

GETTING STARTED

ACTIVITIES

An Activity is any interaction with your customer. In order to improve customer relationships, you need to focus on each and every interaction made by your customers with your brand. CRM can track all these activities throughout their life cycle - from prospect to existing client up-sell.

ACTIVITIES FROM THE HOMEPAGE

You can access 'My Activities' from the CRM Main Homepage. This will be a list of all the activities linked to you regardless of which customer:

[Basics: Activities](#)

[Basics: Today's Activities](#)

[Basics: Recent Activities](#)

[Basics: Add Activity](#)

ACTIVITIES FROM THE CUSTOMER HOMEPAGE

You can access 'Activities for [Customer Name]' from the Customer Homepage. This will be a list of the activities linked only to that specific customer and you.

[Customers: Activities](#)

[Customers: Open Activities](#)

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