

CRM CUSTOMERS

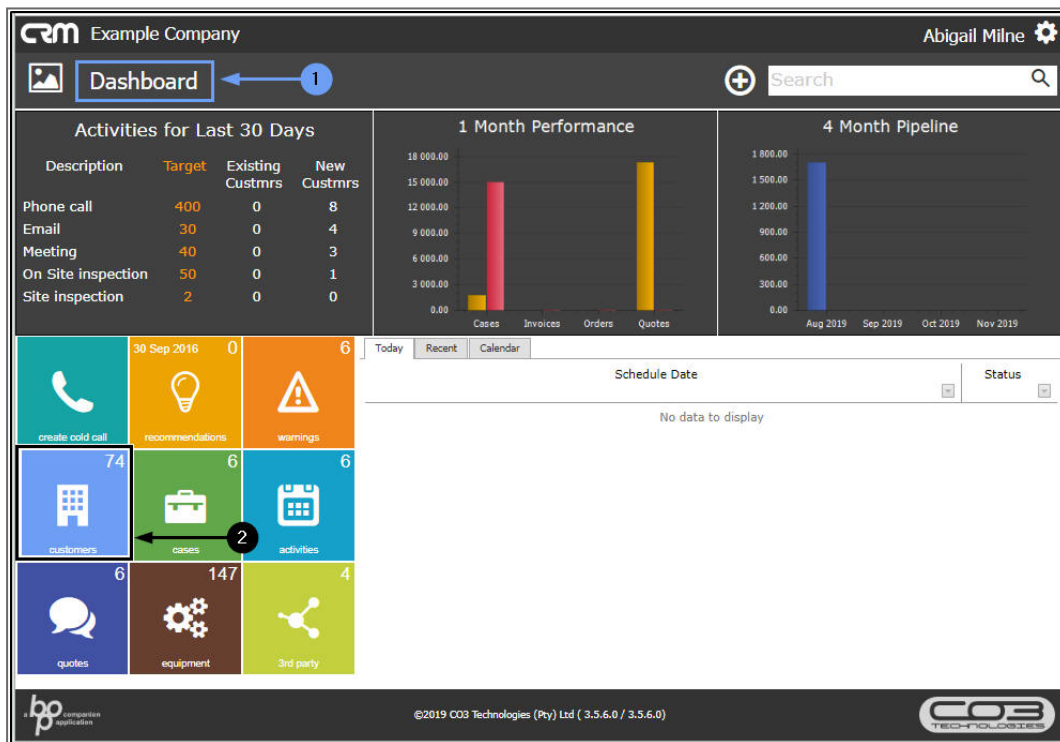
CONTRACTS

In CRM you can view Contract Performance Reports for customer machines that are on contract.

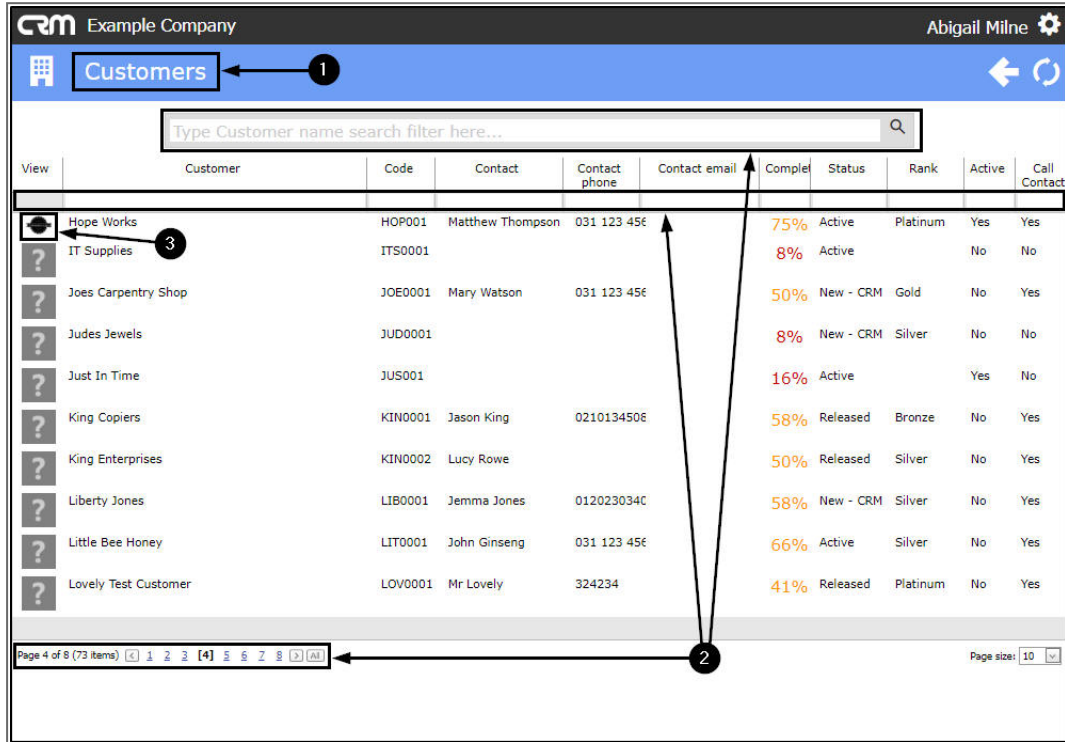
Ribbon Access: Webpage > [http://\[servername\]:\[port-no\]/BPOCRM/User.aspx](http://[servername]:[port-no]/BPOCRM/User.aspx)

SELECT CUSTOMER

1. In the **Dashboard** (Home page) screen,
2. Click on the **Customers** tile.



1. The **Customers** page will open.
2. Use the **Page Reference** field, **Filter Row** or **Filter Text Box** to find the applicable customer.
3. Click on the selected **Customer icon** in the **View** column.



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

Page 4 of 8 (73 items) [1] [2] [3] [4] [5] [6] [7] [8] [9] [All] Page size: 10

1. The **Customer Dashboard** (Customer Home page) will open.
2. Click on the **Contracts** tile.



THE CONTRACTS FOR [CUSTOMER NAME] PAGE

1. The **Contracts for [Customer Name]** page will open.

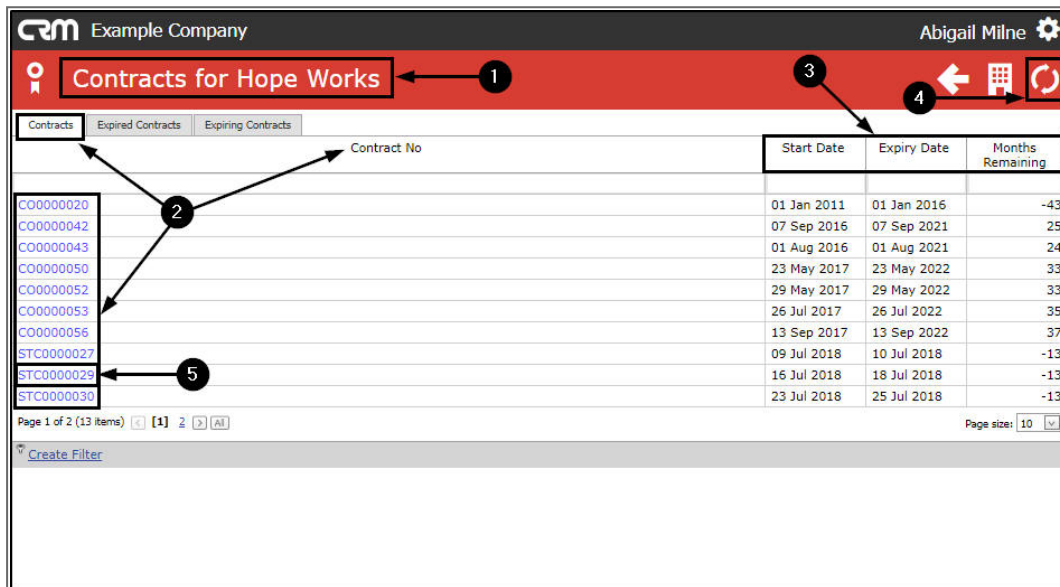
VIEW ALL CONTRACTS

2. The **Contracts** tab will be at the fore which lists, by **Contract No**, all contracts linked to this customer.
3. In this data grid you can view the:
 - **Start Date**,
 - **Expiry Date** and
 - **Months Remaining** for each listed contract.

- Click on the Refresh button at any time to bring the data up to date (if any changes have been made in BPO2, for example).

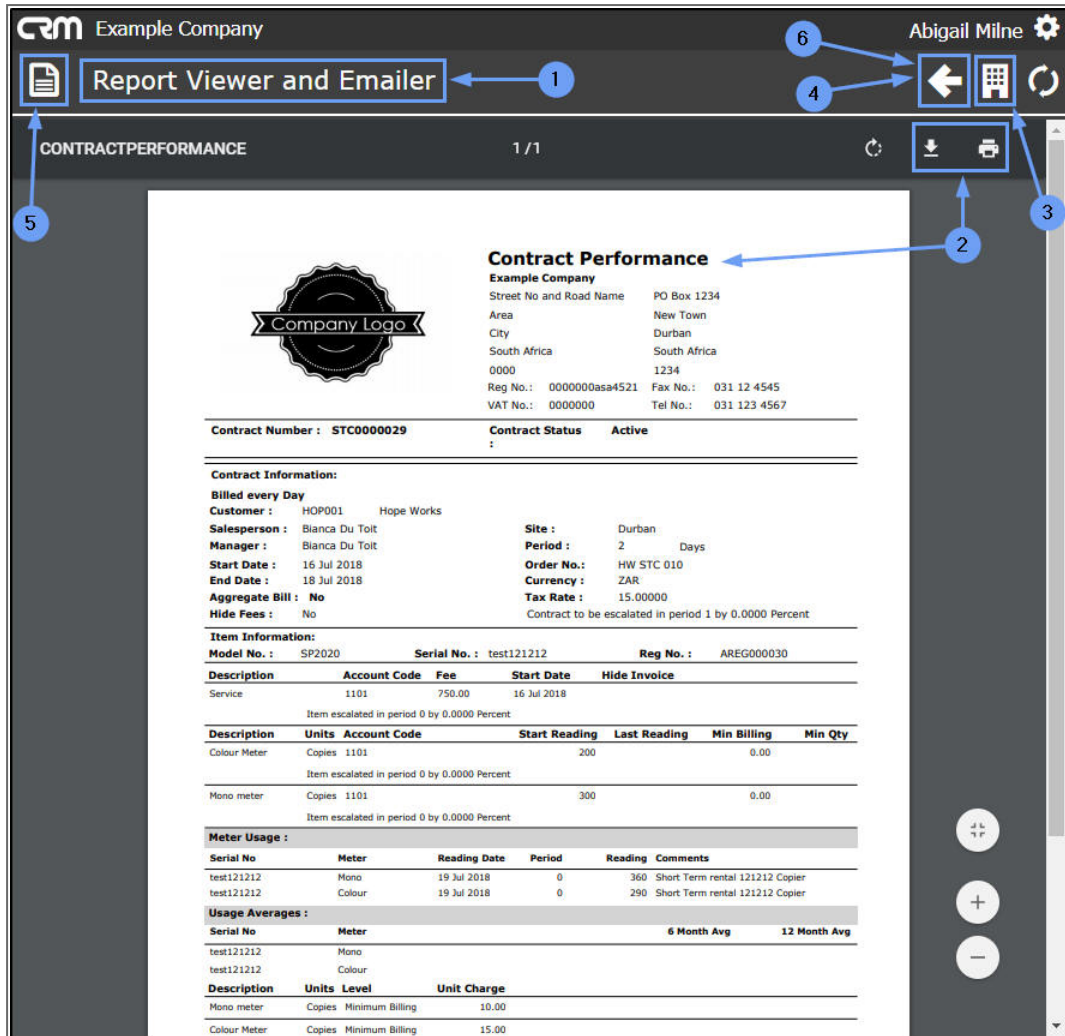
VIEW CONTRACT PERFORMANCE REPORT (CURRENT/ACTIVE CONTRACTS)

- Click on any Contract No. in this list.



Contract No	Start Date	Expiry Date	Months Remaining
CO0000020	01 Jan 2011	01 Jan 2016	-43
CO0000042	07 Sep 2016	07 Sep 2021	25
CO0000043	01 Aug 2016	01 Aug 2021	24
CO0000050	23 May 2017	23 May 2022	33
CO0000052	29 May 2017	29 May 2022	33
CO0000053	26 Jul 2017	26 Jul 2022	35
CO0000056	13 Sep 2017	13 Sep 2022	37
STC0000027	09 Jul 2018	10 Jul 2018	-13
STC0000029	16 Jul 2018	18 Jul 2018	-13
STC0000030	23 Jul 2018	25 Jul 2018	-13

- The **Report Viewer and Emailer** preview screen will be displayed.
- Here, you can view, download and/or print the **Contract Performance** report.
- Either, click on the **Customer** icon to return to the Customer Dashboard (Customer Home page)
- Or, click on the **Back** button to return to the previous page.
- Or, click on the **Page icon** in the top left of the page to return to the Dashboard (Home page).
- For the purpose of this manual, we have selected the **Back** button to return to the previous page.



Contract Performance

Example Company
 Street No and Road Name PO Box 1234
 Area New Town
 City Durban
 South Africa South Africa
 0000 1234
 Reg No.: 0000000asa4521 Fax No.: 031 12 4545
 VAT No.: 0000000 Tel No.: 031 123 4567

Contract Number : STC0000029 **Contract Status** **Active**

Contract Information:
 Billed every Day
 Customer : HOP001 Hope Works
 Salesperson : Bianca Du Toit
 Manager : Bianca Du Toit
 Start Date : 16 Jul 2018
 End Date : 18 Jul 2018
 Aggregate Bill : No
 Hide Fees : No
 Site : Durban
 Period : 2 Days
 Order No.: HW STC 010
 Currency : ZAR
 Tax Rate : 15.00000
 Contract to be escalated in period 1 by 0.0000 Percent

Item Information:
 Model No. : SP2020 Serial No. : test121212 Reg No. : AREG000030

Description	Account Code	Fee	Start Date	Hide Invoice
Service	1101	750.00	16 Jul 2018	
Item escalated in period 0 by 0.0000 Percent				

Description	Units	Account Code	Start Reading	Last Reading	Min Billing	Min Qty
Colour Meter	Copies	1101	200		0.00	
Item escalated in period 0 by 0.0000 Percent						
Mono meter	Copies	1101	300		0.00	
Item escalated in period 0 by 0.0000 Percent						

Meter Usage :

Serial No	Meter	Reading Date	Period	Reading	Comments
test121212	Mono	19 Jul 2018	0	360	Short Term rental 121212 Copier
test121212	Colour	19 Jul 2018	0	290	Short Term rental 121212 Copier

Usage Averages :

Serial No	Meter	6 Month Avg	12 Month Avg
test121212	Mono		
test121212	Colour		

Description	Units	Level	Unit Charge
Mono meter	Copies	Minimum Billing	10.00
Colour Meter	Copies	Minimum Billing	15.00

1. You will return to the **Contracts for [Customer Name]** page.

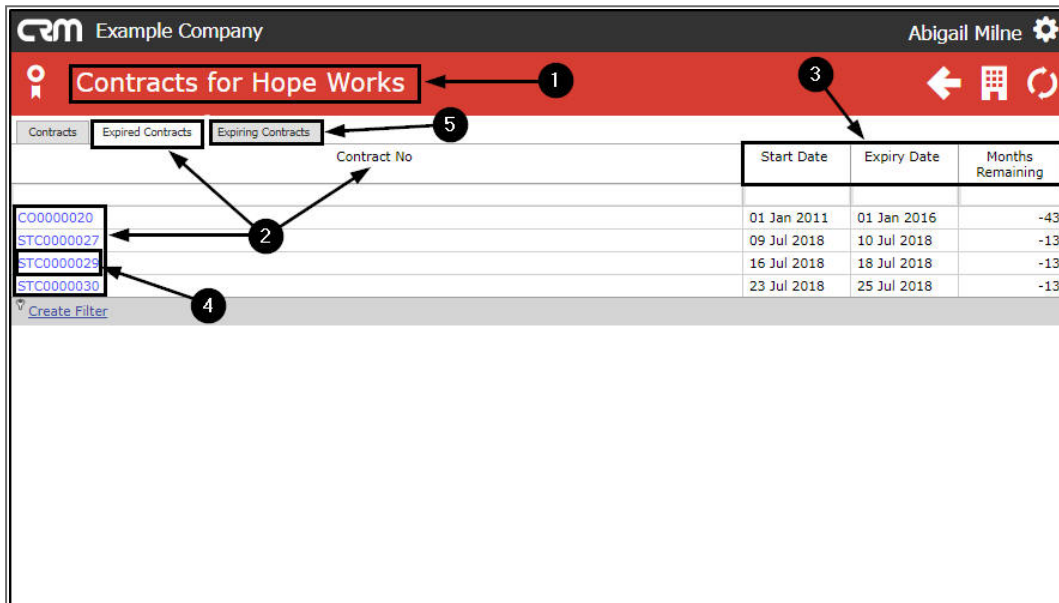
VIEW EXPIRED CONTRACTS

1. Select the **Expired Contracts** tab. This will list only the expired Contract Nos. linked to this customer.
2. In this screen you can view the:
 - **Start Date**,
 - **Expiry Date** and
 - **Months Remaining** for each listed contract.

- **Note:** As these are expired contracts - the figure in this column will reflect as a negative figure.
3. Click on any **Contract No.** to direct you to the **Report Viewer and Emailer** page where you can view, print and download the **Contract Performance** report.

VIEW EXPIRING CONTRACTS

1. Click on the **Expiring Contracts** tab.

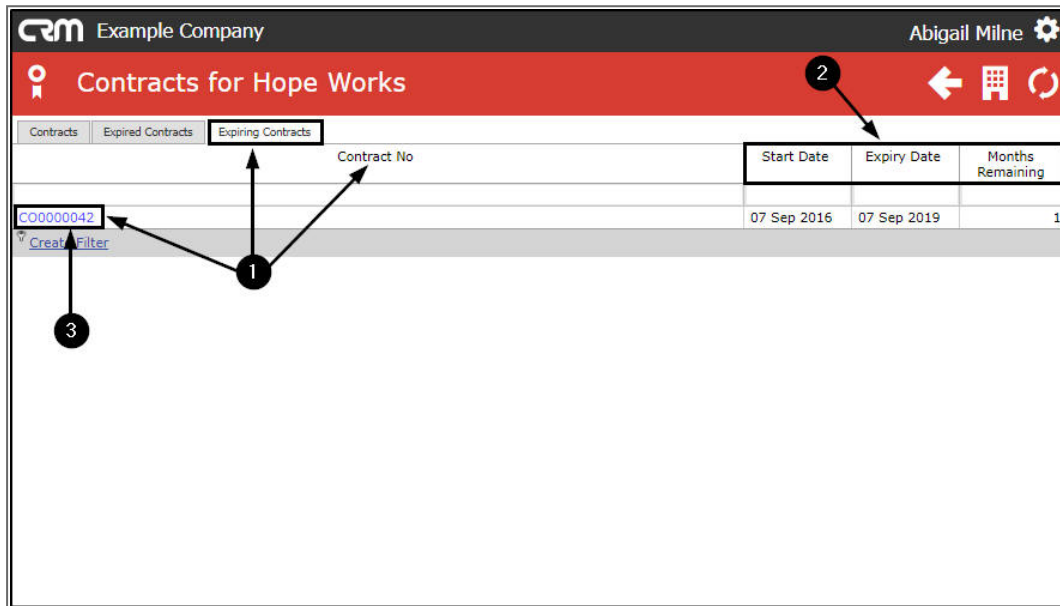


Contract No	Start Date	Expiry Date	Months Remaining
CO0000020	01 Jan 2011	01 Jan 2016	-43
STC0000027	09 Jul 2018	10 Jul 2018	-13
STC0000029	16 Jul 2018	18 Jul 2018	-13
STC0000030	23 Jul 2018	25 Jul 2018	-13

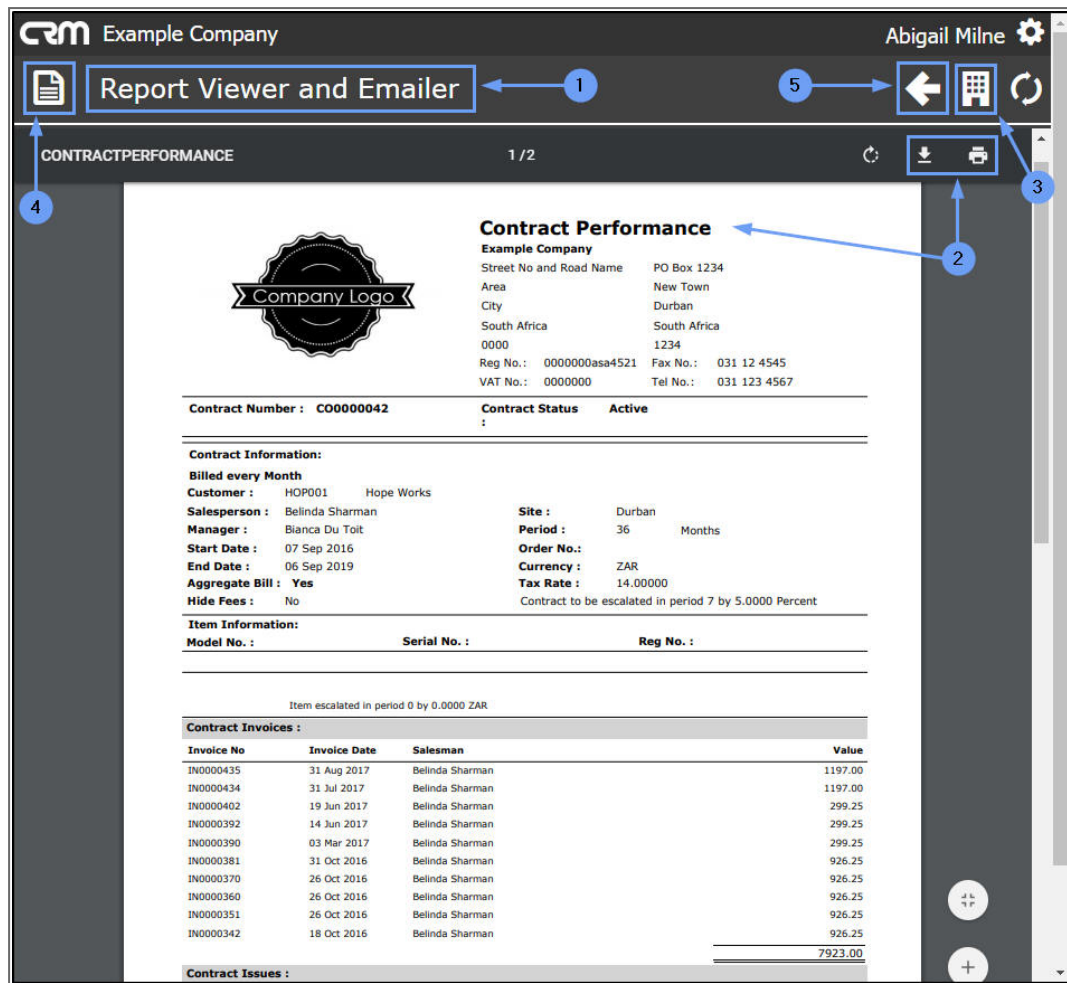
1. The **Expiring Contracts** data grid will come to the fore. This will list only the contracts due to expire in the next **6** months.
2. In this screen you can view the:
 - **Start Date**,
 - **Expiry Date** and
 - **Months Remaining** for each listed contract.

VIEW CONTRACT PERFORMANCE REPORT (EXPIRED OR EXPIRING CONTRACTS)

- Click on any **Contract No.** in either of the 2 data grids (Expired Contracts or Expiring Contracts) to view the **Contract Performance** report.



- The **Report Viewer and Emailer** page will open.
- Here you can view, download and/or print the **Contract Performance** report.
- Either, click on the **Customers icon** to return to the Customer Dashboard (Customer Home page).
- Or, click on the **Page icon** in the top left of the page to return to the Dashboard (Home page).
- Or, click on the **Back** button to return to the previous page.
 - For the purpose of this manual, the **Back** button is selected to return you to the **Contracts for [Customer Name]** page.



CRM Example Company Abigail Milne

Report Viewer and Emailer 1

CONTRACTPERFORMANCE 1/2

Contract Performance

Example Company

Street No and Road Name PO Box 1234
Area New Town
City Durban
South Africa South Africa
0000 1234
Reg No.: 0000000asa4521 Fax No.: 031 12 4545
VAT No.: 0000000 Tel No.: 031 123 4567

Contract Number : C00000042 **Contract Status :** Active

Contract Information:

Billed every Month
Customer : HOP001 Hope Works
Salesperson : Belinda Sharman **Site :** Durban
Manager : Bianca Du Toit **Period :** 36 Months
Start Date : 07 Sep 2016 **Order No.:**
End Date : 06 Sep 2019 **Currency :** ZAR
Aggregate Bill : Yes **Tax Rate :** 14.00000
Hide Fees : No Contract to be escalated in period 7 by 5.0000 Percent

Item Information:

Model No. : **Serial No. :** **Reg No. :**

Item escalated in period 0 by 0.0000 ZAR.

Contract Invoices :

Invoice No	Invoice Date	Salesman	Value
IN0000435	31 Aug 2017	Belinda Sharman	1197.00
IN0000434	31 Jul 2017	Belinda Sharman	1197.00
IN0000402	19 Jun 2017	Belinda Sharman	299.25
IN0000392	14 Jun 2017	Belinda Sharman	299.25
IN0000390	03 Mar 2017	Belinda Sharman	299.25
IN0000381	31 Oct 2016	Belinda Sharman	926.25
IN0000370	26 Oct 2016	Belinda Sharman	926.25
IN0000360	26 Oct 2016	Belinda Sharman	926.25
IN0000351	26 Oct 2016	Belinda Sharman	926.25
IN0000342	18 Oct 2016	Belinda Sharman	926.25
			7923.00

Contract Issues :

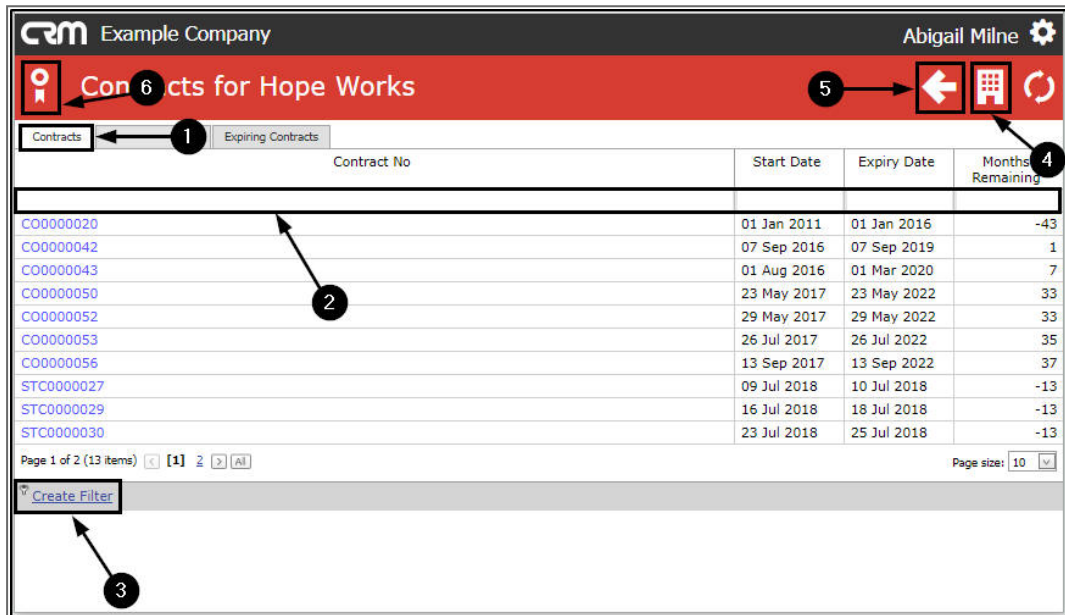
SEARCH FOR A SPECIFIC CONTRACT NO.

To search for a specific contract, it is best to start from the

1. **Contract** data-grid as this will list all contracts; current, expired and due to expire.
2. From here you can use the Filter Row or the
3. Create Filter function to search for the applicable contract no.

EXIT THE CONTRACTS FOR [CUSTOMER NAME] PAGE

4. Either, click on the **Customer** icon to return to the Customer Dashboard (Customer Home page)
5. Or, click on the **Back** button to return to the previous page.
6. Or, click on the **Page icon** in the top left of the page to return to the Dashboard (Home page).



The screenshot shows the 'Contracts for Hope Works' page in a CRM system. The page header includes the CRM logo, 'Example Company', and the user 'Abigail Milne'. The main content area displays a table of contracts with columns for 'Contract No', 'Start Date', 'Expiry Date', and 'Months Remaining'. The table lists 13 contracts, with the first one being 'CO0000020' and the last one 'STC0000030'. The page footer shows 'Page 1 of 2 (13 items)' and a 'Page size' of 10. A 'Create Filter' button is located at the bottom left. Numbered callouts indicate the following elements:

- 1: 'Contracts' tab
- 2: 'Expiring Contracts' tab
- 3: 'Create Filter' button
- 4: 'Back' button
- 5: 'Page icon' (grid icon)
- 6: 'Customer icon' (person icon)

Contract No	Start Date	Expiry Date	Months Remaining
CO0000020	01 Jan 2011	01 Jan 2016	-43
CO0000042	07 Sep 2016	07 Sep 2019	1
CO0000043	01 Aug 2016	01 Mar 2020	7
CO0000050	23 May 2017	23 May 2022	33
CO0000052	29 May 2017	29 May 2022	33
CO0000053	26 Jul 2017	26 Jul 2022	35
CO0000056	13 Sep 2017	13 Sep 2022	37
STC0000027	09 Jul 2018	10 Jul 2018	-13
STC0000029	16 Jul 2018	18 Jul 2018	-13
STC0000030	23 Jul 2018	25 Jul 2018	-13

CRM.002.011

