

CRM ACTIVITIES

TODAY'S ACTIVITIES

This is a list of Activities that are due **today**, that you can follow up on and action directly.

As you work through your activities and complete them, they will be **removed** from the list.

All activities that were due on the current day, but <u>not</u> actioned, will show up in your Warnings the following day.

Ribbon Access: Webpage > http://[servername]:[portno]/BPOCRM/User.aspx

SELECT THE TODAY TAB

- 1. In the *Dashboard* (Home page) screen,
- 2. Ensure that the *Today* tab is selected to be able to view the day's activities.





DISPLAY THE ACTION BUTTONS

- 1. Hover over an activity to display *Action* buttons:
 - 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
- 2. Hover over any of these to bring up a *button description* text box.



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CCM Example Company Abigail Milne 🌣 🌢					
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Activities for Last 30 Days	1 Month Performance	4 Month Pipeline			
DescriptionTarget CustmrsExisting CustmrsNew CustmrsPhone call1000001Email000Meeting000On Site inspection001Site inspection200	15 000.00 12 000.00 9 000.00 5 000.00 3 000.00 0.00 Cases Invoices Orders Quotes	Jul 2019 Aug 2019 Sep 2019 Oct 2019			
30 Sep 2016 0 4 Image: specific cold call Image: specific cold call Image: specific cold call Total Total Total Total Total Total Total Total Total Total Total Total Total Total Total	Today Recent Calendar Schedule Date Email - Networking and Laptops: Email product broch When: 22 Jul 2019, 15:00-16:00 When: John Jackson, Networking and Laptops Tel: Email:	Status Jre Cell: Bus: 031 123 4567 Event client requirements Next Action			
customens cases addvites 5 147 4 Q quotes equipment 3rd party	Hone can be derived free product range. When: 22 Jul 2019, 13:00-14:00 Who: Jason King, King Enterprises Tel: Email: Page 1 of 1 (2 items) ∉ ∈ [1] > > m	Cell: Bus: 0123456789 Page size: 10 v			
Localhost 50000/BPOCRM/NextActivity/D_Activit.					

ACTIVITY QUICK VIEW SUMMARY

- 1. *Single click* on any activity in this screen,
- 2. To access a *quick view summary* of the activity information.





NAVIGATE TO CUSTOMER DASHBOARD

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



CCM Example Company			Abig	gail Milne 🍄 🕯
🔛 Dashboard			Search	Q
Activities for Last 30 Days		1 Month Performance 4 Month Pipeli		e
Description Target Cust Cust Exis Cust Phone call 10000 10000 Email 0 10000 10000 Meeting 0 0 10000 10000 On Site inspection 0 3 3 10000 10000	New trmrs New Custmrs 15 000 12 000 0 1 0000 0 0 9000 0 0 6 000 0 1 0 0 0 3 000 0 0 3 000	0.00 0.00 0.00 0.00 0.00 Cases Invoices Orders Oustes	4 090.00 3 090.00 2 090.00 1 090.00 0.00	19 Oct 2019
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Customers Customers 5 147 Cases Cases Cases Cases Cases Cases Cases Cases Cases Cases Cases Cases Cases Cases	activities A Page 1 of 1 3rd narty	Email: one call - King Enterprises: Phone call tr d give overview of new product range. When: 22 Jul 2019, 13:00-14:00 Who: Jason King, King Enterprises Tel: Email: (2 items) @ c [1] > 2 M M	bus: 031 123 4567 o discuss present client requiremen Cell: Bus: 0123456789	Page size: 10 V
	©20	019 CO3 Technologies (Pty) Ltd (3.5.6.0 / 3.5.6.0)	G	

- 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.001.001

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