

SAP CRM - ACTIVITY MANAGEMENT

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Activity management in CRM is used to administer the activities assigned to employees in an organization. The data in an activity is a very important source of information for all the employees that are relevant for that information.

Activities in CRM are used to record sales activities. Some other common activities also include emailing or a telephone call or a customer visit or a follow up call, request to set the status to complete etc. in the CRM lifecycle. Appointments, interactions logs can be marked as private. You can also create activities as subsequent documents for a wide variety of other business transactions, such as opportunities, leads, sales orders, or contracts.

Activity management can be performed at any time during CRM lifecycle. When a customer contract is about to expire, you can make a telephone call to the customer (activity) as a follow up document to remind the employee responsible to make the follow up call to the customer and to check if they are willing to renew the contract.

You can easily integrate activity management with CRM Mobile and also with emails i.e. Microsoft Outlook or IBM Lotus Notes. This allows employees to connect to the sales cycle and to keep a track of the appointments and activities.

To attach fact sheets with activities, this can be done by going to **SPRO** → **IMG** → **CRM** → **Transactions** → **Settings for Activities** → **Attach Fact Sheet to Activities**



Activity Management for Employees

In an organization, the employees can perform the following actions in activity management –

- An employee can create activities like appointments or interaction details to document all their interactions with the customer.
- They can create tasks that help to manage their workload.
- They can access the fact sheet for valuable information about accounts.
- They can monitor activities using the worklist and search facilities.
- They can create activities from campaign response recording in CRM Marketing.
- They can view appointments and activities in the calendar.