

How to Log Activity

1) Add New Activity

The screenshot shows the PORTERS HR-Business Cloud interface. At the top, there is a navigation bar with tabs for Client, Recruiter, Job, Person, Resume, Process, Sales, and Activity. Below this, the 'Client List (2)' is displayed. The first client, 'Sample Client 01', is selected, and its context menu is open. The 'Add Activity' option is highlighted with a red box. The context menu includes options like Detail, Edit, Copy, Delete, Document, Email, Google Search, Yahoo Search, and Add Activity. The table below shows two client records with columns for Name, Address, Owner, Memo, Phase, and Success For Sale. The 'Add Activity' button is also visible in the bottom left corner of the interface.

Name	Address	Owner	Memo	Phase	Success For Sale
Sample Client 01	Sample Address (Client)	N/A Catherine Porters	Sample Memo	Phase Date	
Sample Client 02	Sample Address (Client)	N/A Catherine Porters	Sample Memo	Phase Date	2014/05/16 00:00:00

In this example, we will log a telephone conversation memo in Client.

In the Sublist of the record where you want to log the activity, click the "Add New" button of the Action menu.

- ※ Activity log can be done in each of the global menu screens.
- ※ To enable or disable activity in the Sublist, refer to the manual entitled "Customization".

- ※ There is a possibility that the screen image might change.
- ※ In this manual, the default menus displayed are the default settings.
To change the global menu display settings, please refer to the document "How to Customize the Global Menu".

2) Date

Activity- New

Members

Resource Client Job Resume None

Resource ID Sample Client 01

Activity Information

Activity ID

Activity Owner N/A Stacie

From 2015/07/22 16:10 NOW

To Jul 2015

Title

Memo

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

Activity Participants N/A Stacie

Equipment Meeting Room A Meeting Room B Projector A

System Information

Date Created Date Updated

Registered by Updated by

[Send notification email](#)

Save Cancel

To enter the From Date, you can either use the calendar or set it directly.

✘ When you click on the NOW mark, the Current Date and Time are displayed.

3) Title and Memo

Activity- New

Members

Resource Client Job Resume None

Resource ID Sample Client 01

Activity Information

Activity ID

Activity Owner N/A Stacie

From 2015/07/22 16:30 NOW

To 2015/07/22 17:30 NOW

Title Call

Memo Answering machine

Activity Participants N/A Stacie

Equipment Meeting Room A Meeting Room B Projector A

System Information

Date Created Date Updated

Registered by Updated by

[Send notification email](#)

Save Cancel

Set the Title and the Memo. Then click the "Save" button.

4) Activity View

Client List (2)

Contact(0) Negotiation(0) Success For Sale(1) Lost(0)

Sample Client 01	Client Name	Sample Client 01
	Address (Client)	Sample Address (Client)
	Client Owner	N/A Catherine Porters
	Memo	Sample Memo

To display the detail view, click the title.

Client | Sample Client 01 (10001)

Edit Copy Delete Document Email Google Search Yahoo Search Add Activity

Basic Information

Client ID	Sample Client 01	Zip	
Client Name	Sample Client 01		
Client Owner			
Memo	Sample Memo		

Opportunity

Phase (Current)	
Phase Date (Current)	
Phase Memo (Current)	

System Information

Date Created	2014/05/16 04:23:52
Registered by	N/A Catherine Porters

Edit Copy Delete Document Email Google Search Yahoo Search Add Activity

Sublist | Activity Add New

Activity ID	From	Title	Memo
10015	2014/10/30 08:15:00	Call	Answering machine

Activities can be viewed in the "Sublist Activity "

※In case if the activity list is not up to date, click the refresh button.

Sublist | Job Add New Bulk Update Job List

Job ID	Position	Phase	Phase Date
Sample Job 01(JobId:10001)	Sample Job 01(JobId:10001)	Close	2014/10/31 08:00:00
Sample Job 03(JobId:10003)	Sample Job 03(JobId:10003)	Close	2014/10/31 08:00:00
Sample Job 04(JobId:10007)	Sample Job 04(JobId:10007)		
Sample Job 05(JobId:10008)	Sample Job 05(JobId:10008)		
Sample Job 06(JobId:10009)	Sample Job 06(JobId:10009)		
Sample Job 07(JobId:10010)	Sample Job 07(JobId:10010)		
Sample Job 08(JobId:10011)	Sample Job 08(JobId:10011)		

Sublist | Recruiter Add New Bulk Update Recruiter List

Recruiter ID	Recruiter Name	Division	Title	Teleph
Sample Recruiter 01	Sample Recruiter 01	Sample Division	Sample Title	00-000