Activities

How to clear an activity from the View Activities / Task List?

HOW TO CLEAR AN ACTIVITY FROM THE VIEW ACTIVITIES / TASK LIST:

In the View Activity / Task List, you will be able to clear an activity.

IMPORTANT: Always click on Clear Activity button before you call customer.

button.Â This will open a new page called Clear Activity.

2. Read customer's history briefly, check past orders and get idea of customer.

3. Use Iconic Phone System and call customer.

4. As you speak to customer, enter detail notes for history record on customer account.
   IMPORTANT: If you need to open new menu or different page, right click on menu and click open in new tab.Â This will allow you to still view Clear Activity page.

1. To clear an activity click on the
   1. To know what you should write in the details box when clearing a history click here for the steps and procedures of what to write in your details box of history.
5. After entering all details in Details Box.Â Select your result and choose best option for

   Results may be different to ones shown above.

6. Select what you would like to do next.Â If you need to send email, select

   button IMPORTANT: When clicking on **SEND EMAIL** button the clear activity page will remain open until you send email.Â Then go back to clear activity page and clear activity.
   For more information on **SEND EMAIL** click here on how to **SEND EMAIL**.

7. If you do not need to SEND EMAIL but which to finish clear activity click on
   Â button

8. This will give you two options.Â
   1. Option one is to create a follow up for customer.Â 99% of the times you will create a follow up for the customer or activity.Â To do this click on the button that says

      This will open up a new page for you to create a follow up activity.Â Refer to Follow Up Activity for information on how to fill complete a follow up activity.

   2. Option two is to save a history record and not create a follow up.Â This is rarely used, but the option is available.Â To do this click on the button that says

      If you accidentally click on the button that says this, but didn't mean to, you can always schedule a new activity for the customer.Â Refer to Schedule New Activity.

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Activities

Questions Asked and Answered:

1. David Phillip | 05-May-2020 02:12 |
   Question: Under what circumstances would an event manager want to clear an activity?
   1. answered by @barbara.green | 06-May-2020 14:09 |
      1. when he/she has completed the activity they are working on.

Attached files:

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