CRM CUSTOMERS

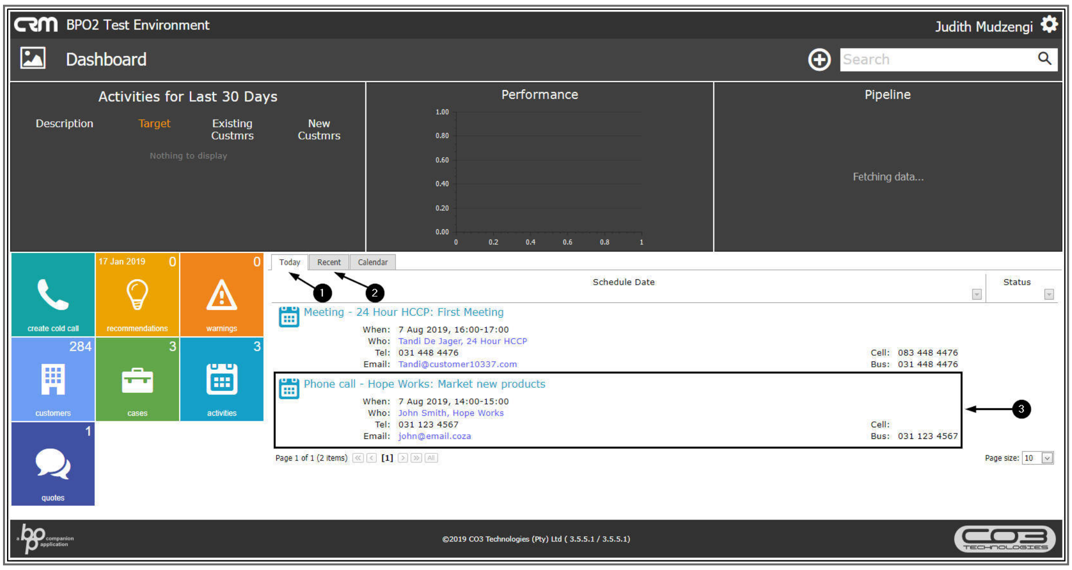
OPEN ACTIVITIES

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

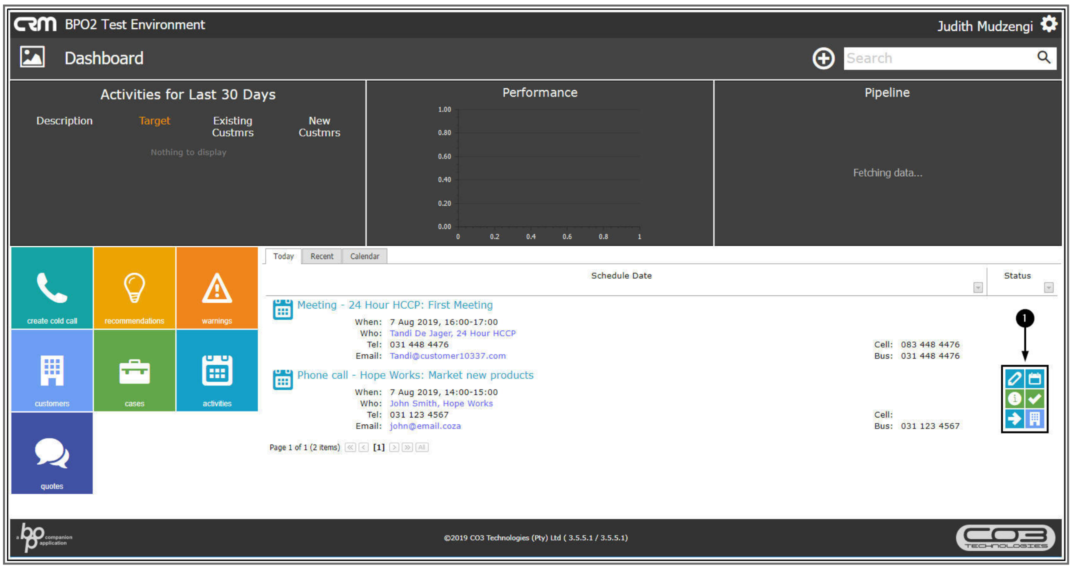
Ribbon Access: *Webpage > http://[servername]:[port-no]/BPOCRM/User.aspx*

OPEN ACTIVITIES

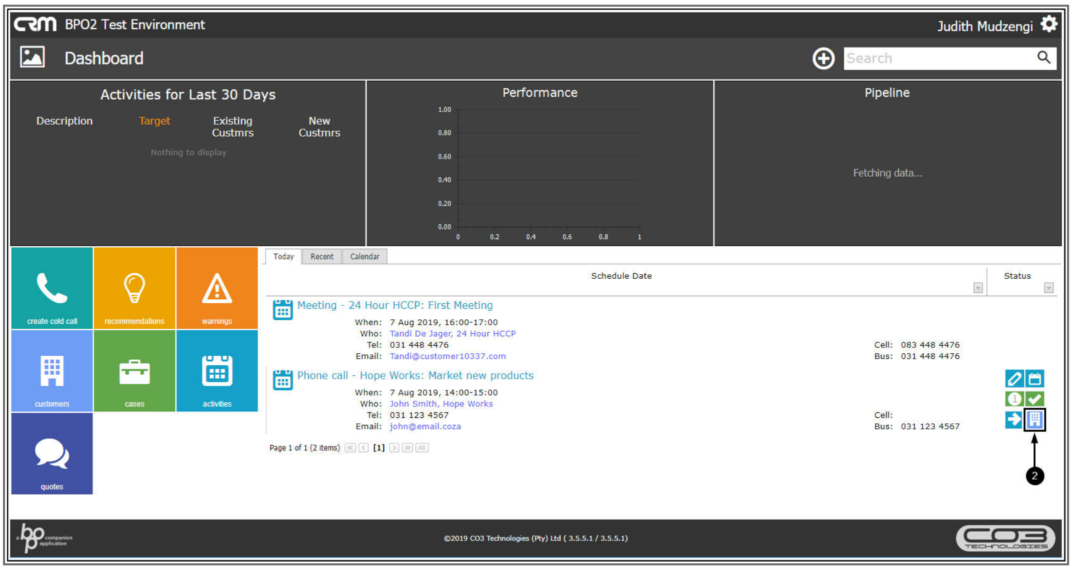
1. The ***Today*** tab will be selected by default displaying customer activities due on that day.
2. If you cannot find the information you are looking for within this tab, click on the ***Recent*** tab.
3. Hover over an activity linked to the customer you wish to view open activities for.



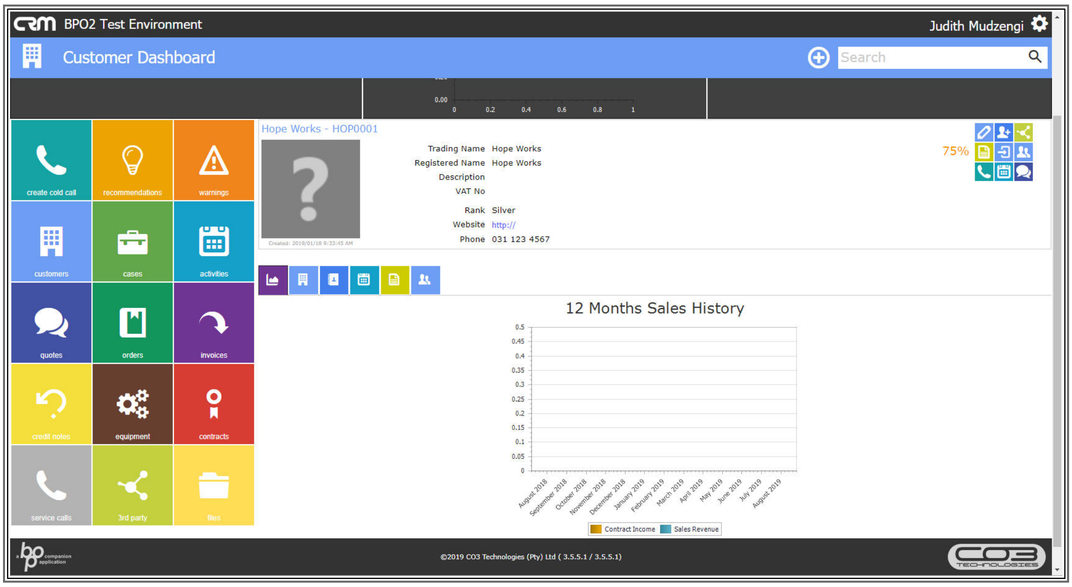
1. ***Action icons*** will be displayed to the right of the customer activity you are hovering over.



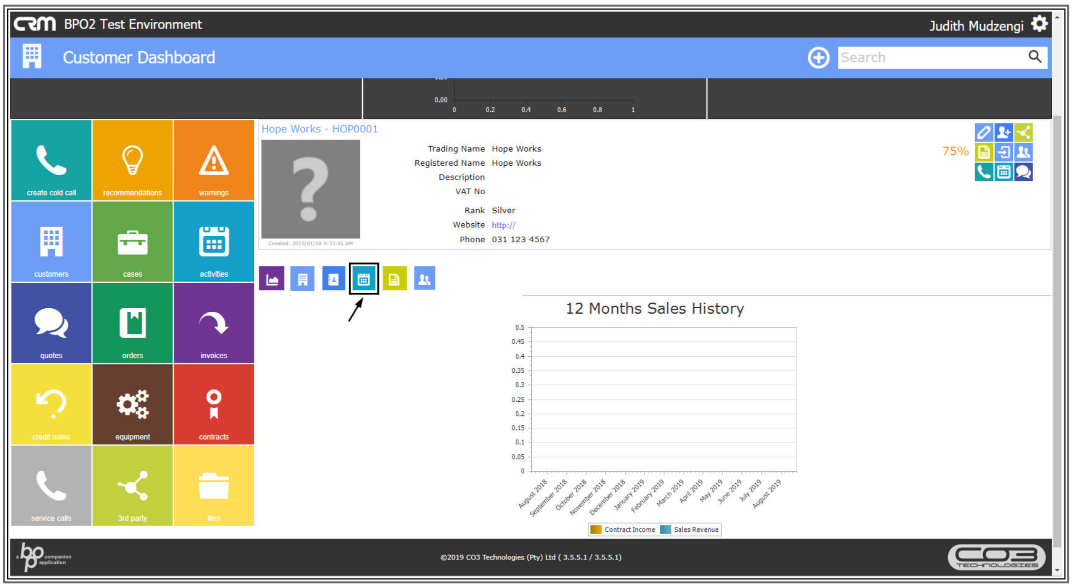
2. Click on the ***View Customer*** icon.



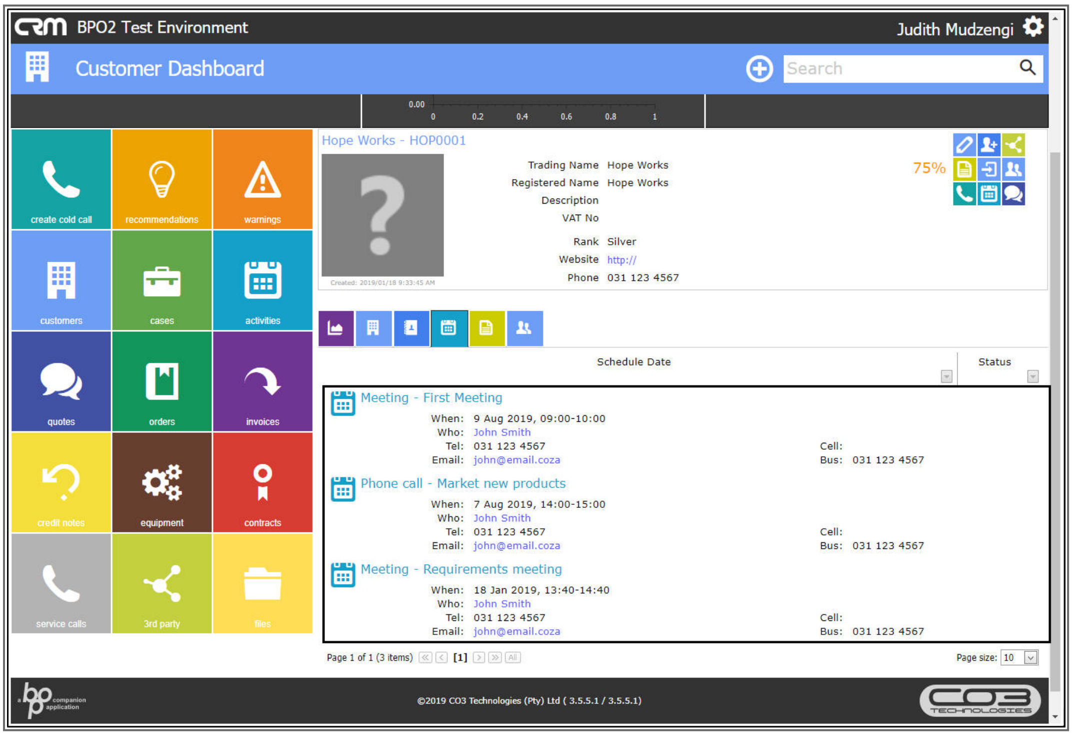
- The ***Customer Dashboard*** will be displayed.



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

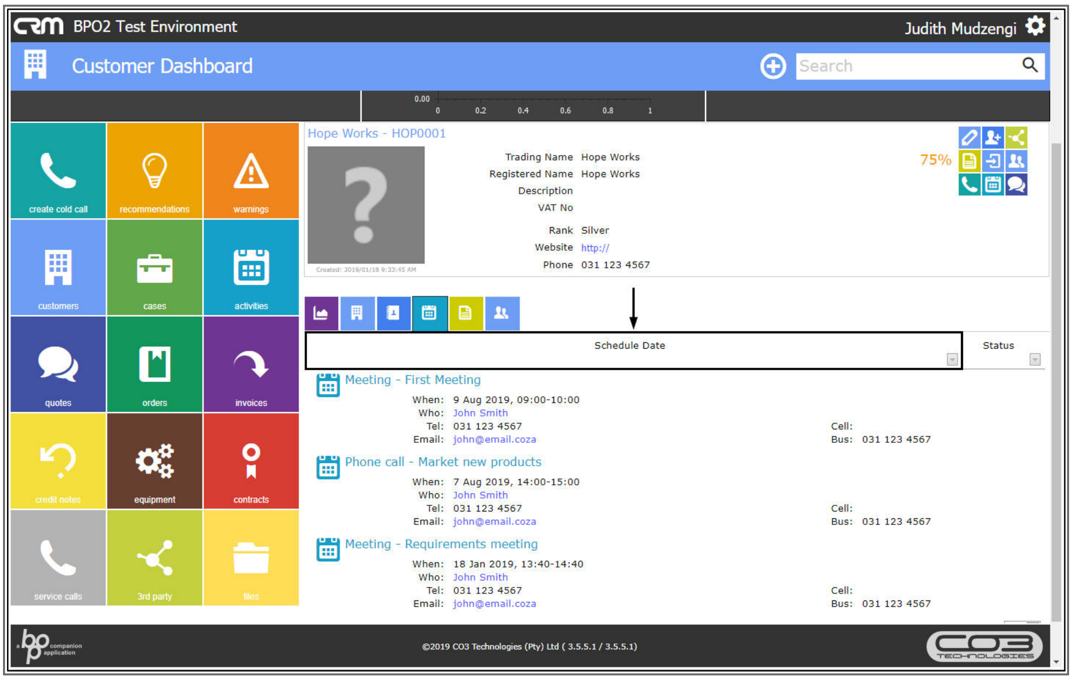


- All open activities for the selected customer will be displayed.

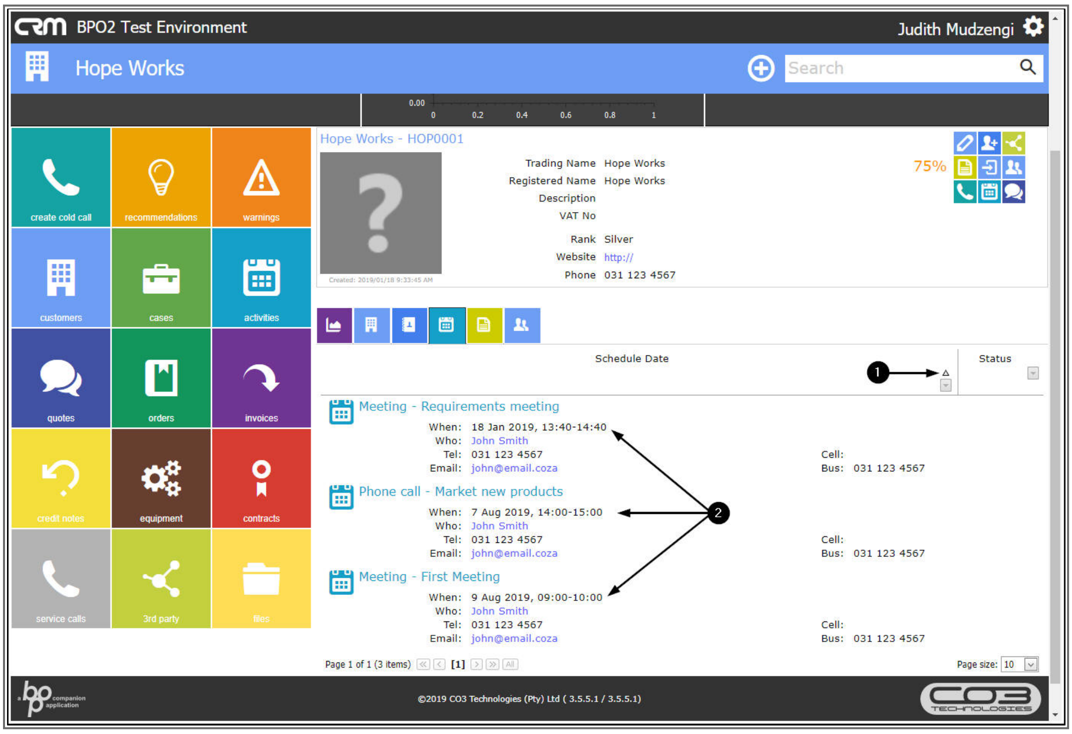


SORTING DATA

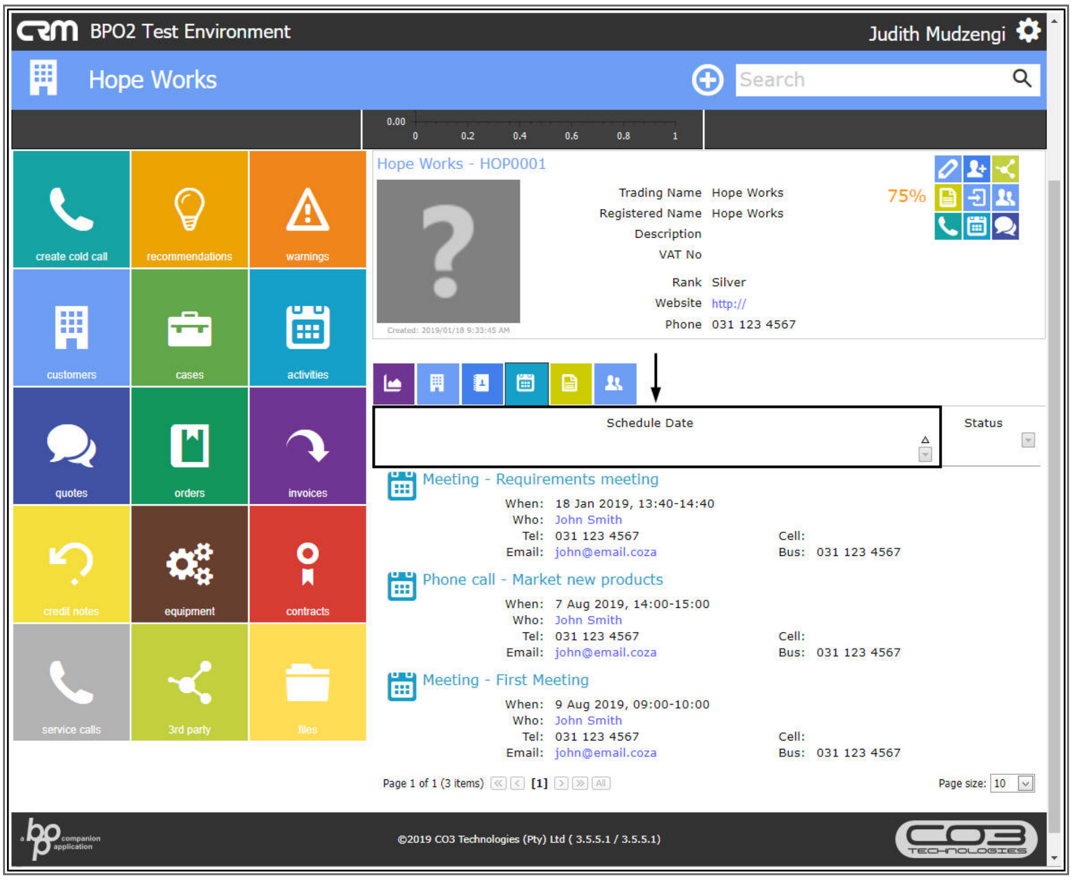
- Click on the ***Schedule Data*** column header.



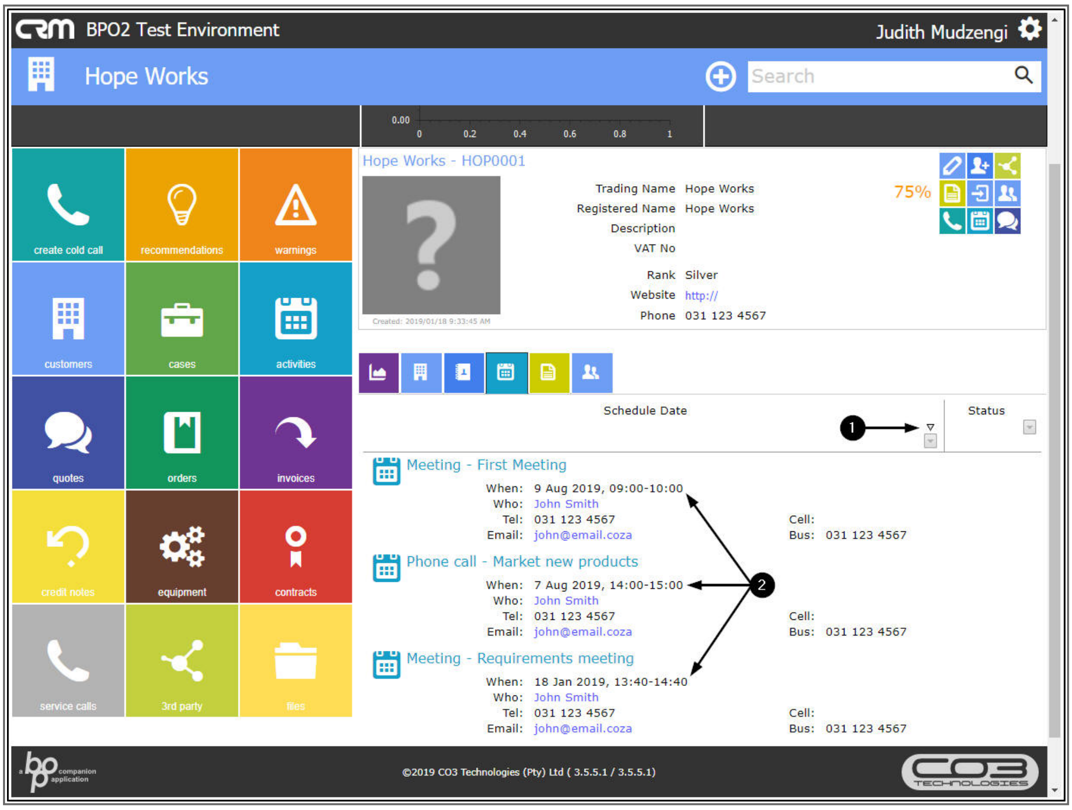
1. A ***Sort*** button will be revealed, pointing upwards and
2. all open activities will be sorted in ***ascending*** order - ***earliest*** date first.



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



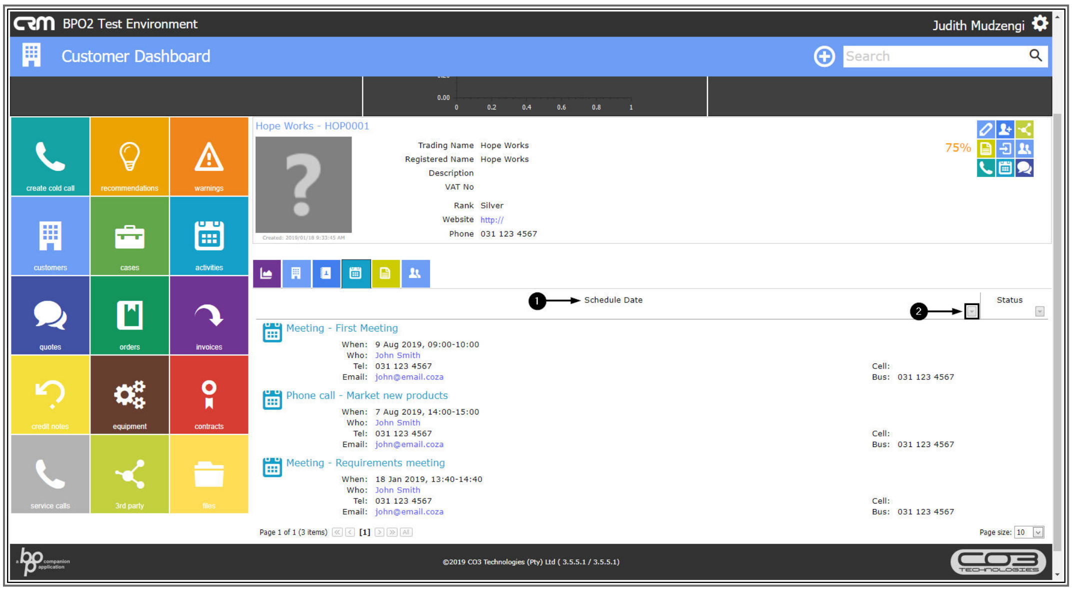
1. The ***Sort*** button will now be pointing downwards and
2. all open activities will be sorted in ***descending*** order - ***latest*** date first.



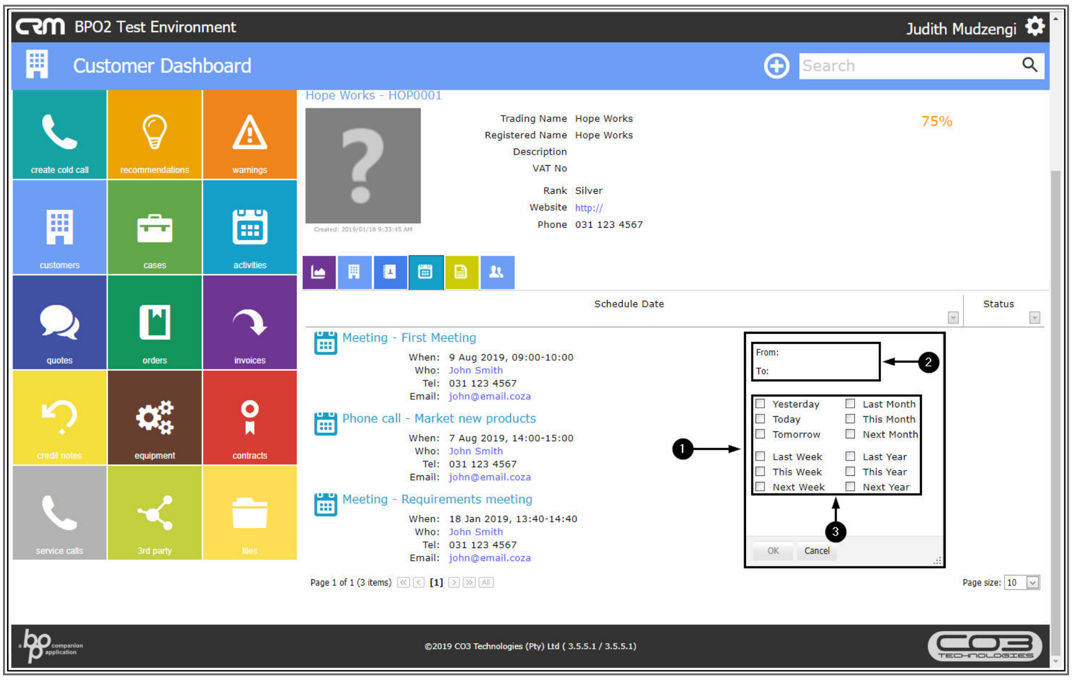
FILTER OPEN ACTIVITIES BY SCHEDULE DATE

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

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



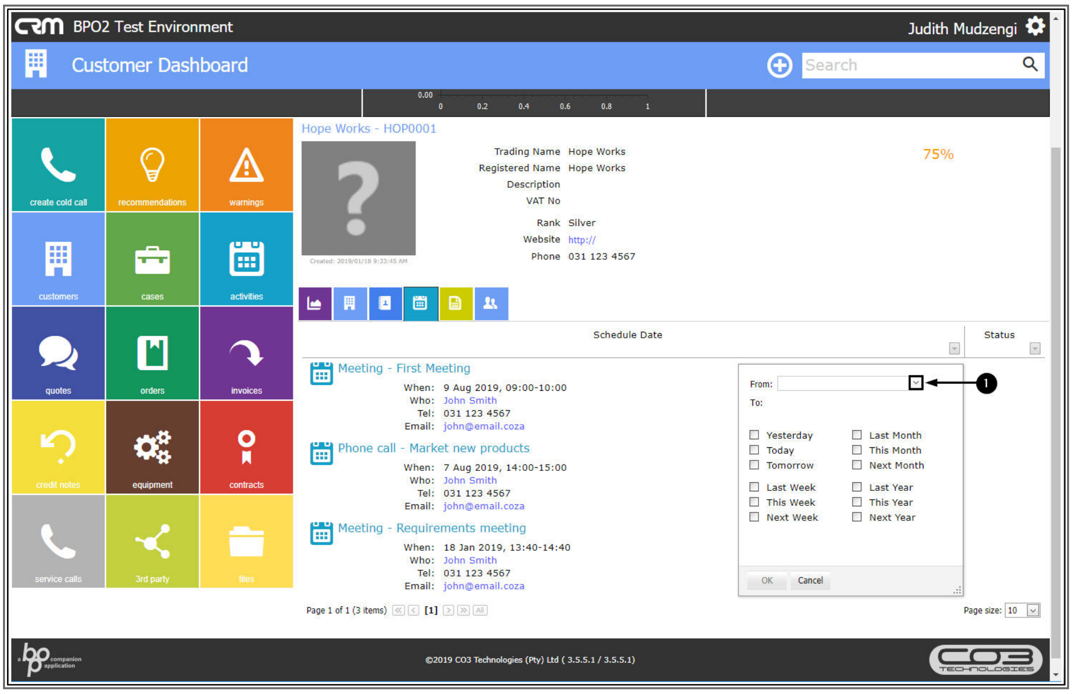
1. A ***menu*** will be displayed.
2. You can either filter by ***Date Range*** or
3. ***Timeline***.



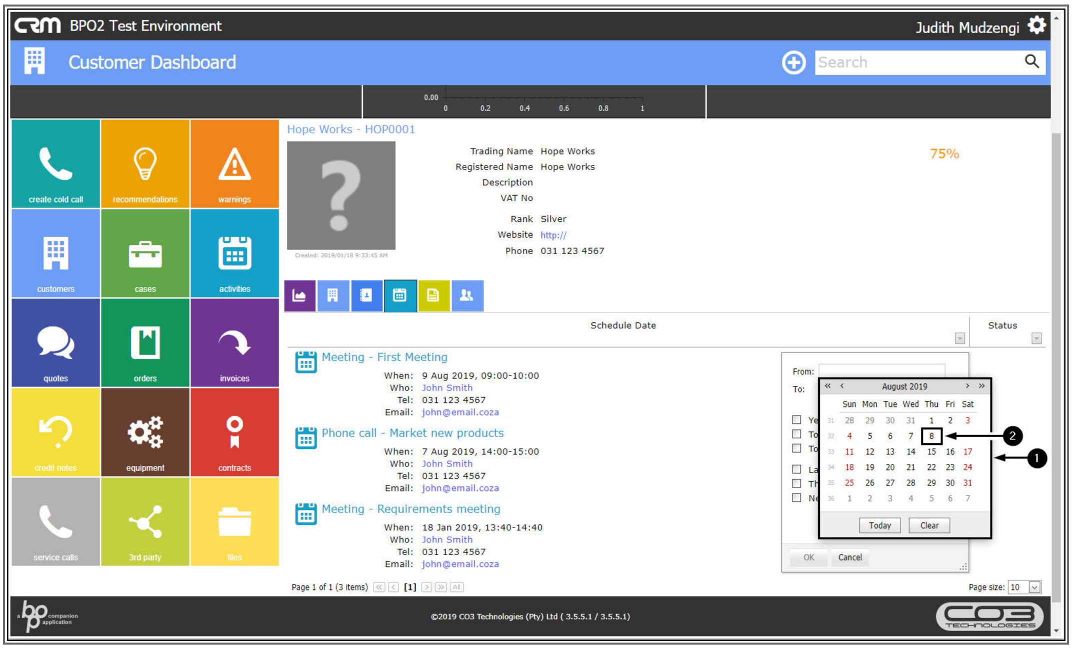
FILTER BY DATE RANGE

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

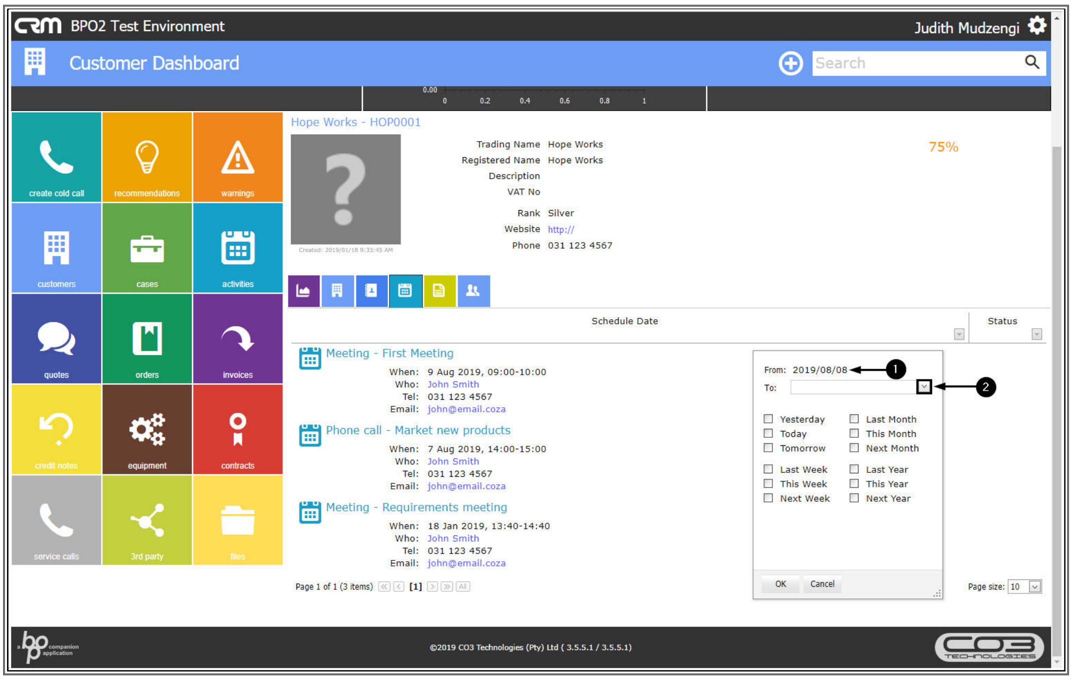
1. Click on the ***down arrow***.



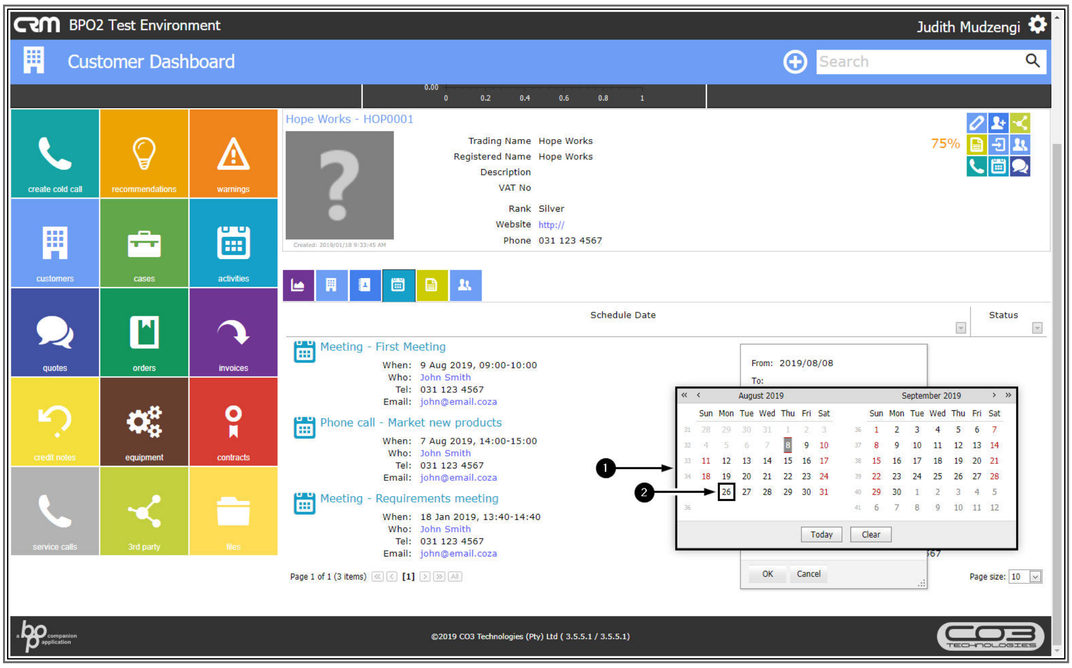
1. A ***calender*** will be displayed.
2. Select the relevant date.



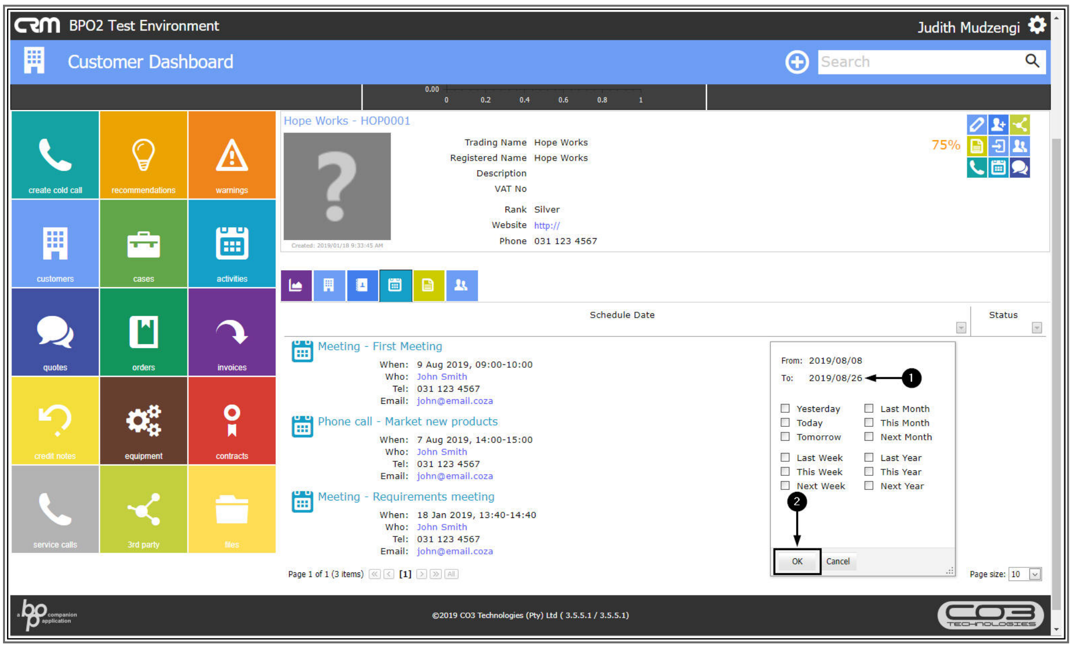
1. The ***From*** field will be populated with the selected date.
2. Hover over the ***To*** field, a ***down arrow*** will be displayed.
3. Click on the ***down arrow***.



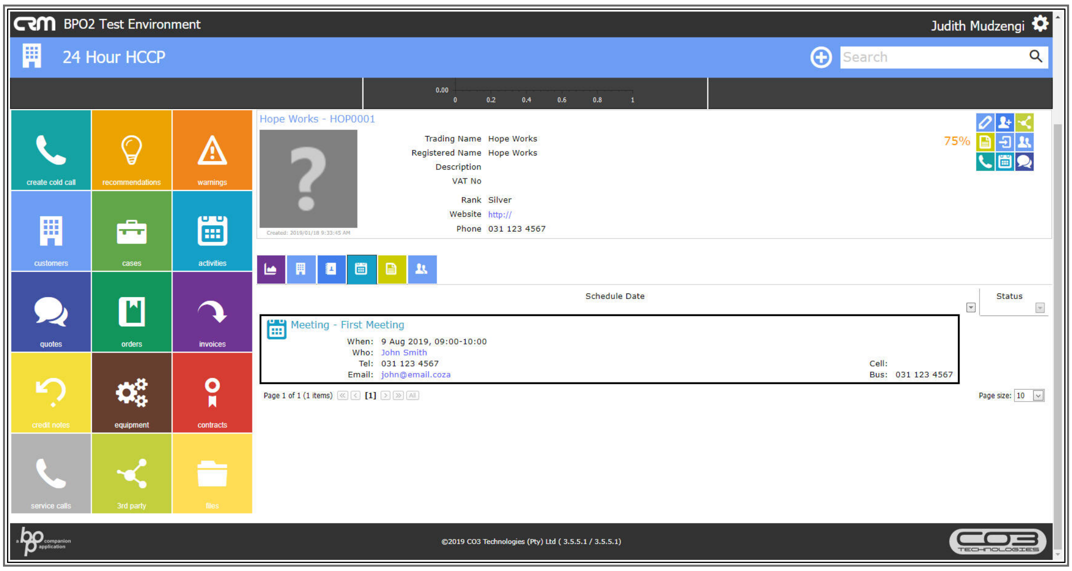
1. A ***calender*** will be displayed.
2. Select the relevant date.



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

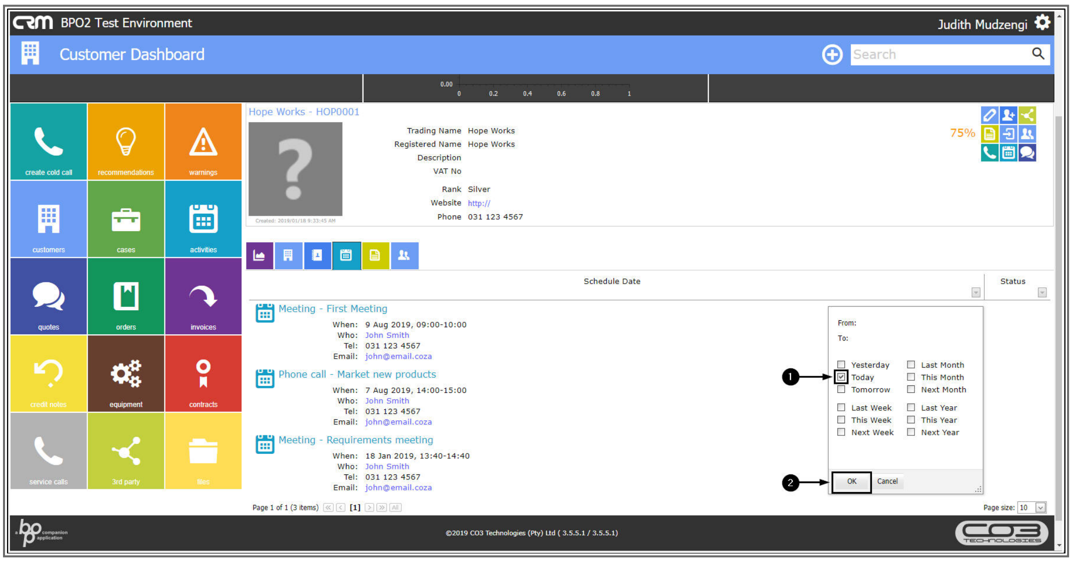


- Only open activities that fall within the selected date range will be displayed.

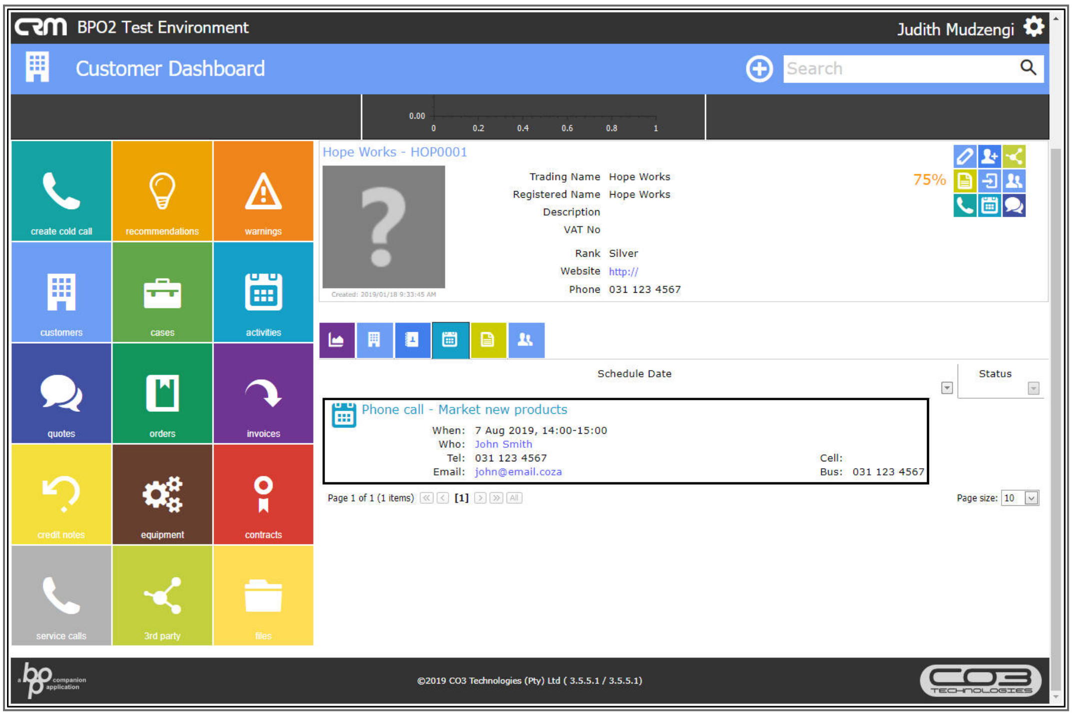


FILTER BY TIMELINE

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

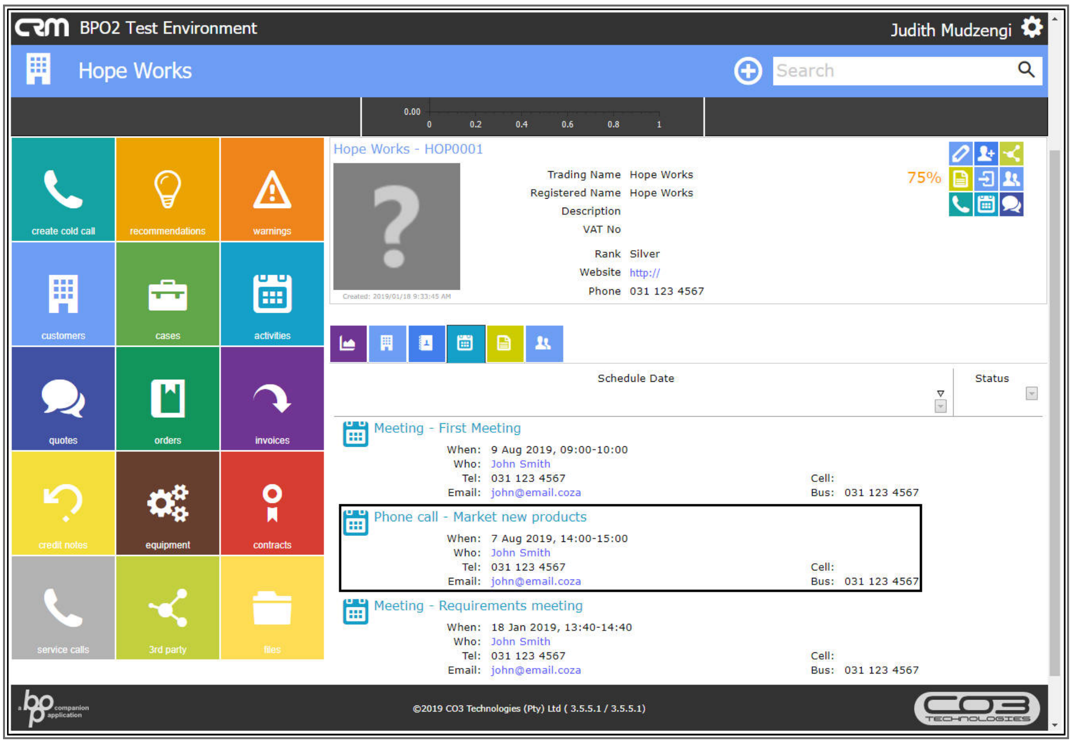


- Only open activities that fall within the selected timeline will be displayed.

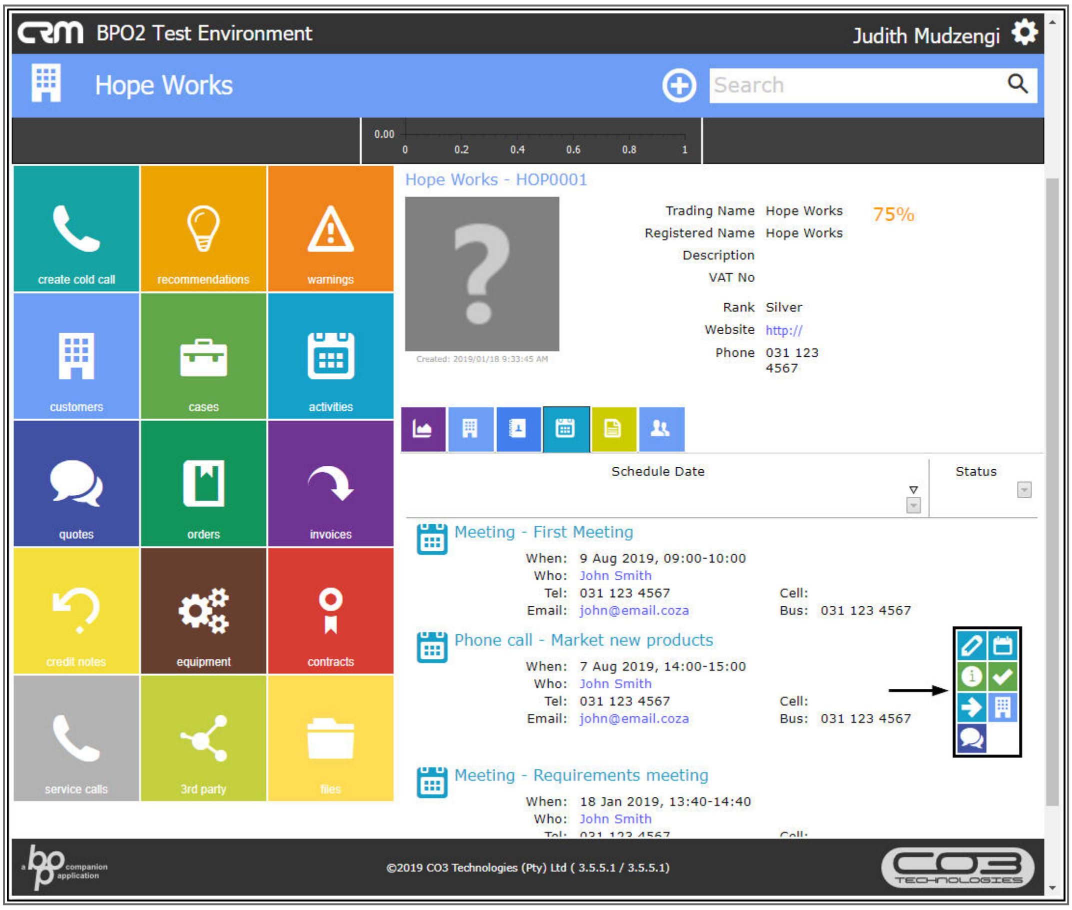


ACTION ITEMS

- Hover over an open activity.

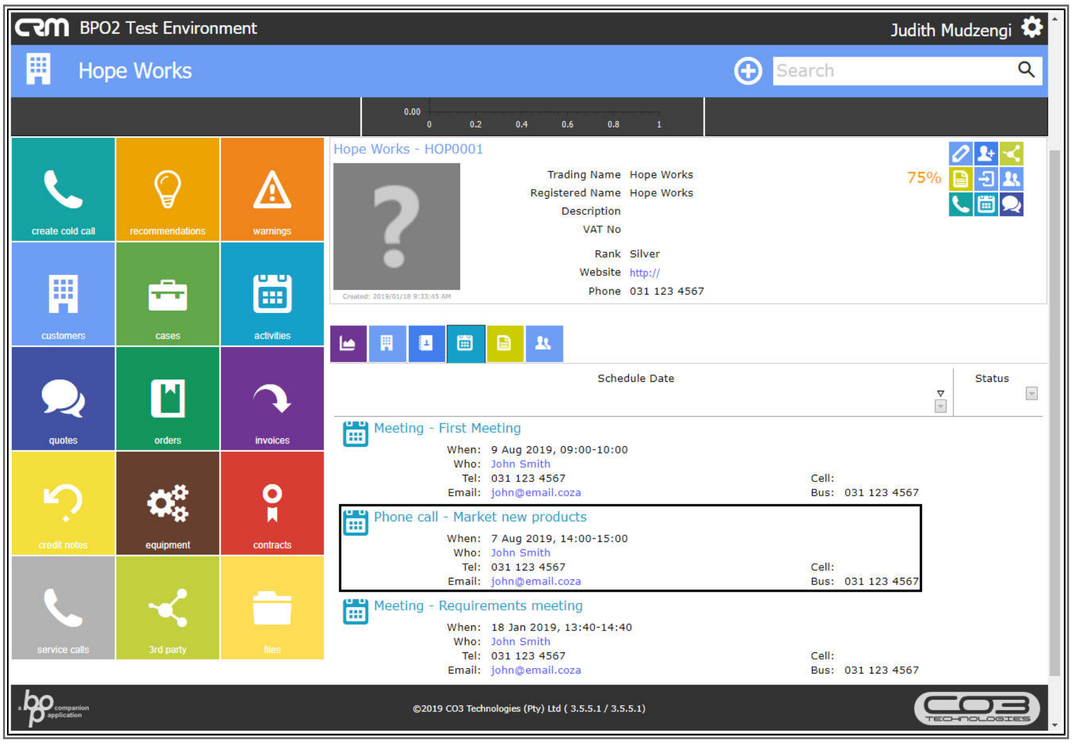


- The following action items will be displayed:
  - Reschedule this Activity
  - View / Edit Activity
  - Close this Case
  - View Case Info and History
  - View Customer
  - Next Action (close current activity and create new activity)
  - Create new Quote

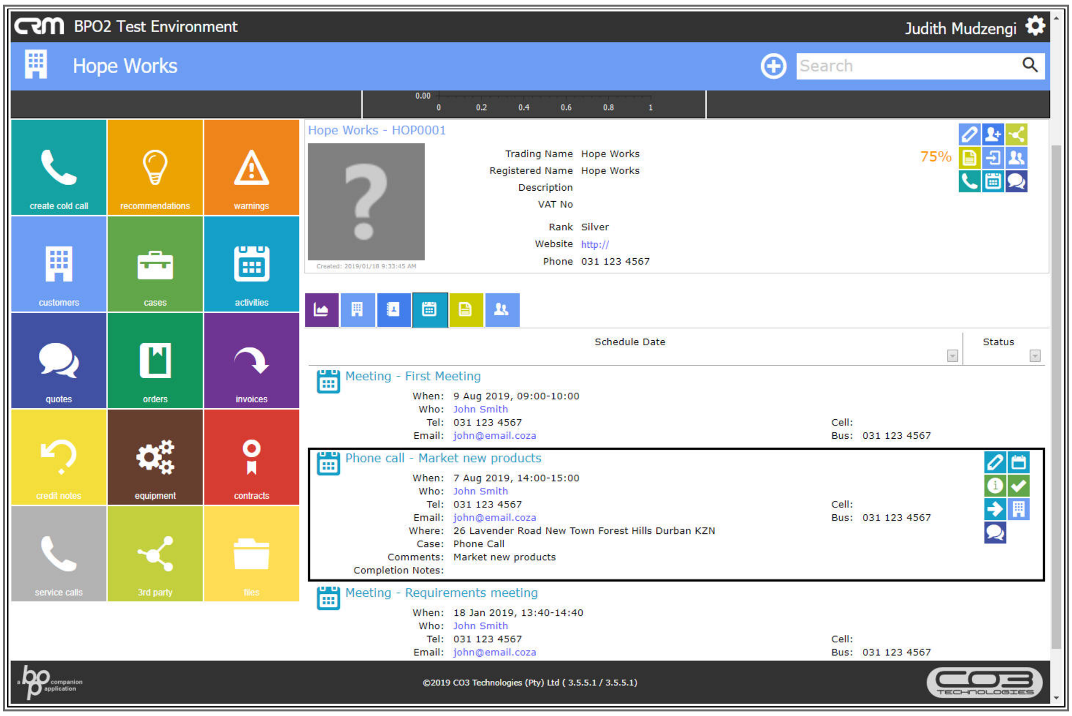


VIEW MORE DETAILS OF AN OPEN ACTIVITY

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



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



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