Working with Contract Activities

Contracts User Guide · https://evergreenworx.com/docs/working-with-contract-activities/

Activities play a vital role in managing and tracking interactions, follow-ups, and documentation throughout the contract lifecycle. In EvergreenWorx Contracts, we leverage the **built-in Activities functionality in Dataverse**, allowing users to log and manage communications, tasks, and appointments directly from a contract record.

This article explains how to work with activities in the context of a contract, the types of activities supported, and how to view and manage them efficiently.

Accessing Activities on a Contract

There are two primary ways to view and manage activities for a specific contract:

1. **Timeline on the Summary Tab**
   - Located on the main contract form’s Summary tab.
   - Provides a real-time, chronological view of all activity types and notes.
   - Allows you to quickly create or view tasks, emails, appointments, and more.
2. **Activities Tab**
   - A dedicated tab on the contract record.
   - Offers a more focused and structured view of all associated activities.
   - Ideal for filtering or analyzing historical engagement with the contract.

Supported Activity Types

EvergreenWorx Contracts supports all standard activity types in Dataverse, including:

- **Task**: Use for internal reminders or action items such as "Review draft contract" or "Schedule negotiation meeting."
- **Phone Call**: Log important conversations with stakeholders or vendors.

- **Email**: Send or track contract-related emails directly from the timeline.
- **Appointment**: Schedule meetings related to negotiations, signings, or contract reviews.

These activities can be linked directly to the contract record, ensuring context is preserved and nothing falls through the cracks.

Global Activities View

You can also view all of your assigned activities across the system:

- Navigate to **Activities** in the sitemap.
- This view aggregates all open and completed activities tied to any record you're associated with—including Contracts, Accounts, and more.
- Use filters to focus on specific due dates, activity types, or related entities.

Benefits of Using Activities with Contracts

- **Centralized Communication**: Keep all stakeholder interactions linked to the relevant contract.
- **Task Management**: Assign deadlines, owners, and priorities for contract-related actions.
- **Audit Trail**: Maintain a clear historical record of actions taken and communications sent.
- **Collaboration**: Help teams stay aligned with reminders and notes easily visible to all users.

Best Practices

- Use the Timeline for daily visibility and lightweight interactions.
- Use the Activities tab for managing multiple activities or filtering by type.
- Encourage teams to log important decisions and actions to support compliance and visibility.
- Leverage reminders and due dates to stay ahead of key contract milestones.

By using activities effectively, EvergreenWorx Contracts becomes more than a repository—it becomes a hub for contract execution and collaboration.