

CRM CUSTOMERS

WARNINGS

Warnings are notifications of overdue activities, that can be directly actioned.

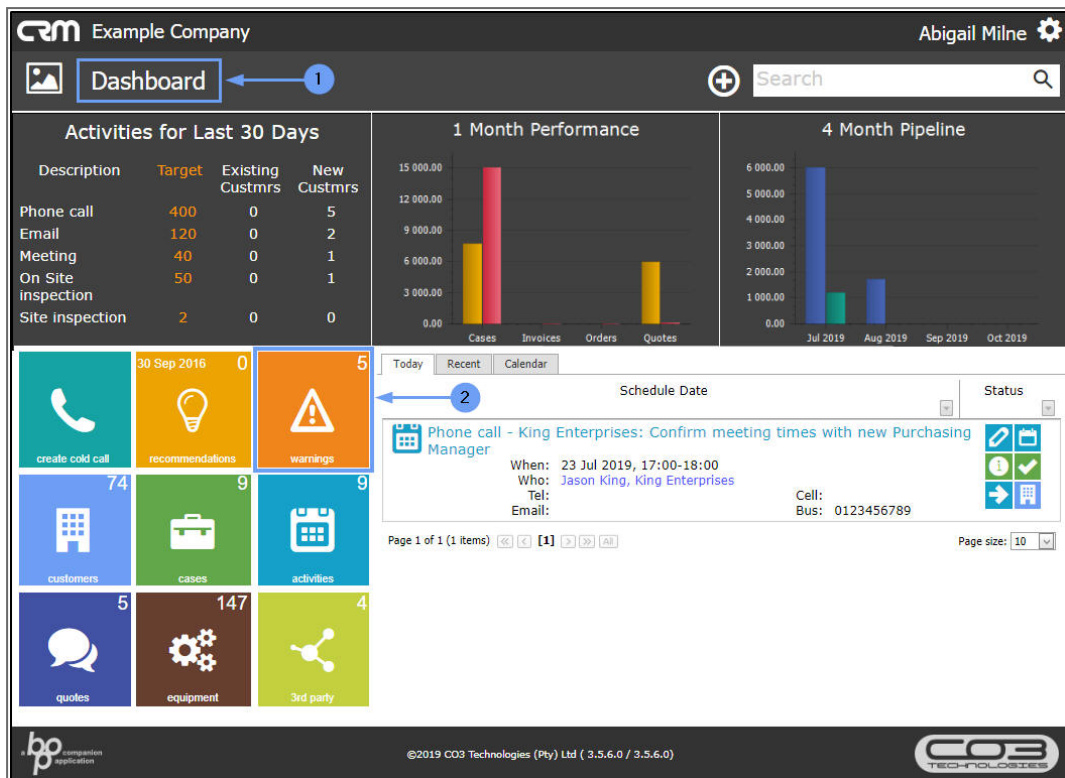
A full list of warnings can be accessed from the Dashboard (Home page).

Client-specific warnings can be accessed from the from the Customer Dashboard as set out below.

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

ACCESS WARNINGS FROM THE DASHBOARD (HOME PAGE)

1. In the **Dashboard** (Home page) screen,
2. Click on the **Warnings** tile.

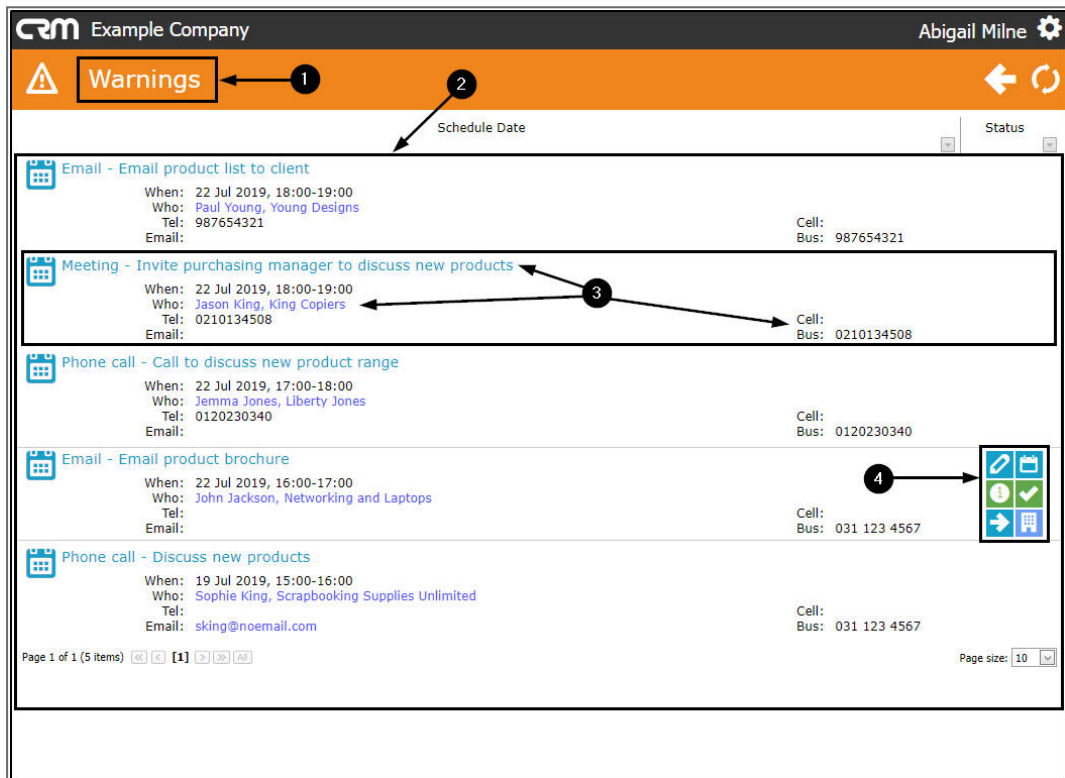


THE WARNINGS SCREEN (ALL CUSTOMERS)

1. The **Warnings** page will be displayed.
2. Here you can view all the warnings - where you have activities pending.
3. Each warning lists:
 - The activity **subject**
 - **When** the activity was scheduled for
 - **Who** the activity was scheduled with
 - **Contact details** for the activity:
 - Tel:
 - Email:
 - Cell:
 - Business No:


WARNINGS 'ACTION ITEM' BUTTONS


4. Hover over any activity to reveal the **Action Item** 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






VIEW ACTIVITY SUMMARY

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



Example Company

Abigail Milne




Warnings


Schedule Date
Status


Email - Email product list to client

When: 22 Jul 2019, 18:00-19:00
Who: [Paul Young, Young Designs](#)
Tel: 987654321
Email:
Cell: 987654321
Bus: 987654321








Meeting - Invite purchasing manager to discuss new products


When: 22 Jul 2019, 18:00-19:00
Who: [Jason King, King Copiers](#)
Tel: 0210134508
Email:
Cell: 0210134508
Bus: 0210134508


Phone call - Call to discuss new product range


When: 22 Jul 2019, 17:00-18:00
Who: [Jemma Jones, Liberty Jones](#)
Tel: 0120230340
Email:
Cell: 0120230340
Bus: 0120230340

Where: 22 River House, River Way, River Town, River City,
Case: Potential New Deal
Comments: Client updating machines
Completion Notes:


Email - Email product brochure

When: 22 Jul 2019, 16:00-17:00
Who: [John Jackson, Networking and Laptops](#)
Tel:
Email:
Cell: 031 123 4567
Bus: 031 123 4567

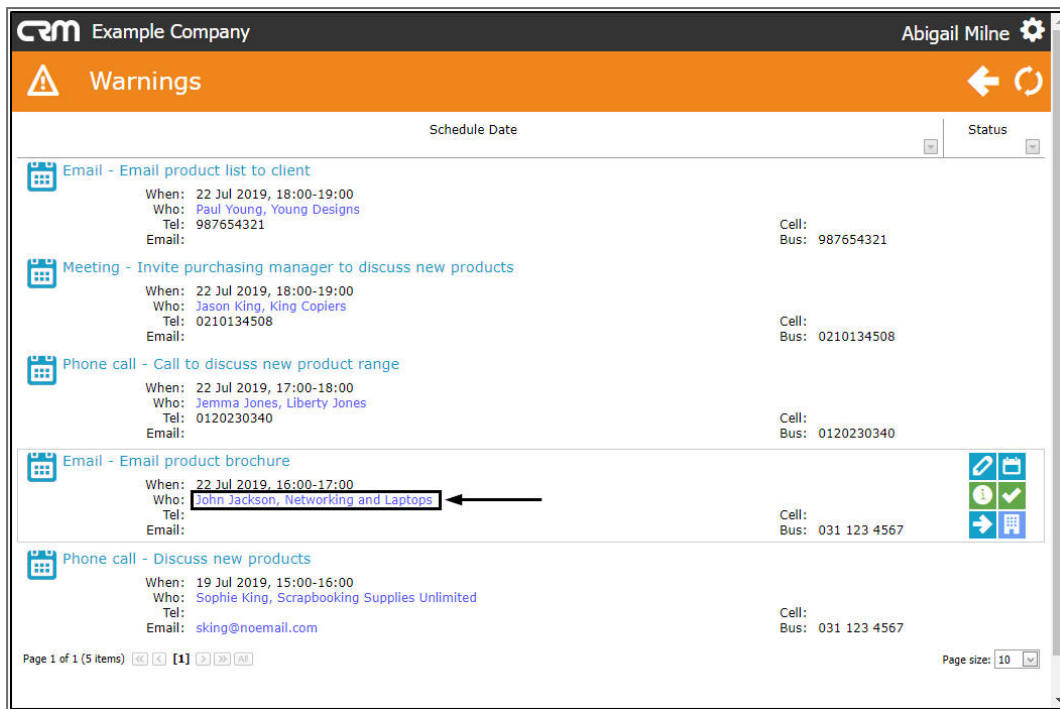

Phone call - Discuss new products

When: 19 Jul 2019, 15:00-16:00
Who: [Sophie King, Scrapbooking Supplies Unlimited](#)
Tel:
Email: [sking@noemail.com](#)
Cell: 031 123 4567
Bus: 031 123 4567

Page 1 of 1 (5 items)
Page size: 10

NAVIGATE TO THE CUSTOMER DASHBOARD

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



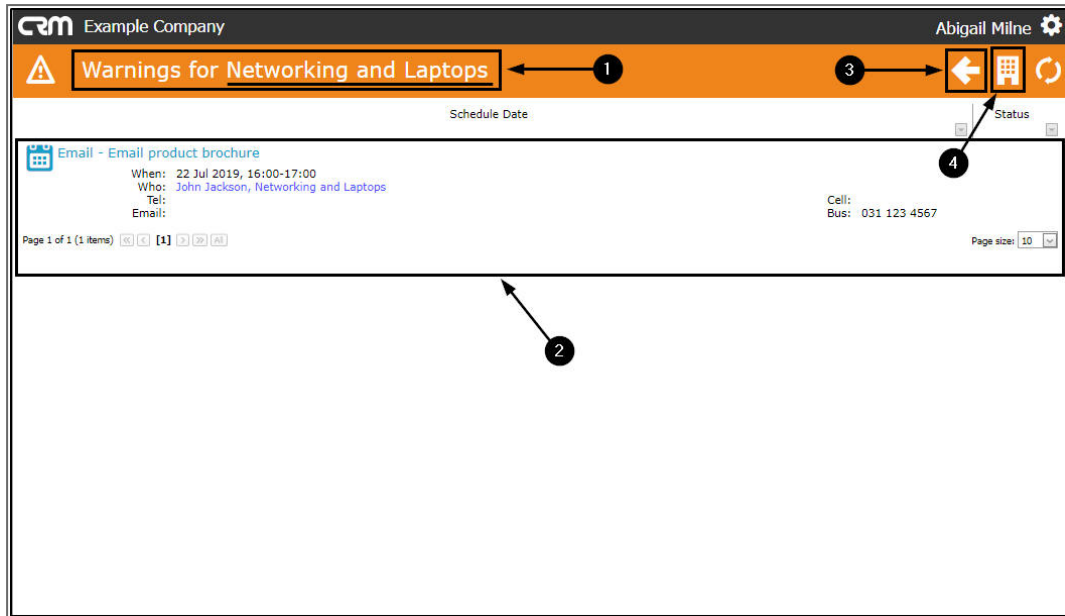
1. The selected **Customer Dashboard** screen will be displayed.
2. Here you can view the **Customer/Company details** and **12 Months Sales History**.
3. A panel of **Links** tiles can direct you to further information regarding this customer.

ACCESS WARNINGS FROM THE CUSTOMER DASHBOARD

4. Click on the **Warnings** tile.



1. The **customer specific** warning screen will be displayed.
2. Here you can only view the warnings for that particular customer.
 - Follow the steps as explained above to **reveal the warnings action buttons** or **view the activity summary**.
3. Click on **Back** to return to the previous page.
4. Click on the **Customer icon** to return to the Customer page.



The screenshot displays the CRM interface for 'Example Company' with user 'Abigail Milne'. The main heading is 'Warnings for Networking and Laptops'. Below this is a 'Schedule Date' field. A list of warnings is shown, with the first entry being 'Email - Email product brochure' scheduled for '22 Jul 2019, 16:00-17:00' to 'John Jackson, Networking and Laptops'. The entry includes fields for 'When', 'Who', 'Tel', and 'Email'. To the right of the entry are 'Cell' and 'Bus' fields with values ':031 123 4567'. At the bottom left of the list is a pagination bar showing 'Page 1 of 1 (1 items)' and navigation buttons. At the bottom right is a 'Page size' dropdown set to '10'. Four numbered callouts are present: 1 points to the warning title, 2 points to the warning list area, 3 points to the back arrow icon, and 4 points to the status icon.

CRM.002.003

