

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,
- 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

- 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



Recent Activities

CCM Example Company							oigail Milne 🄅 🕯
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Activities for Last 30 Days				1 Month Performance 4 Month Pipelin			eline
Description Phone call Email	Target Ex Cu 400 120	isting New stmrs Custm 0 5 0 1	5 12 000.0 9 000.0	10 10		6 000.00 5 000.00 4 000.00 3 000.00	
Meeting On Site inspection Site inspection	40 50 2	0 1 0 1 0 0	6 000.0 3 000.0 0.0	10 10 00 Cases Invoices	Orders Quotes	2 000.00 1 000.00 0.00 Jul 2019 Aug 2019 S	iep 2019 Oct 2019
create cold call	30 Sep 2016	0 ns warning 9	1 Toda	y Recent Calendar Phone call - King When: Who: Tel: Email:	Schedule Date Copiers: Client wants 19 Jul 2019, 15:00-16:0 Jason King, King Copiers 0210134508	s to view product brochure: 10 3. Cell: Bus: 0210134508	Status 3
customers 5 Q quotes	cases	47 3rd part	4	Phone call - Scray When: Who: Tel: Email: Phone call - Liber When: Who: Tel: Email:	booking Supplies Un 19 Jul 2019, 15:00-16:00 Sophle King, Scrapbookin sking@noemail.com ty Jones: Potential Ne 19 Jul 2019, 10:00-10:0 Jemma Jones, Liberty Jo 0120230340	limited: Discuss new produ- g Supplies Unlimited Cell: Bus: 031 123 4567 ew Deal - 2 machines renta fromes Cell: Bus: 0120230340	al
			©201	9 CO3 Technologies (Pty) Lt	d (3.5.6.0 / 3.5.6.0)	(

ACTIVITY QUICK VIEW SUMMARY

- 1. Single click on any activity.
- 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 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.



Recent Activities



CRM.001.002

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