

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](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**

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'.

Activities for Last 30 Days

| Description | Target | Existing Custmrs | New Custmrs |
|--------------------|--------|------------------|-------------|
| Phone call | 400 | 0 | 5 |
| Email | 120 | 0 | 1 |
| Meeting | 40 | 0 | 1 |
| On Site inspection | 50 | 0 | 1 |
| Site inspection | 2 | 0 | 0 |

1 Month Performance

Bar chart showing performance for Cases, Invoices, Orders, and Quotes. A callout '2' points to the 'Invoices' bar.

4 Month Pipeline

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

Recent Activities

| Activity | Schedule Date | Status |
|--|--------------------------|-------------|
| Phone call - King Copiers: Client wants to view product brochures | 19 Jul 2019, 15:00-16:00 | Completed |
| Phone call - Scrapbooking Supplies Unlimited: Discuss new products | 19 Jul 2019, 15:00-16:00 | In Progress |
| Phone call - Liberty Jones: Potential New Deal - 2 machines rental | 19 Jul 2019, 10:00-10:07 | Completed |

Callout '3' points to the first activity, and callout '4' points to the second activity.

ACTIVITY QUICK VIEW SUMMARY

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

CRM Example Company | Abigail Milne

Dashboard

On Site inspection: 50, 0, 1
Site inspection: 2, 0, 0

3 000.00 | 0.00 | Cases | Invoices | Orders | Quotes

2 000.00 | 1 000.00 | 0.00 | Jul 2019 | Aug 2019 | Sep 2019 | Oct 2019

Today | Recent | Calendar

Schedule Date | Status

Phone call - King Copiers: Client wants to view product brochures

When: 19 Jul 2019, 15:00-16:00
Who: [Jason King, King Copiers](#)
Tel: 0210134508 | Cell: 0210134508
Email: [redacted]

Where: [redacted]
Case: Possible New Deal Rental - 3 machines
Comments: [redacted]
Completion Notes: Meeting to invite purchasing manager to discuss new products

Phone call - Scrapbooking Supplies Unlimited: Discuss new products

When: 19 Jul 2019, 15:00-16:00
Who: [Sophie King, Scrapbooking Supplies Unlimited](#)
Tel: [redacted] | Cell: [redacted]
Email: sking@noemail.com | Bus: 031 123 4567

Phone call - Liberty Jones: Potential New Deal - 2 machines rental

When: 19 Jul 2019, 10:00-10:07
Who: [Jemma Jones, Liberty Jones](#)
Tel: 0120230340 | Cell: [redacted]
Email: [redacted] | Bus: 0120230340

Email - Networking and Laptops: Email product brochure

When: 17 Jul 2019, 15:00-16:00
Who: [John Jackson, Networking and Laptops](#)
Tel: [redacted] | Cell: [redacted]
Email: [redacted] | Bus: 031 123 4567

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NAVIGATE TO CUSTOMER DASHBOARD

- Click on the blue link in the **Who** field of any of the recent 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 with columns for Description, Target, Existing Custmrs, and New Custmrs.

| Description | Target | Existing Custmrs | New Custmrs |
|--------------------|--------|------------------|-------------|
| Phone call | 400 | 0 | 5 |
| Email | 120 | 0 | 2 |
| Meeting | 40 | 0 | 1 |
| On Site inspection | 50 | 0 | 1 |
| Site inspection | 2 | 0 | 0 |
- 1 Month Performance:** A bar chart showing performance for Cases, Invoices, Orders, and Quotes. Cases and Invoices are the highest, with Cases at approximately 14,000.00 and Invoices at approximately 7,000.00.
- 4 Month Pipeline:** A bar chart showing the pipeline for Jul 2019, Aug 2019, Sep 2019, and Oct 2019. Jul 2019 has the highest value at approximately 5,500.00.
- Links Tiles:** A grid of tiles for 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'equipment', and '3rd party'.
- Recent Activities List:** A list of activities with details such as 'When', 'Who', 'Tel', 'Email', 'Cell', and 'Bus'. One activity is highlighted: 'Meeting - King Copiers: Invite purchasing manager to discuss new products' with 'Who: Jason King, King Copiers' highlighted by a black box and an arrow.

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

| Description | Target | Existing Custmrs | New Custmrs |
|--------------------|--------|------------------|-------------|
| Phone call | 400 | 0 | 5 |
| Email | 120 | 0 | 2 |
| Meeting | 40 | 0 | 1 |
| On Site inspection | 50 | 0 | 1 |
| Site inspection | 2 | 0 | 0 |

1 Month Performance

4 Month Pipeline

King Copiers - KIN0001

Trading Name: King Copiers
Registered Name: King Copiers
Description: VAT No
Rank: Bronze
Website: http://
Phone: 0210134508

58%

12 Months Sales History

Legend: Contract Income (Yellow), Sales Revenue (Blue)

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CRM.001.002

