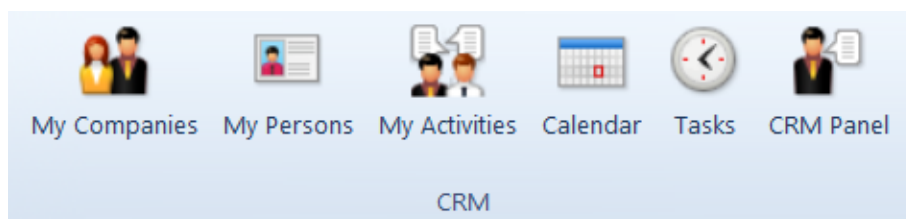


User's CRM area

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					

6:32 PM-5:32 PM Task Phone Conversation

Filter

Filter

Groups

Code

Customers

Vendors

Only active

Drag the column header here to group by that column

Code	Name	TIN Prefix	TIN	Status
COMARCH	Comarch S.A.		677-00-45-406	Entity
Undefined	Undefined			Entity

Classification: Elementary - Basic clas

Show codes

Filter

CRM Panel