

CRM BASICS

WARNINGS

Warnings are notifications of **overdue** activities, that can be directly actioned from the Warnings page using the Activity Action buttons.

A full list of warnings for all Customers can be accessed from the Homepage as set out below.

Client-specific warnings can be accessed from the from the Customer Homepage.

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

ACCESS WARNINGS FROM HOME PAGE

1. In the **Dashboard** (Home page),
2. Click on the **Warnings** tile.
3. **Note:** The number in the top right of this tile indicates how many warnings are pending in total for all customers.



WARNINGS PAGE – ALL CUSTOMERS

1. The **Warnings** page will open.
2. Here you can view a list of all the warnings, for all customers - where you have activities pending.

LIST OF ACTIVITIES PENDING

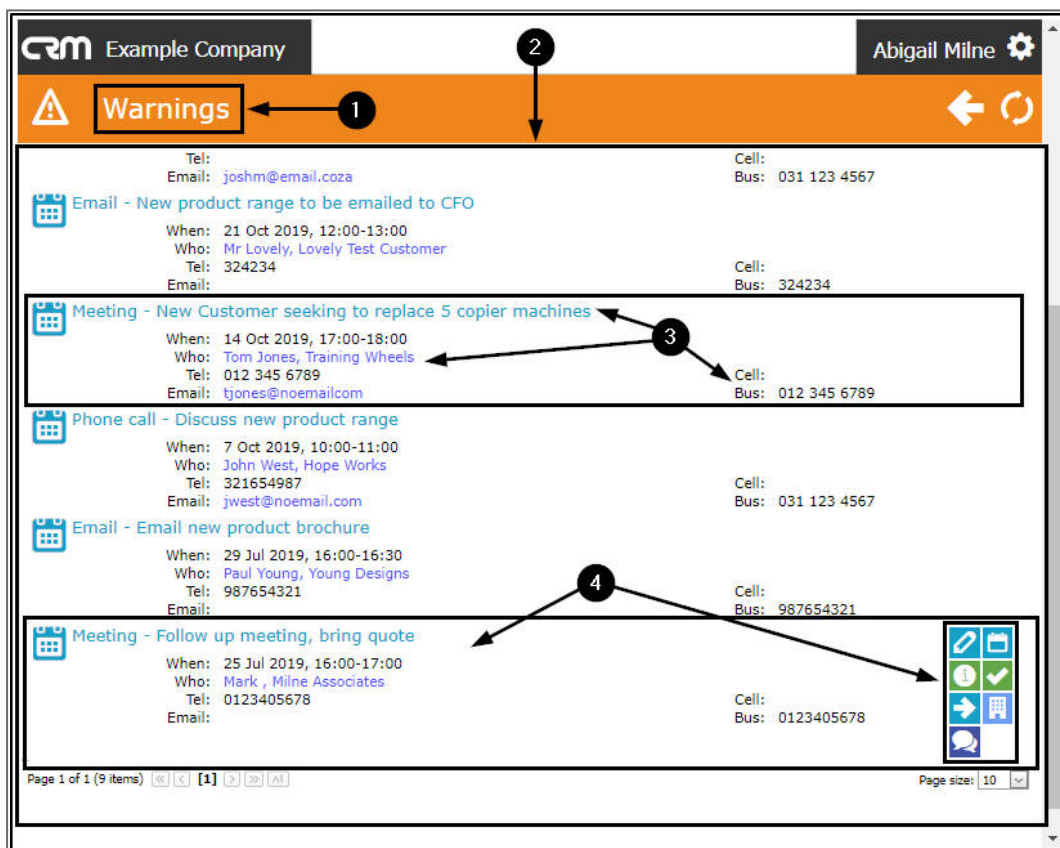
3. Each warning lists:
 - The activity **subject**
 - **When** the activity was scheduled for
 - **Who** the activity was scheduled with
 - **Contact details** for the activity:

- Tel:
- Email:
- Cell:
- Business No:

ACTIVITY ACTION BUTTONS

4. Hover over any activity to reveal the Activity **Action Buttons**:

- **View / Edit this Activity**
- **Reschedule this Activity**
- **View Case info and history**
- **Close this case**
- **Next Action** (close current Activity and create new Activity)
- **View customer**
- **New Quote**



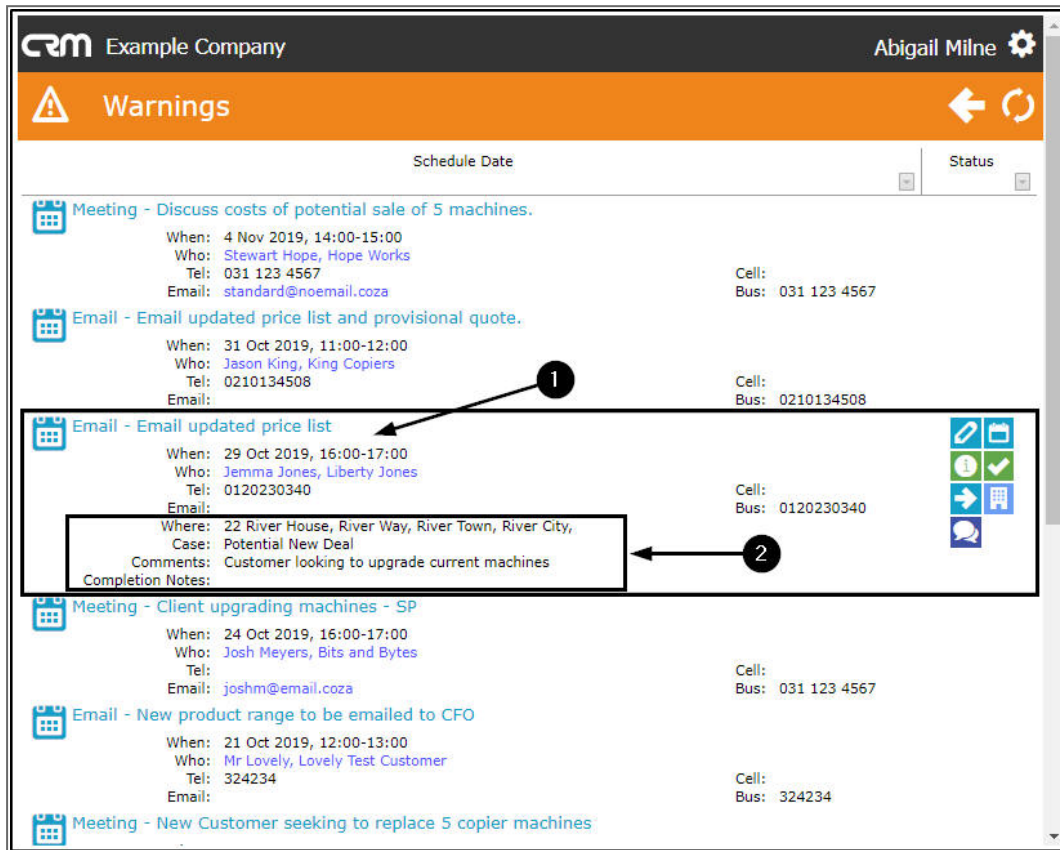
The screenshot displays the 'Warnings' section of a CRM interface for 'Example Company'. The header bar is orange and contains a warning icon, the 'Warnings' title, and navigation arrows. A user profile for 'Abigail Milne' is in the top right. The main area lists five activities, each with a calendar icon, title, date/time, and contact details. Callouts are numbered as follows:

- 1**: Points to the 'Warnings' header.
- 2**: Points to the top navigation bar.
- 3**: Points to the 'Meeting - New Customer seeking to replace 5 copier machines' activity entry.
- 4**: Points to the 'Meeting - Follow up meeting, bring quote' activity entry, which has a detailed view button (a square with a magnifying glass and a list icon) to its right.

At the bottom, there is a pagination bar showing 'Page 1 of 1 (9 items)' and a 'Page size' dropdown set to '10'.

VIEW ACTIVITY SUMMARY

1. **Single click** on any Activity.
2. To access a **summary** of the Activity information.



The screenshot shows the 'Warnings' section of a CRM interface for 'Example Company'. The user 'Abigail Milne' is logged in. The section displays a list of activities with columns for 'Schedule Date' and 'Status'. The third activity, 'Email - Email updated price list', is selected and expanded. The details for this activity are as follows:

- When:** 29 Oct 2019, 16:00-17:00
- Who:** Jemma Jones, Liberty Jones
- Tel:** 0120230340
- Email:** [Redacted]
- Where:** 22 River House, River Way, River Town, River City,
- Case:** Potential New Deal
- Comments:** Customer looking to upgrade current machines
- Completion Notes:** [Redacted]
- Cell:** [Redacted]
- Bus:** 0120230340

SELECT SCHEDULE DATE

You can select / change the **Schedule Date** parameters.

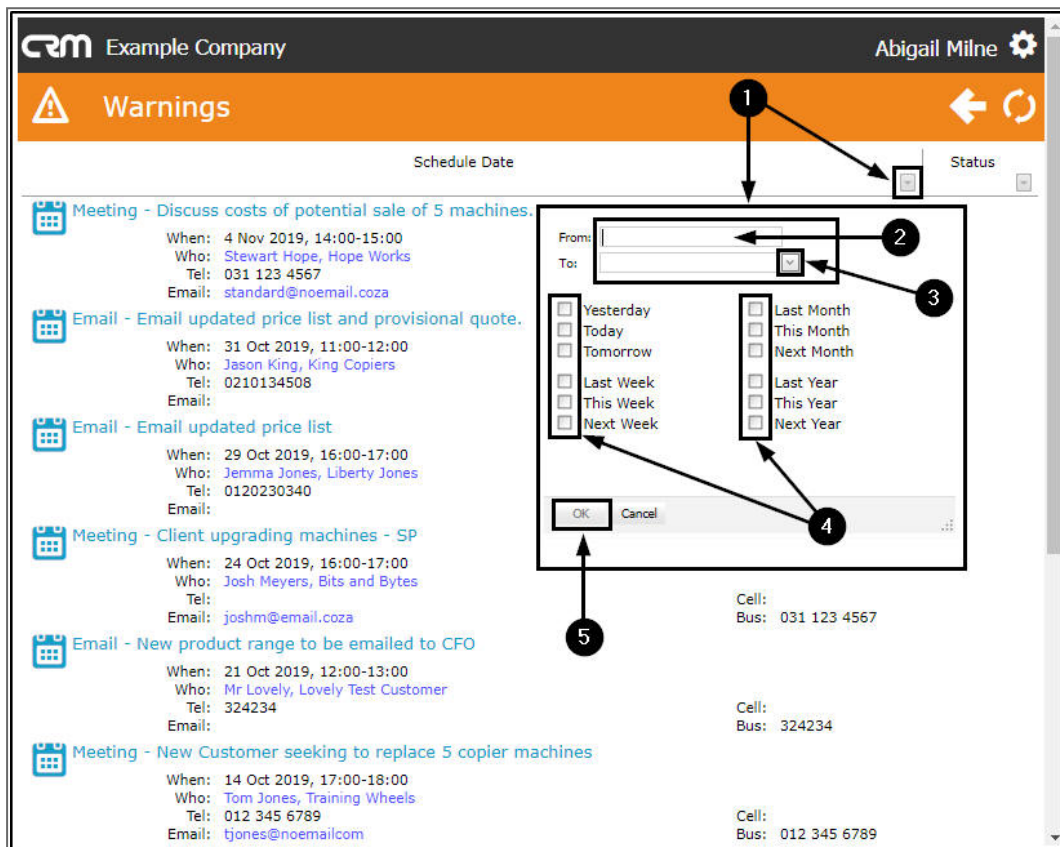
1. Click on the **drop-down arrow** in the **Schedule Date** frame to display the Select Schedule screen.

Either

2. **Type in** the date parameters in the **From** and **To** fields,

Or

3. Click on the **drop-down arrows** in the From and To fields and use the **calendar function** to select the dates.
4. Alternatively, select the **check boxes** that correlate to the time periods that you wish to view. For example, you could select **This Week** and **Last Week**.
5. When you are happy with your selections, click on **OK**.



1. The screen will **refresh** to display only the warnings in the selected date parameters.

SELECT STATUS

You can also select to view the Warnings that are in a particular **Status**.

- Click on the **drop-down arrow** in the **Status** frame to display the Select Schedule screen.

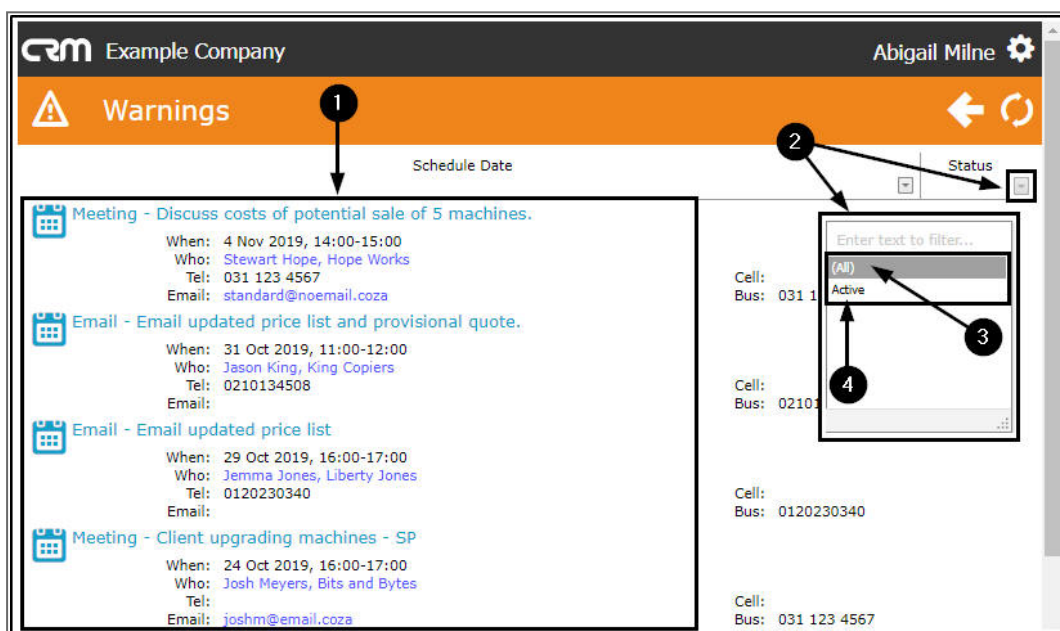
Either

- Select **All** (to view all the warnings pending),

Or

- Select **Active** (to view only the Active warnings).

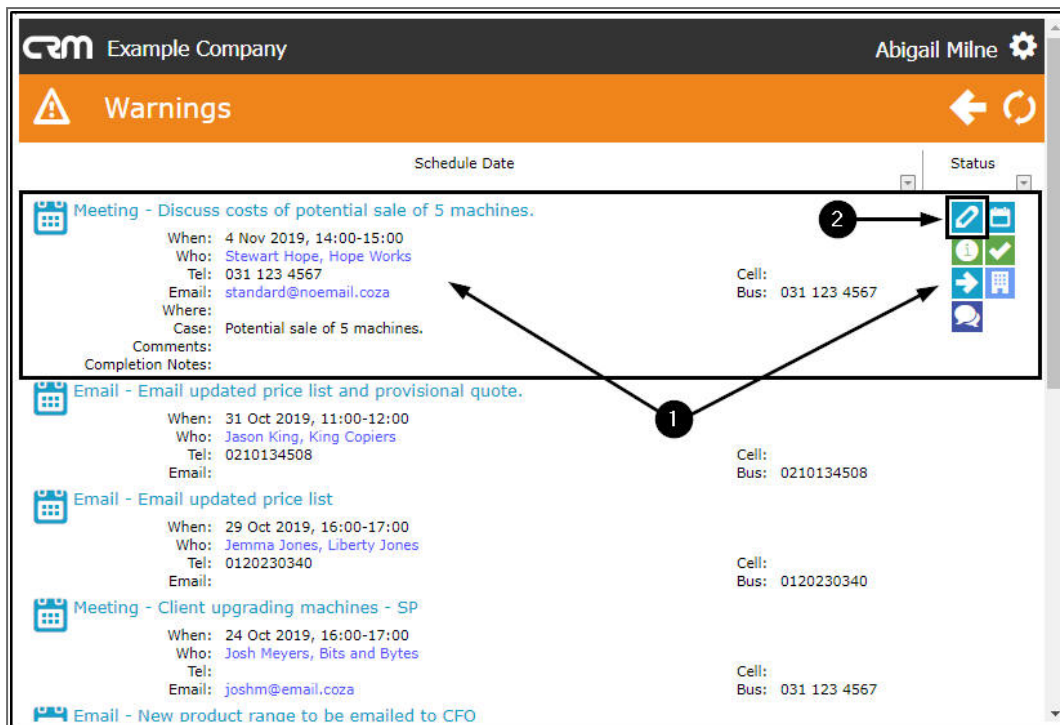
As you click on your choice, the page will **refresh** to display the results of your selection.



ACTIVITY ACTION BUTTONS PROCESSING

VIEW/EDIT THIS ACTIVITY

- Hover over an activity, to reveal the Activity **Action buttons**.
- Click on the **View/Edit this Activity** button.



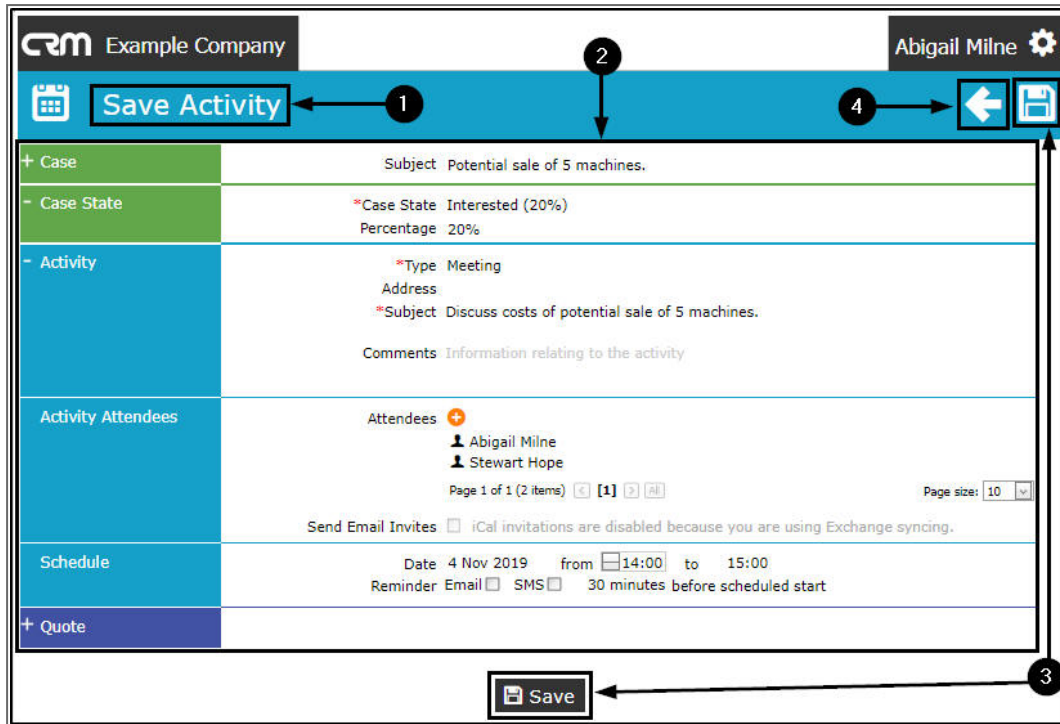
The screenshot shows the 'Warnings' page in a CRM system for 'Example Company'. The page header includes the company name and the user 'Abigail Milne'. Below the header is a navigation bar with a warning icon and the title 'Warnings'. The main content area displays a list of activities, each with a calendar icon and a title. The activities are:

- Meeting - Discuss costs of potential sale of 5 machines.** (When: 4 Nov 2019, 14:00-15:00; Who: Stewart Hope, Hope Works; Tel: 031 123 4567; Email: standard@noemail.co.za; Where: Potential sale of 5 machines; Comments: Completion Notes:)
- Email - Email updated price list and provisional quote.** (When: 31 Oct 2019, 11:00-12:00; Who: Jason King, King Copiers; Tel: 0210134508; Email: Cell: 0210134508)
- Email - Email updated price list.** (When: 29 Oct 2019, 16:00-17:00; Who: Jemma Jones, Liberty Jones; Tel: 0120230340; Email: Cell: 0120230340)
- Meeting - Client upgrading machines - SP.** (When: 24 Oct 2019, 16:00-17:00; Who: Josh Meyers, Bits and Bytes; Tel: joshm@email.co.za; Email: Cell: 031 123 4567)
- Email - New product range to be emailed to CFO.**

Annotations on the screenshot:

- 1**: Points to the 'Save' button (a blue square with a white checkmark) in the top right corner of the activity details panel.
- 2**: Points to the 'Back' button (a blue square with a white left-pointing arrow) in the top right corner of the activity details panel.

1. The **Save Activity** page will open.
2. View and/or Update the Activity details as required.
 - For more information regarding this page refer to **View/Edit an Activity**.
3. Click on **Save** to keep your changes,
4. or the **Back** button to return to the Warnings page.



The screenshot shows a CRM interface for 'Example Company' with a user 'Abigail Milne'. The form is titled 'Save Activity' and contains several sections:

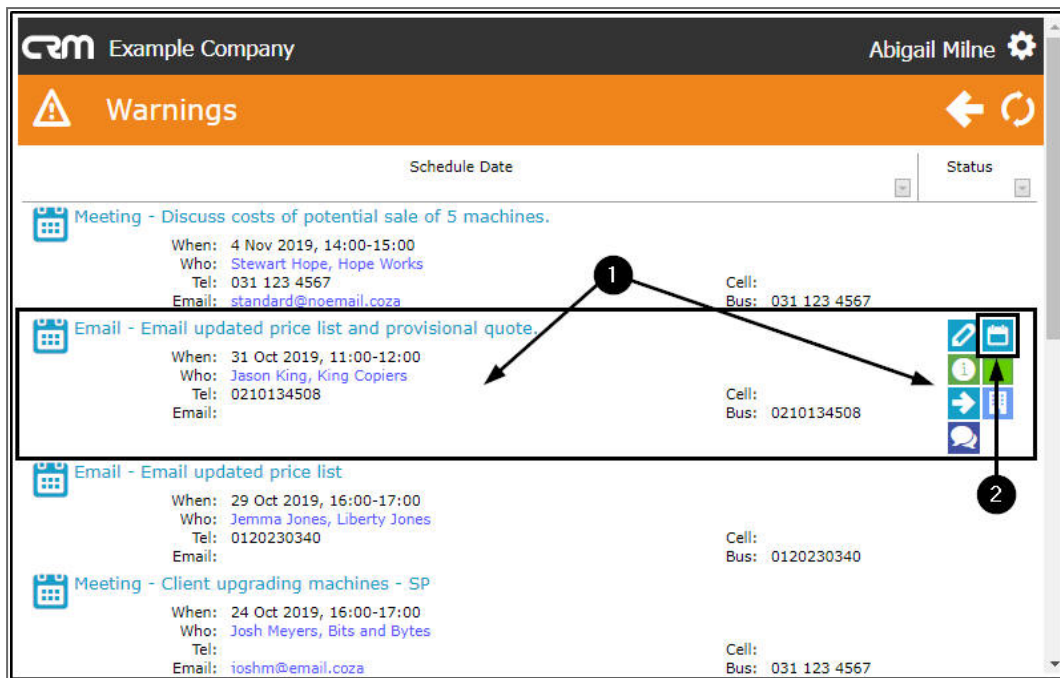
- Case:** Subject: Potential sale of 5 machines.
- Case State:** *Case State: Interested (20%), Percentage: 20%.
- Activity:** *Type: Meeting, Address, *Subject: Discuss costs of potential sale of 5 machines, Comments: Information relating to the activity.
- Activity Attendees:** Attendees: Abigail Milne, Stewart Hope. Page 1 of 1 (2 items). Page size: 10.
- Schedule:** Date: 4 Nov 2019, from 14:00 to 15:00, Reminder: Email, SMS, 30 minutes before scheduled start.
- Quote:**

Numbered callouts indicate the following elements:

- 1: 'Save Activity' button in the top left.
- 2: 'Save Activity' button in the top right.
- 3: 'Save' button at the bottom right.
- 4: 'Save' button in the top right corner.

RESCHEDULE ACTIVITY

- In the Warnings page, hover over an activity, to reveal the **Action buttons**.
- Click on the **Reschedule this Activity** icon



CRM Example Company Abigail Milne

Warnings

Schedule Date Status

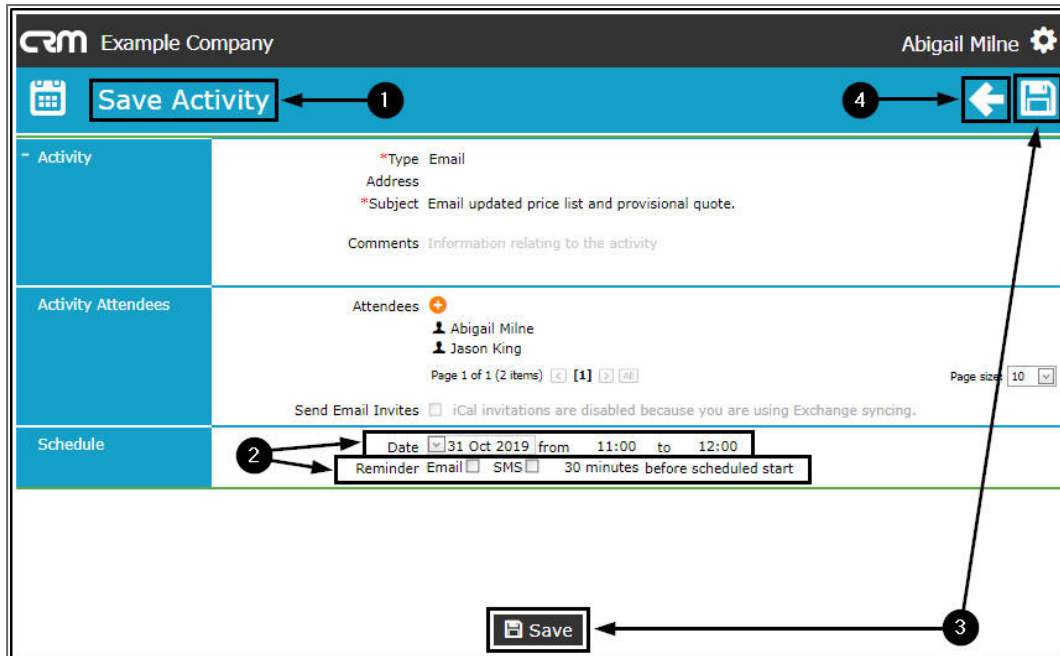
Meeting - Discuss costs of potential sale of 5 machines.
 When: 4 Nov 2019, 14:00-15:00
 Who: Stewart Hope, Hope Works
 Tel: 031 123 4567
 Email: standard@noemail.co.za
 Cell: 031 123 4567
 Bus: 031 123 4567

Email - Email updated price list and provisional quote.
 When: 31 Oct 2019, 11:00-12:00
 Who: Jason King, King Copiers
 Tel: 0210134508
 Email:
 Cell: 0210134508
 Bus: 0210134508

Email - Email updated price list.
 When: 29 Oct 2019, 16:00-17:00
 Who: Jemma Jones, Liberty Jones
 Tel: 0120230340
 Email:
 Cell: 0120230340
 Bus: 0120230340

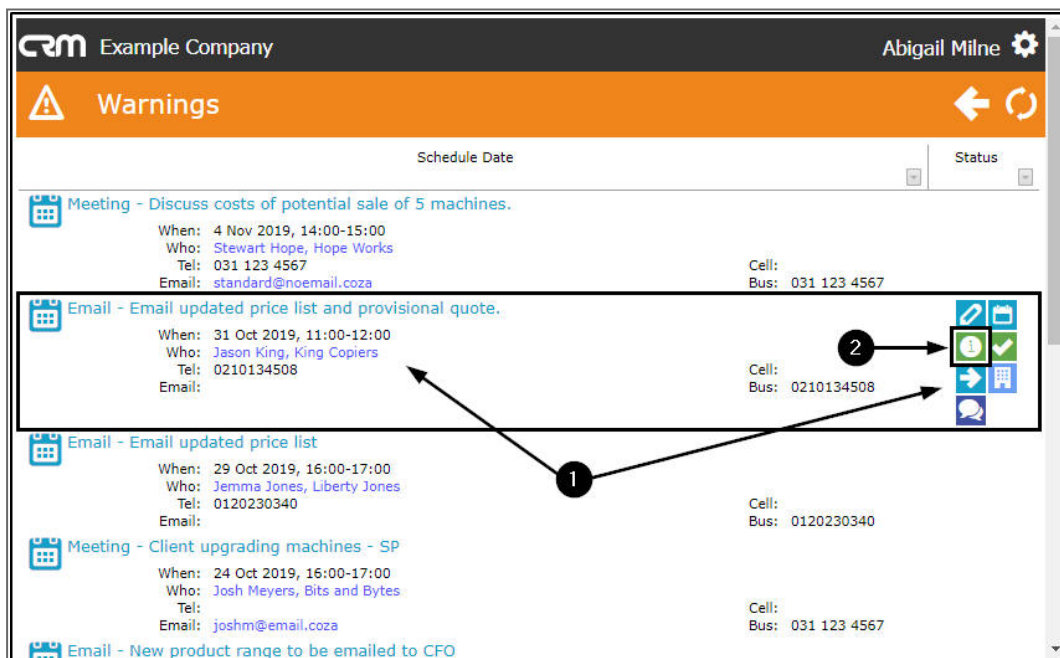
Meeting - Client upgrading machines - SP
 When: 24 Oct 2019, 16:00-17:00
 Who: Josh Meyers, Bits and Bytes
 Tel:
 Email: ioshm@email.co.za
 Cell: 031 123 4567
 Bus: 031 123 4567

1. The **Save Activity** page will open.
2. Reset the **Activity Schedule Date** and **Reminder** details, as required.
 - For more information regarding this page refer to **Scheduling**.
3. Click on **Save** to keep any changes made or
4. Click on **Back** to return to the **Warnings** listing page.

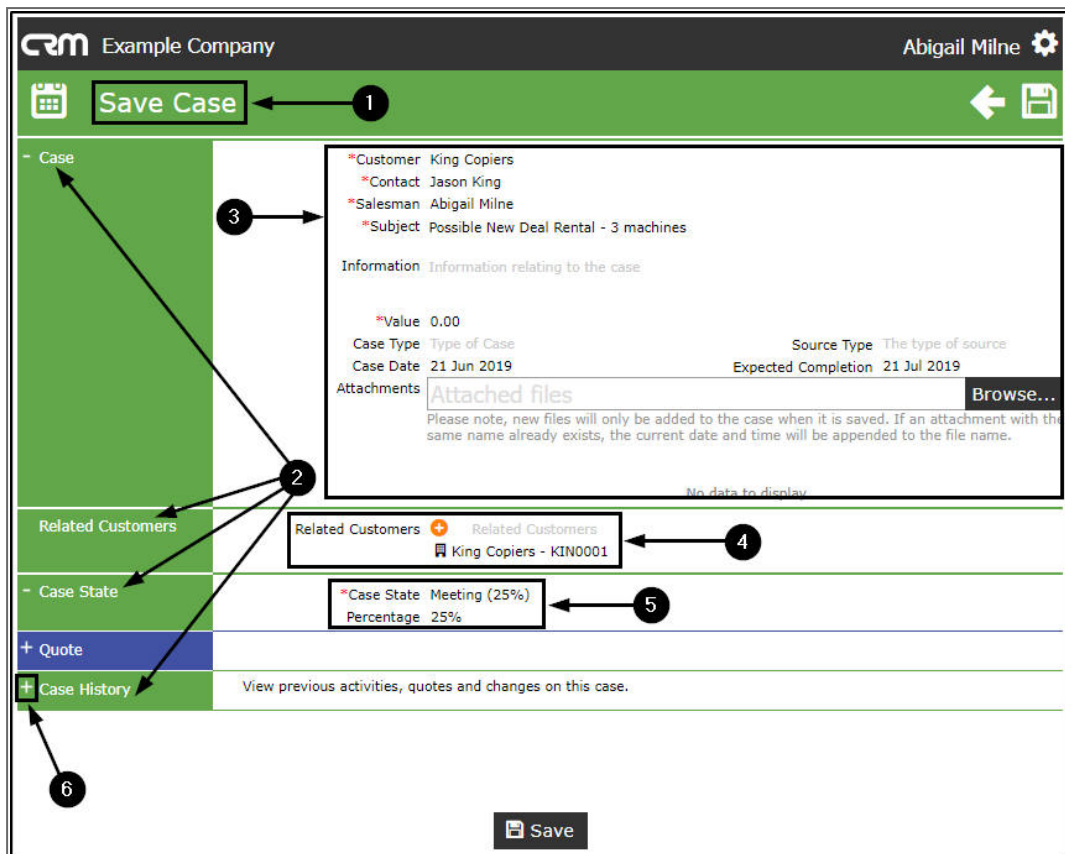


VIEW CASE INFO AND HISTORY

- In the Warnings page, hover over an activity, to reveal the **Action buttons**.
- Click on the **View Case Info and History** icon

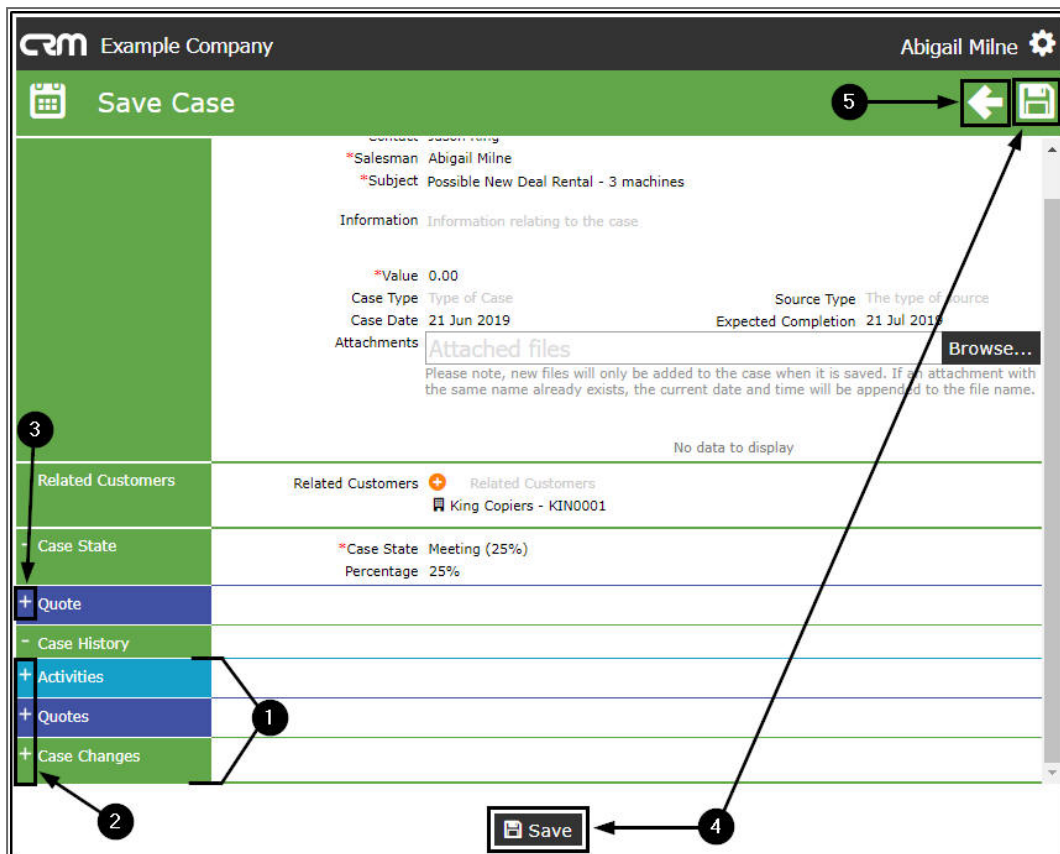


1. The **Save Case** page will open.
2. The following frames will be auto-expanded:
3. **Case**
 - You will note that the **case details** are auto populated. You can edit all these details, except for the Customer, Salesman, Subject and Information fields.
4. **Related Customers**
 - You will note that the Customer Name will be auto populated, you can **add more Related Customers**, if required.
5. **Case State**
 - The Case State and Percentage will be auto populated. You can **edit the Case State**, if required (which will update the Percentage).
6. **Case History**
 - Here you can expand the **Case History** frame.



The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main form is titled 'Save Case' (callout 1). It contains several sections: a left sidebar with 'Case' (callout 2), 'Related Customers', 'Case State', '+ Quote', and '+ Case History' (callout 6); a main content area with fields for Customer, Contact, Salesman, Subject, Value, Case Type, Case Date, Source Type, Expected Completion, and Attachments (callout 3); and a bottom section with 'Related Customers' (callout 4) and 'Case State' (callout 5). A 'Save' button is at the bottom right.

1. The 3 Case History sub-frames can now be viewed.
2. Expand these sub-sections to:
 - i. view an historical list of **Activities** and if an Activity is open it can be actioned using the **Action buttons**,
 - ii. view and edit linked **Quotes** and
 - iii. view any **Case Changes**.
3. In this page, you can create a **new Quote** linked to this Case. Refer to **Add a new Quote linked to this Case** for more information.
4. Click on **Save** to keep any changes made or
5. Click on **Back** to return to the **Warnings** listing page.



CLOSE THIS CASE

- In the Warnings page, hover over an activity, to reveal the **Action buttons**.
- Click on the **Close this Case** icon.

CRM Example Company Abigail Milne

Warnings

Schedule Date: Status:

- Phone call - Titan Group - Follow up after office automation expo**
 When: 28 Aug 2020, 12:00-13:30
 Who: Jackie Sutherland, Titan Group
 Tel: 031 852 9632
 Email: marc.repsold@co3.co.za
 Cell: 083 456 7896
 Bus: 031 852 9632
- For Quotation - Client wanting machine upgrade**
 When: 25 Aug 2020, 10:00-11:00
 Who: Jackie Sutherland, Titan Group
 Tel: 031 852 9632
 Email: marc.repsold@co3.co.za
 Where: PO Box 1478, South Riding, , ,
 Case: Email brochures with price specials
 Comments: Need to be competitive with third party prices
 Completion Notes: 2
- For Quotation - 3 SP18 copiers to be replaced**
 When: 24 Aug 2020, 11:00-12:00
 Who: Jackie Samuels, Hope Works (Pty) Ltd
 Tel: 031 123 4567
 Email:
 Where: Plot 91 Leaf Road, Leaf Hills , Pink Town, Durban South, South Africa
 Cases: Copier Upgrade
 Comments:
 Completion Notes: 1
- Meeting - meeting will be arranged**
 When: 14 Aug 2020, 15:00-16:00
 Who: Mir Hadi, Sweets
 Tel: 567845865
 Email: pillaykame1@gmail.com
 Cell:
 Bus: 567845865
- Second meeting - 2nd Meeting to discuss Finance Options 2 with CFO**
 When: 14 Aug 2020, 08:30-09:30
 Who: James Rowe, Titan Group
 Tel: 1122334455
 Email: rowej@com
 Cell: 001100220033
 Bus: 031 852 9632

- The **Save Case** page will open.
- Type in the completion **Notes**. (This is mandatory.)
- The Case **Closure Date** will be auto populated.
- Click on **Close Case**.
 - **Note:** This will close the Case and any related Activities, this action cannot be undone.

CRM Example Company Abigail Milne

Save Case 1

+ Case Subject Email brochures with price specials

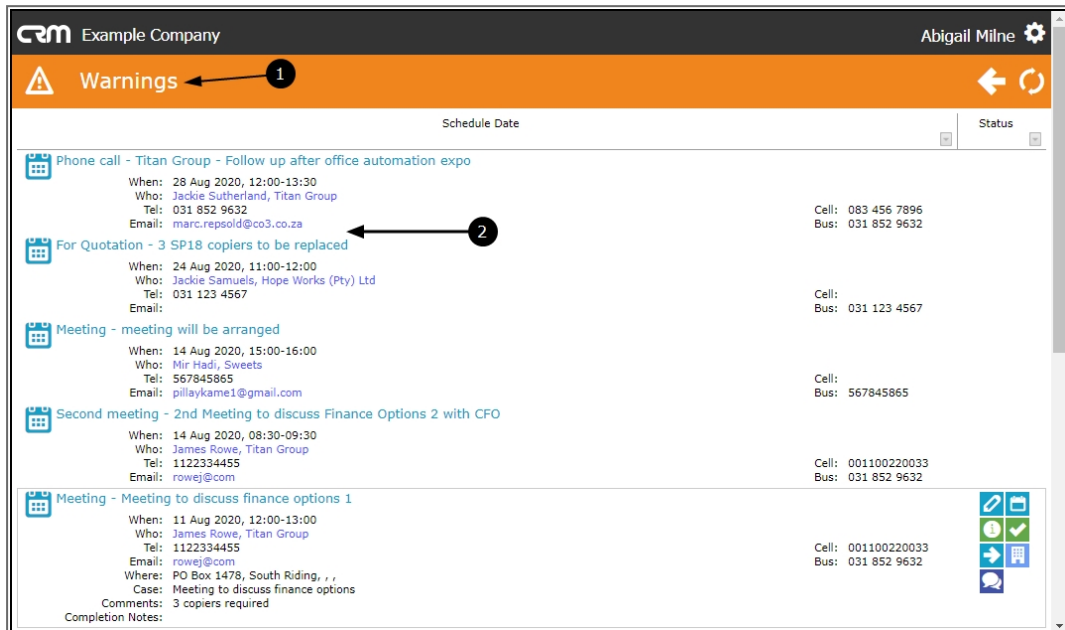
- Case State *Case State Interested (20%)
Percentage 20% 2

- Case Closure *Notes Case on hold until client budget has been confirmed 3

Closure Date 4 Jan 2021

4

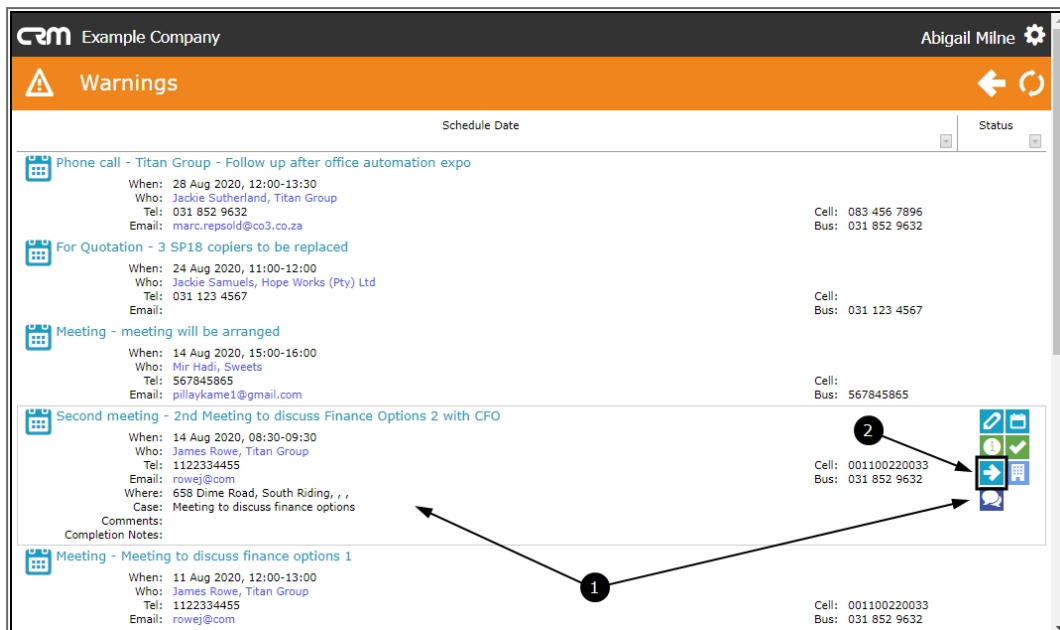
1. You will return to the **Warnings** page.
2. The Warning (Case) that you selected to close, will be removed from the list.



NEXT ACTION

This option will **complete** the current activity and create a **new** activity.

- In the **Warnings** page, hover over an activity, to reveal the **Action buttons**.
- Click on the **Next Action** icon.

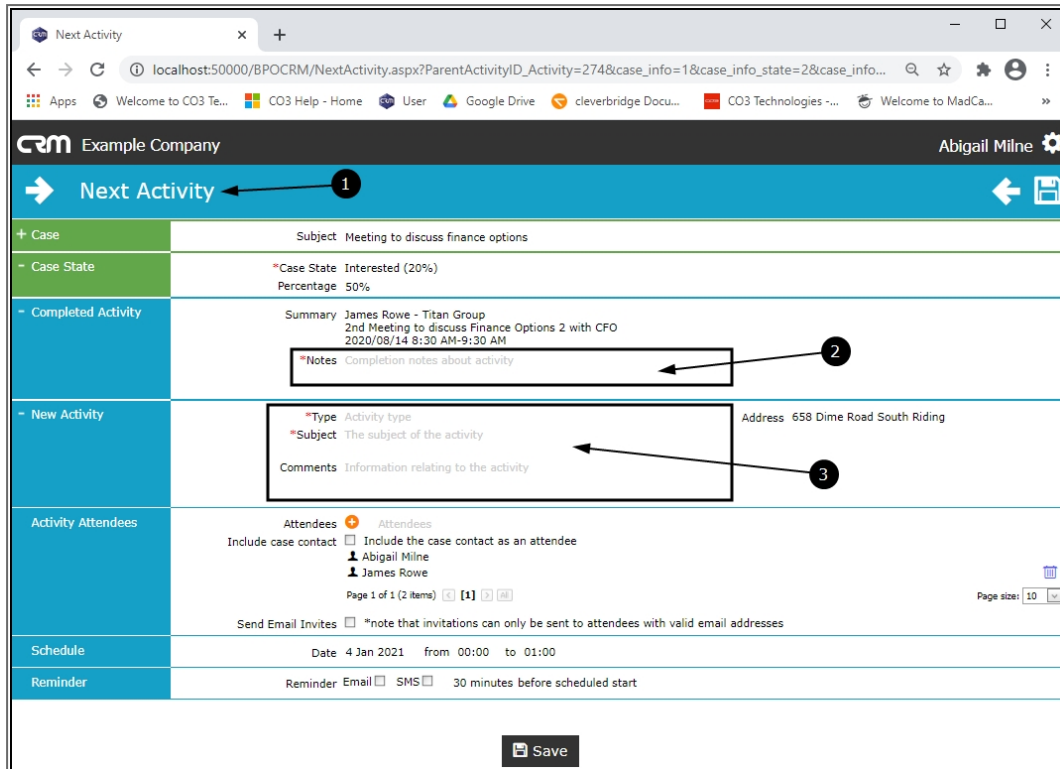


The screenshot shows the 'Warnings' section of a CRM interface for 'Example Company'. The page lists several activities with their details and contact information. Two annotations are present:

- Annotation 1:** Points to the 'Completion Notes' field of the 'Second meeting' activity.
- Annotation 2:** Points to the 'Status' dropdown menu of the 'Second meeting' activity.

Activity	When	Who	Tel	Email	Cell	Bus
Phone call - Titan Group - Follow up after office automation expo	28 Aug 2020, 12:00-13:30	Jackie Sutherland, Titan Group	031 852 9632	marc.repsold@co3.co.za	083 456 7896	031 852 9632
For Quotation - 3 SP18 copiers to be replaced	24 Aug 2020, 11:00-12:00	Jackie Samuels, Hope Works (Pty) Ltd	031 123 4567		031 123 4567	
Meeting - meeting will be arranged	14 Aug 2020, 15:00-16:00	Mir Hadi, Sweets	567845865	pillaykame1@gmail.com	567845865	
Second meeting - 2nd Meeting to discuss Finance Options 2 with CFO	14 Aug 2020, 08:30-09:30	James Rowe, Titan Group	1122334455	rowej@com	001100220033	031 852 9632
Meeting - Meeting to discuss finance options 1	11 Aug 2020, 12:00-13:00	James Rowe, Titan Group	1122334455	rowej@com	001100220033	031 852 9632

1. The **Next Activity** page will open.
2. Ensure that you update the **Completed Activity** *Notes, this is mandatory.
3. Fill in the information for the **New Activity**.



Next Activity

Case Subject Meeting to discuss finance options

Case State *Case State Interested (20%)
Percentage 50%

Completed Activity Summary James Rowe - Titan Group
2nd Meeting to discuss Finance Options 2 with CFO
2020/08/14 8:30 AM-9:30 AM
*Notes Completion notes about activity

New Activity *Type Activity type
*Subject The subject of the activity
Comments Information relating to the activity
Address 658 Dime Road South Riding

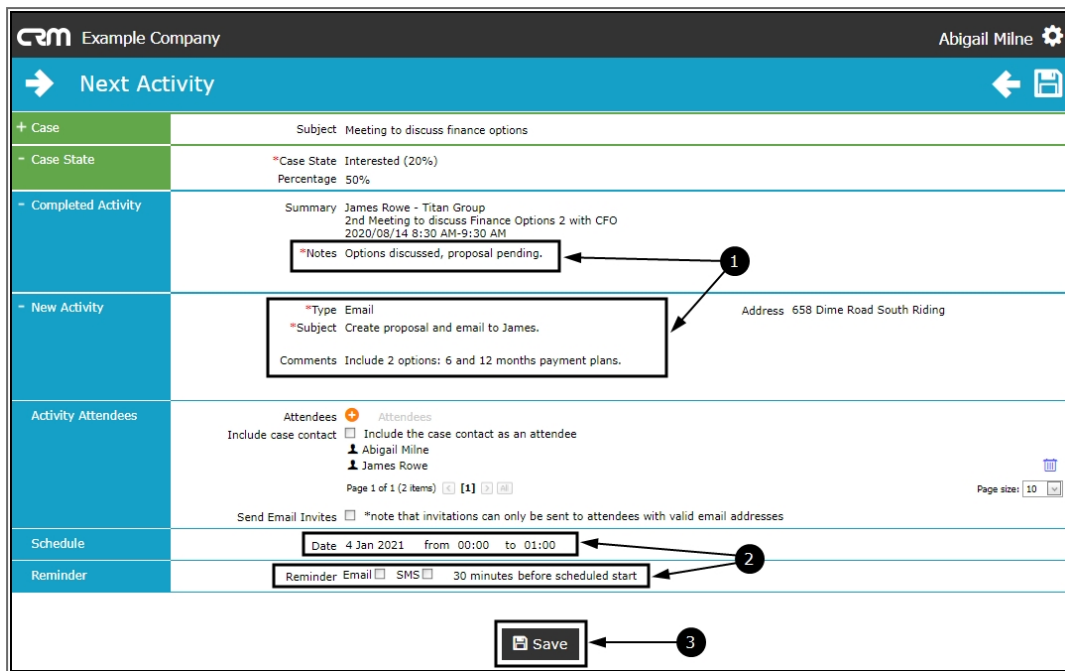
Activity Attendees Attendees
Include case contact ☐ Include the case contact as an attendee
Abigail Milne
James Rowe
Page 1 of 1 (2 items) [1] [2] [3]
Send Email Invites ☐ *note that invitations can only be sent to attendees with valid email addresses

Schedule Date 4 Jan 2021 from 00:00 to 01:00

Reminder Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

Save

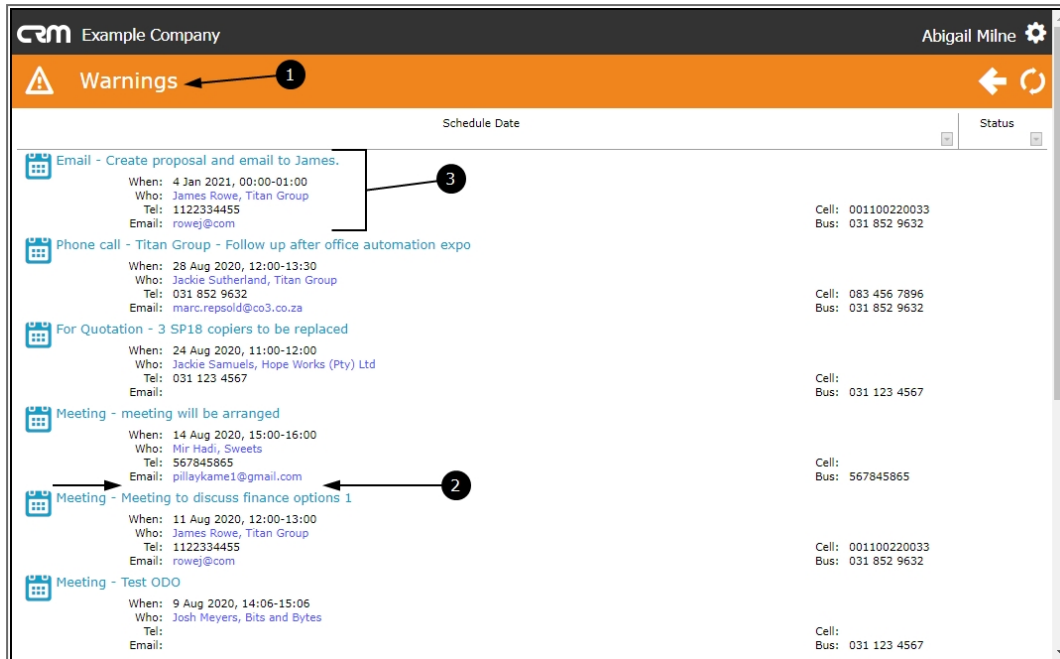
1. When you have added the **Notes** and **New Activity** information,
2. You can **Schedule** the date of the New Activity and set a **Reminder** at this point, if you wish.
 - **Note:** If you do not set the date then it will auto populate with the current date, and the time will be set to a 1 hour time slot ahead of the current time.
3. When you have entered the required information, click on **Save**.



The screenshot shows the 'Next Activity' form in a CRM system. The form is divided into several sections: Case, Case State, Completed Activity, New Activity, Activity Attendees, Schedule, and Reminder. Annotations 1, 2, and 3 point to specific elements:

- Annotation 1:** Points to the 'Notes' field in the 'Completed Activity' section, which contains the text: 'Options discussed, proposal pending.'
- Annotation 2:** Points to the 'Date' field in the 'Schedule' section, which is set to '4 Jan 2021'.
- Annotation 3:** Points to the 'Save' button at the bottom of the form.

1. You will return to the **Warnings** page.
2. The originally selected Warning will be removed from the list.
3. If you did not set the date and time of the **New Activity**, it will present in the Warnings list, as in this image.
 - If you set an alternative date, ahead of the current date, it will not appear until the Activity moves into the Warning date/time parameters.

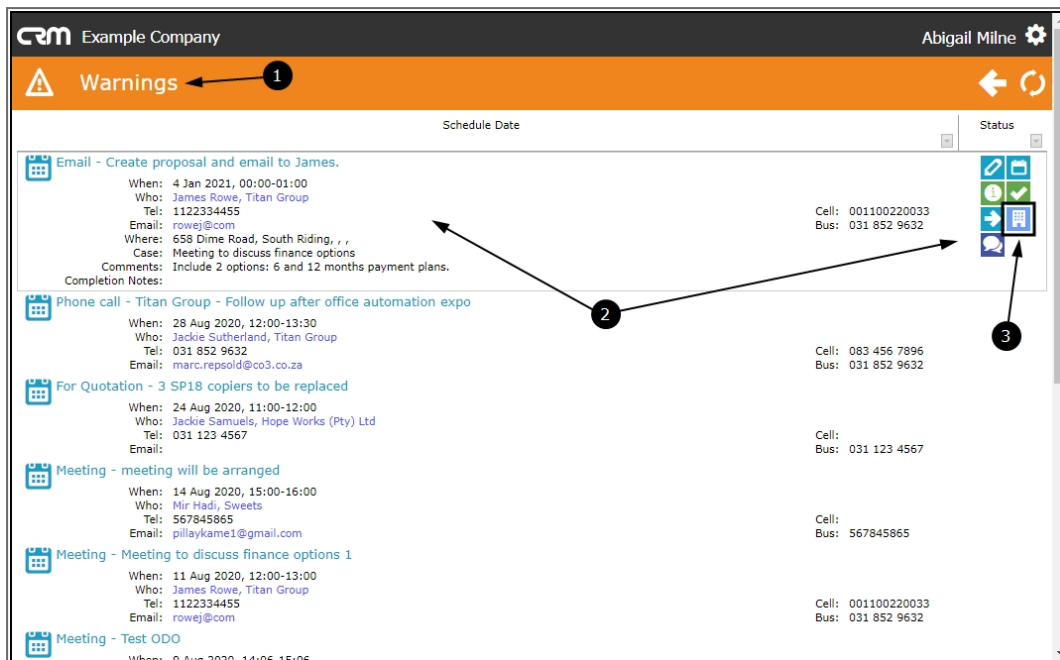


The screenshot shows the 'Warnings' page in a CRM system for 'Example Company'. The page header includes the company name and a user profile for 'Abigail Milne'. The main content area lists several activities, each with a calendar icon, a title, a date/time, and contact information. Callout 1 points to the 'Warnings' header, callout 2 points to the 'Meeting - Meeting to discuss finance options 1' activity, and callout 3 points to the 'Email - Create proposal and email to James.' activity.

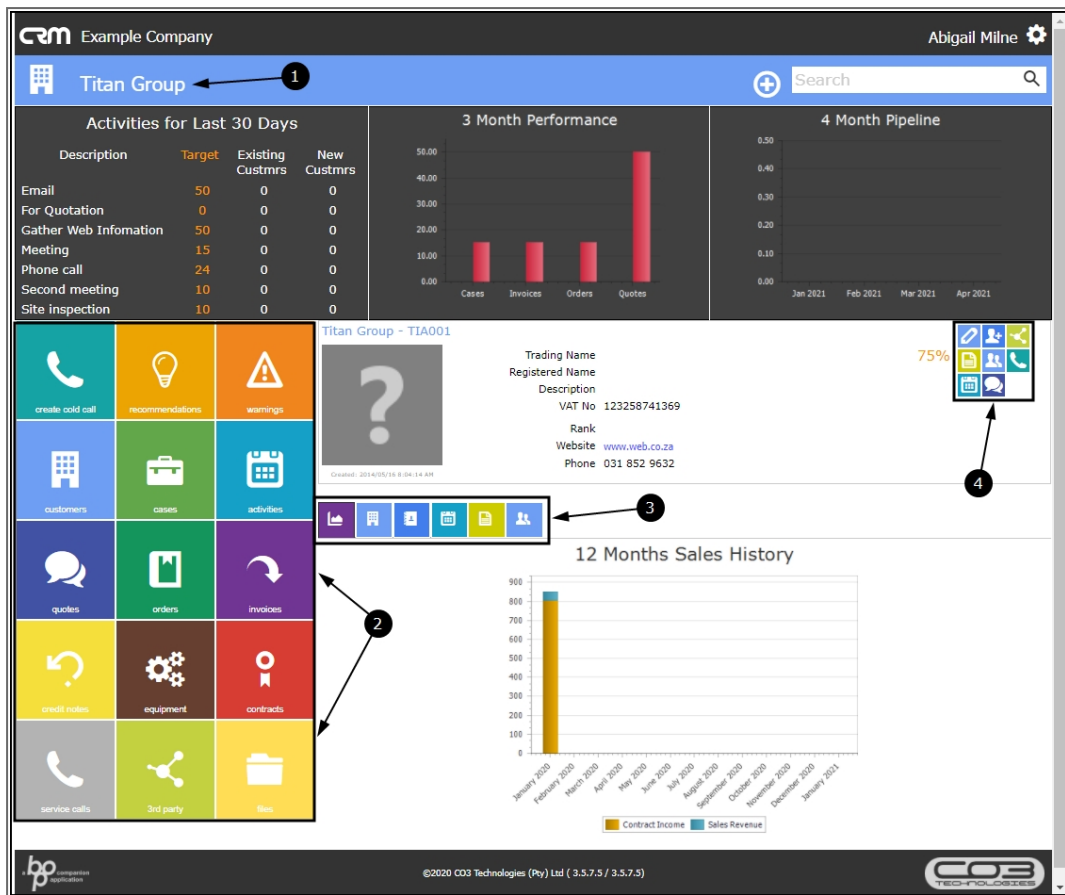
Activity	When	Who	Tel	Email	Cell	Bus
Email - Create proposal and email to James.	4 Jan 2021, 00:00-01:00	James Rowe, Titan Group	1122334455	rowej@com	001100220033	031 852 9632
Phone call - Titan Group - Follow up after office automation expo	28 Aug 2020, 12:00-13:30	Jackie Sutherland, Titan Group	031 852 9632	marc.repold@co3.co.za	083 456 7896	031 852 9632
For Quotation - 3 SP18 copiers to be replaced	24 Aug 2020, 11:00-12:00	Jackie Samuels, Hope Works (Pty) Ltd	031 123 4567			
Meeting - meeting will be arranged	14 Aug 2020, 15:00-16:00	Mir Hadi, Sweets	567845865	pillaykame1@gmail.com		
Meeting - Meeting to discuss finance options 1	11 Aug 2020, 12:00-13:00	James Rowe, Titan Group	1122334455	rowej@com	001100220033	031 852 9632
Meeting - Test ODO	9 Aug 2020, 14:06-15:06	Josh Meyers, Bits and Bytes				

VIEW CUSTOMER

- In the **Warnings** page, hover over an activity, to reveal the **Action buttons**.
- Click on the **View Customer** icon.



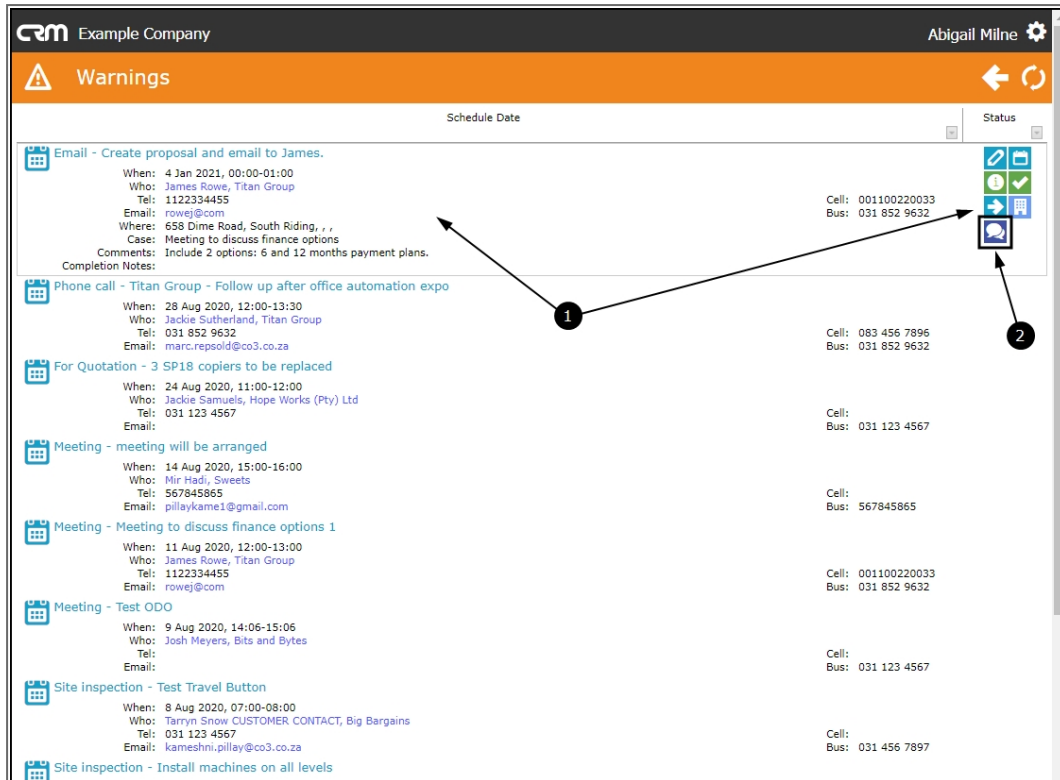
1. The **Customer** page will open.
 2. From here, you can access the Customer **Dashboard Tiles**,
 3. the Customer **Information Tiles** and the
 4. Customer **Action buttons**.
- Use your browser's **back** button to return to the Warning List / Close the 'View Warnings' form.



NEW QUOTE

You can create a **new quote** from the **Warnings** page.

- In the **Warnings** page, hover over an activity, to reveal the **Action buttons**.
- Click on the **Quote** icon.



The screenshot shows the 'Warnings' section of a CRM interface for 'Example Company'. The page lists several activities, each with details like 'When', 'Who', 'Tel', 'Email', 'Where', 'Case', 'Comments', and 'Completion Notes'. Callout 1 points to the 'Email' field of the first activity, and callout 2 points to the 'Status' field of the same activity.

Activity	When	Who	Tel	Email	Where	Case	Comments	Completion Notes	Cell	Bus
Email - Create proposal and email to James.	4 Jan 2021, 00:00-01:00	James Rowe, Titan Group	1122334455	rowej@com	658 Dime Road, South Riding, , ,	Meeting to discuss finance options	Include 2 options: 6 and 12 months payment plans.		001100220033	031 852 9632
Phone call - Titan Group - Follow up after office automation expo	28 Aug 2020, 12:00-13:30	Jackie Sutherland, Titan Group	031 852 9632	marc.repsold@co3.co.za					083 456 7896	031 852 9632
For Quotation - 3 SP18 copiers to be replaced	24 Aug 2020, 11:00-12:00	Jackie Samuels, Hope Works (Pty) Ltd	031 123 4567							
Meeting - meeting will be arranged	14 Aug 2020, 15:00-16:00	Mir Hadi, Sweets	567845865	pillaykame1@gmail.com						
Meeting - Meeting to discuss finance options 1	11 Aug 2020, 12:00-13:00	James Rowe, Titan Group	1122334455	rowej@com					001100220033	031 852 9632
Meeting - Test ODO	9 Aug 2020, 14:06-15:06	Josh Meyers, Bits and Bytes								
Site inspection - Test Travel Button	8 Aug 2020, 07:00-08:00	Tarryn Snow CUSTOMER CONTACT, Big Bargains	031 123 4567	kameshini.pillay@co3.co.za						
Site inspection - Install machines on all levels										

- The **Save Quote** page will open.
- Add the quote details as required, by referring to [Add a New Quote](#).
 - **Note:** A quote will only be created if you add quote **line items**.

CRM Example Company

Abigail Milne

Save Quote

Case

Subject Meeting to discuss finance options

Quote

*A quote will only be created if you add quote line items.

*Customer Titan Group

*Quote Contact Select...

Quote Reference REF00000

Reference Reference

Comments Information relating to the quote

Date 5 Jan 2021

*Site Durban

*Print Layout SALESQUOTE_TIT001

Quote Financials

*Currency South African Rand

Tax Rate 15.00

*Exchange Rate 1.0000

Quote Terms Full Payment COD

*Commercial Discount Commercial

Quote Items

Add item

Type to find items...

Drag a column here...

No data to display

Save

1. When you have added the required quote details,
2. click on **Save**.

CRM Example Company

Abigail Milne

Save Quote

Case

Subject Meeting to discuss finance options

Quote

*A quote will only be created if you add quote line items.

*Customer Titan Group

*Quote Contact James Rowe

Quote Reference REF00000

Reference Reference

Comments Proposal accepted in principle, email quote with 2 financial options: 6 and 12 months.

Date 5 Jan 2021

*Site Durban

*Print Layout SALESQUOTE_TIT001

Quote Financials

*Currency South African Rand

Tax Rate 15.00

*Exchange Rate 1.0000

Quote Terms Full Payment COD

*Commercial Discount Commercial

Quote Items

Add item

Type to find items...

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour MF Copier	3	9079.41	0.00		0.00		0.00	
INVN	2020-856	Drum	3	1177.62	0.00		0.00		0.00	
				10257.03	0.00		0.00		0.00	

1

2

Save

1. A **Quote saved successfully** message box will pop up.

You now have the option to:

2. **Delete**
3. **View**
4. **Save and**

5. Copy this new quote.
6. To return to the Warnings page, first select the **Back to Customer page** icon. In the opened Customer Home page, select the **Warnings** tile.

Quote saved successfully. Abigail Mkhize

Save Quote

←
🏠
💾

+ Case

Subject: Meeting to discuss finance options

+ Quote

*A quote will only be created if you add quote line items.

*Customer: Titan Group Date: 5 Jan 2021

*Quote Contact: James Rowe *Site: Durban

Quote Reference: QT0000320 *Print Layout: SALESQUOTE_TIT001

Reference: Reference

Comments: Proposal accepted in principle, email quote with 2 financial options: 6 and 12 months.

+ Quote Financials

*Currency: South African Rand Quote Terms: Full Payment COD

Tax Rate: 15.00000 *Commercial: Discount Commercial

*Exchange Rate: 1.0000

+ Quote Items

Add item + Type to find items...

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour MF Copier	3.00	9079.41	0.00	0.00	0.00	🔗 🗑	0.00	
INVN	2020-856	Drum	3.00	1177.62	0.00	0.00	0.00	🔗 🗑	0.00	
			6.00	10257.03	0.00	0.00	0.00		0.00	

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