

## 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.

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**Access:** Webpage - [http://\[servername\]:\[portno\]/BPOCRM/User.aspx](http://[servername]:[portno]/BPOCRM/User.aspx)

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

**CRM Example Company** | Abigail Milne

**Dashboard** | Search

Description	Target	Existing Custmrs	New Custmrs
Phone call	10000	0	0
Email	0	0	0
Meeting	0	0	0
On Site Inspection	0	0	1
Site inspection	2	0	0

**1 Month Performance**

**4 Month Pipeline**

Today | Recent | Calendar

Schedule Date | Status

Phone call - King Enterprises: Phone call to discuss present client requirements and give overview of new product range.  
 When: 22 Jul 2019, 13:00-14:00  
 Who: Jason King, King Enterprises  
 Tel: [redacted] Cell: 0123456789

Meeting - Young Designs: Meeting set up for 25th July with Purchasing Manager  
 When: 22 Jul 2019, 11:00-12:00  
 Who: Paul Young, Young Designs  
 Tel: 987654321 Cell: 987654321

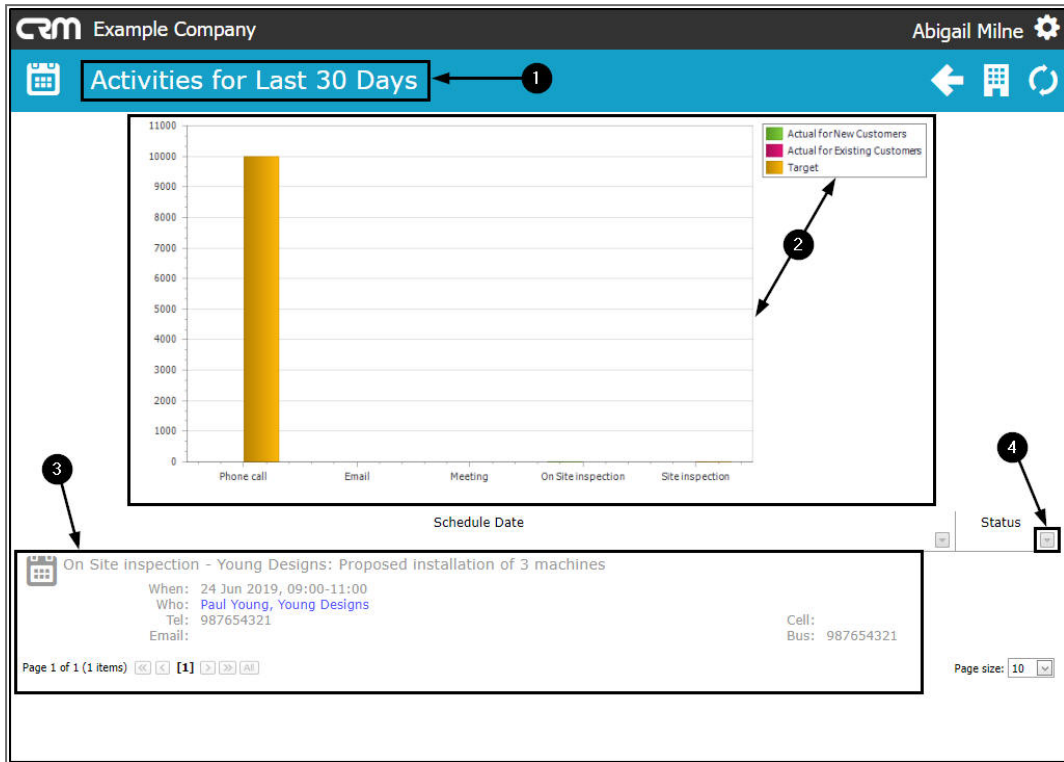
Page 1 of 1 (2 items) | Page size: 10

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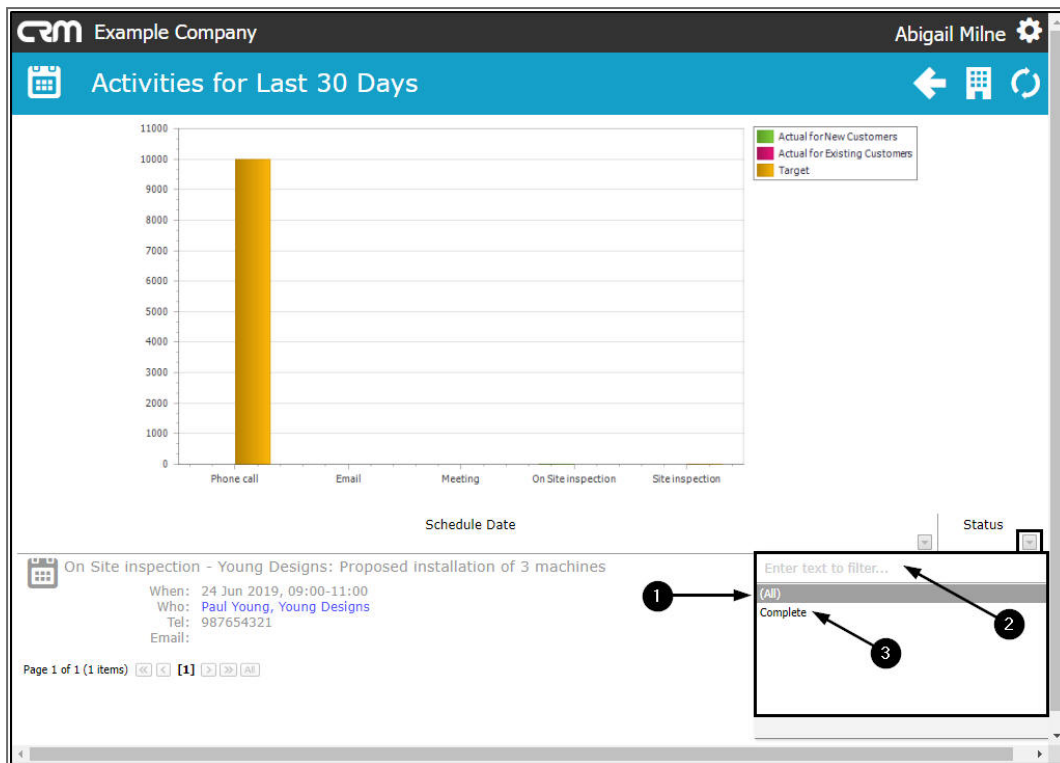
## ACTIVITIES FOR THE LAST 30 DAYS PAGE

1. A report of your **Activities for the Last 30 Days** will open.
2. The graph in this page will display:
  - Actual activities for new customers in the last 30 days
  - Actual activities for existing 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

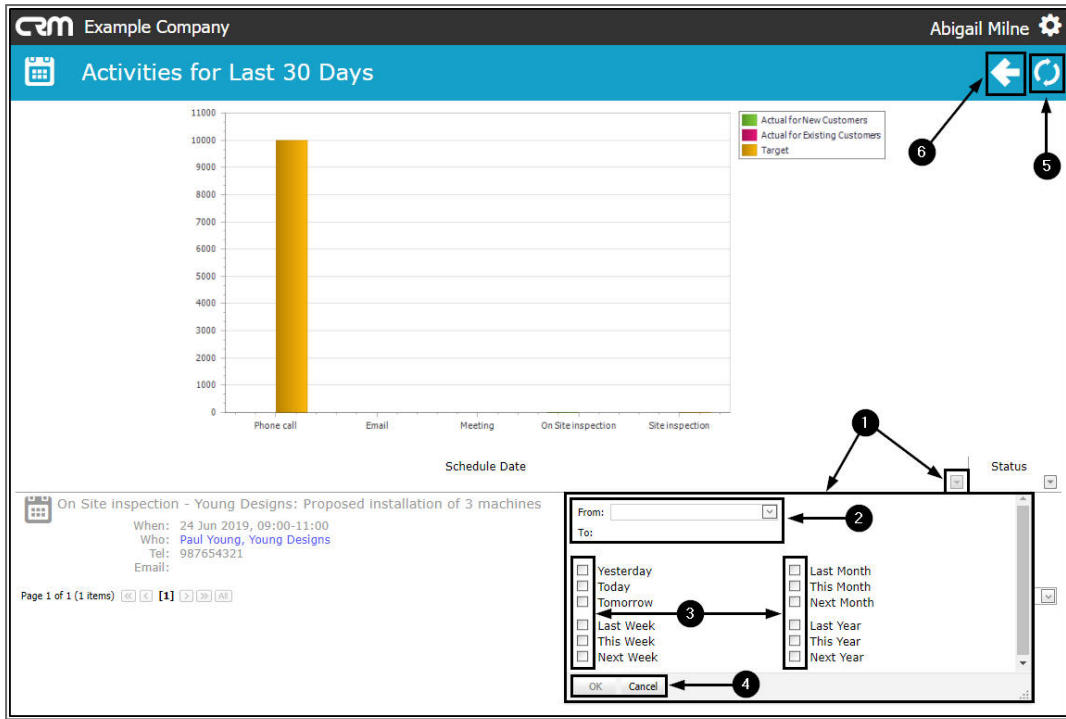


1. The Status menu will appear, this will default to **All** (All customers with linked activities in the last 30 days will be displayed in this frame).
2. You can type in the **filter row** to filter by specific text e.g. a customer / contact name.
3. You can select to filter by customers with **completed**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



## 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.



CRM.000.007

