

CRM ACTIVITIES

RECENT ACTIVITIES

This is a list of Activities over the last 7 days.

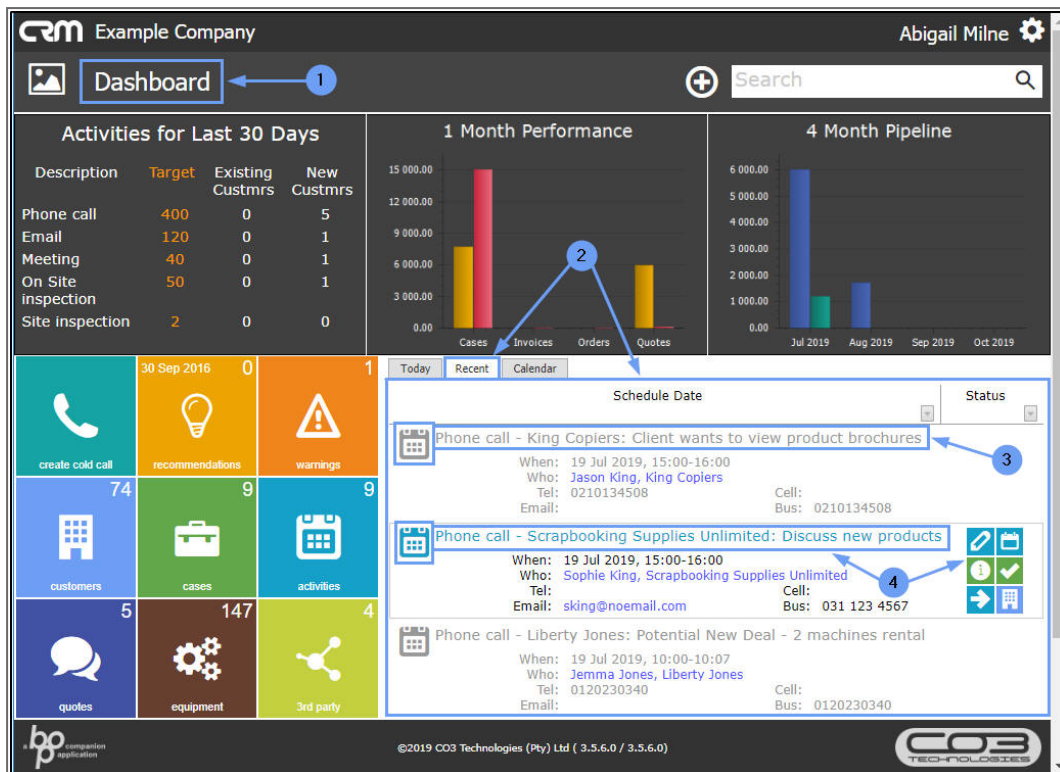
Ribbon Access: Webpage > `http://[servername]:[port-no]/BPOCRM/User.aspx`

SELECT THE RECENT TAB

1. In the **Dashboard** (Home page) screen,
2. Ensure that the **Recent** tab is selected to be able to view activities over the last 7 days.
3. If a recent Activity is completed, the activity heading and icon is feint (grey). You will not be able to access the Action buttons.

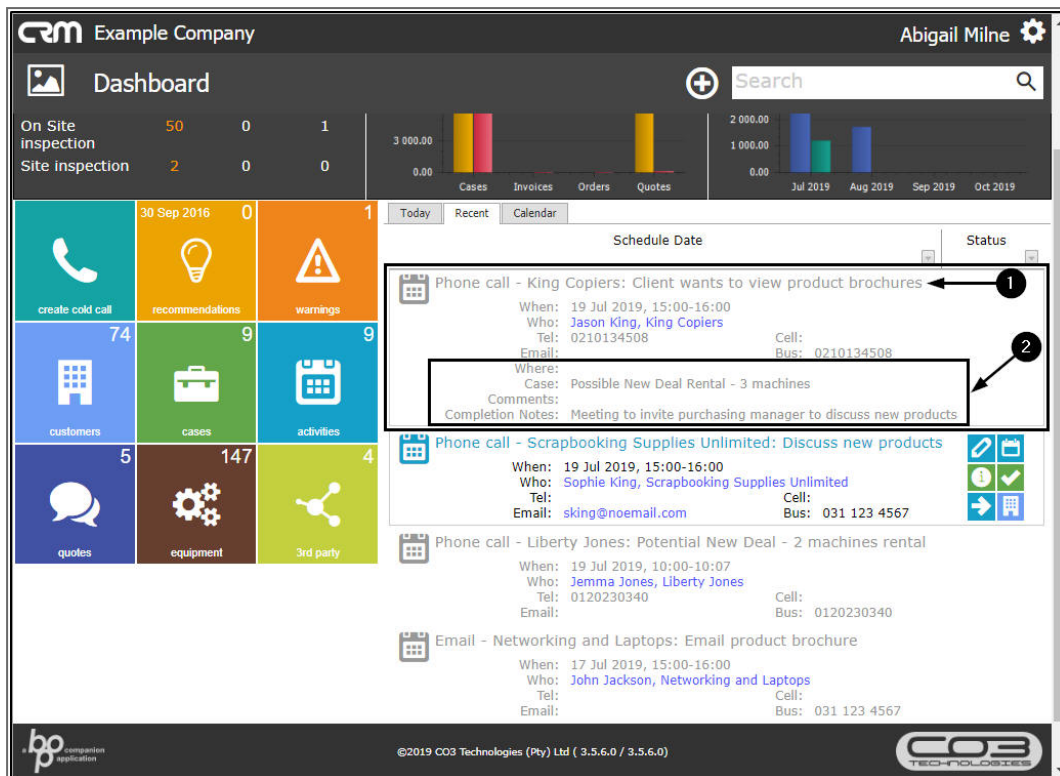
DISPLAY THE ACTION BUTTONS

4. If an activity is yet to be completed, then the header and icon will be bold (blue) and if you hover over the activity, the Action buttons will appear:
 - **View / Edit this Activity**
 - **Reschedule this Activity**
 - **View Case info and history**
 - **Close this case**
 - **Next Action** (close current activity and create new activity)
 - **View customer**



ACTIVITY QUICK VIEW SUMMARY

1. Single click on any activity.
2. To access a **quick view summary** of the activity information.



CRM Example Company | Abigail Milne

Dashboard

On Site inspection: 50, 0, 1
Site inspection: 2, 0, 0

Search: [Search]

Today | Recent | Calendar

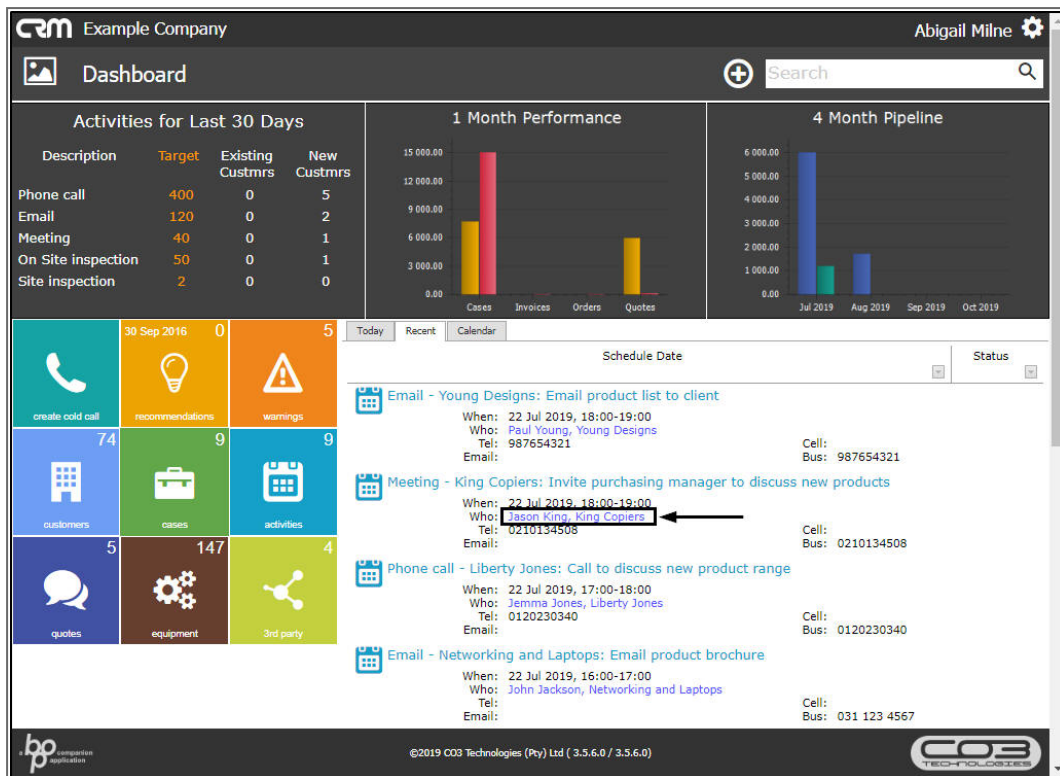
Recent Activities:

- Phone call - King Copiers: Client wants to view product brochures**
 - When: 19 Jul 2019, 15:00-16:00
 - Who: [Jason King, King Copiers](#)
 - Tel: 0210134508
 - Cell: 0210134508
 - Bus: 0210134508
 - Where: Possible New Deal Rental - 3 machines
 - Comments: Meeting to invite purchasing manager to discuss new products
 - Completion Notes: Meeting to invite purchasing manager to discuss new products
- Phone call - Scrapbooking Supplies Unlimited: Discuss new products**
 - When: 19 Jul 2019, 15:00-16:00
 - Who: [Sophie King, Scrapbooking Supplies Unlimited](#)
 - Tel: sking@noemail.com
 - Cell: 031 123 4567
 - Bus: 031 123 4567
- Phone call - Liberty Jones: Potential New Deal - 2 machines rental**
 - When: 19 Jul 2019, 10:00-10:07
 - Who: [Jemma Jones, Liberty Jones](#)
 - Tel: 0120230340
 - Cell: 0120230340
 - Bus: 0120230340
- Email - Networking and Laptops: Email product brochure**
 - When: 17 Jul 2019, 15:00-16:00
 - Who: [John Jackson, Networking and Laptops](#)
 - Tel: 031 123 4567
 - Cell: 031 123 4567
 - Bus: 031 123 4567

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NAVIGATE TO CUSTOMER DASHBOARD

- Click on the blue link in the **Who** field of any of the recent activities.



1. The selected **Customer Dashboard** screen will be displayed.
2. Here you can view the **Customer/Company details** and **12 Months Sales History**.
3. A panel of **Links** tiles can direct you to further information regarding this customer.



CRM.001.002

