

Activity

Means recording activities. Who have contact with customers or individuals. Both internal and external. That activity in any form began when. And ends when The store's history in order to retrieve it later.

This type of logging activities

This type of logging activities are 3 types.

- **Task** is to record the activities of the "Work"
- **Phone** is documenting the activities of the "Call - the call via telephone"
- **Email** is logging activity. This type of "Receiving - sending email through"

The priority of the logging activities

The importance of documenting activity has 3 levels.

- **Low** of activity in the "Low"
- **Medium** of activity in the "Medium"
- **High** priority activities "High"

Status of recording activity

Status of recording events with a total of 4 states.

- **Not Start** is the state of things in the not begin operations.
- **In progress** is the status of the activity is under implementation.
- **Suspended** is the state of things during the sliding action.
- **Complete** status of activities completed during the operation.

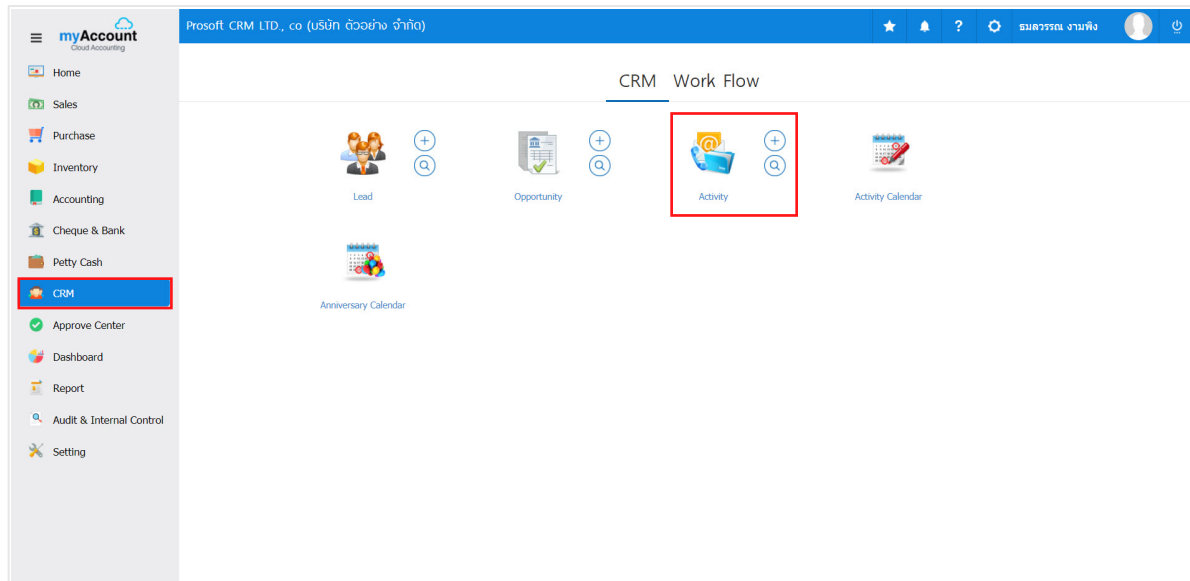
Windows of recording activity

The recording will split the recording into 5 parts.

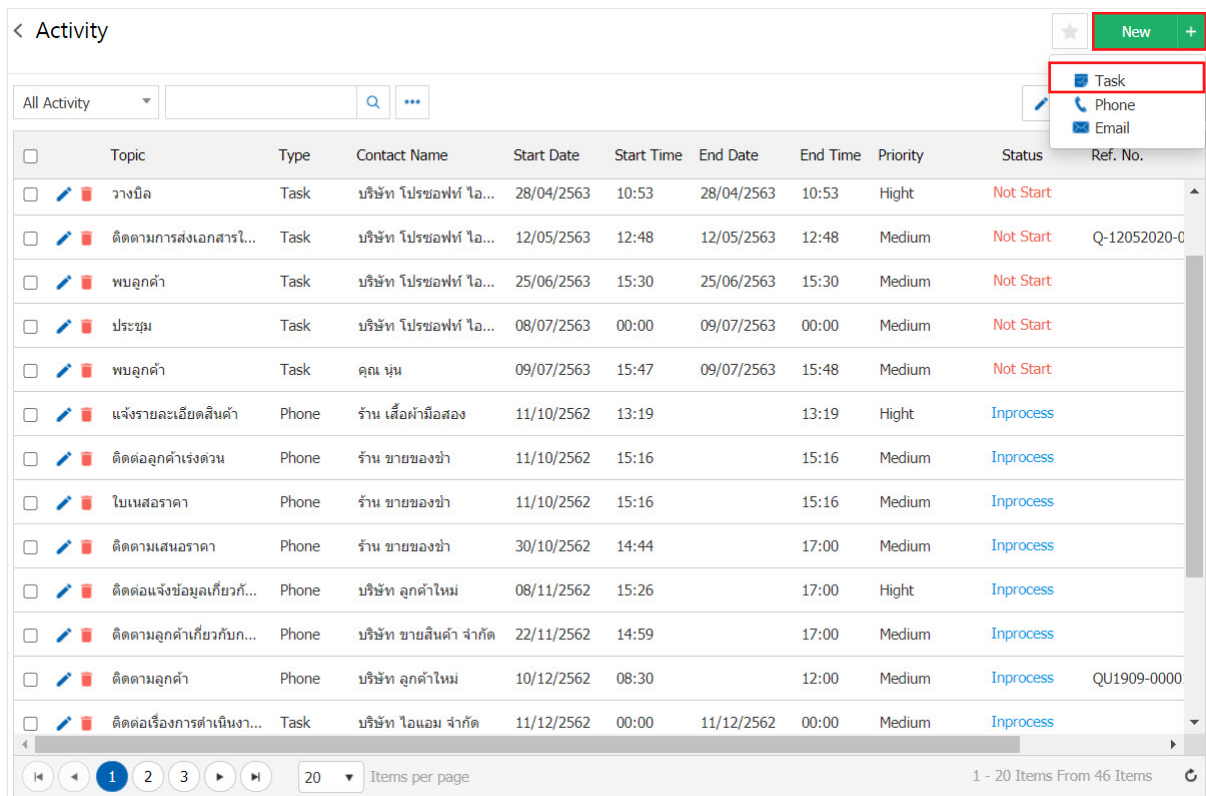
- **Basic Data** is detailed logging information, contact the course topics and details.
- **Location** is the designated place to meet with clients.
- **Follower** is to assign employees. Who to contact customers.
- **Facility** is to set the device to meet a client.
- **Notification** is the timing / channel notification.
- **Define Field** is the data that users create a form to fill out information on their own tab (Define Field will only appear if it is set Define Field only).

The recording process activity type "Task"

1. Activity Log, users can type "Task" menu by pressing "CRM" > "Activity" Figure.



2. The system will display a list of data types Task Task enables users to create new categories. by pressing the "New" > "Task" on the top right of the screen shown in Figure.



3. In the "Basic Data" is to record details of task as the contact start / end thread details and so on user's Fill in the form marked "*" are required Figure.

< New Task

Preview
Save
Close

Basic Data

Location

Follower

Facility

Notification

Note & Attachment

| | |
|---|---|
| <p>Type <input checked="" type="radio"/> Out side <input type="radio"/> In house</p> <p>* Contact A6210-015</p> <p>Contact Name Company ซีดับบลิวที เอเชี่ย จำกัด</p> <p>Coordinator 0-2047-9565</p> <p>Phone 0947090037</p> <p>* Topic ออกไปพบปะกับลูกค้า</p> | <p>* Priority Medium</p> <p>* Start Date 29/09/2563</p> <p>* Start Time 0:00 - 0:00 <input checked="" type="checkbox"/> All Day</p> <p>* Owner EMP-1910001</p> <p>Reference AP Beginning Bala</p> <p>Cost 200.00</p> <p>* Status Inprocess</p> <p>* End Date 29/09/2563</p> |
|---|---|

Detail

-นำเสนอราคาสินค้าให้กับลูกค้า ที่มีความสนใจสินค้าประเภทอุปกรณ์สำนักงาน

-ดูรายละเอียดอื่นๆ เพิ่มเติม

4. In the "Location" is to record information at appointments. Users can search for a location, as shown in Figure.

New Task

Preview

Save

Close

Basic Data

Location

Facility

Notification

Note & Attachment

Place

ร้านกาแฟเมซอน สาขาเซ็นทรัลเฟสติวัลเชียงใหม่ ชั้น 1

Search

เซ็นทรัลเฟสติวัลเชียงใหม่

Latitude

18.8064796

Long...

99.0181221

5. In the "Follower" is scheduled to meet with staff to contact customers. Users can customize the employee by pressing the "+" will show employee of the Company. Users can add multiple individual employees have shown.

< New Task

Preview

Save

Close

Basic Data

Location

Follower

Facility

Notification

Note & Attachment

Follower

+

☐

Employee No.

Employee Name

◀

◀

0

▶

▶

20

▼

Items per page

Data not found

Select Follower

| <input type="checkbox"/> | Employee No. | Employee Name | Position Name | Department Name |
|-------------------------------------|---------------|-------------------|------------------------------|-----------------------|
| <input checked="" type="checkbox"/> | EMP-00001 | ธมลวรรณ งามพิง | ผู้จัดการฝ่ายบัญชีและการเงิน | แผนกเทคโนโลยีสารสนเทศ |
| <input checked="" type="checkbox"/> | EMP170628-... | สุภาวดี ถิปปรี | เจ้าหน้าที่บัญชี | Accounting |
| <input type="checkbox"/> | EMP170628-... | สุภาพร อินคำเชื้อ | พนักงานขาย | แผนกพนักงานขาย |
| <input type="checkbox"/> | EMP170628-... | พิชิตพล อนุวงศ์ | เจ้าหน้าที่จัดซื้อ | แผนกจัดซื้อ |
| <input type="checkbox"/> | EMP-1910001 | ธมลวรรณ งามพิง | เจ้าหน้าที่ดูแลระบบ | แผนกเทคโนโลยีสารสนเทศ |
| <input type="checkbox"/> | EMP600704-... | นฤมล เนตรสว่าง | เจ้าหน้าที่บัญชี | Accounting |
| <input type="checkbox"/> | EMP600711-... | Training 1 | เจ้าหน้าที่บัญชี | Accounting |

1

2

3

4

20

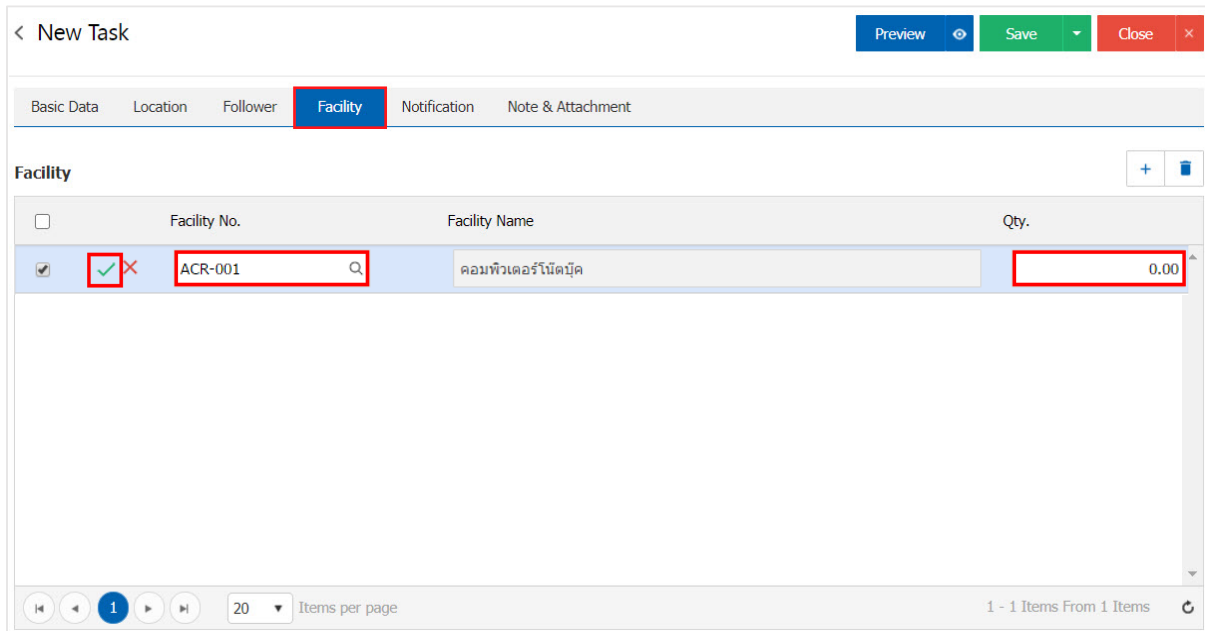
Items per page

1 - 20 Items From 75 Items

Select

Cancel

6. In the "Facility" is to define a device that allows us to meet with clients. Users can customize the device by pressing the "+"> "Select a Device"> "System number" Users can add devices have multiple Figure.



< New Task Preview Save Close

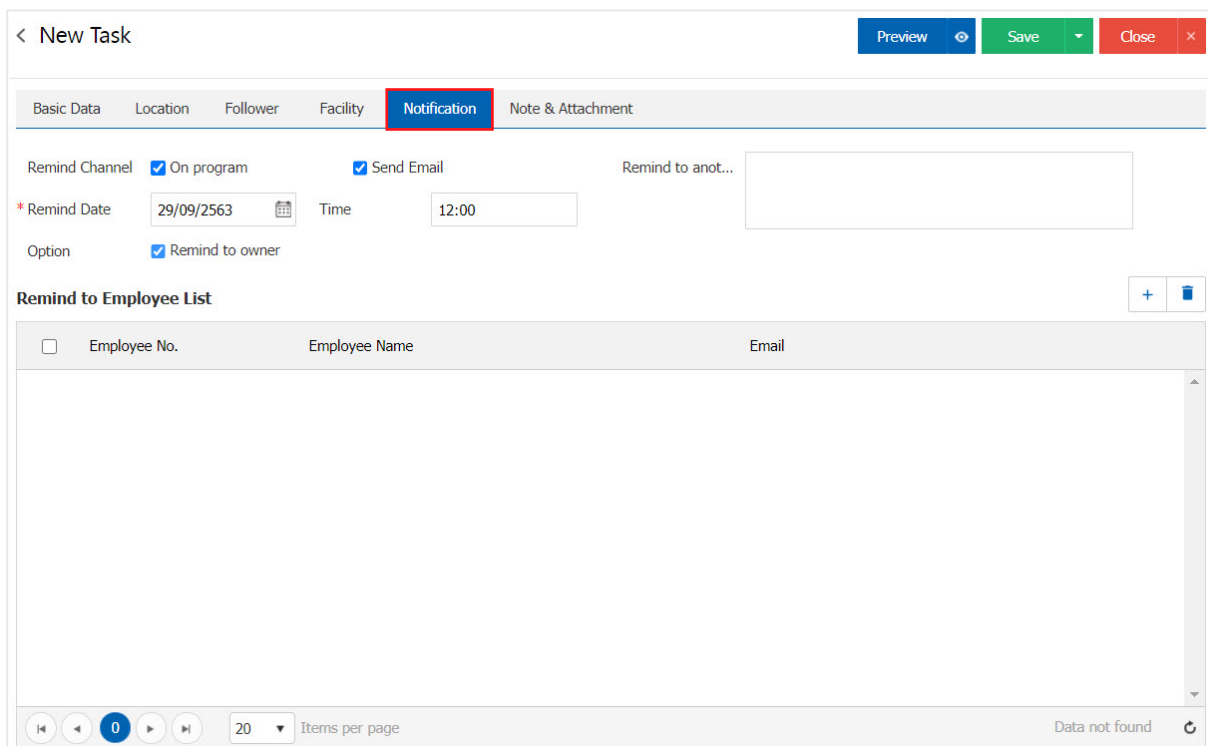
Basic Data Location Follower **Facility** Notification Note & Attachment

Facility + -

| | Facility No. | Facility Name | Qty. |
|-------------------------------------|--------------------------------------|---------------------|-----------------------------------|
| <input checked="" type="checkbox"/> | <input type="text" value="ACR-001"/> | คอมพิวเตอร์โน้ตบุ๊ค | <input type="text" value="0.00"/> |

1 20 Items per page 1 - 1 Items From 1 Items

7. In the "Notification" is to set the date / time notifications Channel Alerts Users can schedule notifications on or email Figure.



< New Task Preview Save Close

Basic Data Location Follower Facility **Notification** Note & Attachment

Remind Channel ☒ On program ☒ Send Email Remind to anot...

* Remind Date Time

Option ☒ Remind to owner

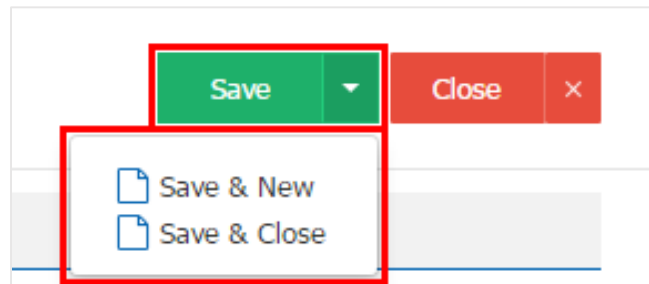
Remind to Employee List + -

| | Employee No. | Employee Name | Email |
|--|--------------|---------------|-------|
|--|--------------|---------------|-------|

0 20 Items per page Data not found

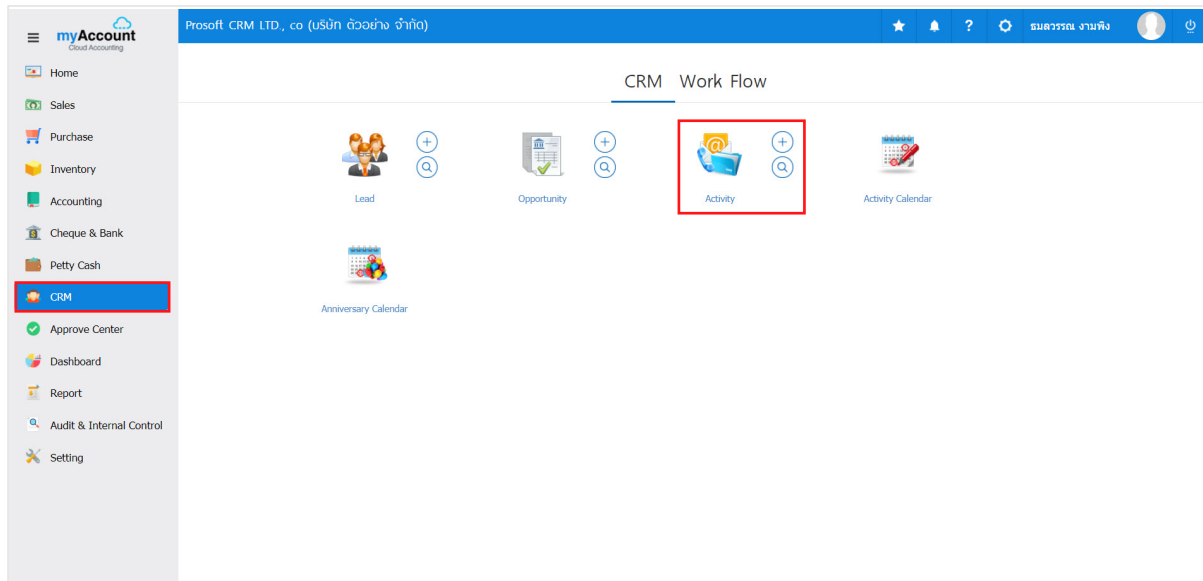
8. After the check is complete, press the "Save" button at the top right of the screen to save the data of Task. The recorded data can be divided into 3 recording formats:

- Save the recording of information along with the regular Task successfully saved.
- Save & New: the record opens with new data types when users log Task Types Task completed. The system will display the data of Task immediately.
- Save & Close: to save and return to the top of the list when users type Task record types already. Will be added to the list of Task immediately.

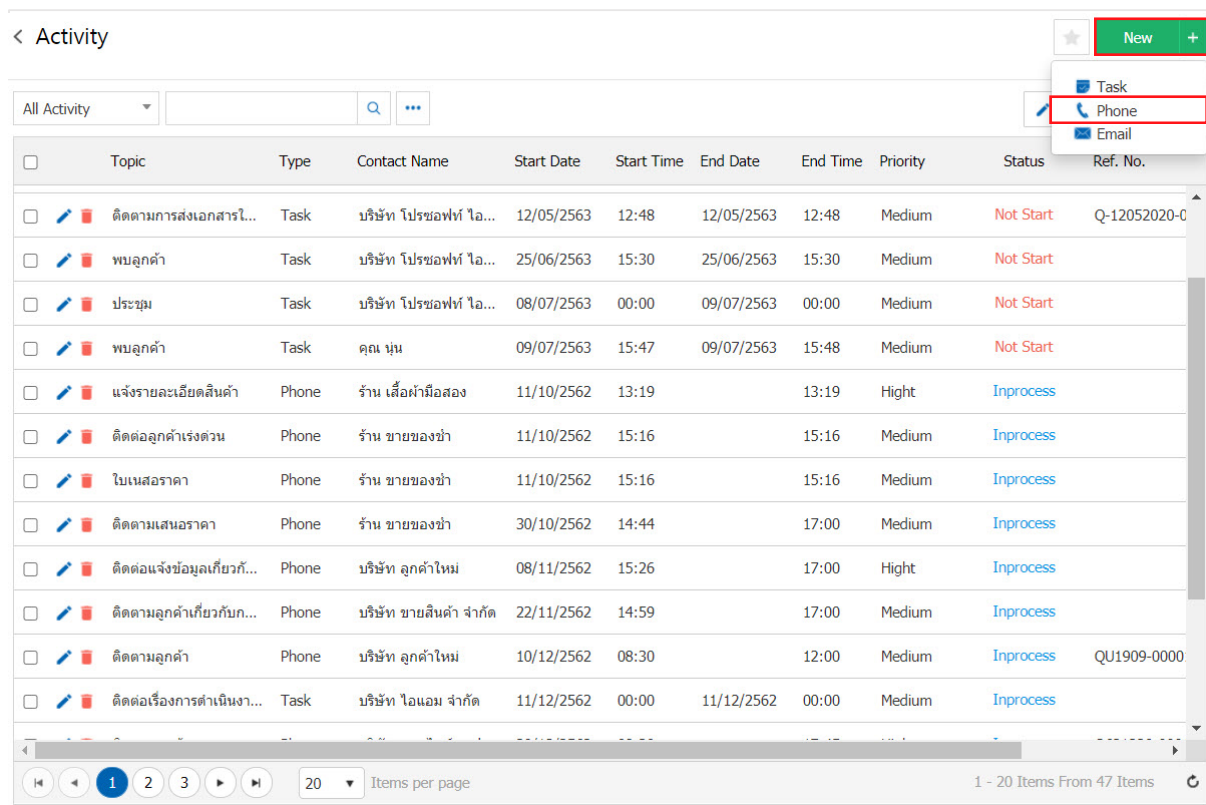


The recording process activity type "Phone"

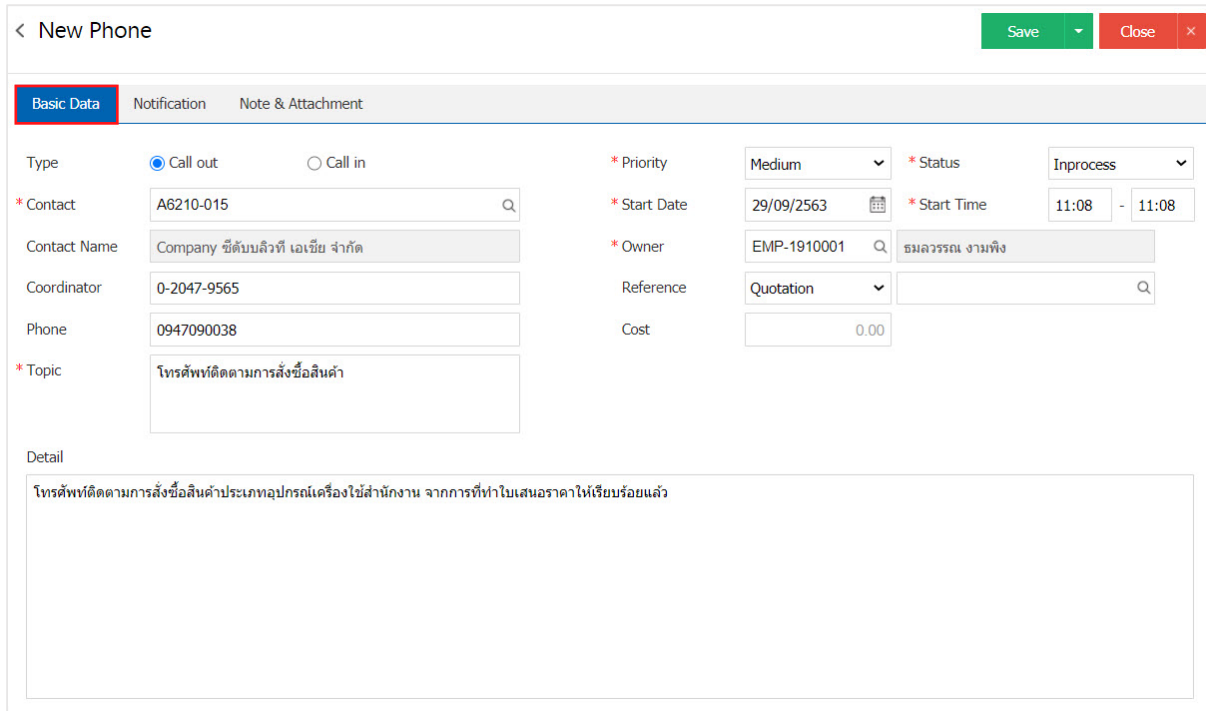
1. Activity Log, users can type "Phone" menu by pressing "CRM" > "Activities" Figure.



2. The system will display a list of data types Phone, Phone users can create new categories by pressing the "New" > "Phone" in the upper right of the screen shown in Figure.



3. in the "Basic Data" is to record detailed information of Phone as the contact on the start / finish section, contact details a sample Users should fill in the form marked "*" are required Figure.



< New Phone Save Close

Basic Data Notification Note & Attachment

Type ☒ Call out ☐ Call in * Priority Medium * Status Inprocess

* Contact A6210-015 * Start Date 29/09/2563 * Start Time 11:08 - 11:08

Contact Name Company ชีตัมบลิทที เอเจซี จำกัด * Owner EMP-1910001 ชมลวรรณ งามเพ็ญ

Coordinator 0-2047-9565 Reference Quotation

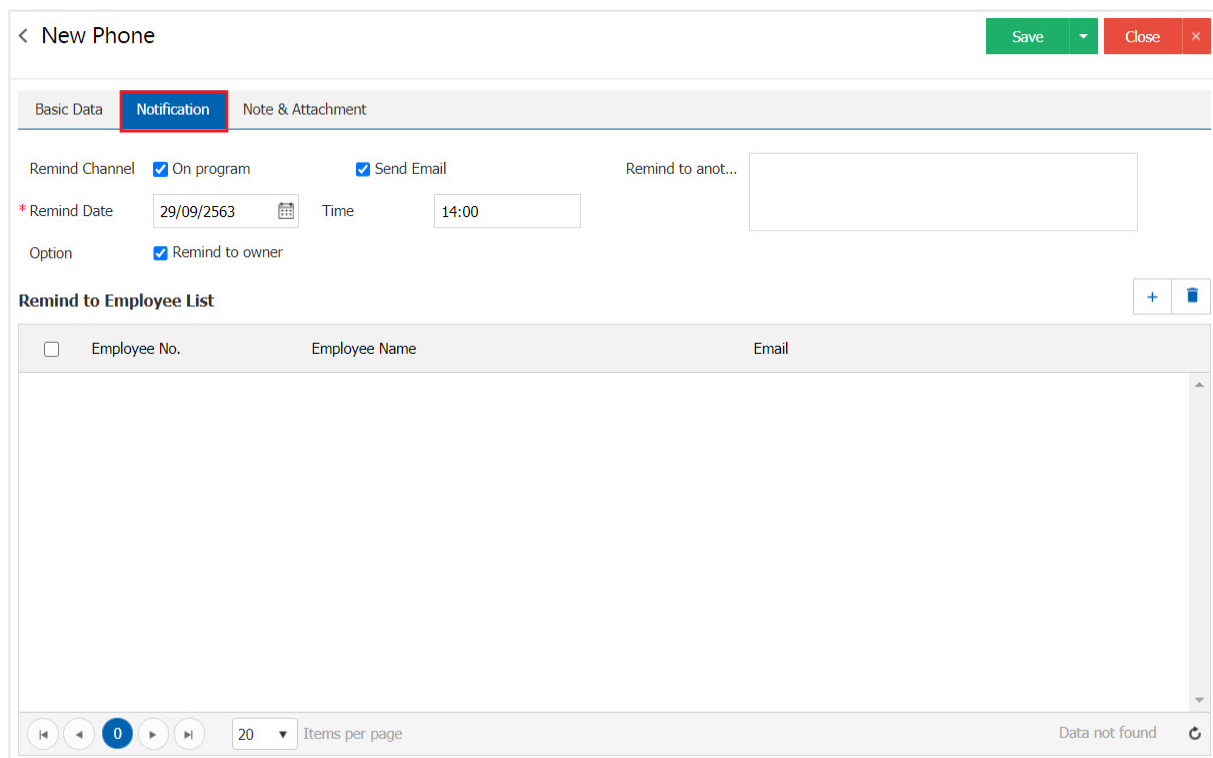
Phone 0947090038 Cost 0.00

* Topic โทรศัพท์ติดตามการสั่งซื้อสินค้า

Detail

โทรศัพท์ติดตามการสั่งซื้อสินค้าประเภทอุปกรณ์เครื่องใช้สำนักงาน จากการที่หาใบเสนอราคาให้เรียบร้อยแล้ว

4. In the "Notification" is to set the date / time alerts. Channel Alerts Users can schedule alerts via email or on the picture.



< New Phone Save Close

Basic Data **Notification** Note & Attachment

Remind Channel ☒ On program ☒ Send Email Remind to anot...

* Remind Date 29/09/2563 Time 14:00

Option ☒ Remind to owner

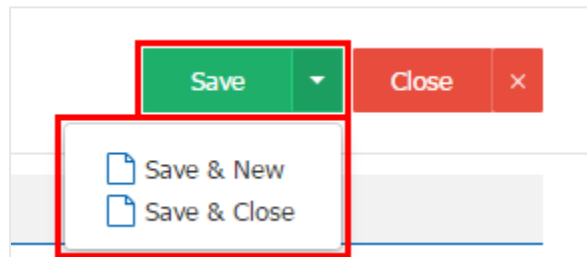
Remind to Employee List

| <input type="checkbox"/> | Employee No. | Employee Name | Email |
|--------------------------|--------------|---------------|-------|
| Data not found | | | |

0 20 Items per page

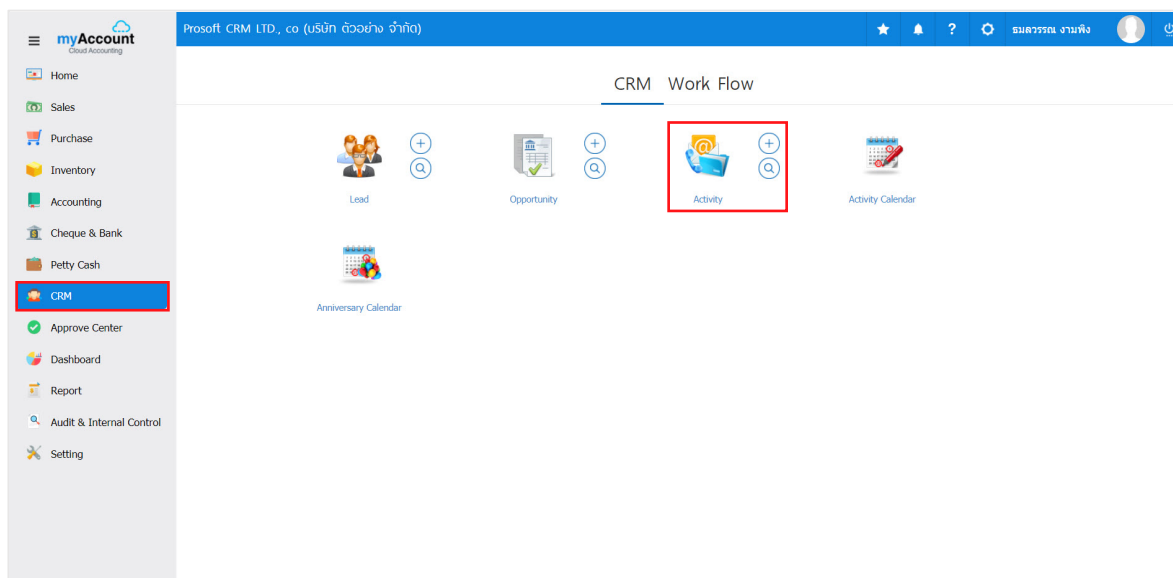
5. After the check is complete, press the "Save" button at the top right of the screen to save the data type Phone by recording data can be recorded into 4 form.

- Save is to save the sector. Phone information is shown along with successfully saved.
- Save & New to save and open saved pages when users type a new Phone type Phone recording smooth. FDA The system will display the type Phone Recording immediately.
- Save & Close is to save and return to the top of the list when users type Phone type Phone Recording successfully. The system will reverse the display of all types Phone immediate.

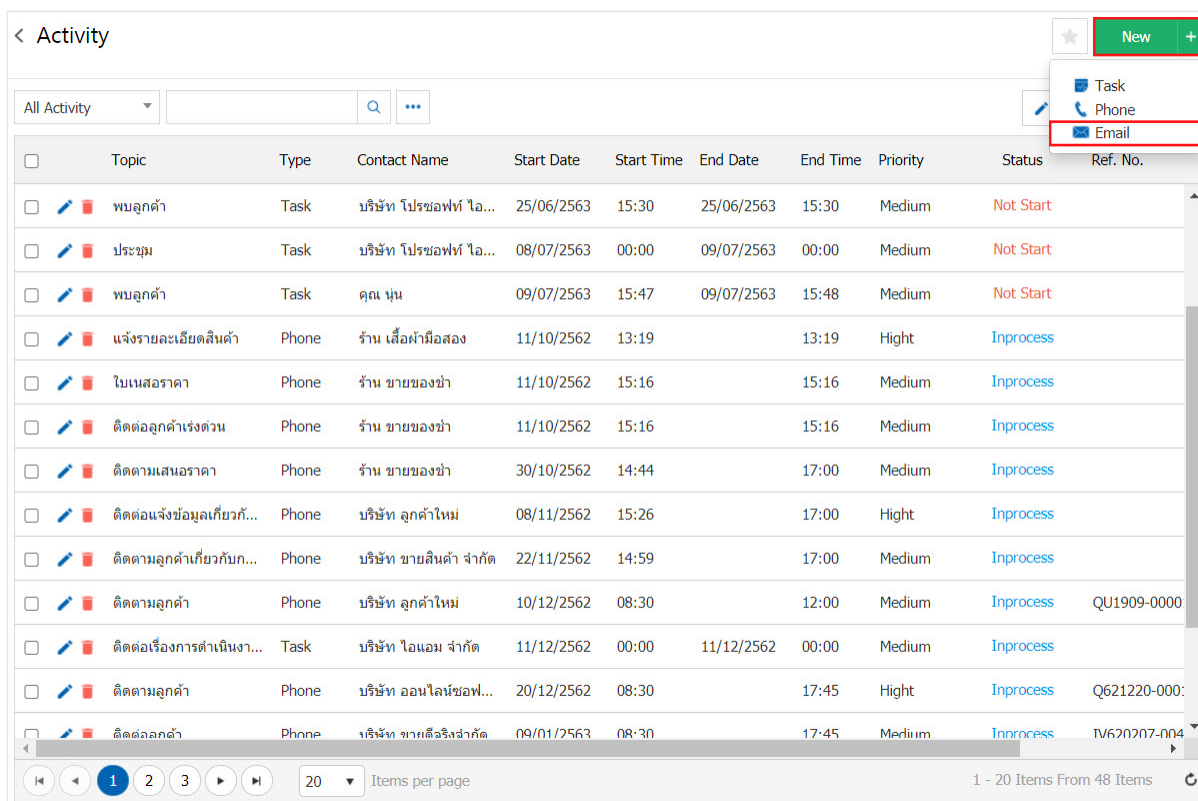


Steps to save the event type "Email"

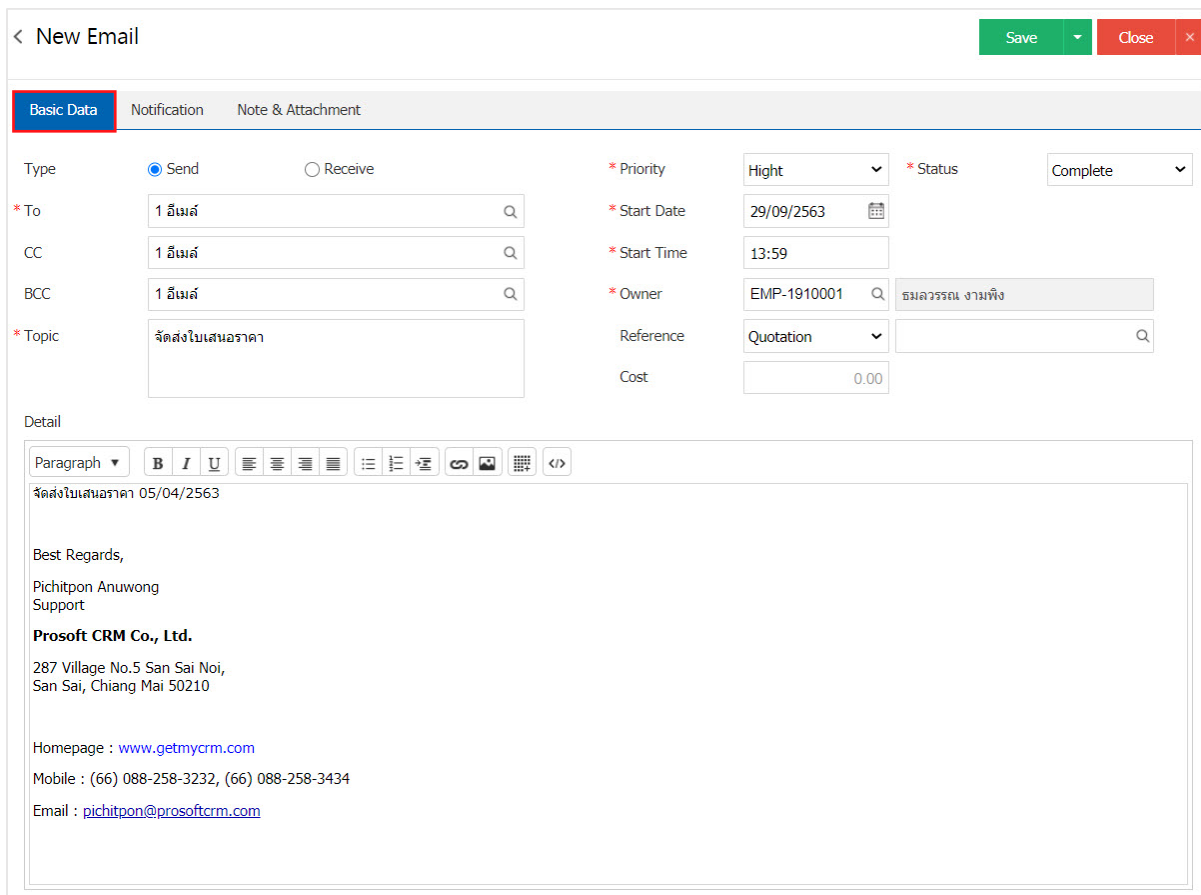
1. Activity Log, users can type "Email" menu by pressing "CRM" > "Activity" below.



2. The system will display a list of data types Email. Email enables users to create new categories by pressing the "New" > "Email" in the upper right of the screen shown in Figure.



3. In the "Basic Data" is recorded profile Type email like to / CC on the start / finish section details the email so the user should fill in the form marked "*" are required Figure.



< New Email Save Close ×

Basic Data Notification Note & Attachment

Type ☒ Send ☐ Receive * Priority High * Status Complete

* To 1 อีเมล * Start Date 29/09/2563 * Start Time 13:59

CC 1 อีเมล * Owner EMP-1910001 ชมลวรรณ งามพึ้ง

BCC 1 อีเมล * Reference Quotation

* Topic จัดส่งใบเสนอราคา Cost 0.00

Detail

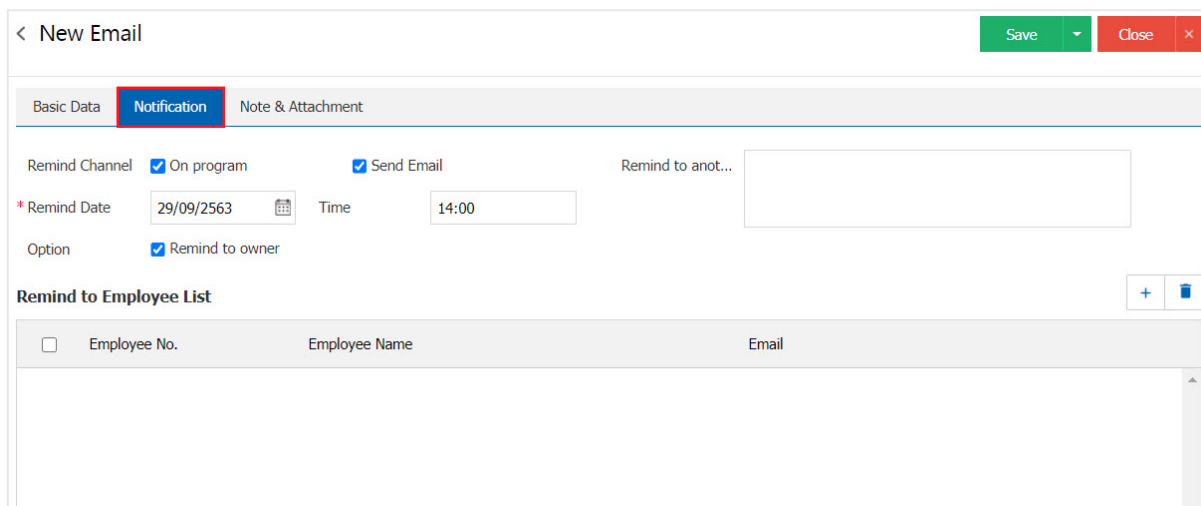
Paragraph **B** *I* U [List Icons] [Link Icon] [Image Icon] [Table Icon] [Code Icon]

จัดส่งใบเสนอราคา 05/04/2563

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San Sai, Chiang Mai 50210

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Mobile : (66) 088-258-3232, (66) 088-258-3434
Email : pichitpon@prosoftcrm.com

4. In the "Notification" is set. the Place / time alerts. Channel Alerts Users can schedule notifications on or email Figure.



< New Email Save Close ×

Basic Data **Notification** Note & Attachment

Remind Channel ☒ On program ☒ Send Email Remind to anot...

* Remind Date 29/09/2563 Time 14:00

Option ☒ Remind to owner

Remind to Employee List + ×

| <input type="checkbox"/> | Employee No. | Employee Name | Email |
|--------------------------|--------------|---------------|-------|
| | | | |

5. After the check is complete, press the "Save" button at the top right of the screen to save the data type Email. the recorded data can be divided into 4 recording format:

- Save Email normal type is recorded along with information already recorded.
- Save & New to save and open saved pages when users type new data types Email successfully. The system will display the new data types Email immediately.
- Save & Close to save and return to the category list page Email When users log out successfully. The system will display a list of Email feedback immediately.

