CRM CUSTOMERS

ACTIVITIES

In CRM, an activity is any type of interaction that involves your customer:

- A **Call**
- An **Email**
- A **Meeting**
- An **On-Site Inspection**

A full list of all customers activities can be accessed from the **Dashboard** (Home Page).

A Client specific list of activities can be accessed from the *Customer Dashboard* (Customer Home page), as set out below

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

ACCESS CLIENT SPECIFIC LIST OF ACTIVITIES

1. In the *Dashboard* (Home page),
2. Click on the *Customers* tile.

1. The *Customers* listing page will open.
2. Click on the *customer icon* in the *View* column.

1. The selected *Customer Dashboard* (Customer Home page) will open.
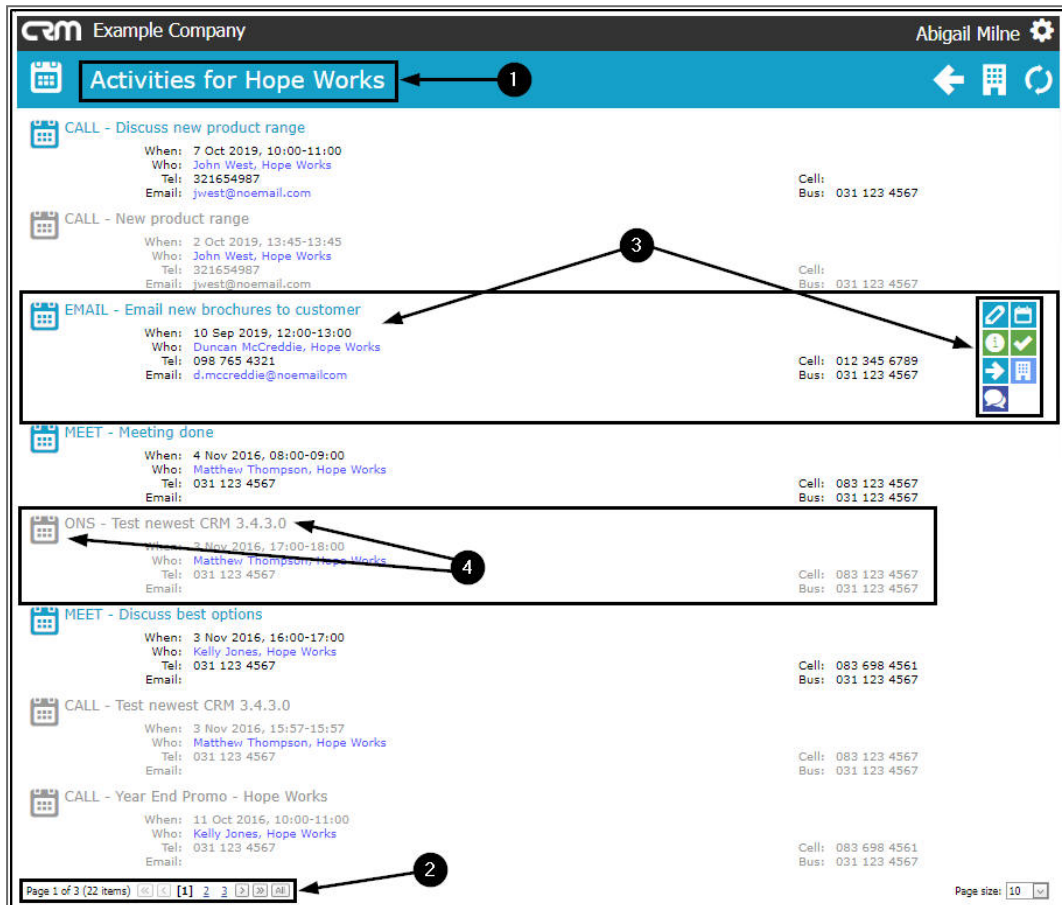2. Click on the *Activities* tile.

1. The **Activities for** [*Customer Name*] page will open listing <u>all</u> the activities linked to this customer.
2. The Page Reference field notes how many activities there are and on how many pages.

VIEW ACTIVITY ACTION BUTTONS

3. *Hover over* any activity to display the activity *Action buttons*:
   - View / Edit this Activity
   - Reschedule this Activity
   - View Case Info and History

- **Close this Case**
- **Next Action** (close current activity and create new activity)
- **View Customer**
- **New Quote**

4. Any *greyed out* activities are linked to a <u>different salesman</u> - Action buttons will <u>not</u> be available and you <u>cannot</u> edit these activities.

VIEW SUMMARY OF ACTIVITY INFORMATION

1. *Single click* on an activity, to access a quick view *summary* of the activity information.

2. If the selected activity is linked to yourself then this single click will also keep the *Action buttons*consistently displayed in the selected activity frame.