

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

CRM ACTIVITIES

RECENT ACTIVITIES

This is a list of Activities over the last 7 days.

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

SELECT THE RECENT TAB

- 1. In the **Dashboard** (Home page) screen,
- Ensure that the **Recent** tab is selected to be able to view activities over the last 7 days.
- 3. If a recent Activity is completed, the activity heading and icon is feint (grey). You will not be able to access the Action buttons.

DISPLAY THE ACTION BUTTONS

- If an activity is yet to be completed, then the header and icon will be bold (blue) and if you hover over the activity, the Action buttons will appear:
 - 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



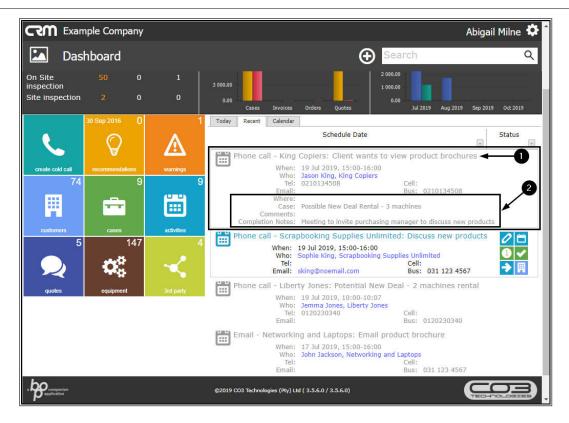
Recent Activities

| CCM Example Company Abi | | | | | | | | |
|---|------------------|--------------------------|---------------------|--|------------|--|--|--|
| 🔼 Das | hboard |] | -1 | Search | Q | | | |
| Activities for Last 30 Days | | | | 1 Month Performance 4 Month Pipeline | | | | |
| Description Phone call | | Existing Custmrs 0 | New Custmrs 5 | 15 000.00 6 000.00 12 000.00 1 000.00 1 000.00 | | | | |
| Email Meeting On Site inspection | 120 40 50 | 0 0 0 | 1 1 1 | 9 000.00 6 000.00 3 000.00 3 000.00 | | | | |
| Site inspection | 2 30 Sep 2016 | 0 | o | 0.00 Cases Invoices Orders Quotes 0.00 Jul 2019 Aug 2019 Sep 2019 | 9 Oct 2019 | | | |
| create cold call | recommenda | itions | Marnings | Schedule Date Phone call - King Copiers: Client wants to view product brochures When: 19 Jul 2019, 15:00-16:00 When: Lason King Copiers | Status | | | |
| customers | cases | 9 | activities | Tel: 0210134508 Cell: Email: Bus: 0210134508 Phone call - Scrapbooking Supplies Unlimited: Discuss new products When: 19 Jul 2019, 15:00-16:00 Who: Sophie King, Scrapbooking Supplies Unlimited Tel: Email: sking@noemail.com Bus: 031 123 4567 | | | | |
| quotes | equipmer | | A A Srd party | Phone call - Liberty Jones: Potential New Deal - 2 machines rental Whe: 19 Jul 2019, 10:00-10:07 Who: Jemma Jones, Liberty Jones Tel: 0120230340 Email: Bus: 0120230340 | | | | |
| | | | | ©2019 CO3 Technologies (Pty) Ltd (3.5.6.0 / 3.5.6.0) | | | | |

ACTIVITY QUICK VIEW SUMMARY

- 1. Single click on any activity.
- 2. To access a **quick view summary** of the activity information.





NAVIGATE TO CUSTOMER DASHBOARD

• Click on the blue link in the **Who** field of any of the recent activities.



| CCM Example | Abig | jail Milne 🍄 🔒 | | | | | | | |
|-----------------------------|--------------|--------------------------|---------------------|--|---|---|--|----------|--|
| 🔛 Dashb | oard | | | | | Searce | h | Q | |
| Activities for Last 30 Days | | | | 1 Mon | th Performance | 4 | 4 Month Pipeline | | |
| Description Phone call | | Existing Custmrs 0 | New Custmrs 5 | 15 000.00 12 000.00 | | 6 000.00 5 000.00 | | | |
| Email | | | | 9 000.00 | | 4 000.00 | | | |
| Meeting | | | | 6 000.00 | - | 2 000.00 | | | |
| On Site inspection | | | | 3 000.00 | | 1 000.00 | | | |
| Site inspection | | | 0 | 0.00 Coses | Invoices Orders Quotes | 00.0 2 lut | 019 Aug 2019 Sep 2019 | Oct 2019 | |
| ensite cold call | cases 147 | activ | | When: Who: Tel: Email: Meeting - King CC When: Who: Tel: Email: Phone call - Liber When: Who: Wh | 22 Jul 2019. 18:00-19:00 Jacon King, King Copiers Ozto134308 ty Jones: Call to discuss new 22 Jul 2019, 17:00-18:00 Jemma Jones, Liberty Jones 0120230340 | Cel Bus nager to discuss ne Cel Bus y product range Cel | 987654321 w products !: s: 0210134508 | Status | |
| quotes | equipment | 3rd p | | Email - Networkin When: Who: Tel: Email: | ng and Laptops: Email produc 22 Jul 2019, 16:00-17:00 John Jackson, Networking and La ngies (Pty) Ltd (3.5.6.0 / 3.5.6.0) | ct brochure ptops | | , | |

- 1. The selected **Customer Dashboard** screen will be displayed.
- 2. Here you can view the Customer/Company details and 12 Months Sales History.
- 3. A panel of **Links** tiles can direct you to further information regarding this customer.



Recent Activities



CRM.001.002

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