

CRM BASICS

ADD / EDIT A CUSTOMER

A customer can be added in CRM in order to follow up on leads, i.e. to create **Cases** and **Activities** for the Salesperson to further action.

These customers need to be checked in BPO for all details (such as VAT No, Credit Limit, etc.), and **approved** in BPO.

Note 1: You will only be able to view and / or edit current Customers where you are the main Salesperson, or are linked as a Salesperson, or configured as an Administrator.

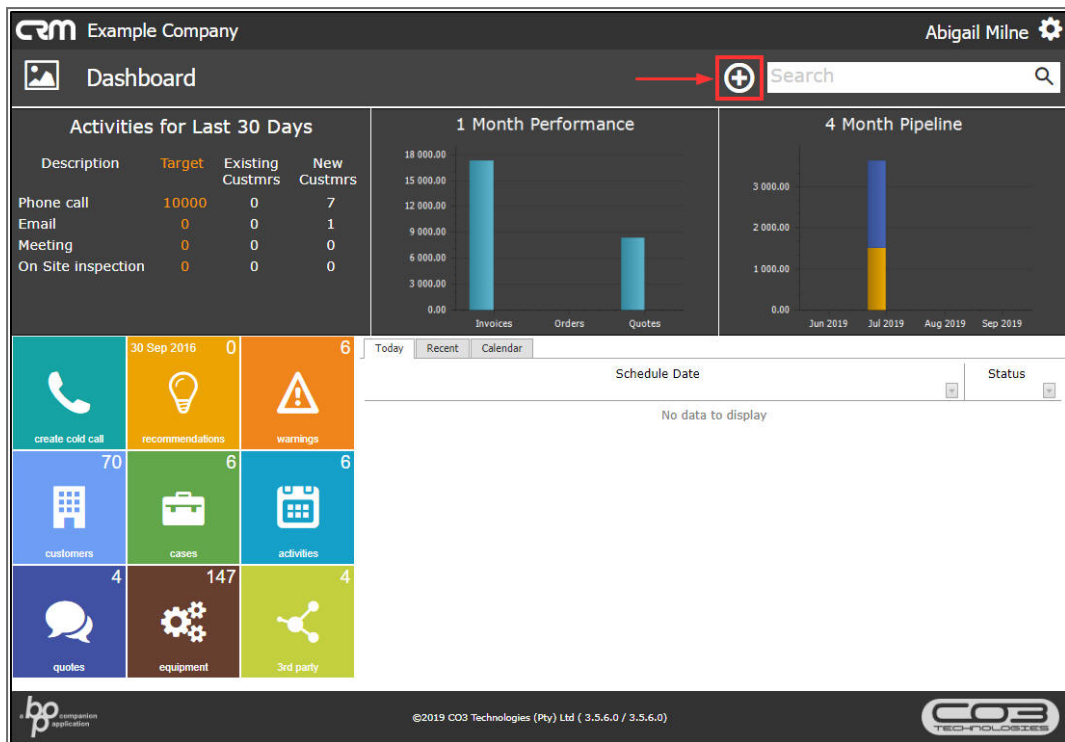
Note 2: After you save the customer, you need to **add a contact** / alternatively, use the **Add Contact** method - which allows you to either just add a Contact or add a new Customer and a new Contact.

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

ADD A NEW CRM CUSTOMER

In the **CRM Dashboard** screen,

- Click on the **Add** [+] icon.



CRM Example Company | Abigail Milne

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

Today | Recent | Calendar

Schedule Date

Status

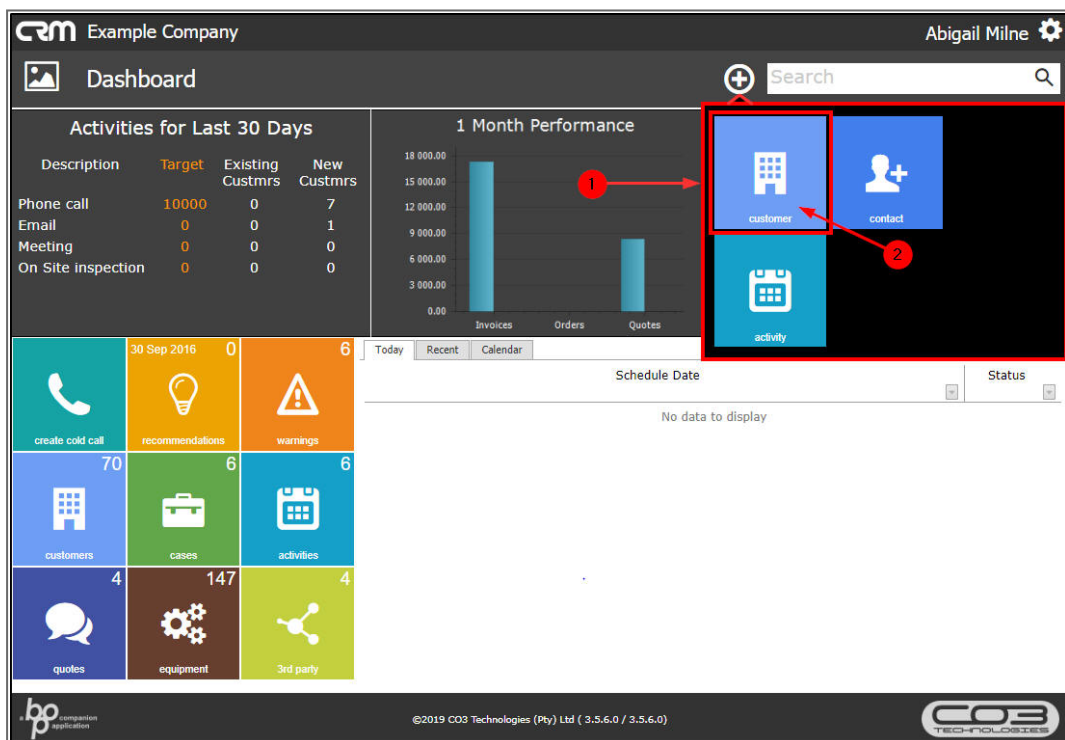
No data to display

bp companion application

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CO3 TECHNOLOGIES

1. The **Add** pop up menu will appear.
2. Click on the **Customer** icon.



CRM Example Company | Abigail Milne

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

Today | Recent | Calendar

Schedule Date

Status

No data to display

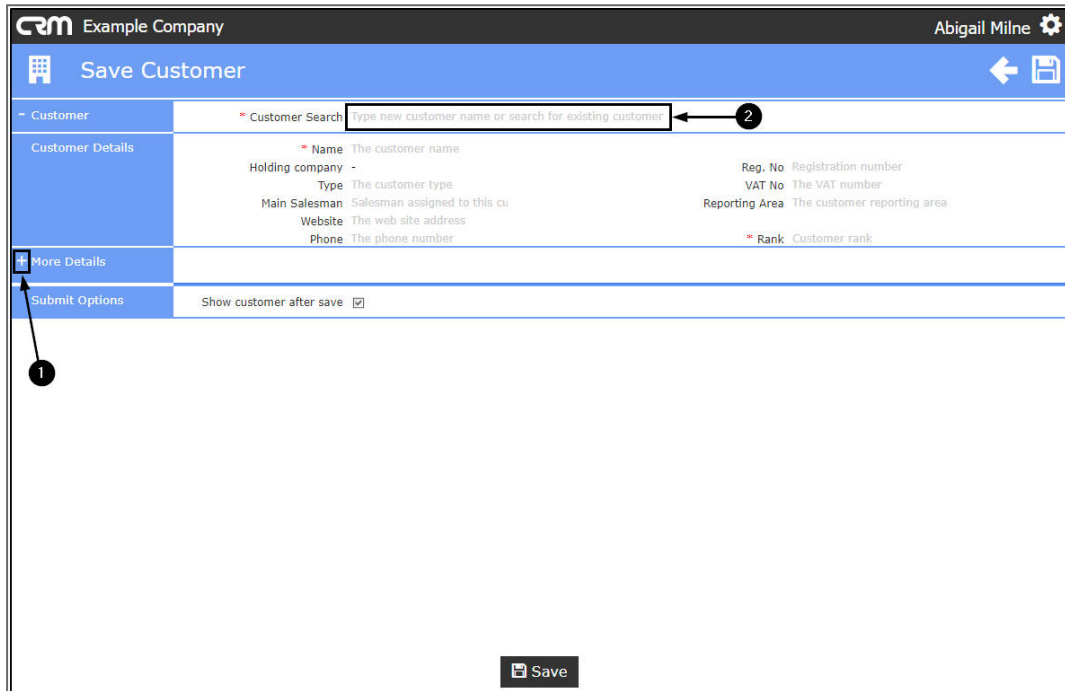
bp companion application

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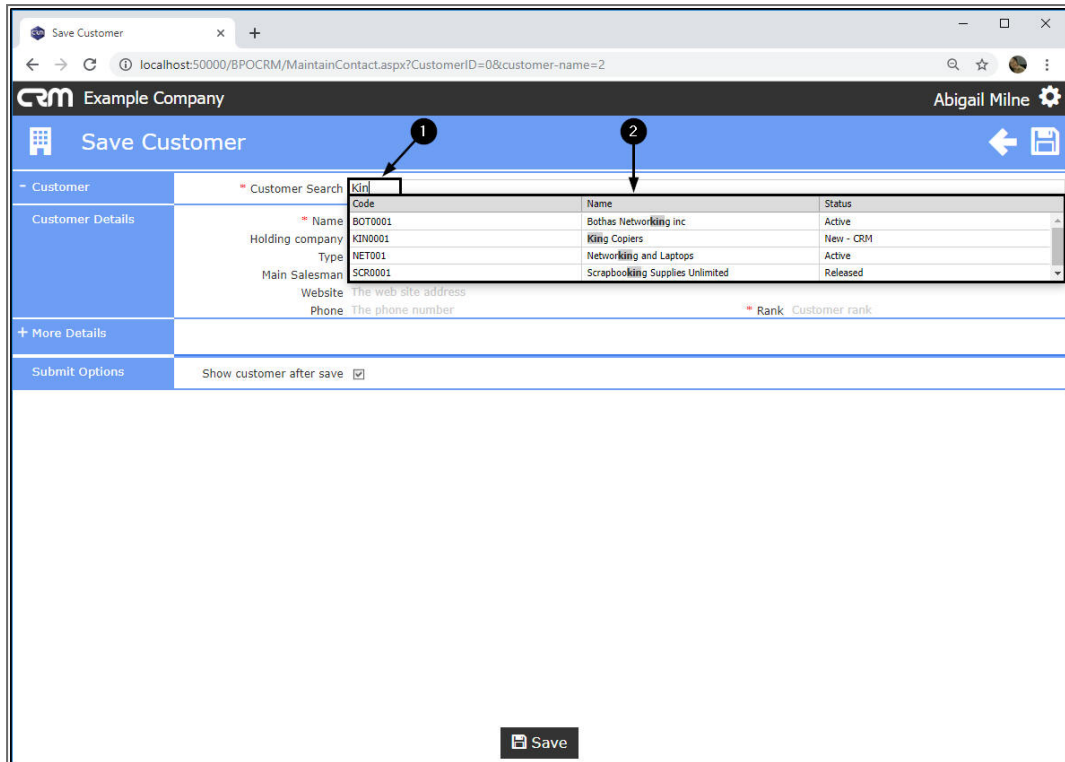
CO3 TECHNOLOGIES

The **Save Customer** screen will be displayed.

1. You will note that the **More Details** frame is hidden. This is because these 'hidden' fields are not required to be entered before you can save the customer. This ensures the interface is uncluttered and therefore easier and more user-friendly for the salesman when entering mandatory customer information.
2. Click in the **Customer Search** text box.



1. Type in the **customer name**. As you type the system will search for similar customer names.
2. A data grid will pop up for you to check that you are not creating a duplicate customer.



Save Customer

localhost:50000/BPOCRM/MaintainContact.aspx?CustomerID=0&customer-name=2

CRM Example Company Abigail Milne

Save Customer

Customer Search: Kini

Code	Name	Status
BOT0001	Bothas Networking inc	Active
KIN0001	King Copiers	New - CRM
NET001	Networking and Laptops	Active
SCR0001	Scrapbooking Supplies Unlimited	Released

Customer Details

Name: BOT0001
Holding company: KIN0001
Type: NET001
Main Salesman: SCR0001

Website: The web site address
Phone: The phone number

Rank: Customer rank

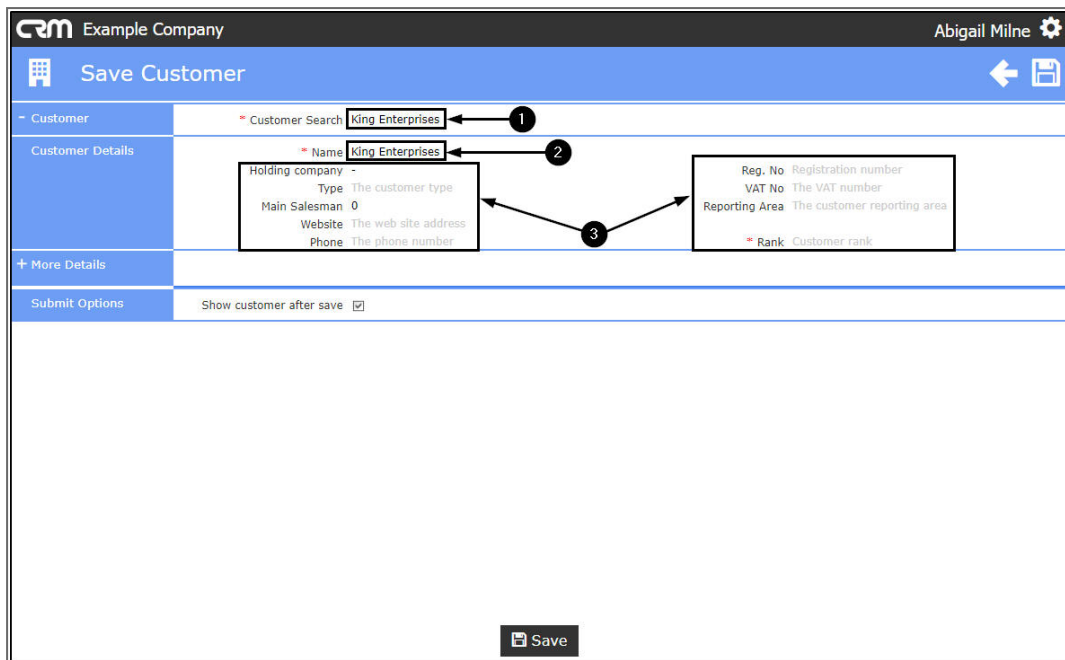
+ More Details

Submit Options

Show customer after save ☒

Save

1. Once you have typed in the full customer name, **click away** from the customer search text box.
2. CRM will populate the **Name** field based on what was typed into the Customer Search textbox.
3. Now you can fill in the rest of the **Customer Details**.



CRM Example Company Abigail Milne

Save Customer

Customer Search: King Enterprises

Customer Details:

Name: King Enterprises

Holding company: -

Type: The customer type

Main Salesman: 0

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

Submit Options: Show customer after save ☒

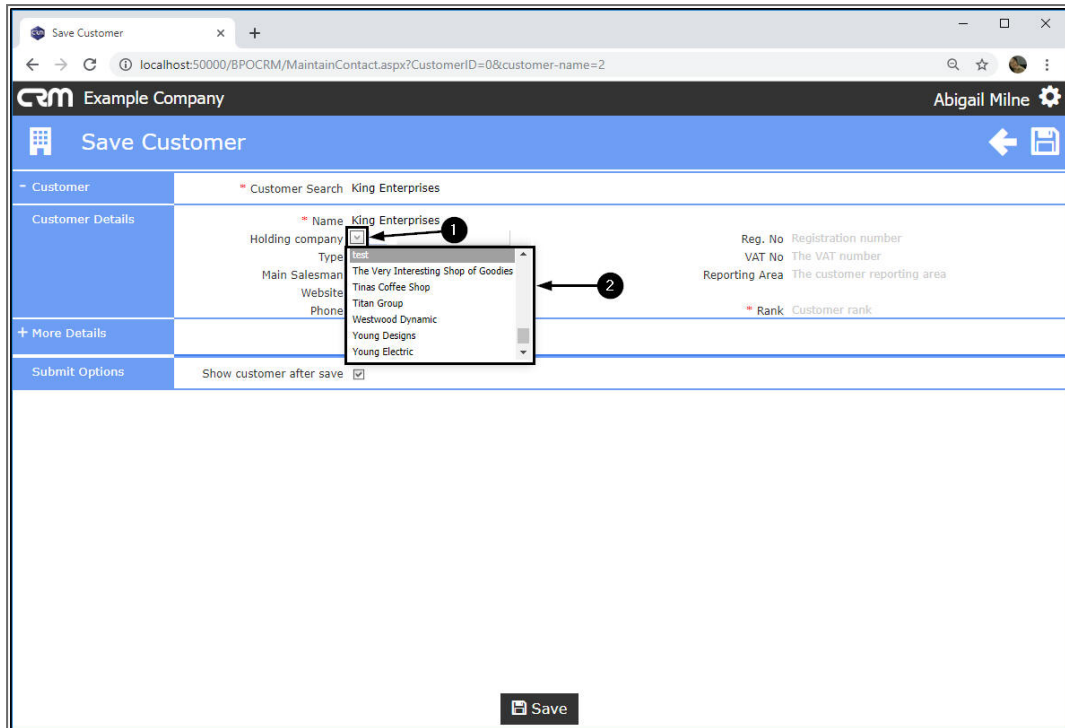
Save

HOLDING COMPANY

Only populate this field if you wish to set this customer up as a **Pastel-linked** customer. If you do link an account here, all transactions done for this customer will post to that account - based on what is set in **company configuration**.

1. Click in this field to display a **drop-down arrow**.
2. Click on this arrow to display a list of **holding companies**. Scroll through this list to search for and select the company that you wish to link to this new customer.

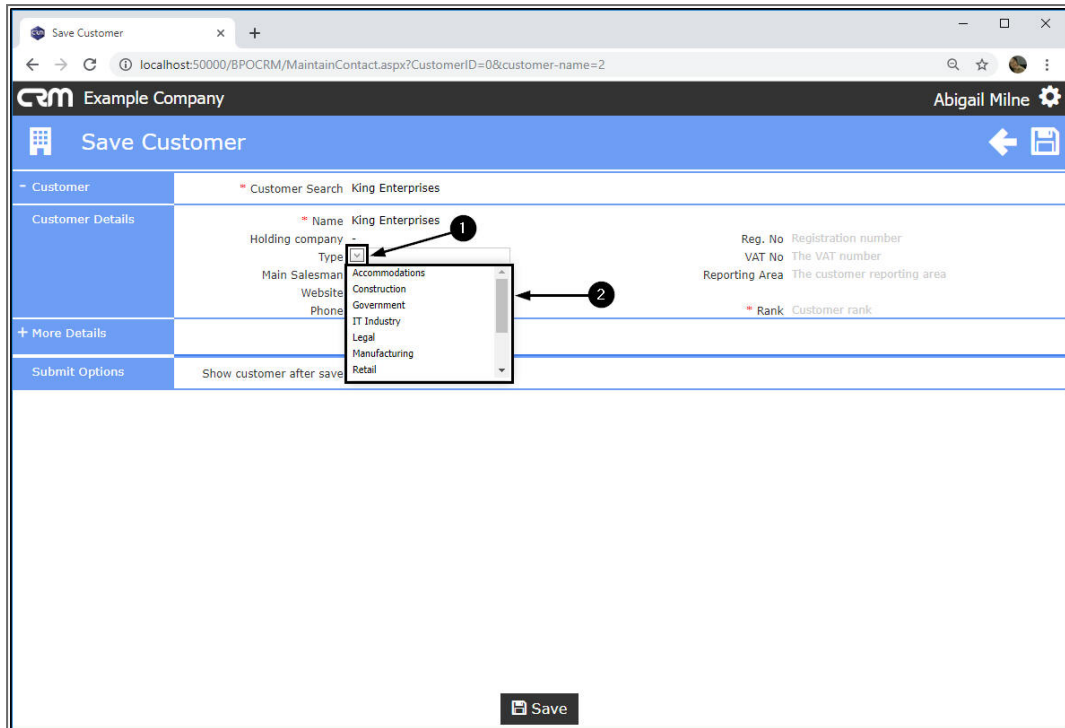
In this example, no holding company has been linked.



TYPE

It is useful to link the customer **type** for reporting purposes.

1. Click in this field to display a **drop-down arrow**.
2. Click on this arrow to display a list of **company types** (Manufacturing, Construction, Retail etc.) Scroll through this list to search for and select the relevant type.



The screenshot shows a web browser window with the URL `localhost:50000/BPOCRM/MaintainContact.aspx?CustomerID=0&customer-name=2`. The page title is 'CRM Example Company' and the user is 'Abigail Milne'. The main heading is 'Save Customer'. Below this, there's a 'Customer Search' dropdown showing 'King Enterprises'. The 'Customer Details' section has several fields: 'Holding company', 'Type' (with a dropdown menu open showing options like Accommodations, Construction, Government, IT Industry, Legal, Manufacturing, and Retail), 'Main Salesman', 'Website', 'Phone', 'Reg. No' (Registration number), 'VAT No' (The VAT number), 'Reporting Area' (The customer reporting area), and 'Rank' (Customer rank). There's a 'Submit Options' section with a checkbox 'Show customer after save'. A 'Save' button is at the bottom right.

- **Salesman:** This will auto populate with the salesman who is currently logged into CRM.
- **Website:** Type in the customer's website.
- **Phone:** Type in the customer's telephone number.
- **Reg. No:** Type in the customer registration number.
- **VAT No:** Type in the customer's VAT number.

CRM

Example Company

Abigail Milne

Save Customer

Customer

Customer Search King Enterprises

Customer Details

Name King Enterprises

Holding company -

Type Legal

Main Salesman 0

Website www.kingenterprises.co.za

Phone 0123456789

Reg. No 01020304

VAT No 111222333

Reporting Area The customer reporting area

Rank Customer rank

More Details

Submit Options

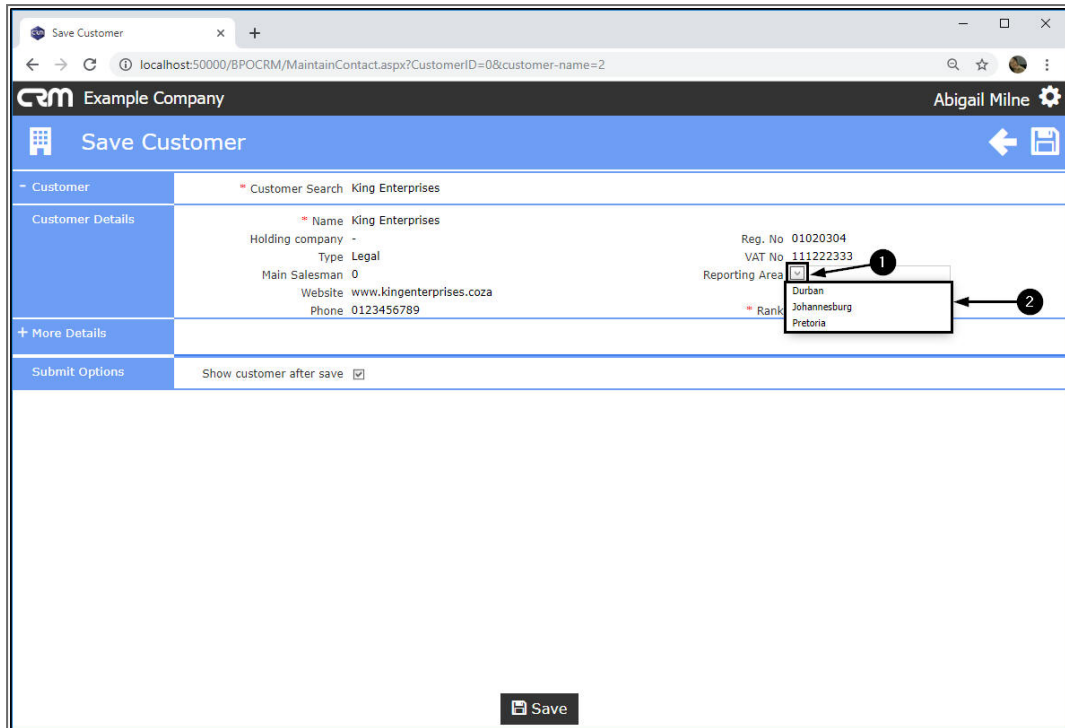
Show customer after save ☒

Save

REPORTING AREA

Each customer must be linked to a reporting area in CRM. These Reporting Areas give you the ability to categorise your clients, or group them into specific physical or otherwise pre-defined areas e.g. Sandton, Nelspruit, etc. Customer [Reporting Areas](#) can be set up in the Configurator.

1. Click in this field to display a **drop-down** arrow.
2. Click on this arrow to display a list of **areas** (Durban, Johannesburg, Pretoria etc.) Scroll through this list to search for and select the relevant area.



Save Customer

CRM Example Company Abigail Milne

Customer Search King Enterprises

Customer Details

Name King Enterprises

Holding company -

Type Legal

Main Salesman 0

Website www.kingenterprises.co.za

Phone 0123456789

Reg. No 01020304

VAT No 111222333

Reporting Area

Rank

Durban

Johannesburg

Pretoria

+ More Details

Submit Options

Show customer after save ☒

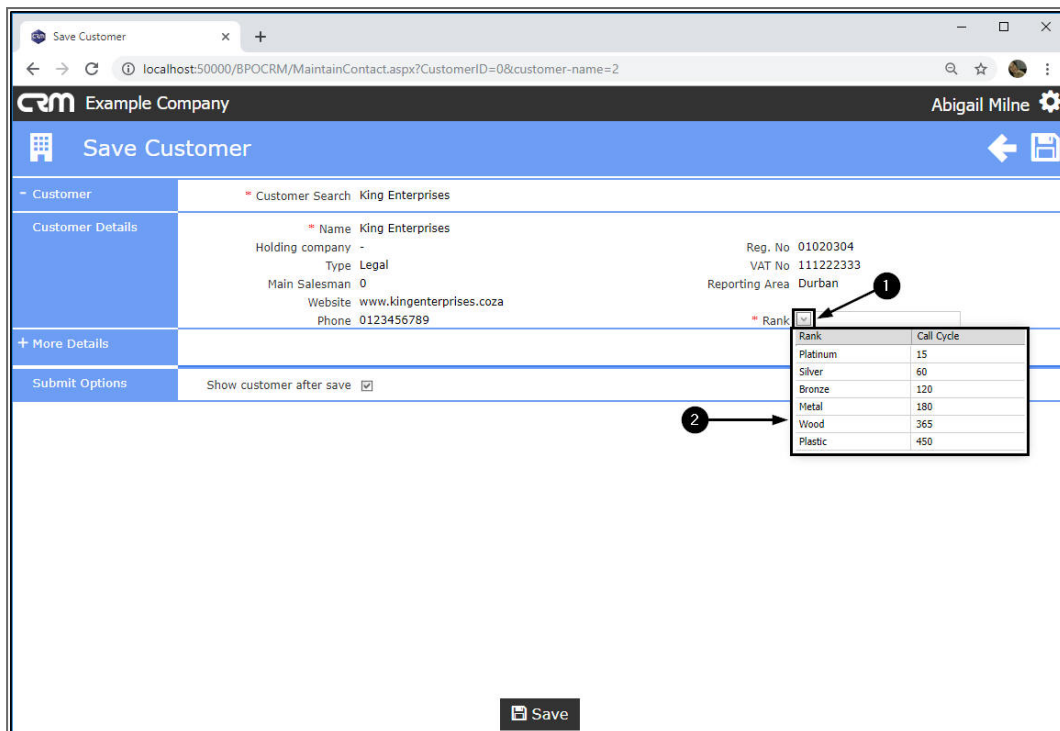
Save

RANK

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.

1. Click in this field to display a **drop-down arrow**.
2. Click on this arrow to display a list of **Ranks** (e.g. Platinum, Bronze, Wood) with their corresponding Call Cycles (e.g. 15, 120, 365 days). Scroll through this list to search for and select the relevant rank from this list.



Save Customer

CRM Example Company Abigail Milne

Customer Search King Enterprises

Customer Details

Name King Enterprises
Holding company -
Type Legal
Main Salesman 0
Website www.kingenterprises.co.za
Phone 0123456789

Reg. No 01020304
VAT No 111222333
Reporting Area Durban

Rank

Rank	Call Cycle
Platinum	15
Silver	60
Bronze	120
Metal	180
Wood	365
Plastic	450

Submit Options

Show customer after save ☒

Save

SUBMIT OPTIONS

The 'Show Customer After Save' check box

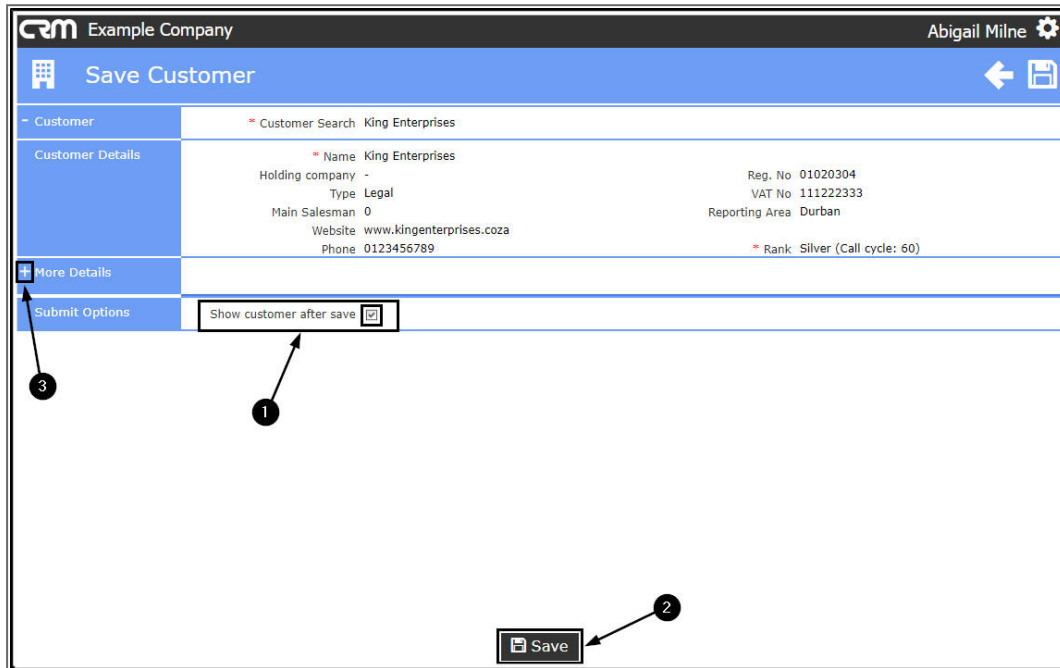
You may decide to **save** the customer at this point, with these minimum required details.

- Before you click on Save, go to the **Show customer after save** check-box.
 - If you **tick** this check box, when you click on Save, you will return to the CRM Dashboard home screen, with the newly created customer details displaying in the **Today** frame.
 - If you **do not** tick this check box, when you click on Save, you will return to the CRM Dashboard home screen, and the newly entered customer details will not display.
- You can select to **Save** the customer at this point as you have entered all the required fields.

However, for the purposes of this manual, we will now explore the **More Details** frame.

MORE DETAILS

3. Click on the **expand** icon in front of **More Details**.



CRM Example Company Abigail Milne

Save Customer

- Customer Customer Search King Enterprises

Customer Details

Name King Enterprises
 Holding company -
 Type Legal
 Main Salesman 0
 Website www.kingenterprises.co.za
 Phone 0123456789

Reg. No 01020304
 VAT No 111222333
 Reporting Area Durban
 Rank Silver (Call cycle: 60)

More Details

Submit Options Show customer after save ☐

Save

The frame will be expanded.

1. Text Fields

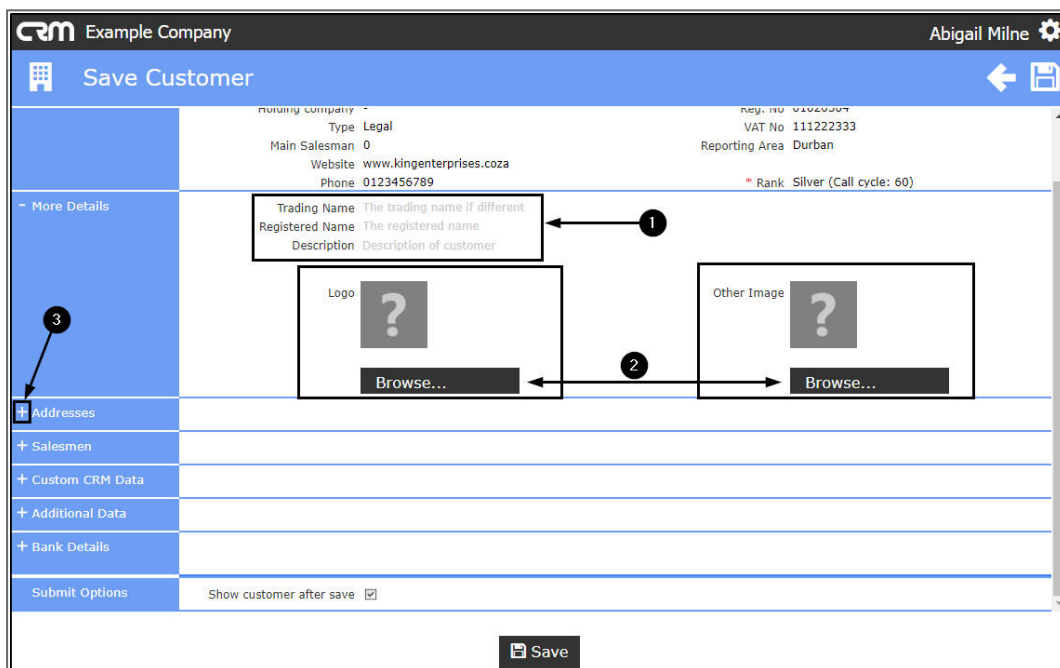
- **Trading Name:** Type in the customer's trading name if this is different from the Customer Name.
- **Registered Name:** Type in the customer's registered name, if required.
- **Description:** Type in comment to describe this customer for reference purposes.

2. Image Fields

- **Logo:** You can click on the Browse button to search for and select a main company image for this customer.
- **Other Image:** You can click on the Browse button to search for and select an additional image for this customer.

Addresses

- When you have finished adding details to this frame, click on the **expand** icon in front of **Addresses**.



The screenshot shows the 'Save Customer' form. The form has a header with 'CRM Example Company' and 'Abigail Milne'. The main section is titled 'Save Customer'. Below this, there are several sections: 'More Details', 'Addresses', 'Salesmen', 'Custom CRM Data', 'Additional Data', 'Bank Details', and 'Submit Options'. The 'Addresses' section is highlighted with a blue bar and a plus icon. A callout box points to the 'Addresses' section with the number 3. Another callout box points to the 'Trading Name' field with the number 1. A third callout box points to the 'Browse...' button for the 'Logo' field with the number 2.

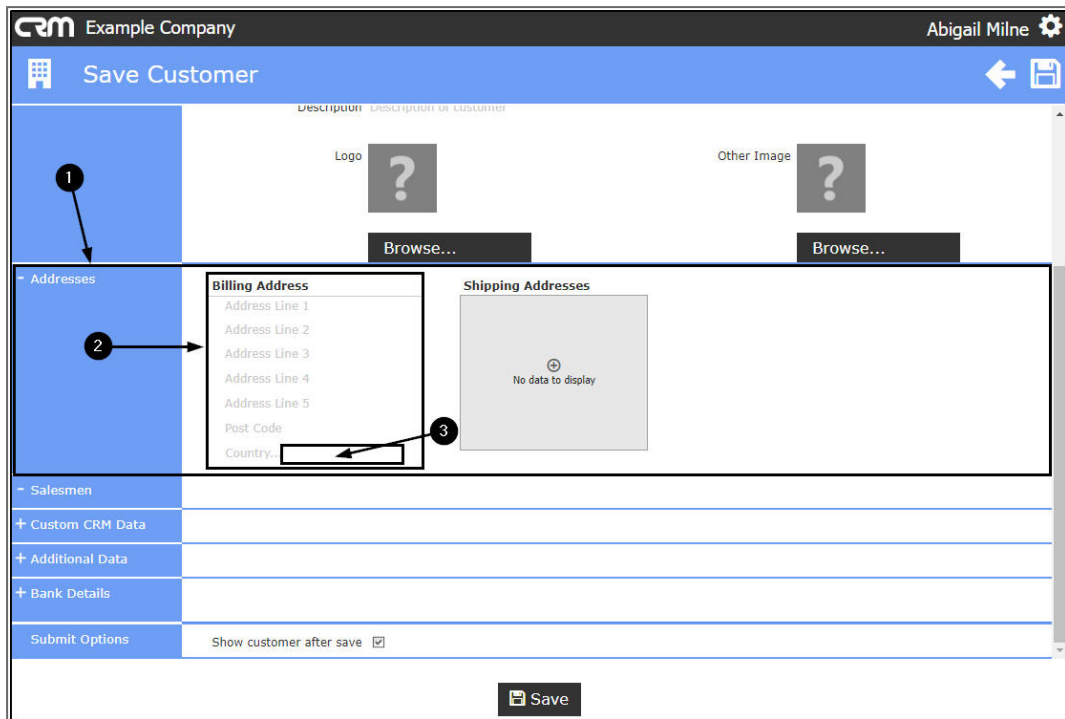
- The **Addresses** frame will be expanded.

Billing Address

- **Note:** There can only be one Billing Address.

- Address Lines 1-5** and **Postcode:** Click in the Address Line fields and type in the Billing (Postal) Address details.

3. **Country:** Click in the Country field.



CRM Example Company Abigail Milne

Save Customer

Description: DESCRIPTION OF CUSTOMER

Logo ? Browse... Other Image ? Browse...

Addresses

Billing Address

Address Line 1
Address Line 2
Address Line 3
Address Line 4
Address Line 5
Post Code
Country. [dropdown]

Shipping Addresses

No data to display

Salesmen

Custom CRM Data

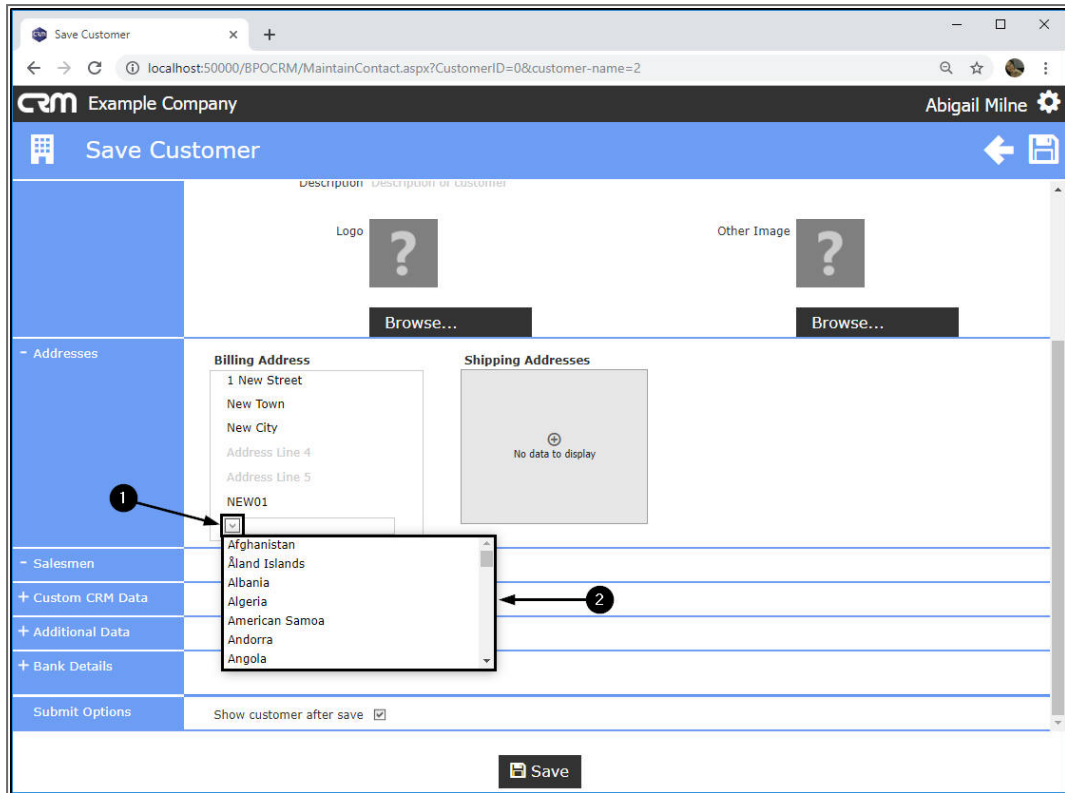
Additional Data

Bank Details

Submit Options Show customer after save ☒

Save

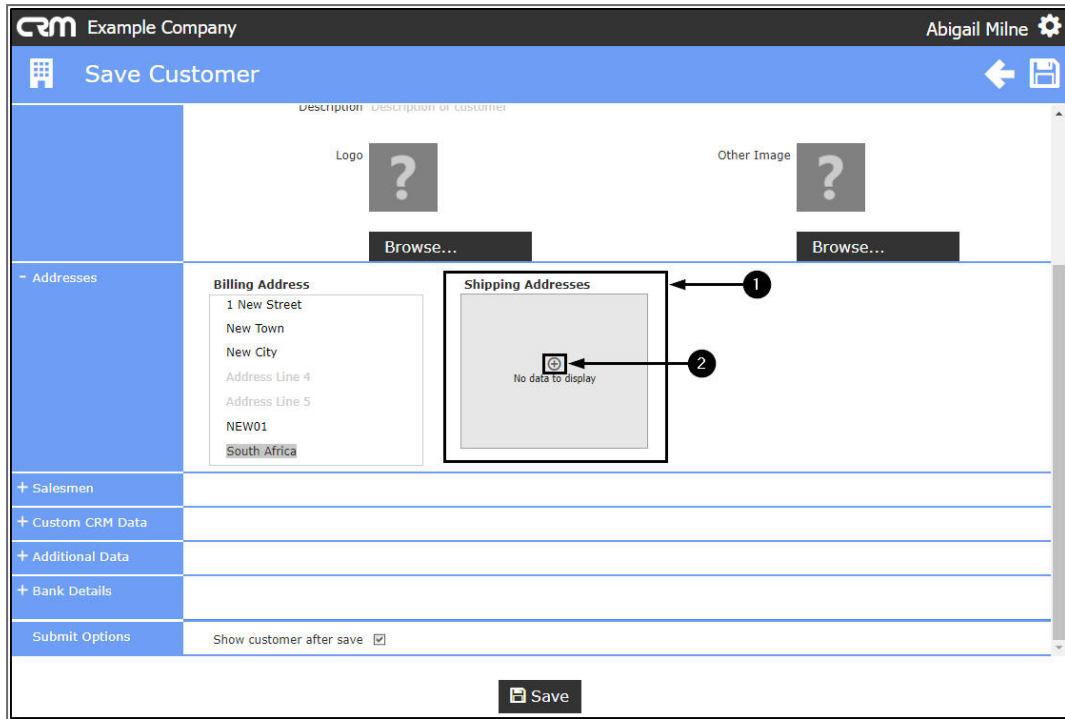
1. You can either type directly in this field or click on the drop-down arrow that appears.
2. A list of countries will display. Select the relevant country from the list.



Shipping Addresses

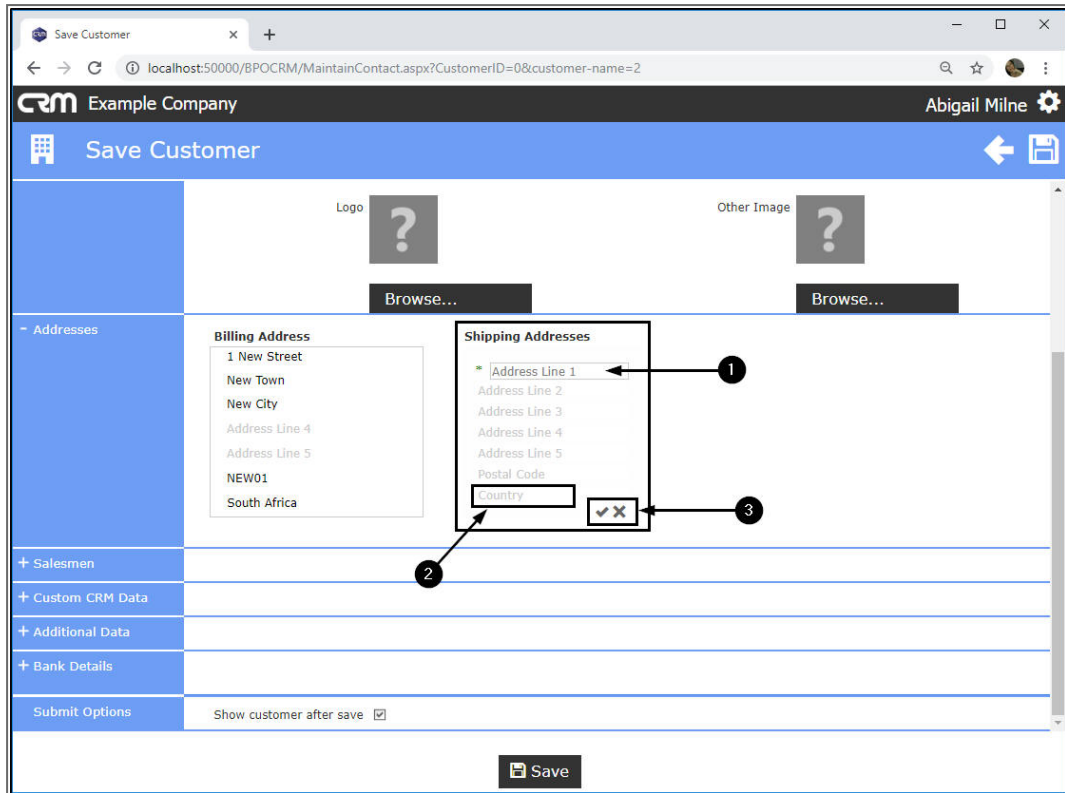
- **Note:** There can be more than one Shipping Address. For example, one customer can have many sites (shipping Addresses) where machines can be delivered and/or serviced.

1. Move across to the **Shipping Address** text box.
2. Click on the **expand** icon.



The screenshot shows the 'Save Customer' form in the CRM system. The form is titled 'Save Customer' and includes a 'Description' field. Below the description are two image upload areas: 'Logo' and 'Other Image', each with a 'Browse...' button. The 'Addresses' section is expanded, showing 'Billing Address' and 'Shipping Addresses'. The 'Billing Address' section contains fields for '1 New Street', 'New Town', 'New City', 'Address Line 4', 'Address Line 5', 'NEW01', and 'South Africa'. The 'Shipping Addresses' section is highlighted with a red box and contains a 'No data to display' message. A red box with a plus icon is also visible in the 'Shipping Addresses' section. The form includes a 'Submit Options' section with a 'Show customer after save' checkbox and a 'Save' button.

1. **Address Lines 1-5 and Postcode:** Click in the Address Line fields and type in the Shipping Address details.
 - **Note:** This is where the actual work will be done e.g. the machine will be delivered or serviced at this address.
2. **Country:** Click in the Country field and either type directly in the field or select from the list displayed, the relevant country.
3. You will note that this frame contains different icons from the Billing Address frame: an **Apply Changes** icon [+] and a **Cancel** icon [x]. This is because of the additional addresses functionality which will be explained in the next few images.



Save Customer

CRM Example Company

Abigail Milne

Addresses

Billing Address

1 New Street

New Town

New City

Address Line 4

Address Line 5

NEW01

South Africa

Shipping Addresses

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Address Line 5

Postal Code

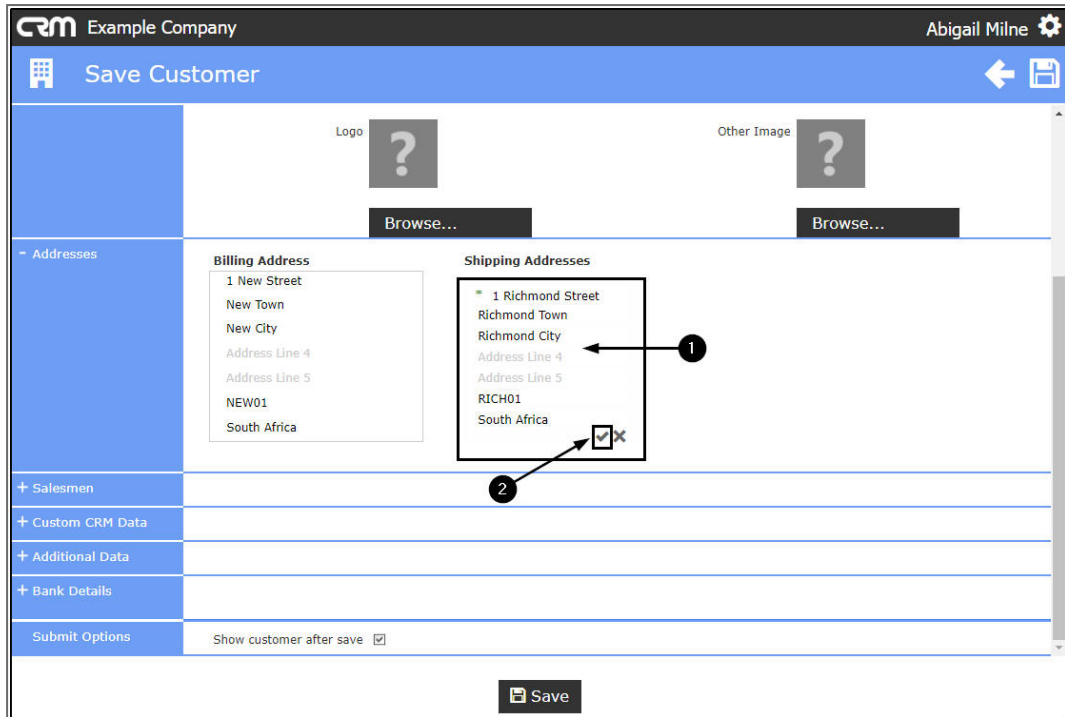
Country

Submit Options

Show customer after save ☒

Save

1. When you have typed in the Shipping Address details,
2. Click on the **Apply Changes** [] icon.



CRM Example Company Abigail Milne

Save Customer

Logo ? Other Image ?

Browse... Browse...

Addresses

Billing Address

1 New Street
New Town
New City
Address Line 4
Address Line 5
NEW01
South Africa

Shipping Addresses

1 Richmond Street
Richmond Town
Richmond City
Address Line 4
Address Line 5
RICH01
South Africa

1

2

+ Salesmen

+ Custom CRM Data

+ Additional Data

+ Bank Details

Submit Options

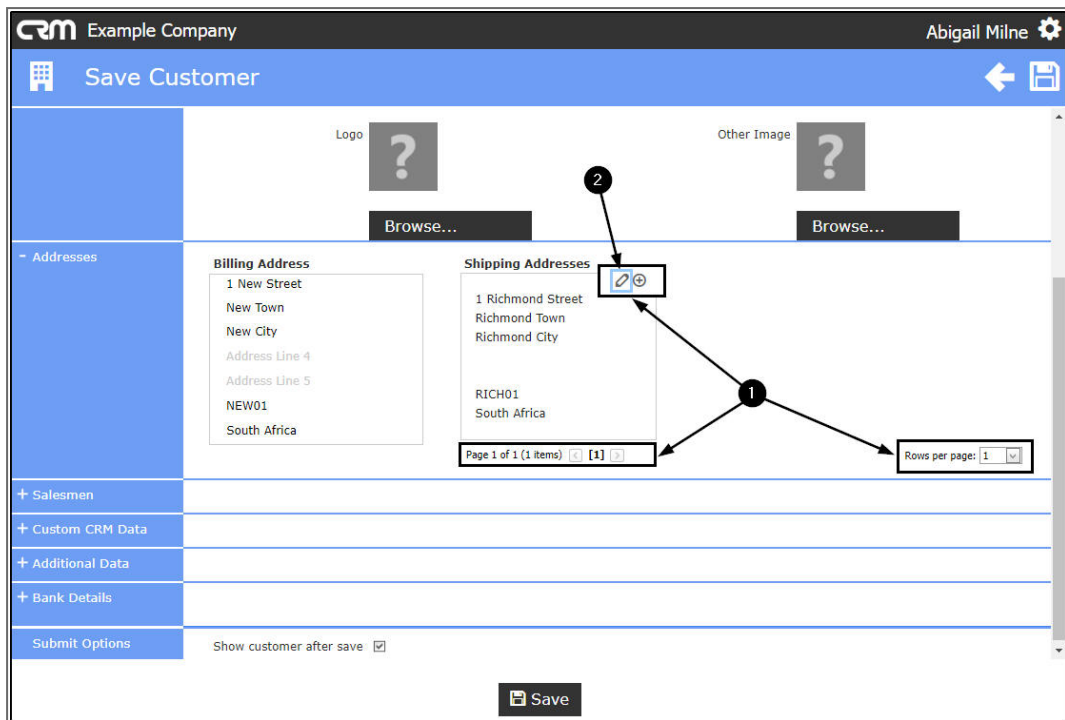
Show customer after save ☒

Save

1. New fields and icons will now appear in the Addresses frame.

Edit Shipping Address

2. Click on the **Edit** icon.



CRM Example Company Abigail Milne

Save Customer

Logo ? Other Image ?

Browse... Browse...

Addresses

Billing Address

1 New Street
New Town
New City
Address Line 4
Address Line 5
NEW01
South Africa

Shipping Addresses

1 Richmond Street
Richmond Town
Richmond City

RICH01
South Africa

Page 1 of 1 (1 items) [1] [2]

Rows per page: 1

+ Salesmen

+ Custom CRM Data

+ Additional Data

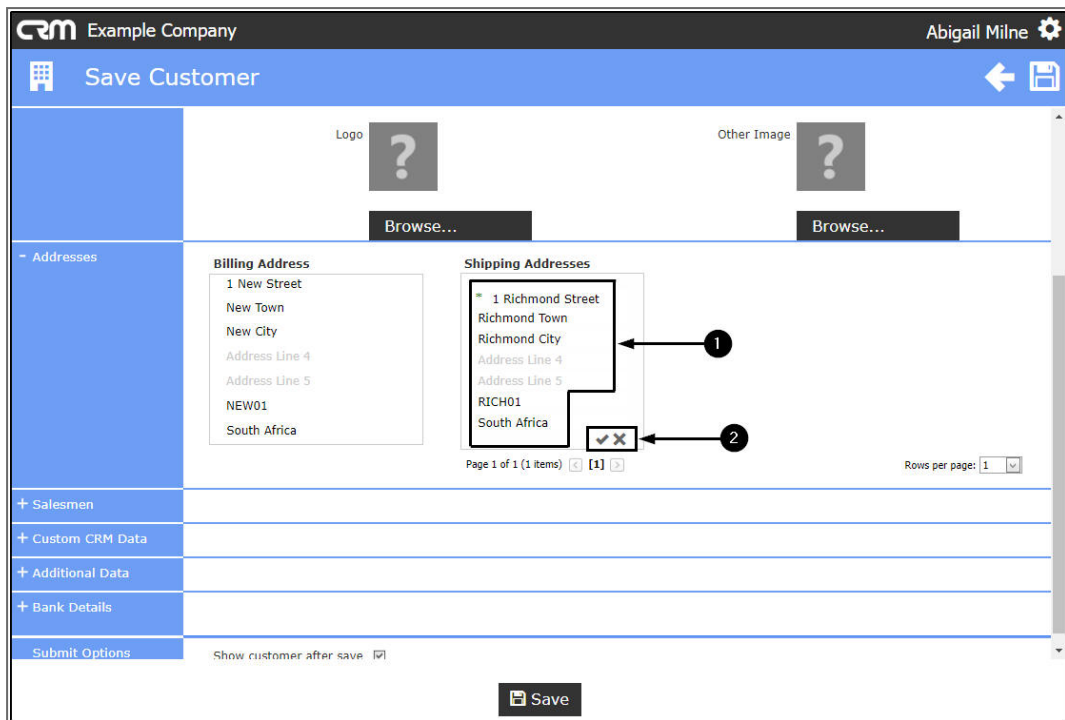
+ Bank Details

Submit Options

Show customer after save ☒

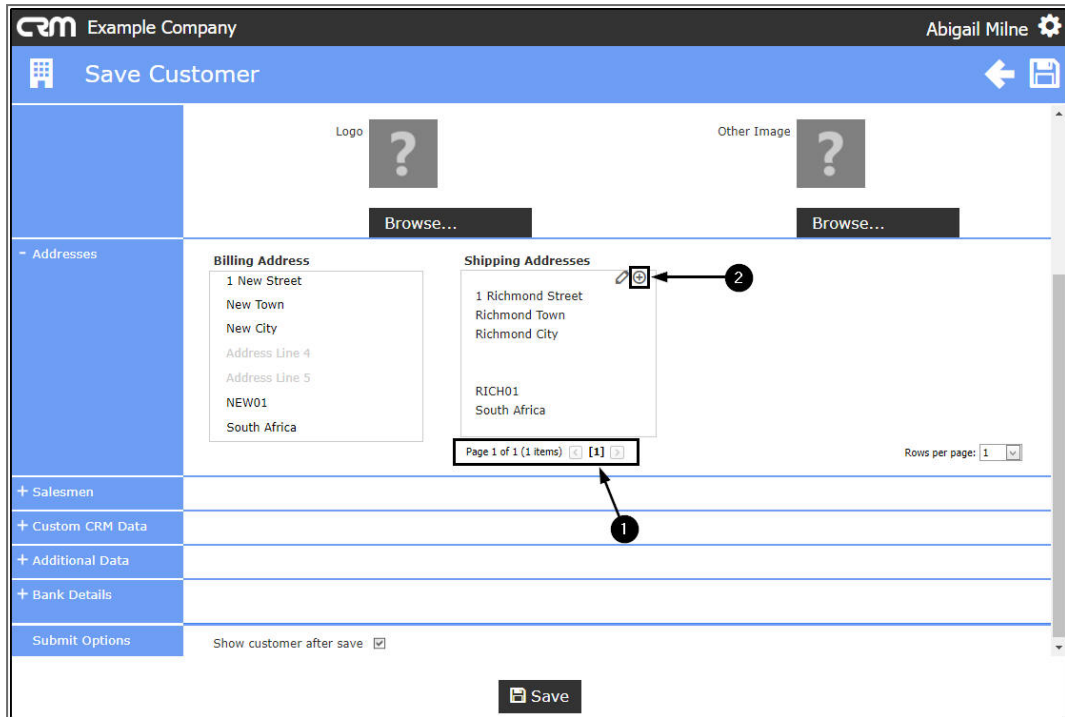
Save

1. You can edit the Shipping Address details as required.
2. Then either click on the **Apply Changes []** icon to save your changes or the **Cancel [x]** icon to cancel any changes made.



Additional Shipping Addresses

1. You will note that this frame contains a **Page Reference** field.
 - In this example, this field displays:
 - [Page 1 of 1 (1 items)] [1]
 - This is because only **1** Shipping Address has been added to this customer.
2. Click on the **plus [+]** icon in the Shipping Address frame.



CRM Example Company Abigail Milne

Save Customer

Logo ? Other Image ?

Browse... Browse...

Addresses

Billing Address

1 New Street
New Town
New City
Address Line 4
Address Line 5
NEW01
South Africa

Shipping Addresses

1 Richmond Street
Richmond Town
Richmond City

RICH01
South Africa

Page 1 of 1 (1 items) [1] [2]

Rows per page: 1

+ Salesmen

+ Custom CRM Data

+ Additional Data

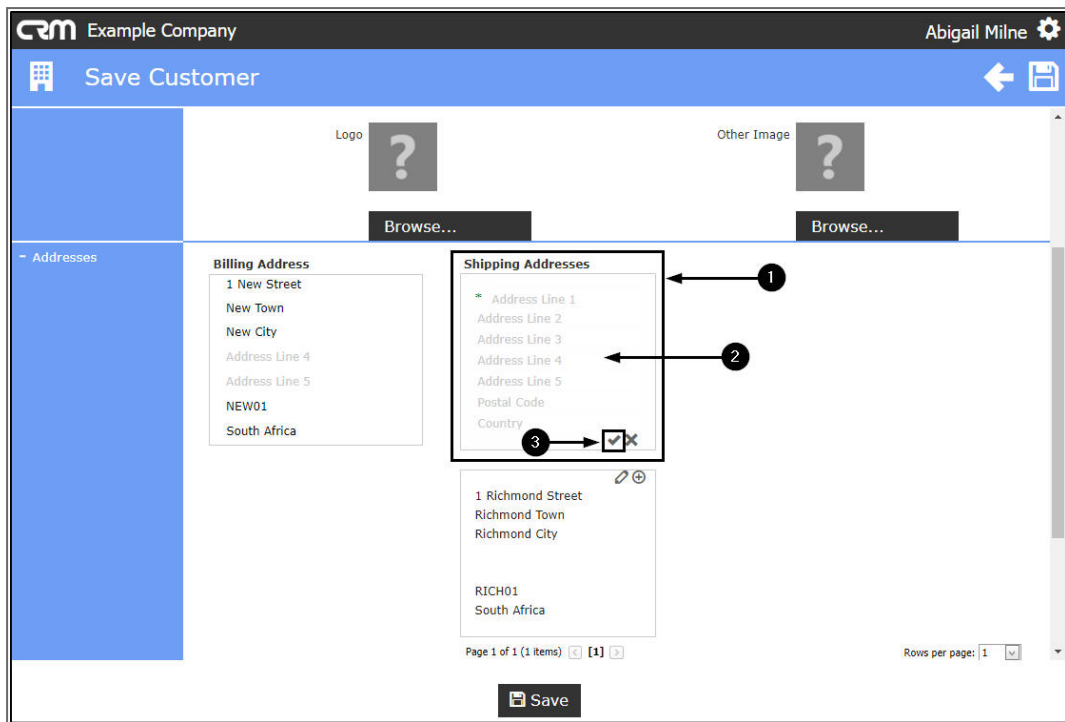
+ Bank Details

Submit Options

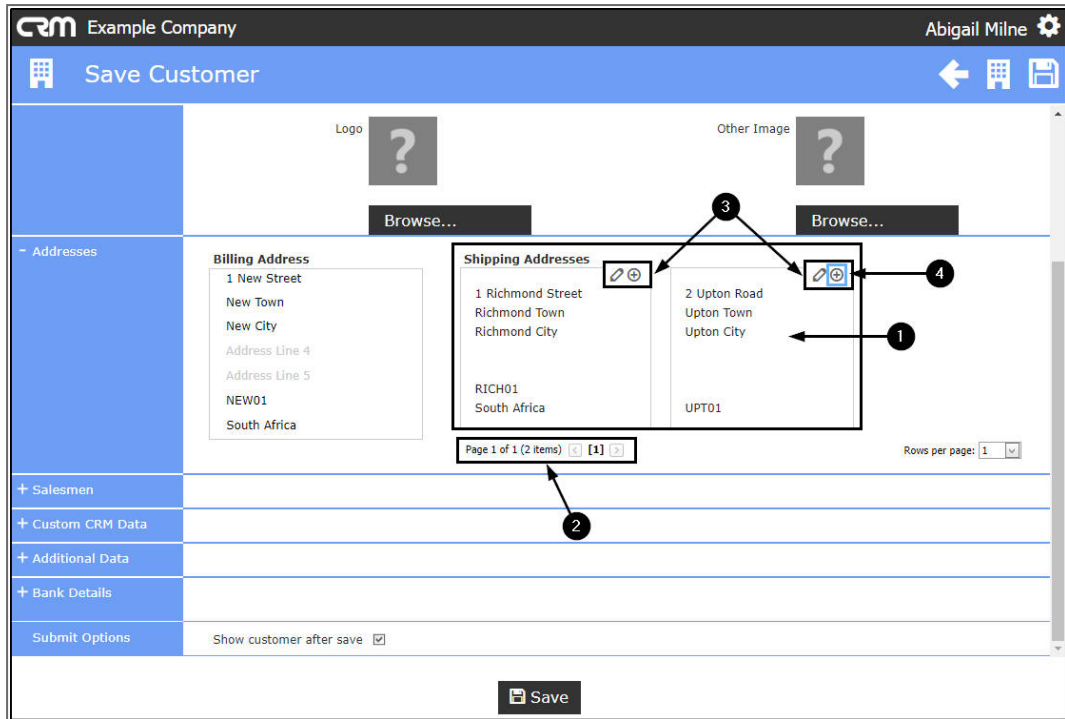
Show customer after save ☒

Save

1. A second Shipping Addresses frame will open.
2. Fill in the second shipping details (as explained above).
3. Click on the **Apply Changes []** icon [].



1. The second Shipping Address will be added to the Addresses frame.
2. You will note that the Page References field now displays:
 - Page 1 of 1 (2 items) [1]
 as there are now **2** shipping addresses displayed on this page.
3. You can edit either of these addresses by clicking on the **Edit []** icon in the relevant Shipping Address frame. You can also click on the **Plus[+]** icon to add a third shipping address, if required.
4. For the purpose of explaining the **Page Reference** field further, **2** more Shipping Addresses have been added.



CRM Example Company Abigail Milne

Save Customer

Logo ? Other Image ?

Browse... Browse...

Addresses

Billing Address

1 New Street
New Town
New City
Address Line 4
Address Line 5
NEW01
South Africa

Shipping Addresses

1 Richmond Street
Richmond Town
Richmond City
RICH01
South Africa

2 Upton Road
Upton Town
Upton City
UPT01

Page 1 of 1 (2 items) [1] [2]

Rows per page: 1

+ Salesmen

+ Custom CRM Data

+ Additional Data

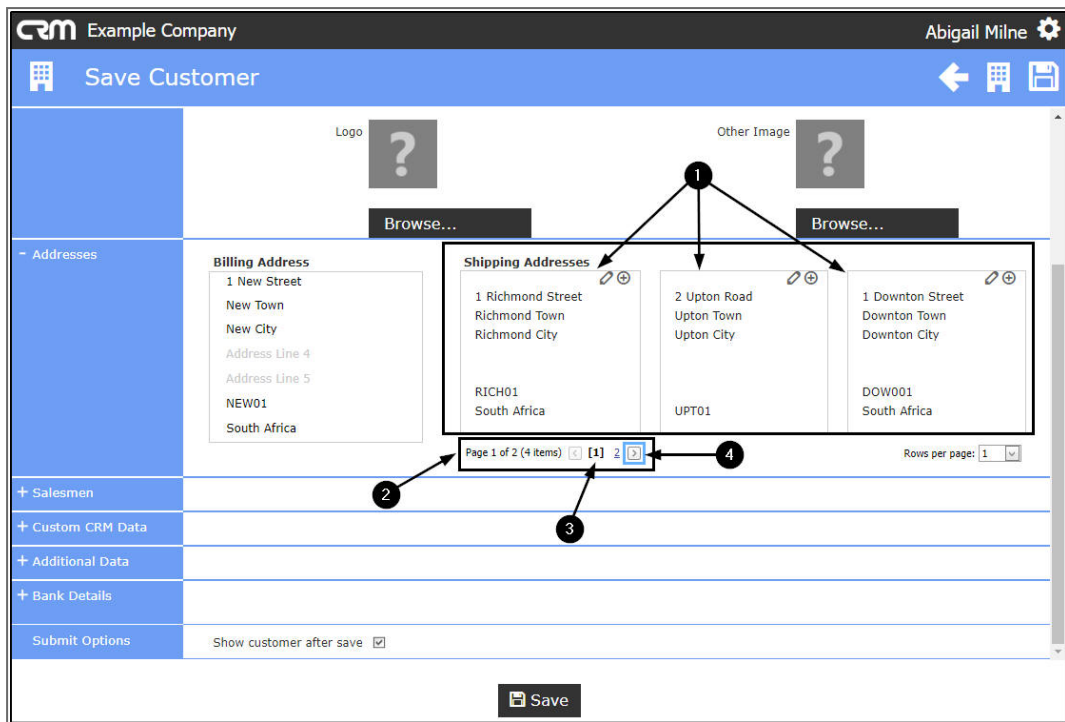
+ Bank Details

Submit Options

Show customer after save ☒

Save

1. In this example, you can view **3** of the Shipping Addresses in the frame.
2. The Page References field will now display:
 - Page 1 of 2 (4 items).
3. The number in **bold** will tell you which page you are currently on.
4. To view the fourth Shipping Address, click on the **right arrow** to move onto the next page.



CRM Example Company Abigail Milne

Save Customer

Logo ? Other Image ?

Browse... Browse...

Addresses

Billing Address

1 New Street
New Town
New City
Address Line 4
Address Line 5
NEW01
South Africa

Shipping Addresses

1 Richmond Street
Richmond Town
Richmond City
RICH01
South Africa

2 Upton Road
Upton Town
Upton City
UPT01

1 Downton Street
Downton Town
Downton City
DOW001
South Africa

Page 1 of 2 (4 items) [1] 2 [3] Rows per page: 1

+ Salesmen

+ Custom CRM Data

+ Additional Data

+ Bank Details

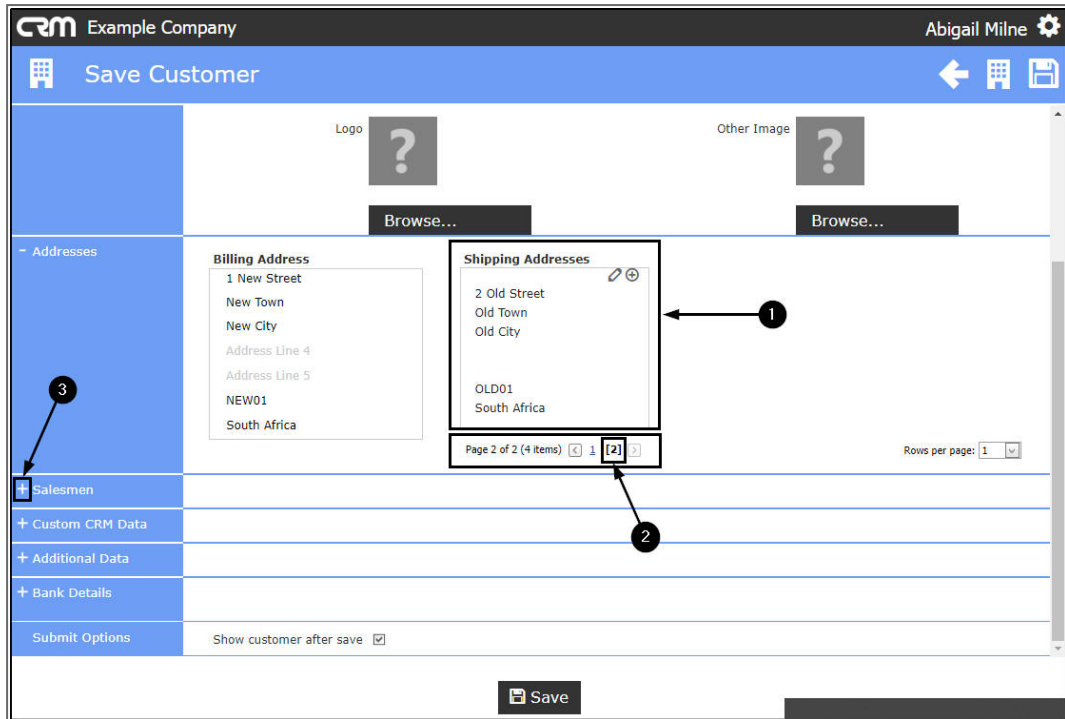
Submit Options Show customer after save ☒

Save

1. You can now view the **4th** Shipping Address
2. The **Page Reference** field will tell you that you are on the page **2** of the Addresses frame.

SALESMAN

3. When you have finished entering the Addresses details, click on the expand icon in front of **Salesmen**.



The screenshot shows the 'Save Customer' form for 'Example Company'. The form has a left sidebar with navigation links: Addresses, Salesmen, Custom CRM Data, Additional Data, Bank Details, and Submit Options. The main area contains fields for Logo and Other Image, both with 'Browse...' buttons. Below these are the Billing Address and Shipping Addresses sections. The Shipping Addresses section is expanded, showing a list of addresses with a '2' in a box next to the first address. A '1' points to the Shipping Addresses list, a '2' points to the checkbox in the Salesmen table, and a '3' points to the Salesmen table header. The Salesmen table has columns for Name, Email, and a checkbox. The bottom of the form has a 'Save' button and a 'Show customer after save' checkbox.

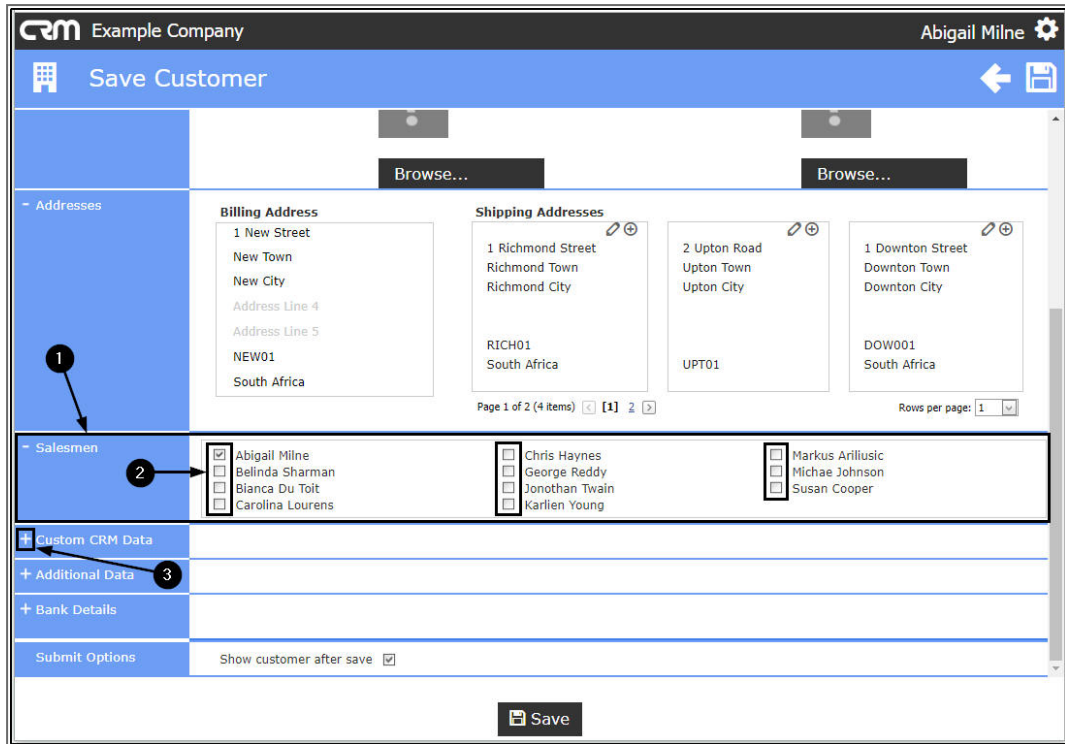
1. This frame will be **expanded**.
2. Select the check box(es) in front of any additional Salesperson(s) that you wish to link to this customer.

This is helpful for 2 reasons:

- This can be used as a reference from **BPO2** if the main Salesperson is not available.
- In **CRM** this also allows selected Salesperson(s) access to the Customer.

CUSTOM CRM DATA

3. When you have finished adding Salesmen if required, click on the expand icon in front of **Custom CRM Data**.

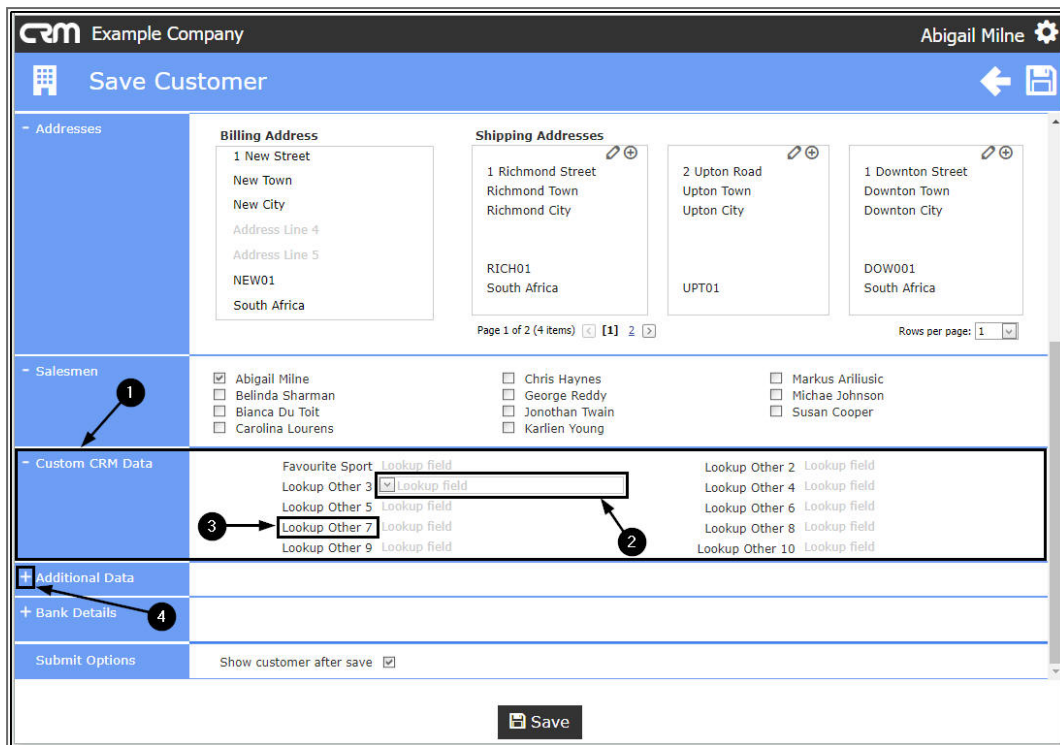


1. This frame will be expanded.
2. Custom **CRM Data field captions** and
3. **CRM Data drop-down field options** can be configured specific to your requirements.

Note : For any Additional Data that you wish to store against your customers, you can use the **Custom CRM Data fields** (outlined above) and **Additional Data fields** (outlined below). Follow the processes hyperlinked to rename the captions for these fields, depending on the information you need to store.

ADDITIONAL DATA

4. When you have finished adding Custom CRM Data, click on the expand icon in front of **Additional Data**.



CRM Example Company Abigail Milne

Save Customer

Addresses

Billing Address

1 New Street
New Town
New City
Address Line 4
Address Line 5
NEW01
South Africa

Shipping Addresses

1 Richmond Street
Richmond Town
Richmond City
RICH01
South Africa

2 Upton Road
Upton Town
Upton City
UPT01

1 Downton Street
Downton Town
Downton City
DOW001
South Africa

Page 1 of 2 (4 items) [1] 2 Rows per page: 1

Salesmen

☒ Abigail Milne
☐ Belinda Sharman
☐ Bianca Du Toit
☐ Carolina Lourens

☐ Chris Haynes
☐ George Reddy
☐ Jonathan Twain
☐ Karlén Young

☐ Markus Ariliusic
☐ Michae Johnson
☐ Susan Cooper

Custom CRM Data

Favourite Sport

Lookup Other 3

Lookup Other 5

Lookup Other 7

Lookup Other 9

Lookup Other 2

Lookup Other 4

Lookup Other 6

Lookup Other 8

Lookup Other 10

Additional Data

Bank Details

Submit Options

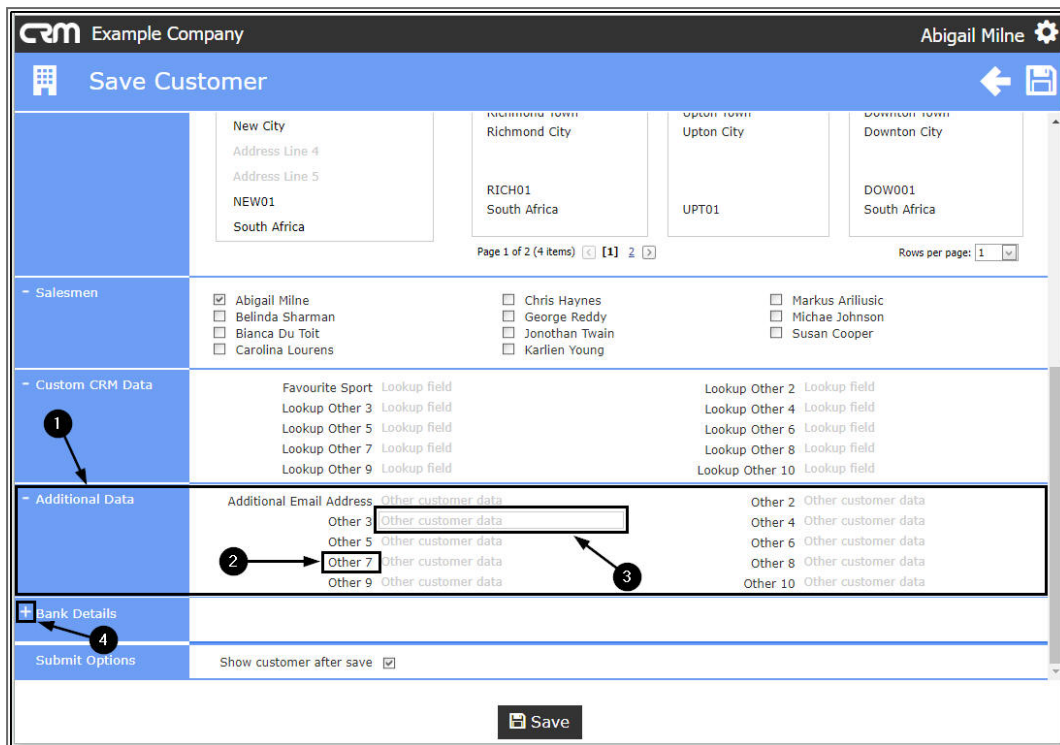
Show customer after save ☒

Save

1. This frame will be expanded.
2. Custom **Additional Data field captions** and
3. **Additional Data drop-down field options** can be configured specific to your requirements.

BANK DETAILS

4. When you have finished setting up Additional Data as required, click on the expand icon in front of **Bank Details**.



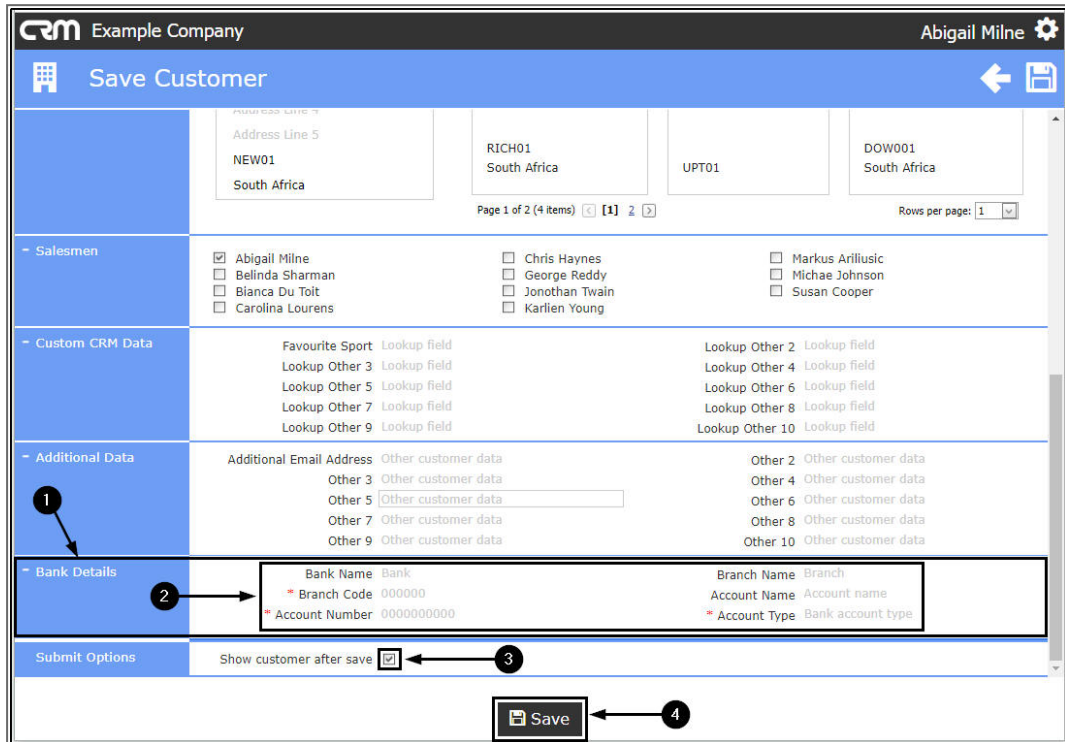
1. This frame will be expanded.
2. If you have the customer's banking details, you can type them in here.

SUBMIT OPTIONS – SHOW CUSTOMER AFTER SAVE CHECK BOX SELECTED

3. You have the option to view this customers details after save in the home screen.
 - If you **tick** this check box, when you click on Save, you will return to the CRM Dashboard home screen, with the newly created customer details displaying in the **Today** frame.
 - If you do not tick this check box, when you click on Save, you will return to the CRM Dashboard home screen, and the newly entered customer details will not display.

SAVE NEW CUSTOMER

4. Click on **Save** when you are done.



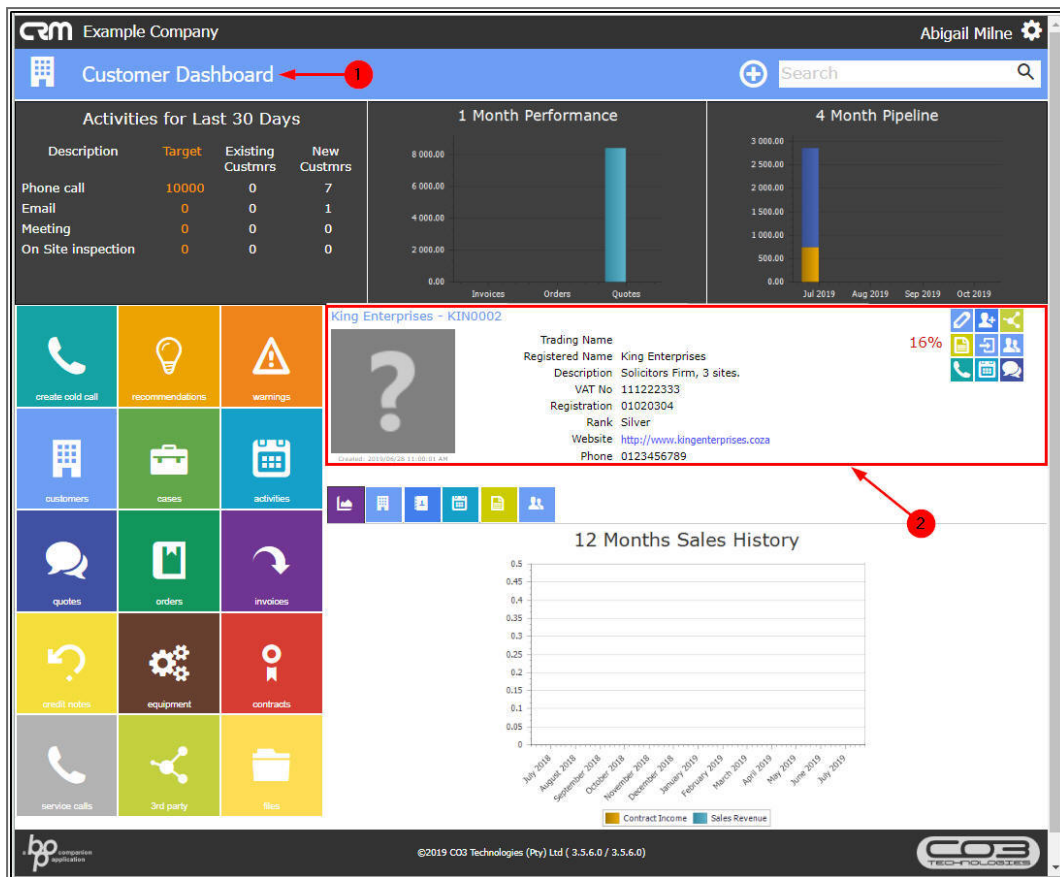
The screenshot shows the 'Save Customer' form in the CRM system. The form is titled 'Save Customer' and is for 'Example Company'. It shows various fields for customer information, including address, salesmen, custom CRM data, additional data, and bank details. A 'Save' button is at the bottom right. Numbered arrows indicate key steps: 1 points to the 'Additional Data' section, 2 points to the 'Bank Details' section, 3 points to the 'Show customer after save' checkbox, and 4 points to the 'Save' button.

1. If you selected to **Show customer after save**, you will return to the home screen where it will now display **Customer Dashboard** in the title bar.

2. Here you can view the newly created customer details.

Note:

- the **Sales History** graph is now displayed
- there are new icons in this dashboard
- the percentage (%) of information gathered



SUBMIT OPTIONS – SHOW CUSTOMER AFTER SAVE CHECK BOX UNSELECTED

1. If you did not select the **Show customer after save** check box, you will return to the CRM home screen Dashboard.
2. There will be no customer details displayed on the dashboard.

CRM

Example Company

Abigail Milne


Dashboard

Search

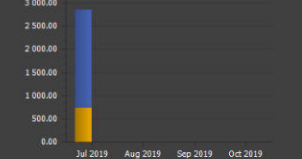
Activities for Last 30 Days

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



Today

Recent

Calendar

create cold call

73

recommendations

6

warnings

6

customers

73

notes

6

activities

6

quotes

4

equipment

147

3rd party

4

Schedule Date

No data to display

Status

bp

business process

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TECHNOLOGIES

CRM.000.004