

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

CRM ACTIVITIES

CALENDAR

Your calendar will display all scheduled activities.

You can change your calendar display to view: Day, Work Week, Week, Month, Timeline and Agenda

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

SELECT THE CALENDAR TAB

1. In the **Dashboard** (Home page) screen,
2. Ensure that the **Calendar** tab is selected to be able to view activities over the last **7** days.
3. The calendar will open by default to **Work Week** view.
4. The **current day** will be highlighted.

The screenshot shows a CRM dashboard for 'Example Company' with user 'Abigail Milne'. The main content area is divided into three sections: 'Activities for Last 30 Days', '1 Month Performance', and '4 Month Pipeline'. Below these are several widgets: 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'equipment', and '3rd party'. The 'Calendar' widget is the focus, showing a weekly view for July 22-26, 2019. It features a scroll bar on the right and directional arrows on the top and bottom. A blue box highlights the 'Calendar' tab, and a blue box highlights the current date 'Tuesday, 23 July'. An orange bar at the top of the calendar indicates the current time is 9:55 AM. A scroll bar on the right is used to view all activities.

VIEW PREVIOUS OR FUTURE WEEKS

1. Use the **directional arrows** to view previous or future weeks. The **date frame** will display which week you are currently viewing.
2. The **current day** is highlighted.
3. The **orange bar** running across the calendar indicates the current **time** of day e.g. in this example it is 9:55 AM.
4. Use the **scroll bar** if necessary, to view all activities on the calendar.

CHANGE CALENDAR VIEW

5. Click on the applicable tab to change the view to:
 - **Day**
 - **Work Week**

- Week
- Month
- Timeline
- Agenda

6. In this example, **Month** is selected.

The screenshot shows a CRM dashboard for 'Example Company' with a user 'Abigail Milne'. The dashboard includes a search bar, a table for 'Activities for Last 30 Days', and two bar charts for '1 Month Performance' and '4 Month Pipeline'. The main area is the 'Calendar' view, which is currently set to 'Month'. The calendar shows a grid for the week of July 22-26, 2019. Numbered callouts indicate: 1. The calendar frame, 2. Directional arrows for navigation, 3. The current day (Tuesday, 23 July) highlighted in yellow, 4. 'Show more' links in the calendar cells, 5. The date frame showing '22 - 26 July 2019', and 6. The 'Month' view selected in the navigation tabs.

1. The calendar frame will now display the **Month** view.
2. Use the **directional arrows** to view previous or future months. The **date frame** will display which month you are currently viewing.
3. The **current day** is highlighted.

OPEN 'SHOW MORE' LINKS

4. You will note the Show more links in certain days of the month. This indicates that activity information is available here. Click on one of

these links.

The screenshot shows a CRM dashboard for 'Example Company' with user 'Abigail Milne'. It features a 'Dashboard' section with three main charts: 'Activities for Last 30 Days', '1 Month Performance', and '4 Month Pipeline'. Below these are several activity tiles: 'create cold call' (0), 'recommendations' (5), 'warnings' (5), 'customers' (74), 'cases' (9), 'activities' (9), 'quotes' (5), 'equipment' (147), and '3rd party' (4). A calendar widget is displayed in 'Day' view for July-August 2019. Callout 1 points to the calendar frame, callout 2 to the scroll bar, callout 3 to a 'Show more' link on Tuesday 23rd, and callout 4 to another 'Show more' link on Wednesday 31st.

1. The calendar frame will now open the **Day** view.
2. Use the **scroll bar** if necessary, to view all the hours in the day.
3. This screen will display more detail regarding the day's activity e.g. the Customer Name and Activity description.

SAVE ACTIVITY SCREEN

- Click on any one of these activities.

CRM Example Company | Abigail Milne

Dashboard | Search

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

Category	Value
Cases	~8,000.00
Invoices	~14,000.00
Orders	~6,000.00
Quotes	~6,000.00

Month	Value
Jul 2019	~6,000.00
Aug 2019	~1,000.00
Sep 2019	~2,000.00
Oct 2019	~1,000.00

Activities Calendar

Today | Recent | Calendar

24 July 2019 | Day | Work Week | Week | Month | Timeline | Agenda

Wednesday, 24 July

11:00

12:00 PM

1:00 | ABI Goods: Call to set up meeting with clients buying officer

2:00

3:00

4:00

5:00 | ABI Goods: New Potential contract - copiers

6:00

7:00

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1. The **Save Activity** screen will be displayed.
2. Here you can view all the activity details. You can also **edit** the details here if required, e.g. add another attendee.
3. If you have made any changes, click on **Save**.
4. Or click on **Back** to return to the **Dashboard** (Home page) screen.

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main form is titled 'Save Activity' and contains the following fields:

- Case:** Subject: New Potential contract
- Case State:** * Case State: Distant prospect - on hold (5%), Percentage: 5%
- Activity:** * Type: Phone call, Address: (empty), * Subject: Call to set up meeting with clients buying officer, Comments: Need to arrange meeting to present new products
- Activity Attendees:** Attendees: Abigail Milne, Lucy. Page 1 of 1 (2 items) [1] [All]. Send Email Invites: *note that invitations can only be sent to attendees with valid email addresses
- Schedule:** Date: 24 Jul 2019, from: 13:00 to 14:00, Reminder: Email , SMS , 30 minutes before scheduled start
- Quote:** (empty)

Numbered callouts in the image:

- 1:** Points to the 'Save Activity' header.
- 2:** Points to the 'Activity' field.
- 3:** Points to a 'Save' button at the bottom of the form.
- 4:** Points to a save icon in the top right corner of the form area.

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