

CRM CUSTOMERS

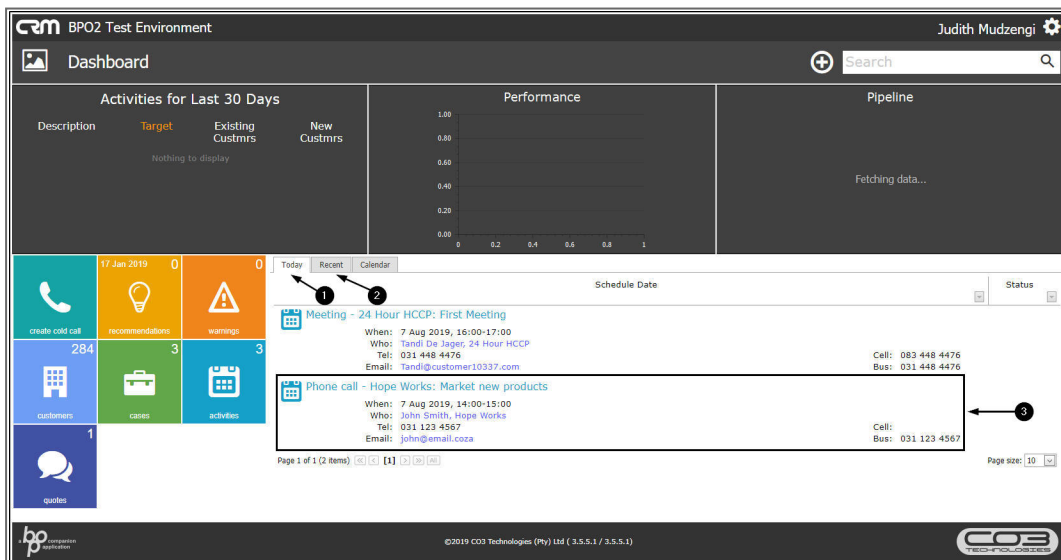
OPEN ACTIVITIES

Open Activities will list all open activities for the selected customer, and can be actioned directly from here.

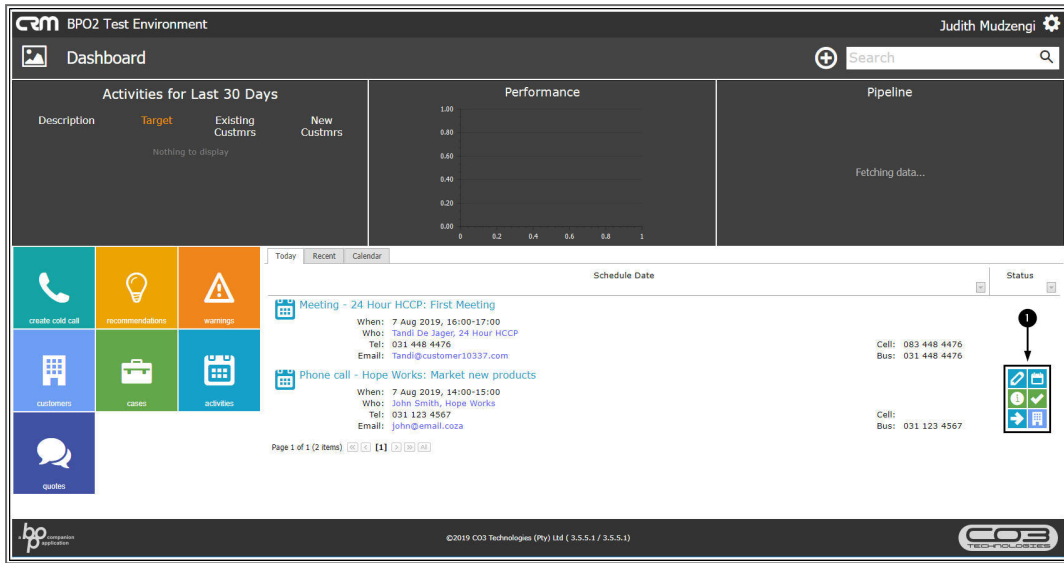
Ribbon Access: Webpage > `http://[servername]:[port-no]/BPOCRM/User.aspx`

OPEN ACTIVITIES

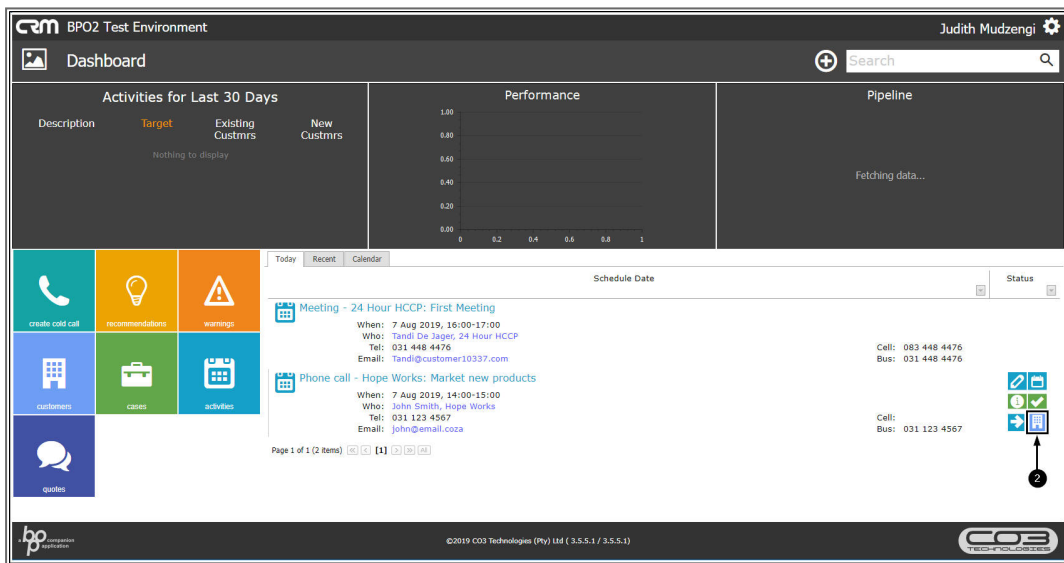
1. The **Today** tab will be selected by default displaying customer activities due on that day.
2. If you cannot find the information you are looking for within this tab, click on the **Recent** tab.
3. Hover over an activity linked to the customer you wish to view open activities for.



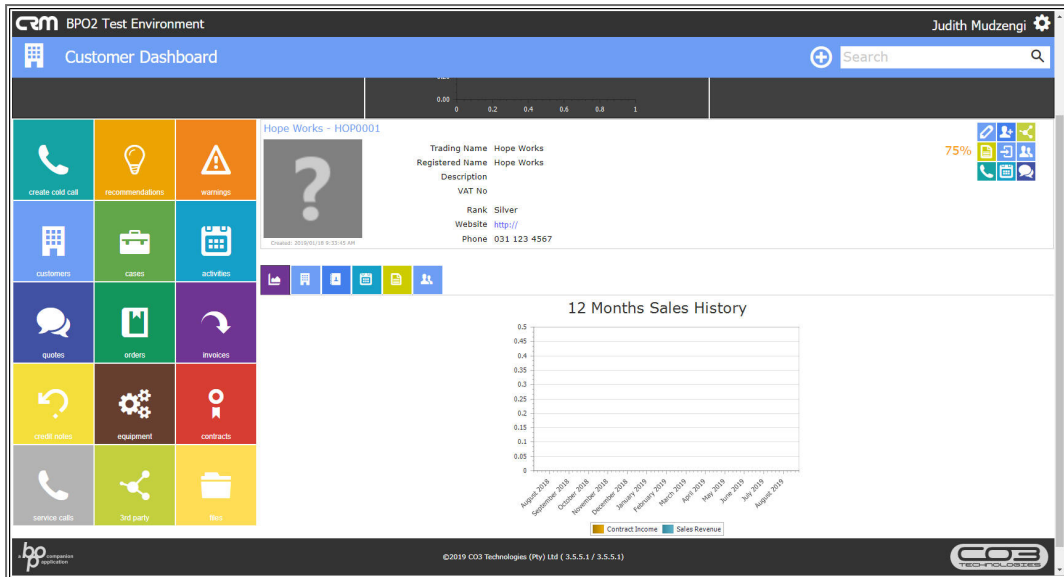
1. **Action icons** will be displayed to the right of the customer activity you are hovering over.



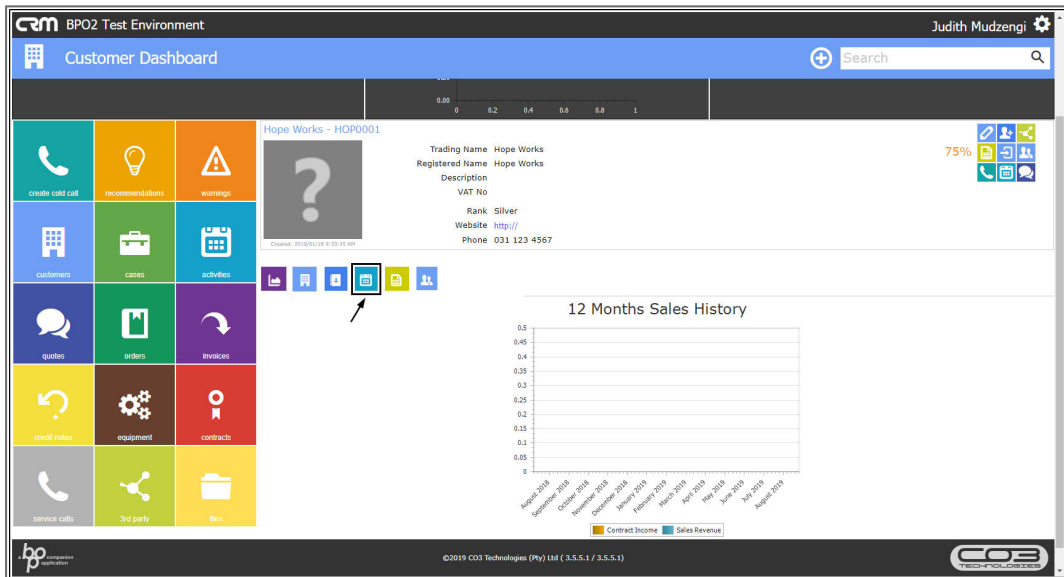
2. Click on the **View Customer** icon.



- The **Customer Dashboard** will be displayed.



- Click on the **Open Activities** icon.



- All open activities for the selected customer will be displayed.

CRM BPO2 Test Environment Judith Mudzengi

Customer Dashboard Search

Hope Works - HOP0001 75%

Trading Name Hope Works
 Registered Name Hope Works
 Description
 VAT No
 Rank Silver
 Website <http://>
 Phone 031 123 4567

Created: 2019/01/18 9:33:05 AM

Schedule Date	Status
Meeting - First Meeting When: 9 Aug 2019, 09:00-10:00 Who: John Smith Tel: 031 123 4567 Email: john@email.co.za Cell: 031 123 4567	
Phone call - Market new products When: 7 Aug 2019, 14:00-15:00 Who: John Smith Tel: 031 123 4567 Email: john@email.co.za Cell: 031 123 4567	
Meeting - Requirements meeting When: 18 Jan 2019, 13:40-14:40 Who: John Smith Tel: 031 123 4567 Email: john@email.co.za Cell: 031 123 4567	

Page 1 of 1 (3 items) Page size: 10

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SORTING DATA

- Click on the **Schedule Data** column header.

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Customer Dashboard Search

Hope Works - HOP0001 75%

Trading Name Hope Works
 Registered Name Hope Works
 Description
 VAT No
 Rank Silver
 Website <http://>
 Phone 031 123 4567

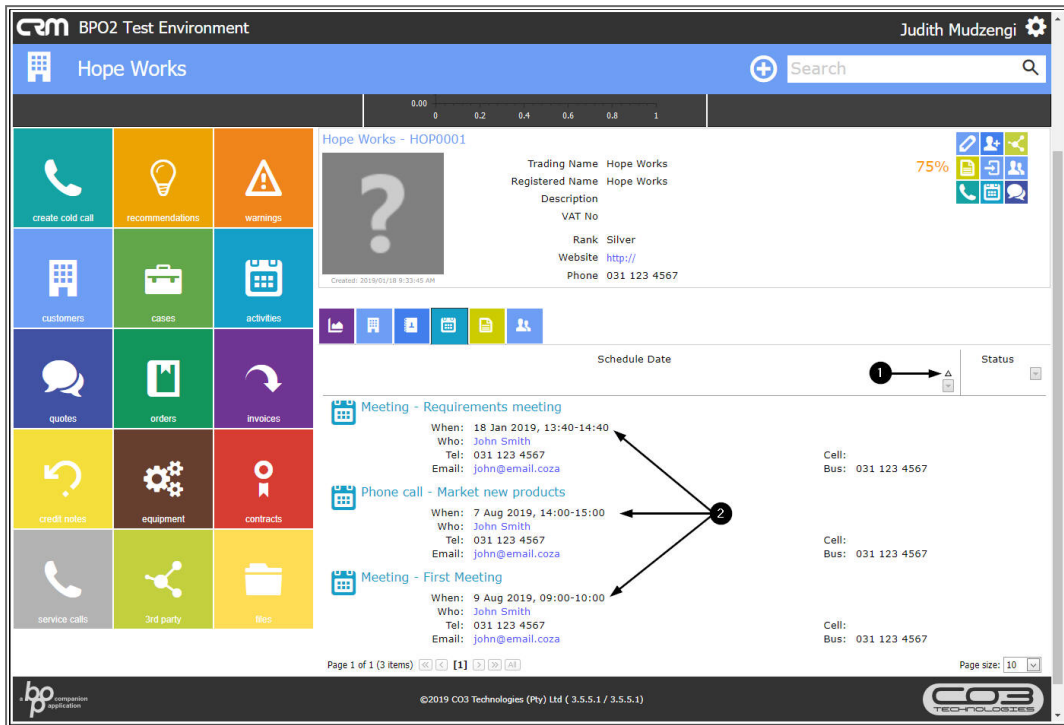
Created: 2019/01/18 9:33:05 AM

Schedule Date	Status
Meeting - First Meeting When: 9 Aug 2019, 09:00-10:00 Who: John Smith Tel: 031 123 4567 Email: john@email.co.za Cell: 031 123 4567	
Phone call - Market new products When: 7 Aug 2019, 14:00-15:00 Who: John Smith Tel: 031 123 4567 Email: john@email.co.za Cell: 031 123 4567	
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Page 1 of 1 (3 items) Page size: 10

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1. A **Sort** button will be revealed, pointing upwards and
2. all open activities will be sorted in **ascending** order - **earliest** date first.



- To sort in descending order, click on the **Schedule Date** column header.

The screenshot shows a CRM interface for a customer named 'Hope Works'. The top navigation bar includes 'Hope Works' and a search field. A sidebar on the left contains various activity icons such as 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The main content area displays the customer's details, including 'Trading Name: Hope Works', 'Registered Name: Hope Works', 'Rank: Silver', 'Website: http://', and 'Phone: 031 123 4567'. Below this, a table of activities is shown, sorted by 'Schedule Date' in descending order. The activities listed are:

Activity Name	When	Who	Tel	Email	Cell	Bus
Meeting - Requirements meeting	18 Jan 2019, 13:40-14:40	John Smith	031 123 4567	john@email.coza		031 123 4567
Phone call - Market new products	7 Aug 2019, 14:00-15:00	John Smith	031 123 4567	john@email.coza		031 123 4567
Meeting - First Meeting	9 Aug 2019, 09:00-10:00	John Smith	031 123 4567	john@email.coza		031 123 4567

The 'Sort' button in the table header is pointing downwards, indicating a descending sort order. The footer of the interface shows '©2019 CO3 Technologies (Pty) Ltd (3.5.5.1 / 3.5.5.1)' and the CO3 TECHNOLOGIES logo.

1. The **Sort** button will now be pointing downwards and
2. all open activities will be sorted in **descending** order - **latest** date first.

The screenshot shows the CRM interface for a customer named 'Hope Works'. The top navigation bar includes 'CRM BPO2 Test Environment', 'Judith Mudzengi', and a search bar. The main content area is divided into a left-hand menu with various activity icons (e.g., create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, files) and a central panel displaying customer details and a list of activities.

Customer Details for 'Hope Works - HOP0001':

- Trading Name: Hope Works
- Registered Name: Hope Works
- Description: [Blank]
- VAT No: [Blank]
- Rank: Silver
- Website: http://
- Phone: 031 123 4567

Activities List:

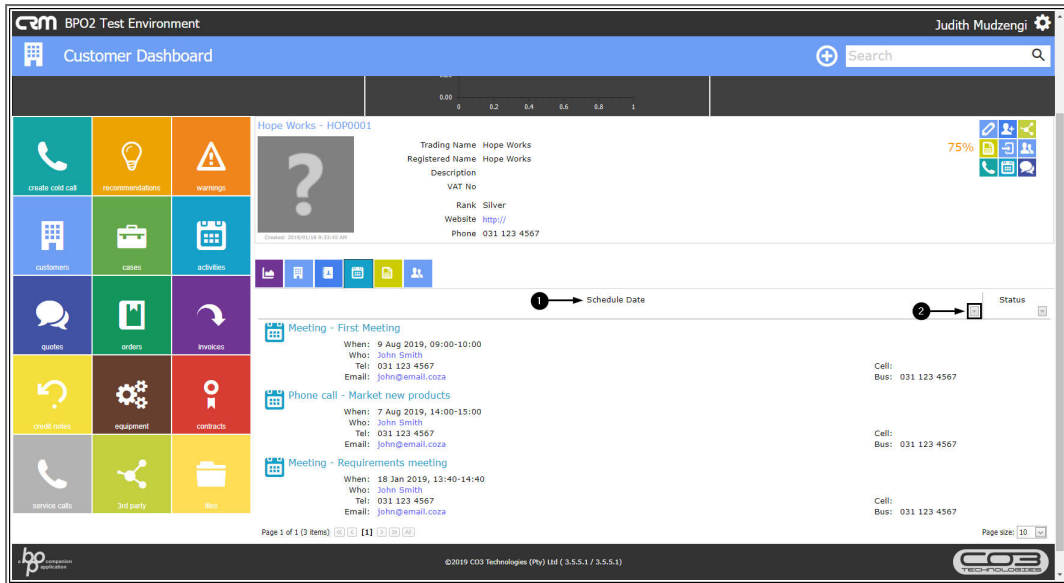
Activity Name	When	Who	Tel	Email	Cell	Bus
Meeting - First Meeting	9 Aug 2019, 09:00-10:00	John Smith	031 123 4567	john@email.co.za	031 123 4567	031 123 4567
Phone call - Market new products	7 Aug 2019, 14:00-15:00	John Smith	031 123 4567	john@email.co.za	031 123 4567	031 123 4567
Meeting - Requirements meeting	18 Jan 2019, 13:40-14:40	John Smith	031 123 4567	john@email.co.za	031 123 4567	031 123 4567

The 'Schedule Date' filter is set to '1', and a 'down arrow' icon is highlighted with a circled '2'.

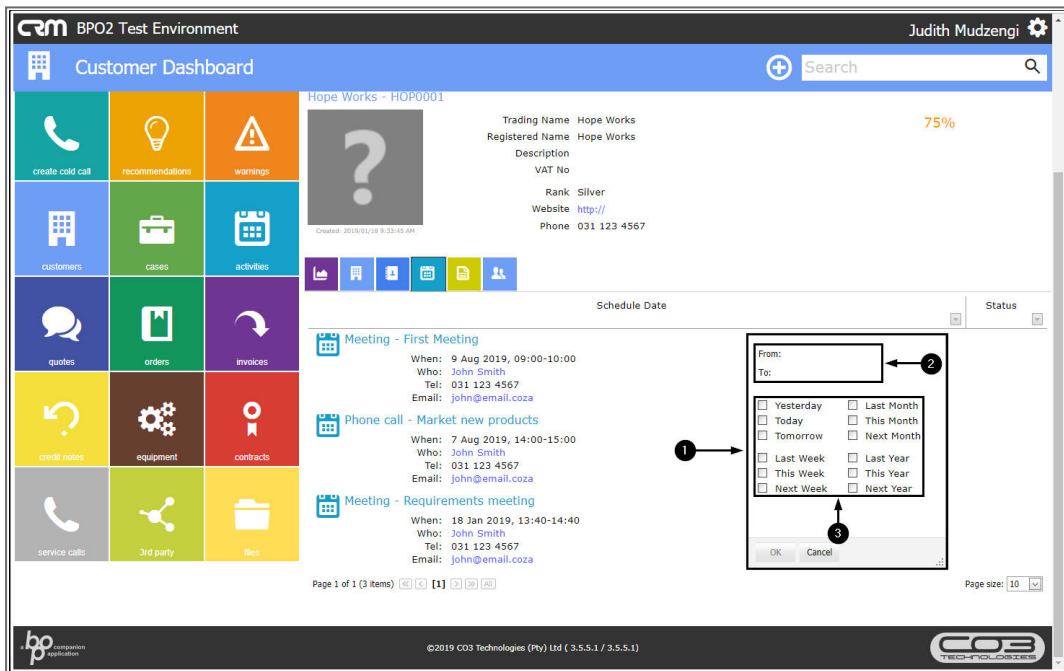
FILTER OPEN ACTIVITIES BY SCHEDULE DATE

You can filter the list of all open activities by schedule date.

1. On the **Schedule Date** section,
2. click on the **down arrow**.

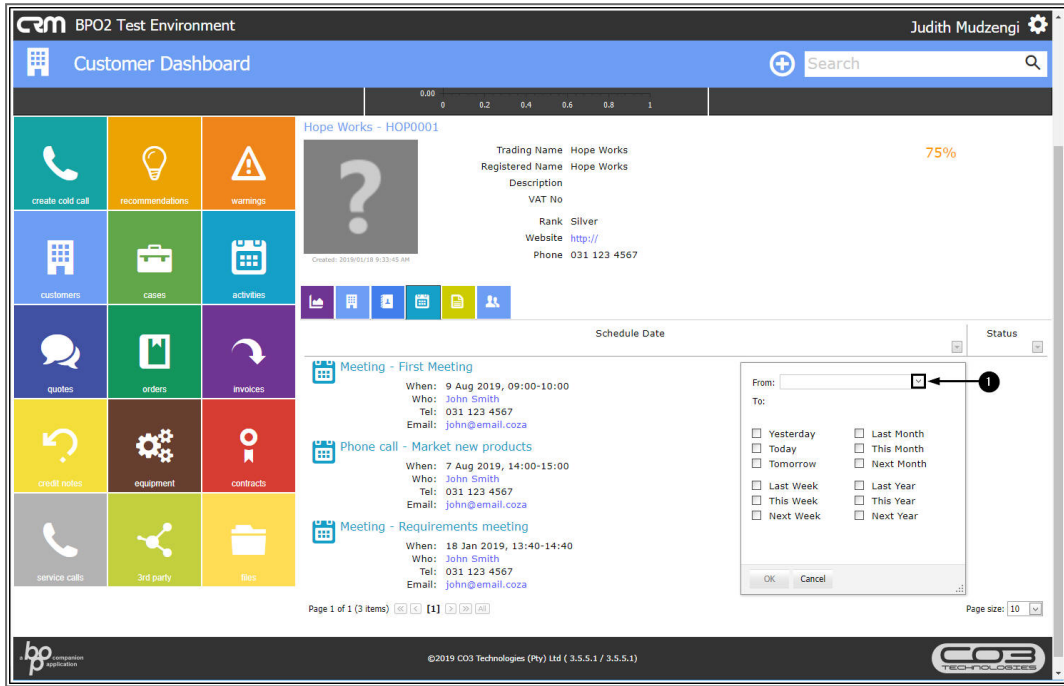


1. A *menu* will be displayed.
2. You can either filter by *Date Range* or
3. *Timeline*.

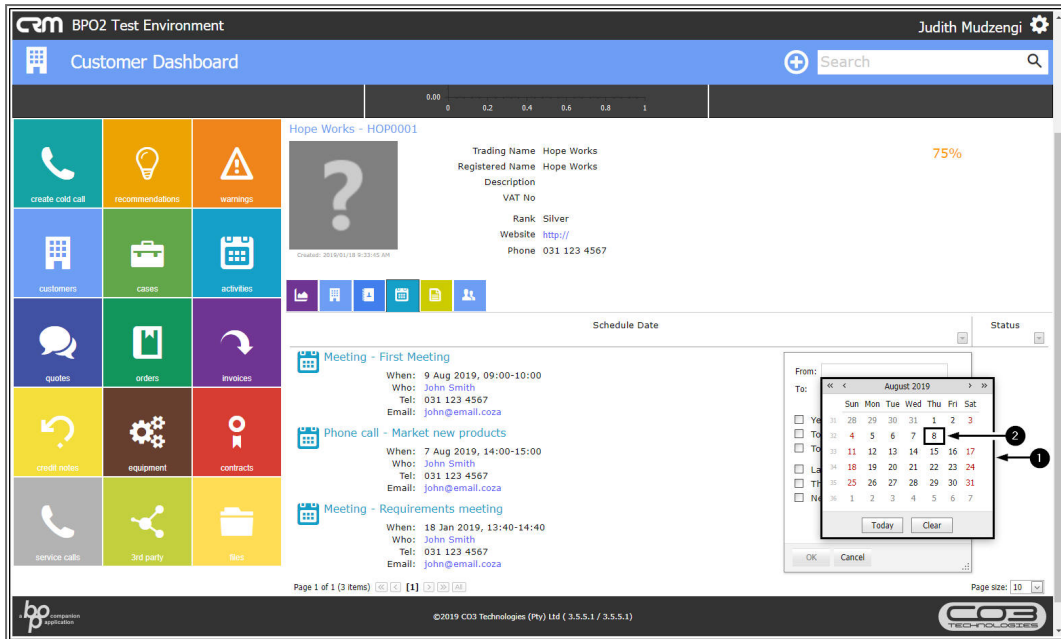


FILTER BY DATE RANGE

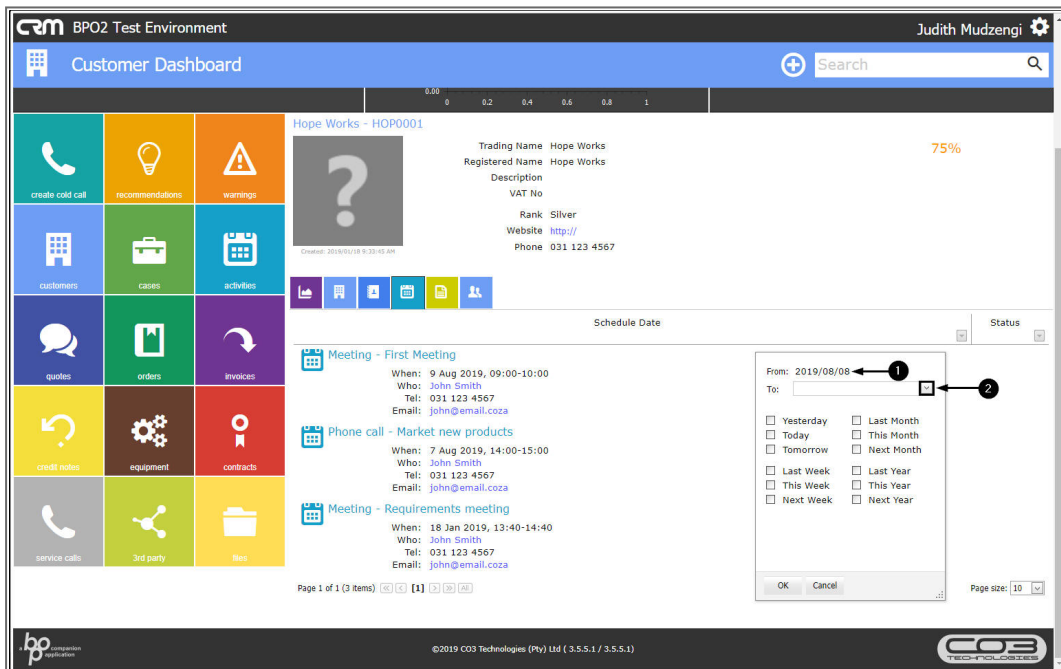
1. Hover over the **From** field, a **down arrow** will be displayed.
1. Click on the **down arrow**.



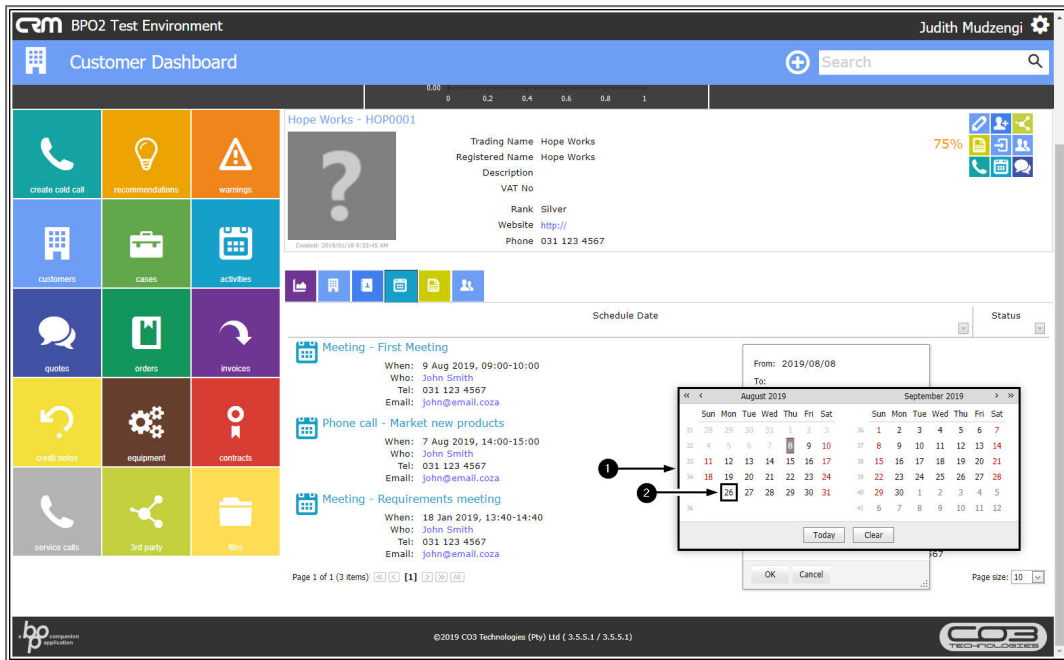
1. A **calender** will be displayed.
2. Select the relevant date.



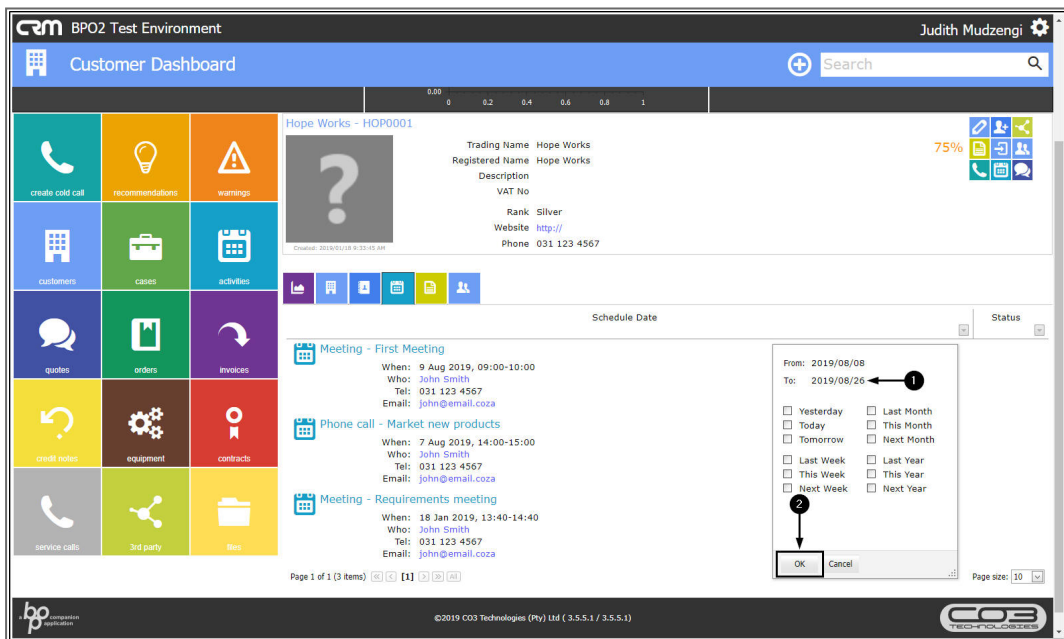
1. The **From** field will be populated with the selected date.
2. Hover over the **To** field, a **down arrow** will be displayed.
3. Click on the **down arrow**.



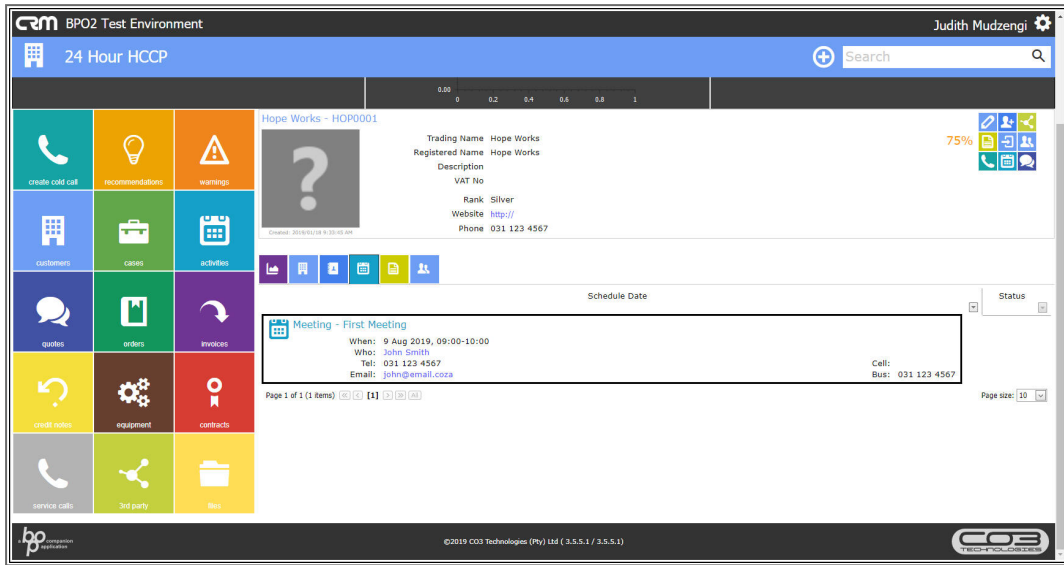
1. A *calender* will be displayed.
2. Select the relevant date.



1. The *To* field will be populated with the selected date.
2. Click on *Ok*.

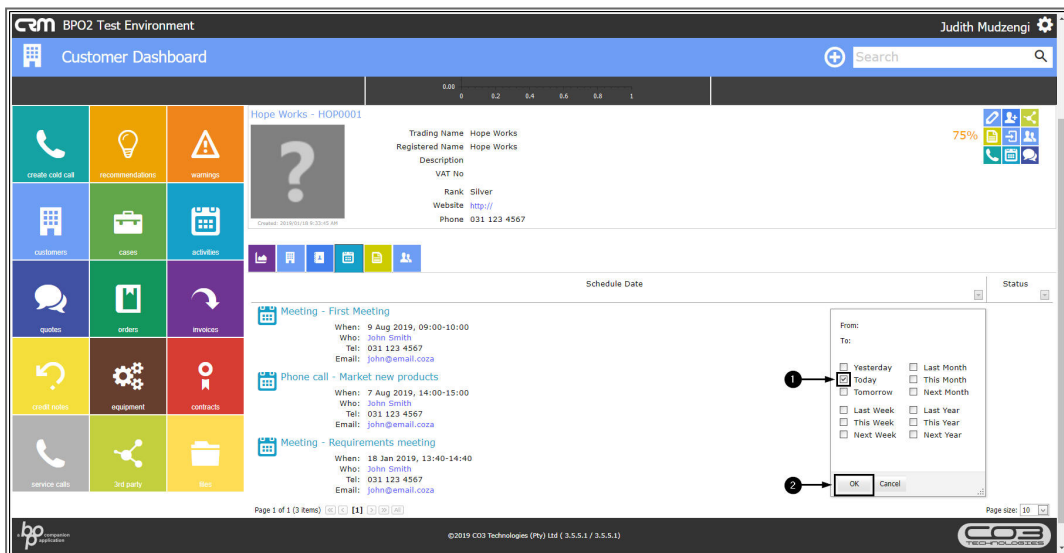


- Only open activities that fall within the selected date range will be displayed.

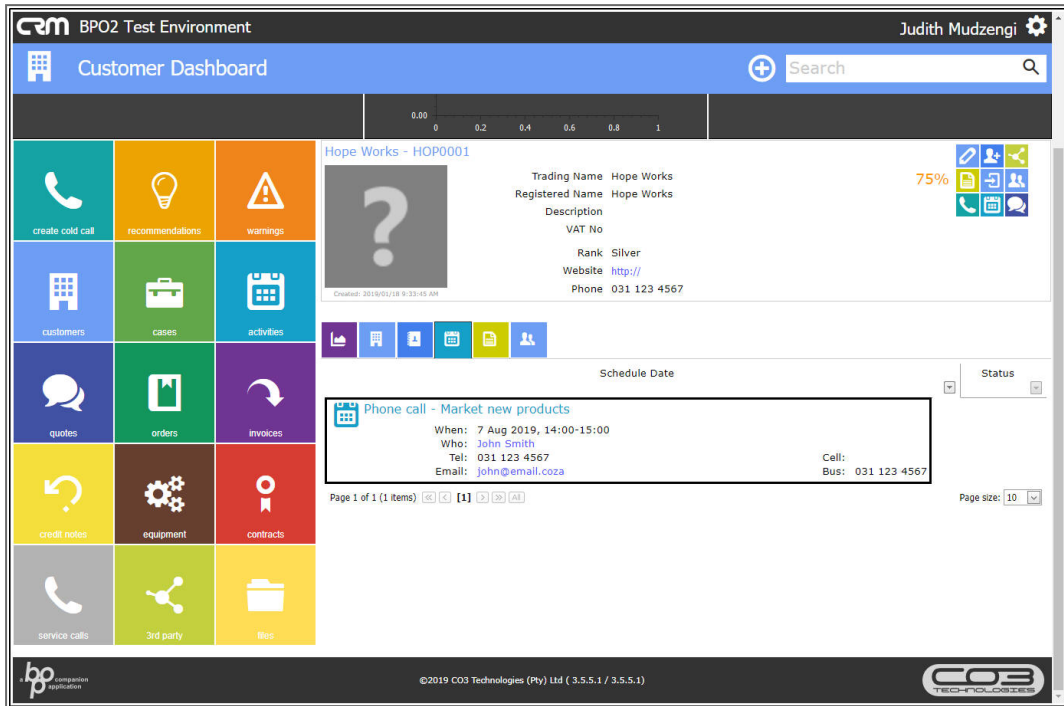


FILTER BY TIMELINE

1. Click on the **checkbox** of the relevant timeline.
2. Click on **Ok**.

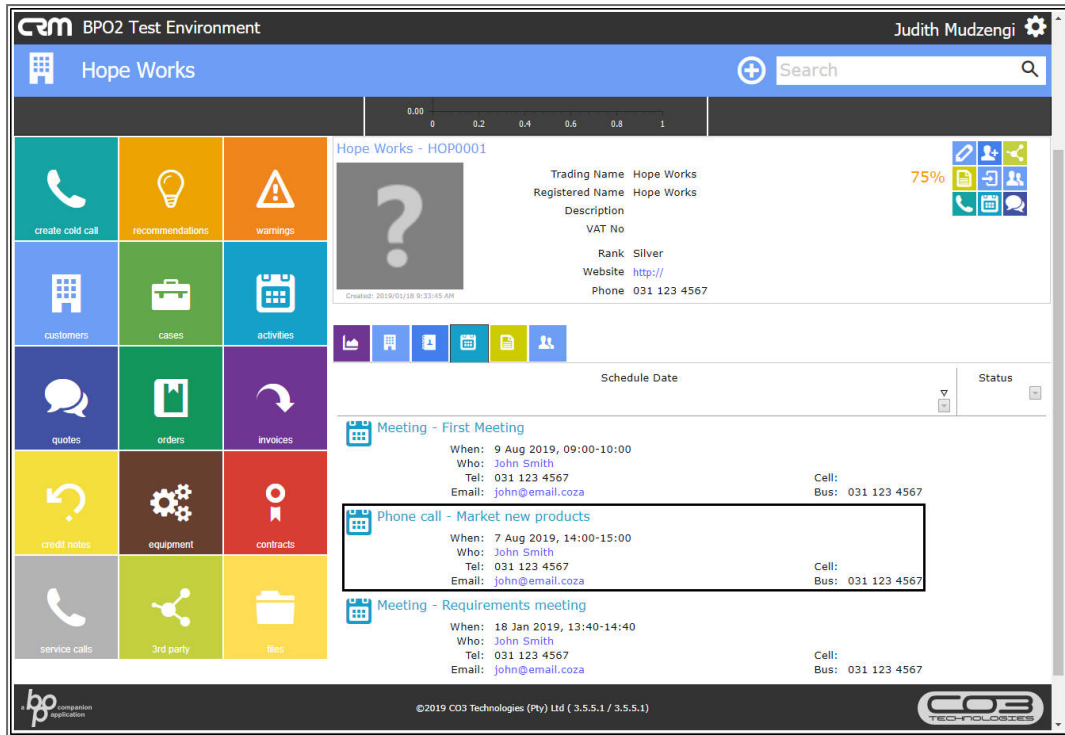


- Only open activities that fall within the selected timeline will be displayed.



ACTION ITEMS

- Hover over an open activity.



The screenshot displays a CRM interface for a customer named 'Hope Works'. The interface includes a navigation menu on the left with icons for 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The main area shows customer details such as 'Trading Name Hope Works', 'Registered Name Hope Works', 'Rank Silver', and 'Phone 031 123 4567'. Below this, there is a list of activities with details for each, including dates, times, and contact information for John Smith.

Activity Name	When	Who	Tel	Email	Cell	Bus
Meeting - First Meeting	9 Aug 2019, 09:00-10:00	John Smith	031 123 4567	john@email.coza	031 123 4567	031 123 4567
Phone call - Market new products	7 Aug 2019, 14:00-15:00	John Smith	031 123 4567	john@email.coza	031 123 4567	031 123 4567
Meeting - Requirements meeting	18 Jan 2019, 13:40-14:40	John Smith	031 123 4567	john@email.coza	031 123 4567	031 123 4567

- The following action items will be displayed:
 - Reschedule this Activity
 - View / Edit Activity
 - Close this Case
 - View Case Info and History
 - View Customer
 - Next Action (close current activity and create new activity)
 - Create new Quote

The screenshot displays the CO3 CRM interface for a customer named 'Hope Works'. The top navigation bar includes the user name 'Judith Mudzengi' and a search bar. A sidebar on the left contains a grid of activity cards: create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files. The main content area shows the customer's profile with a 75% completion indicator and contact details. Below the profile is a list of activities:

Activity	When	Who	Contact
Meeting - First Meeting	9 Aug 2019, 09:00-10:00	John Smith	031 123 4567
Phone call - Market new products	7 Aug 2019, 14:00-15:00	John Smith	031 123 4567
Meeting - Requirements meeting	18 Jan 2019, 13:40-14:40	John Smith	031 123 4567

VIEW MORE DETAILS OF AN OPEN ACTIVITY

- Click on an open activity you wish to view more details for.

CRM BPO2 Test Environment Judith Mudzengi

Hope Works Search

0.00 0 0.2 0.4 0.6 0.8 1

Hope Works - HOP0001 75%

Trading Name Hope Works
Registered Name Hope Works
Description
VAT No
Rank Silver
Website <http://>
Phone 031 123 4567

Created: 2019/01/28 9:33:45 AM

create cold call recommendations warnings
customers cases activities
quotes orders invoices
credit notes equipment contracts
service calls 3rd party files

Schedule Date Status

Meeting - First Meeting
When: 9 Aug 2019, 09:00-10:00
Who: John Smith
Tel: 031 123 4567
Email: john@email.co.za
Cell: 031 123 4567
Bus: 031 123 4567

Phone call - Market new products
When: 7 Aug 2019, 14:00-15:00
Who: John Smith
Tel: 031 123 4567
Email: john@email.co.za
Cell: 031 123 4567
Bus: 031 123 4567

Meeting - Requirements meeting
When: 18 Jan 2019, 13:40-14:40
Who: John Smith
Tel: 031 123 4567
Email: john@email.co.za
Cell: 031 123 4567
Bus: 031 123 4567

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- More details of the selected open activity will be displayed.

CRM BPO2 Test Environment Judith Mudzengi

Hope Works Search

0.00 0 0.2 0.4 0.6 0.8 1

Hope Works - HOP0001 75%

Trading Name Hope Works
Registered Name Hope Works
Description
VAT No
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Website <http://>
Phone 031 123 4567

Created: 2019/01/28 9:33:45 AM

create cold call recommendations warnings
customers cases activities
quotes orders invoices
credit notes equipment contracts
service calls 3rd party files

Schedule Date Status

Meeting - First Meeting
When: 9 Aug 2019, 09:00-10:00
Who: John Smith
Tel: 031 123 4567
Email: john@email.co.za
Cell: 031 123 4567
Bus: 031 123 4567

Phone call - Market new products
When: 7 Aug 2019, 14:00-15:00
Who: John Smith
Tel: 031 123 4567
Email: john@email.co.za
Where: 26 Lavender Road New Town Forest Hills Durban KZN
Case: Phone Call
Comments: Market new products
Completion Notes:
Cell: 031 123 4567
Bus: 031 123 4567

Meeting - Requirements meeting
When: 18 Jan 2019, 13:40-14:40
Who: John Smith
Tel: 031 123 4567
Email: john@email.co.za
Cell: 031 123 4567
Bus: 031 123 4567

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CRM.002.016