

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

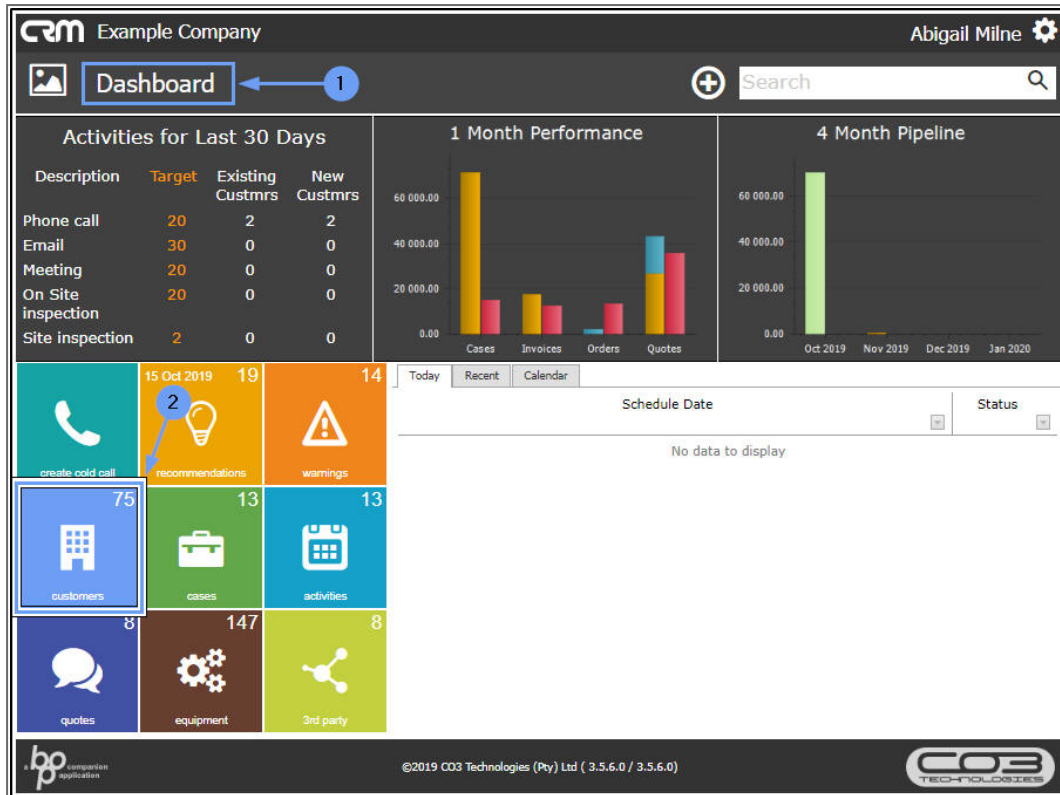
A **full list of all customers activities** can be accessed from the **Dashboard** (Home Page).

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.



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


Example Company
Abigail Milne

Customers

1

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
	Joes 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	0210134508		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

Page 4 of 8 (74 items)

1
2
3
4
5
6
7
8
9
10

Page size: 10

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



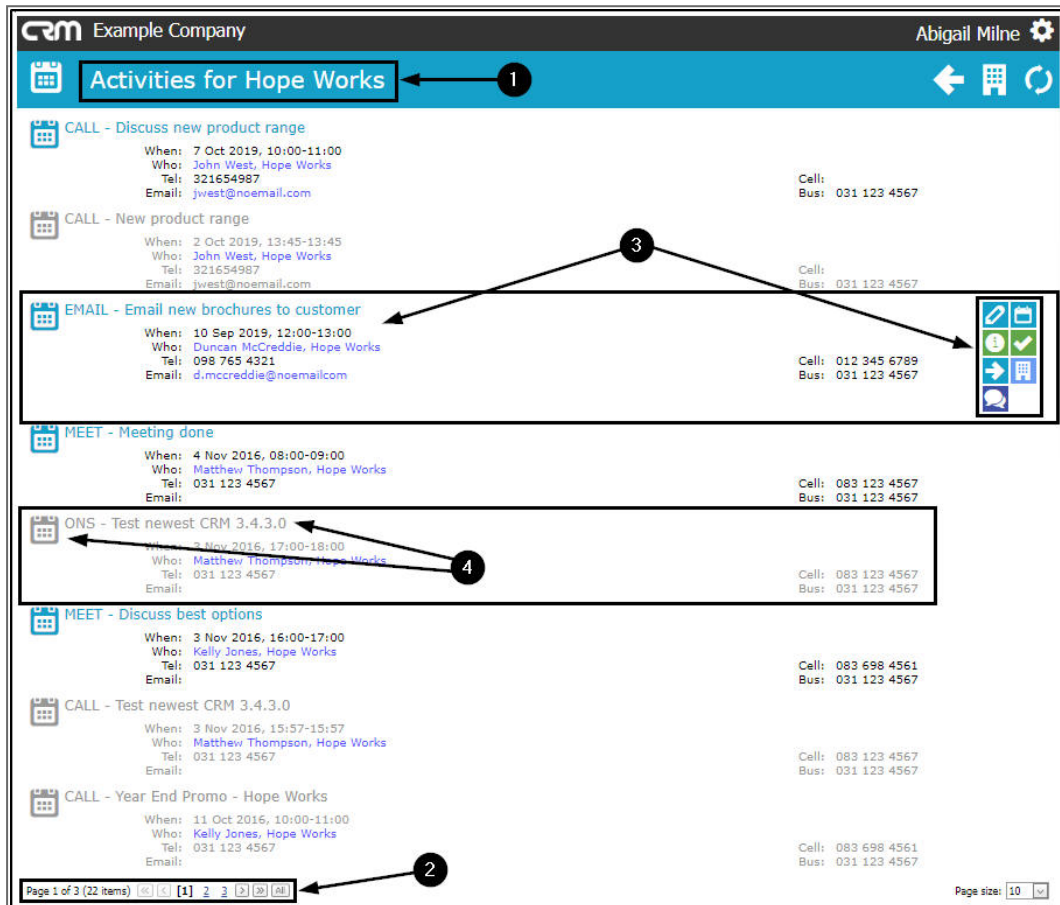
1. The **Activities for [Customer Name]** page will open listing all the activities linked to this customer.
2. The **Page Reference field** notes how many activities there are and on how many pages.

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.

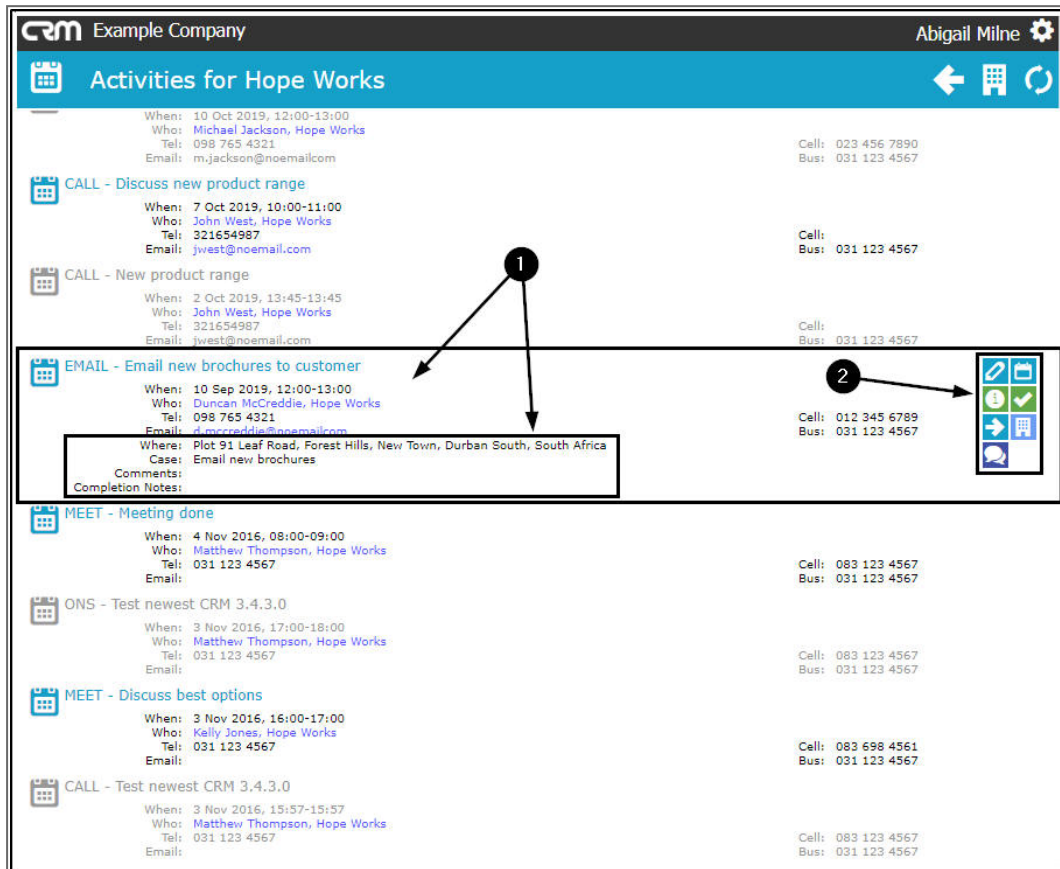


The screenshot displays the 'Activities for Hope Works' page in a CRM system. The page header shows 'Example Company' and the user 'Abigail Milne'. The main content area lists several activities, each with a calendar icon, title, and details. Callout 1 points to the 'Activities for Hope Works' header. Callout 2 points to the pagination controls at the bottom, showing 'Page 1 of 3 (22 items)' and navigation links. Callout 3 points to the action buttons (edit, delete, etc.) on the right side of the activity list. Callout 4 points to a greyed-out activity entry, indicating it is linked to a different salesman.

VIEW SUMMARY OF ACTIVITY INFORMATION

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

- 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.



CRM Example Company Abigail Milne

Activities for Hope Works

When: 10 Oct 2019, 12:00-13:00
Who: Michael Jackson, Hope Works
Tel: 098 765 4321
Email: m.jackson@noemail.com
Cell: 023 456 7890
Bus: 031 123 4567

CALL - Discuss new product range
When: 7 Oct 2019, 10:00-11:00
Who: John West, Hope Works
Tel: 321654987
Email: jwest@noemail.com
Cell: 031 123 4567
Bus: 031 123 4567

CALL - New product range
When: 2 Oct 2019, 13:45-13:45
Who: John West, Hope Works
Tel: 321654987
Email: jwest@noemail.com
Cell: 031 123 4567
Bus: 031 123 4567

EMAIL - Email new brochures to customer
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:
Cell: 012 345 6789
Bus: 031 123 4567

MEET - Meeting done
When: 4 Nov 2016, 08:00-09:00
Who: Matthew Thompson, Hope Works
Tel: 031 123 4567
Cell: 083 123 4567
Bus: 031 123 4567

ONS - Test newest CRM 3.4.3.0
When: 3 Nov 2016, 17:00-18:00
Who: Matthew Thompson, Hope Works
Tel: 031 123 4567
Cell: 083 123 4567
Bus: 031 123 4567

MEET - Discuss best options
When: 3 Nov 2016, 16:00-17:00
Who: Kelly Jones, Hope Works
Tel: 031 123 4567
Cell: 083 698 4561
Bus: 031 123 4567

CALL - Test newest CRM 3.4.3.0
When: 3 Nov 2016, 15:57-15:57
Who: Matthew Thompson, Hope Works
Tel: 031 123 4567
Cell: 083 123 4567
Bus: 031 123 4567