

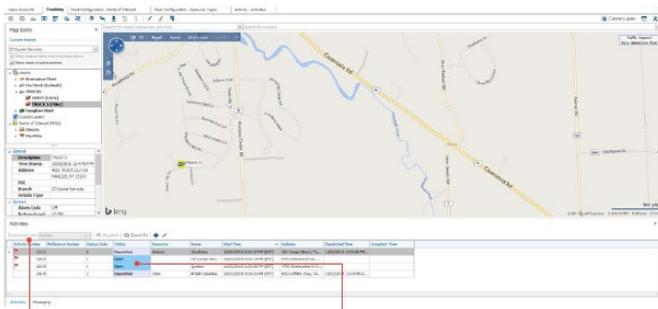
## Working with Activities

### ABOUT ACTIVITIES

The Activities module in Fleet Complete is applicable if you have the **Resource Tracker** or the **Garmin Integrated** mobile solutions. Activities are tasks, like a service call, that need to be done at a specific location, assigned to a resource, and then monitored in terms of their progress

### ACCESSING ACTIVITIES

Activities can be accessed in different areas of the Fleet Complete application, beginning with the **Tracking** screen.



In the Activities panel location below the map, you can create and monitor the progress of the incomplete activities.

Those Activities that are completed disappear from this panel.

The Status column displays different colors based on Status type:

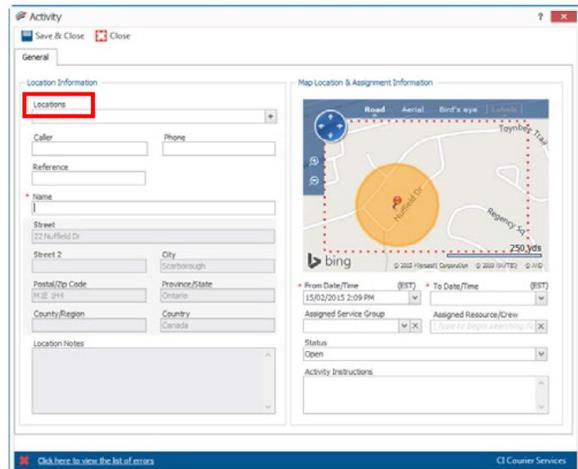
- Blue = Open
- Green = Accepted
- Purple = Dispatched
- Red = Rejected

### CREATING AN ACTIVITY

To create an Activity from the **Tracking** screen, follow these steps:

**1.** From the **Activities** panel below the map, click the **+** icon from the toolbar.

**2.** In the **Locations** field, type in the first few characters of the POI you want to use as the destination.



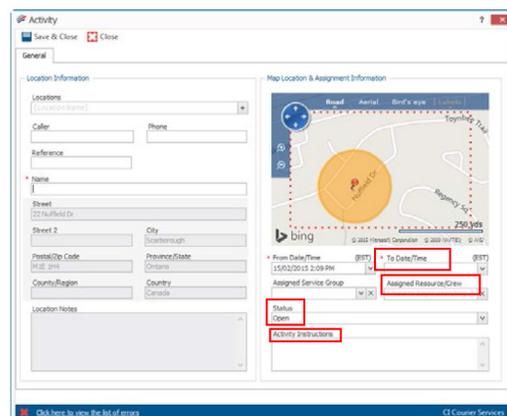
**3.** If the address does not relate to a POI, click the **+** to the right of the Locations field and complete the address fields as required.

**4.** In the **To Date/Time** field, select the date the Activity is to be completed by.

**5.** In the **Assigned Resource/Crew** field, select the Resource to perform the task.

\*\*\*Once a Resource is assigned to an Activity, the **Status** field will automatically change from *Open* to *Dispatched*. So, leave the *Assigned Resource/Crew* field blank if you only want to dispatch the Activity at a later date.

**6.** In the **Activities Instructions** field, you can enter helpful instructions for the Resource as required.



## WORKING IN THE BOOKING SCREEN

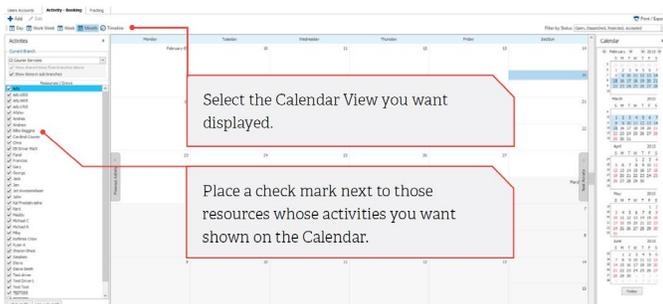
The Booking screen allows a dispatcher to have access to a Calendar to help plan their activities.

1. From the main toolbar, click the **Activities** icon and then **Booking**.



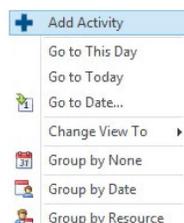
2. The Booking screen appears displaying:

- A **Resources** panel to the left, listing the Resources logged in to their mobile devices.
- A **Calendar**, showing by default the monthly calendar view. This can be changed by using the day, work week, week, month, or timeline buttons, located on the top left corner of the screen.
- A **Monthly Calendar** panel to the right with the current and next four months, with holidays marked.



2. To create an Activity from the **Booking** screen, right-click on the day you want to schedule an Activity.

3. From the contextual menu, click the **Add Activity** option from the list.

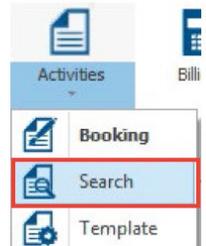


4. Complete the details of the Activity as explained in the previous section '**Creating an Activity**'.

## WORKING IN THE SEARCH SCREEN

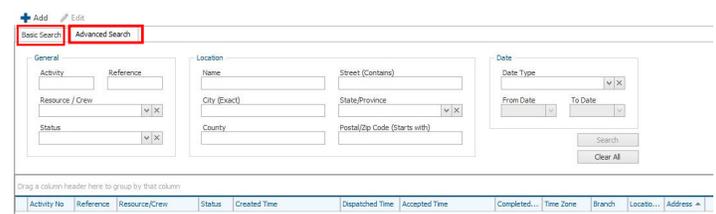
The **Search** screen allows a dispatcher to search and review existing Activities based on specified criteria in a list format.

1. From the main toolbar, click the **Activities** menu and then **Search**.



2. Use the **Basic Search** tab to search based on a *single* criterion (Activity#, Reference, Location (POI), Assigned Resource/Crew).

3. Use the **Advanced Search** tab to retrieve Activities based on multiple criteria available in the top panel. NOTE: Multiple criteria are cumulative (this AND that AND the other).



## TO LEARN MORE ABOUT ACTIVITIES

To learn more about **Activities**, click the  button from the **Quick Access** toolbar located in the top left hand corner of the application and perform a keyword search.