

# 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.

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

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### **ACCESS THE** CUSTOMER DASHBOARD

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



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.

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	0210134506		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

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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.

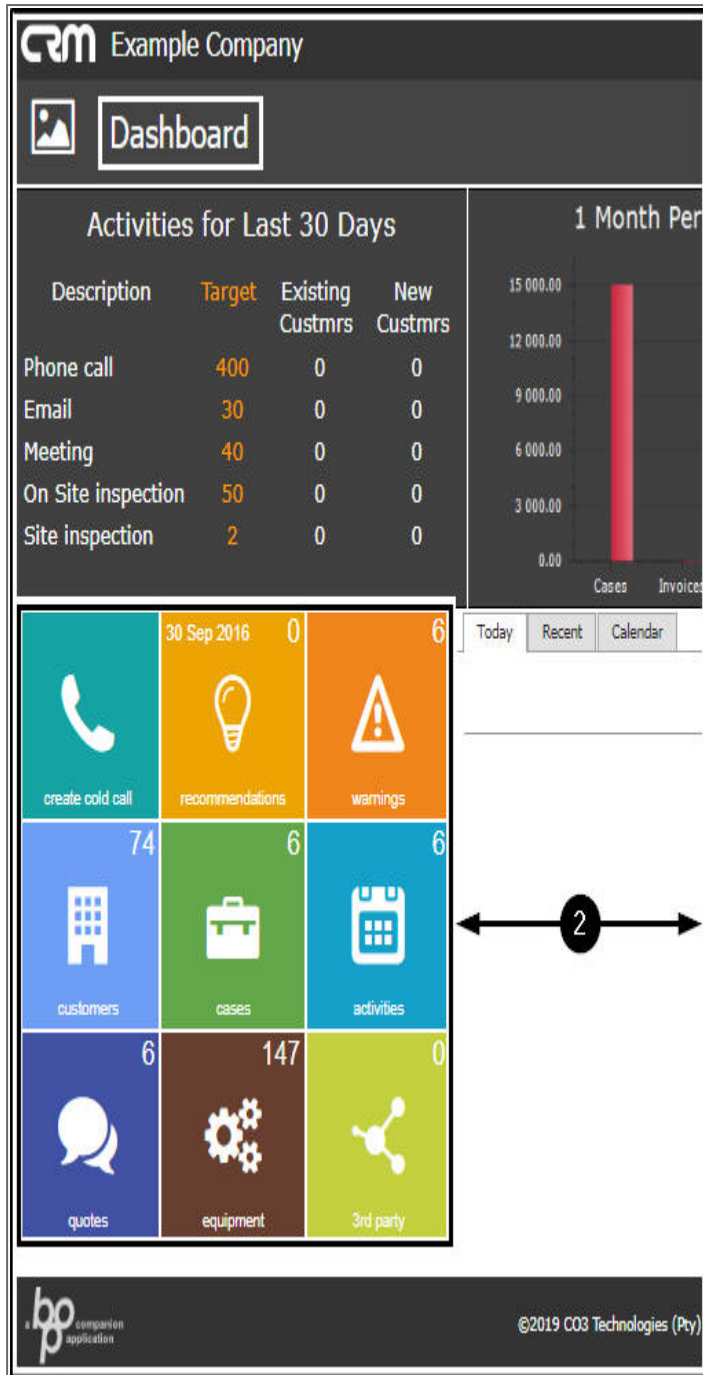


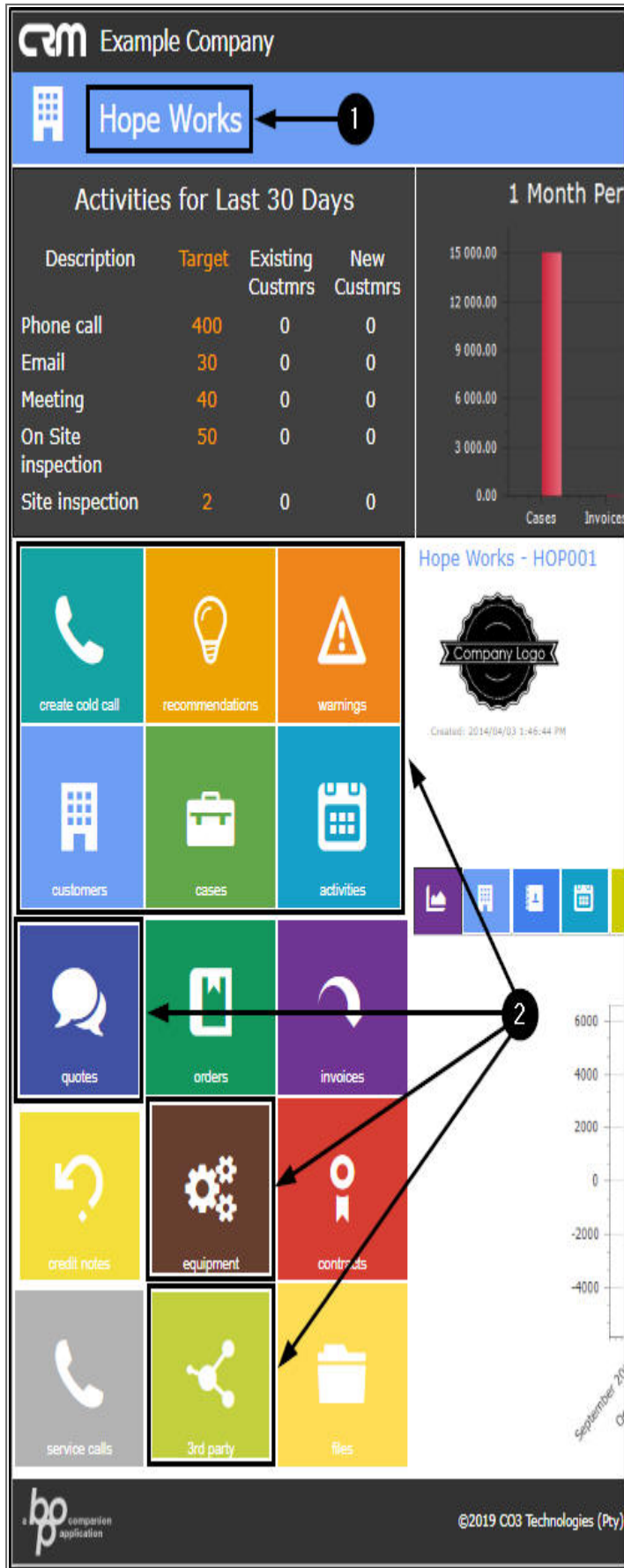
1. In this **Customer Dashboard**,
2. You will find the same tiles that you have available in the **Dashboard** (Home page):

- Create Cold Call
- Recommendations
- Warnings
- Customers
- Cases
- Activities
- Quotes



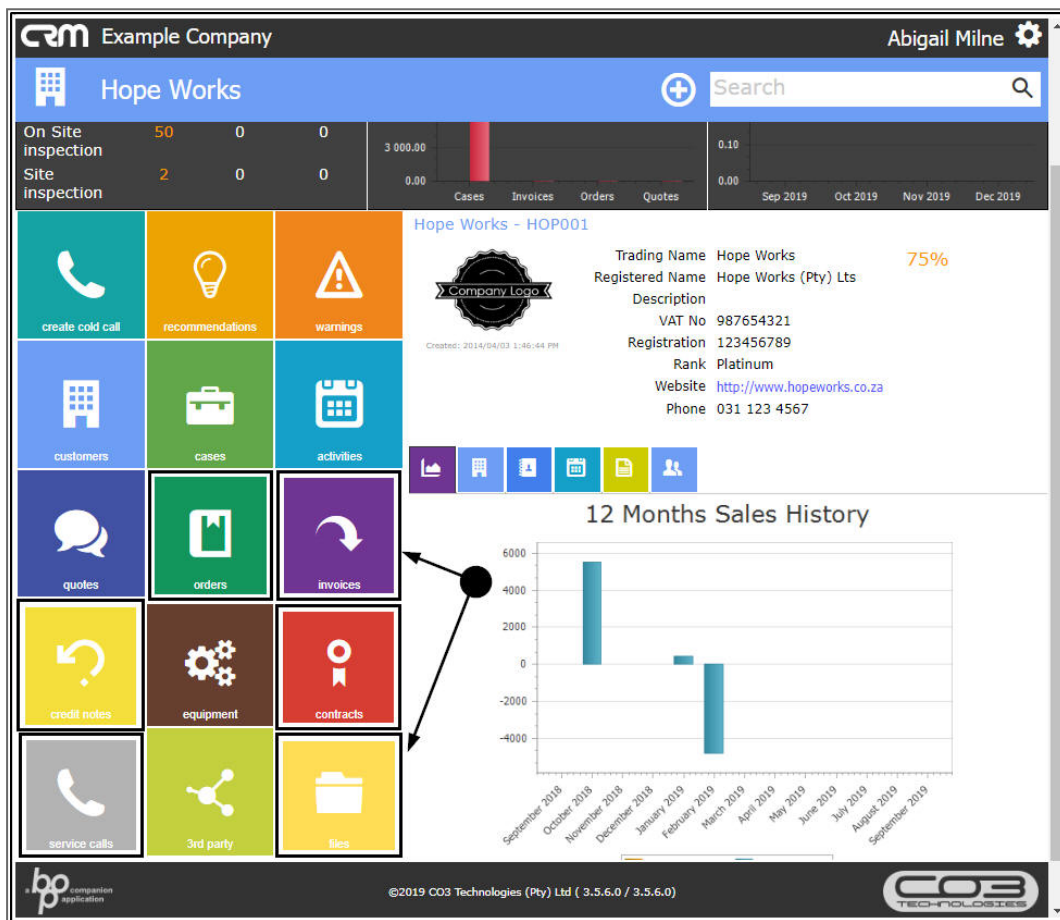
- [Equipment](#)
- [Third Party](#)





- You will also find the following additional Information tiles in this page:

- Orders
- Invoices
- Credit Notes
- Contracts
- Service Calls
- Files



## VIEW CUSTOMER ACTION BUTTONS

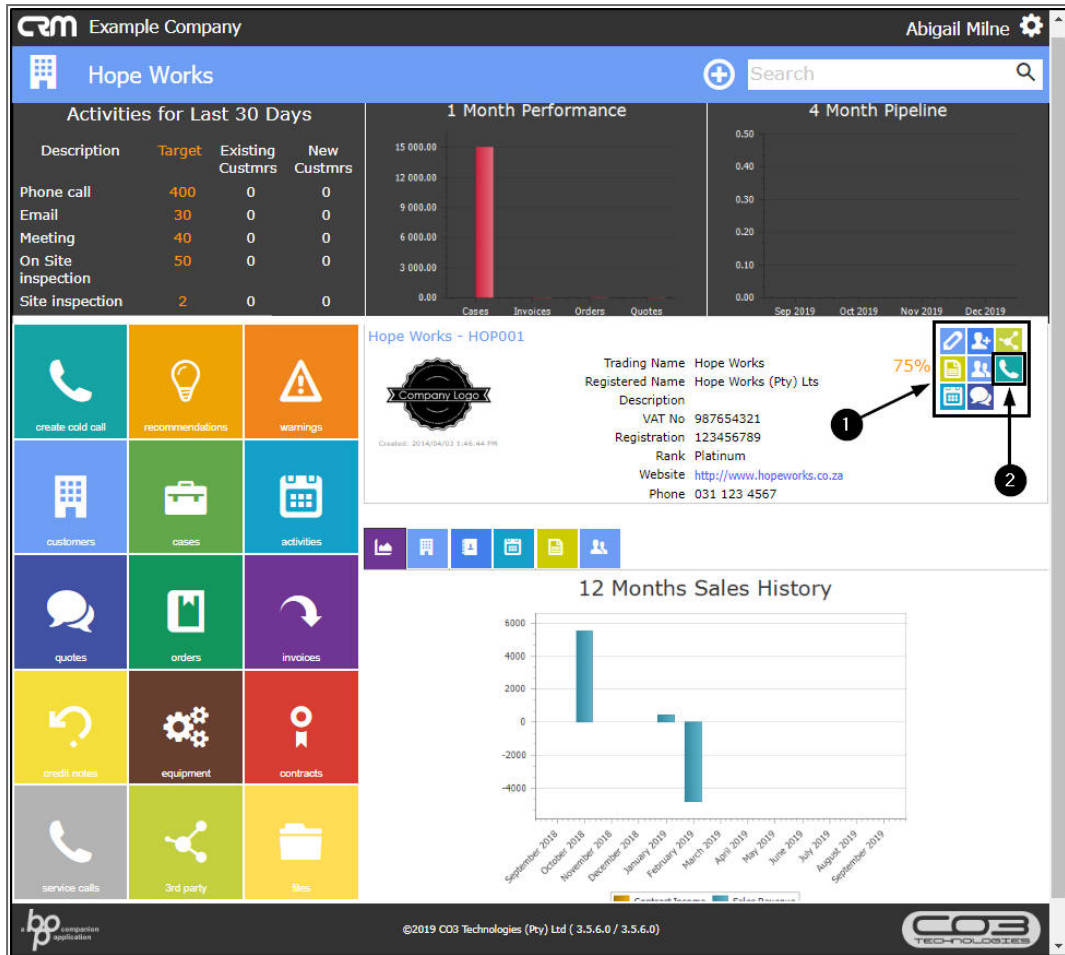
- In the **Customer Dashboard** you can view and access the following information via the customer **Actions buttons**:



**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.



## 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



## 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.



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



The screenshot shows the CO3 CRM interface for a user named Abigail Milne. The dashboard is titled 'Hope Works' and displays various metrics and options.

**Activities for Last 30 Days**

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

**Options**

- ☐ Show items for subordinates
- ☐ Exclude deleted customers in search on Cold Call screen
- ☐ Hide dashboard panel
- ☐ Hide dashboard panel on customer page

**Hope Works - HOP001**

Trading Name: Hope Works  
Registered Name: Hope Works (Pty) Ltd  
Description: VAT No: 987654321  
Registration: 123456789  
Rank: Platinum  
Website: <http://www.hopeworks.co.za>  
Phone: 031 123 4567

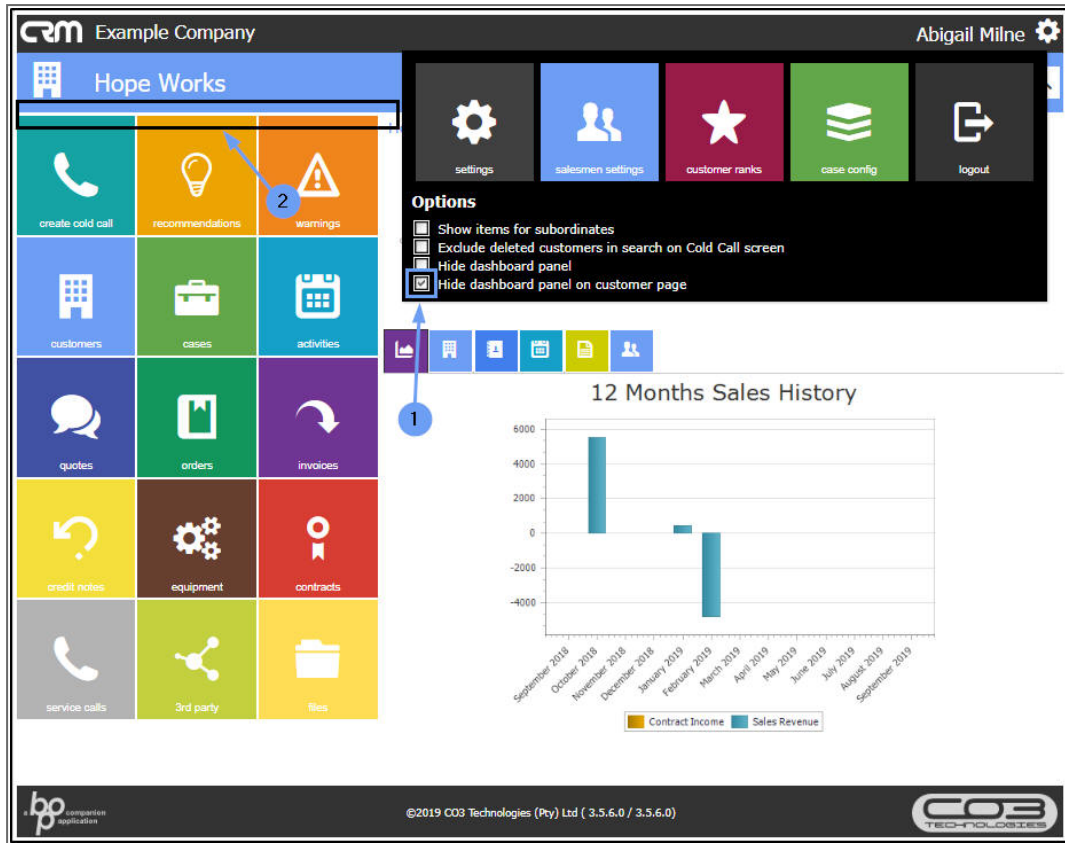
**12 Months Sales History**

The chart shows sales revenue (blue bars) and contract income (yellow bars) from September 2018 to September 2019. The Y-axis ranges from -4000 to 6000. The X-axis shows months from September 2018 to September 2019.

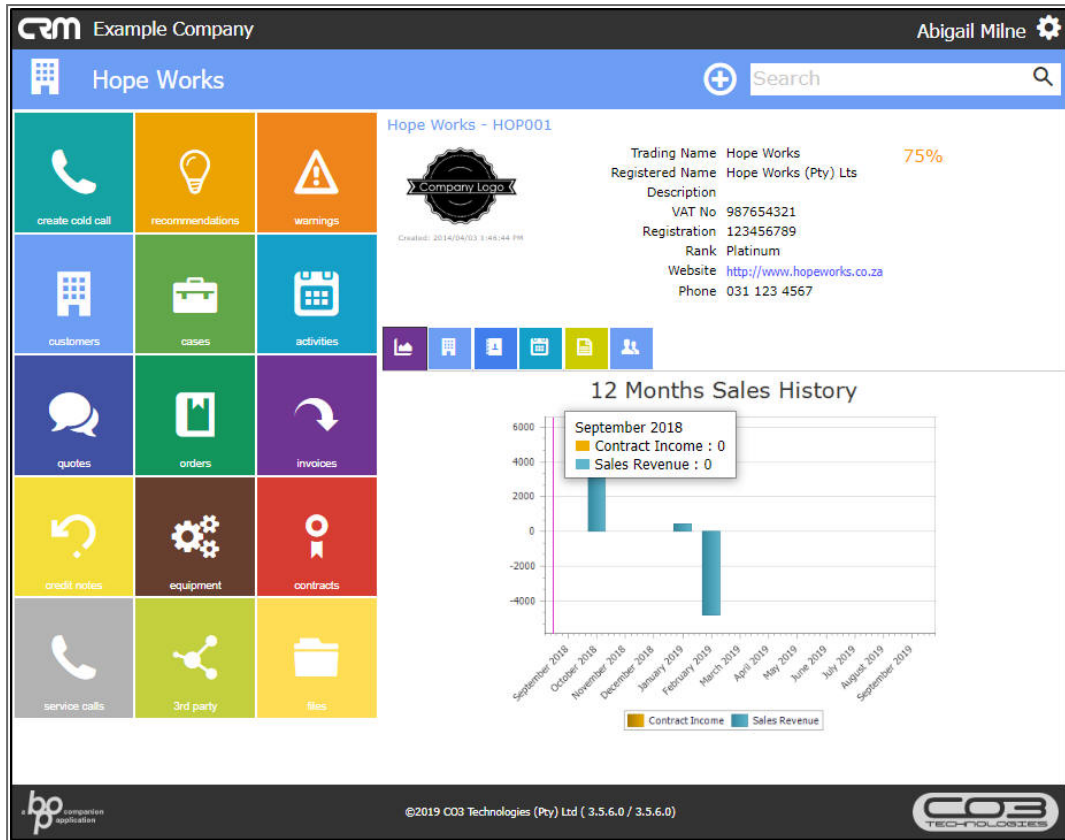
Legend: Contract Income (Yellow), Sales Revenue (Blue)

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



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



CRM.002.001

