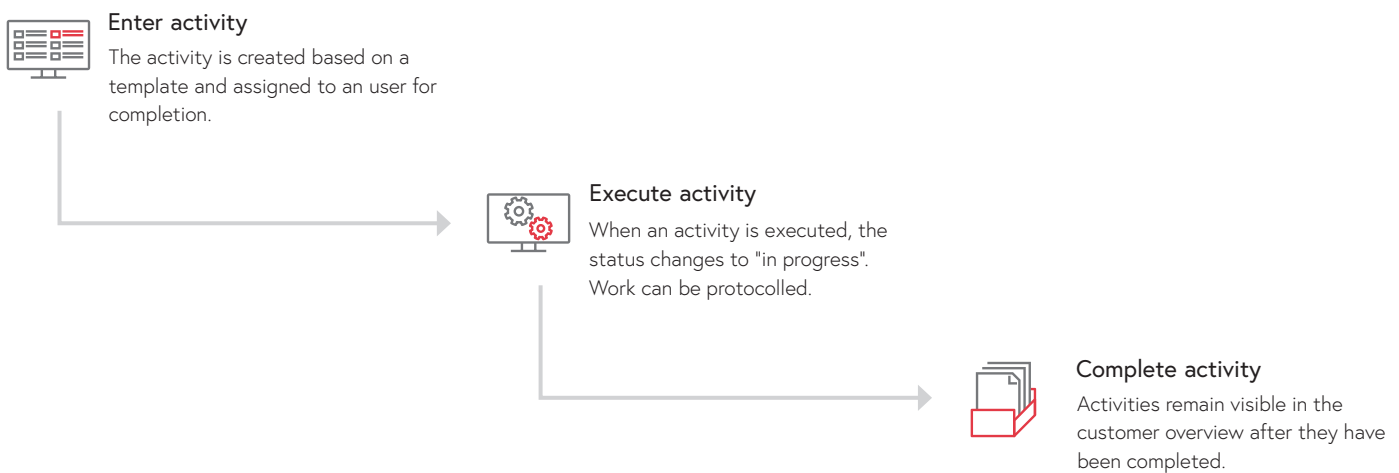


Activity Management

Organize customer relationships with Abacus Activity Management

Process overview: Activity Management



Activity Management allows you to monitor your customer relationships. Enter all activities directly in the customer overview and send letters, e-mails and appointments conveniently from Abacus CRM.

Manage activities

Abacus Activity Management enables you to efficiently coordinate all activities relating to your customer relationships. Activities are logged directly in the customer overview. You can use activities to create simple tasks, periodic processes and internal checklists. Letters, e-mails and appointments can also be sent directly from the CRM. All events are documented for a customer or an address.

Each activity is assigned to a processor, so that responsibility is clearly defined. The status of an activity allows you to keep track of tasks that are still outstanding or have already been completed. User-specific overviews and e-mail notifications ensure that no activity is forgotten.

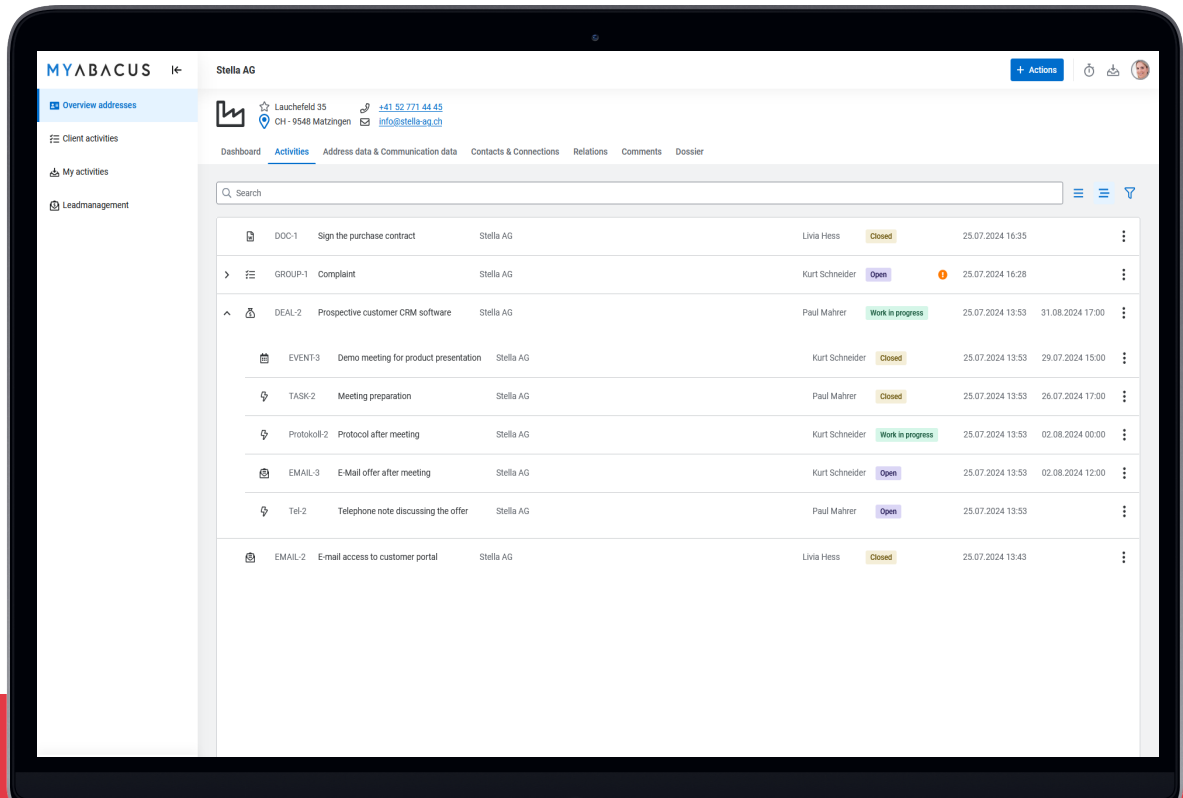
Group activities can be used to summarise several activities. This makes it easy to map complex processes with different tasks and responsibilities.

Evaluations

Dashboards and evaluations enable a comprehensive analysis of all activities across various Abacus programs. The activities in Activity Management can be analysed using simple selections.

Integration into the various Abacus applications

Abacus Activity Management is integrated into various Abacus applications. Activities can also be linked to projects, orders, products, tenants, properties, etc. and displayed there.



Your benefits

- Transparent overview of all customer activities
- Analyses of the activities to be completed using dashboards & e-mail notifications
- Cross-application integration into Abacus Business Software
- Accessible anywhere via web browser with MyAbacus

More information can be found under: abacus.ch/activitymanagement

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