3.3 Solution

Solution

New Activity Pattern [Up to Activity Patterns]

Short Subject		Target Days	30
Automated Only	* ○ Yes ● No	Target Hours	
Description		Category	Reminder ▼
Escalation Days	40	Activity Class	* Task ▼
Escalation Hours		Escalation Start Point	Activity creation date ▼
Mandatory	* ○ Yes ● No	Target Start Point	Activity creation date ▼
Code	* InspectVehicles_Ext	Escalation Include Days	Business days ▼
Recurring	* ○ Yes ● No	Target Include Days	Business days ▼
Subject	* Inspect Vehicles	**Templates**	
Priority	Normal ▼	Document Template	🔍 ⊗
Type	* General ▼	Email Template	🔍 ⊗
Pattern Level	* All ▼		

3.4 References

3.4.1 Activity pattern

Activity Patterns are templates that standardize how activities are generated.

Activity patterns are typically created and modified by administrators on the page **Administration tab →
Business Settings → Activity Patterns**.

1. **To create a new activity pattern, click the New Activity Pattern button**

   The Code field is a unique internal name for the pattern and is used to reference an activity pattern in Gosu

2. **To edit an existing activity pattern, click the name of the activity pattern in the list**

   Changes to an activity pattern affect only activities from that point forward

Find

Please refer to the *PolicyCenter Application Guide* for the definitions of each field of the Activity Pattern.

3.4.2 Create an activity in Gosu

1. Retrieve an activity pattern by its pattern code

```
ActivityPattern.finder.getActivityPatternByCode("pattern_code")
```

2. Create an activity related to an Account, a Policy or a Job

a) create an activity related to an Account

```
activityPattern.createAccountActivity(bundle, activityPattern, Account, subject,
description, approvalIssue, priority, mandatory, targetDate, escalationDate)
```

or

```
account.newActivity(activityPattern)
```

b) create an activity related to a Policy

```
activityPattern.createPolicyActivity(bundle, policy, subject, description,
approvalIssue, priority, mandatory, targetDate, escalationDate)
```

c) create an activity related to a Job

```
activityPattern.createJobActivity(bundle, job, subject, description, approvalIssue,
priority, mandatory, targetDate, escalationDate)
```

3. After creating the activity in Gosu, the next step is normally to assign it to a user or a queue.

The activity assignment is discussed in the next lesson.

Stop