

# **CRM CUSTOMERS**

# **CUSTOMERS DASHBOARD**

The customers that you can view in CRM will be:

- the customers where you are the **main salesperson** or
- the customers where you are **linked** as a salesperson.

This list may include current BPO customers or New CRM Customers.

The **Customer Dashboard** is where you can view and access all of the selected customer details and information.

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

#### ACCESS THE CUSTOMER DASHBOARD

- 1. In the *Dashboard* (Home page),
- 2. Click on the *Customers* tile.



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	s for Last 30	Days	1 Month Performance	4 Month	Pipeline
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quotes	equipment	3rd party			
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- 1. The *Customers* listing page will be open.
- 2. You can use the Page Reference field,
- 3. the Filter Row or
- 4. the Filter Text Box to search for your customer.
- 5. Click on the selected customer icon in the *View* column.



	Type Custon	ner name sea	rch filter here	*				Q		
/iew	Customer	Code	Contact	Contact phone	Contact email	Complet	Status	Rank	Active	Ca Con
٠	Hope Works	HOP001	Duncan McCreddie	098 765 432	d.mccreddie@noer	n 91%	Active	Platinum	Yes	Yes
?	IT Supplies 5	ITS0001				8%	Active		No	No
?	Joes Carpentry Shop	JOE0001	Mary Watson	031 123 45€		50%	New - CRM	Gold	No	Yes
?	Judes Jewels	3 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 <mark>4</mark> 56		66%	Active	Silver	No	Yes
?	Lovely Test Customer	LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes

## **VIEW CUSTOMER DASHBOARD TILES / PAGE LINKS**

- 1. The *Customer Dashboard* (Customer Home page) will open.
- Most of the page tiles will link you to information <u>specific to the cus</u>tomer you have selected to view,
- 3. With the exception of the *Customers* tile which will take you back to the *Customers listing* page.



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- 1. In this *Customer Dashboard*,
- You will find the same tiles that you have available in the *Dashboard* (Home page):
  - Create Cold Call
  - Recommendations
  - Warnings
  - Customers
  - Cases
  - Activities
  - Quotes



- Equipment
- Third Party

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- You will also find the following additional Information tiles in this page:
  - Orders
  - Invoices
  - Credit Notes
  - Contracts
  - Service Calls
  - Files



#### **VIEW CUSTOMER ACTION BUTTONS**

 In the *Customer Dashboard* you can view and access the following information via the customer *Actions buttons*:



Note: Hover anywhere over the customer information frame to

display these buttons.

- View/Edit Customer
- Add Contact
- Add Third Party
- Add Note
- Release Customer
- Maintain Customer Salesmen
- Create Cold Call
- Add New Activity
- Add New Non-Case Related Quote
- 2. Click on an individual button to direct you to the relevant *Action* page.



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#### **VIEW ADDITIONAL CUSTOMER DETAILS TILES**

- You can also view and access more customer information via the customer *Details tiles* :
  - Sales
  - Addresses
  - Contacts
  - Open Activities
  - Notes
  - Salesmen



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## SETTINGS - 'HIDE DASHBOARD PANEL ON CUSTOMER PAGE' CHECKBOX

If you wish to have more <u>space</u> on this page to view your customer information more clearly, you can change your page *Settings*.

• Click on the *Settings* icon.



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- 1. The *Setting panel* will be expanded.
- 2. Select the 'Hide dashboard panel on customer page' checkbox.



#### Customer Dashboard



- 1. As you select the check box,
- 2. The *Dashboard panel* will disappear from the screen.



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			12 Months Sales History	
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• Click <u>outside</u> of the Settings frame to view the full page <u>without</u> the Dashboard.



#### Customer Dashboard



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