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

CRM CUSTOMERS

ACTIVITIES

In CRM, an activity is any type of interaction that involves your customer:

- A **Call**
- An **Email**
- A **Meeting**
- An **On-Site Inspection**

A full list of all customers activities can be accessed from the **Dashboard** (Home Page).

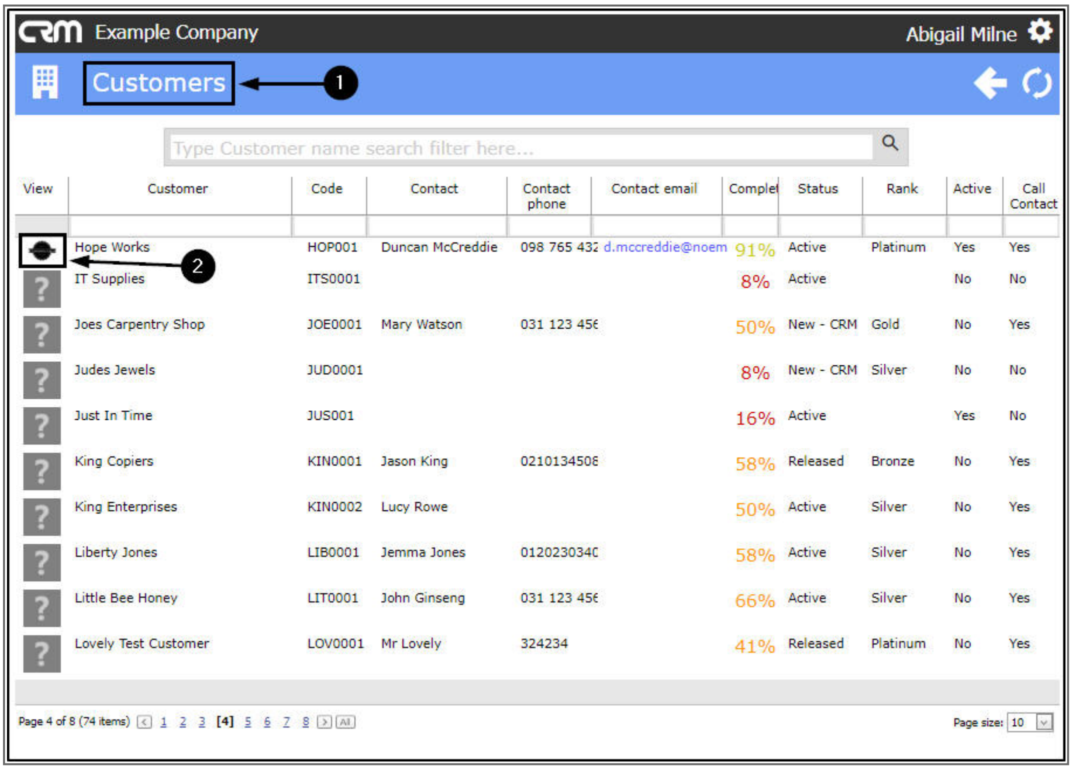
A Client specific list of activities can be accessed from the **Customer Dashboard** (Customer Home page), as set out below

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

ACCESS CLIENT SPECIFIC LIST OF ACTIVITIES

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

1. The **Customers** listing page will open.
2. Click on the **customer icon** in the **View** column.



1. The selected **Customer Dashboard** (Customer Home page) will open.
2. Click on the **Activities** tile.

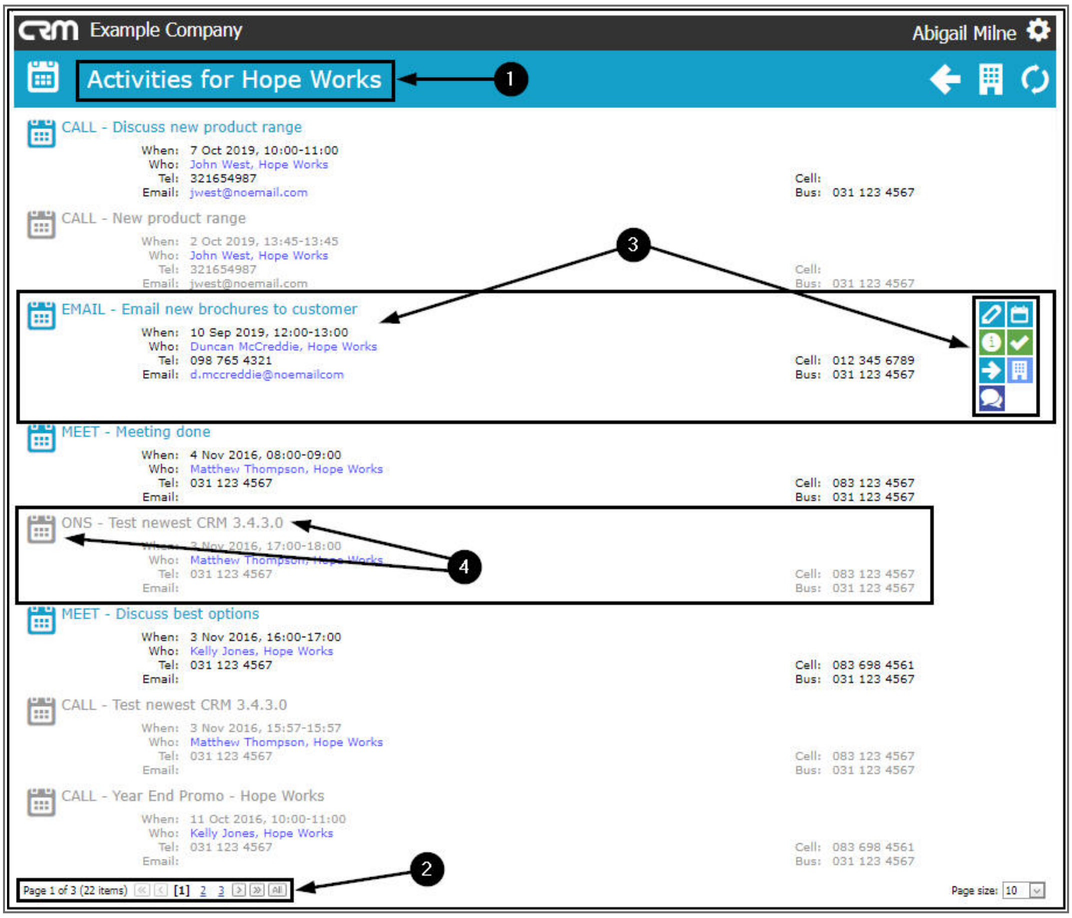
1. The **Activities for [**Customer Name**]** page will open listing <u>all</u> the activities linked to this customer.
2. The Page Reference field notes how many activities there are and on how many pages.

VIEW ACTIVITY ACTION BUTTONS

3. **Hover over** any activity to display the activity **Action 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
- New Quote

4. Any **greyed out** activities are linked to a different salesman - Action buttons will not be available and you cannot edit these activities.



VIEW SUMMARY OF ACTIVITY INFORMATION

1. **Single click** on an activity, to access a quick view **summary** of the activity information.

2. If the selected activity is linked to yourself then this single click will also keep the **Action buttons**consistently displayed in the selected activity frame.