

# CRM BASICS

## ADD A CONTACT

Each customer needs to have a **contact** , in order to:

- Call
- Send Emails
- Send Activity Notes

A customer must have a contact linked, who is set to **Receive Sales Calls**.

It is important to remember that additional contact people will need to be configured later within BPO2:

- In order for a customer to be approved within BPO, an **Accounts Contact** is required. This contact will receive invoicing.
- Each customer should have a **Primary Contact**. This person will receive notifications regarding service call status changes.
- You can also [add a contact in the Save Customer page](#).

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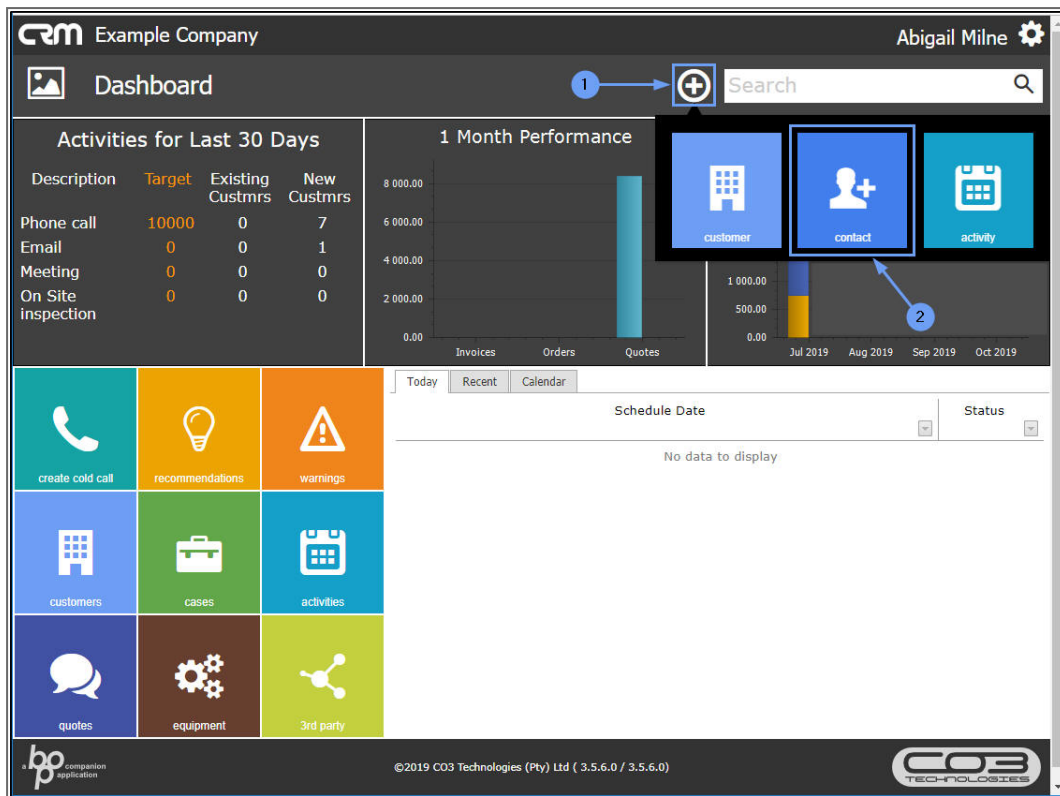
**Access:** Webpage - [http://\[servername\]:\[portno\]/BPOCRM/User.aspx](http://[servername]:[portno]/BPOCRM/User.aspx)

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## ADD NEW CONTACT FROM THE HOMEPAGE

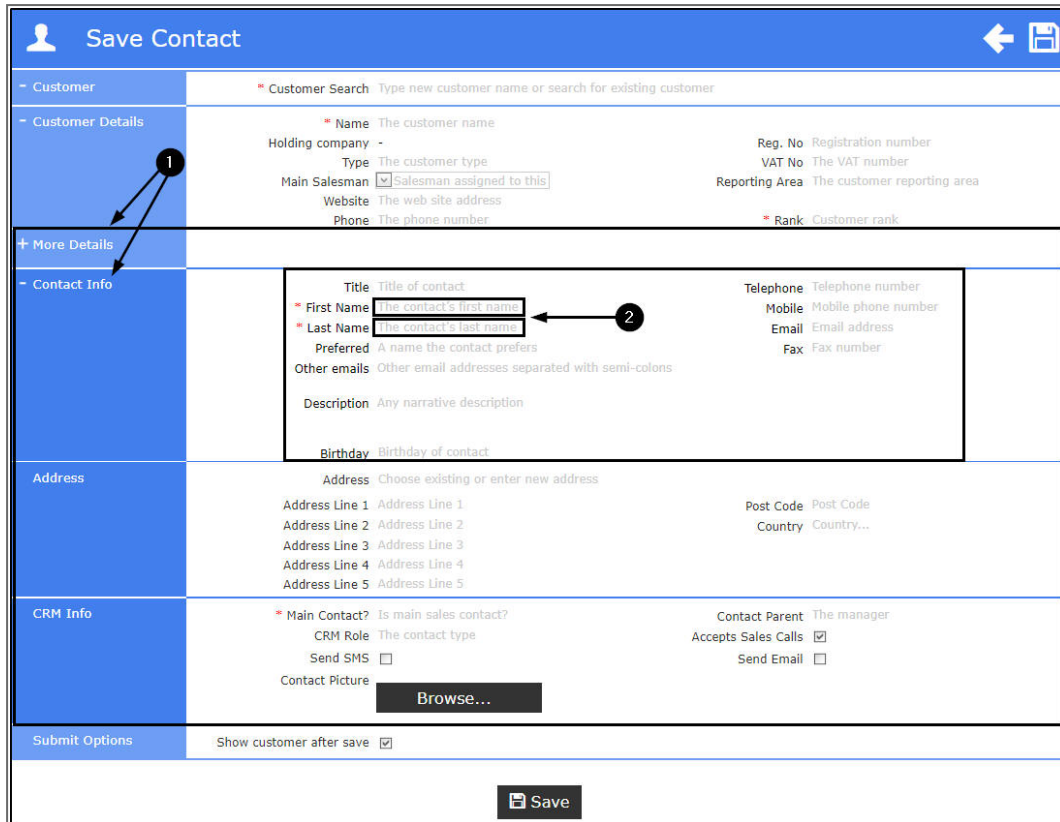
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- Click on the **Add new items...** icon.
- Click on the **Contact** tile.



## CONTACT INFO MANDATORY FIELDS

1. The **Save Contact** screen will open with the **More Details** section automatically expanded to display the **Contact Info** frame.
2. Click in the mandatory fields [\*] and type in the contact details.
  - **Note:** that only the **First Name** and **Last Name** fields are mandatory but you can add details to all the fields in this section if you have the information on hand.



**Save Contact**

**Customer**

\* Customer Search: Type new customer name or search for existing customer

**Customer Details**

\* Name: The customer name

Holding company: -

Type: The customer type

Main Salesman: ☒ Salesman assigned to this

Website: The web site address

Phone: The phone number

Reg. No: Registration number

VAT No: The VAT number

Reporting Area: The customer reporting area

\* Rank: Customer rank

**More Details**

**Contact Info**

Title: Title of contact

\* First Name: The contact's first name

\* Last Name: The contact's last name

Preferred: A name the contact prefers

Other emails: Other email addresses separated with semi-colons

Description: Any narrative description

Telephone: Telephone number

Mobile: Mobile phone number

Email: Email address

Fax: Fax number

Birthday: Birthday of contact

**Address**

Address: Choose existing or enter new address

Address Line 1: Address Line 1

Address Line 2: Address Line 2

Address Line 3: Address Line 3

Address Line 4: Address Line 4

Address Line 5: Address Line 5

Post Code: Post Code

Country: Country...

**CRM Info**

\* Main Contact?: Is main sales contact?

CRM Role: The contact type

Send SMS: ☐

Contact Picture:

Contact Parent: The manager

Accepts Sales Calls: ☒

Send Email: ☐

**Submit Options**

Show customer after save: ☒

## CUSTOMER SEARCH

### NEW CUSTOMER

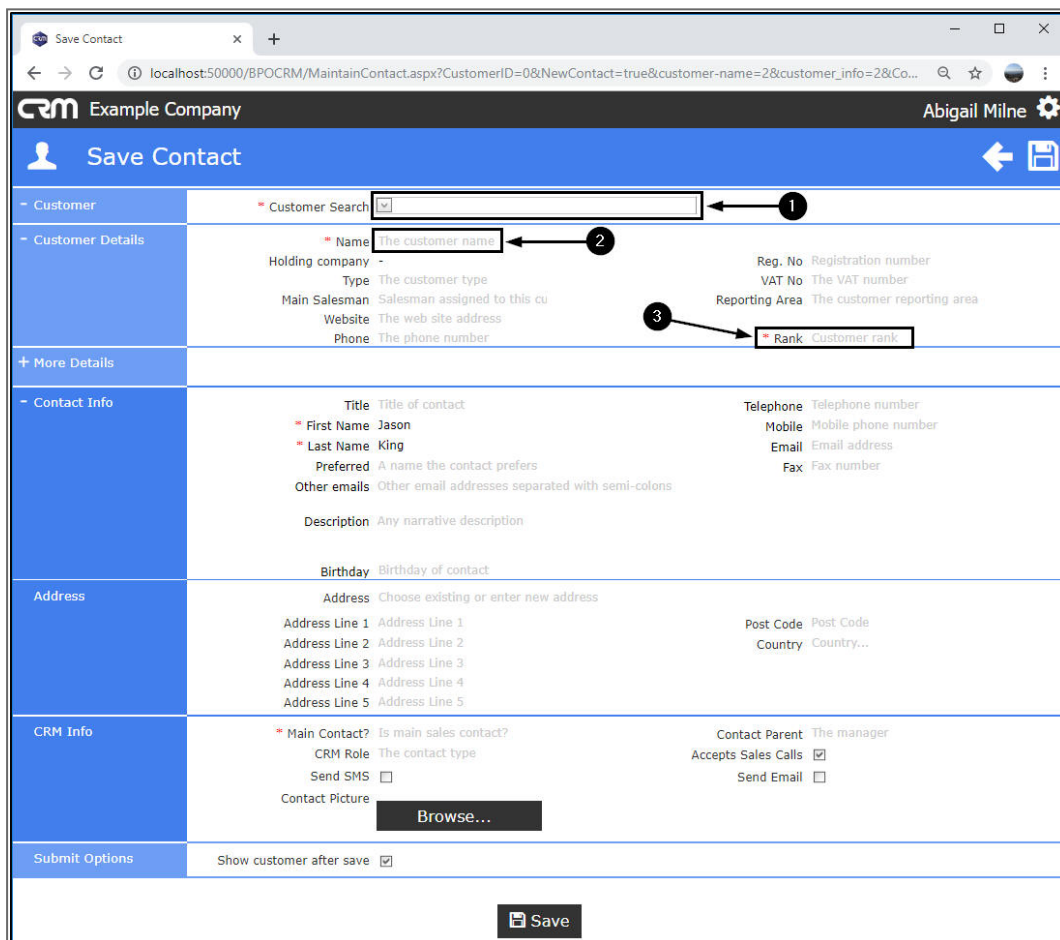
If you are adding the contact details for a **new** customer:

1. Go to the **Customer** frame, click in the **Customer Search** field and type in the new customer name.
2. Go to the **Customer Details** frame. As you click anywhere in this frame, the **Name** field will auto populate with the same text that was typed into the **Customer Search** field.
3. Click in the **Rank** field and select from the drop-down list the Rank **Call Cycle** for this new customer (e.g. **Platinum** Rank = the call cycle for this customer is every **15** days).

**Rank** is based on how much you **value** this customer and helps to define the call cycle per client. For example, a **Wood** ranking indicates that you will only contact this customer every **365** days - this customer is not valuable to you. However a **Platinum** ranking indicates that this is a very important customer that you wish to maintain a good relationship with, therefore you will contact them every **15** days.

Each customer must be linked to a Rank in CRM. **Customer Rank** can also be linked in the Customer Maintenance screen in BPO2.

The above mentioned fields are mandatory [\*] but you can add details to all the fields in these frames if you have the information on hand.



The screenshot shows the 'Save Contact' form in a web browser. The form is titled 'Save Contact' and is part of the 'CRM Example Company' interface. The user 'Abigail Milne' is logged in. The form is divided into several sections:

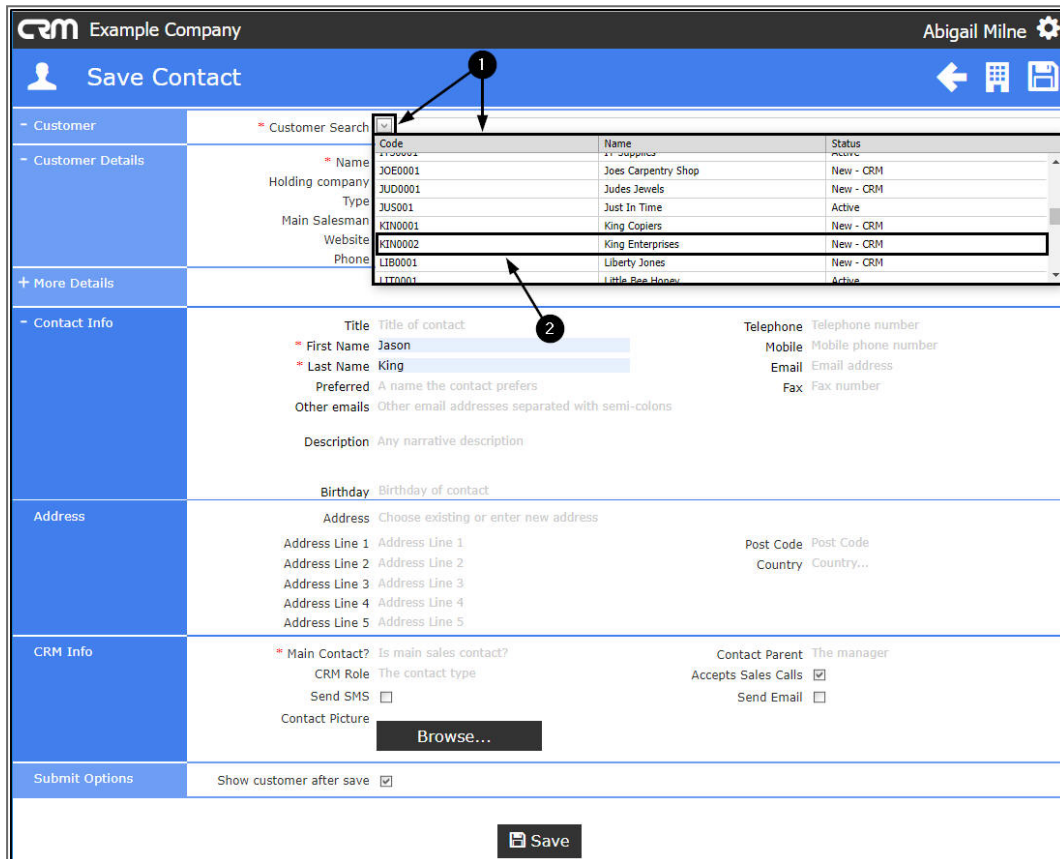
- Customer:** Includes a 'Customer Search' dropdown (callout 1).
- Customer Details:** Includes fields for 'Name' (callout 2), 'Holding company', 'Type', 'Main Salesman', 'Website', 'Phone', 'Reg. No.', 'VAT No.', 'Reporting Area', and 'Rank' (callout 3).
- More Details:** A section for additional information.
- Contact Info:** Includes fields for 'Title', 'First Name', 'Last Name', 'Preferred', 'Other emails', 'Description', 'Telephone', 'Mobile', 'Email', and 'Fax'.
- Address:** Includes fields for 'Address', 'Address Line 1', 'Address Line 2', 'Address Line 3', 'Address Line 4', 'Address Line 5', 'Post Code', and 'Country'.
- CRM Info:** Includes fields for 'Main Contact?', 'CRM Role', 'Send SMS', 'Contact Picture', 'Contact Parent', 'Accepts Sales Calls', and 'Send Email'.
- Submit Options:** Includes a checkbox for 'Show customer after save'.

At the bottom of the form is a 'Save' button.

## CURRENT CUSTOMER

If you are adding the contact details for a **current** customer:

1. Hover over the **Customer Search** field, a drop-down arrow will be revealed. Click on this arrow to display a list of all the customers on the system.
2. Select the relevant customer to be linked to the new contact.



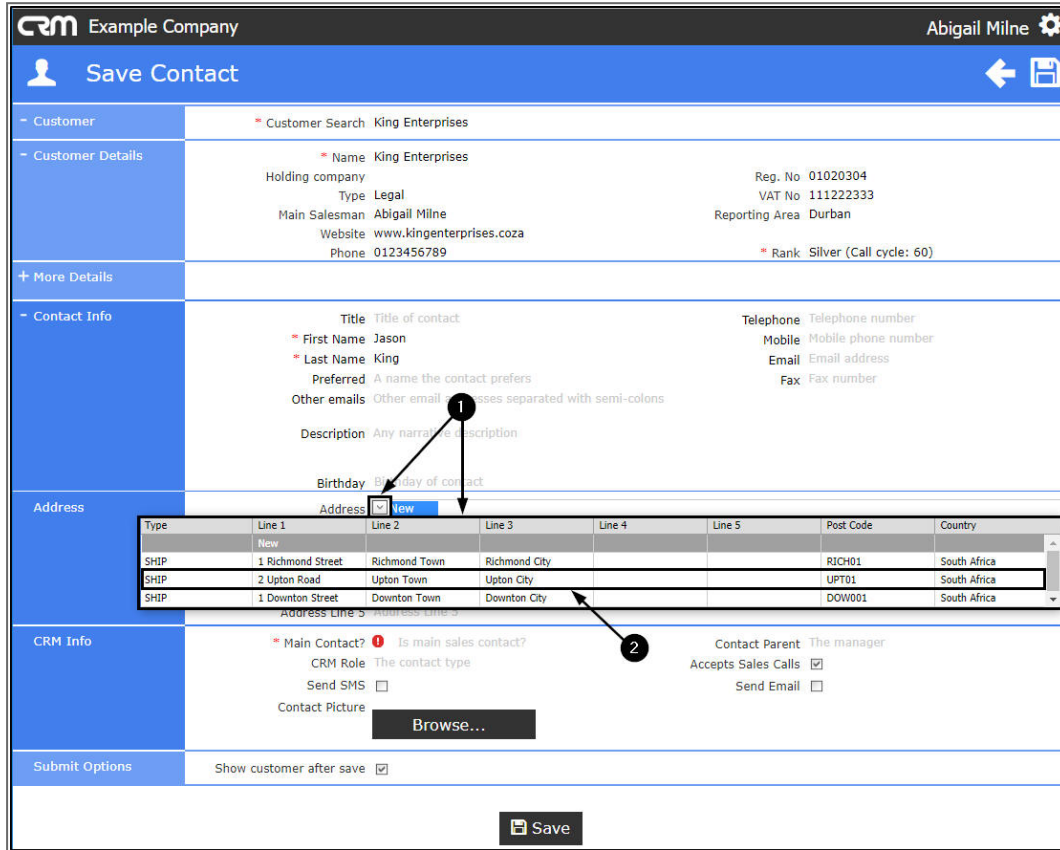
The screenshot shows the 'Save Contact' form in the CRM system. The 'Customer Search' field is highlighted with a red box and a red arrow pointing to it. A dropdown menu is open, showing a list of customers with columns for Code, Name, and Status. The dropdown menu is also highlighted with a red box and a red arrow pointing to it. The form includes sections for Customer Details, Contact Info, Address, CRM Info, and Submit Options.

Code	Name	Status
JOE0001	Joes Carpentry Shop	New - CRM
JUD0001	Judes Jewels	New - CRM
JUS001	Just In Time	Active
KIN0001	King Copiers	New - CRM
KIN0002	King Enterprises	New - CRM
LIB0001	Liberty Jones	New - CRM
LIT0001	Little Bee Honey	Active

## SELECT AN ADDRESS

If this is a current customer already loaded into CRM, you can select an **address**.

1. Hover over the **Address** field, a drop-down arrow will be revealed. Click on this arrow to display a list of all the shipping addresses linked to this customer.
2. Select the relevant address to be linked to the new contact.



**CRM Example Company** Abigail Milne

**Save Contact**

**Customer** \* Customer Search: King Enterprises

**Customer Details**

\* Name: King Enterprises  
 Holding company: Reg. No: 01020304  
 Type: Legal VAT No: 111222333  
 Main Salesman: Abigail Milne Reporting Area: Durban  
 Website: www.kingenterprises.co.za  
 Phone: 0123456789 \* Rank: Silver (Call cycle: 60)

**More Details**

**Contact Info**

Title: Title of contact  
 \* First Name: Jason Telephone: Telephone number  
 \* Last Name: King Mobile: Mobile phone number  
 Preferred: A name the contact prefers Email: Email address  
 Other emails: Other email addresses separated with semi-colons Fax: Fax number  
 Description: Any narrative description  
 Birthday: Birthday of contact

**Address**

Address

Type	Line 1	Line 2	Line 3	Line 4	Line 5	Post Code	Country
SHIP	1 Richmond Street	Richmond Town	Richmond City			RICH01	South Africa
SHIP	2 Upton Road	Upton Town	Upton City			UPT01	South Africa
SHIP	1 Downton Street	Downton Town	Downton City			DOW001	South Africa

**CRM Info**

\* Main Contact? ☐ Is main sales contact?  
 CRM Role: The contact type  
 Send SMS: ☐  
 Contact Picture:   
 Contact Parent: The manager  
 Accepts Sales Calls: ☒  
 Send Email: ☐

**Submit Options**

Show customer after save: ☒

## CREATE A NEW ADDRESS

If the new contact address is not on this list:

1. As you click in the **Address** field ensure that you select **New**.

CRM Example Company

Abigail Milne

Save Contact

← Save

Customer

Customer Search King Enterprises

Customer Details

Name King Enterprises

Holding company

Type Legal

Main Salesman Abigail Milne

Website www.kingenterprises.co.za

Phone 0123456789

Reg. No 01020304

VAT No 111222333

Reporting Area Durban

Rank Silver (Call cycle: 60)

+ More Details

Contact Info

Title Title of contact

First Name Jason

Last Name King

Preferred A name the contact prefers

Other emails Other email addresses separated with semi-colons

Description Any name description

Birthday Birthday of contact

Telephone Telephone number

Mobile Mobile phone number

Email Email address

Fax Fax number

Address

Address

New

Type	Line 1	Line 2	Line 3	Line 4	Line 5	Post Code	Country
	New						
SHIP	1 Richmond Street	Richmond Town	Richmond City			RJCH01	South Africa
SHIP	2 Upton Road	Upton Town	Upton City			UPT01	South Africa
SHIP	1 Downton Street	Downton Town	Downton City			DOW001	South Africa

CRM Info

Main Contact? Is main sales contact?

CRM Role The contact type

Send SMS

Contact Picture Browse...

Contact Parent The manager

Accepts Sales Calls


Send Email


Submit Options




Show customer after save

Save

1. With **New** selected,
2. You can now type in the new address in all the relevant fields


Example Company

Abigail Milne



Save Contact



Customer

Customer Search

King Enterprises

Customer Details

Name

King Enterprises

Holding company

Type

Legal

Main Salesman

Abigail Milne

Website

www.kingenterprises.co.za

Phone

0123456789

Reg. No

01020304

VAT No

111222333

Reporting Area

Durban

Rank

Silver (Call cycle: 60)

More Details

Contact Info

Title

Title of contact

First Name

Jason

Last Name

King

Preferred

A name the contact prefers

Other emails

Other email addresses separated with semi-colons

Description

Any narrative description

Telephone

Telephone number

Mobile

Mobile phone number

Email

Email address

Fax

Fax number

Address

Address

New

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Address Line 5

Post Code

Country

CRM Info

Main Contact?

Is main sales contact?

CRM Role

The contact type

Send SMS

☐

Contact Picture

Browse...

Contact Parent

The manager

Accepts Sales Calls

☒

Send Email

☐

Submit Options

Show customer after save

☒


Save

## THE 'CRM INFO' FRAME.

Move down the page to the **CRM Info** frame.

### MAIN CONTACT

1. Hover over the **Main Contact** field to reveal a drop-down arrow. Click on this arrow to display a drop-down list with the options: **Yes** and **No**.
2. In this example, **Yes** is selected.



CRM Example Company

Abigail Milne

Save Contact

←

📁

Customer

Customer Search

King Enterprises

Customer Details

Name

King Enterprises

Holding company

Legal

Type

Legal

Main Salesman

Abigail Milne

Website

www.kingenterprises.co.za

Phone

0123456789

Reg. No

01020304

VAT No

111222333

Reporting Area

Durban

Rank

Silver (Call cycle: 60)

+ More Details

Contact Info

Title

Title of contact

First Name

Jason

Last Name

King

Preferred

A name the contact prefers

Other emails

Other email addresses separated with semi-colons

Description

Any narrative description

Telephone

Telephone number

Mobile

Mobile phone number

Email

Email address

Fax

Fax number

Address

Birthday

Birthday of contact

Address

New

Address Line 1

10 Main Road

Address Line 2

Main Town

Address Line 3

Main City

Address Line 4

KZN

Address Line 5

Address Line 5

Post Code

MAIN001

Country

South Africa

CRM Info

Main Contact?

1

Yes

No

CRM Role

2

Yes

No

Send SMS

☐

Contact Picture

Browse...

Contact Parent

The manager

Accepts Sales Calls

☒

Send Email

☐

Submit Options

Show customer after save

☒

Save

## CRM ROLE

1. Hover over the **CRM Role** field to reveal a drop-down arrow. Click on this arrow to display a **Contact Type/Role** list.
2. Select from this list the specific role that this contact holds in their company. In this example, **Buying Officer** is selected.

CRM Example Company

Abigail Milne

Save Contact

←

📁

Customer

Customer Search King Enterprises

Customer Details

Name King Enterprises

Holding company

Type Legal

Main Salesman Abigail Milne

Website www.kingenterprises.co.za

Phone 0123456789

Reg. No 01020304

VAT No 111222333

Reporting Area Durban

Rank Silver (Call cycle: 60)

+ More Details

Contact Info

Title Title of contact

First Name Jason

Last Name King

Preferred A name the contact prefers

Other emails Other email addresses separated with semi-colons

Description Any narrative description

Telephone Telephone number

Mobile Mobile phone number

Email Email address

Fax Fax number

Address

Address New

Address Line 1 10 Main Road

Address Line 2 Main Town

Address Line 3 Main City

Address Line 4 KZN

Address Line 5 Address Line 5

Post Code MAIN001

Country South Africa

CRM Info

Main Contact? Yes

CRM Role ☒

Send SMS ☒

Contact Picture

Accounts Manager

Buying Officer

CEO

Chief Financial Officer

End user

Product Advisor

Salesman

Submit Options

Show customer after save

Contact Parent The manager

Accepts Sales Calls ☒

Send Email ☐

Save

- Send SMS** : Select this check box if this contact accepts SMS communication.
- Accept Sales Calls** : Select this check box if this contact accepts sales calls.
  - Note** : This check box is auto selected by the system, you can un-check it, if required.
- Send Email** : Select this check box if this contact accepts Email communication.

CRM Example Company

Abigail Milne

Save Contact

← Save

Customer

Customer Search

King Enterprises

Customer Details

Name

King Enterprises

Holding company

Legal

Type

Legal

Main Salesman

Abigail Milne

Website

www.kingenterprises.coza

Phone

0123456789

Reg. No

01020304

VAT No

111222333

Reporting Area

Durban

Rank

Silver (Call cycle: 60)

+ More Details

Contact Info

Title

Title of contact

First Name

Jason

Last Name

King

Preferred

A name the contact prefers

Other emails

Other email addresses separated with semi-colons

Description

Any narrative description

Telephone

Telephone number

Mobile

Mobile phone number

Email

Email address

Fax

Fax number

Address

Birthday

Birthday of contact

Address

New

Address Line 1

10 Main Road

Address Line 2

Main Town

Address Line 3

Main City

Address Line 4

KZN

Address Line 5

Address Line 5

Post Code

MAIN001

Country

South Africa

CRM Info

Main Contact?

Yes

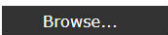
CRM Role

Buying Officer

Send SMS

☐

Contact Picture



Contact Parent

The manager

Accepts Sales Calls

☒

Send Email

☐

Submit Options

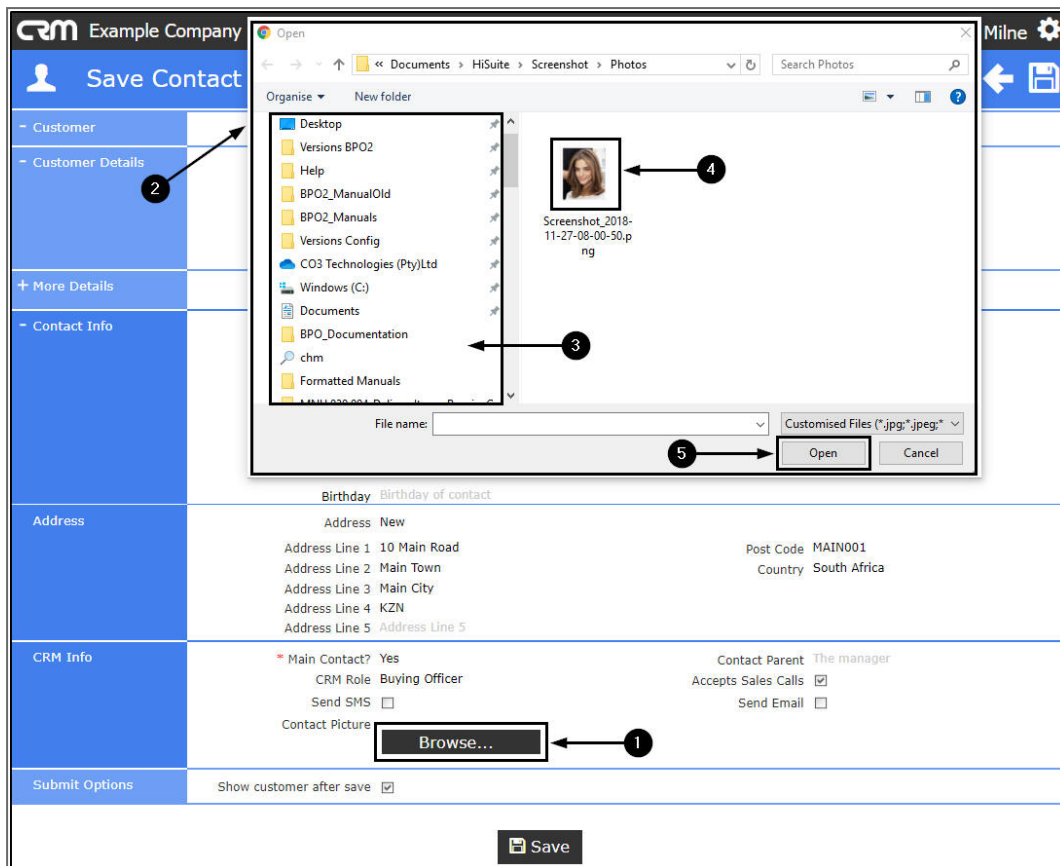
Show customer after save

☒

Save

## LINK A CONTACT PICTURE


1. Click on **Browse...**
2. An **Open** screen will pop up.
3. Double click on the file that contains the image.
4. Click on the image.
5. Click on **Open**.







1. The contact picture will be inserted into this **CRM Info** frame

## CONTACT PARENT

2. Click in this field and type in the '**report to**' person for this contact e.g. the Buying Manager
  - **Note:** If there are Contact Parents set up against this customer, a drop-down arrow will appear as you hover over this field. Click on this arrow to display a list of contact parents from which you can make a selection.


Example Company

Abigail Milne



Save Contact



Customer

Customer Search

King Enterprises

Customer Details

Name

King Enterprises

Holding company

Type

Legal

Main Salesman

Abigail Milne

Website

www.kingenterprises.co.za

Phone

0123456789

Reg. No

01020304

VAT No

111222333

Reporting Area

Durban

Rank

Silver (Call cycle: 60)

+ More Details

Contact Info

Title

Title of contact

First Name

Jason

Last Name

King

Preferred

A name the contact prefers

Other emails

Other email addresses separated with semi-colons

Description

Any narrative description

Telephone

Telephone number

Mobile

Mobile phone number

Email

Email address

Fax

Fax number

Birthday

☒

birthday of contact

Address

Address

New

Address Line 1

10 Main Road

Address Line 2

Main Town

Address Line 3

Main City

Address Line 4

KZN

Address Line 5

Address Line 5

Post Code

MAIN001

Country

South Africa

CRM Info

Main Contact?

Yes

CRM Role

Buying Officer

Send SMS

☐

Contact Picture



Contact Parent

The manager

Accepts Sales Calls

☒

Send Email

☐

Submit Options

Show customer after save

☒

Save

## SUBMIT OPTIONS

### SHOW CUSTOMER AFTER SAVE

1. This check box is auto selected. You can un-select it if you do not wish to view the customer details in the Homepage after you have saved this contact.

## SAVE NEW CONTACT

2. Click on **Save**.

CRM Example Company

Abigail Milne

Save Contact

←

📁

Customer

Customer Search

King Enterprises

Customer Details

Name

King Enterprises

Holding company

Type

Legal

Main Salesman

Abigail Milne

Website

www.kingenterprises.co.za

Phone

0123456789

Reg. No

01020304

VAT No

111222333

Reporting Area

Durban

Rank

Silver (Call cycle: 60)

+ More Details

Contact Info

Title

Title of contact

First Name

Jason

Last Name

King

Preferred

A name the contact prefers

Other emails

Other email addresses separated with semi-colons

Description

Any narrative description

Telephone

Telephone number

Mobile

Mobile phone number

Email

Email address

Fax

Fax number

Address

Address

New

Address Line 1

10 Main Road

Address Line 2

Main Town

Address Line 3

Main City

Address Line 4

KZN

Address Line 5

Address Line 5

Post Code

MAIN001

Country

South Africa

CRM Info

Main Contact?

Yes

CRM Role

Buying Officer

Send SMS

☐

Contact Picture

Browse...

Contact Parent

The manager

Accepts Sales Calls

☒

Send Email

☐

Submit Options

Show customer after save

☒

Save

1. You will either return to the Homepage or Customer Homepage depending on your selection in the previous step.
2. If you selected to 'Show Customer After Save', then you will now be able to view the customer details (e.g. 12 Months Sales History) in this screen as well as customer-specific tiles that are not available in the Main Homepage.

CRM Example Company

Abigail Milne

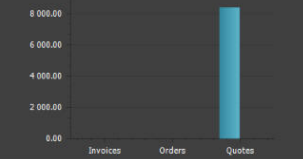
Customer Dashboard

Search

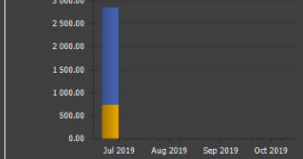
Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Phone call	10000	0	7
Email	0	0	1
Meeting	0	0	0
On Site inspection	0	0	0

1 Month Performance



4 Month Pipeline



create cold call

recommendations

warnings

customers

cases

activities

quotes

orders

invoices

credit notes

equipment

contracts

service calls

3rd party

files

King Enterprises - KIN0002

Trading Name

Registered Name

Description

VAT No

Registration

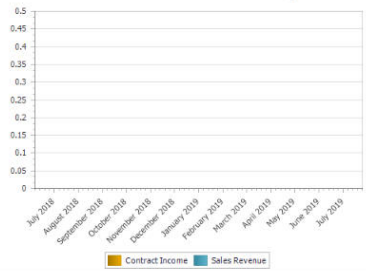
Rank

Website

Phone

50%

12 Months Sales History



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CO3 TECHNOLOGIES

CRM.000.005

