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

CRM CUSTOMERS

WARNINGS

Warnings are notifications of overdue activities, that can be directly actioned.

A full list of warnings can be accessed from the Dashboard (Home page).

Client-specific warnings can be accessed from the from the Customer Dash-board as set out below.

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

ACCESS WARNINGS FROM THE DASHBOARD (HOME PAGE)

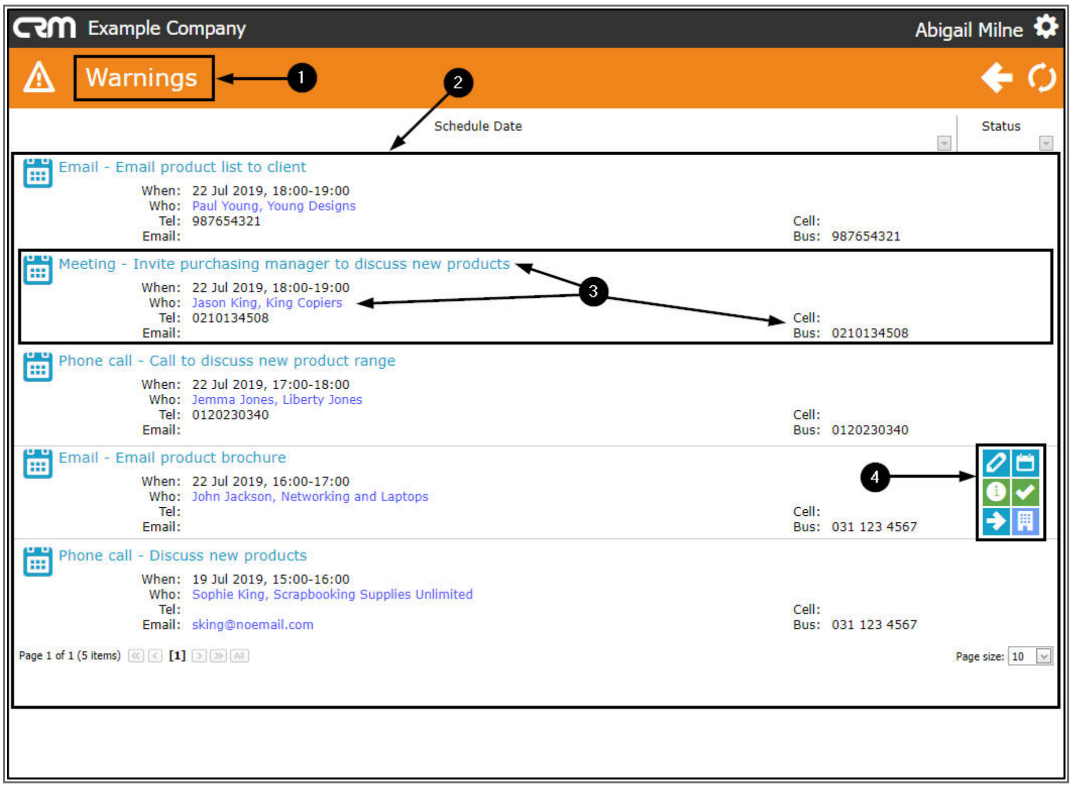
1. In the **Dashboard** (Home page) screen,
2. Click on the **Warnings** tile.

THE WARNINGS SCREEN (ALL CUSTOMERS)

1. The **Warnings** page will be displayed.
2. Here you can view all the warnings - where you have activities pending.
3. Each warning lists:
    - The activity **subject**
    - **When** the activity was scheduled for
    - **Who** the activity was scheduled with
    - **Contact details** for the activity:
        - Tel:
        - Email:
        - Cell:
        - Business No:

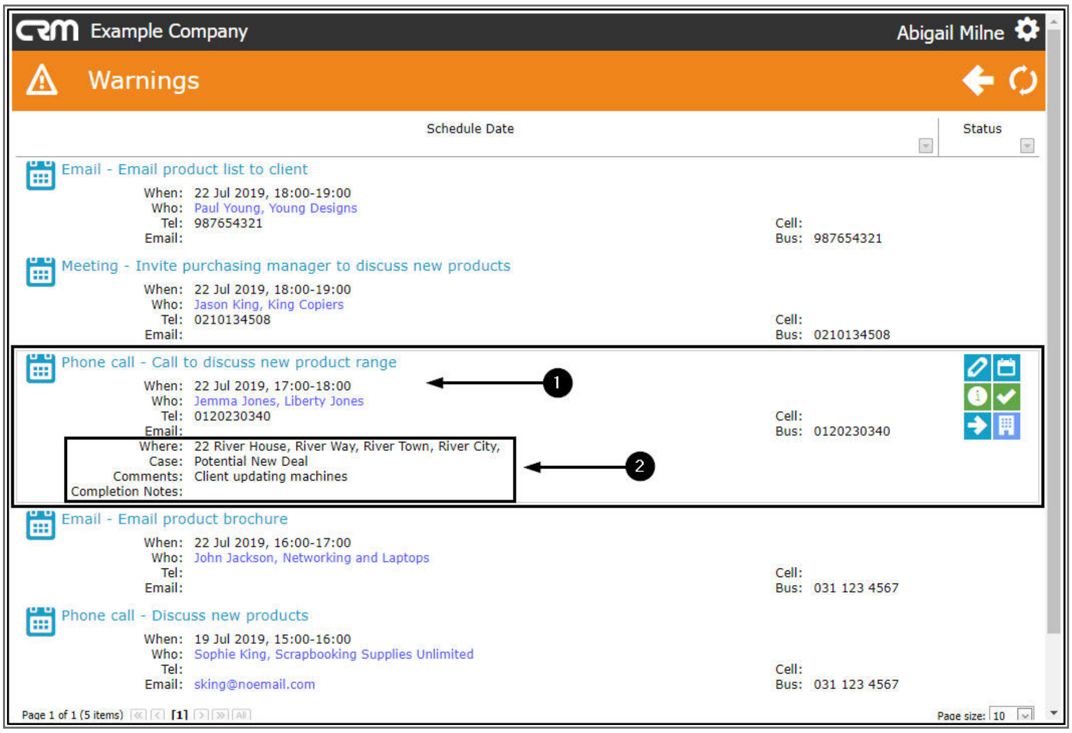
WARNINGS 'ACTION ITEM' BUTTONS

4. Hover over any activity to reveal the **Action Item** buttons:
   - **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**



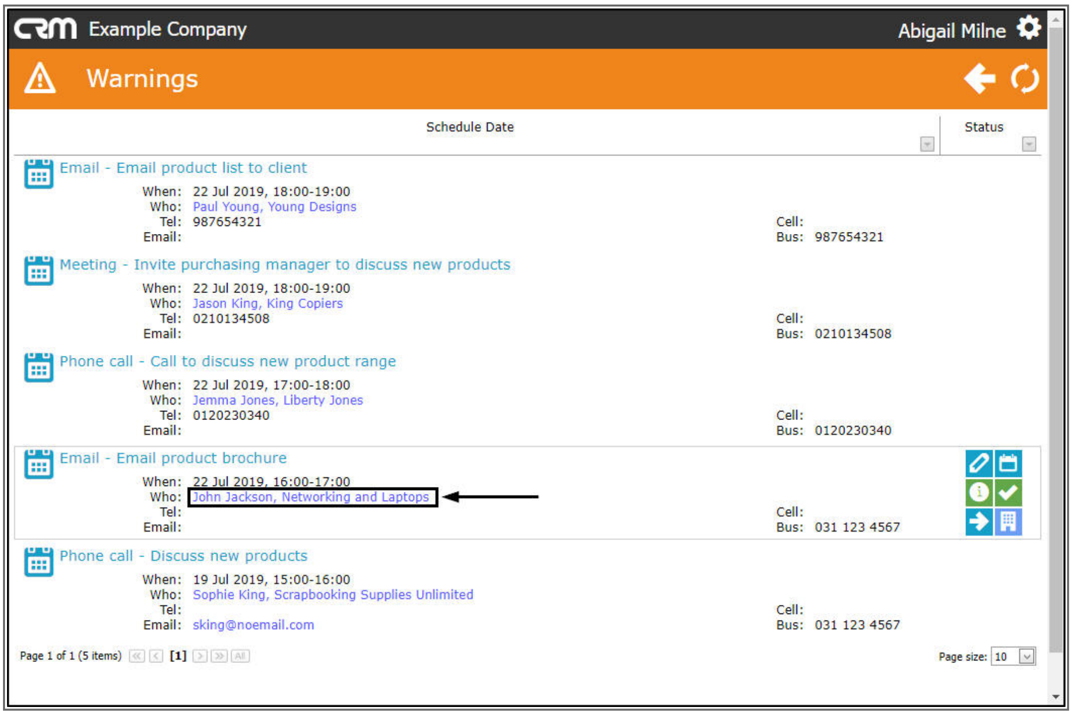
VIEW ACTIVITY SUMMARY

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



NAVIGATE TO THE CUSTOMER DASHBOARD

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

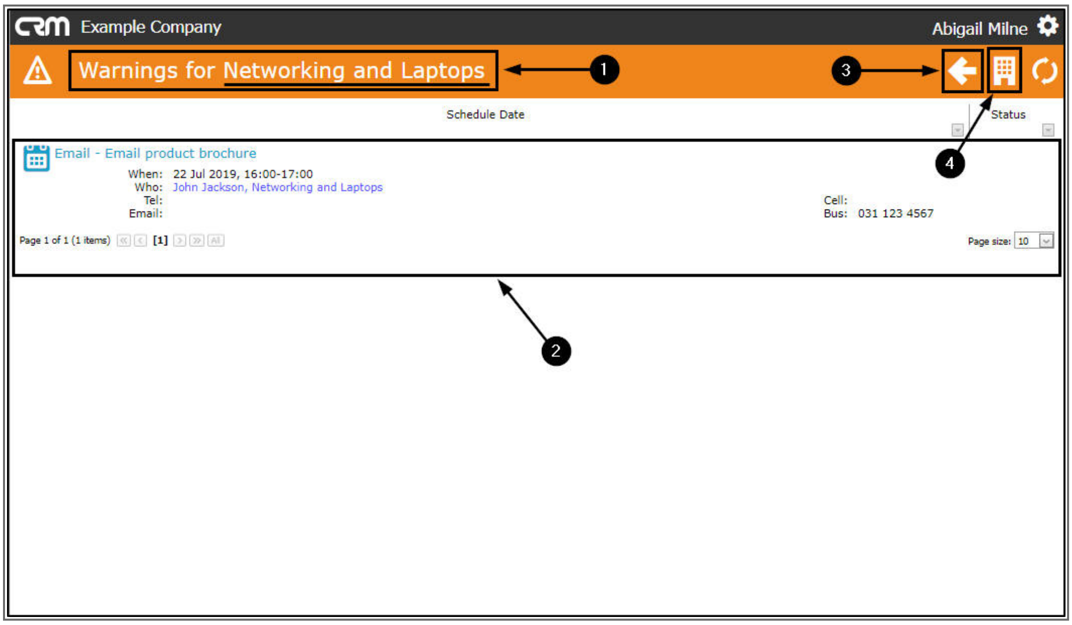


1. The selected **Customer Dashboard** screen will be displayed.
2. Here you can view the **Customer/Company details** and **12 Months Sales History**.
3. A panel of **Links** tiles can direct you to further information regarding this customer.

ACCESS WARNINGS FROM THE CUSTOMER DASHBOARD

4. Click on the **Warnings** tile.

1. The **customer specific** warning screen will be displayed.
2. Here you can only view the warnings for that particular customer.
    - Follow the steps as explained above to reveal the warnings action buttons or view the activity summary.
3. Click on **Back** to return to the previous page.
4. Click on the **Customer icon** to return to the Customer page.


Example Company
Abigail Milne
Warnings for Networking and Laptops
Schedule Date
Status
Email - Email product brochure
When: 22 Jul 2019, 16:00-17:00
Who: John Jackson, Networking and Laptops
Tel:
Email:
Cell:
Bus: 031 123 4567
Page 1 of 1 (1 items)
Page size: 10
1
2
3
4

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