

4. How to Create an Action

The **Actions** module is where you log every client interaction—notes, calls, comments, etc.—across all your projects. This guide walks you through each click, field, and next step, so even brand-new users can follow along confidently.

1. Open the Actions Module

1. **Locate the left navigation bar** on your screen.
2. **Find the “Actions” icon** (it looks like a small calendar with a check-mark).
3. **Click “Actions.”**
4. The main **Actions** table will load on the right.



2. Understand the Actions Table

At the top you’ll see controls:

Filter (funnel icon)

Search... (text box)

Below is the table header row:

Column	What It Shows
Action date	When the action occurred (sortable)
UID	Unique, auto-incremented ID (ca000001)
Type	Category (Note, Call, Comment)
Subtype	Secondary category (if enabled)
Client	Which client this action is for
Project	Which project the client belongs to
Creator	Who logged the action
Responsible	Who will follow up
Created at	When the record was created
Updated at	Last edited timestamp
Text	The body of your note/comment
Actions	Edit  or Delete  controls



Tip: Click any column header (e.g. UID or Created at) to sort ascending/descending.

3. Add a New Action

3.1. Open the Add Form:

Click the **+** **Add** button in the **top-right corner**.

A panel slides in from the right titled **Add action**.

3.2. Fill in the Fields

Field	Where to Look	What to Enter
Client	Top of form, first dropdown	Start typing client name; select from the autocomplete list.
Type	Directly under Client	Choose Note , Call , or Comment .
Subtype	Under Type (if your Type has subtypes)	Choose the relevant subtype (e.g., "Follow-up" under Call).
Text	Large multiline box	Enter your note, call summary, or comment details.
Responsible	Below Text	Begin typing an employee's name; select from the list.
Action date	Above the footer buttons	Pick the date/time the interaction actually happened, or leave blank for "no date."
Project	(If shown) Under Responsible	Pick the project if you have multiple projects active.

“ Note:

UID is generated automatically when you click **Save**.

If **Subtype** doesn't appear, your admin must configure Subtypes under **Configurations** → **Actions** → **Subtypes**.

3.3. Save Your Action:

Click the **Save** button at the bottom.

The panel closes and you're returned to the table.

Your new action appears at the top (sorted by **Created at**).

4. Verify & Manage Your New Action

Locate it by its **UID** or the **client's name** via the **Search...** box.

Filter by Type, Subtype, Responsible, or date using the **Filter** drawer:

1. Click the funnel icon.

2. Tick the fields you want to filter (e.g. “Type = Call” and “Responsible = Alice”).
3. Click **Apply**.

Edit: Hover over the row, click the  icon in the **Actions** column to update any details.

Delete: Click the  icon to remove an action (you’ll see a confirmation prompt).

5. Troubleshooting Tips

“Invalid Date”? Make sure you pick a valid **Action date** or leave it blank—don’t enter text.

No Subtype list? Ask your admin to add Subtypes under **Configurations → Actions**.

Responsible field empty? Ensure you have at least one Employee created under **Employees**.

Congratulations! You’ve successfully logged an action. Repeat these steps for each client interaction to build a complete, searchable history of all your work.

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