

CRM CUSTOMERS

WARNINGS

Warnings are notifications of overdue activities, that can be directly actioned.

A full list of warnings can be accessed from the Dashboard (Home page).

Client-specific warnings can be accessed from the from the <u>Customer</u> Dashboard as set out below.

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

ACCESS WARNINGS FROM THE DASHBOARD (HOME PAGE)

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



Customers Warnings

CCM Example Company					}	Abigail Milne 🍄
🔼 Das	hboard]	-1		Search	Q
Activities for Last 30 Days			ays	1 Month Performance	4 Month Pij	peline
Description Phone call Email Meeting On Site inspection Site inspection	Target 400 120 40 50 2	Existing Custmrs 0 0 0 0 0	New Custmrs 5 2 1 1 0	15 000.00 12 000.00 9 000.00 5 000.00 3 000.00 0.00 Cates Invoices Orders Quotes	6 000.00 5 000.00 3 000.00 2 000.00 1 000.00 0.00 Jul 2019 Aug 2019	Sep 2019 Oct 2019
create cold call 74 Customers 5	30 Sep 2016	0 tions 9 9 147	sclivities	Today Recent Calendar Year Calendar Schedule Date Phone call - King Enterprises: Confirm Manager When: 23 Jul 2019, 17:00-18: Who: Jason King, King Enterprise: Tel: Email: Page 1 of 1 (1 items) C [1] > > Al	e n meeting times with new Pur 00	Status
quotes	equipmen	it .	3rd party	©2019 CO3 Technologies (Pty) Ltd (3.5.6.0 / 3.5.6.0)		

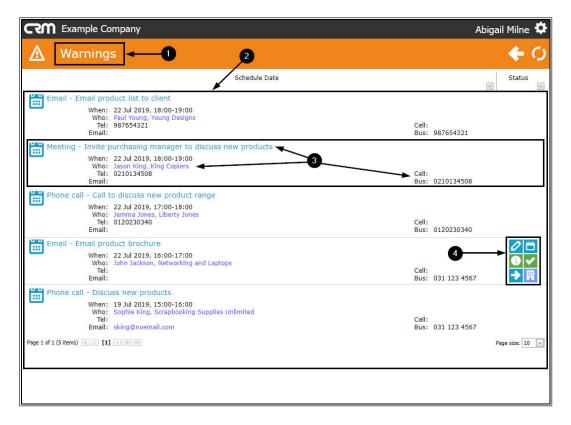
THE WARNINGS SCREEN (ALL CUSTOMERS)

- 1. The *Warnings* page will be displayed.
- 2. Here you can view all the warnings where you have activities pending.
- 3. Each warning lists:
 - The activity *subject*
 - When the activity was scheduled for
 - Who the activity was scheduled with
 - *Contact details* for the activity:
 - Tel:
 - Email:
 - Cell:
 - Business No:



WARNINGS 'ACTION ITEM' BUTTONS

- 4. Hover over any activity to reveal the *Action Item* buttons:
 - View / Edit this Activity
 - Reschedule this Activity
 - View Case info and history
 - Close this case
 - Next Action (close current activity and create new activity)
 - View customer



VIEW ACTIVITY SUMMARY

- 1. *Single click* on any Activity.
- 2. To access a *quick view summary* of the Activity information.



Abigail Mile Marnings Schedule Date Schedule Date Status Email - Email product list to client When: 22 Jul 2019, 18:00-19:00 When: 22 Jul 2019, 18:00-17:00 When: 22 Jul 2019, 15:00-17:00 When: 22 Jul 2019, 15:00-17:00 When: 19 Jul 2019, 15:00-17	CCM Example Company	Abigail Milne 🍄 🕯
 Email - Email product list to client When: 22 Jul 2019, 18:00-19:00 Who: Paul Young, Young Designs Tel: 987654321 Bus: 987654321 Cell: Bus: 0210134508 Cell: Bus: 0120230340 Segments: Client updating machines Comments: Client updating machines Comments: Client updating machines Completion Notes: Email: Bus: 031 123 4567 Phone call - Discuss new products When: 19 Jul 2019, 15:00-16:00 Who: Sophie King, Scapbooking Supplies Unlimited Tel; Cell: Email: Cell: 	A Warnings	€ 0
Image: Entrain product list to cherch When: 22 Jul 2019, 15::00-19::00 When: 22 Jul 2019, 17::00-18::00 When: 22 Jul 2019, 16::00-17::00 Wher: 22 Jul 2019, 16::00-17::00 When: 22 Jul 2019, 16::00-17::00 When: 22 Jul 2019, 16::00-17::00 When: 22 Jul 2019, 15::00-17::00 When: 22 Jul 2019, 15::00-17::00 When: 20 Jul 2019, 15::00-17::00 When: 19 Jul 2019, 15::00-16::00 When: 19 Jul 2019, 15::00-16::00	Schedule Date	Endet second
When: 22 Jul 2019, 18:00-19:00 Who: Jason King, King Copiers Tel: 0210134508 Cell: Bus: 0210134508 Phone call - Call to discuss new product range When: 22 Jul 2019, 17:00-18:00 Who: Jemma Jones, Liberty Jones Tel: 0120230340 Cell: Bus: 0120230340 Where: 22 River House, River Way, River Town, River City, Case: Potential New Deal Completion Notes: Cell: Bus: 0120230340 Email: Cell: Bus: 0120230340 Wher: 22 Jul 2019, 15:00-17:00 Who: John Jackson, Networking and Laptops Tel: Email: Cell: Bus: 031 123 4567 Phone call - Discuss new products When: 19 Jul 2019, 15:00-16:00 Who: Sophie King, Scrapbooking Supplies Unlimited Tel: Cell:	When: 22 Jul 2019, 18:00-19:00 Who: Paul Young, Young Designs Tel: 987654321	
Email - Email product brochure When: 22 Jul 2019, 16:00-17:00 Who: John Jackson, Networking and Laptops Tel: Cell: Email: Bus: 031 123 4567 Phone call - Discuss new products When: 19 Jul 2019, 15:00-16:00 Who: Sophie King, Scrapbooking Supplies Unlimited Tel: Cell:	When: 22 Jul 2019, 18:00-19:00 Who: Jason King, King Copiers Tel: 0210134508	3
Email - Email product brochure When: 22 Jul 2019, 16:00-17:00 Who: John Jackson, Networking and Laptops Tel: Cell: Email: Bus: 031 123 4567 Phone call - Discuss new products When: 19 Jul 2019, 15:00-16:00 Who: Sophie King, Scrapbooking Supplies Unlimited Tel: Cell:	Phone call - Call to discuss new product range When: 22 Jul 2019, 17:00-18:00 Who: Jemma Jones, Liberty Jones Tel: 0120230340 Email: Where: 22 River House, River Way, River Town, River City, Case: Potential New Deal Comments: Client updating machines Completion Notes:	
When: 19 Jul 2019, 15:00-16:00 Who: Sophie King, Scrapbooking Supplies Unlimited Tel: Cell:	Email - Email product brochure When: 22 Jul 2019, 16:00-17:00 Who: John Jackson, Networking and Laptops Tel: Cell:	57
Page 1 of 1 (5 items) @ ([1]) All Page size: 10 🗐	When: 19 Jul 2019, 15:00-16:00 Who: Sophie King, Scrapbooking Supplies Unlimited Tel: Email: sking@noemail.com Bus: 031 123 450	

NAVIGATE TO THE CUSTOMER DASHBOARD

• Click on the blue link in the *Who* field of any of the Activities.



CCM Example Company	Abigail I	Milne	\$	*
A Warnings		(Ċ	
Schedule Date	*	Status	*	
Email - Email product list to client When: 22 Jul 2019, 18:00-19:00 Who: Paul Young, Young Designs Tel: 98/7654321 Email: Bus: 98/76543	21			
Meeting - Invite purchasing manager to discuss new products When: 22 Jul 2019, 18:00-19:00 Who: Jason King, King Copiers Tel: 0210134508 Email: Bus: 0210134 Phone call - Call to discuss new product range	508			
When: 22 Jul 2019, 17:00-18:00 Who: Jemma Jones, Liberty Jones Tel: 0120230340 Email: Bus: 0120230	340			
Email - Email product brochure When: 22 Jul 2019, 16:00-17:00 Who: John Jackson, Networking and Laptops Tel: Email: Cell: Bus: 031 123	4567	 ✓ ✓		
Phone call - Discuss new products When: 19 Jul 2019, 15:00-16:00 Who: Sophie King, Scrapbooking Supplies Unlimited Tel: Email: sking@noemail.com Page 1 of 1 (5 items) @ < [1] > >> At		size: 10	~	

- 1. The selected *Customer Dashboard* screen will be displayed.
- Here you can view the *Customer/Company details* and *12 Months* Sales History.
- 3. A panel of *Links* tiles can direct you to further information regarding this customer.

ACCESS WARNINGS FROM THE CUSTOMER DASHBOARD

4. Click on the *Warnings* tile.



Customers Warnings

CCM Example Company Abigail Milne 🌣 着							
Image: Networking and Laptops Image: Search Image: Search </td							
Activi	ties for La	st 30 Da	ys	1 Month Performance		4 Mo	nth Pipeline
Description		Existing Custmrs	New Custmrs	15 000.00		6 000.00	
Phone call				9 000.00		4 000.00	
Email			2	6 000.00		3 000.00	
Meeting	40 on 50	0 0				2 000.00	
On Site inspection	on 50 2	0	1 0	3 000.00		1 000.00	
Site inspection		v	v	0.00 Cases Invoices	Orders Ouotes	0.00	Aug 2019 Sep 2019 Oct 2019
create cold cull create cold cull cultomens Ques	ecommendations	verni activi			Trading Name Networkir istered Name Networkir Description VAT No 12345676 Registration 98765433 Rank Metal Website http://www Phone 031 123 4	ang and Laptops	2
quotes	orders	invoir	*	0.5 0.45 0.4 0.35	12 Months S	ales History	
redit notes	¢¢	contra		3 0.3 0.25 0.2 0.15 0.1			
Service calls	Kan			0.05 0 	12 - 42 Qu - 4	Siles Revenue	
				©2019 CO3 Technologies (Pty) Ltc			

- 1. The *customer specific* warning screen will be displayed.
- 2. Here you can only view the warnings for that particular customer.
 - Follow the steps as explained above to reveal the warnings action buttons or view the activity summary.
- 3. Click on *Back* to return to the previous page.
- 4. Click on the *Customer icon* to return to the Customer page.



CCM Example Company	Abigail Milne 🍄
Marnings for Networking and Laptops	3
Schedule Date	Status
Email - Email product brochure When: 22 Jul 2019, 16:00-17:00 Who: John Jackson, Networking and Laptops Tel: Email: Page 1 of 1 (1 Heme) @ [1] > D #	Cell: Bus: 031 123 4567 Page size: 10 🗸
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