

We are currently updating our site; thank you for your patience.

# **CRM BASICS**

## **ACTIVITIES TARGET VERSUS ACTUAL**

Your Activities Summary will indicate your Target Activities vs Completed Activities for the last [30] days the amount of days are configurable according to your company requirements. The completed activities are split between Existing BPO Clients and New Customers.

The default Activity Types are: Meeting, Email, Phone Call and Site Inspection. These can be configured according to your company requirements.

Access: Webpage - http://[servername]:[portno]/BPOCRM/User.aspx

- 1. In the CRM **Homepage**,
- 2. Click in the **Activities for the Last 30 Days** summary frame.



CCM Example Company Abigail Milne 🌣						
🖾 Das	hboard	]	-1		2 🕒 Search	۹
Activitie	es for La	ist 30 D	ays	~	1 Month Performance 4 Mo	nth Pipeline
Description Phone call Email Meeting On Site	Target 10000 0 0 0	Existing Custmrs 0 0 0 0	New Custmrs 0 0 0 1	15 000.00 12 000.00 9 000.00 6 000.00	1 500.00 1 290.00 900.00 600.00	
inspection Site inspection	2 30 Sep 2016	0	0	3 000.00 0.00 2 Today	Cases Invoices Orders Quotes Jul 2019 . Recent Calendar	Aug 2019 Sep 2019 Oct 2019
create cold call 74 customers 5	recommend cases	ations 7 147	xarnings activities	7	Schedule Date Phone call - King Enterprises: Phone call to discuss press requirements and give overview of new product range. When: 22 Jul 2019, 13:00-14:00 Who: Jason King, King Enterprises Tel: Cell: Email: Bus: 01234 Meeting - Young Designs: Meeting set up for 25th July w Manager When: 22 Jul 2019, 11:00-12:00 Who: Paul Young, Young Designs Tel: 987654321 Email: Bus: 98765	status ant client 156789 14321
quotes	equipme	\$ ent	3rd party	Page 1 o	f 1 (2 items) 《 〈 【1】 ) (3) (月) CO3 Technologies (Pby) Ltd ( 3.5.6.0 / 3.5.6.0)	

## **ACTIVITIES FOR THE LAST 30 DAYS PAGE**

- 1. A report of your Activities for the Last 30 Days will open.
- 2. The graph in this page will display:
  - Actual activities for <u>new</u> customers in the last 30 days
  - Actual activities for <u>existing</u> customers in the last 30 days
  - The Target figures for each activity for the last 30 days (e.g. the target figure for Phone Calls in this example is 10,000 in 30 days).
- 3. The lower half of the page contains a frame that lists the customers linked to these activities.
- 4. Click on the **Status** drop-down arrow.



#### **STATUS MENU**

	LIVILIES	S TOT LASU	30 Day	S				
	10000	_					Actual for New Customers Actual for Existing Customers	
	9000						Target	
	8000	_						
	7000	_					2	
	6000						<i>[</i>	
	5000						*	
	4000							
	3000							
	2000							
	1000							4
3	0	Phone call	Email	Meeting	On Site inspection	Site inspection	2	
1				Schedule Dat	e			Status
On Site	inspection	- Young Desig	gns: Proposed	l installation of	3 machines			
I	When: Who: Tel:	24 Jun 2019, 09 Paul Young, Your 987654321	:00-11:00 ng Designs				Cell:	
	CITIBIL:						BUS: 90/034321	

- 1. The Status menu will appear, this will default to **All** (<u>All</u> customers with linked activities in the last 30 days will be displayed in this frame).
- 2. You can type in the **filter row** to filter by specific text e.g. a customer / contact name.
- 3. You can select to filter by customers with **completed** activities.



CCM Example Company	Abigail Milne 🍄 🍧	
💼 Activities for L	ast 30 Days	🔶 🖩 🤣
11000 9000 8000 7000 6000 4000 2000 1000 0 Phone call	Email Meeting On Site inspection	Actual for New Customers Actual for Kesting Customers Target Target Site inspection
	Schedule Date	Status
On Site inspection - Young I When: 24 Jun 201 Who: Paul Young, Tel: 987654321 Email: Page 1 of 1 (1 items) < ( [1] > >> Al	Designs: Proposed installation of 3 machines 9, 09:00-11:00 Young Designs	1 Enter text to filter (A) Complete 3 2

### TIME PERIOD SELECTION MENU

- 1. Click on the second drop-down arrow.
- 2. A time period selection panel will be displayed.
  - **From**: Either type in or click on the drop-down arrow and use the calendar function to select the filter from date.
  - **To**: Either type in or click on the drop-down arrow and use the calendar function to select the filter to date.
- 3. You can also select the applicable **check box(es)** to filter by e.g. Select

#### Week or Last Month.

- 4. When you have finished selecting the filter options;
  - Either select **OK** to save the changes,
  - Or select **Cancel** to annul the changes.
- 5. You can **Refresh** this page if required.
- 6. Click on the **Back** button to return to the previous page.



CCM Example Company	/	Abigail Milne 🌣
Activities for	Last 30 Days	<b>, ←</b> Ø
11000 10000 9000 8000 7000 6000 4000 3000 2000 1000 0 0	Phone call Email Meeting On Site inspection Site inspection	Actual for New Customers Actual for Existing Customers Target 5
	Schedule Date	Status 💌
On Site inspection - Youn When: 24 Jun 2 Who: Paul You Tel: 987654 Email: Pape 1 of 1 (1 Rems) @ C [1] > D A	Ig Designs: Proposed installation of 3 machines  Prom: To: To: To:  Yesterday Today Today Tomorrow Last Week Next Week K Next Week K K CK Cance	Last Month This Month Next Month Last Year This Year Next Year

#### CRM.000.007

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