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Article # 1286

Technical Note: Maximizing the Customer and Vendor Activity Analysis Feature

Difficulty Level: Intermediate Level AccountMate User

Version(s) Affected: AccountMate 7 for SQL and Express

Module(s) Affected: SO, AR, PO, AP, CM

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DESCRIPTION

Every company wants better relationships with their customers and vendors. Building a high-quality relationship with them is easily facilitated when they are satisfied not only with the prices and quality of the products you are selling or buying, but also with the services you provide to them.

You can provide your customers and vendors with better service when you are familiar with their needs and can quickly and efficiently respond to these needs. You can do this by keeping track of your customers and vendors activities. This can be quite burdensome as most customers and vendors have countless activities over a certain period. It will be easy though if you a have repository where you can keep a record for each of your customers and vendors activities. AccountMate's Customer and Vendor Activity Analysis feature allows you to store, maintain, and track these activities.

This article discusses how to set up and take full advantage of the Activity Analysis feature. Utilizing this feature to its full capacity will help you easily record and track each customer's and vendor's activity. You can be fairly confident that no customers' special requests or vendors' special offers will be missed.

SOLUTION

A. Set up Activity Analysis feature

To set up the Activity Analysis feature, perform the following:

1. **Create Activity Type.** You can refer to the Online Help for the step-by-step procedure for creating an activity type. We recommend that you assign a status for the activity type. The activity status is important for tracking the activity's progress (e.g. Pending, Closed, On-going, or Hold status). This

procedure is often ignored by the user; thereby resulting in the creation of numerous activity types, some of which are used only occasionally. When this happens, the purpose of simplifying the tracking of customers and vendors activities is lost. You should, therefore, ensure that you also define the activity status when creating an activity type. The step-by-step procedure for creating an activity status is described in the Online Help.

2. **Assign Activity Rights.** To make them useful, you must also assign activity rights to appropriate users for all activity types set up in AccountMate. Using the Activity Type Maintenance and the Activity Right Maintenance functions you may grant users the right to view and update a particular activity type.

   a. **Type of Activity Rights.** You can assign the following rights to appropriate users:

      ➢ **Right to View.** Marking the View checkbox will allow selected users to view the activity type in the Customer Maintenance/Vendor Maintenance Activity tab.

      ➢ **Right to Update.** Marking the Update checkbox will enable selected users to add, delete, and edit the activity type in the Customer Maintenance/Vendor Maintenance Activity tab.

   b. **Set up activity rights during creation of Activity Type.** You can assign rights to users during activity type creation. You will find a list of users in the Activity Type Maintenance Activity Rights tab. Mark the View and Update checkbox for users to whom you want to grant rights.

   c. **Set up activity rights in Activity Rights Maintenance.** You can also set up activity rights using the Activity Rights Maintenance function if you did not set up the rights during activity type creation. Using this function, you can assign activity rights by groups, by individual users, or by activity type.

   d. **Activity Types and Rights Listing Report.** This report provides information about existing activity types and activity rights records. The information in this report will help you determine and verify which of these activity types and activity rights records are for your AR, SO, PO, and AP transactions.

B. **Record and Track Customer/Vendor Activities**

   1. **Record customer/vendor activities**. Users can add or delete activity types in the Customer/Vendor Maintenance Activity tab provided that they are granted the rights to update a particular activity type.

   2. **Provide notes and attachments about the recorded activities.** Complete and correct information about the customer and vendor activity is vital when making decisions and you can have this information conveniently available anytime.. Using the Activity Detail function, you or any authorized user can enter notes pertaining to the activity as well as attach related documents (e.g., price quotations if the activity involves price bargaining).

3. **Assign the status of the customer/vendor activities.** You must assign an activity status (e.g., On-going, Pending, or Closed) when you update your customers/vendors activities. The status that you can assign to an activity is set up in the Activity Type Maintenance function. Assigning a status to your activities will help you determine which activity needs most of your attention when you review your customers/vendors activities.

4. **Assign a contact person.** It is always an advantage to know the right person to contact when conducting an activity. Having this person in the records will be useful especially when several people in your company are involved in handling customer/vendor activities.

C. **Analyze Customer/Vendor Activities**

1. **Filter customer/vendor activities.** You can filter the customer/vendor activity records which will be displayed in the Customer/Vendor Maintenance Activity tab to show only those records that you consider necessary. You can define the filter criteria using the Activity Filter window which will be displayed when you click the Filter button in the Activity tab Filter area.

2. **Customer/Vendor Activity Report.** This report provides information about customers/vendors activities including each activity's entry date and time, the user who made the entry, activity type, status, contact person, description, and whether there is an attachment to the entry. This is very helpful when tracking activities involving each customer and vendor. This report also provides information that may help you make decisions involving granting discounts to customers or requesting discounts from vendors and getting into special arrangements with them.

Use the Activity Analysis feature to your advantage. Start keeping records of your customers and vendors activities and know how and when to respond.