ERM User Manual

How to schedule an activity? What is Schedule an Activity?

Don't get confused with doing a **Schedule Activity** and a **Follow UP Activity**.

A **Schedule Activity** is used mostly when you are creating a brand new activity for a new customer or for a new action. 99% of the time you will have cleared an activity or you would have sent a history. If you are doing this then you would be doing a Follow up Activity Click on click to go to **Follow up Activity**. **Schedule Activity** can be found in the menu **Customer.**

HOW TO SCHEDULE AN ACTIVITY:

1. Search for the customer using the **View Customer List** or **Search / Lookup a Customer**

2. To Schedule an Activity it is similar to Follow Up Activity.

3. Select the Activity Type for the follow up activity by selecting one of the options in the Activity Type Field. IMPORTANT: Do not use Marketing Call unless you are in the marketing team.

4. Check that the customer name is correct in the **Schedule this Activity For**. This field is the name of the customer you want to do the follow up activity is. If it is wrong click in the field and type in the correct customer name you want to schedule it for.

5. Select the **Start Date**. This is the date you want to schedule the activity for.

6. If you want to make it a timeless activity (meaning anytime of the day) click on this check-box.

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7. If you want to follow up the activity at a specific time, make sure the **Timeless Start** check-box is unticked and enter the time in 24-hour clock in the Time field.

8. Choose **Duration** for the activity. Most of the time it should be 5 minutes. Remember that this sets your day, so if you make a duration 30 minutes you will get alot of notices when scheduling activities that the time is not available. There are only so many 30 minute time slots in day's work.

9. Click on

   if you want to be reminded of an activity.

10. Do not do anything for **End Date** and **End Time.**

11. Select your Priority level. This field helps remind you of the importance of an activity.

12. You can color code your activities to help identify the important ones. You can select if you want any one of the colors.

13. The

    field remembers the most common subject matters. This does not have to be used, but is available to save you from having to type the same thing over and over and over again. IMPORTANT: The system automatically decides what is saved as a pre-set and what is not by the number of times it is used. You cannot save your own.

14. Enter a brief description in the

    field. This should be brief, but easy to understand.

15. When you do a follow up, the system will automatically remember the last history note and show it in the **Details** box. When you do a follow up, leave the text in the **Details** box so you know what the last history note was.

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16. In the

    field leave the name for you, if you are scheduling the follow for you or find the correct staff member if you are scheduling it for someone else.

17. Check the Recurrence is on **Once**.

18. When ready and you have checked everything click on
    button.

Attached files:

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