Creating an activity

Using the Healthwatch CiviCRM

About this resource

One of the many benefits of CiviCRM is its ability to help you keep track of your contact with individuals and organisations by using the Activity function.

The CiviCRM comes with a number of activities as standard including:

- Meeting
- Outbound phone call
- Engagement/outreach

This resource is for users with administrator permissions to explain how to create and configure new activity types for your Healthwatch, with custom fields if you require them.

Creating a new activity

First, click on the 'Record new activity' link on the menu on the left-hand side. A new screen should appear.

- Your name will automatically be prefilled into the 'Added By' field.

- In the 'With Contact' field you need to include who you held the meeting with, or who you called. You can enter more than one name in here.

- If you want to assign the activity to another member of the team, put their name into the 'Assigned to' field. They will will automatically receive a copy of the activity via email. The activity will also appear on your contact summary record as the person who added it, and on the record of the person it was assigned to for their viewing.

- Subject and location are optional fields; but make sure you include all information that you think is useful and relevant.

- You need to include the date of the activity. This should be the date the activity took place, not the date that you are recording it (if they differ). The time is optional, but it will default to the current time if it is not set.

- Depending on the type of activity you select, you will find that different options appear. For example, if you choose 'Meeting' as your activity type, the extra fields Meeting Details will appear:

This comes with a standard custom field: however, your team's CRM administrator will be able to edit these options by clicking on the spanner next to the field. This will bring up a list of the options available with the choice to add new options, edit existing options, or disable or delete options.

Each activity type has different custom fields, for example, Engagement/Outreach allows you to put the address of the event and the number of people engaged with.

- When you have finished entering all the information, press 'Save' and it will appear as below on the contact summary record. The main aspects of the activity are summarised here. You can see the full details by clicking 'View'. You can also edit it after you have saved it, by clicking 'Edit'.

Bulk actions

There will be times where you may want to record an activity against a group of contacts, for example, if you had a meeting with multiple attendees.

Rather than recording these actions separately, you can do this all at once time.

Once you have your list of contacts, select the ones you want and go to the 'Actions' bar at the top of the list.

There are several different functions in the actions bar, some of them available for bulk action only, and others could be put on individually but adding them by bulk can save time.

If you are looking for activities that you use on individual contacts, then select the action 'Record Activity for Contacts' and you will be able to select another activity to add to these contacts.

Try it for yourself

- Record a meeting as an activity. Add details in the extra fields that appear when you choose meeting. Assign it to a colleague, when they receive an email for this activity have you put enough detail in the activity for them to action?

- Using a recent meeting, or event, add people who attended that meeting to a new group.

- Using bulk actions, now record a new activity for all these contacts.