

# Customer Service Management in ACCTivate!

## Manage your customers' needs with the help of the Business Activity Module

### Don't lose important customer service information

Are you swamped with customer services issues? Do you lose track of comments and commitments? Do customers get angry when you can't find their information? Do you need a helping hand to sort it all out?

Your customers and their needs are too important to not be adequately addressed. **Start to manage your customer service issues with ACCTivate!**

### Keeping track of customer service activities is easy

When a customer calls, open their customer file and create a new Business Activity with the click of a button.

When the Activity window opens, begin to fill it out. Start by entering the appropriate code, status and priority according to your business requirements. Then record more detailed information in the description and discussion fields.

- This gives you a unique customer service record that is automatically linked to the customer's record.
- It becomes the central record for this particular customer service issue.
- Store both a brief description and a more lengthy and detailed discussion.
- Unlimited notes allow for a back-and-forth conversation to be held while recording the date, time and user who entered the note.

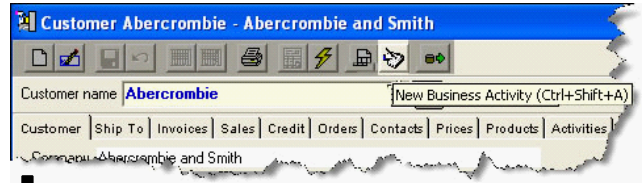
### A host of other features allow for powerful management

This system is a powerful tool to tie your customer service management together with other part of your system.

- Link other related items such as a specific **sales order, purchase order, customer, product** or even another **customer service issue**.
- Key dates can be assigned, including when an issue should be resolved, a **promised date** and an **appointment date**.
- Assign an activity to a specific user for follow-up.
- Assign the issue to the appropriate personnel and it will appear in their alerts (to-do) list.

### Don't put it off—start managing your customer service

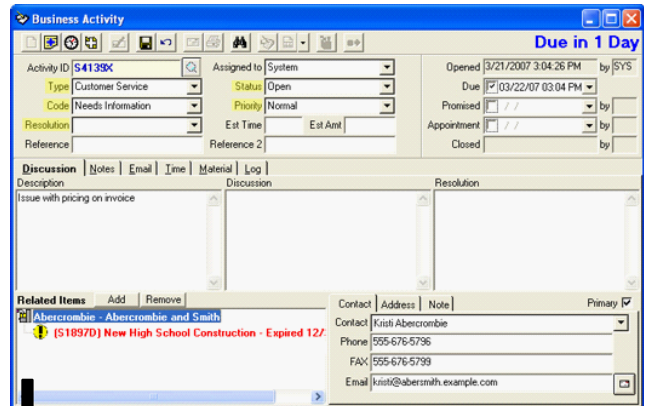
Stay organized and on top of your customer service issues and problems with the power of ACCTivate! and the Business Activity Management module.



#### A typical customer service issue:

Start in the customer's file (above) and create a new business activity.

The new business activity (below) has a link back to the customer's file.



#### Easily manage and track customer service issues:

The highlighted fields are examples of how a customer service issue can be managed in ACCTivate!

