CRM BASICS

CONTRACTS

A **Contracts** tile has been added to the CRM Homepage. This button will navigate to the **Contracts listing** page which will display all contracts for the user's customers, irrespective of the contract salesman.

This is useful from a salesman's point of view:

- to show active contracts to encourage the salesman to maintain good relationship with the customers linked to those contracts.
- to alert the salesman to any expiring contracts so that he can pay particular attention to the customers that are coming to the end of their contract to try to make sure that those contracts are renewed.

Selecting a Customer Name, Code or Contract No. in this Contracts listing page will direct the salesman to the Contract Performance Report.

Ribbon Access: *Webpage > http://[servername]:[port-no]/BPOCRM/User.aspx*

VIEW CONTRACTS LISTING PAGE

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

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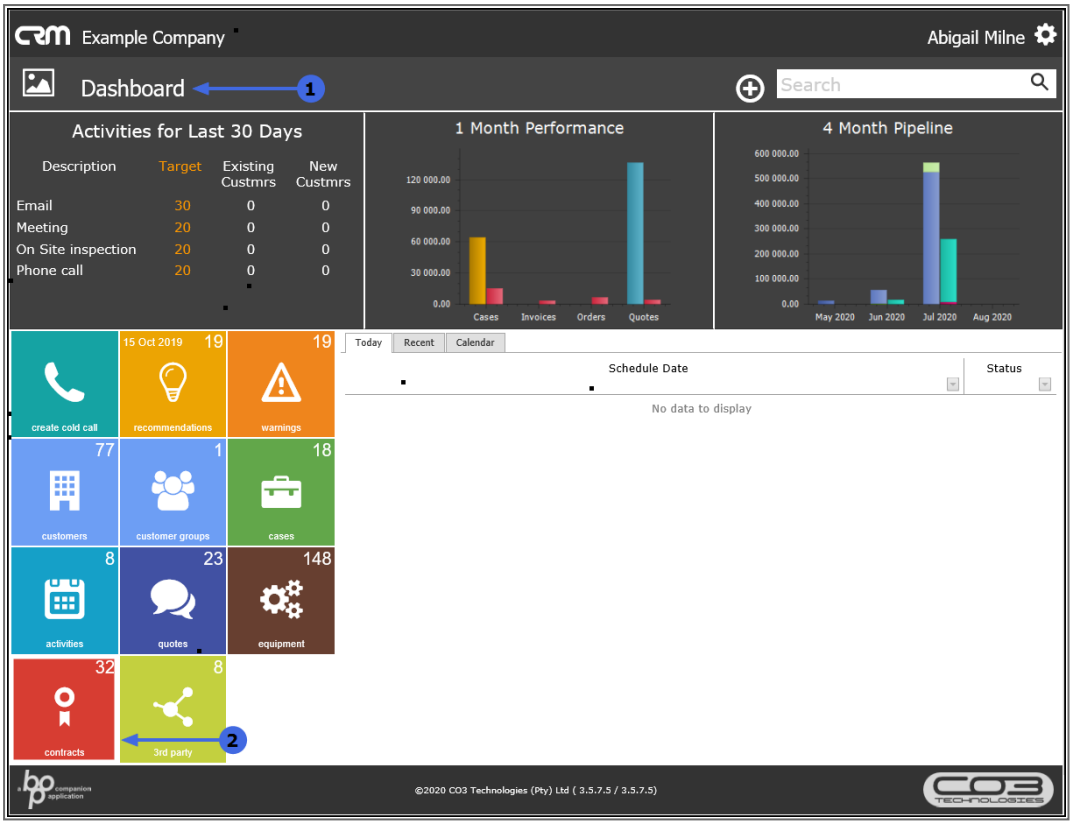

1. The ***Contracts for [Salesman's Name] Customers*** listing page will be displayed.
2. Here you can view all the contracts for all the user's customers, irrespective of the contract salesman.

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Contract No	Customer Code	Customer Name	Salesman Name	Start Date	Expiry Date	Months Remaining
CO0000009	DER001	Derton Technologies	Chris Haynes	07 May 2014	07 May 2019	-12
CO0000012	TIA001	Titan Group	Belinda Sharman	16 May 2014	16 Jun 2014	-71
CO0000016	TIA001	Titan Group	Belinda Sharman	13 Jun 2014	13 Jun 2019	-11
CO0000018	SAM001	Samanthas Diner	Belinda Sharman	09 Jul 2014	09 Jul 2019	-10
CO0000019	OFF001	Office Supplies Unlimited	Belinda Sharman	28 Jul 2014	28 Jul 2019	-10
CO0000020	HOP001	Hope Works	Chris Haynes	01 Jan 2011	01 Jan 2016	-52
CO0000022	SAM001	Samanthas Diner	Bianca Du Toit	05 Aug 2014	05 Aug 2019	-9
CO0000028	HAC001	Hack PC - IT Shop	Bianca Du Toit	29 Jun 2015	29 Jun 2020	1
CO0000031	YES001	Young Electric	Bianca Du Toit	24 Mar 2016	24 Mar 2021	10
CO0000038	SAM001	Samanthas Diner	Belinda Sharman	23 Jun 2016	23 Jun 2021	13

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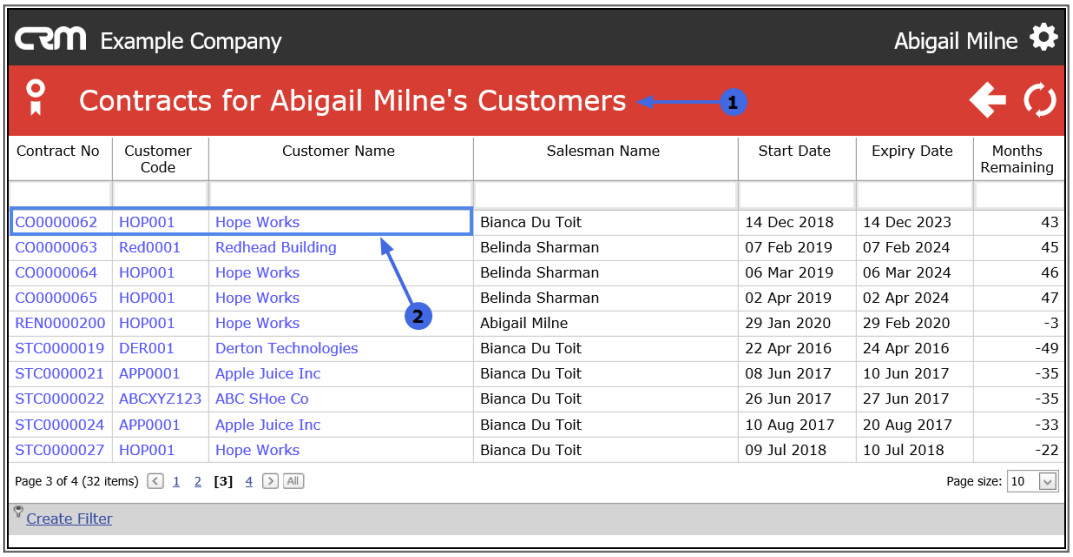
Create Filter

VIEW CONTRACT PERFORMANCE REPORT

1. In the ***Contracts for [Salesman's Name]Customers*** listing page,
2. Click on either the ***Customer Name***, ***Customer Code*** or ***Contact No.*** in the row of the Contract that you wish to view.



Contract No	Customer Code	Customer Name	Salesman Name	Start Date	Expiry Date	Months Remaining
CO0000062	HOP001	Hope Works	Bianca Du Toit	14 Dec 2018	14 Dec 2023	43
CO0000063	Red0001	Redhead Building	Belinda Sharman	07 Feb 2019	07 Feb 2024	45
CO0000064	HOP001	Hope Works	Belinda Sharman	06 Mar 2019	06 Mar 2024	46
CO0000065	HOP001	Hope Works	Belinda Sharman	02 Apr 2019	02 Apr 2024	47
REN0000200	HOP001	Hope Works	Abigail Milne	29 Jan 2020	29 Feb 2020	-3
STC0000019	DER001	Derton Technologies	Bianca Du Toit	22 Apr 2016	24 Apr 2016	-49
STC0000021	APP0001	Apple Juice Inc	Bianca Du Toit	08 Jun 2017	10 Jun 2017	-35
STC0000022	ABCXYZ123	ABC SHoe Co	Bianca Du Toit	26 Jun 2017	27 Jun 2017	-35
STC0000024	APP0001	Apple Juice Inc	Bianca Du Toit	10 Aug 2017	20 Aug 2017	-33
STC0000027	HOP001	Hope Works	Bianca Du Toit	09 Jul 2018	10 Jul 2018	-22

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Create Filter

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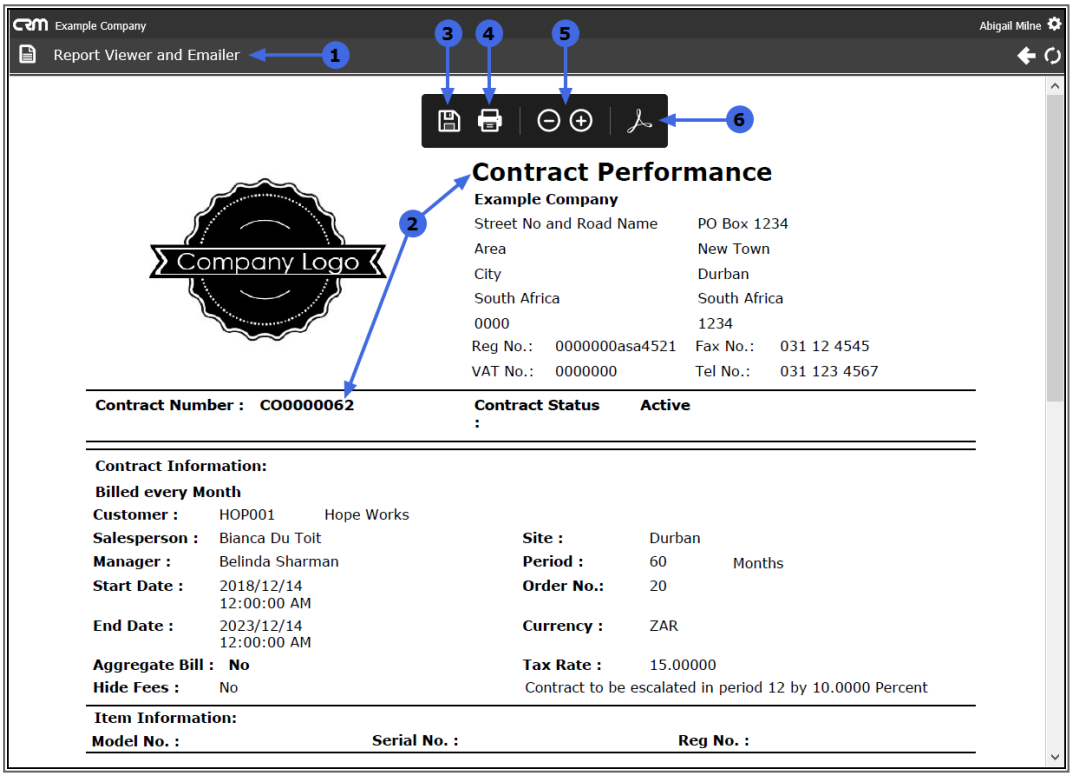
1. The ***Report Viewer and Emailer*** page will open.
2. Here you can view the ***Contract Performance Report*** for the selected contract.

The Following functionality applies in this report page:

3. **Save**: Save a Copy of the report.
4. **Print**: Print a copy of the report.
5. **Zoom** in and out of the report.
6. **Adobe**: Show Adobe Acrobat Reader toolbar. Click on this button.



1. The ***Adobe Acrobat Reader toolbar*** will be displayed. Apply the toolbar functionality if and as required.
2. Click on ***Back*** to return to the Contracts listing page or the ***CRM Home*** button to return to the Homepage.

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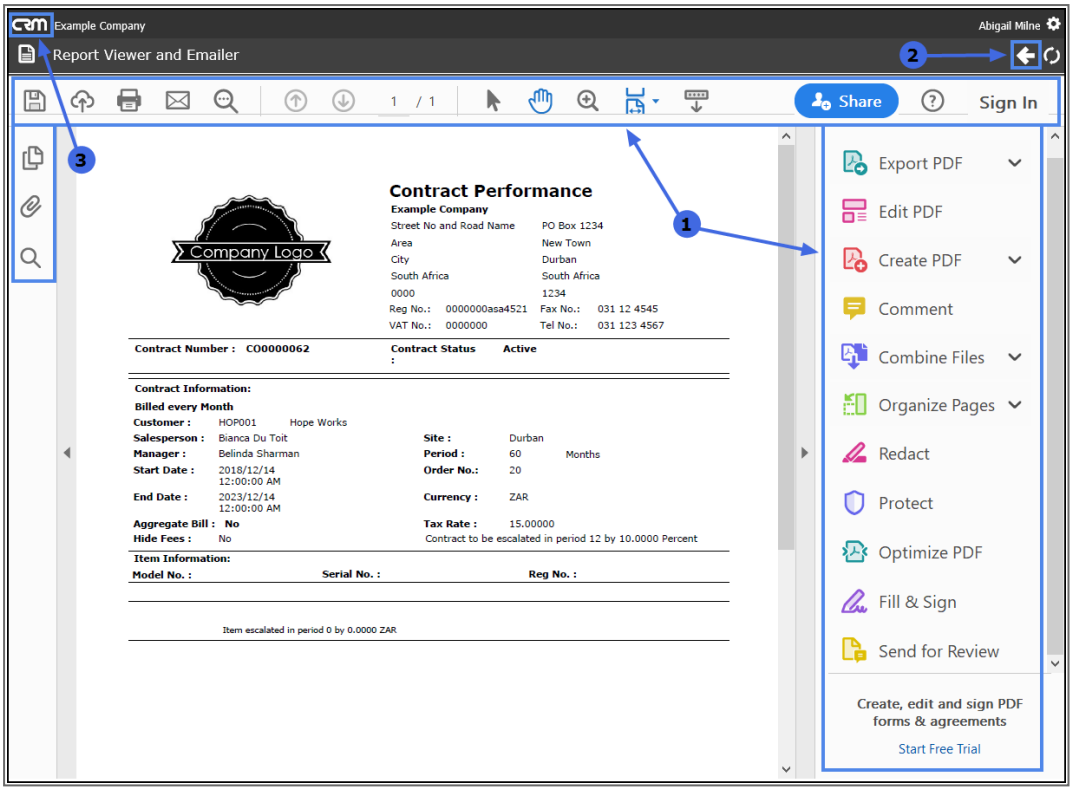

CRM.000.024

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