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

CRM BASICS

ACTIVITIES

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

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

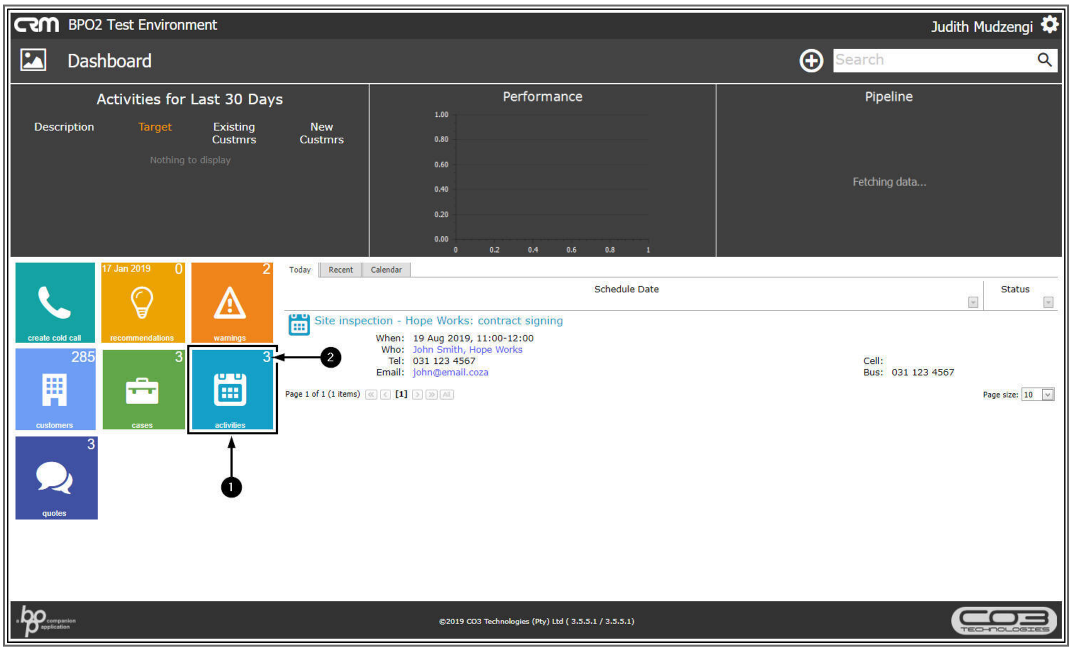
Client specific activities can be accessed from Customer Homepage.

A full list of all customers activities can be accessed from the **Homepage** as set out below.

Access: Webpage > http://[servername]:[portno]/BPOCRM/User.aspx

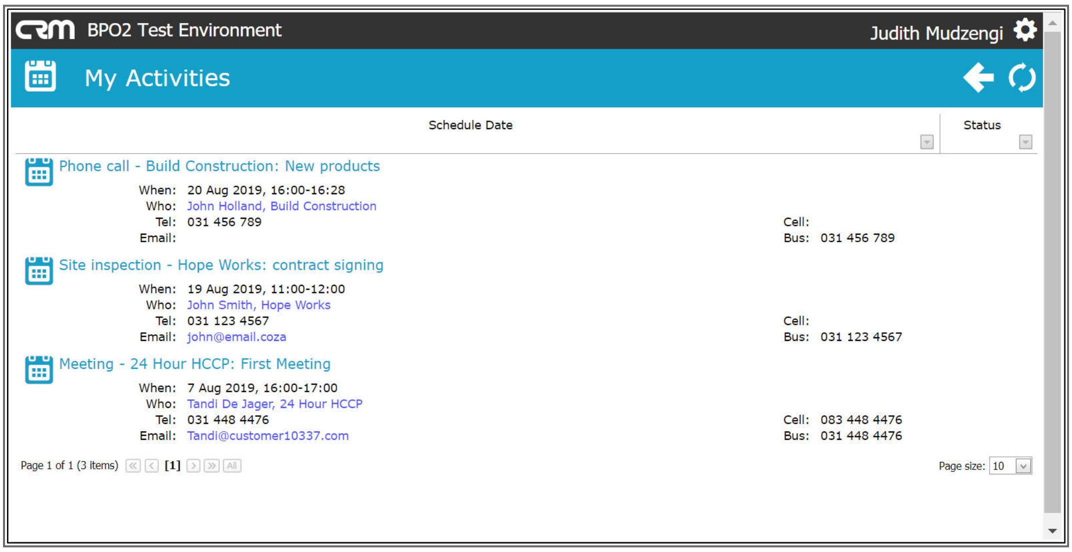
CUSTOMERS ACTIVITIES FROM THE HOMEPAGE

1. Click on the **Activities** tile in the **Homepage**.
2. The **number** in the top right of this tile shows you the amount of open activities.

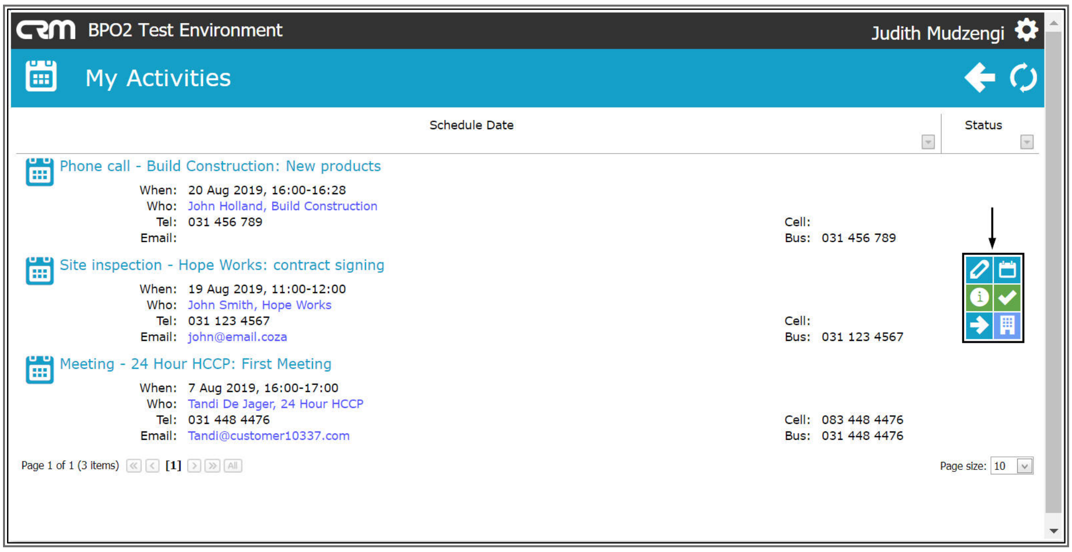


MY ACTIVITIES PAGE

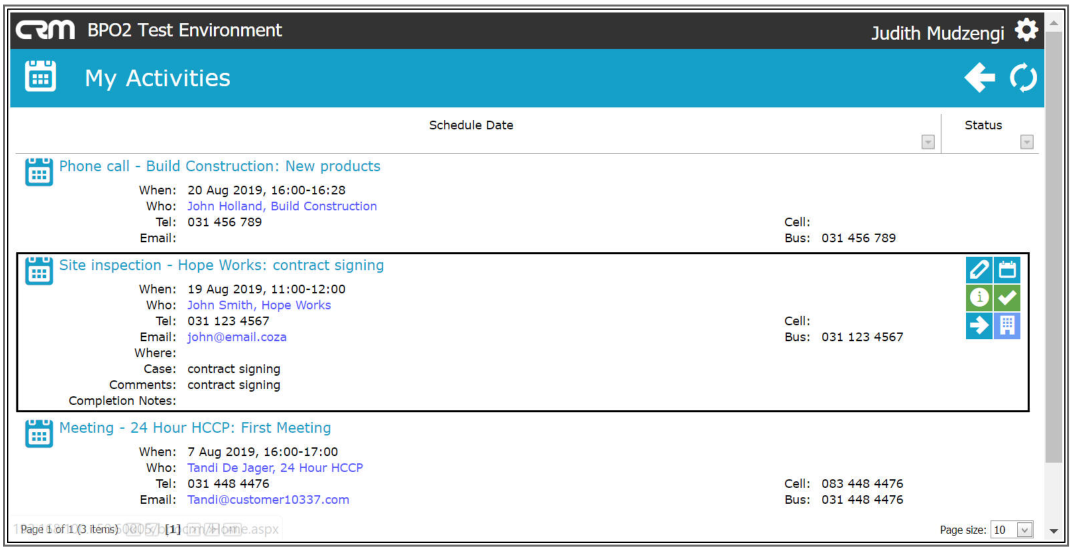
- **My Activities** page will be open.
- A list of activities will be displayed (where you have open activities).



- **Action** buttons are available by hovering over an **Activity**, and the options are:
    - 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)

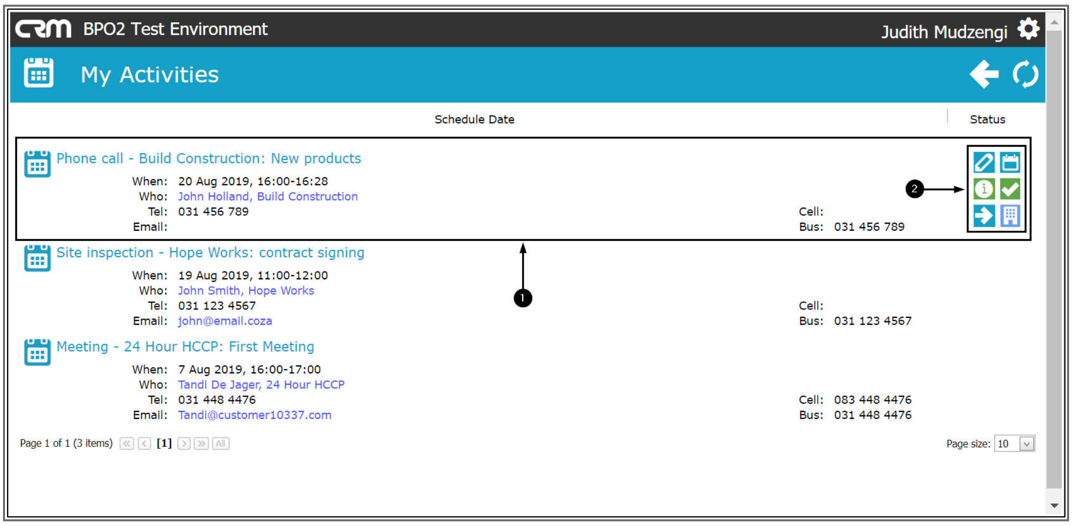


- Click on an **Activity** to access a quick view summary of the activity information.



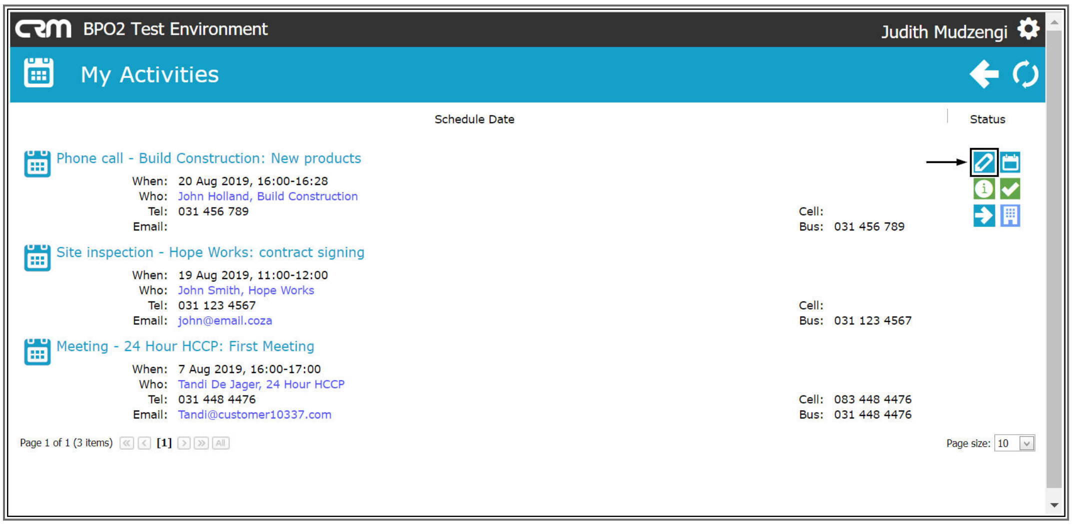
ACTION BUTTONS

1. Hover over an activity.
2. **Action** buttons will be displayed.



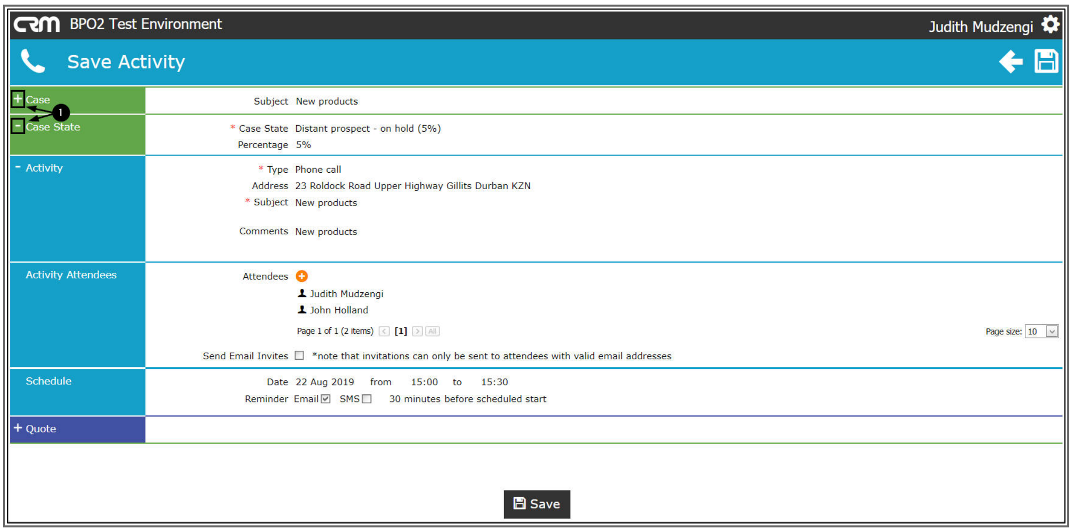
VIEW / EDIT ACTIVITY

- Click on the **View / Edit this Activity** icon.



Save Activity

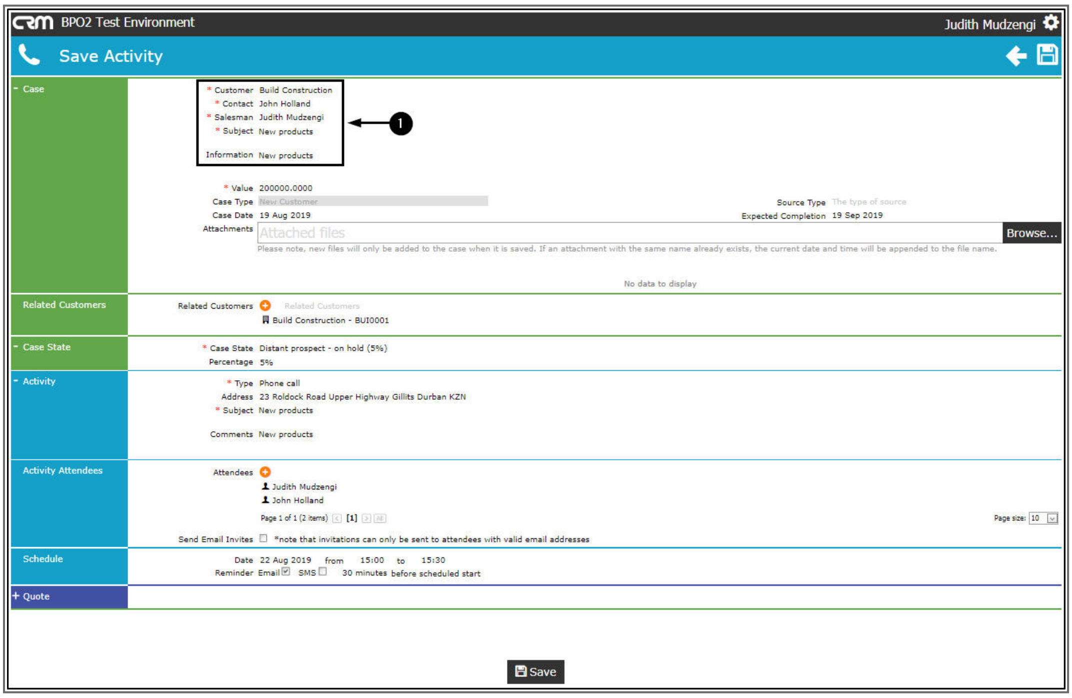
- The **Save Activity** screen will be displayed.
  1. Click on the ' **+** ' sign to view more details or the **-** ' sign to view less details.



1. ## CASE DETAILS

- **Customer** : The customer will auto populate. This field cannot be edited.

- **Contact** : The contact will auto populate. Click in this field to display a list of all the contacts linked to the selected customer. Select the relevant contact if applicable.
- **Salesman** : The salesman will auto populate. This field cannot be edited.
- **Subject** : Delete and type in the relevant subject if applicable.
- **Information** : Delete and type in the relevant information if applicable.



1. **Case Details Continue**
   - **Value** : Type in or edit the estimated value if required.
   - **Case Type** : The case type will auto populate. This field cannot be edited.
   - **Case Date** : Click on the drop-down arrow and select the required date from the calender if applicable.

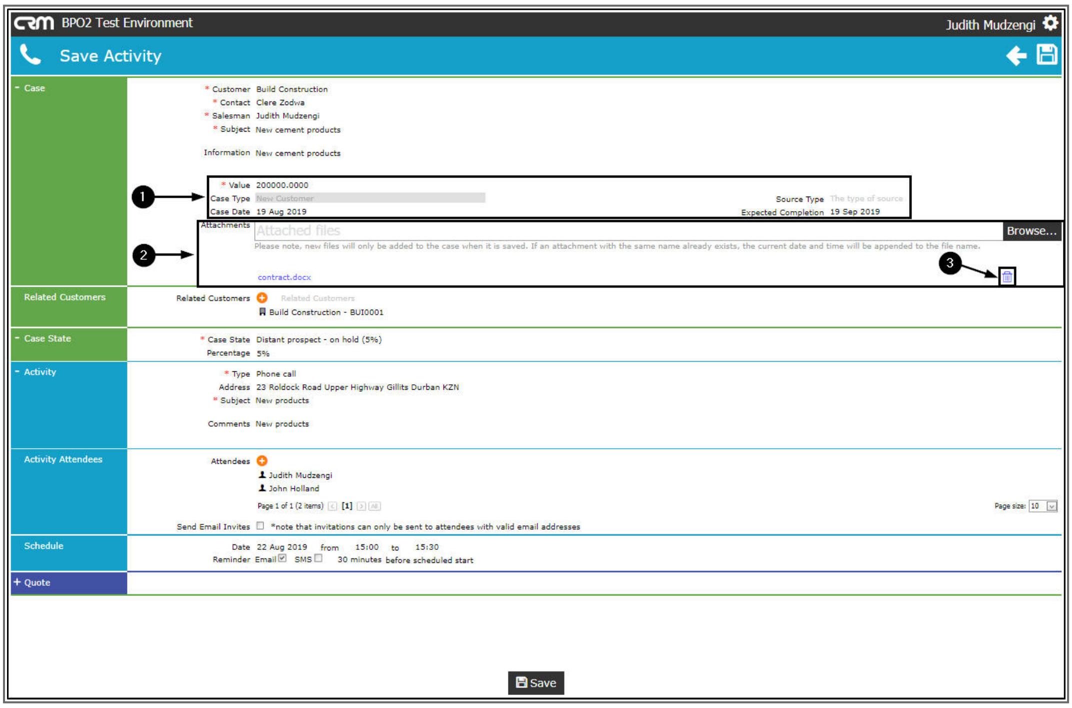
- **Source Type** : Click in this field to display a list of all source types and select the required source type if applicable.
- **Expected Completion** : Click on the drop-down arrow and select the required date if applicable.

2.

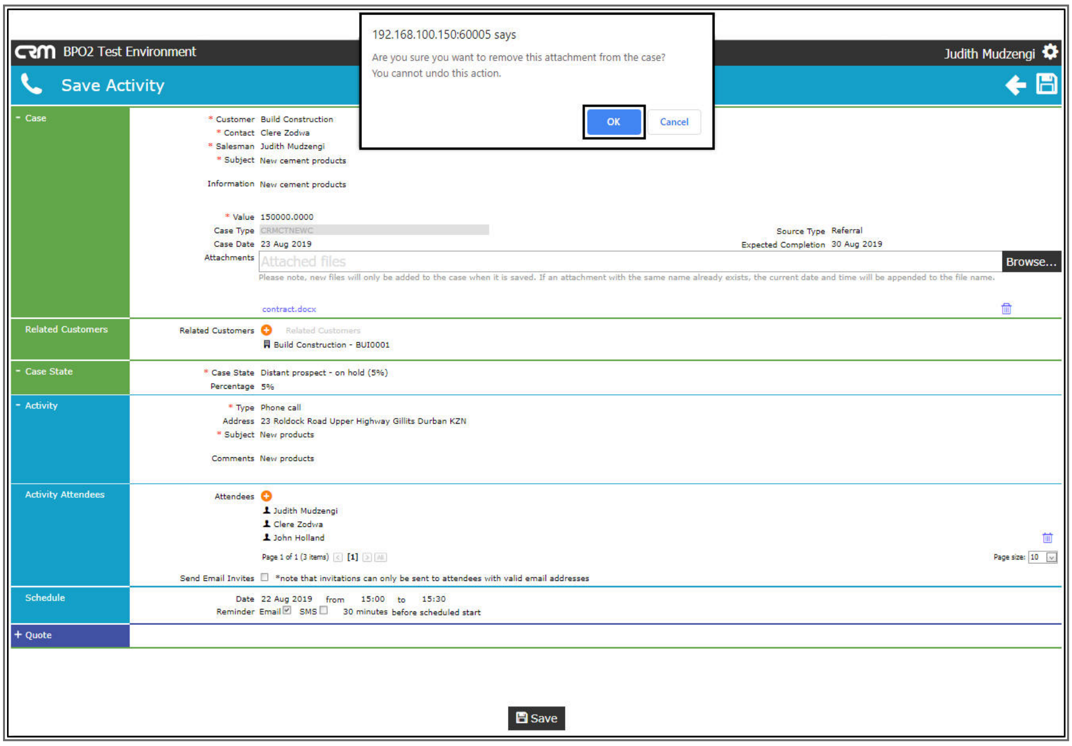
- **Attachments** : You can add (hyperlink needed 000.014) an attachment if applicable.0

3.

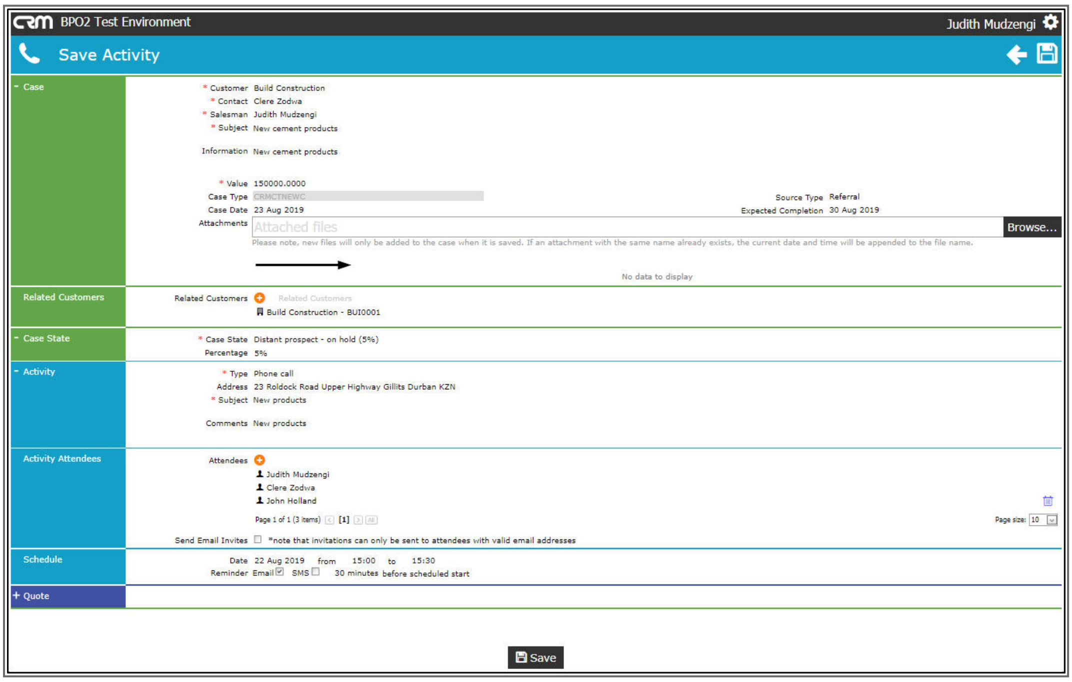
- **Attachments** : You can also delete an attachment by clicking on the **Delete** icon if applicable.



- A message box will pop up asking you;
  - **Are you sure you want to remove the attachment from the case? You cannot undo this action.**
- Click on **Ok** .



- The attachment will be removed from the **Case** section.

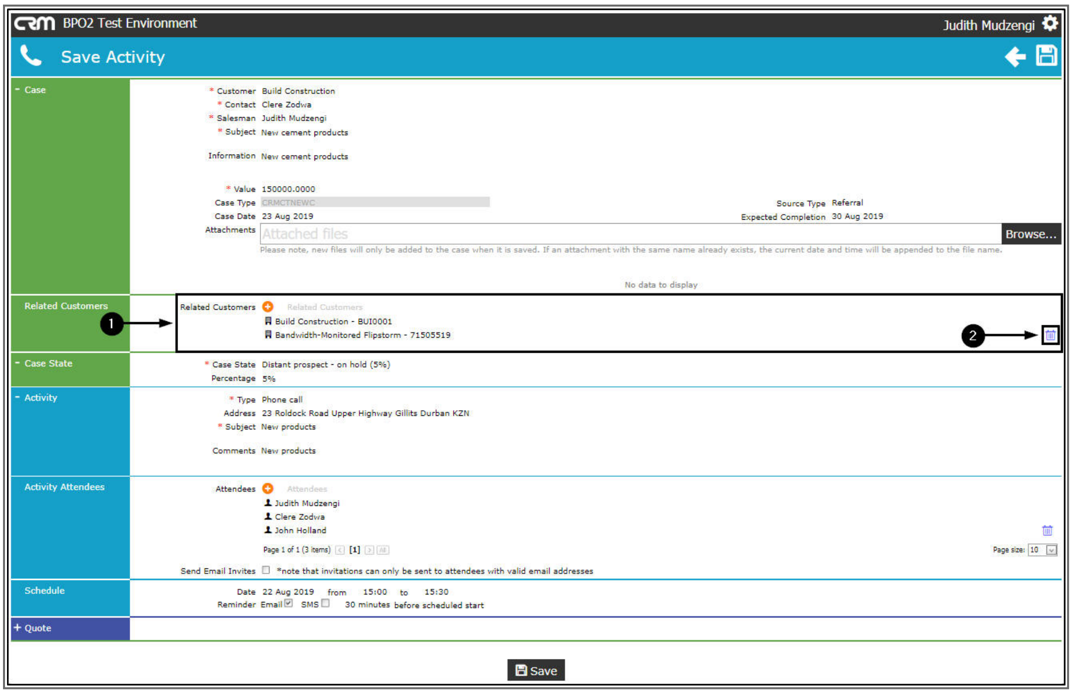


1.

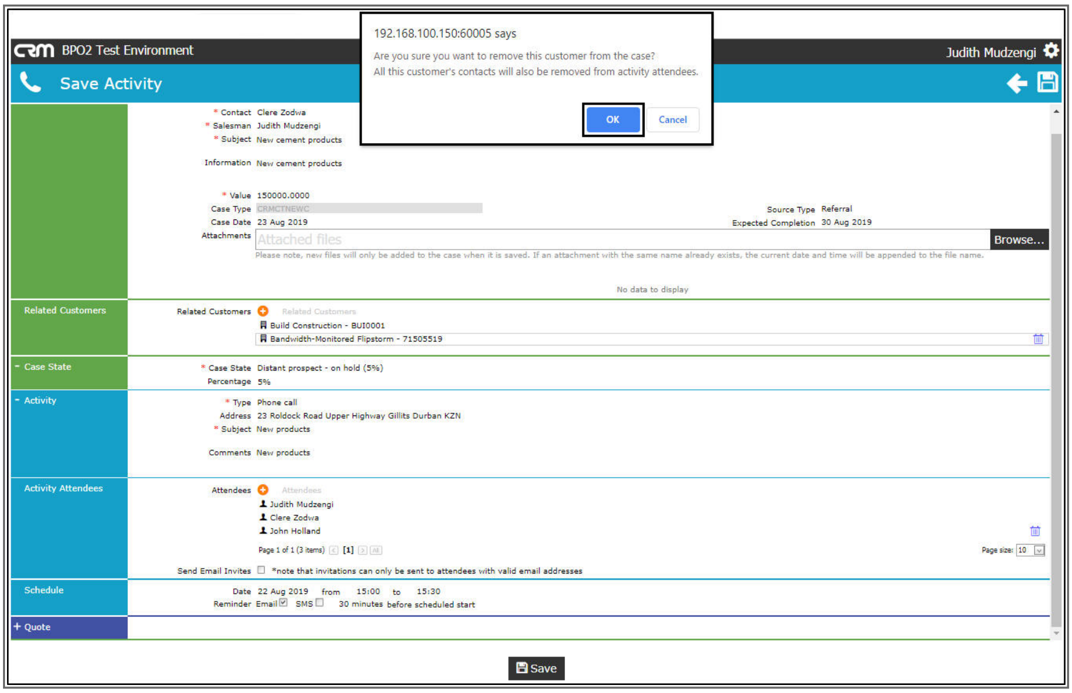
- **Related Customers** : You can add related customers if applicable. (hyperlink needed 000.014)

2.

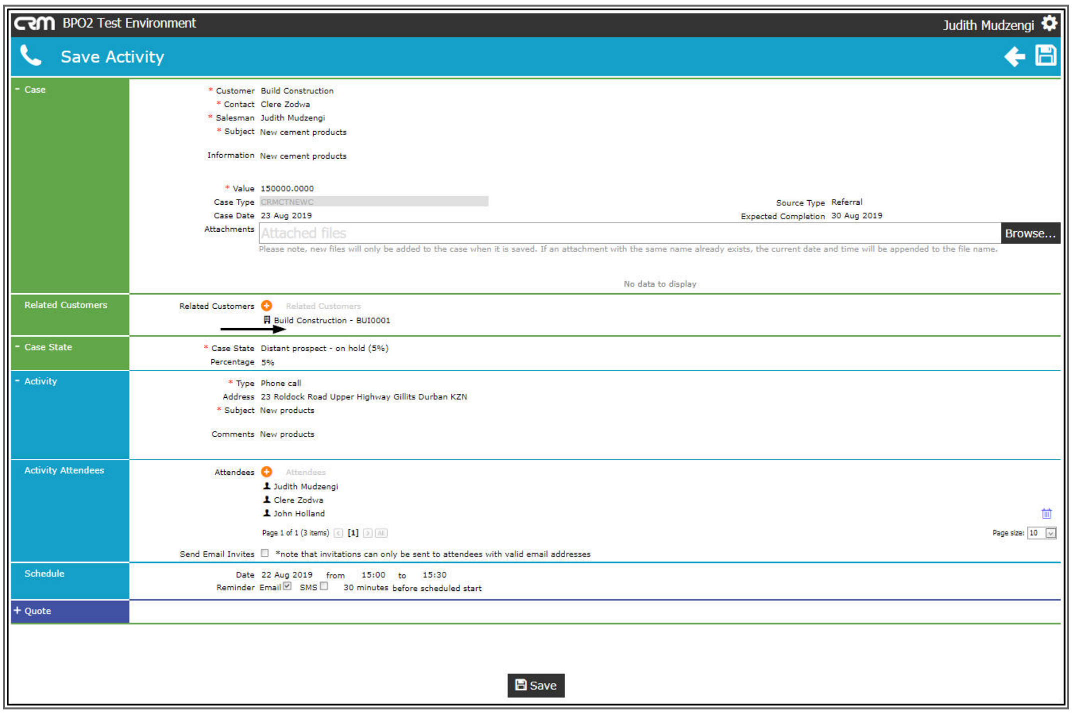
- **Related Customers** : You can delete a related customer if applicable by clicking on the **Delete** icon.



- A message box will pop up asking you;
  - **Are you sure you want to remove this customer from the case? All this customer's contacts will also be removed from activity attendees.**
- Click on **Ok** .

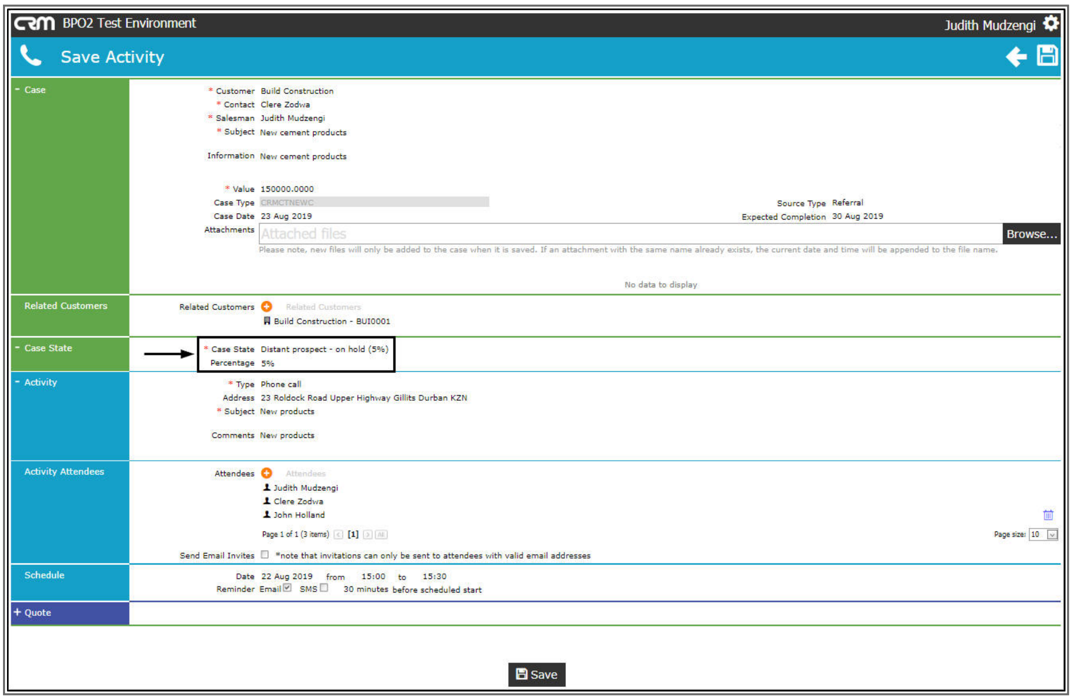


- The customer will be removed from the **Related Customers** section.



Case State Details

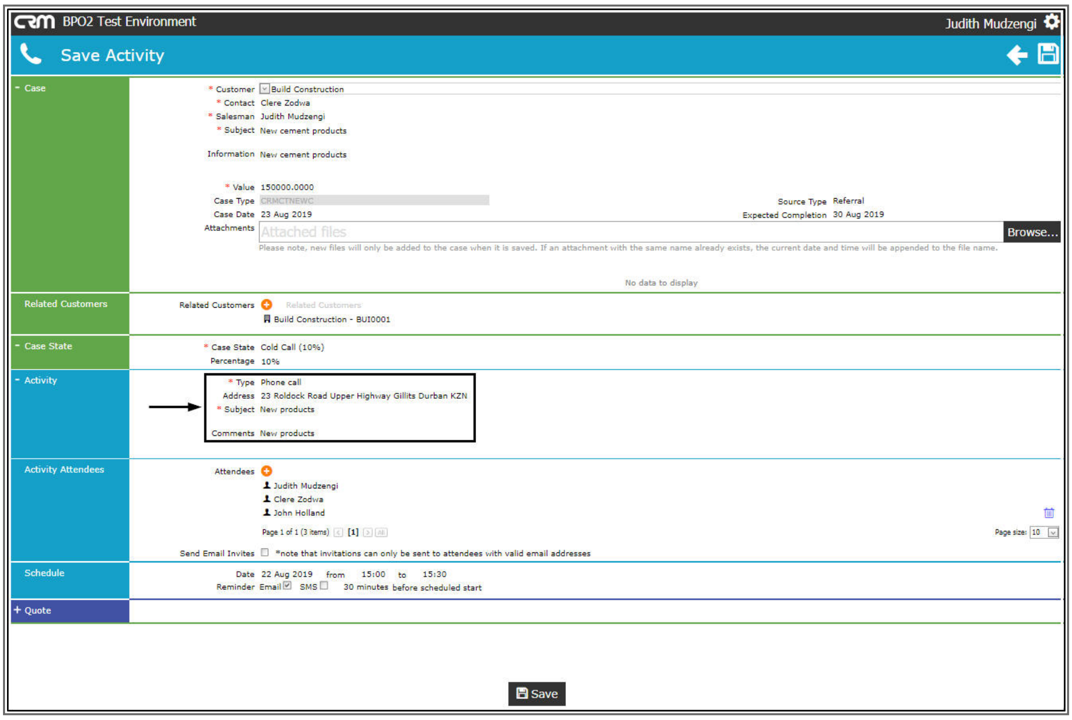
- **Case State** : Click in this field to display a list of all the Case States Descriptions and their Percentages on the system. Select the relevant description if applic- able.
- **Percentage** : This field will populate according to the Case State selected.



Activity Details

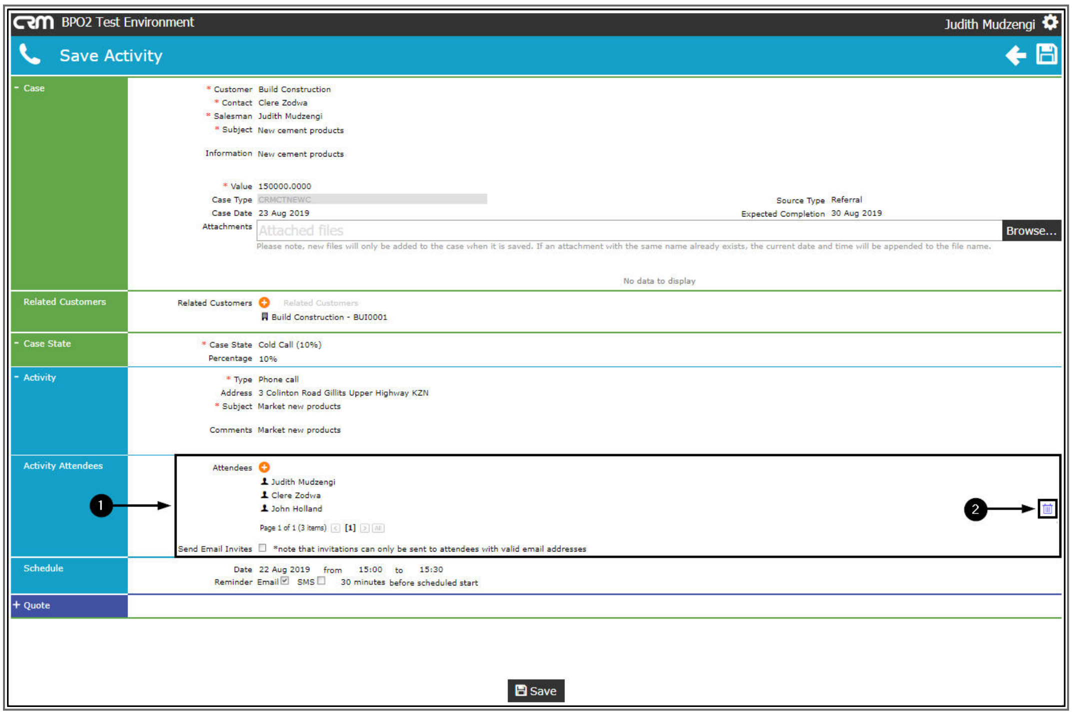
- **Type** : The type will auto populate. This field cannot be edited.
- **Address** : Click in the Address field, a list of all addresses linked to the customer will be displayed. Select the relevant address from this list if applicable.

- **Subject** : Edit the subject if applicable.
- **Comments** : Edit the comments if applicable.

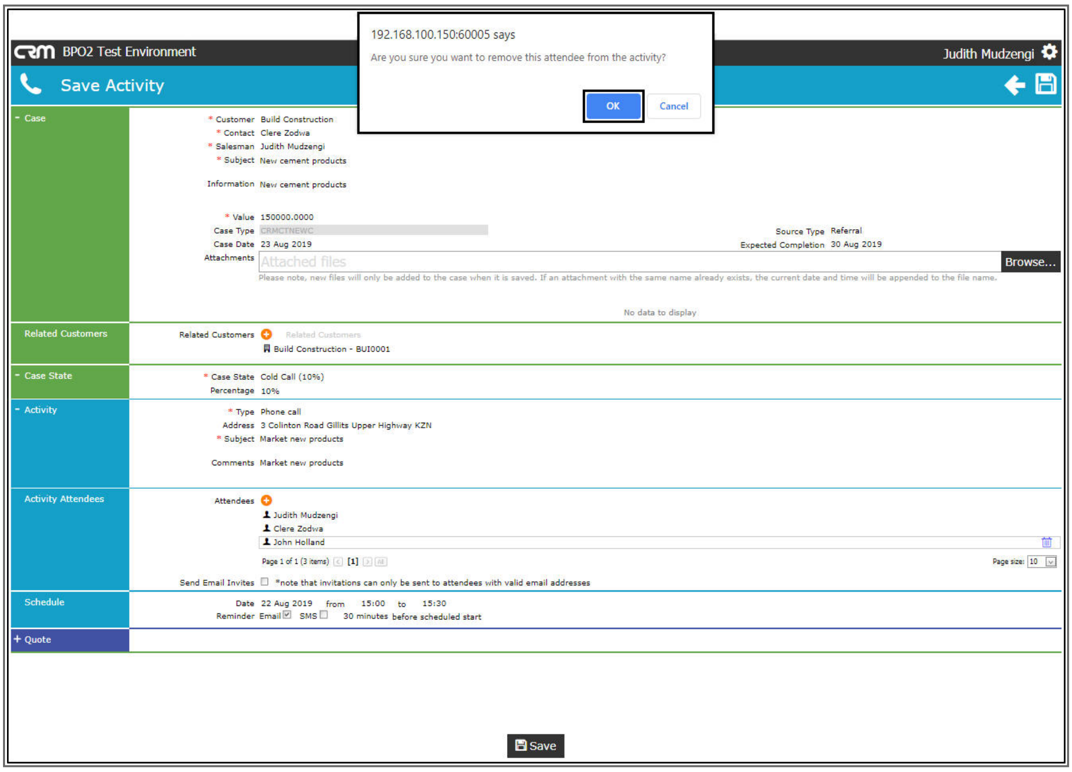


Activity Attendees

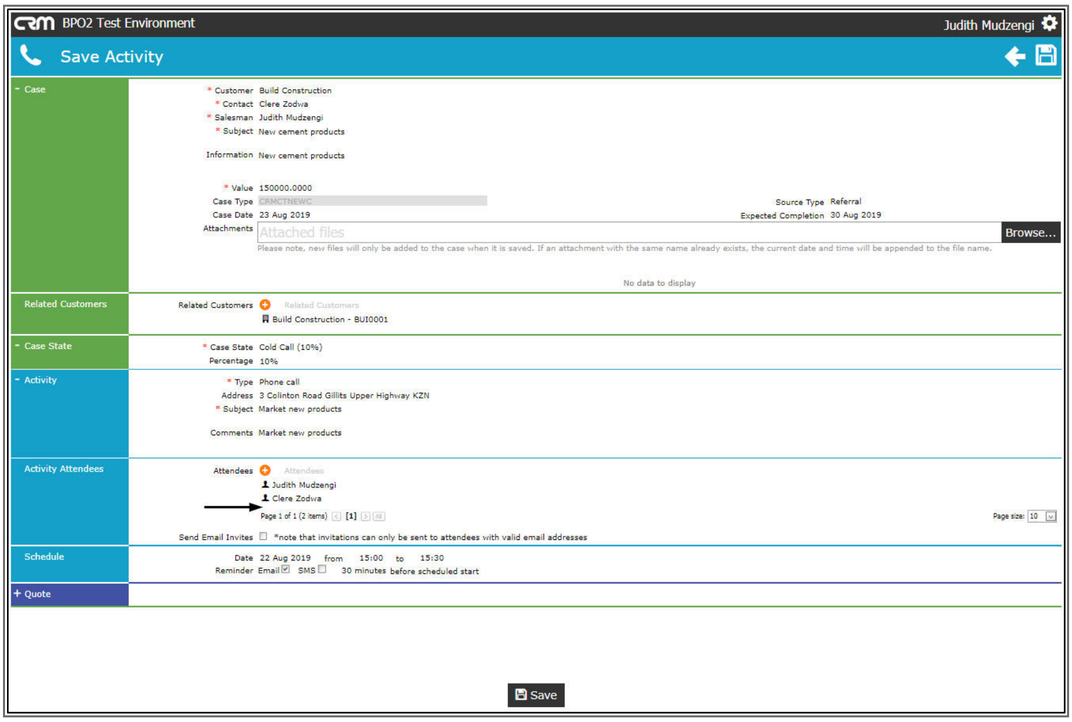
1. **Attendees** : You can link additional attendees if applicable. (hyperlink needed 000.014)
2. **Send Email Invites** : Tick the checkbox if you wish to send email invites. Untick the checkbox if you do not wish to send email invites.
3. **Attendees** : You can delete an additional attendee (one who is not the case salesman or case customer contact) if applicable by clicking on the **Delete** icon.



- A message box will pop up asking you;
    - **Are you sure you want to remove this attendee from the activity?**
- Click on **Ok** .

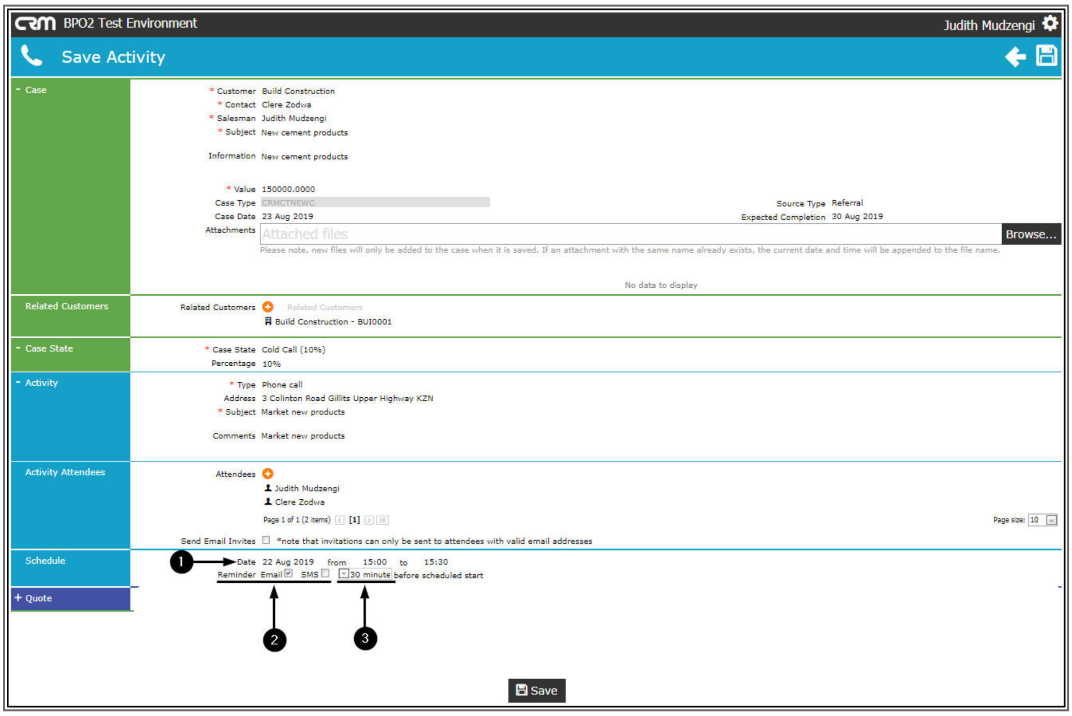


- The attendee will be removed from the **Activity Attendee** section.



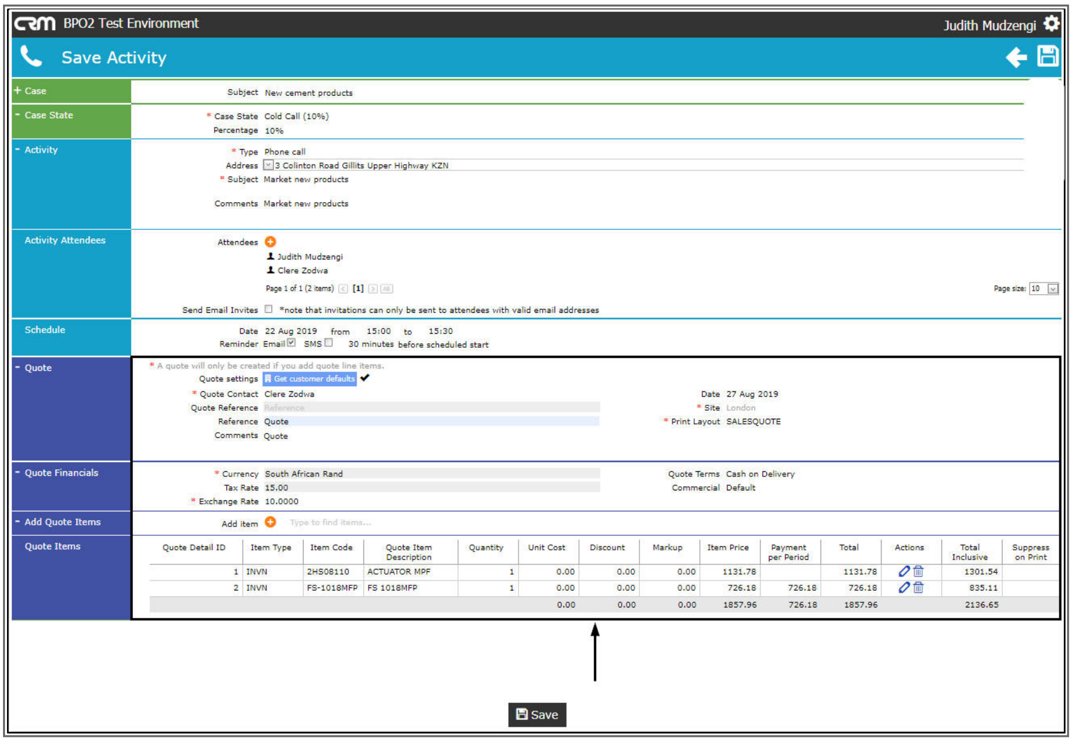
Scheduling

1. **Date** : You can change the scheduled date and or the time if applicable.
2. **Reminder** : Select either Email or SMS by ticking the relevant check box if applicable.
3. **Reminder (Time Period)** : Hover over the field, a **down arrow** will be displayed. Click on the **down arrow** and select the relevant time period from the **drop-down menu** if applicable.



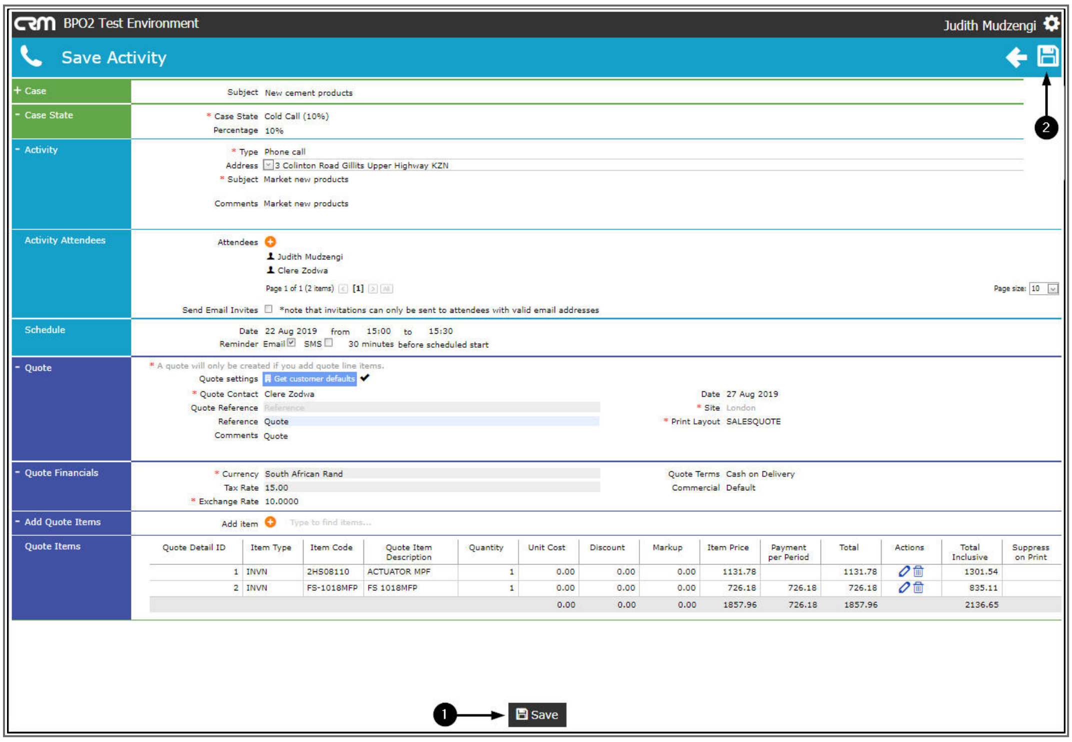
Quote Details

- You can edit quote details if applicable.

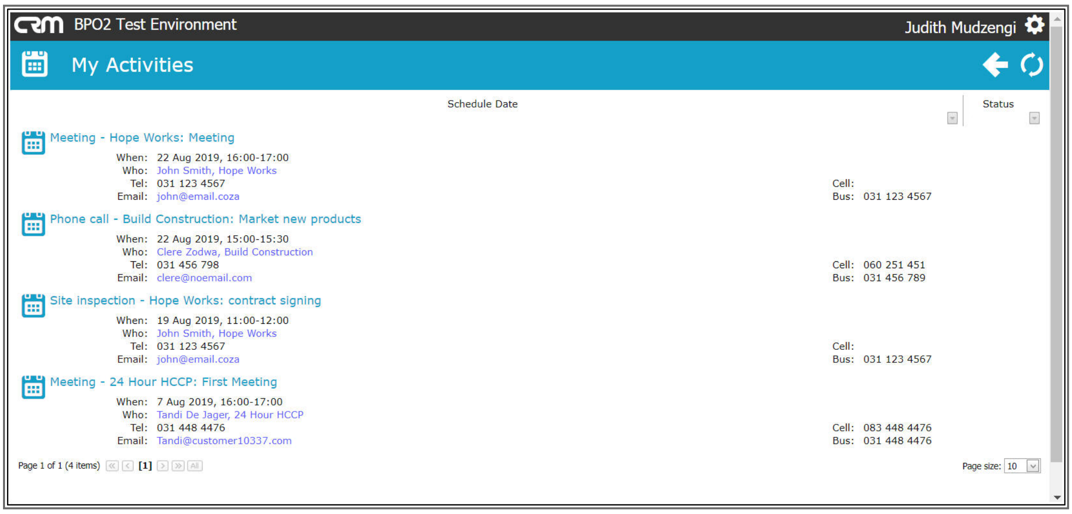


Save Changes

1. Click on either the **Save** button or
2. **Save** icon.

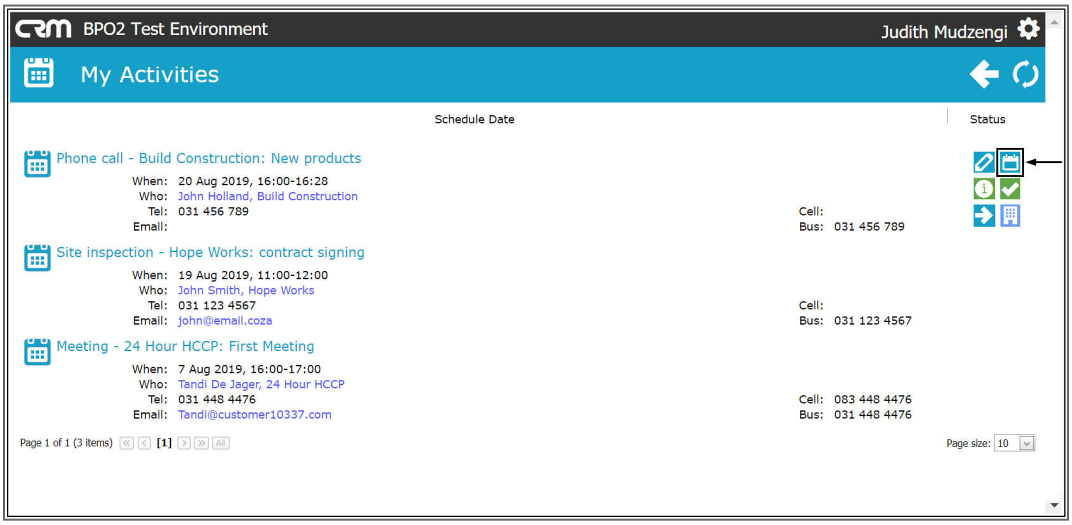


- You will return to the **My Activities** screen.

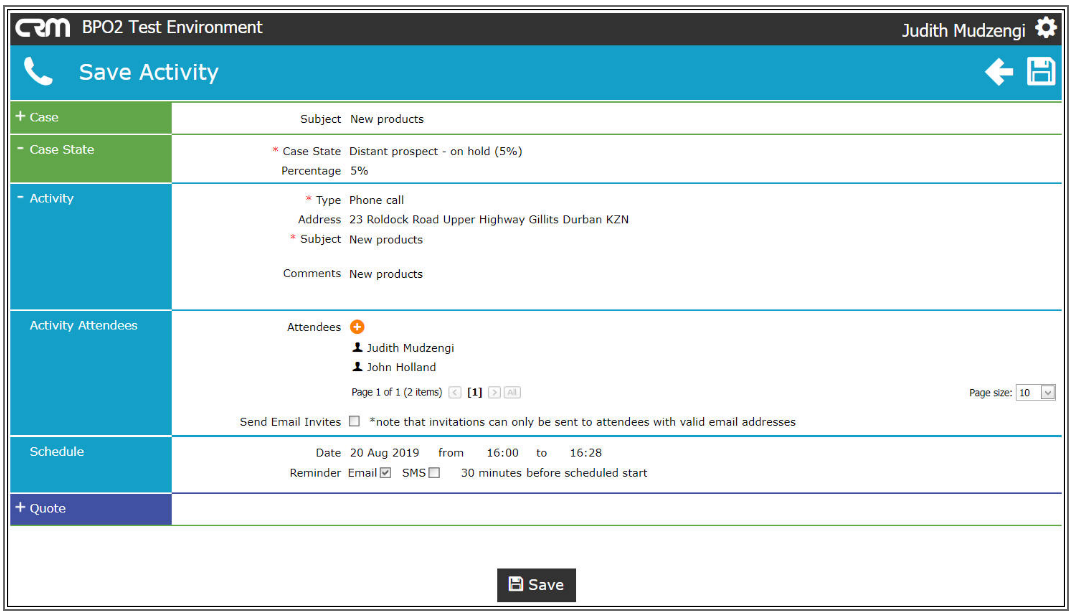


RESCHEDULE AN ACTIVITY

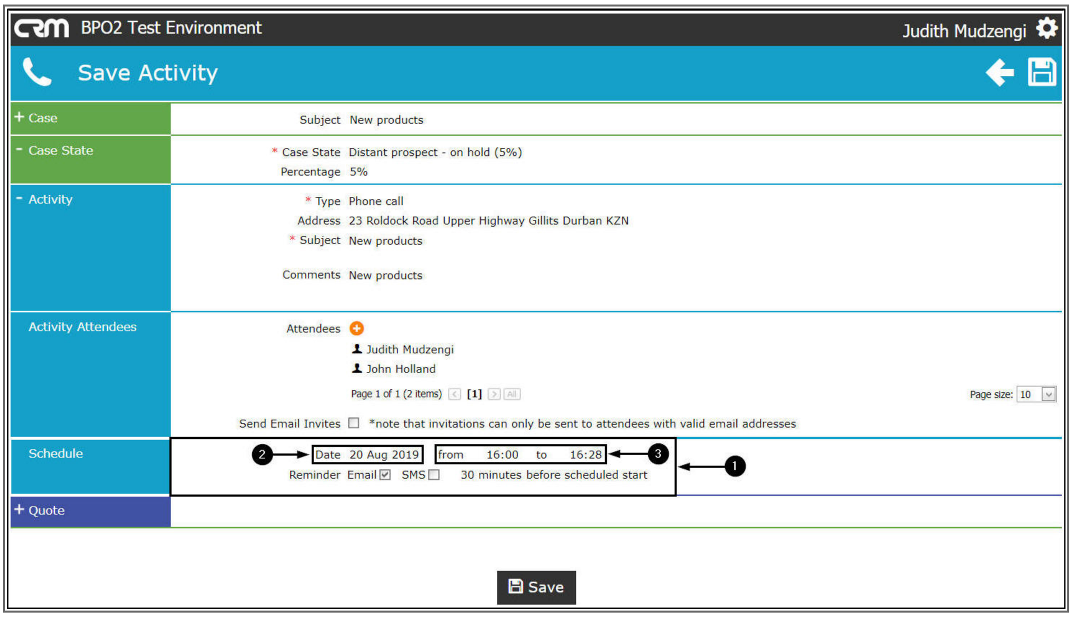
- Click on the **Reschedule this Activity** icon.



- The **Save Activity** screen will be displayed.

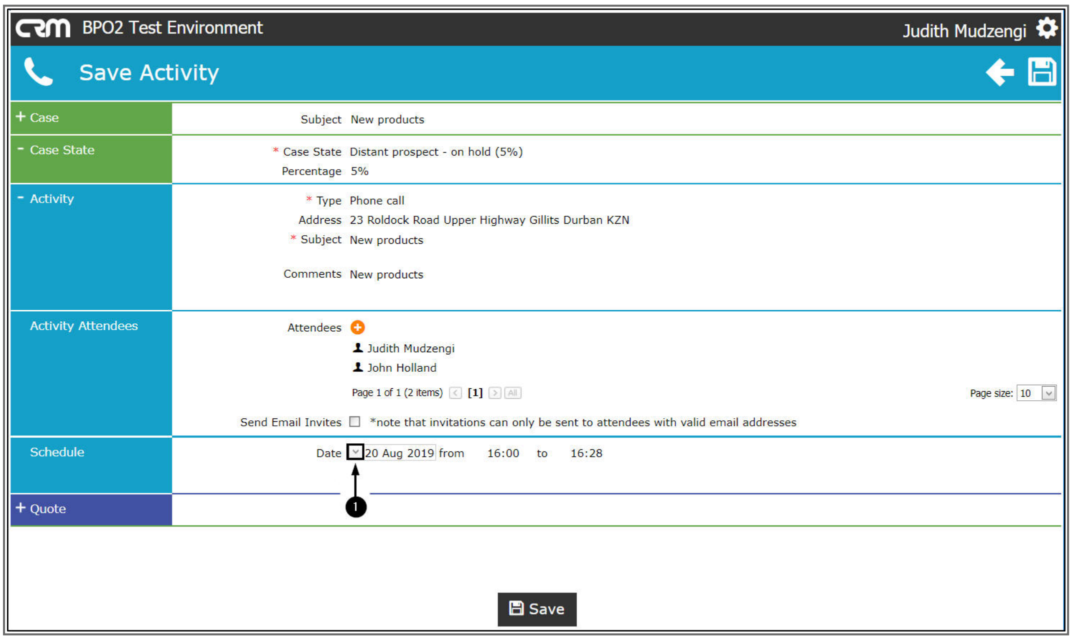


1. Go to the **Schedule** section.
2. You can adjust the date and or
3. time.

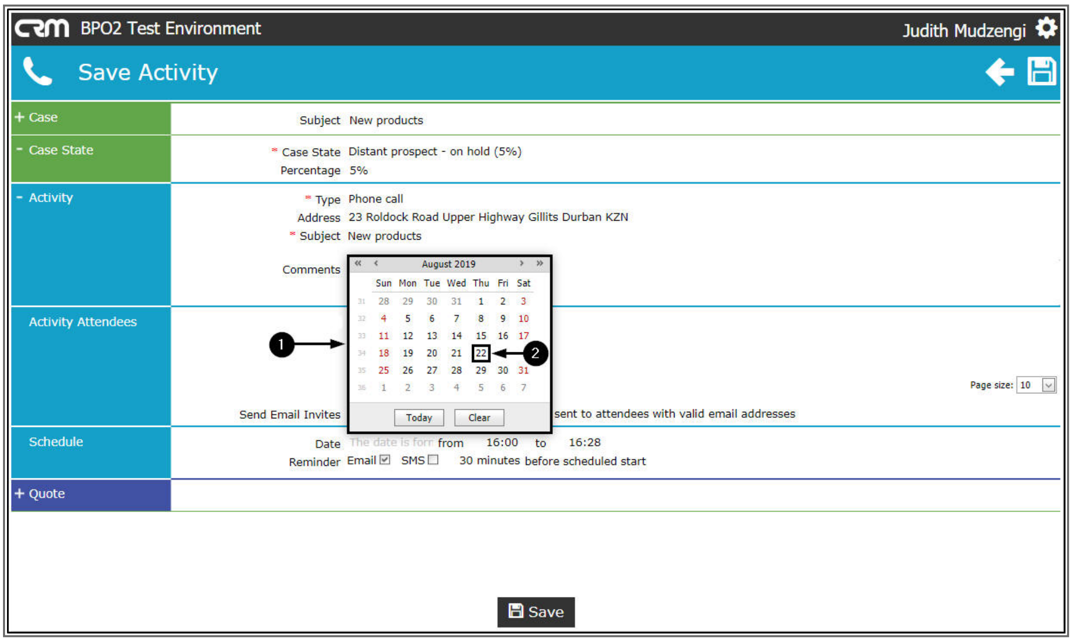


Adjust the Date

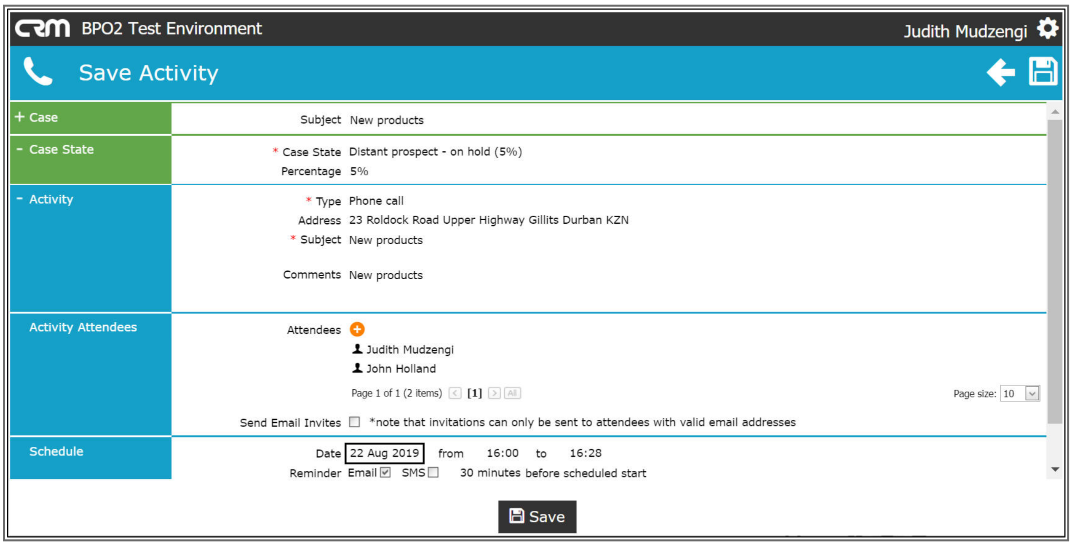
1. Hover over the **Date** field, a **down arrow** will be displayed. Click on this **arrow**.



1. A **calendar** will pop up.
2. Select the relevant date.

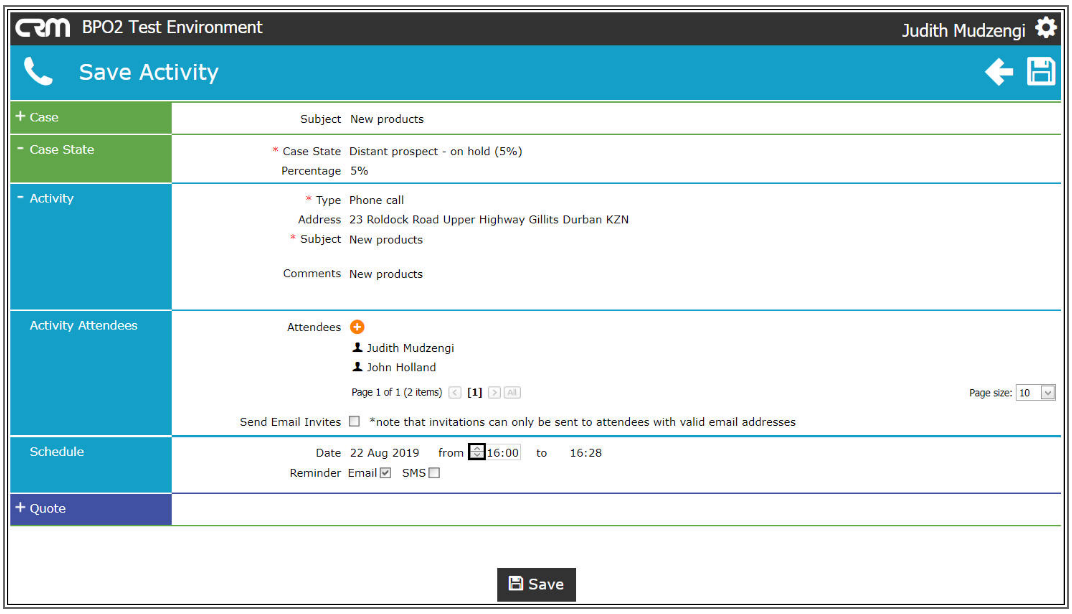


- The **Date** field will now be populated with the selected date.

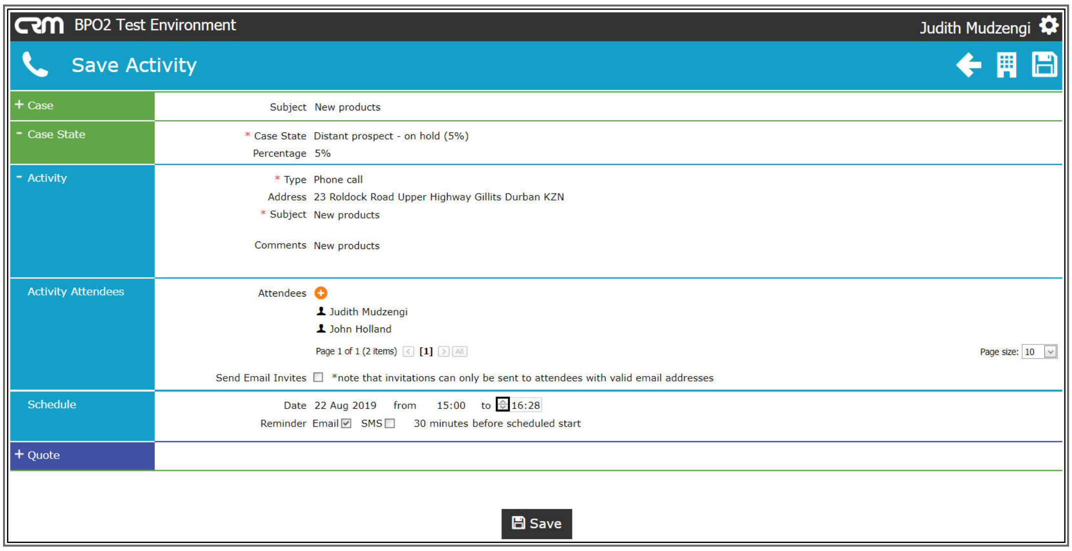


Adjust the Time

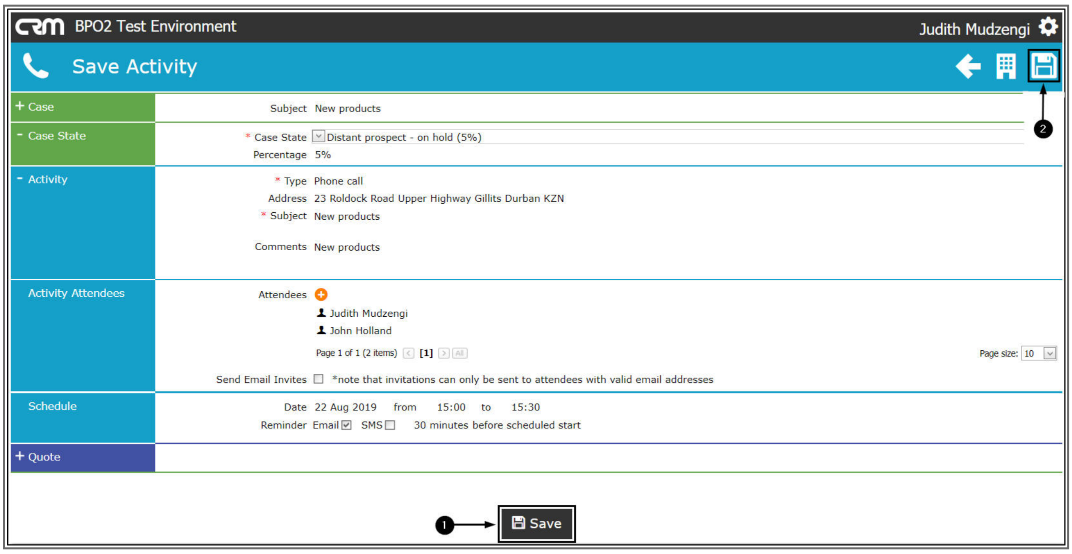
- **From**: Either hover over the field and click on the **directional arrows** to adjust the time or
- type in the relevant time.



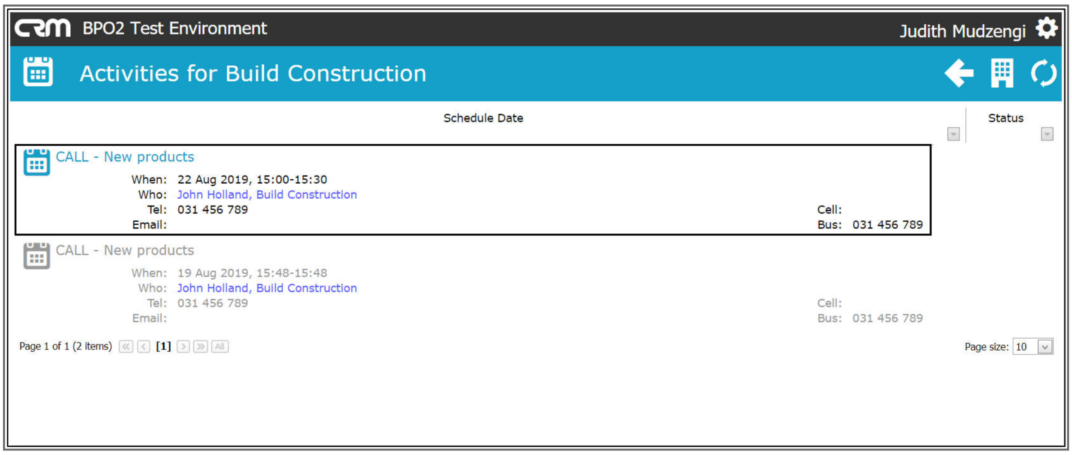
- **To** : Either hover over the field and click on the **up and down arrows** to adjust the time or
- type in the relevant time.



- Click on either the **Save** button or
- **Save** icon.



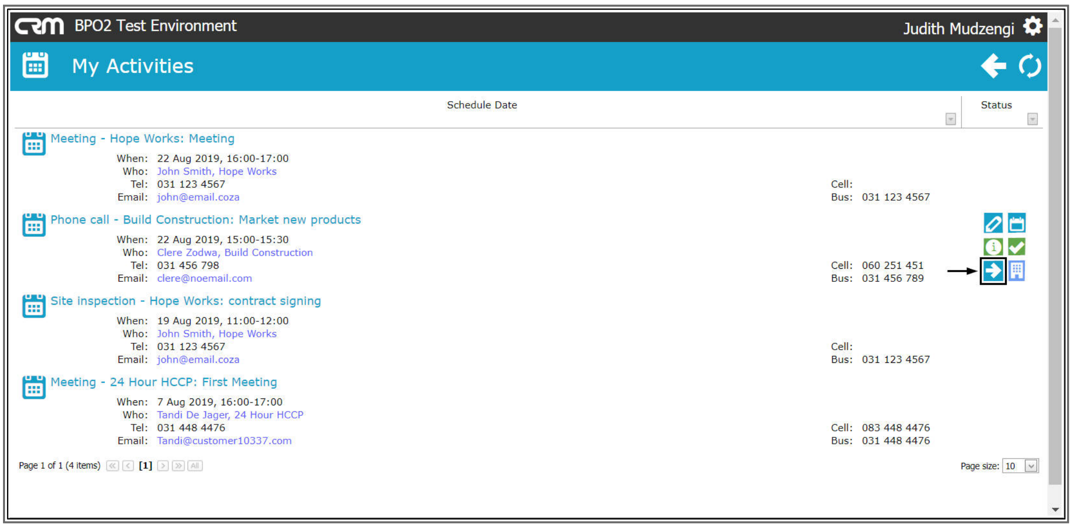
- The **Activities for [ ]** screen will be displayed.
- The rescheduled activity will be displayed in this screen.



NEXT ACTION

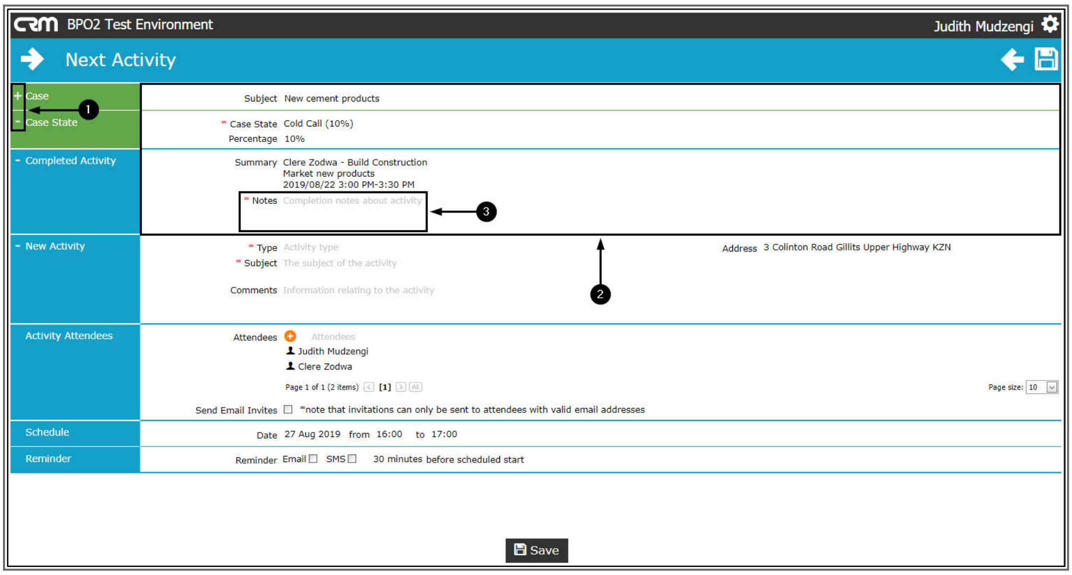
This allows you to close a current activity and create a new activity.

- Click on the **Next Action** icon.

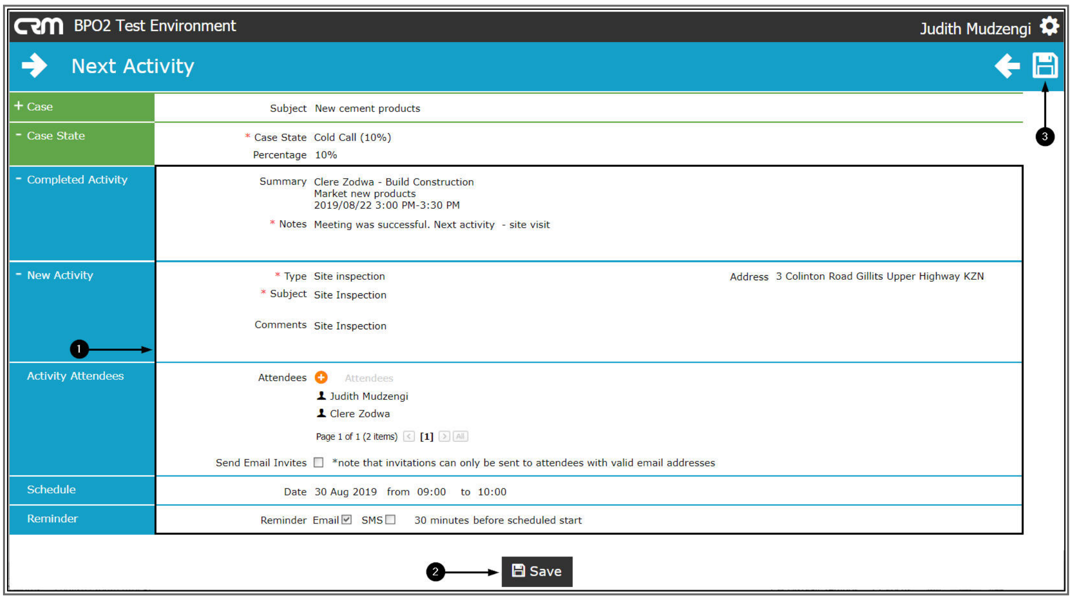


- The **Next Activity** screen will be displayed.
  1. Click on the ' **+** ' sign to view more details or click on the ' **-** ' sign to view less details.
  2. The current case / activity details will auto populate but you can edit the details if you wish to.

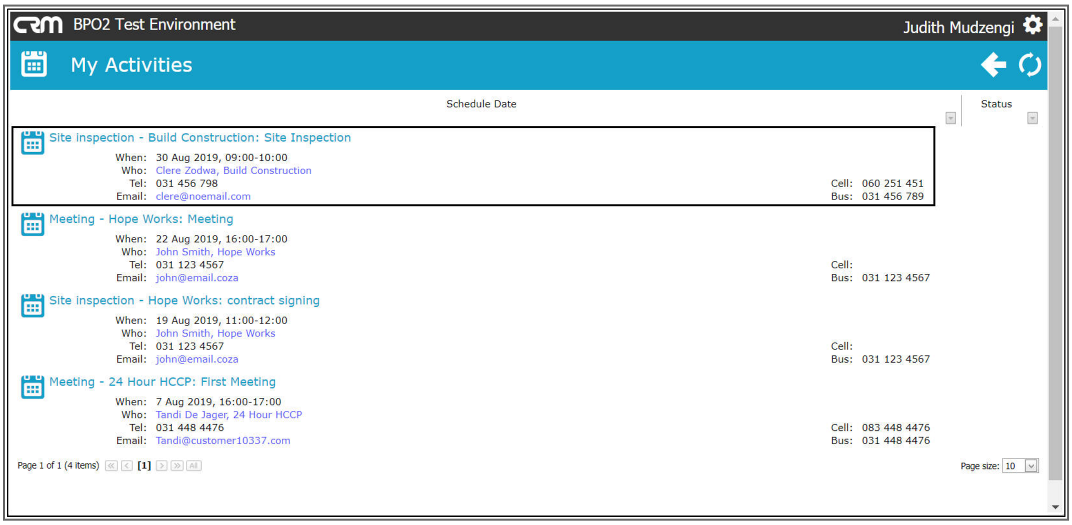
3. Type in the relevant **completion notes** of the current activity.



1. Update the new activity information.
2. Click on either the **Save** button or
3. **Save** icon.

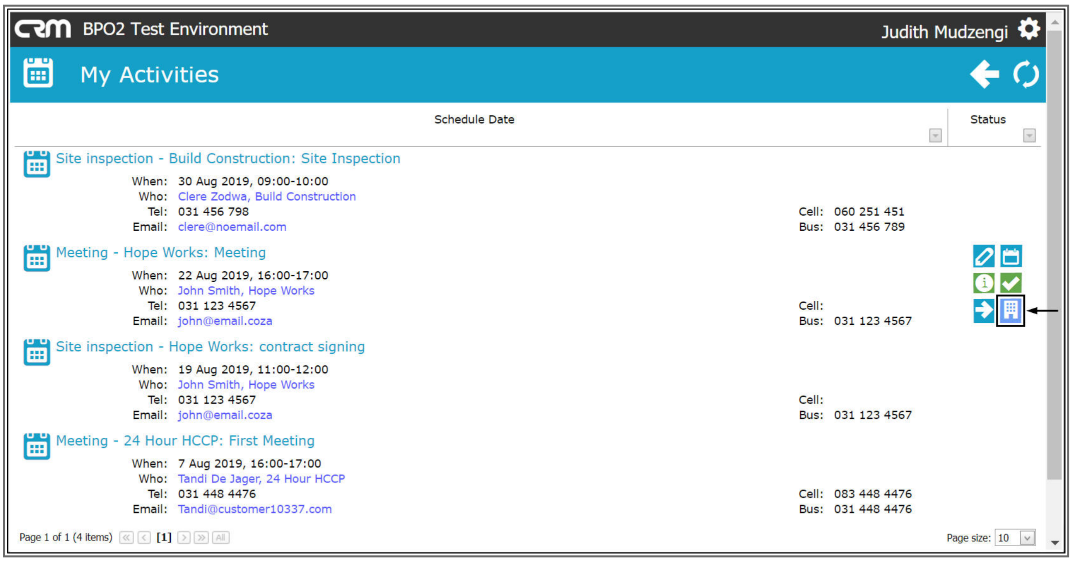


- The **My Activities** screen will be displayed.
- The completed activity will be removed from this screen.
- The new activity will be displayed in this screen.

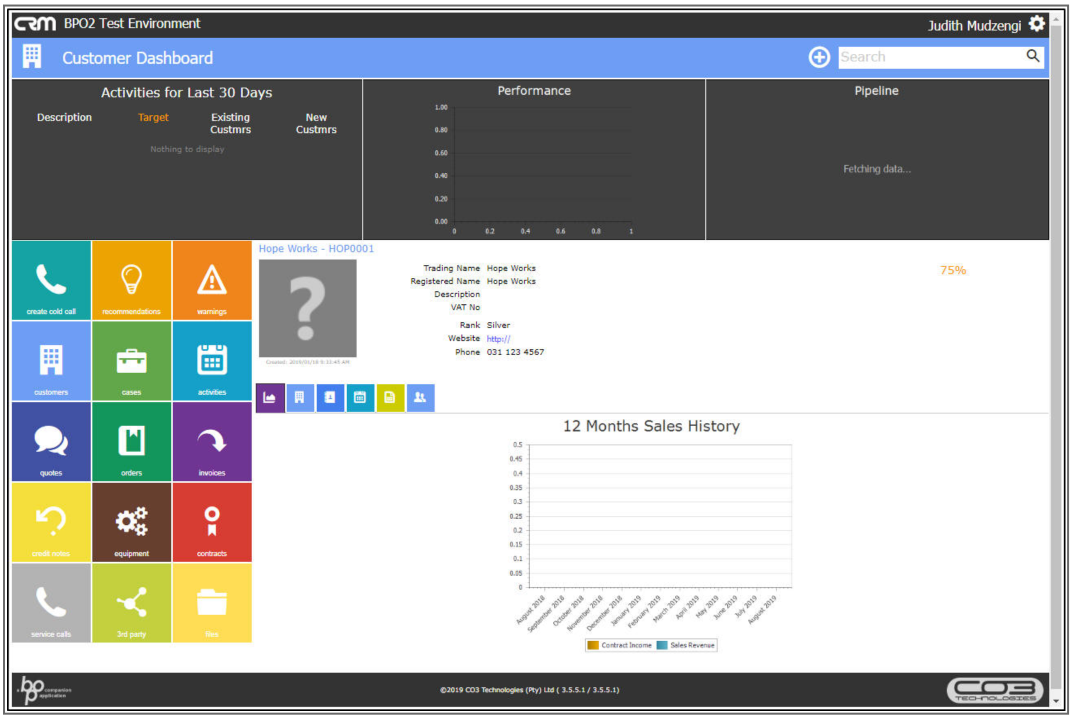


VIEW CUSTOMER

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



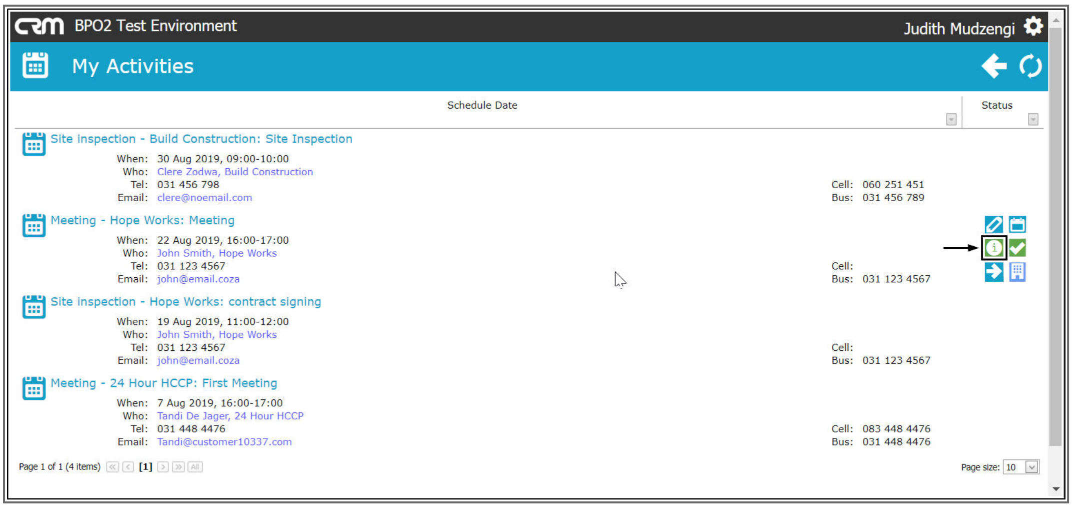
- The **Customer Dashboard** will be displayed.
- You can now view the selected customer's details.



OTHER ACTION ITEMS

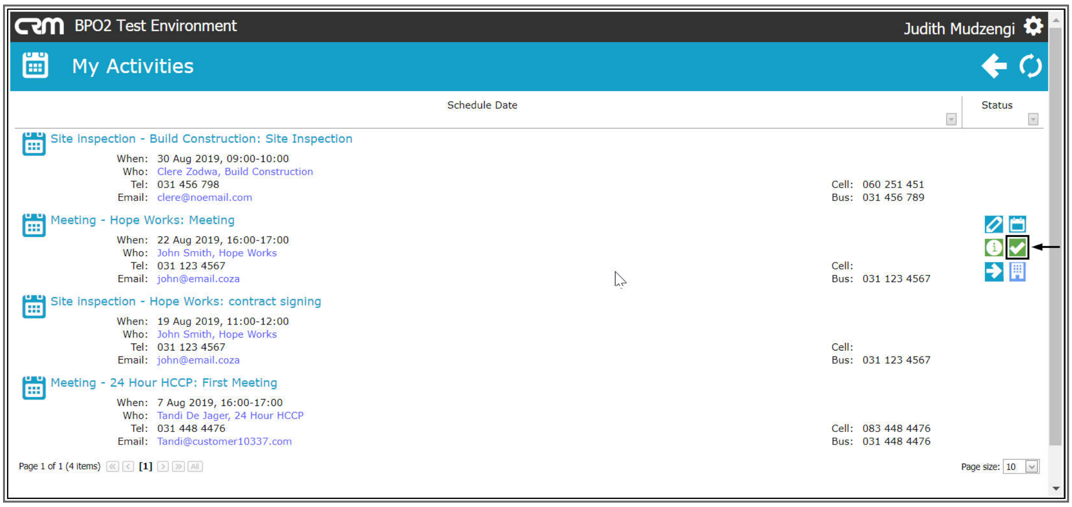
You can also

- View Case Info and History



and

- Close a Case.


BPO2 Test Environment
Judith Mudzengi
My Activities
Schedule Date
Status
Site Inspection - Build Construction: Site Inspection
When: 30 Aug 2019, 09:00-10:00
Who: Clere Zodwa, Build Construction
Tel: 031 456 798
Email: clere@noemail.com
Cell: 060 251 451
Bus: 031 456 789
Meeting - Hope Works: Meeting
When: 22 Aug 2019, 16:00-17:00
Who: John Smith, Hope Works
Tel: 031 123 4567
Email: john@email.coza
Cell:
Bus: 031 123 4567
Site Inspection - Hope Works: contract signing
When: 19 Aug 2019, 11:00-12:00
Who: John Smith, Hope Works
Tel: 031 123 4567
Email: john@email.coza
Cell:
Bus: 031 123 4567
Meeting - 24 Hour HCCP: First Meeting
When: 7 Aug 2019, 16:00-17:00
Who: Tandi De Jager, 24 Hour HCCP
Tel: 031 448 4476
Email: Tandi@customer10337.com
Cell: 083 448 4476
Bus: 031 448 4476
Page 1 of 1 (4 items)
[1]
Page size: 10

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