

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

CRM CUSTOMERS

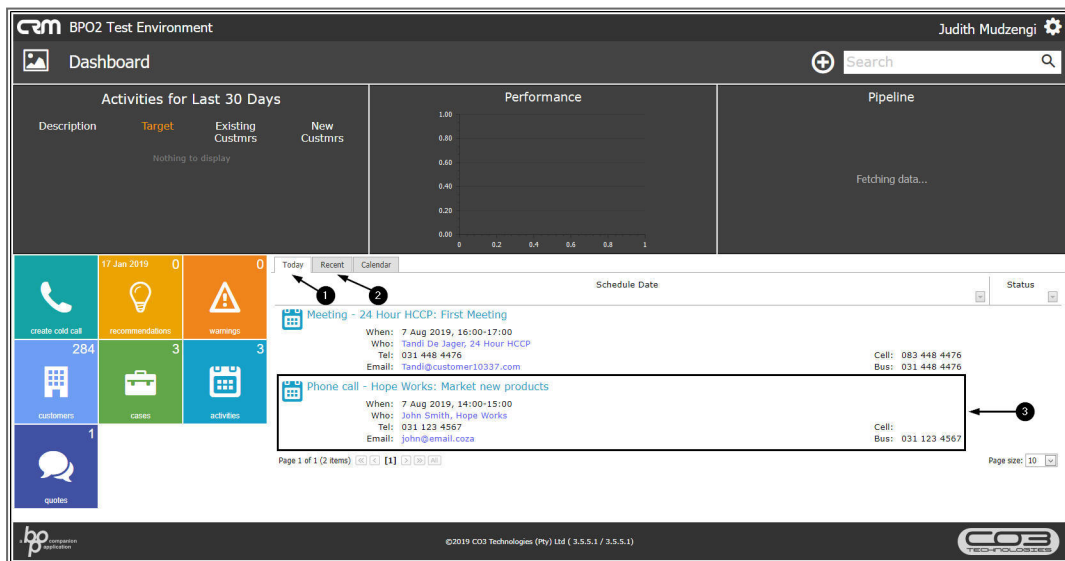
OPEN ACTIVITIES

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

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

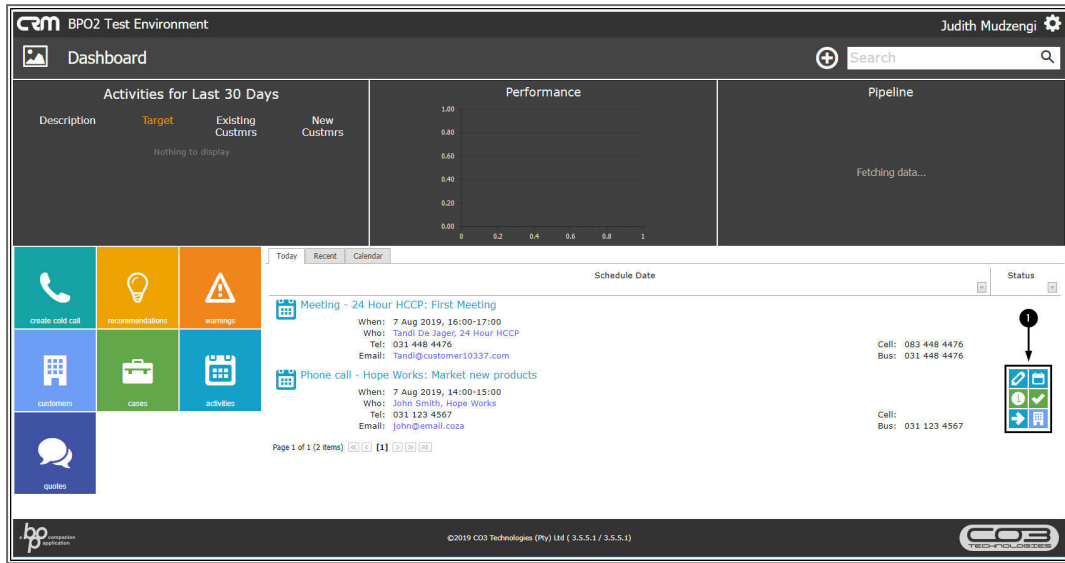
OPEN ACTIVITIES

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.

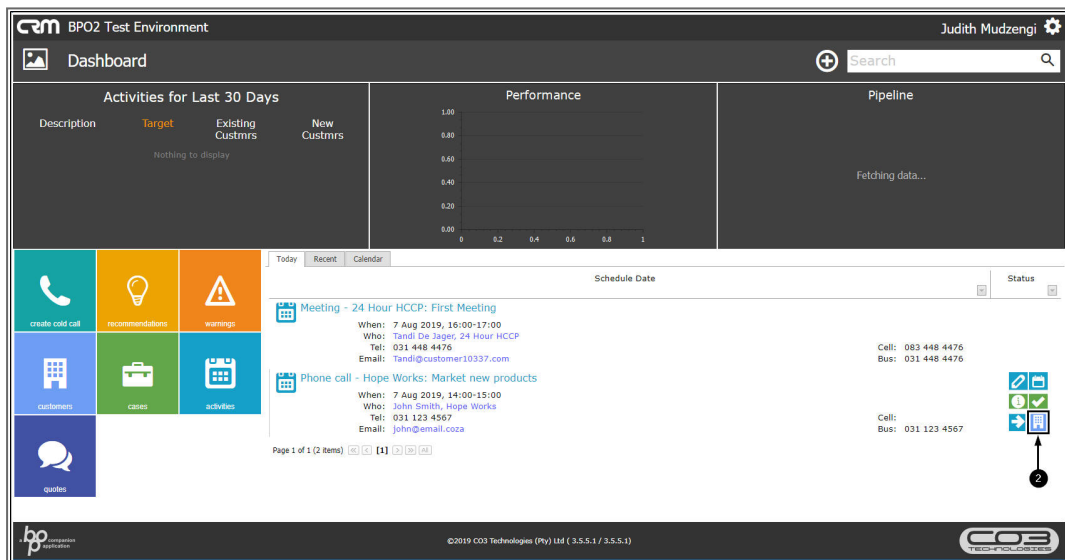


The screenshot displays the CRM BPO2 Test Environment dashboard. At the top, there's a search bar and a user profile for Judith Mudzengi. The main dashboard area is divided into several sections: 'Activities for Last 30 Days' (a table with columns for Description, Target, Existing Custmrs, and New Custmrs), 'Performance' (a line chart), and 'Pipeline' (a section showing 'Fetching data...'). Below these, there's a 'Today' tab selected, which shows a list of activities. A specific activity is highlighted, showing details for a meeting and a phone call. The interface includes various icons for actions like 'create cold call', 'recommendations', 'warnings', 'customers', 'calls', 'activities', and 'quotes'. The bottom of the screen shows the CO3 Technologies logo and version information.

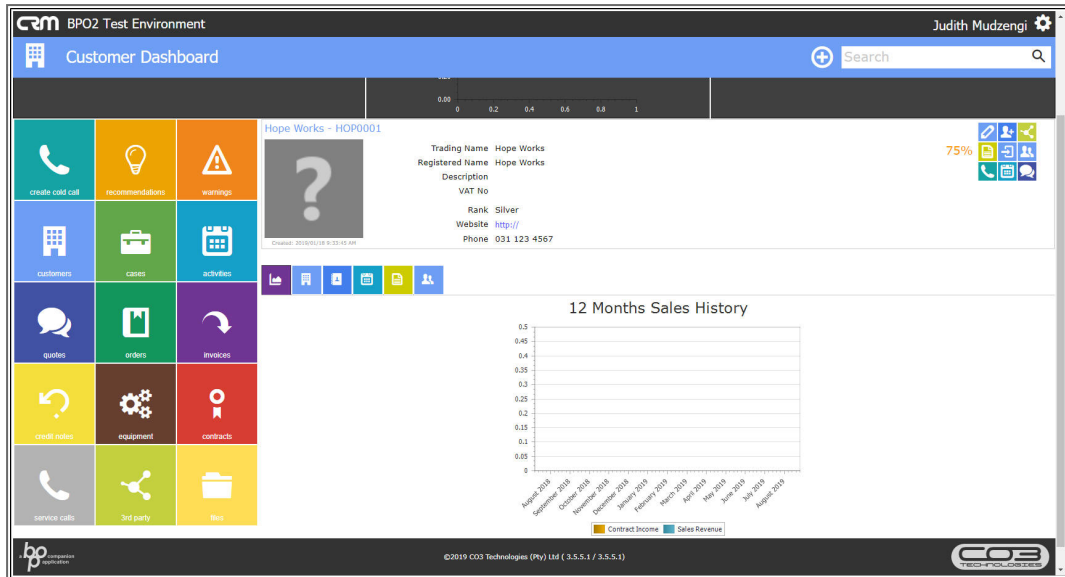
1. **Action icons** will be displayed to the right of the customer activity you are hovering over.



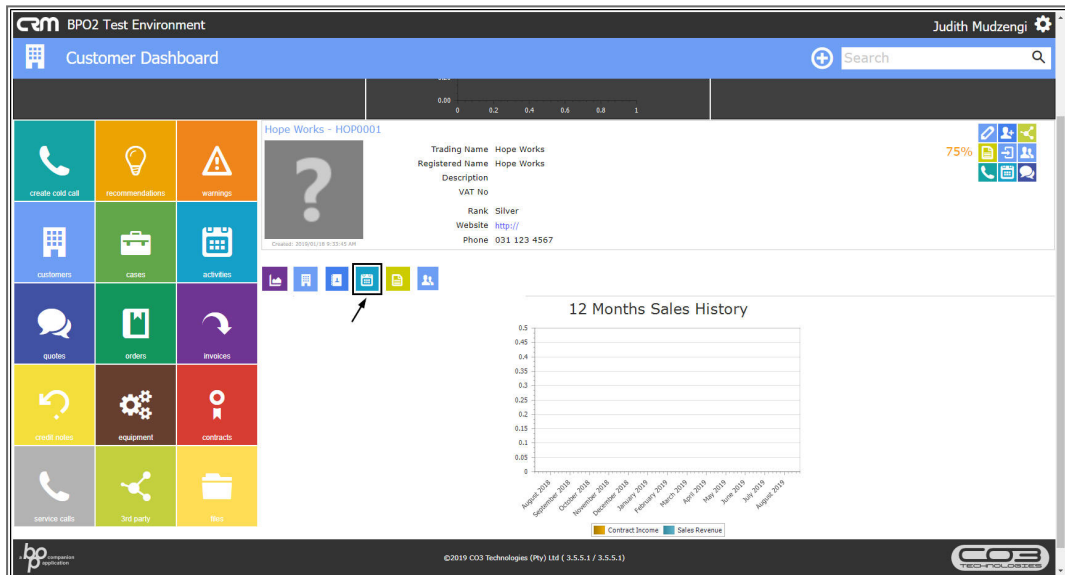
2. Click on the **View Customer** icon.



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



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



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

SORTING DATA

- BPO2 Test Environment

Judith Mudzengi

Customer Dashboard

create cold call

recommendations

warnings

customers

cases

activities

quotes

orders

invoices

credit notes

equipment

contracts

service calls

3rd party

files

Hope Works - HOP0001

Trading Name Hope Works

Registered Name Hope Works

Description VAT No

Rank Silver

Website <http://>

Phone 031 123 4567

Created: 2019/03/18 9:33:45 AM

Schedule Date

Status

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

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

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

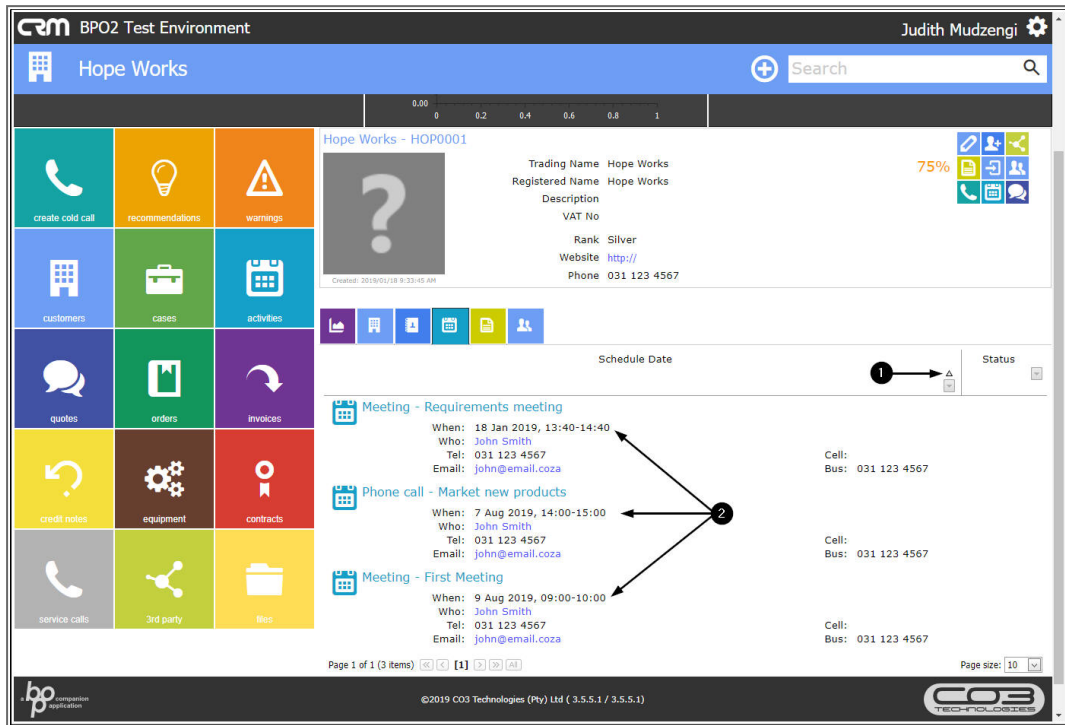
Cell: 031 123 4567

Bus: 031 123 4567

bp integration application

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

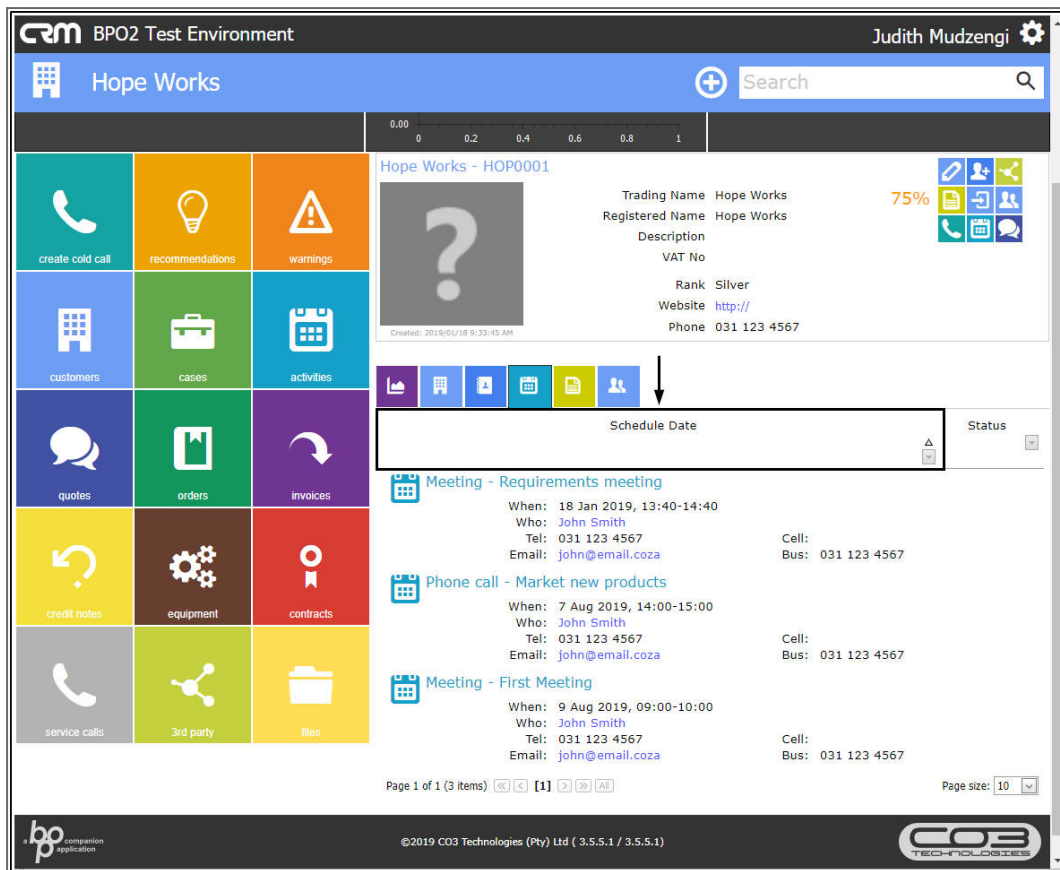


The screenshot displays the CO3 CRM interface for a customer named 'Hope Works'. The left sidebar contains various functional icons like 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The main area shows the customer's details, including trading name, registered name, VAT No, rank, website, and phone number. Below this, a list of activities is shown, sorted by 'Schedule Date'. The activities are:

- Meeting - Requirements meeting (When: 18 Jan 2019, 13:40-14:40)
- Phone call - Market new products (When: 7 Aug 2019, 14:00-15:00)
- Meeting - First Meeting (When: 9 Aug 2019, 09:00-10:00)

The 'Schedule Date' column header is highlighted with a circled '1' and an arrow pointing to it. A circled '2' is placed over the activity list, with arrows pointing to the dates of the three activities: '18 Jan 2019', '7 Aug 2019', and '9 Aug 2019'.

- 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 'Hope Works' with a progress indicator at 0.00 and a search icon.

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.

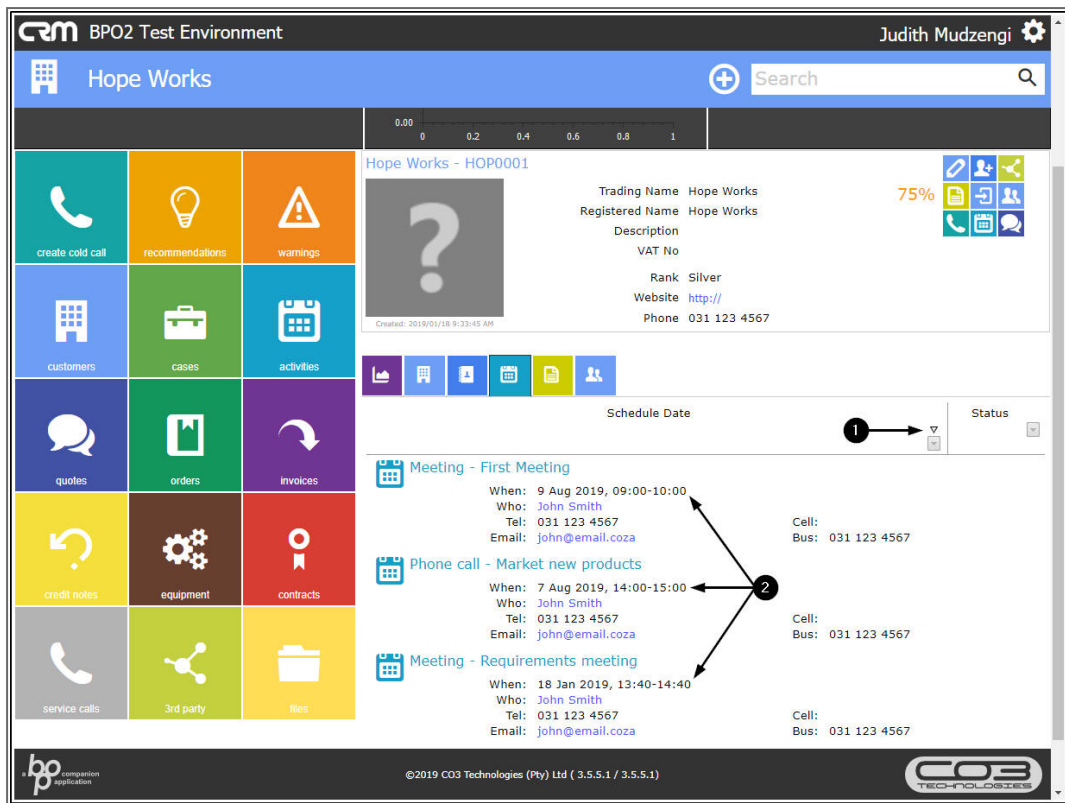
The main content area shows the 'Hope Works - HOP0001' profile. It includes a profile picture placeholder with a question mark, a 'Created' timestamp of '2019/01/18 9:33:15 AM', and a list of details: Trading Name (Hope Works), Registered Name (Hope Works), Description, VAT No, Rank (Silver), Website (http://), and Phone (031 123 4567). A '75%' progress indicator is also visible.

Below the profile, there is a 'Schedule Date' dropdown menu and a 'Status' dropdown menu. The activities list shows three items:

- 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; 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; Cell: 031 123 4567; Bus: 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; Bus: 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 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

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

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

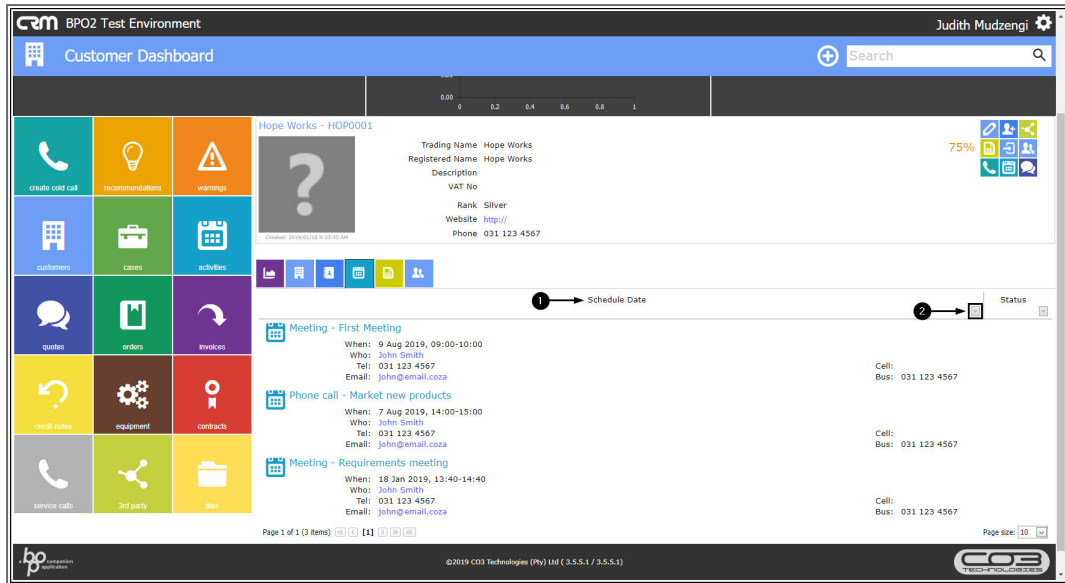
Cell: 031 123 4567
Bus: 031 123 4567

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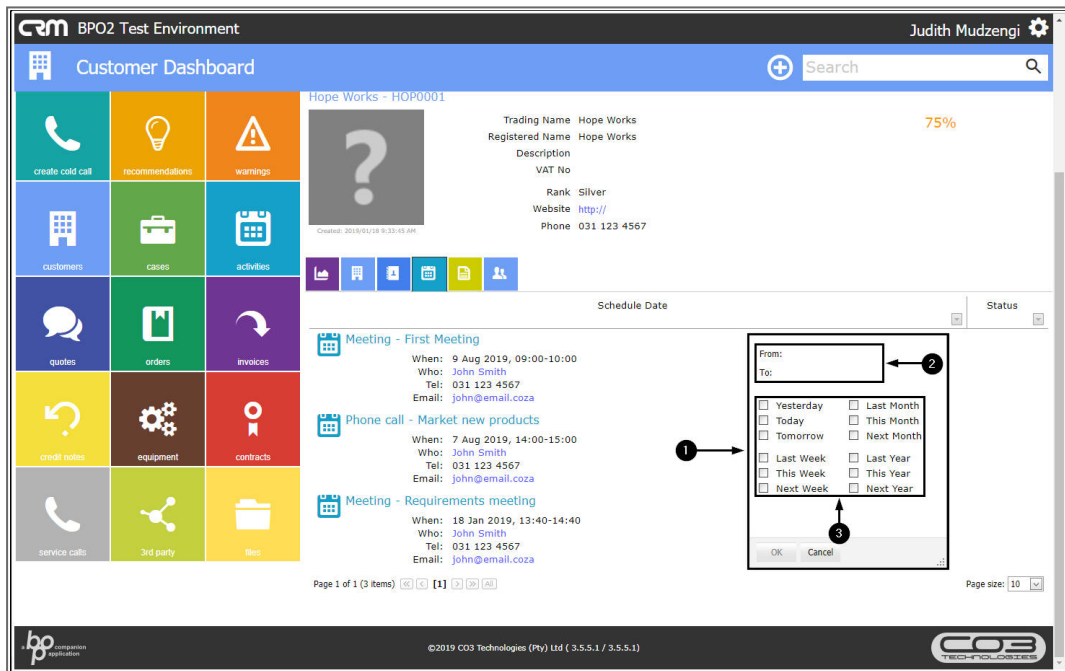
FILTER OPEN ACTIVITIES BY SCHEDULE DATE

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

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

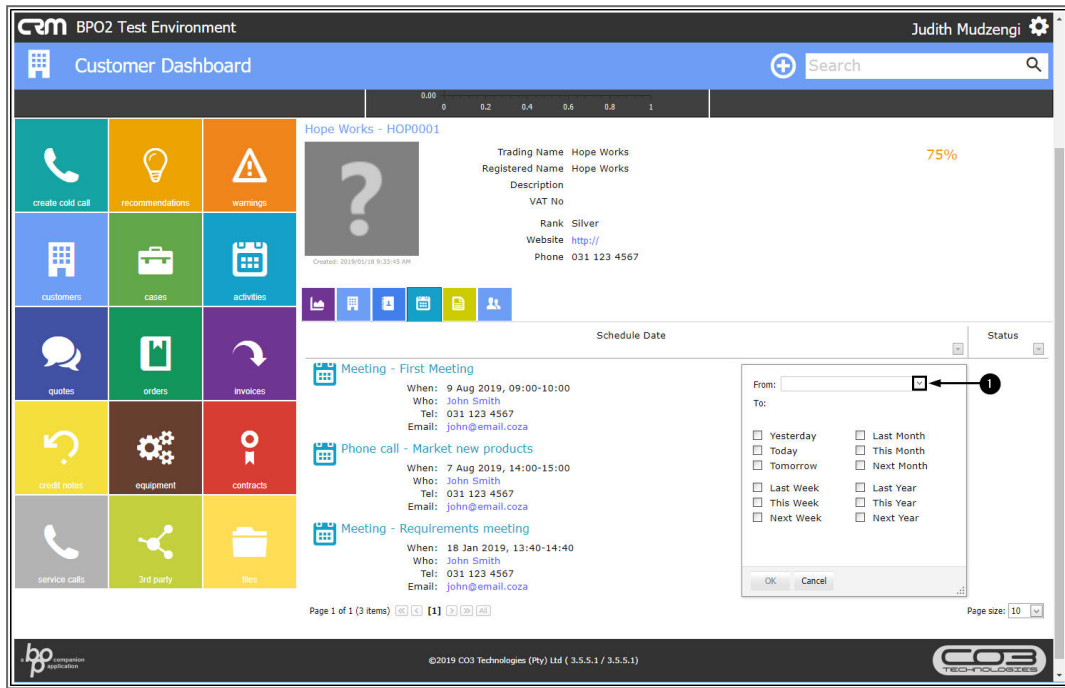


1. A **menu** will be displayed.
2. You can either filter by **Date Range** or
3. **Timeline**.

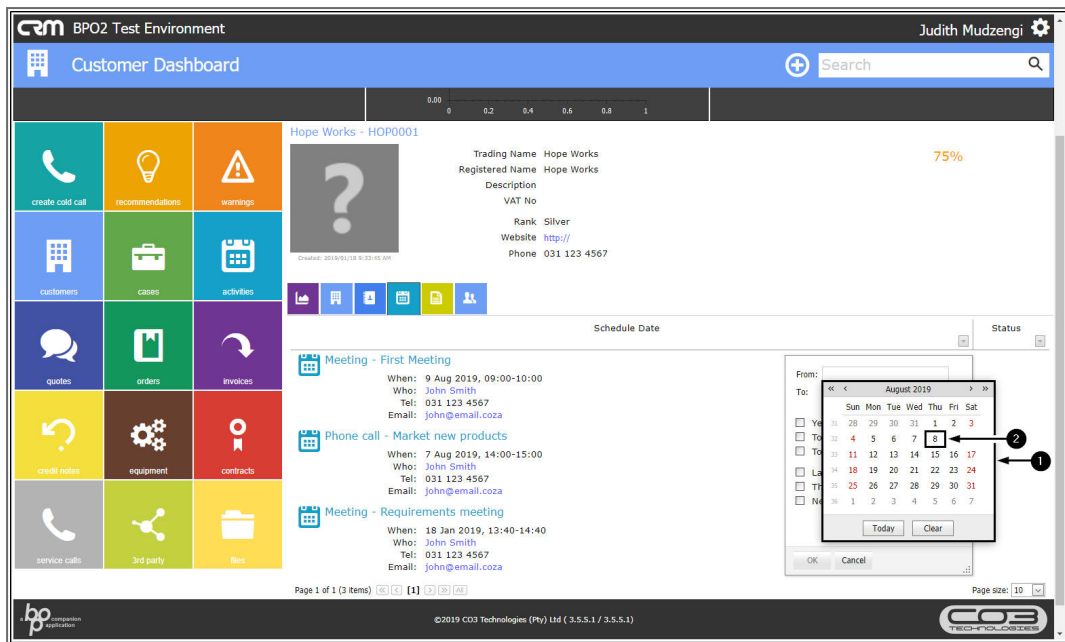


FILTER BY DATE RANGE

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



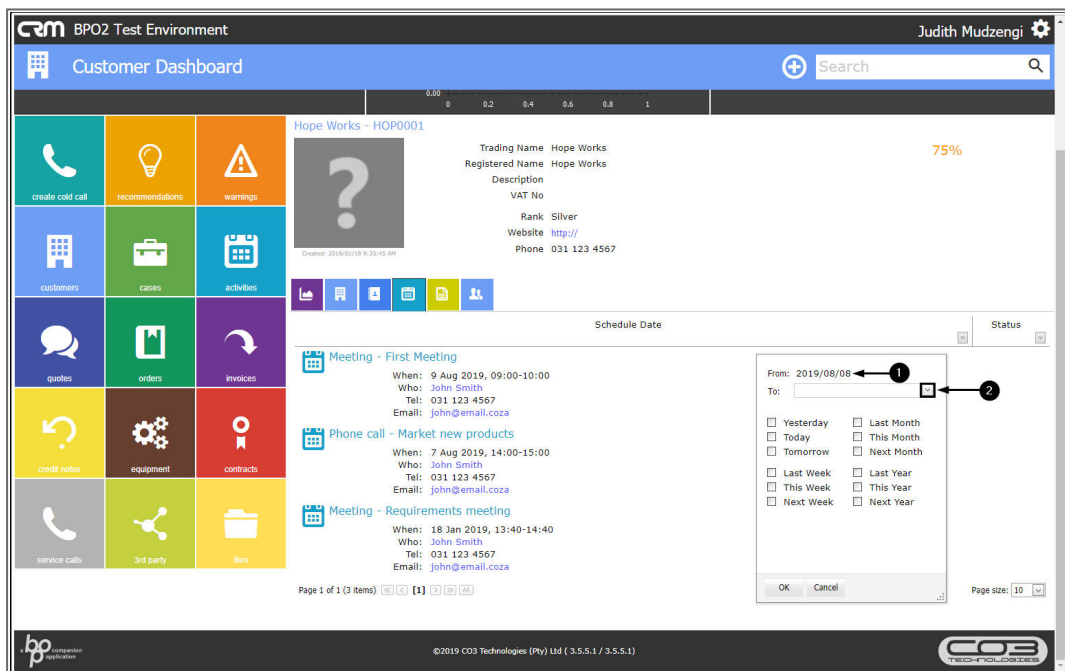
1. A **calender** will be displayed.
2. Select the relevant date.



The screenshot shows the CRM BPO2 Test Environment Customer Dashboard. The 'From' field in the 'Schedule Date' section is open, displaying a calendar for August 2019. The date 8 is selected, and a down arrow is visible next to the 'To' field. The dashboard also displays a list of activities for 'Hope Works - HOP0001'.

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

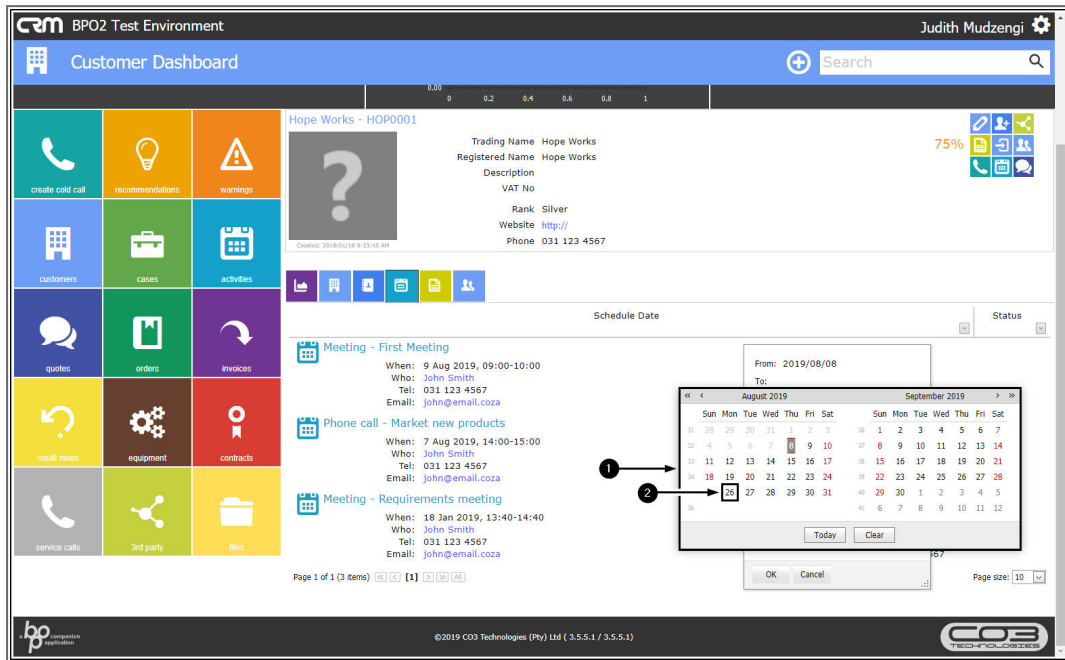
1. The **From** field will be populated with the selected date.
2. Hover over the **To** field, a **down arrow** will be displayed.
3. Click on the **down arrow**.



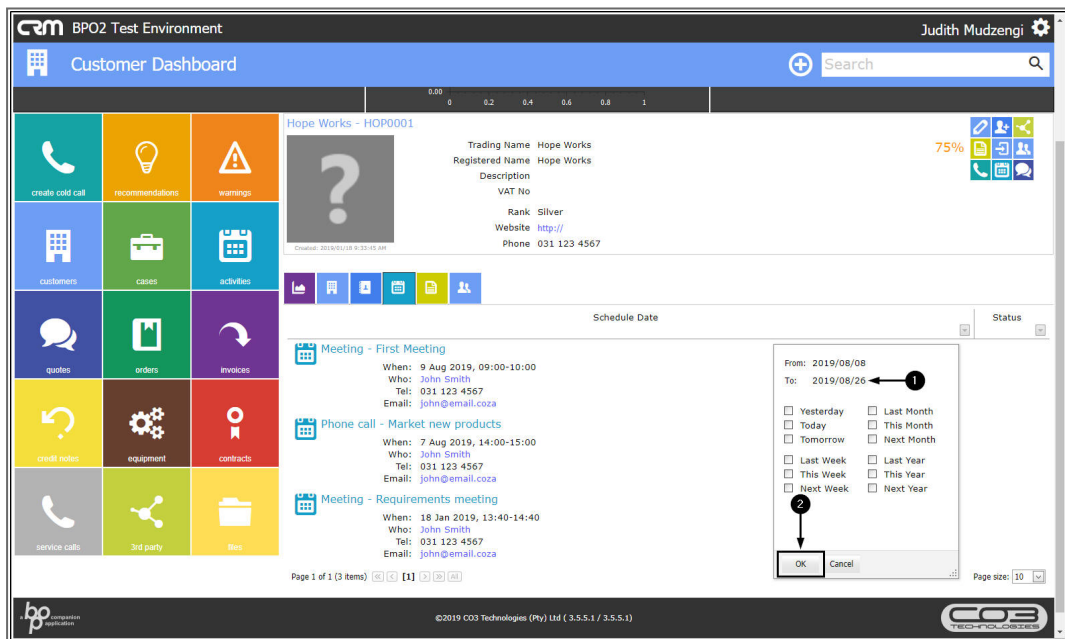
The screenshot shows the CRM BPO2 Test Environment Customer Dashboard. The 'To' field in the 'Schedule Date' section is open, displaying a date selection menu. The date 2019/08/08 is selected, and a down arrow is visible next to the 'To' field. The dashboard also displays a list of activities for 'Hope Works - HOP0001'.

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

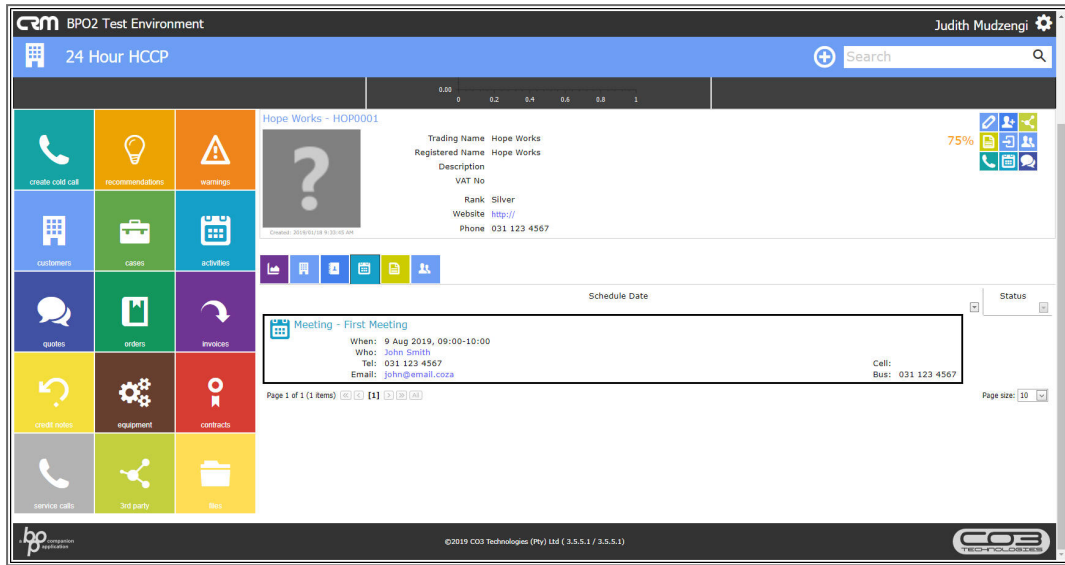
1. A **calender** will be displayed.
2. Select the relevant date.



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

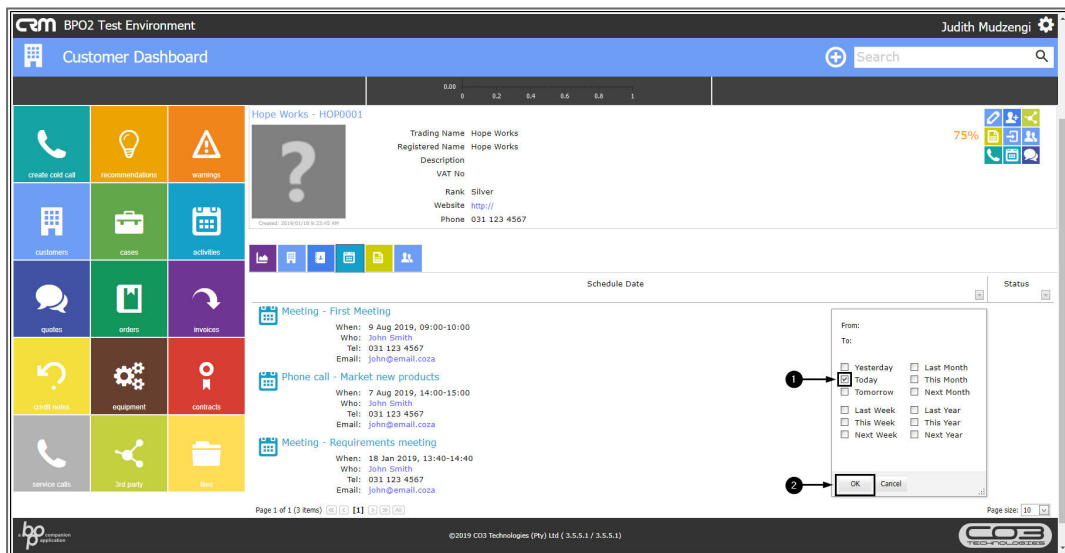


- Only open activities that fall within the selected date range will be displayed.

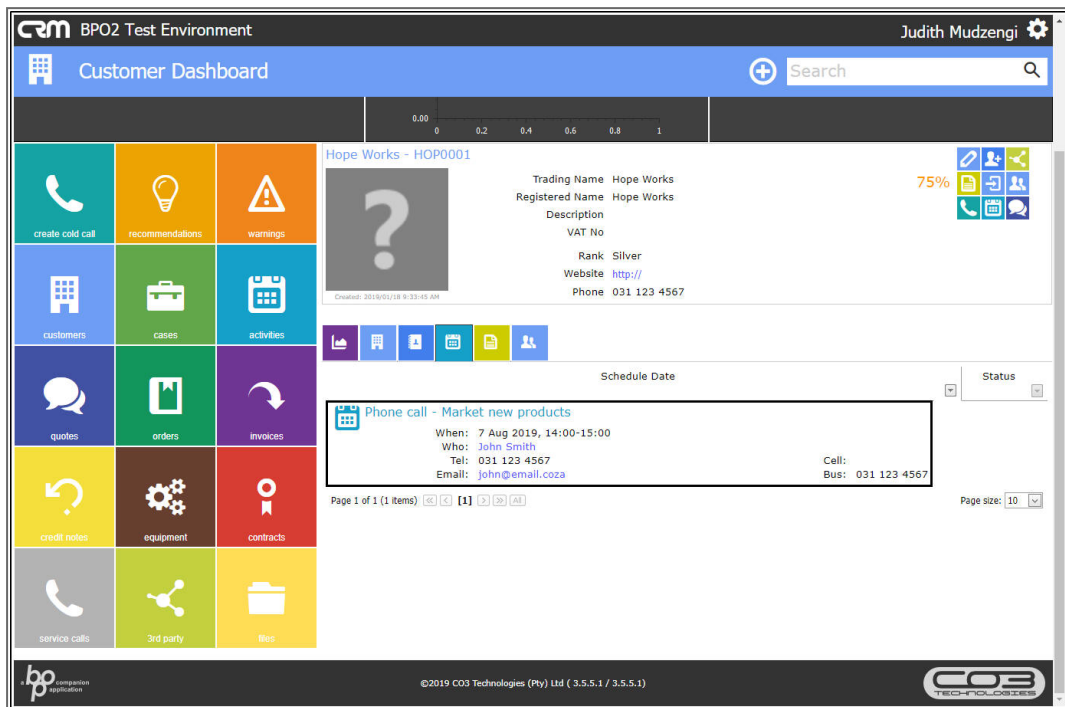


FILTER BY TIMELINE

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



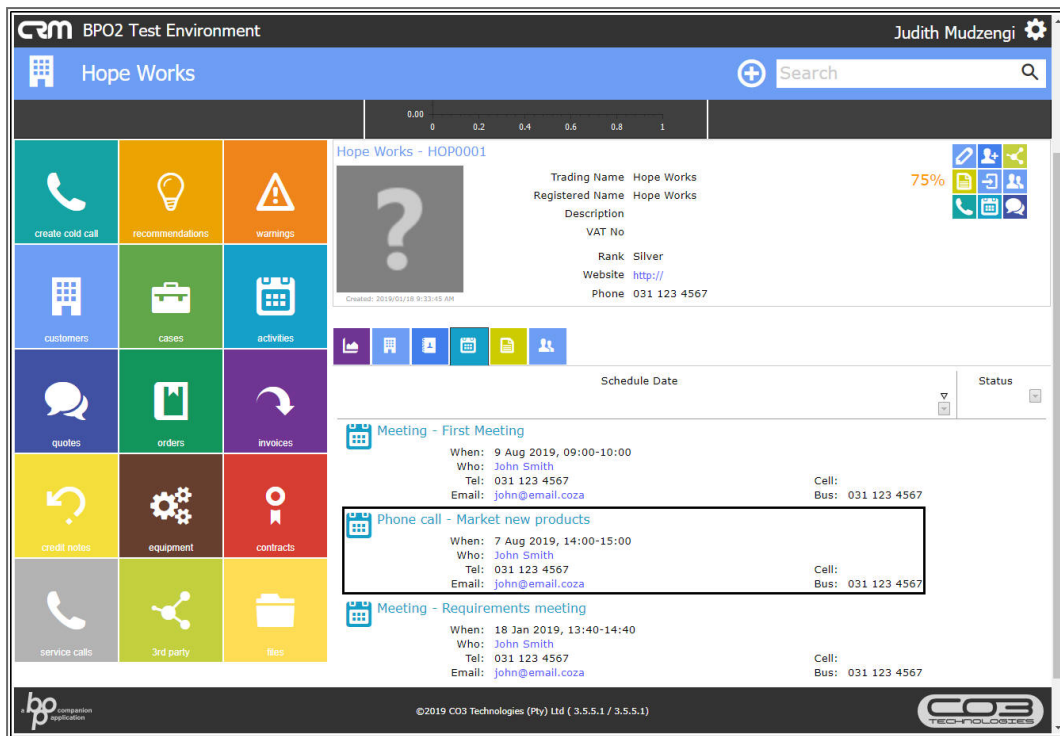
- Only open activities that fall within the selected timeline will be displayed.



The screenshot displays the CRM BPO2 Test Environment Customer Dashboard. The top navigation bar includes the CRM logo, 'BPO2 Test Environment', the user name 'Judith Mudzengi', and a search bar. The main dashboard area is divided into a left sidebar with 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 a customer profile for 'Hope Works - HOP0001' with details such as Trading Name, Registered Name, Description, VAT No, Rank (Silver), Website, and Phone. A progress bar indicates 75% completion. Below the profile, a list of activities is shown, including a 'Phone call - Market new products' scheduled for 7 Aug 2019, 14:00-15:00, with contact details for John Smith. The bottom of the dashboard shows the CO3 Technologies logo and version information.

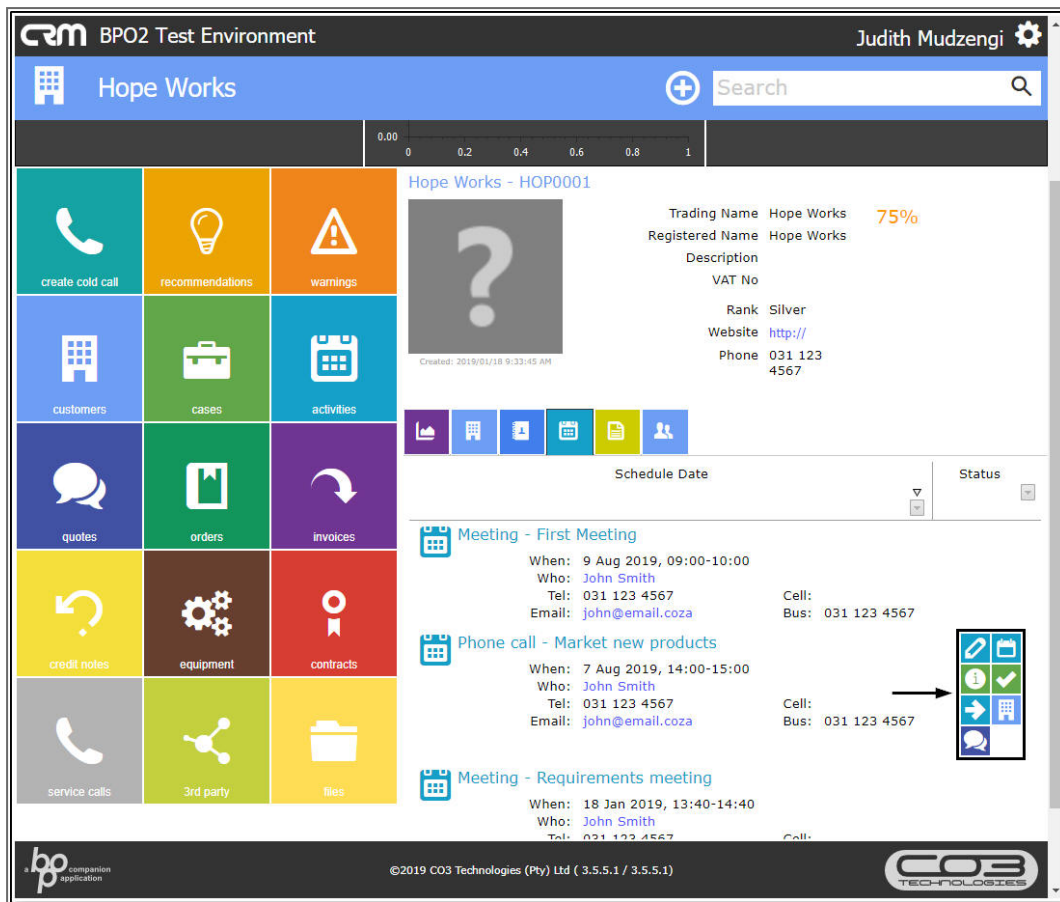
ACTION ITEMS

- Hover over an open activity.



The screenshot displays the 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 action items: 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 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 activities is shown, including 'Meeting - First Meeting', 'Phone call - Market new products', and 'Meeting - Requirements meeting', each with details on when, who, and contact information.

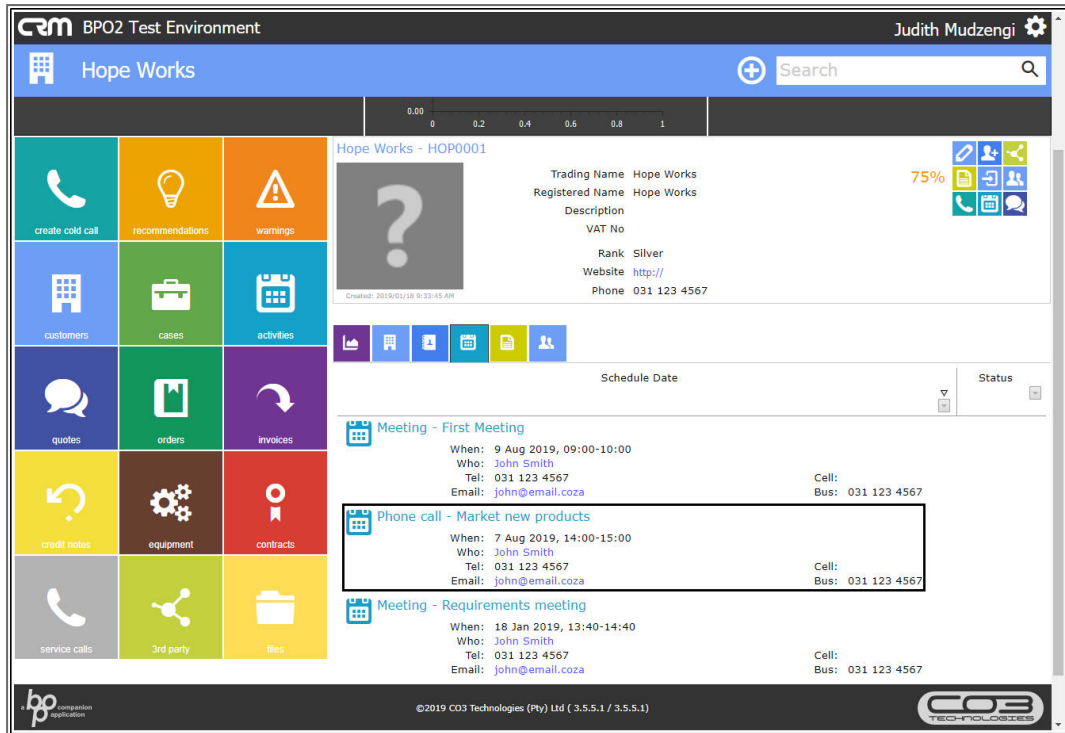
- The following action items will be displayed:
 - Reschedule this Activity
 - View / Edit Activity
 - Close this Case
 - View Case Info and History
 - View Customer
 - Next Action (close current activity and create new activity)
 - Create new Quote



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, Website, and Phone. Below this, a list of activities is shown, including 'Meeting - First Meeting', 'Phone call - Market new products', and 'Meeting - Requirements meeting'. Each activity entry includes the date, time, and participants. A small icon set on the right side of the activities list allows for further actions.

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%

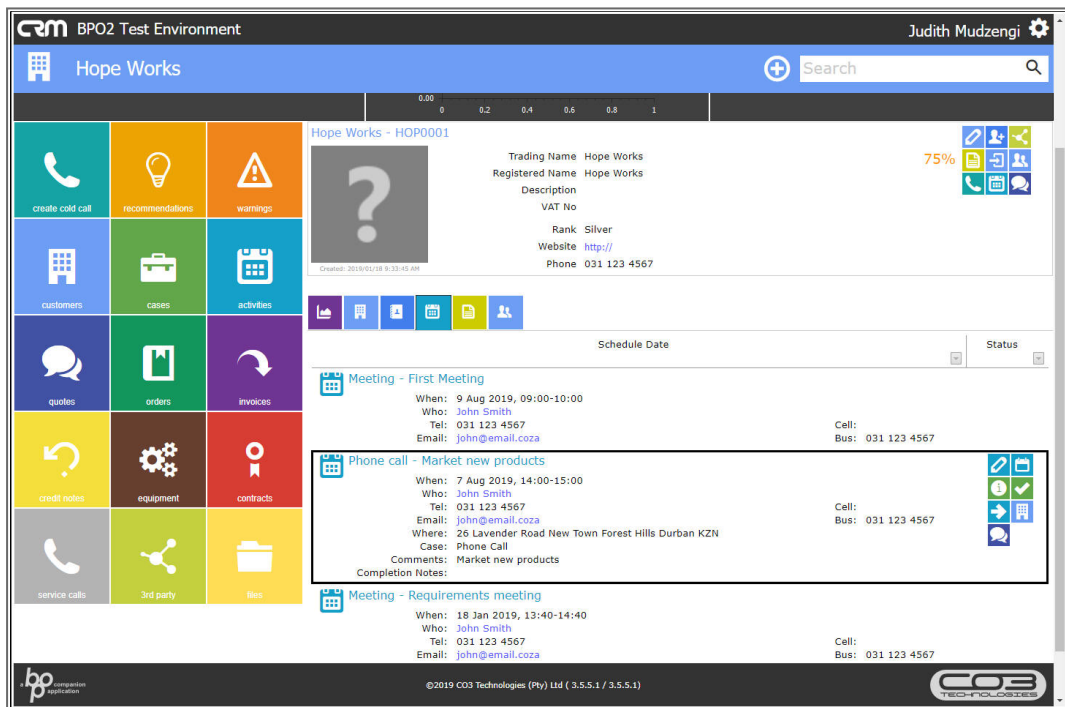
Created: 2018/01/28 9:33:45 AM

Activities:

- Meeting - First Meeting
 - When: 9 Aug 2019, 09:00-10:00
 - Who: John Smith
 - Tel: 031 123 4567
 - Email: john@email.co.za
 - 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
 - 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
 - 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
 - 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
 - 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
 - Cell: 031 123 4567
 - Bus: 031 123 4567

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CRM.002.016