

# **CRM BASICS**

# SALES PERFORMANCE SUMMARY

The CRM Performance Summary will indicate your Sales <u>Target</u> vs. <u>Actual</u> over a monthly period.

This <u>time frame can be configured in BPO</u> according to your company requirements and split between current BPO clients and New Customers.

The Performance Types are:

- Cases
- Quotes
- Orders
- Invoices

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

#### VIEW PERFORMANCE SUMMARY IN THE HOME PAGE

- 1. In the CRM *Homepage*,
- 2. You can view the [] Month Performance frame.

**Note:** The amount of months that you can view in this frame is <u>configured in BPO</u>.

- 3. This frame will contain bars of up to 3 colours, reflecting the number of:
  - New (orange)
  - Existing (blue) and
  - **Target** (pink) customers per performance type.
- 4. The Performance types are represented on the horizontal axis:



- Cases,
- Invoices,
- Orders and
- Quotes.
- 5. The values are represented on the vertical axis.



## **VIEW CASES MONTH PERFORMANCE**

- 1. Hover over the *Cases* section of the bar chart to bring up the Cases information box.
- 2. Each type of Case value will be listed:
  - New Customers:
  - Existing Customers:
  - Target:



 In this example, the New customers have a total caseload value of 13750, the Existing customers currently have zero caseload value, the Target for this salesman is a total caseload value of 15000 per 1 month.

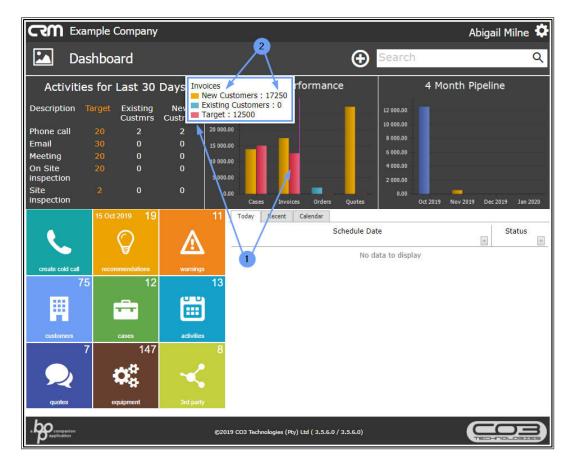
CRM Exar	nple Company	1			Abigail Milne	\$
🔼 Das	shboard	2		🕀 Se	arch	Q
Activities	s for Last 30	Days /	1 Month Performanc	e	4 Month Pipeline	
	Custmr: 400 2 30 0 40 0 50 0 2 0	Cases New Customers Existing Customer Target : 15000 0 10 000. 0 500. 0 0	ers : 0	10 0 8 0 6 0 4 0	000.00 000.00 000.00 000.00 0.00	120
create cold call	15 Oct 2019 19	11 A warnings	Today Recent Calendar S	chedule Date No data to	status o display	¥
75 EE customers	12	13				
7 Q quotes	147	8 ~ 3rd party				
©2019 C03 Technologies (Pty) Ltd ( 3.5.6.0 / 3.5.6.0)						

# **VIEW INVOICES MONTH PERFORMANCE**

- 1. Hover over the *Invoices* section of the bar chart to bring up the Invoices information box.
- 2. Each type of Invoice value will be listed:
  - New Customers:
  - Existing Customers:
  - Target:



 In this example, the New customers have a total invoice value of 17250, the Existing customers currently have 0 (zero) invoice value, the Target for this salesman is a total invoice value of 12500 per 1 month.



## **VIEW ORDERS MONTH PERFORMANCE**

- 1. Hover over the *Orders* section of the bar chart to bring up the Orders information box.
- 2. Each type of Order value will be listed:
  - New Customers:
  - Existing Customers:
  - Target:



In this example, the New customers have a total order value of 0 (zero), the Existing customers currently have 1960 order value, the Target for this salesman is a total order value of 13250 per 1 month.

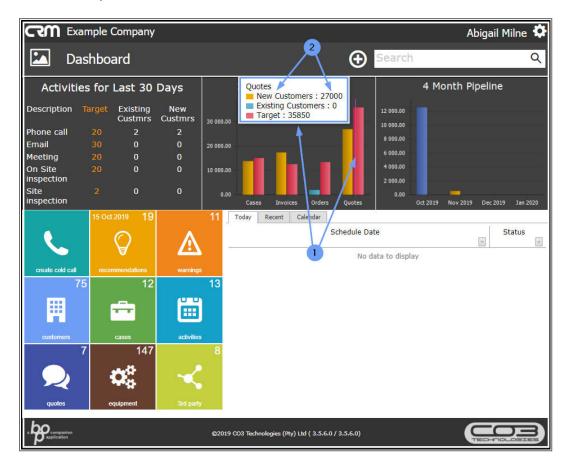


## **VIEW QUOTES MONTH PERFORMANCE**

- 1. Hover over the *Quotes* section of the bar chart to bring up the Quotes information box.
- 2. Each type of Quote value will be listed:
  - New Customers:
  - Existing Customers:
  - Target:



 In this example, the New customers have a total quote value of 27000, the Existing customers currently have 0 (zero) quote value, the Target for this salesman is a total quote value of 35850 per 1 month.



# VIEW INDIVIDUAL PERFORMANCE TYPE SUMMARY

- 1. *Single click* on any <u>individual</u> bar in the chart to display an information box for that particular performance type and customer type.
  - In this example, the *Invoices: New Customers* type bar was selected.
- 2. You will still be able to hover over other parts of the bar chart to bring up to bring up the relevant performance type information box.



	ample Company		Abigail Milne 🌣			
🔼 Da	shboard	2	Search	۹		
	es for Last 30 Target Existing Custmrs 20 2 30 0 20 0 20 0 20 0 20 0	Days New Custmrs 2 0 20 000.00 0 10 000.00 0 0 0 0 0 0 0 0 0 0 0 0	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0			
create cold call	<b>—</b>		Today Recept Calendar Schedule Date No data to display	Status IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII		
customers	7 147	activities 8 3rd party ©2015	9 CO3 Technologies (Pty) Ltd ( 3.5.6.0 / 3.5.6.0)			

# VIEW PERFORMANCE SUMMARY IN THE CUSTOMER HOMEPAGE

- 1. In the *Homepage*,
- 2. Click on the *Customers* tile.



CCM Example Company Abigail Milne 🌣							
🔼 Das	hboard	<b>—</b> 1	🕀 Search	Q			
Activities for Last 30 Days			1 Month Performance 4 I	Month Pipeline			
Phone call	Existing Custmr 20 2 30 0 20 0 20 0		12 000.00 20 000.00 10 000.00 10 000.00 10 000.00 20 000.00 10 000.00				
Site inspection	2 0	0	0.00 Cases Invoices Orders Quotes Oct 201	9 Nov 2019 Dec 2019 Jan 2020			
create cold call	recommendations	9	11 J Today Recent Calendar Schedule Date	Status			
75	cases	2 activities	13				
quotes	14	7	8				
a boo companion application			©2019 CO3 Technologies (Pty) Ltd ( 3.5.6.0 / 3.5.6.0)				

- 1. The *Customers* listing page will open.
- 2. Click on the selected *Customer icon* in the *View* column.



CCM Example Company Abigail Milne 🎗										
Ħ	Custome	ers ┥	-0						÷ 🖪	I Ç
	Type Customer name search filter here							٩		
View	Customer	Code	Contact	Contact phone	Contact email	Complet	Status	Rank	Active	Ca Cont
?	ABC SHoe Co	ABCXYZ12	58			8%	Active	Gold	Yes	No
?	ABI Goods	ABI0001	Lucy	0810235036	5	50%	New - CRM	Metal	No	Yes
?	Another new customer	ANO0001				8%	Active		No	No
?	Apple Juice Inc	APP0001	Duncan McCreddie			50%	Active	Gold	Yes	Yes
?	Bearing and Shoe	BEA001				25%	Active	Metal	No	No
?	Bernies Builders	BER0001				8%	Active		No	No
?	Betties Summer Shop at the Beach	BET0001	Bettie Summervel	031 123 450	E	50%	Active	Gold	No	Yes
?	Big Bargains	BIG0001				8%	Active		Yes	No
?	Billys Barn	BIL0001				8%	Active		No	No
?	Bits and Bytes	BIT001				8%	Active		No	No
Page 1 of	f 8 (74 items) < [1] 2	3456	Z 8 > All						Page size	: 10 [
									01012000000	

- 1. The selected *Customer* homepage will open.
- 2. Here you can view the [] Month Performance chart.

You can follow the same processes as set out above to:

- View the <u>Cases</u> Performance Summary
- View the <u>Invoices</u> Performance Summary
- View the <u>Orders</u> Performance Summary
- View the <u>Quotes</u> Performance Summary
- View the <u>Individual</u> Performance Type Summary





CRM.000.008