

Moffice CRM Automated Activity Alerts

Introduction

Automated Activity Alerts are the best way to remind Reps of the important tasks they need to complete. Activity Alerts trigger with certain conditions for a contact during a set timeframe. If the conditions are met, the assigned Rep for the contact will receive a new Task in their To-Do Activities. There are currently four types of Activity Alerts that Moffice CRM supports:

	Service Renewal	New Customer	Win-Back	Customer Retention
Function	Sends the assigned Rep a Task in their To-Do Activities			
Target	For subscription-based Customers	For Potentials and/or Leads	For closed-lost Customers	For Customers, based on their Rating
Condition	Alerts the assigned Rep a certain number of days before their Customer's subscription will expire	Alerts the assigned Rep, after a certain number of days of inactivity, to initiate a sales Activity for a Potential and/or Lead	Alerts the Rep, after a certain number of days pass, to contact a previously closed-lost Customer again for possible win-back	Alerts the Rep, after a certain number of days/weeks/months pass, to contact a Customer for a meeting/call/email based on their Customer rating

How to: Use Service Renewal Alerts

These alerts are targeted towards Customers of your business who purchase products or services based on a subscription basis. When a Customer's subscription is up for renewal, this alert will trigger a certain number of days before the end date (number of days depend on your settings). Once the conditions are met for the alert, Moffice CRM automatically sends a task for the assigned Rep of the respective Customer as a To-Do Activity, reminding them to persuade the Customer for further service renewal.

The settings you need to adjust for Service Renewal Alerts is enabling the option (click the button to slide; a check means the alert is enabled) and deciding the number of days before expiration the alert will trigger.

Service Renewal Alert ▾

Service Renewal Alert



Days Before Expiration

Days

Days before the expiration, the assigned rep receives a new task for their To-Do Activities.

 Save

How to: Use New Customer Alerts

These alerts are targeted towards Potentials or Leads who have not been converted to a Customer yet. After the contact has been assigned a Rep, this alert will trigger when a certain number of days pass without any sales Activities being done for that contact.

The settings you need to adjust for New Customer Alerts is enabling the option for Potentials and/or Leads (click the button to slide; a check means the alert is enabled) and deciding the number of days of inactivity before the alert will trigger.

New Customer Alert ▾

Potential Inactivity Alert



Days

Days

If 20 days pass without any Activities, the Potential's Rep will receive a new [Task] in their [To-Do Activities] list.

Lead Inactivity Alert



Days

Days

If 14 days pass without any Activities, the Leads's Rep will receive a new [Task] in their [To-Do Activities] list.

 Save

How to: Use Win-Back Alerts

These alerts are targeted towards Customers who have been lost. When Customers are converted to Closed Lost Customers, Reps enter a follow-up date for possible win-back. This alert triggers a certain number of days before that follow-up date.

The settings you need to adjust for New Customer Alerts is enabling the option for Win-Back Alerts (click the button to slide; a check means the alert is enabled) and deciding the number of days before the follow-up date that the alert will trigger.

Win-Back Alert

Win-Back Alert



Follow-Up Date Deadline

14

Days

14 days before a customer's [Follow-Up Date], Reps will receive a new [Task] for their [To-Do Activities] list.

 Save

How to: Use Customer Retention Alerts

These alerts are targeted towards Customers with Ratings. Naturally, you'll want to put more effort into retaining Customers with higher Ratings to maintain your business' revenue and client base. This is when Customer Retention Alerts come in handy. First, enable the alerts with the button (a check means the alert is enabled). Then, decide how often you'll receive the alerts and subsequent Tasks in Reps' To-Do Activities. Finally, decide the number of meetings, calls, and emails for each rating grade that must be done during the time frame selected in Send Frequency. Keep consistent positive contact with Customers to build stronger relationships and retain their interest longer.

Customer Retention Alert

Customer Retention Alert



Send Frequency

Month Week Days

30

Days

To retain customers, Activities will be regularly sent as [Tasks] automatically to Sales Reps.

Rating

Rating	Activity		
	Meeting	Call	Email
BRONZE	0	1	1
SILVER		2	3
GOLD		3	3
DIAMOND	1	3	3
VIP	2	3	3

 Save