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# CRW035 Work with Action type

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## Overview

Action types are created and used when managing customers. Action types can be added for specific Customers, Sales Reps, ISBNs and Resources. Within each Action type actions are added. For example telephone may be an action type with a definition for follow up call using a questionnaire template as an action for this action type.

When using the full CRM module, the action types play the part of allowing the company to set up the actions which they would like Customer Service to carry out in CRM. For instance, if a customer calls and asks for someone to come out and visit them, Customer Service need to assign a task to internal staff to do the Client Visit, then you need to break that down into actions.

1. Assign a task to someone with a request to visit a client (This would be an action type which would potentially be linked to a template where the Customer Service person would fill in the client's name and what was required of the assignee.
2. The assignee would then pick up the task and would need to Action it by visiting the customer and possibly filling out an Opportunity Template by raising an action of Client Visit, filling in the details and completing it after his visit.
3. The Staff Member would then complete the Customer Service task of Client Visit.

The Action type specifies what action is to be done and is generally linked to a template. Templates can be automatic (attached to modules) which means that they display automatically somewhere or manual which means the user must access them on purpose.

Action types can be set up for General use by everyone or for a specific resource, customer or contact. So if an action type is set up for a Customer visit to a particular Customer then a unique template with fields specifically for that customer may be attached to that action type so when it is used the correct information is available to the Rep of staff member visiting.

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## Examples

This section illustrates examples concerning:

[Example 1: Add an Action type](#)

[Example 2: Work with Action Types](#)

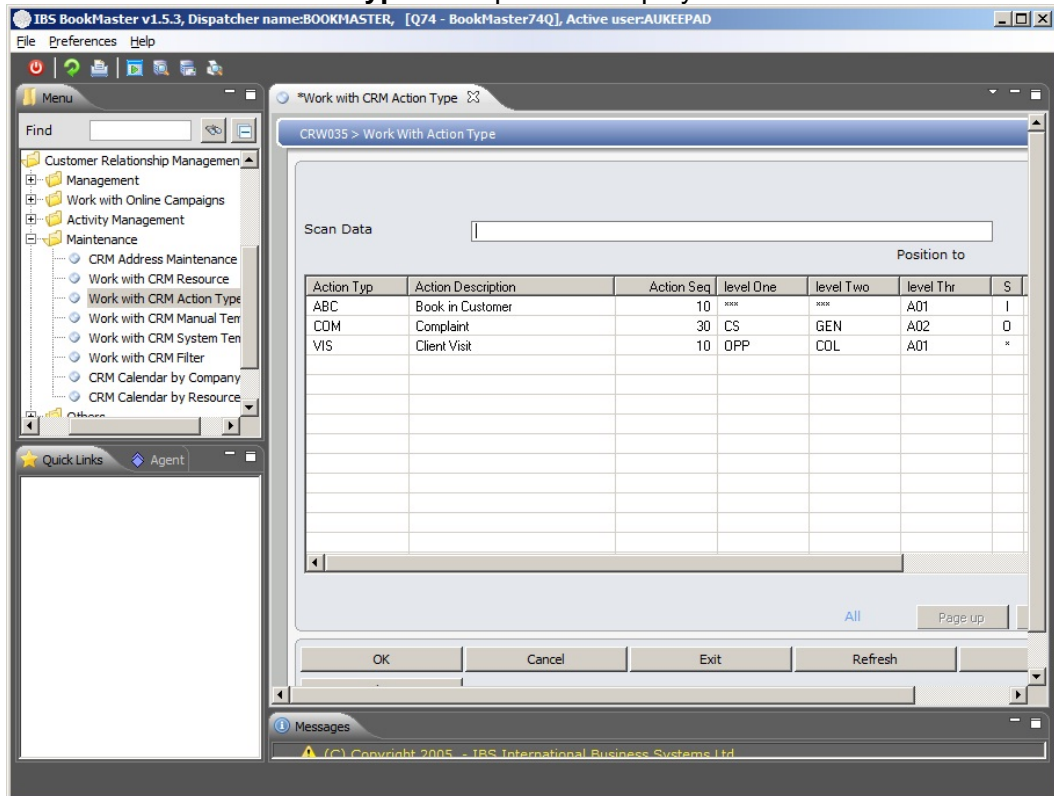
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### Example 1: Add an Action type

Work with Action Type menu option is used to add an Action, for example Client visit or making a phone call. These types of actions are added into the system.

1. Select option **Work with CRM Action Type** from Publishing Modules>Customer Relationship Management>Maintenance.

CRW035 Work with Action Type main panel is displayed.



This lists all action types to be performed.

## Functions

### Filter

Allows selection of resources by user type and user status.

## Options

### Change

Access Work with Action Type in change mode to maintain the action type definition.

### Copy

Access Work with Action Type in copy mode to copy an existing action type definition to a new one.

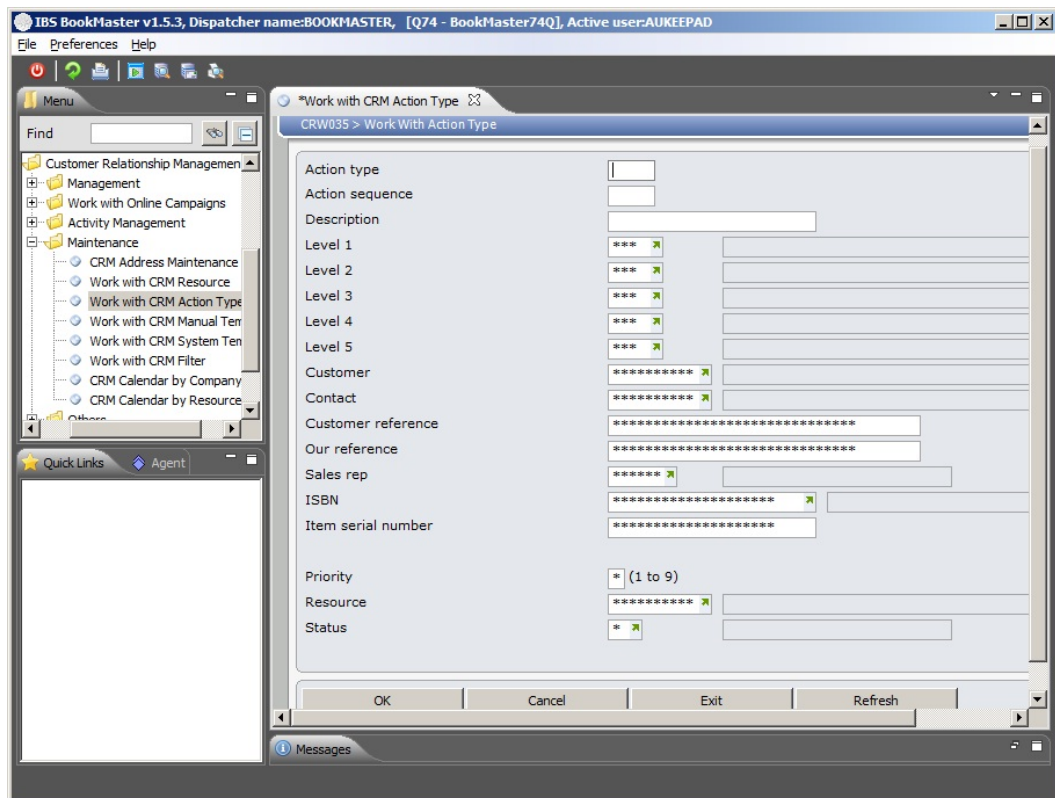
### Delete

Access Work with Action Type in delete mode to delete the action type definition.

### Display

Access Work with Action Type in Inquiry mode to enquire on the action type definition.

2. From the Action type list click **Add** and fill the mandatory field and press <ENTER>.



## Relevant Fields

**Action Type**

This is a code given to identify the action type being created.

**Action Sequence**

This is the sequence in which the action type will be used within the list of action types.

**Description**

This is a description of the action type.

**Level 1**

Incident level one determines the group the Incidents fall into. For example customer service, help desk, sales and marketing, seminars and training.

**Level 2**

Incident level two determines the type of incidents for level one. For example Online opportunities, Sales Opportunities, Telesales and General Queries.

**Level 3**

Incident level three determines the action to be taken for an incident. For example telephone call, email, follow up call, rep visit, copy invoice etc.

**Level 4**

Incident level four determines the incidents for level four. For example Agents opportunities, Budgets, Collections.

**Level 5**

Incident level five determines the incidents for level five. For example Editorial, Customer history etc.

**Customer**

This alphanumeric account number uniquely identifies a customer to the Distribution System.

**Contact**

This ID is an identification given to the contact being added to the contact file. This is the Contact for whom the Incident is being raised or for which an action type is being created. When running the match key rebuild enter the contact for which you want to rebuild the match key or leave blank to

	select all contacts to rebuild
<b>Customer Reference</b>	This is a reference given by the customer. This Customer reference can be used in the export to Excel.
<b>Our Reference</b>	A reference given to the incident being raised.
<b>Sales Rep</b>	The customer sales representative who deals with the Contact is added. This is the sales rep for whom the incident is being raised or for which an action type is being created.
<b>ISBN</b>	The ISBN the Incident is being raised for or for which an action type is being created. Titles can be added to a Campaign List. These are the Titles to be included in the campaign.
<b>Item Serial No</b>	The item serial number defined for the action type being created. This is used for the Electronic industry.
<b>Priority</b>	Prioritize the incidents by selecting a number in the range of 1 to 9.
<b>Resource</b>	In Work with Incidents this is the Owner of the incident which defaults to the user or operator creating the incident.
<b>Status</b>	Picked up from TMSCRM/ISS-STC which gives the status details such as Closed, Held, In progress, Opened, Rejected and Un Assigned for particular incident.

3. Click OK or Press ENTER to confirm.

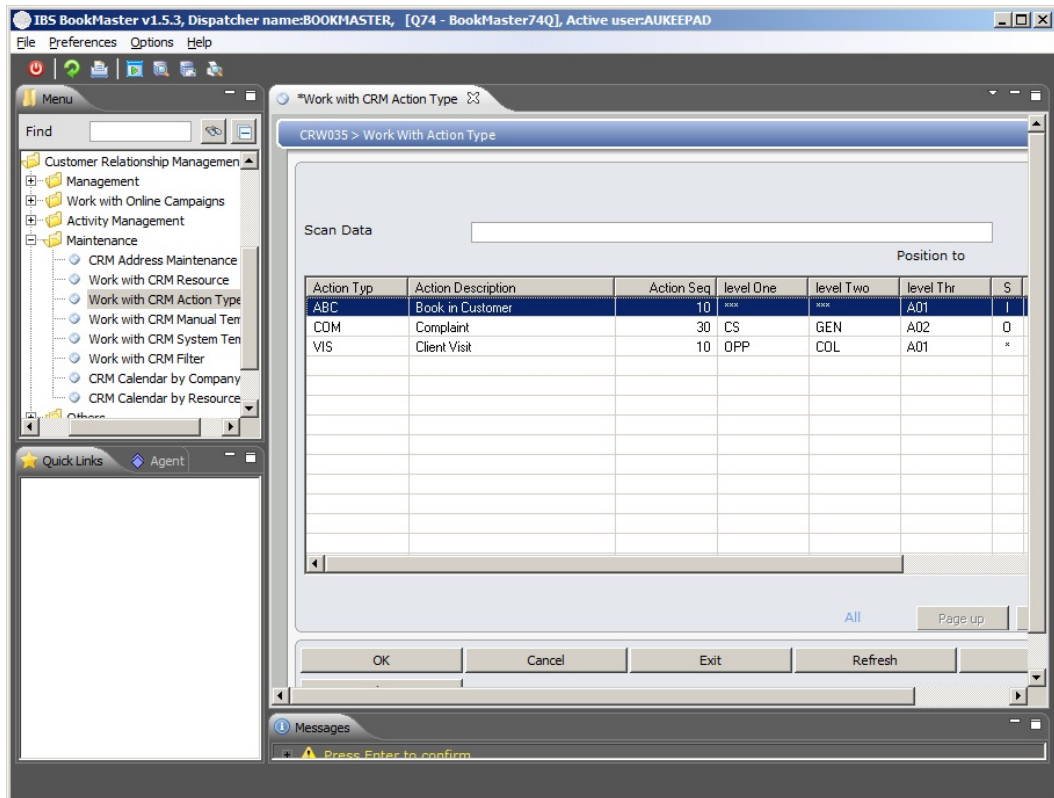
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## Example 2: Work with Action Type

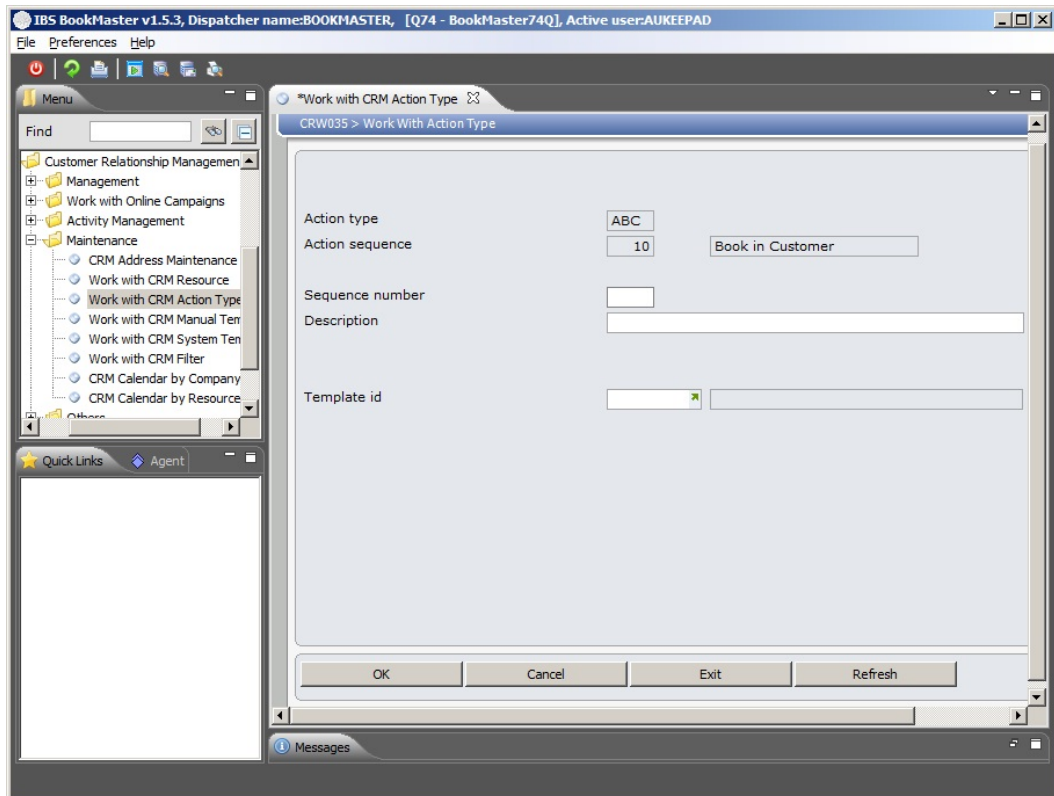
Work with Action Type menu option is used to add an Action, for example Client visit or making a phone call. These types of actions are added into the system.

1. Repeat step 1 from [Example 1: Add an Action type](#).
2. Select **Work with** option.

**CRW035 Work with Action Type** panel for adding attributes related to an action type is displayed.



3. From the Action list click **Add**.



### Relevant Fields

Sequence  
Number

This is the sequence in which the action will be used within the list of actions for the action type

Description

This is a description of the action type

Template ID

This is an ID given to the template being created. A search is available on the template ID to search for existing templates within the system

4. Press <ENTER> twice or click **OK** to confirm the addition of attributes related to an Action Type is added.