wActivities User Guide

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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

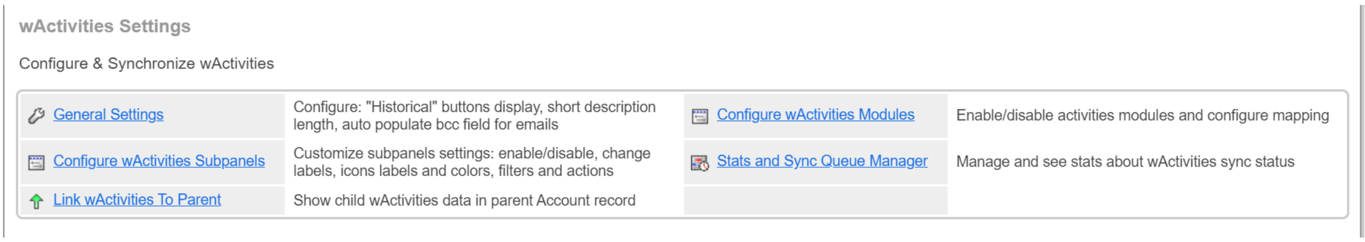
- **Less Clicking**: wActivities collects your Sugar activities in two subpanels, significantly reducing the time it takes to check your planned and past activities.
- **Quickly Find Activities**: The wActivities subpanels allow you to search or filter through your team's schedules and activities
- **Enhanced 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:

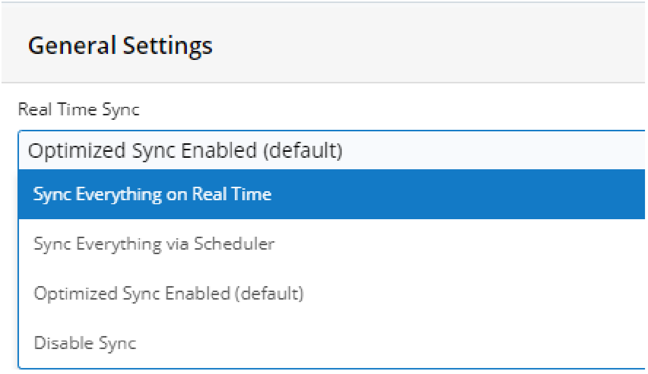


- [wActivities General Settings]
- [Configuring the wActivities Subpanel]
- [Configuring the wActivities Module]
- [Stats and Sync Queue Manager]
- [Link wActivities to Parent]

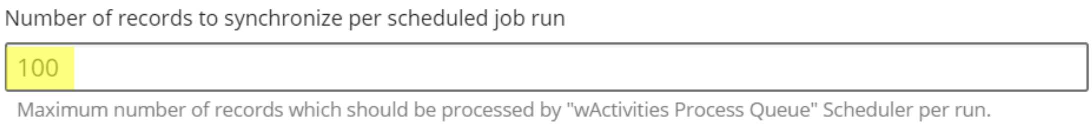
wActivities General Settings

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

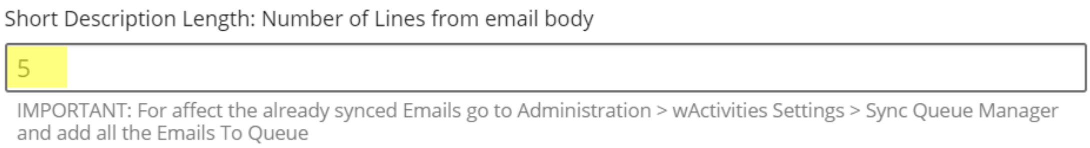
- **Real Time Sync** - users can choose from this dropdown field between four actions: **Sync Everything on Real Time**, **Sync Everything via Scheduler**, **Optimized Synch Enabled (default),** and **Disable Sync**.



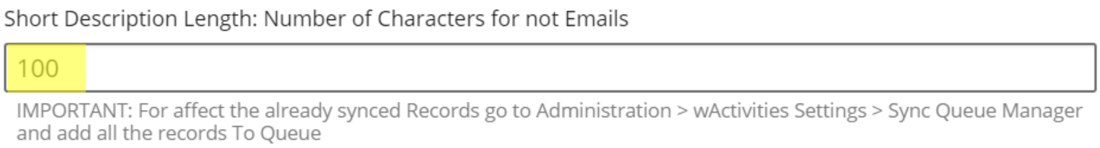
- **Number of records to synchronize per scheduled job run** - this field supports a value between 10 and 500 records, but it should be set to 100, ideally.



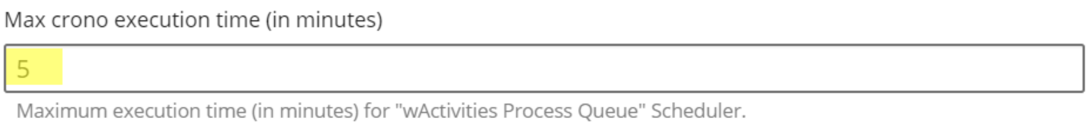
- **Short Description Length** - this field allows users to set the number of lines from the email body and supports a minimum value equal to 1.



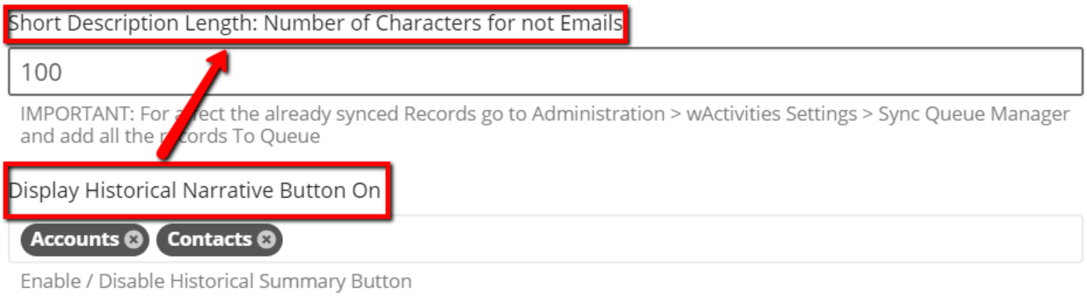
- **Short Description Length** - this field allows users to set the number of characters for not emails and supports a minimum value equal to 1.



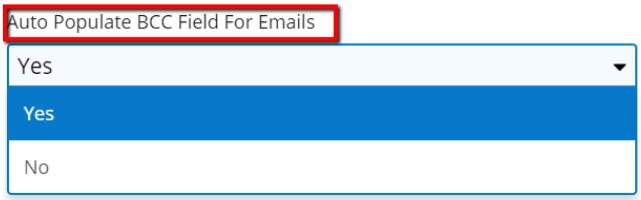
- **Max crono execution time** - this is a field where users can set the number of minutes for the execution for the **wActivities Process Queue**. The field supports a minimum value equal to 1.



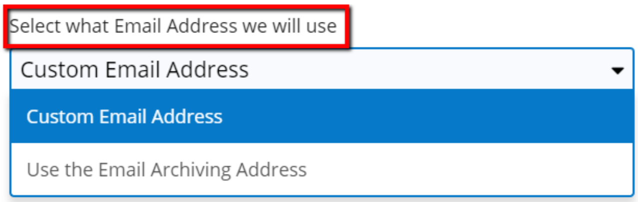
- **Display Historical Summary Button** - this field allows users to enable/disable the historical summary button for the email. Users need to select the modules for which the action applies.



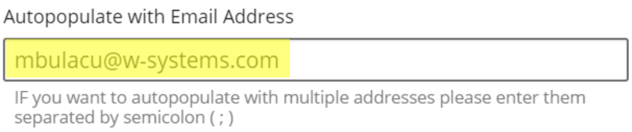
- **Auto-Populate BCC Field For Emails** - this is a **Yes/No** field that allows users to set if they want or not wActivities to auto-populate the BCC field for emails.



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

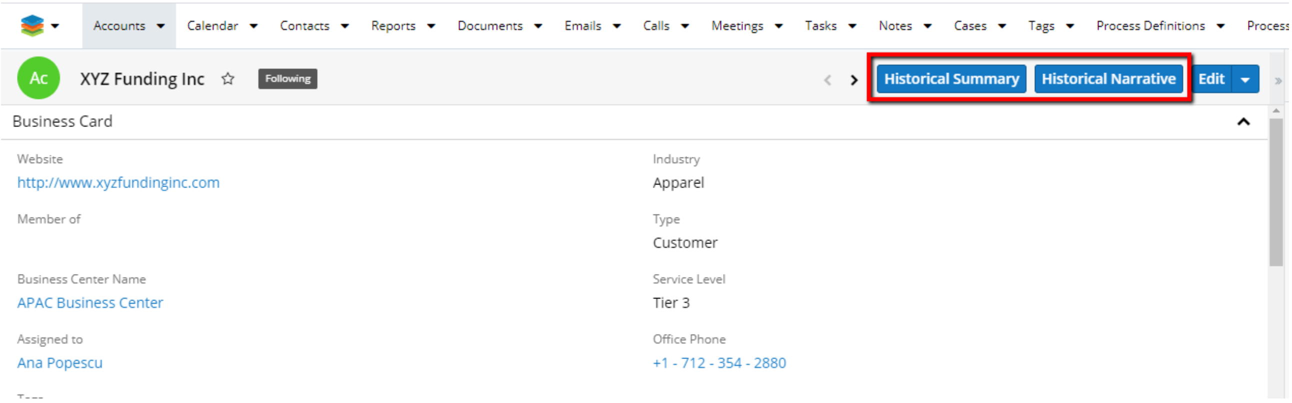


- **Autopopulate with Email Address** - this field allows the **Admin user** to set a default email address for wActivities emails. To auto-populate the fields with more than one email address, these need to be separated by a semicolon.

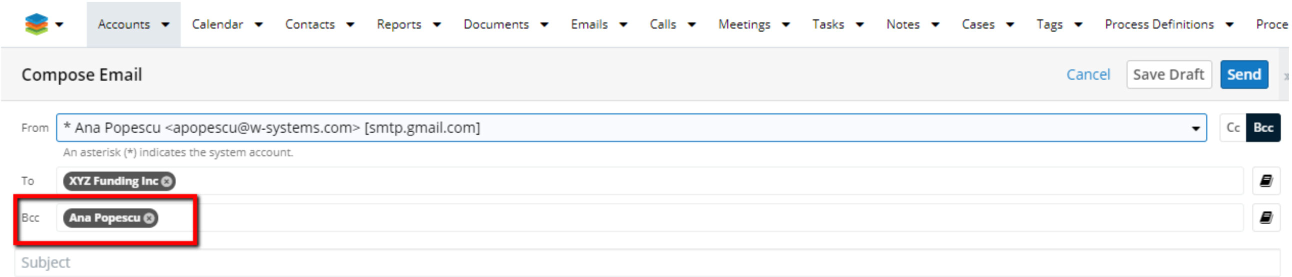


Once all the settings above are set, the "**Success General Settings has been successfully modified!**" message appears.

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.

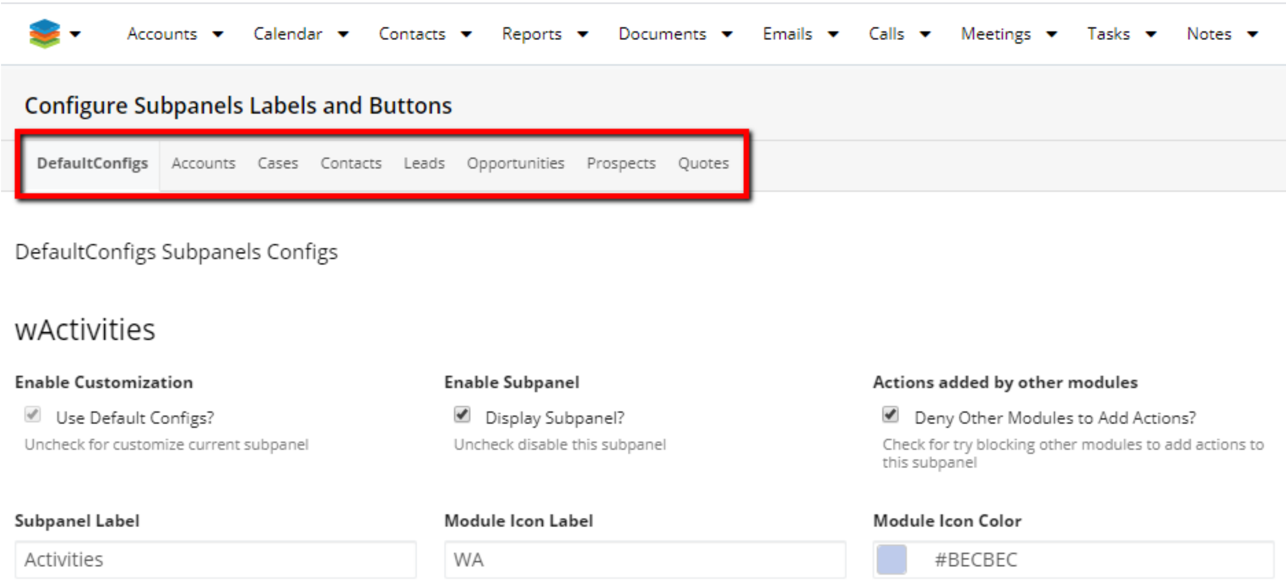


Configuring the wActivities Subpanel

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

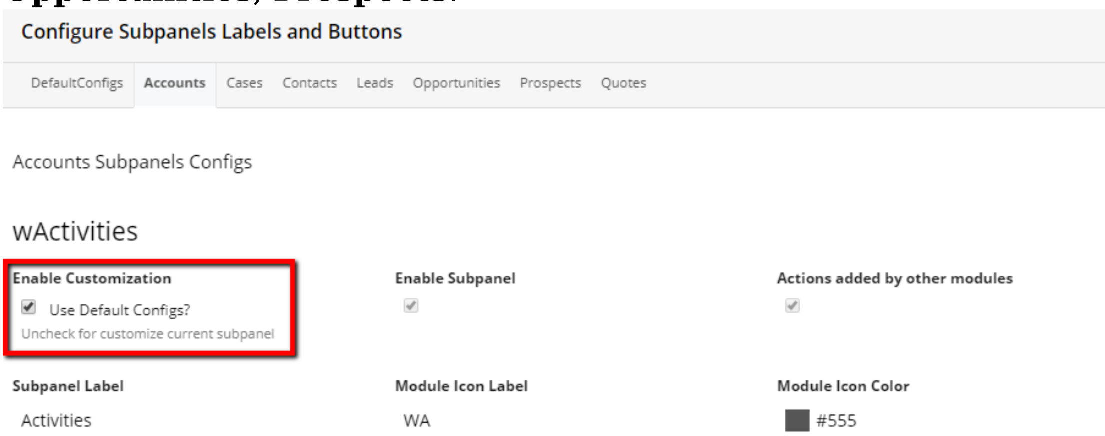
- Enable Customization
- Enable Subpanel
- Actions added by other modules
- Subpanel Label
- Module Icon Label
- Module Icon Color
- Enabled Search Filters / Buttons
- Buttons Display Type
- Enable Create Actions
- Sticky Action
- Actions Order
- Actions Labels

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



Enable Customization

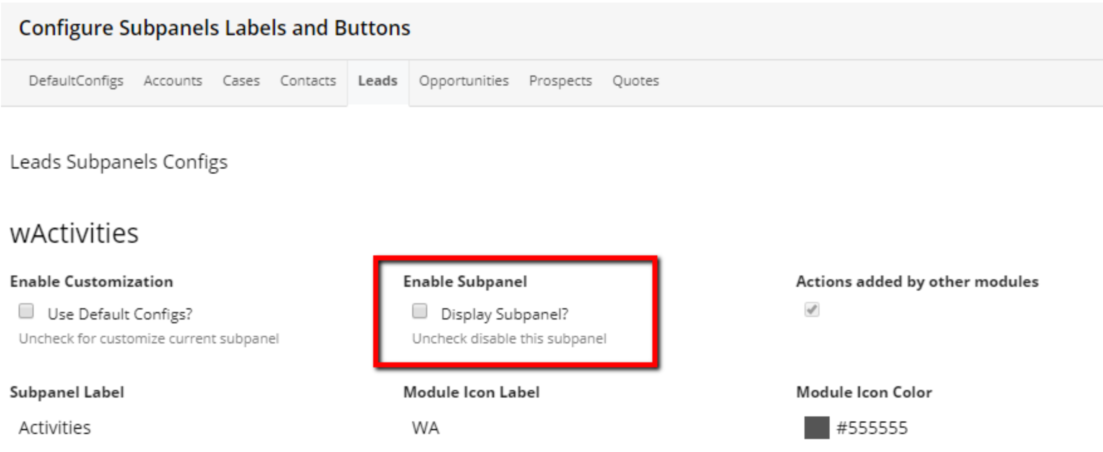
This option allows the user to select the default configurations for the wActivities package, for any of the following modules: **Accounts**, **Cases**, **Contacts**, **Leads**, **Opportunities**, **Prospects**.



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

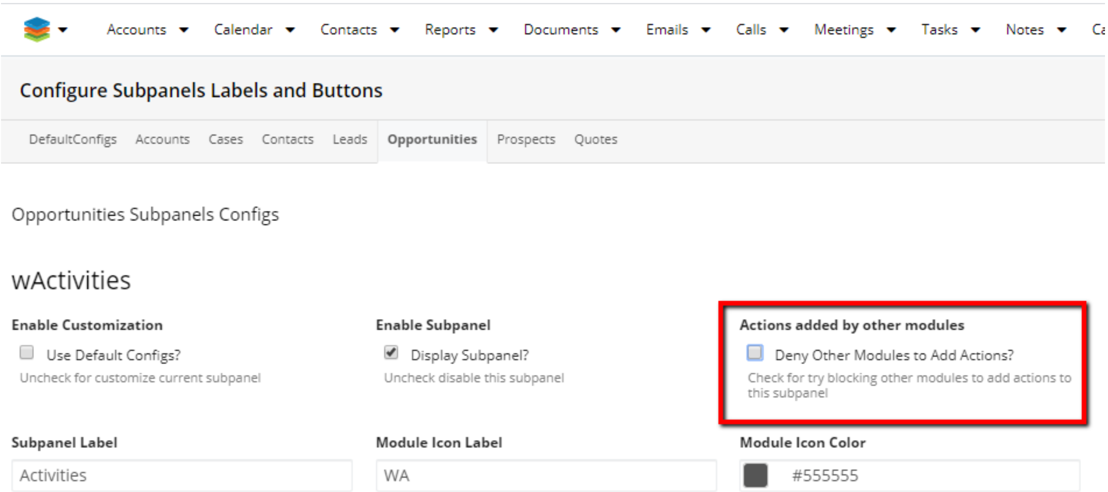
Enable Subpanel

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

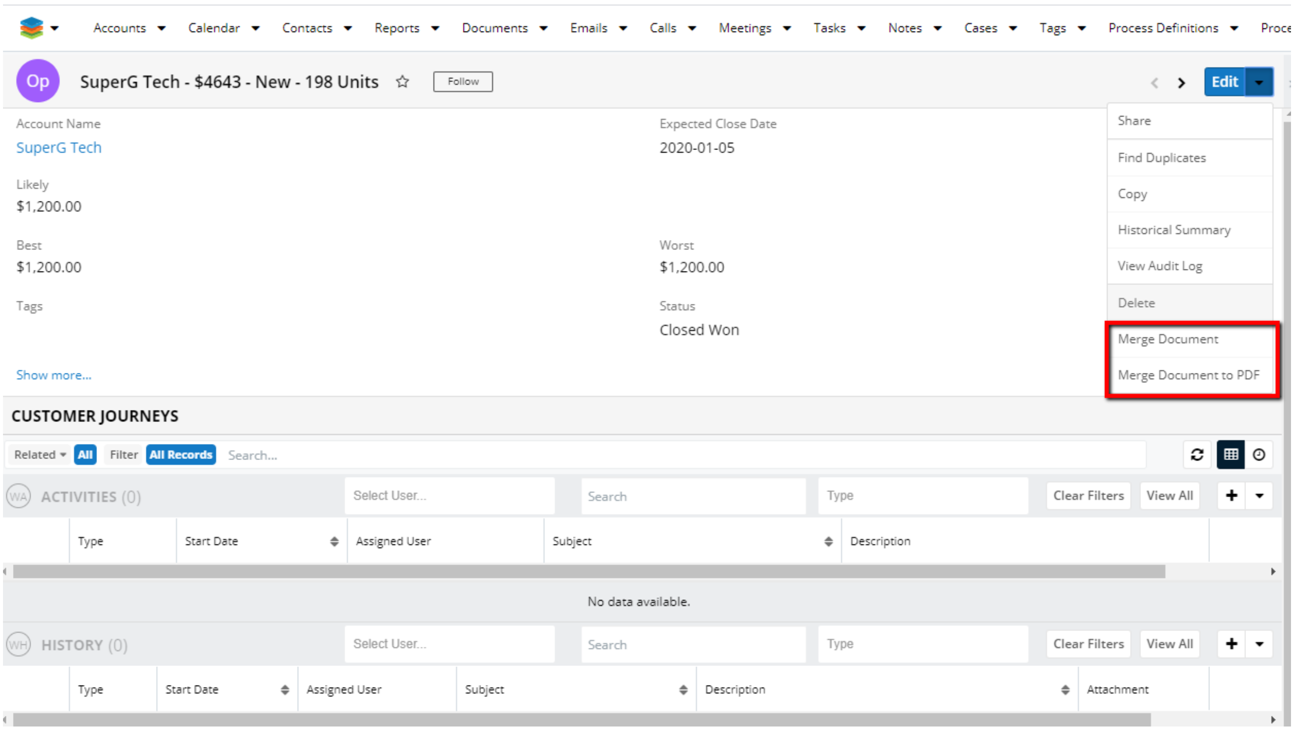


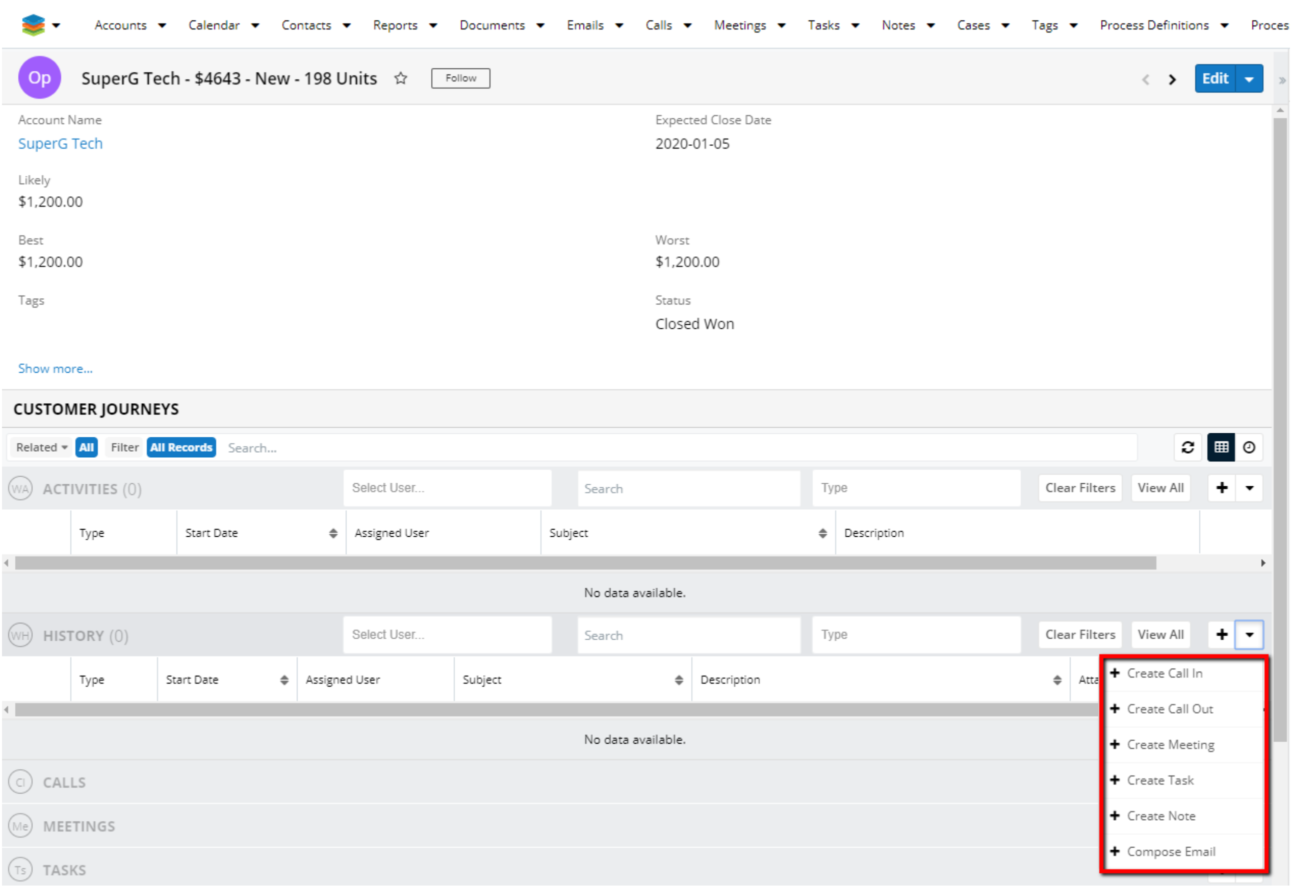
Actions Added by Other Modules

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.



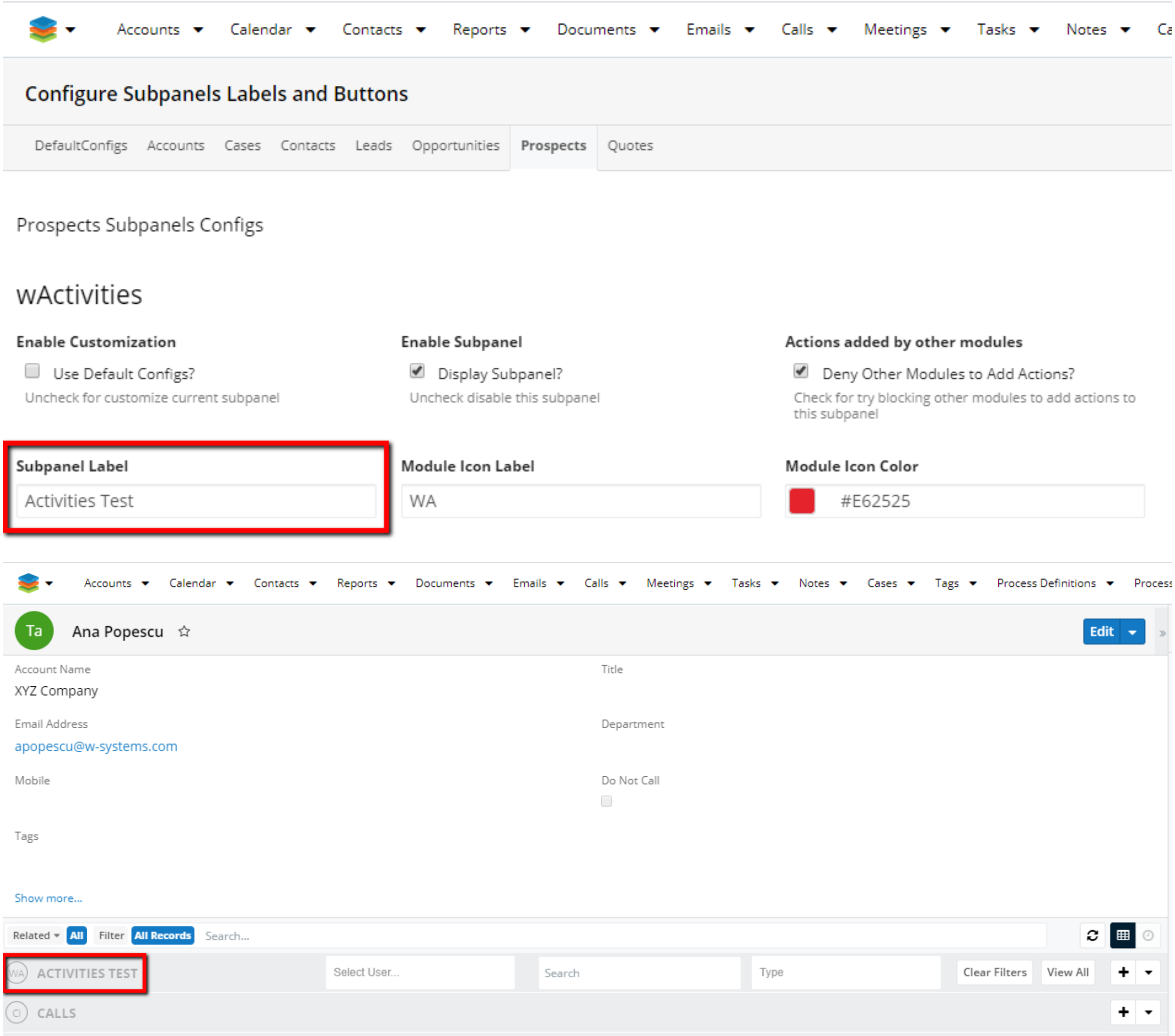
For example, users can choose if they want to see the actions for other packages in the activities menu or not.





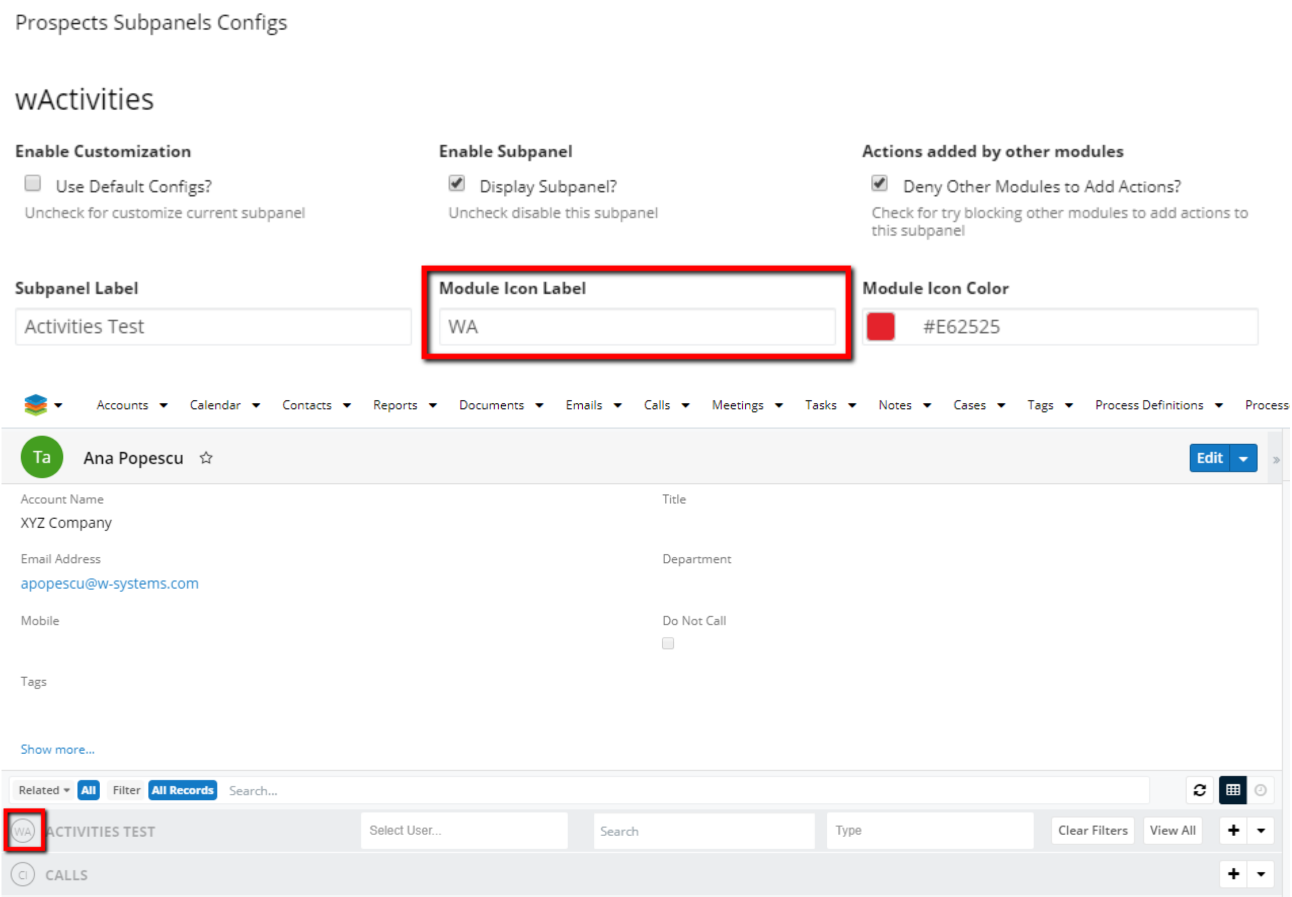
Subpanel Label

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



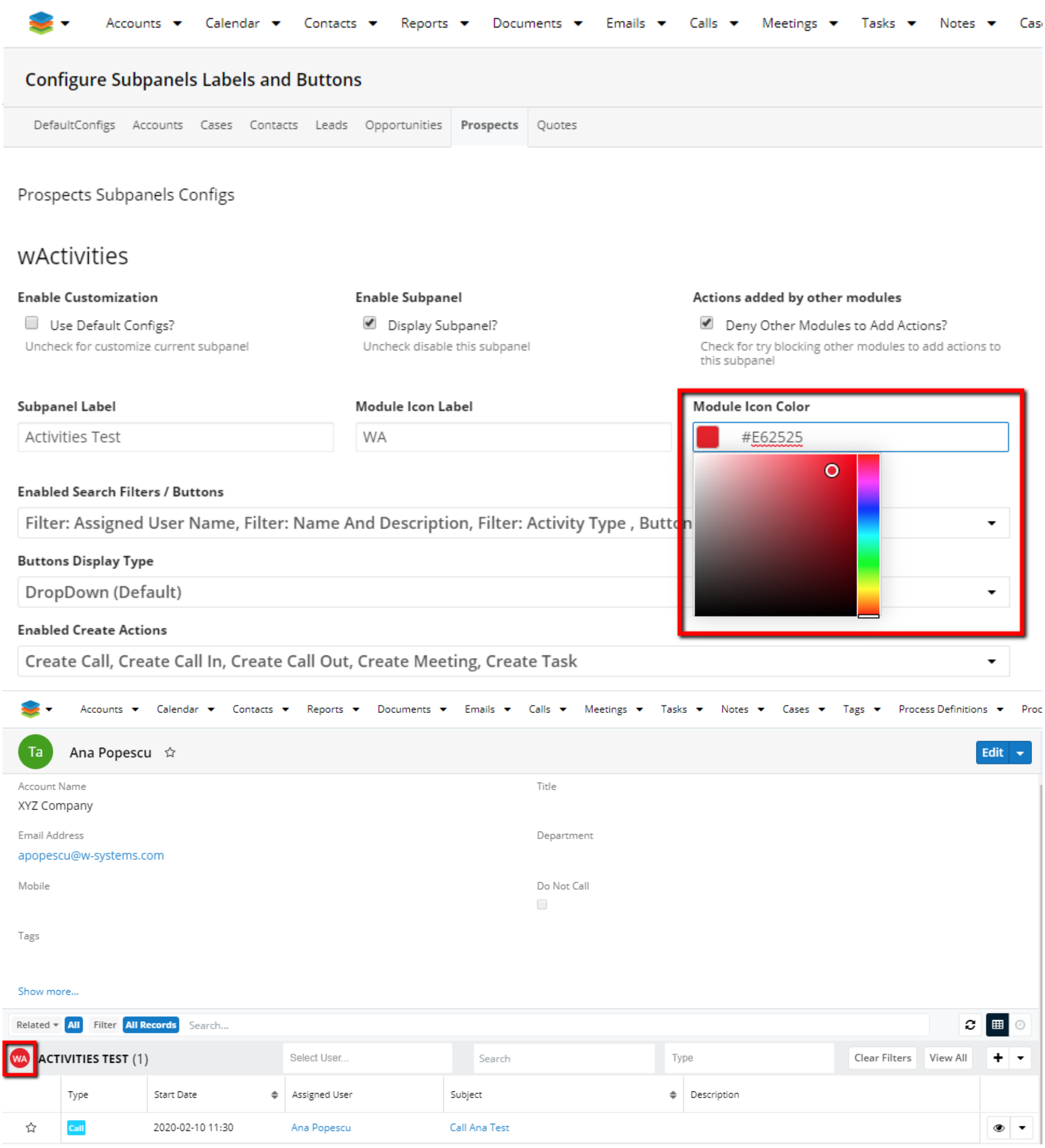
Module Icon Label

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



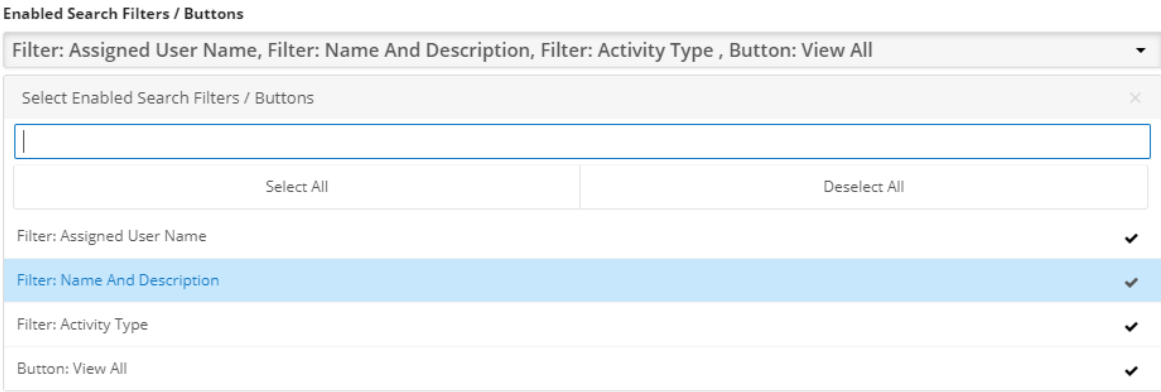
Module Icon Color

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



Enable Search Filters or Buttons

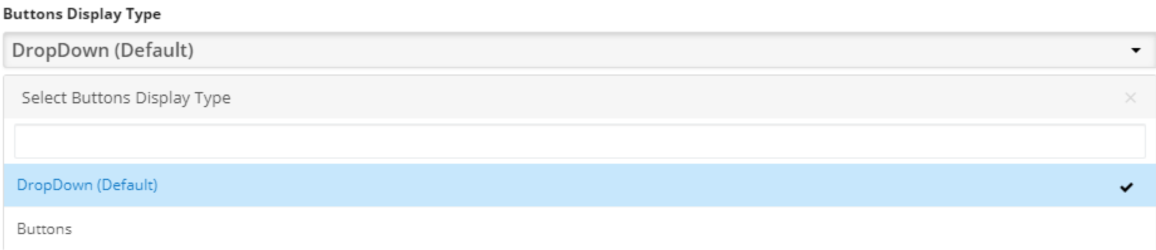
Admin users can choose between three types of filters in this section: **Assigned User Name**, **Name and Description**, and **Activity Type**. Use the individual selection to **Select** or **Deselect** the available options.



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

Button Display Type

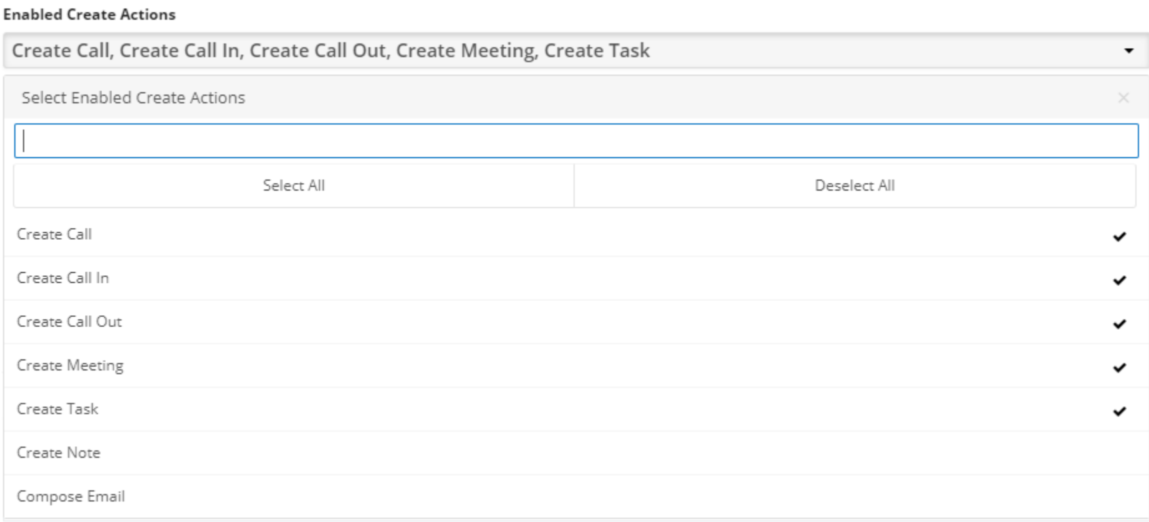
This customization option allows users to choose between two types of button types: **Buttons** and **DropDown**. By default, the **Button Display Type** is set to **DropDown**.

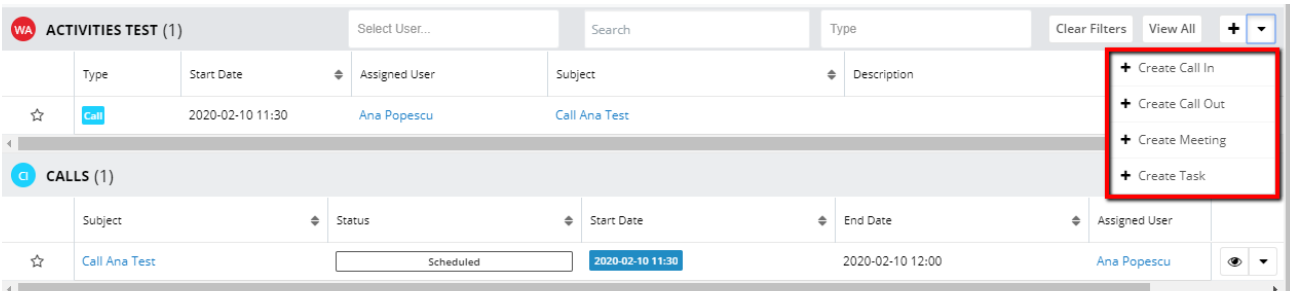


Note: The **DropDown** button type is the most frequently used, due to its flexibility.

Enable Create Actions

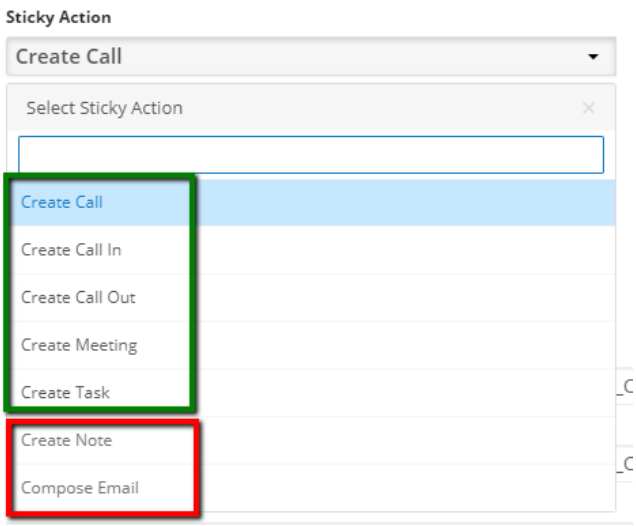
Here, users can select their actions of choice for the wActivities module. They can individually **Select** or **Deselect** any of the options provided.





Sticky Action

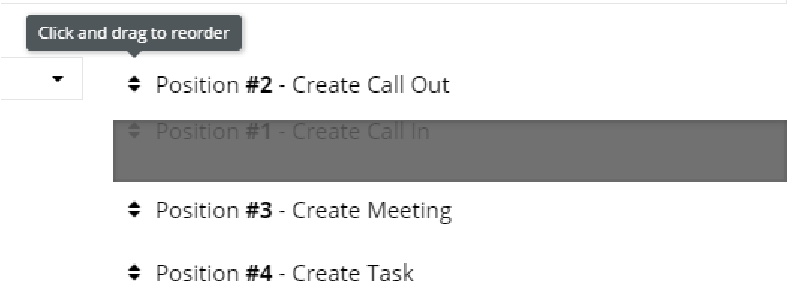
The **Sticky Action** functionality allows users to pre-define fast actions when the **Add** button is pressed.



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

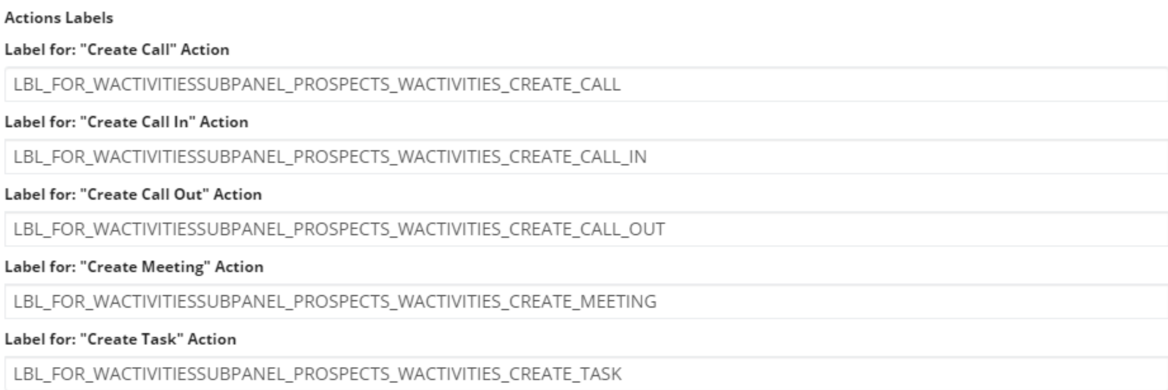
Actions Order

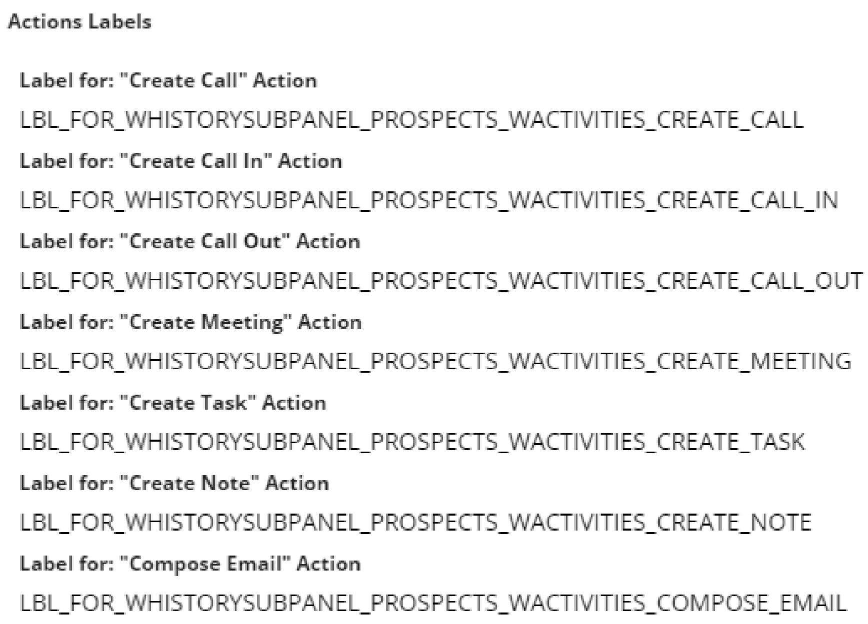
This field allows users to arrange the Actions they set by dragging and dropping them to the desired position.



Action Labels

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

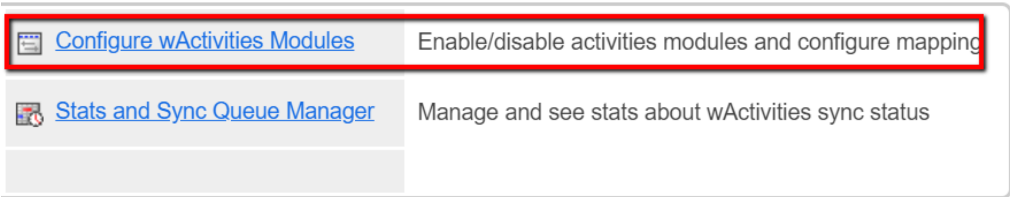




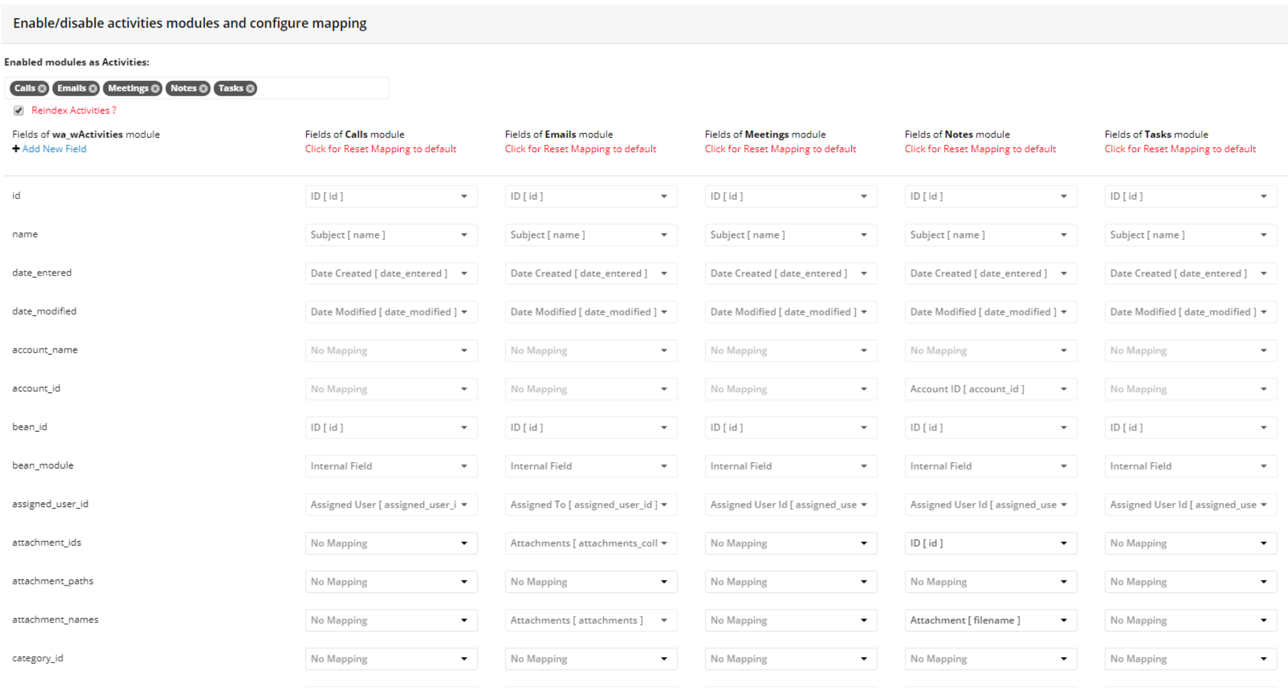
To keep the changes made on the **Configuration** page, press the **Save** button.

Configuring the Activities Module

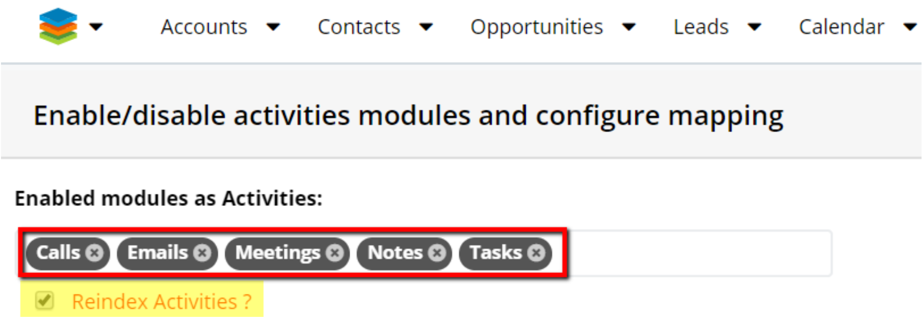
The wActivities Module allows **Admin users** to configure and enable or disable activities, configure fields and add new custom fields. To manage this, go to the **wActivities** section of the **Administration** page and click the **Configure wActivities Modules** link.



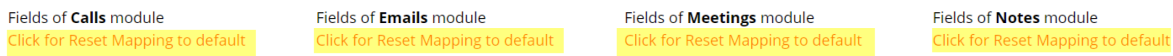
The **Calls**, **Tasks**, **Emails**, **Notes**, and **Meetings** modules already have a default activities field mapping when the package is installed on a Sugar instance.



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



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

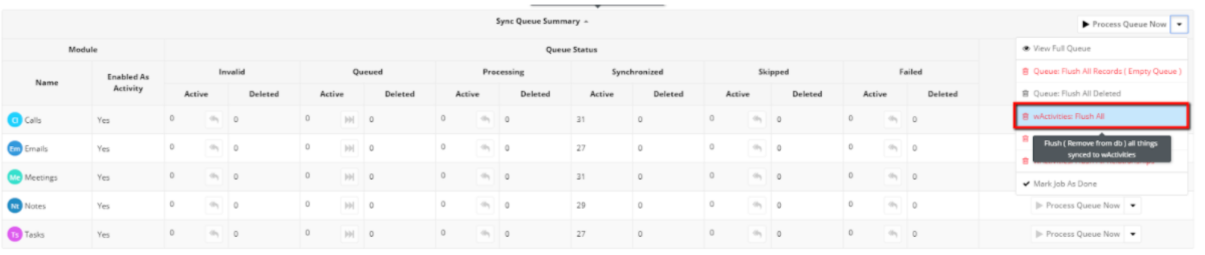


Adding Custom Fields

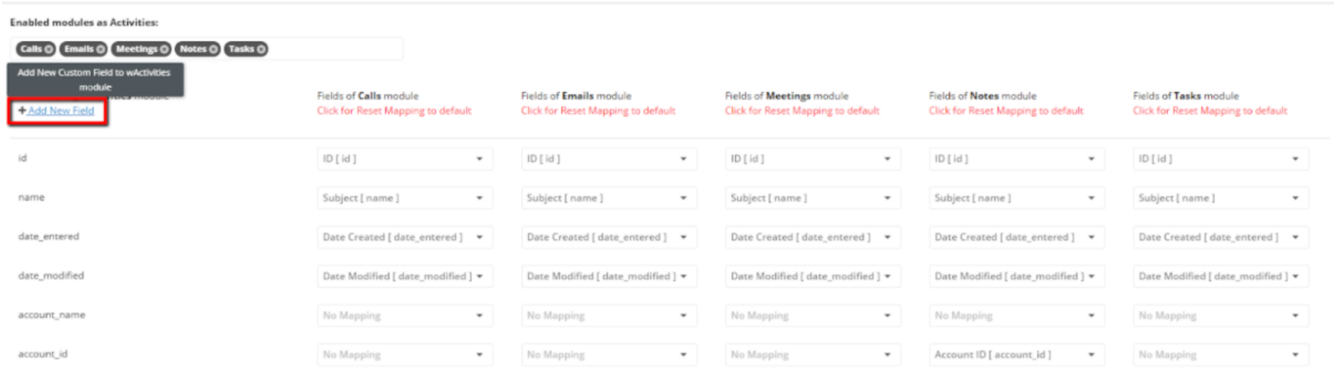
The wActivities package allows users to add custom fields to different modules.

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:

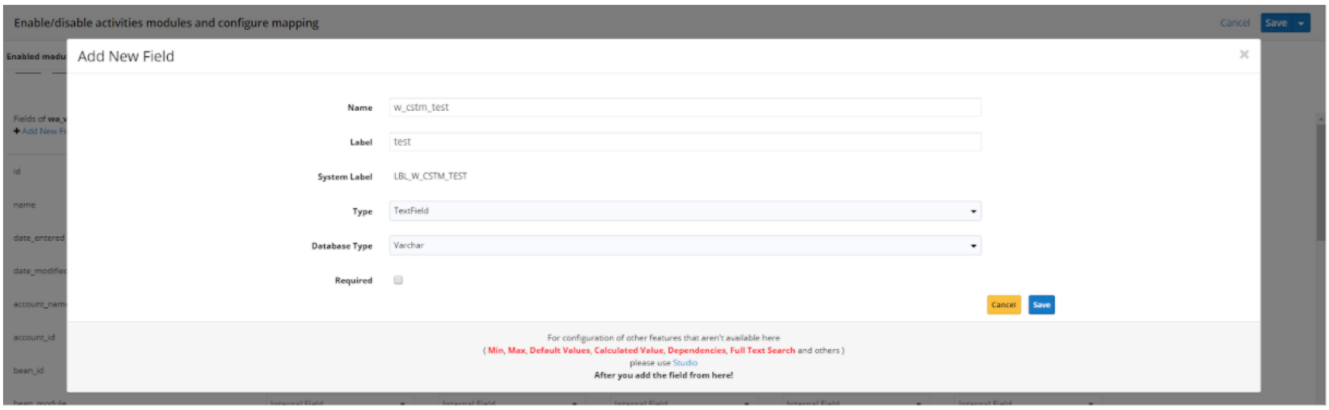
1. Starts and **Sync Manager > wActivities: Flush All**
2. **Configure wActivities Module > Create Custom Fields**
3. **Stats and Sync Manager > Perform Queue Now**.



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

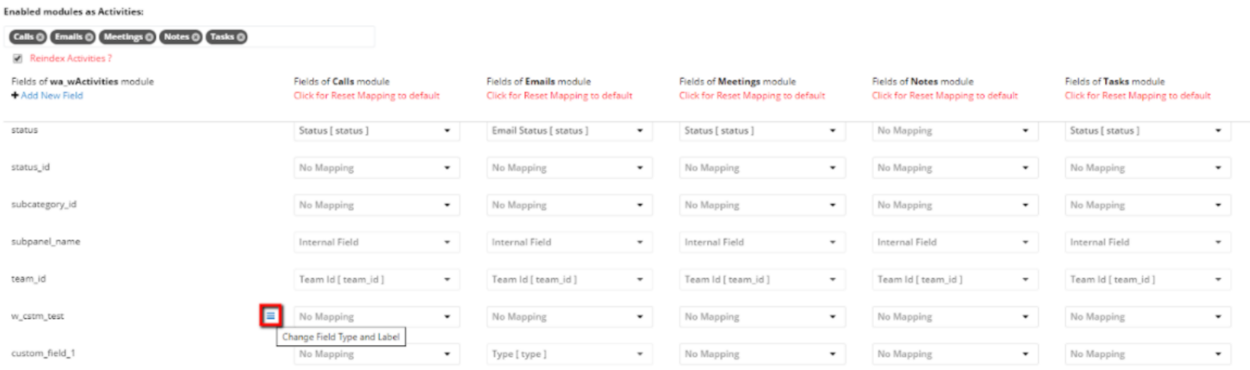


This will open a new drawer where users can create a new field type.



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.



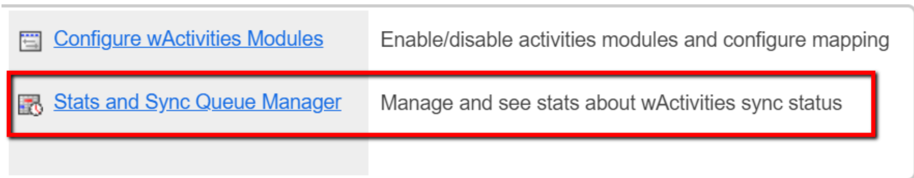
Fields that are already mapped will have the "Update" button disabled.

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

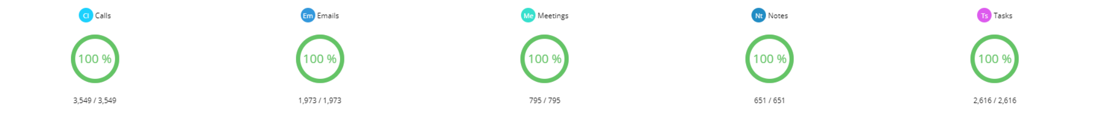
The **Stats and Sync Queue Manager** section of the **Administration** page allows admin users to manage and see statistics about the sync queue.

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



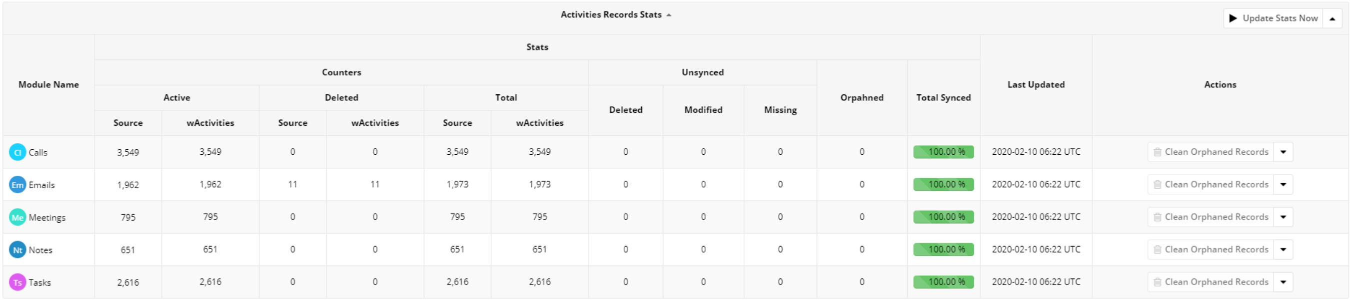
2. Go to the Sats and **Sync Queue Manager** link on this section.

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			Orpahned	Total Synced		
	Active		Deleted		Total		Deleted	Modified	Missing				
	Source	wActivities	Source	wActivities	Source	wActivities							
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

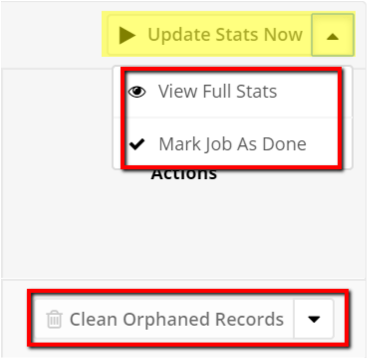
Module records are split into two categories:

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.

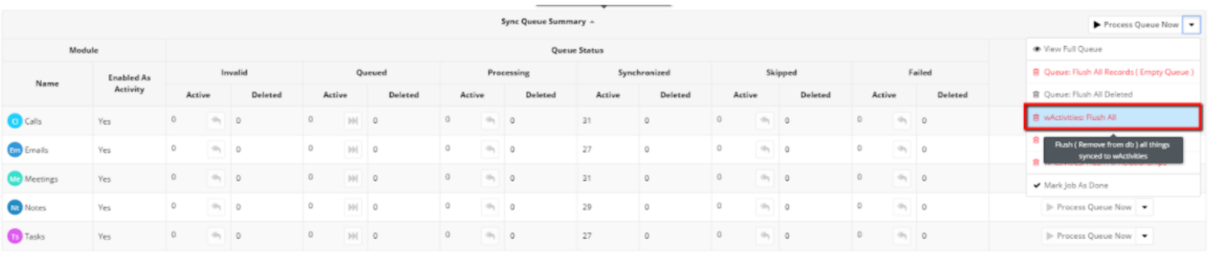


1. **Update Stats Now** - this action lets users manually run the scheduler job and manually update all modules.
2. **View Full Stats** - this action displayed the then View And Manage Counters queue;
3. **Mark Job as Done**
4. **Clean Orphaned Records** - this option allows users to clean records that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

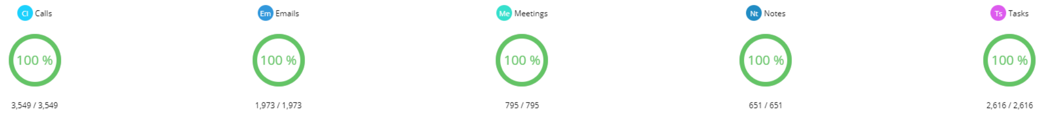
Sync Queue Summary

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**



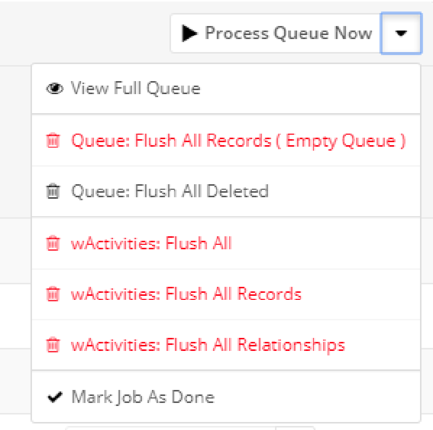
A second method to synchronize all records from a module is to click on the percentages icon and wait for records to synchronize.



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

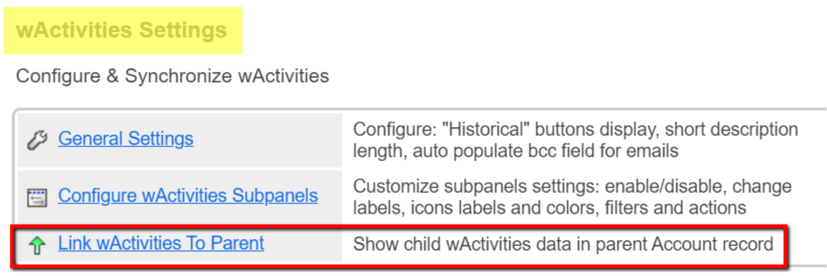
For each module, there are available some other options:

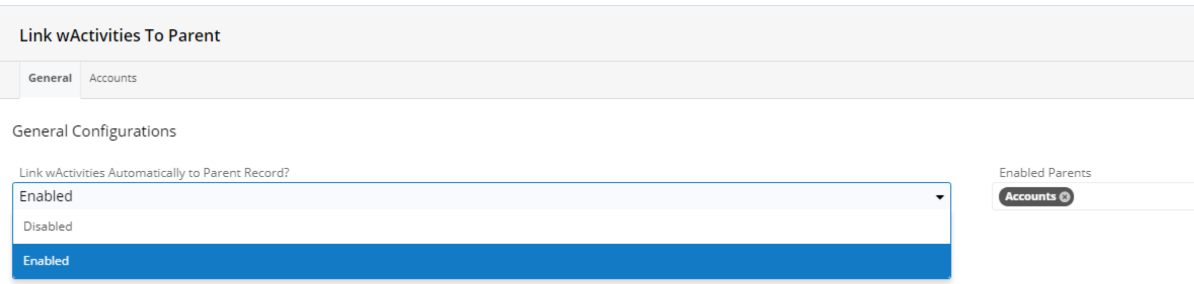


Link wActivities to Parent

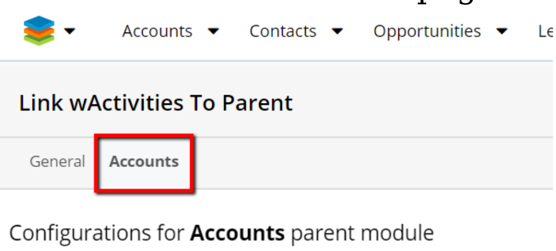
This configuration option allows users to link **Child activities** in different modules (**Calls**, **Meetings**, **Tasks**, **Notes**, or **Emails**) to a **Parent Account**.

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

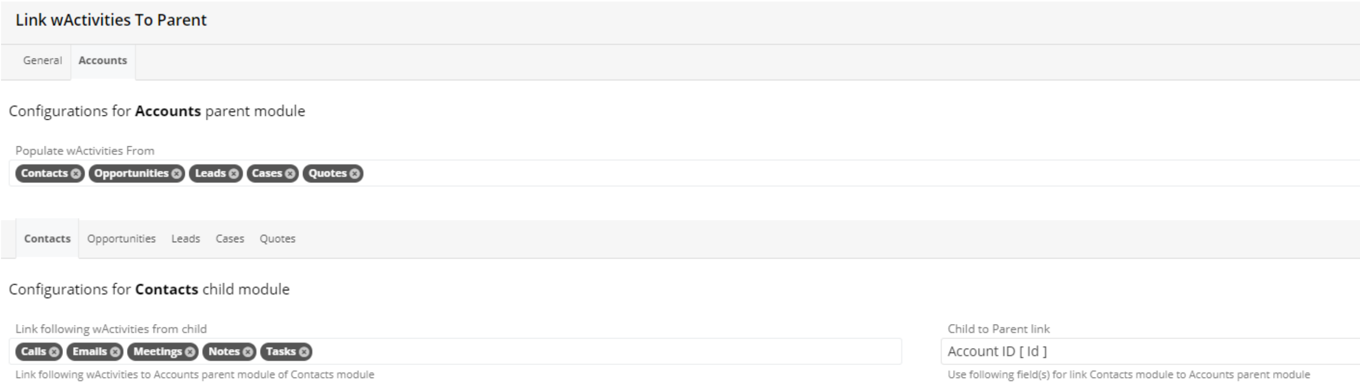




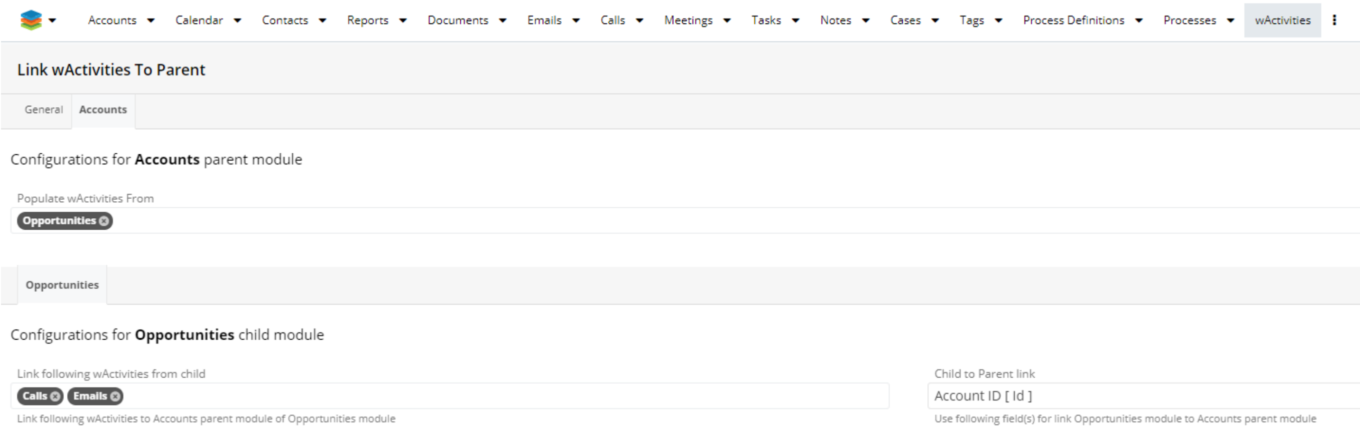
Choose the Child module by using the "**Populate wActivities From**" in the **Accounts** section of the page.



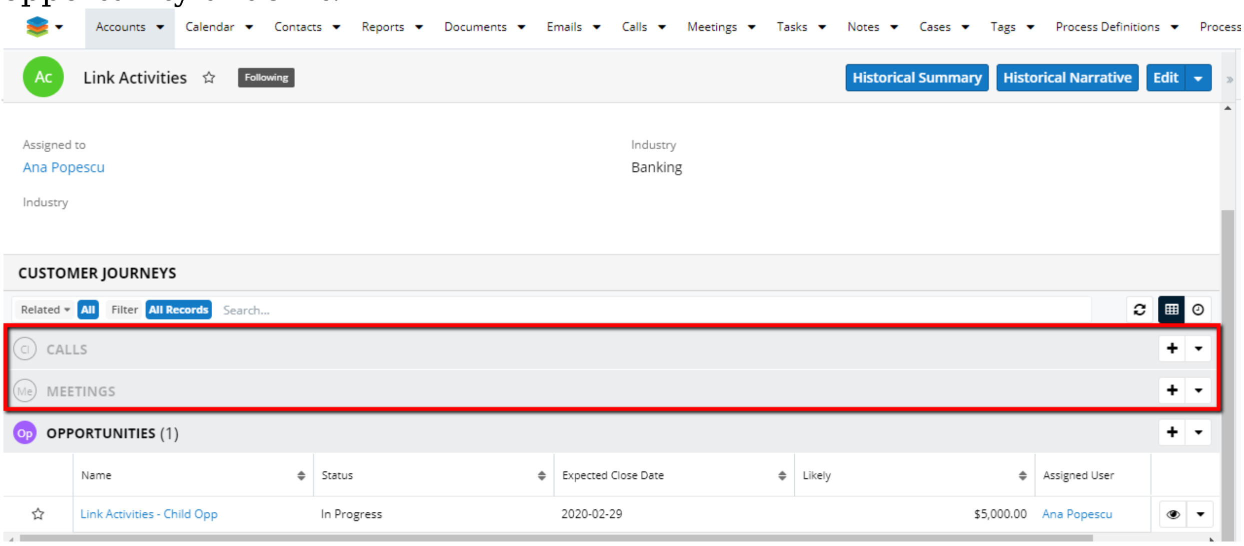
After selecting the module, users can choose which activity types need to be inherited for each **Child module**.



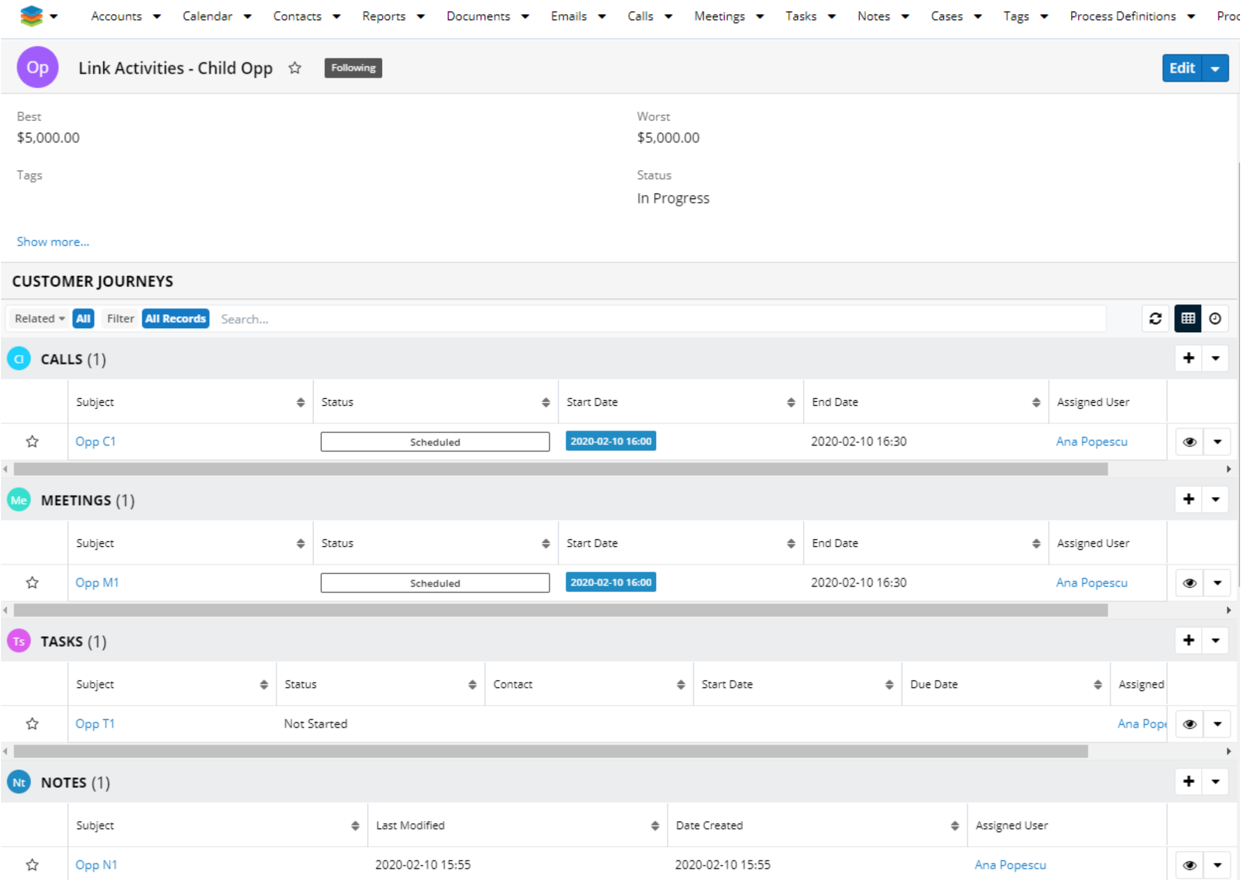
In the following example, we will link only the **Calls** and **Meetings** activities from the **Opportunities** module to the Parent Account.



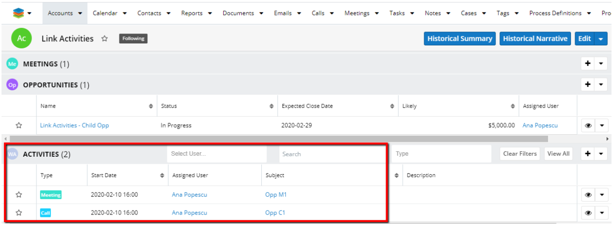
1. Create a new Account without configuring any activities and create a new opportunity under it.



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

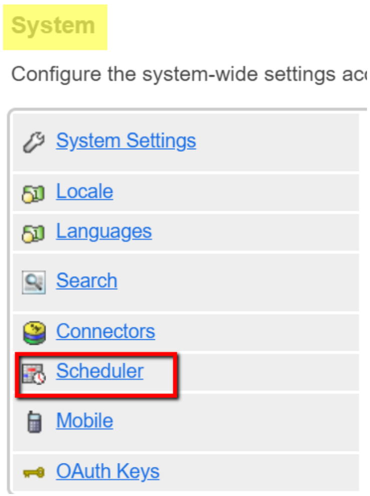


3. Go to the **Parent Account** and see that only the **Calls** and **Meetings** records from the **Opportunities** module are linked to the Account **wActivities** and **wHistory** subpanels.



Scheduler Job

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



- **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**

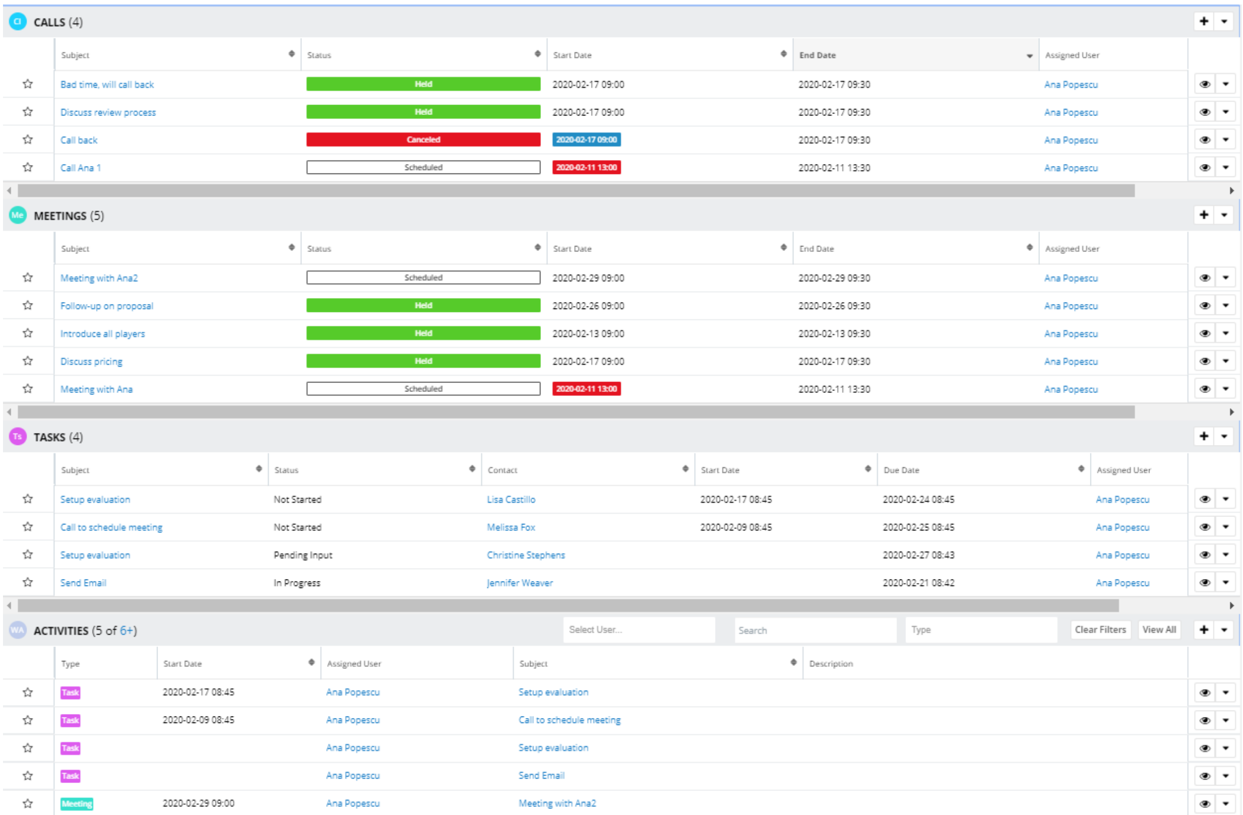
When a new activity is created, a clone of that record is saved in the **wActivities module** and will be displayed in the corresponding **wActivities subpanel**, based on its scheduling status.

Activities Subpanel

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

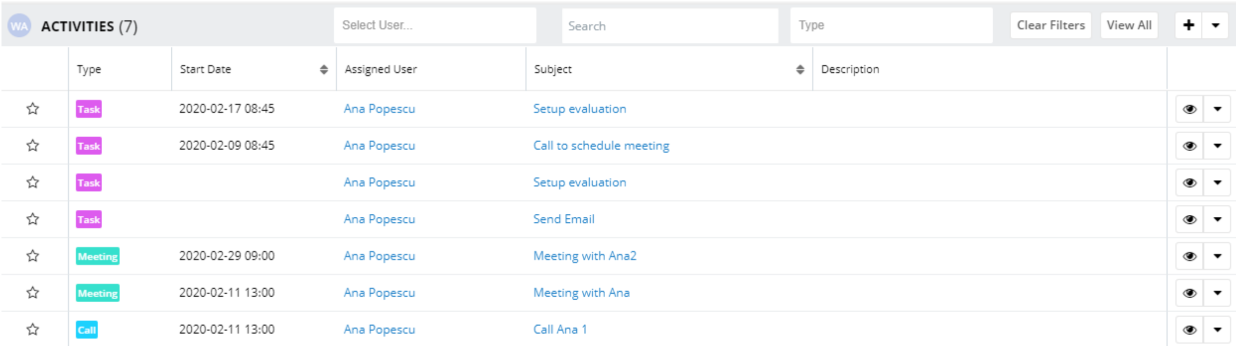
The Activities subpanel will display the following activity types:

- **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**.



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.



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:

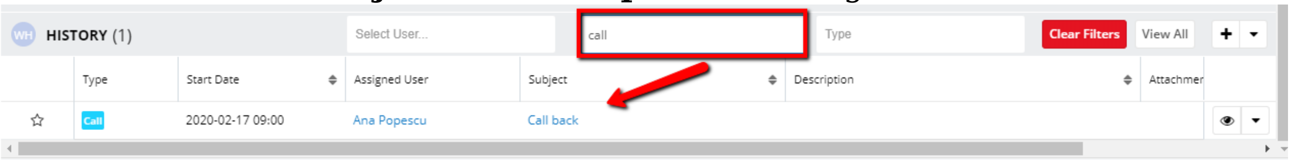
- **Type**: This column contains a label for the activity type (Email In / Email Out / Email **Draft / Email Archived**.
- **Start Date**: This column contains the start date of the activity, mapped during the Configuration step.
- **Subject**: This column contains a hyperlink to the original record.
- **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

wActivities 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:

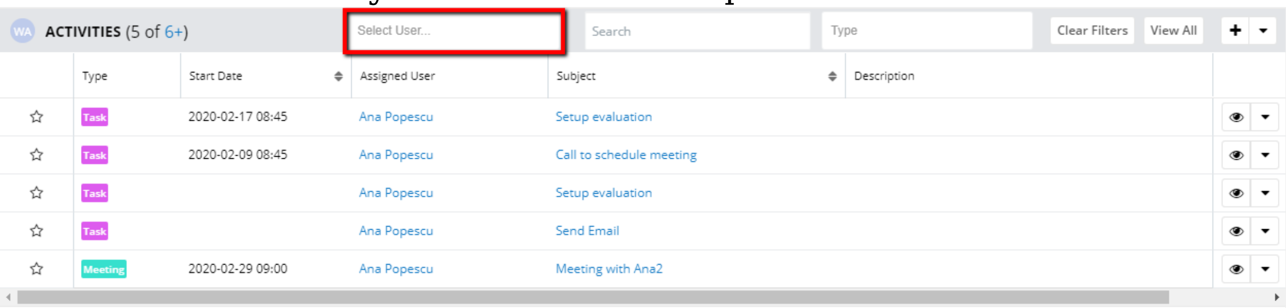
Search by Subject

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.

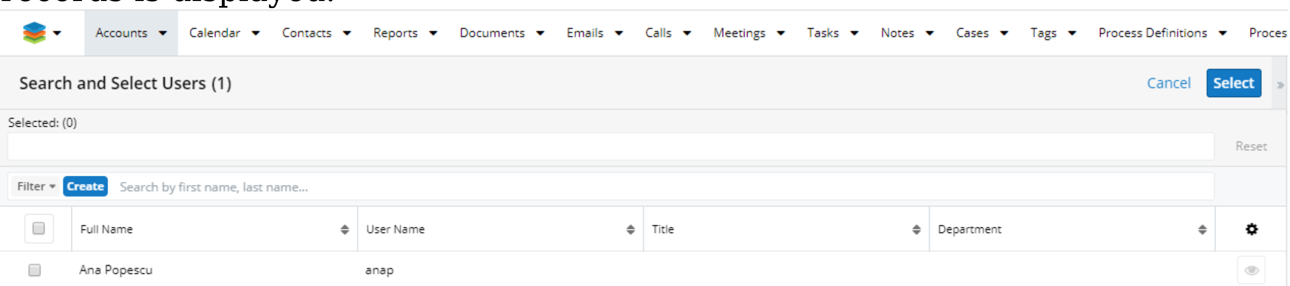


Select User

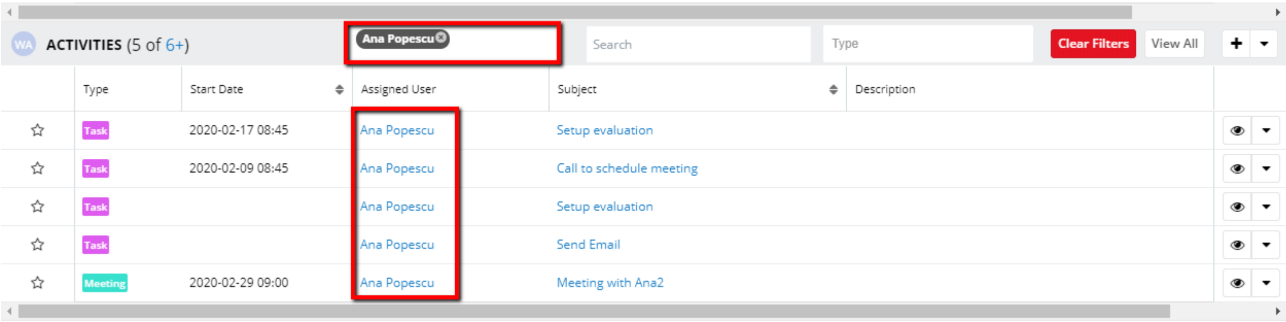
Users can use the Search and Select function to filter records by the **Assigned User** from the **History** and **Activities** subpanels.



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

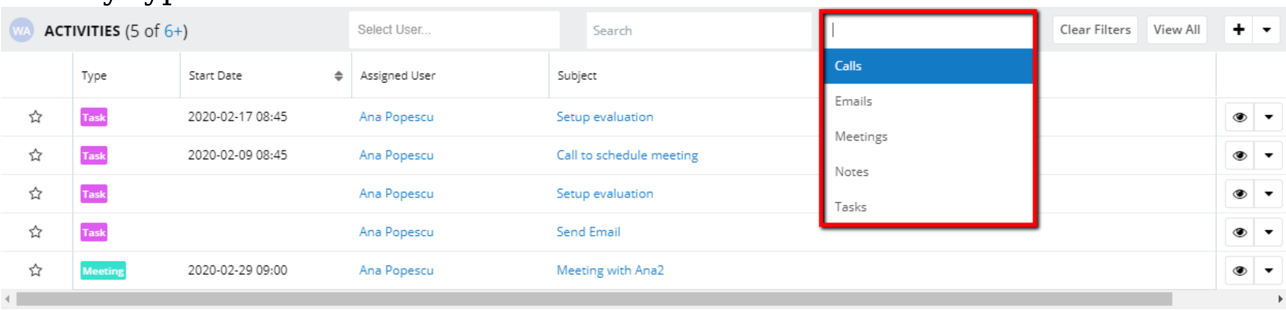


When a user is selected from the drawer, the subpanel will filter the activities and records based assigned to the selected user.

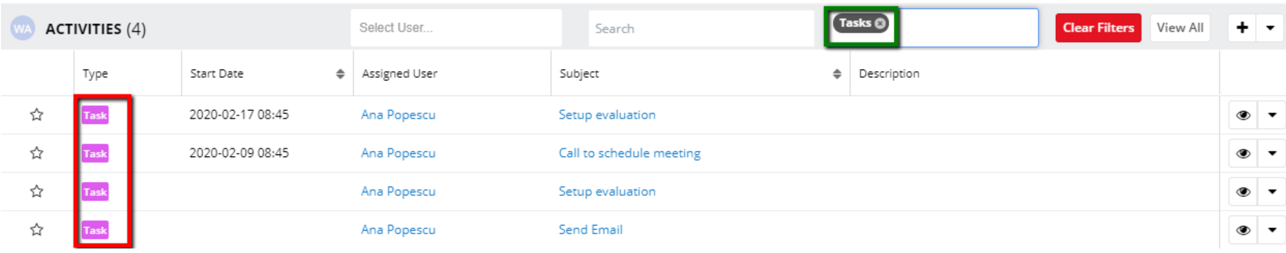


Select Type

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

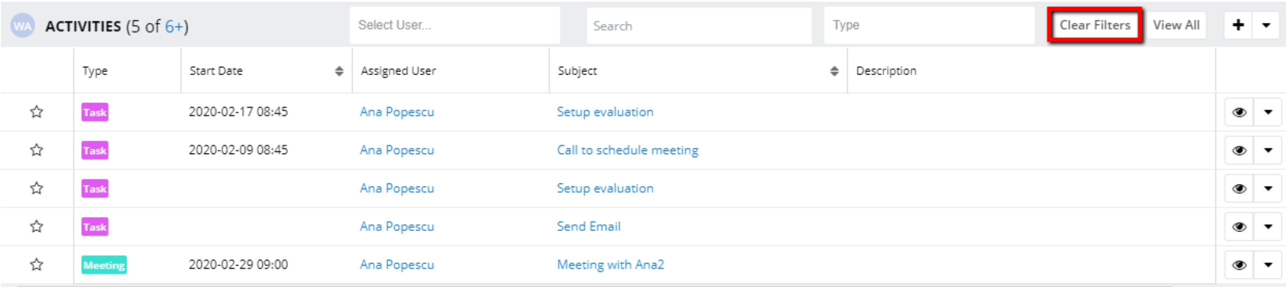


Choosing an activity type or more will display in the subpanel only the activities with the selected label(s).



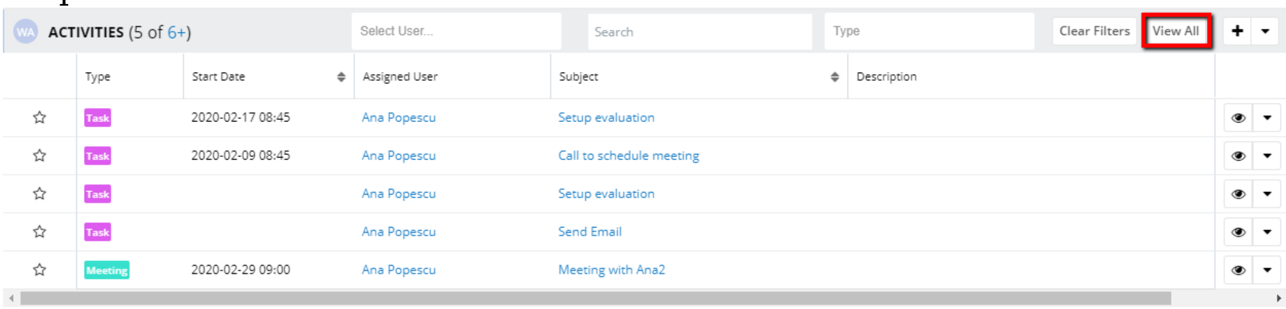
Clear

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.



View All

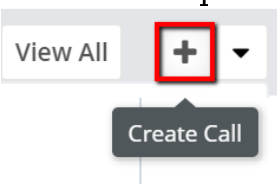
The **View All** button allows users to see all activity types in the Activities subpanel.



(+) 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.

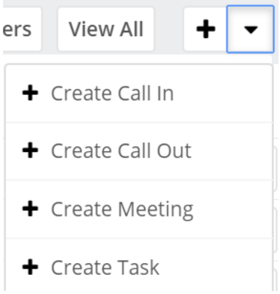
1. When pressed from the **Activities** subpanel, the drawer for the **Create Call** action will open with a default status of **Scheduled**.
2. When pressed from the **History** subpanel, the drawer for the **Create Call** action will open with a default status of **Held**.



Actions Dropdown Menu

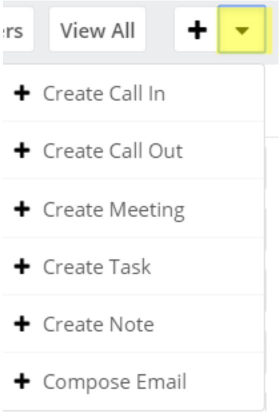
The **Actions Dropdown Menu** can be found in the subpanel's header. It gives users the possibility to create new records for the default enabled modules. Each wActivity subpanels have different default buttons that can be configured from the **Administration** page.

- 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 Drawe**r 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:

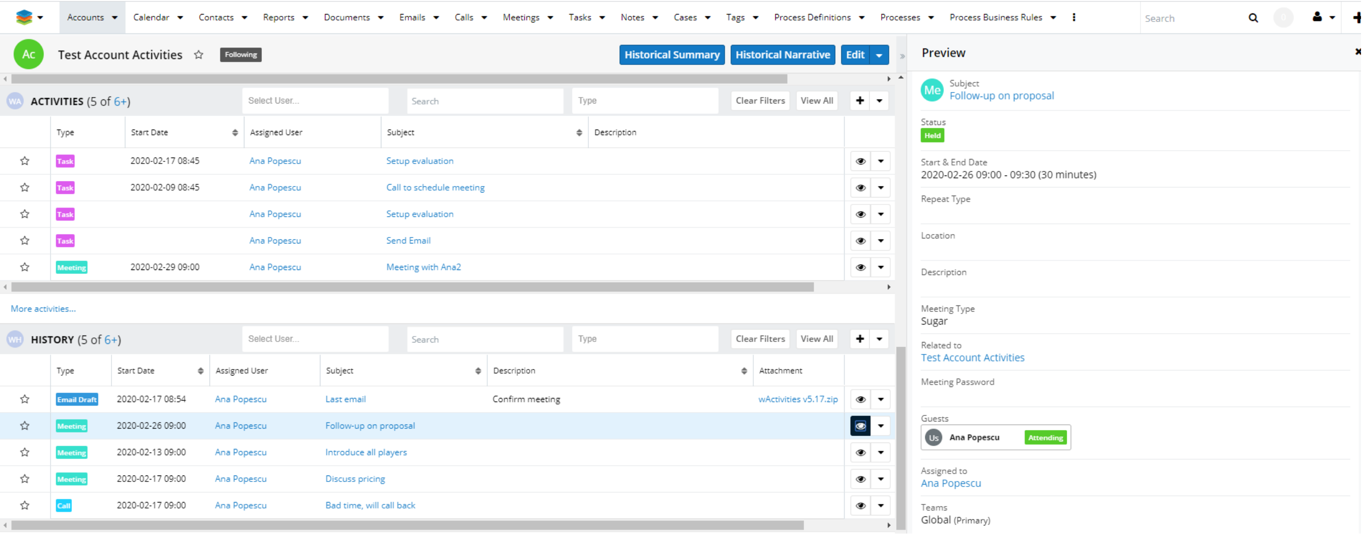


1. **Create Call In**: When the button is pressed, the **Create Call** drawer will open with default values **Status: Scheduled** and **Direction: Inbound**.
2. **Create Call Out**: When pressed, the **Create Call** drawer will open with default values **Status: Held** and **Direction: Outbound**.
3. **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**.

6. **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

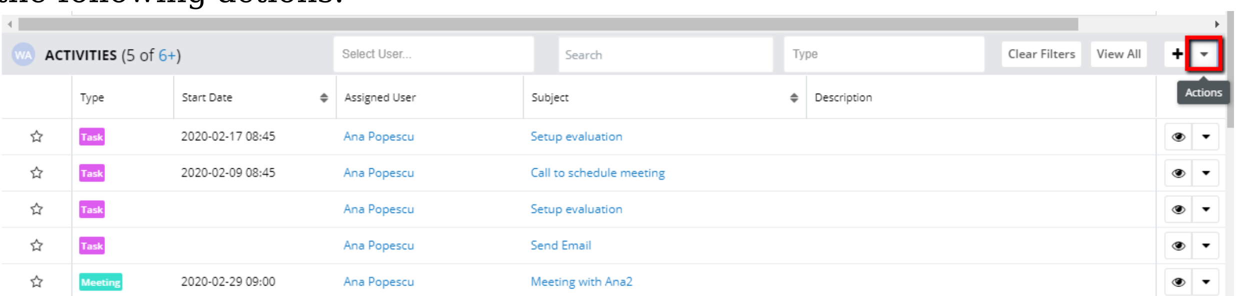
The **Preview** button allows users to see a preview of the original record on the Intelligence Pane when it is pressed.



Inline Actions

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

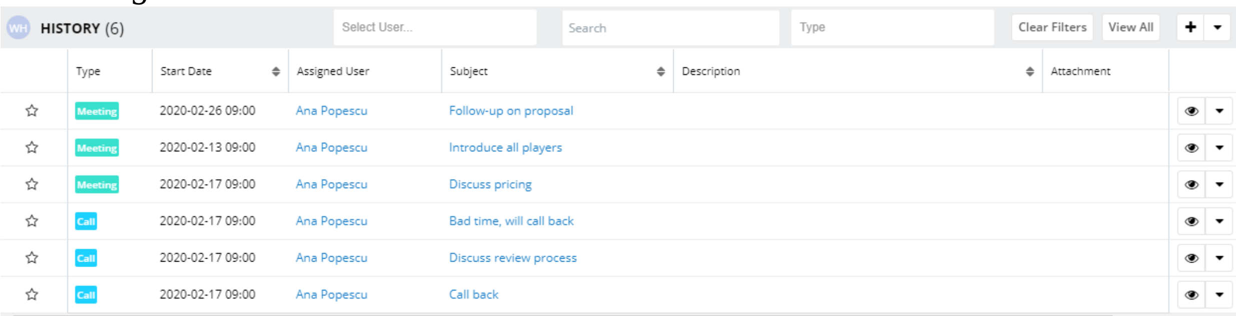
- On the **Activities** Subpanel, the **Inline Actions** dropdown menu includes the following actions:



1. **Edit**: The button opens a drawer with the corresponding record in edit mode.
2. **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.

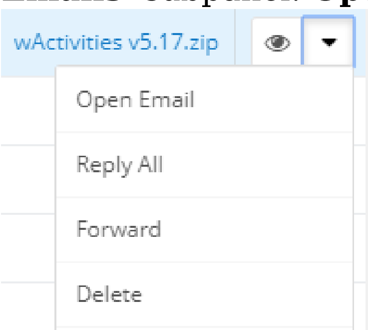
3. **Close**: The button will complete the activity and change its status to Held or Completed. It will also move the record to the History subpanel.

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



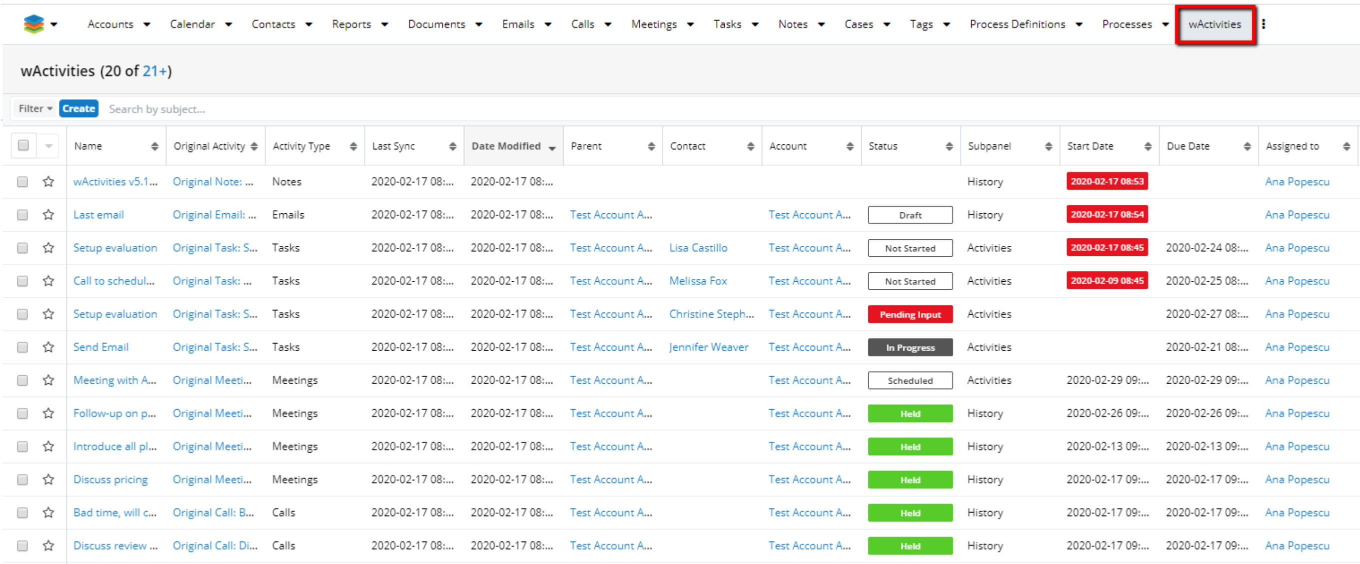
1. **Edit**: The button will open a drawer with the corresponding record in Edit mode. When the changes are saved, the wActivities record and the original corresponding record will be updated.
2. **Unlink**: The button will unlink the activity from the record from the wActivities panel and from its original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



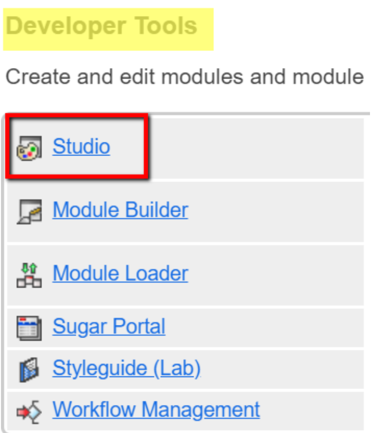
Configuring wActivities Subpanel Columns

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

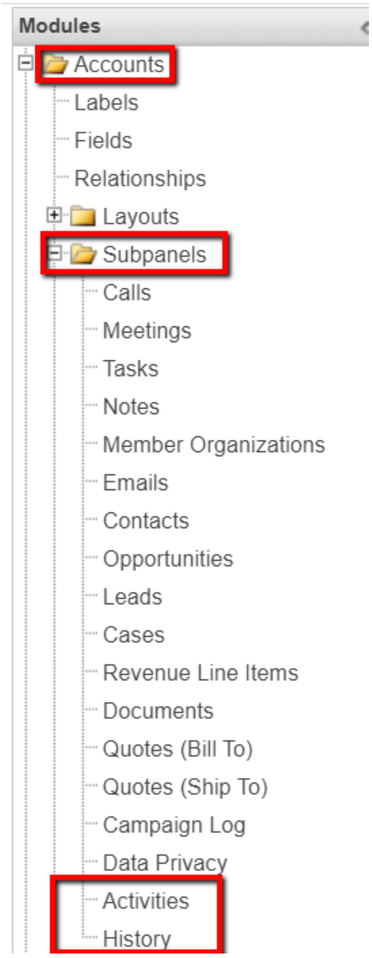
Studio

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

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



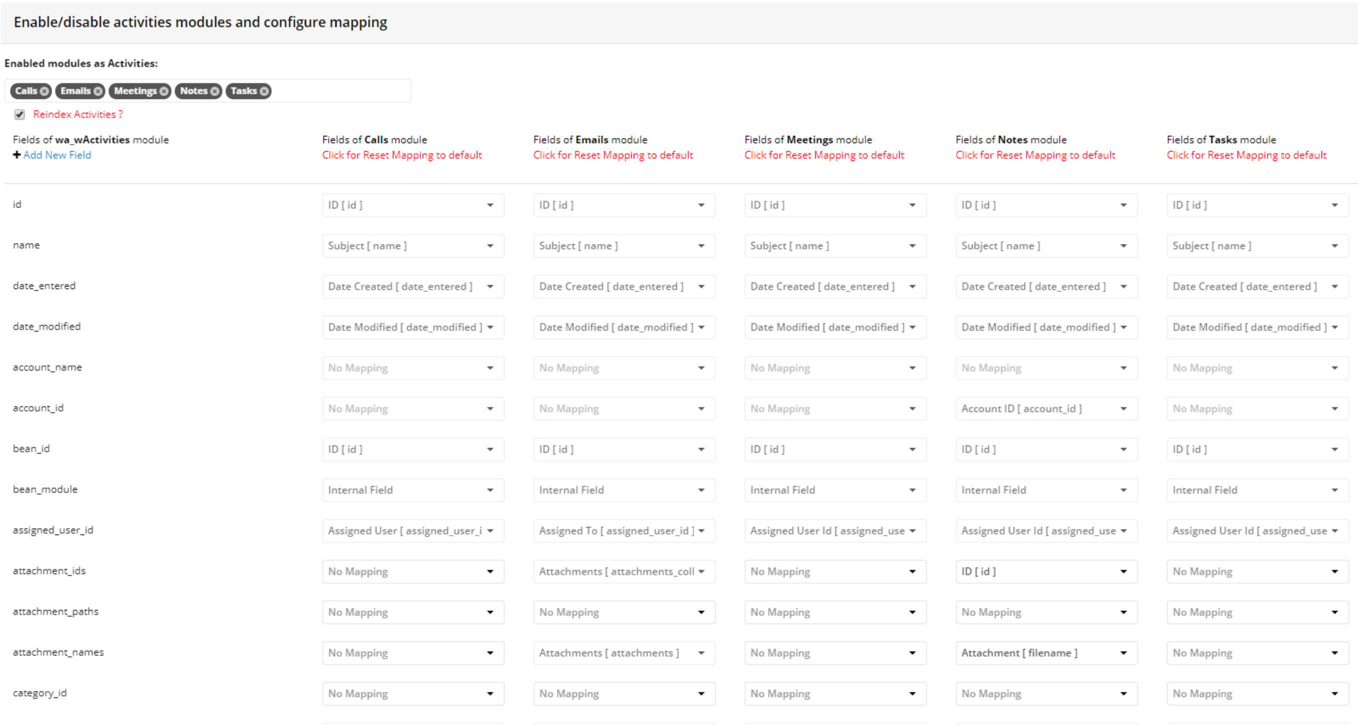
Go to the Module where you want to apply the configuration options and choose **Subpanels**.



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!



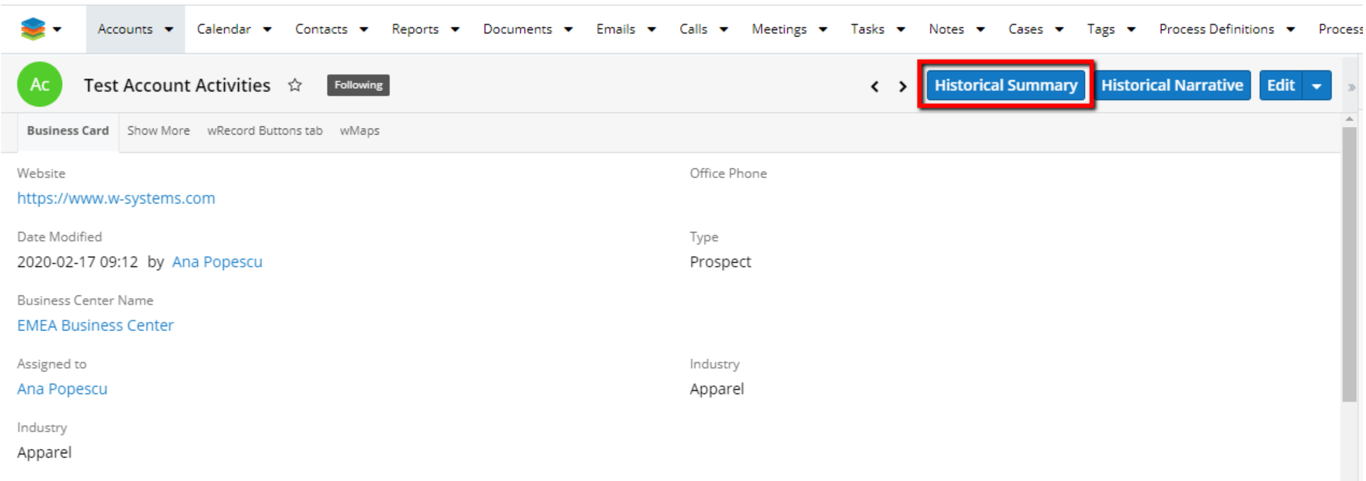
Users can enable other modules and change the configuration options by following the steps:

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.

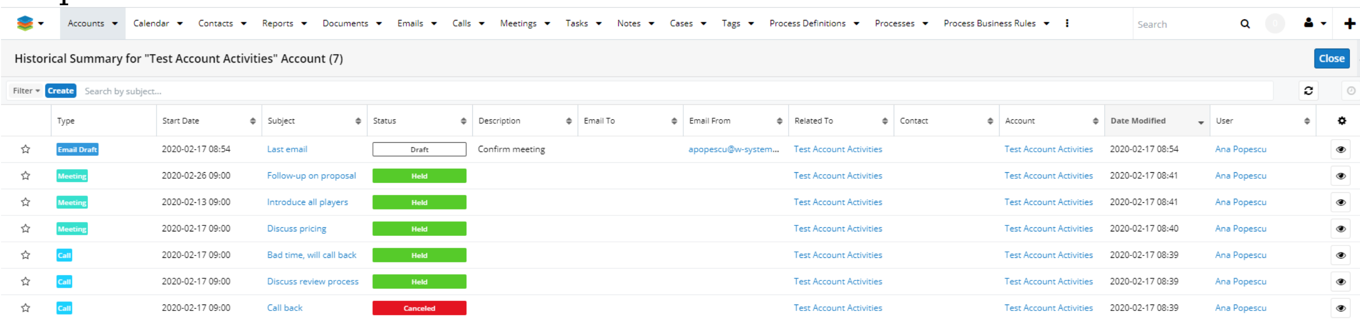
- Choose a Start / End Date
- Select the enabled module from the Activity Name dropdown menu
- Press on Queue Queries
- Process Queue Now.

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.



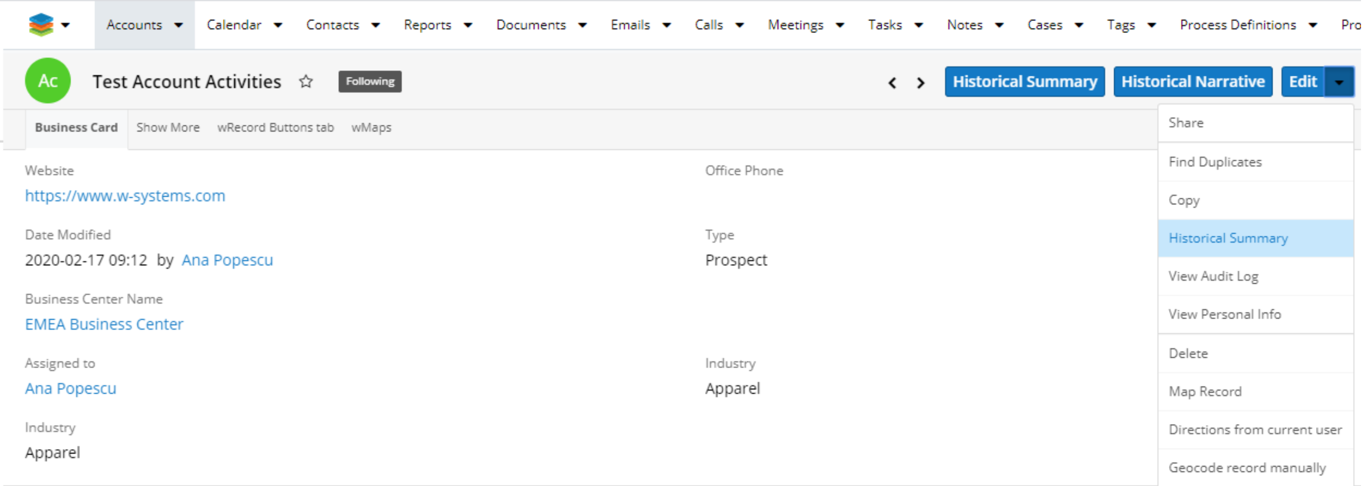
The button opens a **List View** drawer with all **wActivities** from the **History** subpanel.



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

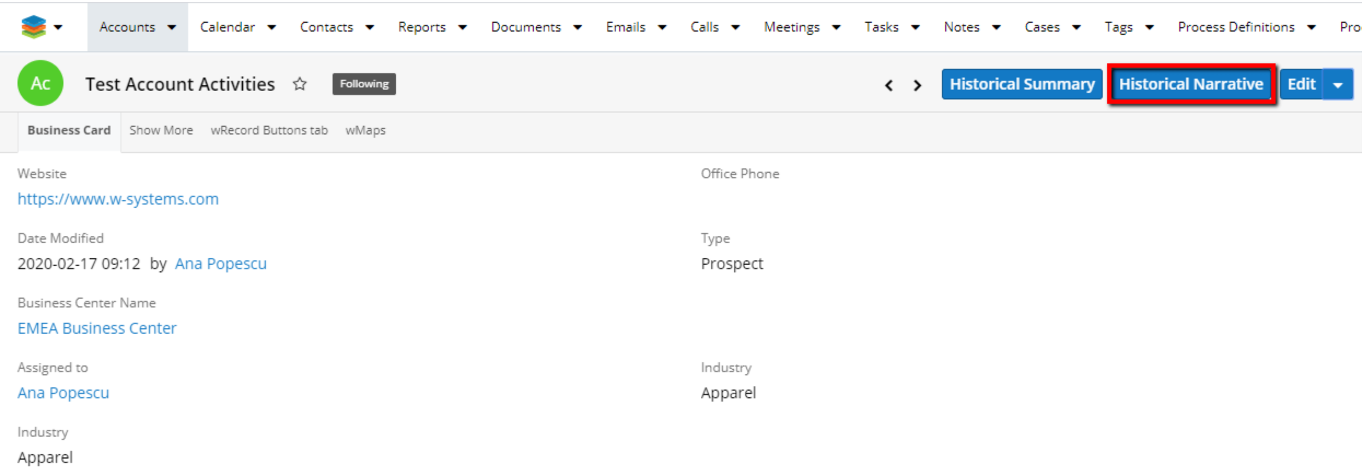
- Type
- Subject
- Start Date
- Status
- Description
- Email From
- Related Contact
- Date Modified
- User

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.

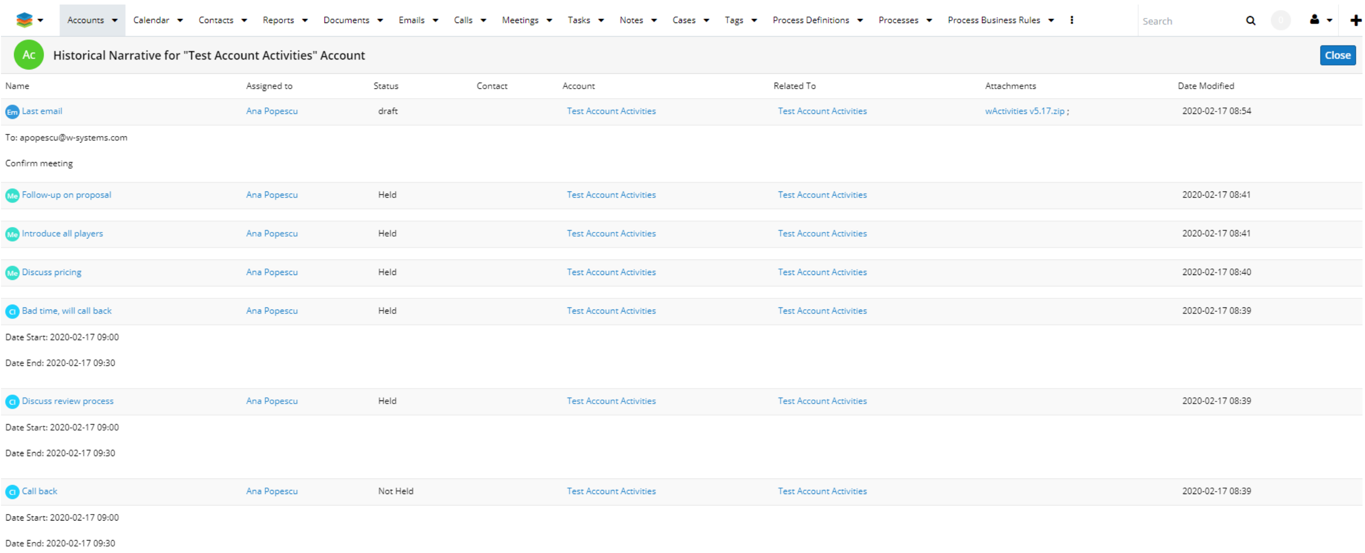


Historical Narrative

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.



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