

## CRM BASICS

### RECOMMENDATIONS

Recommendations are notifications that that you can view and follow up on. For example, you may receive a notification that a Rank Call is due, or a contract is about to expire or contact's birthday is coming up. These notifications will trigger the Salesman to take action in response to a Recommendation. For example, he may email the customer to wish them a happy birthday or send a competitive quote to a customer whose third party contract is about to expire. Both of these response actions improve relationship with the customer, who in turn may increase the customers faith in the Salesman to 'look after' them thereby increasing business potential.

You can configure which Recommendation Types to use from within **BPO**.

### CRM RECOMMENDATION ENGINE

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- The **CRM Recommendation Engine** must be installed and configured on the server, and be set up to run nightly via the **Windows Task Scheduler**.
- A full list of Recommendations can be accessed from the **Dashboard (Home page)**. Client specific Recommendations can be accessed from the **Customer Home page**.

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

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## ACCESS RECOMMENDATIONS FROM CRM HOMEPAGE

1. In the **Dashboard** (Home page),
2. Click on the **Recommendations** tile.
3. The **date** in the top left of the tile indicates the last time that Recommendations were generated.
4. The **number** in the top right indicated the number of current, pending Recommendations.



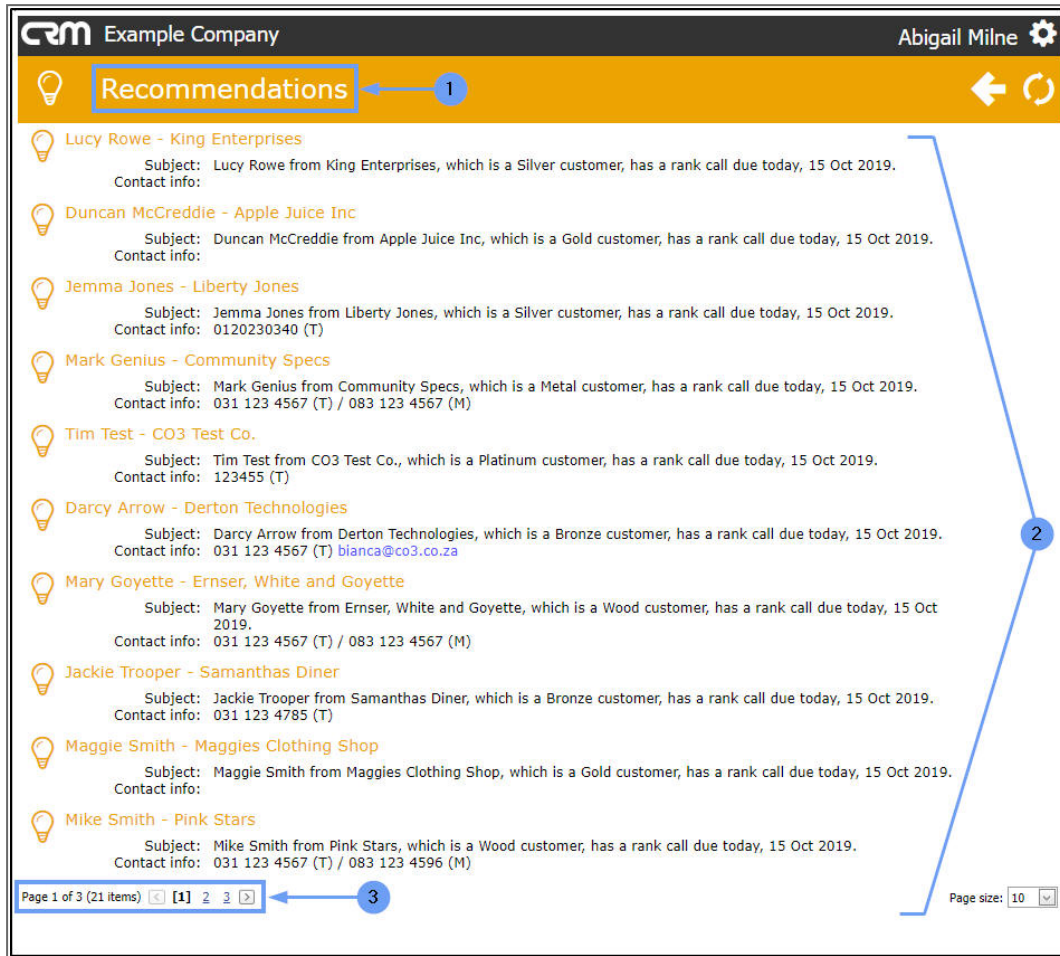
The screenshot shows the CRM Dashboard for 'Example Company' with user 'Abigail Milne'. The dashboard includes a 'Dashboard' tab (1), a search bar, and several charts: 'Activities for Last 30 Days', '1 Month Performance', and '4 Month Pipeline'. The 'Activities for Last 30 Days' table shows the following data:

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	2	2
Email	30	0	0
Meeting	40	0	0
On Site inspection	50	0	0
Site inspection	2	0	0

The 'Recommendations' tile (2) is highlighted, showing a date of '15 Oct 2019' (3) and a count of '23' (4). The 'Warnings' tile shows a count of '10'. The 'Phone call - King Copiers: Call client to conform meeting time' entry is visible in the right sidebar.

1. The **Recommendations** page will open.
2. Here you can view a list of all the current, pending Recommendations for all the customers on the system.

- Note the **Page Reference field** which gives you an indication of the amount of Recommendations and which page you are on.



**CRM Example Company** Abigail Milne

**Recommendations** 1

- Lucy Rowe - King Enterprises**  
Subject: Lucy Rowe from King Enterprises, which is a Silver customer, has a rank call due today, 15 Oct 2019.  
Contact info:
- Duncan McCreddie - Apple Juice Inc**  
Subject: Duncan McCreddie from Apple Juice Inc, which is a Gold customer, has a rank call due today, 15 Oct 2019.  
Contact info:
- Jemma Jones - Liberty Jones**  
Subject: Jemma Jones from Liberty Jones, which is a Silver customer, has a rank call due today, 15 Oct 2019.  
Contact info: 0120230340 (T)
- Mark Genius - Community Specs**  
Subject: Mark Genius from Community Specs, which is a Metal customer, has a rank call due today, 15 Oct 2019.  
Contact info: 031 123 4567 (T) / 083 123 4567 (M)
- Tim Test - CO3 Test Co.**  
Subject: Tim Test from CO3 Test Co., which is a Platinum customer, has a rank call due today, 15 Oct 2019.  
Contact info: 123455 (T)
- Darcy Arrow - Derton Technologies**  
Subject: Darcy Arrow from Derton Technologies, which is a Bronze customer, has a rank call due today, 15 Oct 2019.  
Contact info: 031 123 4567 (T) [bianca@co3.co.za](mailto:bianca@co3.co.za)
- Mary Goyette - Ernser, White and Goyette**  
Subject: Mary Goyette from Ernser, White and Goyette, which is a Wood customer, has a rank call due today, 15 Oct 2019.  
Contact info: 031 123 4567 (T) / 083 123 4567 (M)
- Jackie Trooper - Samanthas Diner**  
Subject: Jackie Trooper from Samanthas Diner, which is a Bronze customer, has a rank call due today, 15 Oct 2019.  
Contact info: 031 123 4785 (T)
- Maggie Smith - Maggies Clothing Shop**  
Subject: Maggie Smith from Maggies Clothing Shop, which is a Gold customer, has a rank call due today, 15 Oct 2019.  
Contact info:
- Mike Smith - Pink Stars**  
Subject: Mike Smith from Pink Stars, which is a Wood customer, has a rank call due today, 15 Oct 2019.  
Contact info: 031 123 4567 (T) / 083 123 4596 (M)

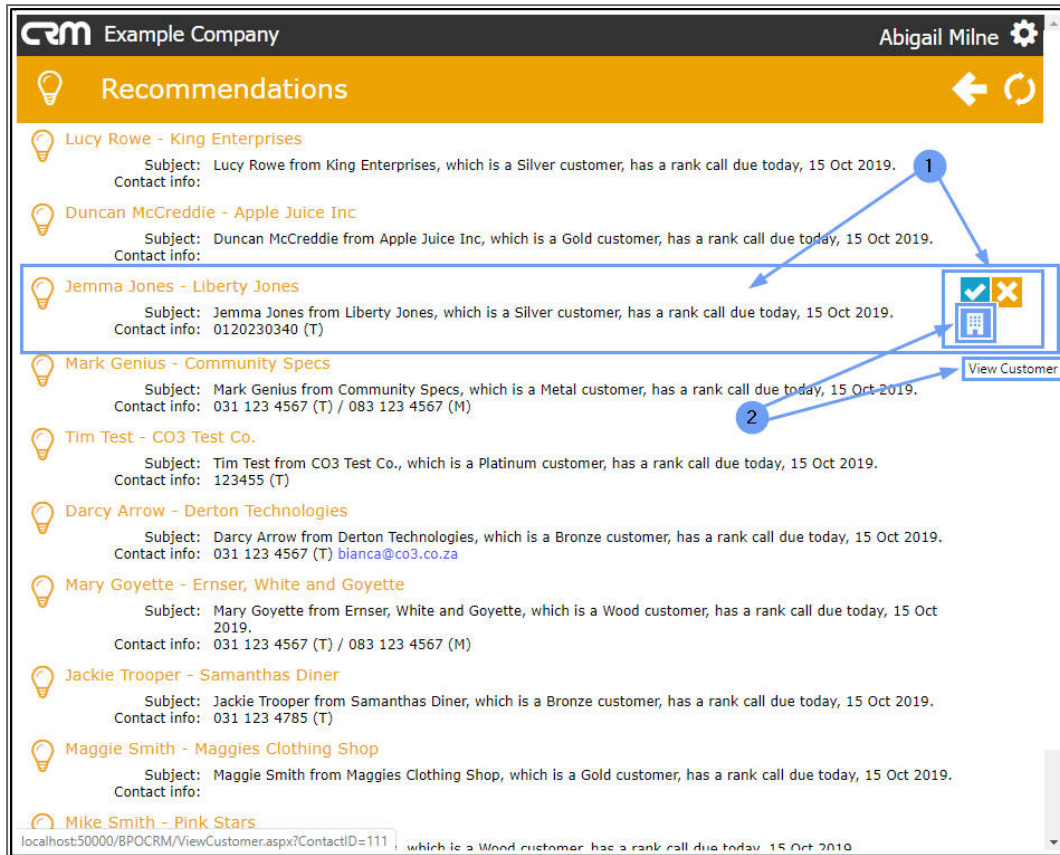
Page 1 of 3 (21 items) [1] 2 3 2 3

Page size: 10

## RECOMMENDATION ACTION BUTTONS

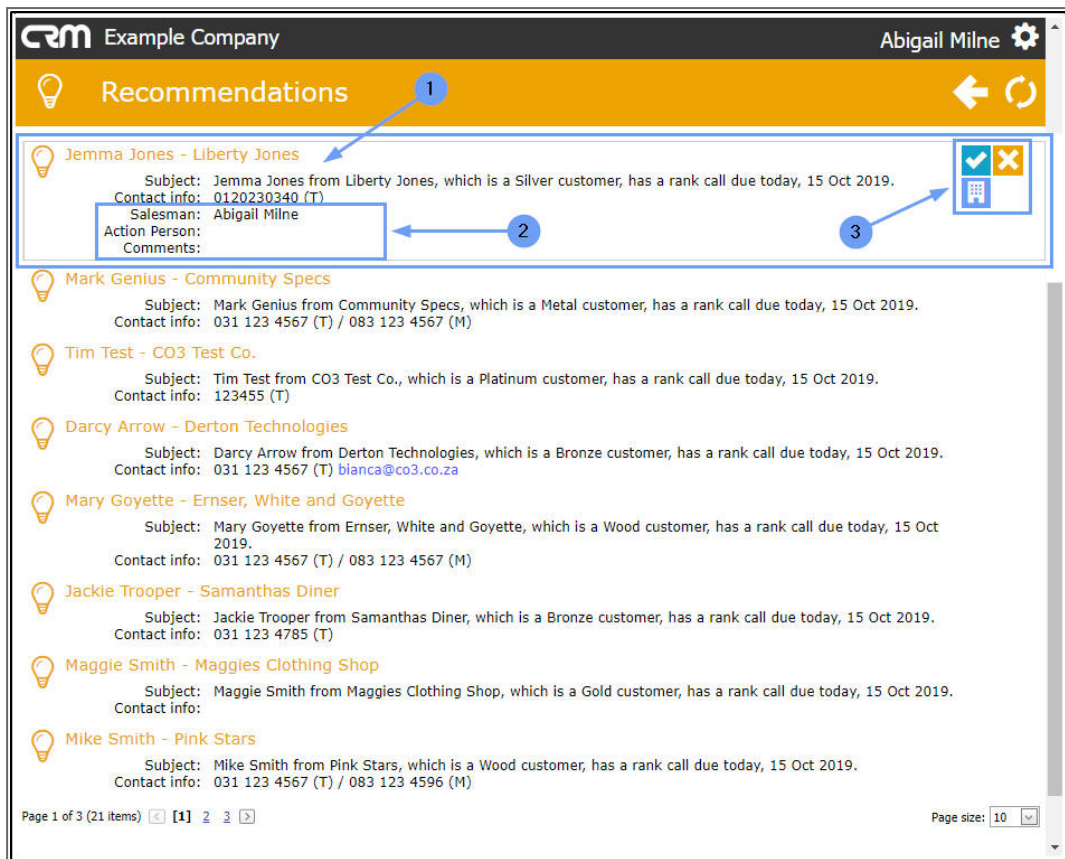
- Hover anywhere over a selected Recommendation frame to display the Recommendation **Action buttons**:
  - Create a new activity for this Recommendation**
  - Reject this Recommendation**
  - View Customer**
- Hover over** a specific Action button to display that button description:

**Note:** You can single click on the Recommendation frame to keep the Action buttons consistently displayed in this frame.



## VIEW EXTRA INFORMATION

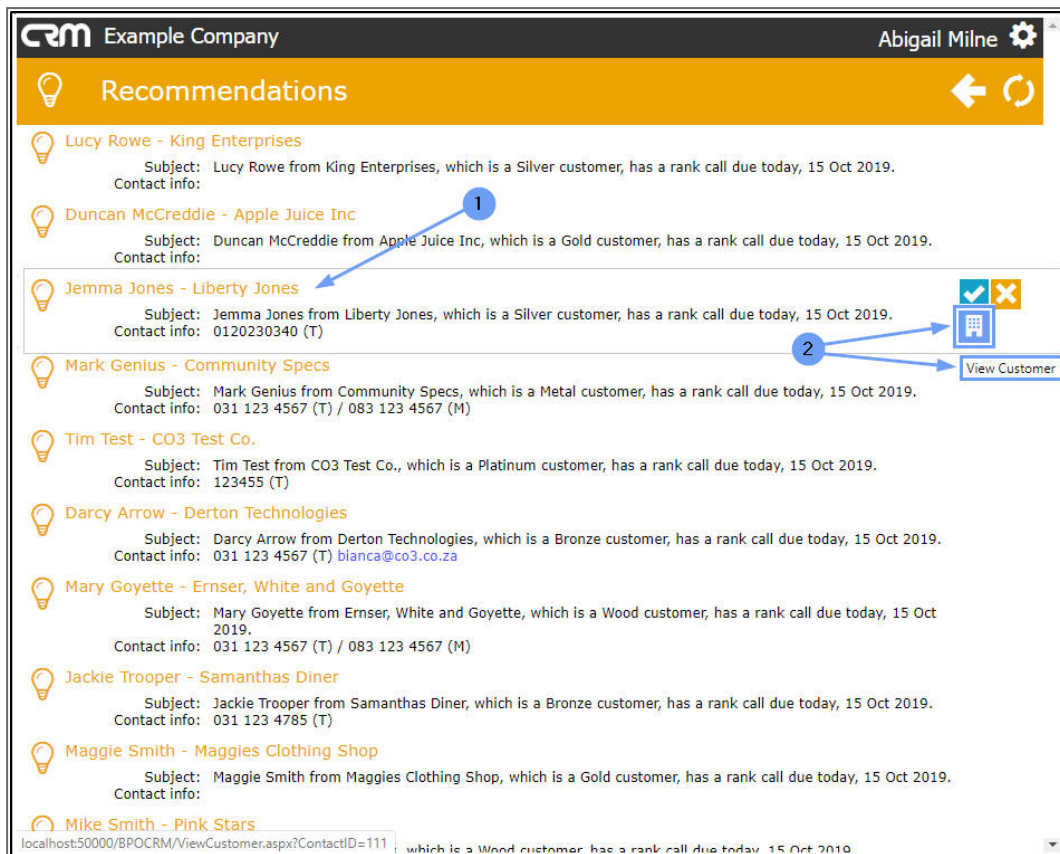
1. **Single click** on a Recommendation.
2. The selected Recommendation frame will **expand** to show extra information:
  - The **Salesman**
  - The **Action Person** and
  - The **Comments** linked to this Recommendation.
3. The Recommendation **Action buttons** will also now be consistently displayed in this frame.



## SELECT A RECOMMENDATION ACTION BUTTON

### VIEW CUSTOMER

1. In the selected Recommendation frame,
2. Click on the **View Customer** action button.



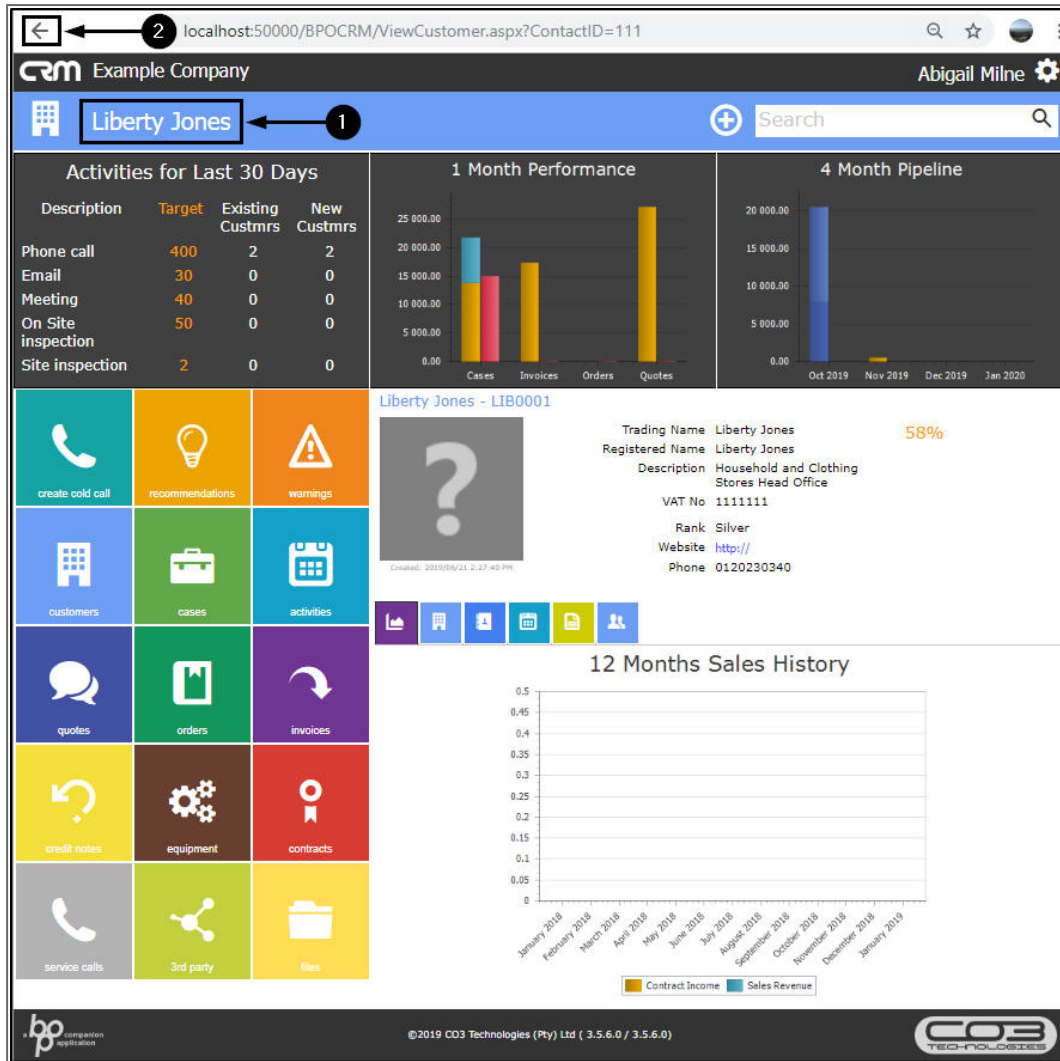
**CRM Example Company** Abigail Milne

## Recommendations

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Subject: Lucy Rowe from King Enterprises, which is a Silver customer, has a rank call due today, 15 Oct 2019.  
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Subject: Jemma Jones from Liberty Jones, which is a Silver customer, has a rank call due today, 15 Oct 2019.  
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- Maggie Smith - Maggies Clothing Shop**  
Subject: Maggie Smith from Maggies Clothing Shop, which is a Gold customer, has a rank call due today, 15 Oct 2019.  
Contact info:
- Mike Smith - Pink Stars**  
Subject: Mike Smith from Pink Stars, which is a Wood customer, has a rank call due today, 15 Oct 2019.  
Contact info:

localhost:50000/BPOCRM/ViewCustomer.aspx?ContactID=111

1. The **Customer Home page** will open.
  - Review **CRM Basics: Customers** for more information regarding this page.
2. Click on the **Back** arrow to return to the previous (Recommendations listing) page.



**CRM Example Company** Abigail Milne

**Liberty Jones** Search

**Activities for Last 30 Days**

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	2	2
Email	30	0	0
Meeting	40	0	0
On Site	50	0	0
Site inspection	2	0	0

**1 Month Performance**

**4 Month Pipeline**

**Liberty Jones - LIB0001**

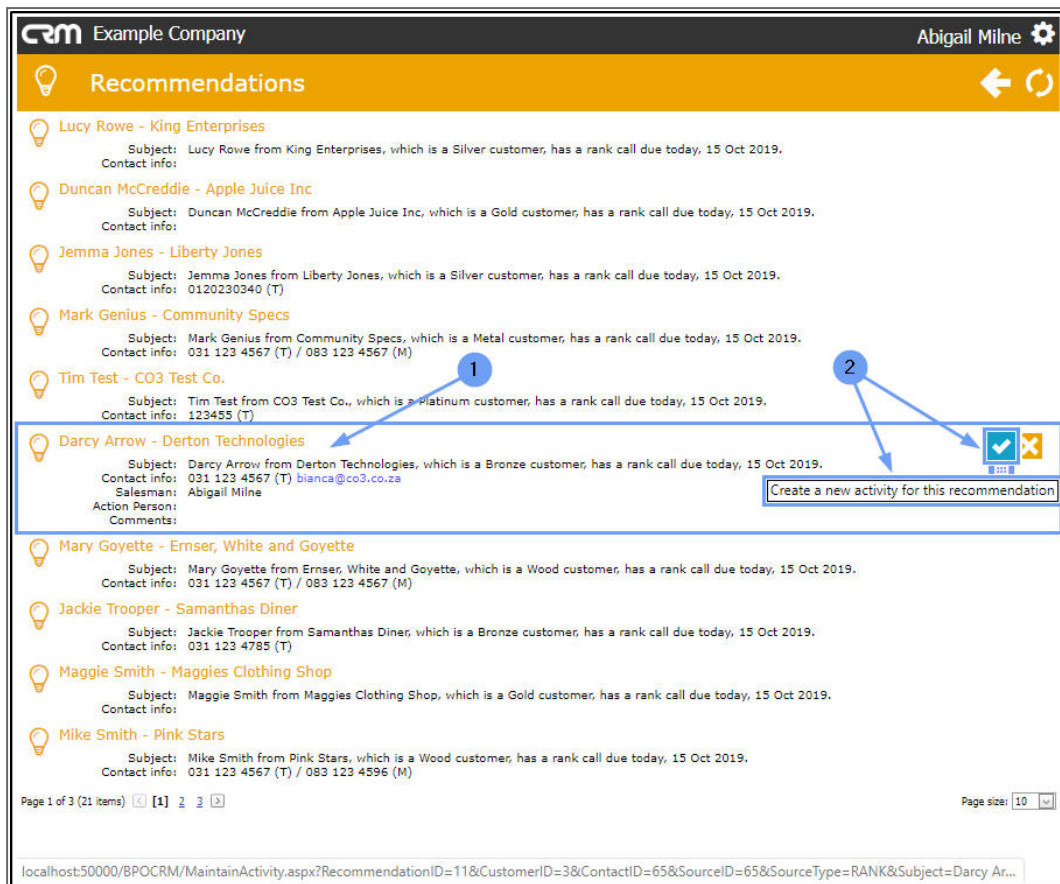
Trading Name: Liberty Jones  
Registered Name: Liberty Jones  
Description: Household and Clothing Stores Head Office  
VAT No: 1111111  
Rank: Silver  
Website: <http://>  
Phone: 0120230340

**12 Months Sales History**

Contract Income Sales Revenue

## CREATE ACTIVITY FOR RECOMMENDATION

1. In the selected Recommendation frame,
2. Click on the **Create a new activity for this Recommendation** action button.



**CRM Example Company** Abigail Milne

## Recommendations

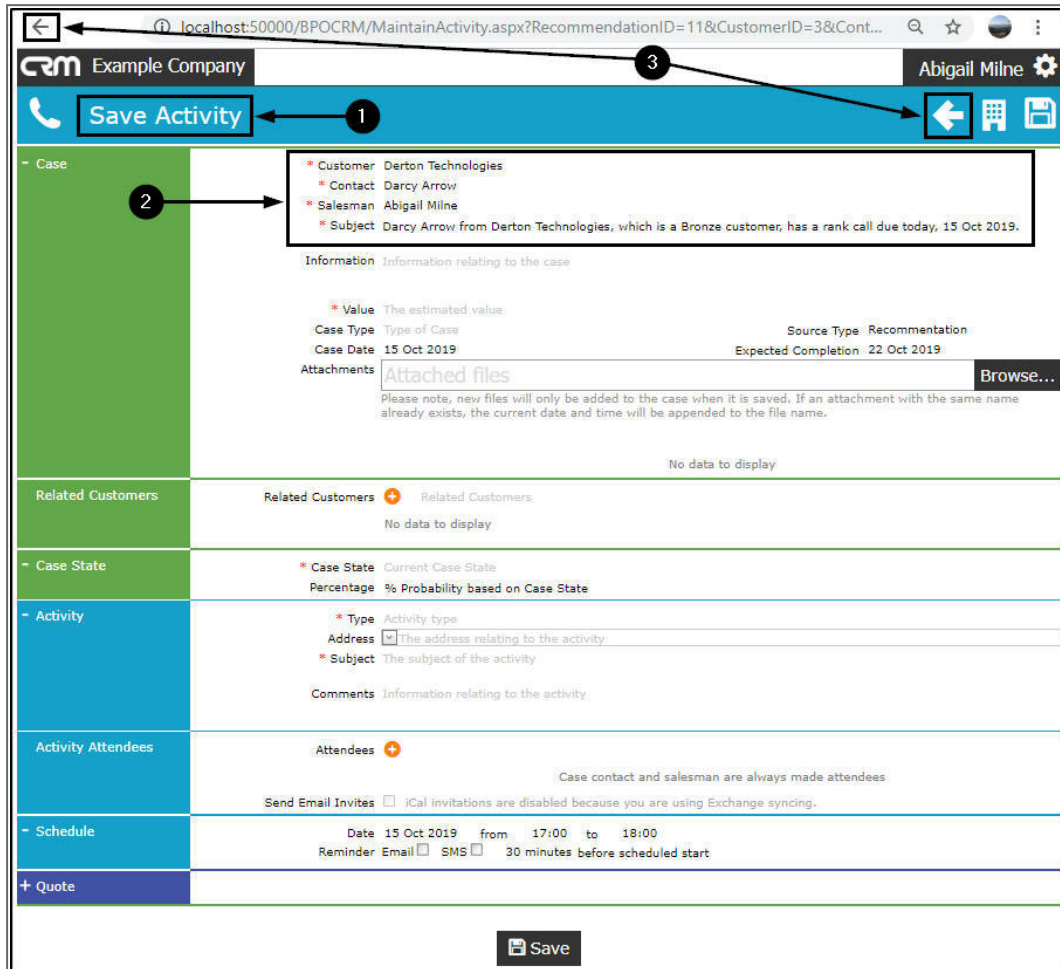
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- Darcy Arrow - Derton Technologies**  
Subject: Darcy Arrow from Derton Technologies, which is a Bronze customer, has a rank call due today, 15 Oct 2019.  
Contact info: 031 123 4567 (T) bianca@co3.co.za  
Salesman: Abigail Milne  
Action Person:  
Comments:
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Subject: Mary Goyette from Ernser, White and Goyette, which is a Wood customer, has a rank call due today, 15 Oct 2019.  
Contact info: 031 123 4567 (T) / 083 123 4567 (M)
- Jackie Trooper - Samantha's Diner**  
Subject: Jackie Trooper from Samantha's Diner, which is a Bronze customer, has a rank call due today, 15 Oct 2019.  
Contact info: 031 123 4785 (T)
- Maggie Smith - Maggies Clothing Shop**  
Subject: Maggie Smith from Maggies Clothing Shop, which is a Gold customer, has a rank call due today, 15 Oct 2019.  
Contact info:
- Mike Smith - Pink Stars**  
Subject: Mike Smith from Pink Stars, which is a Wood customer, has a rank call due today, 15 Oct 2019.  
Contact info: 031 123 4567 (T) / 083 123 4596 (M)

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localhost:50000/BPOCRM/MaintainActivity.aspx?RecommendationID=11&CustomerID=38&ContactID=65&SourceID=65&SourceType=RANK&Subject=Darcy Ar...

1. The **Save Activity** page will open.
2. Certain details in the case frame will be auto populated:
  - **Customer:** This will be populated with the customer name selected at the beginning of this process.
  - **Contact:** This will be populated with the name of the primary contact linked to this customer.
  - **Salesman:** This will be populated with the name of the sales-man linked to this customer.
  - **Subject:** This will be populated with the subject of the Recommendation as displayed in the Recommendations list-ing page.
  - Review **CRM Basics: Activities** for more information regard-ing this page.

- Click on either of the **Back** arrows to return to the previous (Recommendations listing) page.



The screenshot shows a web browser window with the URL `localhost:50000/BPOCRM/MaintainActivity.aspx?RecommendationID=11&CustomerID=3&Cont...`. The page title is "CRM Example Company" and the user is "Abigail Milne".

Callout 1 points to the "Save Activity" button in the top blue bar.

Callout 2 points to the "Case" section, which contains the following information:

- Customer:** Derton Technologies
- Contact:** Darcy Arrow
- Salesman:** Abigail Milne
- Subject:** Darcy Arrow from Derton Technologies, which is a Bronze customer, has a rank call due today, 15 Oct 2019.

Below the case information is the "Information" section, which includes:

- Value:** The estimated value.
- Case Type:** Type of Case
- Case Date:** 15 Oct 2019
- Source Type:** Recommendation
- Expected Completion:** 22 Oct 2019

The "Attachments" section shows "Attached files" with a "Browse..." button. A note states: "Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name."

Below the attachments is the "Related Customers" section, which shows "No data to display".

The "Case State" section shows:

- Case State:** Current Case State
- Percentage:** % Probability based on Case State

The "Activity" section shows:

- Type:** Activity type
- Address:** ☒ The address relating to the activity.
- Subject:** The subject of the activity
- Comments:** Information relating to the activity.

The "Activity Attendees" section shows:

- Attendees:**
- Send Email Invites:** ☐ iCal invitations are disabled because you are using Exchange syncing.

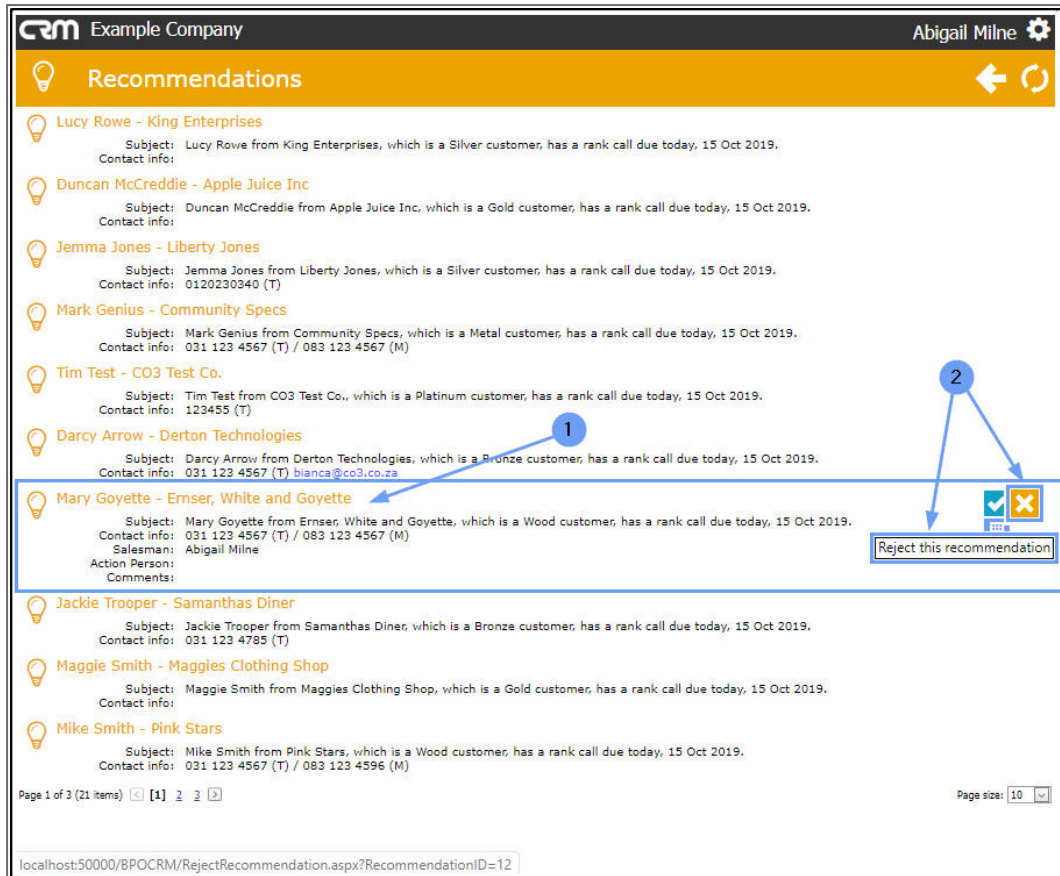
The "Schedule" section shows:

- Date:** 15 Oct 2019
- from:** 17:00
- to:** 18:00
- Reminder:** Email ☐ SMS ☐ 30 minutes before scheduled start

The "Quote" section is at the bottom, with a "Save" button.

## REJECT RECOMMENDATION

- In the selected Recommendation frame,
- Click on the **Reject this recommendation** action button.



**CRM Example Company** Abigail Milne

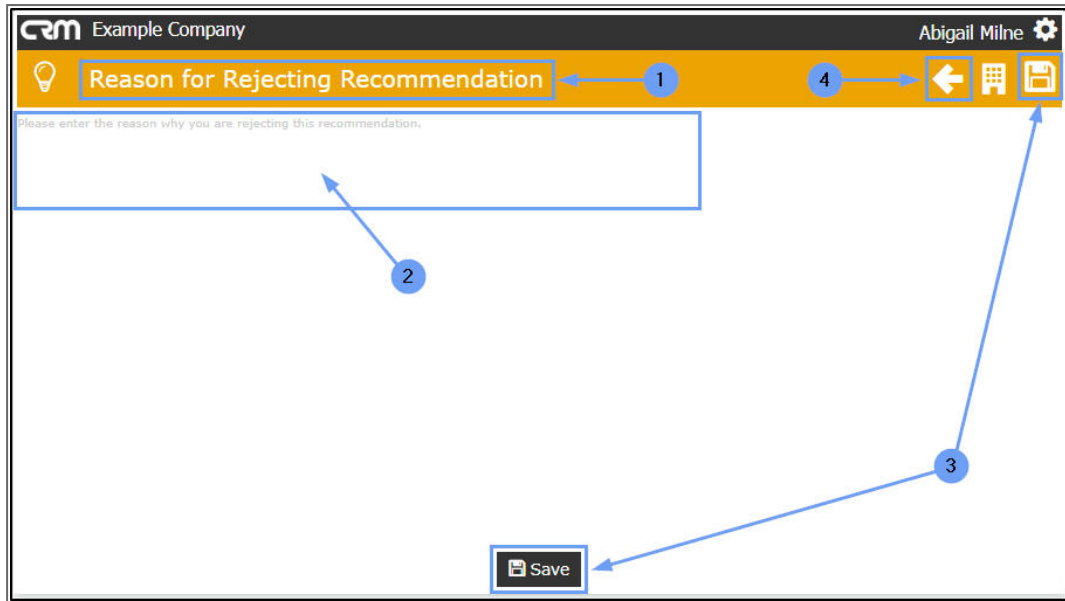
## Recommendations

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Subject: Mike Smith from Pink Stars, which is a Wood customer, has a rank call due today, 15 Oct 2019.  
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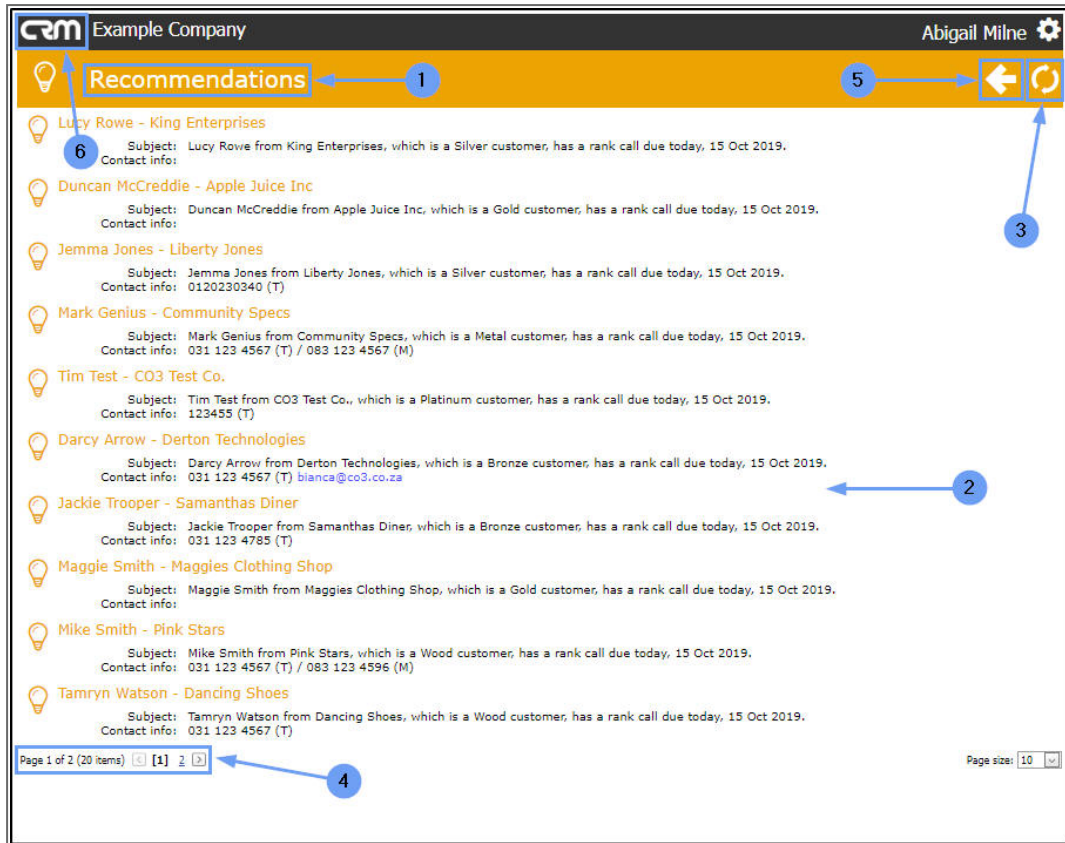
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localhost:50000/BPOCRM/RejectRecommendation.aspx?RecommendationID=12

1. The **Reason for Rejecting Recommendation** page will open.
2. In the text box, type in the **explanation** for the Recommendation being rejected.
3. Click on **Save**.
4. **Note:** If you do not wish to reject the comment, click on the **Back** button to return to the previous page.



1. If you **saved** the rejection, you will return to the **Recommendations** (listing) page.
2. The rejected Recommendation will be **removed** from the list.
3. You may need to **refresh** the page to remove it.
4. Note that the **Page Reference** field adjusts to reflect the new amount of Recommendations.
5. Click on either the **Back** button or the
6. **CRM logo** to return to the **Dashboard** (Home page).



## CUSTOMER-SPECIFIC LIST OF RECOMMENDATIONS

- You can access a **customer-specific list of Recommendations** from a selected Customer Home page.

## RECOMMENDATIONS CONFIGURATION

- These CRM Recommendations are **set up in the Configurator**.

CRM.000.010