

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

CRM ACTIVITIES

TODAY'S ACTIVITIES

This is a list of Activities that are due **today** , that you can follow up on and action directly.

As you work through your activities and complete them, they will be **removed** from the list.

All activities that were due on the current day, but not actioned, will show up in your **Warnings** the following day.

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

SELECT THE TODAY TAB

1. In the **Dashboard** (Home page) screen,
2. Ensure that the **Today** tab is selected to be able to view the day's activities.

The screenshot shows a CRM dashboard for 'Example Company' with user 'Abigail Milne'. The dashboard includes a 'Dashboard' menu, a search bar, and three main sections: 'Activities for Last 30 Days', '1 Month Performance', and '4 Month Pipeline'. The 'Activities for Last 30 Days' table is as follows:

Description	Target	Existing Custmrs	New Custmrs
Phone call	10000	0	1
Email	0	0	0
Meeting	0	0	0
On Site inspection	0	0	1
Site inspection	2	0	0

The '1 Month Performance' chart shows values for Cases, Invoices, Orders, and Quotes. The '4 Month Pipeline' chart shows values for Jul 2019, Aug 2019, Sep 2019, and Oct 2019. Below these are several widgets: 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'equipment', and '3rd party'. A detailed view of an activity is shown on the right, including a calendar view and a list of activities with details like 'When', 'Who', 'Tel', and 'Email'.

DISPLAY THE ACTION BUTTONS

1. Hover over an activity to display **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**
2. Hover over any of these to bring up a **button description** text box.

The screenshot shows a CRM dashboard for 'Example Company' with the user 'Abigail Milne'. The dashboard includes a search bar, a 'Dashboard' title, and three main sections: 'Activities for Last 30 Days', '1 Month Performance', and '4 Month Pipeline'.

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Phone call	10000	0	1
Email	0	0	0
Meeting	0	0	0
On Site inspection	0	0	1
Site inspection	2	0	0

1 Month Performance

Bar chart showing performance metrics for Cases, Invoices, Orders, and Quotes from July 2019 to October 2019. The Y-axis ranges from 0.00 to 15,000.00.

4 Month Pipeline

Bar chart showing the pipeline for July 2019, August 2019, September 2019, and October 2019. The Y-axis ranges from 0.00 to 4,000.00.

Activities List

Activity	When	Who	Cell	Bus
Email - Networking and Laptops: Email product brochure.	22 Jul 2019, 15:00-16:00	John Jackson, Networking and Laptops	031 123 4567	
Phone call - King Enterprises: Phone call to discuss present client requirements and give overview of new product range.	22 Jul 2019, 13:00-14:00	Jason King, King Enterprises	0123456789	

The 'Next Action' button is highlighted with a red box and a '2' in a circle. A '1' in a circle points to the first activity in the list.

ACTIVITY QUICK VIEW SUMMARY

1. **Single click** on any activity in this screen,
2. To access a **quick view summary** of the activity information.

CRM Example Company | Abigail Milne

Dashboard | Search

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Phone call	10000	0	1
Email	0	0	0
Meeting	0	0	0
On Site Inspection	0	0	1
Site Inspection	2	0	0

1 Month Performance

Bar chart showing performance for Cases, Invoices, Orders, and Quotes from July 2019 to October 2019.

4 Month Pipeline

Bar chart showing pipeline values for Jul 2019, Aug 2019, Sep 2019, and Oct 2019.

Activity Summary:

- create cold call: 30 Sep 2016, 0
- recommendations: 4
- warnings: 4
- customers: 74
- cases: 8
- activities: 8
- quotes: 5
- equipment: 147
- 3rd party: 4

Activity Details:

Email - Networking and Laptops: Email product brochure

When: 22 Jul 2019, 15:00-16:00
 Who: John Jackson, Networking and Laptops
 Tel: [Redacted]
 Email: [Redacted]
 Cell: 031 123 4567
 Bus: 031 123 4567

Where: PO Box 1234 Forest Hills New Town Durban KZN
 Case: Call client to discuss new product range
 Comments: Client interested in multi-functional copiers
 Completion Notes: [Redacted]

Phone call - King Enterprises: Phone call to discuss present client requirements and give overview of new product range.

When: 22 Jul 2019, 13:00-14:00
 Who: Jason King, King Enterprises
 Tel: [Redacted]
 Email: [Redacted]
 Cell: 0123456789
 Bus: 0123456789

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NAVIGATE TO CUSTOMER DASHBOARD

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

The screenshot displays a CRM dashboard for 'Example Company' with the user 'Abigail Milne'. The dashboard is divided into several sections:

- Activities for Last 30 Days:** A table showing activity counts for various types.

Description	Target	Existing Custmrs	New Custmrs
Phone call	10000	0	1
Email	0	0	0
Meeting	0	0	0
On Site inspection	0	0	1
Site inspection	2	0	0
- 1 Month Performance:** A bar chart showing performance metrics for Cases, Invoices, Orders, and Quotes.
- 4 Month Pipeline:** A bar chart showing the pipeline over a 4-month period from July 2019 to October 2019.
- Navigation Tiles:** A grid of tiles for 'create co/d call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'equipment', and '3rd party'.
- Activity List:** A list of activities with details such as 'When', 'Who', 'Tel', 'Email', 'Cell', and 'Bus'. An arrow points to the 'Who' field of the first activity: 'John Jackson, Networking and Laptops'.

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.

CRM Example Company
Abigail Milne

Customer Dashboard 1
 Search

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	1
Email	120	0	0
Meeting	40	0	0
On Site inspection	50	0	1
Site inspection	2	0	0

1 Month Performance

4 Month Pipeline

create odd call

recommendations

warnings

customers

cases

activities

quotes

orders

invoices

credit notes

equipment

contracts

service calls

3rd party

files

Networking and Laptops - NET001

Created: 2018/10/18 4:39:35 PM

Trading Name: Networking and Laptops Inc. 50%

Registered Name: Networking and Laptops

Description:

VAT No: 123456789

Registration: 987654321

Rank: Metal

Website: <http://www.net.co.za>

Phone: 031 123 4567

12 Months Sales History

Integration Application

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