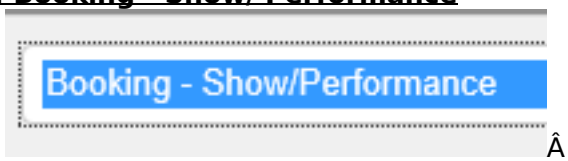
Activities

What Activity Type should I choose for a follow up or schedule?

The activity type you choose during a **Follow Up** or when you select **Schedule an Activity** from the Customer menu or if you press the 

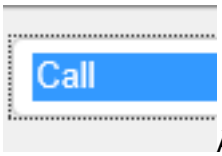
Â button should be based on exactly what you are going to do in that follow up or schedule activity.Â Remember that the activity type is a brief one or two word description of exactly what you need to do for that specific activity for that specific customer.

ACTIVITY TYPE: Booking - Show/ Performance

The activity type 

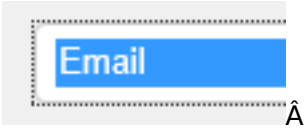
Â is used mostly by the events department and accounts team when a show has been booked.Â It can be used by the **SALES TEAM** to notify when when you are going to close the deal or about to book a show with a customer and need to schedule an activity to remind you that this customer is going to book the show.Â IMPORTANT: this is mostly used by the events department or accounts staff mostly.

ACTIVITY TYPE: Call

The activity type 

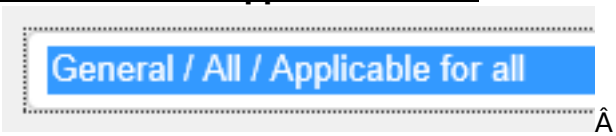
Â is mostly used by the **SALES TEAM** and used when the follow up or schedule is to inform or remind you to call the customer.

ACTIVITY TYPE: Email

The activity typeÂ 

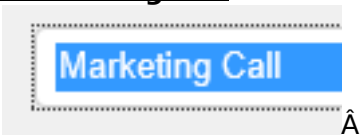
Â is used to inform you or remind you to send an email.

ACTIVITY TYPE: General / All / Applicable for all

The activity type 

Â is generic and is used when the follow up or schedule is not specific to any on of the other types.Â This is mostly used by the system or support team.

ACTIVITY TYPE: Marketing Call

The activity type 

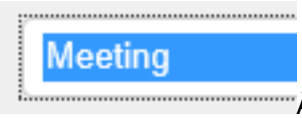
Â is only used by the **MARKET TEAM**.Â You can use this as the type if you are going to schedule an activity for the MARKETING TEAM, but this should not be used when referring to calling a customer or a call back to a customer.

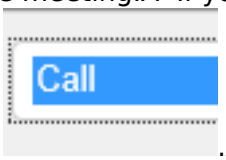
ACTIVITY TYPE: Meeting

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URL: https://staff.iconic.productions/KB/content/0cat=37/156/en/what-activity-type-should-i-choose-for-a-follow-up-or-schedule.html

Activities

The activity type 

Â is used when you are followup or scheduling an actual meeting.Â This refers to a face to face meeting.Â If you are going to call a customer to make a meeting, than select the activity type 

.Â Meeting Activity types are specific for meeting face to face or Skype / Video Conferencing Meetings.

ACTIVITY TYPE: To-do

The Activity type 

Â is used when you have to do something, that is not one of the other types.Â Things like having to speak to an event manager.Â Or check customer history.Â Or check event calendar booking etc.Â Remember it is more about things you have to-do with regards to the customer.

ACTIVITY TYPE: Website Form

The Activity type 

Â is used mostly by the **RECEPTION** and **ADMINISTRATION TEAM**.Â Â This is used when a website form has been completed by a customer and received by the our receptionist or an Workshop enquiry has been competed etc.Â

Attached files:

Unique solution ID: #1155
Author: n/a
Last update: 03-Feb-2016 01:43

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