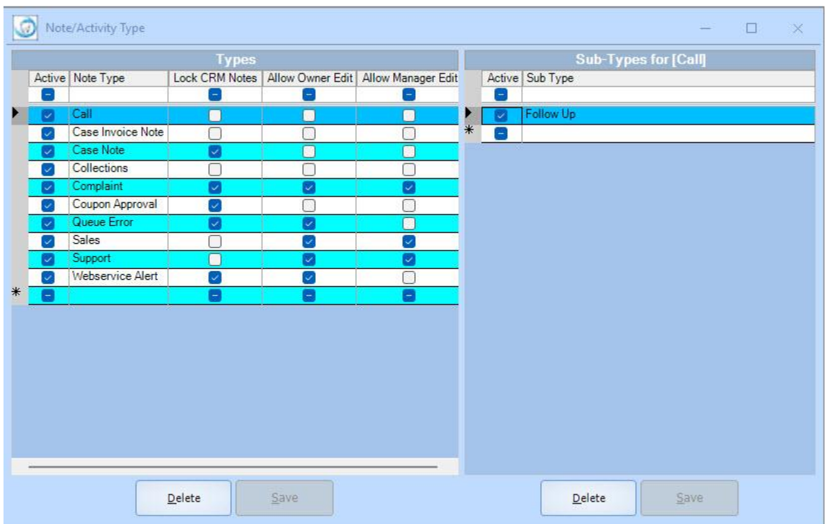
Evolution CRM: Note/Activity Types

Evolution's Customer Relationship Management (CRM) tools allow lab personnel to manage customer and prospective contacts in order to aid in customer acquisition and retention. A powerful feature within the CRM utilities is the ability to document every communication with each account.

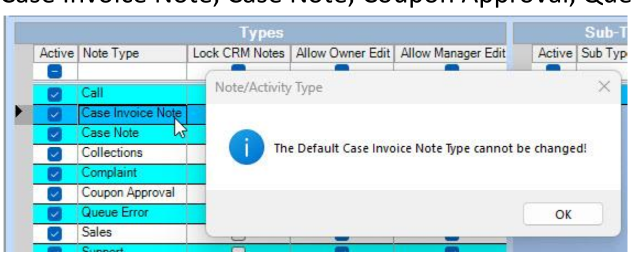
Most labs are familiar with the ability to add a "Call Note" to a case in the Case Inquiry form. Did you know that you can add these same types of notes to accounts directly? And did you know that you can define your own Note Types and Note Subtypes to use for these notes?

Define what your lab needs for your unique customer contact tracking and collect who said what, to whom, and when! And when you have this data, ABS has over a dozen pre-defined CRM Activities reports that can be added to your system for easy and accurate retrieval and monitoring.

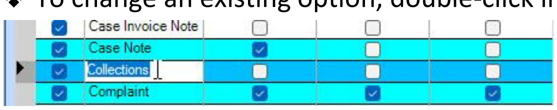
❖ Under the **CRM** menu, click the **Note/Act. Types** button to open the **Note/Activity Type** form:

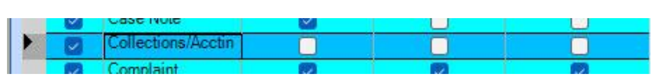


❖ Please note that there are currently five Types used by the system and which cannot be changed: Case Invoice Note, Case Note, Coupon Approval, Queue Error, and Webservices Alert.



❖ To change an existing option, double-click into the Note Type field, change the description, and Save.





❖ The options:

-**Lock CRM Notes** – Select this flag only if you want notes for this type to be un-editable. If this is not activated, then a note can be changed, added to, and even assigned/reassigned to different personnel.

-**Allow Owner Edit** – Select this flag only if the "Lock" is active, to allow each note to be edited by the user who created it.

-**Allow Manager Edit** – Select this flag only if the "Lock" is active, to allow each note to be edited by the Manager of the user who created it.

❖ To add a new Note Type, right-click in the **Types** section and select **Add New Type**.

❖ You can **Delete** a Type or Sub-Type that has never been used. If an option you no longer want to use cannot be deleted, remove the "Active" flag.

❖ Every Type may have one or more Sub-Types defined. First, select the Type for which you want to amend, right-click in the Sub-Types section, and select **Add New Subtype**. Name the sub-type and Save.