

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

CRM CUSTOMERS

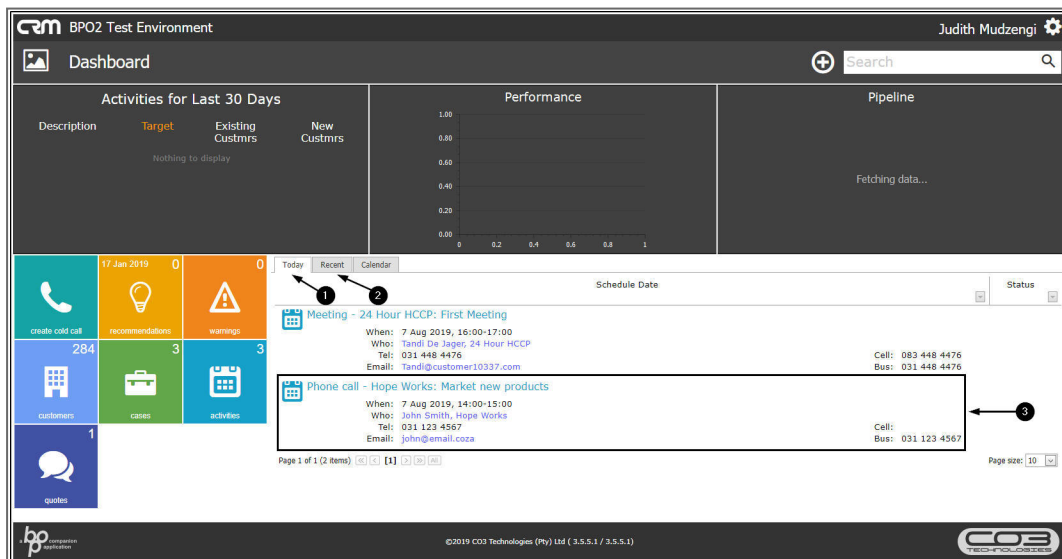
OPEN ACTIVITIES

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

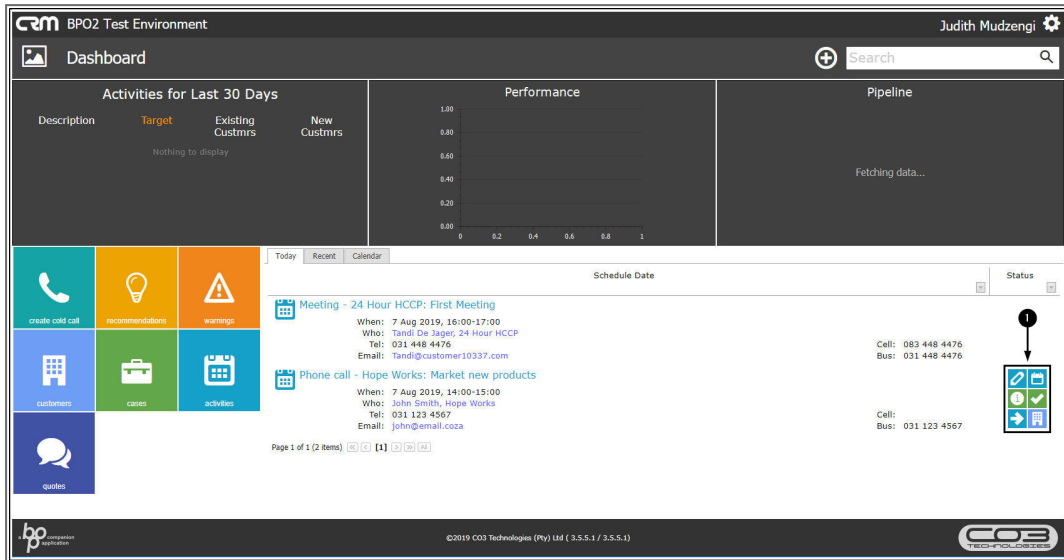
Ribbon Access: Webpage > [http://\[servername\]:\[port-no\]/BPOCRM/User.aspx](http://[servername]:[port-no]/BPOCRM/User.aspx)

OPEN ACTIVITIES

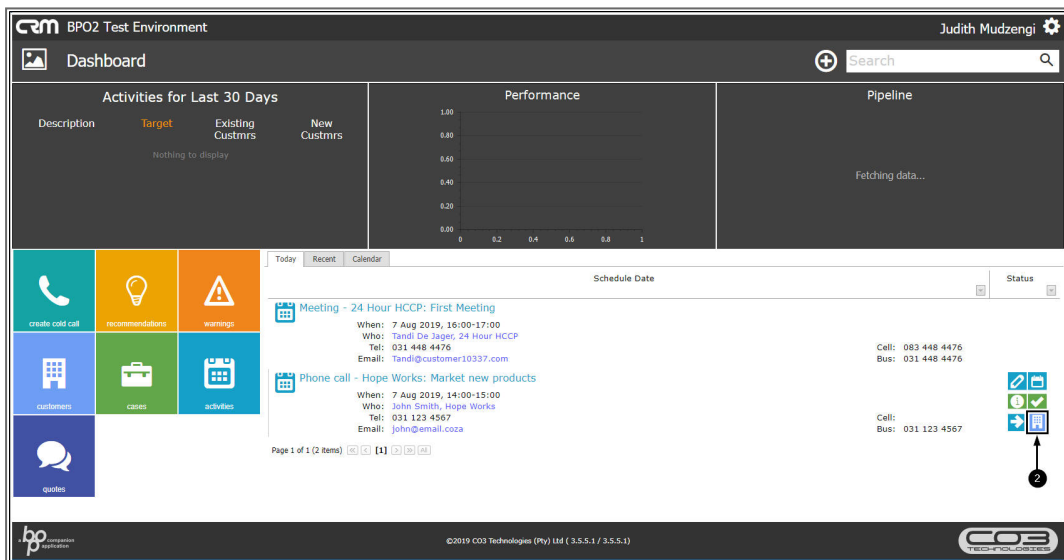
1. The **Today** tab will be selected by default displaying customer activities due on that day.
2. If you cannot find the information you are looking for within this tab, click on the **Recent** tab.
3. Hover over an activity linked to the customer you wish to view open activities for.



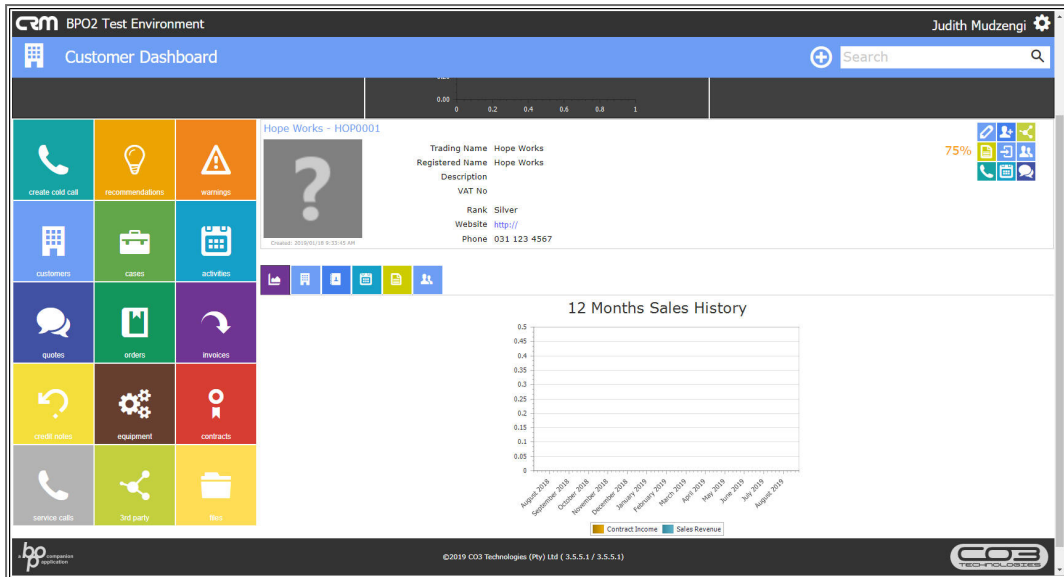
1. **Action icons** will be displayed to the right of the customer activity you are hovering over.



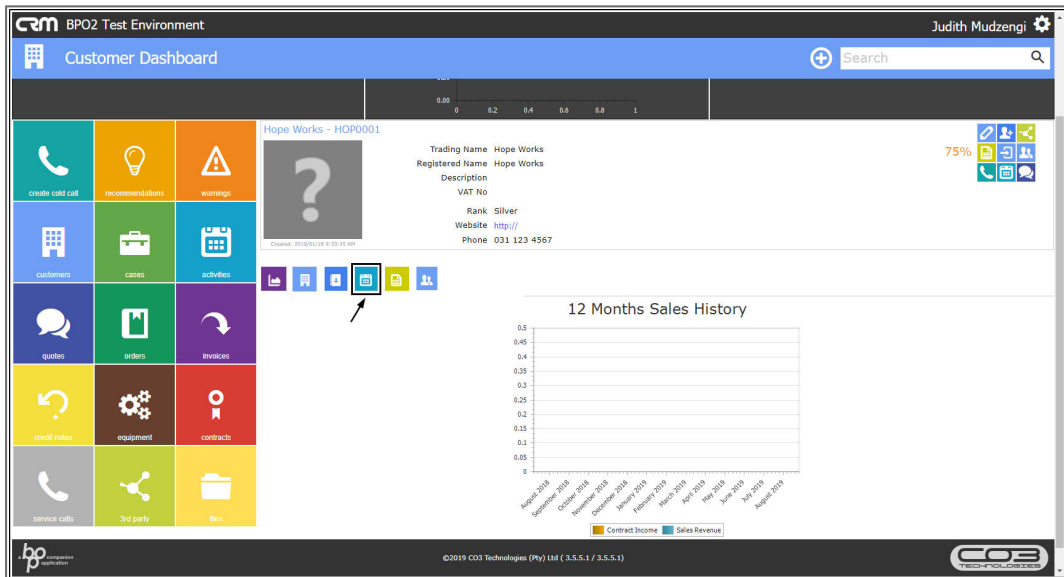
2. Click on the **View Customer** icon.



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



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



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

CRM BPO2 Test Environment Judith Mudzengi

Customer Dashboard Search

0.00 0 0.2 0.4 0.6 0.8 1

Hope Works - HOP0001 75%

Trading Name Hope Works
Registered Name Hope Works
Description
VAT No
Rank Silver
Website <http://>
Phone 031 123 4567

Created: 2019/01/18 9:33:05 AM

create cold call recommendations warnings
customers cases activities
quotes orders invoices
credit notes equipment contracts
service calls 3rd party files

Schedule Date	Status
Meeting - First Meeting	
When: 9 Aug 2019, 09:00-10:00 Who: John Smith Tel: 031 123 4567 Email: john@email.co.za	Cell: Bus: 031 123 4567
Phone call - Market new products	
When: 7 Aug 2019, 14:00-15:00 Who: John Smith Tel: 031 123 4567 Email: john@email.co.za	Cell: Bus: 031 123 4567
Meeting - Requirements meeting	
When: 18 Jan 2019, 13:40-14:40 Who: John Smith Tel: 031 123 4567 Email: john@email.co.za	Cell: Bus: 031 123 4567

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SORTING DATA

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

CRM BPO2 Test Environment Judith Mudzengi

Customer Dashboard Search

0.00 0 0.2 0.4 0.6 0.8 1

Hope Works - HOP0001 75%

Trading Name Hope Works
Registered Name Hope Works
Description
VAT No
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Website <http://>
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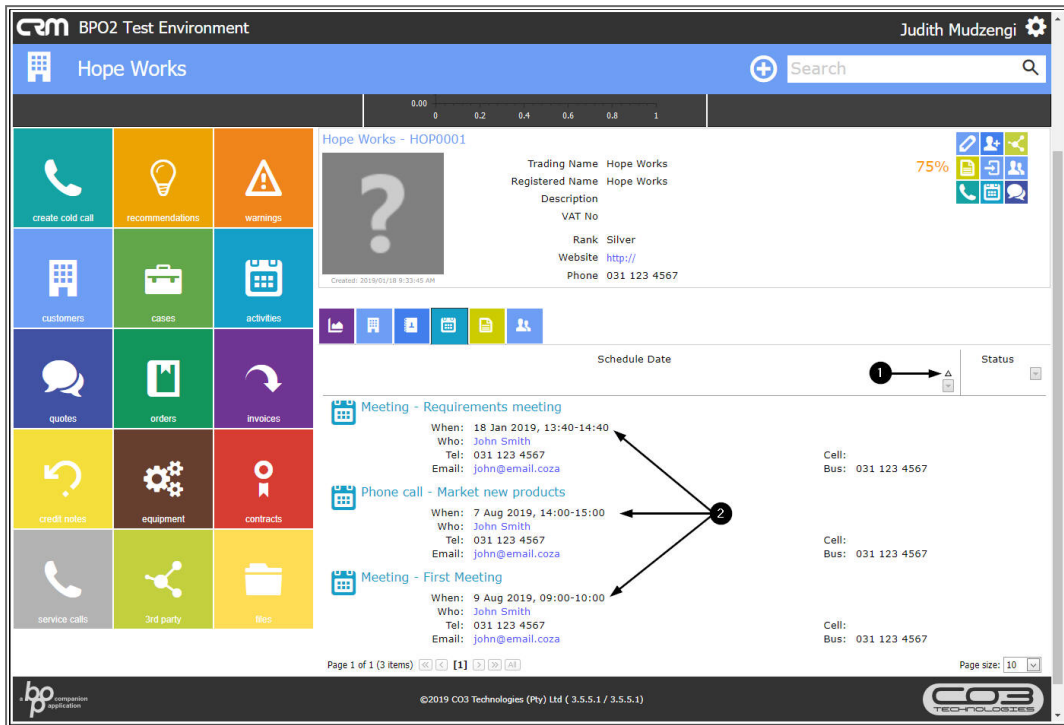
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Meeting - Requirements meeting	
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1. A **Sort** button will be revealed, pointing upwards and
2. all open activities will be sorted in **ascending** order - **earliest** date first.

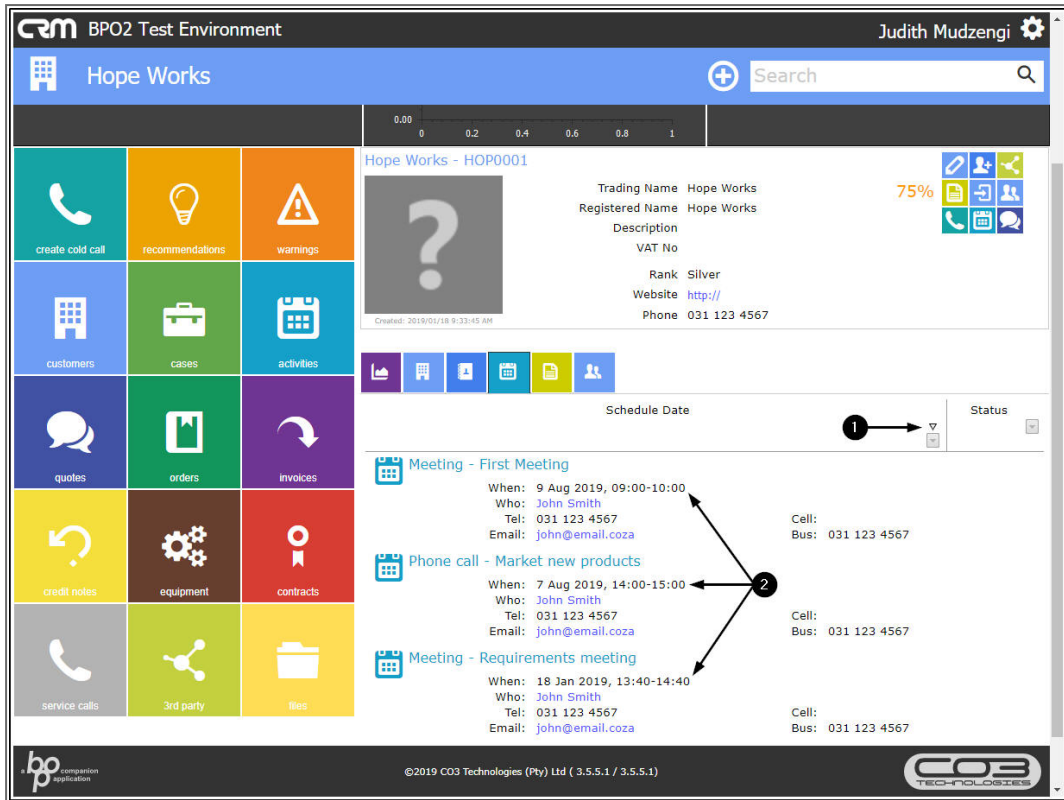


- To sort in descending order, click on the **Schedule Data** column header.

The screenshot shows a CRM interface for a customer named 'Hope Works'. The top navigation bar includes 'Hope Works' and a search field. A progress indicator shows 75% completion. The main content area displays customer details and a list of activities. The 'Sort' button in the activity list is pointing downwards, indicating a descending sort order.

Activity Name	When	Who	Tel	Email	Cell	Bus
Meeting - Requirements meeting	18 Jan 2019, 13:40-14:40	John Smith	031 123 4567	john@email.coza		031 123 4567
Phone call - Market new products	7 Aug 2019, 14:00-15:00	John Smith	031 123 4567	john@email.coza		031 123 4567
Meeting - First Meeting	9 Aug 2019, 09:00-10:00	John Smith	031 123 4567	john@email.coza		031 123 4567

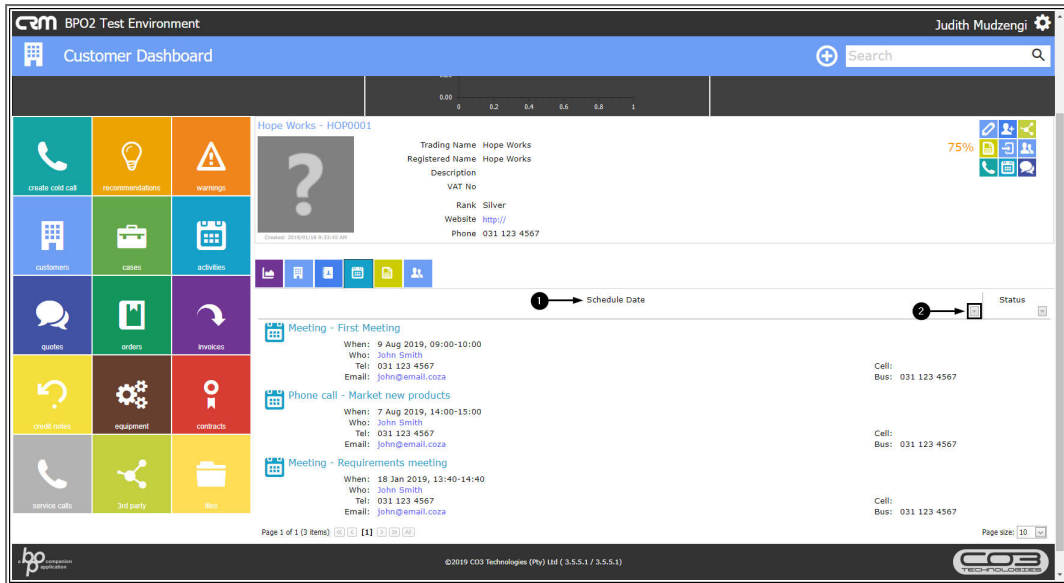
1. The **Sort** button will now be pointing downwards and
2. all open activities will be sorted in **descending** order - **latest** date first.



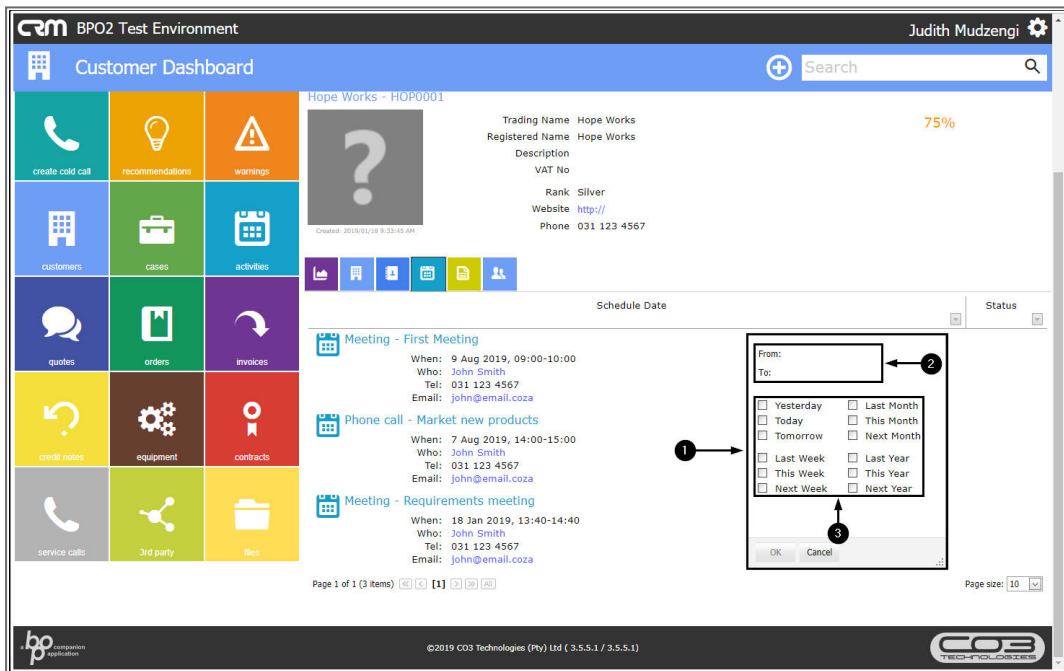
FILTER OPEN ACTIVITIES BY SCHEDULE DATE

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

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

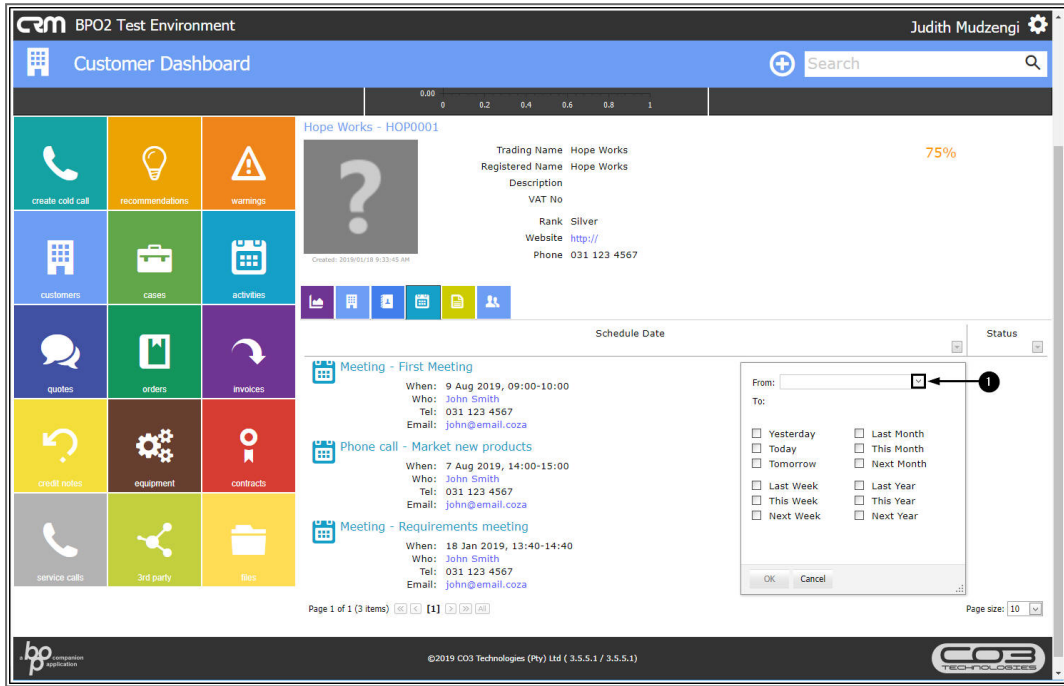


1. A **menu** will be displayed.
2. You can either filter by **Date Range** or
3. **Timeline**.

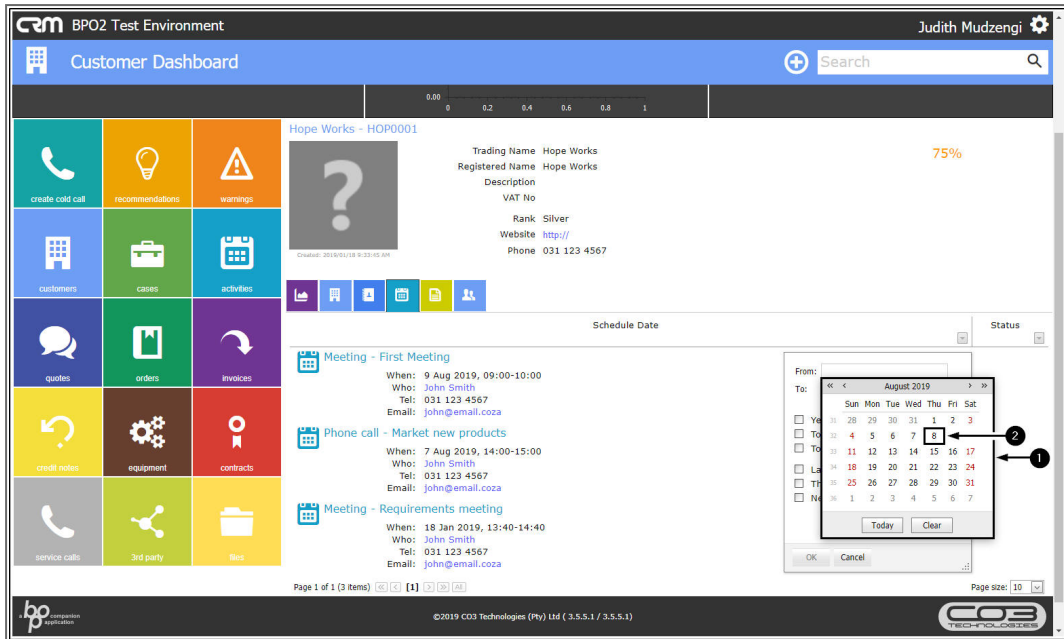


FILTER BY DATE RANGE

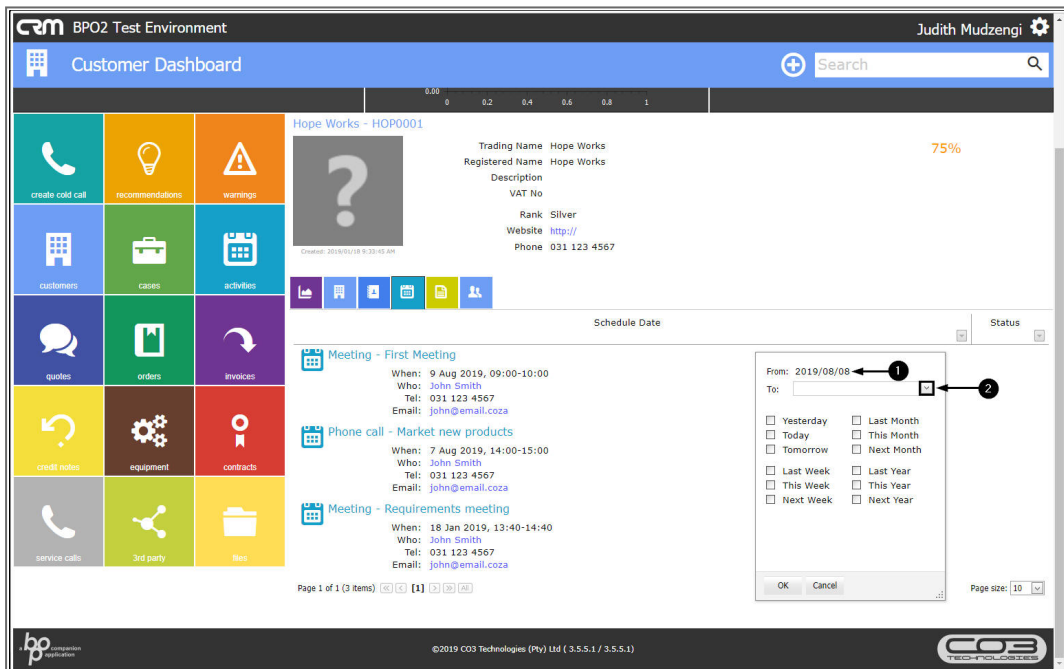
1. Hover over the **From** field, a **down arrow** will be displayed.
1. Click on the **down arrow**.



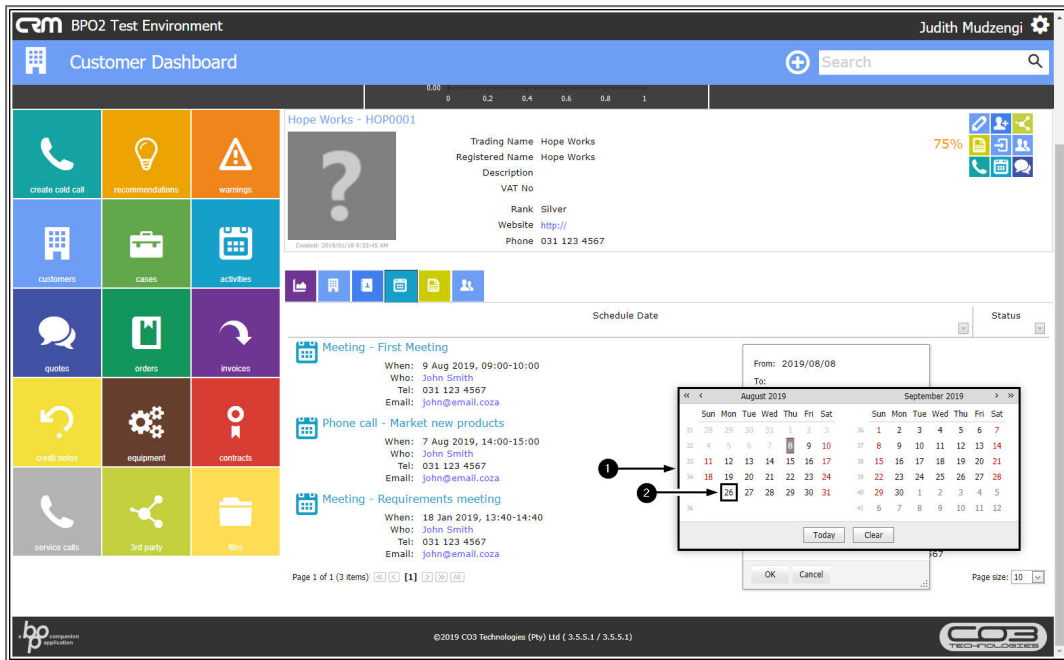
1. A **calender** will be displayed.
2. Select the relevant date.



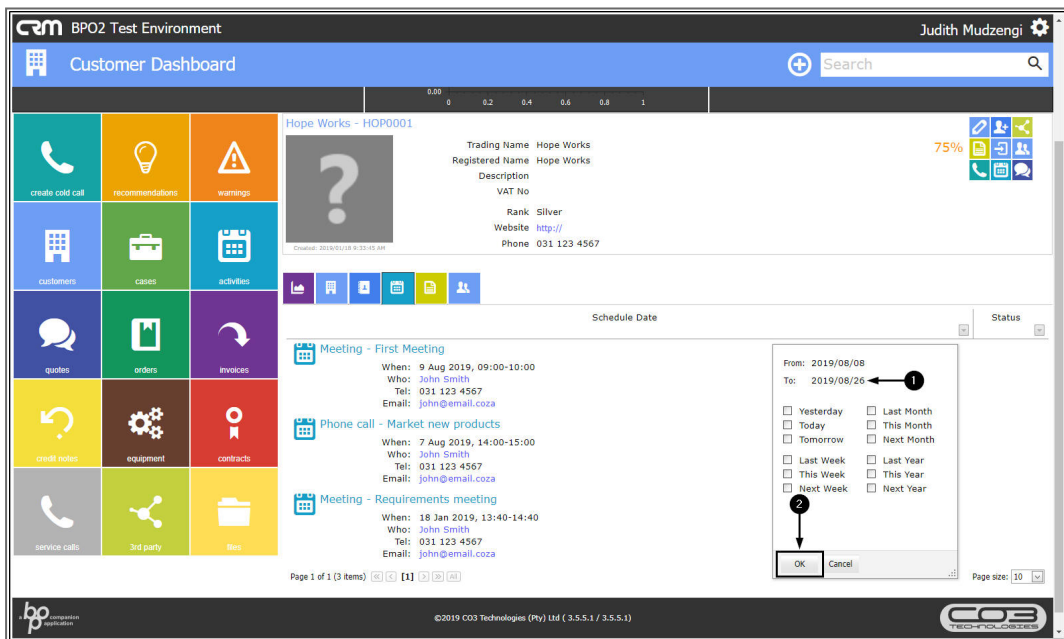
1. The **From** field will be populated with the selected date.
2. Hover over the **To** field, a **down arrow** will be displayed.
3. Click on the **down arrow**.



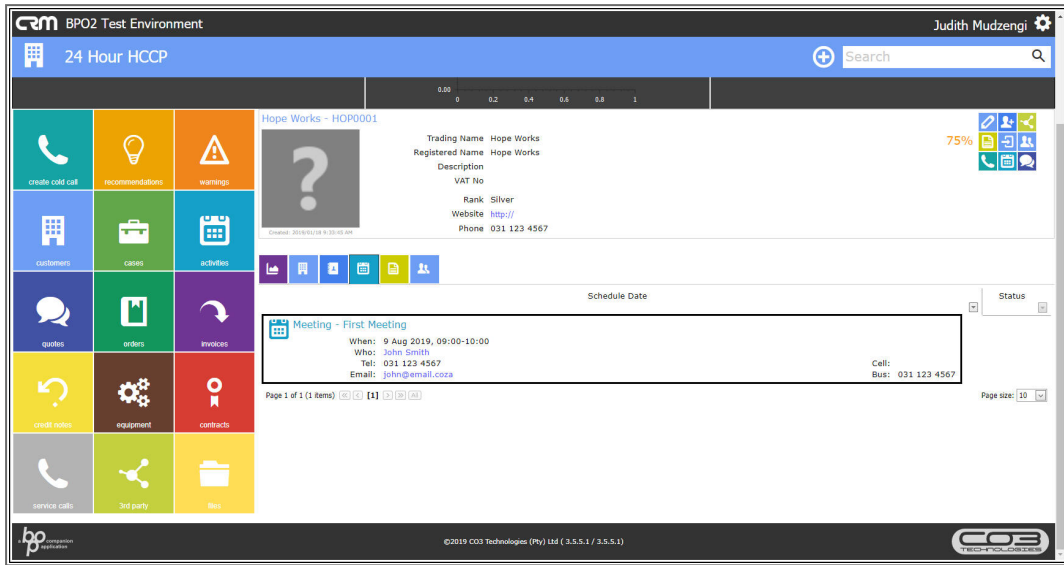
1. A **calender** will be displayed.
2. Select the relevant date.



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

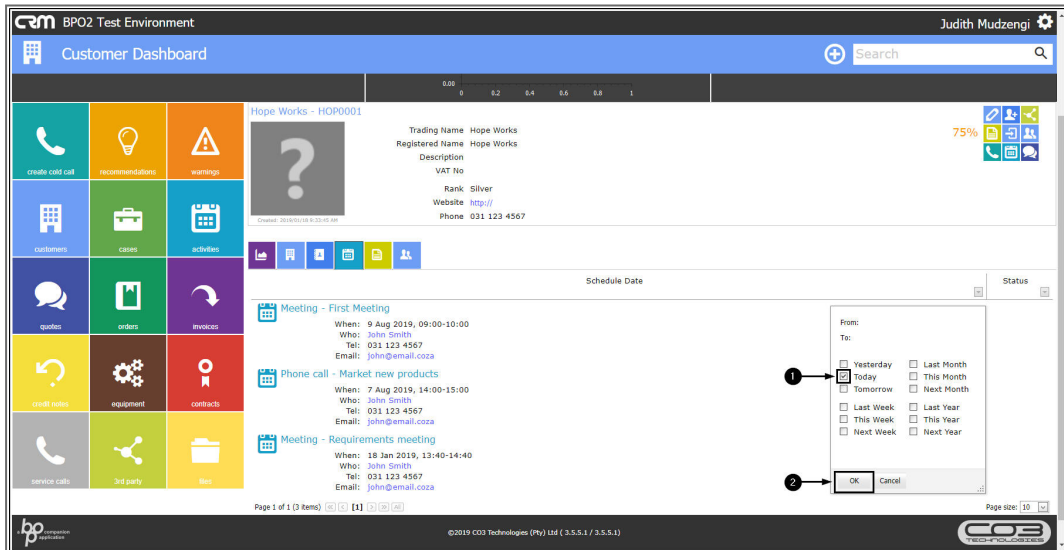


- Only open activities that fall within the selected date range will be displayed.

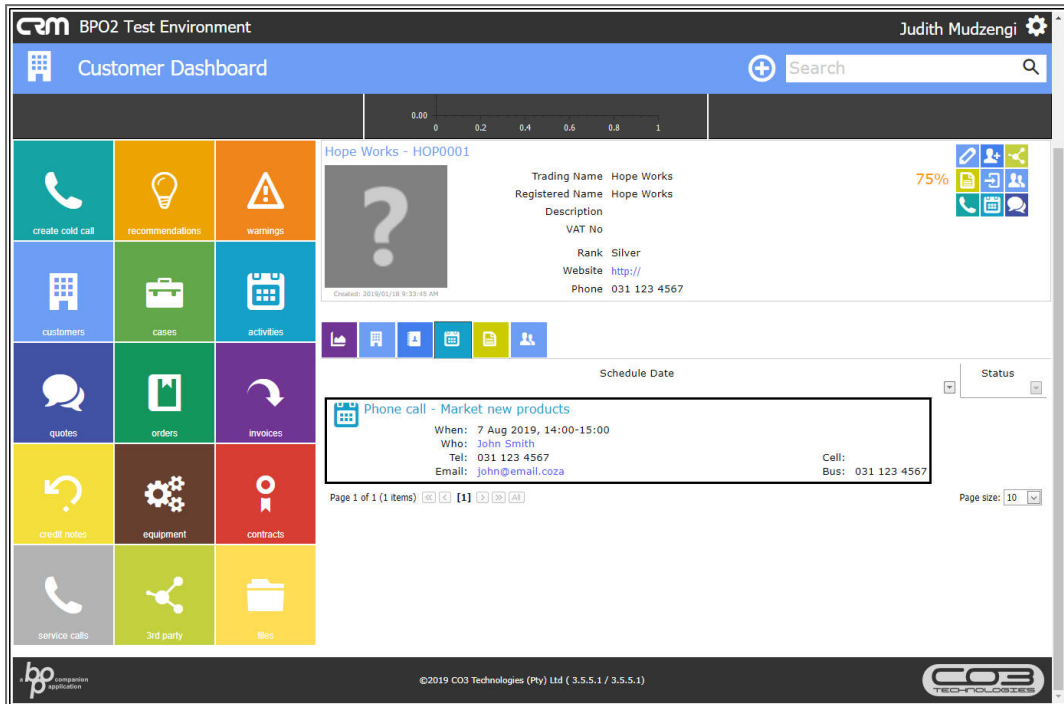


FILTER BY TIMELINE

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

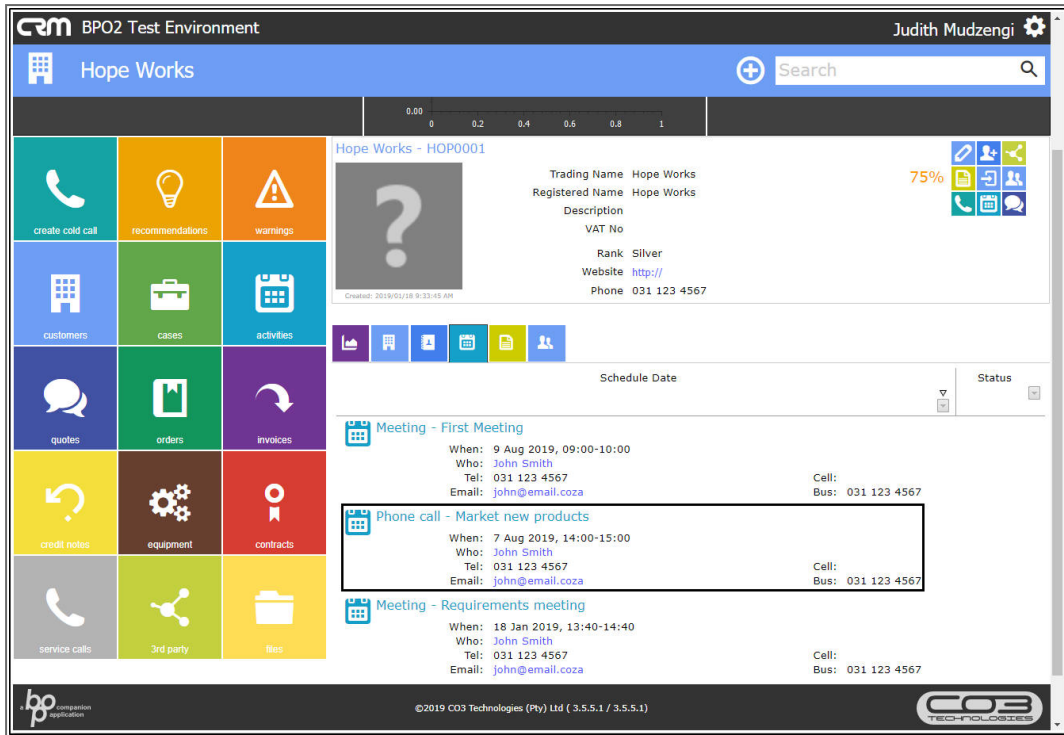


- Only open activities that fall within the selected timeline will be displayed.



ACTION ITEMS

- Hover over an open activity.



The screenshot displays a CRM interface for a customer named 'Hope Works'. The interface includes a navigation menu on the left with icons for 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The main content area shows the customer's details, including a progress bar at 75%, and a list of activities:

- Meeting - First Meeting**
When: 9 Aug 2019, 09:00-10:00
Who: John Smith
Tel: 031 123 4567
Email: john@email.coza
Cell: 031 123 4567
- Phone call - Market new products**
When: 7 Aug 2019, 14:00-15:00
Who: John Smith
Tel: 031 123 4567
Email: john@email.coza
Cell: 031 123 4567
- Meeting - Requirements meeting**
When: 18 Jan 2019, 13:40-14:40
Who: John Smith
Tel: 031 123 4567
Email: john@email.coza
Cell: 031 123 4567

- 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

The screenshot displays the CRM interface for a customer named 'Hope Works'. The top navigation bar includes the user name 'Judith Mudzengi' and a search bar. A sidebar on the left contains various activity icons such as 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The main content area shows the customer's profile with details like 'Trading Name: Hope Works', 'Registered Name: Hope Works', 'Rank: Silver', and 'Phone: 031 123 4567'. Below this, a list of activities is shown, including 'Meeting - First Meeting' (Aug 9, 2019), 'Phone call - Market new products' (Aug 7, 2019), and 'Meeting - Requirements meeting' (Jan 18, 2019). An arrow points to a 'More Details' icon for the 'Phone call' activity.

VIEW MORE DETAILS OF AN OPEN ACTIVITY

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

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

CRM.002.016