Activity Management

Activity Management (Campaign Management or Call Centre modules) allows the User to conduct all Activity related functions.
If you wish to create an Activity your first need to create a Campaign whichs mean you must have created an Account previously.

1. View Account Activities

By selecting the Activity Management button, the User will be presented with a table of the Activities and summary information of Activities in the currently selected account.

This table will only display Activities which the User has permissions to View.

Note:
If access is needed for an Activity that is not in this list, contact the application Administrator to change the Users privileges.

2. View All Activities

When viewing the Account Activities you can choose to display the Activities for all Accounts option.

This table will only display Activities which the User has permissions to View.

Note:
If access is needed for an Activity that is not in this list, contact the application Administrator to change the Users privileges.

3. Search for an Activity

There are 2 methods to search for a Activity. The first is on the Banner Section using the Global Search function. (see Global Search section)

The other method offers more fields and options to refine the search and can be accessed by selecting Activity Management from the Menu Bar then selecting Search Activities from the

Left Menu Section.

The User can search for a Activity or a list of Activities by filtering on the following criteria:

Displays:

- Account
- Campaign
- Activity No.
- Activity
- Status
- Step
- Start Date
- End Date

4. Create an Activity

If the User has Create Activity privileges, then this option is available in the Left Hand Menu.

> **Note:**
> If access is needed, contact the application Administrator to change the Users privileges.

All required fields are in **bold**

Field	Description
Campaign	The Campaign for the new Activity
Activity	Activity name
Channel	The Communication Channel for this Activity
Status	Account status, either Active or Void
Description	Description of the Activity
Start Date	The Date this Activity is due to start
End Date	The Date this Activity is due to end
Reference Code	An external Reference Code for this Activity
Budget	The Budget allocated to this Activity
Cost to Date	The current total of costs incurred for this Activity

Table 1:

If you select a channel when creating the Activity you will then be able to edit the Channel details from the the Channel tab.

5. Add an Activity Note

Notes can be used to store additional or background information. The User can create a Note by selecting the Add Note link in the Left Menu Section.

6. View an Activity

6.1. Customer Lists tab

Customer Lists tab - view all Customer Lists for an Activity

Displays:

- List Name
- Description
- List Source
- Customers in List

6.2. Fulfilments tab

Fulfilments tab - view all Fulfilments for an Activity

Displays:

- Customer
- List Name
- Type
- Date
- View/Edit/Delete Operations

6.3. Telemarket tab

Telemarket tab - view a Telemarket for an Activity

Displays:

- Telemarket
- Description
- Status
- Step

6.4. Channel tab

Channel tab - view a Channel for an Activity

Displays:

- Name
- Description
- View/Edit Operations

6.5. Notes tab

Notes tab - view all Notes for an Activity

Displays:

- Date Note was created
- Date Note was updated
- Short description
- View/Edit/Delete operations

7. Edit an Activity

This function is accessible from the Left Menu Section. It allows the User to change and update any Activity details.

When editting the Activity you can select/unselect a Channel. The Channel details can then be edited from the Channel tab.

> **Note:**
> Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

8. Delete an Activity

> **Note:**
> USE THIS FUNCTION WITH CAUTION. Activities can be deleted but this has the affect of deleting ALL related Fulfilments. It would be an extreme case where an Activity would be deleted, and if in doubt, use Edit Activity to change the activity status to Void. THIS ACTION CANNOT BE UNDONE.

> **Note:**
> Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

9. Add or Remove a Customer List

This option allows you to associate a Customer List with an Activity. This allows you to target these Customers for this Campaign and easily search for them when creating Fulfilments and Responses.

> **Note:**
> This option is only available if the current user has the Update Activity and Update Customer List permissions. This option also disappears once the Activity has been Started. (See Change Step for more details)

10. Add or Remove a Telemarket Activity

This option allows you to associated a Telemarket with an Activity. This will allow you to search an Activities Customers when creating a Customer Response to the Telemarket.

> **Note:**
> This option is only available if the current user has the Update Activity permission. This option also disappears once the Activity has been Started. (See Change Step for more details)

11. Changing the Activity Step

An Activity can be in one of three Steps. This option allows you to change the current step to one of the following.

Steps

- Pending - When the Activity is in this step Customer Lists and a Telemarket can be assigned to the Activity
- Started - When the Activity is in this step Customers can be Fulfilled and Telemarkets Responded too.
- Finished - When the ACtivity is in this step Customer Lists and Telemarkets can not be assigned. Also Fulfilments and Responses can not be created for this Activity/Telemarket.

During the transitions between steps Customers are indexed so they can be searched more easily when Creating Fulfilments and/or Telemarket Responses. (This may take some time if the Activity has a large number of Customers in associated lists)

> **Note:**
> This option is only available if the current user has the Update Activity permission.

12. Create or Edit an Activity Fulfilment

This option allows you to search for customers in this Selected Accounts "Started" Activities and Customer Lists.
After searching you click the "Create/Edit Fulfilment" link next to the desired Customer in the results. This displays a screen with the input fields below.

Note:
Only Activities which have been "Started" can be searched. It is possible to Fulfil a Customer that is not associated with an Activity by searching without an Activity selected.

All required fields are in **bold**

Field	Description
Activity	The Activity for this Fulfilment
Reference Code	The Reference Code of the selected Activity
Customer	The Customer for this Fulfilment
Date	The Date this Fulfilment was made
Type	A description of why this Fulfilment is being created

Table 1:

Note:
This option is only available if the current user has the Create Fulfilment permission.