CRM ACTIVITIES

CALENDAR

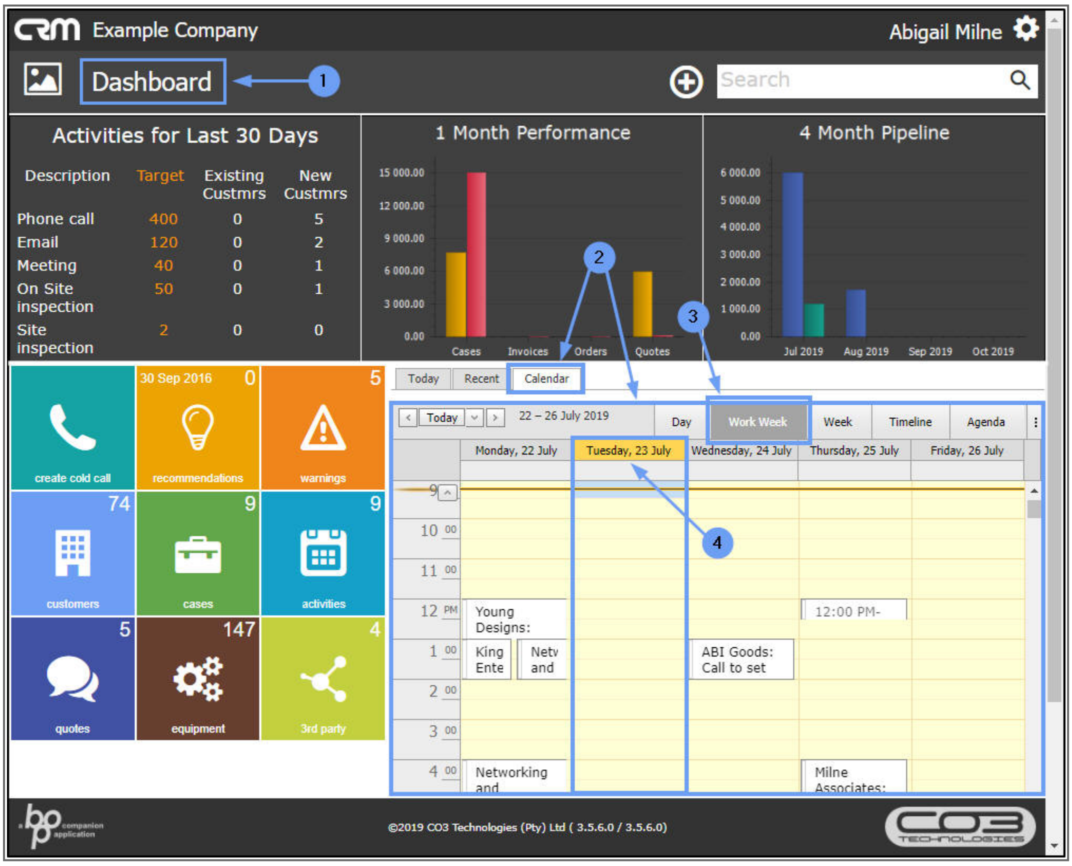
Your calendar will display all scheduled activities.

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**

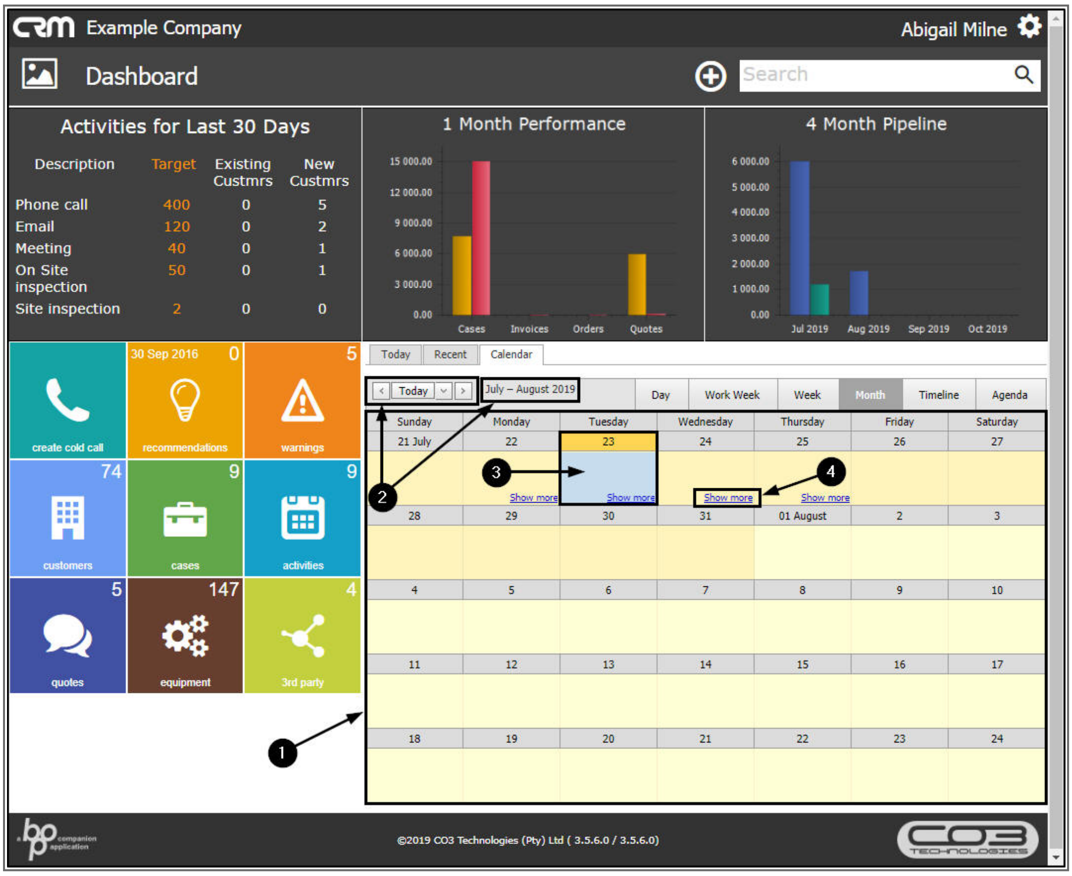
6. In this example, ***Month*** is selected.

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

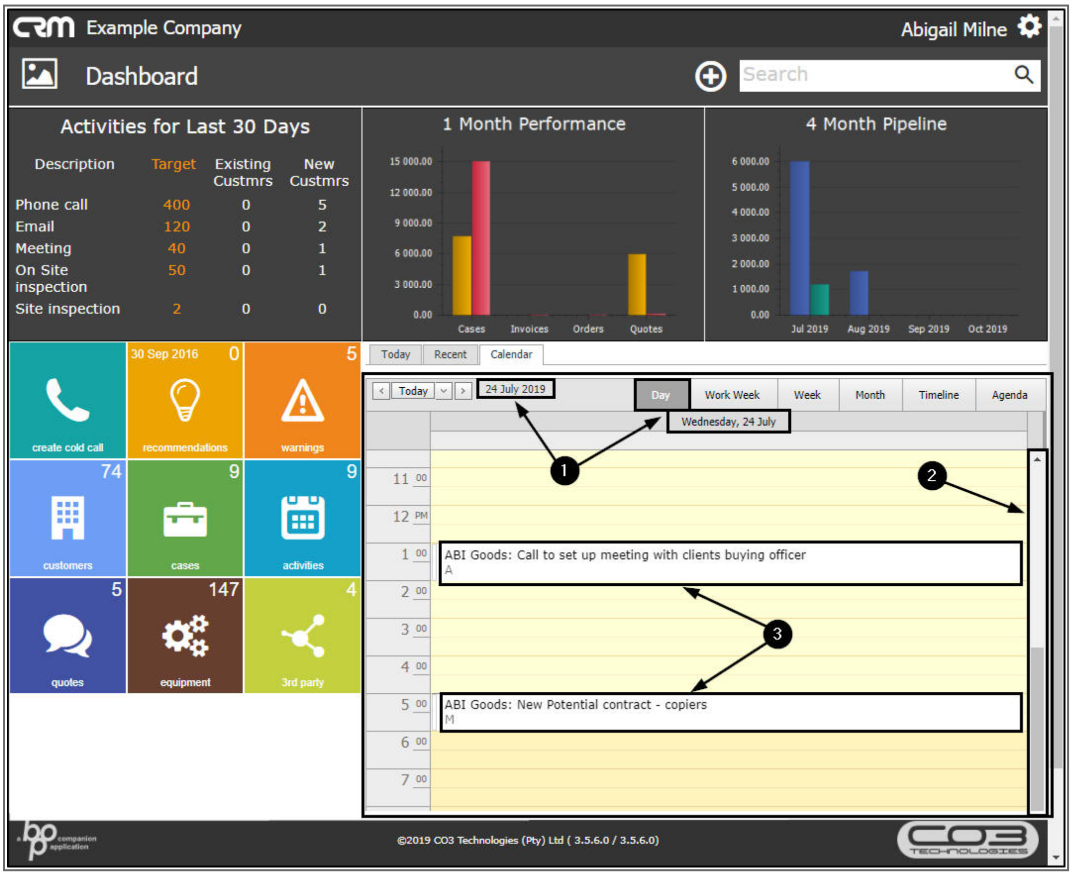
these links.



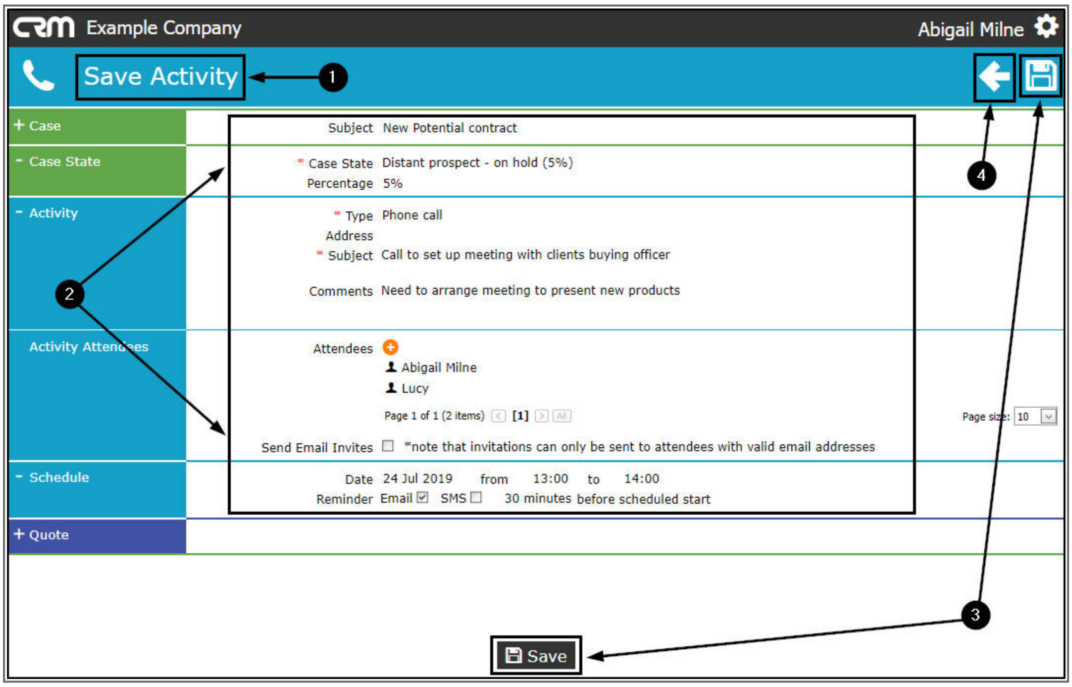
1. The calendar frame will now open the ***Day*** view.
2. Use the ***scroll bar*** if necessary, to view all the hours in the day.
3. This screen will display more detail regarding the day's activity e.g. the Customer Name and Activity description.

SAVE ACTIVITY SCREEN

- Click on any one of these activities.



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.


Example Company
Abigail Milne
Save Activity
1
+ Case
- Case State
- Activity
2
Activity Attendees
- Schedule
+ Quote
Subject New Potential contract
* Case State Distant prospect - on hold (5%)
Percentage 5%
* Type Phone call
Address
* Subject Call to set up meeting with clients buying officer
Comments Need to arrange meeting to present new products
Attendees
Abigail Milne
Lucy
Page 1 of 1 (2 items) [1]
Page size: 10
Send Email Invites *note that invitations can only be sent to attendees with valid email addresses
Date 24 Jul 2019 from 13:00 to 14:00
Reminder Email SMS 30 minutes before scheduled start
4
3
Save

CRM.001.003