Each activity recorded in the Customer/Vendor Relations Management system will be tied to a Task. Tasks are the top-level designations for interactions with customers or vendors. You can create new Tasks by going to Admin -> Setup - Admin -> Tasks. When the add-on is first activated two Tasks will be automatically created in your default company. One Task will be for AP/Vendors and another will be for AR/Customers. You can assign your users to Tasks with the Assign Users and Assign User Groups boxes. You can also designate that customers or vendors will be automatically assigned to your users in case you want them to work from a designated list of contacts. Click the Auto Assign Contacts check box. You can set filter options for how the contacts will be selected below in the Filters section (by Postal Code range, custom field, etc.). If you click the Contacts Are Exclusive box then multiple users won't be able to add activity for the same customer or vendor under the same Task.

You can add and edit Task Statuses by going to Admin -> Setup - Admin -> Task Statuses.

You can add and edit Task Actions by going to Admin -> Setup - Admin -> Task Actions.

Add new activity and keep track of past activity by going to Contacts -> Tasks.

You can also access the customer or vendor activity when on the customer or vendor edit page by clicking the Activity tab. On that tab you will see Activity history for the contact along with a link at the top to add new Activity.

Users can view upcoming Next Actions by going to Contacts -> Tasks. The list is now sorted so that upcoming Next Actions are at the top of the list. Any missed Next Actions will now be highlighted in red. There are two new checkbox options too called Show All Recent & Upcoming Next Actions along with Include All Missed Next Actions. When these options are checked recent, upcoming and missed actions will show even if they don't match the other report filters. This is to give users a view that will keep Next Actions from falling through the cracks. When unchecked the report filters work as normal and recent, upcoming and missed actions will only show if they match the current report filters.

On the Activity tab on vendor and customer edit pages there are new links above the Activity History list labeled All Activity For Customer and Just CRM Activity. To ignore orders, invoices and payments click the Just CRM Activity link.