Using Activities

The **Activities** module in ResellPortal CRM allows you to schedule, track, and manage all interactions and tasks related to your business. From emails and meetings to calls and tasks, the Activities module ensures that you stay organized and never miss an important follow-up. The built-in calendar provides a centralized view of your upcoming commitments. This guide will walk you through each component of the Activities section.

1. Navigating to the Activities Module

1. Log in to your ResellPortal CRM dashboard.
2. Locate the main navigation menu on the left-hand side.
3. Click on **Activities** to access the module.

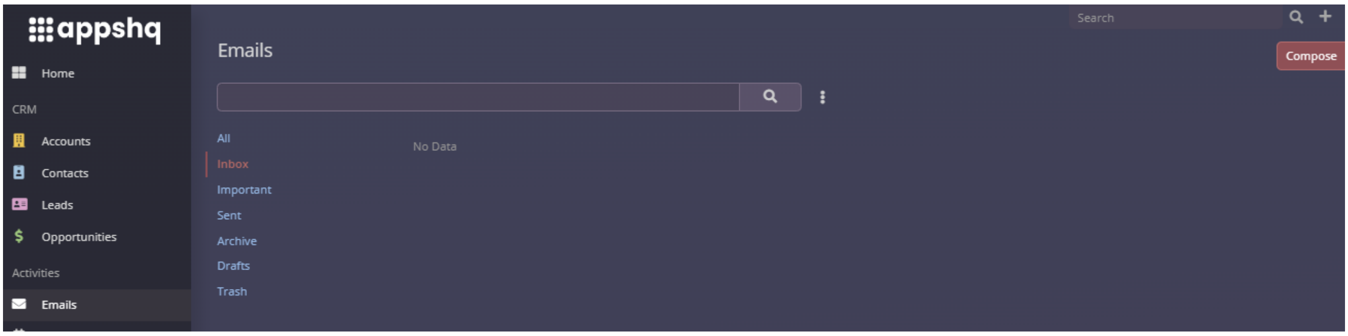
You will see a categorized list view of emails, meetings, calls, tasks, and other scheduled activities.

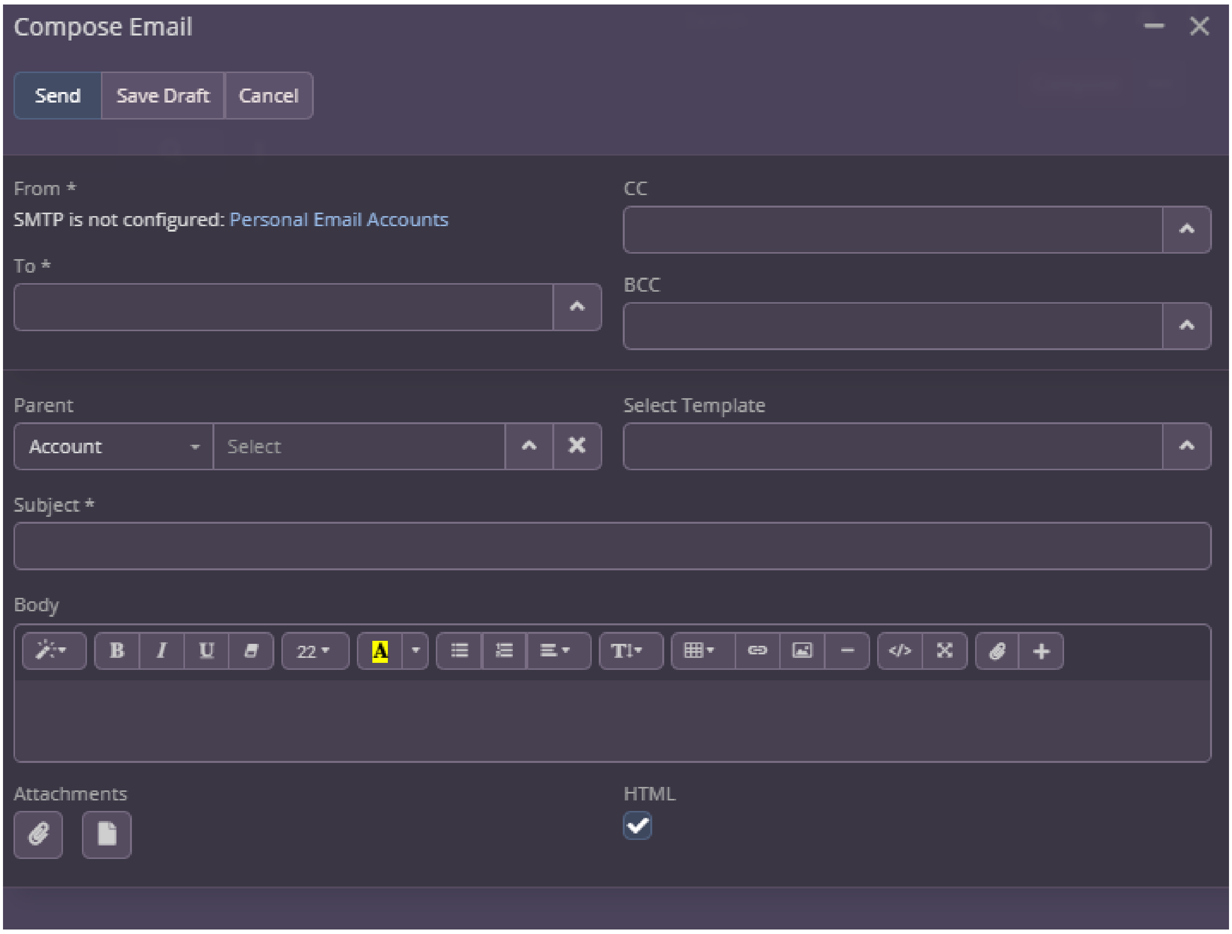
2. Managing Emails

Emails are a crucial part of client communication. The CRM allows you to send, receive, and track emails directly within the system.

Sending an Email:

1. Navigate to the **Emails** section under Activities.
2. Click the **+ Compose** button to create a new email.
3. Fill out the required fields:
   - **Recipient**: Add the email address of the contact or lead.
   - **Subject**: Enter a subject line.
   - **Message Body**: Write your email content.
4. Attach any necessary files.
5. Click **Send** to deliver the email.





Tracking Emails:

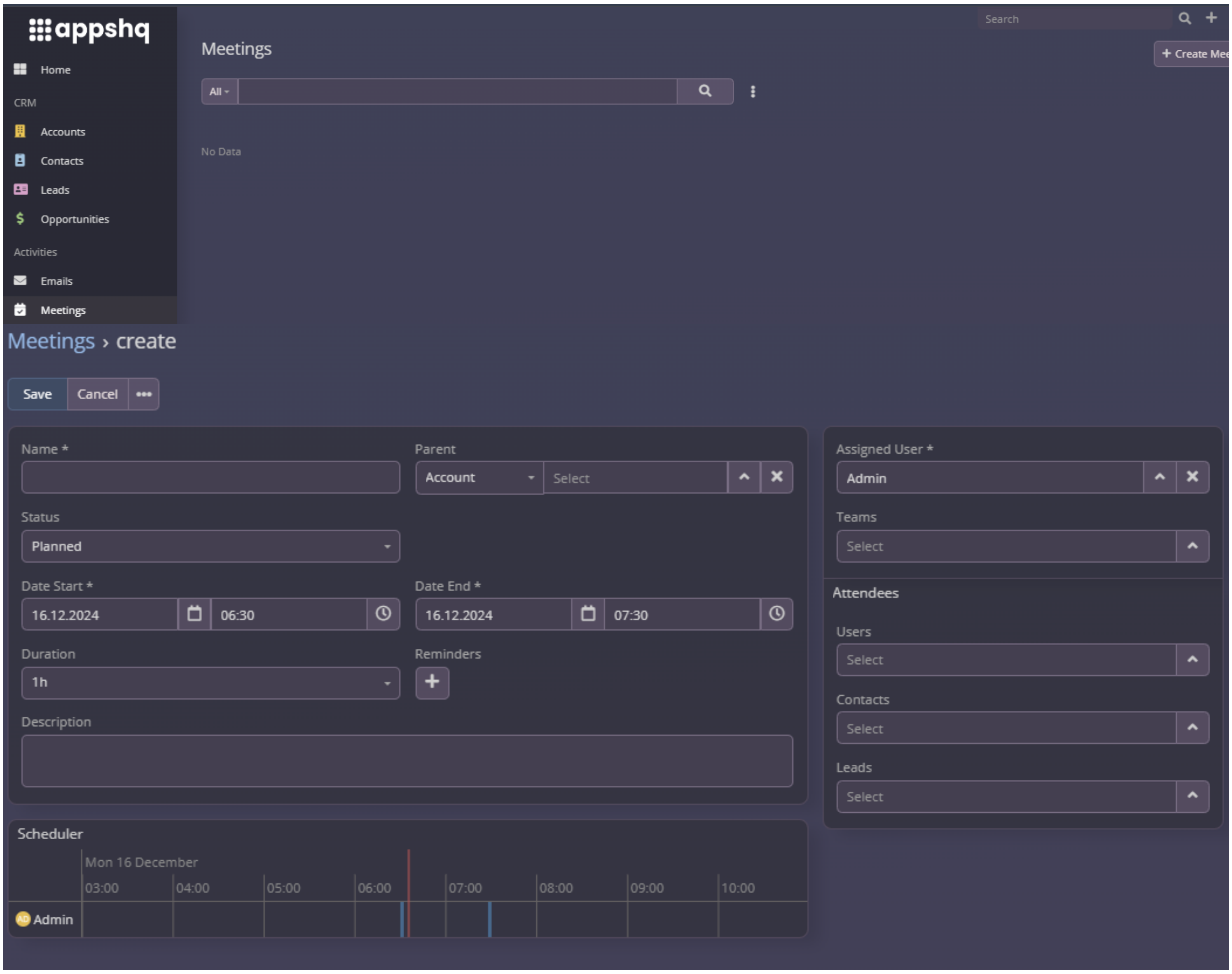
- Sent and received emails are automatically linked to the associated contact, lead, or opportunity for easy tracking.
- Use the search bar to find specific emails by subject or recipient.

3. Scheduling and Managing Meetings

Meetings help you maintain direct communication with clients or team members. The Meetings section allows you to create and track all scheduled appointments.

Creating a Meeting:

1. In the Activities module, navigate to the **Meetings** section.
2. Click the **+ Create** button.
3. Fill out the meeting details:
   - **Title**: Add a descriptive title for the meeting.
   - **Date and Time**: Specify the start and end times.
   - **Participants**: Add attendees from your contacts or team members.
   - **Location**: Enter the meeting venue or provide a video conferencing link.
4. Save the meeting.



Managing Meetings:

- View upcoming meetings in the **Calendar** section.
- Reschedule or update meeting details by opening the meeting record and clicking **Edit**.
- Mark meetings as completed once they are finished.

4. Logging and Tracking Calls

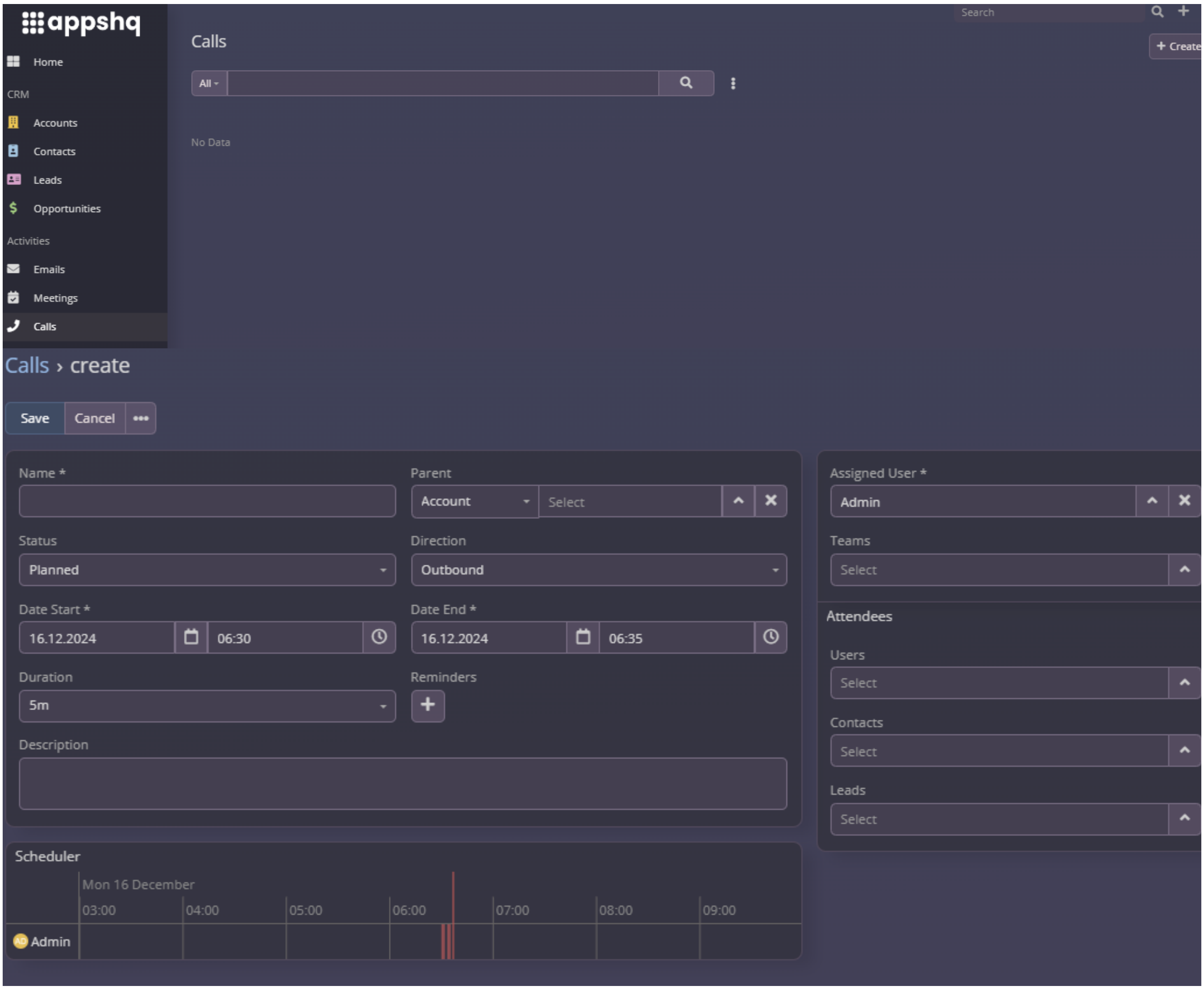
Calls are essential for follow-ups and quick resolutions. The Calls section allows you to log both completed and scheduled calls.

Logging a Completed Call:

1. Navigate to the **Calls** section under Activities.
2. Click the **+ Create** button.
3. Enter the following details:
    - **Subject**: Add a title for the call.
    - **Date and Time**: Specify when the call occurred.
    - **Duration**: Record how long the call lasted.

- **Notes**: Summarize the conversation.

4. Save the call record.



Scheduling a Call:

1. Follow the same steps as logging a call but set the call status to **Scheduled.**
2. Assign a reminder to ensure timely follow-up.

5. Managing Tasks

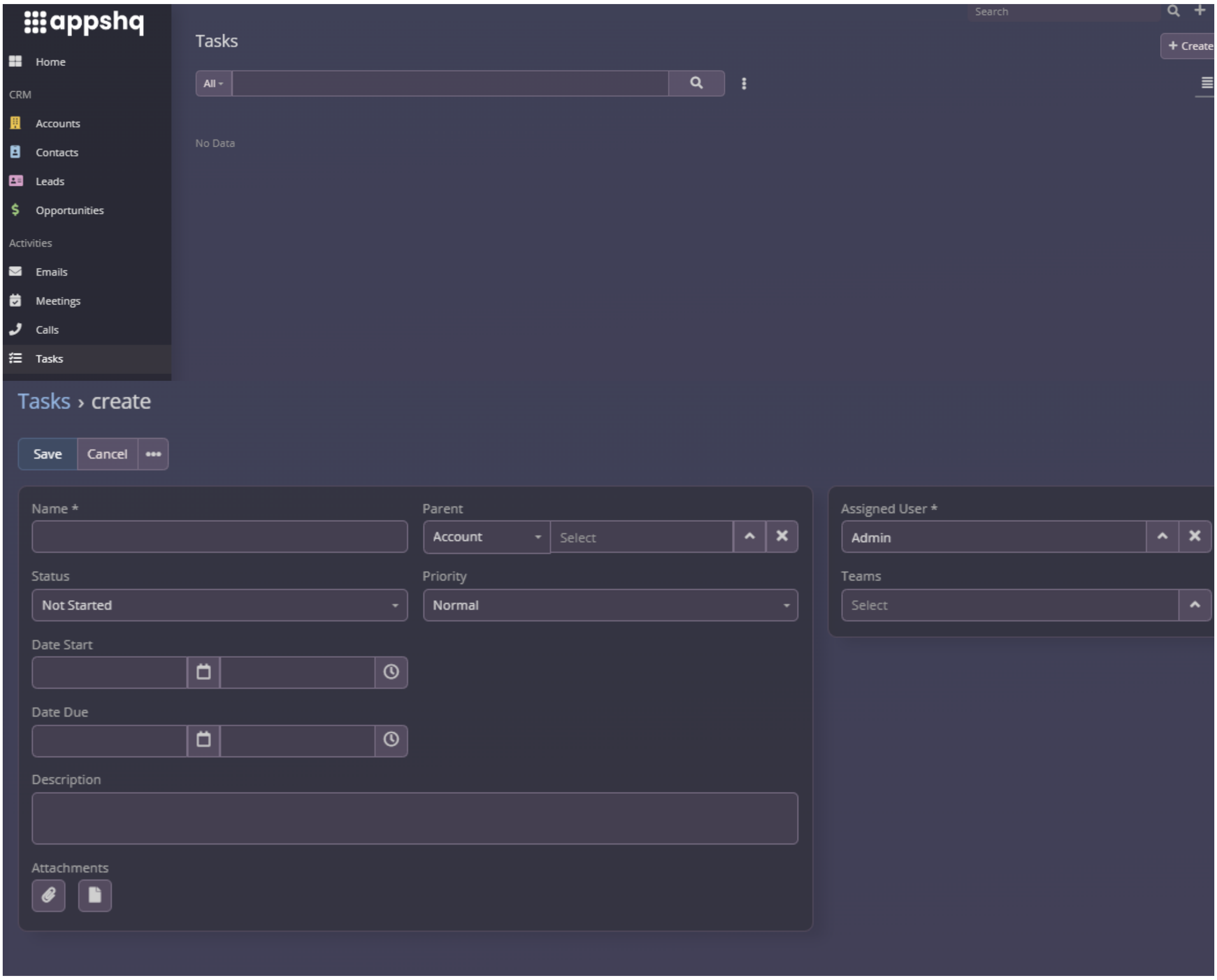
Tasks help you stay on top of to-dos and deadlines. The Tasks section allows you to create, assign, and monitor progress.

Creating a Task:

1. Navigate to the **Tasks** section in Activities.
2. Click the **+ Create** button.
3. Fill out the task details:
   - **Subject**: Describe the task.

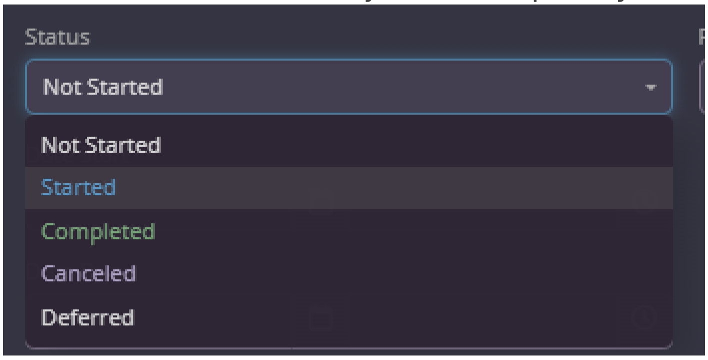
- **Due Date**: Specify the deadline.
- **Priority**: Set the priority level (e.g., Low, Medium, High).
- **Assigned User**: Assign the task to a team member.

4. Save the task.



Tracking Task Progress:

- Mark tasks as **In Progress** or **Completed** as you work through them.
- Use filters to view tasks by due date, priority, or assigned user.



6. Using the Calendar

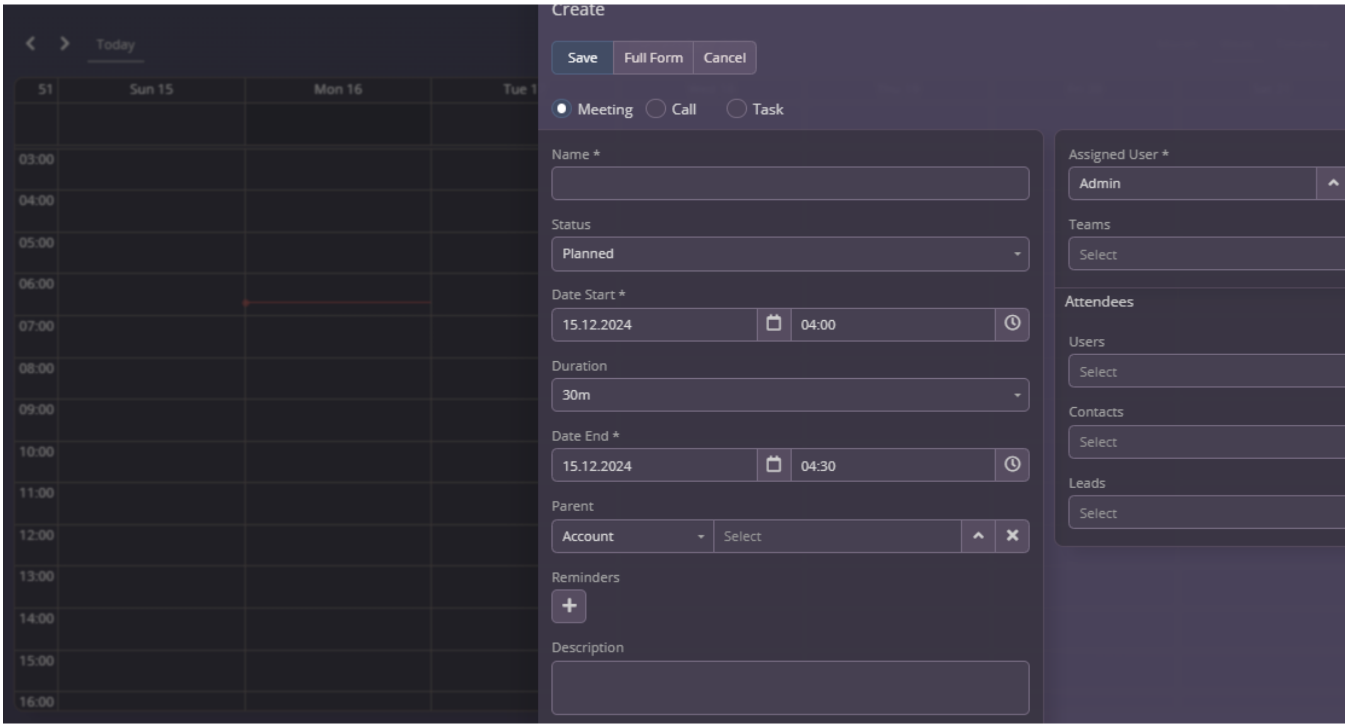
The Calendar provides a centralized view of all scheduled activities, including meetings, calls, and tasks.

Accessing the Calendar:

1. Navigate to the **Calendar** section in the main menu.
2. Use the **Day, Week, or Month** views to customize your display.

Adding Events to the Calendar:

- Any meeting, call, or task scheduled in the Activities module is automatically added to the calendar.
- You can also create events directly in the calendar by clicking on a specific date and time slot.



7. Best Practices for Managing Activities

- **Set Reminders:** Use reminders to ensure no activity is missed.
- **Prioritize Tasks:** Focus on high-priority items to stay efficient.

- **Document Everything:** Keep detailed records of calls, emails, and meetings for future reference.
- **Collaborate:** Assign tasks and share meeting schedules with team members to enhance coordination.
- **Use Filters:** Leverage filtering options to focus on specific types of activities or timeframes.

By mastering the Activities module, you can stay organized, improve communication, and ensure all tasks and interactions are completed on time. For additional assistance, contact our support team or refer to the full ResellPortal CRM documentation.

Revision #1
Created 16 December 2024 06:28:30 by Admin
Updated 16 December 2024 06:41:06 by Admin