

# CRM ACTIVITIES

## CALENDAR

Your calendar will display all scheduled activities.

You can change your calendar display to view: Day, Work Week, Week, Month, Timeline and Agenda

---

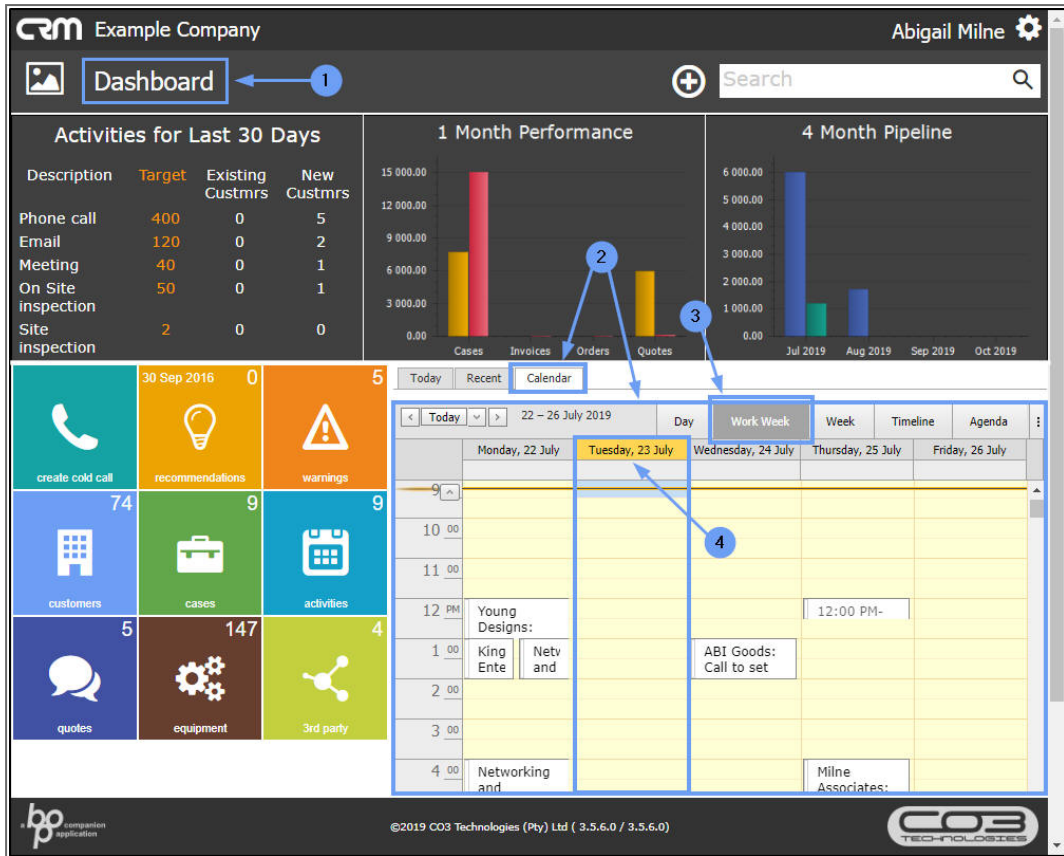
**Ribbon Access:** *Webpage* > `http://[servername]:[port-no]/BPOCRM/User.aspx`

---

## SELECT THE CALENDAR TAB

---

1. In the **Dashboard** (Home page) screen,
2. Ensure that the **Calendar** tab is selected to be able to view activities over the last **7** days.
3. The calendar will open by default to **Work Week** view.
4. The **current day** will be highlighted.



## VIEW PREVIOUS OR FUTURE WEEKS

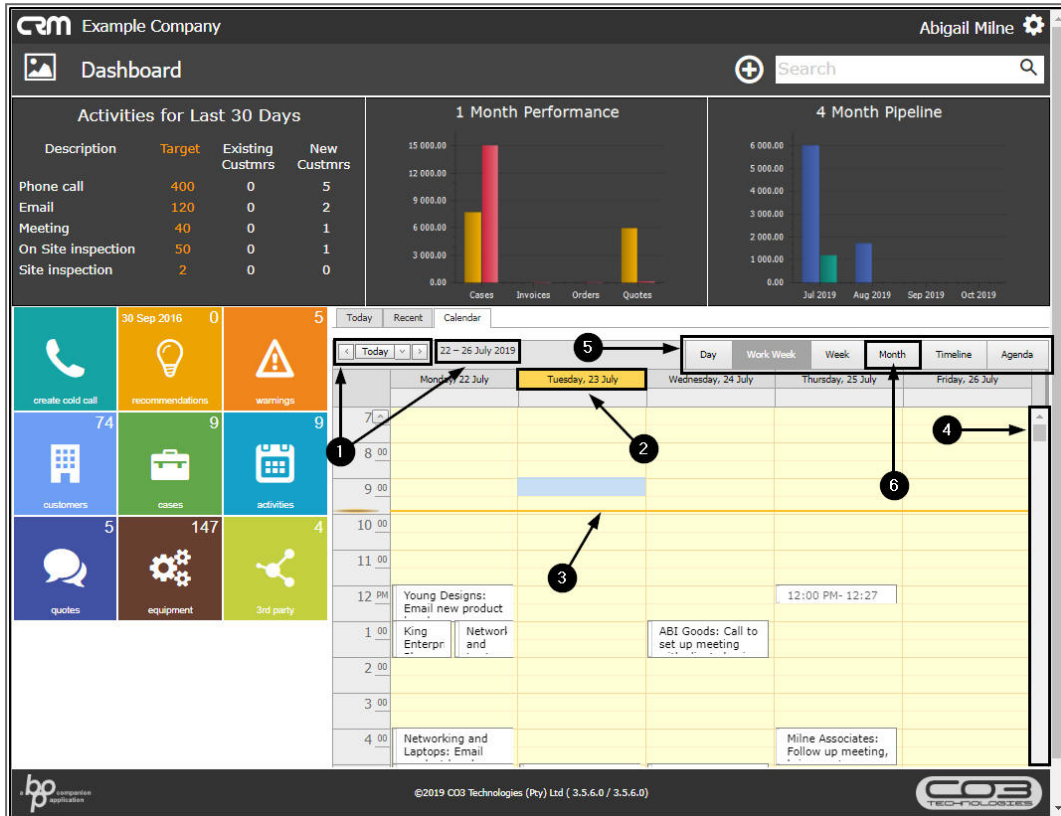
1. Use the **directional arrows** to view previous or future weeks. The **date frame** will display which week you are currently viewing.
2. The **current day** is highlighted.
3. The **orange bar** running across the calendar indicates the current **time** of day e.g. in this example it is 9:55 AM.
4. Use the **scroll bar** if necessary, to view all activities on the calendar.

## CHANGE CALENDAR VIEW

5. Click on the applicable tab to change the view to:
  - Day
  - Work Week

- Week
- Month
- Timeline
- Agenda

6. In this example, **Month** is selected.



1. The calendar frame will now display the **Month** view.
2. Use the **directional arrows** to view previous or future months. The **date frame** will display which month you are currently viewing.
3. The **current day** is highlighted.

## OPEN 'SHOW MORE' LINKS

4. You will note the Show more links in certain days of the month. This indicates that activity information is available here. Click on one of

these links.

The screenshot shows a CRM dashboard for 'Example Company' with user 'Abigail Milne'. It features a 'Dashboard' section with a search bar and three main charts: 'Activities for Last 30 Days', '1 Month Performance', and '4 Month Pipeline'. Below these are several activity tiles with icons and counts. A calendar view is open, showing a grid for July and August 2019. Callout 1 points to the calendar frame, 2 to the scroll bar, 3 to a 'Show more' link on Monday 22nd, and 4 to a 'Show more' link on Wednesday 31st.

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	5
Email	120	0	2
Meeting	40	0	1
On Site Inspection	50	0	1
Site inspection	2	0	0

Category	Value
Cases	~7,000.00
Invoices	~14,000.00
Orders	~6,000.00
Quotes	~6,000.00

Month	Value
Jul 2019	~6,000.00
Aug 2019	~1,000.00
Sep 2019	~1,500.00
Oct 2019	~1,500.00

1. The calendar frame will now open the **Day** view.
2. Use the **scroll bar** if necessary, to view all the hours in the day.
3. This screen will display more detail regarding the day's activity e.g. the Customer Name and Activity description.

## SAVE ACTIVITY SCREEN

- Click on any one of these activities.

**CRM Example Company** | Abigail Milne

**Dashboard** | Search

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	5
Email	120	0	2
Meeting	40	0	1
On Site Inspection	50	0	1
Site inspection	2	0	0

**1 Month Performance**

Category	Value
Cases	~8,000.00
Invoices	~14,000.00
Orders	~6,000.00
Quotes	~6,000.00

**4 Month Pipeline**

Month	Value
Jul 2019	~6,000.00
Aug 2019	~1,000.00
Sep 2019	~2,000.00
Oct 2019	~1,000.00

**Calendar: Wednesday, 24 July**

- 11:00 - 12:00
- 12:00 - 1:00
- 1:00 - 2:00: ABI Goods: Call to set up meeting with clients buying officer
- 2:00 - 3:00
- 3:00 - 4:00
- 4:00 - 5:00
- 5:00 - 6:00: ABI Goods: New Potential contract - copiers
- 6:00 - 7:00

1. The **Save Activity** screen will be displayed.
2. Here you can view all the activity details. You can also **edit** the details here if required, e.g. add another attendee.
3. If you have made any changes, click on **Save**.
4. Or click on **Back** to return to the **Dashboard** (Home page) screen.

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main form is titled 'Save Activity' and contains the following fields:

- Case:** Subject: New Potential contract
- Case State:** \* Case State: Distant prospect - on hold (5%), Percentage: 5%
- Activity:** \* Type: Phone call, Address, \* Subject: Call to set up meeting with clients buying officer, Comments: Need to arrange meeting to present new products
- Activity Attendees:** Attendees: Abigail Milne, Lucy. Page 1 of 1 (2 items) [1] [All]. Send Email Invites:  \*note that invitations can only be sent to attendees with valid email addresses
- Schedule:** Date: 24 Jul 2019, from: 13:00 to 14:00, Reminder: Email , SMS , 30 minutes before scheduled start
- Quote:** (empty)

Numbered callouts in the image:

- 1:** Points to the 'Save Activity' header.
- 2:** Points to the 'Activity' field.
- 3:** Points to the 'Save' button at the bottom of the form.
- 4:** Points to the 'Save' icon in the top right corner of the form area.

CRM.001.003