Activity Type

Module Guide: Activity Type

Module Location

Settings > CRM > Activity Type

Module Purpose

The **Activity Type** module is used to define and categorize the types of activities performed by the sales team when interacting with prospects or customers. The purpose is to standardize the logging of activities (e.g., Phone Call, Email, Meeting, Product Demo) so they can be tracked, scheduled, and analyzed in the context of sales opportunities within the CRM module.

1. Main View (Activity Type List)

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

View Explanation

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

    - **Order**: A number that determines the display order or priority.
    - **Sales Stage**: Indicates at which sales stage this activity is relevant or frequently performed.
    - **Send Email**: An indicator (likely a checkbox or Yes/No) that signals whether an automatic email template is triggered by this activity.
- **Action Buttons**:
    - **New Activity Type**: Opens the form to create a new activity type.
    - **Delete**: Deletes the selected activity type.

2. Add Activity Type Page

This form is used to add a new activity type to the CRM system.

View Explanation

- **Activity Type Name**: A field to enter the name of the activity (required).
- **Order**: A dropdown selection to determine the order.
- **Sales Stage**: A selection box (likely multi-select) to associate this activity with one or more stages from the **Sales Stage Module**.

- **Send Email**: A checkbox to enable the automatic email-sending functionality related to this activity.
- **Data**: A field to upload a default file or template that will be used when this activity is selected (e.g., an email template for the "Send Proposal" activity).
- **Buttons**:
  - **Save**: To save the new activity type data.
  - **Cancel**: To cancel the process.

3. Steps to Add a New Activity Type

1. From the main page, click the **New Activity Type** button.
2. Fill in the **Activity Type Name** (e.g., `Follow-up Call`).
3. Select the relevant **Order** and **Sales Stage**.
4. Check **Send Email** if this activity should trigger an email to be sent.
5. Upload a template file in the **Data** section if applicable.
6. Click the **Save** button.

4. Integrated Workflow & Business Process

- **CRM Activity Management**: When the sales team logs or schedules activities for an opportunity, they will select from

the list of Activity Types created here.

- **Process Automation**: The "Send Email" feature allows for automation. For example, when a sales representative schedules a "Send Demo Invitation" activity, the system can automatically send an invitation email based on the uploaded template.

- **Sales Performance Analysis**: Management can analyze the data to see which activities are most effective in moving a deal to the next stage. For example, "How many 'Product Demos' successfully converted to 'Negotiation'?".

- **Guidance for the Sales Team**: By linking activities to sales stages, the system can provide guidance to the sales team on what activities are recommended at each stage.

5. Tips & Important Notes

- Create a list of activity types that is concise yet covers all the main activities of the sales team. Avoid creating a list that is too long and confusing.

- Utilize the **Sales Stage** column to build a logical workflow. For example, the "Initial Contact" activity might only be relevant in the "Prospecting" stage.

- The **Data** feature is very useful for standardizing communication. Upload proposal templates, brochures, or standard email content to ensure all teams use uniform and up-to-date materials.

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