

CRM BASICS

THIRD PARTY

Third Party contains information relating to a customer's current (or expired) contract with a third party provider.

This is helpful for the various reasons including the following:

- To know when to contact your client as their third party contract ends / is due to end.
- To know what your client's current **Item(s)** and **Item(s) Usage** charges are, so that when you create a proposal or quote - you can ensure that it is competitive.

In **CRM**, you can access current Third Party information for a customer in **2** different pages:

1. From the CRM **Homepage**. This will direct you to the ***Third Party for [Salesman's Name] Customers*** page:
 - This will list all the salesman's customers that are linked to Third Party contracts.
2. From the **Customer Homepage**. This will direct you to the ***Third Party for [Customer Name]*** page:
 - This will list all the Third Party contracts linked to the selected customer.

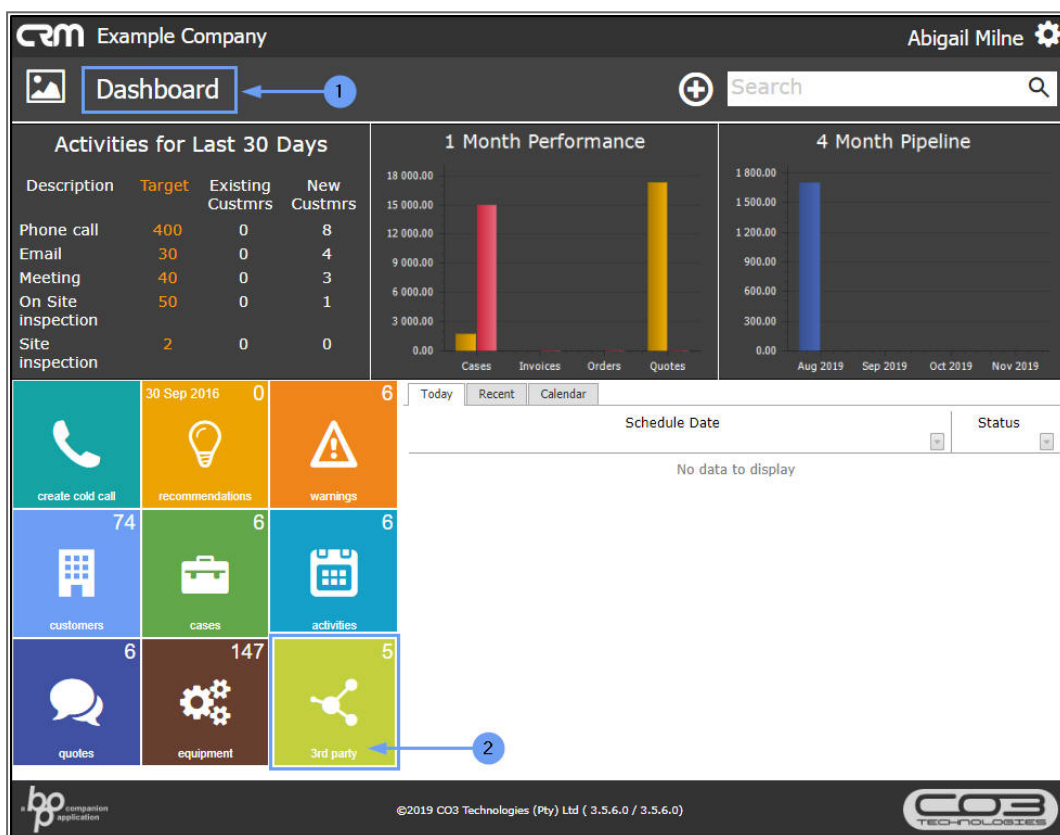
To [Add a new Third Party to a Customer](#), it is quickest to navigate from the Customers (listing) page.

In this manual we will cover the **1st** process; accessing Third Party information from the CRM **Homepage**.

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

THIRD PARTY HOMEPAGE TILE

1. In the CRM *Homepage*,
2. Click on the **3rd Party** tile.
 - You will note a **number** in the top right corner of this tile - this indicates the **total amount** of Third Party Contracts linked to the salesman's customers.



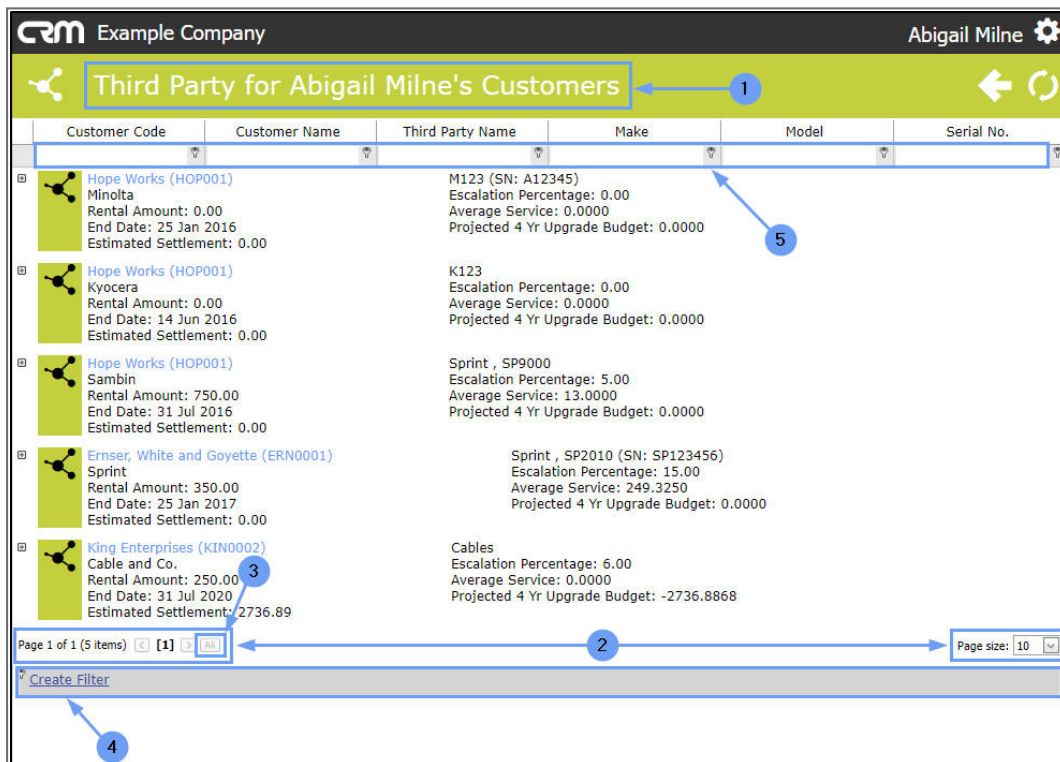
THIRD PARTY FOR [SALESMAN'S NAME] PAGE

1. The **Third Party for [Salesman's Name] Customers** page will open.

Here you can view a list of all the salesman's customers linked to third party contracts with a summary of each contract.

For more information on the features and functions in this page, click on the following links:

2. The [Page Reference and Page Size](#) fields
3. The [All](#) Button
4. The [Create Filter](#) row
 - The [Filter Builder](#) screen
 - [Clear the Filter](#) (but keep the filter sequence reference)
 - [Clear the Filter Sequences](#)
5. The [Filter Text Box](#)
 - [Clear the Filter Text Box](#)



The screenshot shows a web application interface for 'Example Company' with the user 'Abigail Milne'. The main heading is 'Third Party for Abigail Milne's Customers'. Below this is a table with columns: Customer Code, Customer Name, Third Party Name, Make, Model, and Serial No. The table contains five rows of data, each with a green icon and a summary of contract details. At the bottom, there is a pagination bar showing 'Page 1 of 1 (5 items)' and a 'Page size' dropdown set to '10'. A 'Create Filter' button is located at the bottom left. Numbered callouts point to specific features: 1 points to the main heading, 2 points to the pagination bar, 3 points to the 'Create Filter' button, 4 points to the 'Create Filter' button, and 5 points to the 'Serial No.' column header.

Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
Hope Works (HOP001)	Minolta	M123 (SN: A12345)			
	Rental Amount: 0.00	Escalation Percentage: 0.00			
	End Date: 25 Jan 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Kyocera	K123			
	Rental Amount: 0.00	Escalation Percentage: 0.00			
	End Date: 14 Jun 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Sambin	Sprint , SP9000			
	Rental Amount: 750.00	Escalation Percentage: 5.00			
	End Date: 31 Jul 2016	Average Service: 13.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Ernsner, White and Goyette (ERN0001)	Sprint	Sprint , SP2010 (SN: SP123456)			
	Rental Amount: 350.00	Escalation Percentage: 15.00			
	End Date: 25 Jan 2017	Average Service: 249.3250			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
King Enterprises (KIN0002)	Cable and Co.	Cables			
	Rental Amount: 250.00	Escalation Percentage: 6.00			
	End Date: 31 Jul 2020	Average Service: 0.0000			
	Estimated Settlement: 2736.89	Projected 4 Yr Upgrade Budget: -2736.8868			

Page 1 of 1 (5 items) [1] Page size: 10

Create Filter

QUICK VIEW THIRD PARTY 'MAIN' INFORMATION SUMMARY

1. In the *Third Party for*[Salesman's Name]*Customers* page,
2. You can view a summary of the Third Party *main information*.

QUICK VIEW THIRD PARTY 'ITEM' INFORMATION SUMMARY

3. Click on the **expand** icon in front of the Third Party that you wish to view the Item information of.

CRM Example Company Abigail Milne

Third Party for Abigail Milne's Customers

Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
Hope Works (HOP001)	Minolta	M123 (SN: A12345)			
		Escalation Percentage: 0.00			
		Rental Amount: 0.00			
		Average Service: 0.0000			
		End Date: 25 Jan 2016			
		Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Kyocera	K123			
		Escalation Percentage: 0.00			
		Rental Amount: 0.00			
		Average Service: 0.0000			
		End Date: 14 Jun 2016			
		Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Sambin	Sprint , SP9000			
		Escalation Percentage: 5.00			
		Rental Amount: 750.00			
		Average Service: 13.0000			
		End Date: 31 Jul 2016			
		Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Sambin	Kyocera (SN: 99991111)			
		Escalation Percentage: 0.00			
		Rental Amount: 850.00			
		Average Service: 0.0000			
		End Date: 31 Jul 2016			
		Projected 4 Yr Upgrade Budget: 0.0000			
Ernsner, White and Goyette (ERN0001)	Sprint	Sprint , SP2010 (SN: SP123456)			
		Escalation Percentage: 15.00			
		Rental Amount: 350.00			
		Average Service: 249.3250			
		End Date: 25 Jan 2017			
		Projected 4 Yr Upgrade Budget: 0.0000			

Page 1 of 1 (5 items) [1] Page size: 10

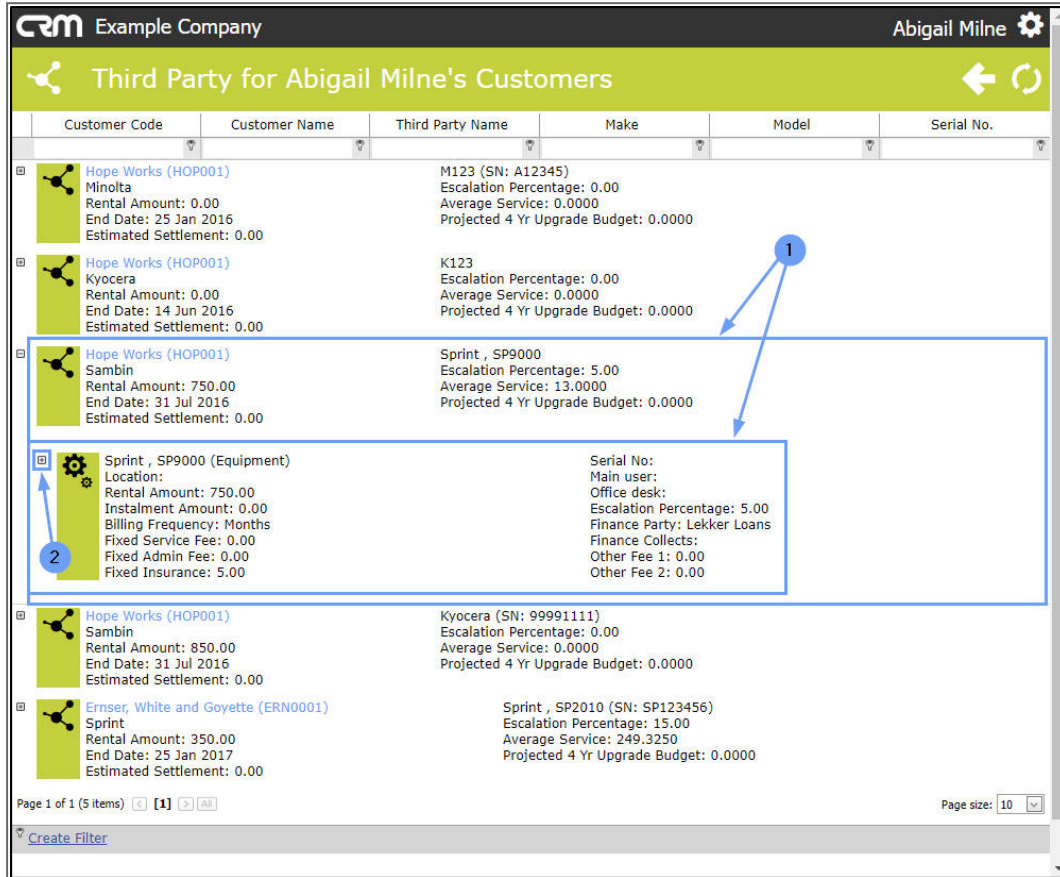
Create Filter

1. The selected Third Party frame will expand to reveal a summary of the Third Party *Item*.

This *Item* section allows you to save information regarding the equipment item itself.

QUICK VIEW THIRD PARTY 'ITEM USAGE TYPE' INFORMATION SUMMARY

- Click on the **expand** icon in front of the **Item** frame.



CRM Example Company Abigail Milne

Third Party for Abigail Milne's Customers

Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
Hope Works (HOP001)	Minolta	M123 (SN: A12345)			Escalation Percentage: 0.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: 0.0000
Hope Works (HOP001)	Kyocera	K123			Escalation Percentage: 0.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: 0.0000
Hope Works (HOP001)	Sambin	Sprint, SP9000			Escalation Percentage: 5.00 Average Service: 13.0000 Projected 4 Yr Upgrade Budget: 0.0000
Sprint, SP9000 (Equipment)					Serial No: Location: Main user: Office desk: Escalation Percentage: 5.00 Finance Party: Lekker Loans Finance Collects: Other Fee 1: 0.00 Other Fee 2: 0.00
Hope Works (HOP001)	Sambin	Kyocera (SN: 99991111)			Escalation Percentage: 0.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: 0.0000
Ermsen, White and Goyette (ERN0001)	Sprint	Sprint, SP2010 (SN: SP123456)			Escalation Percentage: 15.00 Average Service: 249.3250 Projected 4 Yr Upgrade Budget: 0.0000

Page 1 of 1 (5 items) [1] Page size: 10


Create Filter

- The Item frame will expand to reveal the Item **Usage Type** frame with a summary of the usage information.


This frame allows you to add details for the minimum and maximum billing and the cost per copy charges, if applicable.

- You can now view a summary of each tier of the Third Party:

- Contract summary
- Item Summary
- Item **Usage Type** summary



Third Party for Abigail Milne's Customers



Hope Works (HOP001)

Sambin

Rental Amount: 750.00

End Date: 31 Jul 2016


Estimated Settlement: 0.00

Sprint , SP9000

Escalation Percentage: 5.00

Average Service: 13.0000

Projected 4 Yr Upgrade Budget: 0.0000



Sprint , SP9000 (Equipment)

Location:

Rental Amount: 750.00

Instalment Amount: 0.00

Billing Frequency: Months

Fixed Service Fee: 0.00

Fixed Admin Fee: 0.00

Fixed Insurance: 5.00

Serial No:

Main user:

Office desk:

Escalation Percentage: 5.00


Finance Party: Lekker Loans

Finance Collects:

Other Fee 1: 0.00

Other Fee 2: 0.00

Usage Type



Usage type: Mono meter

Min Billing: 0.00

Free Usage Qty: 0.00

Avg Qty: 2500.00


Per Unit Charge: 0.52

Tier1 Unit Charge: 0.60

Tier1 Usage Limit: 0.70

Tier2 Unit Charge: 0.80

Tier2 Usage Limit: 0.00



Hope Works (HOP001)

Sambin

Rental Amount: 850.00

End Date: 31 Jul 2016


Estimated Settlement: 0.00

Kyocera (SN: 99991111)

Escalation Percentage: 0.00

Average Service: 0.0000

Projected 4 Yr Upgrade Budget: 0.0000



Ernser, White and Goyette (ERN0001)

Sprint

Rental Amount: 350.00

End Date: 25 Jan 2017

Estimated Settlement: 0.00

Sprint , SP2010 (SN: SP123456)

Escalation Percentage: 15.00

Average Service: 249.3250

Projected 4 Yr Upgrade Budget: 0.0000

Page 1 of 1 (5 items)

1

2

3

4

5


Page size: 10

Create Filter

VIEW / EDIT AND DELETE ACTION BUTTONS

- You can hover over any of these 3 frames to display the **Action** buttons:

- View/Edit
- Delete



Hope Works (HOP001)

Sambin

Rental Amount: 750.00

End Date: 31 Jul 2016


Estimated Settlement: 0.00


Sprint , SP9000

Escalation Percentage: 5.00

Average Service: 13.0000

Projected 4 Yr Upgrade Budget: 0.0000





Sprint , SP9000 (Equipment)

Location:

Rental Amount: 750.00

Instalment Amount: 0.00

Billing Frequency: Months

Fixed Service Fee: 0.00

Fixed Admin Fee: 0.00

Fixed Insurance: 5.00

Serial No:

Main user:

Office desk:


Escalation Percentage: 5.00


Finance Party: Lekker Loans



Finance Collects:

Other Fee 1: 0.00

Other Fee 2: 0.00



Usage Type	
 Usage type: Mono meter Min Billing: 0.00 Free Usage Qty: 0.00 Avg Qty: 2500.00	Per Unit Charge: 0.52 Tier1 Unit Charge: 0.60 Tier1 Usage Limit: 0.70 Tier2 Unit Charge: 0.80 Tier2 Usage Limit: 0.00

VIEW / ADD / EDIT THIRD PARTY 'MAIN' INFORMATION

1. Hover over a Third Party **Main Information** summary to reveal the **Action** buttons:
2. Click on the **View / Edit this Third Party** button.

CRM Example Company

Abigail Milne

Third Party for Abigail Milne's Customers

Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
Hope Works (HOP001)	Minolta	M123 (SN: A12345)			
	Rental Amount: 0.00	Escalation Percentage: 0.00			
	End Date: 25 Jan 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Kyocera	K123			
	Rental Amount: 0.00	Escalation Percentage: 0.00			
	End Date: 14 Jun 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Samblin	Sprint , SP9000			
	Rental Amount: 750.00	Escalation Percentage: 5.00			
	End Date: 31 Jul 2016	Average Service: 13.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Ernsler, White and Goyette (ERN0001)	Sprint	Sprint , SP2010 (SN: SP123456)			
	Rental Amount: 350.00	Escalation Percentage: 15.00			
	End Date: 25 Jan 2017	Average Service: 249.3250			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
King Enterprises (KIN0002)	Cable and Co.	Cables			
	Rental Amount: 250.00	Escalation Percentage: 6.00			
	End Date: 31 Jul 2020	Average Service: 0.0000			
	Estimated Settlement: 2736.89	Projected 4 Yr Upgrade Budget: -2736.8868			

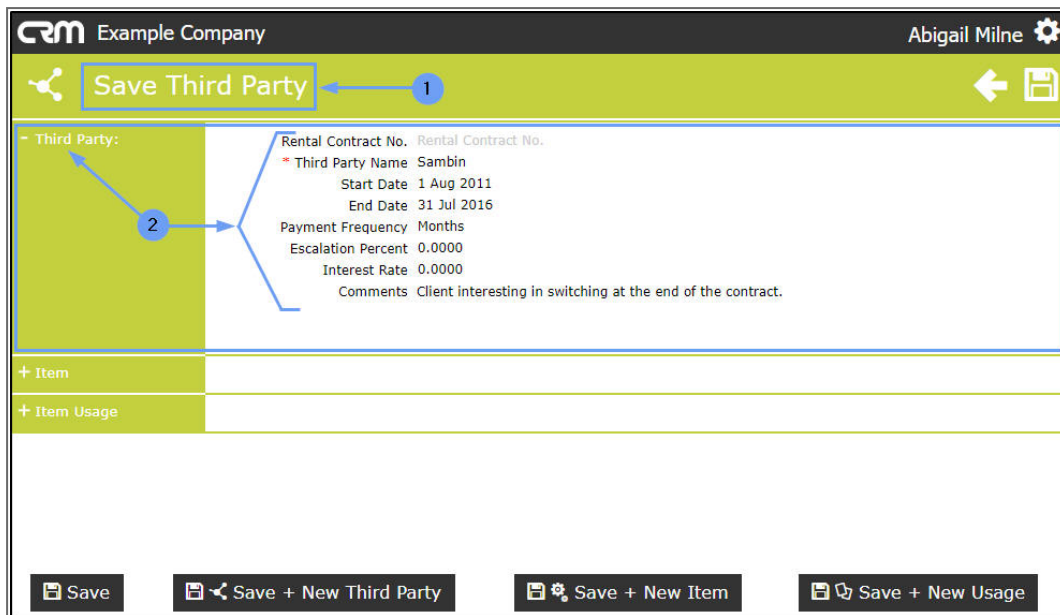
Page 1 of 1 (5 items) [1] [2] [3] [4] [5]

Page size: 10

[Create Filter](#)

- **Rental Contract No:** Type in the rental contract no.
- **Third Party Name:** Type in the Third Party name.
- **Start Date:** Click in this field and either type in the start date or click on the drop-down arrow and use the calendar function to select the date.
- **End Date:** Click in this field and either type in the end date or click on the drop-down arrow and use the calendar function to select the end date.
- **Payment Frequency:** Click in this field and select from the drop-down menu the payment frequency (e.g. *monthly*).
- **Escalation Period:** Click in this field and either type in or use the directional arrows to select the escalation percentage.
- **Interest Rate:** Click in this field and either type in or use the directional arrows to select the interest rate.
- **Comments:** Click in this field and type in a comment relating to this Third Party contract, if required.


Note: You may not have all the Third Party information, but **CRM** provides fields for all relevant contract information. Fields with a red asterisk (*) are mandatory.







1. When you have entered or edited the Third Party detail as required, you have several choices in this page:
2. You can expand the Item section and [view / edit / add](#) any '*Item*' Information, if applicable.
3. You can expand the Item Usage section and [view / edit / add](#) any '*Item Usage*' information, if applicable.

SAVE OPTIONS

4. Or you can select one of the **Save** options,
5. **Save**,
6. **Save + New Third Party**,
7. **Save + New Item**
8. **Save + New Usage**


Example Company

Abigail Milne



Save Third Party



- Third Party:

2

+ Item
+ Item Usage

3

1

Rental Contract No. Rental Contract No.
* Third Party Name Sambin
Start Date 1 Aug 2011
End Date 31 Jul 2016
Payment Frequency Bi-annual
Escalation Percent 5.0000
Interest Rate 0.0000
Comments Client interested in switching at the end

4

Save


Save + New Third Party


Save + New Item




Save + New Usage

SAVE

- If you click on **Save**,


Example Company

Abigail Milne



Save Third Party



- Third Party:

+ Item
+ Item Usage

Rental Contract No. Rental Contract No.
* Third Party Name Sambin
Start Date 1 Aug 2011
End Date 31 Jul 2016
Payment Frequency Bi-annual
Escalation Percent 5.0000
Interest Rate 0.0000
Comments Client interested in switching at the end

Save

Save + New Third Party

Save + New Item

Save + New Usage

- The edited details will be **saved** and you will return to the **Third Party for [Salesman's Name] Customers** page.



Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
Hope Works (HOP001)	Minolta	M123 (SN: A12345)			
	Rental Amount: 0.00	Escalation Percentage: 0.00			
	End Date: 25 Jan 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Kyocera	K123			
	Rental Amount: 0.00	Escalation Percentage: 0.00			
	End Date: 14 Jun 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Samblin	Sprint , SP9000			
	Rental Amount: 750.00	Escalation Percentage: 5.00			
	End Date: 31 Jul 2016	Average Service: 13.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Ernsler, White and Goyette (ERN0001)	Sprint	Sprint , SP2010 (SN: SP123456)			
	Rental Amount: 350.00	Escalation Percentage: 15.00			
	End Date: 25 Jan 2017	Average Service: 249.3250			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
King Enterprises (KIN0002)	Cable and Co.	Cables			
	Rental Amount: 250.00	Escalation Percentage: 6.00			
	End Date: 31 Jul 2020	Average Service: 0.0000			
	Estimated Settlement: 2736.89	Projected 4 Yr Upgrade Budget: -2736.8868			

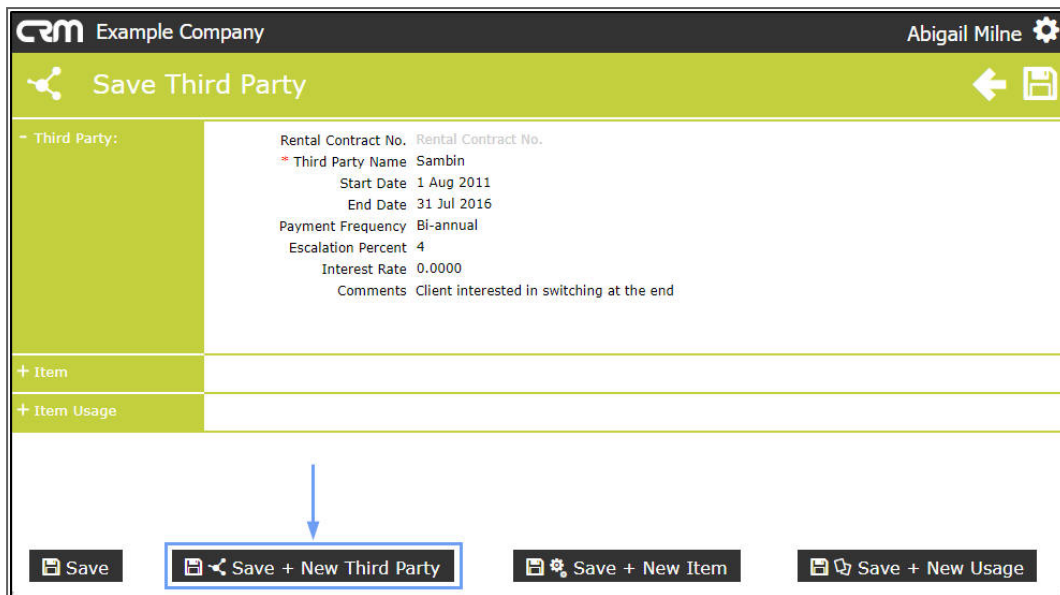
Page 1 of 1 (5 items) [1] [2] [3] [4] [5] [6] [7] [8] [9] [10] Page size: 10

[Create Filter](#)

SAVE + NEW THIRD PARTY

(save all details and add a new Third Party)

- If you click on **Save + New Third Party**,



CRM Example Company Abigail Milne

Save Third Party

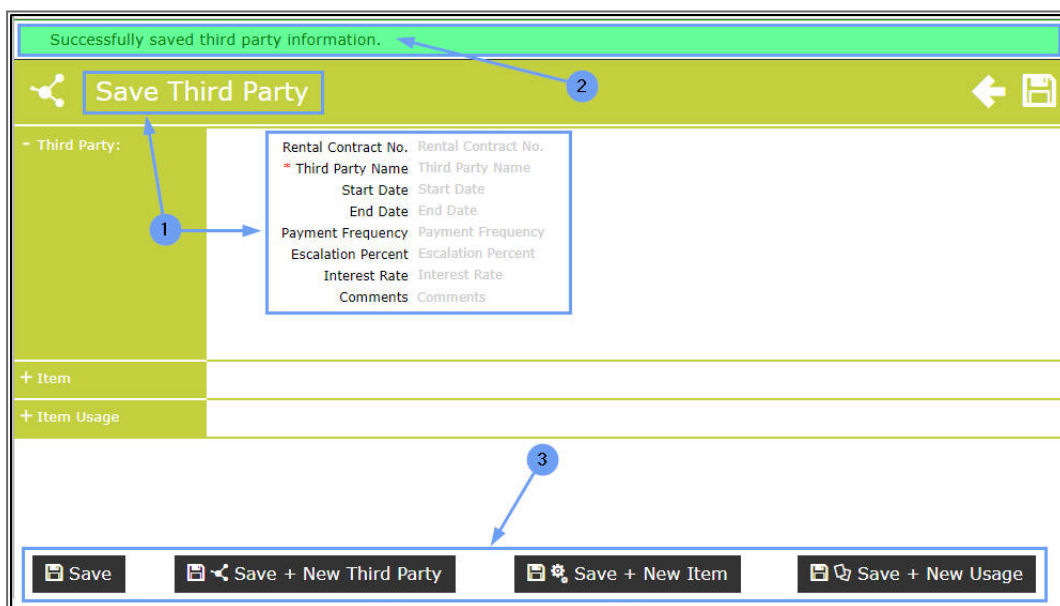
- Third Party:

Rental Contract No. Rental Contract No.
 * Third Party Name Sambin
 Start Date 1 Aug 2011
 End Date 31 Jul 2016
 Payment Frequency Bi-annual
 Escalation Percent 4
 Interest Rate 0.0000
 Comments Client interested in switching at the end

+ Item
 + Item Usage

Save Save + New Third Party Save + New Item Save + New Usage

1. The page will **refresh** and clear the Third Party section details, ready for you to add new Third Party details.
2. A message bar will appear at the top of the page stating;
 - **Successfully saved third party information.**
3. Select the appropriate **Save option** to save your changes.



Successfully saved third party information.

Save Third Party

- Third Party:

Rental Contract No. Rental Contract No.
 * Third Party Name Third Party Name
 Start Date Start Date
 End Date End Date
 Payment Frequency Payment Frequency
 Escalation Percent Escalation Percent
 Interest Rate Interest Rate
 Comments Comments

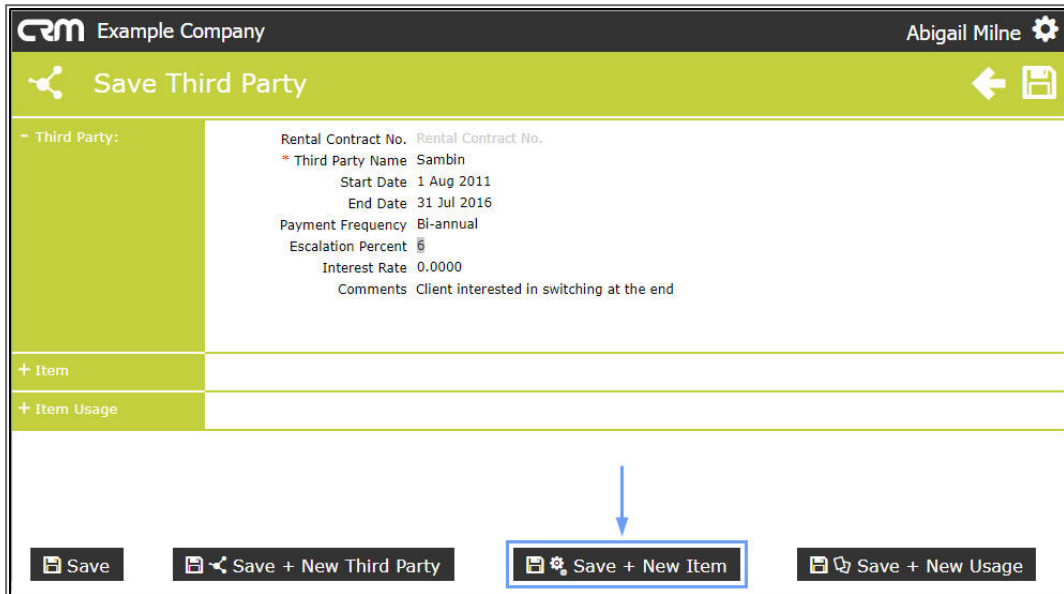
+ Item
 + Item Usage

Save Save + New Third Party Save + New Item Save + New Usage

SAVE + NEW ITEM

(saves all details and adds a new equipment items for the same Third Party)

- If you click on **Save + New Item**,



CRM Example Company Abigail Milne

Save Third Party

- Third Party:

Rental Contract No. Rental Contract No.
 * Third Party Name Sambin
 Start Date 1 Aug 2011
 End Date 31 Jul 2016
 Payment Frequency Bi-annual
 Escalation Percent 6
 Interest Rate 0.0000
 Comments Client interested in switching at the end

+ Item

+ Item Usage

Save Save + New Third Party **Save + New Item** Save + New Usage

1. The page will **refresh** but the Third Party details will remain in this page, ready for you to add a **new item** to this Third Party Item section.
2. A message bar will appear at the top of the page stating;
 - **Successfully saved third party information.**
3. Click on the **expand** icon in front of **Item**.

Successfully saved third party information.

Save Third Party

Third Party:

Rental Contract No. Rental Contract No.
 * Third Party Name Sambin
 Start Date 1 Aug 2011
 End Date 31 Jul 2016
 Payment Frequency Bi-annual
 Escalation Percent 6.0000
 Interest Rate 0.0000
 Comments Client interested in switching at the end

+ Item

+ Item Usage

Save Save + New Third Party Save + New Item Save + New Usage

1. The **Item** section will **expand** and the details will have been cleared, ready for you to add new Item details.
2. When you have added the new Item details, select the appropriate **Save option** to save your changes.

Successfully saved third party information.

Save Third Party

- Third Party:

Rental Contract No. Rental Contract No.
* Third Party Name Sambin
Start Date 1 Aug 2011
End Date 31 Jul 2016
Payment Frequency Bi-annual
Escalation Percent 6.0000
Interest Rate 0.0000
Comments Client interested in switching at the end

+ Item

Item Type Item Type
* Make Make
Model Model
Serial Number Serial number
Location Location
Description Description

Main User Main User
Office Desk No Office Desk No
Rental Amount Rental Amount
Instalment Amount Instalment Amount
Escalation Percentage Escalation Percentage
Billing Frequency Billing Frequency
Finance Party Finance Party
Finance Collects Finance Collects
Fixed Service Fee Fixed Service Fee
Fixed Admin Fee Fixed Admin Fee
Fixed Insurance Fixed Insurance
Other Fee 1 Other Fee 1
Other Fee 2 Other Fee 2

+ Item Usage

Save

Save + New Third Party

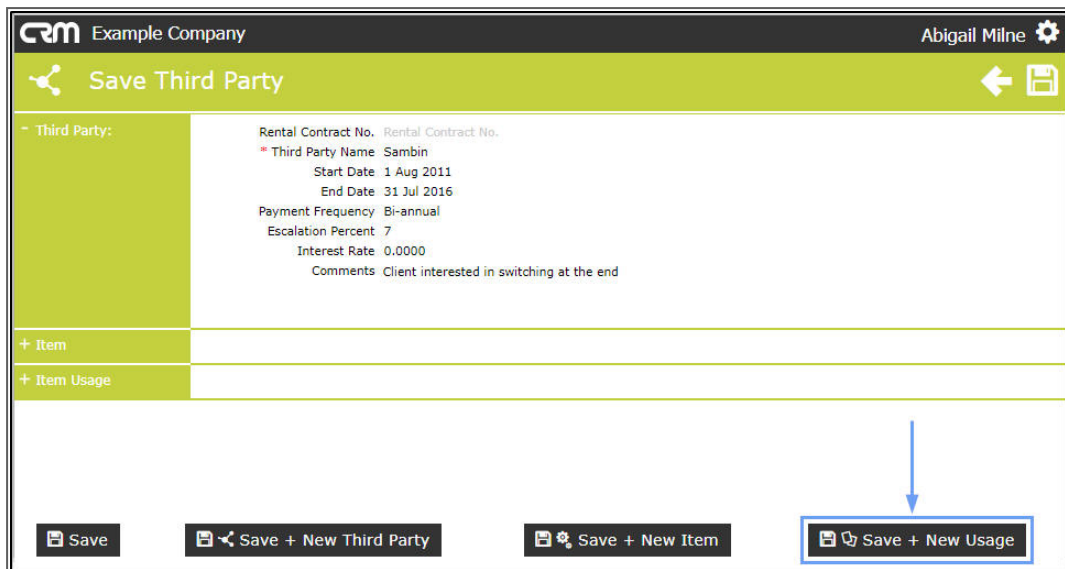
Save + New Item

Save + New Usage

SAVE + NEW USAGE

(saves all details and adds new usage for the same machine)

- If you click on **Save + New Usage**,



CRM Example Company Abigail Milne

Save Third Party

- Third Party:

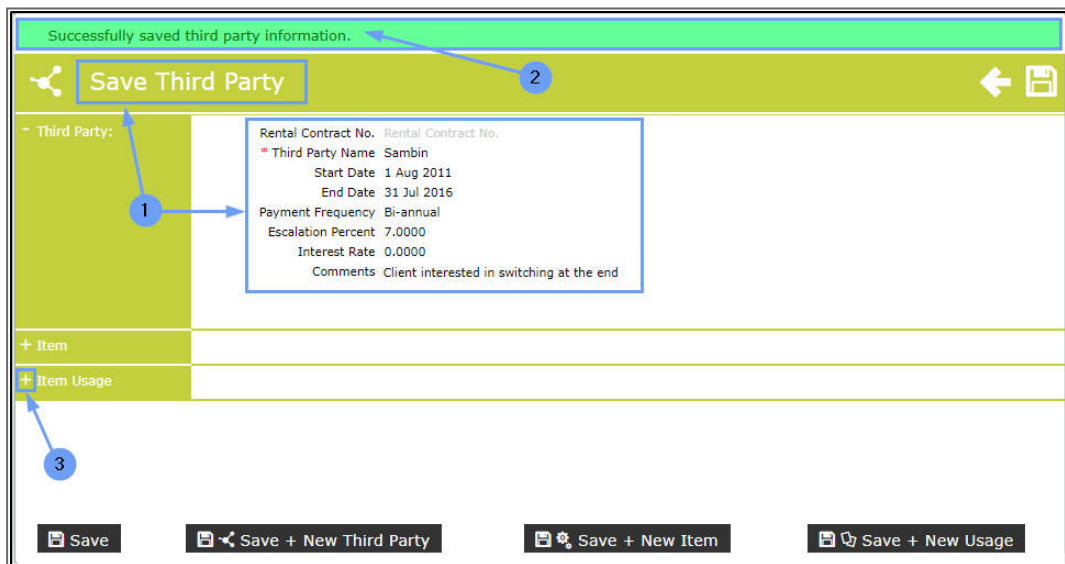
Rental Contract No. Rental Contract No.
 * Third Party Name Sambin
 Start Date 1 Aug 2011
 End Date 31 Jul 2016
 Payment Frequency Bi-annual
 Escalation Percent 7
 Interest Rate 0.0000
 Comments Client interested in switching at the end

+ Item

+ Item Usage

Save Save + New Third Party Save + New Item Save + New Usage

1. The page will **refresh** but the Third Party details will remain in this page, ready for you to add a new item usage for this Third Party to the **Item Usage** section.
2. A message bar will appear at the top of the page stating;
 - **Successfully saved third party information.**
3. Click on the **expand** icon in front of **Item Usage**.



Successfully saved third party information.

Save Third Party

- Third Party:

Rental Contract No. Rental Contract No.
 * Third Party Name Sambin
 Start Date 1 Aug 2011
 End Date 31 Jul 2016
 Payment Frequency Bi-annual
 Escalation Percent 7.0000
 Interest Rate 0.0000
 Comments Client interested in switching at the end

+ Item

+ Item Usage

Save Save + New Third Party Save + New Item Save + New Usage

1. The **Item Usage** section will **expand** and the details will have been cleared, ready for you to add new Item Usage details.
2. When you have added the new Item Usage details, select the appropriate **Save option** to save your changes.

Successfully saved third party information.

Save Third Party

- Third Party:

Rental Contract No. Rental Contract No.
 * Third Party Name: Sambin
 Start Date: 1 Aug 2011
 End Date: 31 Jul 2016
 Payment Frequency: Bi-annual
 Escalation Percent: 7.0000
 Interest Rate: 0.0000
 Comments: Client interested in switching at the end

+ Item

- Item Usage

* Note: Usage information will only be saved if you select a Usage/Meter Type and valid Item information is provided above.

* Usage/Meter Type: Usage/Meter Type
 Minimum Billing: Minimum Billing
 Free Usage Qty: Free Usage Qty
 Average Qty: Average Qty
 Per Unit Charge: Per Unit Charge
 Tier 1 Unit Charge: Tier 1 Unit Charge
 Tier 1 Usage Limit: Tier 1 Usage Limit
 Tier 2 Unit Charge: Tier 2 Unit Charge
 Tier 2 Usage Limit: Tier 2 Usage Limit
 Escalation Percentage: Escalation Percentage
 Billing Frequency: Billing Frequency
 Average 6 Month Spend: Average 6 Month Spend
 Month 1 Spend: Month 1 Spend
 Month 2 Spend: Month 2 Spend
 Month 3 Spend: Month 3 Spend
 Month 4 Spend: Month 4 Spend
 Month 5 Spend: Month 5 Spend
 Month 6 Spend: Month 6 Spend

1 → 2

Save Save + New Third Party Save + New Item Save + New Usage

DELETE THIRD PARTY 'MAIN' INFORMATION

1. In the **Third Party for [Salesman's Name] Customers** page
2. Hover over a selected Third Party summary to reveal the **Action Item** buttons:
3. Click on the **Delete this Third Party** button.

CRM Example Company Abigail Milne

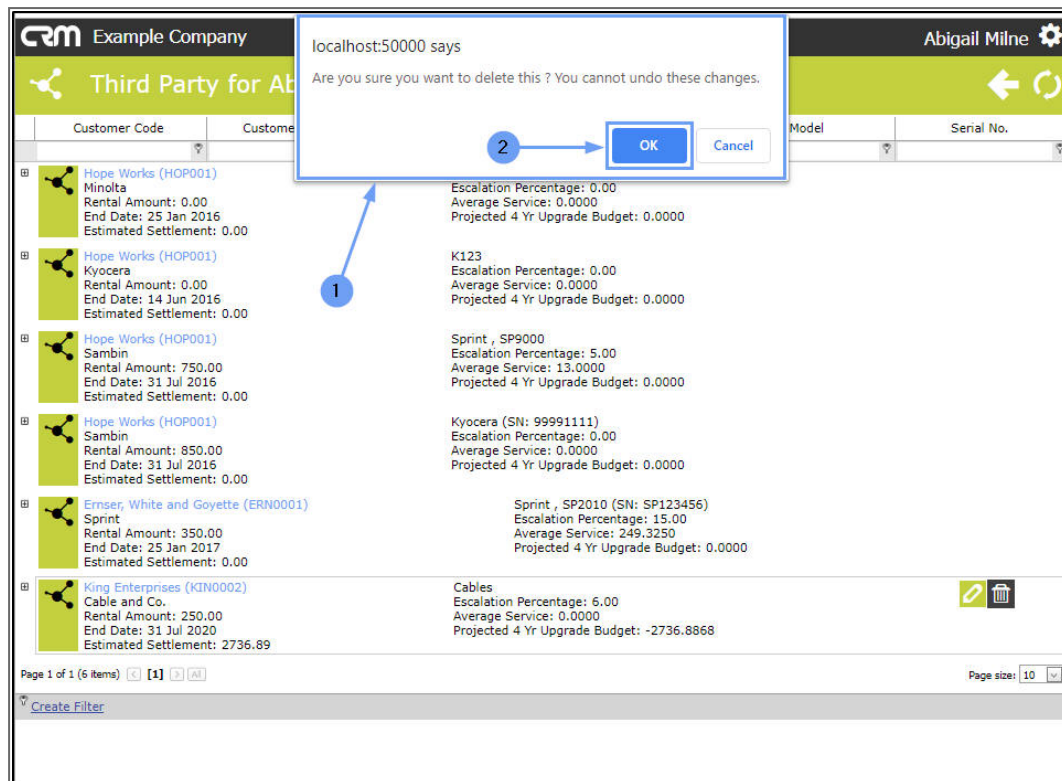
Third Party for Abigail Milne's Customers 1

Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
Hope Works (HOP001)	Minolta	M123 (SN: A12345)	Escalation Percentage: 0.00	Average Service: 0.0000	Projected 4 Yr Upgrade Budget: 0.0000
Hope Works (HOP001)	Kyocera	K123	Escalation Percentage: 0.00	Average Service: 0.0000	Projected 4 Yr Upgrade Budget: 0.0000
Hope Works (HOP001)	Sambin	Sprint, SP9000	Escalation Percentage: 5.00	Average Service: 13.0000	Projected 4 Yr Upgrade Budget: 0.0000
Hope Works (HOP001)	Sambin	Kyocera (SN: 99991111)	Escalation Percentage: 0.00	Average Service: 0.0000	Projected 4 Yr Upgrade Budget: 0.0000
Ermsy, White and Goyette (ERN0001)	Sprint	Sprint, SP2010 (SN: SP123456)	Escalation Percentage: 15.00	Average Service: 249.3250	Projected 4 Yr Upgrade Budget: 0.0000
King Enterprises (KIN0002)	Cable and Co.	Cables	Escalation Percentage: 6.00	Average Service: 0.0000	Projected 4 Yr Upgrade Budget: -2736.8868

Page 1 of 1 (6 items) Page size: 10

[Create Filter](#) 3

1. A message box will pop up asking;
 - ***Are you sure you want to delete this? You cannot undo these changes.***
2. Click on **Ok**.



1. The Third Party will be **removed** from the page.
2. The **Page Reference** field will adjust to account for the deleted Third Party.

Example Company						Abigail Milne
Third Party for Abigail Milne's Customers						
Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.	
Hope Works (HOP001)	Minolta	M123 (SN: A12345)	Escalation Percentage: 0.00	Average Service: 0.0000	Projected 4 Yr Upgrade Budget: 0.0000	
Hope Works (HOP001)	Kyocera	K123	Escalation Percentage: 0.00	Average Service: 0.0000	Projected 4 Yr Upgrade Budget: 0.0000	
Hope Works (HOP001)	Sambin	Sprint, SP9000	Escalation Percentage: 5.00	Average Service: 13.0000	Projected 4 Yr Upgrade Budget: 0.0000	
Hope Works (HOP001)	Sambin	Kyocera (SN: 99991111)	Escalation Percentage: 0.00	Average Service: 0.0000	Projected 4 Yr Upgrade Budget: 0.0000	1
Emser, White and Goyette (ERN0001)	Sprint	Sprint, SP2010 (SN: SP123456)	Escalation Percentage: 15.00	Average Service: 249.3250	Projected 4 Yr Upgrade Budget: 0.0000	

Page 1 of 1 (5 items) [1] [2] [3] [4] [5]

Create Filter

Page size: 10

VIEW / EDIT / ADD THIRD PARTY 'ITEM' INFORMATION

This *Item* section allows you to save information regarding the equipment item itself.

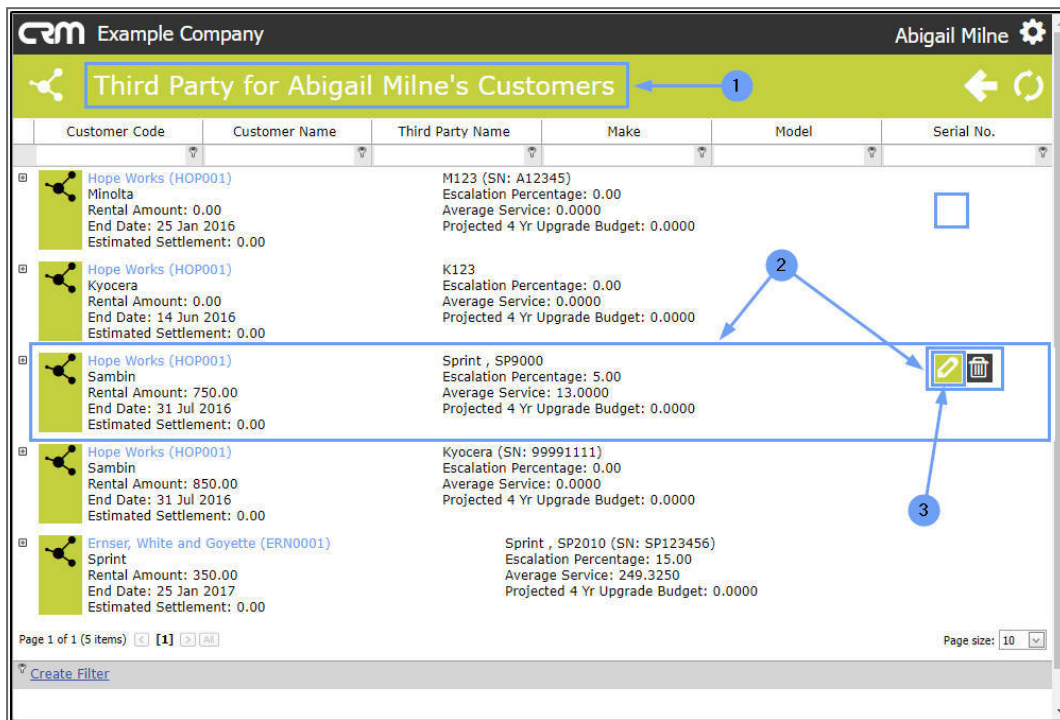
These details are **important** to include, particularly the amounts (e.g. Instalment amount, Service and Admin fees etc.) as you will take all these figures into account (as well as the Item Usage figures) when creating your **proposal** or **quote**. The aim will be to create a better deal for this customer to win their custom.

Note: If you need to add multiple equipment items, you can select **Save + New Item** to add another equipment item.

You can navigate to the (edit) *Item* details frame in 2 ways:

Either

1. In the **Third Party for [Salesman's Name] Customers** page
2. Hover over a Third Party summary to reveal the **Action Item** buttons:
3. Click on the **View / Edit this Third Party** button.



CRM Example Company Abigail Milne


Third Party for Abigail Milne's Customers


Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
Hope Works (HOP001)	Minolta	M123 (SN: A12345)			
	Rental Amount: 0.00	Escalation Percentage: 0.00			
	End Date: 25 Jan 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Kyocera	K123			
	Rental Amount: 0.00	Escalation Percentage: 0.00			
	End Date: 14 Jun 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Sambin	Sprint , SP9000			
	Rental Amount: 750.00	Escalation Percentage: 5.00			
	End Date: 31 Jul 2016	Average Service: 13.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Sambin	Kyocera (SN: 99991111)			
	Rental Amount: 850.00	Escalation Percentage: 0.00			
	End Date: 31 Jul 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Ernser, White and Goyette (ERN0001)	Sprint	Sprint , SP2010 (SN: SP123456)			
	Rental Amount: 350.00	Escalation Percentage: 15.00			
	End Date: 25 Jan 2017	Average Service: 249.3250			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			


Page 1 of 1 (5 items) [1] Page size: 10

Create Filter

1. The **Save Third Party** page will open.
2. Click on the expand icon in front of **Item**.




Example Company

Abigail Milne




Save Third Party

1

- Third Party:

2

+ Item
+ Item Usage

Rental Contract No. Rental Contract No.

* Third Party Name Sambin

Start Date 1 Aug 2011


End Date 31 Jul 2016


Payment Frequency BI-annual


Escalation Percent 7.0000


Interest Rate 0.0000

Comments Client interested in switching at the end

 Save

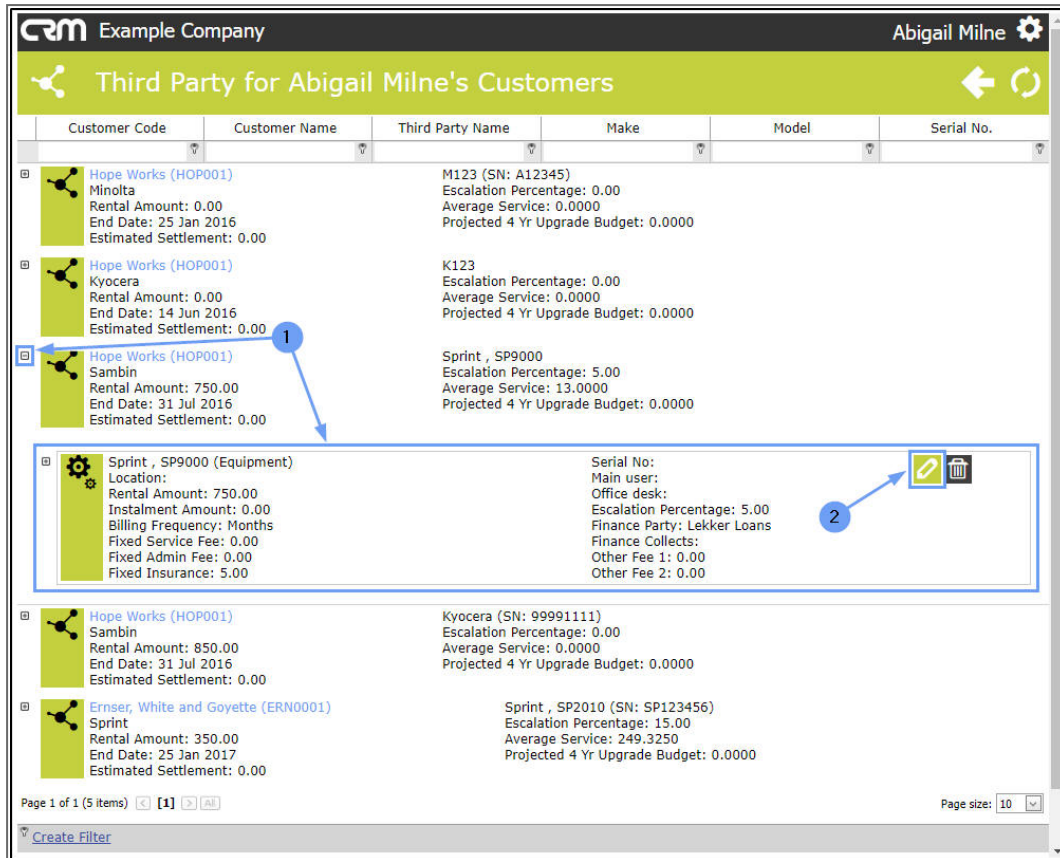
 Save + New Third Party

 Save + New Item

 Save + New Usage

Or

1. In the **Third Party for [Salesman's Name] Customers** page
2. Expand the selected Third Party summary to reveal the **Item** summary.
3. Hover over the Item summary to reveal the Action buttons and click on the **View / Edit this Third Party** button.



CRM Example Company Abigail Milne

Third Party for Abigail Milne's Customers

Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
Hope Works (HOP001)	Minolta	M123 (SN: A12345)			
	Rental Amount: 0.00	Escalation Percentage: 0.00			
	End Date: 25 Jan 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Kyocera	K123			
	Rental Amount: 0.00	Escalation Percentage: 0.00			
	End Date: 14 Jun 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Sambin	Sprint, SP9000			
	Rental Amount: 750.00	Escalation Percentage: 5.00			
	End Date: 31 Jul 2016	Average Service: 13.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Sprint, SP9000 (Equipment)	Location:	Serial No:			
	Rental Amount: 750.00	Main user:			
	Instalment Amount: 0.00	Office desk:			
	Billing Frequency: Months	Escalation Percentage: 5.00			
	Fixed Service Fee: 0.00	Finance Party: Lekker Loans			
	Fixed Admin Fee: 0.00	Finance Collects:			
	Fixed Insurance: 5.00	Other Fee 1: 0.00			
		Other Fee 2: 0.00			
Hope Works (HOP001)	Sambin	Kyocera (SN: 99991111)			
	Rental Amount: 850.00	Escalation Percentage: 0.00			
	End Date: 31 Jul 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Ernsner, White and Goyette (ERN0001)	Sprint	Sprint, SP2010 (SN: SP123456)			
	Rental Amount: 350.00	Escalation Percentage: 15.00			
	End Date: 25 Jan 2017	Average Service: 249.3250			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			


Page 1 of 1 (5 items) [1] Page size: 10


Create Filter




1. The **Save Third Party** page will open.
2. The **Item** frame will be auto-expanded ready for you to make changes.
3. **Add** or **Edit** the Item information as required:

- **Item Type:** Select from the drop-down menu the type e.g. Toners, Spares, Accessories.
- **Make:** Select from the drop-down menu the make e.g. Kyocera
- **Model:** Type in the Model No. of the item.
- **Serial Number:** Type in the Serial No. of the item.
- **Location:** Type in the location of the item.
- **Description:** Type in a brief description of the item.

- **Main User:** Type in the name of the user who mainly uses this item, if applicable.
- **Office Desk No:** Type in the office desk number of the user, if applicable.
- **Rental Amount:** Type in or use the directional arrows to select the rental amount.
- **Instalment Amount :** Type in or use the directional arrows to select the instalment amount that is being paid.
- **Escalation Percentage:** Type in or use the directional arrows to select the escalation percentage of this particular item.
- **Billing Frequency:** Select from the drop-down list the billing frequency e.g. months, quarterly.


Example Company

Abigail Milne



Save Third Party



+ Third Party:

- Item

Item Type Equipment

* Make Sprint

Model SP9000

Serial Number Serial number

Location Location

Description Description

Main User Main User

Office Desk No Office Desk No

Rental Amount 750.0000

Instalment Amount 0.0000

Escalation Percentage 5.0000

Billing Frequency Months

Finance Party Lekker Loans

Finance Collects Finance Collects

Fixed Service Fee 0.0000

Fixed Admin Fee 0.0000

Fixed Insurance 5.0000

Other Fee 1 0.0000

Other Fee 2 0.0000

- Item Usage


* Note: Usage information will only be saved if you select a Usage/Meter Type and valid Item information is provided above.


* Usage/Meter Type Usage/Meter Type


Minimum Billing Minimum Billing


Free Usage Qty Free Usage Qty

Average Qty Average Qty

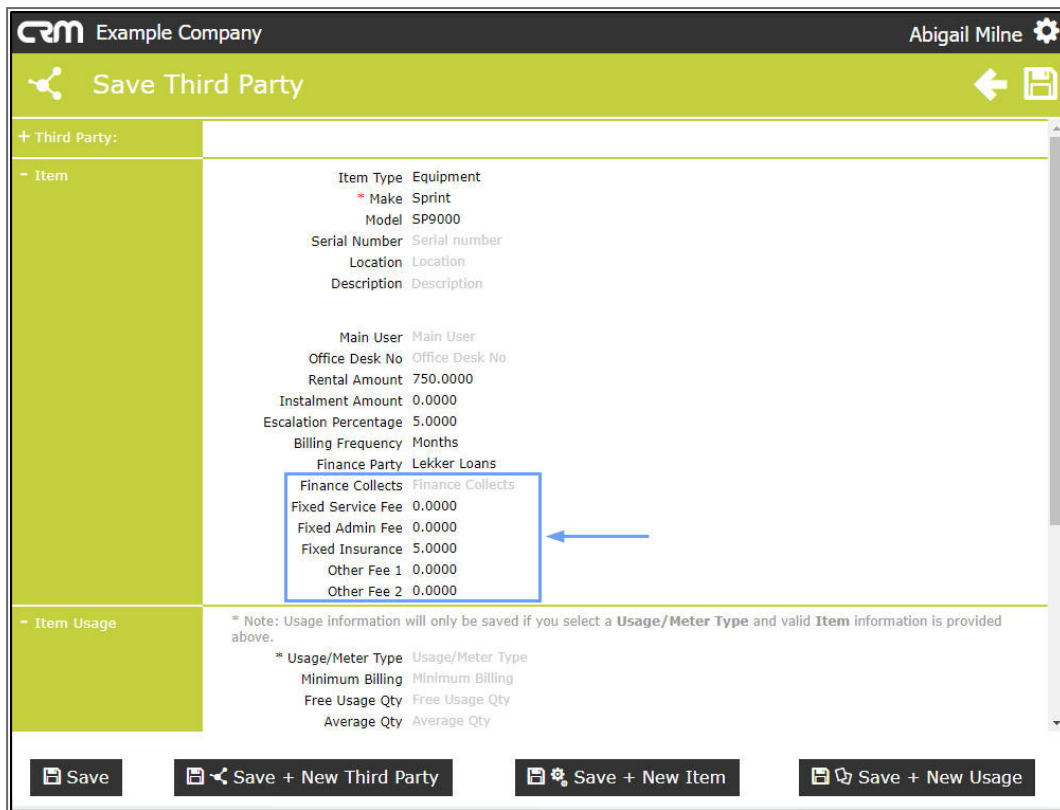
 Save

 Save + New Third Party

 Save + New Item

 Save + New Usage

- **Finance Party:** Type in the Finance Party name.
- **Finance Collects:** Select **Yes** if the Finance Party collects the fee and **No** if not.
- **Fixed Service Fee:** If there is a fixed Service Fee, either type in or use the directional arrows to select this fee amount.
- **Fixed Admin Fee :** If there is a fixed Admin Fee, either type in or use the directional arrows to select this fee amount.
- **Fixed Insurance:** If there is a fixed Service Fee, either type in or use the directional arrows to select this fee amount.
- **Other Fee 1 - 2 :** Use these fields to add any additional fees (not listed here) that may be linked to this third party, if applicable.



CRM Example Company Abigail Milne

Save Third Party

+ Third Party:

- Item

Item Type Equipment
 * Make Sprint
 Model SP9000
 Serial Number Serial number
 Location Location
 Description Description

Main User Main User
 Office Desk No Office Desk No
 Rental Amount 750.0000
 Instalment Amount 0.0000
 Escalation Percentage 5.0000
 Billing Frequency Months
 Finance Party Lekker Loans
 Finance Collects Finance Collects
 Fixed Service Fee 0.0000
 Fixed Admin Fee 0.0000
 Fixed Insurance 5.0000
 Other Fee 1 0.0000
 Other Fee 2 0.0000

- Item Usage

* Note: Usage information will only be saved if you select a Usage/Meter Type and valid Item information is provided above.
 * Usage/Meter Type Usage/Meter Type
 Minimum Billing Minimum Billing
 Free Usage Qty Free Usage Qty
 Average Qty Average Qty

Save Save + New Third Party Save + New Item Save + New Usage

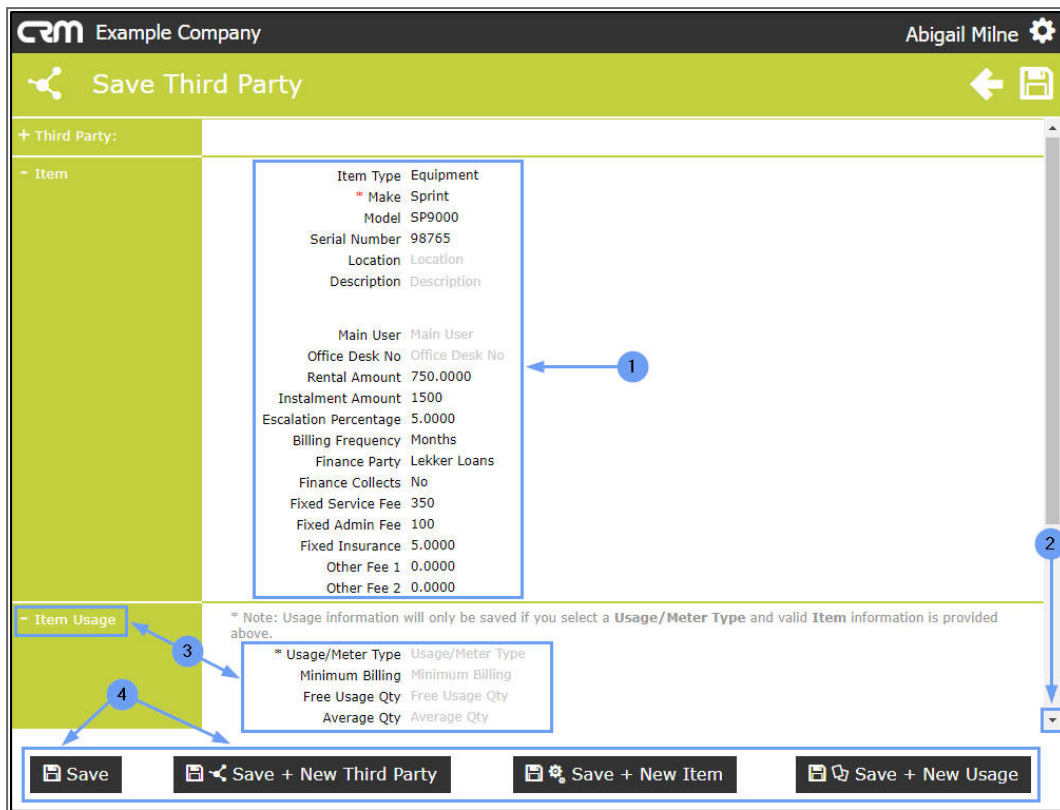
1. Once you have edited the Item details as required, you have several choices:

Either

2. Scroll down the page to view all the Item Usage details.
3. Add or Edit the Item Usage information as required.

Or

4. Select one of the Save Options as explained above.



CRM Example Company Abigail Milne

Save Third Party

+ Third Party:

- Item

Item Type: Equipment
 * Make: Sprint
 Model: SP9000
 Serial Number: 98765
 Location: Location
 Description: Description

Main User: Main User
 Office Desk No: Office Desk No
 Rental Amount: 750.0000
 Instalment Amount: 1500
 Escalation Percentage: 5.0000
 Billing Frequency: Months
 Finance Party: Lekker Loans
 Finance Collects: No
 Fixed Service Fee: 350
 Fixed Admin Fee: 100
 Fixed Insurance: 5.0000
 Other Fee 1: 0.0000
 Other Fee 2: 0.0000

- Item Usage

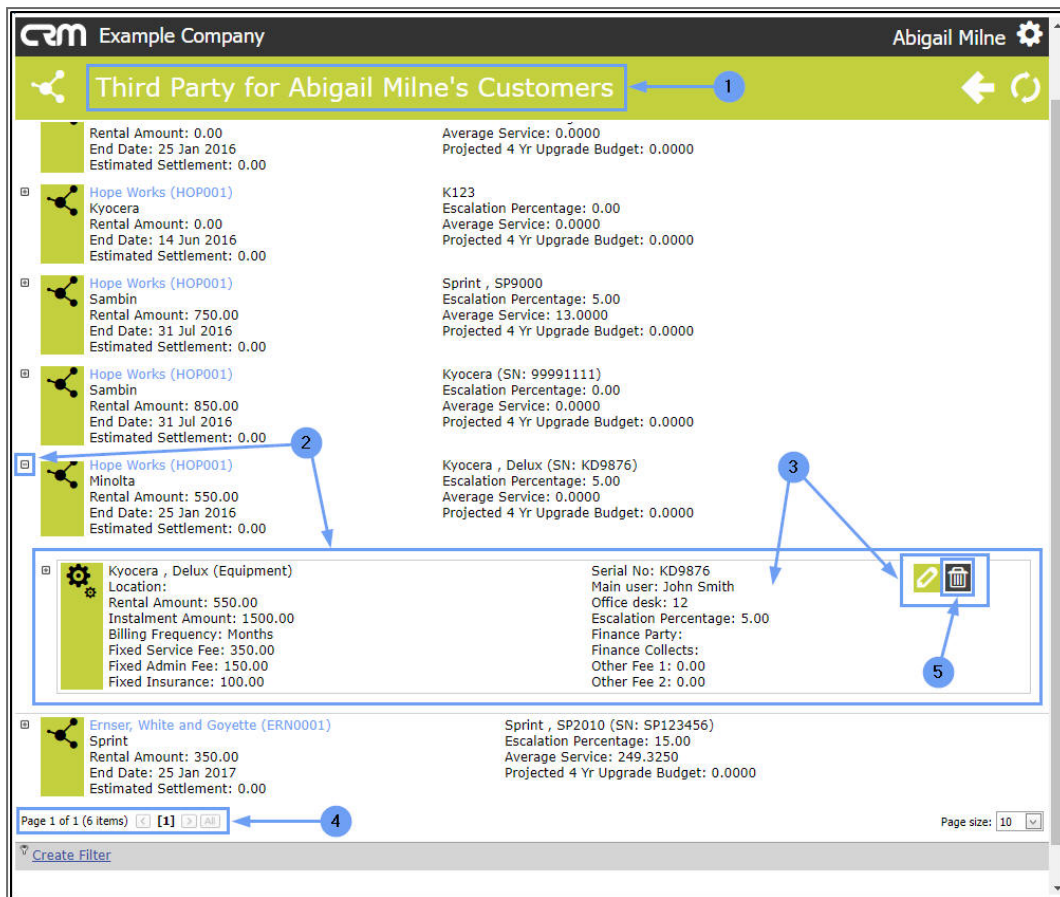
* Note: Usage information will only be saved if you select a Usage/Meter Type and valid Item information is provided above.

* Usage/Meter Type: Usage/Meter Type
 Minimum Billing: Minimum Billing
 Free Usage Qty: Free Usage Qty
 Average Qty: Average Qty

Save Save + New Third Party Save + New Item Save + New Usage

DELETE THIRD PARTY 'ITEM' INFORMATION

1. In the *Third Party for [Salesman's Name] Customers* page,
2. **Expand** the selected Third Party summary to display the *Item summary*.
3. **Hover over** this Item summary to reveal the *Actions buttons*.
4. Note that the *Page Reference field* states that there are currently **6** items.
5. Click on the **Delete** button.

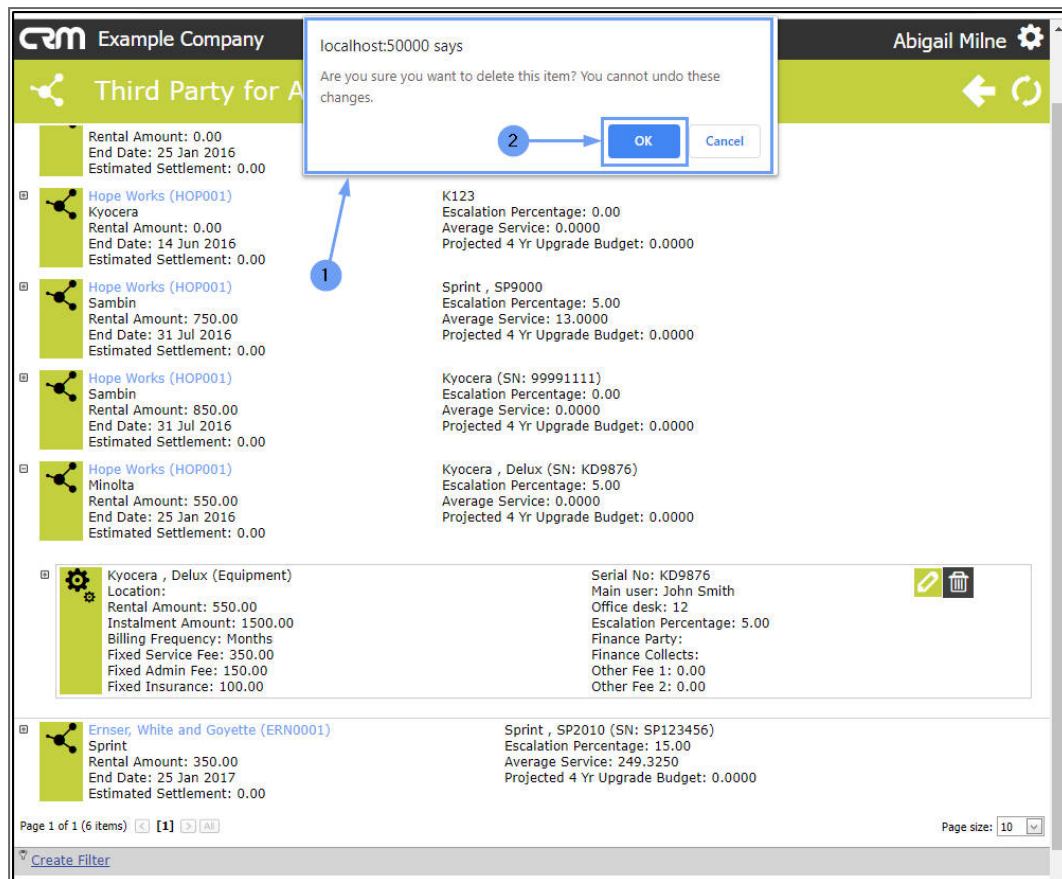


CRM Example Company Abigail Milne

Third Party for Abigail Milne's Customers

<p>Rental Amount: 0.00 End Date: 25 Jan 2016 Estimated Settlement: 0.00</p>	<p>Average Service: 0.0000 Projected 4 Yr Upgrade Budget: 0.0000</p>
<p>Hope Works (HOP001) Kyocera Rental Amount: 0.00 End Date: 14 Jun 2016 Estimated Settlement: 0.00</p>	<p>K123 Escalation Percentage: 0.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: 0.0000</p>
<p>Hope Works (HOP001) Sambin Rental Amount: 750.00 End Date: 31 Jul 2016 Estimated Settlement: 0.00</p>	<p>Sprint , SP9000 Escalation Percentage: 5.00 Average Service: 13.0000 Projected 4 Yr Upgrade Budget: 0.0000</p>
<p>Hope Works (HOP001) Sambin Rental Amount: 850.00 End Date: 31 Jul 2016 Estimated Settlement: 0.00</p>	<p>Kyocera (SN: 99991111) Escalation Percentage: 0.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: 0.0000</p>
<p>Hope Works (HOP001) Minolta Rental Amount: 550.00 End Date: 25 Jan 2016 Estimated Settlement: 0.00</p>	<p>Kyocera , Delux (SN: KD9876) Escalation Percentage: 5.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: 0.0000</p>
<p>Kyocera , Delux (Equipment) Location: Rental Amount: 550.00 Instalment Amount: 1500.00 Billing Frequency: Months Fixed Service Fee: 350.00 Fixed Admin Fee: 150.00 Fixed Insurance: 100.00</p>	<p>Serial No: KD9876 Main user: John Smith Office desk: 12 Escalation Percentage: 5.00 Finance Party: Finance Collects: Other Fee 1: 0.00 Other Fee 2: 0.00</p>
<p>Ernsner, White and Goyette (ERN0001) Sprint Rental Amount: 350.00 End Date: 25 Jan 2017 Estimated Settlement: 0.00</p>	<p>Sprint , SP2010 (SN: SP123456) Escalation Percentage: 15.00 Average Service: 249.3250 Projected 4 Yr Upgrade Budget: 0.0000</p>

Page 1 of 1 (6 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] [1001] [1002] [1003] [1004] [1005] [1006] [1007] [1008] [1009] [1010] [1011] [1012] [1013] [1014] [1015] [1016] [1017] [1018] [1019] [1020] [1021] [1022] [1023] [1024] [1025] [1026] [1027] [1028] [1029] [1030] [1031] [1032] [1033] [1034] [1035] [1036] [1037] [1038] [1039] [1040] [1041] [1042] [1043] [1044] [1045] [1046] [1047] [1048] [1049] [1050] [1051] [1052] [1053] [1054] [1055] [1056] [1057] [1058] [1059] [1060] [1061] [1062] [1063] [1064] [1065] [1066] [1067] [1068] [1069] [1070] [1071] [1072] [1073] [1074] [1075] [1076] [1077] [1078] [1079] [1080] [1081] [1082] [1083] [1084] [1085] [1086] [1087] [1088] [1089] [1090] [1091] [1092] [1093] [1094] [1095] [1096] [1097] [1098] [1099] [1100] [1101] [1102] [1103] [1104] [1105] [1106] [1107] [1108] [1109] [1110] [1111] [1112] [1113] [1114] [1115] [1116] [1117] [1118] [1119] [1120] [1121] [1122] [1123] [1124] [1125] [1126] [1127] [1128] [1129] [1130] [1131] [1132] [1133] [1134] [1135] [1136] [1137] [1138] [1139] [1140] [1141] [1142] [1143] [1144] [1145] [1146] [1147] [1148] [1149] [1150] [1151] [1152] [1153] [1154] [1155] [1156] [1157] [1158] [1159] [1160] [1161] [1162] [1163] [1164] [1165] [1166] [1167] [1168] [1169] [1170] [1171] [1172] [1173] [1174] [1175] [1176] [1177] [1178] [1179] [1180] [1181] [1182] [1183] [1184] [1185] [1186] [1187] [1188] [1189] [1190] [1191] [1192] [1193] [1194] [1195] [1196] [1197] [1198] [1199] [1200] [1201] [1202] [1203] [1204] [1205] [1206] [1207] [1208] [1209] [1210] [1211] [1212] [1213] [1214] [1215] [1216] [1217] [1218] [1219] [1220] [1221] [1222] [1223] [1224] [1225] [1226] [1227] [1228] [1229] [1230] [1231] [1232] [1233] [1234] [1235] [1236] [1237] [1238] [1239] [1240] [1241] [1242] [1243] [1244] [1245] [1246] [1247] [1248] [1249] [1250] [1251] [1252] [1253] [1254] [1255] [1256] [1257] [1258] [1259] [1260] [1261] [1262] [1263] [1264] [1265] [1266] [1267] [1268] [1269] [1270] [1271] [1272] [1273] [1274] [1275] [1276] [1277] [1278] [1279] [1280] [1281] [1282] [1283] [1284] [1285] [1286] [1287] [1288] [1289] [1290] [1291] [1292] [1293] [1294] [1295] [1296] [1297] [1298] [1299] [1300] [1301] [1302] [1303] [1304] [1305] [1306] [1307] [1308] [1309] [1310] [1311] [1312] [1313] [1314] [1315] [1316] [1317] [1318] [1319] [1320] [1321] [1322] [1323] [1324] [1325] [1326] [1327] [1328] [1329] [1330] [1331] [1332] [1333] [1334] [1335] [1336] [1337] [1338] [1339] [1340] [1341] [1342] [1343] [1344] [1345] [1346] [1347] [1348] [1349] [1350] [1351] [1352] [1353] [1354] [1355] [1356] [1357] [1358] [1359] [1360] [1361] [1362] [1363] [1364] [1365] [1366] [1367] [1368] [1369] [1370] [1371] [1372] [1373] [1374] [1375] [1376] [1377] [1378] [1379] [1380] [1381] [1382] [1383] [1384] [1385] [1386] [1387] [1388] [1389] [1390] [1391] [1392] [1393] [1394] [1395] [1396] [1397] [1398] [1399] [1400] [1401] [1402] [1403] [1404] [1405] [1406] [1407] [1408] [1409] [1410] [1411] [1412] [1413] [1414] [1415] [1416] [1417] [1418] [1419] [1420] [1421] [1422] [1423] [1424] [1425] [1426] [1427] [1428] [1429] [1430] [1431] [1432] [1433] [1434] [1435] [1436] [1437] [1438] [1439] [1440] [1441] [1442] [1443] [1444] [1445] [1446] [1447] [1448] [1449] [1450] [1451] [1452] [1453] [1454] [1455] [1456] [1457] [1458] [1459] [1460] [1461] [1462] [1463] [1464] [1465] [1466] [1467] [1468] [1469] [1470] [1471] [1472] [1473] [1474] [1475] [1476] [1477] [1478] [1479] [1480] [1481] [1482] [1483] [1484] [1485] [1486] [1487] [1488] [1489] [1490] [1491] [1492] [1493] [1494] [1495] [1496] [1497] [1498] [1499] [1500] [1501] [1502] [1503] [1504] [1505] [1506] [1507] [1508] [1509] [1510] [1511] [1512] [1513] [1514] [1515] [1516] [1517] [1518] [1519] [1520] [1521] [1522] [1523] [1524] [1525] [1526] [1527] [1528] [1529] [1530] [1531] [1532] [1533] [1534] [1535] [1536] [1537] [1538] [1539] [1540] [1541] [1542] [1543] [1544] [1545] [1546] [1547] [1548] [1549] [1550] [1551] [1552] [1553] [1554] [1555] [1556] [1557] [1558] [1559] [1560] [1561] [1562] [1563] [1564] [1565] [1566] [1567] [1568] [1569] [1570] [1571] [1572] [1573] [1574] [1575] [1576] [1577] [1578] [1579] [1580] [1581] [1582] [1583] [1584] [1585] [1586] [1587] [1588] [1589] [1590] [1591] [1592] [1593] [1594] [1595] [1596] [1597] [1598] [1599] [1600] [1601] [1602] [1603] [1604] [1605] [1606] [1607] [1608] [1609] [1610] [1611] [1612] [1613] [1614] [1615] [1616] [1617] [1618] [1619] [1620] [1621] [1622] [1623] [1624] [1625] [1626] [1627] [1628] [1629] [1630] [1631] [1632] [1633] [1634] [1635] [1636] [1637] [1638] [1639] [1640] [1641] [1642] [1643] [1644] [1645] [1646] [1647] [1648] [1649] [1650] [1651] [1652] [1653] [1654] [1655] [1656] [1657] [1658] [1659] [1660] [1661] [1662] [1663] [1664] [1665] [1666] [1667] [1668] [1669] [1670] [1671] [1672] [1673] [1674] [1675] [1676] [1677] [1678] [1679] [1680] [1681] [1682] [1683] [1684] [1685] [1686] [1687] [1688] [1689] [1690] [1691] [1692] [1693] [1694] [1695] [1696] [1697] [1698] [1699] [1700] [1701] [1702] [1703] [1704] [1705] [1706] [1707] [1708] [1709] [1710] [1711] [1712] [1713] [1714] [1715] [1716] [1717] [1718] [1719] [1720] [1721] [1722] [1723] [1724] [1725] [1726] [1727] [1728] [1729] [1730] [1731] [1732] [1733] [1734] [1735] [1736] [1737] [1738] [1739] [1740] [1741] [1742] [1743] [1744] [1745] [1746] [1747] [1748] [1749] [1750] [1751] [1752] [1753] [1754] [1755] [1756] [1757] [1758] [1759] [1760] [1761] [1762] [1763] [1764] [1765] [1766] [1767] [1768] [1769] [1770] [1771] [1772] [1773] [1774] [1775] [1776] [1777] [1778] [1779] [1780] [1781] [1782] [1783] [1784] [1785] [1786] [1787] [1788] [1789] [1790] [1791] [1792] [1793] [1794] [1795] [1796] [1797] [1798] [1799] [1800] [1801] [1802] [1803] [1804] [1805] [1806] [1807] [1808] [1809] [1810] [1811] [1812] [1813] [1814] [1815] [1816] [1817] [1818] [1819] [1820] [1821] [1822] [1823] [1824] [1825] [1826] [1827] [1828] [1829] [1830] [1831] [1832] [1833] [1834] [1835] [1836] [1837] [1838] [1839] [1840] [1841] [1842] [1843] [1844] [1845] [1846] [1847] [1848] [1849] [1850] [1851] [1852] [1853] [1854] [1855] [1856] [1857] [1858] [1859] [1860] [1861] [1862] [1863] [1864] [1865] [1866] [1867] [1868] [1869] [1870] [1871] [1872] [1873] [1874] [1875] [1876] [1877] [1878] [1879] [1880] [1881] [1882] [1883] [1884] [1885] [1886] [1887] [1888] [1889] [1890] [1891] [1892] [1893] [1894] [1895] [1896] [1897] [1898] [1899] [1900] [1901] [1902] [1903] [1904] [1905] [1906] [1907] [1908] [1909] [1910] [1911] [1912] [1913] [1914] [1915] [1916] [1917] [1918] [1919] [1920] [1921] [1922] [1923] [1924] [1925] [1926] [1927] [1928] [1929] [1930] [1931] [1932] [1933] [1934] [1935] [1936] [1937] [1938] [1939] [1940] [1941] [1942] [1943] [1944] [1945] [1946] [1947] [1948] [1949] [1950] [1951] [1952] [1953] [1954] [1955] [1956] [1957] [1958] [1959] [1960] [1961] [1962] [1963] [1964] [1965] [1966] [1967] [1968] [1969] [1970] [1971] [1972] [1973] [1974] [1975] [1976] [1977] [1978] [1979] [1980] [1981] [1982] [1983] [1984] [1985] [1986] [1987] [1988] [1989] [1990] [1991] [1992] [1993] [1994] [1995] [1996] [1997] [1998] [1999] [2000] [2001] [2002] [2003] [2004] [2005] [2006] [2007] [2008] [2009] [2010] [2011] [2012] [2013] [2014] [2015] [2016] [2017] [2018] [2019] [2020] [2021] [2022] [2023] [2024] [2025] [2026] [2027] [2028] [2029] [2030] [2031] [2032] [2033] [2034] [20



- The screen will refresh and the deleted item will be removed. The Page Reference field will adjust to reflect the reduced number of items.

VIEW / EDIT / ADD THIRD PARTY ' ITEM USAGE' INFORMATION

You can navigate to the **Item Usage** frame in 2 ways:

1. In the **Third Party for [Salesman's Name] Customers** page
2. Hover over a Third Party summary to reveal the **Action Item** buttons:
3. Click on the **View/Edit this Third Party** button.

CRM Example Company Abigail Milne

Third Party for Abigail Milne's Customers

Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
Hope Works (HOP001)	Cable and Co. Rental Amount: 600.00 End Date: 01 Jan 2020 Estimated Settlement: 1820.83	Cables , CAB100 (SN: CAB100200) Escalation Percentage: 5.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: -1820.8288			
ABC Shoe Co (ABCXYZ123)	Toner-Town Rental Amount: 350.00 End Date: 01 Jan 2020 Estimated Settlement: 1062.15	Kyocera , TON100 (SN: TON100111) Escalation Percentage: 5.00 Average Service: 2005.0000 Projected 4 Yr Upgrade Budget: -1062.1502			
King Copiers (KIN0001)	Office Works Rental Amount: 200.00 End Date: 01 Jan 2020 Estimated Settlement: 607.95	Kyocera , ACC100 (SN: ACC100200) Escalation Percentage: 5.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: -607.9527			
King Copiers (KIN0001)	Green Office Rental Amount: 600.00 End Date: 01 Jan 2021 Estimated Settlement: 9234.23	SoftCo , SOF100 (SN: SOF100200) Escalation Percentage: 5.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: -9234.2314			

Page 1 of 1 (4 Items) [1] [A] Page size: 10

[Create Filter](#)

1. The **Save Third Party** page will open.
2. Click on the expand icon in front of **Item Usage**.

CRM Example Company Abigail Milne

Save Third Party

- Third Party:

Rental Contract No. 10100
 * Third Party Name Toner-Town
 Start Date 1 Jan 2019
 End Date 1 Jan 2020
 Payment Frequency Months
 Escalation Percent 5.0000
 Interest Rate 3.0000
 Comments Comments

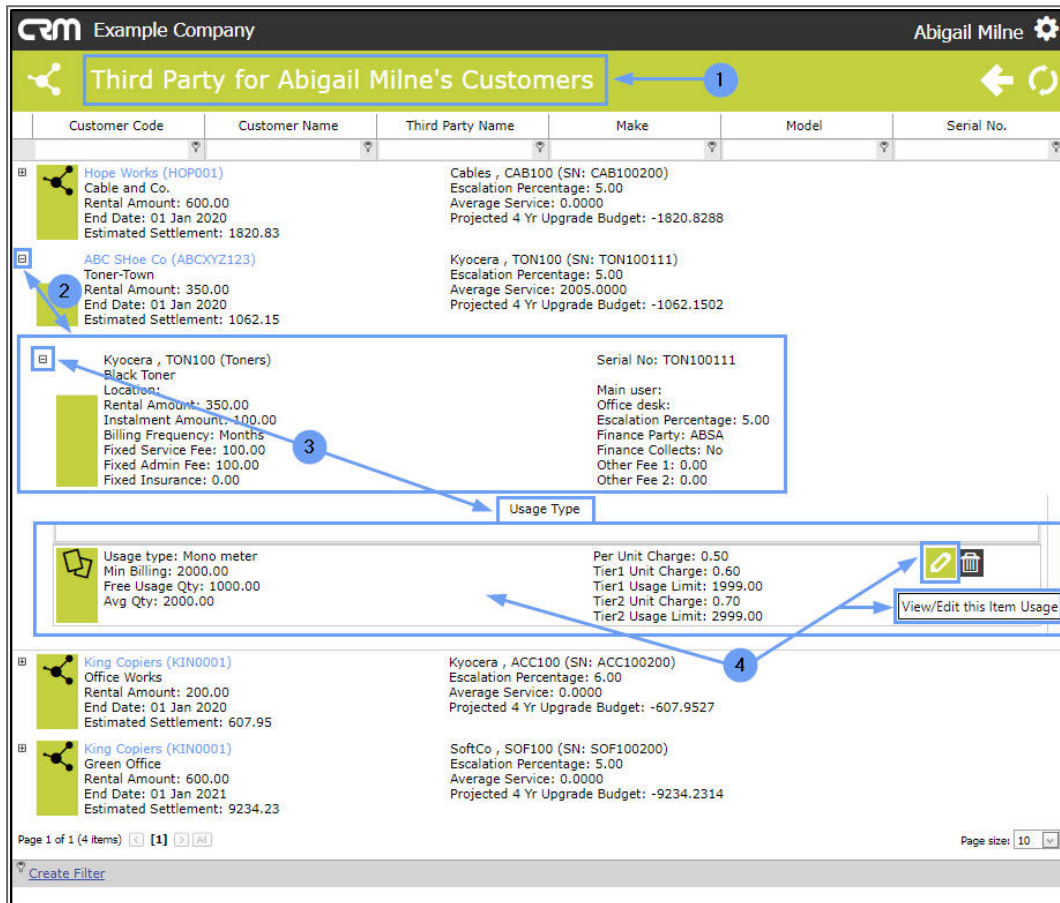
+ Item

+ Item Usage

Save **Save + New Third Party** **Save + New Item** **Save + New Usage**

Or

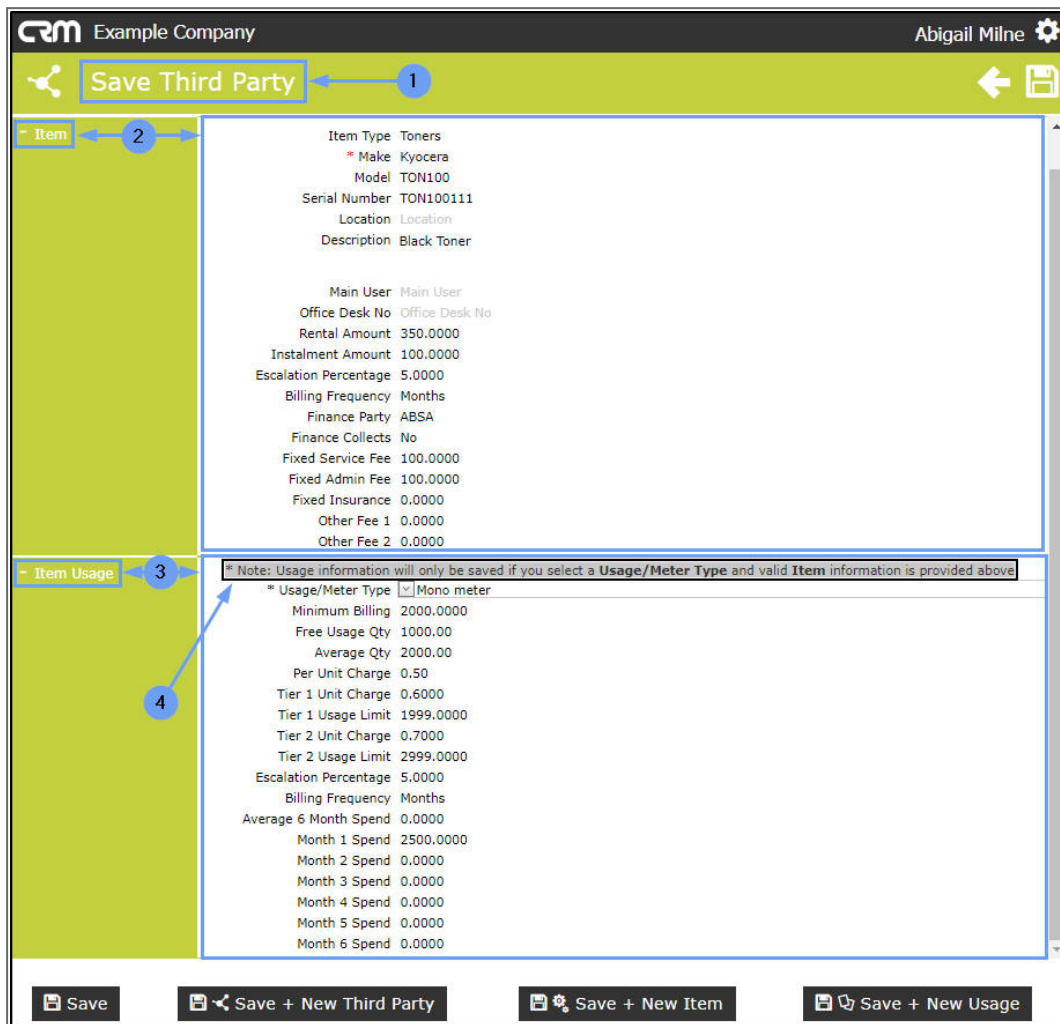
1. In the **Third Party for [Salesman's Name] Customers** page
2. **Expand** the selected Third Party Main Information summary to reveal the **Item** summary.
3. **Expand** this Item summary to reveal the Item **Usage Type** summary.
4. **Hover over** the Item Usage Type summary to reveal the Action buttons and click on the **View / Edit this Item Usage** Action button.



The screenshot shows the CRM interface for 'Example Company' with user 'Abigail Milne'. The main heading is 'Third Party for Abigail Milne's Customers'. Below this is a table with columns: Customer Code, Customer Name, Third Party Name, Make, Model, and Serial No. The table lists several customers and their associated items. The 'Item' summary for 'Kycocera, TON100 (Toners)' is expanded, showing details like Rental Amount, End Date, and Estimated Settlement. The 'Usage Type' summary is also expanded, showing details like Usage type, Min Billing, Free Usage Qty, and Avg Qty. The 'View/Edit this Item Usage' button is visible in the bottom right corner of the 'Usage Type' summary.

1. The **Save Third party** page will open.
2. Both the **Item** frame and the
3. **Item Usage** frame will be expanded ready for you to Add / Edit / Delete Item and Item Usage information.
4. The reason that both frames are auto-expanded is explained in the **Note** found at the top of the Item Usage frame:

* **Note:** Usage information will only be saved if you select a Usage/Meter Type and valid Item information is provided above.



CRM Example Company Abigail Milne

Save Third Party

Item

Item Type Toners
 * Make Kyocera
 Model TON100
 Serial Number TON100111
 Location Location
 Description Black Toner

Main User Main User
 Office Desk No Office Desk No
 Rental Amount 350.0000
 Instalment Amount 100.0000
 Escalation Percentage 5.0000
 Billing Frequency Months
 Finance Party ABSA
 Finance Collects No
 Fixed Service Fee 100.0000
 Fixed Admin Fee 100.0000
 Fixed Insurance 0.0000
 Other Fee 1 0.0000
 Other Fee 2 0.0000

Item Usage


* Note: Usage information will only be saved if you select a Usage/Meter Type and valid Item information is provided above


* Usage/Meter Type Mono meter
 Minimum Billing 2000.0000
 Free Usage Qty 1000.00
 Average Qty 2000.00
 Per Unit Charge 0.50
 Tier 1 Unit Charge 0.6000
 Tier 1 Usage Limit 1999.0000
 Tier 2 Unit Charge 0.7000
 Tier 2 Usage Limit 2999.0000
 Escalation Percentage 5.0000
 Billing Frequency Months
 Average 6 Month Spend 0.0000
 Month 1 Spend 2500.0000
 Month 2 Spend 0.0000
 Month 3 Spend 0.0000
 Month 4 Spend 0.0000
 Month 5 Spend 0.0000
 Month 6 Spend 0.0000




Save Save + New Third Party Save + New Item Save + New Usage

- **Add** or **Edit** the Item Usage information as required:
 - **Usage / Meter Type:** Select from the drop-down menu the type e.g. Mono meter, Colour A3.
 - **Minimum Billing:** Either type in or use the arrow indicators to select the minimum billing amount (in Rand value), if applicable
 - **Free Usage Qty:** Either type in or use the arrow indicators to select the free usage quantity, if applicable.

- **Average Qty:** Either type in or use the arrow indicators to select the average usage quantity.
- **Per Unit Charge:** Either type in or use the arrow indicators to select the per unit charge.


Example Company

Abigail Milne



Save Third Party



Item

Item Type Toners
* Make Kyocera
Model TON100
Serial Number TON100111
Location Location
Description Black Toner

Main User Main User
Office Desk No Office Desk No
Rental Amount 350.0000
Instalment Amount 100.0000
Escalation Percentage 5.0000
Billing Frequency Months
Finance Party ABSA
Finance Collects No
Fixed Service Fee 100.0000
Fixed Admin Fee 100.0000
Fixed Insurance 0.0000
Other Fee 1 0.0000
Other Fee 2 0.0000

Item Usage

* Note: Usage information will only be saved if you select a Usage/Meter Type and valid Item information is provided above.

* Usage/Meter Type ☒ Mono meter

Minimum Billing 2000.0000

Free Usage Qty 1000.00

Average Qty 2000.00

Per Unit Charge 0.50

Tier 1 Unit Charge 0.6000

Tier 1 Usage Limit 1999.0000

Tier 2 Unit Charge 0.7000

Tier 2 Usage Limit 2999.0000

Escalation Percentage 5.0000

Billing Frequency Months

Average 6 Month Spend 0.0000

Month 1 Spend 2500.0000


Month 2 Spend 0.0000


Month 3 Spend 0.0000

Month 4 Spend 0.0000


Month 5 Spend 0.0000

Month 6 Spend 0.0000


 Save


 Save + New Third Party




 Save + New Item

 Save + New Usage

- **Tier 1 Unit Charge:**
- **Tier 1 Usage Limit:**
- **Tier 2 Unit Charge:**
- **Tier 2 Usage Limit:**


Example Company

Abigail Milne



Save Third Party



Item


Item Type Toners
* Make Kyocera
Model TON100
Serial Number TON100111
Location Location
Description Black Toner


Main User Main User
Office Desk No Office Desk No
Rental Amount 350.0000
Instalment Amount 100.0000
Escalation Percentage 5.0000
Billing Frequency Months
Finance Party ABSA
Finance Collects No
Fixed Service Fee 100.0000
Fixed Admin Fee 100.0000
Fixed Insurance 0.0000
Other Fee 1 0.0000
Other Fee 2 0.0000


Item Usage


* Note: Usage information will only be saved if you select a Usage/Meter Type and valid Item information is provided above.

* Usage/Meter Type ☒ Mono meter
Minimum Billing 2000.0000
Free Usage Qty 1000.00
Average Qty 2000.00
Per Unit Charge 0.50
Tier 1 Unit Charge 0.6000
Tier 1 Usage Limit 1999.0000
Tier 2 Unit Charge 0.7000
Tier 2 Usage Limit 2999.0000
Escalation Percentage 5.0000
Billing Frequency Months
Average 6 Month Spend 0.0000
Month 1 Spend 2500.0000
Month 2 Spend 0.0000
Month 3 Spend 0.0000
Month 4 Spend 0.0000
Month 5 Spend 0.0000
Month 6 Spend 0.0000

 Save

 Save + New Third Party

 Save + New Item

 Save + New Usage

- Escalation Percentage:
- Billing Frequency:
- Average 6 Month Spend:
- Month 1 Spend to Month 6 Spend:

CRM Example Company

Abigail Milne

Save Third Party

Item

Item Type

Toners

* Make

Kyocera

Model

TON100

Serial Number

TON100111

Location

Location

Description

Black Toner

Main User

Main User

Office Desk No

Office Desk No

Rental Amount

350.0000

Instalment Amount

100.0000

Escalation Percentage

5.0000

Billing Frequency

Months

Finance Party

ABSA

Finance Collects

No

Fixed Service Fee

100.0000

Fixed Admin Fee

100.0000

Fixed Insurance

0.0000

Other Fee 1

0.0000

Other Fee 2

0.0000

Item Usage

* Note: Usage information will only be saved if you select a Usage/Meter Type and valid Item information is provided above.

* Usage/Meter Type

☒ Mono meter

Minimum Billing

2000.0000

Free Usage Qty

1000.00

Average Qty

2000.00

Per Unit Charge

0.50

Tier 1 Unit Charge

0.6000

Tier 1 Usage Limit

1999.0000

Tier 2 Unit Charge

0.7000

Tier 2 Usage Limit

2999.0000

Escalation Percentage

5.0000

Billing Frequency

Months

Average 6 Month Spend

0.0000

Month 1 Spend

2500.0000

Month 2 Spend

0.0000

Month 3 Spend

0.0000

Month 4 Spend

0.0000

Month 5 Spend

0.0000

Month 6 Spend

0.0000

Save

Save + New Third Party

Save + New Item

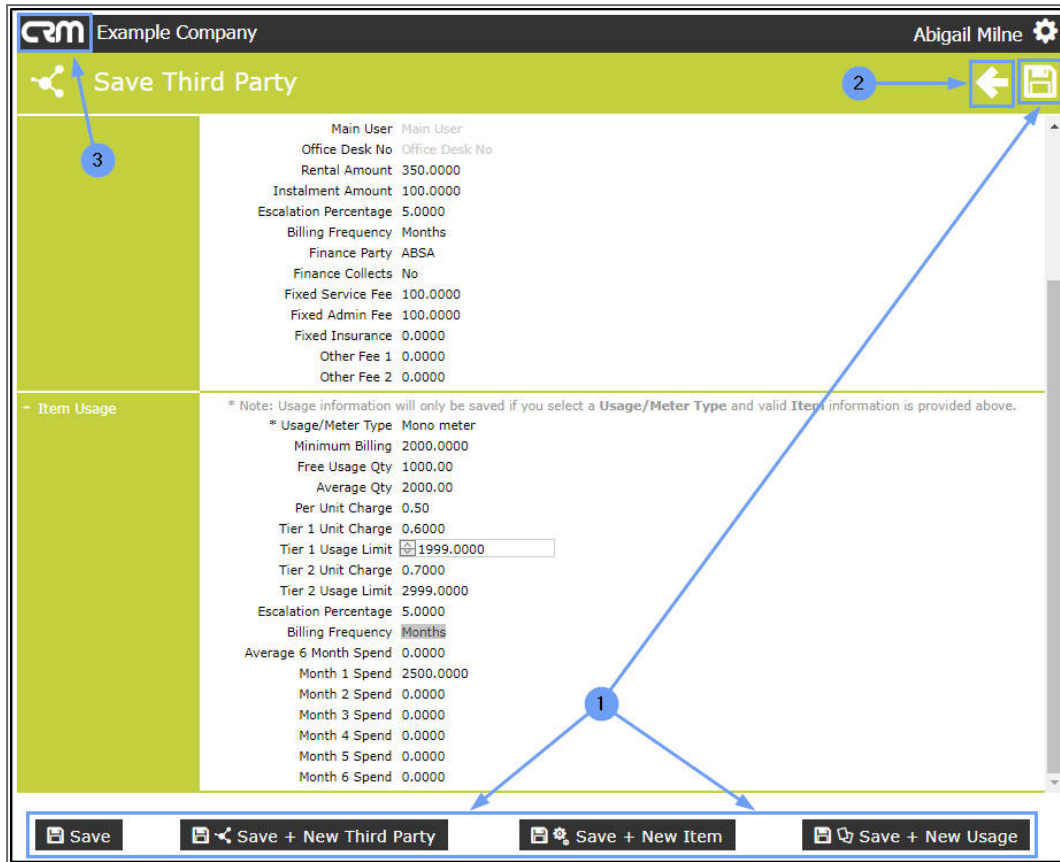
Save + New Usage

- When you have finished adding or editing the **Item Usage** information,

Either,

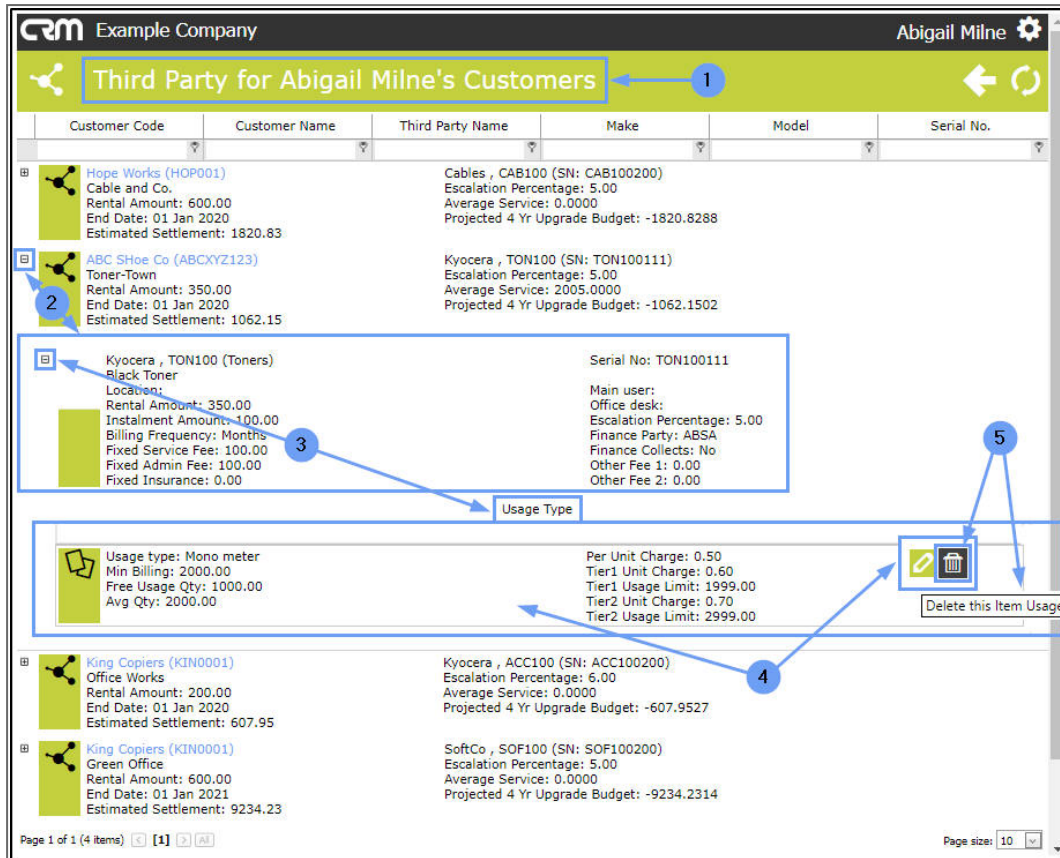
- Select one of the Save Options or
- or,
- Click on **Back** to return to the **previous page** (any changes made will not be saved)
- or,
- Click on the **CRM logo** to return to the **Dashboard** (Home page), (any changes made will not be saved).

Note: If you are adding equipment that has multiple meters - then select '**Save + New Usage**' to add another meter.



DELETE THIRD PARTY 'ITEM USAGE' INFORMATION

1. In the *Third Party for [Salesman's Name] Customers* page
2. **Expand** the selected Third Party *Main Information* summary to reveal the *Item* summary.
3. **Expand** this Item summary to reveal the Item *Usage Type* summary.
4. **Hover over** the Item Usage Type summary to reveal the *Action buttons*.
5. Click on the *Delete this Item Usage* Action button.



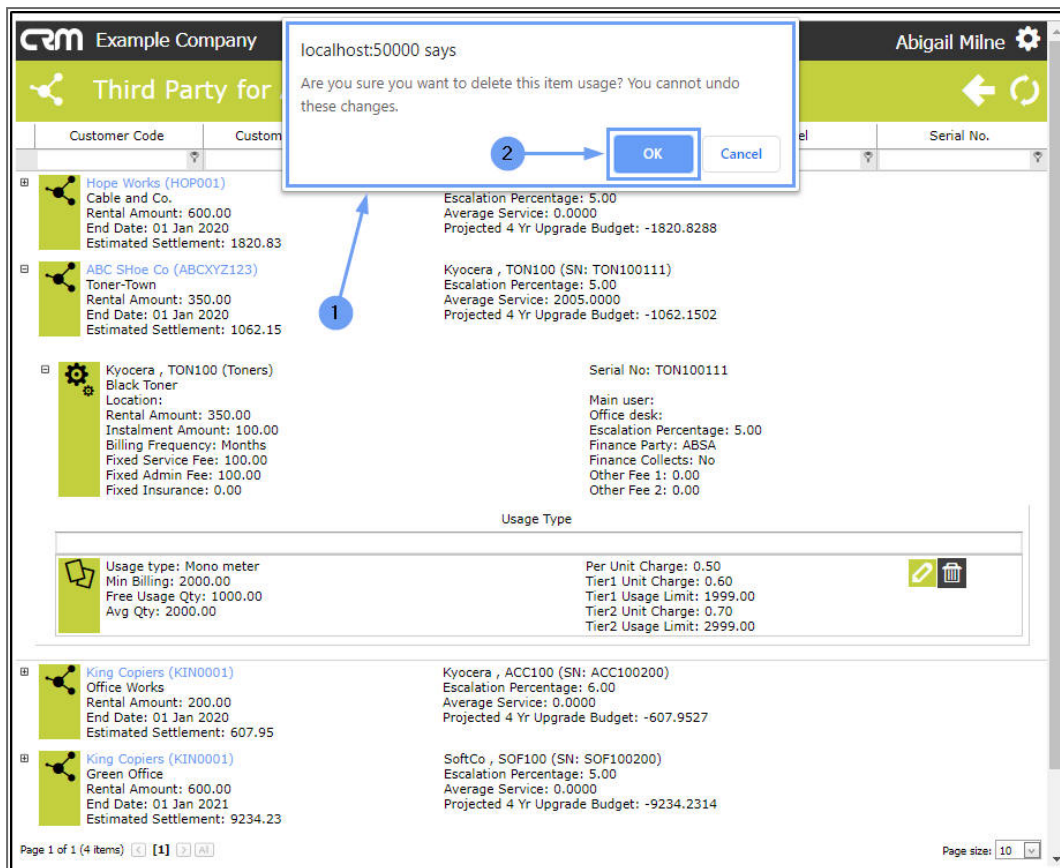
CRM Example Company Abigail Milne

Third Party for Abigail Milne's Customers

Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
HOP001	Hope Works (HOP001)	Cable and Co.	Cables , CAB100 (SN: CAB100200)		
	Rental Amount: 600.00		Escalation Percentage: 5.00		
	End Date: 01 Jan 2020		Average Service: 0.0000		
	Estimated Settlement: 1820.83		Projected 4 Yr Upgrade Budget: -1820.8288		
ABC	ABC SHoe Co (ABCKYZ123)	Toner-Town	Kyocera , TON100 (SN: TON100111)		
	Rental Amount: 350.00		Escalation Percentage: 5.00		
	End Date: 01 Jan 2020		Average Service: 2005.0000		
	Estimated Settlement: 1062.15		Projected 4 Yr Upgrade Budget: -1062.1502		
	Kyocera , TON100 (Toners)		Serial No: TON100111		
	Black Toner		Main user:		
	Location:		Office desk:		
	Rental Amount: 350.00		Escalation Percentage: 5.00		
	Instalment Amount: 100.00		Finance Party: ABSA		
	Billing Frequency: Months		Finance Collects: No		
	Fixed Service Fee: 100.00		Other Fee 1: 0.00		
	Fixed Admin Fee: 100.00		Other Fee 2: 0.00		
	Fixed Insurance: 0.00				
	Usage type: Mono meter		Per Unit Charge: 0.50		
	Min Billing: 2000.00		Tier1 Unit Charge: 0.60		
	Free Usage Qty: 1000.00		Tier1 Usage Limit: 1999.00		
	Avg Qty: 2000.00		Tier2 Unit Charge: 0.70		
			Tier2 Usage Limit: 2999.00		
KIN0001	King Copiers (KIN0001)	Office Works	Kyocera , ACC100 (SN: ACC100200)		
	Rental Amount: 200.00		Escalation Percentage: 6.00		
	End Date: 01 Jan 2020		Average Service: 0.0000		
	Estimated Settlement: 607.95		Projected 4 Yr Upgrade Budget: -607.9527		
KIN0001	King Copiers (KIN0001)	Green Office	SoftCo , SOF100 (SN: SOF100200)		
	Rental Amount: 600.00		Escalation Percentage: 5.00		
	End Date: 01 Jan 2021		Average Service: 0.0000		
	Estimated Settlement: 9234.23		Projected 4 Yr Upgrade Budget: -9234.2314		

Page 1 of 1 (4 items) [1] [All] Page size: 10

1. A message box will pop up asking;
 - ***Are you sure you want to delete this item usage? You cannot undo these changes.***
2. Click on **OK**.



1. The screen will **refresh** and the deleted item usage type information will be **removed**.
2. The Usage Type frame will contain a **No data to display** message.
3. Click on **Back** to return to the previous page or,
4. Click on the **CRM logo** to return to the CRM Homepage.

CRM

Example Company

Abigail Milne

Third Party for Abigail Milne's Customers

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Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
Hope Works (HOP001)	Cable and Co.	Cables , CAB100 (SN: CAB100200)			
	Rental Amount: 600.00	Escalation Percentage: 5.00			
	End Date: 01 Jan 2020	Average Service: 0.0000			
	Estimated Settlement: 1820.83	Projected 4 Yr Upgrade Budget: -1820.8288			
ABC Shoe Co (ABXYZ123)	Toner-Town	Kyocera , TON100 (SN: TON100111)			
	Rental Amount: 350.00	Escalation Percentage: 5.00			
	End Date: 01 Jan 2020	Average Service: 2005.0000			
	Estimated Settlement: 1062.15	Projected 4 Yr Upgrade Budget: -1062.1502			
Kyocera , TON100 (Toners)	Black Toner				Serial No: TON100111
	Location:				Main user:
	Rental Amount: 350.00				Office desk:
	Instalment Amount: 100.00				Escalation Percentage: 5.00
	Billing Frequency: Months				Finance Party: ABSA
	Fixed Service Fee: 100.00				Finance Collects: No
	Fixed Admin Fee: 100.00				Other Fee 1: 0.00
	Fixed Insurance: 0.00				Other Fee 2: 0.00
Usage Type					
No data to display					
King Copiers (KIN0001)	Office Works	Kyocera , ACC100 (SN: ACC100200)			
	Rental Amount: 200.00	Escalation Percentage: 5.00			
	End Date: 01 Jan 2020	Average Service: 0.0000			
	Estimated Settlement: 607.95	Projected 4 Yr Upgrade Budget: -607.9527			
King Copiers (KIN0001)	Green Office	SoftCo , SOF100 (SN: SOF100200)			
	Rental Amount: 600.00	Escalation Percentage: 5.00			
	End Date: 01 Jan 2021	Average Service: 0.0000			
	Estimated Settlement: 9234.23	Projected 4 Yr Upgrade Budget: -9234.2314			

Page 1 of 1 (4 items)

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Create Filter

Page size: 10

CRM.000.025