugar.

The wActivities Settings section of the Administration page contains the following options:

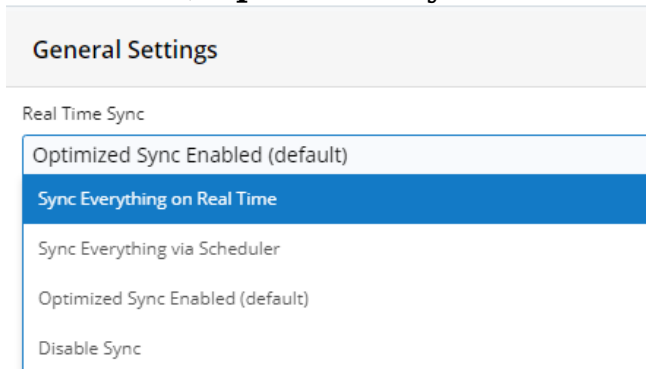
wActivities Settings			
Configure & Synchronize wActivities			
 General Settings	Configure: "Historical" buttons display, short description length, auto populate bcc field for emails	 Configure wActivities Modules	Enable/disable activities modules and configure mapping
 Configure wActivities Subpanels	Customize subpanels settings: enable/disable, change labels, icons labels and colors, filters and actions	 Stats and Sync Queue Manager	Manage and see stats about wActivities sync status
 Link wActivities To Parent	Show child wActivities data in parent Account record		

- [wActivities General Settings](#)
- [Configuring the wActivities Subpanel](#)
- [Configuring the wActivities Module](#)
- [Stats and Sync Queue Manager](#)
- [Link wActivities to Parent](#)

wActivities General Settings

In the **General Settings** section of the wActivities package, **Admin** users need to set the following options up before usage.

- **Real Time Sync** - users can choose from this dropdown field between four actions: **Sync Everything on Real Time**, **Sync Everything via Scheduler**, **Optimized Synch Enabled (default)**, and **Disable Sync**.



- **Number of records to synchronize per scheduled job run** - this field supports a value between 10 and 500 records, but it should be set to 100, ideally.

Number of records to synchronize per scheduled job run

Maximum number of records which should be processed by "wActivities Process Queue" Scheduler per run.

- **Short Description Length** - this field allows users to set the number of lines from the email body and supports a minimum value equal to 1.

Short Description Length: Number of Lines from email body

IMPORTANT: For affect the already synced Emails go to Administration > wActivities Settings > Sync Queue Manager and add all the Emails To Queue

- **Short Description Length** - this field allows users to set the number of characters for not emails and supports a minimum value equal to 1.

Short Description Length: Number of Characters for not Emails

IMPORTANT: For affect the already synced Records go to Administration > wActivities Settings > Sync Queue Manager and add all the records To Queue

- **Max crono execution time** - this is a field where users can set the number of minutes for the execution for the **wActivities Process Queue**. The field supports a minimum value equal to 1.

Max crono execution time (in minutes)

Maximum execution time (in minutes) for "wActivities Process Queue" Scheduler.

- **Display Historical Summary Button** - this field allows users to enable/disable the historical summary button for the email. Users need to select the modules for which the action applies.

Short Description Length: Number of Characters for not Emails

100

IMPORTANT: For select the already synced Records go to Administration > wActivities Settings > Sync Queue Manager and add all the records To Queue

Display Historical Narrative Button On

Accounts Contacts

Enable / Disable Historical Summary Button

- **Auto-Populate BCC Field For Emails** - this is a **Yes/No** field that allows users to set if they want or not wActivities to auto-populate the BCC field for emails.

Auto Populate BCC Field For Emails

Yes

Yes

No

- **Select what Email Address we will use** - this field allows users to set where the email address field will be taken from.

Select what Email Address we will use

Custom Email Address

Custom Email Address

Use the Email Archiving Address

- **Autopopulate with Email Address** - this field allows the **Admin user** to set a default email address for wActivities emails. To auto-populate the fields with more than one email address, these need to be separated by a semicolon.

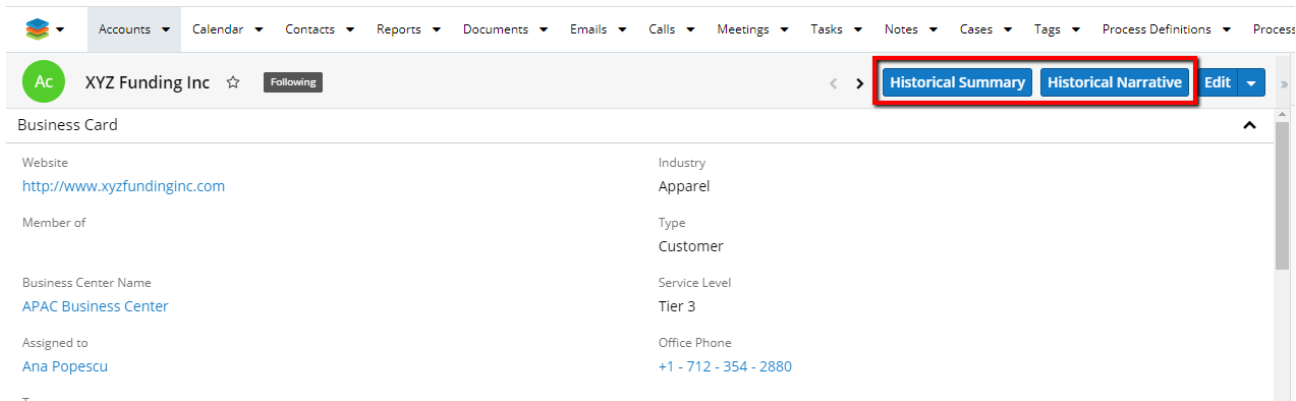
Autopopulate with Email Address

mbulacu@w-systems.com

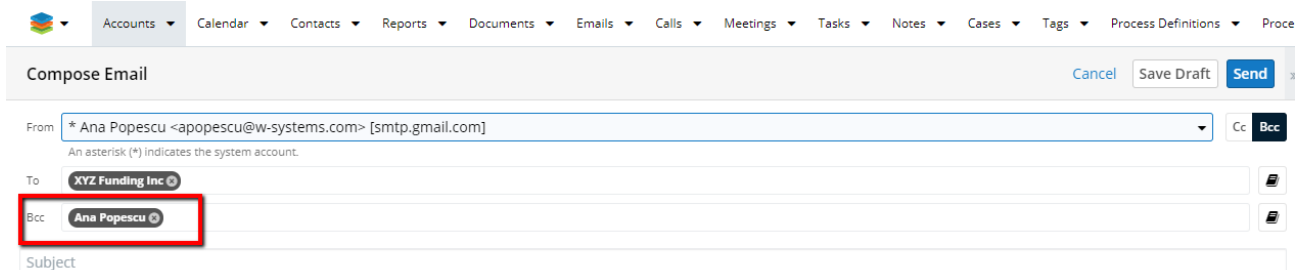
IF you want to autopopulate with multiple addresses please enter them separated by semicolon (;)

Once all the settings above are set, the "**Success General Settings has been successfully modified!**" message appears.

Now, the user will see the **Historical Summary** and **Historical Narrative** buttons displayed on the **Accounts** and **Contacts** modules.



The **BCC field** will also be auto-populated with a custom email address.



Configuring the wActivities Subpanel

This section allows the **Admin user** to customize the following:

- [Enable Customization](#)
- [Enable Subpanel](#)
- [Actions added by other modules](#)
- [Subpanel Label](#)
- [Module Icon Label](#)
- [Module Icon Color](#)
- [Enabled Search Filters / Buttons](#)
- [Buttons Display Type](#)
- [Enable Create Actions](#)
- [Sticky Action](#)
- [Actions Order](#)
- [Actions Labels](#)

These settings can be edited for the following modules: **Accounts**, **Contacts**, **Leads**, **Opportunities**, and **Prospects**. A default configuration can also be set.

Configure Subpanels Labels and Buttons

DefaultConfigs Accounts Cases Contacts Leads Opportunities Prospects Quotes

DefaultConfigs Subpanels Configs

wActivities

Enable Customization

Use Default Configs?
Uncheck for customize current subpanel

Enable Subpanel

Display Subpanel?
Uncheck disable this subpanel

Actions added by other modules

Deny Other Modules to Add Actions?
Check for try blocking other modules to add actions to this subpanel

Subpanel Label

Activities

Module Icon Label

WA

Module Icon Color

#BECBEC

Enable Customization

This option allows the user to select the default configurations for the wActivities package, for any of the following modules: **Accounts, Cases, Contacts, Leads, Opportunities, Prospects.**

Configure Subpanels Labels and Buttons

DefaultConfigs Accounts Cases Contacts Leads Opportunities Prospects Quotes

Accounts Subpanels Configs

wActivities

Enable Customization

Use Default Configs?
Uncheck for customize current subpanel

Enable Subpanel

Actions added by other modules

Subpanel Label

Activities

Module Icon Label

WA

Module Icon Color

#555

The **Use Default Configs** checkbox is ticked by default.

Enable Subpanel

Users can enable or disable the **wActivities** subpanel in **Record View** by ticking or unticking the **Display Subpanel** checkbox.

Configure Subpanels Labels and Buttons

DefaultConfigs Accounts Cases Contacts **Leads** Opportunities Prospects Quotes

Leads Subpanels Configs

wActivities

Enable Customization

Use Default Configs?
Uncheck for customize current subpanel

Enable Subpanel

Display Subpanel?
Uncheck disable this subpanel

Actions added by other modules

Subpanel Label

Activities

Module Icon Label

WA

Module Icon Color

#555555

Actions Added by Other Modules

This option allows users to deny other modules to add actions to the Actions menu in **Record View**. This configuration option is a checkbox and users can choose to enable or disable this action.

Accounts Calendar Contacts Reports Documents Emails Calls Meetings Tasks Notes C

Configure Subpanels Labels and Buttons

DefaultConfigs Accounts Cases Contacts Leads **Opportunities** Prospects Quotes

Opportunities Subpanels Configs

wActivities

Enable Customization

Use Default Configs?
Uncheck for customize current subpanel

Enable Subpanel

Display Subpanel?
Uncheck disable this subpanel

Actions added by other modules

Deny Other Modules to Add Actions?
Check for try blocking other modules to add actions to this subpanel

Subpanel Label

Activities

Module Icon Label

WA

Module Icon Color

#555555

For example, users can choose if they want to see the actions for other packages in the activities menu or not.

Op SuperG Tech - \$4643 - New - 198 Units ☆ Follow Edit

Account Name SuperG Tech Expected Close Date 2020-01-05

Likely \$1,200.00

Best \$1,200.00 Worst \$1,200.00

Tags Status Closed Won

- Share
- Find Duplicates
- Copy
- Historical Summary
- View Audit Log
- Delete
- Merge Document
- Merge Document to PDF

CUSTOMER JOURNEYS

Related All Filter All Records Search...

W/A ACTIVITIES (0) Select User... Search Type Clear Filters View All +

Type	Start Date	Assigned User	Subject	Description
No data available.				

W/H HISTORY (0) Select User... Search Type Clear Filters View All +

Type	Start Date	Assigned User	Subject	Description	Attachment
No data available.					

Op SuperG Tech - \$4643 - New - 198 Units ☆ Follow Edit

Account Name SuperG Tech Expected Close Date 2020-01-05

Likely \$1,200.00

Best \$1,200.00 Worst \$1,200.00

Tags Status Closed Won

CUSTOMER JOURNEYS

Related All Filter All Records Search...

W/A ACTIVITIES (0) Select User... Search Type Clear Filters View All +

Type	Start Date	Assigned User	Subject	Description
No data available.				

W/H HISTORY (0) Select User... Search Type Clear Filters View All +

Type	Start Date	Assigned User	Subject	Description	Attachment
No data available.					

- + Create Call In
- + Create Call Out
- + Create Meeting
- + Create Task
- + Create Note
- + Compose Email

C CALLS

Me MEETINGS

TS TASKS

Subpanel Label

The customization option lets the user define a label of choice for the **wActivities** subpanel.

The screenshot shows the Salesforce configuration interface for 'Prospects' subpanels. The 'wActivities' subpanel is highlighted with a red box, showing the 'Subpanel Label' field set to 'Activities Test'. Below this, a user profile for 'Ana Popescu' is shown, with a list of related records. The first record in the list is 'ACTIVITIES TEST', which is also highlighted with a red box.

Module Icon Label

This customization option allows users to define an **Icon Label** of choice for the wActivities subpanel.

Prospects Subpanels Configs

wActivities

Enable Customization

Use Default Configs?
Uncheck for customize current subpanel

Enable Subpanel

Display Subpanel?
Uncheck disable this subpanel

Actions added by other modules

Deny Other Modules to Add Actions?
Check for try blocking other modules to add actions to this subpanel


Subpanel Label

Activities Test

Module Icon Label

WA

Module Icon Color

 #E62525

Accounts Calendar Contacts Reports Documents Emails Calls Meetings Tasks Notes Cases Tags Process Definitions Process

Ta Ana Popescu ☆ Edit

Account Name	Title
XYZ Company	
Email Address	Department
apopescu@w-systems.com	
Mobile	Do Not Call
	<input type="checkbox"/>
Tags	

Show more...

Related All Filter All Records Search...

WA ACTIVITIES TEST Select User... Search Type Clear Filters View All +

CALLS +

Module Icon Color

Use the color picker in the customization panel to set a custom **Module Icon Color**.



Configure Subpanels Labels and Buttons

DefaultConfigs Accounts Cases Contacts Leads Opportunities **Prospects** Quotes

Prospects Subpanels Configs

wActivities

Enable Customization

Use Default Configs?
Uncheck for customize current subpanel

Enable Subpanel

Display Subpanel?
Uncheck disable this subpanel

Actions added by other modules

Deny Other Modules to Add Actions?
Check for try blocking other modules to add actions to this subpanel

Subpanel Label

Activities Test

Module Icon Label

WA

Enabled Search Filters / Buttons

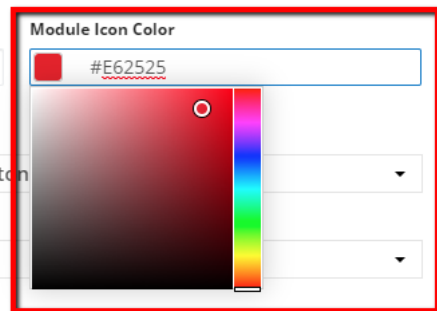
Filter: Assigned User Name, Filter: Name And Description, Filter: Activity Type , Button

Buttons Display Type

DropDown (Default)

Enabled Create Actions

Create Call, Create Call In, Create Call Out, Create Meeting, Create Task



Ana Popescu ☆

Edit ▾

Account Name Title
XYZ Company

Email Address Department
apopescu@w-systems.com

Mobile Do Not Call

Tags

Show more...

Related ▾ All Filter All Records Search...

WA	ACTIVITIES TEST (1)	Select User...	Search	Type	Clear Filters	View All	+ ▾
☆	Type	Start Date	Assigned User	Subject	Description		
	Call	2020-02-10 11:30	Ana Popescu	Call Ana Test			👁

Enable Search Filters or Buttons

Admin users can choose between three types of filters in this section: **Assigned User Name**, **Name and Description**, and **Activity Type**. Use the individual selection to **Select** or **Deselect** the available options.

Enabled Search Filters / Buttons

Filter: Assigned User Name, Filter: Name And Description, Filter: Activity Type , Button: View All

Select Enabled Search Filters / Buttons

Select All Deselect All

Filter: Assigned User Name	✓
Filter: Name And Description	✓
Filter: Activity Type	✓
Button: View All	✓

A fourth button option, **View All**, allows users to see all record types from the subpanel.

Button Display Type

This customization option allows users to choose between two types of button types: **Buttons** and **DropDown**. By default, the **Button Display Type** is set to **DropDown**.

Buttons Display Type

DropDown (Default)

Select Buttons Display Type

DropDown (Default)	✓
Buttons	

Note: The **DropDown** button type is the most frequently used, due to its flexibility.

Enable Create Actions

Here, users can select their actions of choice for the wActivities module. They can individually **Select** or **Deselect** any of the options provided.

Enabled Create Actions

Create Call, Create Call In, Create Call Out, Create Meeting, Create Task

Select Enabled Create Actions

Select All Deselect All

Create Call	✓
Create Call In	✓
Create Call Out	✓
Create Meeting	✓
Create Task	✓
Create Note	
Compose Email	

WA ACTIVITIES TEST (1) Select User... Search Type Clear Filters View All +

Type	Start Date	Assigned User	Subject	Description
Call	2020-02-10 11:30	Ana Popescu	Call Ana Test	

CI CALLS (1)

Subject	Status	Start Date	End Date	Assigned User
Call Ana Test	Scheduled	2020-02-10 11:30	2020-02-10 12:00	Ana Popescu

+ Create Call In
+ Create Call Out
+ Create Meeting
+ Create Task

Sticky Action

The **Sticky Action** functionality allows users to pre-define fast actions when the **Add** button is pressed.

Sticky Action

Create Call

Select Sticky Action

Create Call
Create Call In
Create Call Out
Create Meeting
Create Task
Create Note
Compose Email

Note: Only the actions configured from the **Enable Create Actions** can be configured as **Sticky Action**.

Actions Order

This field allows users to arrange the Actions they set by dragging and dropping them to the desired position.

Click and drag to reorder

▼

- ◆ Position #2 - Create Call Out
- ◆ Position #1 - Create Call In
- ◆ Position #3 - Create Meeting
- ◆ Position #4 - Create Task

Action Labels

Users can create **Action Labels** as desired, for every **Action** added in every module and Subpanel available.

Actions Labels

Label for: "Create Call" Action

LBL_FOR_WACTIVITIESSUBPANEL_PROSPECTS_WACTIVITIES_CREATE_CALL

Label for: "Create Call In" Action

LBL_FOR_WACTIVITIESSUBPANEL_PROSPECTS_WACTIVITIES_CREATE_CALL_IN

Label for: "Create Call Out" Action

LBL_FOR_WACTIVITIESSUBPANEL_PROSPECTS_WACTIVITIES_CREATE_CALL_OUT

Label for: "Create Meeting" Action

LBL_FOR_WACTIVITIESSUBPANEL_PROSPECTS_WACTIVITIES_CREATE_MEETING

Label for: "Create Task" Action

LBL_FOR_WACTIVITIESSUBPANEL_PROSPECTS_WACTIVITIES_CREATE_TASK

Actions Labels

Label for: "Create Call" Action

LBL_FOR_WHISTORYSUBPANEL_PROSPECTS_WACTIVITIES_CREATE_CALL

Label for: "Create Call In" Action

LBL_FOR_WHISTORYSUBPANEL_PROSPECTS_WACTIVITIES_CREATE_CALL_IN

Label for: "Create Call Out" Action

LBL_FOR_WHISTORYSUBPANEL_PROSPECTS_WACTIVITIES_CREATE_CALL_OUT

Label for: "Create Meeting" Action

LBL_FOR_WHISTORYSUBPANEL_PROSPECTS_WACTIVITIES_CREATE_MEETING

Label for: "Create Task" Action

LBL_FOR_WHISTORYSUBPANEL_PROSPECTS_WACTIVITIES_CREATE_TASK

Label for: "Create Note" Action

LBL_FOR_WHISTORYSUBPANEL_PROSPECTS_WACTIVITIES_CREATE_NOTE

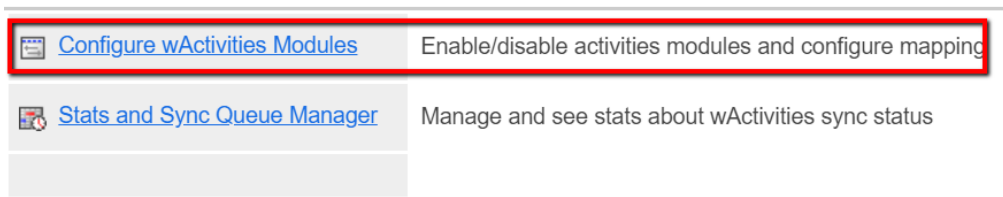
Label for: "Compose Email" Action

LBL_FOR_WHISTORYSUBPANEL_PROSPECTS_WACTIVITIES_COMPOSE_EMAIL

To keep the changes made on the **Configuration** page, press the **Save** button.

Configuring the Activities Module

The wActivities Module allows **Admin users** to configure and enable or disable activities, configure fields and add new custom fields. To manage this, go to the **wActivities** section of the **Administration** page and click the **Configure wActivities Modules** link.



The **Calls**, **Tasks**, **Emails**, **Notes**, and **Meetings** modules already have a default activities field mapping when the package is installed on a Sugar instance.

Enable/disable activities modules and configure mapping

Enabled modules as Activities:

Calls **Emails** **Meetings** **Notes** **Tasks**

Reindex Activities?

Fields of **wActivities** module

[+ Add New Field](#)

Fields of **Calls** module

[Click for Reset Mapping to default](#)

Fields of **Emails** module

[Click for Reset Mapping to default](#)

Fields of **Meetings** module

[Click for Reset Mapping to default](#)

Fields of **Notes** module

[Click for Reset Mapping to default](#)

Fields of **Tasks** module

[Click for Reset Mapping to default](#)

	Fields of wActivities module	Fields of Calls module	Fields of Emails module	Fields of Meetings module	Fields of Notes module	Fields of Tasks module
id	ID [id]	ID [id]	ID [id]	ID [id]	ID [id]	ID [id]
name	Subject [name]	Subject [name]	Subject [name]	Subject [name]	Subject [name]	Subject [name]
date_entered	Date Created [date_entered]	Date Created [date_entered]	Date Created [date_entered]	Date Created [date_entered]	Date Created [date_entered]	Date Created [date_entered]
date_modified	Date Modified [date_modified]	Date Modified [date_modified]	Date Modified [date_modified]	Date Modified [date_modified]	Date Modified [date_modified]	Date Modified [date_modified]
account_name	No Mapping	No Mapping	No Mapping	No Mapping	No Mapping	No Mapping
account_id	No Mapping	No Mapping	No Mapping	Account ID [account_id]	No Mapping	No Mapping
bean_id	ID [id]	ID [id]	ID [id]	ID [id]	ID [id]	ID [id]
bean_module	Internal Field	Internal Field	Internal Field	Internal Field	Internal Field	Internal Field
assigned_user_id	Assigned User [assigned_user_id]	Assigned To [assigned_user_id]	Assigned User Id [assigned_user_id]	Assigned User Id [assigned_user_id]	Assigned User Id [assigned_user_id]	Assigned User Id [assigned_user_id]
attachment_ids	No Mapping	Attachments [attachments_coll]	No Mapping	ID [id]	No Mapping	No Mapping
attachment_paths	No Mapping	No Mapping	No Mapping	No Mapping	No Mapping	No Mapping
attachment_names	No Mapping	Attachments [attachments]	No Mapping	Attachment [filename]	No Mapping	No Mapping
category_id	No Mapping	No Mapping	No Mapping	No Mapping	No Mapping	No Mapping

Users can **Reindex Activities** by ticking the corresponding checkbox.



Accounts

Contacts

Opportunities

Leads

Calendar

Enable/disable activities modules and configure mapping

Enabled modules as Activities:

Calls **Emails** **Meetings** **Notes** **Tasks**

Reindex Activities?

Users can also reset mapping to default settings for each module by clicking the red link.

Fields of **Calls** module

[Click for Reset Mapping to default](#)

Fields of **Emails** module

[Click for Reset Mapping to default](#)

Fields of **Meetings** module

[Click for Reset Mapping to default](#)

Fields of **Notes** module

[Click for Reset Mapping to default](#)

Adding Custom Fields

The wActivities package allows users to add custom fields to different modules.

Note: In case your wActivities table is too large (e.g. 10 K records), users need to resync all wActivities. Go to the **Administration** page and follow the steps:

1. Starts and **Sync Manager > wActivities: Flush All**
2. **Configure wActivities Module > Create Custom Fields**
3. **Stats and Sync Manager > Perform Queue Now.**

Module		Queue Status											
Name	Enabled As Activity	Invalid		Queued		Processing		Synchronized		Skipped		Failed	
		Active	Deleted	Active	Deleted	Active	Deleted	Active	Deleted	Active	Deleted	Active	Deleted
Calls	Yes	0	0	0	0	0	0	31	0	0	0	0	0
Emails	Yes	0	0	0	0	0	0	27	0	0	0	0	0
Meetings	Yes	0	0	0	0	0	0	31	0	0	0	0	0
Notes	Yes	0	0	0	0	0	0	29	0	0	0	0	0
Tasks	Yes	0	0	0	0	0	0	27	0	0	0	0	0

To add new fields, use the "Add New Field" option.

	Fields of Calls module	Fields of Emails module	Fields of Meetings module	Fields of Notes module	Fields of Tasks module
id	ID [id]	ID [id]	ID [id]	ID [id]	ID [id]
name	Subject [name]	Subject [name]	Subject [name]	Subject [name]	Subject [name]
date_entered	Date Created [date_entered]	Date Created [date_entered]	Date Created [date_entered]	Date Created [date_entered]	Date Created [date_entered]
date_modified	Date Modified [date_modified]	Date Modified [date_modified]	Date Modified [date_modified]	Date Modified [date_modified]	Date Modified [date_modified]
account_name	No Mapping	No Mapping	No Mapping	No Mapping	No Mapping
account_id	No Mapping	No Mapping	No Mapping	Account ID [account_id]	No Mapping

This will open a new drawer where users can create a new field type.

Add New Field

Name: w_cstm_test

Label: test

System Label: LBL_W_CSTM_TEST

Type: TextField

Database Type: Varchar

Required:

Buttons: Cancel, Save

For configuration of other features that aren't available here (Min, Max, Default Values, Calculated Value, Dependencies, Full Text Search and others) please use Studio After you add the field from here!

This functionality is similar to the one found in Studio. However, creating fields in Studio does not support adding a series of configuration options that are available here (Min, Max, Default Values, Calculated Value, Dependencies, Full Text Search).

After adding new Custom Fields, users need to update them, if no mapping is applied to the field.

Enabled modules as Activities:

[Calls](#) [Emails](#) [Meetings](#) [Notes](#) [Tasks](#)

Reindex Activities ?

Fields of wActivities module
[+ Add New Field](#)

	Fields of Calls module Click for Reset Mapping to default	Fields of Emails module Click for Reset Mapping to default	Fields of Meetings module Click for Reset Mapping to default	Fields of Notes module Click for Reset Mapping to default	Fields of Tasks module Click for Reset Mapping to default
status	Status [status]	Email Status [status]	Status [status]	No Mapping	Status [status]
status_id	No Mapping	No Mapping	No Mapping	No Mapping	No Mapping
subcategory_id	No Mapping	No Mapping	No Mapping	No Mapping	No Mapping
subpanel_name	Internal Field	Internal Field	Internal Field	Internal Field	Internal Field
team_id	Team Id [team_id]	Team Id [team_id]	Team Id [team_id]	Team Id [team_id]	Team Id [team_id]
w_czm_test	No Mapping	No Mapping	No Mapping	No Mapping	No Mapping
custom_field_1	Change Field Type and Label No Mapping	Type [type]	No Mapping	No Mapping	No Mapping

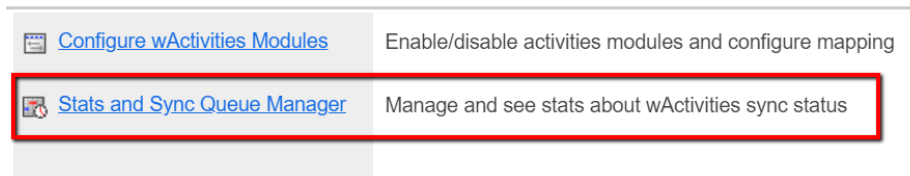
Fields that are already mapped will have the "Update" button disabled.

To keep your Custom Fields and changes, users need to enable the desired modules and Save their changes. If the settings are successfully updated, a pop up message will appear: "Success Fields mappings were saved successfully!"

Stats and Sync Queue Manager

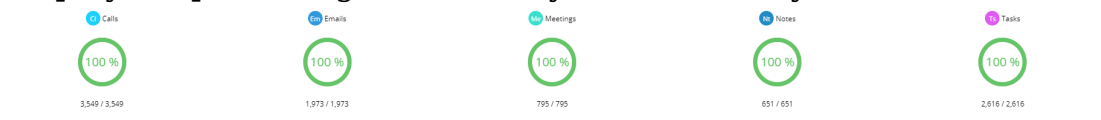
The **Stats and Sync Queue Manager** section of the **Administration** page allows admin users to manage and see statistics about the sync queue.

1. Go to the **wActivities** section on the **Administration** page.



2. Go to the **Sats and Sync Queue Manager** link on this section.

At the top of the page, there is a status for each module enabled. The status displays in percentages how many records are synchronized.



Activities Records Stats

This expandable section allows the admin user to see the **Stats** for each enabled module.

Activities Records Stats - ▶ Update Stats Now													
Module Name	Stats											Last Updated	Actions
	Counters						Unsynced			Orphaned	Total Synced		
	Active		Deleted		Total		Deleted	Modified	Missing				
Source	wActivities	Source	wActivities	Source	wActivities	Deleted	Modified	Missing	Orphaned	Total Synced			
Calls	3,549	3,549	0	0	3,549	3,549	0	0	0	0	100.00 %	2020-02-10 06:22 UTC	Clean Orphaned Records
Emails	1,962	1,962	11	11	1,973	1,973	0	0	0	0	100.00 %	2020-02-10 06:22 UTC	Clean Orphaned Records
Meetings	795	795	0	0	795	795	0	0	0	0	100.00 %	2020-02-10 06:22 UTC	Clean Orphaned Records
Notes	651	651	0	0	651	651	0	0	0	0	100.00 %	2020-02-10 06:22 UTC	Clean Orphaned Records
Tasks	2,616	2,616	0	0	2,616	2,616	0	0	0	0	100.00 %	2020-02-10 06:22 UTC	Clean Orphaned Records

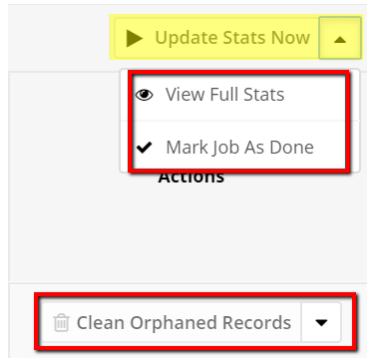
Module records are split into two categories:

1. **Counters** - this category includes module records that are **Active**, **Deleted**, and a counter for the **Total** number of module records.
2. **Unsynced** - this category includes module records that fall into one of the following sub-categories: **Deleted**, **Modified**, and **Missing**.

This page will also show information regarding **Orphaned records**.

Users can also see a total number of synced records for each enabled module and also the date of the **Last Update** in the designated column.

The **Configure Activities Modules** page also allows users to perform different actions from the **Activities Records Stats** menu.



1. **Update Stats Now** - this action lets users manually run the scheduler job and manually update all modules.
2. **View Full Stats** - this action displayed the then View And Manage Counters queue;
3. **Mark Job as Done**
4. **Clean Orphaned Records** - this option allows users to clean records that exist in the wActivities module but are deleted from the database table.

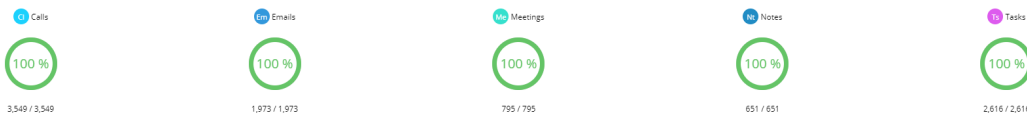
Sync Queue Summary

This section allows users to requeue records for any module they want. To sync records that are not synced, follow the steps below.

1. **Choose Start / End Date**
2. Select the module you want to requeue for sync from the **Activity Name** dropdown field
3. Pres the **Queue Queries** button
4. Press **Process Now**

Module		Queue Status												Process Queue Now		
Name	Enabled As Activity	Invalid		Queued		Processing		Synchronized		Skipped		Failed		View Full Queue	Queue: Flush All Records (Empty Queue)	
		Active	Deleted	Active	Deleted	Active	Deleted	Active	Deleted	Active	Deleted	Active	Deleted			
📞 Calls	Yes	0	0%	0	0	0	0%	0	31	0	0	0%	0	0	0%	0
✉️ Emails	Yes	0	0%	0	0	0	0%	0	27	0	0	0%	0	0	0%	0
🗨️ Meetings	Yes	0	0%	0	0	0	0%	0	31	0	0	0%	0	0	0%	0
📝 Notes	Yes	0	0%	0	0	0	0%	0	29	0	0	0%	0	0	0%	0
📌 Tasks	Yes	0	0%	0	0	0	0%	0	27	0	0	0%	0	0	0%	0

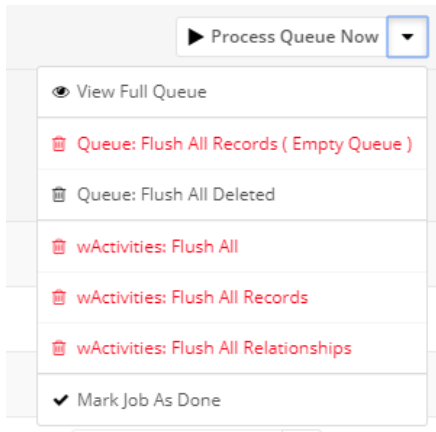
A second method to synchronize all records from a module is to click on the percentages icon and wait for records to synchronize.



The **Sync Queue Summary** menu provides eight additional actions:

- View Full Queue
- Process Queue Now (for all modules)
- Flush all deleted
- Flush All Records (Empty Queue)
- Mark Job As Done
- wActivities: Flush All
- wActivities: Flush All Records
- wActivities: Flush All Relationships

For each module, there are available some other options:



Link wActivities to Parent

This configuration option allows users to link **Child activities** in different modules (**Calls, Meetings, Tasks, Notes, or Emails**) to a **Parent Account**.

From the **wActivities Settings** section on the **Administration** page, access the **Link wActivities to Parent** section.

wActivities Settings

Configure & Synchronize wActivities

General Settings	Configure: "Historical" buttons display, short description length, auto populate bcc field for emails
Configure wActivities Subpanels	Customize subpanels settings: enable/disable, change labels, icons labels and colors, filters and actions
Link wActivities To Parent	Show child wActivities data in parent Account record

Link wActivities To Parent

General Accounts

General Configurations

Link wActivities Automatically to Parent Record?

Enabled
Disabled
Enabled

Enabled Parents

Accounts

Choose the Child module by using the "**Populate wActivities From**" in the **Accounts** section of the page.

Accounts Contacts Opportunities Le

Link wActivities To Parent

General **Accounts**

Configurations for **Accounts** parent module

After selecting the module, users can choose which activity types need to be inherited for each **Child module**.

The screenshot shows the configuration interface for linking activities. The top section is for the 'Accounts' parent module, where 'Populate wActivities From' is set to 'Contacts', 'Opportunities', 'Leads', 'Cases', and 'Quotes'. The bottom section is for the 'Contacts' child module, where 'Link following wActivities from child' is set to 'Calls', 'Emails', 'Meetings', 'Notes', and 'Tasks'. The 'Child to Parent link' is set to 'Account ID [Id]'.

In the following example, we will link only the **Calls** and **Meetings** activities from the **Opportunities** module to the Parent Account.

The screenshot shows the configuration interface for linking activities. The top section is for the 'Opportunities' parent module, where 'Populate wActivities From' is set to 'Opportunities'. The bottom section is for the 'Opportunities' child module, where 'Link following wActivities from child' is set to 'Calls' and 'Emails'. The 'Child to Parent link' is set to 'Account ID [Id]'.

1. Create a new Account without configuring any activities and create a new opportunity under it.

The screenshot shows a CRM record for an account named 'Link Activities'. The record is assigned to 'Ana Popescu' and is in the 'Banking' industry. Below the record details, there is a section for 'CUSTOMER JOURNEYS' with a table of related records. The 'CALLS' and 'MEETINGS' rows are highlighted with a red box.

Related	All	Filter	All Records	Search...	Refresh	Grid	Close
CALLS							
MEETINGS							
OPPORTUNITIES (1)							

Name	Status	Expected Close Date	Likely	Assigned User	
Link Activities - Child Opp	In Progress	2020-02-29	\$5,000.00	Ana Popescu	

2. Go to **Opportunities** and create new activities: **Calls / Meetings / Tasks / Notes / Emails**.

Best \$5,000.00 Worst \$5,000.00
Tags Status In Progress

Show more...

CUSTOMER JOURNEYS

Related **All** Filter **All Records** Search...

CALLS (1)

Subject	Status	Start Date	End Date	Assigned User
Opp C1	Scheduled	2020-02-10 16:00	2020-02-10 16:30	Ana Popescu

MEETINGS (1)

Subject	Status	Start Date	End Date	Assigned User
Opp M1	Scheduled	2020-02-10 16:00	2020-02-10 16:30	Ana Popescu

TASKS (1)

Subject	Status	Contact	Start Date	Due Date	Assigned
Opp T1	Not Started				Ana Popescu

NOTES (1)

Subject	Last Modified	Date Created	Assigned User
Opp N1	2020-02-10 15:55	2020-02-10 15:55	Ana Popescu

3. Go to the **Parent Account** and see that only the **Calls** and **Meetings** records from the **Opportunities** module are linked to the Account **wActivities** and **wHistory** subpanels.

MEETINGS (1)

Name	Status	Expected Close Date	Legacy	Assigned User
Link Activities - Child Opp	In Progress	2020-02-29		Ana Popescu

OPPORTUNITIES (1)

Name	Status	Expected Close Date	Legacy	Assigned User
Link Activities - Child Opp	In Progress	2020-02-29		Ana Popescu

ACTIVITIES (2)

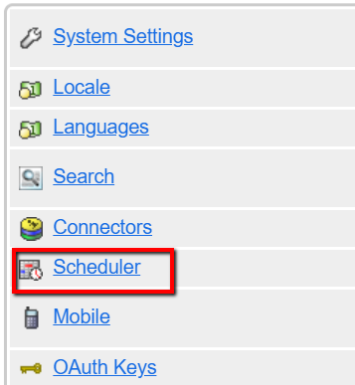
Type	Start Date	Assigned User	Subject	Description
Meeting	2020-02-10 16:00	Ana Popescu	Opp M1	
Call	2020-02-10 16:00	Ana Popescu	Opp C1	

Scheduler Job

New Scheduler Jobs are created when the wActivities package is installed. Go to the **Scheduler** section on the **Administration** page.

System

Configure the system-wide settings ac



- **wActivities Process Queue** (Job: wActivities Process Activities Queue Records)
- **wActivities Calculate Stats** (Job: wActivities Calculate Stats)
- **wActivities Clean Queue** (Job: wActivities Clean Queue)

Usage

- [Activities Subpanel](#)
- [History Subpanel](#)
- [Subpanel Functions](#)
- [wActivities Module](#)

wActivities is a functionality that groups the enabled activities (**Calls, Tasks, Meetings, Notes, and Emails**) for a record, based on their scheduling status (**Scheduled / Held**).

Once installed, the wActivities package will automatically create:

- 1 Module, the **wActivities module**;
- 2 Subpanels, the **Activities** and **History** subpanels;
- 2 Buttons, the **Historical Summary** and **Historical Narrative** buttons.

These will be available in **Record View** for the following modules:

- **Accounts**: also displays the activities from the linked contacts;
- **Contacts**
- **Opportunities**

- **Leads**
- **Targets**

When a new activity is created, a clone of that record is saved in the **wActivities module** and will be displayed in the corresponding **wActivities subpanel**, based on its scheduling status.

Activities Subpanel

Users can find in the **Activities subpanel** activities with either of the following statuses: **Scheduled, Not Started, In Progress, Pending Input.**

The Activities subpanel will display the following activity types:

- **Calls.** Records with a status of **Scheduled**;
- **Meetings.** Records with a status of **Scheduled**;
- **Tasks.** Records with a status of **Not Started / In Progress / Pending Input.**

CALLS (4)						
	Subject	Status	Start Date	End Date	Assigned User	
☆	Bad time, will call back	Held	2020-02-17 09:00	2020-02-17 09:30	Ana Popescu	
☆	Discuss review process	Held	2020-02-17 09:00	2020-02-17 09:30	Ana Popescu	
☆	Call back	Cancelled	2020-02-17 09:00	2020-02-17 09:30	Ana Popescu	
☆	Call Ana 1	Scheduled	2020-02-11 13:00	2020-02-11 13:30	Ana Popescu	

MEETINGS (5)						
	Subject	Status	Start Date	End Date	Assigned User	
☆	Meeting with Ana2	Scheduled	2020-02-29 09:00	2020-02-29 09:30	Ana Popescu	
☆	Follow-up on proposal	Held	2020-02-26 09:00	2020-02-26 09:30	Ana Popescu	
☆	Introduce all players	Held	2020-02-13 09:00	2020-02-13 09:30	Ana Popescu	
☆	Discuss pricing	Held	2020-02-17 09:00	2020-02-17 09:30	Ana Popescu	
☆	Meeting with Ana	Scheduled	2020-02-11 13:00	2020-02-11 13:30	Ana Popescu	

TASKS (4)						
	Subject	Status	Contact	Start Date	Due Date	Assigned User
☆	Setup evaluation	Not Started	Lisa Castillo	2020-02-17 08:45	2020-02-24 08:45	Ana Popescu
☆	Call to schedule meeting	Not Started	Melissa Fox	2020-02-09 08:45	2020-02-25 08:45	Ana Popescu
☆	Setup evaluation	Pending Input	Christine Stephens	2020-02-27 08:43	2020-02-27 08:43	Ana Popescu
☆	Send Email	In Progress	Jennifer Weaver	2020-02-21 08:42	2020-02-21 08:42	Ana Popescu

ACTIVITIES (5 of 6+)						
	Type	Start Date	Assigned User	Subject	Description	
☆	Task	2020-02-17 08:45	Ana Popescu	Setup evaluation		
☆	Task	2020-02-09 08:45	Ana Popescu	Call to schedule meeting		
☆	Task		Ana Popescu	Setup evaluation		
☆	Task		Ana Popescu	Send Email		
☆	Meeting	2020-02-29 09:00	Ana Popescu	Meeting with Ana2		

The **Activities subpanel** has five (5) default columns.

1. **Type.** This is a label for the activity type.
2. **Start Date.** The Start Date of the activity, mapped on the Administration page.
3. **Subject.** This column contains a hyperlink to the original record.
4. **Description.** This column includes a description of each activity type, as it was mapped for each module.
5. **Assigned User.** This column contains the assigned user for each activity type, mapped during the Configuration phase for each module.

WA ACTIVITIES (7)		Select User...	Search	Type	Clear Filters	View All	+ ▼
	Type	Start Date	Assigned User	Subject	Description		
☆	Task	2020-02-17 08:45	Ana Popescu	Setup evaluation			👁️ ▼
☆	Task	2020-02-09 08:45	Ana Popescu	Call to schedule meeting			👁️ ▼
☆	Task		Ana Popescu	Setup evaluation			👁️ ▼
☆	Task		Ana Popescu	Send Email			👁️ ▼
☆	Meeting	2020-02-29 09:00	Ana Popescu	Meeting with Ana2			👁️ ▼
☆	Meeting	2020-02-11 13:00	Ana Popescu	Meeting with Ana			👁️ ▼
☆	Call	2020-02-11 13:00	Ana Popescu	Call Ana 1			👁️ ▼

History Subpanel

The **History subpanel** includes all calls, meetings, tasks, notes, and email activity types with the **Held**", **Cancelled**", or **Deferred**" status.

Activity types displayed in the **History** subpanel:

- **Notes**
- **Emails**
- **Calls** (Held or Canceled status)
- **Meetings** (Held or Canceled status)
- **Tasks** (Completed or Deferred status).

The **History** subpanel has six default columns:

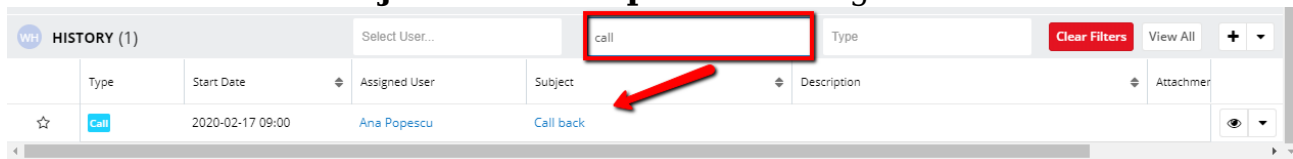
- **Type:** This column contains a label for the activity type (Email In / Email Out / Email **Draft** / **Email Archived**).
- **Start Date:** This column contains the start date of the activity, mapped during the Configuration step.
- **Subject:** This column contains a hyperlink to the original record.
- **Description:** This column contains a description of the activity, mapped during the Configuration step.
- **Attachment:** This column contains a note or email record.
- **Assigned User:** The assigned user of the activity, mapped during the configuration step.

Subpanel Functions

Activities automatically creates two new subpanels in **Record View** upon installation: the **History** subpanel and the **Activities** subpanel. Both subpanels come with the following buttons and functionalities:

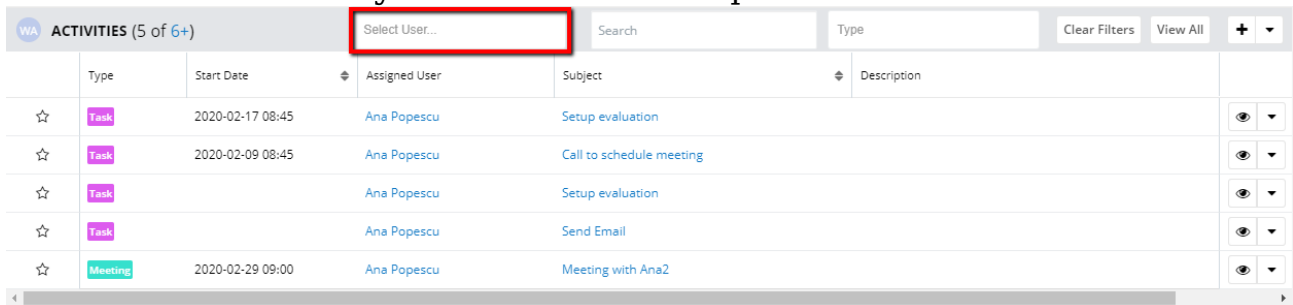
Search by Subject

The **Search by Subject** functionality is a search field type filter that displays in the subpanel filtered results by the entered characters. The search results will have the will have **Subject** or **Description** starting with the entered characters.

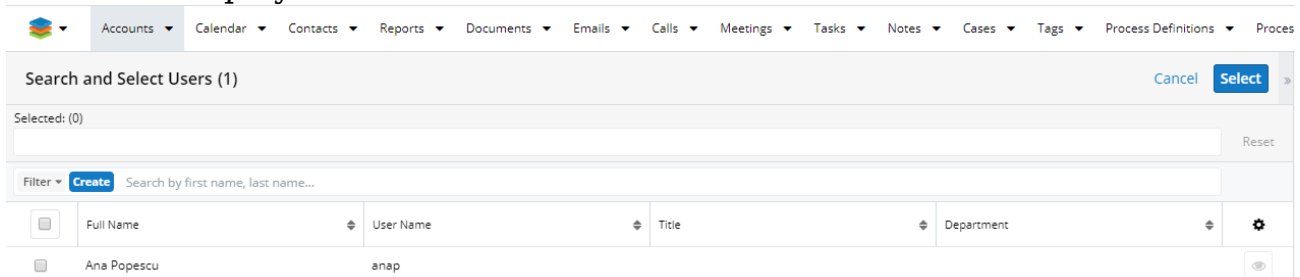


Select User

Users can use the Search and Select function to filter records by the **Assigned User** from the **History** and **Activities** subpanels.



If the users select this function, a list with the assigned users of the subpanel records is displayed.



When a user is selected from the drawer, the subpanel will filter the activities and records based assigned to the selected user.

WA ACTIVITIES (5 of 6+)

Assigned User: Ana Popescu

Type	Start Date	Assigned User	Subject	Description
Task	2020-02-17 08:45	Ana Popescu	Setup evaluation	
Task	2020-02-09 08:45	Ana Popescu	Call to schedule meeting	
Task		Ana Popescu	Setup evaluation	
Task		Ana Popescu	Send Email	
Meeting	2020-02-29 09:00	Ana Popescu	Meeting with Ana2	

Select Type

This is a multi-select field type that allows users to filter the activity records by activity type.

WA ACTIVITIES (5 of 6+)

Select User...

Type: [Calls, Emails, Meetings, Notes, Tasks]

Type	Start Date	Assigned User	Subject	Description
Task	2020-02-17 08:45	Ana Popescu	Setup evaluation	
Task	2020-02-09 08:45	Ana Popescu	Call to schedule meeting	
Task		Ana Popescu	Setup evaluation	
Task		Ana Popescu	Send Email	
Meeting	2020-02-29 09:00	Ana Popescu	Meeting with Ana2	

Choosing an activity type or more will display in the subpanel only the activities with the selected label(s).

WA ACTIVITIES (4)

Select User...

Type: Tasks

Type	Start Date	Assigned User	Subject	Description
Task	2020-02-17 08:45	Ana Popescu	Setup evaluation	
Task	2020-02-09 08:45	Ana Popescu	Call to schedule meeting	
Task		Ana Popescu	Setup evaluation	
Task		Ana Popescu	Send Email	

Clear

The clear functionality is an Activity button that removes all filters applied to the subpanel. All records in the subpanel will be displayed after clearing the filters.

WA ACTIVITIES (5 of 6+)		Select User...	Search	Type	Clear Filters	View All	+	▼
Type	Start Date	Assigned User	Subject	Description				
☆ Task	2020-02-17 08:45	Ana Popescu	Setup evaluation					
☆ Task	2020-02-09 08:45	Ana Popescu	Call to schedule meeting					
☆ Task		Ana Popescu	Setup evaluation					
☆ Task		Ana Popescu	Send Email					
☆ Meeting	2020-02-29 09:00	Ana Popescu	Meeting with Ana2					

View All

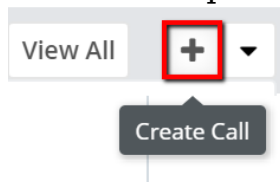
The **View All** button allows users to see all activity types in the Activities subpanel.

WA ACTIVITIES (5 of 6+)		Select User...	Search	Type	Clear Filters	View All	+	▼
Type	Start Date	Assigned User	Subject	Description				
☆ Task	2020-02-17 08:45	Ana Popescu	Setup evaluation					
☆ Task	2020-02-09 08:45	Ana Popescu	Call to schedule meeting					
☆ Task		Ana Popescu	Setup evaluation					
☆ Task		Ana Popescu	Send Email					
☆ Meeting	2020-02-29 09:00	Ana Popescu	Meeting with Ana2					

(+) Quick Create

The **Quick Create** button (+) can be set to **Create Call** action type. However, it can be configured from the **Configure wActivities** section on the **Administration** page.

1. When pressed from the **Activities** subpanel, the drawer for the **Create Call** action will open with a default status of **Scheduled**.
2. When pressed from the **History** subpanel, the drawer for the **Create Call** action will open with a default status of **Held**.

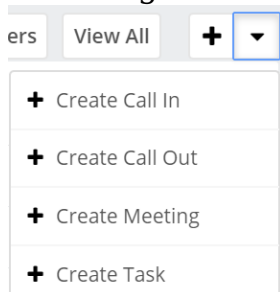


Actions Dropdown Menu

The **Actions Dropdown Menu** can be found in the subpanel's header. It gives users the possibility to create new records for the default enabled modules. Each

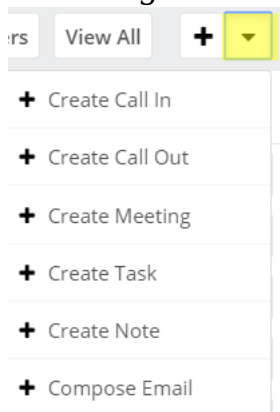
wActivity subpanels have different default buttons that can be configured from the **Administration** page.

- The **Actions** drop down menu on the **Activities** subpanel has activated the following actions:



1. **Create Call In:** When the button is pressed, the **Create Call** drawer will open with default values **Status: Scheduled** and **Direction: Inbound**.
2. **Create Call Out:** When pressed, the **Create Call** drawer will open with default values **Status: Scheduled** and **Direction: Outbound**.
3. **Create Meeting:** When pressed, the **Create Meeting Drawer** will open with a default status value of **Scheduled**.
4. **Create Task:** When pressed, the action will open the Create Task drawer with a default status value of **Scheduled**.

- The **Actions** drop down menu on the **History** subpanel has activated the following actions:



1. **Create Call In:** When the button is pressed, the **Create Call** drawer will open with default values **Status: Scheduled** and **Direction: Inbound**.
2. **Create Call Out:** When pressed, the **Create Call** drawer will open with default values **Status: Held** and **Direction: Outbound**.
3. **Create Meeting:** When pressed, the Create Meeting Drawer will open with a default status value of **Held**.
4. **Create Task:** When pressed, the action will open the Create Task drawer with a default status value of **Completed**.
5. **Create Note or Attachment:** This action will open a drawer for the **Create Note or Attachment drawer**.

- Compose Email:** This action allows users to create a new email by pressing on the **Compose Email** button from the **History** subpanel. Clicking on the **Compose Email** action will open a new window.

Preview

The **Preview** button allows users to see a preview of the original record on the Intelligence Pane when it is pressed.

The screenshot displays the 'Test Account Activities' interface. The main panel shows a list of activities with columns for Type, Start Date, Assigned User, Subject, and Description. A 'Preview' pane is open on the right, showing details for a 'Follow-up on proposal' meeting, including its status (Held), start and end dates, location, and meeting type (Sugar).

Inline Actions

The **Inline Actions** menu from the wActivities subpanel has action for **Edit** , **Unlink** , or **Close** actions for the corresponding record.

- On the **Activities** Subpanel, the **Inline Actions** dropdown menu includes the following actions:

This close-up screenshot shows the 'ACTIVITIES (5 of 6+)' subpanel. The 'Actions' dropdown menu is highlighted with a red box, indicating the location of the inline actions.

- Edit:** The button opens a drawer with the corresponding record in edit mode.
- Unlink:** The button unlinks the corresponding activity from the current record. Once removed, the activity will also be removed from the Activities subpanel and the record's original subpanel.

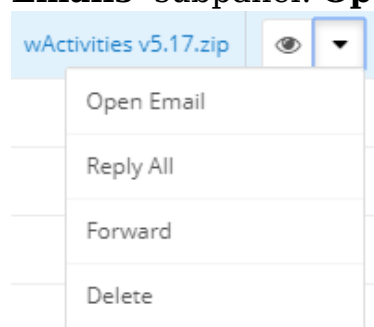
3. **Close:** The button will complete the activity and change its status to Held or Completed. It will also move the record to the History subpanel.

- On the **History** Subpanel, the **Inline Actions** dropdown menu includes the following actions:

wH HISTORY (6)		Select User...	Search	Type	Clear Filters	View All	+	▼
	Type	Start Date	Assigned User	Subject	Description	Attachment		
☆	Meeting	2020-02-26 09:00	Ana Popescu	Follow-up on proposal			👁	▼
☆	Meeting	2020-02-13 09:00	Ana Popescu	Introduce all players			👁	▼
☆	Meeting	2020-02-17 09:00	Ana Popescu	Discuss pricing			👁	▼
☆	Call	2020-02-17 09:00	Ana Popescu	Bad time, will call back			👁	▼
☆	Call	2020-02-17 09:00	Ana Popescu	Discuss review process			👁	▼
☆	Call	2020-02-17 09:00	Ana Popescu	Call back			👁	▼

1. **Edit:** The button will open a drawer with the corresponding record in Edit mode. When the changes are saved, the wActivities record and the original corresponding record will be updated.
2. **Unlink:** The button will unlink the activity from the record from the wActivities panel and from its original subpanel.

For email records, the **Inline Actions** available are the same as the ones on the **Emails** subpanel: **Open Email** , **Reply All** , **Forward** , and **Delete**.



wActivities Module

The **wActivities Module** is available on the navigation bar. This is a read-only module that cannot be edited by users.

Accounts Calendar Contacts Reports Documents Emails Calls Meetings Tasks Notes Cases Tags Process Definitions Processes **wActivities**

wActivities (20 of 21+)

Filter **Create** Search by subject...

	Name	Original Activity	Activity Type	Last Sync	Date Modified	Parent	Contact	Account	Status	Subpanel	Start Date	Due Date	Assigned to
<input type="checkbox"/>	wActivities v5.1...	Original Note: ...	Notes	2020-02-17 08:...	2020-02-17 08:...					History	2020-02-17 08:53		Ana Popescu
<input type="checkbox"/>	Last email	Original Email: ...	Emails	2020-02-17 08:...	2020-02-17 08:...	Test Account A...		Test Account A...	Draft	History	2020-02-17 08:54		Ana Popescu
<input type="checkbox"/>	Setup evaluation	Original Task: S...	Tasks	2020-02-17 08:...	2020-02-17 08:...	Test Account A...	Lisa Castillo	Test Account A...	Not Started	Activities	2020-02-17 08:45	2020-02-24 08:...	Ana Popescu
<input type="checkbox"/>	Call to schedul...	Original Task: ...	Tasks	2020-02-17 08:...	2020-02-17 08:...	Test Account A...	Melissa Fox	Test Account A...	Not Started	Activities	2020-02-09 08:45	2020-02-25 08:...	Ana Popescu
<input type="checkbox"/>	Setup evaluation	Original Task: S...	Tasks	2020-02-17 08:...	2020-02-17 08:...	Test Account A...	Christine Steph...	Test Account A...	Pending Input	Activities		2020-02-27 08:...	Ana Popescu
<input type="checkbox"/>	Send Email	Original Task: S...	Tasks	2020-02-17 08:...	2020-02-17 08:...	Test Account A...	Jennifer Weaver	Test Account A...	In Progress	Activities		2020-02-21 08:...	Ana Popescu
<input type="checkbox"/>	Meeting with A...	Original Meeti...	Meetings	2020-02-17 08:...	2020-02-17 08:...	Test Account A...		Test Account A...	Scheduled	Activities	2020-02-29 09:...	2020-02-29 09:...	Ana Popescu
<input type="checkbox"/>	Follow-up on p...	Original Meeti...	Meetings	2020-02-17 08:...	2020-02-17 08:...	Test Account A...		Test Account A...	Held	History	2020-02-26 09:...	2020-02-26 09:...	Ana Popescu
<input type="checkbox"/>	Introduce all pl...	Original Meeti...	Meetings	2020-02-17 08:...	2020-02-17 08:...	Test Account A...		Test Account A...	Held	History	2020-02-13 09:...	2020-02-13 09:...	Ana Popescu
<input type="checkbox"/>	Discuss pricing	Original Meeti...	Meetings	2020-02-17 08:...	2020-02-17 08:...	Test Account A...		Test Account A...	Held	History	2020-02-17 09:...	2020-02-17 09:...	Ana Popescu
<input type="checkbox"/>	Bad time, will c...	Original Call: B...	Calls	2020-02-17 08:...	2020-02-17 08:...	Test Account A...		Test Account A...	Held	History	2020-02-17 09:...	2020-02-17 09:...	Ana Popescu
<input type="checkbox"/>	Discuss review ...	Original Call: Di...	Calls	2020-02-17 08:...	2020-02-17 08:...	Test Account A...		Test Account A...	Held	History	2020-02-17 09:...	2020-02-17 09:...	Ana Popescu

Configuring wActivities Subpanel Columns

- [Studio](#)
- [Historical Narrative](#)

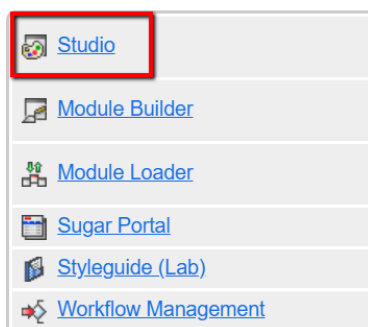
Studio

The columns displayed on the wActivities subpanels can be configured in Studio.

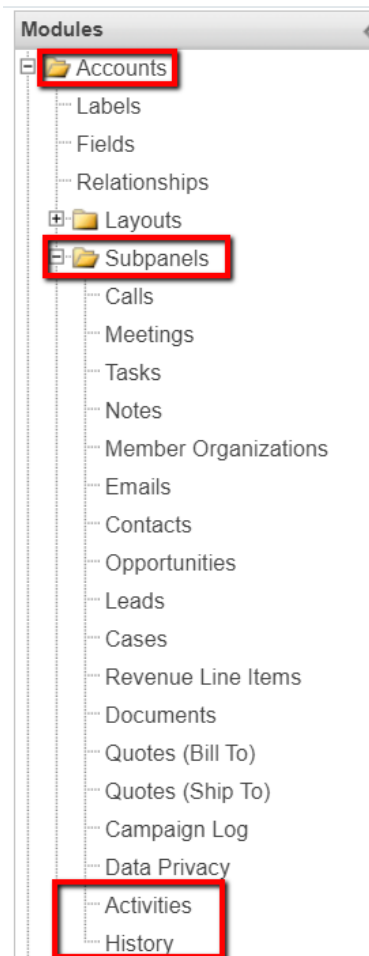
Go to the **Studio** section available on the **Developer Tools** subpanel.

Developer Tools

Create and edit modules and module



Go to the Module where you want to apply the configuration options and choose **Subpanels**.



Enable Custom Modules

The following modules are enabled and configured by default for **wActivities**: **Calls, Tasks, Meetings, Notes, and Emails.**

Note: These module configurations should not be changed!

Enable/disable activities modules and configure mapping

Enabled modules as Activities:

Calls **Emails** **Meetings** **Notes** **Tasks**

Reindex Activities?

Fields of **wa_wActivities** module
+ Add New Field

Fields of **Calls** module
Click for Reset Mapping to default

Fields of **Emails** module
Click for Reset Mapping to default

Fields of **Meetings** module
Click for Reset Mapping to default

Fields of **Notes** module
Click for Reset Mapping to default

Fields of **Tasks** module
Click for Reset Mapping to default

	Fields of Calls module Click for Reset Mapping to default	Fields of Emails module Click for Reset Mapping to default	Fields of Meetings module Click for Reset Mapping to default	Fields of Notes module Click for Reset Mapping to default	Fields of Tasks module Click for Reset Mapping to default
id	ID [id]	ID [id]	ID [id]	ID [id]	ID [id]
name	Subject [name]	Subject [name]	Subject [name]	Subject [name]	Subject [name]
date_entered	Date Created [date_entered]	Date Created [date_entered]	Date Created [date_entered]	Date Created [date_entered]	Date Created [date_entered]
date_modified	Date Modified [date_modified]	Date Modified [date_modified]	Date Modified [date_modified]	Date Modified [date_modified]	Date Modified [date_modified]
account_name	No Mapping	No Mapping	No Mapping	No Mapping	No Mapping
account_id	No Mapping	No Mapping	No Mapping	Account ID [account_id]	No Mapping
bean_id	ID [id]	ID [id]	ID [id]	ID [id]	ID [id]
bean_module	Internal Field	Internal Field	Internal Field	Internal Field	Internal Field
assigned_user_id	Assigned User [assigned_user_id]	Assigned To [assigned_user_id]	Assigned User Id [assigned_user_id]	Assigned User Id [assigned_user_id]	Assigned User Id [assigned_user_id]
attachment_ids	No Mapping	Attachments [attachments_coll]	No Mapping	ID [id]	No Mapping
attachment_paths	No Mapping	No Mapping	No Mapping	No Mapping	No Mapping
attachment_names	No Mapping	Attachments [attachments]	No Mapping	Attachment [filename]	No Mapping
category_id	No Mapping	No Mapping	No Mapping	No Mapping	No Mapping

Users can enable other modules and change the configuration options by following the steps:

1. Go to the **Administration page** and click on the **Configure Activities Module hyperlink**.
2. Select the modules from the **Module dropdown** list and check if the field details are displayed.
3. Select the corresponding Module fields on the left side of the list for the **wActivity Fields**.
4. Save the Configuration and check if the "**Fields mapping were saved successfully!**" message is displayed.
5. Go to **Stats and Sync Queue** to synchronize the old records of the newly enabled activity modules.

- Choose a Start / End Date
- Select the enabled module from the Activity Name dropdown menu
- Press on Queue Queries
- Process Queue Now.

Historical Summary

The **Historical Summary** button shows the record from the **History** subpanel. The button is available for the **Accounts** and **Contacts** modules in **Record View** mode.

The screenshot shows a CRM interface with a top navigation bar containing various menu items like Accounts, Calendar, Contacts, Reports, Documents, Emails, Calls, Meetings, Tasks, Notes, Cases, Tags, Process Definitions, and Process. Below this, there's a header for 'Test Account Activities' with a 'Following' status. A 'Business Card' tab is active, showing details like Website (https://www.w-systems.com), Date Modified (2020-02-17 09:12 by Ana Popescu), Business Center Name (EMEA Business Center), Assigned to (Ana Popescu), and Industry (Apparel). A 'Historical Summary' button is highlighted with a red box, and a 'Historical Narrative' button is also visible.

The button opens a **List View** drawer with all **wActivities** from the **History** subpanel.

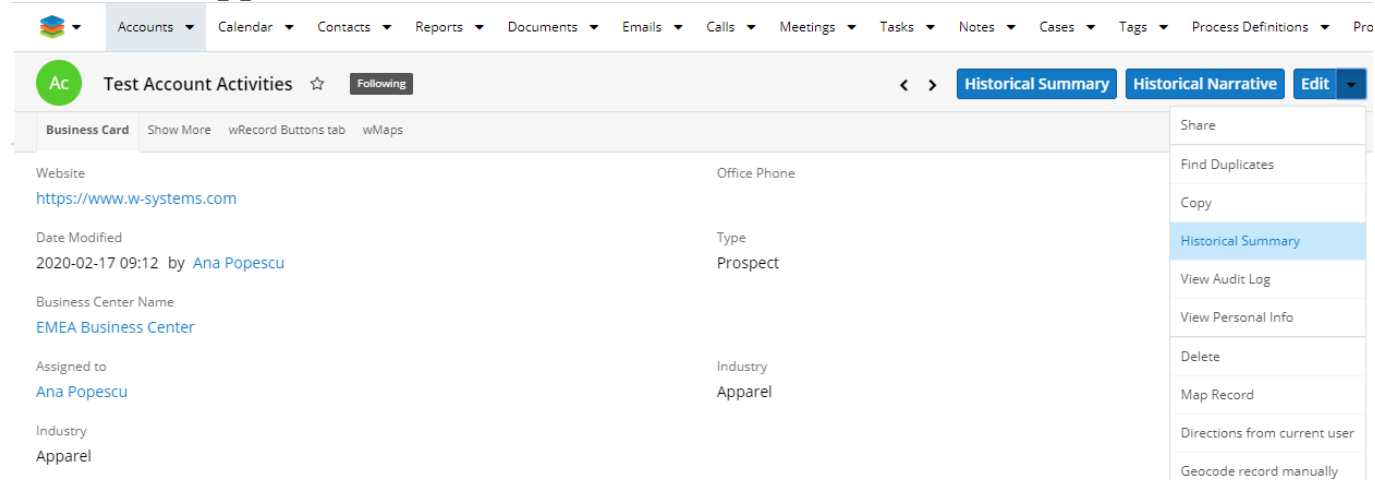
The screenshot shows a 'Historical Summary for "Test Account Activities" Account (7)' drawer. It features a table with columns for Type, Start Date, Subject, Status, Description, Email To, Email From, Related To, Contact, Account, Date Modified, and User. The table contains seven rows of activity data.

Type	Start Date	Subject	Status	Description	Email To	Email From	Related To	Contact	Account	Date Modified	User
Email Draft	2020-02-17 08:54	Last email	Draft	Confirm meeting		apopescu@w-system...	Test Account Activities		Test Account Activities	2020-02-17 08:54	Ana Popescu
Meeting	2020-02-26 09:00	Follow-up on proposal	Held				Test Account Activities		Test Account Activities	2020-02-17 08:41	Ana Popescu
Meeting	2020-02-13 09:00	Introduce all players	Held				Test Account Activities		Test Account Activities	2020-02-17 08:41	Ana Popescu
Meeting	2020-02-17 09:00	Discuss pricing	Held				Test Account Activities		Test Account Activities	2020-02-17 08:40	Ana Popescu
Call	2020-02-17 09:00	Bad time, will call back	Held				Test Account Activities		Test Account Activities	2020-02-17 08:39	Ana Popescu
Call	2020-02-17 09:00	Discuss review process	Held				Test Account Activities		Test Account Activities	2020-02-17 08:39	Ana Popescu
Call	2020-02-17 09:00	Call back	Cancelled				Test Account Activities		Test Account Activities	2020-02-17 08:39	Ana Popescu

The available columns on the **Historical Summary** panels are the following:

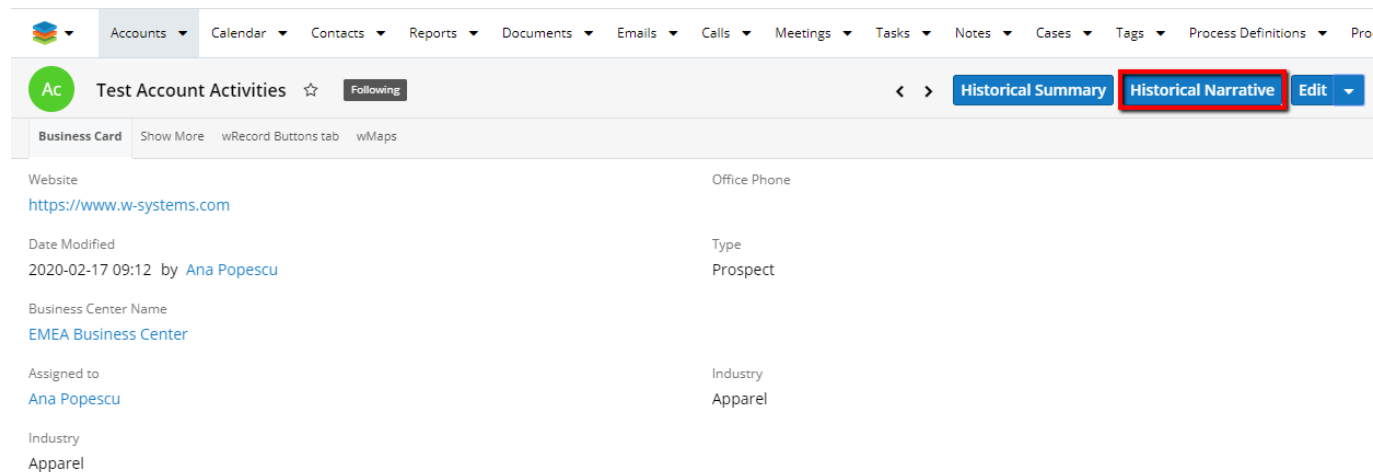
- Type
- Subject
- Start Date
- Status
- Description
- Email From
- Related Contact
- Date Modified
- User

The **Historical Summary** function is also available as a standard feature in Sugar. It can be found on the **Actions** dropdown menu on the **Accounts, Contacts, Opportunities, Leads, and Cases** modules in **Record View** mode.



Historical Narrative

The **Historical Narrative** button is available in **Record View** mode for the **Accounts** and **Contacts** modules.



When pressed, the button opens a drawer with all narratives for ended activities from the **History** subpanel.

Historical Narrative for "Test Account Activities" Account Close

Name	Assigned to	Status	Contact	Account	Related To	Attachments	Date Modified
Last email	Ana Popescu	draft		Test Account Activities	Test Account Activities	wActivities v5.17.zip ;	2020-02-17 08:54
To: apopescu@iv-systems.com							
Confirm meeting							
Follow-up on proposal	Ana Popescu	Held		Test Account Activities	Test Account Activities		2020-02-17 08:41
Introduce all players	Ana Popescu	Held		Test Account Activities	Test Account Activities		2020-02-17 08:41
Discuss pricing	Ana Popescu	Held		Test Account Activities	Test Account Activities		2020-02-17 08:40
Bad time, will call back	Ana Popescu	Held		Test Account Activities	Test Account Activities		2020-02-17 08:39
Date Starts: 2020-02-17 09:00							
Date End: 2020-02-17 09:30							
Discuss review process	Ana Popescu	Held		Test Account Activities	Test Account Activities		2020-02-17 08:39
Date Starts: 2020-02-17 09:00							
Date End: 2020-02-17 09:30							
Call back	Ana Popescu	Not Held		Test Account Activities	Test Account Activities		2020-02-17 08:39
Date Starts: 2020-02-17 09:00							
Date End: 2020-02-17 09:30							

Last Modified: 2023-05-12 20:52:24