Accessing Activity Center Access

How do I access Activity Center?

Activity Center is accessed through the drawer on the right hand side of the Console and Relationship Profile screens where it is easily accessible for you to manage your day-to-day activities. You are provided a list of all activities based on:

- Overdue status
- Activities that are due today
- Activities that are scheduled in the future

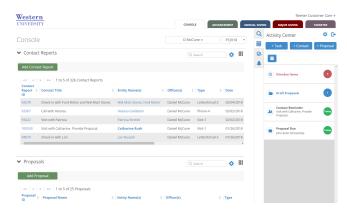
You may click on any of the items listed and you will be taken directly to the contact report, proposal or task for review and completion.

How do I change my view to see activities in the future and the types of activities?

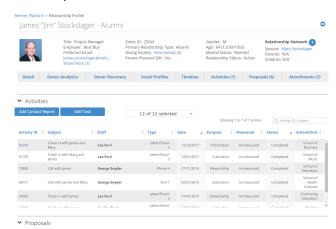
You can personalize your view of which activities are visible by clicking on the filter icon in the drawer. You may select and change which activities are presented in the drawer at any time to fit your daily workflow and priorities.

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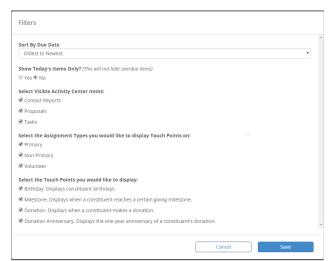
Console



Relationship Profile



View of Activities / Filtering



Calendar View



Where do I find a calendar view of my past, current and future activities?

A calendar view can be accessed in the drawer, where you will see a calendar icon. Click on the icon to view your activities on the calendar. You are able to filter your view by month, week or day.

How do I set up the calendar feed?

Set up for the calendar feed is found on the calendar view. Set up instructions are provided when you click on the Calendar Feed button.