

# CRM BASICS

## ACTION BUTTONS AND INFORMATION TILES

The customers that you can view in CRM will be:

- the customers where you are the **main salesperson** or
- the customers where you are **linked** as a salesperson.

This list may include current BPO customers or **New - CRM customers**.

In the **Customers** listing page you can view and access the following customer **Actions** buttons:

- **Edit Customer**
- **Add Contact**
- **Add Third Party**
- **Add Note**
- **Maintain Customer Salesmen**
- **New Activity**
- **New Quote**
- **Release Customer** (New CRM Customers only)

In the **Customer Dashboard** (Customer Home page) you can view and access all the **Actions** buttons as listed above as well as the:

- **Create Cold Call for Customer**

You can also access the following customer **Information** tiles:

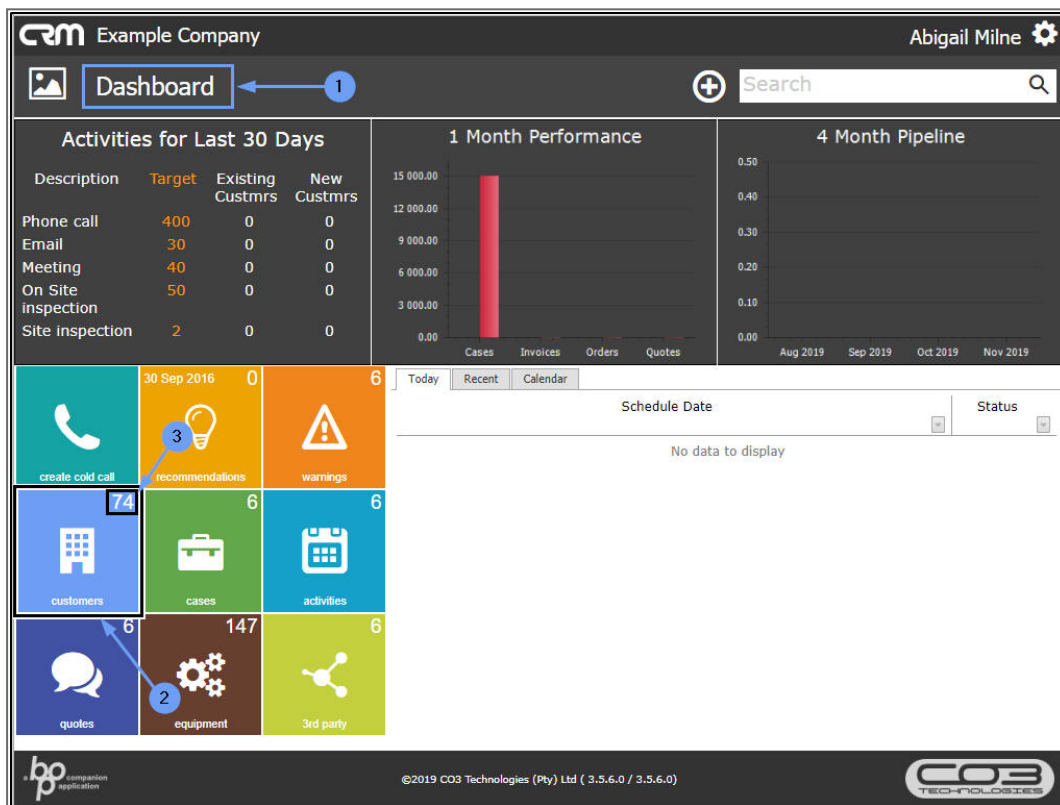
- **Sales**
- **Addresses**
- **Contacts**
- **Open Activities**

- Notes
- Salesmen

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

## VIEW CUSTOMER LIST

1. In the **Homepage**,
2. Click on the **Customers** tile.
3. **Note:** The number in the top left of the tile indicates how many customers that you are linked to.



1. The **Customers** listing page will open.
  - Here you can view all the customers where you are either the **main** salesperson or **linked** as a salesperson.

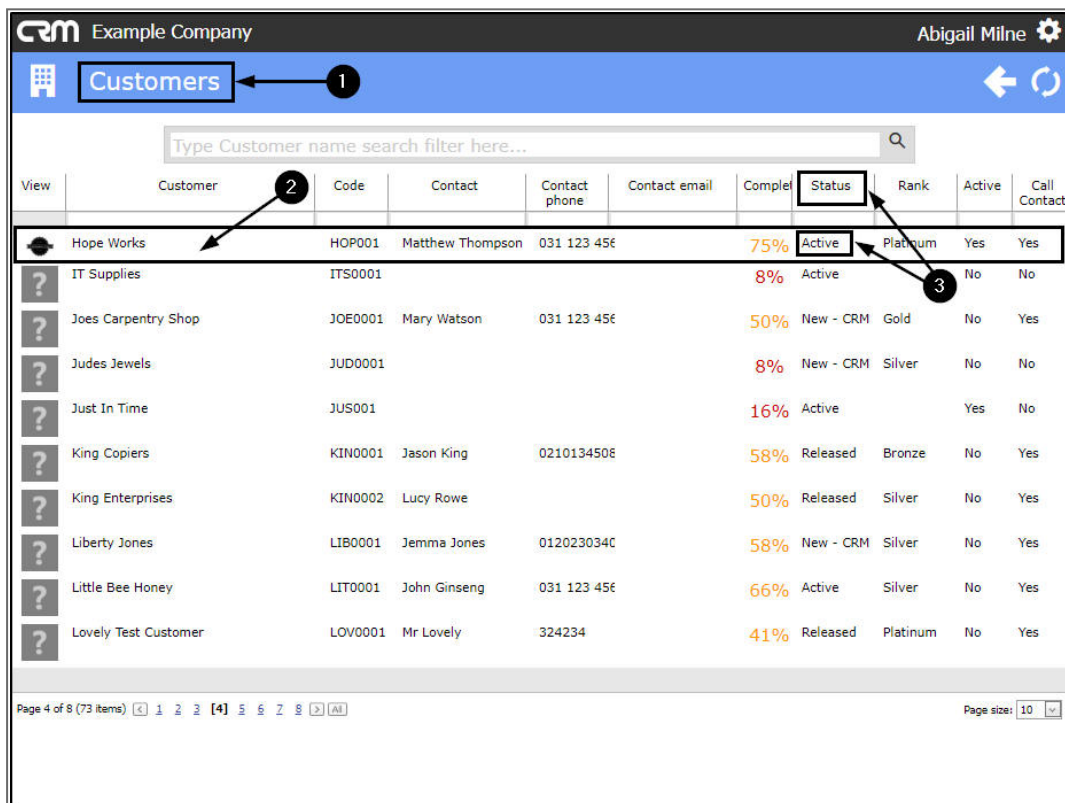
## CUSTOMER ACTION BUTTONS

2. **Hover over** a selected customer.
  - In this example, **Hope Works** has been selected.

## ACTIVE OR RELEASED

Note on Customer Status **Active** or **Released**

3. You will note that the **status** of this customer is **Active**. The Actions buttons that are available (shown in the next image) will depend on the **status** of the selected customer.



View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
	Hope Works	HOP001	Matthew Thompson	031 123 456		75%	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%	Released	Silver	No	Yes
	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	New - CRM	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

1. As you hover over an **Active** or **Released** customer,
2. the following **Actions buttons** will be displayed:

- Edit Customer
- Add Contact
- Add Third Party
- Add Note
- Maintain Customer Salesmen
- New Activity
- New Quote

CRM Example Company Abigail Milne

**Customers**

Type Customer name search filter here...

View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
?	Hope Works	HOP001	Matthew Thompson	031 123 456		75%	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	0210134506		58%	Released	Bronze	No	Yes
?	King Enterprises	KIN0002	Lucy Rowe			50%	Released	Silver	No	Yes
?	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	New - CRM	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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localhost:50000/BPOCRM/AddNote.aspx?CustomerID=2

## NEW - CRM

1. If you selected a customer that is in status **New - CRM** then you will note an additional Action button:
2. **Release Customer** (for approval in BPO)

CRM Example Company Abigail Milne

**Customers**

Type Customer name search filter here...

View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
	Hope Works	HOP001	Matthew Thompson	031 123 456		75%	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%	Released	Silver	No	Yes
	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	New - CRM	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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localhost:50000/BPOCRM/ReleaseCustomer.aspx?CustomerID=77

## CUSTOMER HOME PAGE

To view both the customer **Actions buttons** and the customer **Information tiles** in the same screen - you will need to navigate to the **Customer Dashboard**.

1. In the **Customers** listing page, click on the selected customer icon in the **View** column.
2. In this example, **Liberty Jones** has been selected.

CRM Example Company

Abigail Milne

Customers

Type Customer name search filter here...

View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
	Hope Works	HOP001	Matthew Thompson	031 123 456		75%	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%	Released	Silver	No	Yes
	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	New - CRM	Silver	No	Yes
		LIT0001	John Ginseng	031 123 456		66%	Active	Silver	No	Yes
		LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes

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[All](#)

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1. The selected **Customer Dashboard** will open.

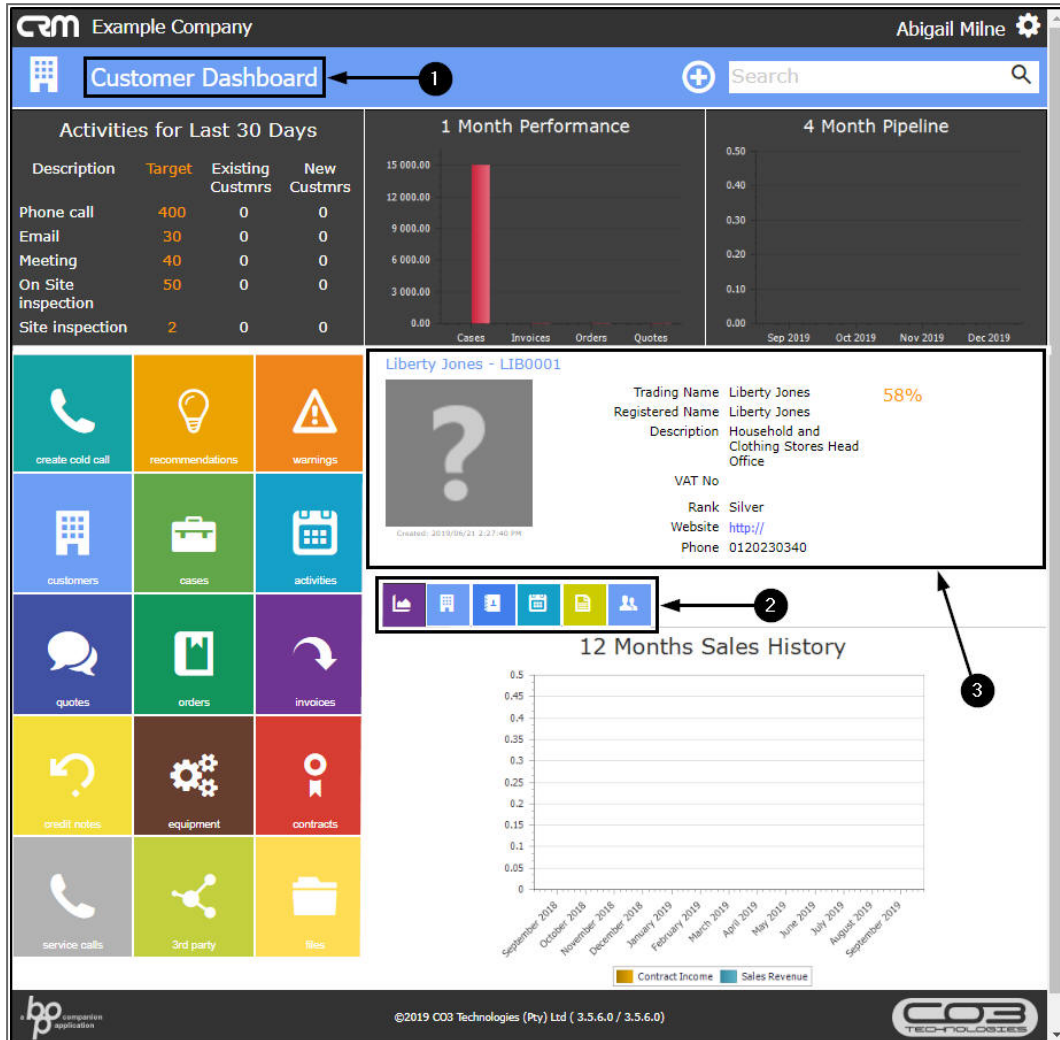
## CUSTOMER INFORMATION TILES

2. The customer **Information tiles** are displayed directly on this page:

- Sales
- Addresses
- Contacts
- Open Activities
- Notes
- Salesmen

## CUSTOMER ACTION BUTTONS

- To view the customer **Action** buttons hover anywhere in the customer information frame.

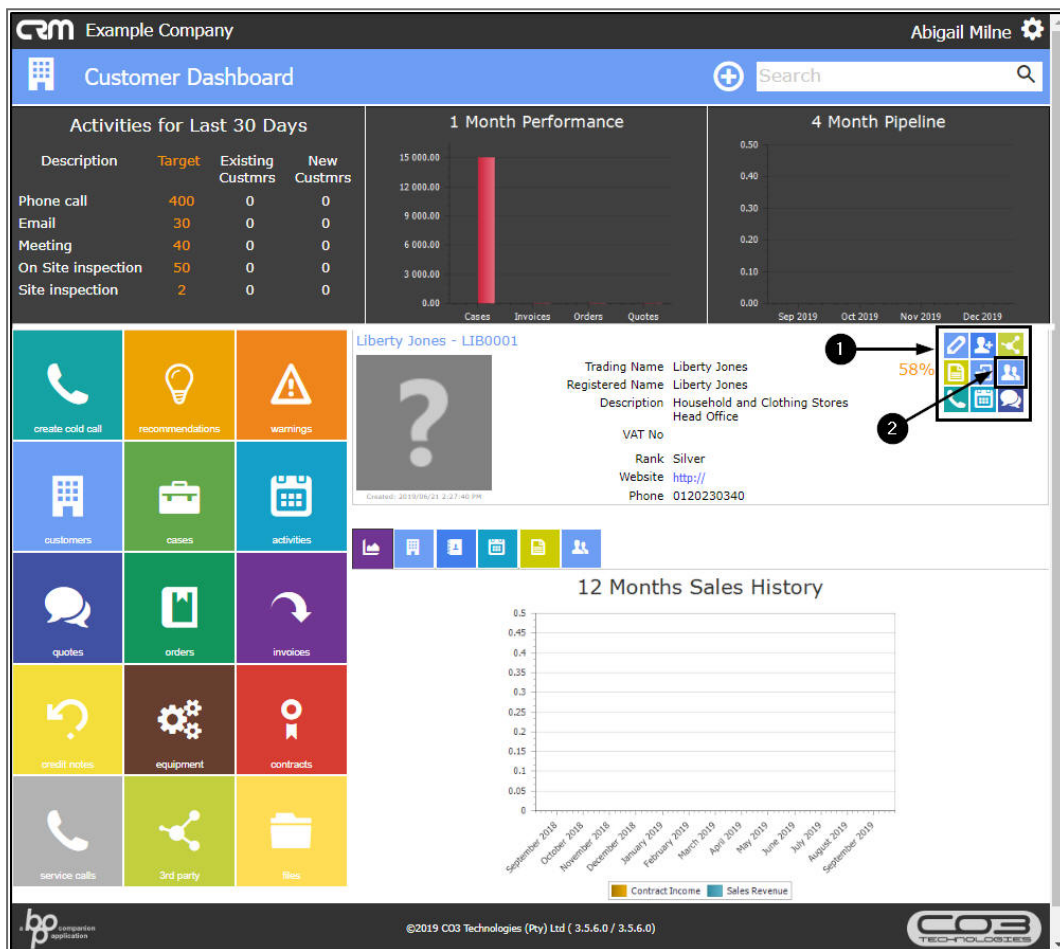


- The customer **Actions Buttons** will then be displayed:

- Edit Customer
- Add Contact
- Add Third Party
- Add Note

- **Maintain Customer Salesmen**
- **Create Cold Call for Customer** (this button is only available from the Customer Home page)
- **New Activity**
- **New Quote**
- **Release Customer** (this button is only available for **New - CRM customers**)

2. Click on any of these buttons to direct you to the relevant **Action page**.



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