

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]:[port-no]/BPOCRM/User.aspx

SELECT THE RECENT TAB

1. In the **Dashboard** (Home page) screen,
2. 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

4. 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**

The screenshot displays a CRM dashboard for 'Example Company' with a user profile for 'Abigail Milne'. The dashboard includes a navigation menu with 'Dashboard' highlighted, a search bar, and three main sections: 'Activities for Last 30 Days', '1 Month Performance', and '4 Month Pipeline'.

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	5
Email	120	0	1
Meeting	40	0	1
On Site inspection	50	0	1
Site inspection	2	0	0

1 Month Performance

Bar chart showing performance for Cases, Invoices, Orders, and Quotes. A callout '2' points to the 'Invoices' bar.

4 Month Pipeline

Bar chart showing pipeline values for Jul 2019, Aug 2019, Sep 2019, and Oct 2019.

Recent Activities

Activity	When	Who	Tel	Cell	Bus
Phone call - King Copiers: Client wants to view product brochures	19 Jul 2019, 15:00-16:00	Jason King, King Copiers	0210134508	0210134508	
Phone call - Scrapbooking Supplies Unlimited: Discuss new products	19 Jul 2019, 15:00-16:00	Sophie King, Scrapbooking Supplies Unlimited	sking@noemail.com	031 123 4567	
Phone call - Liberty Jones: Potential New Deal - 2 machines rental	19 Jul 2019, 10:00-10:07	Jemma Jones, Liberty Jones	0120230340	0120230340	

Callout '3' points to the first activity title, and callout '4' points to the contact details of the second activity.

ACTIVITY QUICK VIEW SUMMARY

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

CRM Example Company | Abigail Milne

Dashboard

On Site inspection: 50, 0, 1
Site inspection: 2, 0, 0

3 000.00 | 0.00 | Cases | Invoices | Orders | Quotes

2 000.00 | 1 000.00 | 0.00 | Jul 2019 | Aug 2019 | Sep 2019 | Oct 2019

Today | Recent | Calendar

Schedule Date | Status

Phone call - King Copiers: Client wants to view product brochures
When: 19 Jul 2019, 15:00-16:00
Who: [Jason King, King Copiers](#)
Tel: 0210134508 | Cell: | Bus: 0210134508
Email: |
Where: | Case: Possible New Deal Rental - 3 machines
Comments: | Completion Notes: Meeting to invite purchasing manager to discuss new products

Phone call - Scrapbooking Supplies Unlimited: Discuss new products
When: 19 Jul 2019, 15:00-16:00
Who: [Sophie King, Scrapbooking Supplies Unlimited](#)
Tel: | Cell: | Bus: 031 123 4567
Email: |

Phone call - Liberty Jones: Potential New Deal - 2 machines rental
When: 19 Jul 2019, 10:00-10:07
Who: [Jemma Jones, Liberty Jones](#)
Tel: 0120230340 | Cell: | Bus: 0120230340
Email: |

Email - Networking and Laptops: Email product brochure
When: 17 Jul 2019, 15:00-16:00
Who: [John Jackson, Networking and Laptops](#)
Tel: | Cell: | Bus: 031 123 4567
Email: |

bp comparison application | ©2019 CO3 Technologies (Pty) Ltd (3.5.6.0 / 3.5.6.0) | CO3 TECHNOLOGIES

NAVIGATE TO CUSTOMER DASHBOARD

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

The screenshot displays a CRM dashboard for 'Example Company' with the user 'Abigail Milne'. The dashboard is divided into several sections:

- Activities for Last 30 Days:** A table showing performance metrics for different activity types.

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	5
Email	120	0	2
Meeting	40	0	1
On Site inspection	50	0	1
Site inspection	2	0	0
- 1 Month Performance:** A bar chart showing revenue for Cases, Invoices, Orders, and Quotes over the last month.
- 4 Month Pipeline:** A bar chart showing revenue for Jul 2019, Aug 2019, Sep 2019, and Oct 2019.
- Links Tiles:** A grid of tiles for 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'equipment', and '3rd party'.
- Customer Interactions:** A list of activities with details such as 'When', 'Who', 'Tel', 'Email', 'Cell', and 'Bus' numbers. An arrow points to the name 'Jason King, King Copiers' in the 'Who' field of a meeting entry.

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.

CRM Example Company
Abigail Milne ⚙️

Customer Dashboard 1
Search

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	5
Email	120	0	2
Meeting	40	0	1
On Site inspection	50	0	1
Site inspection	2	0	0

1 Month Performance

4 Month Pipeline

📞
create cold call

💡
recommendations

⚠️
warnings

🏢
customers

👜
cases

📅
activities

💬
quotes

📦
orders

🔄
invoices

📄
credit notes

⚙️
equipment

🏆
contracts 3

☎️
service calls

🤝
3rd party

📁
files

King Copiers - KIN0001

Trading Name: King Copiers 58%

Registered Name: King Copiers

Description

VAT No

Rank: Bronze

Website: <http://>

Phone: 0210134508

Created: 2019/06/21 2:45:48 PM

🏠
📞
👤
📅
📄
👥

12 Months Sales History

©2019 CO3 Technologies (Pty) Ltd (3.5.6.0 / 3.5.6.0)

CRM.001.002

