

We are currently updating our site; thank you for your patience.

# **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.

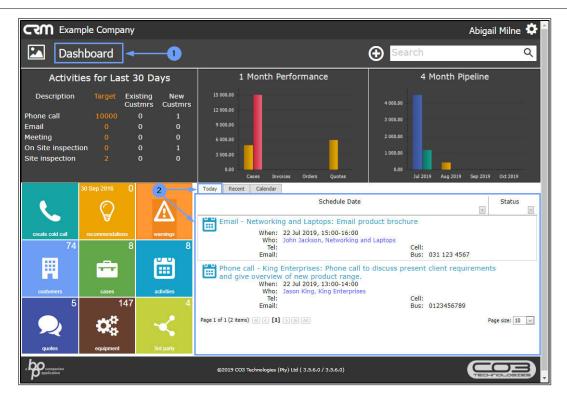
All activities that were due on the current day, but <u>not</u> actioned, will show up in your Warnings the following day.

**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 🌣 🕯							
Dashboard	0	Search Q					
Activities for Last 30 Days	1 Month Performance	4 Month Pipeline					
DescriptionTargetExisting CustmrsNew CustmrsPhone call1000001Email000Meeting000On Site inspection001Site inspection200	15 000.00 12 000.00 9 000.00 6 000.00 3 000.00	4 000.00					
30 Sep 2016 0 4	Cases Invoices Orders Quotes Today Recent Calendar Schedule Date	Jul 2019 Aug 2019 Sep 2019 Oct 2019 Status					
create cold call recommendations warnings	Email - Networking and Laptops: Email product When: 22 Jul 2019, 15:00-16:00 Who: John Jackson, Networking and Lap Tel: Email:						
customers cases activities	Phone call - King Enterprises: Phone call to disc and give overview of new product range. When: 22 Jul 2019, 13:00-14:00 Who: Jason King, King Enterprises Tel:	Cell: Bus: 0123456789					
😞 📽 ≺	Email: Page 1 of 1 (2 items) @ < [1] > >> All	BUS: 0123436789 Page size: 10 v					
quotes equipment 3rd party	@2019 CO3 Technologies (Pty) Ltd ( 3.5.6.0 / 3.5.6.0)						

### **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						Abigail Milne 🍄 🕯
🔼 Dashb	ooard				🕀 Search	Q
Activities for Last 30 Days			ays	1 Month Performance	4 Month Pipeline	
Description Phone call Email Meeting On Site inspection Site inspection	10000 0 0 2	Existing Custmrs 0 0 0 0 0	New Custmrs 1 0 1 1 0	15 000.00 12 000.00 9 000.00 3 000.00 0.00 Cases Invoices Orders Quotes	4 000.00 3 000.00 2 000.00 1 000.00 6.00 Jul 2019 Aug 2019	Sep 2019 Oct 2019
<b>S</b>	Sep 2016 Contraction Cases	8	amings 8 Evivities 4	Today       Recent       Calendar         Schedule Date         Image: Email - Networking and Laptops: Email 1         When:       22 Jul 2019, 15:00-16:00         Who:       Lohn Jackson, Networking Tel:         Email:       Image: Email 1         Phone call - King Enterprises: Phone call and give overview of new product range When:       22 Jul 2019, 13:00-14:00         Whe:       Jason King, King Enterprise Email:         Page 1 of 1 (2 items)       Image: [1] > 10 ml	and Laptops Cell: Bus: 031 123 45 to discuss present client requ	irements
quotes	equipment	31	rd party	©2019 CO3 Technologies (Pty) Ltd ( 3.5.6.0 / 3.5.6.0)		

- 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

Help v2024.5.0.7/1.0 - Pg 6 - Printed: 21/08/2024

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