

Activity Priority

Module Guide: Activity Priority

Module Location

Settings > CRM > Activity Priority

Module Purpose

The **Activity Priority** module is used to define the level of importance or urgency of an activity within the CRM. The goal is to standardize priority levels (e.g., High, Normal, Low) so that the sales team can easily identify and work on the most crucial activities first.

1. Main View (Activity Priority List)

The main page displays all the priority levels that have been configured in the system.

View Explanation

- **Search Filter:** Allows for a quick search based on the priority name.
- **List Table:**
 - **No.:** Serial number.
 - **Activity Priority Name:** The descriptive name of the priority level.

- **Order:** A number that determines the rank of the priority (e.g., 1 for the highest).

- **Action Buttons:**

- **New Activity Priority:** Opens the form to create a new priority level.
- **Delete:** Deletes the selected priority.

2. Add Activity Priority Page

This form is used to add a new priority level to the system.

View Explanation

- **Activity Priority Name:** A field to enter the name of the priority level (required).
- **Order:** A dropdown selection to determine the ranking or order of the priority.
- **Buttons:**
 - **Save:** To save the new priority data.
 - **Cancel:** To cancel the process.

3. Steps to Add a New Activity Priority

1. From the main page, click the **New Activity Priority** button.

2. Fill in the **Activity Priority Name** (e.g.,)
3. Choose the appropriate **Order** (e.g., for the highest priority).
4. Click the **Save** button.

4. Integrated Workflow & Business Process

- **Task and Time Management:** When creating or scheduling an activity in the CRM (e.g., the task "Call prospect A"), users can assign a priority level from the list created here.
- **Sorting and Filtering:** In the CRM task list (To-Do List) or calendar, users can sort or filter activities by their priority. This helps them focus on "High" priority tasks first.
- **Escalation and Reporting:** Management can easily monitor high-priority activities that have not been completed or are past their due date, allowing for intervention or escalation if necessary.

5. Tips & Important Notes

- Use common and easily understood priority terminology, such as , , and .
- The **Order** field is crucial for sorting functionality. Ensure you set it logically (e.g., the lowest value for the highest priority).
- Keep the number of priority levels simple. Too many options can make the system complicated and defeat its main

purpose.

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