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

CRM CUSTOMERS
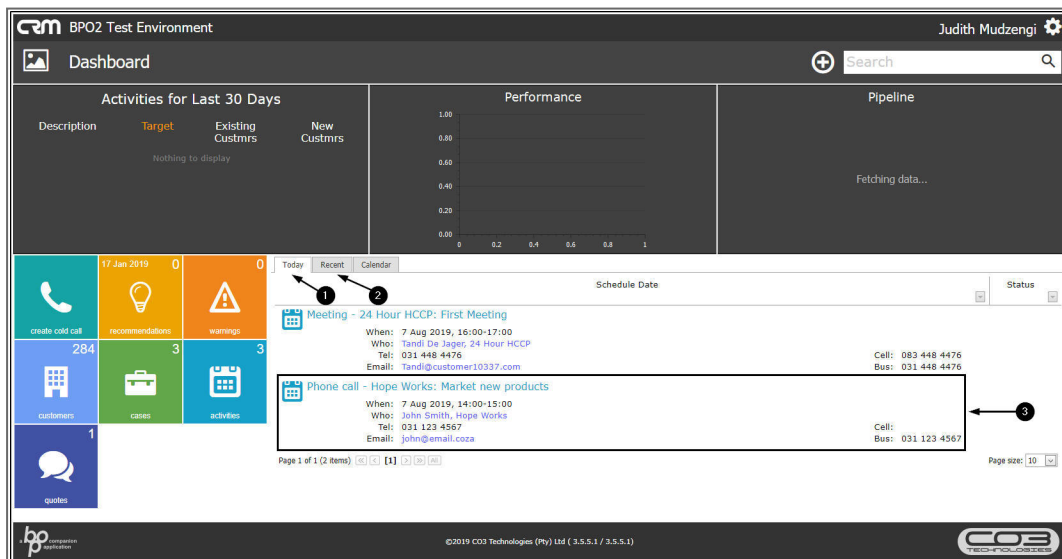
OPEN ACTIVITIES

Open Activities will list all open activities for the selected customer, and can be actioned directly from here.

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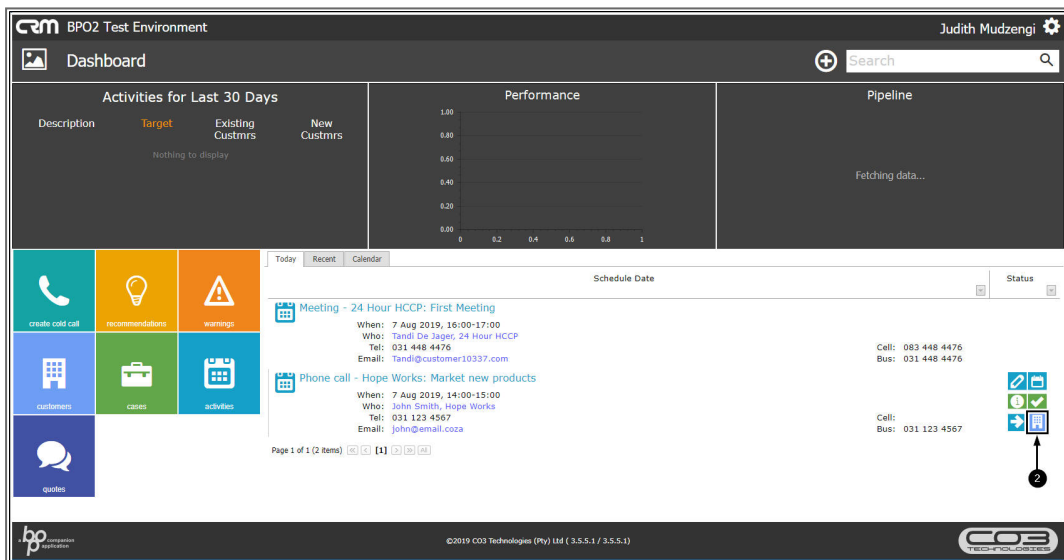
OPEN ACTIVITIES

1. The **Today** tab will be selected by default displaying customer activities due on that day.
2. If you cannot find the information you are looking for within this tab, click on the **Recent** tab.
3. Hover over an activity linked to the customer you wish to view open activities for.
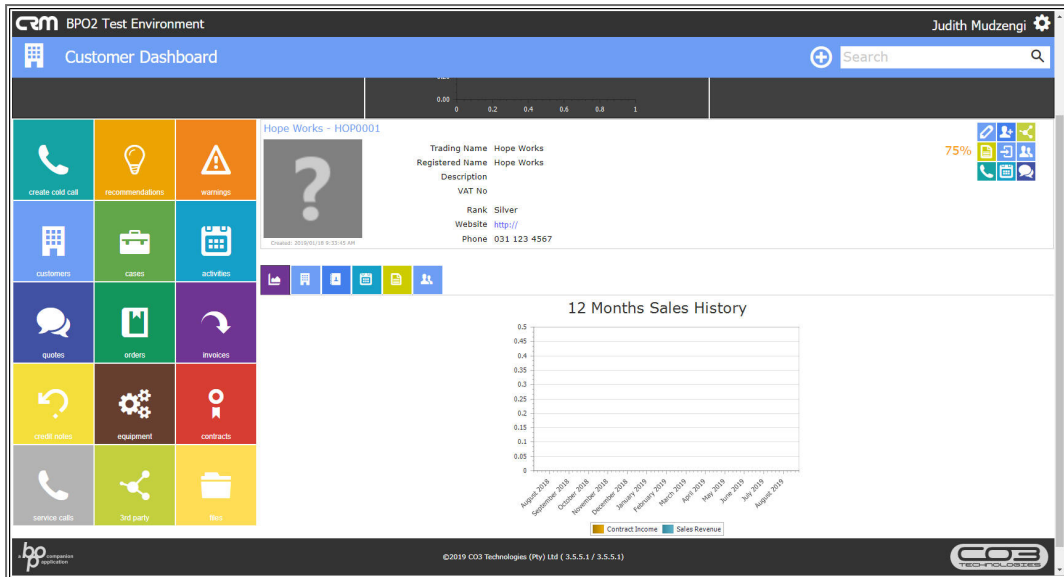
1. **Action icons** will be displayed to the right of the customer activity you are hovering over.
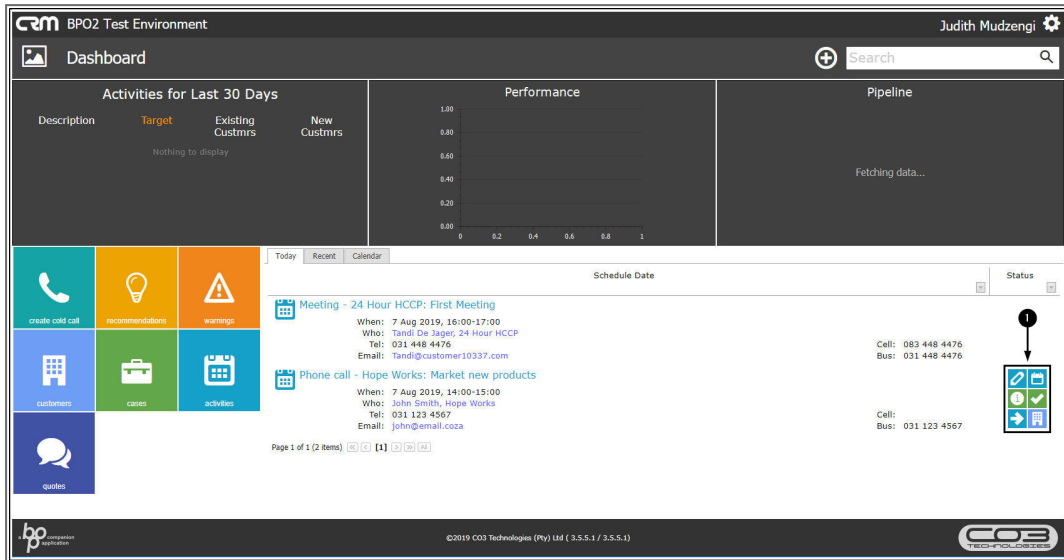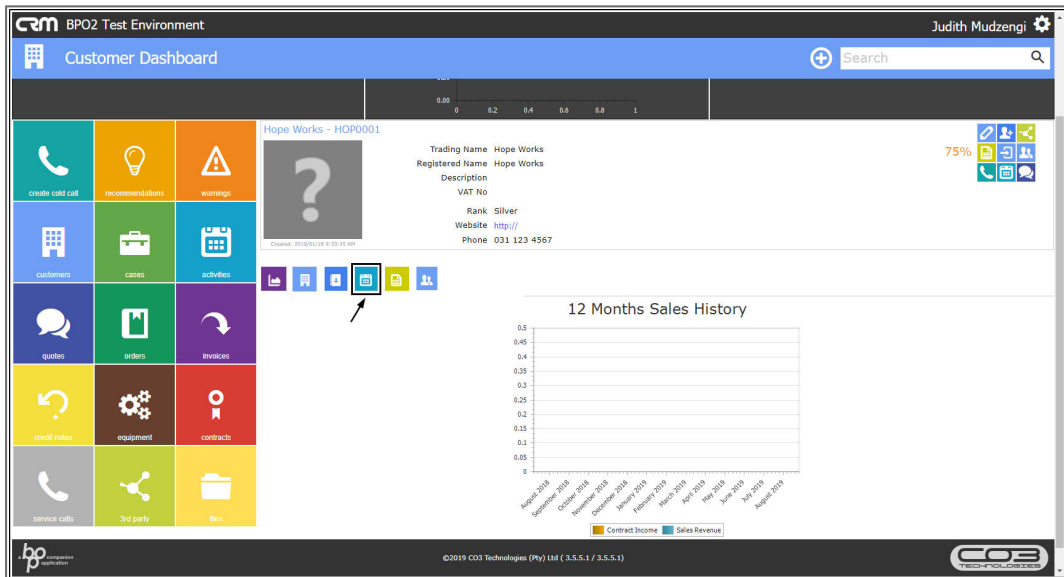

2. Click on the **View Customer** icon.

- The **Customer Dashboard** will be displayed.

- Click on the **Open Activities** icon.

- All open activities for the selected customer will be displayed.

SORTING DATA

- Click on the **Schedule Data** column header.

1. A **Sort** button will be revealed, pointing upwards and
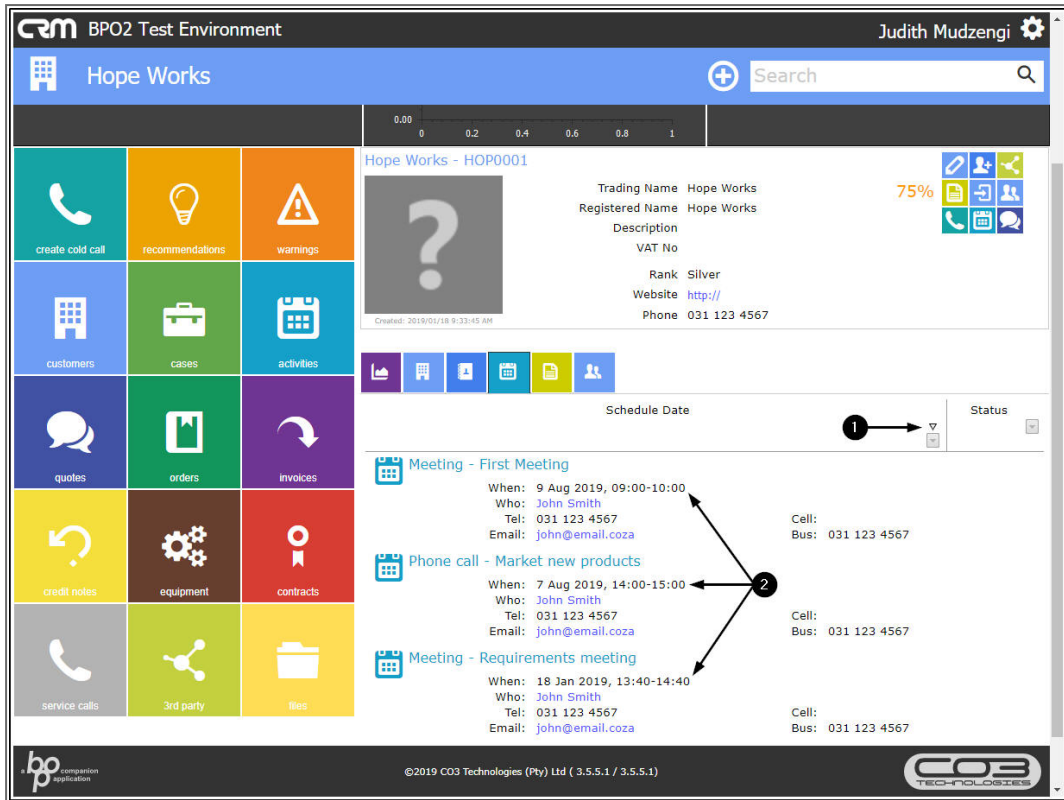2. all open activities will be sorted in **ascending** order - **earliest** date first.
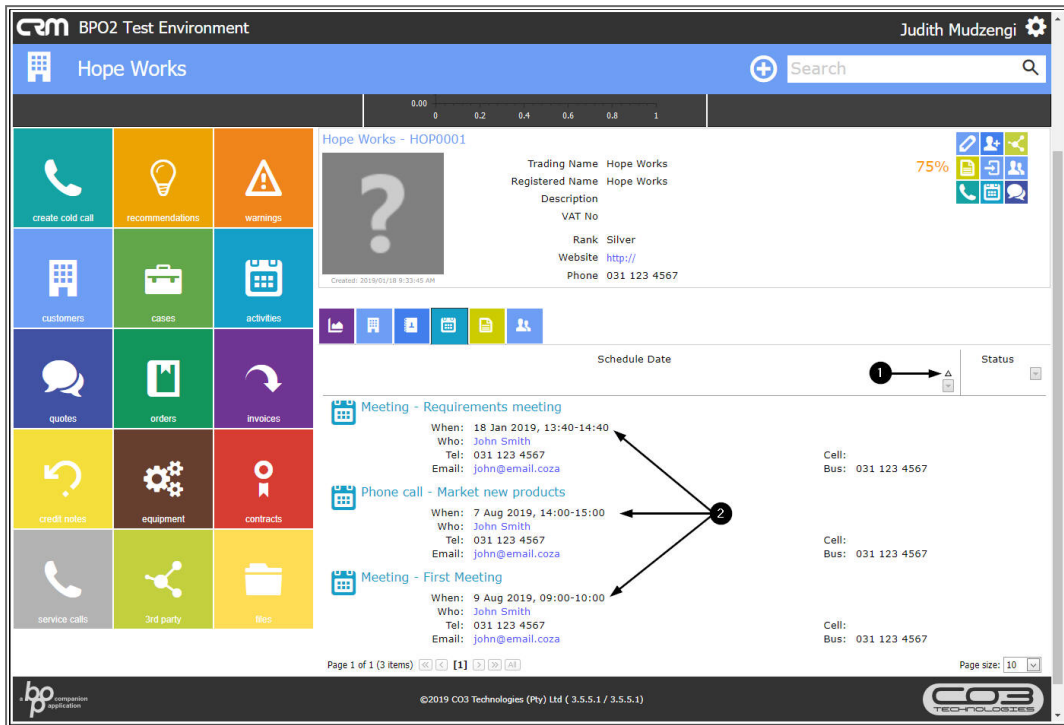
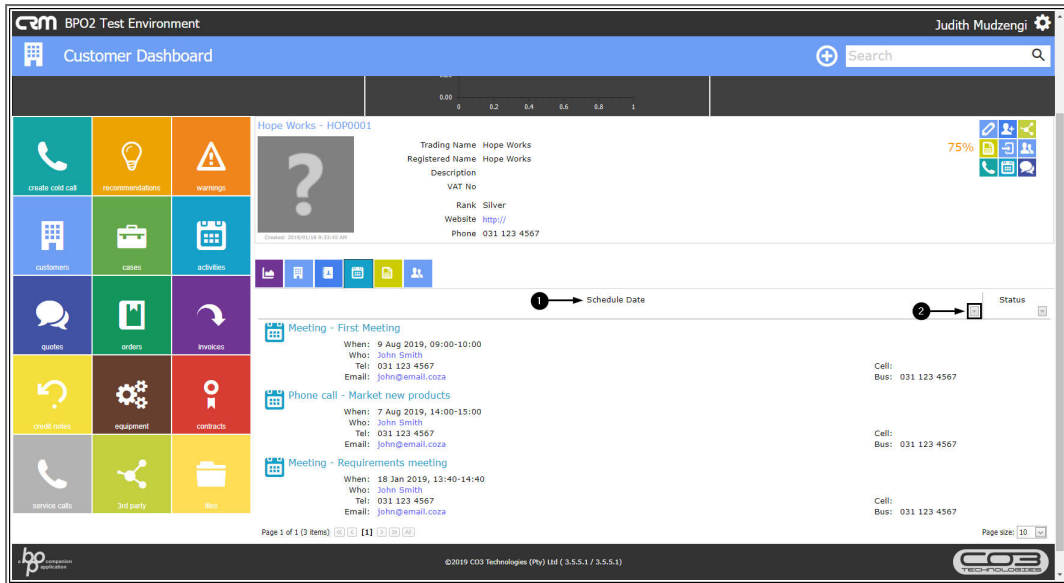- To sort in descending order, click on the **Schedule Data** column header.

1. The **Sort** button will now be pointing downwards and
2. all open activities will be sorted in **descending** order - **latest** date first.
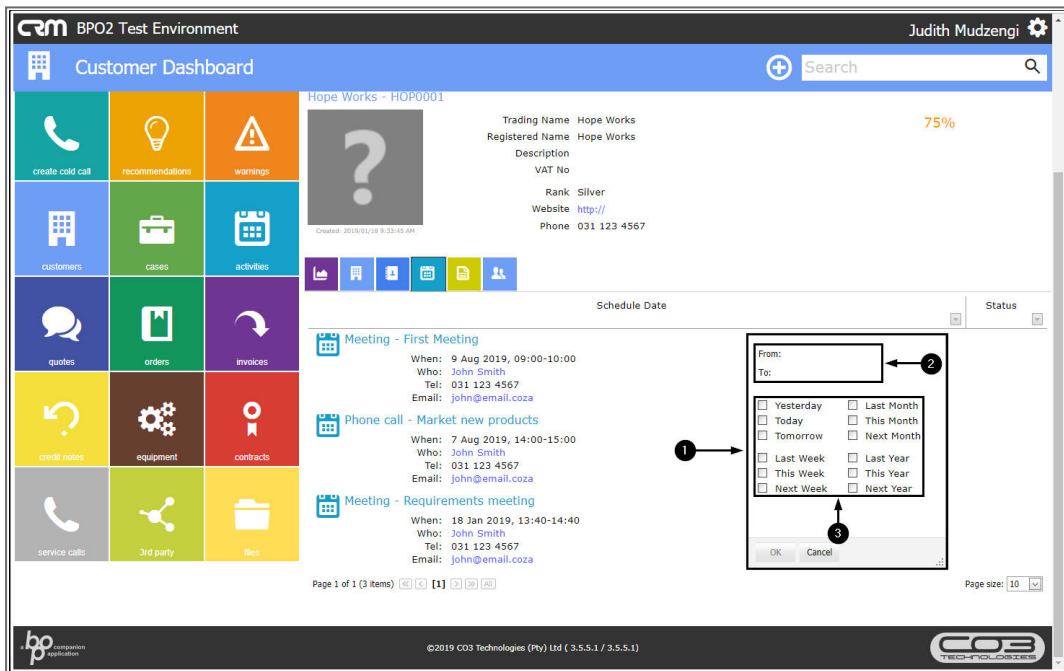
FILTER OPEN ACTIVITIES BY SCHEDULE DATE

You can filter the list of all open activities by schedule date.

1. On the **Schedule Date** section,
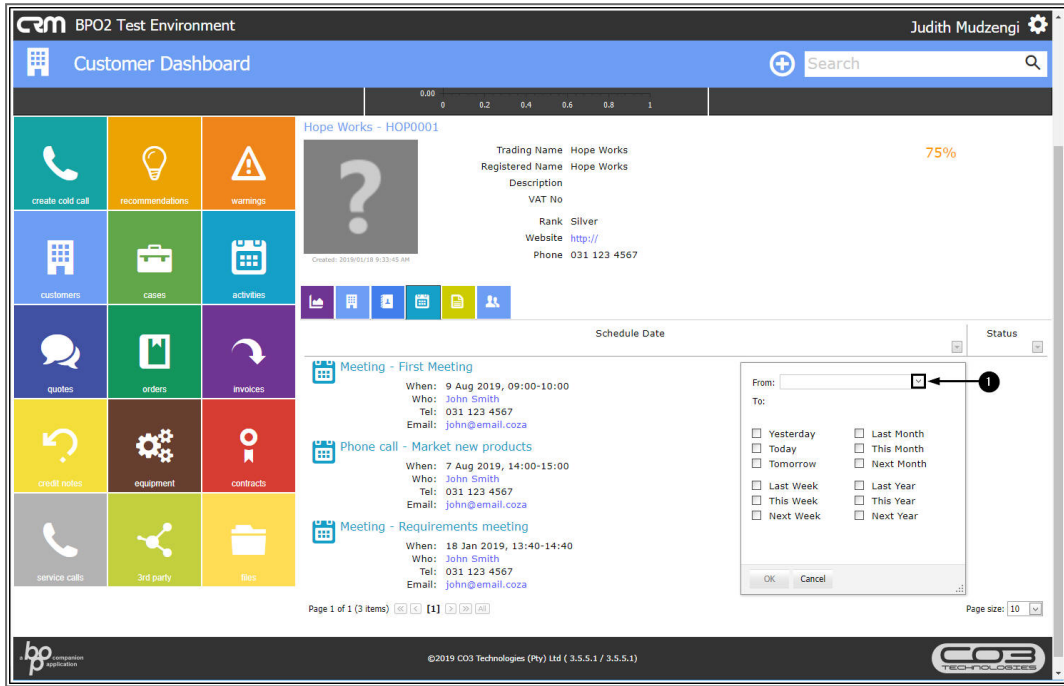2. click on the **down arrow**.

1. A **menu** will be displayed.
2. You can either filter by **Date Range** or
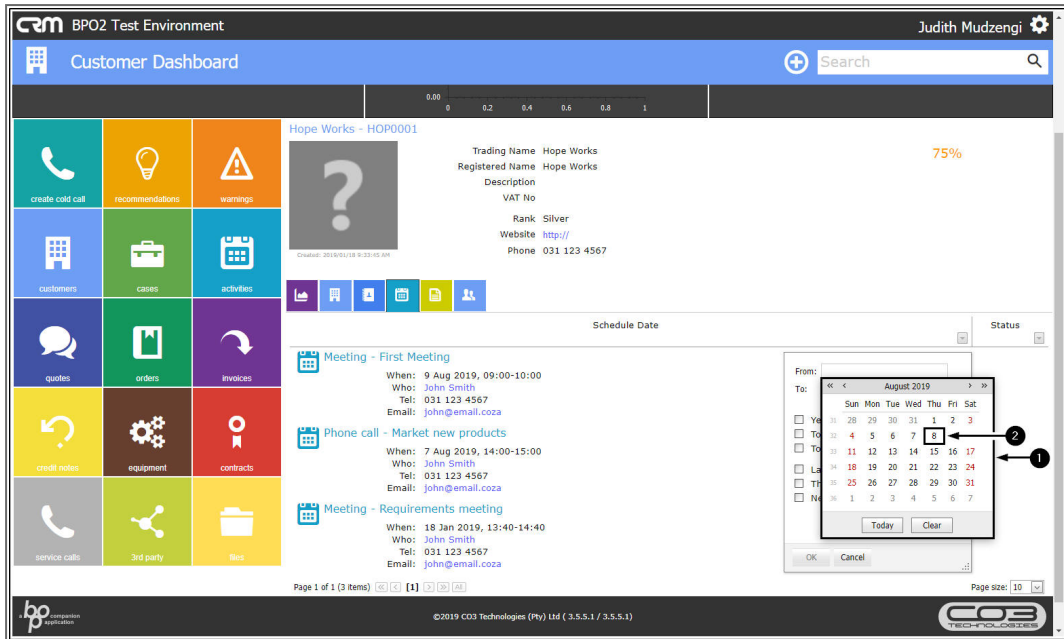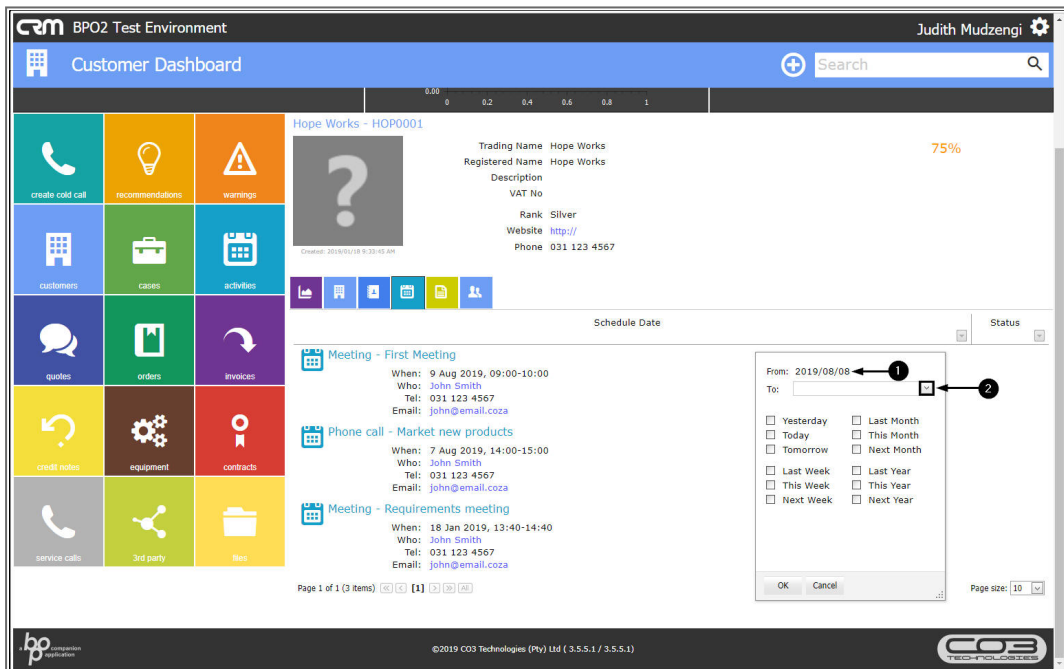3. **Timeline**.

FILTER BY DATE RANGE

1. Hover over the **From** field, a **down arrow** will be displayed.

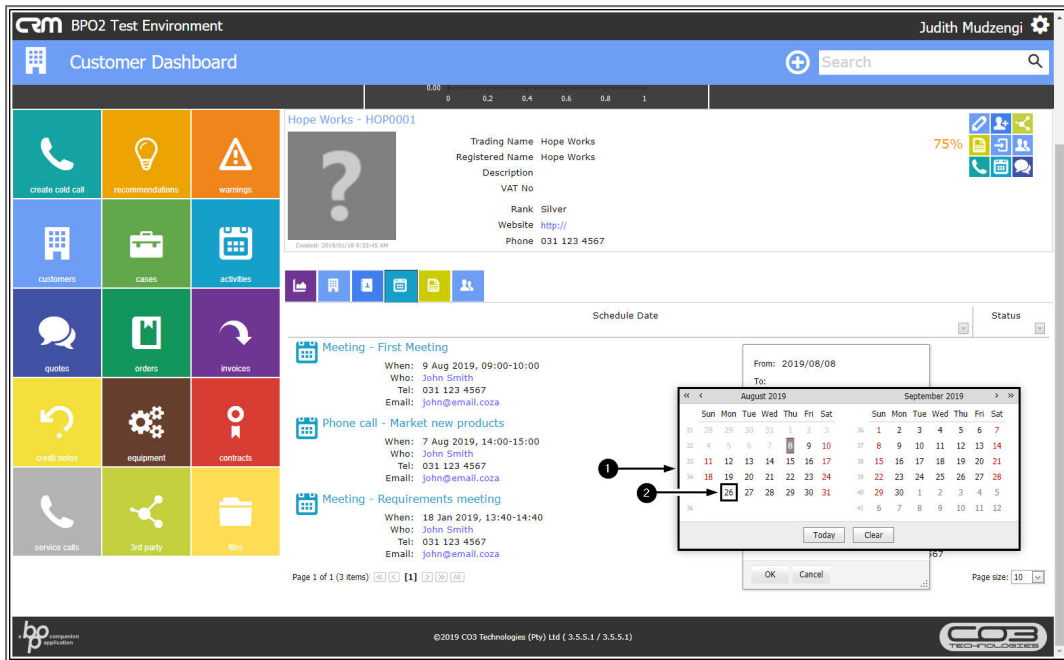1. Click on the **down arrow**.

1. A **calender** will be displayed.
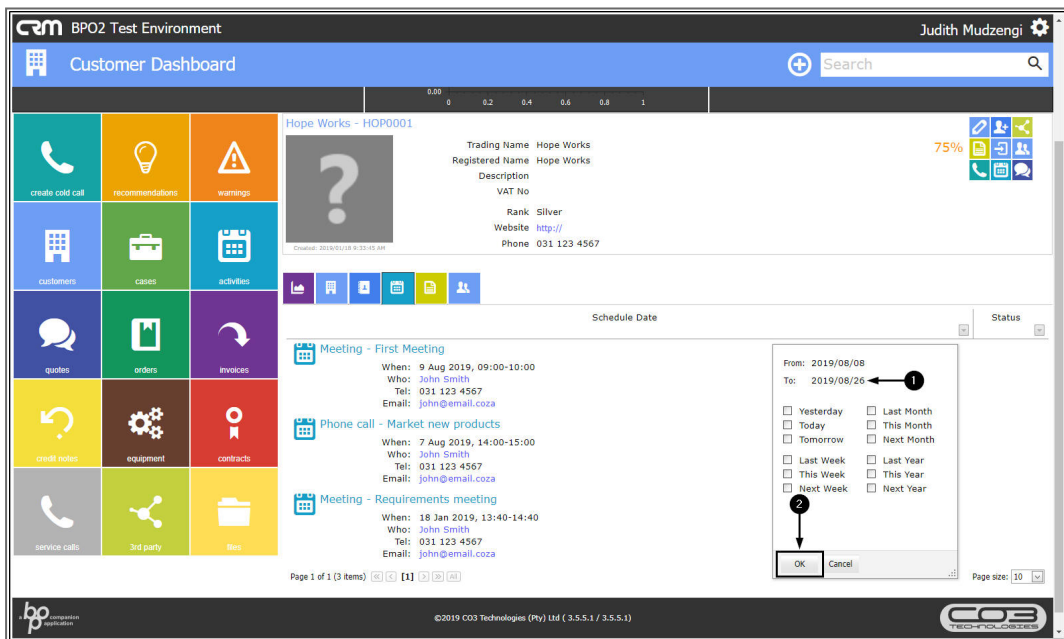2. Select the relevant date.

1. The **From** field will be populated with the selected date.
2. Hover over the **To** field, a **down arrow** will be displayed.
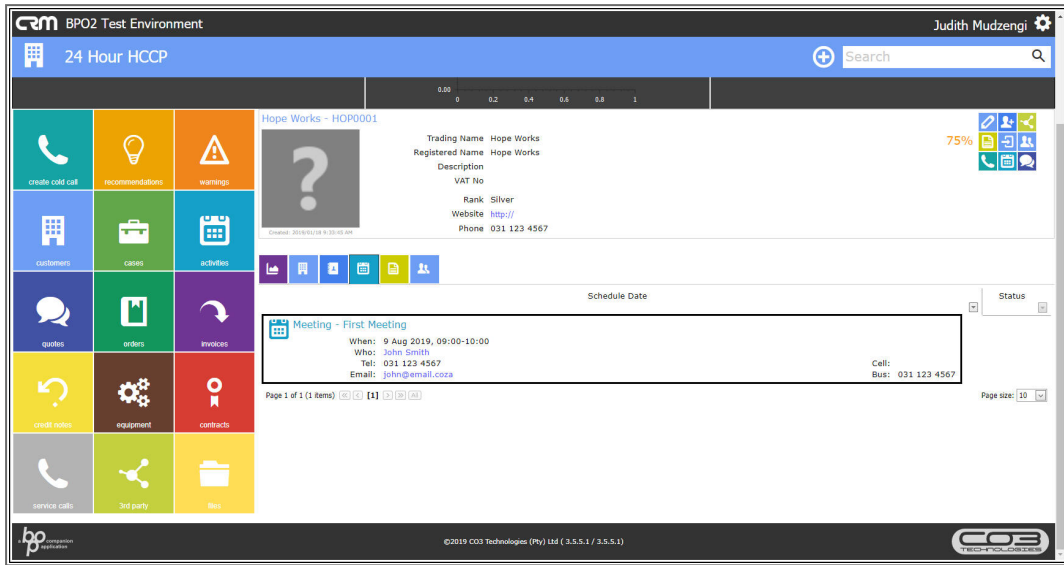3. Click on the **down arrow**.

1. A **calender** will be displayed.
2. Select the relevant date.

1. The **To** field will be populated with the selected date.
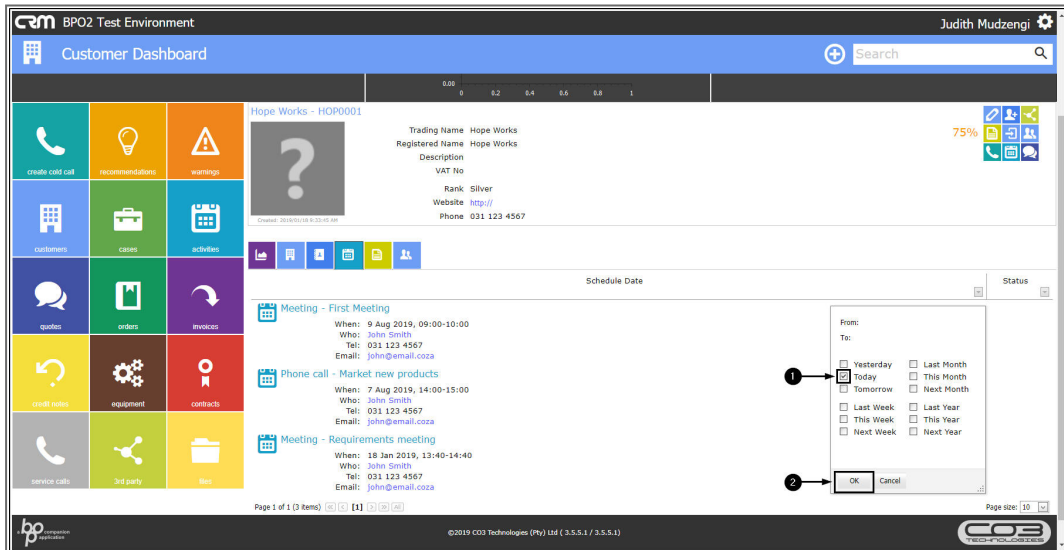2. Click on **Ok**.

- Only open activities that fall within the selected date range will be displayed.
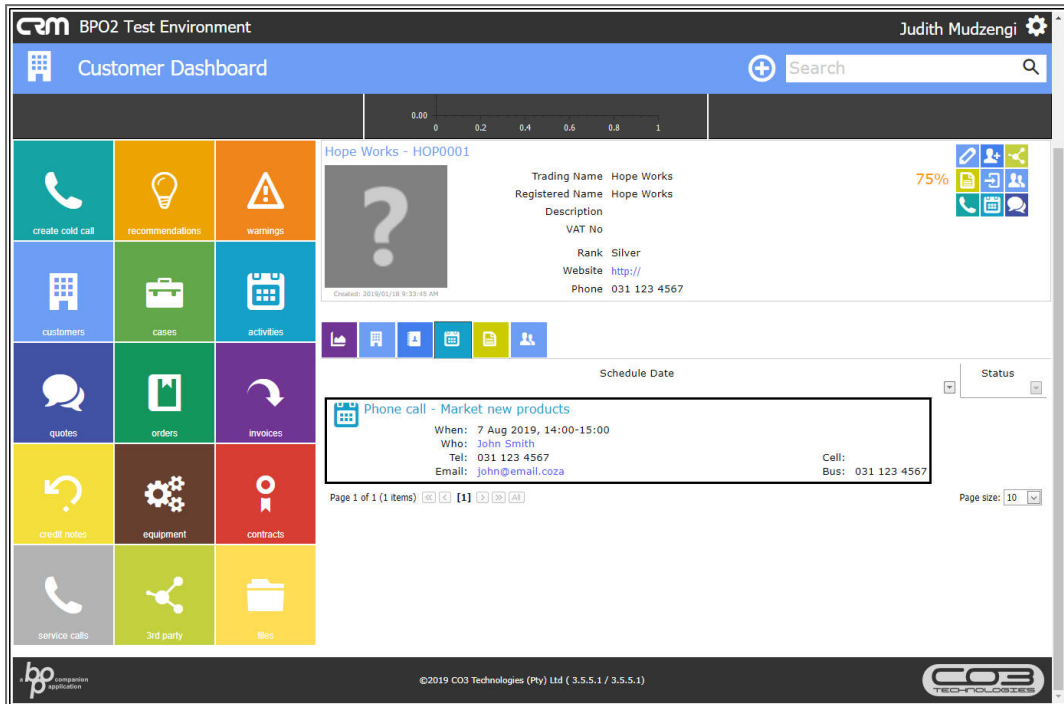

FILTER BY TIMELINE

1. Click on the **checkbox** of the relevant timeline.
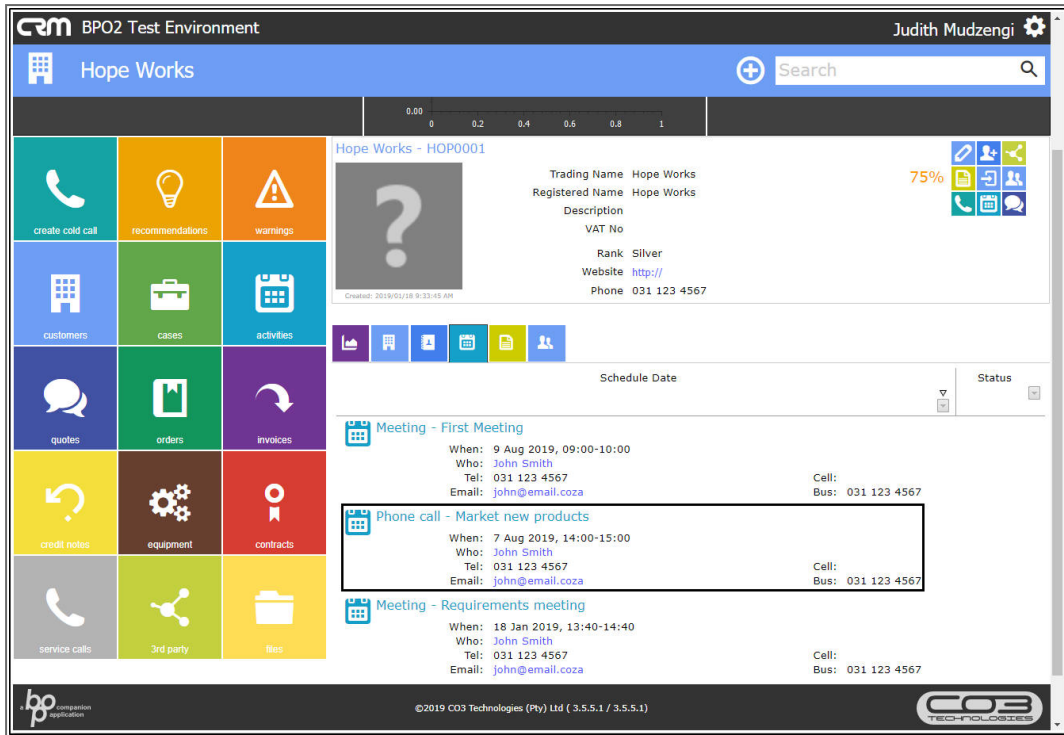2. Click on **Ok**.

- Only open activities that fall within the selected timeline will be displayed.

ACTION ITEMS

- Hover over an open activity.

- The following action items will be displayed:
    - Reschedule this Activity
    - View / Edit Activity
    - Close this Case
    - View Case Info and History
    - View Customer
    - Next Action (close current activity and create new activity)
    - Create new Quote

VIEW MORE DETAILS OF AN OPEN ACTIVITY

- Click on an open activity you wish to view more details for.

Customers Open Activities

- More details of the selected open activity will be displayed.

CRM.002.016

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