Emails and Sending Emails

How to do a follow up activity?

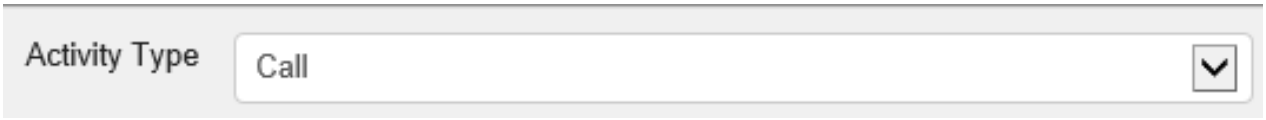
Don't get confused with doing a **Follow UP Activity** and a **Schedule Activity**.

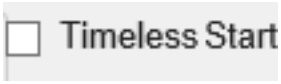
A **Follow up Activity** occurs when you have cleared an activity, created a history note or sent an email.Â Where as a **Schedule Activity** is a new activity that you create for a customer.Â **Schedule Activity** can be found in the menu **Customer.**

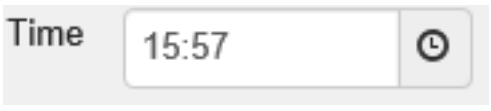
To create a **Follow Up Activity** you would have click on 

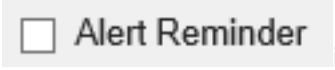
Â button or the button that says 

.Â When you click on one of these buttons a new page will open.Â To create a **follow up** do the following:

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

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2. Check that the customer name is correct in the **Schedule this Activity For**.Â This field is the name of the customer you want to do the follow up activity is.Â If it is wrong click in the field and type in the correct customer name you want to schedule it for.
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3. Select the **Start Date**.Â This is the date you want to schedule the activity for.
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4. If you want to make it a timeless activity (meaning anytime of the day) click on this check-box.
   

5. 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.
   

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6. Choose **Duration** for the activity.Â Most of the time it should be 5 minutes.Â 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.Â There are only so many 30 minute time slots in day's work.
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7. Click on 

if you want to be reminded of an activity.
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8. Do not do anything for **End Date** and **End Time.**

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

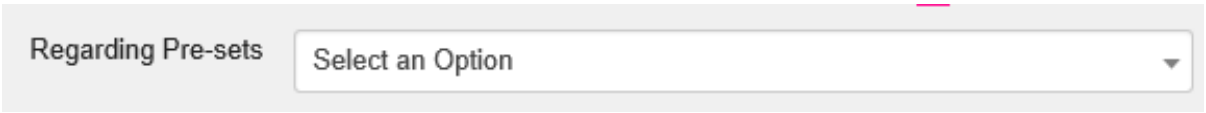
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10. You can color code your activities to help identify the important ones.Â You can select if you want any one of the colors.



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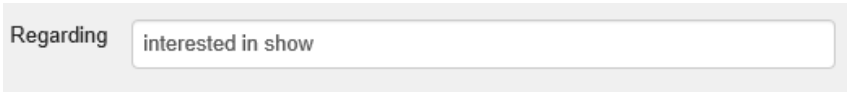
11. The



Â field remembers the most common subject matters.Â 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.Â IMPORTANT: The system automatically decides what is saved as a pre-set and what is not by the number of times it is used.Â You cannot save your own.

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12. Enter a brief description in the



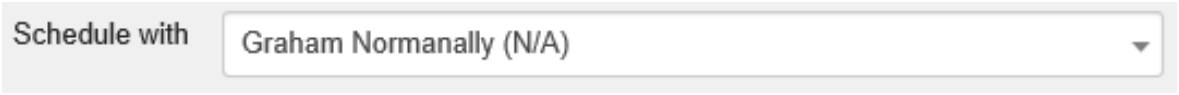
Â field.Â This should be brief, but easy to understand.

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

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14. 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.

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

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16. When ready and you have checked everything click on 

Â button

Attached files:

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