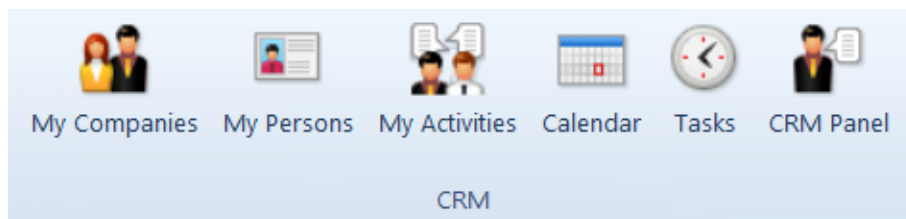


User's CRM area

All the CRM data is shared not only on the lists of particular objects they refer to. The data can also be reviewed on the lists dedicated to a logged-in operator. In those lists, there are objects (customers/vendors, persons, activities) assigned to an employee who is, in turn, assigned to a currently logged-in operator. The visibility of objects depends on granted [permissions](#) to preview selected objects of other employees.



User's CRM area

Tab *CRM* contains:

- **My Companies** – list of customers/vendors being supervised by a given employee. Defining of supervisors on a customer/vendor form is described in article [defining customer/vendor](#).
- **My Persons** – list of contact persons being [supervised](#) by a given employee.
- **My Activities** – list of [CRM activities](#) assigned to a given employee. It allows for adding and modifying of contacts, meetings and questionnaires.
- **Calendar** – presents employee's [calendar](#).
- **Tasks** – list containing all [tasks](#) of an employee.
- **CRM Panel** – presents the most important information regarding customers and vendors of the company, all contacts, tasks and opportunities related to them. The [CRM Panel] window is composed of employee's calendar view and a list of his/her contacts (*Contact Persons, Customers/Vendors*).

CRM Panel

August 30, 2021 - September 3, 2021

Anna Smith

	Monday, August 30	Tuesday, August 31	Wednesday, September 1	Thursday, September 2	Friday, September 3
8 AM					
9 00					
10 00					
11 00					
12 PM					
1 00					
2 00					
3 00					
4 00					

1:32 PM-3:32 PM Task: Phone conversations

Contact Persons

Code	First Name	Last Name	Association with Customer...	Supervisor	Assigned Customers/Vend...	Active
D=	Cheyenne	Massey		Anna Smith	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Filter

Groups

- Customers
- Vendors

Code	Name	TIN Prefix	TIN	Status
COMARCH	Comarch S.A.		677-00-65-406	Entity
Undefined	Undefined			Entity

Classification: Elementary - Basic clas

Show codes

Filter

CRM Panel