

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

CRM CUSTOMERS

ACTIVITIES

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

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

A **full list of all customers activities** can be accessed from the **Dashboard** (Home Page).

A Client specific list of activities can be accessed from the **Customer Dashboard** (Customer Home page), as set out below

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

ACCESS CLIENT SPECIFIC LIST OF ACTIVITIES

1. In the **Dashboard** (Home page),
2. Click on the **Customers** tile.

The screenshot shows a CRM dashboard for 'Example Company' with the user 'Abigail Milne'. The dashboard includes a search bar, a 'Dashboard' tab, and several data visualization components:

- Activities for Last 30 Days:** A table comparing target, existing, and new customers for different activity types.
- 1 Month Performance:** A bar chart showing performance for Cases, Invoices, Orders, and Quotes.
- 4 Month Pipeline:** A bar chart showing the pipeline over four months (Oct 2019 to Jan 2020).
- Activity Tiles:** A grid of tiles for 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'equipment', and '3rd party'.
- Calendar View:** A section for 'Schedule Date' and 'Status' with a 'No data to display' message.

Description	Target	Existing Custmrs	New Custmrs
Phone call	20	2	2
Email	30	0	0
Meeting	20	0	0
On Site inspection	20	0	0
Site inspection	2	0	0

1. The **Customers** listing page will open.
2. Click on the **customer icon** in the **View** column.

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The 'Customers' tab is active. A search filter is present above a table of customer records. The first record, 'Hope Works', has its 'Activities' tile selected.

View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
	Hope Works	HOP001	Duncan McCreddie	098 765 432	d.mccreddie@noem	91%	Active	Platinum	Yes	Yes
	IT Supplies	ITS0001				8%	Active		No	No
	Joels Carpentry Shop	JOE0001	Mary Watson	031 123 456		50%	New - CRM	Gold	No	Yes
	Judes Jewels	JUD0001				8%	New - CRM	Silver	No	No
	Just In Time	JUS001				16%	Active		Yes	No
	King Copiers	KIN0001	Jason King	0210134506		58%	Released	Bronze	No	Yes
	King Enterprises	KIN0002	Lucy Rowe			50%	Active	Silver	No	Yes
	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	Active	Silver	No	Yes
	Little Bee Honey	LIT0001	John Ginseng	031 123 456		66%	Active	Silver	No	Yes
	Lovely Test Customer	LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes

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1. The selected **Customer Dashboard** (Customer Home page) will open.
2. Click on the **Activities** tile.

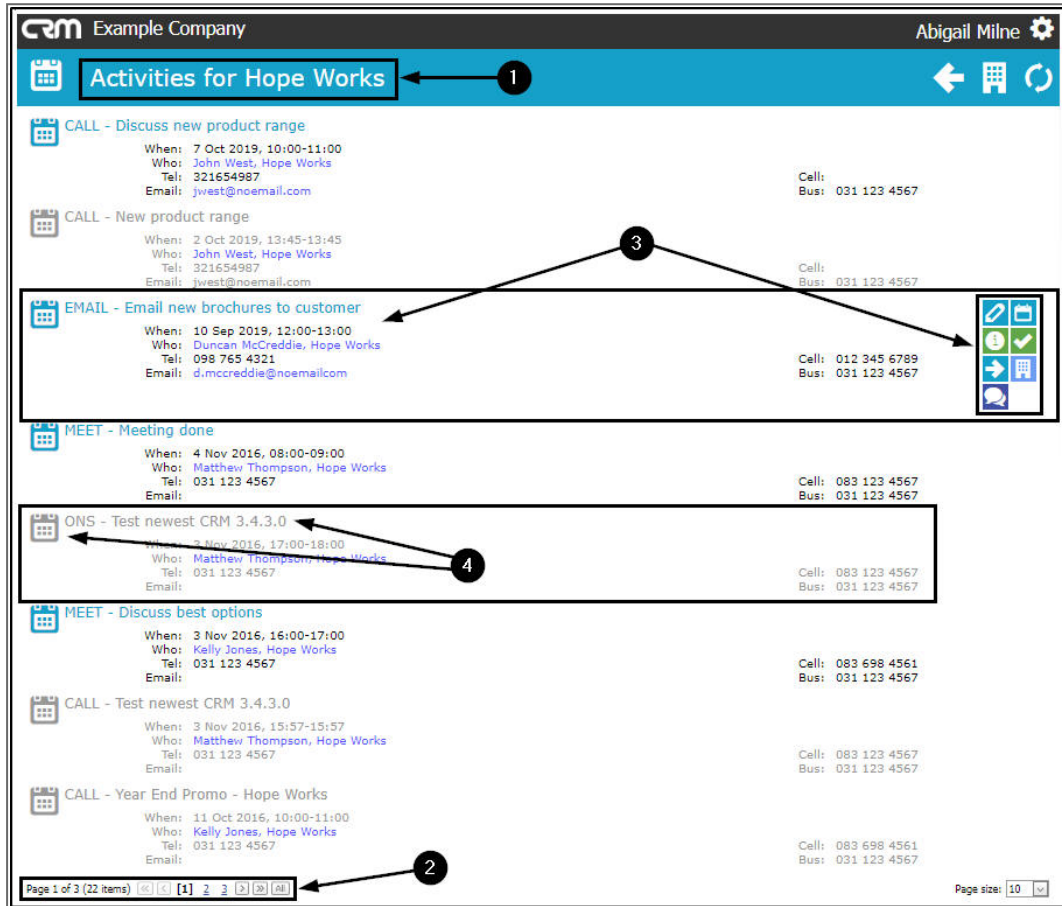
1. The **Activities for [Customer Name]** page will open listing all the activities linked to this customer.
2. The **Page Reference field** notes how many activities there are and on how many pages.

VIEW ACTIVITY ACTION BUTTONS

3. **Hover over** any activity to display the activity **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**
- **New Quote**

4. Any **greyed out** activities are linked to a different salesman - Action buttons will not be available and you cannot edit these activities.



VIEW SUMMARY OF ACTIVITY INFORMATION

1. **Single click** on an activity, to access a quick view **summary** of the activity information.

2. If the selected activity is linked to yourself then this single click will also keep the **Action buttons** consistently displayed in the selected activity frame.

The screenshot shows a CRM interface for 'Example Company' with the user 'Abigail Milne'. The page title is 'Activities for Hope Works'. A list of activities is displayed, with the 'EMAIL - Email new brochures to customer' activity selected and highlighted with a black box. A callout '1' points to the activity title, and a callout '2' points to the action buttons (edit, delete, check, back, forward, search, refresh) on the right side of the activity card. The activity details for the selected email include: When: 10 Sep 2019, 12:00-13:00; Who: Duncan McCreddie, Hope Works; Tel: 098 765 4321; Email: d.mccreddie@noemail.com; Where: Plot 91 Leaf Road, Forest Hills, New Town, Durban South, South Africa; Case: Email new brochures; Comments: ; Completion Notes: .