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GUIDE

How to follow up on sales with activities and reminders



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> A sale is almost always lost in the same place: the 'I'll give you a call next week' that nobody wrote down. **Activities** in Fube's CRM are that note —a call, a meeting, a task— with a date, an owner and, if you like, an email alert so it doesn't depend on your memory.

And the important part: each activity is **attached to the customer, the lead or the opportunity**, so the history of the relationship builds itself while you work.

Before you start: the CRM is available from Business

Activities are part of the **CRM** module, which **is not included in either the free plan or Pro**. On those two plans, when you open CRM you'll see a screen explaining what it includes and offering you an upgrade; from **Business** you get it in full. What the module includes is in **activities and reminders**, and what each plan includes is in **pricing**.

Step 1 — Record the activity

Go to **CRM › Activities** and click **Create activity** —or press N—. Only two fields are required: the **type** and the **subject**.

The type says what kind of contact it was or will be: **Call**, **Meeting**, **Task**, **Email**, **Note** or **Other**. It doesn't change how anything works, but it's what later lets you filter and see on the dashboard what your month was made of.

The subject is the short title you'll see in the list and on the calendar. Write it as a sentence that will still be useful in six weeks' time: 'Follow-up call' is of little use; 'Confirm whether they approve the May quote' is.

Everything else is optional and worth filling in:

- **Scheduled date** — when it's due. Without it, the activity exists but doesn't appear on the calendar or count as overdue.
- **Duration (min)** — how long you expect it to take or how long it took.
- **Description** — the longer context.
- **Owner** — who does the follow-up. As well as sharing out the work, it's **who will receive the reminder alert**.

Step 2 — Link it to a customer, a lead or an opportunity

This is the field people skip most often and the one that gives value to everything else. You can link the activity to a **customer**, a **lead** or an **opportunity**, and with that the contact stops being a stray note and becomes part of the history of that relationship.

The rule of thumb: **attach it to the opportunity if you're closing a specific sale**, to the **lead** if they're not a customer yet, and to the **customer** for everything else (an issue, an after-sales call, a renewal).

Afterwards, in the list, the **Linked to** column tells you who each activity belongs to, and you can filter by it to piece together everything you've discussed with someone.

Step 3 — Add the reminder (and yes, it gets sent)

The reminder is set **when you create the activity**: the activity creation form has a **Reminder** section with an 'Add reminder' toggle and a 'Remind on' field. It's saved together with the activity, in the same operation, so there's no need to create it first and come back later.

You can add **one** when creating it. If you want several —one the day before and another two hours before, for example—, open the activity afterwards to edit it: there's a **Reminders** section where you choose the **date and time** in the picker and click **Add**, as many times as you like. It's also the only screen where you can see them all, each with its **Email** label and a grey **Sent** once it has gone out.

Two rules the form applies when you add one:

- The alert has to be **in the future**.

- If the activity is scheduled for a future date, the alert **cannot be later** than that date. An alert after the meeting is no use to anyone.

The alert arrives by email and as a notification within Fube, and it goes **to the owner** of the activity (or to whoever created it, if no owner is assigned). Fube checks for due reminders **every five minutes**, so allow for that margin and don't schedule it at the last minute.

The channel is always email. There's nothing to choose.

Step 4 — Work from the calendar

CRM › Activities › Calendar shows scheduled activities by day. It's the review view: you open it in the morning, see what's due and what's fallen behind, and close things off. Activities without a scheduled date don't appear here — only in the list.

Step 5 — Close it, and note what happened

An activity starts out as **Pending**. When you do it —or drop it— close it from its menu:

- **Complete** — opens a box asking for the **outcome**. You can leave it empty, but it's the field that turns your CRM into something people can read: ‘wants a revised 12-month quote’, ‘not answering the phone, try again in September’. The completion date is saved and the text appears in the **Outcome** column of the list.
- **Cancel** — for things that no longer need doing. It also asks you for a reason, which is optional.

In both cases, **any pending reminders for that activity are cancelled**: you won't get an alert about a call you've already made.

And this is one-way. Completing and cancelling can't be undone from the app: the edit form has no Status field you could use to set it back to Pending. If the follow-up comes back to life, the natural thing is to **create a new activity** —which also records that there was a second attempt— rather than trying to revive the old one.

Activities and notes are not the same thing

They look alike and are often misused:

	What it's for
Activity	Something that **happens on a date** and has an owner, a status and a reminder: a call, a meeting, a task
Note / follow-up	Something you **want to put in writing** that has no due date: an agreed condition, a preference, a standing alert

Notes live on the customer record and on the opportunity record, and they are covered in create a customer and manage the sales pipeline. If it has a date, it's an activity.

Edge cases and common mistakes

- **I'm not getting any reminders.** Check three things: that the reminder was **in the future** when you added it, that the activity is still **Pending** (if you closed it, its reminders were cancelled) and that the **owner** has an email address. Also bear in mind the five-minute sending window.
- **I can't find where to set the reminder.** It's in the creation form, in the **Reminder** section: turn on the 'Add reminder' switch and the date field appears. See step 3.
- **I set the reminder after the meeting time and it won't let me.** That's the rule from step 3: when the activity is scheduled in the future, the reminder has to fall before it.
- **I cancelled an activity by mistake.** It can't be reopened from the app; create a new one with the correct date.
- **I have 'lost' activities with no date.** Without a scheduled date they don't appear on the calendar or count as overdue on the dashboard. If it's something that needs doing, give it a day.
- **I downgraded my plan and stopped receiving reminders.** Reminders are only sent while the account has the CRM module active. When you get it back, any that were left unsent go back into the queue.

Frequently asked questions

Can I set more than one reminder on the same activity?

Yes, but not when creating it: only one fits at creation. Open the activity to edit it and add as many as you like in the **Reminders** section, each with its own date and time. They are all sent by email.

Who receives the reminder?

The activity's **owner**. If you didn't assign one, the person who created it.

Where can I see everything discussed with a specific customer?

Filter the activity list by the **linked** entity. There you'll find the calls, meetings and tasks for that customer, lead or opportunity, with their outcome.

Does the calendar show the whole team's activities?

It shows the ones you can see according to your permissions. Filter by owner to see just yours. How access is shared out is explained in **roles and permissions**.

Can the customer see the activities?

No. The entire CRM is internal to your team.

Log the next call before you hang up

Sales follow-up doesn't fail for lack of tools, it fails in the gap between hanging up the phone and noting down what comes next. Logging the activity right there, with its date and its reminder, is what means that three weeks from now it won't depend on you remembering. Activities are included from the Business plan upwards: check it out on **pricing** and, if it suits you, **create your account** and try it with your next call. First, you can see what **Fube's CRM** offers.

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