Activity Status

Module Guide: Activity Status

Module Location

Settings > CRM > Activity Status

Module Purpose

The **Activity Status** module is used to define the result or final state of an activity recorded in the CRM. Its purpose is to standardize status options (e.g., Planned, Completed, Canceled, Postponed) so that the sales team can consistently mark the progress or outcome of each activity they perform.

1. Main View (Activity Status List)

The main page displays all activity statuses that have been configured in the system.

View Explanation

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

    - **Order**: A number that determines the display order.
- **Action Buttons**:
    - **New Activity Status**: Opens the form to create a new status.
    - **Delete**: Deletes the selected status.

2. Add Activity Status Page

This form is used to add a new status that can be selected when managing CRM activities.

View Explanation

- **Activity Status Name**: A field to enter the name of the status (required).
- **Final Status**: A very important checkbox. If checked, this status will be considered a final status that "closes" an activity (e.g., Completed or Canceled). If unchecked, the activity will still be considered "open" or "in progress."
- **Order**: A dropdown selection to determine the display order of the status.
- **Buttons**:
    - **Save**: To save the new status data.
    - **Cancel**: To cancel the process.

3. Steps to Add a New Activity Status

1. From the main page, click the **New Activity Status** button.
2. Fill in the **Activity Status Name** (e.g., `Completed`).
3. Check the **Final Status** box if this status indicates that an activity has ended.
4. Choose the appropriate **Order**.
5. Click the **Save** button.

4. Integrated Workflow & Business Process

- **Task Management**: When a sales representative records an activity (e.g., a `Follow-up Call`), they will mark the activity with one of these statuses. For example, initially, the status is `Planned`, and after it is done, it is changed to `Completed`.
- **Activity Lifecycle**: The `Final Status` flag controls the lifecycle of a task. An activity with a status not marked as "final" will continue to appear on the user's to-do list. Once the status is changed to a "final" one, the activity is considered complete and may disappear from the active task list.
- **Productivity Reporting**: Management can create reports to see how many activities were successfully completed, how many were postponed, and how many were canceled by the sales team. This helps in measuring team productivity.

5. Tips & Important Notes

- Create a list of statuses that is simple and intuitive. Common examples are `Planned`, `In Progress`, `Completed`, `Postponed`, and `Canceled`.
- The use of the **Final Status** checkbox must be well understood. Ensure that only statuses that truly end a task (such as `Completed` and `Canceled`) are marked as the final status.
- This module, along with **Sales Stage** and **Activity Type**, forms a complete work system for activity management within the CRM module.

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