

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.

The screenshot shows a CRM dashboard for 'Example Company' with the user 'Abigail Milne'. The dashboard includes a search bar, a 'Dashboard' tab, and several key performance indicators (KPIs) and activity tiles.

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Phone call	20	2	2
Email	30	0	0
Meeting	20	0	0
On Site inspection	20	0	0
Site inspection	2	0	0

1 Month Performance

Bar chart showing performance for Cases, Invoices, Orders, and Quotes. The Y-axis ranges from 0.00 to 60,000.00.

4 Month Pipeline

Bar chart showing the pipeline for Oct 2019, Nov 2019, Dec 2019, and Jan 2020. The Y-axis ranges from 0.00 to 60,000.00.

Activity Tiles:

- create cold call: 15 Oct 2019, 19
- recommendations: 14
- warnings: 14
- customers: 75
- cases: 13
- activities: 13
- quotes: 8
- equipment: 147
- 3rd party: 8

The dashboard also features a 'Schedule Date' and 'Status' section with a 'No data to display' message.

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

CRM Example Company Abigail Milne ⚙️

Customers ← 1

Type Customer name search filter here... 🔍

View	Customer	Code	Contact	Contact phone	Contact email	Complet	Status	Rank	Active	Call Contact
🔍	Hope Works	HOP001	Duncan McCreddie	098 765 432	d.mccreddie@noem	91%	Active	Platinum	Yes	Yes
?	IT Supplies	ITS0001				8%	Active		No	No
?	Joes Carpentry Shop	JOE0001	Mary Watson	031 123 456		50%	New - CRM	Gold	No	Yes
?	Judes Jewels	JUD0001				8%	New - CRM	Silver	No	No
?	Just In Time	JUS001				16%	Active		Yes	No
?	King Copiers	KIN0001	Jason King	0210134506		58%	Released	Bronze	No	Yes
?	King Enterprises	KIN0002	Lucy Rowe			50%	Active	Silver	No	Yes
?	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	Active	Silver	No	Yes
?	Little Bee Honey	LIT0001	John Ginseng	031 123 456		66%	Active	Silver	No	Yes
?	Lovely Test Customer	LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes

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

The screenshot displays the CRM interface for 'Example Company' with user 'Abigail Milne'. The main header shows 'Hope Works' with a search bar. Below the header, there are three main sections:

- Activities for Last 30 Days:** A table with columns: Description, Target, Existing Custmrs, and New Custmrs.

Description	Target	Existing Custmrs	New Custmrs
Phone call	20	2	2
Email	30	0	0
Meeting	20	0	0
On Site inspection	20	0	0
Site inspection	2	0	0
- 1 Month Performance:** A bar chart showing performance for Cases, Invoices, Orders, and Quotes. The Y-axis ranges from 0.00 to 60,000.00.
- 4 Month Pipeline:** A bar chart showing the pipeline for Oct 2019, Nov 2019, Dec 2019, and Jan 2020. The Y-axis ranges from 0.00 to 60,000.00.

The central area features a navigation menu with icons for: create cold call, recommendations, warnings, customers, cases, activities (highlighted with a '2'), quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files. To the right of the menu is a 'Company Logo' and a 'Company Load' button. Below this is a '12 Months Sales History' bar chart showing Contract Income (yellow) and Sales Revenue (blue) from January 2018 to January 2019. The Y-axis ranges from -600 to 1800.

At the bottom, there is a footer with '©2019 CO3 Technologies (Pty) Ltd (3.5.6.0 / 3.5.6.0)' and the CO3 TECHNOLOGIES logo.

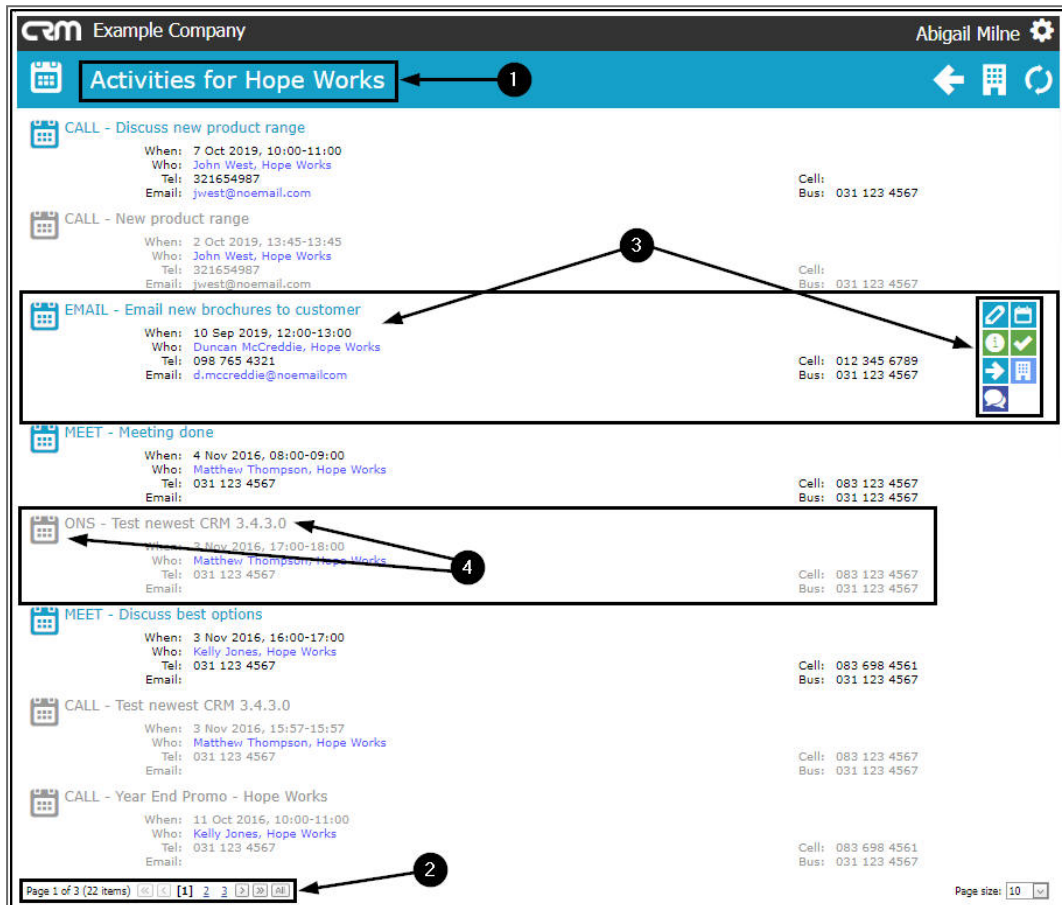
1. The **Activities for [Customer Name]** page will open listing all the activities linked to this customer.
2. The **Page Reference field** notes how many activities there are and on how many pages.

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 different salesman - Action buttons will not be available and you cannot 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.

CRM Example Company Abigail Milne

Activities for Hope Works

- CALL - Discuss new product range**
When: 10 Oct 2019, 12:00-13:00
Who: Michael Jackson, Hope Works
Tel: 098 765 4321
Email: m.jackson@noemail.com
Cell: 023 456 7890
Bus: 031 123 4567
- CALL - New product range**
When: 7 Oct 2019, 10:00-11:00
Who: John West, Hope Works
Tel: 321654987
Email: jwest@noemail.com
Cell:
Bus: 031 123 4567
- CALL - New product range**
When: 2 Oct 2019, 13:45-13:45
Who: John West, Hope Works
Tel: 321654987
Email: jwest@noemail.com
Cell:
Bus: 031 123 4567
- EMAIL - Email new brochures to customer**
When: 10 Sep 2019, 12:00-13:00
Who: Duncan McCreddie, Hope Works
Tel: 098 765 4321
Email: d.mccreddie@noemail.com
Where: Plot 91 Leaf Road, Forest Hills, New Town, Durban South, South Africa
Case: Email new brochures
Comments:
Completion Notes:
Cell: 012 345 6789
Bus: 031 123 4567
- MEET - Meeting done**
When: 4 Nov 2016, 08:00-09:00
Who: Matthew Thompson, Hope Works
Tel: 031 123 4567
Cell: 083 123 4567
Bus: 031 123 4567
- ONS - Test newest CRM 3.4.3.0**
When: 3 Nov 2016, 17:00-18:00
Who: Matthew Thompson, Hope Works
Tel: 031 123 4567
Cell: 083 123 4567
Bus: 031 123 4567
- MEET - Discuss best options**
When: 3 Nov 2016, 16:00-17:00
Who: Kelly Jones, Hope Works
Tel: 031 123 4567
Cell: 083 698 4561
Bus: 031 123 4567
- CALL - Test newest CRM 3.4.3.0**
When: 3 Nov 2016, 15:57-15:57
Who: Matthew Thompson, Hope Works
Tel: 031 123 4567
Cell: 083 123 4567
Bus: 031 123 4567