

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

CRM ACTIVITIES

RECENT ACTIVITIES

This is a list of Activities over the last 7 days.

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

SELECT THE RECENT TAB

- 1. In the **Dashboard** (Home page) screen,
- 2. Ensure that the **Recent** tab is selected to be able to view activities over the last 7 days.
- 3. If a recent Activity is completed, the activity heading and icon is feint (grey). You will not be able to access the Action buttons.

DISPLAY THE ACTION BUTTONS

- 4. If an activity is yet to be completed, then the header and icon will be bold (blue) and if you hover over the activity, the Action buttons will appear:
 - 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

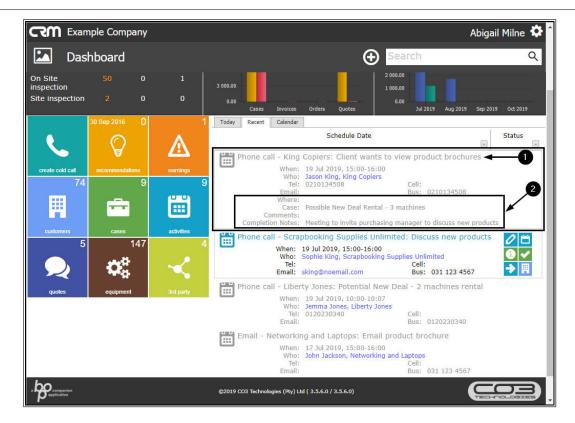




ACTIVITY QUICK VIEW SUMMARY

- 1. Single click on any activity.
- 2. To access a **quick view summary** of the activity information.

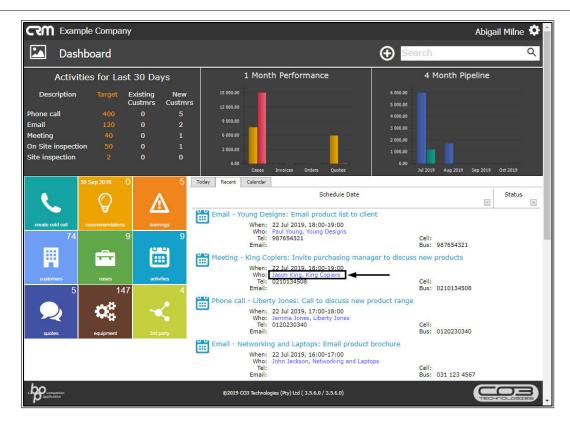




NAVIGATE TO CUSTOMER DASHBOARD

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





- 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.





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