

# **CRM BASICS**

## SEARCH CUSTOMER/CLIENT

You can search for a customer using the Customer Name, Trading Name or Registered Name. Just type all or part of the text that you are looking for and press **Enter** on your keyboard or click on the **Search** icon.

You can also search for a customer by Contact Name.

**Ribbon Access:** Webpage > http://[servername]:[portno]/BPOCRM/User.aspx

1. You can either access the *Search Bar* from the *Homepage*.

BPO2 Test Environment     Dashboard		Judith Mudzengi ♥ ● Search Q
Activities for Last 30 Days Description Target Existing New Custmrs Custmrs Nactory to display	Performance	Pipeline
V among the second and the second	Schedule Data	Cell: Bur: 031 122 4567 Page 189 10
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2. or from the *Customer Homepage*.





#### SEARCH FROM THE HOMEPAGE

For the purpose of this manual, we will work from the *Homepage*.

- 1. In the *Search Bar*, type in the search query or Customer Name or Trading Name or Registered Name or Customer Contact .
- 2. Click on the *Search icon*.



BPO2 Test Environment		Judith Mudzengi 🍄
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Dashboard Activities for Last 30 Days Description Target Existing New Custmrs Nothing to display	Performance 1.00 0.40 0.40 0.20	Pipeline 1
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quotes	©2019 CO3 Technologies (Pky) Ltd ( 3.5.5.1 / 3.5.5.1)	

The *Search Results* screen will be displayed.

- 1. All the customers that have the 'search' word in their customer name / customer contact / trading name / registered name will be displayed.
- 2. The system will show which part of the 'search' word was found during the search on each result.



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	ho					۹		*
	Customer Name	×	Contact Name	Tel No	Mobile No	1	Found Words	×
	John <u>Holland</u> , Build Construction ( Tel: 031456789 Accepts sales calls: Yes Email: Salesman: Judith Mudzengi <u>Found: he</u>					Celli	0	
75%	John Smith, <u>Hope Works (HOP000</u> Tel: 031 123 4567 Accepts sales calls: Yes Email: john@email.coza Salesman: Abigail Milne <u>Found: Inc</u>					Cell:		
50%	Another Person, 24 Hour HCCP (7: Tel: 345678 Accepts sales calls: Yes Email: Salesman: Pam Pillay Found: Ing Accounts , Financial Mgmt Homog	-0				Cell:		
25%	Tel: 031 137 1371 Accepts sales calls: Yes Email: Accounts@custome Salesman: Judith Mudzengi <u>Found: ho</u>	er5956.com		Cell: 083 137 1371				
25%	Pieter <u>Ho</u> epfner, KANEBO COSMET Tel: 031 131 1315 Accepts sales calls: Yes Email: Pieter@customer58 Salesman: Judith Mudzengi Found: ho	854.com		Cell: 083 131 1315				
	Heidi Hafner, Product Photobug (7 Tel: 031 020 0201 Accepts sales calls: Yes Email: Heidi@customer57 Salesman: Judith Mudzengi Found: Inc	'89.com		Cell: 083 020 0201				
	Tania Van Wyk, P <u>ho</u> tolist Switchab Tani 031 263 2626 Accepts sales calls: Ver Salesman: Judith Mudzengi <u>Foundi Inn</u>			Cell: 083 263 2626				-

- 1. You can also type in multiple words in the *Search Bar* to refine your search.
- All the customers that have any part of the 'search' word(s) in their customer name / customer contact / trading name / registered name will be displayed. The search engine will list the 'closest' match(es) higher on the list to help you find the contact you are looking for.
- 3. The system will show which part of the 'search' word(s) was found during the search on each result.



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-	Customer Name	Contact Name	W	Tel No	Mobile No	×	Found Words	
<u> </u>	Tel: Accepts sales calls: Email: Salesman:	e Works (HOP0001) 031 Yes john@email.coza Abigal Mine 001 hops 3			1	Cell		20
<b>—</b>	Tel: Accepts sales calls: Email:	theresa@noemail.com Judith Mudzengi		Cell: (	)61 512 415			
<b>—</b>	Tel: Accepts sales calls: Email:	Johan@customer5773.com Judith Mudzengi		Cell: 0	183 039 0388			
<u> </u>	Tel: Accepts sales calls: Email:	Makos@customer5753.com Judith Mudzengi		Cell: 0	183 312 3122			
<b>—</b>	Tel: Accepts sales calls: Email:	Lizelle@customer5773.com Judith Mudzengi		Cell: (	183 039 0388			Ŧ

• Click on the on the item you wish to view more details for.

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-	Customer Name	Contact Name Tel No Mobile No		Found Words						
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75%	Accepts sales calls: Email: Salesman:		Cell							
<b>오</b> 75%	Tel: Accepts sales calls: Email:	theresa@noemail.com Judith Mudzengi								
<b>—</b>	Tel: Accepts sales calls: Email:	Johan@customer5773.com Judith Mudzengi								
<b>2</b> 5%	Tel: Accepts sales calls: Email:	Makos@customer5753.com Judith Mudzengi								
25%	Tel: Accepts sales calls: Email:	Yozio Heuristic (71505514) 031 783 7832 Cell: 083 783 7832 Yes Ralick Dawood@customer5938.com Judith Mudzengi								

• More details of the item will be displayed.



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		hope wo					۹		*
	Customer Name	Contact Name	w	Tel No	Mobi	ile No		Found Words	
75%	Accepts sales calls: Email: Salesman: Address:	031 123 4567 Yes Abigail Withe Sc Lavender Road Yew Town Forest Hills Durban 1234					Cell:		
<b>오</b> 75%	Tel: 0 Accepts sales calls: 1 Email: 1	theresa@noemail.com Judith Mudzengi		Cell:	061 512 415				00
<b>2</b> 5%	Tel: ( Accepts sales calls: Email: :	Johan@customer5773.com Judith Mudzengi		Cell:	083 039 0388				
<b></b>	Tel: 0 Accepts sales calls: 2 Email: 1	Makos@customer5753.com Judith Mudzengi		Cell:	063 312 3122				÷

• Click on the *View* icon of the customer you wish to observe.

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Ļ	Customer Name	Contact Name	v	Tel No	w	Mobile No	-	Found Words	v	
75%	Tel: Accepts sales calls: Email: Salesman:	Works (HOP0001) 031 123 4567 Yes john@email.coza Abigal Milne wo hope					Cell			
<b>오</b> 75%	Tel: Accepts sales calls: Email:	theresa@noemail.com Judith Mudzengi			Cell: 061 512 415					
<u> </u>	Tel: Accepts sales calls: Email:	Johan@customer5773.com Judith Mudzengi		9	Cell: 083 039 0388					
<u> </u>	Tel: Accepts sales calls: Email:	Makos@customer5753.com Judith Mudzengi			Cell: 083 312 3122					
<b>—</b>	Tel: Accepts sales calls: Email:	Rafick Dawood@customer5938.com Judith Mudzengi			Cell: 083 783 7832				*	

The *Customer Homepage* will be displayed.



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Description		or Last 30 D. Existing Custmrs ing to display	New	Performance	Pipeline Fetching data					
create cold call	recommendations	A warmings	Hope Works - HOP00	Trading Name Hope Works Registered Name Hope Works Description VAT No		75%				
customers	<b></b>	activities	Countre: 2270/11/18 0.22.45 AM	Rank Silver Webste http:/// Phone 031 123 4567						
Quotes	orders	invoices		12 Months Sales History						
sredit notes	equipment	Contracts		123 12 12 12 12 12 13 14 13 14						
service calls	K 3rd party	fies		225	5 <sup>6</sup>					
. <b>bo</b>				©2019 CO3 Technologies (Phy) Ltd ( 3.5.5.1 / 3.5.5.1)						

- Hover over an item.
- The following action items will be displayed:
  - 1. View / Edit this Contact
  - 2. Create a new case and activity for this contact

**Note:** You can only view / edit a contact or create a new case and activity for customers where **(a)** you are the main salesman or linked salesmen, and **(b)** where the customer has addresses configured.



### Search Customer

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-	Customer Name	Contact Name	×	Tel No	v	Mobile No		Found Words	w
75%	Tel: Accepts sales calls: Email: Salesman:	Works (HOP0001) 031 123 4567 Yes John@email.coza Abigal Milne wo hope					Cell		
<b>오</b> 75%	Tel: Accepts sales calls: Email:	theresa@noemail.com Judith Mudzengi		Cell:	061 512 415				
<b>2</b> 5%	Tel: Accepts sales calls: Email:	Johan@customer5773.com Judith Mudzengi		Cell:	083 039 0388				
<b>2</b> 5%	Tel: Accepts sales calls: Email:	Makos@customer5753.com Judith Mudzengi		Cell:	083 312 3122				
25%	Tel: Accepts sales calls: Email:	Rafick Dawood@customer5938.com Judith Mudzengi		Cell:	083 783 7832				*

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