Synergist Spotlight on…

Activities

'Activities' form the basis of the CRM functionality within Synergist. Commonly used for recording New Business Activity but can be used throughout your Organisation providing an internal communication and monitoring system outside of individuals emails.

- Can be used for recording New Business Activity
- Can be scheduled into the future with email alert reminders
- Can be allocated to one or more users
- Reporting based on volume of Activity

1.   Activities

Activities are a note or task that can be created against many different records in Synergist. It generates a note where a description and comments can be added, it's also possible to specify actions that need to be taken and by whom and to set deadlines. When an Activity is allocated to someone for action, an email Alert can be sent detailing what needs to be done and by when. Synergist automatically creates history records against each Activity every time any change is made (e.g. if the Note Status is changed or the due date altered). It is therefore easy to track what progress has been made.

Activities can be accessed in the following Synergist screens or from the menu item in the tool bar:
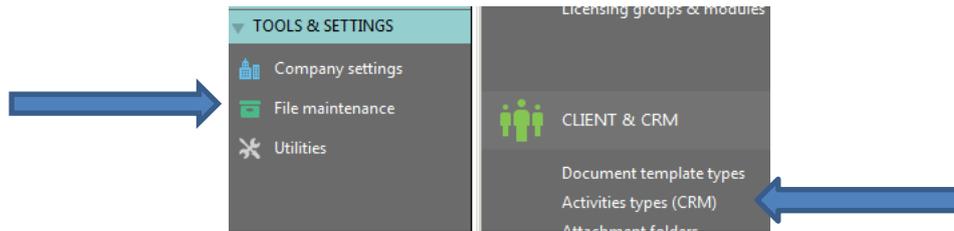
- Clients & Prospects
- Contacts
- Opportunities
- Jobs
- Phases
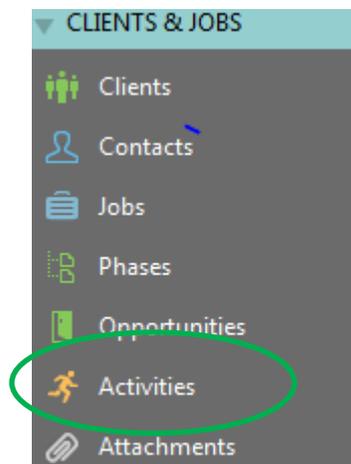
Key Super User TIP – Define the Activity Type categories

Define the Category of the Activity Type within File Maintenance/Activity Types CRM. Your Super User will have permission to do this. This will then allow for enhanced reporting.

The Types of Activity are **KEY** to creating reports & view settings.

Creating a New Activity

1. Go to a Prospect, Client, Job or Opportunity and browse to the **'Activities Tab'.**

2. Create a new activity by clicking the **"New"** button. The system will then ask for the activity type…

    Please Note: This list can be customised per company and is KEY to realising the potential of Activities.

    Please Note:
    This list can be customised per company and is KEY to realising the potential of Activities.

    Activity input screen

3. Enter the information relevant to the activity being logged

    - **Subject** -a short description of the action or topic of the activity; it is this field which is displayed in the activity list screens

    - **Details -** This is a text field (pre-set text can be included when customizing activities)

    - **History -** A summary of all the changes made to the activity record. (auto populated)

    - **Owner -** A note can be assigned to an owner, select the owner from dropdown list. A Priority and Due date can be set. The note can be marked when Complete.

    - **Contact -** Client contact name (their phone number is also displayed.)

- **Secondary owners** - You can optionally allocate others as secondary owners. Alerts regarding this activity can be sent to these people.

Alerts

Alerts can be set on any activity note. Alerts are sent to the "owner" of the activity and any "secondary owners"

There are 3 types of alert:

- Before due date
- Instant alert
- On completion

Alerts are sent to the user's normal email and contain details from the activity note.

**Customising your Activities List**

Activities are categorised by type to group them together, for example certain activities may required a task to be undertaken. Type is used for refining reports e.g. report only on tasks, or meetings.

As well as using activities for New Business activities can be used for requests to colleagues or authorisation of certain processes.

E.g. you could create an activity for authorising Credit Card spends over a certain value, or you could confirm authorising the write off of costs on a job. These activities will then be listed against the job for future reference.
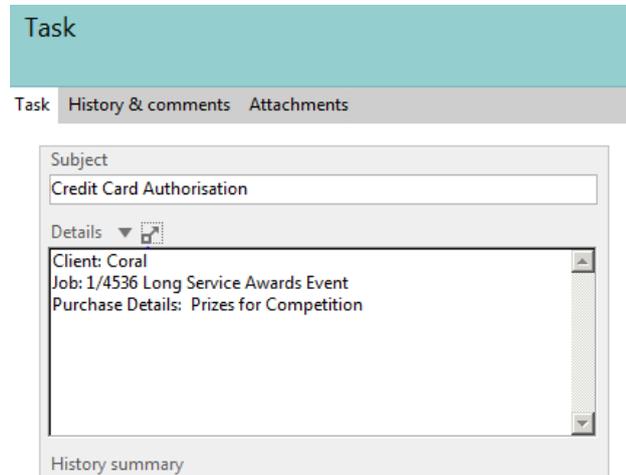
Reporting

Activity reports can be run from within the activities list screen by clicking on the printer icon or from within the Data Viewer dependant on the level of information that you would like to report on.

THE AGENCY WORKS
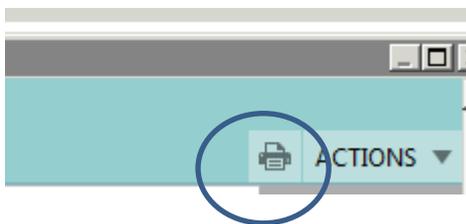
CRM Notes (Detail) Report

Type	Job/Phase	Client	Attach?	Created	Due	Time	Done	Action by	Prior
TODO	3/00300001	Hippo Marketing EU		29/10/13	29/10/13	08:00	00/00/00	Lesley Hill	2
description		Multiple Print Optiions - within a phase							
Description	Brief								
	Stage one concepts to be presented to client - Mood board required								
Created by	Lesley Hill								
Contact Details									
	Tel: or (Direct) Email:								
	HISTORY								
	Created 29/10/13 4:50pm by Lesley Hill -------------------------------								
	Transferred to Lesley Hill for actioning								
INV		LH Training		11/04/14	11/04/14	08:00	00/00/00	Lesley Hill	2
description									
Description	Weekly invoicing								

The Data Viewer can be used to report on volume of activity showing each type of activity created.

Activity Type	Activity Count	Total
NB Cold Call	31.00	31.00
NB Follow up Call	37.00	37.00
NB Meeting	7.00	7.00
NB Positive Conversations	12.00	12.00
TOTALS	**87.00**	**87.00**
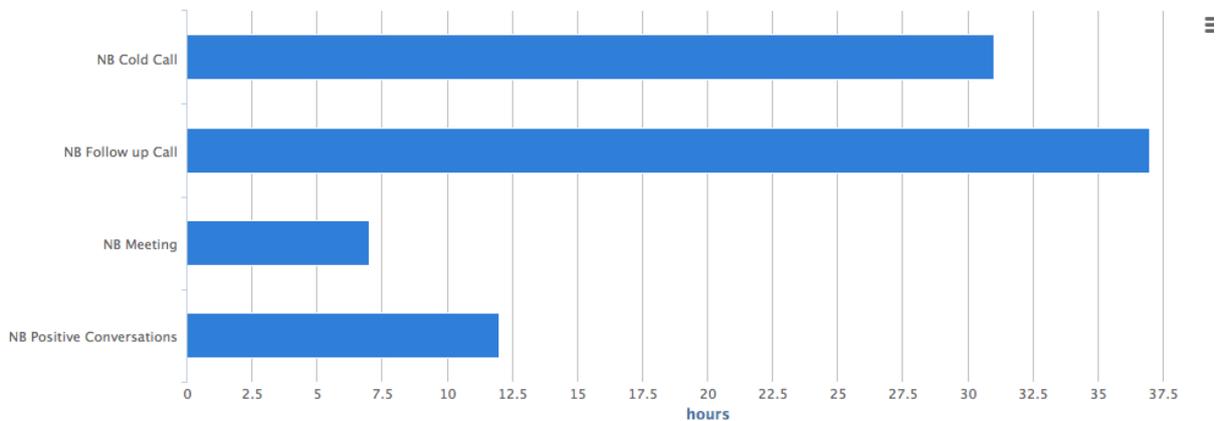
The use of Activities evolves as you start to use them and understand the benefit of this shared communication system.

The Agency Works Advice is to pick out a single process to manage via Synergist Activities. Create user views of open activities by category.

Please contact The Agency Works at clientservices@taw.co.uk or call us on 01455 553246 if you wish to discuss using Activities within Synergist.

THE AGENCY WORKS