

CRM BASICS

ACTIVITIES TARGET VERSUS ACTUAL

Your Activities Summary will indicate your Target Activities vs Completed Activities for the last [30] days the amount of days are configurable according to your company requirements. The completed activities are split between Existing BPO Clients and New Customers.

The default Activity Types are: Meeting, Email, Phone Call and Site Inspection. These can be configured according to your company requirements.

Access: Webpage - http://[servername]:[portno]/BPOCRM/User.aspx

- 1. In the CRM *Homepage*,
- 2. Click in the *Activities for the Last 30 Days* summary frame.



CCM Example Company Abigail Milne 🌣						
🖾 Das	hboard]	-1		2 🕀 Sea	rch Q
Activitie	es for La	ist 30 D	ays	~	1 Month Performance	4 Month Pipeline
Description Phone call Email Meeting On Site inspection Site inspection	Target 10000 0 0 0 2	Existing Custmrs 0 0 0 0 0	New Custmrs 0 0 1 1	15 000.00 12 000.00 9 000.00 6 000.00 3 000.00 0.00	1 506.00 1 296.00 906.00 306.00 306.00	
create cold call 74 customers 5 Q quotes	30 Sep 2016	lations 7 147 ≱	xannings activities Coloradores Sicil party	7	Cases Invoices Orders Quotes Recent Calendar Schedule Date Phone call - King Enterprises: Phone call to direquirements and give overview of new prodution who: 22 Jul 2019, 13:00-14:00 Who: 22 Jul 2019, 13:00-14:00 Who: Jason King, King Enterprises Tel: Email: Meeting - Young Designs: Meeting set up for : Whe: 22 Jul 2019, 11:00-12:00 Who: 22 Jul 2019, 11:00-12:00 Who: 22 Jul 2019, 11:00-12:00 F1: 987654321 Email: 50 All	ict range. Cell: Bus: 0123456789
				©2019	203 Technologies (Pty) Ltd (3.5.6.0 / 3.5.6.0)	

ACTIVITIES FOR THE LAST 30 DAYS PAGE

- 1. A report of your *Activities for the Last 30 Days* will open.
- 2. The graph in this page will display:
 - Actual activities for <u>new</u> customers in the last 30 days
 - Actual activities for <u>existing</u> customers in the last 30 days
 - The Target figures for each activity for the last 30 days (e.g. the target figure for Phone Calls in this example is 10,000 in 30 days).
- 3. The lower half of the page contains a frame that lists the customers linked to these activities.
- 4. Click on the *Status* drop-down arrow.



STATUS MENU

Example Co	s for Last	: 30 Day	s 🗕	-0			←	Milne
11000 10000 9000 8000 7000 6000 5000 4000 3000 2000 1000 1000	Phone call	Enail			Steinspection	Actual for New Customers Actual for Existing Customes Target]	4
Ţ∟			Meeting Schedule Dat	On Site inspection				Status
Who:	24 Jun 2019, 09 Paul Young, Your 987654321	:00-11:00	l installation of	3 machines		Cell: Bus: 987654321		size: 10

- 1. The Status menu will appear, this will default to **All** (<u>All</u> customers with linked activities in the last 30 days will be displayed in this frame).
- 2. You can type in the *filter row* to filter by specific text e.g. a customer / contact name.
- 3. You can select to filter by customers with *completed* activities.



CCM Example Company			Abigail Milne 🍄 🕯
Activities for Last	30 Days		🔶 🖪 🔶
11000 9000 8000 7000 6000 4000 2000 1000 0 Phone call	Email Meeting On Site inspe	Actual for New CL Actual for Existin Target	
	Schedule Date		Status
On Site inspection - Young Design When: 24 Jun 2019, 09:0 Who: Paul Young, Young Tel: 987654321 Email: Page 1 of 1 (1 items) @ [1] > >> @		es	2 3

TIME PERIOD SELECTION MENU

- 1. Click on the second drop-down arrow.
- 2. A time period selection panel will be displayed.
 - **From**: Either type in or click on the drop-down arrow and use the calendar function to select the filter from date.
 - **To**: Either type in or click on the drop-down arrow and use the calendar function to select the filter to date.
- 3. You can also select the applicable *check box(es)* to filter by e.g. Select

Week or Last Month.

- 4. When you have finished selecting the filter options;
 - Either select **OK** to save the changes,
 - Or select *Cancel* to annul the changes.
- 5. You can *Refresh* this page if required.
- 6. Click on the *Back* button to return to the previous page.



CCM Example Company		Abigail Milne 🍄
Activities for	Last 30 Days	↓ ← ○
11000 10000 9000 8000 7000 6000 5000 4000 3000 2000 1000 0	Phone call Email Meeting On Steinspr	Actual for New Customers Actual for Desting Customers Target 6 5 5 6 5 5 5 5 5 5 5 5 5 5 5 5 5
	Schedule Date	Status v
When: 24 Jun 2		

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