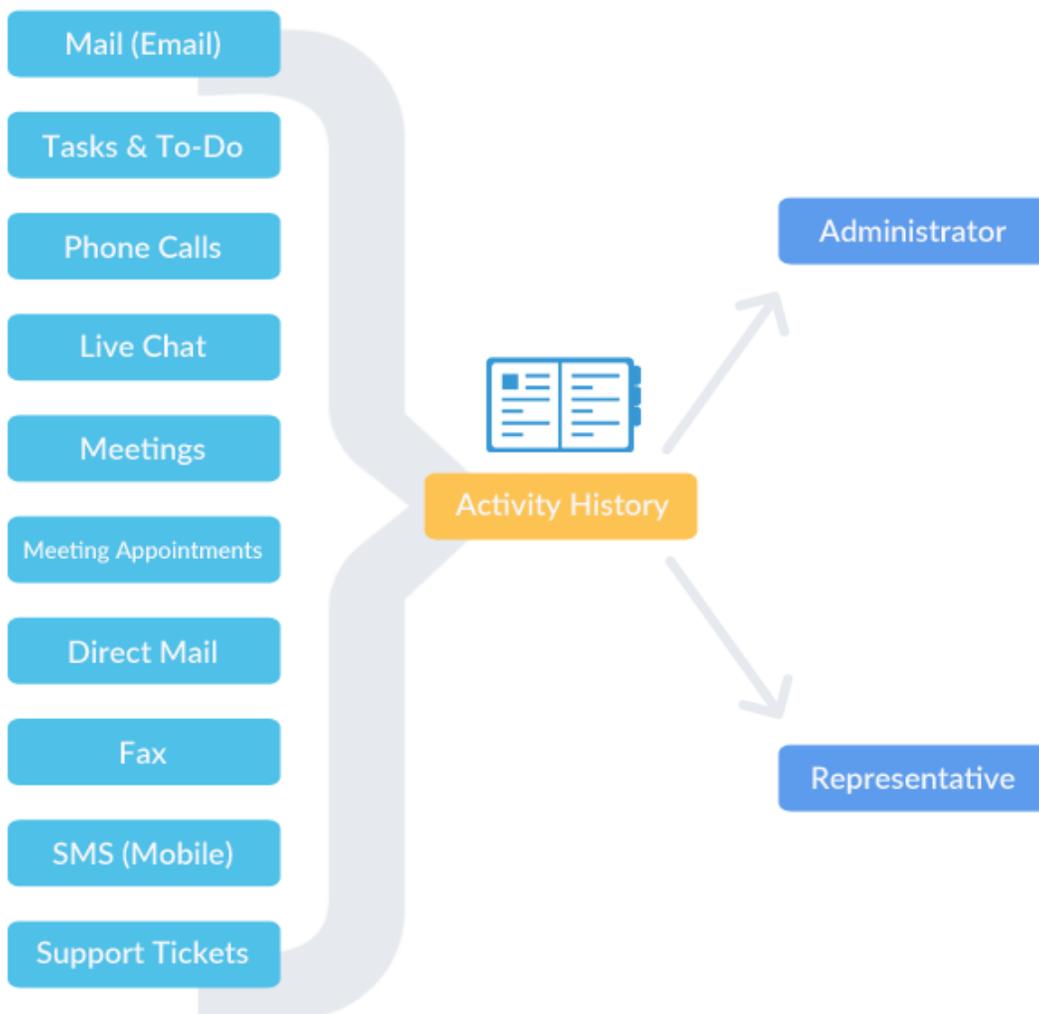


Moffice CRM Sales Activities

Introduction

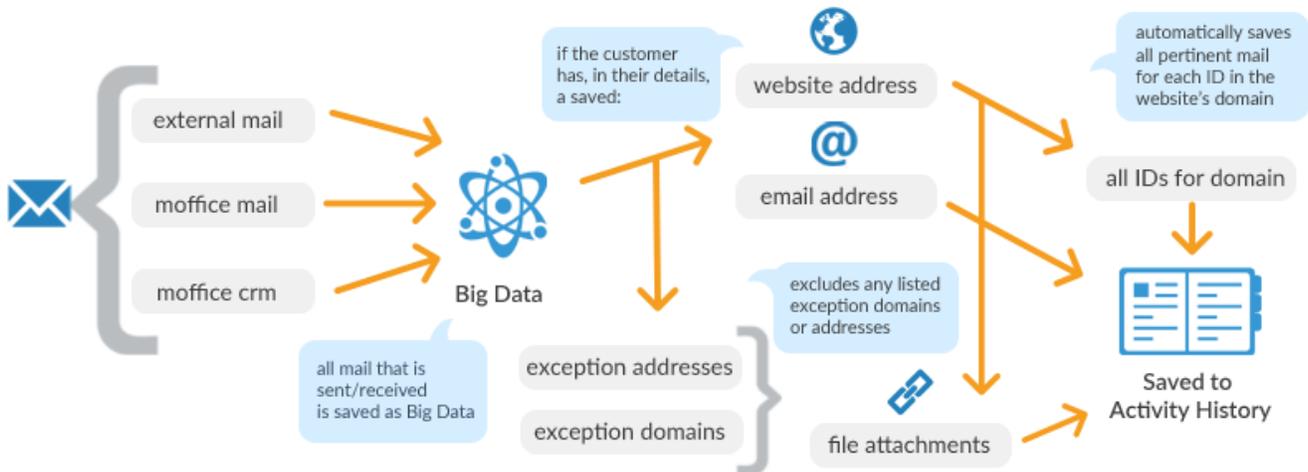
One of Moffice CRM's finest features being able to save all the interaction history you have with your clients. These can be in the form of meetings, phone calls, faxes, and more. When you view a Customer, you can see all the details related to these sales Activities. Some sales Activities feature automation like emails and some require manual input like meeting or direct mail content. Why is this important? Looking back through the history of a Customer helps companies better understand their customers and their needs. For administrators, this means that they can check all the details for sales and support Activities easily per field. Administrators can likewise use information from each contact's Activity History to learn about various issues that Customers experience as well as gain insight as to why failed Opportunities occur. Representatives can enjoy easy data input for reports and work with Moffice CRM. Activity History also helps serves as a memory record for Reps about what has been said, done, and more related to the contact.

There are several different types of sales Activities you can save to Customer records in Moffice CRM. Let's take a look at each type of Activity and how the data for each is input, saved, and then saved to a contact's Activity History. Below are the types of Activities we'll be going over.



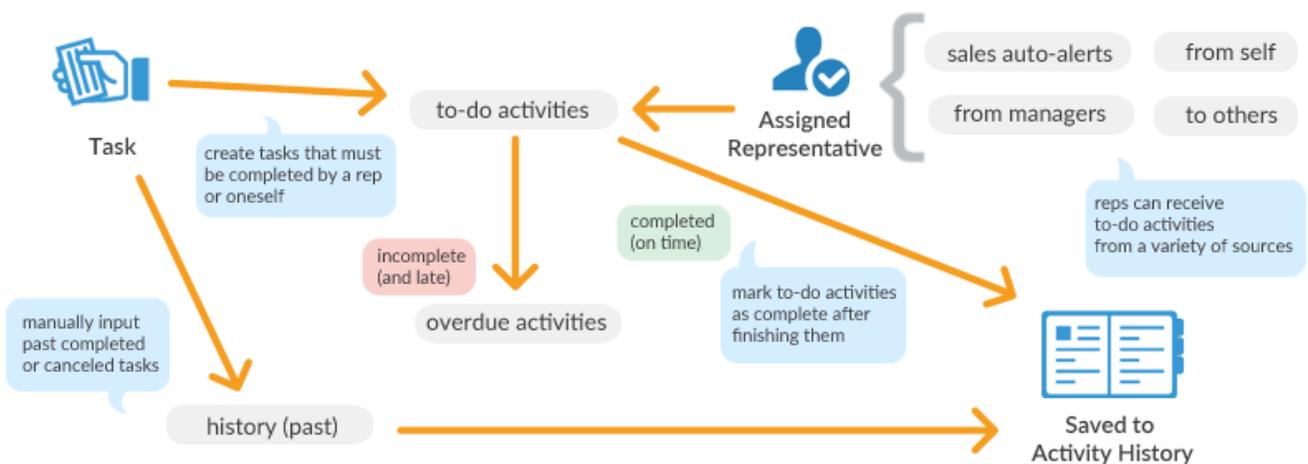
Mail

Mail refers to email sales Activities. Email is the most automated sales Activity process in Moffice CRM. When you send or receive mail to or from a Lead, Potential, or Customer through a registered external mail address, Moffice Mail/Collaboration, or Moffice CRM, the mail is saved as Big Data. Subsequently, after its sender and recipients have been checked for excepted addresses and domains, the mail is ready to be saved. If the contact has a registered Web site URL, Moffice CRM will automatically save all mail content from the IDs for that domain to the their record. Likewise, contacts with email address information added will have the mail content saved to the contact's Activity History as well. Additionally, file attachments on these from these recognized addresses will be saved to Activity History. Emails can also be scheduled to "Send Later" for optimal deliveries.



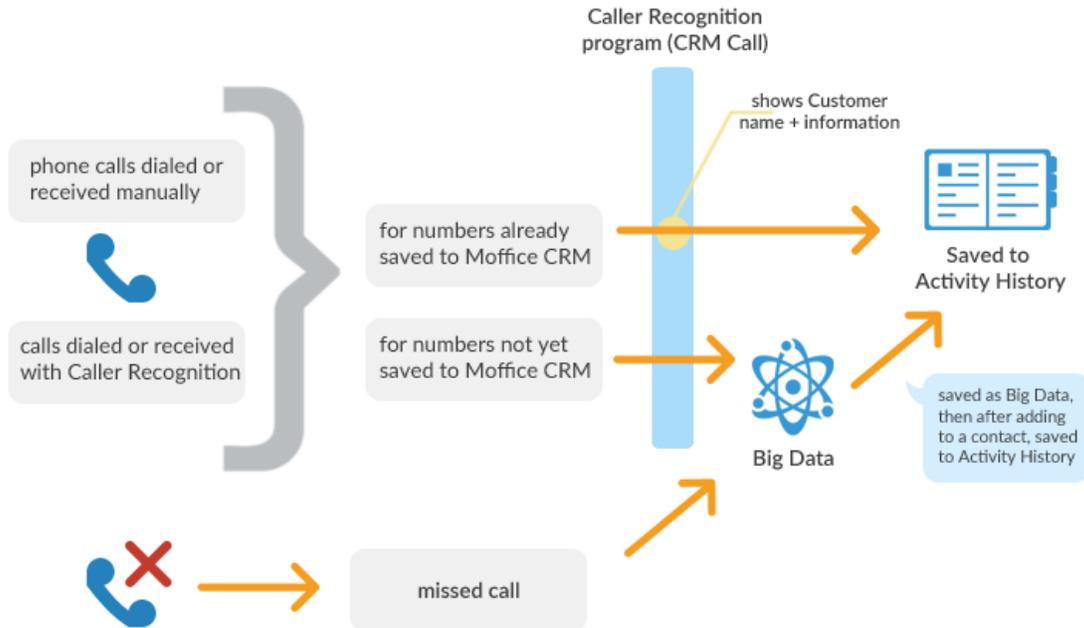
Tasks & To-Do Activities

Tasks help you get work done. You can either add a Task as a past event that has been completed or canceled or a To-Do Activity that requires attention. Past Tasks are then saved to the Activity History of the respective contact. As for To-Do Activities, assigned Reps engage in them. To-Do Activities can come from sales auto-alerts for events like New Customers or Win-Back, from managers, from oneself, and they can also be sent to other Representatives. Reps can also see their assigned To-Do Activities on their Dashboard, so they can easily mark them as completed whenever they finish the Task. To-Do Activities that are left incomplete by the assigned deadline will be placed in the Overdue Activities list and should be completed as soon as possible. Completed To-Do Activities are saved to the contact's Activity History.



Calls

Phone calls are easily added to Moffice CRM. Through the Caller Recognition program, you can easily call Customers and Potentials and add the call data to the registered contacts' Activity History. Likewise, receiving calls from Internet phones will make a pop-up appear with the contact's information (if added to the CRM previously) so you can make the call a personalized experience and know essential facts about the contact. Landline phone call content can be added manually and subsequently saved to the contact's Activity History. For phone numbers that have yet to be added, the call content is saved temporarily as Big Data until a contact record is created, then the call record is saved to that contact. Missed calls are also temporarily saved as Big Data.



Live Chat

Live Chat records are likewise saved in Moffice CRM. Potential clients initiate Live Chats from your Website and sales or service Reps respond through the Moffice Talk messenger. The chat is then recorded and saved to the Live Chat records in the Help Desk menu. From here, if the chat record is linked to a Lead, Potential, or Customer, the record is saved to the contact's Activity History. Otherwise, the chat remains saved to Moffice CRM but not to any contact record. Missed chats can be sent as Tickets or Tasks for later service.



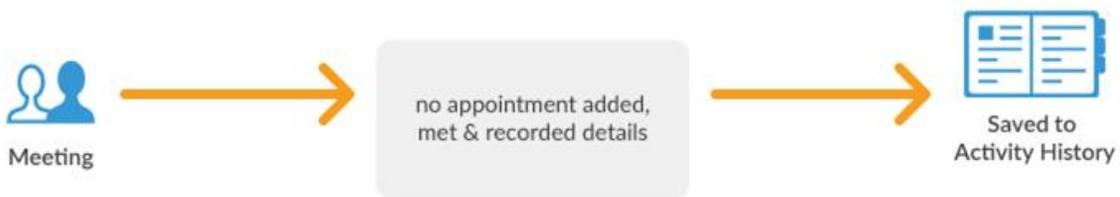
Meeting Appointments

Meeting Appointments are basically To-Do Activities specially for Meetings. Setup Meeting Appointments and send them to yourself or others as a To-Do Activity. When the meeting is complete, convert the Meeting Appointment to a Meeting and add the agenda, details, and other related information to Moffice CRM and the record will be saved to the contact's Activity History.



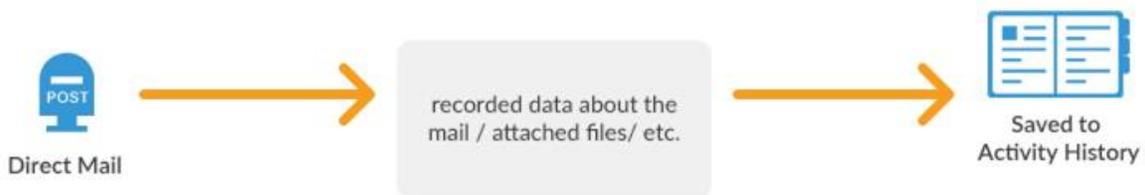
Meetings

Meetings that were initiated and completed without a Meeting Appointment can be added directly to the contact's Activity History.



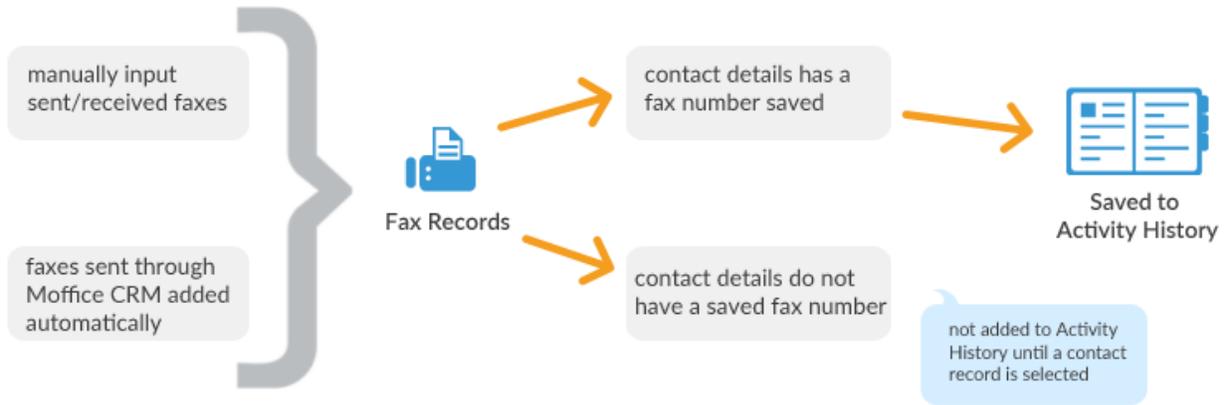
Direct Mail

Direct Mail refers to all physical post related sales Activities. You can manually input direct mail content from and to contacts to their Activity History.



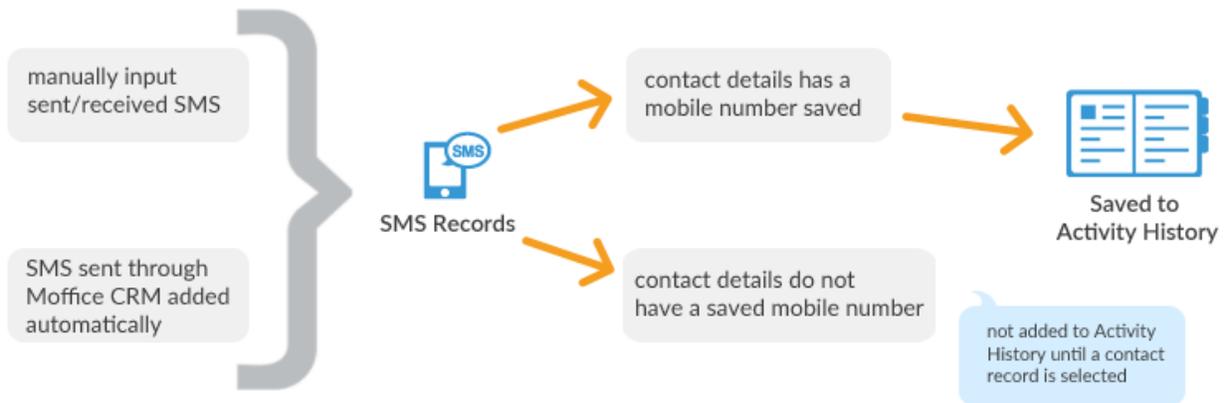
Fax

For faxes, you can add the fax content to Moffice CRM manually or automatically if you use our e-Fax service. If the fax is registered to a previously saved contact's fax number, the content is saved to their Activity History. Otherwise, the fax content is not saved to any contact's record. Faxes can also be scheduled to "Send Later" for optimal deliveries.



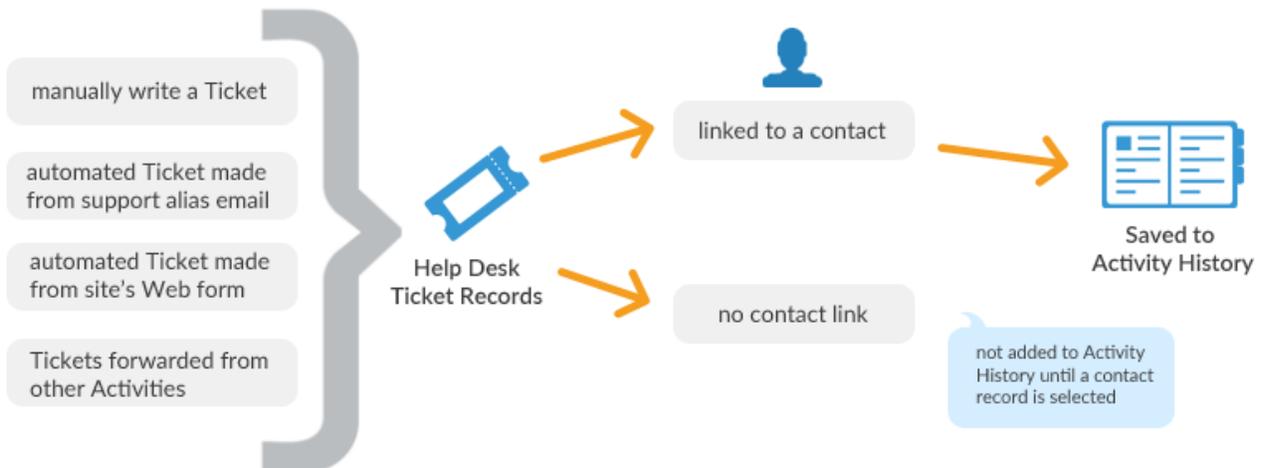
SMS

SMS text message content may be added to Moffice CRM manually or automatically through our e-SMS service. For SMS' sent to an identified contact's mobile number, the SMS content will be saved to their Activity History. For unidentified mobile numbers, the SMS record will not be added to any contact's Activity History. SMS messages can also be scheduled to "Send Later" for optimal deliveries.



Support Tickets

Support Tickets can be created either manually through writing a Ticket or automatically through forwarding from selected support email addresses, Website Web forms, or from other Activities. These are then added to the Help Desk menu in the Tickets sub-menu. If you link the Ticket to a contact, the content will be saved to the contact's Activity History. Otherwise, the Ticket content will only be saved to the Help Desk and not added to any contact record.



Now that we've run down the Activities, we'll take a closer look at assigned work. When should a Rep or manager assign Tickets vs. To-Do Activities? To-Do Activities should be for specific work for specific Reps while Tickets should be open for any Rep who can handle it.

Activities	VS	Tickets
Set Assigned Rep		Available for any Rep
Does not require progress checks		Requires progress checks
From managerial order		Request by contact

★ *Phone calls / Live Chats / Email can be forwarded as a To-Do Activity or a Ticket

Finally, here is a handy reference for all sales Activities. This guide shows how each type of Activity is saved what you can do with it in Moffice CRM.

Sales Activity	Save to Activity History		Set as To-Do Activity	Add as Ticket to Help Desk	Schedule to Send Later
	Auto-Save	Manual			
 Calls					
 Tasks					
 Meetings					
 Mail					
 Direct Mail					
 Faxes					
 SMS					
 Tickets					
 Live Chats					