Types of CRM activities

The user can use activities registiered in the system can be used for creating BI analyses, e.g., when preparing report on negotiations with a client, on efectiveness of actions of particular employees or on probability of acquiring customers from different sectors etc.

To register marketing and sales actions, it is possible to add:

- **Contact** – usually a meeting of one employee with one representative of a customer.
- **Meeting** – detailed meeting with certain attendees, within specified time limits and place

CRM activities are available from the level of:

- *Main → CRM → My Activities* – the list presents actions associated with all customers/vendors
- **List of customers/vendors** – upon selecting a customer/vendor and clicking on [**Activities**] button, a list of all activties related to that customer/vendor is presented.

The visibility of activities for a logged-in operator depends on permissions assigned to operator groups.

CRM meetings

Meetings are used for registering information about conducted and planned conversations carried out by an employee/employees with contact persons in the specified time limits and generating certain costs.

On the *CRM Activities* list, in *All Activities* tab, all actions previously defined for a given customer/vendor are displayed. The following fields are available on the form of a new meeting:

- **Venue –** place of a held or planned meeting; venue name can be composed of an unlimited number of characters
- **Priority** – enables determining activity priority thanks to the values defined in the generic directory available from the level Configuration → *Generic Directories* → *CRM* → *Activity Priorities.*
- **Category** – allows for classifying a newly added object according to existing categories available from the level of C*onfiguration* → *Generic Directories* → *CRM*. → *Cetegories.* Predefined directory values: *Negotiations, Acquiring of Customer, Processing of Orders* and *Keeping of Customer.*
- **Set up the next contact in** – checking the parameter will create on the list an analogical contact whose date will be compliant with the time set in the filed of hours, days, weeks from the current contact or selected directly from a calander available aside.
- **Add to the calendar of employee** – if checked, an object will be also displayed in the calendar of an employee.
- **Expected Costs** – possibility of determining an expected cost of a meeting. Next to this fieled, there is a drop-down list which allows for defining te currency in which the expected cost will be determined.
- **Actual Costs** – determining of an organized meeting actually incurred. Next to this field, there is a drop-down list that enables to select the currency in which the actual costs are determined

To save a new meeting, it is necessary to complete:

- **Customer/Vendor**
- **Employee**
- **Contact person**

CRM contacts

Contacts are used for registering information about planned and conduced conversations carried out by an employee with contact persons of customers/vendors.

A new contact can be added from the level of:

- *Main → CRM → My Activities*
- *Main → Customers/Vendors → CRM Activities*

To save a new meeting, it is necessary to complete:

- **Customer/vendor** whom it concerns
- **Contact person**

In addition to the standard fields, the following fields are also available on the form:

- **Time** – field counting contact duration, that is the time from opening a new window to saving it. Next to this field, there is [**Start/Pause**] button on the left.
- **Set up the next contact in** – checking the parameter will create on the list an analogical contact whose date will be compliant with the time set in the field of hours, days, weeks from the current contact or selected directly from a calendar available aside.
- **Add to the calendar of employee** – if checked, an object will be displayed in the calendar of an employee.

- **Ended** – upon checking this parameter, all fields available in the window are deactivated.
- **Employee** – by default, this field displays an employee associated with a currently logged- in operator, with the possibility of changing it to another, defined in the system, employee.
- **Contact icon** – lows for proceeding to edition of another contact (specified on the form of a previously added contact, in the scheduling details panel) which is opened in a new window
- **Type** – enables to define the contact type (telephone, e-mail) by selecting a value from among the values defined in the generic directory *Contact Form* available in the menu *Configuration* → *Generic Directories* → *CRM* → *Contact Type*
- **Priority** – enables determining activity priority thanks to the possibility of selecting a value from a drop-down list containing values defined in the generic directory available from the level Configuration → *Generic Directories* → *CRM* → *Activity Priorities.*
- **Category** – allows for classifying a newly added object according to existing categories available from the level of C*onfiguration* → *Generic Directories* → *CRM*. → *Categories.*
- **Notes** – text box allowing for entering any string of characters. Moreover, for not ended activities on the list of CRM Activities (*Contacts, Meetings, Tasks*) it is possible to edit the *Notes* field directly in the list.
- **Customer/Vendor** – field completed automatically in case the list of activities is opened directly from the list of customers/vendors.

Section *Contact Persons* allows for attaching persons (Main → <<Contact Persons>>) who participate in the conversation.

Note
In the activity window, it is possible to add only a contact

person who is associated with a customer/vendor selected on the activity form. In case of adding an activity from the level of the list of all activities, the addition of contact persons is disabled until a customer/vendor has been selected (the plus button is inactive).