

Activities

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

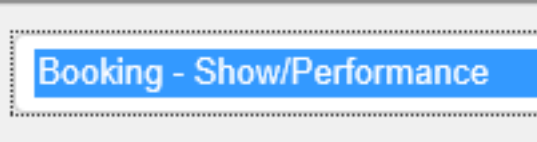
The activity type you choose during a [Follow Up](#) or when you select [Schedule an Activity](#) from the Customer menu or if you press the

A blue rectangular button with the word "Schedule" in white text.

^ A button should be based on exactly what you are going to do in that follow up or schedule activity.^ 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

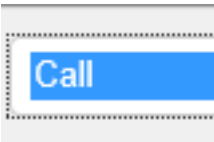
The activity type

A blue rectangular button with the text "Booking - Show/Performance" in white text.

^ It is used mostly by the events department and accounts team when a show has been booked.^ 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.^ **IMPORTANT: this is mostly used by the events department or accounts staff mostly.**

ACTIVITY TYPE: Call

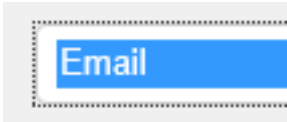
The activity type

A blue rectangular button with the word "Call" in white text.

^ It 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

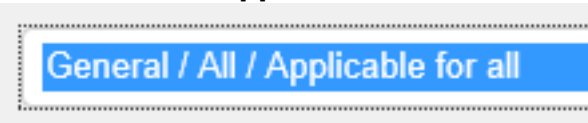
The activity type^

A blue rectangular button with the word "Email" in white text.

^ It is used to inform you or remind you to send an email.

ACTIVITY TYPE: General / All / Applicable for all

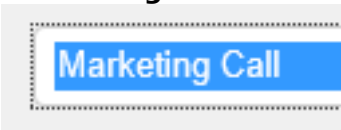
The activity type

A blue rectangular button with the text "General / All / Applicable for all" in white text.

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

ACTIVITY TYPE: Marketing Call

The activity type

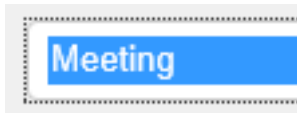
A blue rectangular button with the text "Marketing Call" in white text.

^ It is **only used** by the **MARKET TEAM**.^ 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.

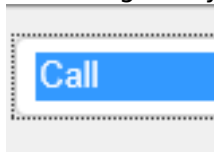
ACTIVITY TYPE: Meeting

Activities

The activity type



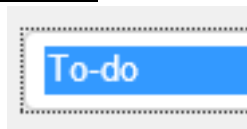
^ is used when you are followup or scheduling an actual meeting.^ This refers to a face to face meeting.^ If you are going to call a customer to make a meeting, than select the activity type



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

ACTIVITY TYPE: To-do

The Activity type



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

ACTIVITY TYPE: Website Form

The Activity type



^ is used mostly by the **RECEPTION** and **ADMINISTRATION TEAM**.^ ^ 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.^

Attached files:

Unique solution ID: #1155

Author: n/a

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