# 5

# Activities

The Activities section of PRIMO enables you to keep track of telephone conversations, meetings, important dates, Offer Histories, and lists of things to do. Letters and other documents can be stored along with these Activities.

An Activity can be a stand-alone record or it can be linked to an Organisation, Property or Requirement record. Moreover, an Activity record can be simultaneously linked to more than one type of record. Links between an Activity and other records can be removed, leaving a "stand-alone" Activity. All Organisation, Property and Requirement records linked to an Activity can be opened directly from within the Activity record.

An *Activities page* is located on the last page of every Organisation, Property and Requirement record. From this page you can view and open Activities that are already linked to the record. Additionally, the *Activities page* of the Organisation record lets you view all the Activities linked to the Property and Requirement records that are themselves linked to the Organisation record you are viewing.

An Activity record contains three pages:

- General Information: Details, Remark, Time, Cost, User Rights, Available Links and Existing Links,
- Letters and other text documents,
- OLE Documents, such as MSWord®, MSExcel®, MSPowerPoint®…

This chapter describes:

- the *Activities page* of Organisation, Property and Requirement records,
- the different functions of Activities,
- how to create a new Activity record,
- how to give other users access to an Activity record you have created,
- how to work with records linked to an Activity record or vice-versa,
- how to handle OLE documents,
- Modification-Activities.

## The Activities page of Organisation, Property and Requirement Records

The *Activities page* is always located on the last page of a record (Organisation, Property and Requirement), and it looks and works the same way for all records. One exception is the *Organisation:Activities page* which contains two additional filters; they contain a list of all the Property and Requirement records linked to the Organisation record. These filters can be used to show only those Activities pertaining to a specific Requirement or Property.

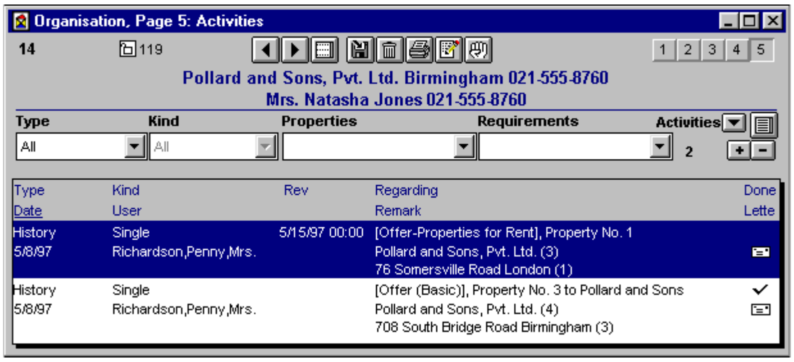


**Fig. 5-1:** Record Header and Filters, *Organisation:Activities page*

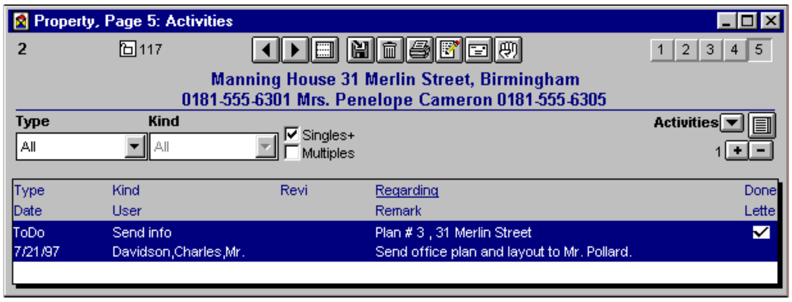


**Fig. 5-2:** Record Header and Filters, *Property:Activities page*

Below the record header are the filters and to the right of those is the number of Activities listed.

Four additional icons are available to be used as follows:

- The "**+**" icon allows you to create a new Activity record.

➔ **Tip:**
A newly created Activity will appear selected at the top of the Activities list, regardless of the filters you have chosen. To sort or filter the new Activity, you must reactivate the appropriate filters.

- The "**-**" icon allows you to delete an Activity.
- The "list" icon allows you to transfer the Activities listed on the last page of a record to an *Activity Search and List window*. Once you have transferred a list of Activities into an *Activity Search and List window* you can manipulate the list, print it and even export it if your Program Administrator has given you authority to do so (for more information on lists see Chapter 6, "Lists").
- The pop-up menu ("triangle" icon), located next to the "list" icon, gives you the choice to view *regular* Activities only, Modification-Activities only, or both. For more information on this subject see the section entitled "Modification-Activities" in this chapter, page 5-25.

The last column of the list on any *Activities page* shows whether an Activity is "Done" (✓), and whether it has a document (✉) attached to it.

## Classifying Activities

Activities serve many, many purposes. To enable you to better filter and categorise the Activities you create, PRIMO classifies Activities in two ways: by "Type" which is a broad-based classification and by "Kind" which fine tunes the first classification. The "Type" and "Kind" drop down lists portray this two-stage classification. For a more in depth explanation on how to classify Activities, see the section entitled "Activity "Type" and "Kind"" in this chapter, page 5-7.

Organisation, Property and Requirement records all contain *Activities page*s with "Type" and "Kind" filters. The *Organisation:Activities page* contains two additional filters for Properties and Requirements linked to the Organisation record, and the Property and Requirement records have additional filters for Offer-Histories. (cf. section entitled "During Offer: Create History-Activity Record", Chapter 15, "Administration", page 15-6).

To apply a filter, proceed as follows: First, choose a broad category from the "Type" filter, then select a fine-tuning value from the "Kind" filter (cf. section entitled "Activity "Type" and "Kind"" in this chapter, page 5-7). If you do not wish to apply a specific "Kind" filter, choose the filter value "All" instead.

The *Activities page* of Requirement and Property records are different from that of the Organisation record in that if you select "History" from the "Type" filter and then look at the "Kind" filter, you will notice that an "Offer" filter has been added to the list. Additionally, on the *Activities page* of Requirement and Property records are check-boxes for filtering "Singles+" and "Multiples" Offer-Histories. By selecting these filters you can view the History-Activities that were created every time you sent out an Offer. These Activities can be filtered so that they are listed individually (“Singles+” filter) or grouped together (“Multiples” filter). For more information on this subject see the section entitled “During Offer: Create History-Activity Record“, Chapter 15, “Administration“, page 15-6).

➔ **Tip:**
The plus symbol after the “Singles” filter signifies that an Activity listed individually will also be shown if it is part of a grouped “Multiples” Activity.

## Additional Filters on the Organisation: Activities Page

The last page of the Organisation record, the *Activities page*, contains two additional filters that list the Properties and Requirements linked to the Organisation record. Activities listed on the Activities page of the Organisation record can be filtered to show only those Activities pertaining to a specific Requirement or Property. These filters are always available and are used in addition to the basic "Type" and "Kind" filters.

The following filters are available:

- [All]
- [None]
- list of linked Properties and Requirements

Linked Properties and Requirements appear as follows in the drop down filters:

- Properties: reference number and address
- Requirements: reference number, department and status

# Activity:General Information page

## Overview

The *Activity: General Information page*, besides the record header, is divided into seven sections:

- Details: Type, Kind, Agent, Importance (“imp.”), Start Date and end date (“to”), Review Date, Done, Created by, Modified by,
- Remark: Reference and Remark field,
- Time (Minutes): Expected time and Actual time,
- Cost: Expected, Actual and Billed costs,
- User Rights,
- Available Links,
- Existing Links.

Each individual section is described hereafter. Following that is an explanation differentiating the "Type" and "Kind" Activity classifications. Finally, you will be given instructions on how to create a new Activity record.

## Record Header


**Fig. 5-3:** Activity Record: Record Header

A “plus” icon ("**+**") has been added to the record toolbar to facilitate the creation of new Activity records.

The title bar below the record header shows the following information: “Type” of Activity (e.g. ”ToDo”), the “Kind” of Activity (e.g. “Send Letter”), the reference and the first line of text entered in the “Remark” field.

## Details Section

Basic information pertaining to the Activity is entered in the Details section fields of the *General Information page*. They are:

- Type and Kind (cf. section entitled “Activity “Type” and “Kind”“ in this chapter, page 5-7),
- Agent,
- Importance (“imp”),
- Start Date and end date (“to”),
- Review Date,
- Done,
- Created by,
- Modified by.

## Remark Section

The Remark section contains two fields. The first field is the “Regarding” field. You must say what the Activity is in reference to (up to 80 characters). You cannot save or close an Activity if you have not first entered information in the “Regarding” field. The second field of the Remark section is the “Remark” field. This is where you enter any additional information pertaining to the Activity (up to 2000 characters). Entering information in this field is optional.

## Time and Cost Sections

The Time and Cost sections are there to help you plan an Activity.

## User Rights Section

The User Rights section lets you choose which user, beside yourself, may have access to this Activity. More than one user can be given rights to an Activity. If a User Right section is left empty, PRIMO translates this to mean that all users have access to the Activity.

## Existing Links Section

As a rule, Activities are linked to Organisations, Properties and Requirements. A linked Activity can further be linked to other Organisations, Properties and Requirements. These links can be removed so that the Activity becomes a stand-alone record.

Organisations, Properties and Requirements linked to an Activity record can be opened from within the Activity record. To open a linked record, select it from the list of linked records and either double-click on it or press F2.

This works both ways: If you go to the *Activities page* of a record you will see listed all the Activities linked to that record. To open an Activity listed on the *Activities page* select it and double-click on it or press F2. The Activity record will open and the record you opened the Activity from will be listed in the Existing Links section.

Activities can be used to link, or group, several different types of PRIMO records together. Instead of typing the client's name, the broker's name and the property's address into the "Remark" field of an Activity record and then searching for each record individually to access the information, you could add these records to the Activity's "Existing Links" section. In that way, different records associated with a particular task can be accessed through a single "master" Activity.

The icons "**+O**", "**+P**", "**+R**" allow you to add an Organisation, Property or Requirement to the Existing Links section of the Activity record. The "**-**" icon allows you to remove a record from the Existing Links section of the Activity record. Clicking on the "minus" icon does not delete the record.

➔ **Tip:**
When you create an Activity record from another record (Organisation, Property or Requirement), that record is automatically added to the Existing Links section of the new Activity record.

The Existing Links section is further explained in the section entitled "Working with Existing Links" in this chapter, page 5-12.

## Available Links Section

Clicking on the "Update" button, which is located above the Available Links section, will scan all open windows in order to produce a list of records that you can transfer to the Existing Links section. This list will include:

- open records,
- Property and Requirement records linked to an open Organisation record,
- open *Search and List windows* with a resulting search list.

To transfer a link listed in the Available Links section to the Existing Links section, select it and click on the "**--->**“ button (double-clicking on line item will produce the same effect).

If while you are working on an Activity record you open another record (Organisation, Property or Requirement), you can add the newly opened record to the Available Links section of the Activity record by clicking on the "Update" button. For a more detailed explanation on how to work with available links see the section entitled “Working with Existing Links“ in this chapter, page 5-12.

## Activity “Type” and “Kind”

Activities serve many different purposes. PRIMO has two main Activity record classifications: "Type" which acts as a broad-based classification (or filter) and "Kind" which fine tunes the first classification. Each Activity “Type” is teamed with specific “Kinds” of Activities as you can see from the list below:

- **Misc.:** Call, Called, Fax from, Fax to, Internal call, Letter, Memo
- **Meeting:** At client, External, Here with client, Internal, Solicitor, Other, Private
- **ToDo:** Write memo, Send offer, Send invoice, Send info, Send letter, Phone
- **History:** Single and multiple Activities (You may not create these kinds of Histories yourself; they are created automatically for you when making offers)
- **Memo:** Meeting, Visit
- **Contact:** With Owner, With Client, General
- **OLE-Document:** (no specific kind of Activity)

These selections can be altered by Eisen&Partner, GmbH upon your request.

The above Activity classifications have been designed to be used as follows:

**Misc.:** Notes regarding phone calls, letters and faxes are entered in this type of Activity.

**Meeting:** This type of Activity allows you to schedule a meeting. When you create a "Meeting" Activity, the scheduled meeting is automatically entered in your Daily Planner (cf. Chapter 7, “Daily Planner“).

**ToDo:** This type of Activity allows you to make a note of something that needs to get done. ToDo Activities are carried over to the ToDo list of Daily Planner and remain there until they are “Done” (cf. Chapter 7, “Daily Planner“).

**History:** An Offer History-Activity is automatically created whenever you make an offer from a Property or Requirement record. Whether a single "Multiple” Activity, several "Single” Activities, or both, are created during an offer is predetermined by the Administrator (cf. section entitled “During Offer: Create History-Activity Record“, Chapter 15, “Administration“, page 15-6) and cannot be altered. For information on how to make an offer see Chapter 10, “Offers“. A History-Activity is automatically created when you print a Mailing. For information on how to send a mailing, see Chapter 11, “Mailings“.

**Memo:** This type of Activity should be used for making notes about certain activities, events, meetings and/or discussions that have taken place.

**Contact:** Use this type of Activity to record any phone conversations or personal contact you have had with clients or other agents, etc.

**OLE Document:** Used for linking an OLE document to any PRIMO record via an Activity.

# Creating a New Activity Record

## General Information

The various Activity types are related to different sections of PRIMO. In some cases, the Activity is automatically created for you. In this chapter you will learn how to create a new Activity.

There are different ways of creating an Activity:

- By clicking on the plus icon located on the *Activities page* of Organisation, Property and Requirement records. As a rule, this is the way most Activities are created.
- By selecting "New... Activity" from the PRIMO Data menu.
- By clicking on the “New” icon on the PRIMO toolbar and then selecting “Activity”.
- By clicking on the “**+**” icon on the Activity record toolbar.
- By clicking on the letter icon located on Organisation, Property and Requirement record toolbars.
- Offer History-Activities are automatically created when you create an offer, unless you choose to deactivate the “History” check-box located on the offer page (cf. section entitled “During Offer: Create History-Activity Record“, Chapter 15, “Administration“, page 15-6 and section entitled “History-Activity Record“, Chapter 10, “Offers“, page 10-9).
- Mailing History-Activities are automatically created when you print a mailing. However, a dialogue box will appear allowing you to confirm or cancel your decision to create a history for the mailing.

The following section explains how to:

- Assign Activity types,
- Use the Time and Cost sections,
- Limit user access to an Activity,
- Link an Activity to other records,
- How to mark an Activity as “Done”.

To accomplish any of the above, the first step is always to create a new Activity. No matter what the purpose of the Activity, the starting point is always be the same: open a new Activity.

**Important:**
Take special note of the explanations in the section entitled "Automatically Added Existing Links" in this chapter, page 5-12.

**Prerequisite:**
You are on the *Activities page* of an Organisation, Property or Requirement record.

1. Click on the "**+**" icon located above the Activities list.

   A new Activity record will open to *page 1*:

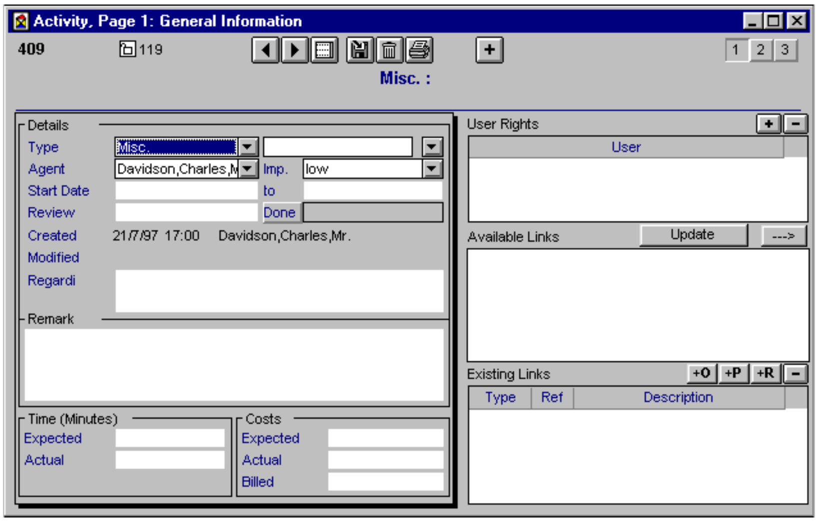


**Fig. 5-4:** Activity:General Information page

**Tip:**
Whenever you create a new Activity, the default Activity type selected is "Misc."

2. Select the type of Activity you require (if different from "Misc.") from the "Type" drop down list.


**Fig. 5-5:** Activity "Type" Drop Down List

3. Click on the drop down list to the right of the "Type" drop down list to select the "Kind" of Activity you require.

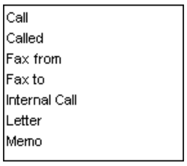


**Fig. 5-6:** Activity “Kind” Drop Down List

➔ **Tip:**
The entries in the “Kind” drop down list depend entirely on the Activity “Type” you have selected (cf. the above section entitled “Activity “Type” and “Kind”“ in this chapter, page 5-7).

4. Your name will automatically be entered in the Agent field. To choose another PRIMO user as the person responsible for the Activity record, select that person from the “Agent” drop down list.

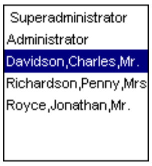


**Fig. 5-7:** “Agent” Drop Down List

The name you have chosen is entered in the “Agent” field.

➔ **Tip:**
The PRIMO user entered in the agent field is the person who will be reminded when the time comes to review the Activity.

5. Select the importance of the Activity from the “imp.” drop down list.


**Fig. 5-8:** “imp.” (Importance) Drop Down List

➔ **Tip:**
The “Start Date”, “to”, and “Done” fields, along with the “Done” button, will determine if an Activity is visible in the Daily Planner (see Chapter 7, “Daily Planner“ and section entitled “Marking an Activity Record “Done”“ in this chapter, page 5-17).

6. If necessary, set a review date for the Activity in question. It is the person listed in the "Agent" field who will be notified when it is time to review the Activity. Additionally, when you enter a review date a “bell” icon will appear at the top of the Details section of the *Activity:General Information page*.

For more information on this subject see Chapter 8, “Review Dates“.

A pop-up calendar opens when you tab into the “Review” field.

The use of the pop-up calendar is explained in section entitled “Pop-up Calendar“, Chapter 1, “Basic Functions“, page 1-20.

➔ **Tip:**
The greyed-out “Created” and “Modified” fields are automatically filled in by PRIMO and cannot be altered manually.

7. Enter a reference in the “Regarding” field (up to 80 characters) and then describe the Activity in the “Remark” field (up to 2000 characters).

➔ **Tip:**
When entering information in the "Regarding" and "Remark" fields you should make sure that the information is precise and will be understood not only by yourself, but by other PRIMO users as well. Text entered in both fields is searchable, which is another reason for entering precise information. The information entered in the "Regarding" field and the first line of text entered in the "Remark" field are added to the record title bar.

8. Enter the duration and the cost of the Activity.

You will want to enter the expected time and cost when you create the Activity, and enter the actual time, cost, and billing price when you are done.

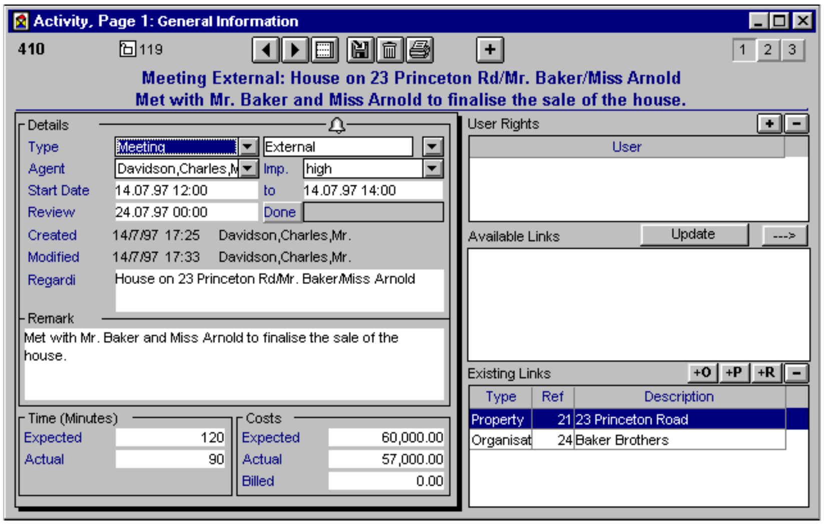


**Fig. 5-9:** Completed Activity:General Information page

9. When you have finished entering data in the Activity record, close it.

The Activity will automatically be saved and will be added to the Activities already listed on the *Activities page* of the record you created the Activity from.

If you make modifications to the Activity record at a later date, when you close the record the following dialogue box will open:

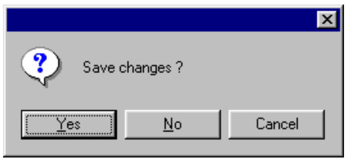


**Fig. 5-10:** Dialogue Box: “Save Changes?”

10. Click on “OK”.

    The modifications are saved and the record will close itself.

## According User Rights

The User Rights box is where you may add the users to whom you wish to give access to the Activity. You may accord user rights to more than one PRIMO user.

1. Click on the “**+**“ icon.

   A dialogue box with a list of all the PRIMO users will open.

2. Select a user. You may do this by using the mouse or by going through the list using the ”↓“ and “↑“ arrows.
3. Click on “Ok“.

   The user you have chosen is entered in the User Rights section and now has access to the Activity. The dialogue box remains open.

4. To add another user to the User Rights section, repeat steps 2 and 3.
5. When you have finished adding users to the User Rights section, close the dialogue box by clicking on “Cancel”.

➔ **Tip:**
PRIMO users that are not listed in the User Rights section will not be able to search for the Activity in question, nor see it listed on the last page of a record. If the User Rights section is empty, then all PRIMO users have access to the Activity.

To **remove** a user from the User Rights section, select the user name and click on the “minus” icon.

## Working with Existing Links

### Automatically Added Existing Links

Whenever you create a new Activity, PRIMO will automatically add to the Existing Links section any links that exist between the Activity and other records. Automatic links are created in the following instances:

- Whenever you click on the "**+**“ icon on the *Activities page* of a record (Organisation, Property or Requirement) to add an Activity to that record.

- Whenever, you create an Activity by clicking on the letter icon on the record toolbar.
- Whenever, you write an offer and an Offer History-Activity is created (unless you turn this option off). For more explanation see the section entitled “During Offer: Create History-Activity Record“, Chapter 15, “Administration“, page 15-6 and the section entitled “History-Activity Record“, Chapter 10, “Offers“, page 10-9. Which Existing Links shall be added to a History-Activity are pre-determined by the Administrator (cf. section entitled “Link Histories to Organisation“, Chapter 15, “Administration“, page 15-7).

Automatic existing links are not created in the following instances:

- Whenever you create a new Activity by going through the Data Menu.
- Whenever you create a new Activity by clicking on the “New” icon on the PRIMO desktop toolbar.
- When you create a new Activity by clicking on the “**+**“ located on the Activity record toolbar.

In these cases it is recommended that you add any existing links as soon as the Activity record is created. In practice, “Orphan” Activities are not easy to keep track of.

An exception would be “ToDo” Activities created from within the Daily Planner (cf. Chapter 7, “Daily Planner“). All “ToDo” Activities should be created and dealt with from within the Daily Planner.

## Adding Existing Links

The subject of existing links automatically added to new Activity records has been discussed above (cf. section entitled “Automatically Added Existing Links“ in this chapter, page 5-12).

Whether existing links are automatically added to a new Activity record or not, you may manually add an existing link to the Activity. To do this you must go to the Available Links section located in the lower right of the *Activity:General Information page.*

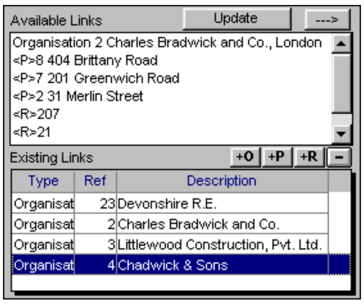


**Fig. 5-11:** “Available Links” and “Existing Links” Sections

The list of Available Links shows:

- Any open record, listed by the type of record, e.g. “Organisation”, “Property” or “Requirement”, followed by the record number and a short description.

- Any Property record linked to an open Organisation or Requirement record, listed and marked <O> or <R>, followed by the record number and a short description.
- Any open list, represented by name (e.g. *Organisation Search and List window*), followed by the number of records in the list.

There are several ways of adding an existing link to the Existing Link section of an Activity record. You may add an existing link to:

- *A:* an open record or one that is listed in the Available Links section,
- *B:* a record you want to search for and then open to make sure you have selected the correct one,
- *C:* a record whose details you already know and do not need to look for or open,
- *D:* all the records in a search list that are listed in the Available Links section. The Activity would therefore be linked to several Organisation, Property or Requirement records at once.

The above examples are explained below:

*Example A:*

✓ **Prerequisite:**
You are on *page 1* of the Activity record you have just created, and the record you wish to link to the Activity is opened in the background.

1. If the open record you wish to link the Activity to is not listed in the Available Links section click on the “Update” button.

   The record will appear in the box.
2. Select the record.
3. Click on the “**--->**“ button.

   The record will appear in the Existing Links section of the *Activity:General Information page*.

*Example B:*

✓ **Prerequisite:**
You are on *page 1* of the Activity record you wish to modify.

1. Search for and then open the record you are interested in linking to the Activity. (cf. section entitled “Overview: Searching for Records“, Chapter 1, “Basic Functions“, page 1-21)
2. Go back to *page* 1 of the Activity record.

➔ **Tip:**
To go back and forth between open records use the Window menu.

⚠ **Important:**
Do not click on the “Close” icon (icon with the red cross-mark) on the PRIMO toolbar, nor should you click on any of the other toolbar buttons as this would execute a command you do not require at this time.

3. Click on the “Update” button located at the top of the Available links section. This will list all open records and search lists available to be linked to the Activity record in question.
4. Select the records or lists you wish like to link to the Activity record.
5. Click on the “**--->**“ button.

   The records and lists you have selected are now listed in the Existing Links section.

The Activity record is now linked to the records and lists in the Existing Links section.

*Example C:*

✓ **Prerequisite:**
You are on *page 1* of the Activity you wish to modify.

1. Click on the “**+O**“, “**+P**“ or “**+R**“ buttons if you wish to create a link between the Activity record and an Organisation, a Property or a Requirement record.

   The following “Search and link” dialogue box will open:

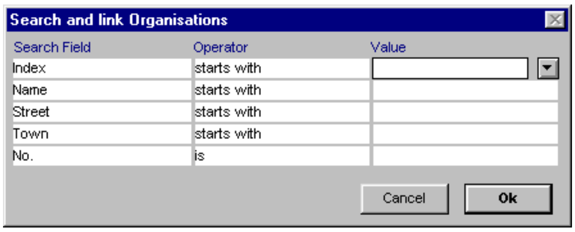


**Fig. 5-12:** Dialogue Box: “Search and link Organisations”

2. Enter the appropriate search criteria in the search fields (as described in the section entitled “Search Criteria“, Chapter 1, “Basic Functions“, page 1-30).
3. Start the search by clicking on “OK”.

   A dialogue box will open listing all the records that match the search criteria you entered:

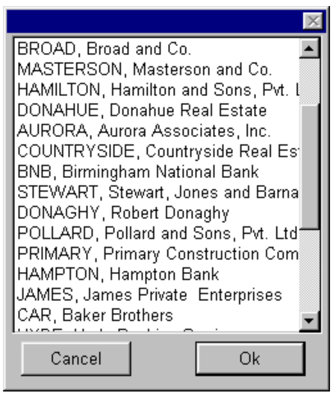


**Fig. 5-13:** Dialogue Box with Results of Organisation Search

➔ **Tip:**
In the case of an unsuccessful search you will get the following message: "Nothing Found". Click on "OK" and double-check the search criteria. If the search criteria is not the problem, click on "Cancel" to stop the search and try adding an existing link by using the method describe in Example A.

4. Select the record you require and click on "OK".

   The dialogue box will close and the record you selected will be listed in the Existing Links section.

   If the record you require is not listed in the dialogue box, or if you cannot recognise it among those listed, cancel the search and follow the steps suggested in the previous tip.

*Example D:*

✓ **Prerequisite:**
You are on *page 1* of the Activity you wish to modify.

1. Open the appropriate *Search and List window* (e.g. Requirements) and search for records you wish to add to the Existing Links section of the open Activity record (cf. section entitled “Search and List Windows“, Chapter 1, “Basic Functions“, page 1-17 and section entitled “Working with Lists“, Chapter 6, “Lists“, page 6-5.)
2. Select the open Activity record from the Window menu.
3. Click on the “Update” button located above the Available Links section.

   All open records and lists will be listed in the Available Links section. Additionally, all Property and Requirement records linked to an open Organisation record will also be listed in the Available Links section.
4. Select the list you wish to transfer to the Existing Links section.
5. Click on the “**--->**“ button.

   All the records that were a part of the list you transferred are now individually listed one under the other in the Existing Links section. You have linked the Activity record to several records at once.

## Removing Existing Links

Select the record you wish to remove from the Existing Links section and click on the “**-**” icon located above that section. This manoeuvre only removes the link that exists between the Activity record and the record in question. It does not delete the record.

⚠ **Important:**
Be careful not to confuse removing a linked record from the Existing Links section with deleting an Activity record. Clicking on the “rubbish bin” icon on the record toolbar actually deletes the entire Activity record, information, links and all (not just the link you wish to remove from the Existing Links section). For more information on

the subject see the section entitled “Application Toolbar“, Chapter 1, “Basic Functions“, page 1-10).

You should also read the suggestions we make regarding the topic of deleting records, notably the section entitled “Changing Record Status Instead of Deleting“, Chapter 1, “Basic Functions“, page 1-38.

### Working with Existing Links

To open a record listed in the Existing Links section, double-click on it with the mouse, or select it and press F2.

## Marking an Activity Record “Done”

✓ **Prerequisite:**
You are on *page 1* of an Activity record.

1. Enter the actual time and cost of the Activity.
2. Click on the “Done” button located to the right of the “Review” field.

   The current date and time are automatically entered in the "Done" field. You cannot change this information manually. When you click on the "Done" button, a checkmark will appear at the top right of the Details section and will replace any alarm that was showing there previously.

   If a review date was previously entered you will be asked if you wish to clear it:

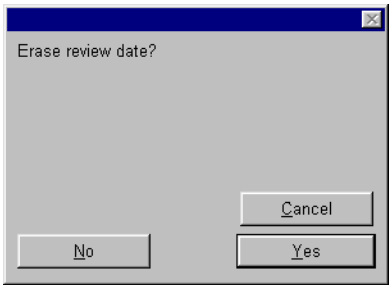


**Fig. 5-14:** Dialogue Box: “Erase review date?”

3. Answer by clicking on the appropriate button.

   Clicking on “Cancel” will cancel the entire disposal operation.

⚠ **Important:**
You cannot undo the disposal of an Activity once you have saved any changes you have made. However, if you have inadvertently clicked on "Done", you can cancel the process by closing the record without saving the changes. You will, of course, lose any other modifications you have brought to the Activity, but the record will not be disposed. If you have information to add to an Activity you have disposed of, you must create a new Activity.

# Activity:Letter Page

The second page of the Activity record has an built-in word-processor that handles all basic correspondence and documents, except Property-related documents (cf. also Chapter 9, “Word-Processor“).

In fact, property-related documents (e.g. offers, layouts, newspaper ads) are handled directly from the Property record.

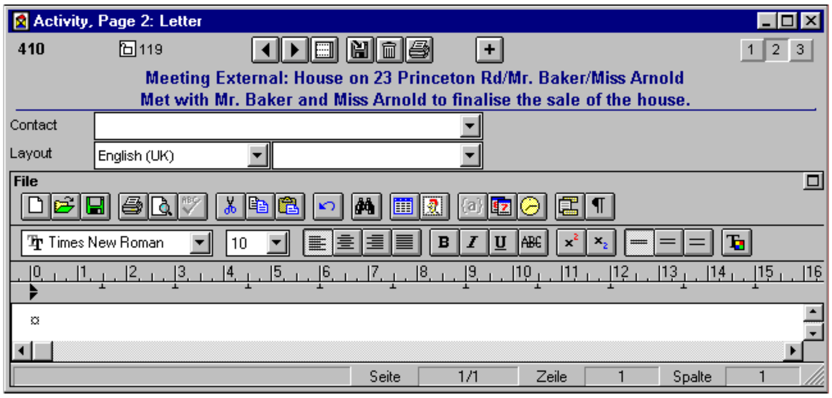


**Fig. 5-15:** Activity:Letter page

The *Activity:Letter page* is divided into three sections:

- The record header (which is the same for all pages)
- Layout section
- Word-processor section

The Layout section contains three drop down lists: Contact, Language and Layout.

**Contact Drop Down List:** The list of Contacts from the first Organisation listed in the Existing Links section of the Activity will appear in this drop down list. Beneath the list will be an option entitled "**<* * * * cont.* * * *>** “:


**Fig. 5-16:** Layout Section: Contact Drop Down List

You may either select one of the listed Contacts or you may click on

"**<* * * * cont. * * * *>**“. Clicking on the latter will open a dialogue box which lists all the Activity's existing links:

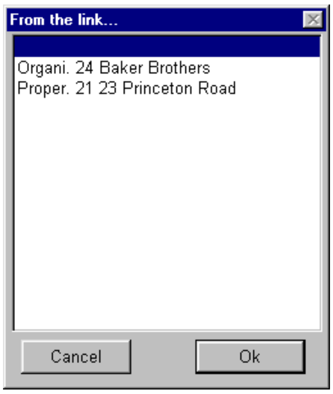


**Fig. 5-17:** Dialogue Box: "From the link..."

Select the desired Organisation. When you reopen the Contact drop down list, it will contain a list of all the Contacts linked with the Organisation you selected.

If you are unable to find the Contact you are looking for, you may need to add the appropriate Organisation record to the Activity's "Exsiting Links" section, (cf. section entitled "Working with Existing Links" in this chapter, page 5-12), or perhaps you may even need to add the Contact to the Organisation record in question.

**Layout Drop Down List:** When you have selected a Contact from the Contact drop down list a choice of layouts suitable for Contacts and of the type "Letters" will appear in the Layout drop down list. (see section entitled "Overview", Chapter 13, "Layouts", page 13-2).

Before selecting a layout you should select the language you will be using from the "Language" drop down list. (This version of PRIMO is programmed for UK English only.)

The layout (which consists of pre-formatted text and merge fields for information such as the date, the contact's address and the greeting) is inserted into the word-processor section and then automatically merged by PRIMO into a formatted document (cf. section entitled "Place-Holders", Chapter 13, "Layouts", page 13-6).

When PRIMO merges a layout, it replaces the address and greeting merge fields with information entered in the Contact record. Therefore, if this information was not entered in the appropriate fields on the *Contact:Address page* (cf. Contacts....), the merge fields will remain unmerged when PRIMO merges the layout into a formatted document. You may either type the address and greeting over the merge fields, or better still, open the Contact record and make the necessary changes. Once you have made the appropriate changes to the Contact record, go back to the *Activity:Letter page* and re-select the contact and layout. The layout should now merge without any problems. For further information about layouts see the section entitled "Trouble Shooting", Chapter 13, "Layouts", page 13-30.

# Activity:OLE-Document Page

OLE stands for "Object Linking and Embedding". In this way a multitude of file-types can be linked to PRIMO. For example, PRIMO can be linked to MSWord® documents, MSExcel® spreadsheets and graphs and MSPowerPoint® presentations and graphics. You can also link many other file types, including photos, videos and sounds to the *Activity:OLE-Document page*.

PRIMO stores the documents in the PRIMO database, which means that these files are accessible to all PRIMO users – User Rights notwithstanding – from any workstation. Thus, the documents can be saved without concern for drive, path and file name.

The editing process of an OLE document – printing included – takes place from within the application you would normally use to create the document. PRIMO's only role when dealing with OLE documents is to open and close the application and save any changes made to the *Activity:OLE-Document page*.

All the functions of host OLE applications (e.g. MSWord®-formatting, -autotext, -macros, and MSWord® and MSExcel® merge fields) are at your disposal without restrictions.

When you click on the "Merge" button on the *Activity:OLE-Document page*, you should see a long list of OLE applications. However, all applications listed must be properly installed if they are to work correctly.

This handbook only teaches how to work with OLE documents when using PRIMO. It does not give advice about OLE applications. For information on how to use a specific OLE application, refer to the application's on-line help or handbook.

If you have stored an OLE document in an Activity, an "OLE" symbol will appear at the top right of the Details section of the *Activity:General Information page*. Additionally, when you store an OLE document in an Activity you should choose "OLE-Document" from the "Type" drop down list located in the Details section.

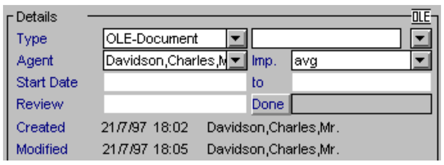


**Fig. 5-18:** Activity:General Information page; Details section with "OLE" symbol

➔ **Tip:**

It is not yet possible to give file names more than the DOS-compatible eight character name. File extensions must not be more than three characters long.

If you cannot properly view the OLE document you have added to an *Activity:OLE-Document page*, increase window's size as described in the section entitled "Changing Window Size", Chapter 1, "Basic Functions", page 1-16), or double click on the document to open it (cf. section entitled "Modifying PRIMO OLE Documents" in this chapter, page 5-24).

## Creating a New OLE Document

**Important:**
If an OLE document already exists when you create a new one, the new document will write over the old document. To modify an OLE document proceed as described in the section entitled “Modifying PRIMO OLE Documents“ in this chapter, page 5-24.

**Prerequisite:**
You have opened a new or existing Activity record. You have selected “OLE-Document” from the “Type” drop down list located on the *Activity:General Information page* (if an Activity type has not already been selected). You have entered a reference in the "Regarding" field and a remark in the "Remark" field for future reference. You are now on the *Activity:OLE-Document page*:

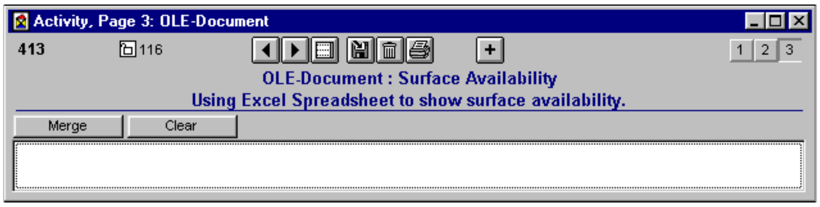


**Fig. 5-19:** Activity: OLE-Document Page (Blank)

1. Click on the “Merge” button located above the empty word-processor.

   A dialogue box entitled “Insert Object” will open:

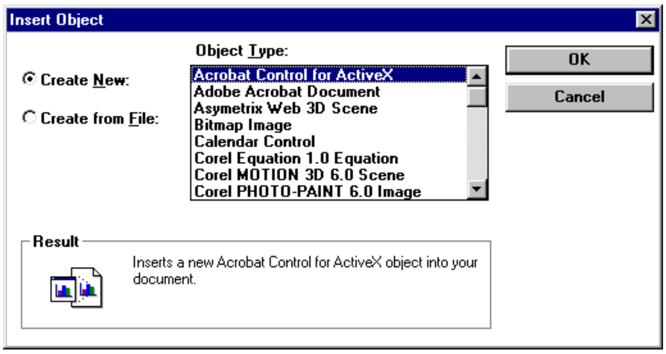


**Fig. 5-20:** Dialogue Box: “Insert Object” with activated “Create New” radio button

2. The “Create New” radio button will be activated. Do not deactivate it.
3. Select the application you would like to work with and click on “OK”.

   The OLE-application you have selected will open in the background – this may take a moment – and then a new blank document should appear:

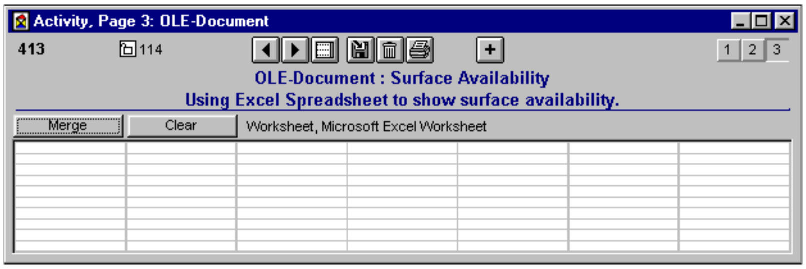


**Fig. 5-21:** Activity:OLE-Document Page (Blank MSExcel® Spreadsheet)

The type of document you have created is written in the space located to the right of the “Clear” button.

4. Double-click in the empty document space to view the application from which you created the OLE document.

   The application with the OLE document will move to the foreground (e.g. MSExcel®) and the PRIMO *Activity:OLE-Document page* will appear in the background. You may increase the size of the OLE application window to better suit your working requirements.

5. Use the OLE application in the usual way and to its fullest extent (including on-line help).

   Whenever you make a change to the OLE document, that change is transferred to the PRIMO *Activity:OLE-Document page* with a slight delay. While editing, the *Activity:OLE-Document page* will display a greyed-out cross-hatched area, indicating that the OLE-Document is activated in its OLE host application.

6. Once you having finished working on the OLE document, close it by selecting “Close” from the OLE application File menu, or by closing the OLE application itself. To go back to PRIMO, either select it from the Windows 95 Task Bar, or tab to it by typing ALT + Tab.

➔ **Tip:**
When working with certain OLE documents, it is not uncommon to have to use the menu command "Close" instead of the usual "Save" option. However, other menu commands, such as "Save as..." may also exist, depending upon the application.

When you switch back to PRIMO after closing the OLE document, you will notice that the word-processor document section of the *Activity:OLE-Document page* is no longer greyed-out and contains the OLE document you created.

7. Save and close the Activity record.

⚠ **Important:**
If the time your allocated time for working on an Activity record runs out, you must re-open the Activity record in order to save the OLE document you are working on. If you do not do this, when you close the OLE document, it will not be saved in PRIMO. When your allocated time is about to run out, PRIMO will alert you and if you are working on the OLE application at that time, you will be taken back to PRIMO so that you may click on the “time lock” icon to give yourself more time. To

go back to the OLE document, select it from the Windows 95 Task Bar or type ALT + Tab until you reach it.

## Turning an Existing Document into a PRIMO OLE Document

⚠ **Important:**
When you insert a new OLE-Document, the existing OLE-Document will be overwritten. To continue working on the existing document, see the section entitled "Modifying PRIMO OLE Documents" in this chapter, page 5-24.

✓ **Prerequisite:**
You have opened a new or existing Activity record. You have selected "OLE-Document" from the "Type" drop down list located on the *Activity:General Information page* (if an Activity type has not already been selected). You have entered a reference in the "Regarding" field and a remark in the "Remark" field for future reference. You are now on the *Activity:OLE-Document page*:

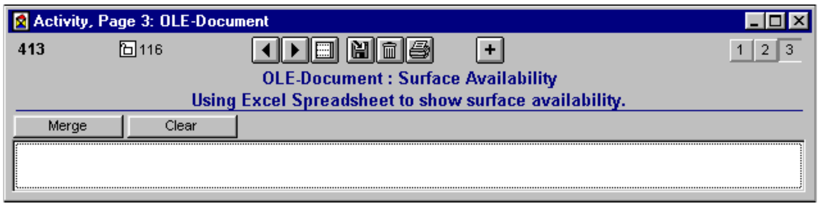


**Fig. 5-22:** Activity:OLE-Document Page (Blank)

1. Click on the "Merge" button.

   A dialogue box entitled "Insert Object" will open.

2. Select the option "Create from File".

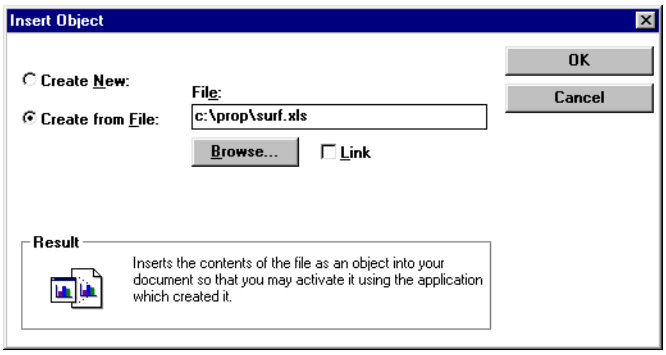


**Fig. 5-23:** Dialogue Box: "Insert Object" with activated "Create from File" radio button

3. In the field entitled "File", enter the file name and the file's location (drive, path...), or select "Browse" to look for the file.

   Selecting "Browse" will open a typical Windows file search dialogue box:

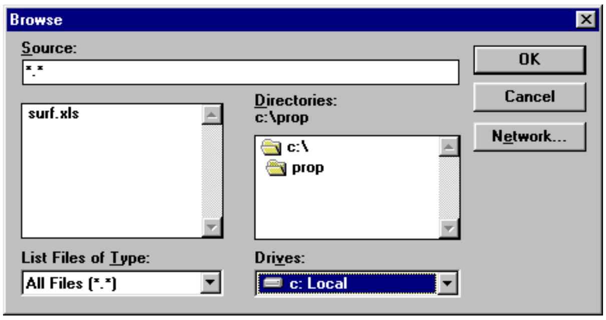


**Fig. 5-24:** Dialogue Box: “Browse“ for searching and opening files

If you choose to look for a file using the “Browse” option, the information regarding the file you select will automatically be inserted in the “File” field. Click on “OK” to close the “Browse” dialogue box.

4. Now that you have selected a file, close the “Insert Object“ dialogue box by clicking on “OK”.

   The file is inserted into the PRIMO word-processor on the *Activity:OLE-Document page*.

5. Save and close the Activity record (cf. Important notice at the end of the section entitled “Creating a New OLE Document“ in this chapter, page 5-21).

## Modifying PRIMO OLE Documents

✓ **Prerequisite:**
The “OLE-Document” Activity record that you wish to modify is opened to the *OLE-Document page*.

1. Open the OLE application by double-clicking on the OLE document.
2. Modify the OLE document then proceed as described in step No. 5 in the section entitled “Creating a New OLE Document“ in this chapter, page 5-21; be sure to observe the important notice at the end of this section.

## Example Using Excel to List Surface Break-down

If you need to list the surface break-down of a building (e.g. floor by floor), add an Activity record to the *Activities page* of the Property record in question. Next, select “OLE-Document” from the “Type” drop down list, enter a reference and a remark then go to the last page of the Activity record and open a new or saved MSExcel® spreadsheet:

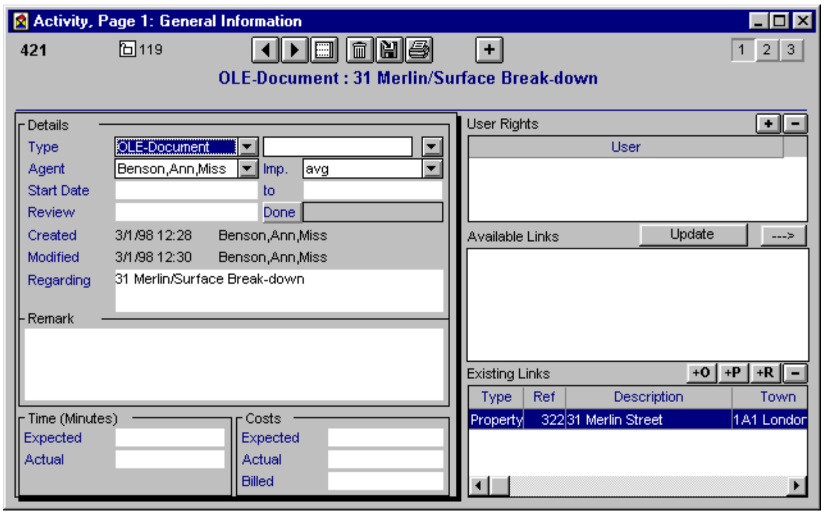


**Fig. 5-25:** Activity Record with an OLE Link to MSExcel® Created for a Property Record

The surface break-down could look as follows:

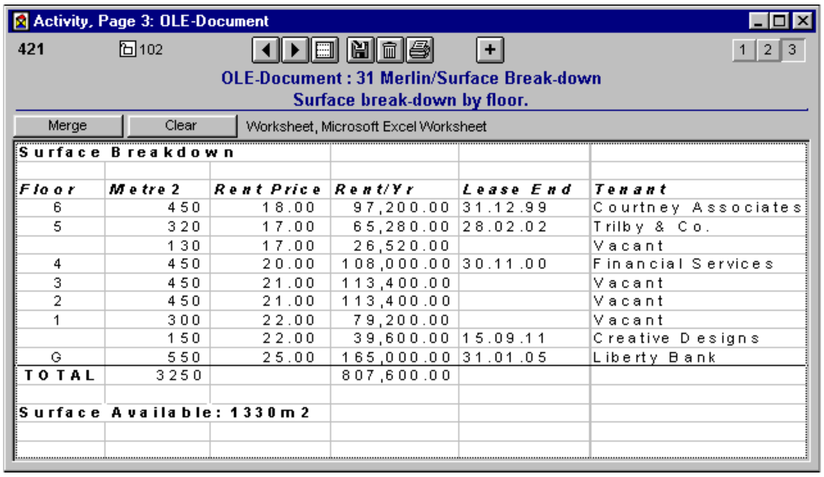


**Fig. 5-26:** OLE Example: Surface break-down Using MSExcel®

You can let MSExcel® calculate the Rent/Yr for each surface, as well as total surface and rent.

## Modification-Activities

Modification-Activities are nothing more than a way of generating a "history" for every record created, modified and deleted. For example, every time a Property, Organisation or Requirement record is modified, that modification can be recorded and a Modification-Activity generated. The PRIMO Program Administrator determines how and when Modification-Activities are generated. Although Modification-Activities are usually set up to be generated automatically, they can also be created manually if the Program Administrator has enabled the manual generation of this type of Activity.

A Modification-Activity can only be linked to the record it was generated from. It cannot be linked to more than one record. A Modification-Activity is usually automatically created when you save or delete a record. With the exception of the “Remark” field, no changes can be made to a Modification-Activity. Unless a Modification-Activity was created when you deleted a record, it can be viewed on the *Activities page* of the record it was generated from.

The Program Administrator determines how and when Modification-Activities are created. For detailed information on the subject see the section entitled “Modification-Activities“, Chapter 15, “Administration“, page 15-16.

## Viewing Modification-Activities

Modification-Activities are different from *"regular"* Activities both in their generation and structure. Therefore, they have their own Search and List window (cf. section entitled “Searching for Modification-Activity Records“, Chapter 1, “Basic Functions“, page 1-26).

Nevertheless, they too can be viewed from the *Activities page* of Organisation, Property and Requirement records they were generated for and can be opened from there. In order to view Modification-Activities listed on the *Activities page* of a record, click on the arrow icon located to the above right of the Activities list:

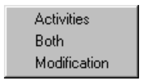


**Fig. 5-27:** Pop-up Menu for viewing Modification-Activities

The pop-up menu lets you decide whether you want to list "regular" Activities, Modification-Activities or both. If you choose "Modification-Activities" from the pop-up menu, your selection will be displayed in the area to the left of the pop-up menu and the *Activities page* will look as follows:

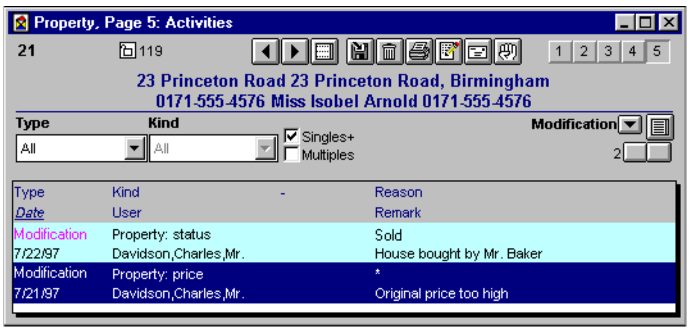


**Fig. 5-28:** List of Modification-Activities for Property Record No. 21

When you choose to view Modification-Activities only, certain functions pertinent to the *Activities page* are restricted as follows:

- The "**+**" icon enabling you to add an Activity to the *Activities page* is deactivated.
- The "**-**" icon enabling you to remove an Activity from the *Activities page* is deactivated.
- The "list" icon enabling you to transfer a list of *"regular"* Activities into an *Activity Search and List window* is deactivated.
- The filters located above the Activities list are not applicable.

You can open a Modification-Activity listed on the *Activities page* of a record by double-clicking on it, or by selecting it and then pressing on F2. A Modification-Activity record is structured differently from *"regular"* Activity records:

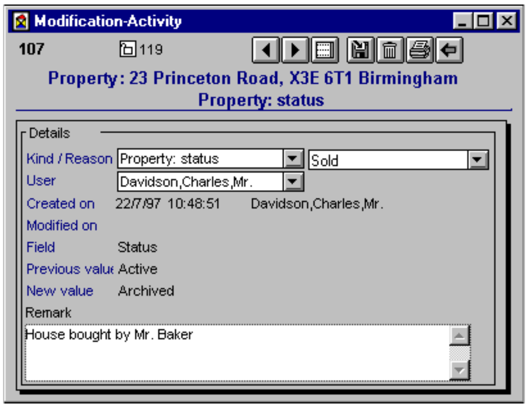


**Fig. 5-29:** Open Modification-Activity Record

Only the "Remark" field can be modified.

The Modification-Activity record toolbar is different to that of a *"regular"* Activity record:

- Clicking on the "list" icon will take you back to the *Activities page* of the record you opened the Modification-Activity from. It will not open a *Search and List window*.
- It is not possible to delete a Modification-Activity.
- Clicking on the last icon on the toolbar, the "arrow" icon, will take you to the record for which the Modification-Activity was generated.

## Generating Modification-Activities

Depending upon how the Program Administrator has set up the generation of Modification-Activities, a Modification-Activity can be generated whenever you create a record, whenever you delete a record and finally, whenever you make changes to certain fields (to be decided by the Program Administrator) within a record. If the Program Administrator has allowed it, you may also create Modification-Activities manually when necessary.

If required, PRIMO can create a Modification-Activity whenever a record is saved, and for that matter, one for each field that has been modified.

## Automatic Generation of Modification-Activities

➔ **Tip:**
When modifying surface and price information within a Property record, the Modification-Activities that are created refer only to information entered in the Data box of the Details section on the *Property:Data pag*e. Any changes brought to the Type/ Area box or the Attributes box are not taken into consideration.

If you modify a field for which a Modification-Activity is automatically generated, a "New Modification-Activity" window will open when you save the record (the "Kind" and "Reason" fields are already filled in):

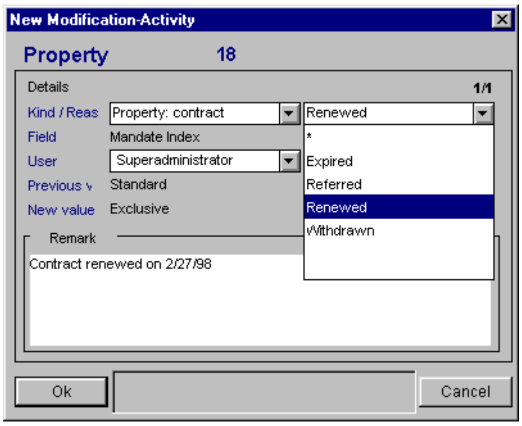


**Fig. 5-30:** Window: "New Modification-Activity"

Follow the same steps as before:

✓ **Prerequisite:**
You have saved the record you modified and a "New Modification-Activity" window is now open.

1. If the reason for the Modification-Activity entered by default is not correct, choose another reason from the "Reason" drop down list.
2. Enter a more detailed explanation of the modification in the "Remark" field.

   The Modification-Activity will already contain several vital pieces of information, including the type of record, whether it concerns the creation or deletion of the record, or in the case of a field modification, the previous and new value, as well as the date and name of the PRIMO user who worked on the record.
3. Click on "OK" to confirm the changes.

➔ **Tip:**
If you click on "Cancel" (instead of "OK"), you will not only be cancelling the creation of the Modification-Activity, you will be cancelling the save operation as well. The

record will remain as you left it, but PRIMO will not allow you to save your changes without generating a Modification-Activity.

### Generating Modification-Activities Manually

If the Program Administrator has enabled the option of generating Modification-Activities manually, you may do so whenever you wish to keep a record of a particular change you have made to a record.

To generate a Modification-Activity manually, follow the steps as described above:

✓ **Prerequisite:**
If the option to generate Modification-Activities manually has been enabled, then a hand icon should have been added to the record toolbar so that you can generate such an Activity as needed.

1. Click on the hand icon.

   A window entitled “New Modification-Activity” will open.

   The “Reason” field is left blank by PRIMO.

2. Select the reason that best suits your purpose from the “Reason” drop down list. If the choices shown do not suit you, select the “*****”.

3. Enter a more detailed explanation of the modification in the “Remark” field.

   When you create a Modification-Activity manually, only the record type, date, and PRIMO user fields are filled in for you. The reason for the modification, such whether you are creating, deleting or modifying a record and the values contained therein, must be typed into the Remark field.

4. Click on “OK”.

➔ **Tip:**
Clicking on “Cancel” will only cancel the generation of the Modification-Activity. The modifications you have made will be saved anyway.

## Activity Record Examples

The following examples demonstrate how Activities can be used.

There are no strict rules when it comes to using and working with Activity records. The examples that follow show just a few of the ways you can use Activity records. You may find other, just as useful and pertinent, ways to work with Activity records.

- A client contacts you by phone to express interest in a Property that you have offered to him/her:
  Create a “Contact-With client” Activity record.
- The client would like to see the Property plans before accepting the offer:
  Create a “ToDo-Send Info” Activity record.
- A visit of the Property has been arranged:
  Create a “Meeting-Visit” Activity record.

- The client has visited the Property:
  Create a “Meeting-Other” Activity record.

## Contact - With Client” Activity Record (Telephone Conversation)

A client contacts you by phone to express interest in a Property you have offered to him/her.

1. Open the client’s Requirement record and go the *Activities page* of that record. Click on the “**+**“ icon above the Activities list.

   PRIMO automatically selects “Misc.” from the “Type” drop down list, enters your name in the “Agent” field and enter the client’s name in the Existing Links section.
2. Make the following changes to the Activity record:

- Change the Activity type to “Contact”
- Change the Activity kind to “With client”
- In the “Regarding” field you could enter as a reference the date on which you offered the Property in question (e.g. 10/12/96)
- In the "Remark" field you could enter, for example, "Miss Jones called at 14.35 p.m. She would like to visit the Property at 31 Merlin Street and would like to see the plans beforehand. She asks that I call back with possible visit dates.”

➔ **Tip:**
Try to give complete information when entering data in the "Remark" field, since other PRIMO users will also be looking at this Activity record. You should also try to keep to a certain format when entering data (e.g. time of telephone conversation, contact's name, summary of conversation...).

3. Enter a review date in the "Review" field if you need to be reminded about this Activity at a later date, or if you wish to schedule a return call about the previous phone conversation, or regarding information you are sending the client.

The “Contact” Activity record described above could look like this:

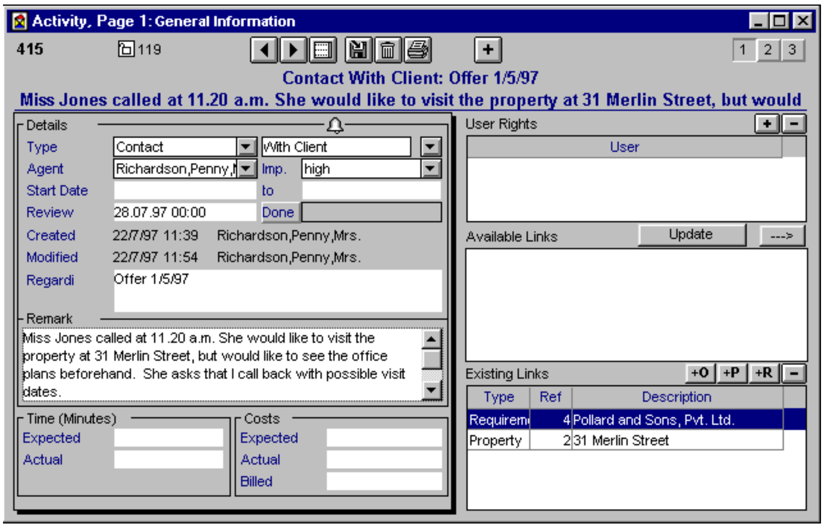


**Fig. 5-31:** Example: “Contact - With Client” Activity Record (Telephone Conversation)

## “ToDo - Send Info” Activity Record

Since the client has requested that you send him/her the Property plans, you should create a “ToDo” Activity to handle the tasks involved in sending the plans:

1. Open the Daily Planner and create a “ToDo” Activity record by clicking on the "**+**" icon located to the above right of the “ToDo” list.
2. Make the following adjustments to the new Activity record:

- Ascertain that the Activity type chosen by PRIMO is “ToDo“.
- Select “Send Info” from the “Kind” drop down list.
- In the “Regarding” field you could enter as a reference the date on which you offered the Property in question (e.g. 10/12/96)
- In the “Remark” field you could enter the following: “Send 31 Merlin Street plans to Mr. Pollard”.

3. Create an Existing Link between the Activity you have created and the appropriate Property and Requirement records.

The “ToDo” Activity record described above could look like this:

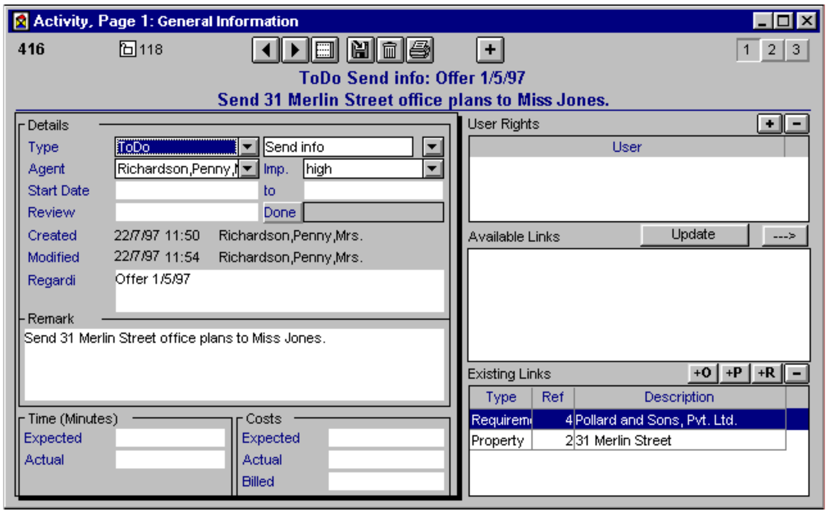


**Fig. 5-32:** Example: “To-Do - Send Info” Activity Record

You could designate this Activity to another PRIMO user. This could be useful, for example, if a secretary were responsible for mailing the Property plans to the client.

## “Misc. - Letter” Activity Record

You may wish to attach a letter to the Property plans you are sending to your client.

1. Open the client's Requirement record and click on the “letter” icon on the record toolbar.

   This immediately opens a new Activity record to the *Activity:Letter page* which contains PRIMO’s built-in word-processor.

2. To send a letter to your client, select his/her name from the "Contact" drop down list, select a layout from the "Layout" drop down list and once the layout is merged, finish typing your letter.

3. When you have completed the letter, go to *page 1* of the Activity record and adjust the entries in the following fields:

   Confirm that PRIMO has selected “Misc.“ from the “Type” drop down list and “Letter” from the “Kind” drop down list, and that your name is entered in the “Agent” field.

- In the “Regarding” field enter “Plans for 31 Merlin Street” as a reference.

➔ **Tip:**
If you have given your letter a reference, you can copy-paste this information into the “Regarding” field as well.

- In the "Remark" field enter keywords about the content and the purpose of the letter. For example, "Letter to explaining office layout, Plan # 3, for 31 Merlin Street. Letter must be mailed with plans".

4. Enter a “Review” date for a time when you know Mr. Pollard will have received the documents you have sent him. This will allow you to review the documents with him and set a date to visit the Property in question.

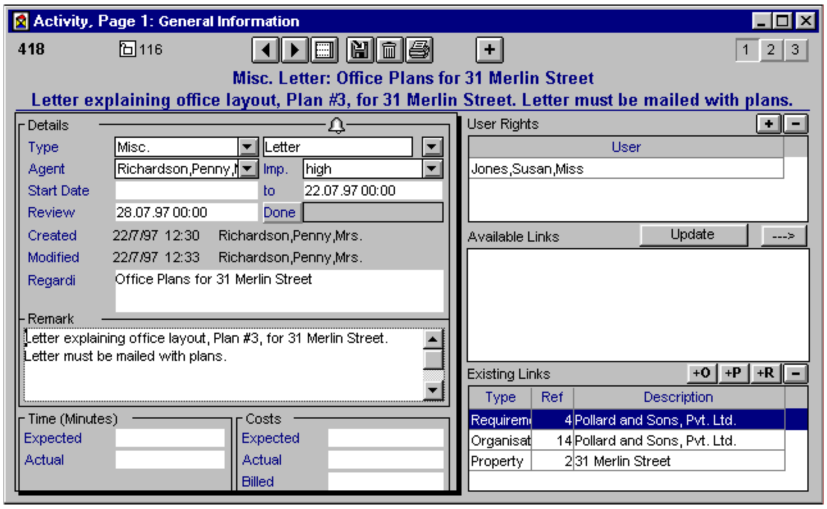

**Fig. 5-33:** Example: “Misc. - Letter” Activity Record

## “Meeting - Visit” Activity Record

A date to visit the Property has been set. You should enter that date into PRIMO:

1. Open the Daily Planner.
2. Click on the “**+**“ icon above the Meeting list to create a new “Meeting” Activity record.

   PRIMO will select “Meeting” from the “Type” drop down list and will enter your name in the “Agent” field.
3. Adjust the following Activity record fields:

- From the “Kind” drop down list select “Visit“,
- Enter start date, end date and times in the “Start date - to” fields,
- Enter a review date in the “Review” field, if necessary,
- In the "Regarding" field enter the following as a reference: "Visit of 31 Merlin Street/ Mr. Pollard",
- In the “Remark” field make a note of the meeting place: “Meet Mr. Pollard at entrance of building. Key will be with security guard”,
- If necessary, enter the expected time and cost of the visit in the “Time” and “Cost” fields,
- Create Existing Links between the Activity record and the pertinent Requirement and Property records.

The “Meeting” Activity record described above could look like this:

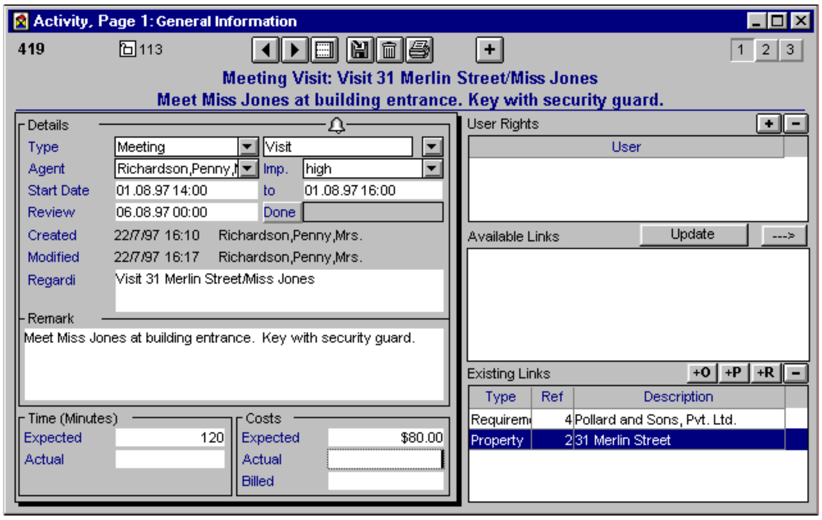


**Fig. 5-34:** Example: “Meeting - Visit” Activity Record

## “Contact - With Client” Activity Record (Property Visit Report)

You have visited the property with the client. You should now write up your report of the visit as well as any comments your client may have.

1. Open the client’s Requirement record and go to the *Activities page* of that record. Create a new Activity record by clicking on the “**+**“ icon located above the Activities list.
2. Fill in the fields as follows:

- Select “Contact” from the “Type” drop down list,
- Select “With client” from the “Kind” drop down list,
- Enter the date and time of the meeting in the “Start date - to” fields,
- Enter a reminder date in the “Review” field if necessary,
- In the “Regarding” field enter as a reference, “Report of visit to 31 Merlin Street“,
- In the "Remark" field type your report of the visit: "The office space and layout seem to please Mr. Pollard. However, he would like us to discuss the following upgrades with landlord: one of the offices is to be converted into an office kitchen, he needs ISDN and LAN wiring."

The “Contact” Activity record described above could look like this:

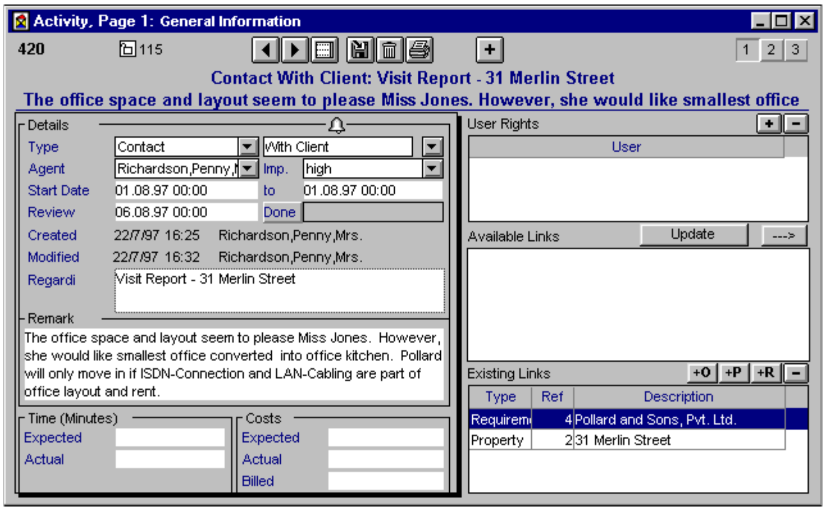


**Fig. 5-35:** Example: “Contact - With Client” Activity Record (Property Visit Report)