

CRM BASICS

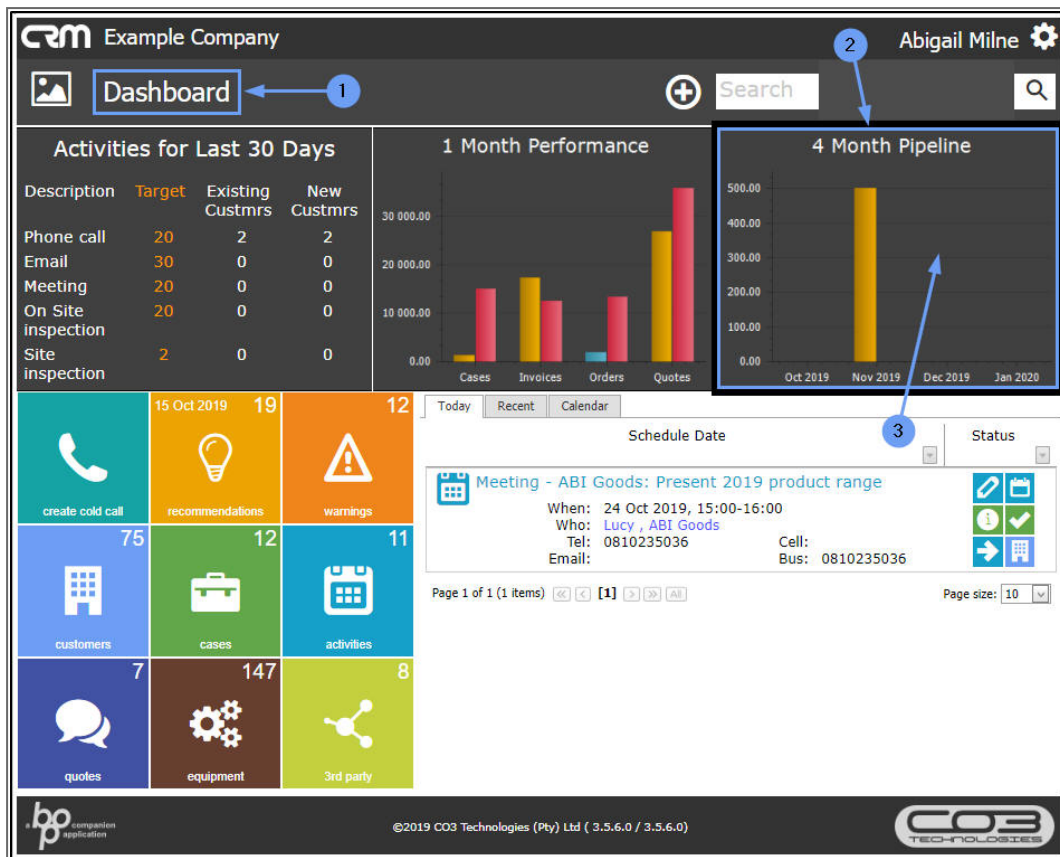
3 MONTH PIPELINE SUMMARY

In this frame you can view a graph of your Pipeline based on your active Cases. Pipeline months are set to 3 months by default, but this can be con-
figured as per your company requirements. VAT is not displayed in the pipeline.

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

VIEW PIPELINE IN HOMEPAGE

1. In the CRM *Homepage*,
2. you can view the [] *Month Pipeline* frame.
 - **Note:** Pipeline months are set to 3 months by default, but can be configured as per your company requirements. In this example, the pipeline months have been set to **4**.
3. Click anywhere in this frame.



VIEW PIPELINE REPORT PAGE

1. A [] *Months Pipeline* report page will open.
2. Here you can view the enlarged **bar graph** with corresponding **key code**,
3. and a list of your **cases** with the pertinent **case information** displayed.



1. **Hover anywhere** over a selected bar in the chart to display a related **information box**.
 - In this example, the bar represents **Cases Closed - Won** and the amount is **7000**.

VIEW CUSTOMER FROM PIPELINE PAGE

2. Click on a **customer name** in the **Customer** column.

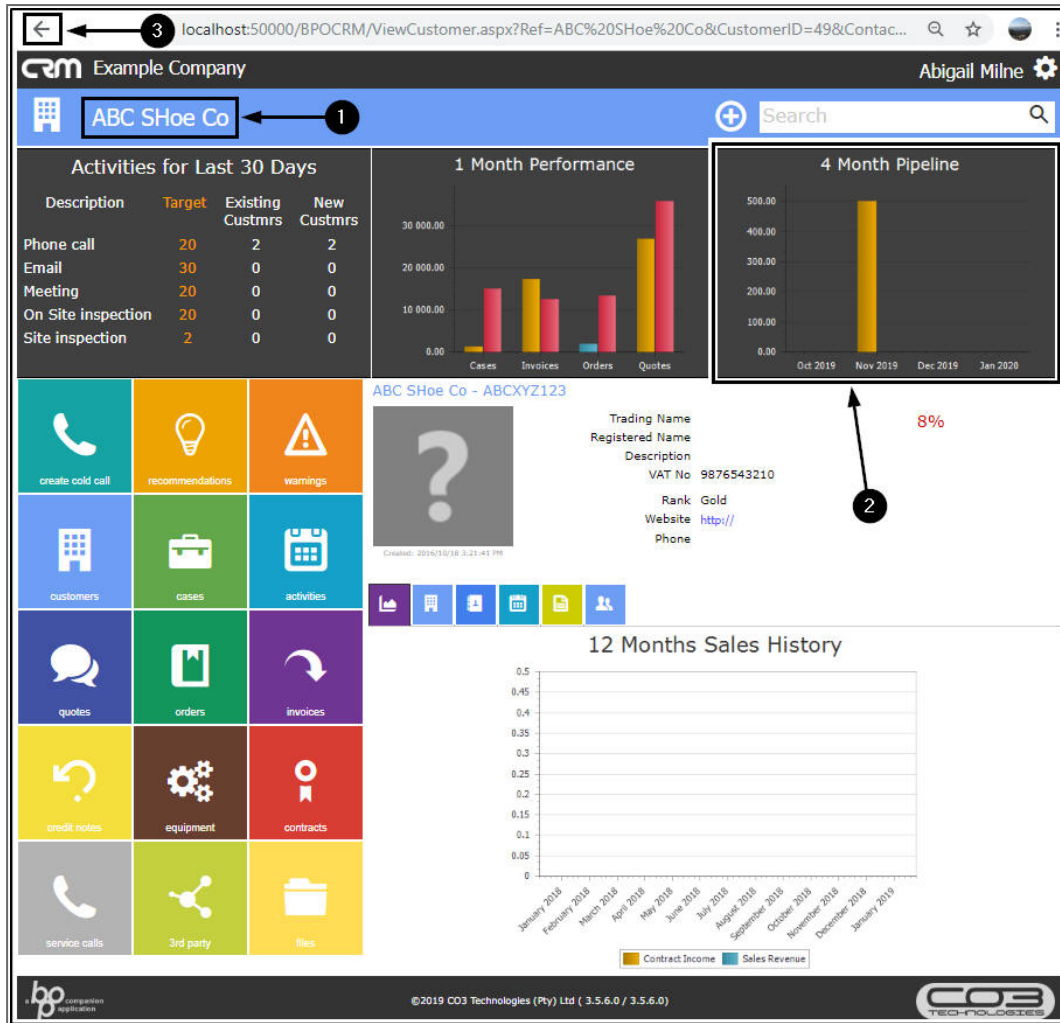


1. The **Customer Homepage** will open.

Refer to [Introduction to the Customer Homepage](#) for more information.

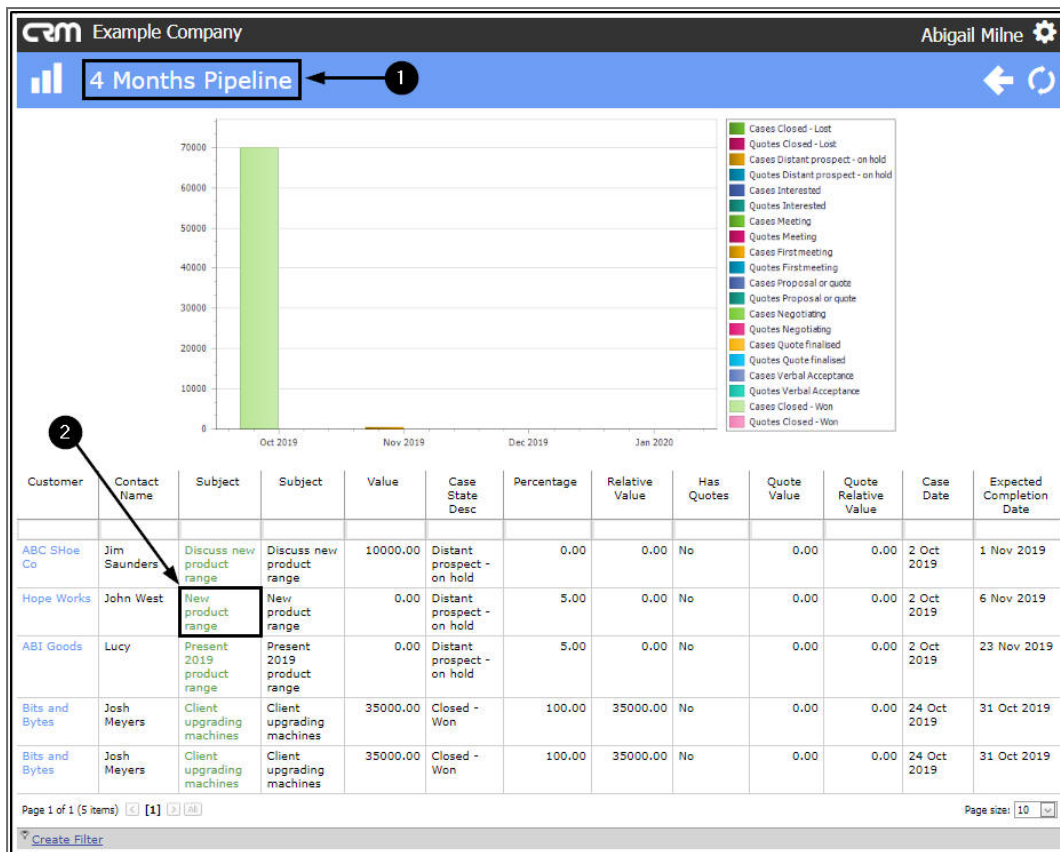
2. You can also view the [] Month Pipeline frame in this page.

3. Click on the **Back** arrow to return to the [] Months Pipeline page.



VIEW CASE FROM PIPELINE PAGE

1. In the [] *Months Pipeline* page,
2. Click on a **case** in the Case **Subject** column.



1. The **Save Case** page will open.

Refer to **Introduction to Cases** for more information.

Either,

2. Click on the **Customer icon** to return to the Customer Dashboard (Home page),
3. or click on the **Back** button,
4. or the **left arrow** to return to the previous page.

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