

CRM BASICS

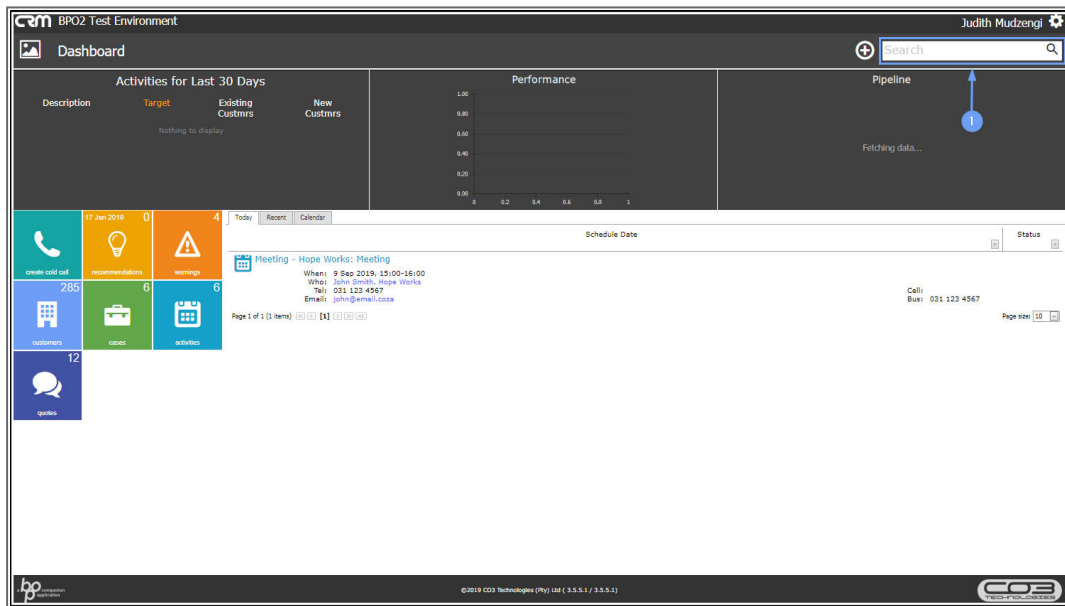
SEARCH CUSTOMER/CLIENT

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.

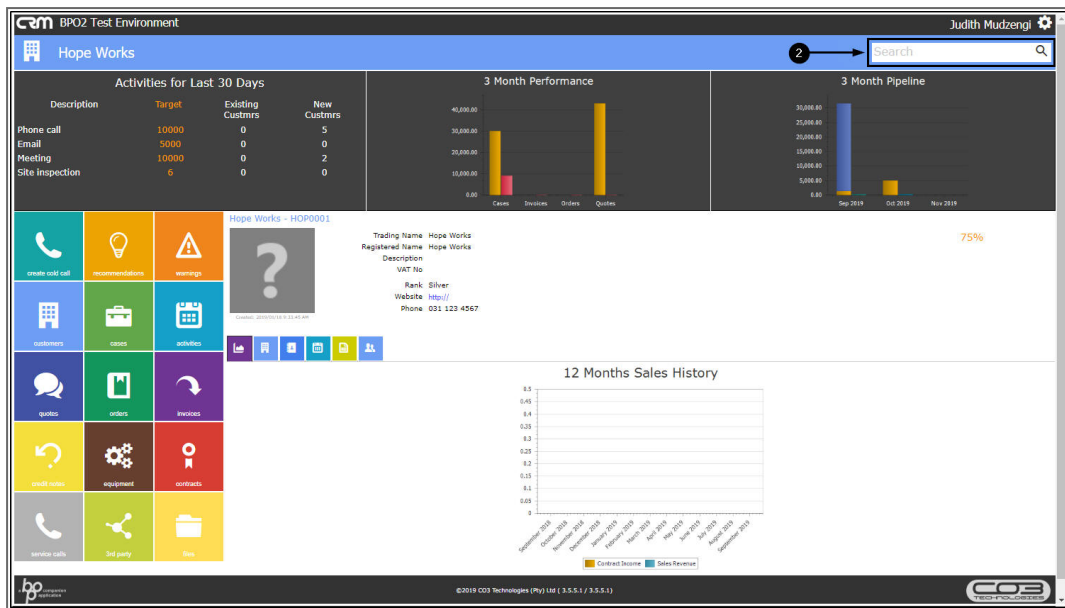
You can also search for a customer by Contact Name.

Ribbon Access: Webpage > [http://\[servername\]:\[port-no\]/BPOCRM/User.aspx](http://[servername]:[port-no]/BPOCRM/User.aspx)

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



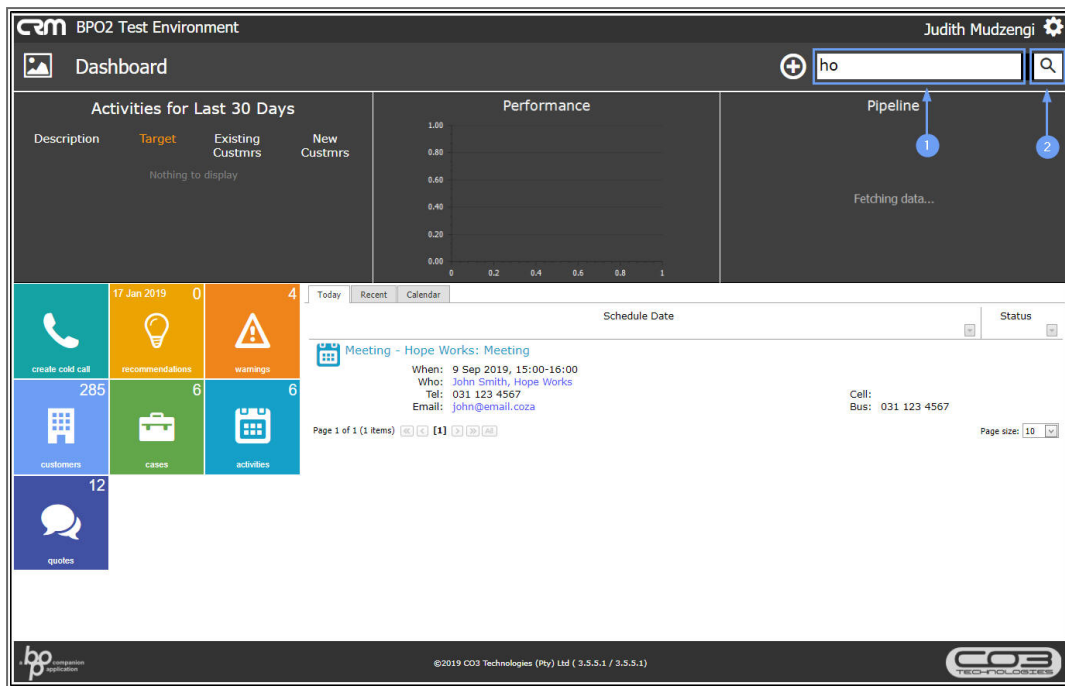
2. or from the **Customer Homepage**.



SEARCH FROM THE HOMEPAGE

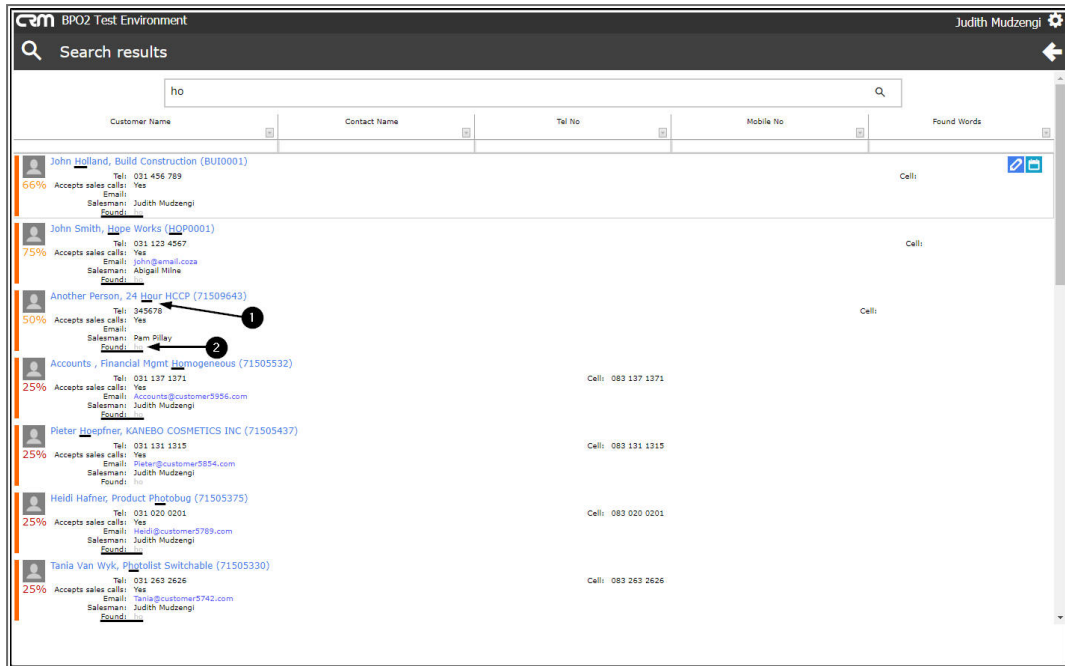
For the purpose of this manual, we will work from the *Homepage*.

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**.



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.



1. You can also type in multiple words in the **Search Bar** to refine your search.
2. 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.

CRM BPO2 Test Environment Judith Mudzengi

Search results

hope wor

Customer Name	Contact Name	Tel No	Mobile No	Found Words
John Smith, Hope Works (HOP0001)	75% Accepts sales calls: Yes Email: john@email.co.za Salesman: Abigail Milne Found: www.hopworks.co.za	031		Cell:
Theresa Wheeler, JIRA Networked (71505555)	75% Accepts sales calls: Yes Email: theresa@noemail.com Salesman: Judith Mudzengi Found: www.jira.com	031 215 415	061 512 415	
Johan van Staden, Framework HCFA (71505361)	25% Accepts sales calls: Yes Email: Johan@customer5773.com Salesman: Judith Mudzengi Found: www.framework.co.za	031 039 0388	083 039 0388	
Makos, Alliance IAR Embedded Workbench (71505341)	25% Accepts sales calls: Yes Email: Makos@customer5753.com Salesman: Judith Mudzengi Found: www.alliance.co.za	031 312 3122	083 312 3122	
Lizelle Bairstow, Framework HCFA (71505361)	25% Accepts sales calls: Yes Email: Lizelle@customer5773.com Salesman: Judith Mudzengi Found: www.framework.co.za	031 039 0388	083 039 0388	

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

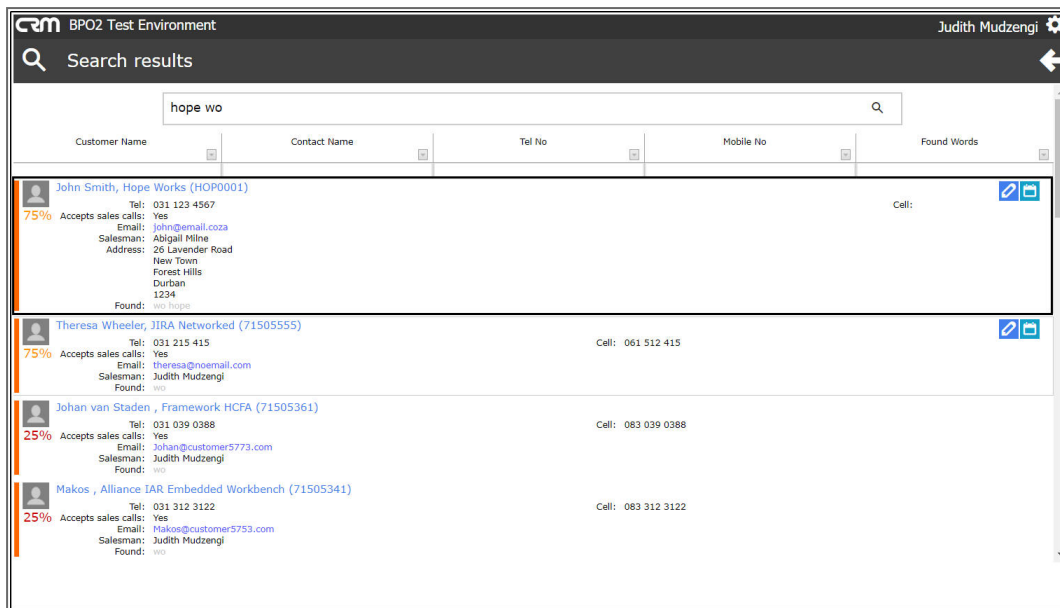
CRM BPO2 Test Environment Judith Mudzengi

Search results

hope wo

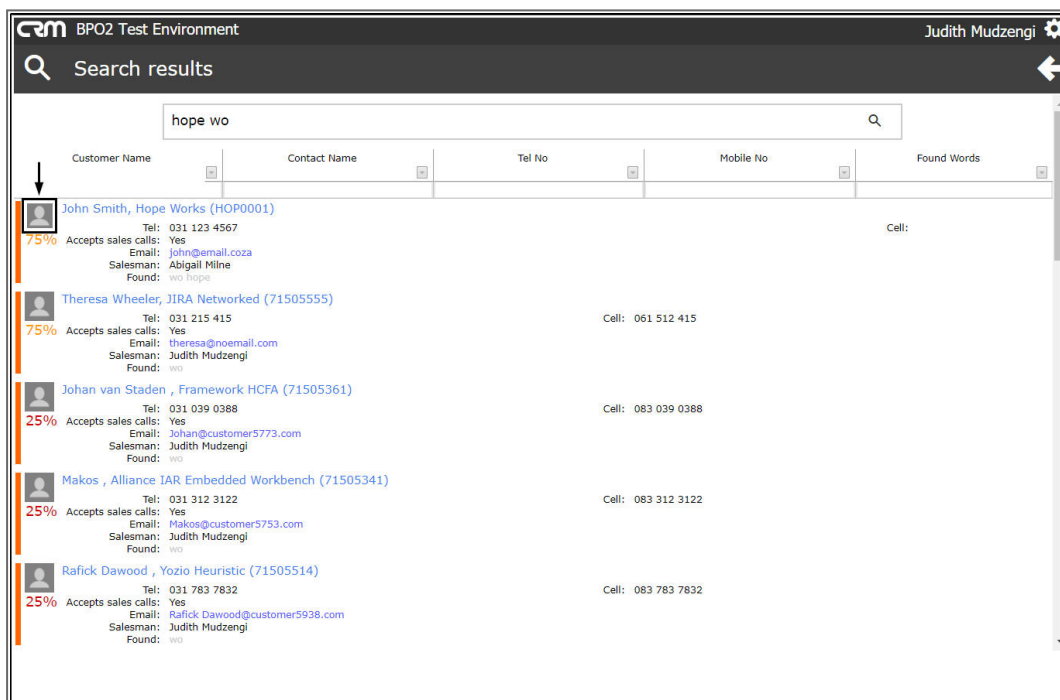
Customer Name	Contact Name	Tel No	Mobile No	Found Words
John Smith, Hope Works (HOP0001)	75% Accepts sales calls: Yes Email: john@email.co.za Salesman: Abigail Milne Found: www.hopworks.co.za	031 123 4567		Cell:
Theresa Wheeler, JIRA Networked (71505555)	75% Accepts sales calls: Yes Email: theresa@noemail.com Salesman: Judith Mudzengi Found: www.jira.com	031 215 415	061 512 415	
Johan van Staden, Framework HCFA (71505361)	25% Accepts sales calls: Yes Email: Johan@customer5773.com Salesman: Judith Mudzengi Found: www.framework.co.za	031 039 0388	083 039 0388	
Makos, Alliance IAR Embedded Workbench (71505341)	25% Accepts sales calls: Yes Email: Makos@customer5753.com Salesman: Judith Mudzengi Found: www.alliance.co.za	031 312 3122	083 312 3122	
Rafick Dawood, Yozio Heuristic (71505514)	25% Accepts sales calls: Yes Email: Rafick Dawood@customer5938.com Salesman: Judith Mudzengi Found: www.yozio.co.za	031 783 7832	083 783 7832	

- More details of the item will be displayed.



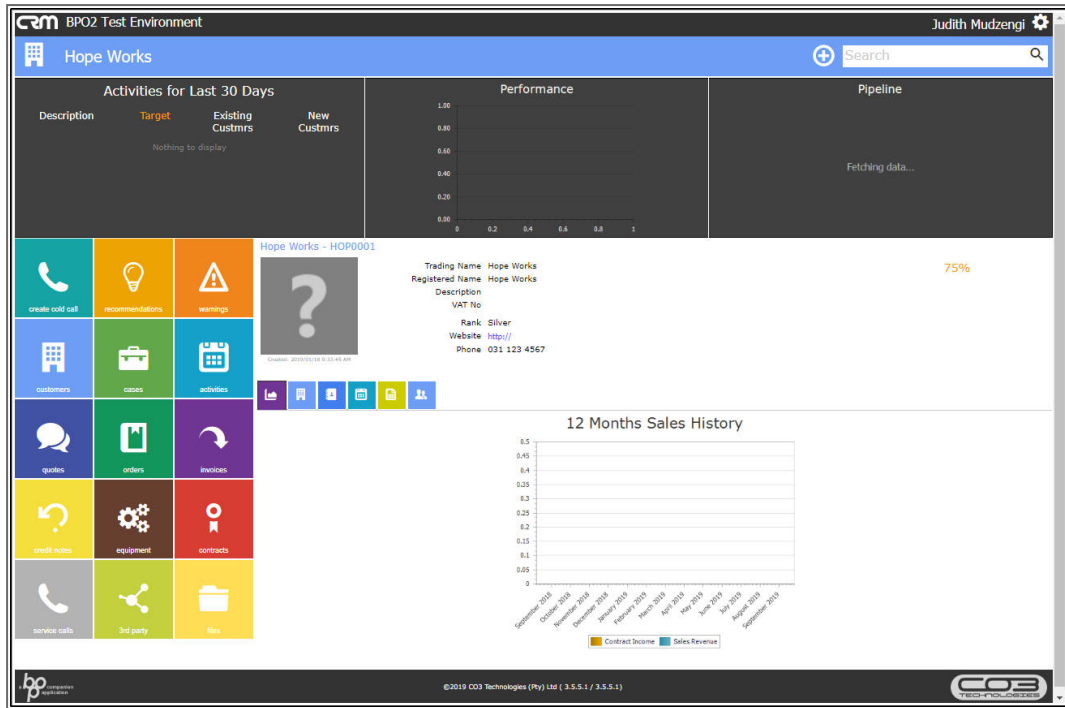
Customer Name	Contact Name	Tel No	Mobile No	Found Words
John Smith, Hope Works (HOP0001)	Tel: 031 123 4567 Accepts sales calls: Yes Email: john@email.co.za Salesman: Abigail Milne Address: 26 Lavender Road New Town Forest Hills Durban 1234 Found: wo hope			Cell:
Theresa Wheeler, JIRA Networked (71505555)	Tel: 031 215 415 Accepts sales calls: Yes Email: theresa@noemail.com Salesman: Judith Mudzengi Found: wo		Cell: 061 512 415	
Johan van Staden, Framework HCFA (71505361)	Tel: 031 039 0388 Accepts sales calls: Yes Email: johan@customer5773.com Salesman: Judith Mudzengi Found: wo		Cell: 083 039 0388	
Makos, Alliance IAR Embedded Workbench (71505341)	Tel: 031 312 3122 Accepts sales calls: Yes Email: Makos@customer5753.com Salesman: Judith Mudzengi Found: wo		Cell: 083 312 3122	

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



Customer Name	Contact Name	Tel No	Mobile No	Found Words
John Smith, Hope Works (HOP0001)	Tel: 031 123 4567 Accepts sales calls: Yes Email: john@email.co.za Salesman: Abigail Milne Found: wo hope			Cell:
Theresa Wheeler, JIRA Networked (71505555)	Tel: 031 215 415 Accepts sales calls: Yes Email: theresa@noemail.com Salesman: Judith Mudzengi Found: wo		Cell: 061 512 415	
Johan van Staden, Framework HCFA (71505361)	Tel: 031 039 0388 Accepts sales calls: Yes Email: johan@customer5773.com Salesman: Judith Mudzengi Found: wo		Cell: 083 039 0388	
Makos, Alliance IAR Embedded Workbench (71505341)	Tel: 031 312 3122 Accepts sales calls: Yes Email: Makos@customer5753.com Salesman: Judith Mudzengi Found: wo		Cell: 083 312 3122	
Rafick Dawood, Yozio Heuristic (71505514)	Tel: 031 783 7832 Accepts sales calls: Yes Email: Rafick.Dawood@customer5938.com Salesman: Judith Mudzengi Found: wo		Cell: 083 783 7832	

The **Customer Homepage** will be displayed.



- 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.

CRM BPO2 Test Environment

Judith Mudzengi

Search results

hope wo

Customer Name	Contact Name	Tel No	Mobile No	Found Words
<div>John Smith, Hope Works (HOP0001)</div> <div>75%</div> <div> <div>Tel: 031 123 4567</div> <div>Accepts sales calls: Yes</div> <div>Email: john@email.co.za</div> <div>Salesman: Abigail Milne</div> <div>Found: wo hope</div> </div>				Cell:
<div>Theresa Wheeler, JIRA Networked (71505555)</div> <div>75%</div> <div> <div>Tel: 031 215 415</div> <div>Accepts sales calls: Yes</div> <div>Email: theresa@noemail.com</div> <div>Salesman: Judith Mudzengi</div> <div>Found: wo</div> </div>			Cell: 061 512 415	
<div>Johan van Staden, Framework HCFA (71505361)</div> <div>25%</div> <div> <div>Tel: 031 039 0388</div> <div>Accepts sales calls: Yes</div> <div>Email: johan@customer5773.com</div> <div>Salesman: Judith Mudzengi</div> <div>Found: wo</div> </div>			Cell: 083 039 0388	
<div>Makos, Alliance IAR Embedded Workbench (71505341)</div> <div>25%</div> <div> <div>Tel: 031 312 3122</div> <div>Accepts sales calls: Yes</div> <div>Email: Makos@customer5753.com</div> <div>Salesman: Judith Mudzengi</div> <div>Found: wo</div> </div>			Cell: 083 312 3122	
<div>Rafick Dawood, Yozio Heuristic (71505514)</div> <div>25%</div> <div> <div>Tel: 031 783 7832</div> <div>Accepts sales calls: Yes</div> <div>Email: Rafick Dawood@customer5938.com</div> <div>Salesman: Judith Mudzengi</div> <div>Found: wo</div> </div>			Cell: 083 783 7832	

CRM.000.016