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]:[port-no]/BPOCRM/User.aspx*

ACCESS THE CUSTOMER DASHBOARD

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

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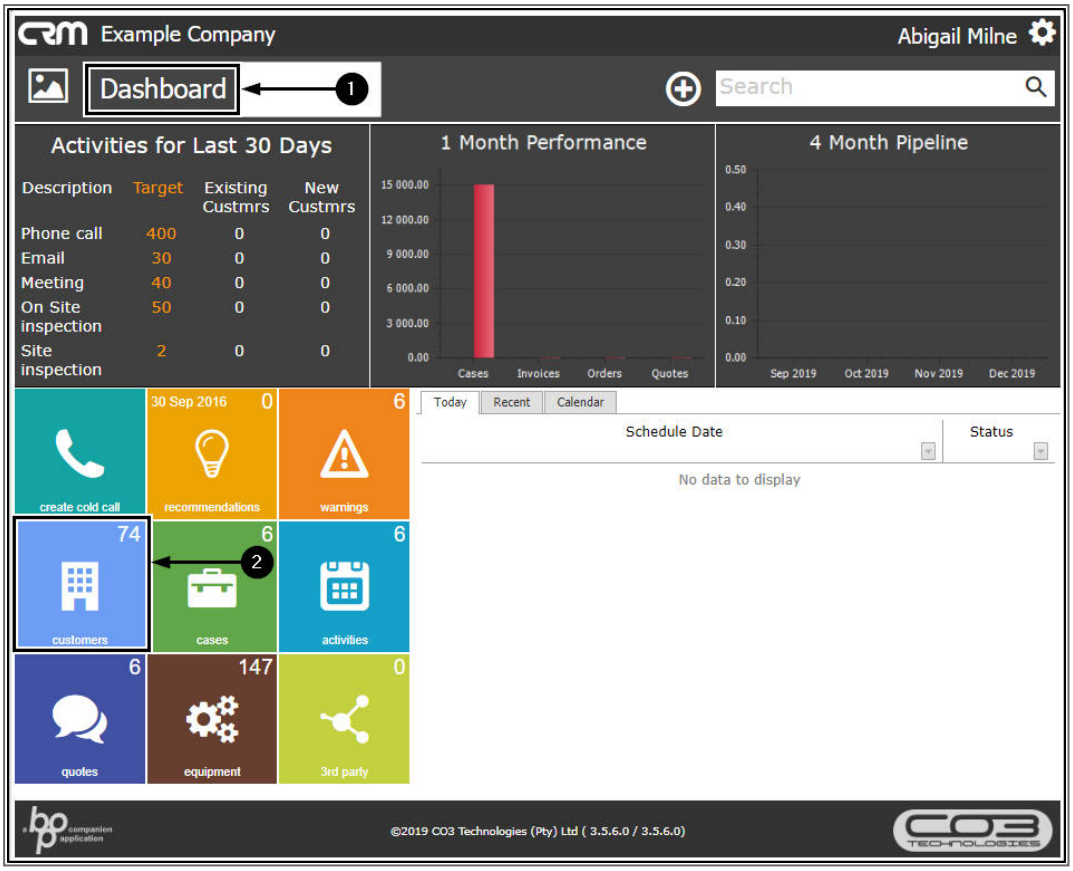

1. The ***Customers*** listing page will be open.
2. You can use the Page Reference field,
3. the Filter Row or
4. the Filter Text Box to search for your customer.
5. Click on the selected customer icon in the ***View*** column.

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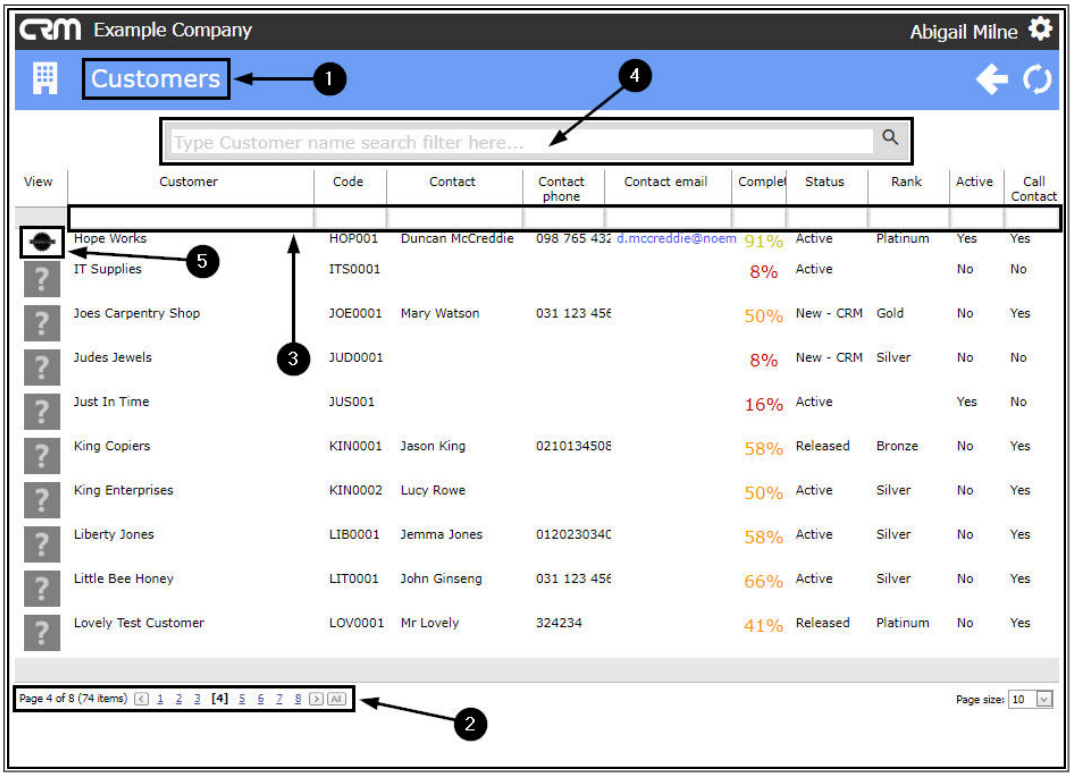

VIEW CUSTOMER DASHBOARD TILES / PAGE LINKS

1. The ***Customer Dashboard*** (Customer Home page) will open.
2. Most of the page tiles will link you to information specific to the customer 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***,
2. You will find the same tiles that you have available in the ***Dashboard*** (Home page):
    - Create Cold Call
    - Recommendations
    - Warnings
    - Customers
    - Cases
    - Activities
    - Quotes

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- Equipment
- Third Party

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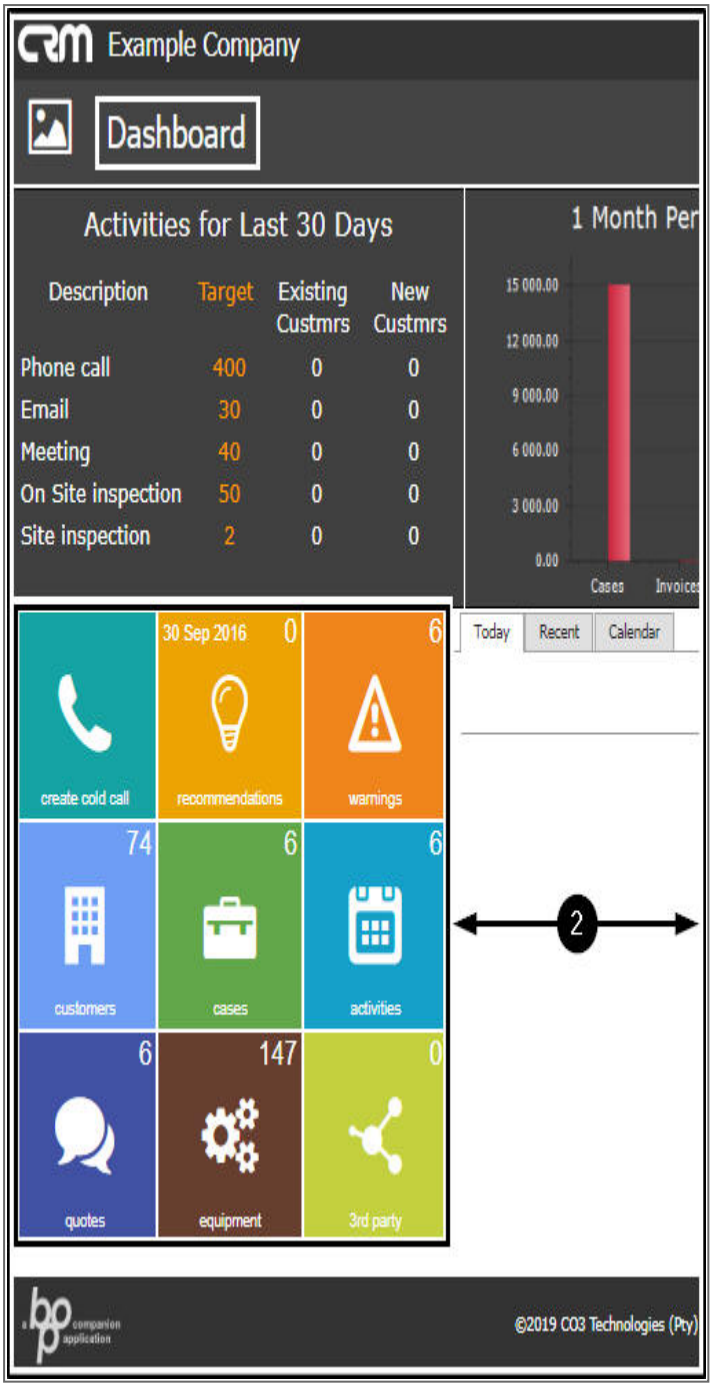

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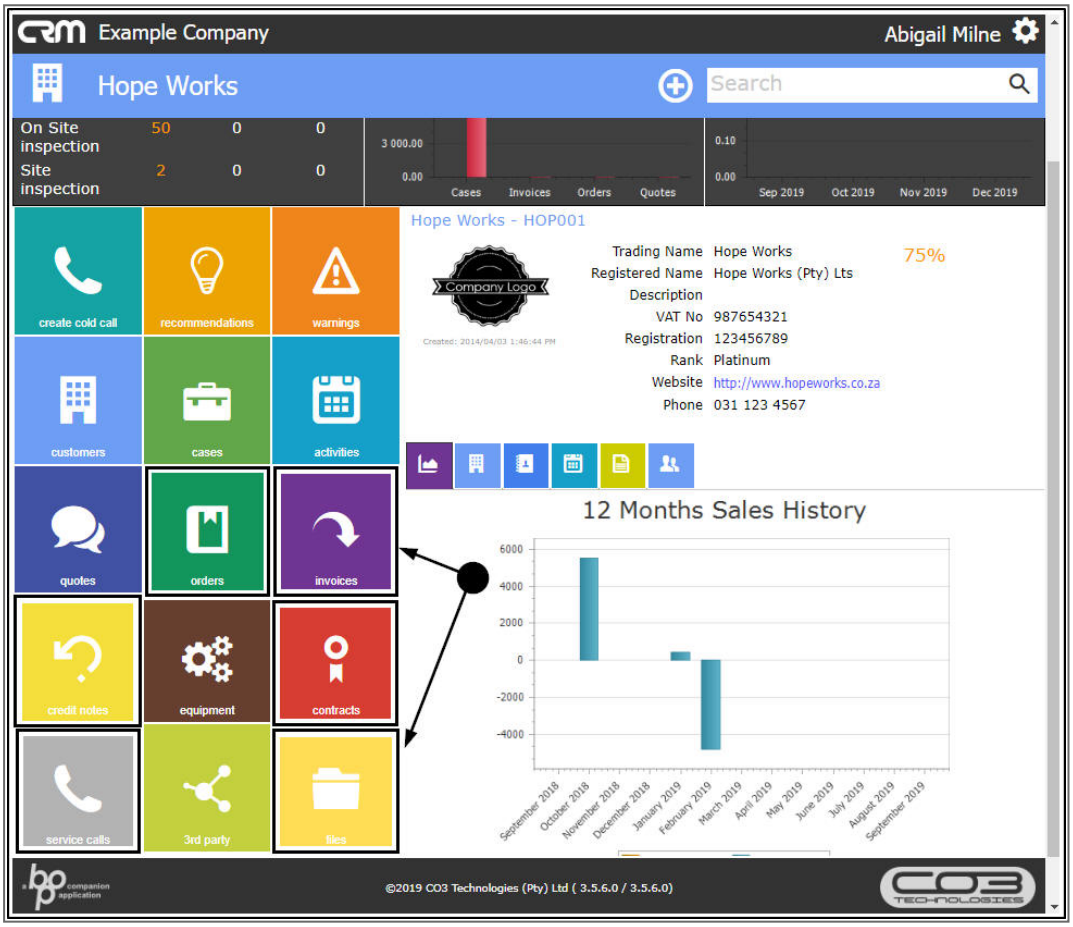
- You will also find the following additional Information tiles in this page:
    - Orders
    - Invoices
    - Credit Notes
    - Contracts
    - Service Calls
    - Files



VIEW CUSTOMER ACTION BUTTONS

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

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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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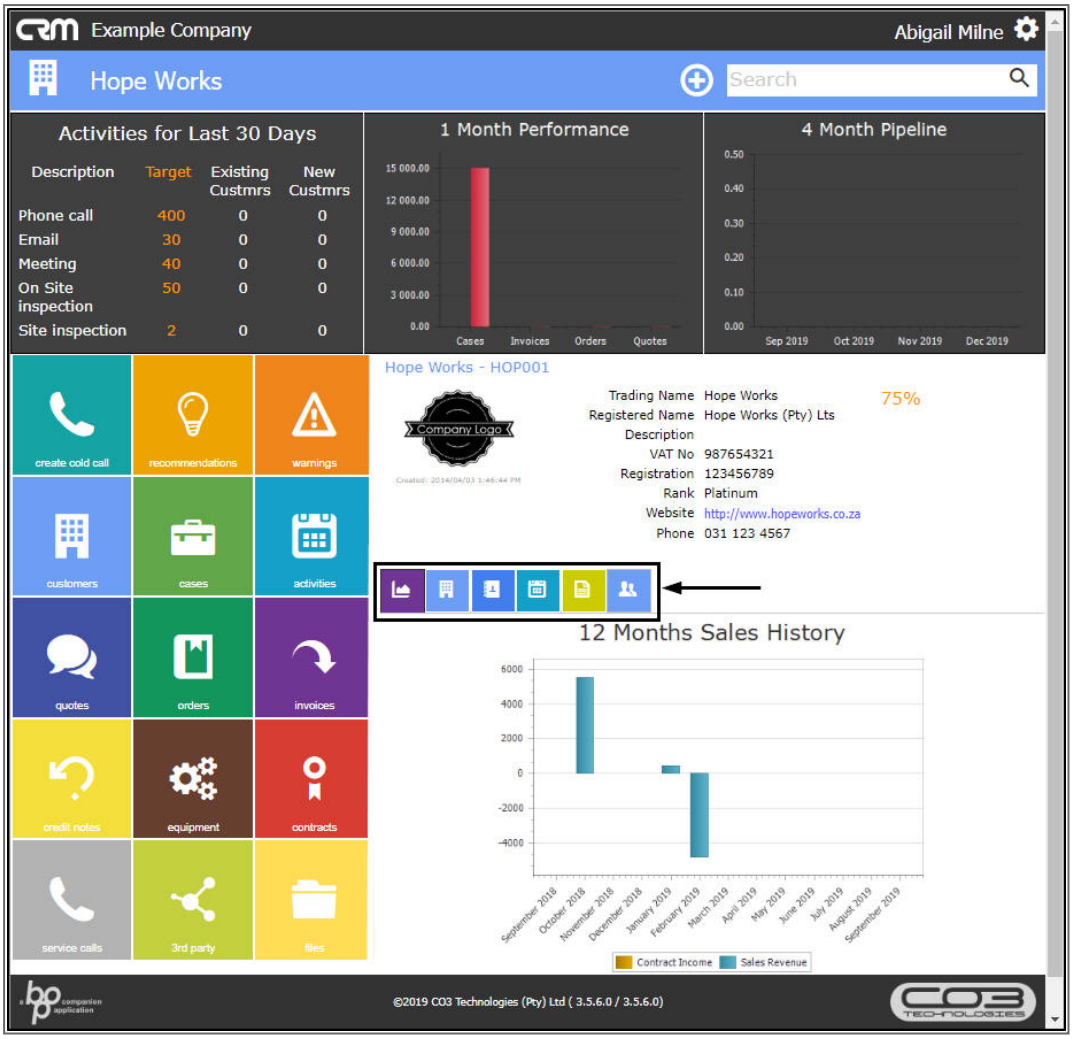

SETTINGS – 'HIDE DASHBOARD PANEL ON CUSTOMER PAGE' CHECKBOX

If you wish to have more space 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.

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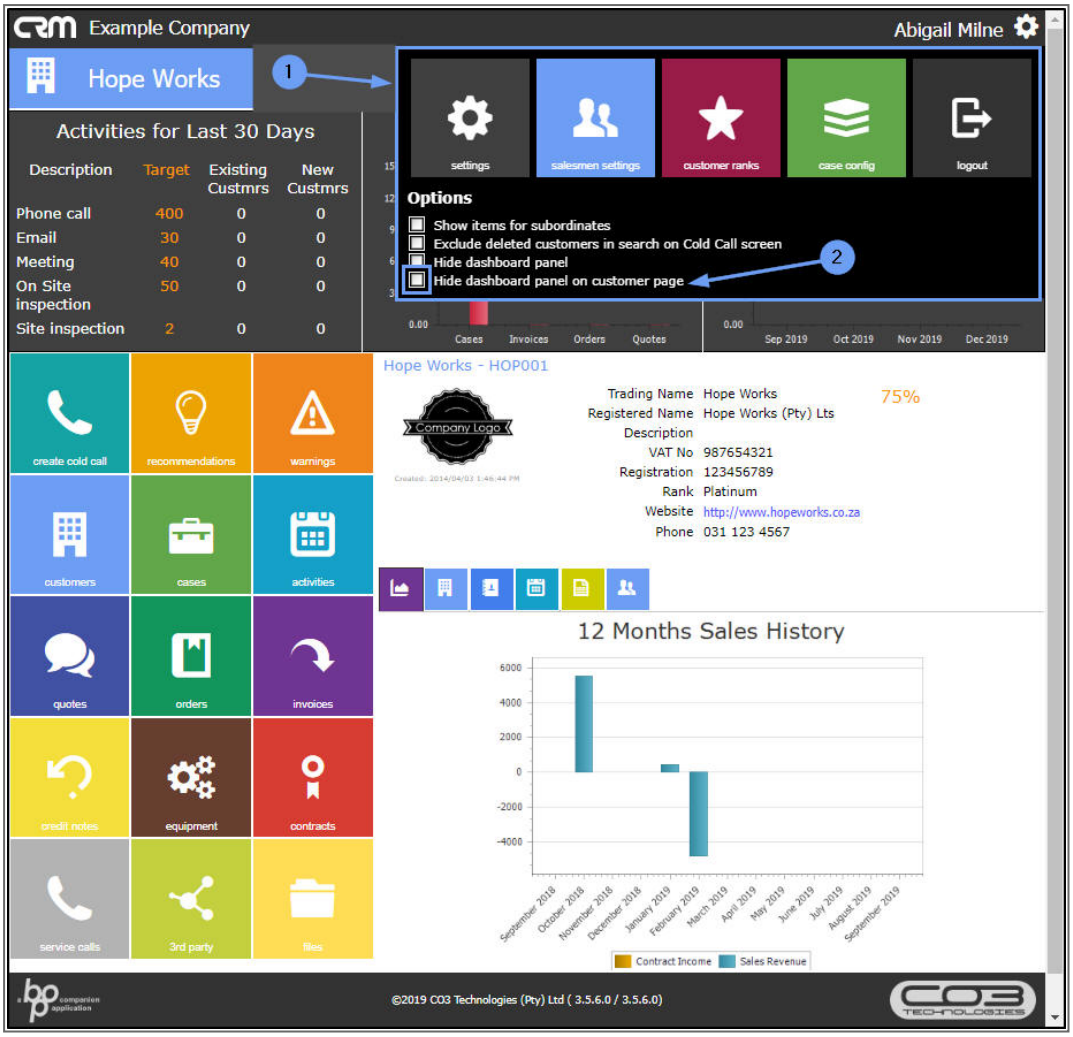

1. As you select the check box,
2. The ***Dashboard panel*** will disappear from the screen.

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- Click outside of the Settings frame to view the full page without the Dashboard.

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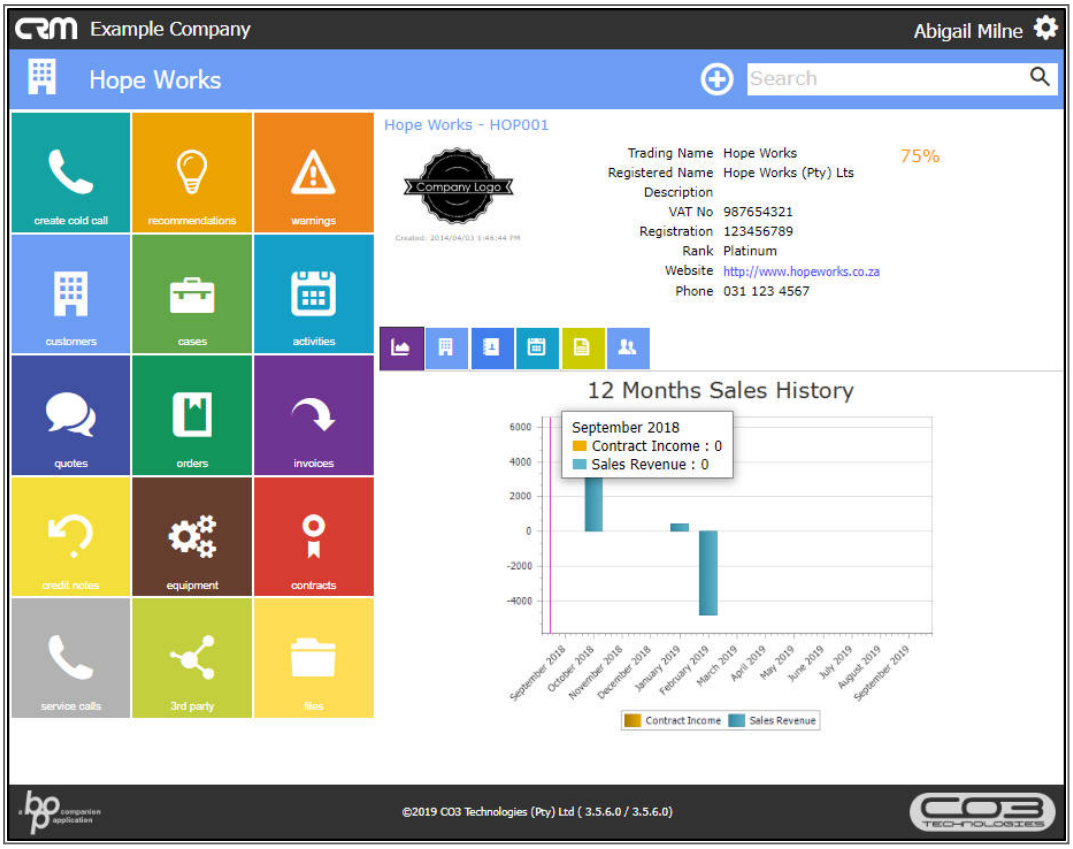

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