

## CRM CUSTOMERS

### OPEN ACTIVITIES

Open Activities will list all open activities for the selected customer, and can be actioned directly from here.

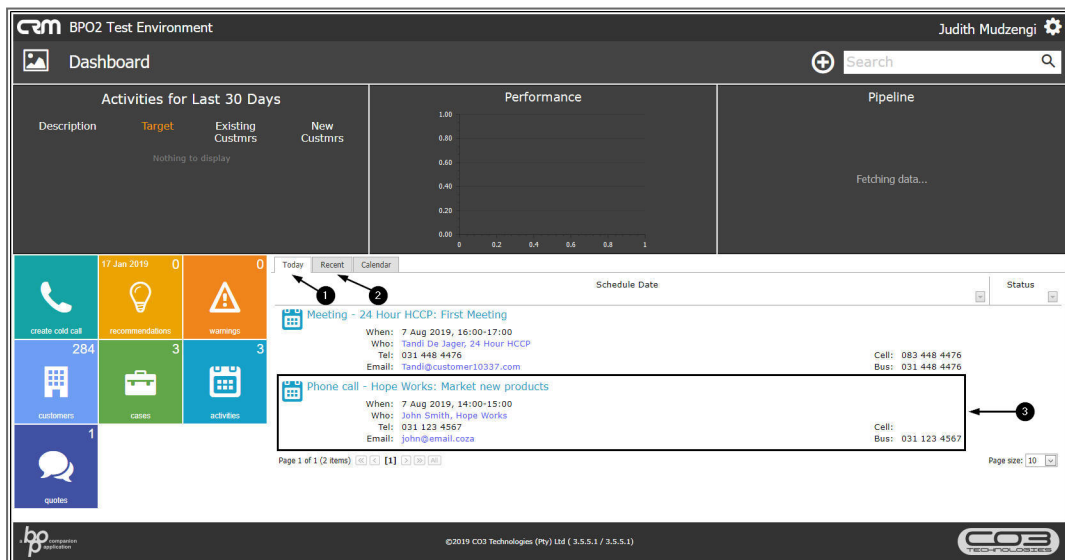
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**Ribbon Access:** Webpage > [http://\[servername\]:\[port-no\]/BPOCRM/User.aspx](http://[servername]:[port-no]/BPOCRM/User.aspx)

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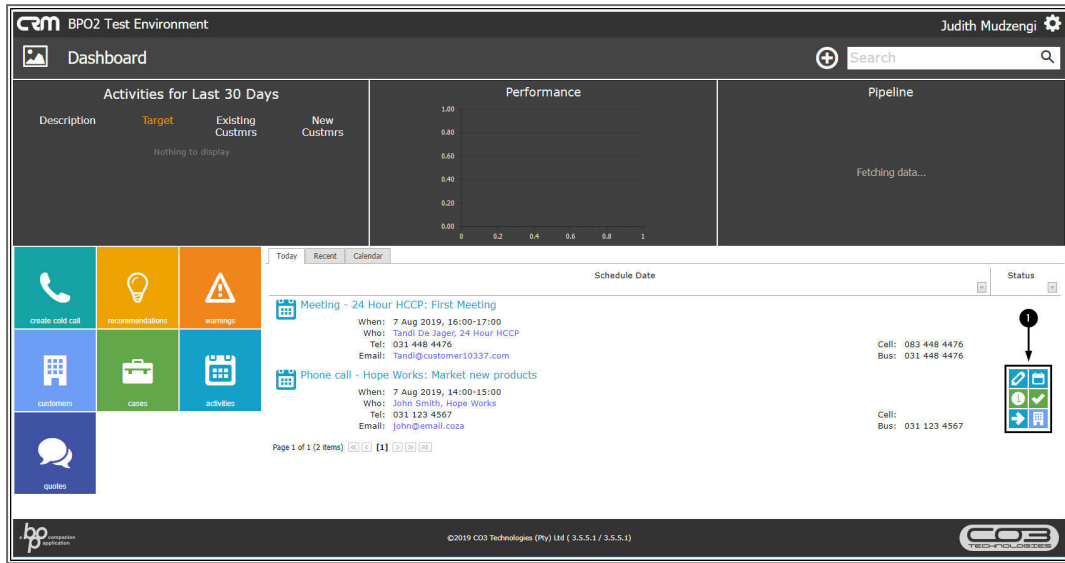
### OPEN ACTIVITIES

1. The **Today** tab will be selected by default displaying customer activities due on that day.
2. If you cannot find the information you are looking for within this tab, click on the **Recent** tab.
3. Hover over an activity linked to the customer you wish to view open activities for.

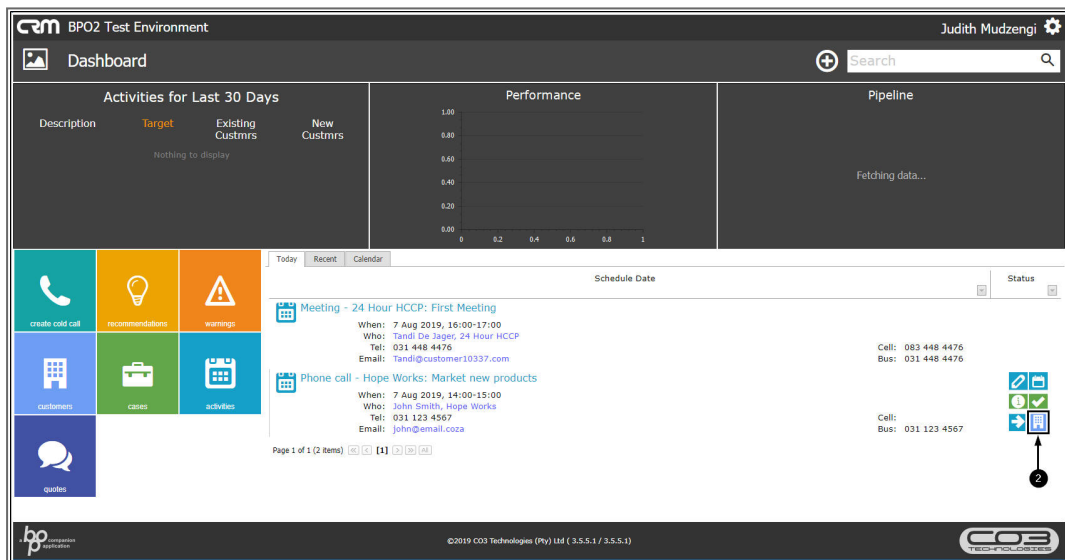


The screenshot displays the CRM BPO2 Test Environment dashboard. The top navigation bar includes the CO3 logo, 'BPO2 Test Environment', a user profile 'Judith Mudzengi', and a search bar. The main dashboard area is divided into three sections: 'Activities for Last 30 Days' (with a table showing Description, Target, Existing Customers, and New Customers), 'Performance' (a line chart), and 'Pipeline' (a bar chart). Below these are several widgets: 'create call call' (284), 'recommendations' (3), 'warnings' (3), 'customers' (1), 'calls' (3), and 'activities' (3). The 'activities' widget is expanded, showing a list of activities. The first activity is 'Meeting - 24 Hour HCCP: First Meeting' with details: When: 7 Aug 2019, 16:00-17:00; Who: Tandi De Jager; 24 Hour HCCP; Tel: 031 448 4476; Email: tandi@customer10337.com. The second activity is 'Phone call - Hope Works: Market new products' with details: When: 7 Aug 2019, 14:00-15:00; Who: John Smith, Hope Works; Tel: 031 123 4567; Email: john@email.co.za. The bottom of the screen shows a footer with 'bpo2 technologies', '©2019 CO3 Technologies (Pty) Ltd (3.5.5.1 / 3.5.5.1)', and the CO3 logo.

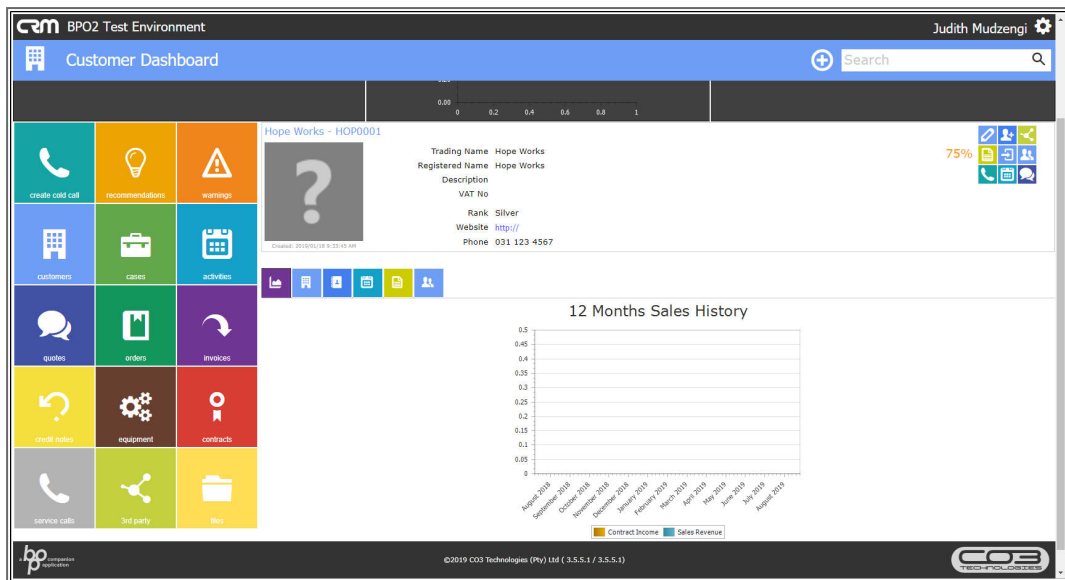
1. **Action icons** will be displayed to the right of the customer activity you are hovering over.



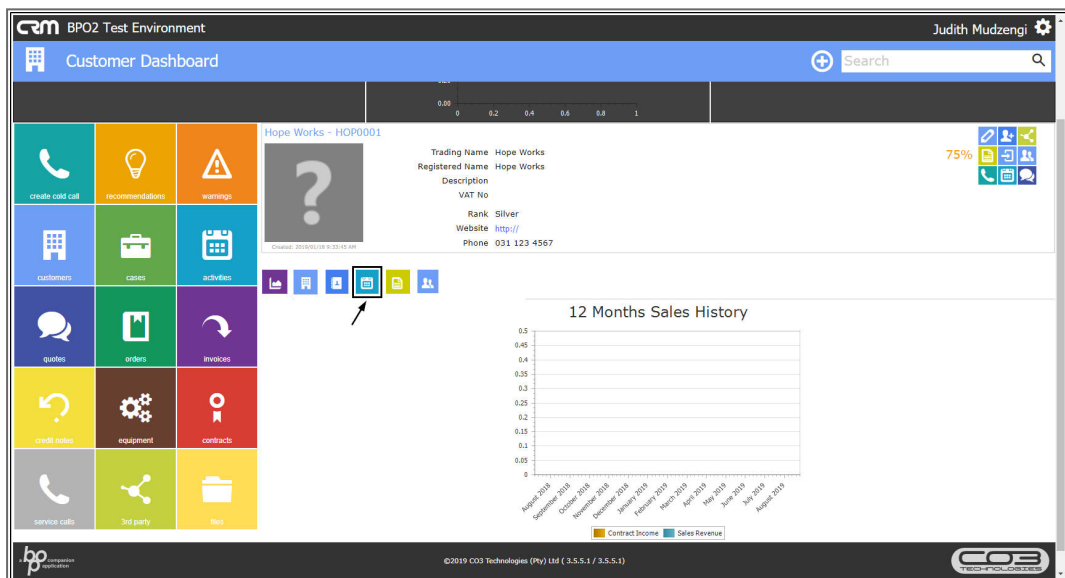
2. Click on the **View Customer** icon.



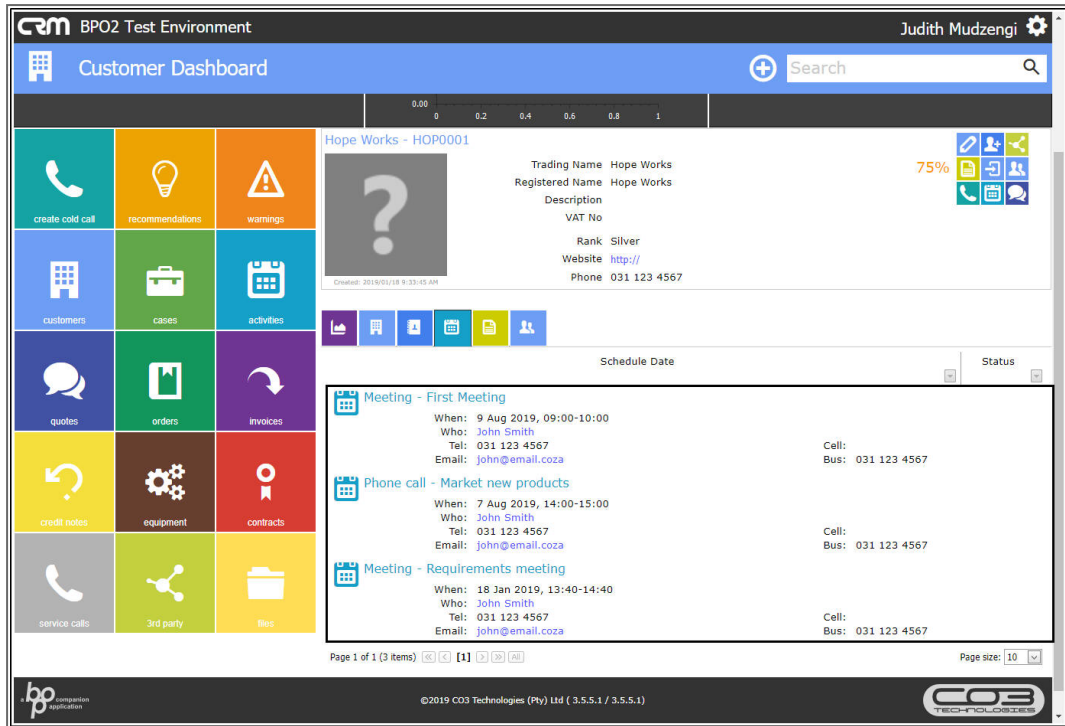
- The **Customer Dashboard** will be displayed.



- Click on the **Open Activities** icon.



- All open activities for the selected customer will be displayed.



**CRM BPO2 Test Environment** Judith Mudzengi

**Customer Dashboard** Search

**Hope Works - HOP0001**

Trading Name Hope Works  
Registered Name Hope Works  
Description  
VAT No  
Rank Silver  
Website <http://>  
Phone 031 123 4567

75%

Created: 2019/01/18 9:33:05 AM

Activities:

- create cold call
- recommendations
- warnings
- customers
- cases
- activities
- quotes
- orders
- invoices
- credit notes
- equipment
- contracts
- service calls
- 3rd party
- files

**Meeting - First Meeting**

When: 9 Aug 2019, 09:00-10:00  
Who: John Smith  
Tel: 031 123 4567  
Email: [john@email.co.za](mailto:john@email.co.za)

Cell: 031 123 4567  
Bus: 031 123 4567

**Phone call - Market new products**

When: 7 Aug 2019, 14:00-15:00  
Who: John Smith  
Tel: 031 123 4567  
Email: [john@email.co.za](mailto:john@email.co.za)

Cell: 031 123 4567  
Bus: 031 123 4567

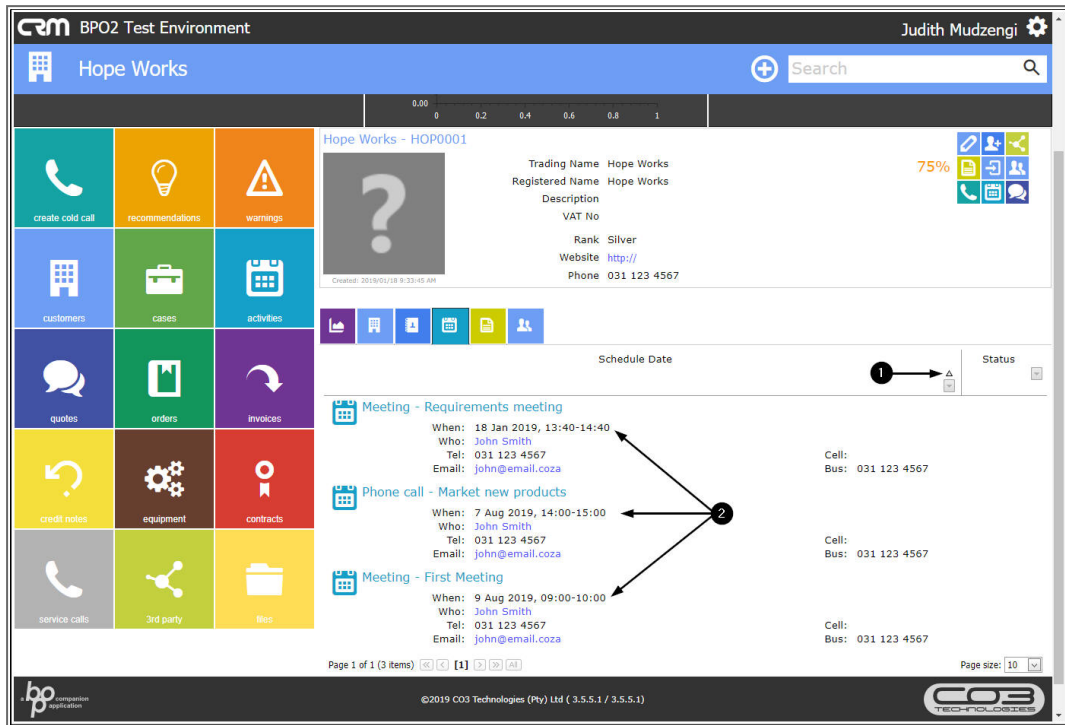
**Meeting - Requirements meeting**

When: 18 Jan 2019, 13:40-14:40  
Who: John Smith  
Tel: 031 123 4567  
Email: [john@email.co.za](mailto:john@email.co.za)

Cell: 031 123 4567  
Bus: 031 123 4567

Page 1 of 1 (3 items) [1] [2] [3] [4] [5] [6] [7] [8] [9] [10] [11] [12] [13] [14] [15] [16] [17] [18] [19] [20] [21] [22] [23] [24] [25] [26] [27] [28] [29] [30] [31] [32] [33] [34] [35] [36] [37] [38] [39] [40] [41] [42] [43] [44] [45] [46] [47] [48] [49] [50] [51] [52] [53] [54] [55] [56] [57] [58] [59] [60] [61] [62] [63] [64] [65] [66] [67] [68] [69] [70] [71] [72] [73] [74] [75] [76] [77] [78] [79] [80] [81] [82] [83] [84] [85] [86] [87] [88] [89] [90] [91] [92] [93] [94] [95] [96] [97] [98] [99] [100] [101] [102] [103] [104] [105] [106] [107] [108] [109] [110] [111] [112] [113] [114] [115] [116] [117] [118] [119] [120] [121] [122] [123] [124] [125] [126] [127] [128] [129] [130] [131] [132] [133] [134] [135] [136] [137] [138] [139] [140] [141] [142] [143] [144] [145] [146] [147] [148] [149] [150] [151] [152] [153] [154] [155] [156] [157] [158] [159] [160] [161] [162] [163] [164] [165] [166] [167] [168] [169] [170] [171] [172] [173] [174] [175] [176] [177] [178] [179] [180] [181] 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[1726] [1727] [1728] [1729] [1730] [1731] [1732] [1733] [1734] [1735] [1736] [1737] [1738] [1739] [1740] [1741] [1742] [1743] [1744] [1745] [1746] [1747] [1748] [1749] [1750] [1751] [1752] [1753] [1754] [1755] [1756] [1757] [1758] [1759] [1760] [1761] [1762] [1763] [1764] [1765] [1766] [1767] [1768] [1769] [1770] [1771] [1772] [1773] [1774] [1775] [1776] [1777] [1778] [1779] [1780] [1781] [1782] [1783] [1784] [1785] [1786] [1787] [1788] [1789] [1790] [1791] [1792] [1793] [1794] [1795] [1796] [1797] [1798] [1799] [1800] [1801] [1802] [1803] [1804] [1805] [1806] [1807] [1808] [1809] [1810] [1811] [1812] [1813] [1814] [1815] [1816] [1817] [1818] [1819] [1820] [1821] [1822] [1823] [1824] [1825] [1826] [1827] [1828] [1829] [1830] [1831] [1832] [1833] [1834] [1835] [1836] [1837] [1838] [1839] [1840] [1841] [1842] [1843] [1844] [1845] [1846] [1847] [1848] [1849] [1850] [1851] [1852] [1853] [1854] [1855] [1856] [1857] [1858] [1859] [1860] [1861] [1862] [1863] [1864] [1865] [1866] [1867] [1868] [1869] [1870] [1871] [1872] [1873] [1874] [1875] [1876] [1877] [1878] [1879] [1880] [1881] [1882] [1883] [1884] [1885] [1886] [1887] [1888] [1889] [1890] [1891] [1892] [1893] [1894] [1895] [1896] [1897] [1898] [1899] [1900] [1901] [1902] [1903] [1904] [1905] [1906] [1907] [1908] [1909] [1910] [1911] [1912] [1913] [1914] [1915] [1916] [1917] [1918] [1919] [1920] [1921] [1922] [1923] [1924] [1925] [1926] [1927] [1928] [1929] [1930] [1931] [1932] [1933] [1934] [1935] [1936] [1937] [1938] [1939] [1940] [1941] [1942] [1943] [1944] [1945] [1946] [1947] [1948] [1949] [1950] [1951] [1952] [1953] [1954] [1955] [1956] [1957] [1958] [1959] [1960] [1961] [1962] [1963] [1964] [1965] [1966] [1967] [1968] [1969] [1970] [1971] [1972] [1973] [1974] [1975] [1976] [1977] [1978] [1979] [1980] [1981] [1982] [1983] [1984] [1985] [1986] [1987] [1988] [1989] [1990] [1991] [1992] [1993] [1994] [1995] [1996] [1997] [1998] [1999] [2000] [2001] [2002] [2003] [2004] [2005] [2006] [2007] [2008] [2009] [2010] [2011] [2012] [2013] [2014] [2015] [2016] [2017] [2018] [2019] [2020] [2021] [2022] [2023] [2024] [2025] [2026] [2027] [2028] [2029] [2030] [2031] [2032] [2033] [2034] [2035] [2036] [2037] [2038] [2039] [2040] [2041] [2042] [2043] [2044] [2045] [2046] [2047] [2048] [2049] [2050] [2051] [2052] [2053] [2054] [2055] [2056] [2057] [2058] [2059] [2060] [2061] [2062] [2063] [2064] [2065] [2066] [2067] [2068] [2069] [2070] [2071] [2072] [2073] [2074] [2075] [2076] [2077] [2078] [2079] [2080] [2081] [2082] [2083] [2084] [2085] [2086] [2087] [2088] [2089] [2090] [2091] [2092] [2093] [2094] [2095] [2096] [2097] [2098] [2099] [2100] [2101] [2102] [2103] [2104] [2105] [2106] [2107] [21

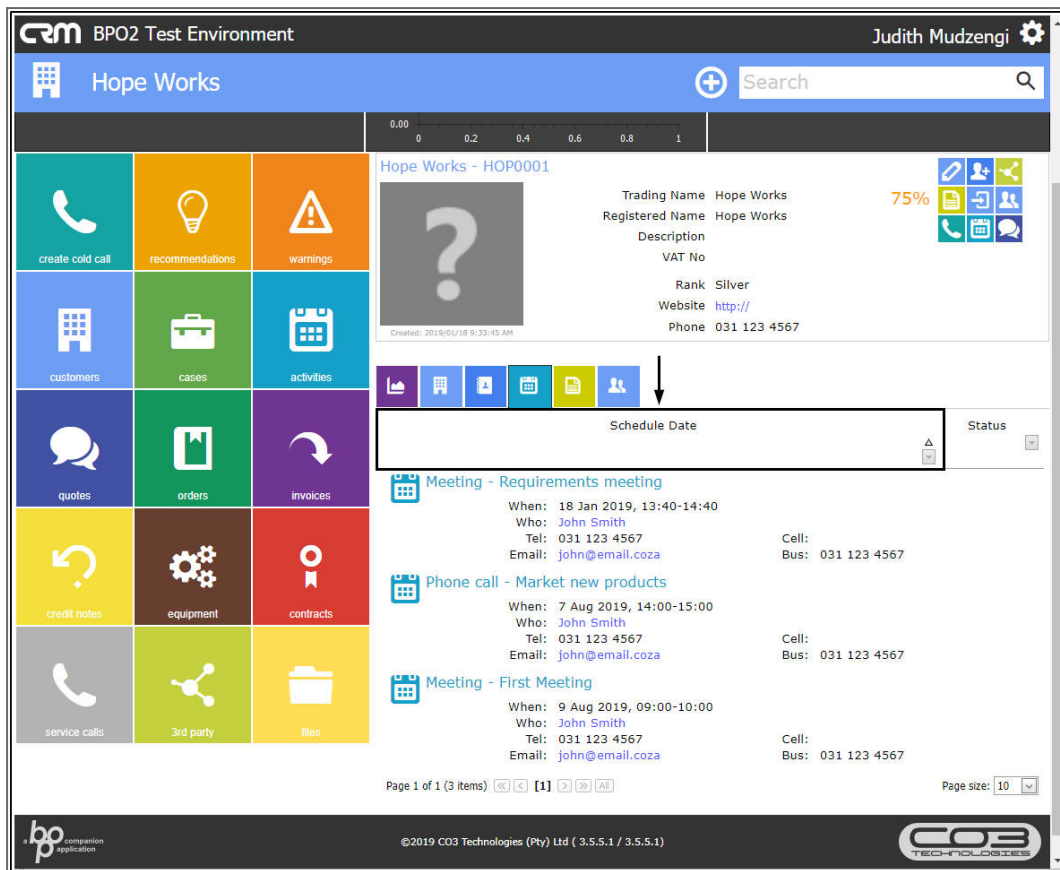
1. A **Sort** button will be revealed, pointing upwards and
2. all open activities will be sorted in **ascending** order - **earliest** date first.



The screenshot displays the CO3 CRM interface for a customer named 'Hope Works'. The left sidebar contains various functional icons such as 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The main content area shows the customer's details, including 'Trading Name', 'Registered Name', 'Description', 'VAT No', 'Rank', 'Website', and 'Phone'. Below this, a list of activities is displayed with columns for 'Schedule Date' and 'Status'. The 'Schedule Date' column header is highlighted with a circled '1', and a circled '2' points to the sort icon in the column header.

Activity	When	Who	Tel	Email	Cell	Bus
Meeting - Requirements meeting	18 Jan 2019, 13:40-14:40	John Smith	031 123 4567	john@email.coza	031 123 4567	031 123 4567
Phone call - Market new products	7 Aug 2019, 14:00-15:00	John Smith	031 123 4567	john@email.coza	031 123 4567	031 123 4567
Meeting - First Meeting	9 Aug 2019, 09:00-10:00	John Smith	031 123 4567	john@email.coza	031 123 4567	031 123 4567

- To sort in descending order, click on the **Schedule Data** column header.



The screenshot displays the CO3 CRM interface for a customer named 'Hope Works'. The top navigation bar includes the CO3 logo, 'BPO2 Test Environment', the user name 'Judith Mudzengi', and a search bar. The main header shows the customer name 'Hope Works' and a progress indicator at 75%.

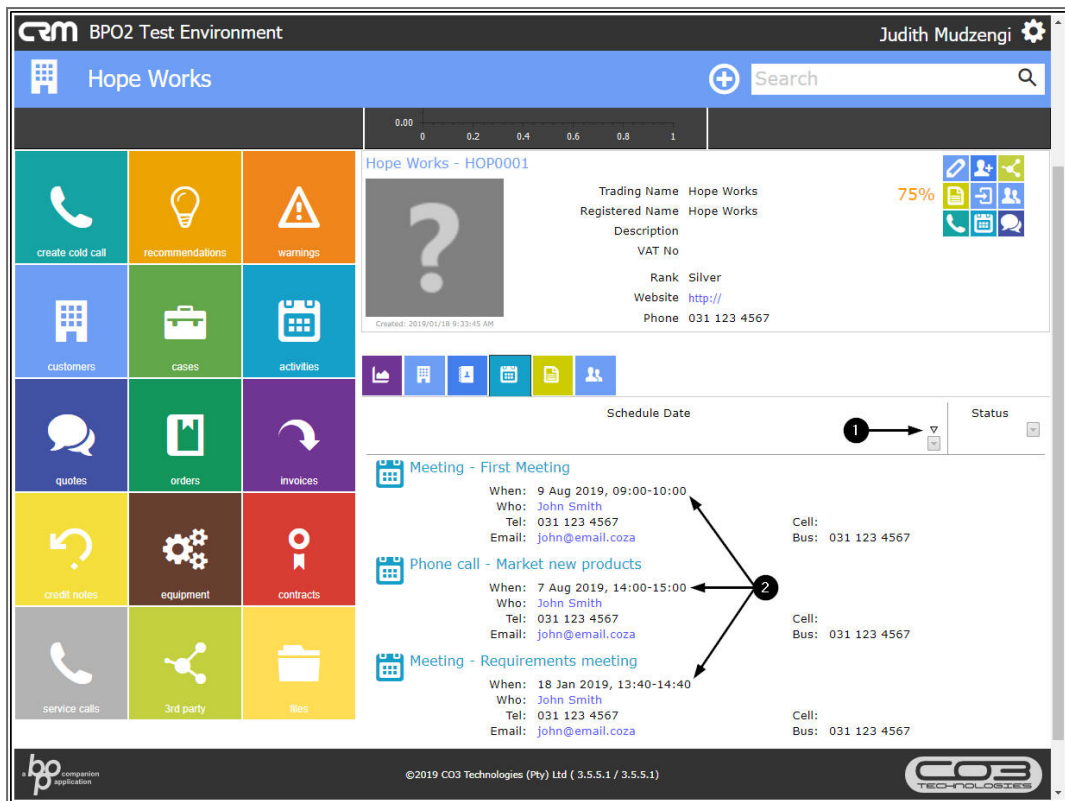
The left sidebar contains a grid of icons for various functions: create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files.

The main content area shows the customer details for 'Hope Works - HOP0001', including trading name, registered name, description, VAT No, rank (Silver), website, and phone number. Below this, a list of open activities is displayed, sorted by date in descending order (latest first). The activities are:

- Meeting - Requirements meeting**: When: 18 Jan 2019, 13:40-14:40; Who: John Smith; Tel: 031 123 4567; Email: john@email.co.za; Cell: 031 123 4567
- Phone call - Market new products**: When: 7 Aug 2019, 14:00-15:00; Who: John Smith; Tel: 031 123 4567; Email: john@email.co.za; Cell: 031 123 4567
- Meeting - First Meeting**: When: 9 Aug 2019, 09:00-10:00; Who: John Smith; Tel: 031 123 4567; Email: john@email.co.za; Cell: 031 123 4567

The bottom of the screen shows pagination information: 'Page 1 of 1 (3 items)' and 'Page size: 10'. The footer includes the CO3 Technologies logo and copyright information: '©2019 CO3 Technologies (Pty) Ltd ( 3.5.5.1 / 3.5.5.1)'.

1. The **Sort** button will now be pointing downwards and
2. all open activities will be sorted in **descending** order - **latest** date first.



**CRM BPO2 Test Environment** Judith Mudzengi

**Hope Works** Search

Hope Works - HOP0001

Trading Name Hope Works  
Registered Name Hope Works  
Description  
VAT No  
Rank Silver  
Website <http://>  
Phone 031 123 4567

75%

Created: 2019/01/18 9:33:45 AM

create cold call recommendations warnings

customers cases activities

quotes orders invoices

credit notes equipment contracts

service calls 3rd party files

Schedule Date Status

1

Meeting - First Meeting

When: 9 Aug 2019, 09:00-10:00  
Who: John Smith  
Tel: 031 123 4567  
Email: [john@email.co.za](mailto:john@email.co.za)

Cell: 031 123 4567  
Bus: 031 123 4567

Phone call - Market new products

When: 7 Aug 2019, 14:00-15:00  
Who: John Smith  
Tel: 031 123 4567  
Email: [john@email.co.za](mailto:john@email.co.za)

Cell: 031 123 4567  
Bus: 031 123 4567

Meeting - Requirements meeting

When: 18 Jan 2019, 13:40-14:40  
Who: John Smith  
Tel: 031 123 4567  
Email: [john@email.co.za](mailto:john@email.co.za)

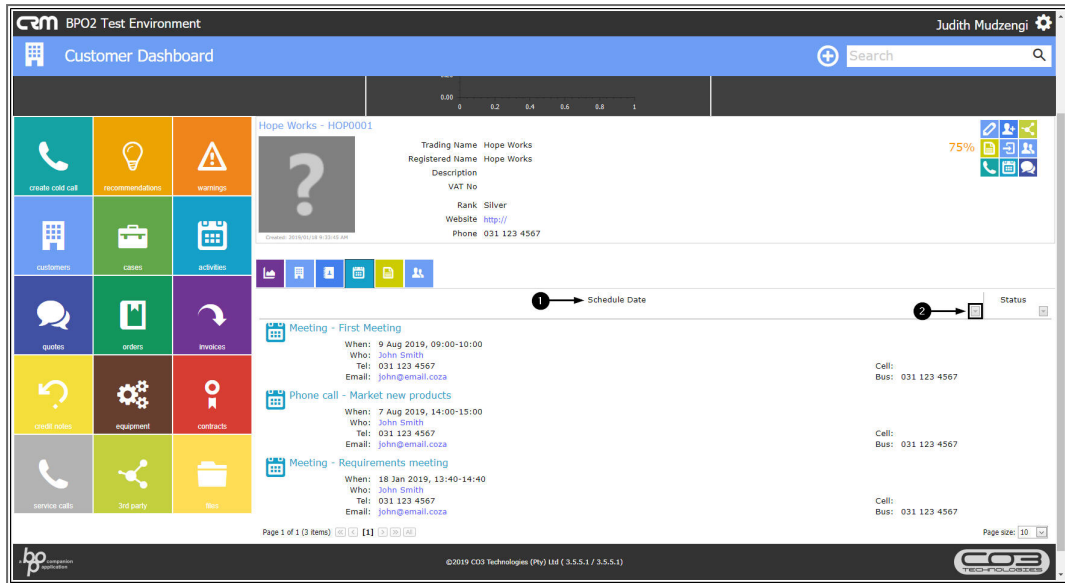
Cell: 031 123 4567  
Bus: 031 123 4567

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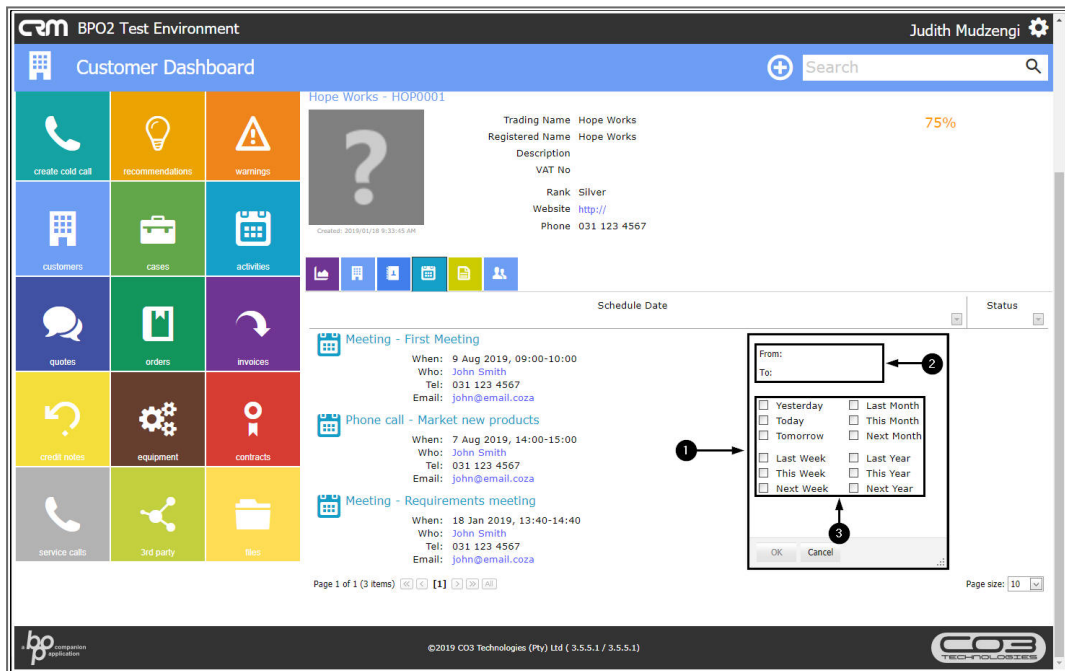
## FILTER OPEN ACTIVITIES BY SCHEDULE DATE

You can filter the list of all open activities by schedule date.

1. On the **Schedule Date** section,
2. click on the **down arrow**.



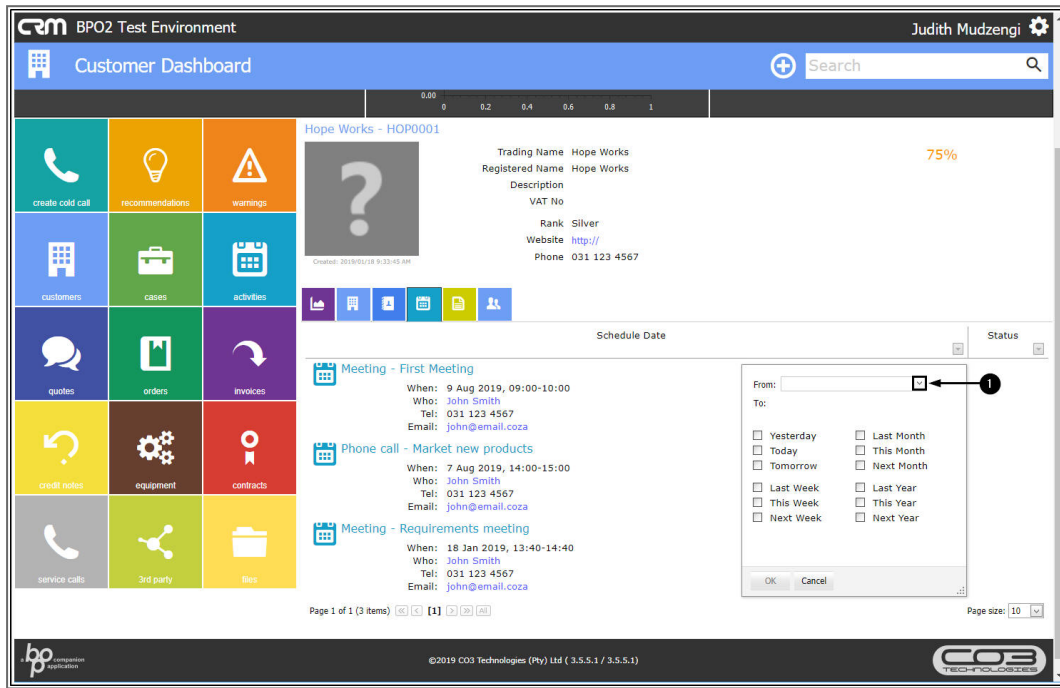
1. A **menu** will be displayed.
2. You can either filter by **Date Range** or
3. **Timeline**.





## FILTER BY DATE RANGE

1. Hover over the **From** field, a **down arrow** will be displayed.
1. Click on the **down arrow**.



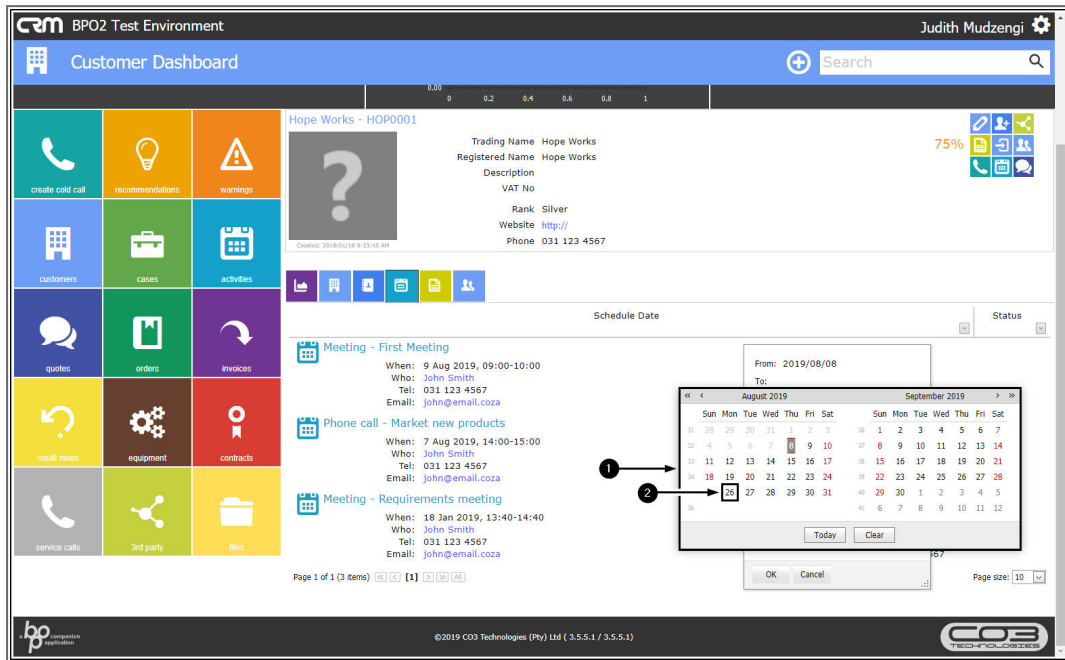
1. A **calender** will be displayed.
2. Select the relevant date.

The screenshot shows the CRM BPO2 Test Environment Customer Dashboard. The user is Judith Mudzengi. The dashboard displays a list of activities for 'Hope Works - HOP0001'. The 'To' field in the 'Schedule Date' section is open, showing a calendar for August 2019. The 'From' field is populated with '9 Aug 2019, 09:00-10:00'. The 'To' field is currently empty, and a calendar is displayed for selection. The calendar shows the date '8' selected. The 'To' field has a down arrow next to it, indicating it can be clicked to open the calendar.

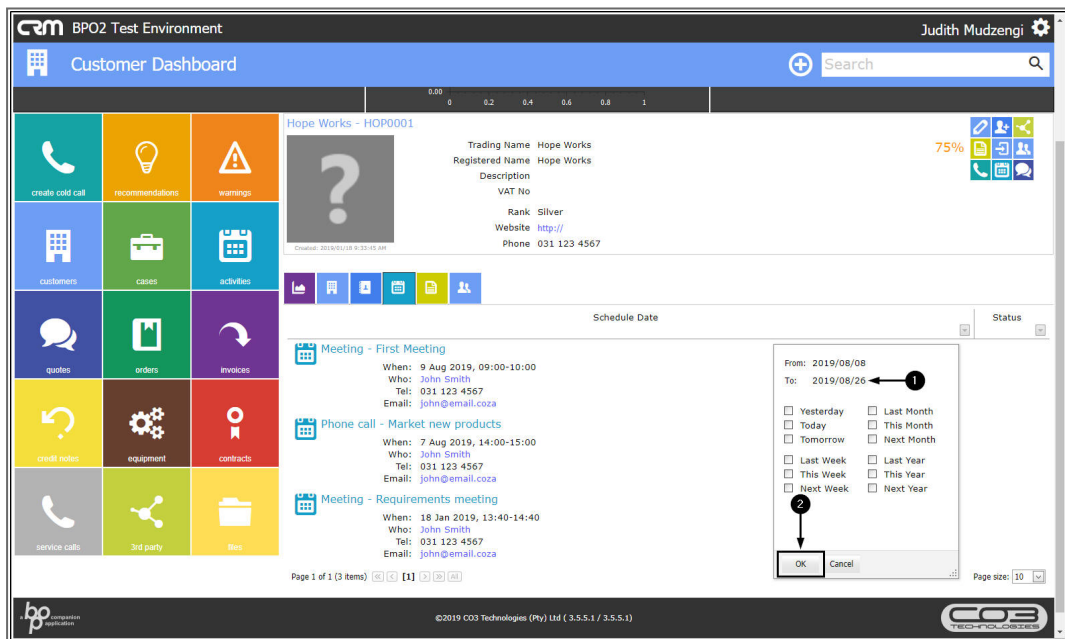
1. The **From** field will be populated with the selected date.
2. Hover over the **To** field, a **down arrow** will be displayed.
3. Click on the **down arrow**.

The screenshot shows the CRM BPO2 Test Environment Customer Dashboard. The user is Judith Mudzengi. The dashboard displays a list of activities for 'Hope Works - HOP0001'. The 'To' field in the 'Schedule Date' section is now populated with '2019/08/08'. The 'From' field is still populated with '9 Aug 2019, 09:00-10:00'. The 'To' field has a down arrow next to it, indicating it can be clicked to open the calendar.

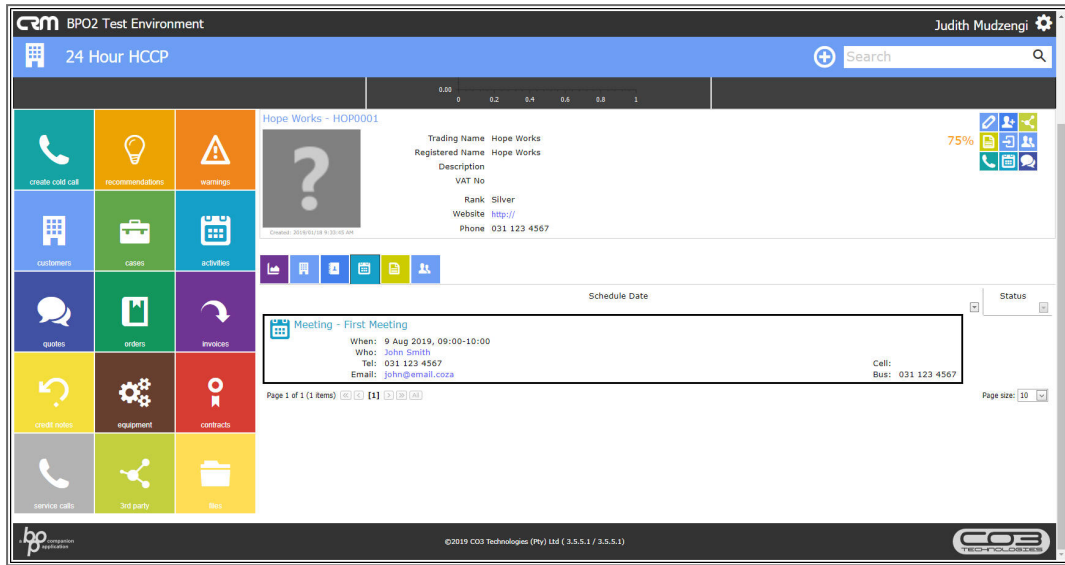
1. A **calender** will be displayed.
2. Select the relevant date.



1. The **To** field will be populated with the selected date.
2. Click on **OK**.

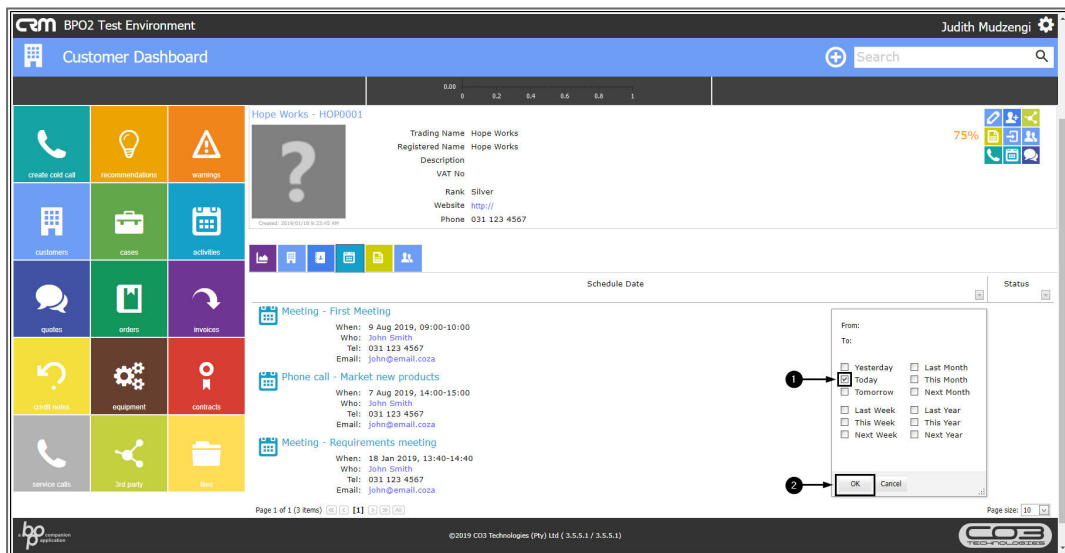


- Only open activities that fall within the selected date range will be displayed.

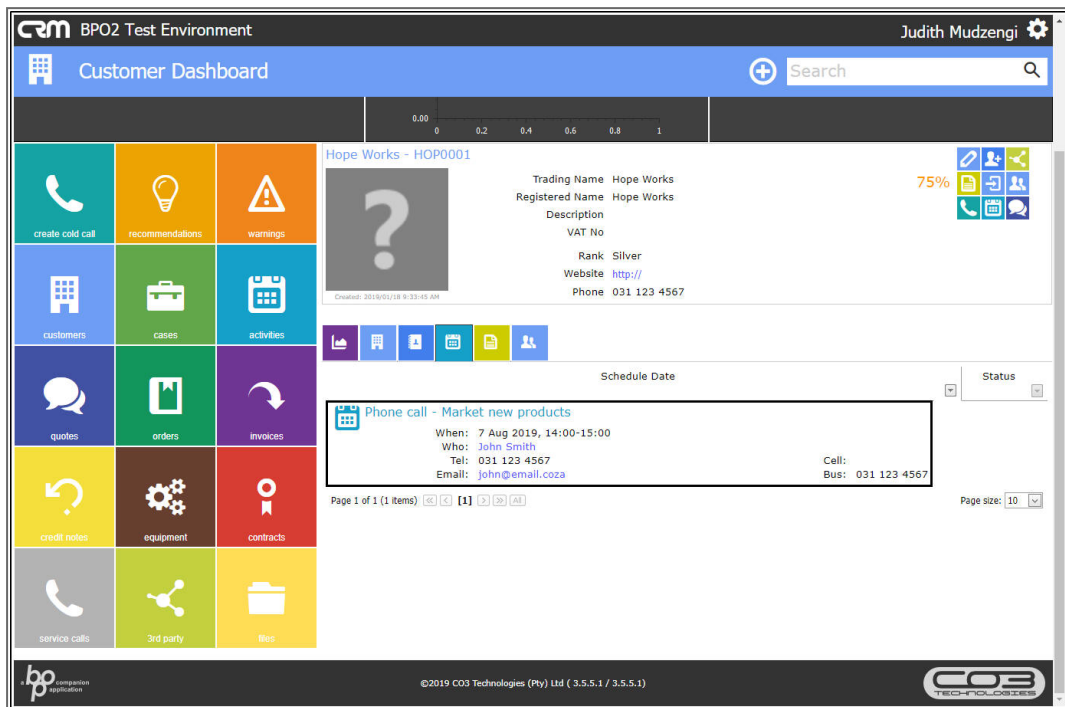


## FILTER BY TIMELINE

1. Click on the **checkbox** of the relevant timeline.
2. Click on **Ok**.



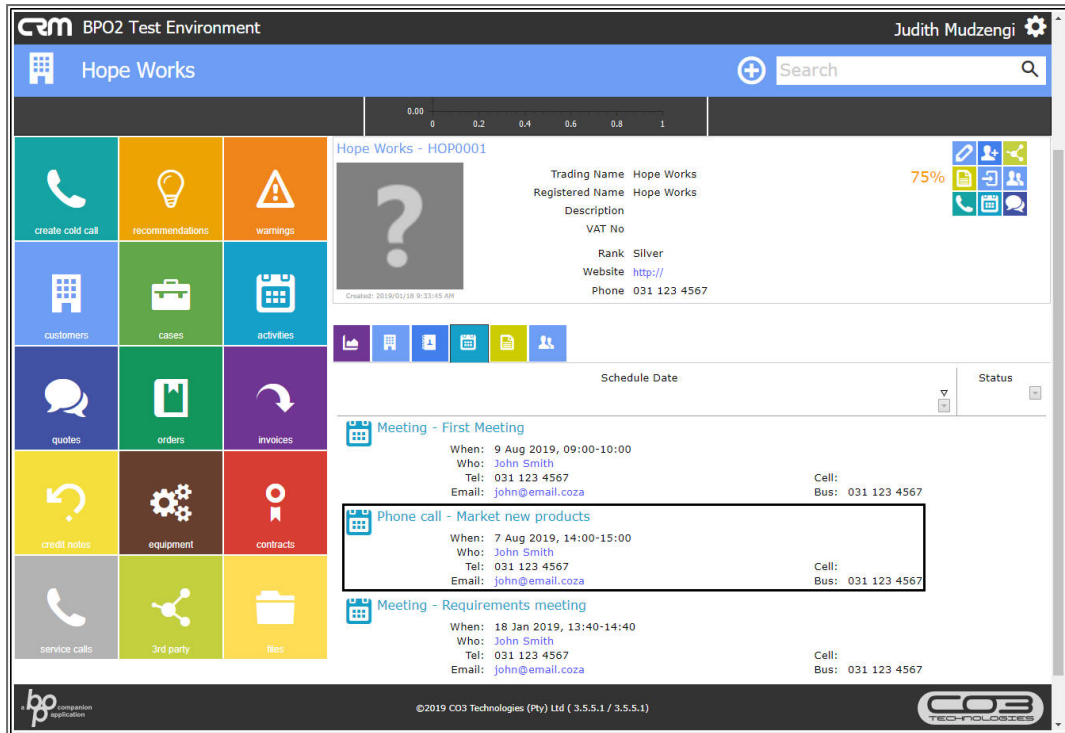
- Only open activities that fall within the selected timeline will be displayed.



The screenshot displays the CRM BPO2 Test Environment Customer Dashboard. The dashboard includes a sidebar with navigation icons for various functions: create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files. The main content area shows the profile for 'Hope Works - HOP0001', including trading name, registered name, description, VAT No, rank (Silver), website, and phone number. A progress bar indicates 75% completion. Below the profile, a list of activities is shown, with one activity highlighted: 'Phone call - Market new products' scheduled for 7 Aug 2019, 14:00-15:00, by John Smith. The activity details include contact information for John Smith.

## ACTION ITEMS

- Hover over an open activity.

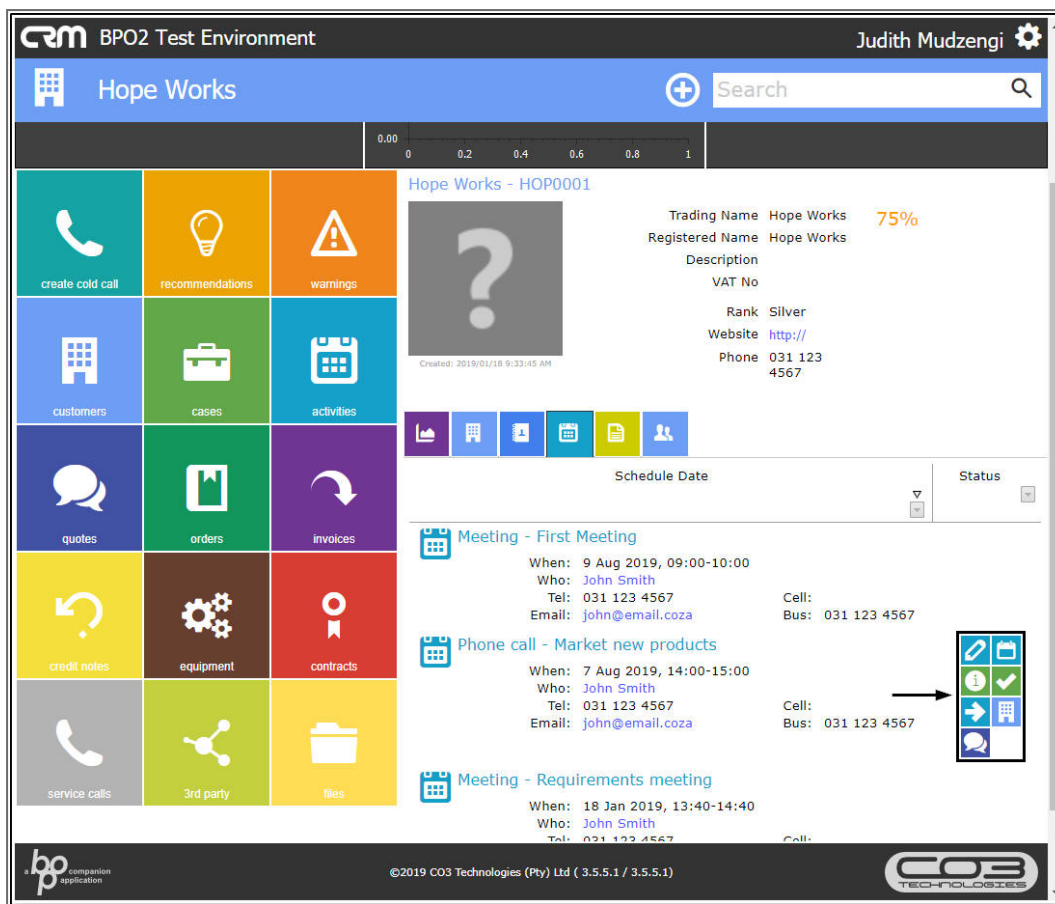


The screenshot displays the CRM BPO2 Test Environment interface. The top bar shows the user 'Judith Mudzengi' and a search bar. The main header is 'Hope Works'. Below this is a navigation pane with icons for 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The main content area shows the details for 'Hope Works - HOP0001'. The details include a profile picture placeholder, a progress bar at 75%, and a list of activities. The activities are:

- Meeting - First Meeting**  
When: 9 Aug 2019, 09:00-10:00  
Who: John Smith  
Tel: 031 123 4567  
Email: john@email.co.za  
Cell: 031 123 4567
- Phone call - Market new products**  
When: 7 Aug 2019, 14:00-15:00  
Who: John Smith  
Tel: 031 123 4567  
Email: john@email.co.za  
Cell: 031 123 4567
- Meeting - Requirements meeting**  
When: 18 Jan 2019, 13:40-14:40  
Who: John Smith  
Tel: 031 123 4567  
Email: john@email.co.za  
Cell: 031 123 4567

The footer shows the CO3 Technologies logo and the text '©2019 CO3 Technologies (Pty) Ltd ( 3.5.5.1 / 3.5.5.1)'.

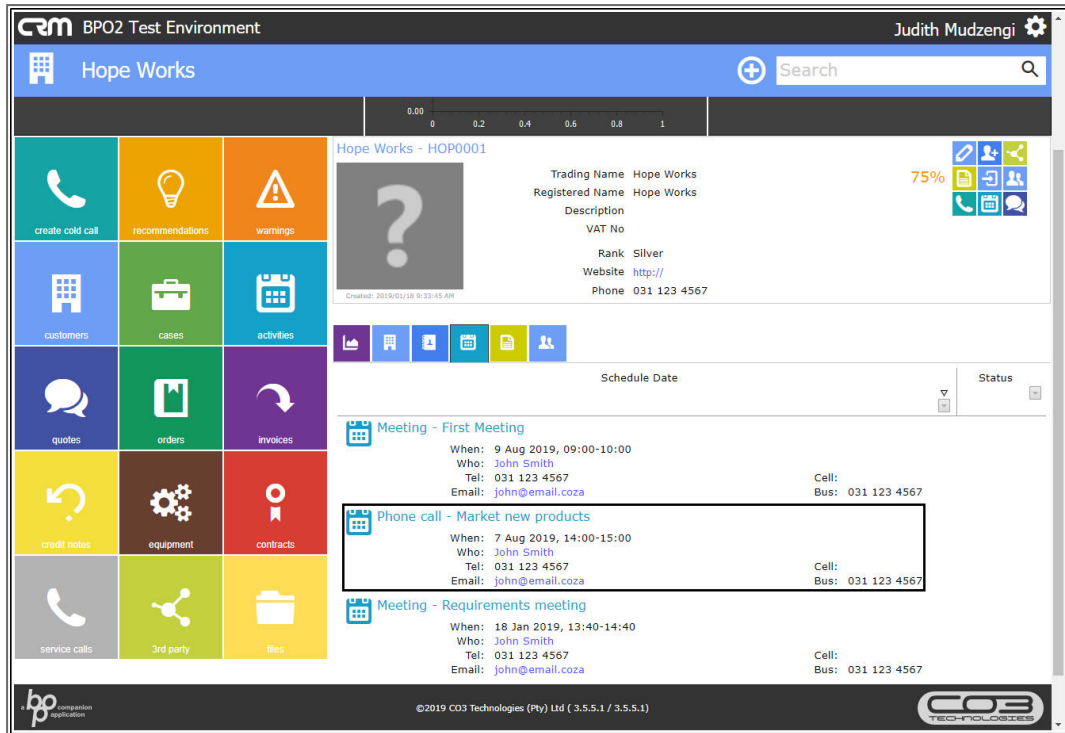
- The following action items will be displayed:
  - Reschedule this Activity
  - View / Edit Activity
  - Close this Case
  - View Case Info and History
  - View Customer
  - Next Action (close current activity and create new activity)
  - Create new Quote



The screenshot displays the CO3 CRM BPO2 Test Environment interface. At the top, the user 'Judith Mudzengi' is logged in. The main header shows 'Hope Works' with a search bar. A progress bar indicates 75% completion. The left sidebar contains various icons for functions like 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The main content area shows the 'Hope Works - HOP0001' profile with details such as Trading Name, Registered Name, Description, VAT No, Rank (Silver), Website, and Phone. Below this, a list of activities is shown, including 'Meeting - First Meeting', 'Phone call - Market new products', and 'Meeting - Requirements meeting'. A small icon set on the right side of the activities list is highlighted with a red box and an arrow.

## VIEW MORE DETAILS OF AN OPEN ACTIVITY

- Click on an open activity you wish to view more details for.



**CRM BPO2 Test Environment** Judith Mudzengi

**Hope Works** Search

**Hope Works - HOP0001**

Trading Name Hope Works  
Registered Name Hope Works  
Description  
VAT No  
Rank Silver  
Website <http://>  
Phone 031 123 4567

75%

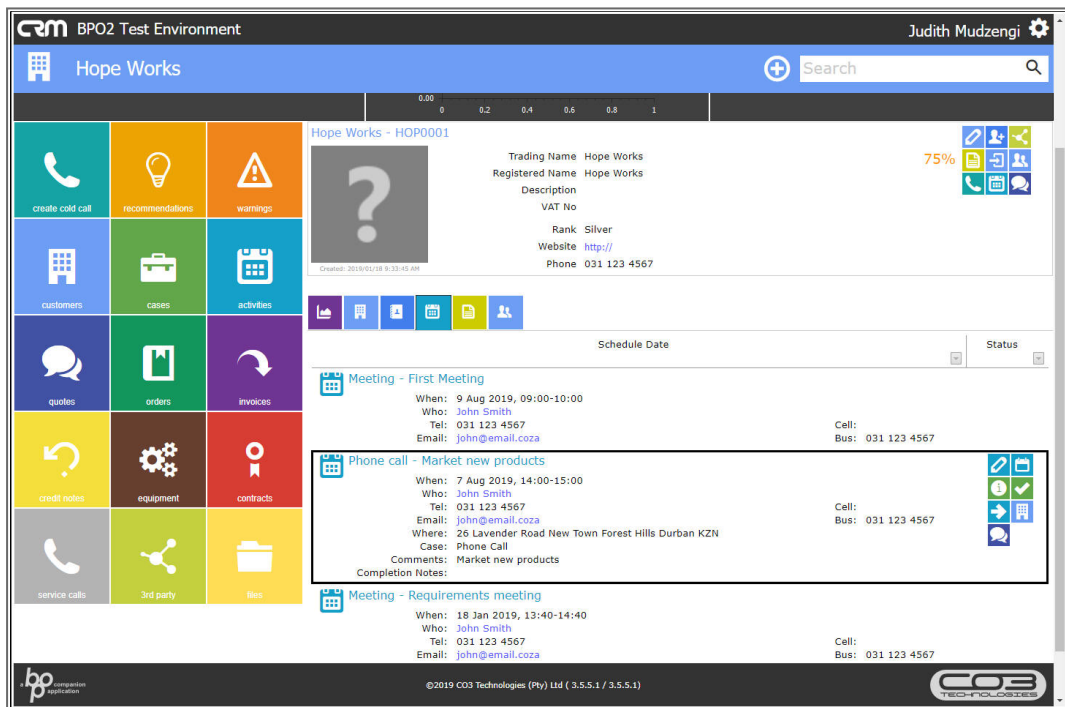
Created: 2018/01/28 9:33:45 AM

Activities:

- Meeting - First Meeting
  - When: 9 Aug 2019, 09:00-10:00
  - Who: John Smith
  - Tel: 031 123 4567
  - Email: [john@email.co.za](mailto:john@email.co.za)
  - Cell: 031 123 4567
  - Bus: 031 123 4567
- Phone call - Market new products
  - When: 7 Aug 2019, 14:00-15:00
  - Who: John Smith
  - Tel: 031 123 4567
  - Email: [john@email.co.za](mailto:john@email.co.za)
  - Cell: 031 123 4567
  - Bus: 031 123 4567
- Meeting - Requirements meeting
  - When: 18 Jan 2019, 13:40-14:40
  - Who: John Smith
  - Tel: 031 123 4567
  - Email: [john@email.co.za](mailto:john@email.co.za)
  - Cell: 031 123 4567
  - Bus: 031 123 4567

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- More details of the selected open activity will be displayed.



**CRM BPO2 Test Environment** Judith Mudzengi

**Hope Works** Search

**Hope Works - HOP0001**

Trading Name Hope Works  
Registered Name Hope Works  
Description  
VAT No  
Rank Silver  
Website <http://>  
Phone 031 123 4567

75%

Created: 2018/01/28 9:33:45 AM

Activities:

- Meeting - First Meeting
  - When: 9 Aug 2019, 09:00-10:00
  - Who: John Smith
  - Tel: 031 123 4567
  - Email: [john@email.co.za](mailto:john@email.co.za)
  - Cell: 031 123 4567
  - Bus: 031 123 4567
- Phone call - Market new products
  - When: 7 Aug 2019, 14:00-15:00
  - Who: John Smith
  - Tel: 031 123 4567
  - Email: [john@email.co.za](mailto:john@email.co.za)
  - Cell: 031 123 4567
  - Bus: 031 123 4567
  - Where: 26 Lavender Road New Town Forest Hills Durban KZN
  - Case: Phone Call
  - Comments: Market new products
  - Completion Notes:
- Meeting - Requirements meeting
  - When: 18 Jan 2019, 13:40-14:40
  - Who: John Smith
  - Tel: 031 123 4567
  - Email: [john@email.co.za](mailto:john@email.co.za)
  - Cell: 031 123 4567
  - Bus: 031 123 4567

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CRM.002.016