

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.

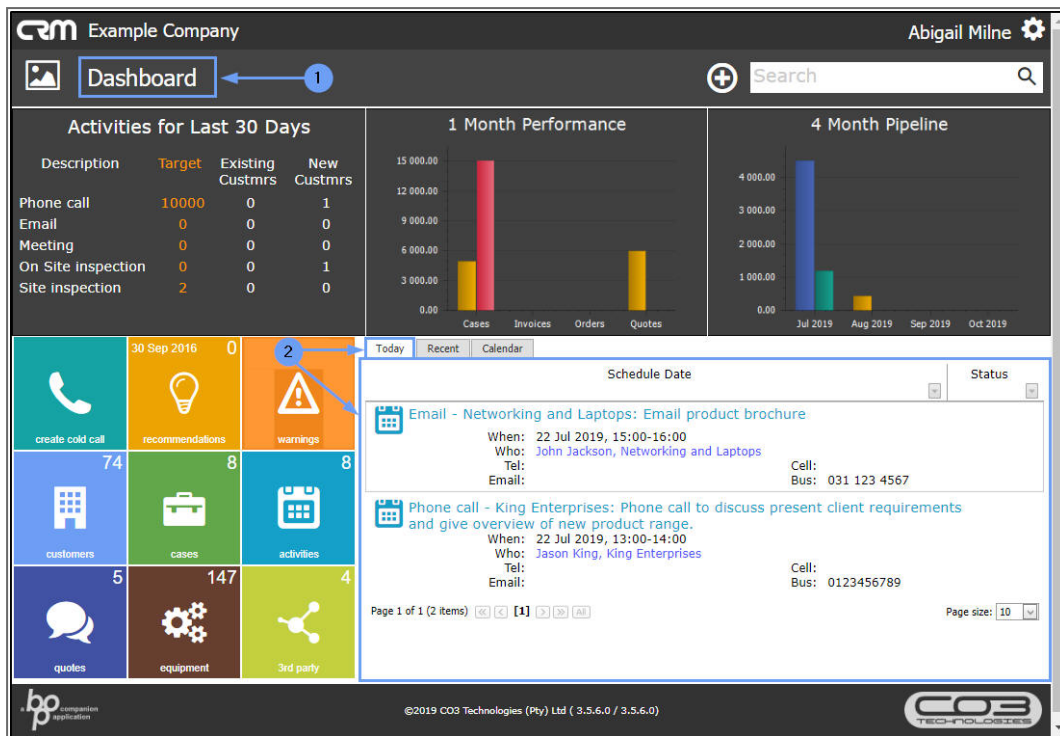
As you work through your activities and complete them, they will be **removed** from the list.

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

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

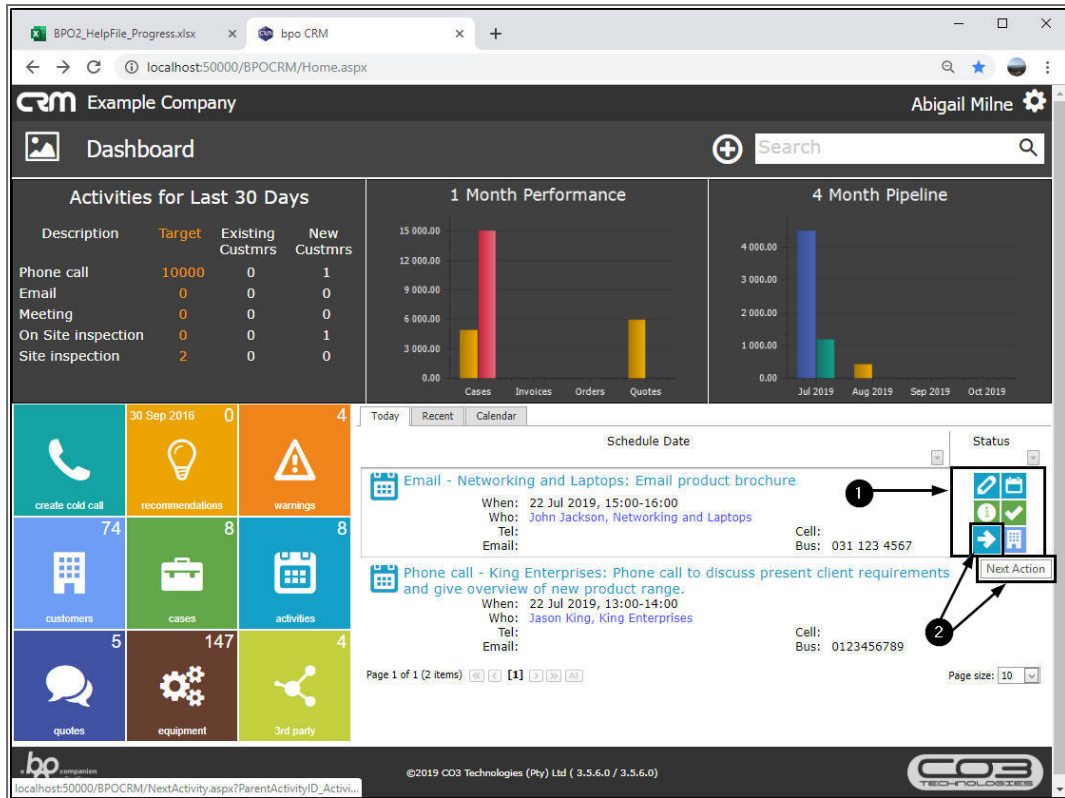
SELECT THE TODAY TAB

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



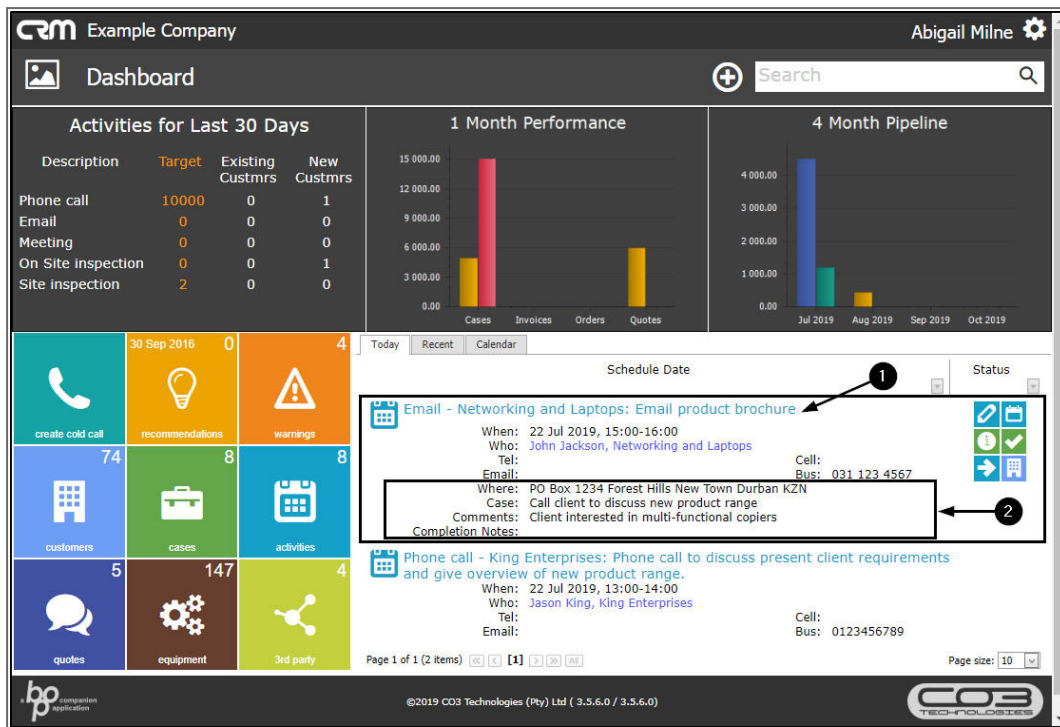
DISPLAY THE ACTION BUTTONS

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.



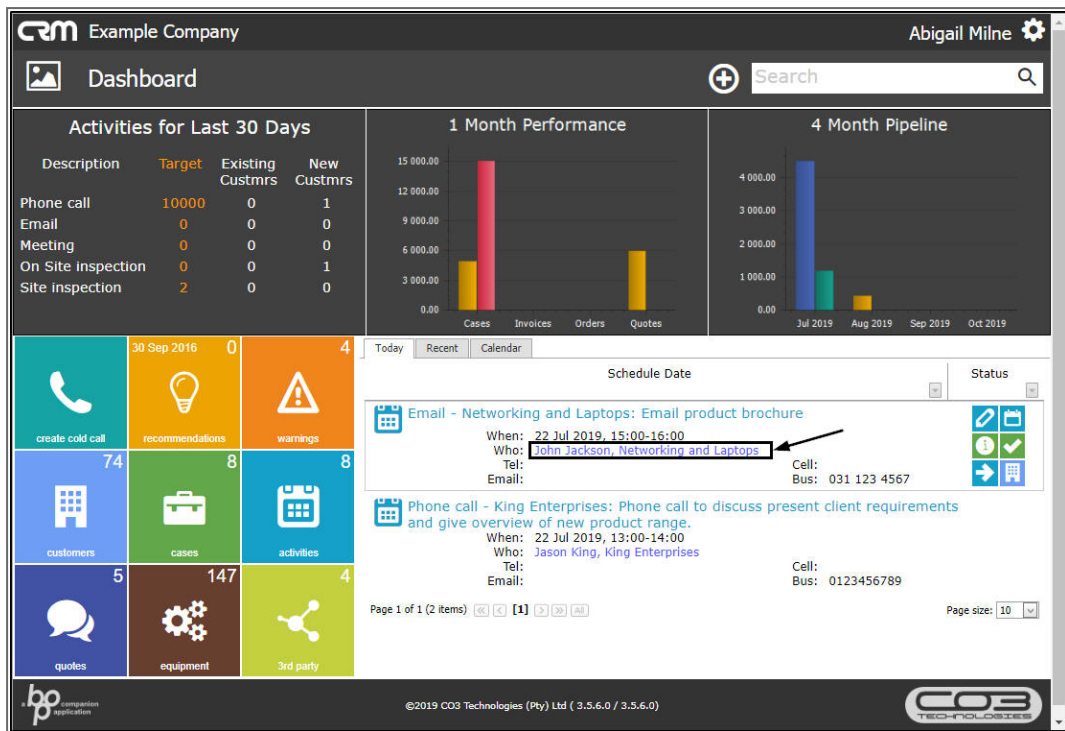
ACTIVITY QUICK VIEW SUMMARY

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.



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