

# CRM BASICS

## CASES

A Case is like an opportunity: a reason to engage with a client in order to fulfill a sale requirement or propose a deal. A case gives rise to a quote and subsequent new deal.

A Case can be viewed as an umbrella over all the underlying activities that work towards achieving a contract with that customer.

There is certain criteria required when dealing with Cases:

- A **customer** is required in order to create a Case.
- A Case is required to raise an **Activity**.
- Only one Activity per Case can be open at any one time.

A full list of Cases can be accessed from the CRM Homepage as set out below.

Customer specific Cases can be accessed from the Customer Homepage.

CRM will prompt you to create a new Case, when **raising a new Activity** for a customer.

**Quotes** can be added to a Case from the **My Cases** listing page when using the following **Action** buttons:

- Viewing Case Info and History
- View / Edit this Case
- New Activity

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

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## VIEW ENTIRE CASE LIST FROM HOMEPAGE

1. In the *Home page*,
2. Click on the *Cases* tile.



The screenshot shows the CRM Example Company dashboard. At the top, there's a header with the company name, user name 'Abigail Milne', and a search bar. Below the header, there's a 'Dashboard' tab with a red circle and arrow labeled '1' pointing to it. The dashboard contains several widgets: 'Activities for Last 30 Days' (a table), '1 Month Performance' (a bar chart), '4 Month Pipeline' (a bar chart), and a grid of tiles. The 'cases' tile is highlighted with a red circle and arrow labeled '2'. The 'cases' tile shows a count of 9. The 'activities' tile shows a count of 9. The 'customers' tile shows a count of 74. The 'quotes' tile shows a count of 5. The 'equipment' tile shows a count of 147. The '3rd party' tile shows a count of 4. The 'cases' tile is the one to click to view the entire case list.

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	5
Email	30	0	2
Meeting	40	0	1
On Site Inspection	50	0	1
Site inspection	2	0	0

1 Month Performance

Category	Value
Cases	15 000.00
Invoices	9 000.00
Orders	6 000.00
Quotes	3 000.00

4 Month Pipeline

Month	Value
Jul 2019	6 000.00
Aug 2019	1 000.00
Sep 2019	2 000.00
Oct 2019	0.00

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	5
Email	30	0	2
Meeting	40	0	1
On Site Inspection	50	0	1
Site inspection	2	0	0

Grid of Tiles:

- create cold call (30 Sep 2016, 0)
- recommendations (0)
- warnings (5)
- customers (74)
- cases (9)
- activities (9)
- quotes (5)
- equipment (147)
- 3rd party (4)

Phone call - King Enterprises: Confirm meeting times with new Purchasing Manager

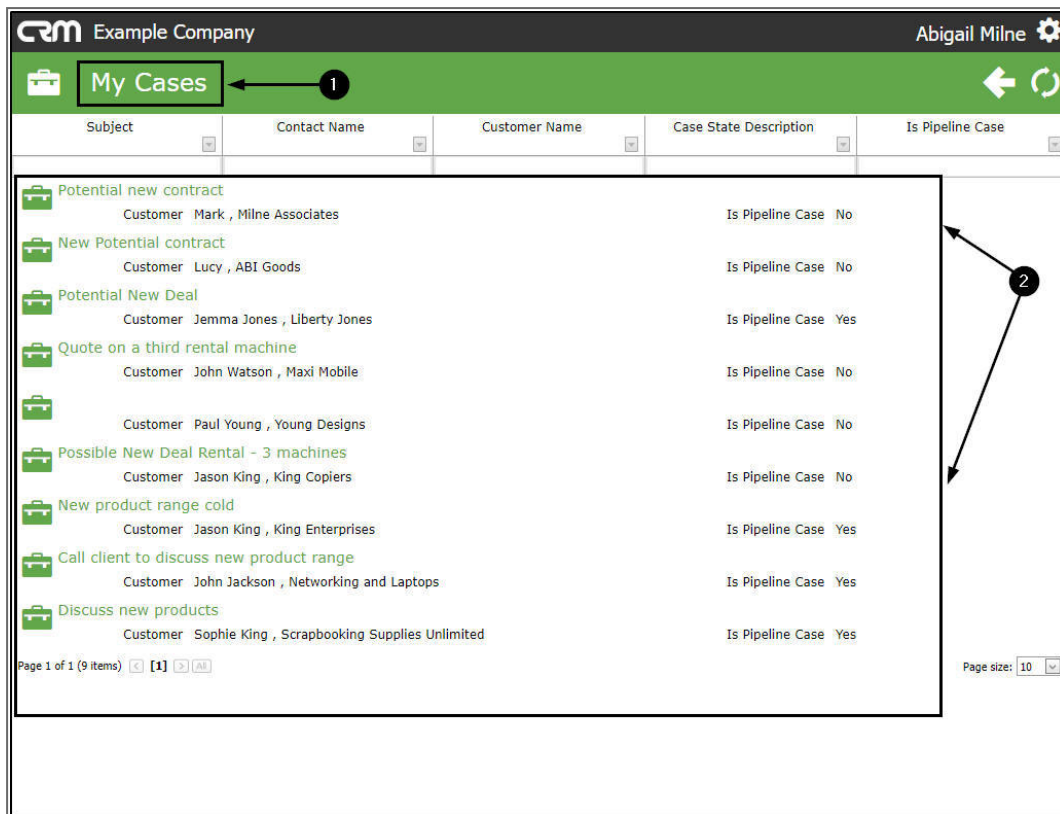
When: 23 Jul 2019, 17:00-18:00  
 Who: Jason King, King Enterprises  
 Tel: [redacted]  
 Email: [redacted]  
 Cell: [redacted]  
 Bus: 0123456789

Page 1 of 1 (1 items) [1] [2] [3] [4] [5] [6] [7] [8] [9] [10] [All]

Page size: 10

## MY CASES PAGE

- The *My Cases* page will be displayed.
- Here you can view the entire case list for all customers.



## CASE ACTION BUTTONS

1. Hover over any Case to reveal the **Action** buttons:

- View / Edit this Case
- View Case info and history
- New Activity
- Close this case
- Won this Case
- Lost this Case

## VIEW CASE SUMMARY

2. **Single click** on any Case to access a **quick view summary** of the Case information.

**CRM Example Company** Abigail Milne

## My Cases

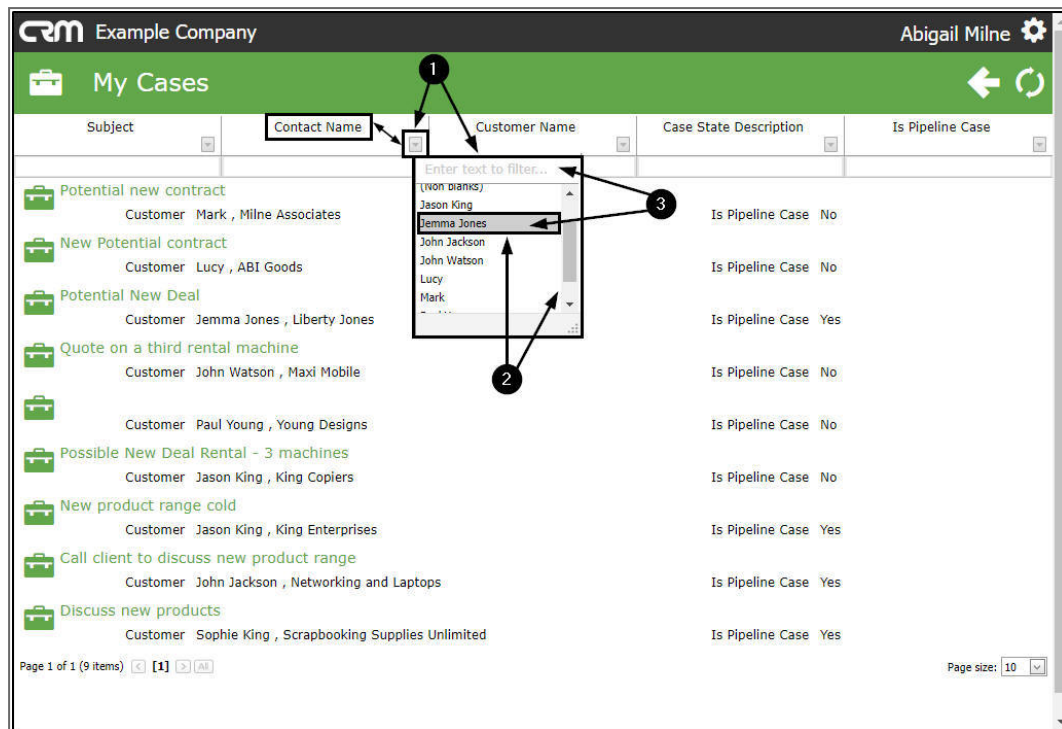
Subject	Contact Name	Customer Name	Case State Description	Is Pipeline Case
Potential new contract				
Customer Mark , Milne Associates			Is Pipeline Case No	
New Potential contract				
Customer Lucy , ABI Goods			Is Pipeline Case No	
Potential New Deal				
Customer Gemma Jones , Liberty Jones			Is Pipeline Case Yes	
Quote on a third rental machine				
Customer John Watson , Maxi Mobile			Is Pipeline Case No	
Customer Paul Young , Young Designs			Is Pipeline Case No	
Possible New Deal Rental - 3 machines				
Customer Jason King , King Copiers			Is Pipeline Case No	
New product range cold				
Customer Jason King , King Enterprises			Is Pipeline Case Yes	
Case Review client requirements			Case State Interested	
Value 7500.00			Percentage 20.00 %	
Relative Value 1500.00			Expected Completion 26 Jul 2019	
Case Date 19 Jul 2019				
Call client to discuss new product range				
Customer John Jackson , Networking and Laptops			Is Pipeline Case Yes	
Discuss new products				
Customer Sophie King , Scrapbooking Supplies Unlimited			Is Pipeline Case Yes	

Page size: 10

## SEARCH FOR A CASE

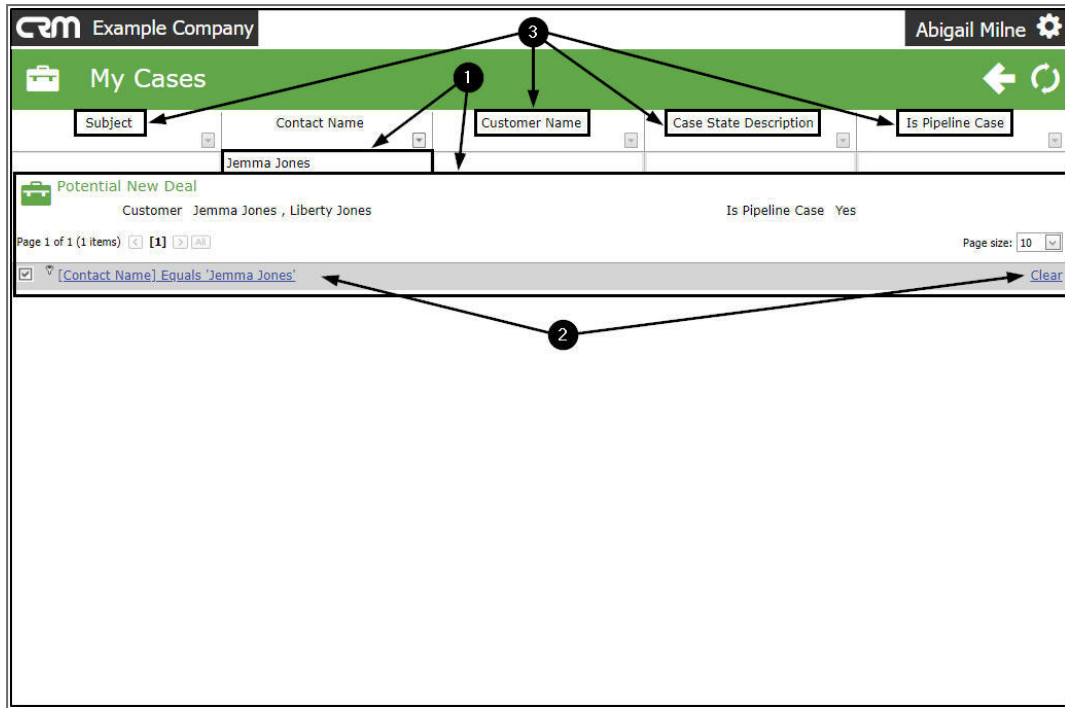
You can search for a specific Case using the **Filter Row** and **Filter List** Functionality

1. You can click on a **filter arrow** to display the applicable drop-down menu.
  - In this example, the selected filter arrow is in the **Contact Name** column, therefore the menu displayed will list all the contact names linked to your cases.
2. Either **scroll** through the list to find the relevant contact name from the menu.
3. Or use the **filter box** to type in the relevant contact name, the system will search for the name as you type. Click on the name.



1. The **My Cases** page will now list only the cases linked to this contact name.
2. The **filter row** will display the filter sequence. You can click on **Clear** to remove any filter(s). The page will then display the full My Cases list again.
3. You can search for specific cases in this way using any of the columns:
  - **Subject**
  - **Contact Name**
  - **Customer Name**
  - **Case State Description**
  - **Is Pipeline Case**

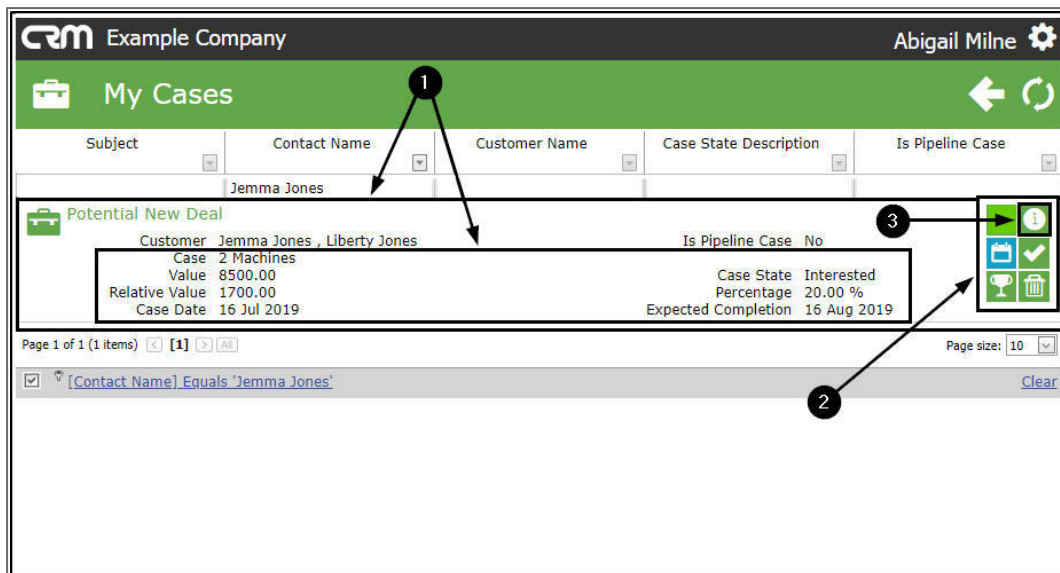
and a combination of columns if required e.g. **Customer Name** and **Case Description**.



## CASES – ACTION BUTTONS

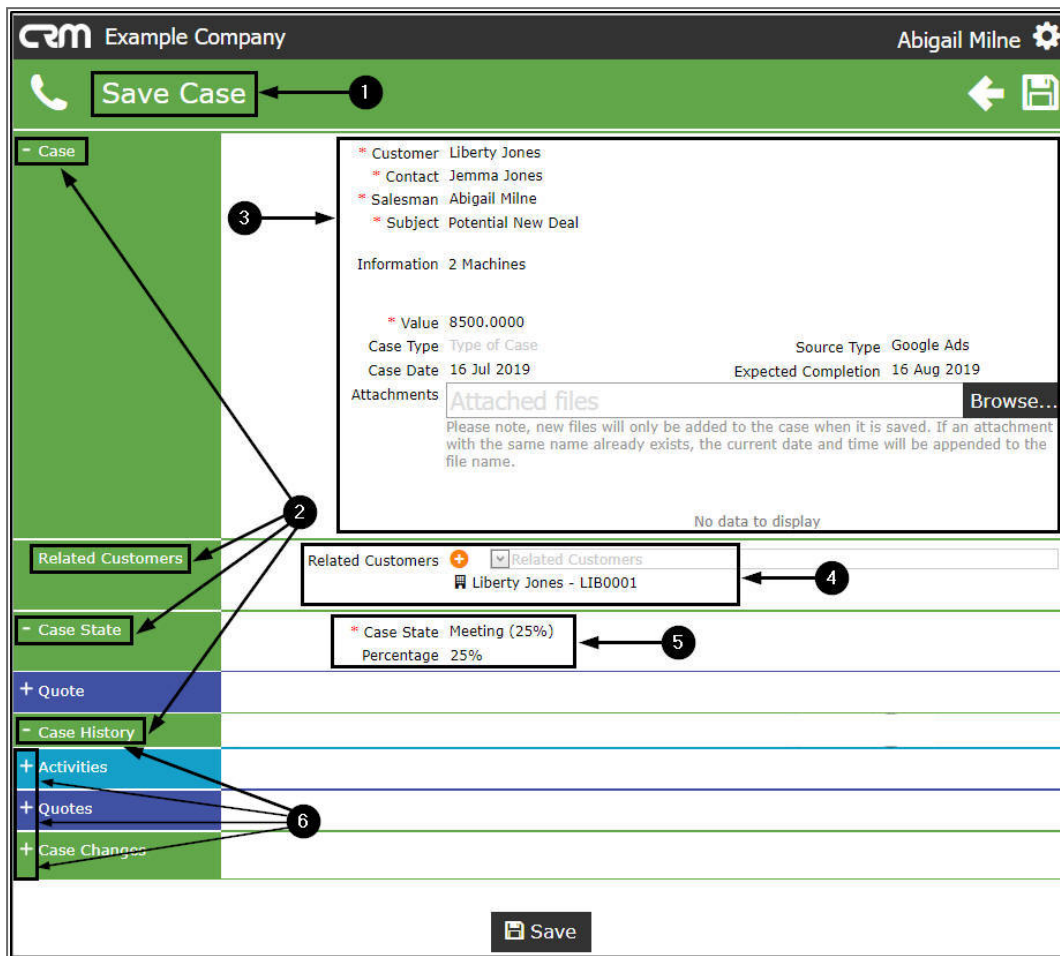
### CASE INFORMATION AND HISTORY

1. **Single click** anywhere on this Case to display the **summary** of the Case information and to reveal the
2. **Action Item** buttons.
3. 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 three Case History sub-sections to:
    - view an historical list of (i) **Activities** and if an Activity is open it can be actioned using the **Action buttons**,

- view and edit linked (ii) **Quotes** and
- view any (iii) **Case Changes**.



The screenshot shows the 'Save Case' form in a CRM system. The form is titled 'Save Case' and has a 'Back' button and a 'Save' button. The form is divided into several sections:


- Case Information:** Includes fields for Customer (Liberty Jones), Contact (Jemma Jones), Salesman (Abigail Milne), and Subject (Potential New Deal). It also shows 'Information: 2 Machines', 'Value: 8500.0000', 'Case Type: Type of Case', 'Case Date: 16 Jul 2019', 'Source Type: Google Ads', and 'Expected Completion: 16 Aug 2019'.
- Attachments:** A section for adding files, with a 'Browse...' button and a note: '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.'
- Related Customers:** A section showing a list of related customers, with a dropdown menu and a search bar. A specific customer, 'Liberty Jones - LIB0001', is highlighted.
- Case State:** A section showing the current state of the case, with a dropdown menu and a percentage field (25%).
- Case History:** A section showing a list of case history items, including 'Quote', 'Case History', 'Activities', 'Quotes', and 'Case Changes'.


Numbered annotations (1-6) point to specific elements in the form:


1. 'Save Case' button
2. 'Case' section header
3. 'Case Information' section
4. 'Related Customers' section
5. 'Case State' section
6. 'Case History' section




1. In this page, you can create a **new Quote** linked to to this Case. Refer to [Add a new Quote linked to this Case](#) for more information.
2. Click on the **Back** button to return to the **My Cases** page.




Example Company

Abigail Milne



Save Case

2




- Case

\*Customer Liberty Jones  
\*Contact Jemma Jones  
\*Salesman Abigail Milne  
\*Subject Potential New Deal

Information 2 Machines

\*Value 8500.00

Case Type Type of Case

Case Date 16 Jul 2019

Source Type Google Ads

Expected Completion 16 Aug 2019

Attachments

Attached files
Browse...

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.

No data to display

Related Customers

Related Customers
+
Related Customers:

- ABI Goods - ABI0001
- Liberty Jones - LIB0001

- Case State

\*Case State Meeting (25%)  
Percentage 25%

+ Quote

- Case History

+ Activities

+ Quotes

+ Case Changes

Save

## VIEW / EDIT THIS CASE

1. In the **My Cases** page, hover anywhere over a Case to display the **Action Items** buttons.
2. Click on the **View/Edit this Case** icon.

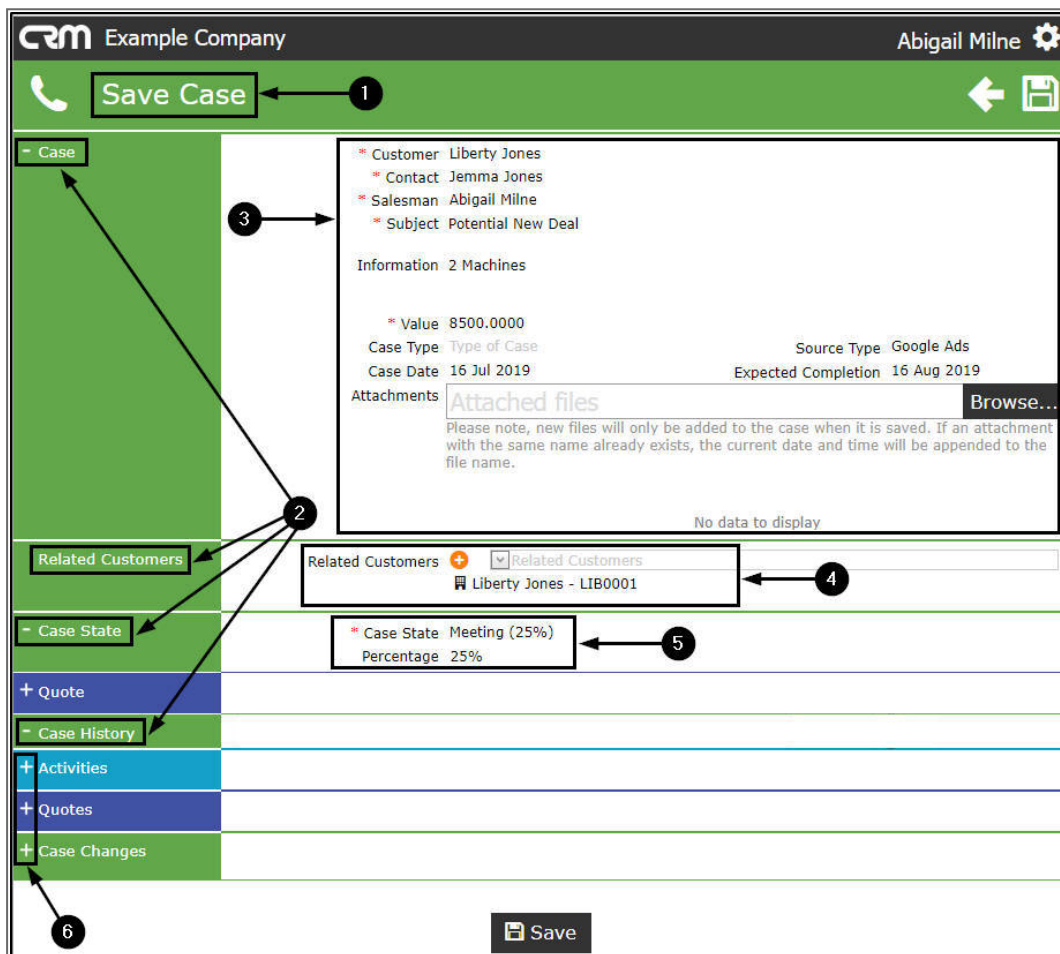
CRM Example Company				Abigail Milne
My Cases				
Subject	Contact Name	Customer Name	Case State Description	Is Pipeline Case
Potential new contract	Customer Mark , Milne Associates			No
Potential New Deal	Customer Gemma Jones , Liberty Jones			No
	Customer Paul Young , Young Designs			No
Possible New Deal Rental - 3 machines	Customer Jason King , King Copiers			No
Email new brochures	Customer Duncan McCreddie , Hope Works			No
Discuss new product range	Customer Jim Saunders , ABC SHoe Co			Yes
New product range	Customer John West , Hope Works			Yes
Present 2019 product range	Customer Lucy , ABI Goods			Yes
Email updated copier price list	Customer Duncan McCreddie , Hope Works			No
Mr Lovely from Lovely Test Customer, which is a Platinum customer, has a rank call due today, 15 Oct 2019.				
	Customer Mr Lovely , Lovely Test Customer			No

Page 1 of 2 (12 items) [1] 2 > All Page size: 10

1. The **Save Case** page will be displayed.
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 three **Case History** sub-sections to:
  - view an historical list of (i) **Activities** and if an Activity is open it can be actioned using the **Action buttons**,
  - view and edit linked (ii) **Quotes** and
  - view any (iii) **Case Changes**.



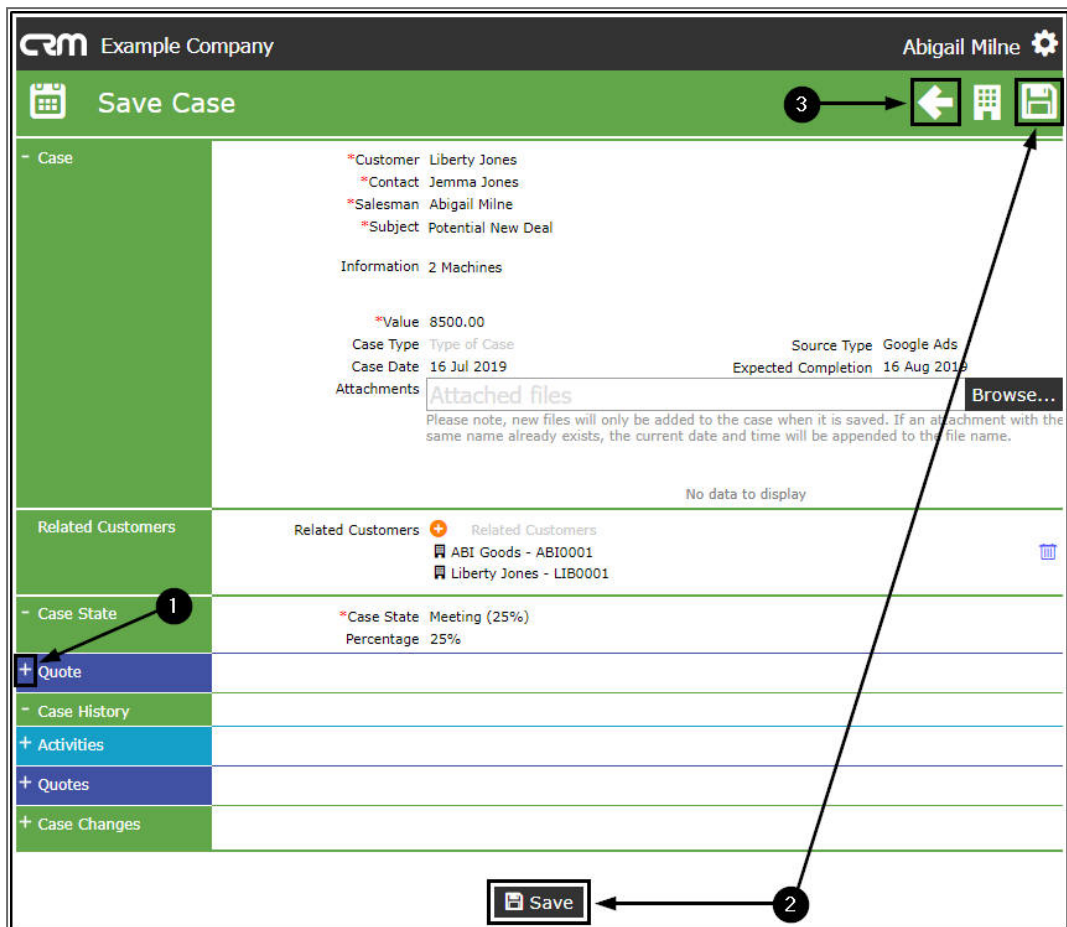
The screenshot shows the CRM interface for 'Example Company' with user 'Abigail Milne'. The form is titled 'Save Case' (callout 1). The left sidebar contains a 'Case' section (callout 2) with sub-sections: 'Case State', '+ Quote', '- Case History', '+ Activities', '+ Quotes', and '+ Case Changes' (callout 6). The main form area contains the following fields:

- \* Customer: Liberty Jones
- \* Contact: Jemma Jones
- \* Salesman: Abigail Milne
- \* Subject: Potential New Deal
- Information: 2 Machines
- \* Value: 8500.0000
- Case Type: Type of Case
- Case Date: 16 Jul 2019
- Source Type: Google Ads
- Expected Completion: 16 Aug 2019
- Attachments: Attached files (with a 'Browse...' button)

Below the main form, there is a 'Related Customers' section (callout 4) showing 'Liberty Jones - LIB0001'. Below that is a 'Case State' section (callout 5) showing 'Meeting (25%)' and 'Percentage 25%'. A 'Save' button is at the bottom right (callout 6).

- In this page, you can link a **Quote** to this Case. Refer to **Add a new Quote linked to this Case** for more information.

2. Click on **Save** to apply any changes or
3. Click on the **Back** button to return to the **My Cases** page.



CRM Example Company Abigail Milne

## Save Case

3

1

2

Case

\*Customer Liberty Jones  
\*Contact Jemma Jones  
\*Salesman Abigail Milne  
\*Subject Potential New Deal

Information 2 Machines

\*Value 8500.00

Case Type Type of Case Source Type Google Ads  
Case Date 16 Jul 2019 Expected Completion 16 Aug 2019

Attachments Attached files Browse...

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.

No data to display

Related Customers

Related Customers + Related Customers

ABI Goods - ABI0001  
Liberty Jones - LIB0001

Case State

\*Case State Meeting (25%)  
Percentage 25%

+ Quote

Case History

+ Activities

+ Quotes

+ Case Changes

Save

## NEW ACTIVITY

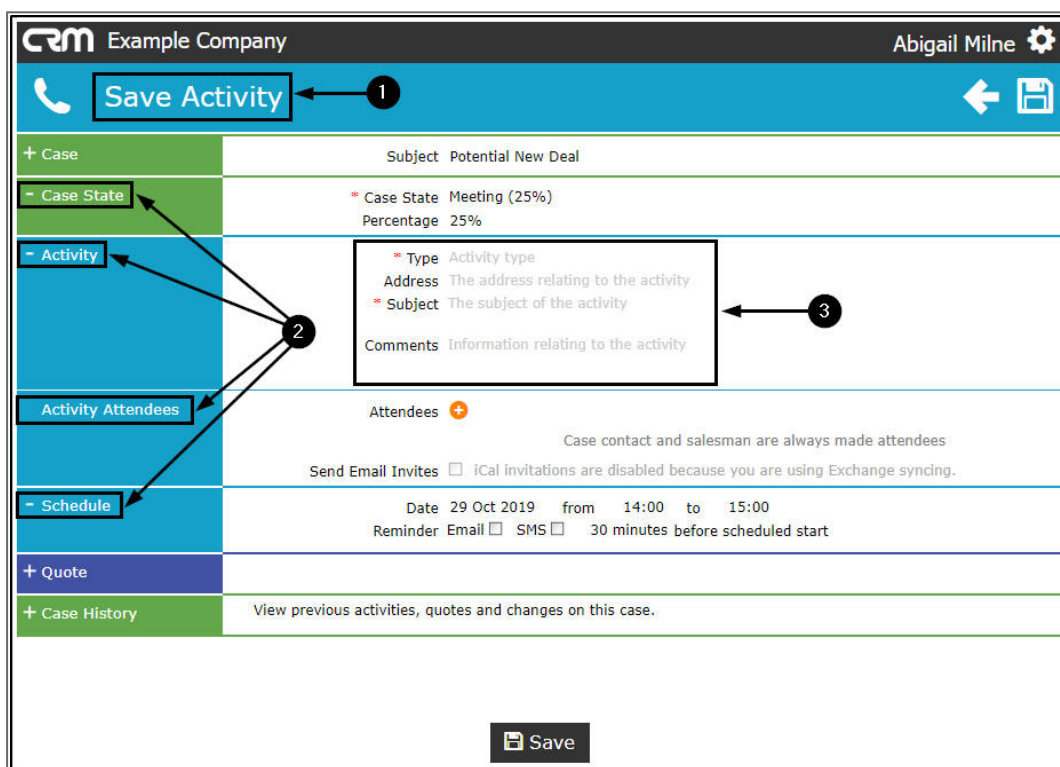
1. In the **My Cases** page, hover anywhere over a Case to display the **Action Items** buttons.
2. Click on the **New Activity** icon.

CRM Example Company				Abigail Milne
My Cases				
Subject	Contact Name	Customer Name	Case State Description	Is Pipeline Case
Potential new contract	Customer Mark , Milne Associates			No
Potential New Deal	Customer Gemma Jones , Liberty Jones			No
	Customer Paul Young , Young Designs			No
Possible New Deal Rental - 3 machines	Customer Jason King , King Copiers			No
Email new brochures	Customer Duncan McCreddie , Hope Works			No
Discuss new product range	Customer Jim Saunders , ABC SHoe Co			Yes
New product range	Customer John West , Hope Works			Yes
Present 2019 product range	Customer Lucy , ABI Goods			Yes
Email updated copier price list	Customer Duncan McCreddie , Hope Works			No
Mr Lovely from Lovely Test Customer, which is a Platinum customer, has a rank call due today, 15 Oct 2019.				
	Customer Mr Lovely , Lovely Test Customer			No

Page 1 of 2 (12 items) [1] 2 [All] Page size: 10

1. The **Save Activity** page will be displayed.
2. The following frames will be auto-expanded:
  - **Case State** The **Case State can be edited**, if required.
  - **Activity**
  - **Activity Attendees** and
  - **Schedule**
3. Update the Activity Information, if required:
  - **Type:**
    - Click in the **Type** field to display an **Activity Type** drop-down list.
    - Select from this list the applicable type (e.g. Phone call).

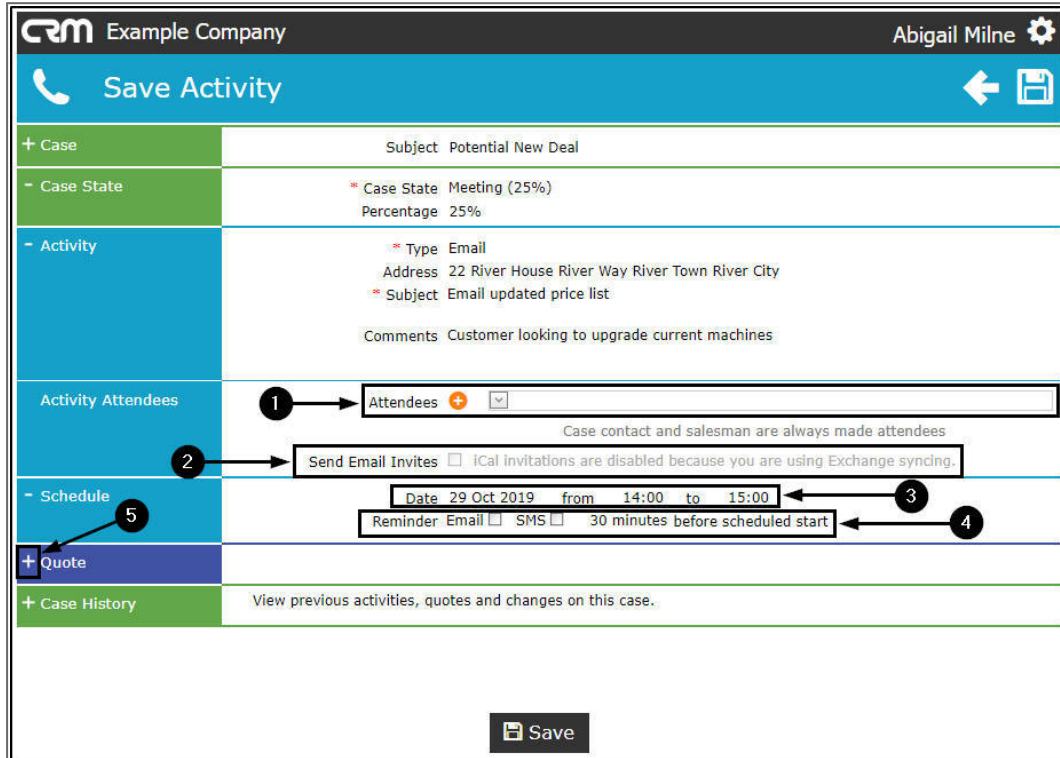
- **Address:**
  - Click in the **Address** field, a list of all addresses linked to the customer will be displayed.
  - Select the applicable address from this list.
- **Subject:**
  - Type in the **Subject** of this activity (e.g. Email updated price list).
- **Comments**
  - Type in a **Comment** relating to this activity (e.g. Customer looking to upgrade current machines).



The screenshot shows the 'Save Activity' form in a CRM system. The form is titled 'CRM Example Company' and 'Abigail Milne'. It has a 'Save Activity' button at the top left. The form is divided into several sections: 'Case' (Subject: Potential New Deal), 'Case State' (Meeting (25%), Percentage: 25%), 'Activity' (Type: Activity type, Address: The address relating to the activity, Subject: The subject of the activity, Comments: Information relating to the activity), 'Activity Attendees' (Attendees: +, Case contact and salesman are always made attendees), 'Schedule' (Date: 29 Oct 2019, from: 14:00, to: 15:00, Reminder: Email, SMS, 30 minutes before scheduled start), 'Quote', and 'Case History' (View previous activities, quotes and changes on this case.). There are numbered callouts: 1 points to the 'Save Activity' button, 2 points to the 'Activity' section, and 3 points to the 'Comments' field. A 'Save' button is at the bottom right.

1. You can select **Attendees** to link to the activity.
  - In this field you can select from **employees** and the **current customer contacts**.
2. You can select to **Send Email Invites** in order to have the system send an email invite for this activity, to all attendees.

3. Schedule the **Date and Time** for the activity.
4. Set a **Reminder** Email or SMS as and if required.
5. In this page, you can link a **Quote** to this Case. Refer to **Add a new Quote linked to this Case** for more information.



CRM Example Company Abigail Milne

**Save Activity**

**+ Case** Subject: Potential New Deal

**- Case State** Case State: Meeting (25%) Percentage: 25%

**- Activity** Type: Email Address: 22 River House River Way River Town River City Subject: Email updated price list Comments: Customer looking to upgrade current machines

**Activity Attendees** 1 → Attendees + Case contact and salesman are always made attendees

2 → Send Email Invites ☐ iCal invitations are disabled because you are using Exchange syncing.

**- Schedule** 5 → Date: 29 Oct 2019 from 14:00 to 15:00 3 → 4 → Reminder: Email ☐ SMS ☐ 30 minutes before scheduled start

**+ Quote**

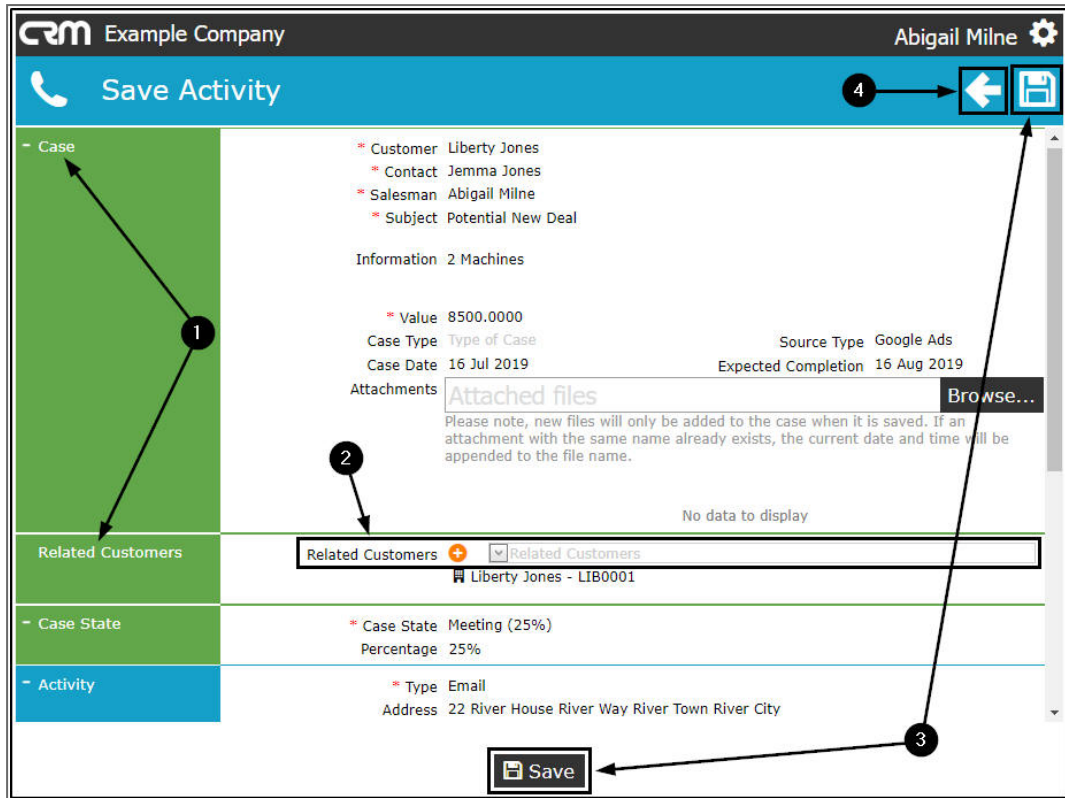
**+ Case History** View previous activities, quotes and changes on this case.

**Save**

1. Once you have added Attendees, you may also wish to link **Related Customers** in order to invite contacts from various clients to an Activity - such as a meeting or training session. (these are not found in the Attendees list).
2. Click on the **expand** button in the **Case** frame.

1. The Case frame will be expanded to reveal the ***Related Customers*** frame.
2. Follow the process to **add the Related Customer(s)**, if required.
3. When you have finished adding the new activity details for this case, click on ***Save*** to return to the ***My Cases*** listing page .
4. If you do not wish to save any changes, click on the ***Back*** button to return to the previous page.





**CRM Example Company** Abigail Milne

**Save Activity**

**Case**

- \* Customer: Liberty Jones
- \* Contact: Jemma Jones
- \* Salesman: Abigail Milne
- \* Subject: Potential New Deal

Information: 2 Machines

\* Value: 8500.0000

Case Type: Type of Case

Case Date: 16 Jul 2019

Source Type: Google Ads

Expected Completion: 16 Aug 2019

Attachments: **Attached files** Browse...

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.

No data to display

**Related Customers**

Related Customers Related Customers

Liberty Jones - LIB0001

**Case State**

\* Case State: Meeting (25%)

Percentage: 25%

**Activity**

\* Type: Email

Address: 22 River House River Way River Town River City

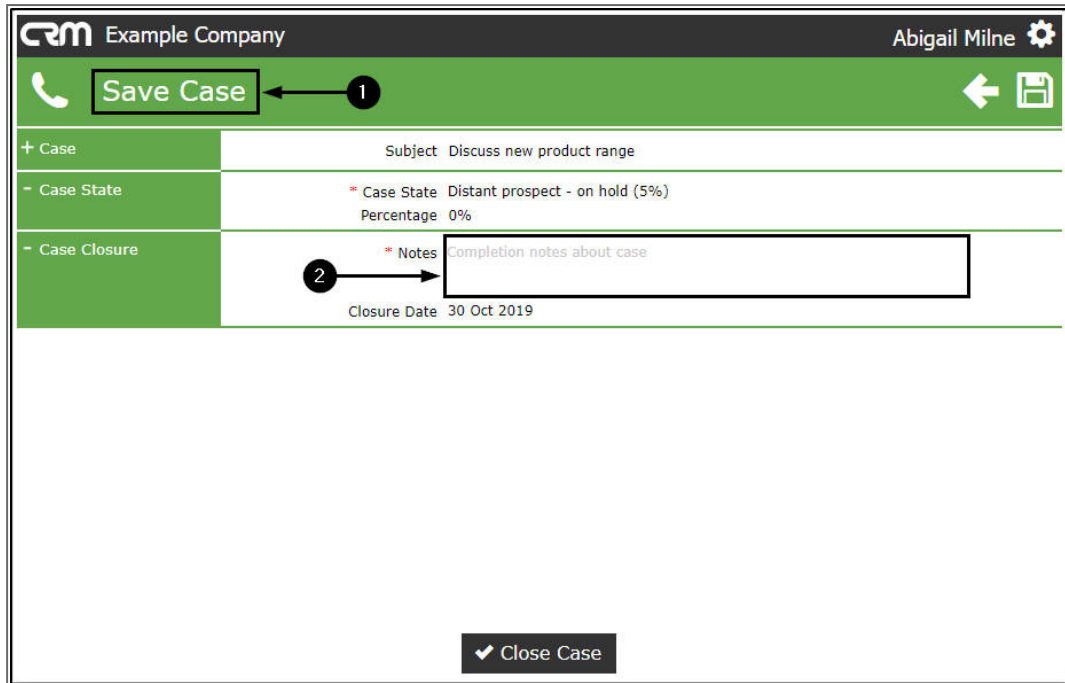
**Save**

## CLOSE THIS CASE

1. In the **My Cases** page, hover anywhere over a Case to display the **Action Items** buttons.
2. Click on the **Close this Case** icon.

CRM Example Company				Abigail Milne
My Cases				
Subject	Contact Name	Customer Name	Case State Description	Is Pipeline Case
Potential new contract	Customer Mark , Milne Associates		Is Pipeline Case	No
Potential New Deal	Customer Jemma Jones , Liberty Jones		Is Pipeline Case	No
	Customer Paul Young , Young Designs		Is Pipeline Case	No
Possible New Deal Rental - 3 machines	Customer Jason King , King Copiers		Is Pipeline Case	No
Email new brochures	Customer Duncan McCreddie , Hope Works		Is Pipeline Case	No
Discuss new product range	Customer Jim Saunders , ABC SHoe Co		Is Pipeline Case	Yes
New product range	Customer John West , Hope Works		Is Pipeline Case	Yes
Present 2019 product range	Customer Lucy , ABI Goods		Is Pipeline Case	Yes
Email updated copier price list	Customer Duncan McCreddie , Hope Works		Is Pipeline Case	No
Mr Lovely from Lovely Test Customer, which is a Platinum customer, has a rank call due today, 15 Oct 2019.				
	Customer Mr Lovely , Lovely Test Customer		Is Pipeline Case	No


1. The **Save Case** page will be displayed.
2. Type a completion note/explanation in the **Notes** field (e.g. Customer budget not yet approved for machine upgrade).







1. The **Closure Date** will auto populate with the current date.

If you wish to change this date,

2. Either, type the correct date directly in this field,
3. Or, click in this field to display a drop-down arrow, click on this arrow to bring up the calendar function.
4. Select the applicable alternative date.
5. Click on **Close Case**.


Example Company

Abigail Milne



Save Case



+ Case

Subject: Discuss new product range

- Case State

\* Case State: Distant prospect - on hold (5%)  
Percentage: 0%

- Case Closure

\* Notes: Customer experiencing budget cuts, upgrade postponed.

1

Closure Date

2

3


4

5

October 2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Today
Clear


Close Case

1. You will return to the **My Cases** listing screen.
2. The recently closed case (in this example for ABC Shoes Co) will have been **removed** from this list.



Subject	Contact Name	Customer Name	Case State Description	Is Pipeline Case
Potential new contract	Customer Mark , Milne Associates		Is Pipeline Case	No
Potential New Deal	Customer Jemma Jones , Liberty Jones		Is Pipeline Case	No
	Customer Paul Young , Young Designs		Is Pipeline Case	No
Possible New Deal Rental - 3 machines	Customer Jason King , King Copiers		Is Pipeline Case	No
Email new brochures	Customer Duncan McCreddie , Hope Works		Is Pipeline Case	No
New product range	Customer John West , Hope Works		Is Pipeline Case	Yes
Present 2019 product range	Customer Lucy , ABI Goods		Is Pipeline Case	Yes
Email updated copier price list	Customer Duncan McCreddie , Hope Works		Is Pipeline Case	No
Mr Lovely from Lovely Test Customer, which is a Platinum customer, has a rank call due today, 15 Oct 2019.	Customer Mr Lovely , Lovely Test Customer		Is Pipeline Case	No
Client upgrading machines	Customer Josh Meyers , Bits and Bytes		Is Pipeline Case	Yes


Page 1 of 2 (11 items) [1] 2 [All] Page size: 10


## WIN THIS CASE




**Note on Stage Gates:** A Case cannot be Won using the Action Buttons, if this Case Type has Stage Gates Configured / Enabled. All Stage Gate Questions will need to be answered first, in order to 'Win the Case'.











1. Hover anywhere over a Case to display the **Action Items** buttons.
2. Click on the **Won this Case** icon.



**Note:** A Case cannot be Won via Case Action Buttons - if this Case Type has Stage Gates Enabled. All Stage Gate Questions will need to be responded to, in order to 'Win the Case'.




Example Company



Abigail Milne







My Cases




Subject	Contact Name	Customer Name	Case State Description	Is Pipeline Case
 Potential new contract	Customer	Mark , Milne Associates		Is Pipeline Case No
 Potential New Deal	Customer	Jemma Jones , Liberty Jones		Is Pipeline Case No
	Customer	Paul Young , Young Designs		Is Pipeline Case No
 Possible New Deal Rental - 3 machines	Customer	Jason King , King Copiers		Is Pipeline Case No
 Email new brochures	Customer	Duncan McCreddie , Hope Works		Is Pipeline Case No
 New product range	Customer	John West , Hope Works		Is Pipeline Case Yes
 Present 2019 product range	Customer	Lucy , ABI Goods		Is Pipeline Case Yes
 Email updated copier price list	Customer	Duncan McCreddie , Hope Works		Is Pipeline Case No
 Mr Lovely from Lovely Test Customer, which is a Platinum customer, has a rank call due today, 15 Oct 2019.	Customer	Mr Lovely , Lovely Test Customer		Is Pipeline Case No
 Client upgrading machines	Customer	Josh Meyers , Bits and Bytes		Is Pipeline Case Yes

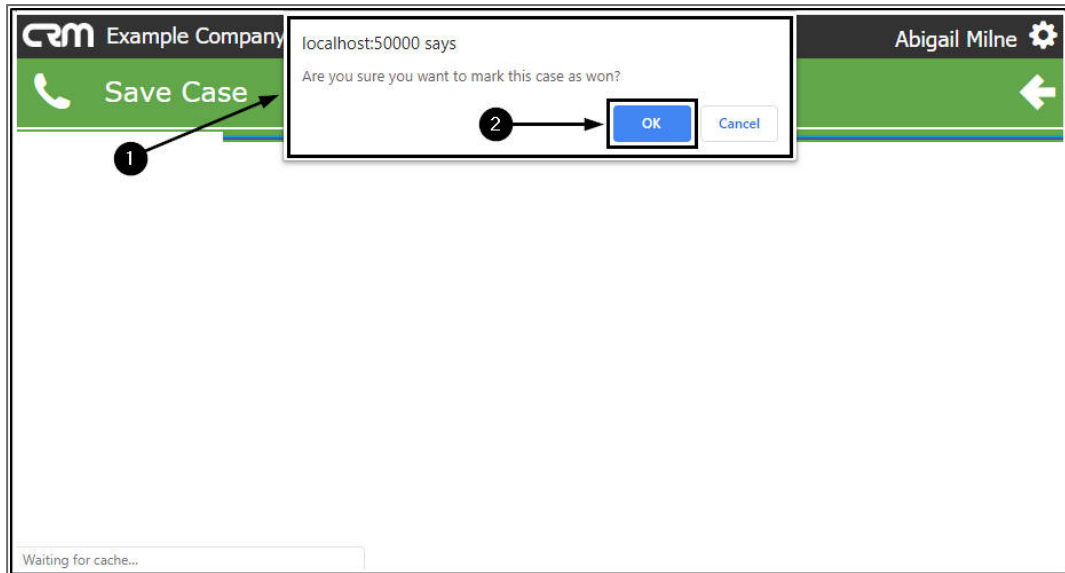



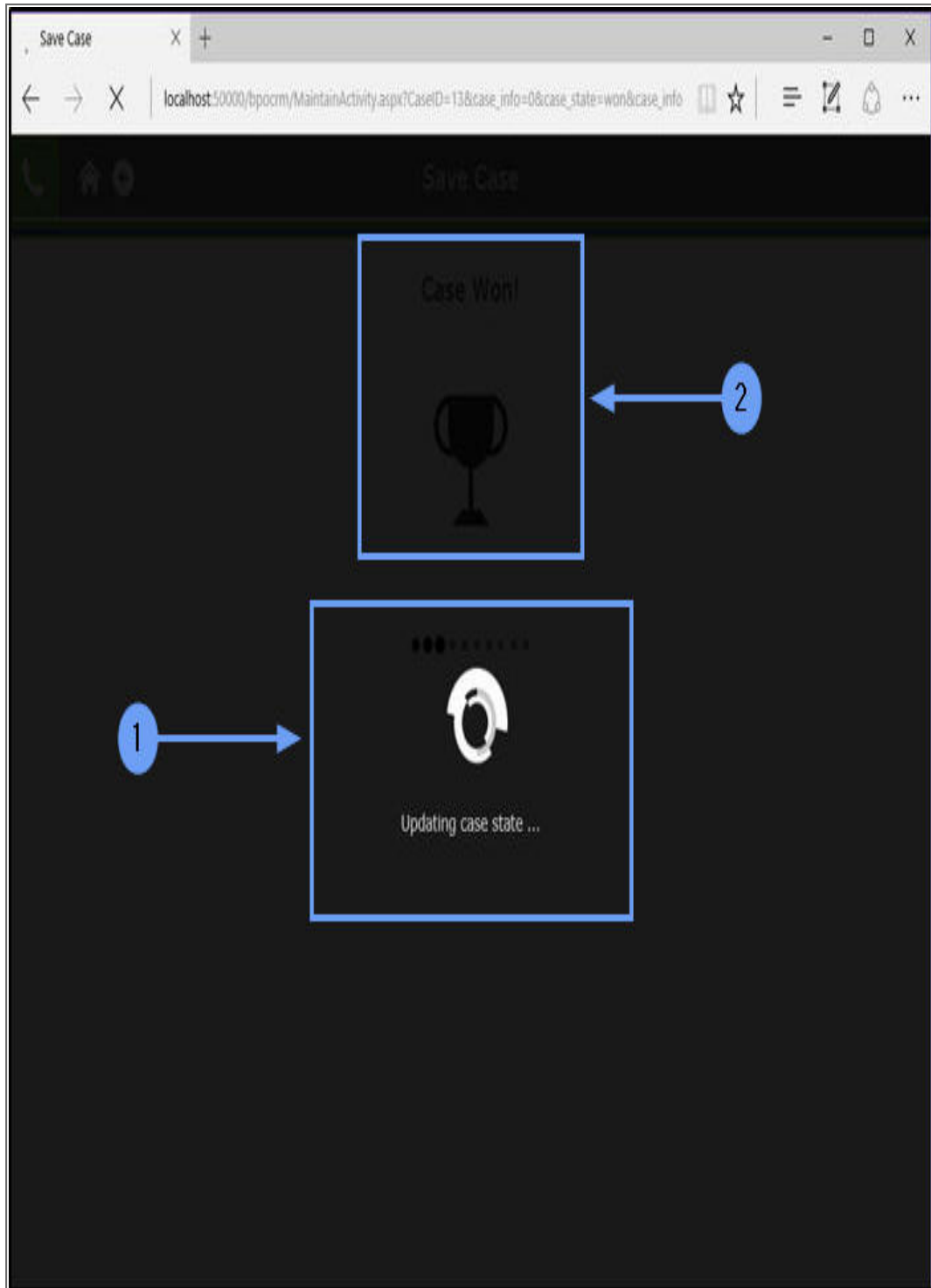
Page 1 of 2 (11 items)





Page size: 10


1. A message box will pop up asking:
  - ***Are you sure you want to mark this case as won?***
2. Click on **OK**.



1. The system will update the case state.
2. A **Case Won** message with a **Trophy** image will briefly flash on the screen.



1. You will return to the **My Cases** screen.
2. The recently won case will no longer be displayed in this list.










Subject	Contact Name	Customer Name	Case State Description	Is Pipeline Case
Potential new contract	Customer Mark , Milne Associates			No
Potential New Deal	Customer Jemma Jones , Liberty Jones			No
	Customer Paul Young , Young Designs			No
Possible New Deal Rental - 3 machines	Customer Jason King , King Copiers			No
Email new brochures	Customer Duncan McCreddie , Hope Works			No
New product range	Customer John West , Hope Works			Yes
Email updated copier price list	Customer Duncan McCreddie , Hope Works			No
Mr Lovely from Lovely Test Customer, which is a Platinum customer, has a rank call due today, 15 Oct 2019.	Customer Mr Lovely , Lovely Test Customer			No
Client upgrading machines	Customer Josh Meyers , Bits and Bytes			Yes
Client upgrading machines	Customer Josh Meyers , Bits and Bytes			Yes











## LOST THIS CASE







1. Hover anywhere over a Case to display the **Action Items** buttons.
2. Click on the **Lost this Case** icon.



Example Company




Abigail Milne



My Cases



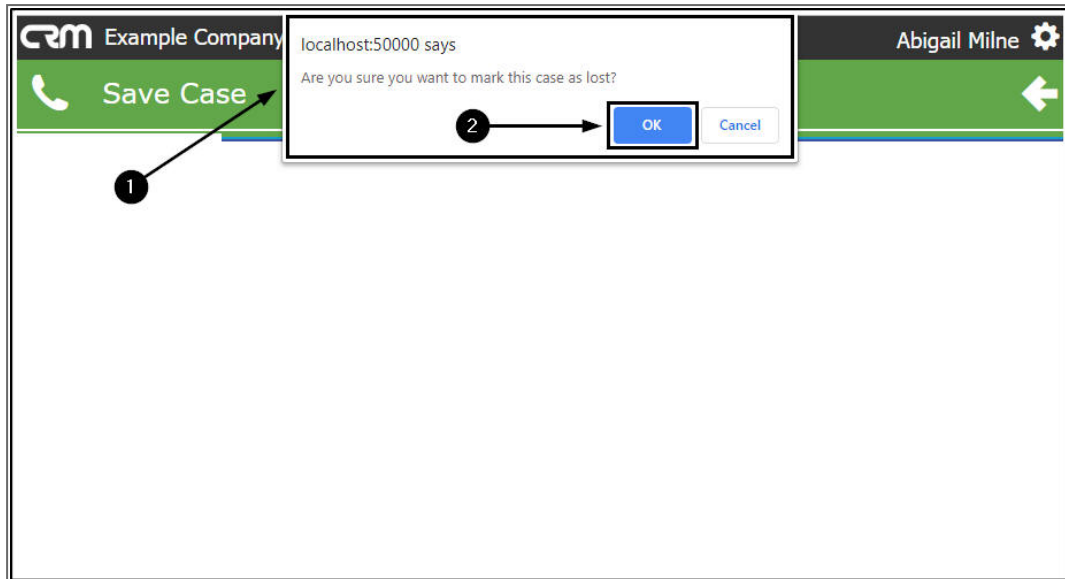
Subject	Contact Name	Customer Name	Case State Description	Is Pipeline Case
 Potential new contract	Customer	Mark , Milne Associates	Is Pipeline Case	No
 Potential New Deal	Customer	Jemma Jones , Liberty Jones	Is Pipeline Case	No
	Customer	Paul Young , Young Designs	Is Pipeline Case	No
 Possible New Deal Rental - 3 machines	Customer	Jason King , King Copiers	Is Pipeline Case	No
 Email new brochures	Customer	Duncan McCreddie , Hope Works	Is Pipeline Case	No
 New product range	Customer	John West , Hope Works	Is Pipeline Case	Yes
 Email updated copier price list	Customer	Duncan McCreddie , Hope Works	Is Pipeline Case	No
 Mr Lovely from Lovely Test Customer, which is a Platinum customer, has a rank call due today, 15 Oct 2019.	Customer	Mr Lovely , Lovely Test Customer	Is Pipeline Case	No
 Client upgrading machines	Customer	Josh Meyers , Bits and Bytes	Is Pipeline Case	Yes
 Client upgrading machines	Customer	Josh Meyers , Bits and Bytes	Is Pipeline Case	Yes

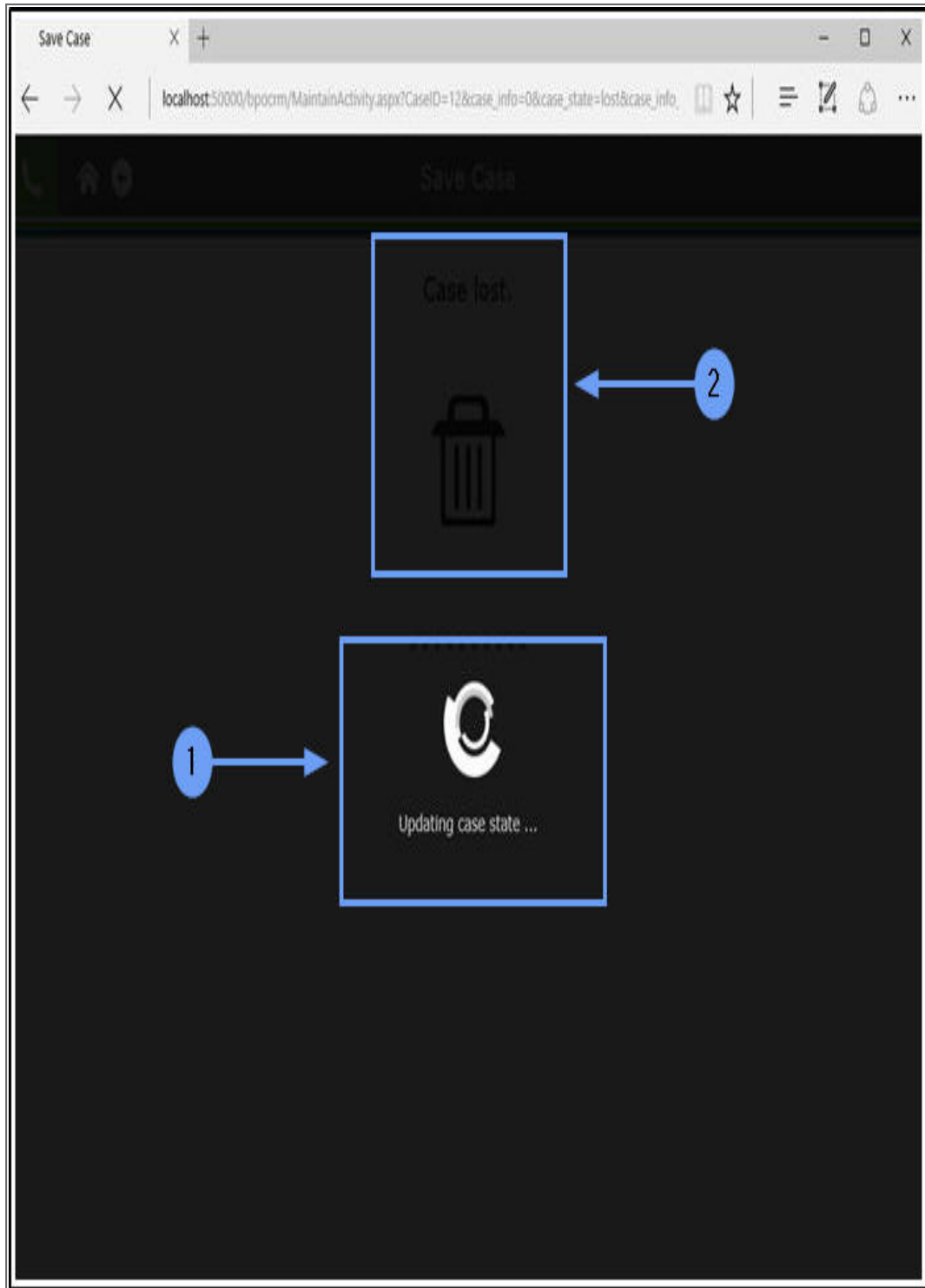


Page 1 of 1 (10 items)



Page size: 10

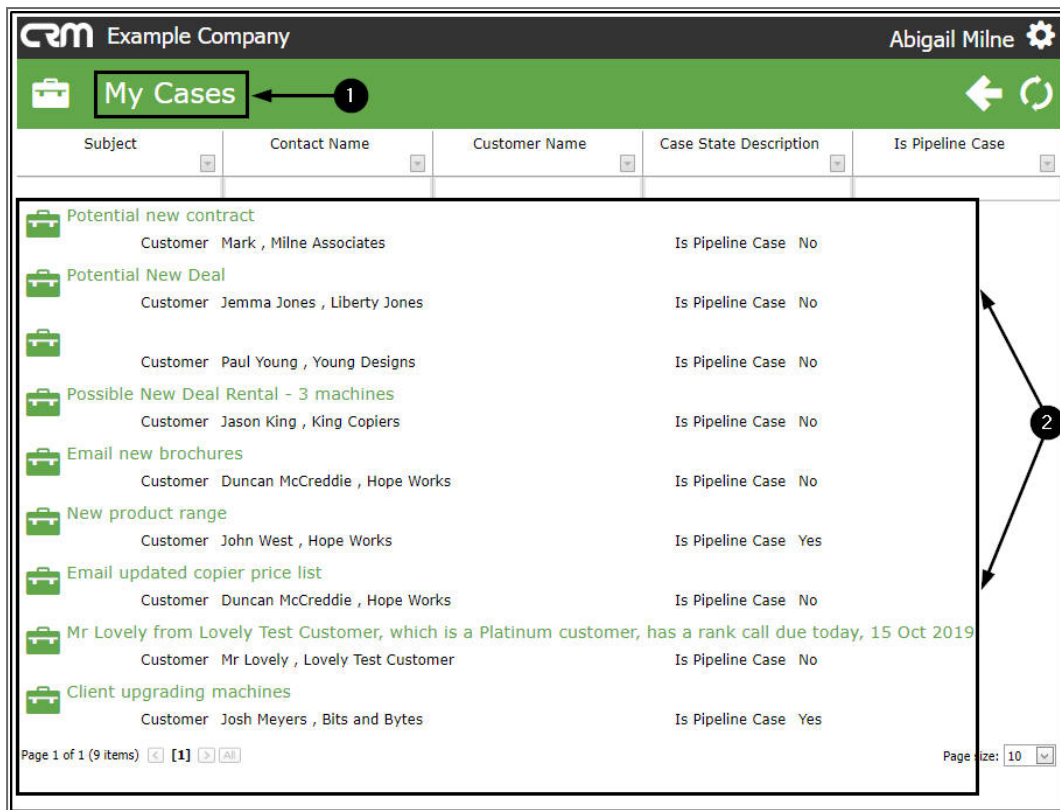
- A message box will pop up asking:
  - Are you sure you want to mark this case as lost?***
- Click on **OK**.



1. The system will update the case state.
2. A **Case Lost** message with a **Trash Bin** image will briefly flash on the screen.



1. You will return to the **My Cases** screen.
2. The recently lost Case will no longer be displayed in this list.



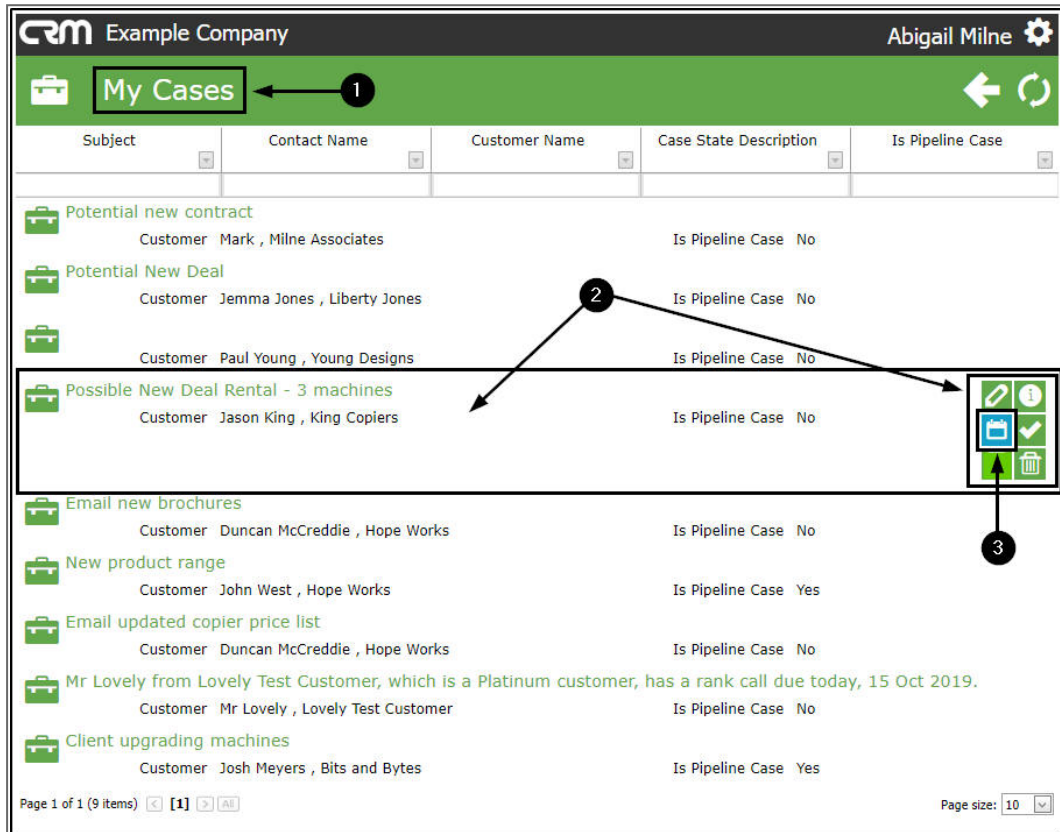
## LINK A QUOTE TO CASE

1. From the (existing) **My Cases** page, you can link a Quote by navigating via the following **Action** buttons:

- **View Case Info and History**
  - The **Save Case** page will open, expand the **Quote** frame.
- **View/Edit this Case**
  - The **Save Case** page will open, expand the **Quote** frame.
- **New Activity**
  - The **Save Activity** page will open, expand the **Quote** frame.

For the purpose of this manual we will navigate from the **Save Activity** page but the **link quote process** is the same from *either* page.


2. Hover anywhere over a Case to display the **Action Items** buttons.
3. Click on the **New Activity** button.





1. The **Save Activity** page will be displayed.



In this particular page, before moving down to the **Quotes** frame, the following mandatory fields must be filled in:

2. **Type:** Click in this field to display an **Activity Type** drop-down list. Select from this list the applicable type (e.g. Email).
3. **Subject:** Type in the **Subject** of this activity (e.g. Email to discuss present client requirements and give overview of new product range).


Example Company

Abigail Milne




Save Activity





+ Case

Subject: Possible New Deal Rental - 3 machines


- Case State

\* Case State: Meeting (25%)  
Percentage: 25%

- Activity

\* Type: 

  
Address: The address relating to the activity  
\* Subject: 

  
Comments: Information relating to the activity

Activity Attendees

Attendees   
Case contact and salesman are always made attendees  
Send Email Invites: ☐ iCal invitations are disabled because you are using Exchange syncing.


- Schedule

Date: 30 Oct 2019 from 13:00 to 14:00  
Reminder: Email ☐ SMS ☐ 30 minutes before scheduled start

+ Quote

+ Case History

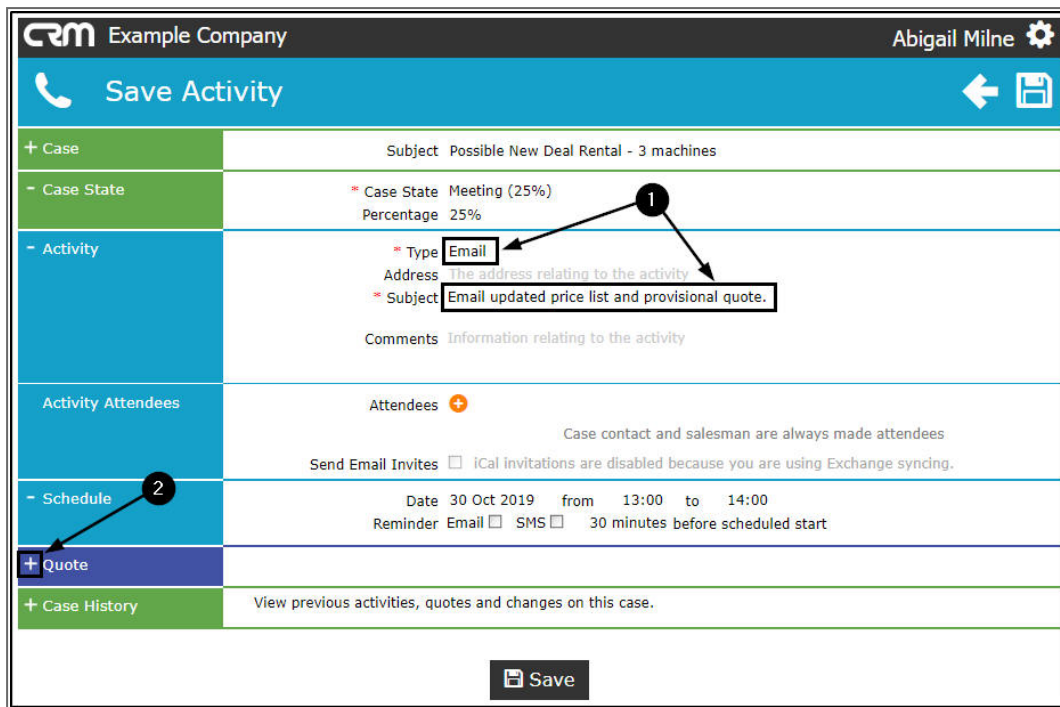
View previous activities, quotes and changes on this case.

 Save

1. When you have filled in the mandatory fields,

## LINK QUOTE PROCESS

2. Click on the **expand** icon in the **Quote** frame.



CRM Example Company Abigail Milne

**Save Activity**

+ Case Subject Possible New Deal Rental - 3 machines

- Case State \* Case State Meeting (25%) Percentage 25%

- Activity \* Type Email Address The address relating to the activity \* Subject Email updated price list and provisional quote. Comments Information relating to the activity

Activity Attendees Attendees + Case contact and salesman are always made attendees Send Email Invites ☐ iCal invitations are disabled because you are using Exchange syncing.

- Schedule Date 30 Oct 2019 from 13:00 to 14:00 Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

+ Quote

+ Case History View previous activities, quotes and changes on this case.

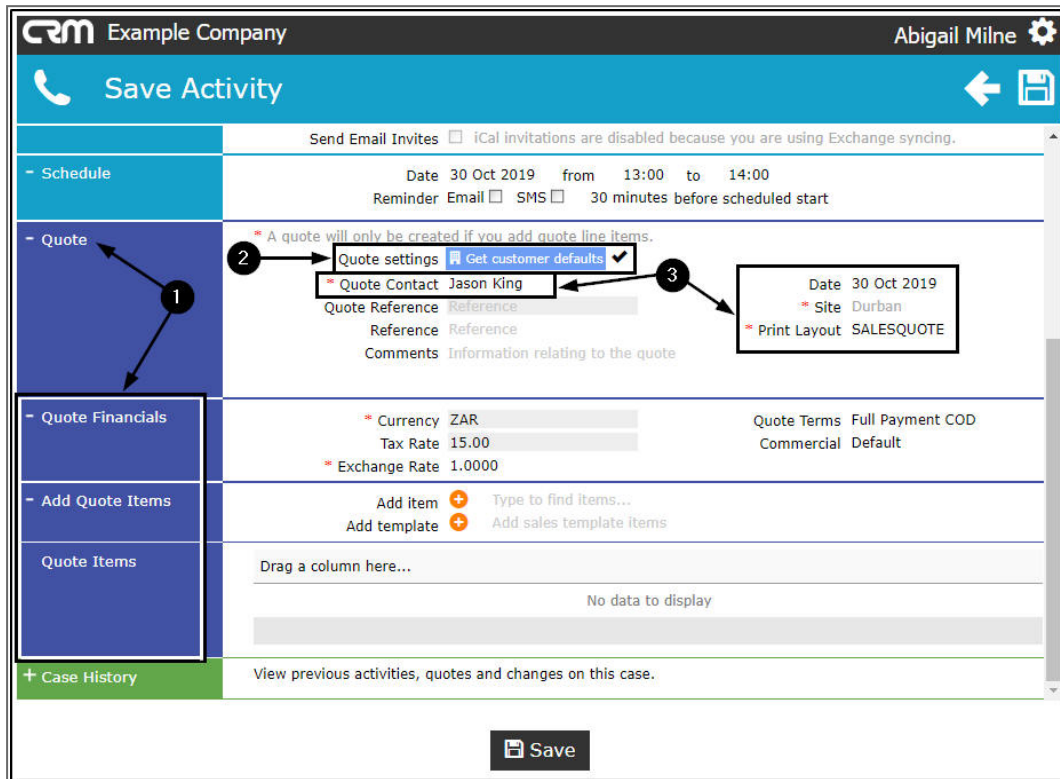
**Save**

1. The **Quote** section will be expanded to expose the:
  - **Quote Financials**
  - **Add Quotes Items**
  - and **Quote Items** frames.
2. **Quote Settings:** As the Quote section is expanded, the system will pull through the customer default information and populate the following fields:
3. **Quote Contact:** This will populate with the contact selected in the Case section.
  - You can click on the drop-down arrow and select an alternative contact from the drop-down list, if required.
4. **Date:** This will populate with the current date.
  - You can either type directly in this field to change the date, or click on the drop-down arrow and use the calendar function to select an alternative date if required.
5. **Site:** This will auto populate with the site set up on the customer. If the Customer is linked to more than one site, there will be an active **drop-**



**down arrow** - you can click on this and select the correct site from the list displayed.

6. **Print Layout:** This will auto populate with *Sales Quote*.



**CRM Example Company** Abigail Milne

**Save Activity**

Send Email Invites ☐ iCal invitations are disabled because you are using Exchange syncing.

**Schedule** Date 30 Oct 2019 from 13:00 to 14:00  
Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

**Quote**

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

Quote settings ☒ Get customer defaults

\* Quote Contact Jason King

Quote Reference Reference

Reference Reference

Comments Information relating to the quote

Date 30 Oct 2019  
\* Site Durban  
\* Print Layout SALESQUOTE

**Quote Financials**

\* Currency ZAR  
Tax Rate 15.00  
\* Exchange Rate 1.0000

Quote Terms Full Payment COD  
Commercial Default

**Add Quote Items**

Add item  Type to find items...  
Add template  Add sales template items

**Quote Items**

Drag a column here...

No data to display

**+ Case History** View previous activities, quotes and changes on this case.

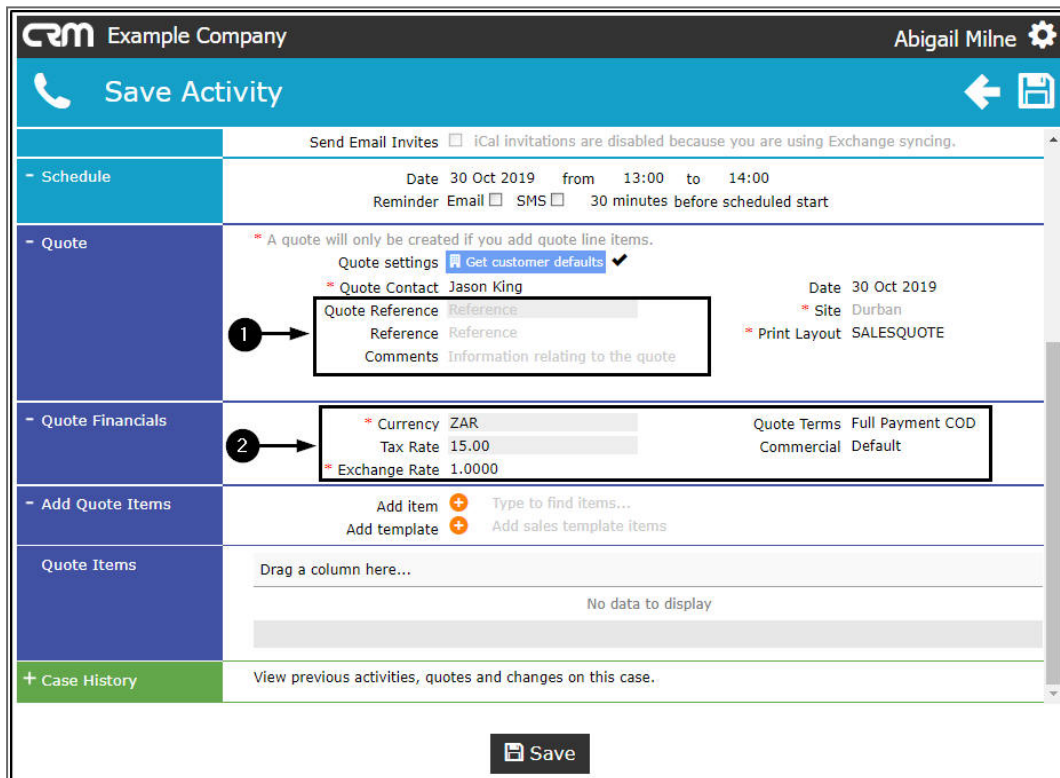
**Save**

1. **Quote Reference:** The system will allocate a reference number as the quote is saved.
2. **Reference:** Type in a reference for this quote.
3. **Comments:** Type in a comment/additional information relating to this quote.

## QUOTE FINANCIALS

2. **Currency:** This will auto populate with the currency set up on the customer. You can click on the drop-down arrow and select an alternative currency, if required.

3. **Tax Rate:** This will auto populate with the tax rate set up on the customer.
4. **Exchange Rate:** This will auto populate with the exchange rate set up on the customer.
5. **Quote Terms:** This is the quote repayment factor and should be configured in **Static Data: Sales Quote Terms or Repayment Method** This will auto populate with Full Payment COD.
  - You can click on the drop-down arrow and select an alternative payment period, if required.
6. **Commercial:** This will auto populate with the **commercial** set up on the customer.
  - You can click on the drop-down arrow and select an alternative commercial, if required.



**CRM Example Company** Abigail Milne

**Save Activity**

Send Email Invites ☐ iCal invitations are disabled because you are using Exchange syncing.

**Schedule**  
 Date 30 Oct 2019 from 13:00 to 14:00  
 Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

**Quote**  
 \* A quote will only be created if you add quote line items.  
 Quote settings [Get customer defaults](#) ✓  
 \* Quote Contact Jason King  
 Quote Reference Reference  
 Reference Reference  
 Comments Information relating to the quote  
 Date 30 Oct 2019  
 \* Site Durban  
 \* Print Layout SALESQUOTE

**Quote Financials**  
 \* Currency ZAR  
 Tax Rate 15.00  
 \* Exchange Rate 1.0000  
 Quote Terms Full Payment COD  
 Commercial Default

**Add Quote Items**  
 Add item + Type to find items...  
 Add template + Add sales template items

**Quote Items**  
 Drag a column here...  
 No data to display

**+ Case History**  
 View previous activities, quotes and changes on this case.

**Save**

## ADD QUOTE ITEMS

You now have the ability to add single items to a quote.

**Note:** For Part Numbers to pull through to this list - you need to ensure that the **Quote Products are specified**.

- In the **Add item** field, start typing the **code** or **description** of the item you wish to link to this quote.

CRM Example Company Abigail Milne

Save Activity

Send Email Invites ☐ iCal invitations are disabled because you are using Exchange syncing.

**Schedule** Date 30 Oct 2019 from 13:00 to 14:00  
Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

**Quote** \* A quote will only be created if you add quote line items.  
Quote settings [Get customer defaults](#) ☒  
Quote Contact Jason King Date 30 Oct 2019  
Quote Reference Reference \* Site Durban  
Reference Reference \* Print Layout SALESQUOTE  
Comments Information relating to the quote

**Quote Financials** \* Currency ZAR Quote Terms Full Payment COD  
Tax Rate 15.00 Commercial Default  
\* Exchange Rate 1.0000

**Add Quote Items** Add item   
Add template

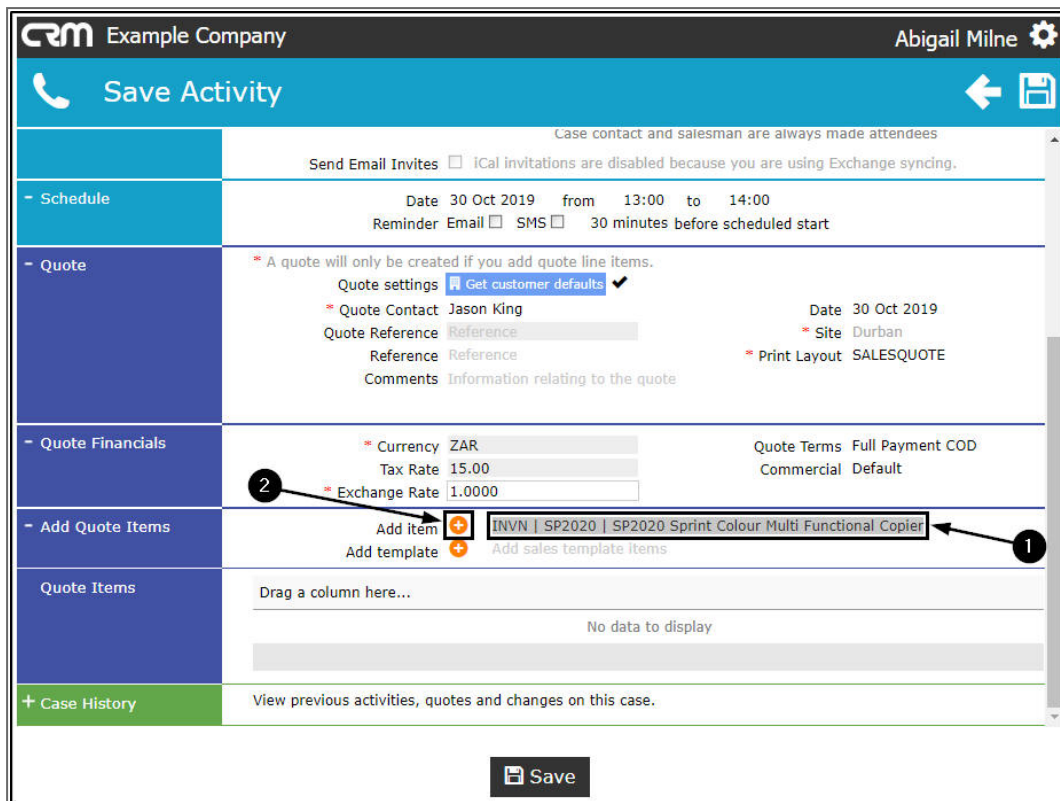
**Quote Items** Drag a column here...  
No data to display

**Case History** View previous activities, quotes and changes on this case.

Save

1. As you start typing in the field, a **Type**, **Code** and **Description** list of all items on the system, will be displayed.
2. The system will **filter** for the item that you are searching for.
3. Select the applicable **item** from this list.

1. The selected item code and description will populate the **Add** item field.
2. Click on the **plus[+]** button.



1. The item will be added to the **Quote Items** frame.
2. You will note that there are **2** action buttons linked to this item.
  - An **Edit** button. This will enable you to edit the item details e.g. quantity, price, if required.
  - A **Delete** button. This will enable you to delete the item from the quote, if required.

## EDIT QUOTE ITEM

3. Click on the **Edit** button.

**CRM Example Company** Abigail Milne

**Save Activity**

**Comments** Information relating to the activity.

**Activity Attendees** Attendees +  
Case contact and salesman are always made attendees  
Send Email Invites ☐ iCal invitations are disabled because you are using Exchange syncing.

**Schedule**  
Date 30 Oct 2019 from 13:00 to 14:00  
Reminder Email ☐ SMS ☐ 30 minutes before scheduled start.

**Quote**  
\* A quote will only be created if you add quote line items.  
Quote settings ☒ Get customer defaults  
\* Quote Contact Jason King Date 30 Oct 2019  
Quote Reference Reference \* Site Durban  
Reference Reference \* Print Layout SALESQUOTE  
Comments Information relating to the quote

**Quote Financials**  
\* Currency ZAR  
Tax Rate 15.00  
\* Exchange Rate 1.0000  
Quote Terms Full Payment COD  
Commercial Default

**Add Quote Items**  
Add item + ☒ Type to find items...  
Add template + Add sales template 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 Multi Functional Copier	1	5610.67	5400.00		5400.00		6210.00	
				5610.67	5400.00	0.00	5400.00		6210.00	

**+ Case History** View previous activities, quotes and changes on this case.

**Save**

1. An **edit item** frame will be displayed.

Here you can make changes to the following details:

2. **Item Description**
3. **Item Quantity**
4. **Item Unit Cost**
5. **Item Price**
6. Click on the **Apply Changes** icon [ ] to save your changes or the the **Cancel changes** icon [ ] to cancel the changes, as required.

CRM

Example Company

Abigail Milne

Save Activity

Send Email Invites

☐ iCal invitations are disabled because you are using Exchange syncing.

Schedule

Date

30 Oct 2019

from

13:00

to

14:00

Reminder

Email

☐

SMS

☐

30 minutes before scheduled start

Quote

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

Quote settings

Get customer defaults

✓

Quote Contact

Jason King

Date

30 Oct 2019

Quote Reference

Reference

Site

Durban

Reference

Reference

Print Layout

SALESQUOTE

Comments

Information relating to the quote

Quote Financials

Currency

ZAR

Quote Terms

Full Payment COD

Tax Rate

15.00

Commercial

Default

Exchange Rate

1.0000

Add Quote Items

Add item

Type to find items...

Add template

Add sales template items

Quote 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 Multi Functional Copier	1	5610.67	5400.00		5400.00		6210.00	

1

Quote Item Description

SP2020 Sprint Colour Mu

Quantity

1

Unit Cost

5610.674500

Item Price

5400.0000

2

3

4

5

6

✓

✗

Case History

View previous activities, quotes and changes on this case.

Save

1. In this example, the **Quantity** has been updated to **2**.
2. The **Total** and **Total Inclusive** columns will update accordingly.

## LINK ADDITIONAL QUOTE ITEMS

3. In the **Add item** field, start typing the **code** or **description** of the next item that you wish to add to the quote.

CRM

Example Company

Abigail Milne

Save Activity

Comments

Information relating to the activity.

Activity Attendees

Attendees

Case contact and salesman are always made attendees

Send Email Invites ☐ iCal invitations are disabled because you are using Exchange syncing.

Schedule

Date

30 Oct 2019

from

13:00

to

14:00

Reminder

Email ☐ SMS ☐

30 minutes before scheduled start.

Quote

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

Quote settings ☒ Get customer defaults

\* Quote Contact Jason King

Quote Reference Reference

Reference Reference

Comments Information relating to the quote

Date 30 Oct 2019

\* Site Durban

\* Print Layout SALESQUOTE

Quote Financials

\* Currency ZAR

Tax Rate 15.00

\* Exchange Rate 1.0000

Quote Terms Full Payment COD

Commercial Default

Add Quote Items

Add item

Type to find items...

Add template

Add sales template items

Quote 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 Multi Functional Copier	2	5610.67	5400.00		10800.00		12420.00	
				5610.67	5400.00	0.00	10800.00		12420.00	

Case History

View previous activities, quotes and changes on this case.

Save

- As you start typing in the field, the **Type**, **Code** and **Description** list will again be displayed.
- The system will **filter** for the item that you are searching for.
- Select the applicable **item** from this list.



CRM Example Company

Abigail Milne

Save Activity

Comments

Information relating to the activity

Activity Attendees

Attendees

Case contact and salesman are always made attendees

Send Email Invites ☐ iCal invitations are disabled because you are using Exchange syncing.

Schedule

Date 30 Oct 2019 from 13:00 to 14:00

Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

Quote

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

Quote settings ☒ Get customer defaults

Quote Contact Jason King

Quote Reference Reference

Reference Reference

Comments Information relating to the quote

Date 30 Oct 2019

Site Durban

\* Print Layout SALESQUOTE

Quote Financials

\* Currency ZAR

Tax Rate 15.00

\* Exchange Rate 1.0000

Quote Terms Full Payment COD

Commercial Default

Add Quote Items

Add item

Add template

black toner

Type

Code

Description

#

INVN

2020-147K

Black toner SP2020

2

INVN

SP19-147K

Black Toner SP1919

4

INVN

147-988544

K14 Black toner

14

INVN

12-098765

SP19-1 Black Toner

23

INVN

204-147K

SP20 Black Toner

27

INVN

147258

Black Toner

31

INVN

540-147K

Compatible black toner

55

Case History

View previous activities, quotes and changes on this case.

Save

1. The additional item code and description will populate the **Add** item field.
2. Click on the **plus [+]** button.

CRM Example Company

Abigail Milne

Save Activity

Send Email Invites ☐ iCal invitations are disabled because you are using Exchange syncing.

Case contact and salesman are always made attendees

Schedule

Date 31 Oct 2019 from 11:00 to 12:00

Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

Quote

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

Quote settings ☒ Get customer defaults

Quote Contact Jason King

Quote Reference Reference

Reference KCQU101

Comments Information relating to the quote

Date 31 Oct 2019

Site Durban

\* Print Layout SALESQUOTE

Quote Financials

\* Currency South African Rand

Tax Rate 15.00

\* Exchange Rate 1.0000

Quote Terms Full Payment COD

Commercial Default

Add Quote Items

Add item

Add template

INVN | 2020-147K | Black toner SP2020

Quote 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 Multi Functional Copier	2	5610.67	5400.00		10800.00		12420.00	
				5610.67	5400.00	0.00	10800.00		12420.00	

Case History

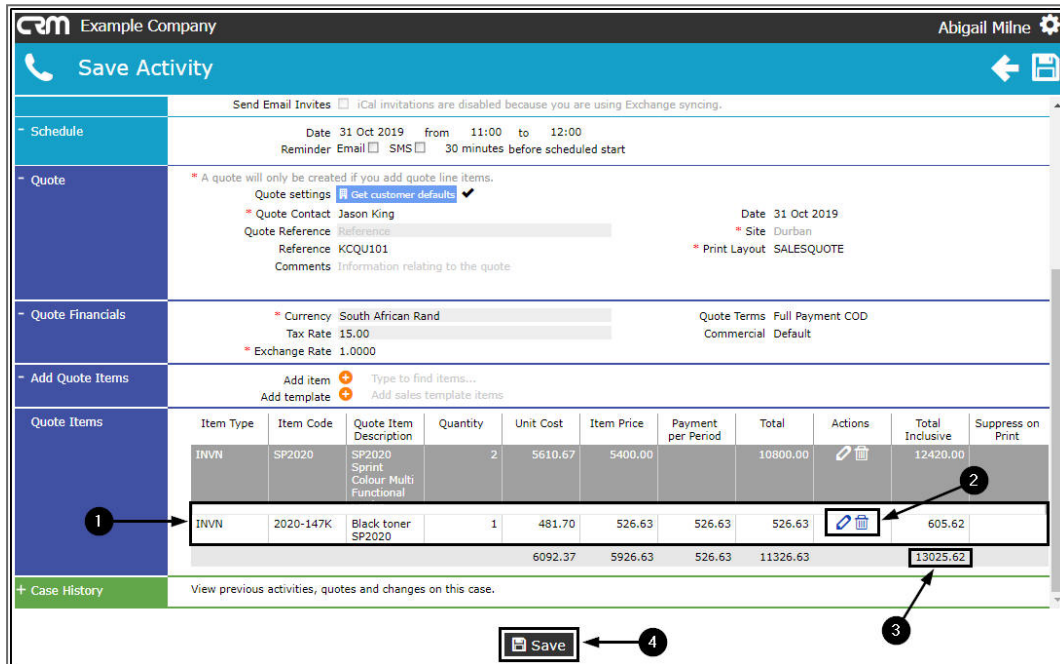
View previous activities, quotes and changes on this case.

Save

1. The additional item will be added to the **Quote Items** frame.
2. Edit the details, if required.
3. The quote **Total Inclusive** amount will update to include this item.

## SAVE QUOTE (SAVE ACTIVITY)

4. When you have finished adding items to the Quote sections, click on **Save**.



**CRM Example Company** Abigail Milne

**Save Activity**

Send Email Invites ☐ iCal invitations are disabled because you are using Exchange syncing.

**Schedule**  
 Date: 31 Oct 2019 from 11:00 to 12:00  
 Reminder: Email ☐ SMS ☐ 30 minutes before scheduled start

**Quote**  
 \* A quote will only be created if you add quote line items.  
 Quote settings: [Get customer defaults](#) ✓  
 \* Quote Contact: Jason King Date: 31 Oct 2019  
 \* Site: Durban  
 Quote Reference: Reference \* Print Layout: SALESQUOTE  
 Reference: KCQU101  
 Comments: Information relating to the quote.

**Quote Financials**  
 \* Currency: South African Rand Quote Terms: Full Payment COD  
 Tax Rate: 15.00 Commercial Default  
 \* Exchange Rate: 1.0000

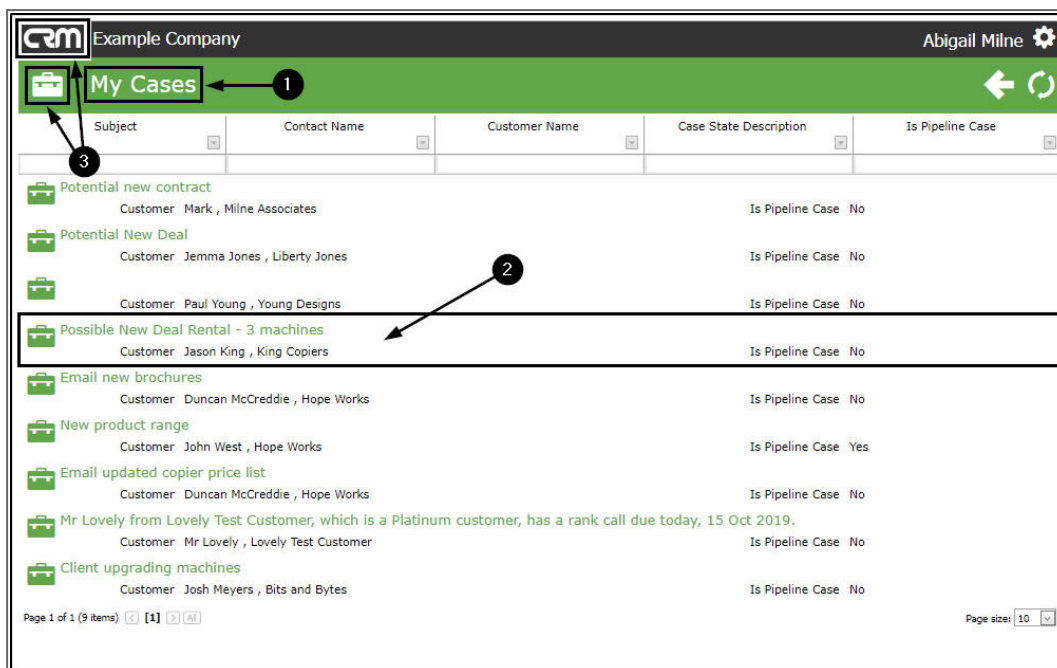
**Add Quote Items**  
 Add item + Type to find items...  
 Add template + Add sales template items

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 Multi Functional	2	5610.67	5400.00		10800.00		12420.00	
INVN	2020-147K	Black toner SP2020	1	481.70	526.63	526.63	526.63		605.62	
				6092.37	5926.63	526.63	11326.63		13025.62	

**Case History** View previous activities, quotes and changes on this case.

**Save**

1. The quote details will be saved and you will return to the **My Cases** screen.
2. The case that you linked the quote to, can still be viewed in this list.
3. Click on the **Case** icon or **CRM** logo to return to the **Dashboard** (Home page).

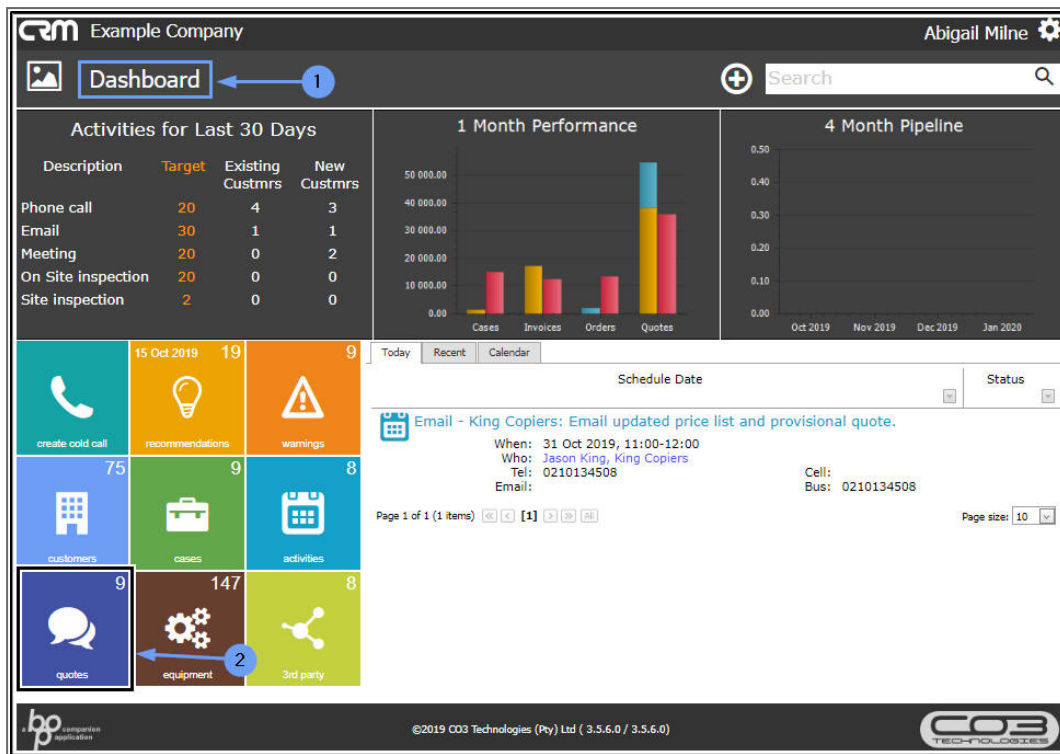


Subject	Contact Name	Customer Name	Case State Description	Is Pipeline Case
Potential new contract	Customer Mark , Milne Associates			No
Potential New Deal	Customer Jemma Jones , Liberty Jones			No
	Customer Paul Young , Young Designs			No
Possible New Deal Rental - 3 machines	Customer Jason King , King Copiers			No
Email new brochures	Customer Duncan McCreddie , Hope Works			No
New product range	Customer John West , Hope Works			Yes
Email updated copier price list	Customer Duncan McCreddie , Hope Works			No
Mr Lovely from Lovely Test Customer, which is a Platinum customer, has a rank call due today, 15 Oct 2019.	Customer Mr Lovely , Lovely Test Customer			No
Client upgrading machines	Customer Josh Meyers , Bits and Bytes			No

Page 1 of 1 (9 items) [1] [2] [A] Page size: 10

## VIEW QUOTE

1. In the **Dashboard** (Home page), you can navigate to the **Quotes** listing page to view the recently added quote.
2. Click on the **Quotes** tile.



1. The **Quotes** listing page will be displayed.
2. Here you can view the newly created quote.
3. You will note that the system has now allocated a **Quote Reference** number.

**Note 1:** Refer to **CRM Quotes** for more information an adding and editing quotes.

**Note 2:** Refer to **View / Print / Email the Quote** for Quote processing information.

4. Click on the **Quotes** icon or the **CRM** logo to return to the **Dashboard** (Home page).

CRM Example Company

Abigail Milne

Quotes

1

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	New quote	Yes
QT0000210	HOP001	Hope Works	HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000211	KIN0002	King Enterprises	Q/KE/001	6815.62	ZAR	19 Jul 2019	Accepted quote	Yes
QT0000212	KIN0001	King Copiers	Q/KC/9002	13025.62	ZAR	30 Jul 2019	New quote	Yes
QT0000213	TRA0001	Training Wheels	TW001	31050.00	ZAR	14 Oct 2019	Accepted quote	Yes
QT0000214	HOP001	Hope Works		18630.00	ZAR	24 Oct 2019	New quote	No
QT0000215	KIN0001	King Copiers	KCQU101	13025.62	ZAR	31 Oct 2019	New quote	No

Page 1 of 1 (9 items)

1

2

Alt

Page size: 10

3

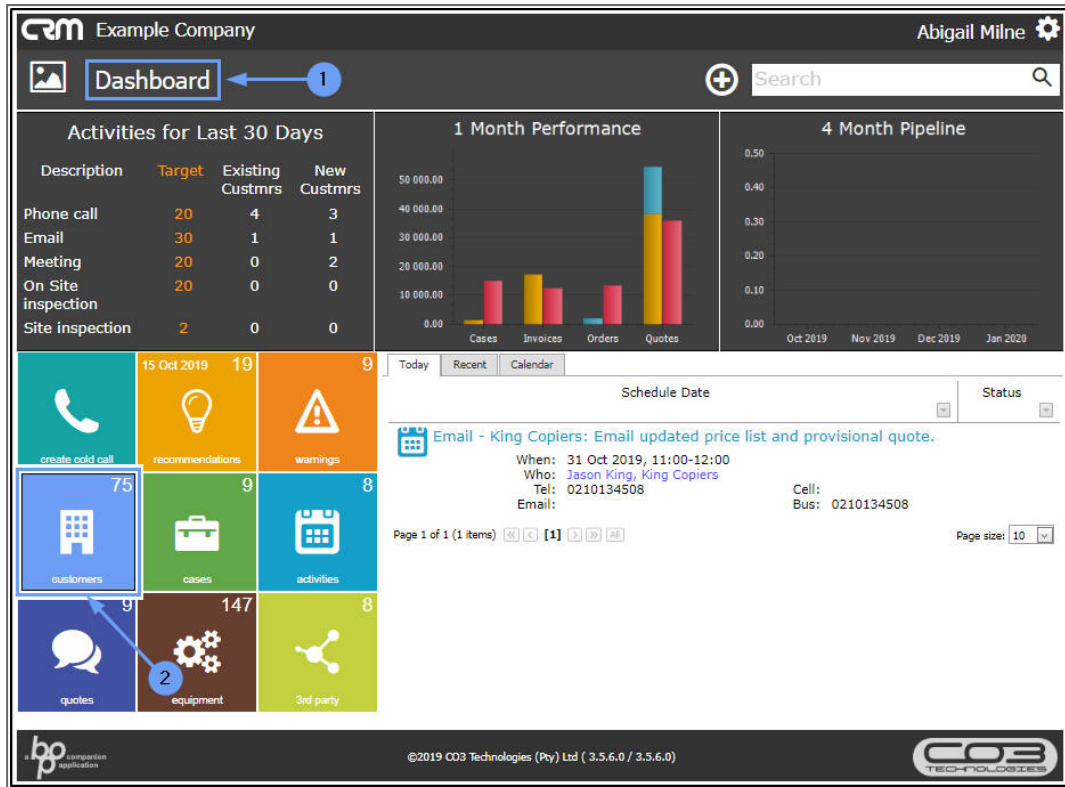
2

## VIEW CUSTOMER-SPECIFIC CASE LIST

(from the [Customer Homepage](#))

You can also access your customer-specific list of Cases from the **Customer Homepage**. You will first need to navigate to a particular Customer Home page.

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



**CRM Example Company** Abigail Milne

**Dashboard** 1 Search

**Activities for Last 30 Days**

Description	Target	Existing Custmrs	New Custmrs
Phone call	20	4	3
Email	30	1	1
Meeting	20	0	2
On Site inspection	20	0	0
Site inspection	2	0	0

**1 Month Performance**

**4 Month Pipeline**

**Dashboard Grid:**

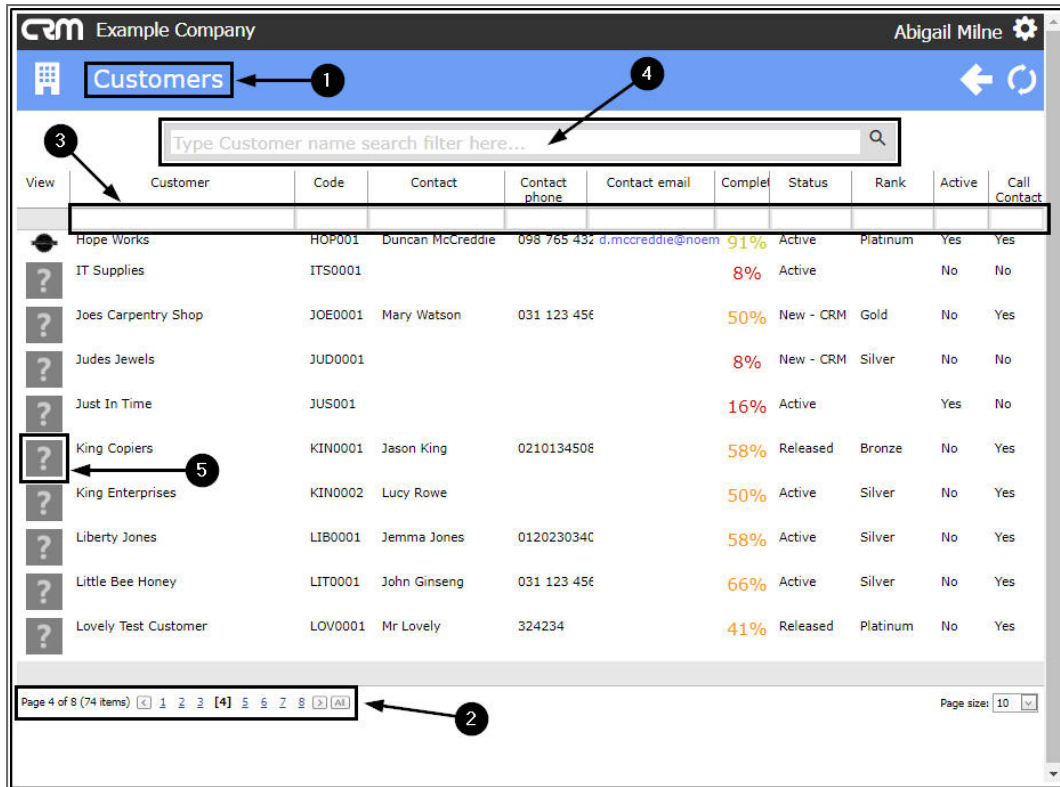
- create cold call (15 Oct 2019, 19)
- recommendations (19)
- warnings (9)
- customers (75) 2
- cases (9)
- activities (8)
- quotes (9)
- equipment (147)
- 3rd party (8)

**Email - King Copiers: Email updated price list and provisional quote.**

When: 31 Oct 2019, 11:00-12:00  
 Who: Jason King, King Copiers  
 Tel: 0210134508  
 Email:   
 Cell:   
 Bus: 0210134508

Page 1 of 1 (1 items) 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100 101 102 103 104 105 106 107 108 109 110 111 112 113 114 115 116 117 118 119 120 121 122 123 124 125 126 127 128 129 130 131 132 133 134 135 136 137 138 139 140 141 142 143 144 145 146 147 148 149 150 151 152 153 154 155 156 157 158 159 160 161 162 163 164 165 166 167 168 169 170 171 172 173 174 175 176 177 178 179 180 181 182 183 184 185 186 187 188 189 190 191 192 193 194 195 196 197 198 199 200 201 202 203 204 205 206 207 208 209 210 211 212 213 214 215 216 217 218 219 220 221 222 223 224 225 226 227 228 229 230 231 232 233 234 235 236 237 238 239 240 241 242 243 244 245 246 247 248 249 250 251 252 253 254 255 256 257 258 259 260 261 262 263 264 265 266 267 268 269 270 271 272 273 274 275 276 277 278 279 280 281 282 283 284 285 286 287 288 289 290 291 292 293 294 295 296 297 298 299 300 301 302 303 304 305 306 307 308 309 310 311 312 313 314 315 316 317 318 319 320 321 322 323 324 325 326 327 328 329 330 331 332 333 334 335 336 337 338 339 340 341 342 343 344 345 346 347 348 349 350 351 352 353 354 355 356 357 358 359 360 361 362 363 364 365 366 367 368 369 370 371 372 373 374 375 376 377 378 379 380 381 382 383 384 385 386 387 388 389 390 391 392 393 394 395 396 397 398 399 400 401 402 403 404 405 406 407 408 409 410 411 412 413 414 415 416 417 418 419 420 421 422 423 424 425 426 427 428 429 430 431 432 433 434 435 436 437 438 439 440 441 442 443 444 445 446 447 448 449 450 451 452 453 454 455 456 457 458 459 460 461 462 463 464 465 466 467 468 469 470 471 472 473 474 475 476 477 478 479 480 481 482 483 484 485 486 487 488 489 490 491 492 493 494 495 496 497 498 499 500 501 502 503 504 505 506 507 508 509 510 511 512 513 514 515 516 517 518 519 520 521 522 523 524 525 526 527 528 529 530 531 532 533 534 535 536 537 538 539 540 541 542 543 544 545 546 547 548 549 550 551 552 553 554 555 556 557 558 559 560 561 562 563 564 565 566 567 568 569 570 571 572 573 574 575 576 577 578 579 580 581 582 583 584 585 586 587 588 589 590 591 592 593 594 595 596 597 598 599 600 601 602 603 604 605 606 607 608 609 610 611 612 613 614 615 616 617 618 619 620 621 622 623 624 625 626 627 628 629 630 631 632 633 634 635 636 637 638 639 640 641 642 643 644 645 646 647 648 649 650 651 652 653 654 655 656 657 658 659 660 661 662 663 664 665 666 667 668 669 670 671 672 673 674 675 676 677 678 679 680 681 682 683 684 685 686 687 688 689 690 691 692 693 694 695 696 697 698 699 700 701 702 703 704 705 706 707 708 709 710 711 712 713 714 715 716 717 718 719 720 721 722 723 724 725 726 727 728 729 730 731 732 733 734 735 736 737 738 739 740 741 742 743 744 745 746 747 748 749 750 751 752 753 754 755 756 757 758 759 760 761 762 763 764 765 766 767 768 769 770 771 772 773 774 775 776 777 778 779 780 781 782 783 784 785 786 787 788 789 790 791 792 793 794 795 796 797 798 799 800 801 802 803 804 805 806 807 808 809 810 811 812 813 814 815 816 817 818 819 820 821 822 823 824 825 826 827 828 829 830 831 832 833 834 835 836 837 838 839 840 841 842 843 844 845 846 847 848 849 850 851 852 853 854 855 856 857 858 859 860 861 862 863 864 865 866 867 868 869 870 871 872 873 874 875 876 877 878 879 880 881 882 883 884 885 886 887 888 889 890 891 892 893 894 895 896 897 898 899 900 901 902 903 904 905 906 907 908 909 910 911 912 913 914 915 916 917 918 919 920 921 922 923 924 925 926 927 928 929 930 931 932 933 934 935 936 937 938 939 940 941 942 943 944 945 946 947 948 949 950 951 952 953 954 955 956 957 958 959 960 961 962 963 964 965 966 967 968 969 970 971 972 973 974 975 976 977 978 979 980 981 982 983 984 985 986 987 988 989 990 991 992 993 994 995 996 997 998 999 1000

1. The **Customers** listing page will open.
2. You can use the **Page Reference field** ,
3. the **Filter Row** or the
4. **Filter Text Box** to search for your customer.
5. Click on the selected customer icon in the **View** column.



CRM Example Company Abigail Milne

**Customers**

Type Customer name search filter here...

View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
?	Hope Works	HOP001	Duncan McCreddie	098 765 432	d.mccreddie@noem	91%	Active	Platinum	Yes	Yes
?	IT Supplies	ITS0001				8%	Active		No	No
?	Joes Carpentry Shop	JOE0001	Mary Watson	031 123 456		50%	New - CRM	Gold	No	Yes
?	Judes Jewels	JUD0001				8%	New - CRM	Silver	No	No
?	Just In Time	JUS001				16%	Active		Yes	No
?	King Copiers	KIN0001	Jason King	0210134508		58%	Released	Bronze	No	Yes
?	King Enterprises	KIN0002	Lucy Rowe			50%	Active	Silver	No	Yes
?	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	Active	Silver	No	Yes
?	Little Bee Honey	LIT0001	John Ginseng	031 123 456		66%	Active	Silver	No	Yes
?	Lovely Test Customer	LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes

Page 4 of 8 (74 items) [1] [2] [3] [4] [5] [6] [7] [8] [9] [10] [All]

Page size: 10

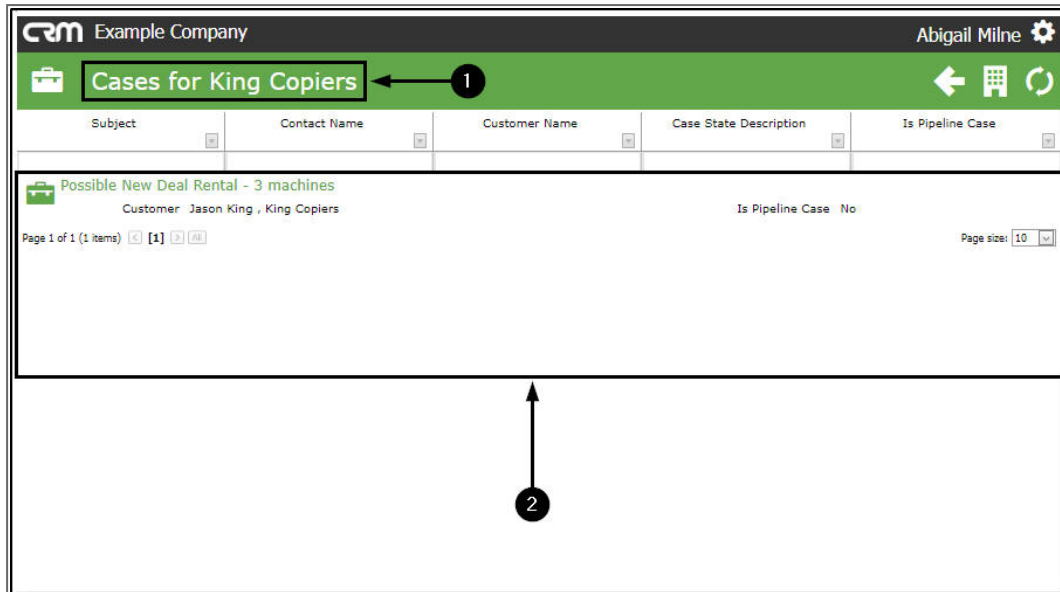
1. The selected **Customer Homepage** will open.
2. Click on the **Cases** tile.



1. The **Cases for [selected customer]** page will open.
2. A list of Cases pertaining to that customer will display (where you have Cases pending).

In this example, there is only **1** Case linked to this customer.

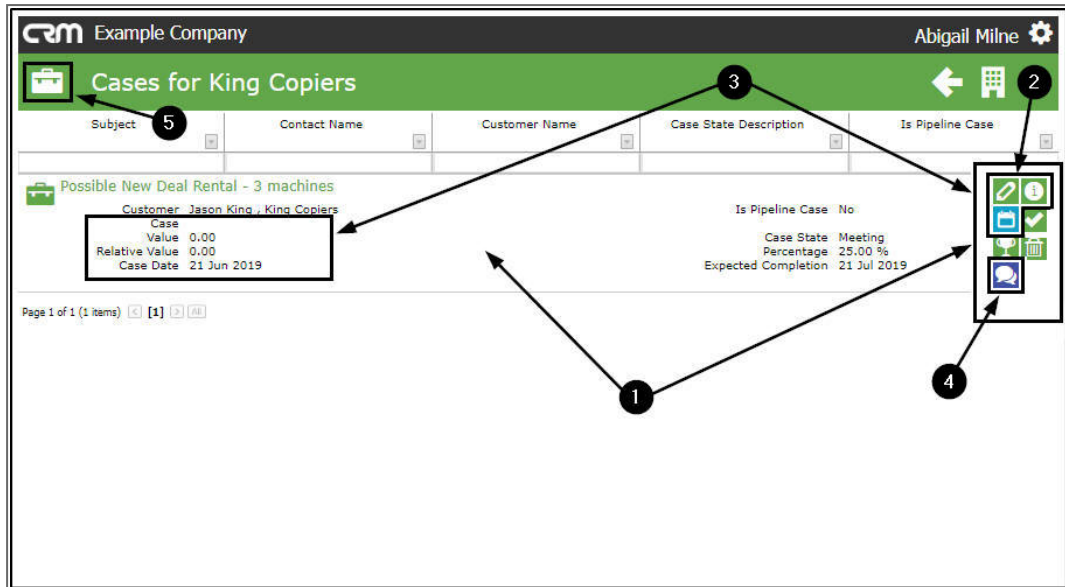




1. Hover anywhere over an open Case, where you are the Salesman, to reveal the Case **Action** buttons.
2. You can link a Quote in this page via the following Action buttons:
  - **View Case Info and History**
  - **View/Edit this Case**
  - **New Activity**
3. **Single click** on any Case (open or closed) to access a **summary** of the Case information and if it is an open Case, the **Action** buttons will also display. (The Action buttons will not display for Closed Cases.)
4. You will note that there is a **New Quote** Action button in this page (not available in the **My Cases** listing page).
  - This will navigate you to the Save Quote screen - where you can also **add a new Quote** for this customer, if required.

For more information refer to [CRM Customers: Cases](#).

5. Click on the **Case** icon to return to the **Homepage**.



CRM.000.012