

CRM CUSTOMERS

CASES

A Case is like an opportunity: a reason to engage with a client in order to fulfill a sale requirement or propose a deal. A case gives rise to a **Quote** and subsequent New Deal.

A Case can be viewed as an umbrella over all the underlying Activities that work towards achieving a contract with that customer.

There is certain criteria required when dealing with Cases:

- A **Customer** is required in order to create a Case.
- A Case is required to raise an **Activity**.
- Only one Activity per Case can be open at a time.

Customer-specific Cases can be accessed from the **Customer Dashboard** (Customer Home page) as set out below.

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

CRM will prompt you to create a new Case, when **raising a new activity** for a customer.

Quotes can be added to a Case from the **Cases for [selected customer]** listing page when using the following **Action** buttons:

- **View Case Info and History**
- **View/Edit this Case**
- **New Activity**
- **New Quote**

Ribbon Access: Webpage > [http://\[servername\]:\[port-](http://[servername]:[port-)

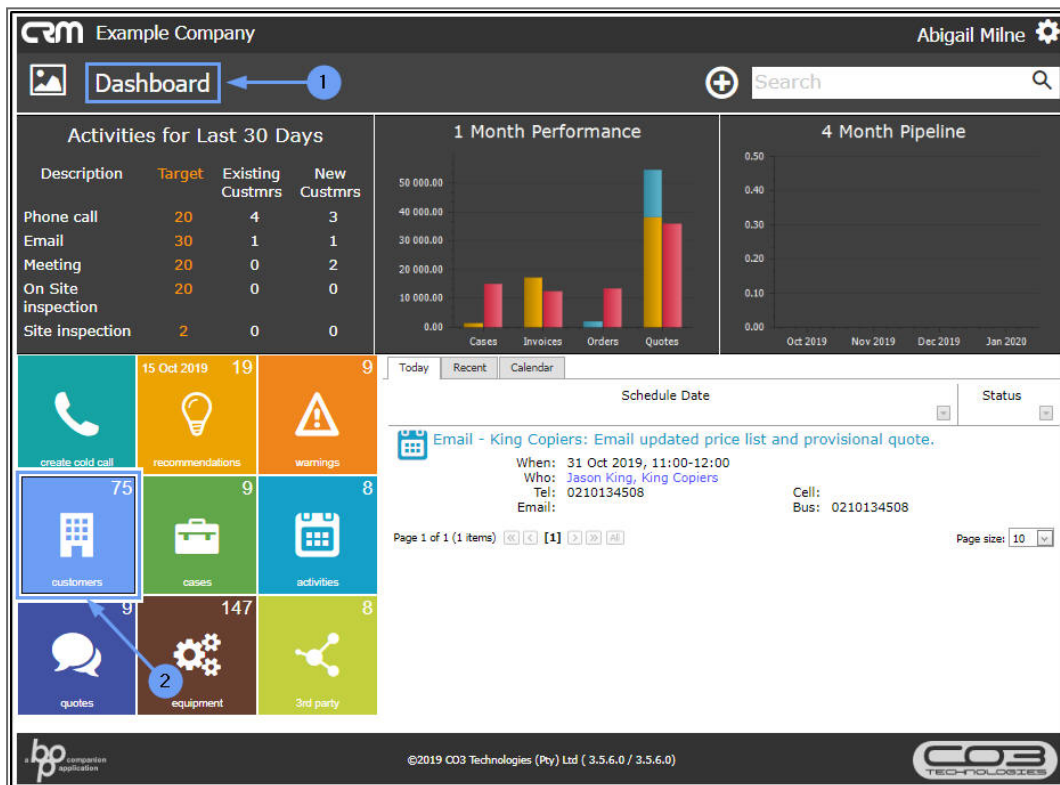
no]/BPOCRM/User.aspx

VIEW CUSTOMER SPECIFIC CASE LIST

from the **Customer Dashboard** (Home page)

To access a customer specific list of Cases from the **Customer Dashboard** (Customer Home page). You will first need to navigate to the specific Customer Home page).

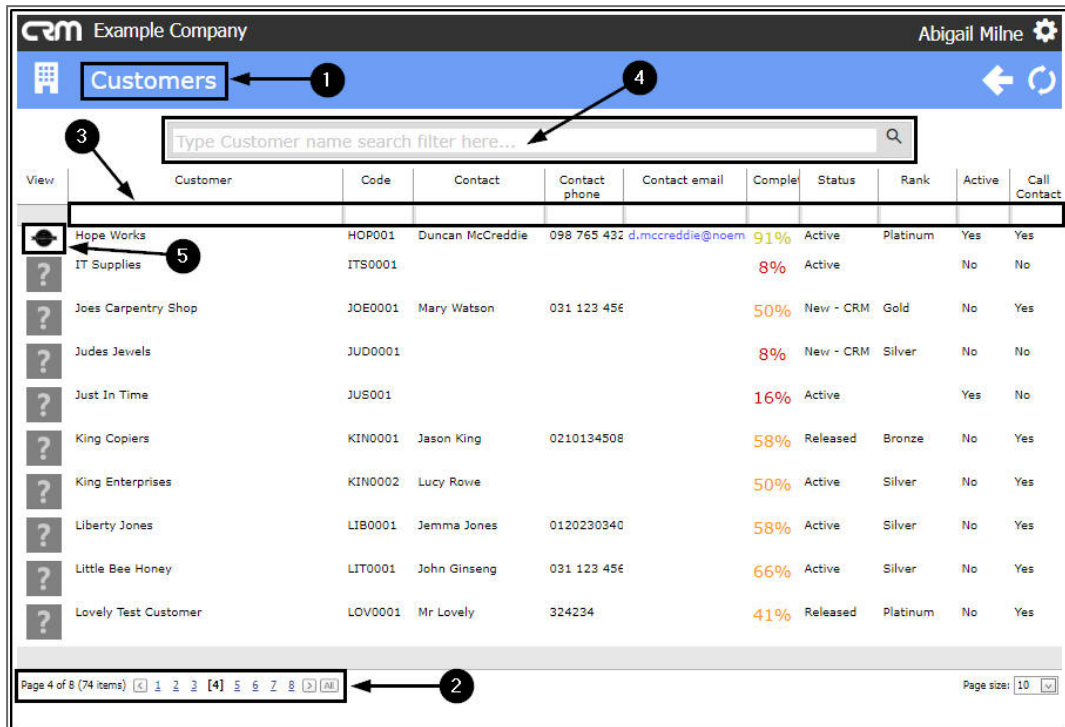
1. In the **Dashboard** (Home page),
2. Click on the **Customers** tile.



The screenshot shows the CO3 CRM Customer Dashboard for 'Example Company'. The user 'Abigail Milne' is logged in. The dashboard includes a 'Dashboard' tab (highlighted with a blue circle and arrow labeled '1'), a search bar, and several performance charts. Below the charts is a grid of tiles. The 'customers' tile (blue with a building icon and the number 75) is highlighted with a blue circle and arrow labeled '2'. Other tiles include 'create cold call', 'recommendations', 'warnings', 'cases', 'activities', 'quotes', 'equipment', and '3rd party'. The bottom of the dashboard shows a calendar view for 'Email - King Copiers' and a footer with the CO3 Technologies logo and version information.

1. The **Customers** listing page will open.
2. You can use the **Page Reference field** ,
3. the **Filter Row** or the

4. **Filter Text Box** to search for a specific customer.
5. Click on the selected customer icon in the **View** column.



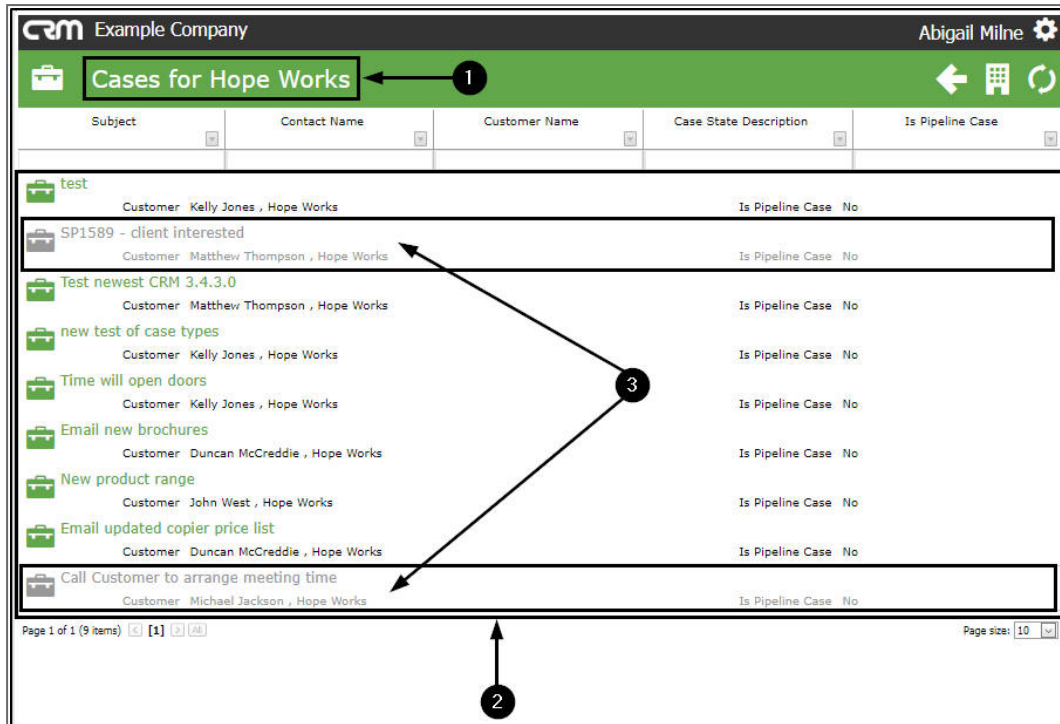
The screenshot shows the CRM interface for 'Example Company' with user 'Abigail Milne'. The 'Customers' tab is selected. A search filter is present at the top. A table lists customer records with columns: View, Customer, Code, Contact, Contact phone, Contact email, Comple, Status, Rank, Active, and Call Contact. The 'IT Supplies' customer is highlighted. At the bottom, a pagination bar shows 'Page 4 of 8 (74 items)' and a 'Page size' dropdown set to 10.

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	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	031 123 456		66%	Active	Silver	No	Yes
	Lovely Test Customer	LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes

1. The selected **Customer Dashboard** (Customer Home page) will open.
2. Click on the **Cases** tile.



1. The **Cases for [selected customer]** page will open.
2. A list of cases pertaining to that customer will display.
3. Any **closed** Cases in this list will be greyed out.



VIEW CASE ACTION BUTTONS

1. Hover over any open Case to reveal the **Action** buttons:

- View / Edit this Case
- View Case info and history
- New Activity
- Close this case
- Won this Case
- Lost this Case
- New Quote

VIEW CASE SUMMARY

2. **Single click** on any Case to access a **Summary** of the Case information and if it is an open case, this will also cause the the **Action buttons** to be displayed. \ (Closed cases will only display the Summary.)

CRM Example Company

Abigail Milne

Cases for Hope Works

Subject	Contact Name	Customer Name	Case State Description	Is Pipeline Case
test	Customer: Kelly Jones, Hope Works		Is Pipeline Case: No	
SP1589 - client interested	Customer: Matthew Thompson, Hope Works		Is Pipeline Case: No	
Test newest CRM 3.4.3.0	Customer: Matthew Thompson, Hope Works		Is Pipeline Case: No	
new test of case types	Customer: Kelly Jones, Hope Works		Is Pipeline Case: No	
Time will open doors	Customer: Kelly Jones, Hope Works		Is Pipeline Case: No	
Email new brochures	Customer: Duncan McCreddie, Hope Works		Is Pipeline Case: No	
New product range	Customer: John West, Hope Works		Is Pipeline Case: No	
Email updated copier price list	Customer: Duncan McCreddie, Hope Works		Is Pipeline Case: No	
Call Customer to arrange meeting time	Customer: Michael Jackson, Hope Works		Is Pipeline Case: No	

1

2

Case

Value

Relative Value

Case Date

October 2019 Price List

20000.00

4000.00

10 Oct 2019

Case State

Percentage

Expected Completion

Interested

20.00 %

17 Oct 2019

Page 1 of 1 (9 items)

1

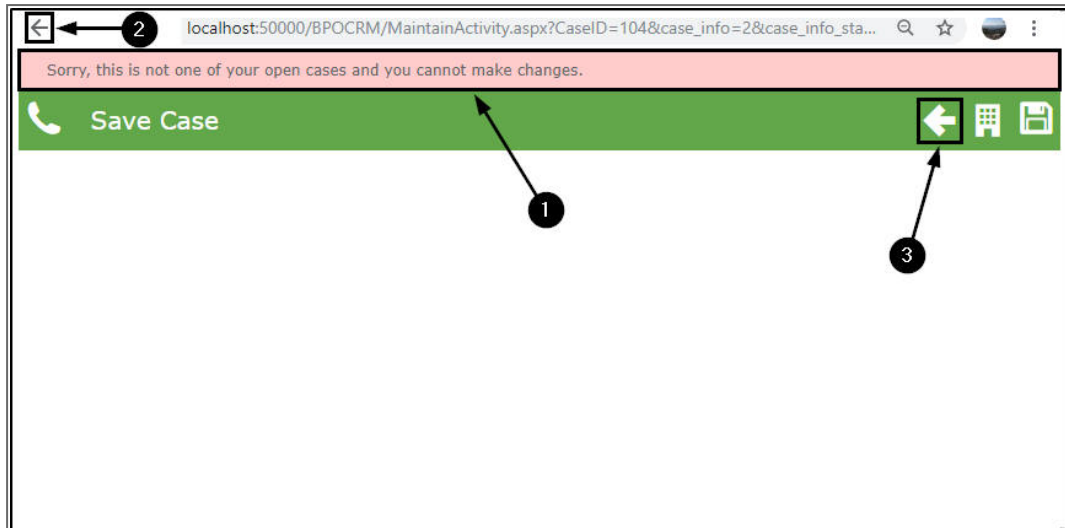
2

148

Page size: 10

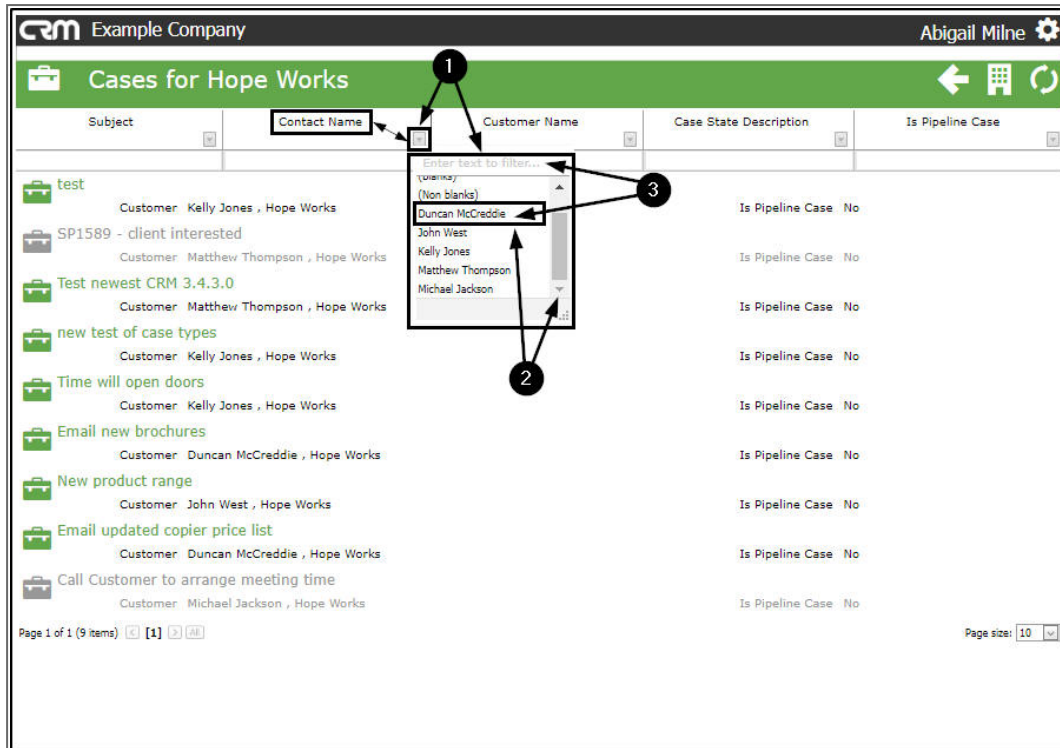
ON CASES WHERE YOU ARE NOT THE SALESMAN

1. If you try and use the Action buttons for a Customer that is linked to another Salesman, then an error message will appear at the top of the page:
 - ***Sorry, this is not one of your open cases and you cannot make changes.***
2. Click on the **Back** arrow or
3. The **Back** button to return to the **Cases for [selected customer]** page.



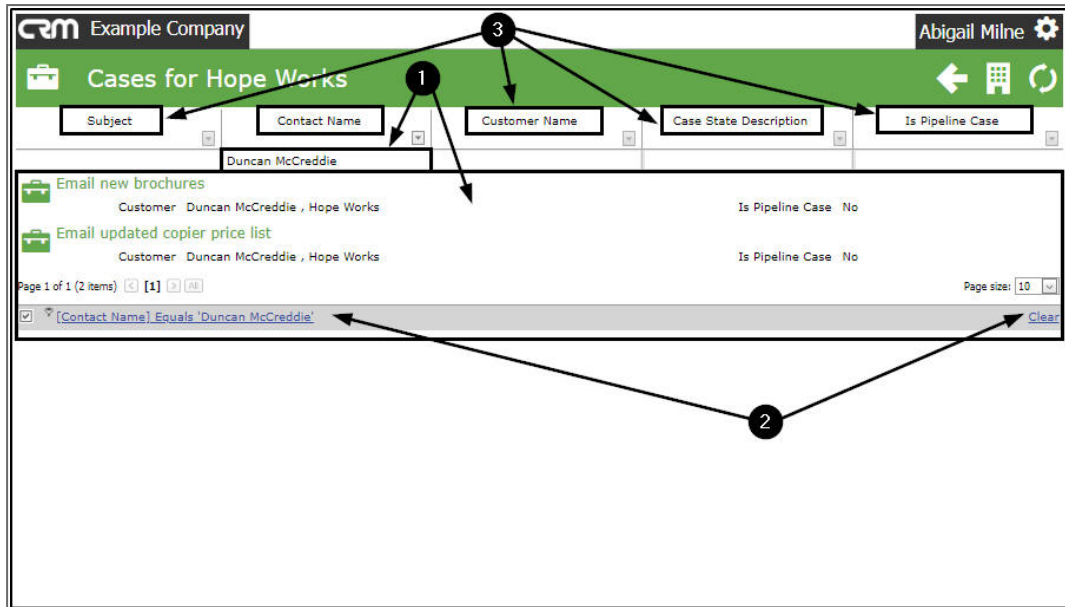
SEARCH FOR CASES USING THE FILTER ROW AND FILTER LIST FUNCTIONALITY

1. You can click on a **filter arrow** to display the applicable drop-down menu.
 - In this example, the selected filter arrow is in the **Contact Name** column, therefore the menu displayed will list all the contact names linked to your cases.
2. Either **scroll** through the list to find the relevant contact name from the menu.
3. Or use the **filter box** to type in the relevant contact name, the system will search for the name as you type. Click on the name.



1. The **Cases for [selected customer]** page will now list only the cases linked to this contact name.
2. The **filter row** will display the filter sequence. You can click on **Clear** to remove any filter(s). The page will then display all the Cases linked to the customer again.
3. You can search for specific cases in this way using any of the columns:
 - **Subject**
 - **Customer Name**
 - **Case State Description**
 - **Is Pipeline Case**

and a combination of columns if required e.g. **Customer Name** and **Case Description**.

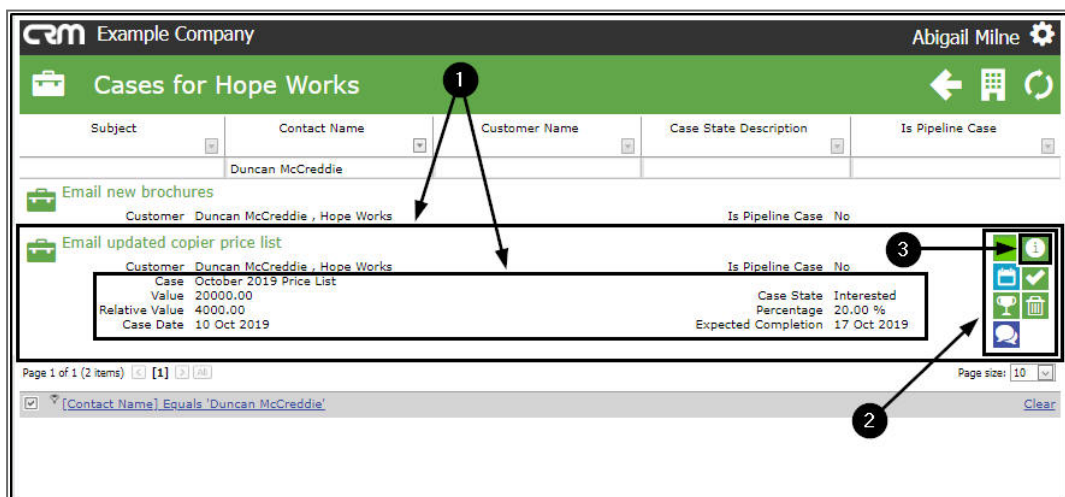


1. **Single click** on an open Case in this page to display the **summary** of the Case information and to reveal the
2. **Action Item** buttons:

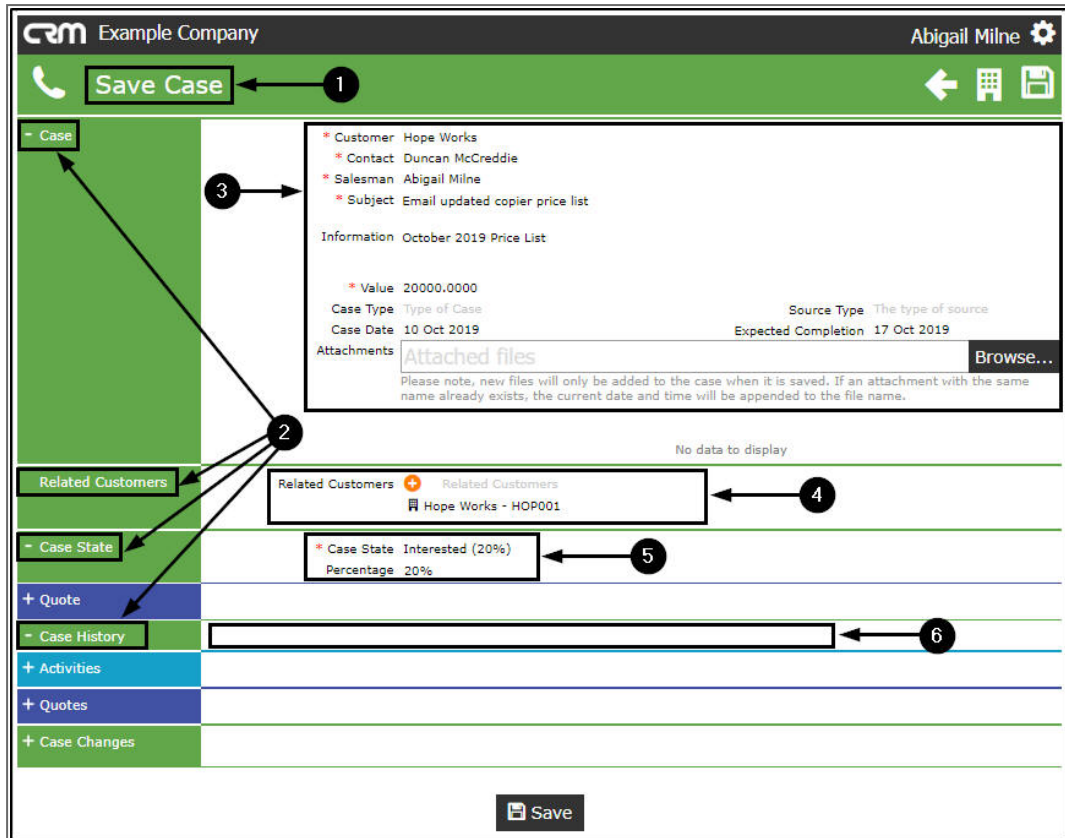
CASES – ACTION BUTTONS

VIEW CASE INFORMATION AND HISTORY

3. Click on the **View Case Info and History** icon.



1. The **Save Case** page will be displayed.
2. The following frames will be auto-expanded:
3. **Case**
 - You will note that the **case details** are auto populated. You can edit all these details, except for the Customer, Salesman, Subject and Information fields.
4. **Related Customers**
 - You will note that the Customer Name will be auto populated, you can **add more Related Customers**, if required.
5. **Case State**
 - The Case State and Percentage will be auto populated. You can **edit the Case State**, if required (which will update the Percentage).
6. **Case History**
 - Here you can view previous activities, quotes and changes on this case, if applicable.



The screenshot shows a CRM interface for 'Example Company' with a user 'Abigail Milne'. The main form is titled 'Save Case' and contains the following fields:

- Customer:** Hope Works
- Contact:** Duncan McCreddie
- Salesman:** Abigail Milne
- Subject:** Email updated copier price list
- Information:** October 2019 Price List
- Value:** 20000.0000
- Case Type:** Type of Case
- Case Date:** 10 Oct 2019
- Source Type:** The type of source
- Expected Completion:** 17 Oct 2019
- Attachments:** Attached files (with a 'Browse...' button)

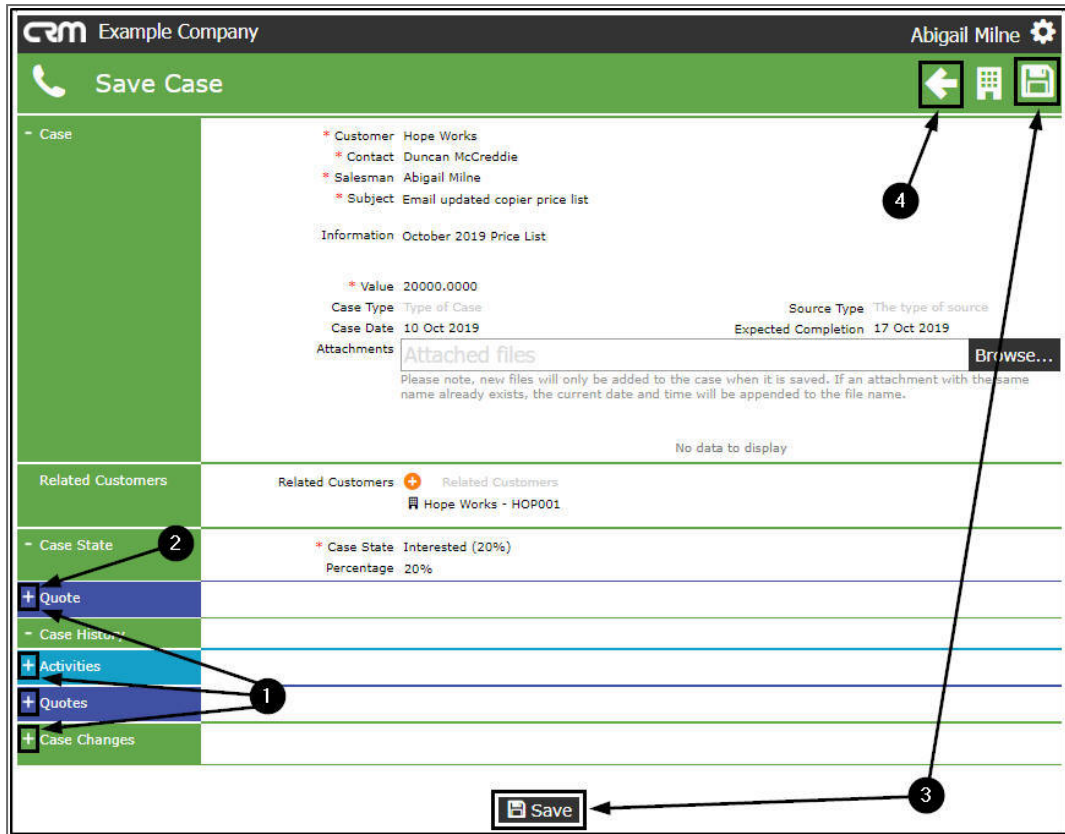
Below the main form, there are several sections:

- Related Customers:** A section with a 'No data to display' message and a list of related customers (e.g., Hope Works - HOP001).
- Case State:** A section showing the current state as 'Interested (20%)' with a 'Percentage: 20%'.
- Case History:** A section with a 'No data to display' message.
- Activities:** A section with a 'No data to display' message.
- Quotes:** A section with a 'No data to display' message.
- Case Changes:** A section with a 'No data to display' message.

Numbered callouts indicate the following actions:

- Click on the **Save Case** button.
- Click on the **Case** tab in the left sidebar.
- Click on the **Related Customers** section.
- Click on the **Case State** section.
- Click on the **Case History** section.
- Click on the **Activities** section.

1. Click on the **expand** icon in any of the collapsed frames to **view** and/or **add** or **edit** the content, if required.
2. In this page, you can link a **Quote** to this Case. Refer to **Add a new Quote linked to this Case** for more information.
3. Click on **Save** to apply any changes.
4. Click on the **Back** button to return to the **My Cases** page.



CRM Example Company | Abigail Milne

Save Case

Case Details:

- * Customer: Hope Works
- * Contact: Duncan McCreddie
- * Salesman: Abigail Milne
- * Subject: Email updated copier price list
- Information: October 2019 Price List
- * Value: 20000.0000
- Case Type: Type of Case
- Case Date: 10 Oct 2019
- Source Type: The type of source
- Expected Completion: 17 Oct 2019

Attachments: Attached files Browse...

Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

Related Customers: No data to display

Case State: Interested (20%)

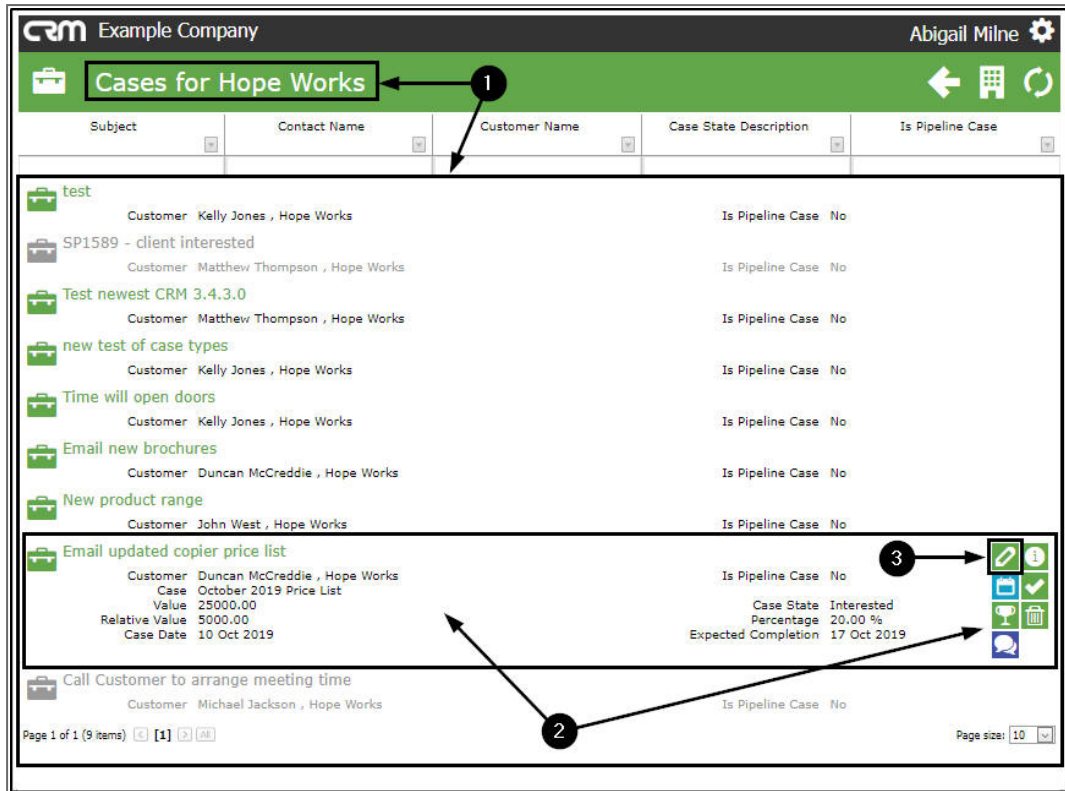
Case History:

- + Quote
- + Activities
- + Quotes
- + Case Changes

Save

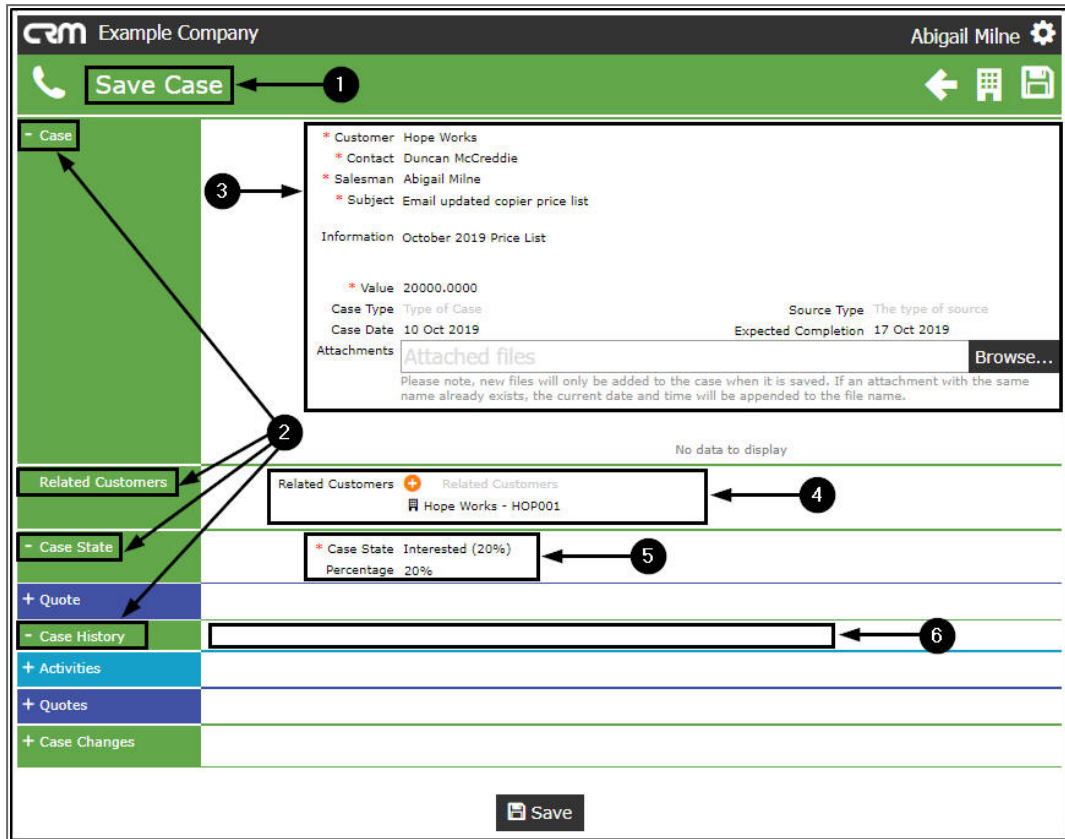
VIEW / EDIT THIS CASE

1. After clicking on **Save** or **Back**, you will return to the **Cases for [selected customer]** page but the page will no longer be filtered, all the Cases linked to the selected customer will again be displayed.
2. Hover anywhere over an open Case to display the **Action Items** buttons.
3. Click on the **View/Edit this Case** icon.



1. The **Save Case** page will be displayed.
2. The following frames will be auto-expanded:
 3. **Case**
 - You will note that the **case details** are auto populated. You can edit all these details, except for the Customer, Salesman, Subject and Information fields.
 4. **Related Customers**
 - You will note that the Customer Name will be auto populated, you can **add more Related Customers**, if required.
 5. **Case State**
 - The Case State and Percentage will be auto populated. You can **edit the Case State**, if required (which will update the Percentage).
 6. **Case History**

- Here you can view previous activities, quotes and changes on this case, if applicable.



CRM Example Company Abigail Milne

Save Case 1

Case 2

3

* Customer: Hope Works
 * Contact: Duncan McCreddie
 * Salesman: Abigail Milne
 * Subject: Email updated copier price list

Information: October 2019 Price List

* Value: 20000.0000
 Case Type: Type of Case
 Case Date: 10 Oct 2019
 Source Type: The type of source
 Expected Completion: 17 Oct 2019

Attachments: Attached files Browse...
 Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

No data to display

Related Customers 4

Related Customers
 Hope Works - HOP001

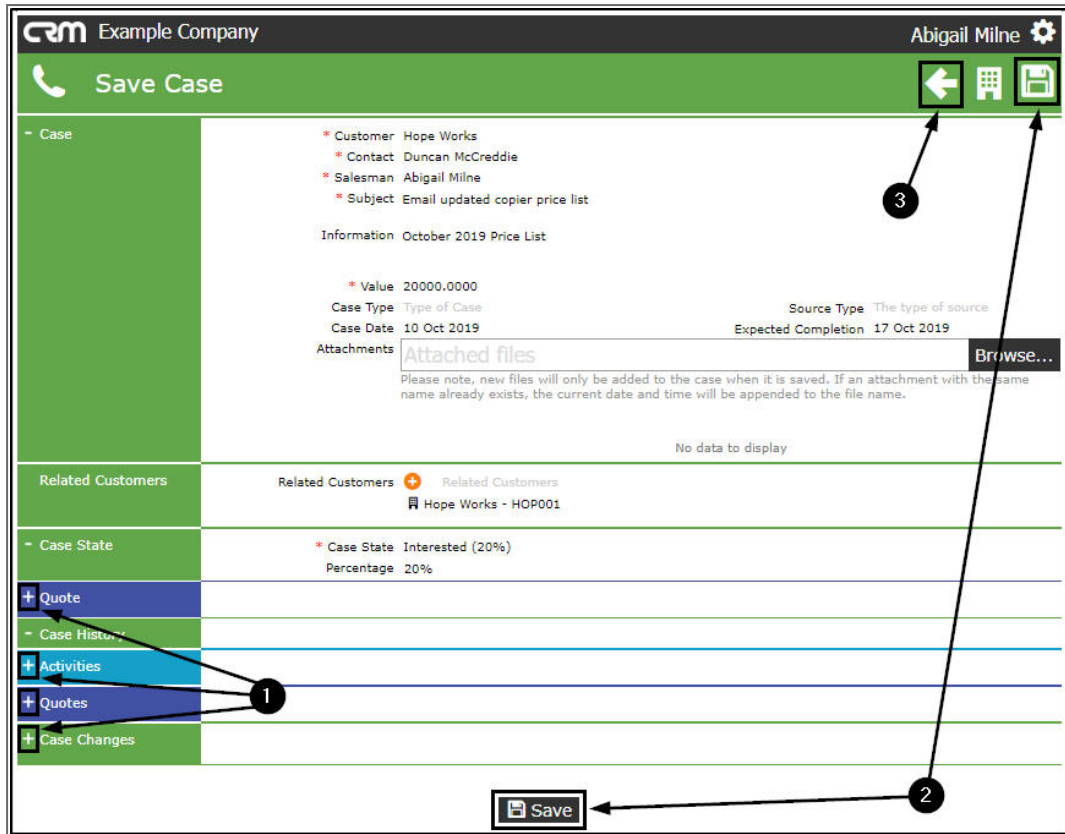
Case State 5

* Case State: Interested (20%)
 Percentage: 20%

Case History 6

Save

1. Click on the **expand** icon in any of the collapsed frames to **view** and/or **edit** the content, if required.
2. Click on **Save** to apply any changes or
3. Click on the **Back** button to return to the previous page.



CRM Example Company

Abigail Milne

Save Case

← [Grid Icon] [Save Icon]

3

* Customer: Hope Works
 * Contact: Duncan McCreddie
 * Salesman: Abigail Milne
 * Subject: Email updated copier price list

Information: October 2019 Price List

* Value: 20000.0000

Case Type: Type of Case Source Type: The type of source
 Case Date: 10 Oct 2019 Expected Completion: 17 Oct 2019

Attachments: Attached files Browse...
 Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

No data to display

Related Customers: Related Customers
 Hope Works - HOP001

- Case State: * Case State: Interested (20%)
 Percentage: 20%

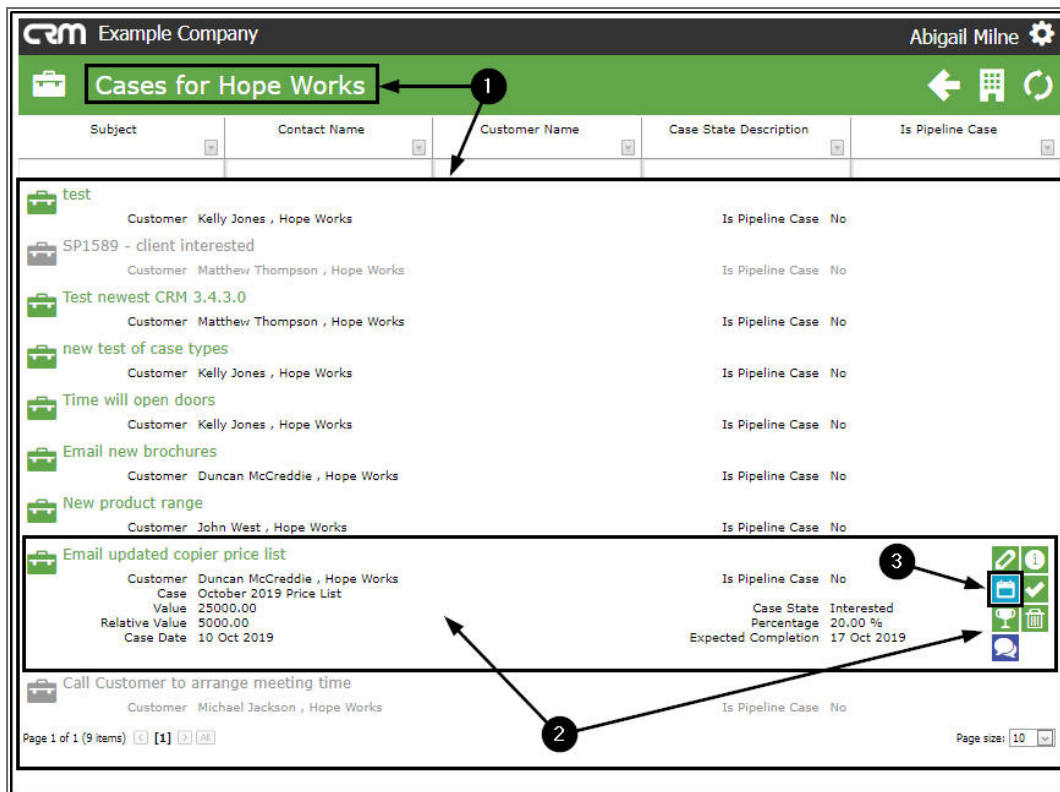
+ Quote
 - Case History
 + Activities
 + Quotes
 + Case Changes

1

2 Save

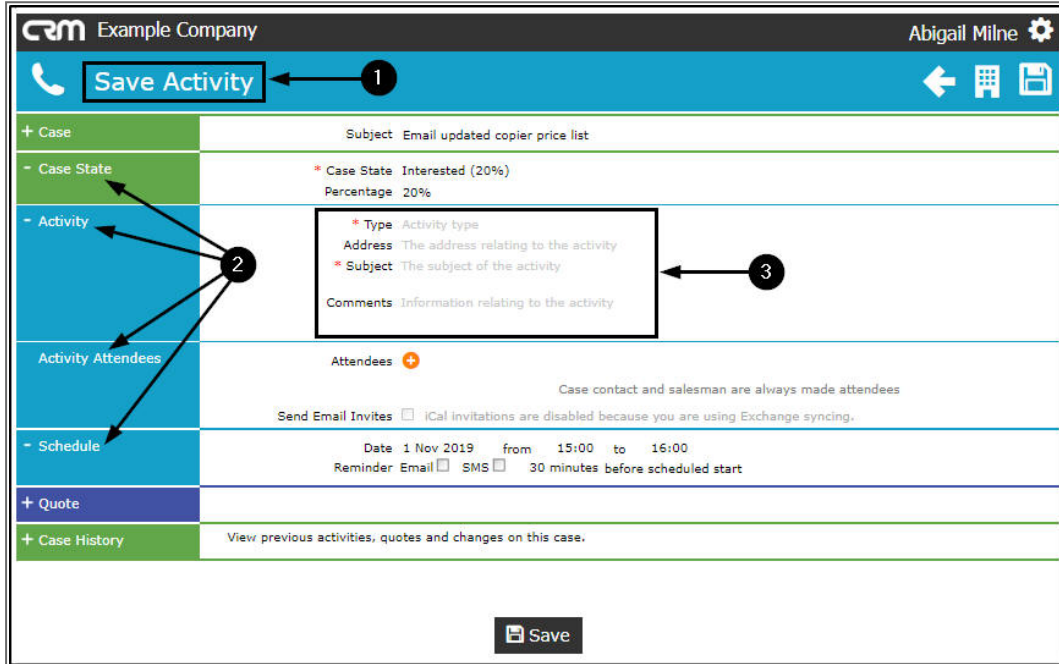
NEW ACTIVITY

1. In the **Cases for [selected customer]** page,
2. Hover anywhere over an open Case to display the **Action Items** buttons.
3. Click on the **New Activity** icon.



1. The **Save Activity** page will be displayed.
2. The following frames will be auto-expanded:
 - **Case State**
 - **Activity**
 - **Activity Attendees** and
 - **Schedule**
3. Update the Activity Information:
 - **Type:**
 - Click in the **Type** field to display an **Activity Type** drop-down list.
 - Select from this list the applicable type (e.g. Phone call).
 - **Address:**
 - Click in the **Address** field, a list of all addresses linked to the customer will be displayed.

- Select the applicable address from this list.
- **Subject:**
 - Type in the **Subject** of this activity (e.g. Email new product product range catalogue).
- **Comments**
 - Type in a **Comment** relating to this activity (e.g. Customer looking to upgrade current machines).



CRM Example Company Abigail Milne

Save Activity 1

+ Case Subject Email updated copier price list

- Case State * Case State Interested (20%)
Percentage 20%

- Activity 2

* Type Activity type
Address The address relating to the activity
* Subject The subject of the activity 3
Comments Information relating to the activity

Activity Attendees Attendees +
Case contact and salesman are always made attendees

Send Email Invites ☐ iCal invitations are disabled because you are using Exchange syncing.


- Schedule Date 1 Nov 2019 from 15:00 to 16:00
Reminder Email ☐ SMS ☐ 30 minutes before scheduled start


+ Quote


+ Case History View previous activities, quotes and changes on this case.




Save



1. You can select **Attendees** to link to the activity.
 - In this field you can select from **employees** and the **current customer contacts**.
2. You can select to **Send Email Invites** in order to have the system send an email invite for this activity, to all attendees.
3. Schedule the **Date and Time** for the activity.
4. Set a **Reminder** Email or SMS as and if required.



Example Company

Abigail Milne



Save Activity

+ Case	Subject Email updated copier price list
- Case State	* Case State Interested (20%) Percentage 20%
- Activity	* Type Email Address The address relating to the activity * Subject Email new product brochure Comments Customer looking to upgrade current machines.
Activity Attendees	<div> 1 Attendees   </div> <div> 2 Send Email Invites <input type="checkbox"/> iCal invitations are disabled because you are using Exchange syncing. </div>
- Schedule	<div> 3 Date 1 Nov 2019 from 15:00 to 16:00 </div> <div> Reminder Email <input type="checkbox"/> SMS <input type="checkbox"/> 30 minutes before scheduled start 4 </div>
+ Quote	
+ Case History	View previous activities, quotes and changes on this case.


Save

Add Related Customers

- Once you have added Attendees, you may also wish to link **Related Customers** in order to invite contacts from various clients to an Activity - such as a meeting or training session. (these are not found in the Attendees list).
- Click on the **expand** button in the **Case** frame.

CRM

Example Company

Abigail Milne

⚙️

📞 Save Activity

⬅️ 📅 💾

+

Case

-

Case State

-

Activity

Activity Attendees

-

Schedule

+

Quote

+

Case History

Subject Email updated copier price list

* Case State Interested (20%)

Percentage 20%

* Type Email

Address The address relating to the activity

* Subject Email new product brochure

Comments Customer looking to upgrade current machines.

Attendees

+

Abigail Milne

👤 Duncan McCreddie

👤 Abigail Milne

Page 1 of 1 (2 items)

⏪ [1] ⏩ ⏴ ⏵

Page size: 10

⏴ ⏵

Send Email Invites

☐ iCal invitations are disabled because you are using Exchange syncing.

Date 1 Nov 2019

from 15:00 to 16:00

Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

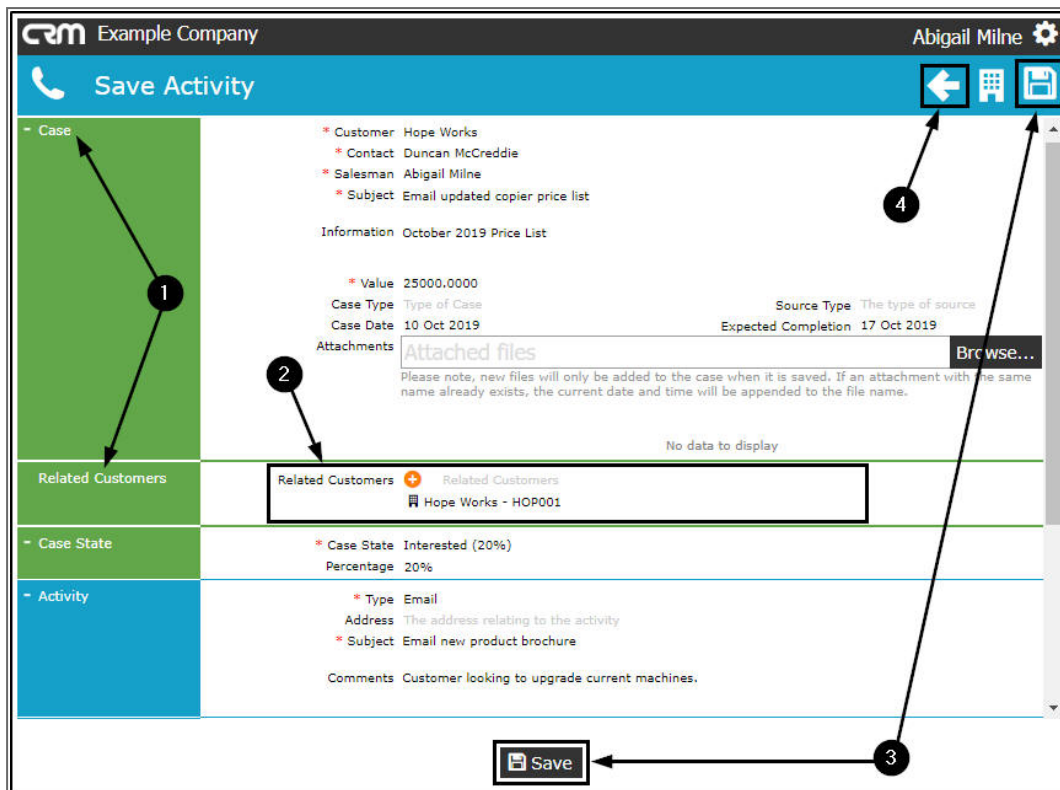
View previous activities, quotes and changes on this case.


💾 Save




1. The Case frame will be expanded to reveal the **Related Customers** frame.
2. Follow the process to **add the related customer(s)**, if required.
3. When you have finished adding the new activity details for this case, click on **Save** to return to the previous page .
4. If you do not wish to save any changes, click on the **Back** button to return to the previous page.

Help v2.5.1.4 - Pg 19 - Printed: 27/06/2024

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CRM Example Company Abigail Milne 

Save Activity   

Case 1

* Customer: Hope Works
 * Contact: Duncan McCreddie
 * Salesman: Abigail Milne
 * Subject: Email updated copier price list

Information: October 2019 Price List

* Value: 25000.0000
 Case Type: Type of Case
 Case Date: 10 Oct 2019
 Source Type: The type of source
 Expected Completion: 17 Oct 2019

Attachments: 2

Attached files Browse...

Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

No data to display

Related Customers

Related Customers 3

Hope Works - HOP001

Case State

* Case State: Interested (20%)
 Percentage: 20%

Activity

* Type: Email
 Address: The address relating to the activity
 * Subject: Email new product brochure
 Comments: Customer looking to upgrade current machines.

Save 4

CLOSE THIS CASE

1. In the **Cases for [selected customer]** page, hover anywhere over an open Case to display the **Action Items** buttons.
2. Click on the **Close this Case** icon.

Subject	Contact Name	Customer Name	Case State Description	Is Pipeline Case
test		Customer Kelly Jones , Hope Works		Is Pipeline Case No
SP1589 - client interested		Customer Matthew Thompson , Hope Works		Is Pipeline Case No
Test newest CRM 3.4.3.0		Customer Matthew Thompson , Hope Works		Is Pipeline Case No
new test of case types		Customer Kelly Jones , Hope Works		Is Pipeline Case No
Time will open doors		Customer Kelly Jones , Hope Works		Is Pipeline Case No
Email new brochures		Customer Duncan McCreddie , Hope Works		Is Pipeline Case No
New product range		Customer John West , Hope Works		Is Pipeline Case No
Email updated copier price list		Customer Duncan McCreddie , Hope Works		Is Pipeline Case No
Call Customer to arrange meeting time		Customer Michael Jackson , Hope Works		Is Pipeline Case No

1. The **Save Case** page will be displayed.
2. Type a completion note/explanation in the **Notes** field (e.g. Customer budget not yet approved for machine upgrade).

Save Case

+ Case Subject Email updated copier price list

- Case State * Case State Interested (20%)
Percentage 20%

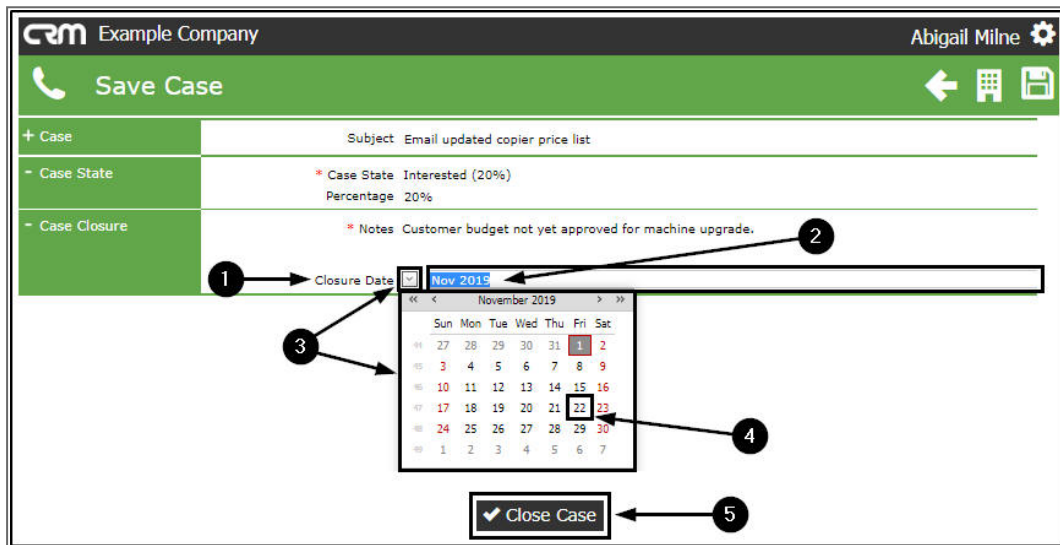
- Case Closure * Notes Completion notes about case
Closure Date 1 Nov 2019

✓ Close Case

1. The **Closure Date** will auto populate with the current date.

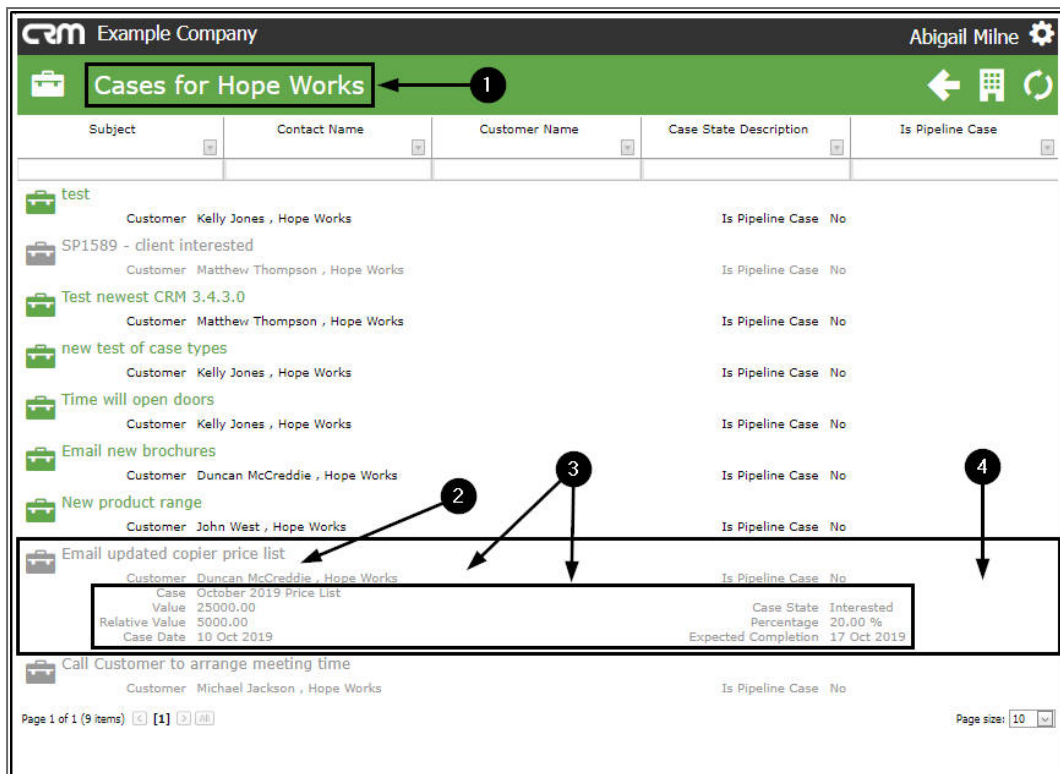
If you wish to change this date,

2. Either, type the correct date directly in this field,
3. Or, click in this field to display a drop-down arrow, click on this arrow to bring up the calendar function.
4. Select the applicable alternative date.
5. Click on **Close Case**.



The screenshot shows the 'Save Case' form in a CRM system. The form has a green header bar with the 'CRM' logo, 'Example Company', and the user's name 'Abigail Milne'. Below the header, there are three main sections: 'Case', 'Case State', and 'Case Closure'. The 'Case' section shows the subject 'Email updated copier price list'. The 'Case State' section shows 'Case State: Interested (20%)' and 'Percentage: 20%'. The 'Case Closure' section shows 'Notes: Customer budget not yet approved for machine upgrade.' and a 'Closure Date' field. The 'Closure Date' field is highlighted with a red box and a red arrow pointing to it. A calendar dropdown is open, showing the month of November 2019. The date '22' is selected. A red arrow points to the '22' in the calendar. Below the calendar, there is a 'Close Case' button with a checkmark icon. A red arrow points to this button.

1. You will return to the **Cases for [selected customer]** listing page.
2. The recently closed Case will now be **greyed out** in this list.
3. You can single click on the closed Case to view the Case **Summary**.
4. You will note that the **Action Item buttons** are no longer available for this Case.



CRM Example Company | Abigail Milne

Cases for Hope Works

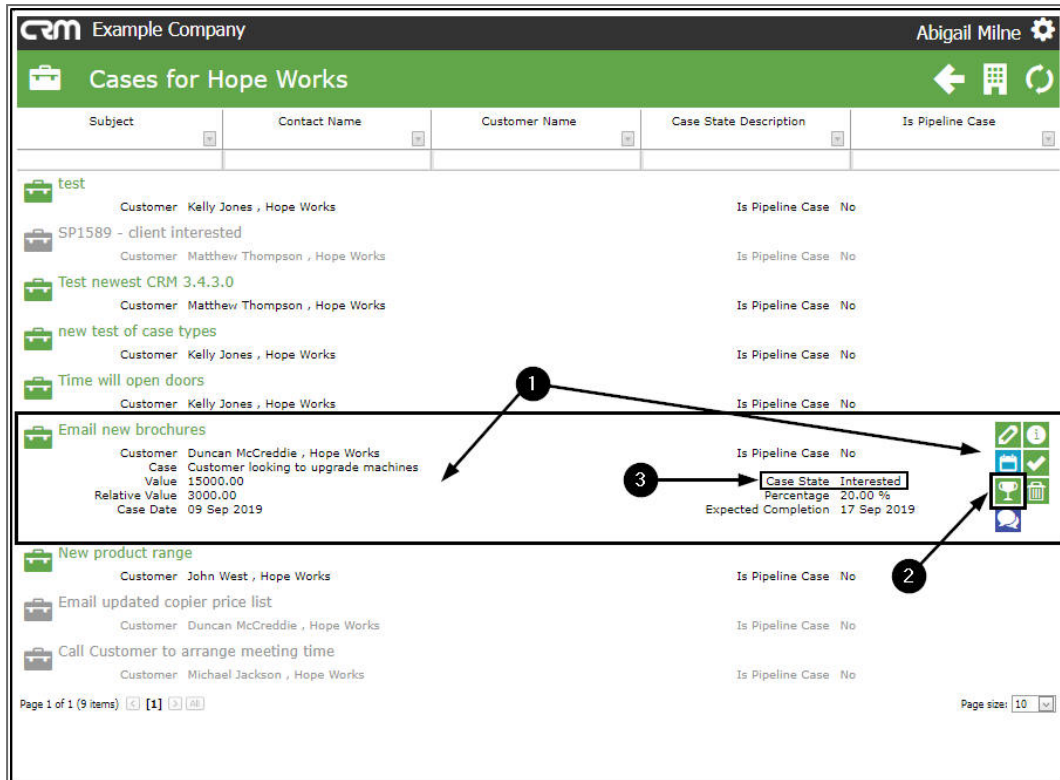
Subject	Contact Name	Customer Name	Case State Description	Is Pipeline Case
test		Customer Kelly Jones , Hope Works		Is Pipeline Case No
SP1589 - client interested		Customer Matthew Thompson , Hope Works		Is Pipeline Case No
Test newestest CRM 3.4.3.0		Customer Matthew Thompson , Hope Works		Is Pipeline Case No
new test of case types		Customer Kelly Jones , Hope Works		Is Pipeline Case No
Time will open doors		Customer Kelly Jones , Hope Works		Is Pipeline Case No
Email new brochures		Customer Duncan McCreddie , Hope Works		Is Pipeline Case No
New product range		Customer John West , Hope Works		Is Pipeline Case No
Email updated copier price list		Customer Duncan McCreddie , Hope Works	Case State Interested	Is Pipeline Case No
<div> <div>Case October 2019 Price List</div> <div>Value 25000.00</div> <div>Relative Value 5000.00</div> <div>Case Date 10 Oct 2019</div> <div>Percentage 20.00 %</div> <div>Expected Completion 17 Oct 2019</div> </div>				
Call Customer to arrange meeting time		Customer Michael Jackson , Hope Works		Is Pipeline Case No

Page 1 of 1 (9 items) | [1] | Page size: 10

WIN A CASE

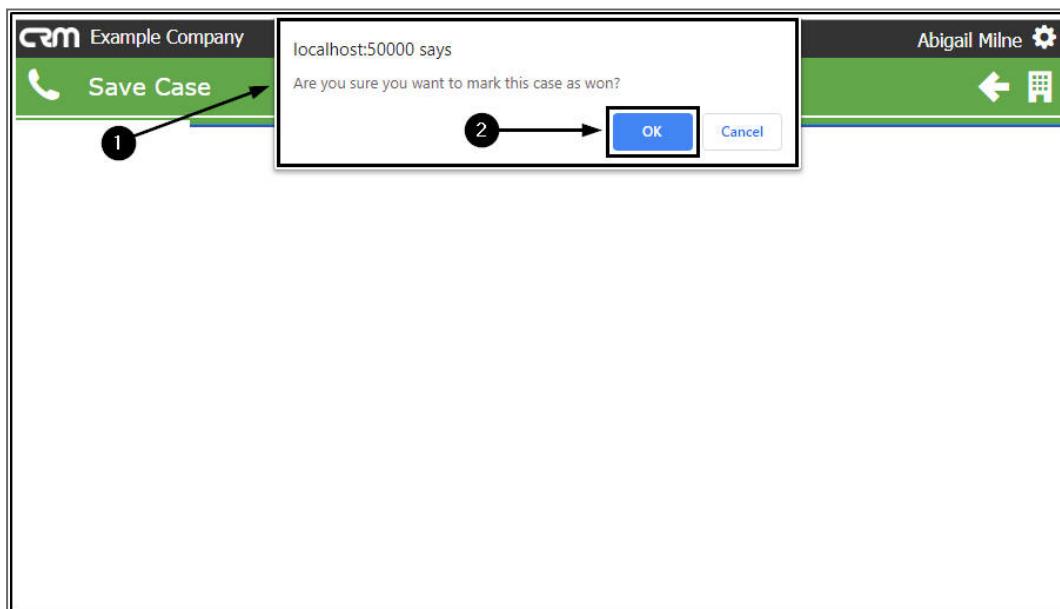
1. In the **Cases for [selected customer]** page, hover anywhere over an open Case to display the **Action Items** buttons.
2. Click on the **Won this Case** icon.
3. Note that the **Case State** is currently **Interested**.

Note: A Case cannot be Won via Case Action Buttons - if this Case Type has Stage Gates Enabled. All Stage Gate Questions will need to be responded to, in order to 'Win the Case'.



Subject	Contact Name	Customer Name	Case State Description	Is Pipeline Case
test	Kelly Jones	Hope Works		No
SP1589 - client interested	Matthew Thompson	Hope Works		No
Test newest CRM 3.4.3.0	Matthew Thompson	Hope Works		No
new test of case types	Kelly Jones	Hope Works		No
Time will open doors	Kelly Jones	Hope Works		No
Email new brochures	Duncan McCreddie	Hope Works	Case State: Interested Percentage: 20.00 % Expected Completion: 17 Sep 2019	No
New product range	John West	Hope Works		No
Email updated copier price list	Duncan McCreddie	Hope Works		No
Call Customer to arrange meeting time	Michael Jackson	Hope Works		No

1. A message box will pop up asking:
 - *Are you sure you want to mark this case as won?*
2. Click on **OK**.

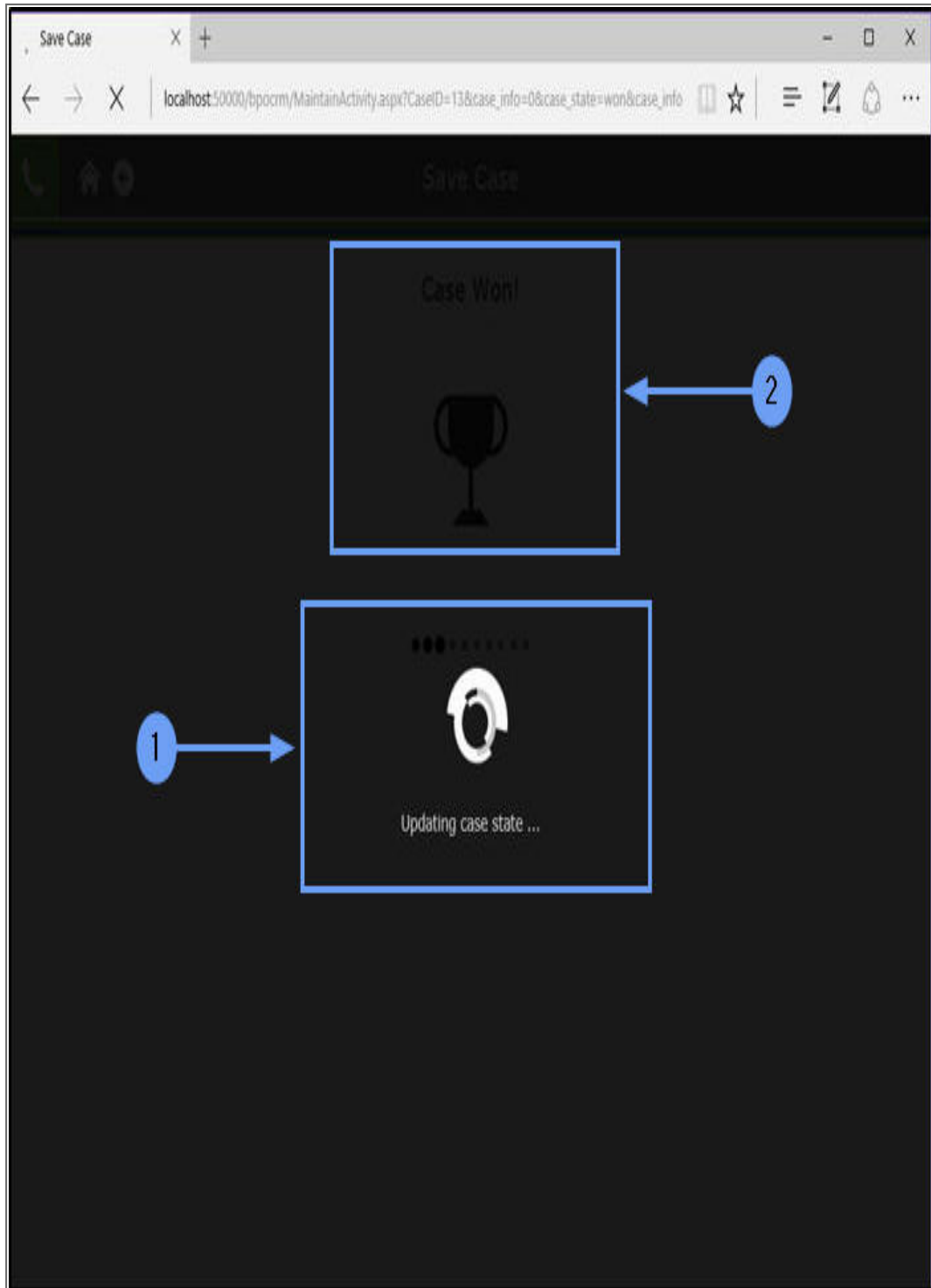


localhost:50000 says

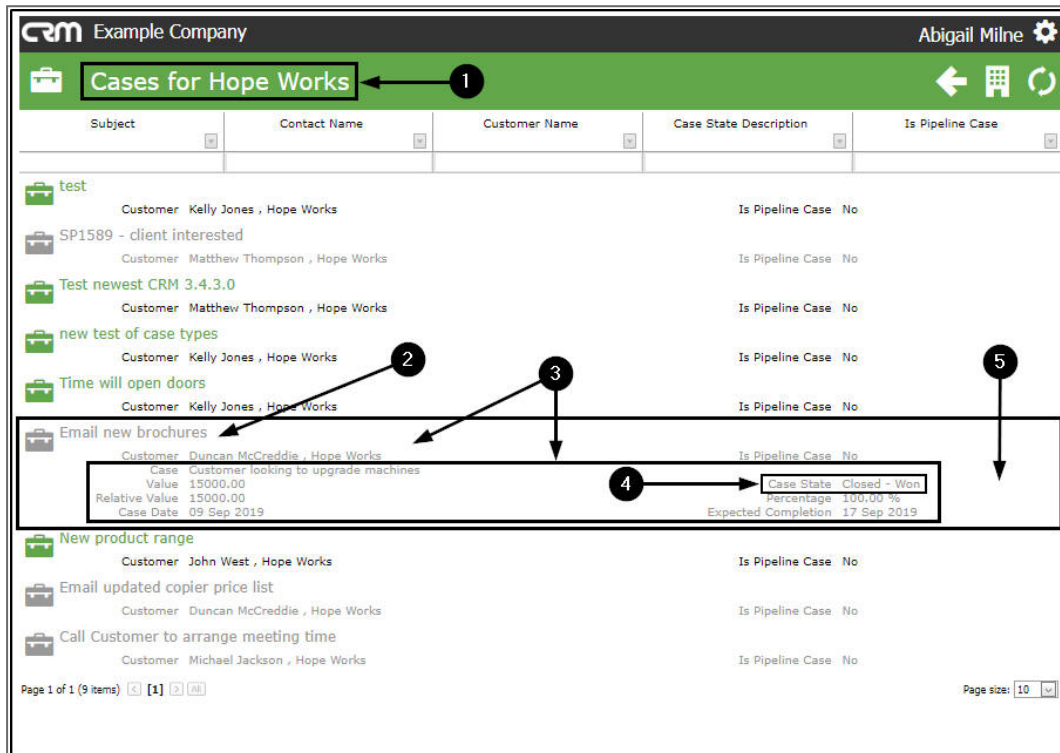
Are you sure you want to mark this case as won?

OK Cancel

1. The system will update the Case State.
2. A **Case Won** message with a **Trophy** image will briefly flash on the screen.



1. You will return to the **Cases for [selected customer]** listing page.
2. The recently won Case will now be **greyed out** in this list.
3. You can single click on the won Case to view the Case **Summary**.
4. The **Case State** has updated to **Closed - Won**.
5. You will note that the **Action Item buttons** are no longer available for this Case.



CRM Example Company | Abigail Milne

Cases for Hope Works

Subject	Contact Name	Customer Name	Case State Description	Is Pipeline Case
test	Customer: Kelly Jones, Hope Works			No
SP1589 - client interested	Customer: Matthew Thompson, Hope Works			No
Test newest CRM 3.4.3.0	Customer: Matthew Thompson, Hope Works			No
new test of case types	Customer: Kelly Jones, Hope Works			No
Time will open doors	Customer: Kelly Jones, Hope Works			No
Email new brochures	Customer: Duncan McCredie, Hope Works	Case: Customer looking to upgrade machines Value: 15000.00 Relative Value: 15000.00 Case Date: 09 Sep 2019	Case State: Closed - Won Percentage: 100.00 % Expected Completion: 17 Sep 2019	No
New product range	Customer: John West, Hope Works			No
Email updated copier price list	Customer: Duncan McCredie, Hope Works			No
Call Customer to arrange meeting time	Customer: Michael Jackson, Hope Works			No

Page 1 of 1 (9 items) | Page size: 10

LOST THIS CASE

1. In the **Cases for [selected customer]** page, hover anywhere over an open Case to display the **Action Items** buttons.
2. Click on the **Lost this Case** icon.
3. Note that the current **Case State** is **Distant Prospect - on hold**.

Subject	Contact Name	Customer Name	Case State Description	Is Pipeline Case
test	Customer Kelly Jones , Hope Works			No
SP1589 - client interested	Customer Matthew Thompson , Hope Works			No
Test newest CRM 3.4.3.0	Customer Matthew Thompson , Hope Works			No
new test of case types	Customer Kelly Jones , Hope Works			No
Time will open doors	Customer Kelly Jones , Hope Works			No
Email new brochures	Customer Duncan McCreddie , Hope Works			No
New product range	Customer John West , Hope Works			No
Email updated copier price list	Customer Duncan McCreddie , Hope Works			No
Call Customer to arrange meeting time	Customer Michael Jackson , Hope Works			No
Assess new site for potential machine installation.	Customer John West , Hope Works			No

Case State: Distant prospect - on hold
Percentage: 5.00 %
Expected Completion: 04 Dec 2019

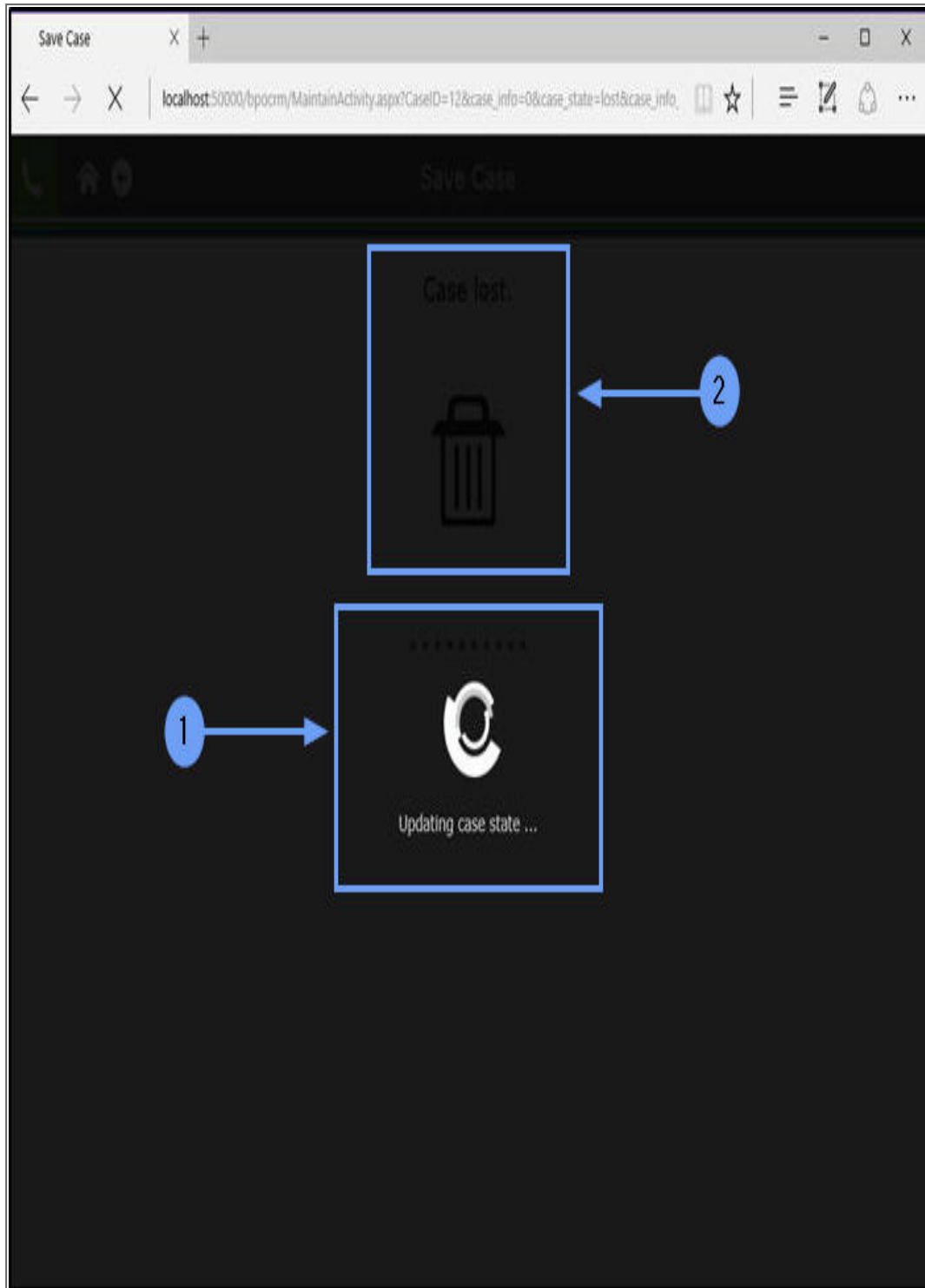
1. A message box will pop up asking:
 - *Are you sure you want to mark this case as lost?*
2. Click on **OK**.

localhost:50000 says

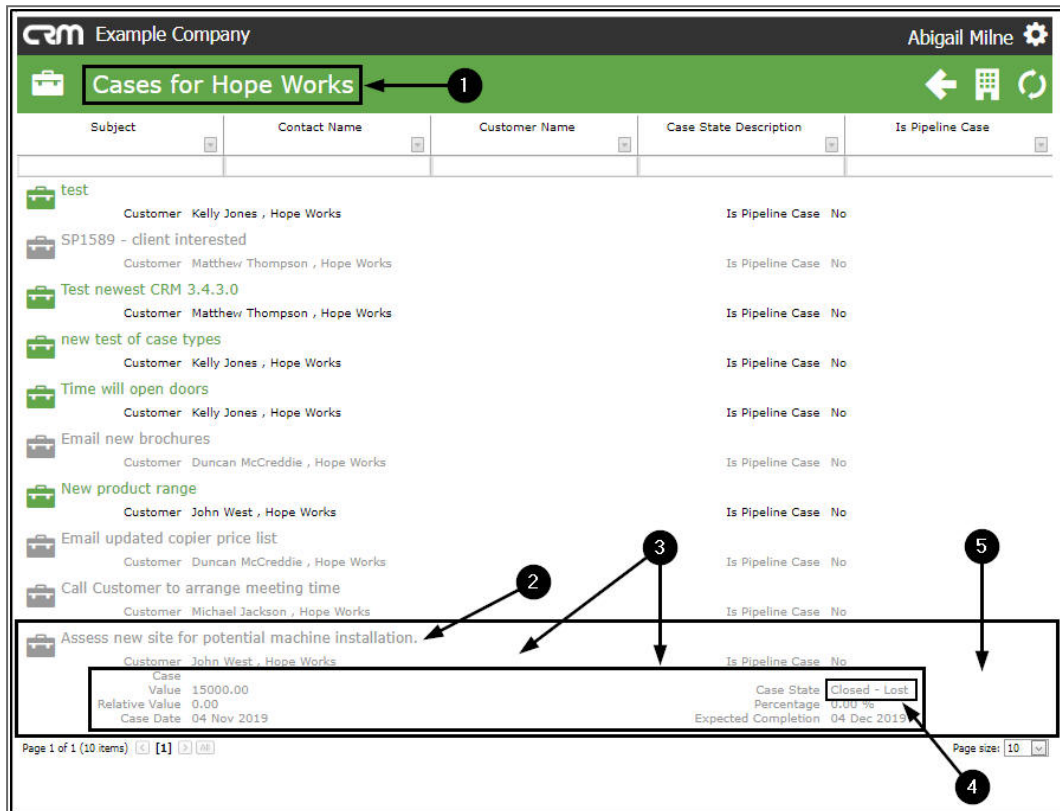
Are you sure you want to mark this case as lost?

OK Cancel

1. The system will update the Case State.
2. A **Case Lost** message with a **Trash Bin** image will briefly flash on the screen.



1. You will return to the **Cases for [selected customer]** listing page.
2. The recently lost Case will now be **greyed out** in this list.
3. You can single click on the lost Case to view the Case **Summary**.
4. The **Case State** has updated to **Closed - Lost**.
5. You will note that the **Action Item buttons** are no longer available for this Case.



CRM Example Company Abigail Milne

Cases for Hope Works

Subject	Contact Name	Customer Name	Case State Description	Is Pipeline Case
test	Customer Kelly Jones , Hope Works			No
SP1589 - client interested	Customer Matthew Thompson , Hope Works			No
Test newest CRM 3.4.3.0	Customer Matthew Thompson , Hope Works			No
new test of case types	Customer Kelly Jones , Hope Works			No
Time will open doors	Customer Kelly Jones , Hope Works			No
Email new brochures	Customer Duncan McCreddie , Hope Works			No
New product range	Customer John West , Hope Works			No
Email updated copier price list	Customer Duncan McCreddie , Hope Works			No
Call Customer to arrange meeting time	Customer Michael Jackson , Hope Works			No
Assess new site for potential machine installation.	Customer John West , Hope Works		Closed - Lost	No

Case Value 15000.00
Relative Value 0.00
Case Date 04 Nov 2019
Case State Closed - Lost
Percentage 0.00 %
Expected Completion 04 Dec 2019

Page 1 of 1 (10 items) [1] [2] [3] Page size: 10

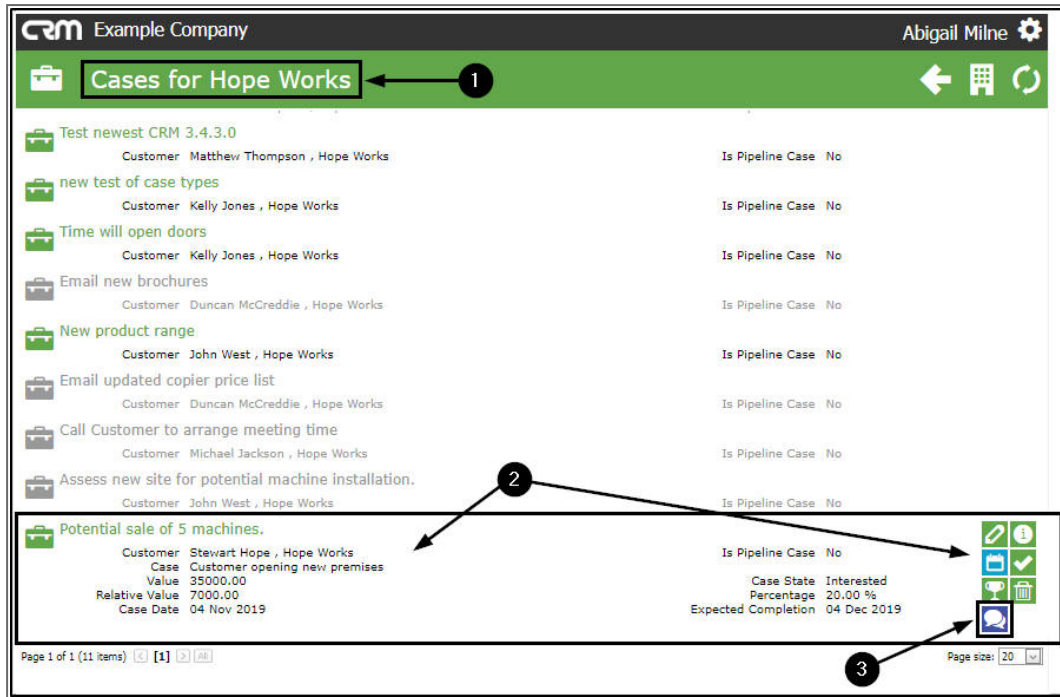
ADD A NEW QUOTE LINKED TO A CASE

- From the **Cases for [selected customer]** page page, you can link a Quote by navigating via the following **Action** buttons:
 - **View Case Info and History**
 - The **Save Case** page will open, expand the **Quote** frame.

- **View/Edit this Case**
 - The **Save Case** page will open, expand the **Quote** frame.
- **New Activity**
 - The **Save Activity** page will open, expand the **Quote** frame.
- **New Quote**
 - The **Save Quote** page will open, the Quote, Quote Financials and Quote Items frames will be expanded, ready for you to add the new Quote details.

For the purpose of this manual we will navigate from the **Save Quote** page page but the **link quote process** is the same from *either* page.

1. In the **Cases for [selected customer]** listing page.
2. Hover anywhere over an open Case to display the **Action Items** tiles.
3. Click on the **New Quote** tile.



1. The **Save Quote** page will open.

LINK QUOTE PROCESS

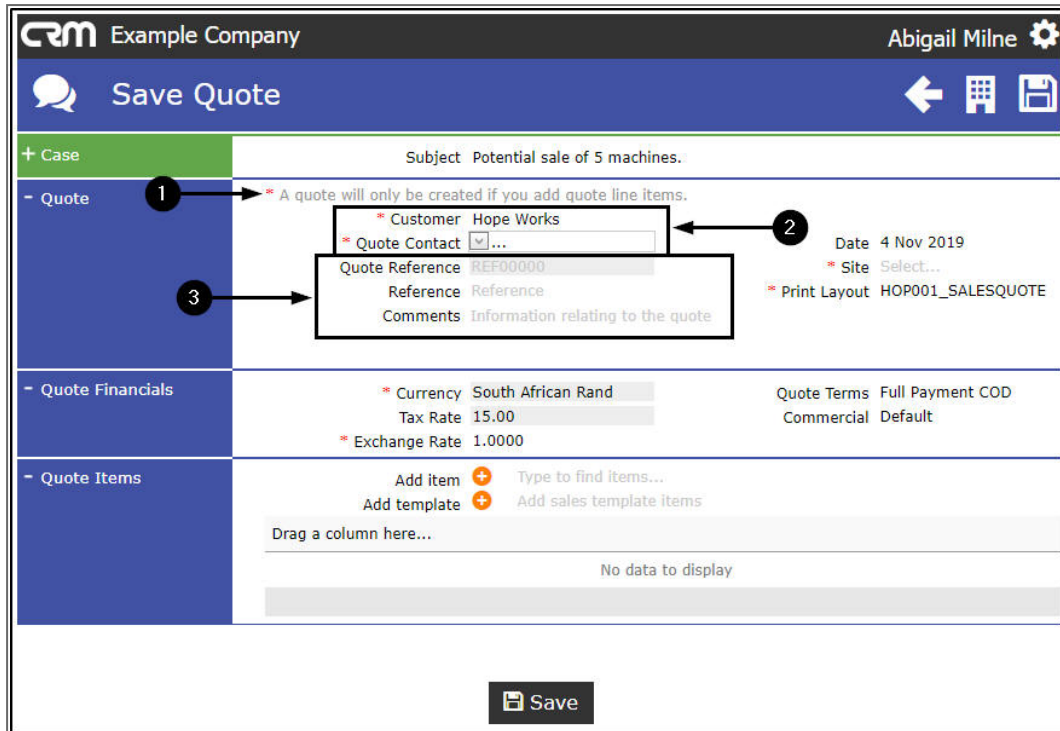
2. The **Subject** in the Case frame will be auto populated with the information of the Case selected in the previous step.
3. **Expand** the Case frame if you wish to view the full Case information in this page.
4. The following frames will be auto-expanded :
 - **Quote**
 - **Quote Financials** and
 - **Quote Items**

Note: If you are linking a Quote from the **Save Case** or **Save Activity** pages then you will need to expand these frames manually.



The screenshot shows the 'Save Quote' form in a CRM system. The form is titled 'Example Company' and 'Abigail Milne'. It has a 'Save Quote' button at the top left. The form is divided into several sections: 'Case', 'Quote', 'Quote Financials', and 'Quote Items'. The 'Case' section contains a 'Subject' field with the text 'Potential sale of 5 machines.' The 'Quote' section contains fields for 'Customer' (Hope Works), 'Quote Contact' (a dropdown menu), 'Quote Reference' (REF00000), 'Date' (4 Nov 2019), 'Site' (a dropdown menu), and 'Comments' (Information relating to the quote). The 'Quote Financials' section contains fields for 'Currency' (South African Rand), 'Tax Rate' (15.00), 'Exchange Rate' (1.0000), 'Quote Terms' (Full Payment COD), and 'Commercial' (Default). The 'Quote Items' section contains a table with columns for 'Add item' and 'Add template', and a 'Drag a column here...' prompt. A 'Save' button is located at the bottom right of the form.

1. Note the message at the top of the Quote frame: ***A quote will only be created if you add quote line items.*** This will be covered in the **Add Quote Items** section of this manual.
2. **Customer:** This will populate with the name of the Customer linked to the Case.
Quote Contact: This will populate with the contact selected in the Case section.
 - You can click on the drop-down arrow and select an alternative contact from the drop-down list, if required.
3. **Quote Reference:** The system will allocate a reference number as the quote is saved.
Reference: Type in a reference for this quote.
Comments: Type in a comment/additional information relating to this quote.



CRM Example Company Abigail Milne

Save Quote

+ Case Subject: Potential sale of 5 machines.

- Quote

* A quote will only be created if you add quote line items.

* Customer: Hope Works

* Quote Contact: [v]...

Date: 4 Nov 2019

* Site: Select...

* Print Layout: HOP001_SALESQUOTE

Quote Reference: REF000000

Reference: Reference

Comments: Information relating to the quote

- Quote Financials

* Currency: South African Rand

Tax Rate: 15.00

* Exchange Rate: 1.0000

Quote Terms: Full Payment COD

Commercial: Default

- Quote Items

Add item: Type to find items...

Add template: Add sales template items

Drag a column here...

No data to display

Save

1. **Date:** This will populate with the current date.

You can either type directly in this field to change the date, or click on the drop-down arrow and use the calendar function to select an alternative date if required.

Site: This will auto-populate with the site set up on this customer.

If the customer is linked to more than one site then click on the drop-down arrow and select the correct site for this quote.

Print Layout: This will auto populate with the Sales Quote print layout set up on the Customer.

QUOTE FINANCIALS

2. **Currency:** This will auto populate with the currency set up on the customer. You can click on the drop-down arrow and select an alternative currency, if required.

Tax Rate: This will auto populate with the tax rate set up on the customer.

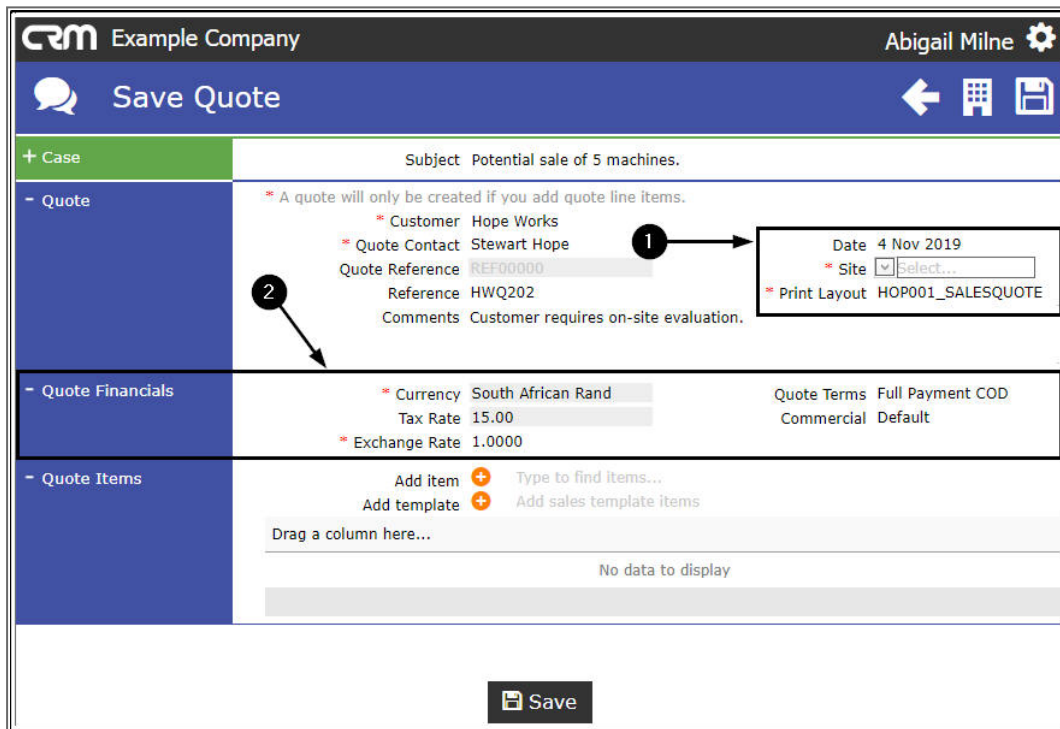
Exchange Rate: This will auto populate with the exchange rate set up on the customer.

Quote Terms: This is the quote repayment factor and should be configured in **Static Data: Sales Quote Terms or Repayment Method** This will auto populate with Full Payment COD.

- You can click on the drop-down arrow and select an alternative payment period, if required.

Commercial: This will auto populate with the **commercial** set up on the customer.

- Click in this field to reveal a drop-down arrow and select from the list an alternative commercial, if required.



CRM Example Company Abigail Milne

Save Quote

+ Case Subject Potential sale of 5 machines.

- Quote

* A quote will only be created if you add quote line items.

* Customer Hope Works

* Quote Contact Stewart Hope

Quote Reference REF00000

Reference HWQ202

Comments Customer requires on-site evaluation.

Date 4 Nov 2019

* Site

* Print Layout HOP001_SALESQUOTE

- Quote Financials

* Currency South African Rand

Tax Rate 15.00

* Exchange Rate 1.0000

Quote Terms Full Payment COD

Commercial Default

- Quote Items

Add item

Add template

Drag a column here...

No data to display

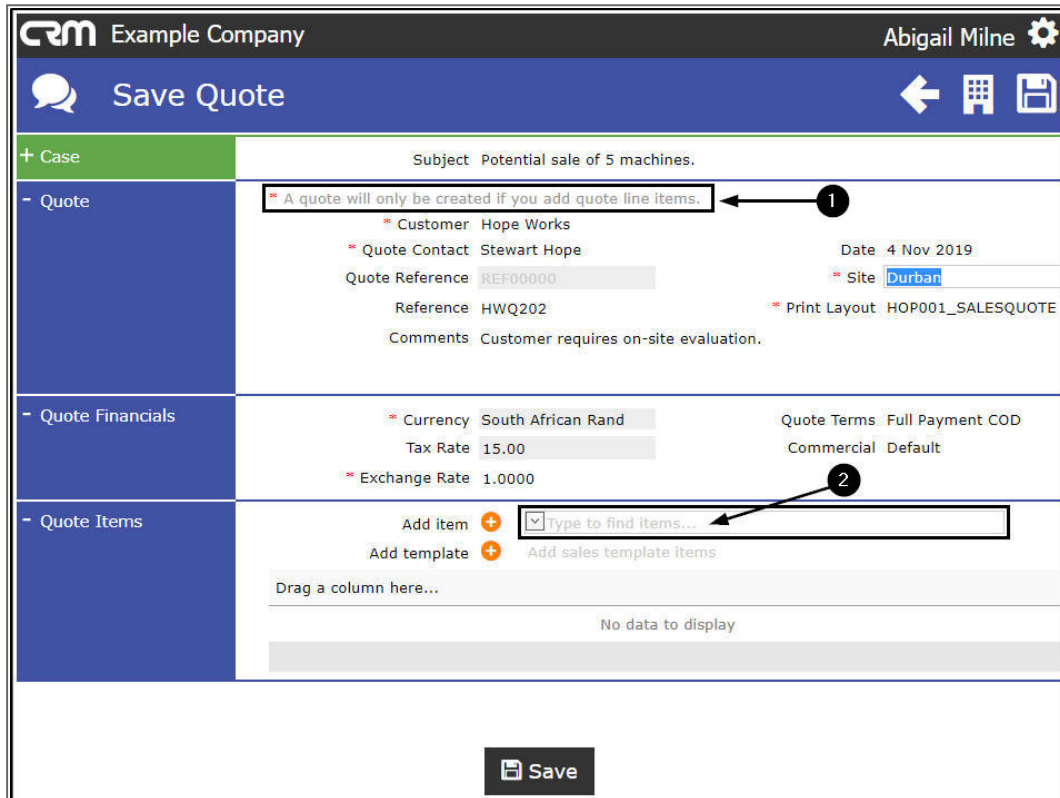
Save

ADD QUOTE ITEMS

You now have the ability to add single items to a quote.

Note: For Part Numbers to pull through to this list - you need to ensure that the **Quote Products are specified**.

1. Take note of the message at the top of the Quote section: you must add at least one item to this quote for it to be created. This process is set out below.
2. In the **Add item** field, start typing the **code** or **description** of the item you wish to link to this quote.



CRM Example Company Abigail Milne

Save Quote

+ Case Subject: Potential sale of 5 machines.

- Quote

- * A quote will only be created if you add quote line items. (1)
- * Customer: Hope Works
- * Quote Contact: Stewart Hope
- Quote Reference: REF00000
- Reference: HWQ202
- Comments: Customer requires on-site evaluation.
- Date: 4 Nov 2019
- * Site: Durban
- * Print Layout: HOP001_SALESQUOTE

- Quote Financials

- * Currency: South African Rand
- Tax Rate: 15.00
- * Exchange Rate: 1.0000
- Quote Terms: Full Payment COD
- Commercial: Default

- Quote Items

- Add item (+)
- Add template (+)
- Type to find items... (2)
- Add sales template items
- Drag a column here...
- No data to display

Save

1. As you start typing in the field, a **Type**, **Code** and **Description** list of all items on the system, will be displayed.
2. The system will **filter** for the item that you are searching for.
3. Select the applicable **item** from this list.

CRM

Example Company

Abigail Milne

Save Quote

←

+ Case

Subject Potential sale of 5 machines.

- Quote

* A quote will only be created if you add quote line items.

* Customer Hope Works

* Quote Contact Stewart Hope

Quote Reference REF00000

Reference HWQ202

Comments Customer requires on-site evaluation.

Date 4 Nov 2019

* Site Durban

* Print Layout HOP001_SALESQUOTE

- Quote Financials

* Currency South African Rand

Tax Rate 15.00

* Exchange Rate 1.0000

Quote Terms Full Payment COD

Commercial Default

- Quote Items

Add item +

copier

Type	Code	Description	#
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	1
INVN	SP1818	Sprint copier	12
INVN	1458-96523	K147 Kyocera Colour Copier	13
INVN	KM250MFP	Konica Minolta Colour Multi-Functional Copier	20
INVN	SP19-123456	SP19-12 Colour Copier	22
INVN	SP204	SP204 Colour Copier	26

Save

1. The selected item code and description will populate the **Add** item field.
2. Click on the **plus[+]** button.

CRM

Example Company

Abigail Milne

Save Quote

←

+ Case

Subject Potential sale of 5 machines.

- Quote

* A quote will only be created if you add quote line items.

* Customer Hope Works

* Quote Contact Stewart Hope

Quote Reference REF00000

Reference HWQ202

Comments Customer requires on-site evaluation.

Date 4 Nov 2019

* Site Durban

* Print Layout HOP001_SALESQUOTE

- Quote Financials

* Currency South African Rand

Tax Rate 15.00

* Exchange Rate 1.0000

Quote Terms Full Payment COD

Commercial Default

- Quote Items

Add item

Add template

INVN | SP2020 | SP2020 Sprint Colour Multi Functional Copi

Add sales template items

Drag a column here...

No data to display

Save

1. The item will be added to the **Quote Items** frame.
2. You will note that there are **2** action buttons linked to this item.
 - An **Edit** button. This will enable you to edit the item details e.g. quantity, price, if required.
 - A **Delete** button. This will enable you to delete the item from the quote, if required.

EDIT QUOTE ITEM

3. Click on the **Edit** button.

CRM

Example Company

Abigail Milne

Save Quote

+ Case

Subject: Potential sale of 5 machines.

+ Quote

* A quote will only be created if you add quote line items.

* Customer: Hope Works

Quote Reference: REF000000

Reference: HWQ202

Comments: Customer requires on-site evaluation.

Date: 4 Nov 2019

* Site: Durban

* Print Layout: HOP001_SALESQUOTE

+ Quote Financials

* Currency: South African Rand

Tax Rate: 15.00

* Exchange Rate: 1.0000

Quote Terms: Full Payment COD

Commercial: Default

+ Quote Items

Add item

Add template

Type to find items...

Add sales template items

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	1	5610.67	5400.00		5400.00	<div> <div></div> <div></div> </div>	6210.00	
				5610.67	5400.00	0.00	5400.00		6210.00	

Save

1. An **edit item** frame will be displayed.

Here you can make changes to the following details:

2. **Item Description**
3. **Item Quantity**
4. **Item Unit Cost**
5. **Item Price**
6. **Suppress on Print** Select this check box if you do not want this line item visible on the printed quote. This will not affect the Sub/Grand Total
7. Click on the **Apply Changes** icon [] to save your changes or the the **Cancel changes** icon [x] to cancel the changes, as required.

CRM

Example Company

Abigail Milne

Save Quote

Quote

A quote will only be created if you add quote line items.

Customer: Hope Works

Quote Contact: Stewart Hope

Quote Reference: REF000000

Reference: HWQ202

Comments: Customer requires on-site evaluation.

Date: 4 Nov 2019

Site: Durban

Print Layout: HOP001_SALESQUOTE

Quote Financials

Currency: South African Rand

Tax Rate: 15.00

Exchange Rate: 1.0000

Quote Terms: Full Payment COD

Commercial: Default

Quote Items

Add Item

Add template

Type to find items...

Add sales template items

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppre on Pri
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	1	5610.67	5400.00		5400.00		6210.00	

1

Quote Item Description: SP2020 Sprint Colour

Quantity: 1

Unit Cost: 5610.674500

Item Price: 5400.0000

6

Suppress on Print: ☐

2

3

4

5

7

7

Save

1. In this example, the **Quantity** has been updated to **2**.
2. The **Total** and **Total Inclusive** columns will update accordingly.

LINK ADDITIONAL QUOTE ITEMS

3. In the **Add item** field, start typing the **code** or **description** of the next item that you wish to add to the quote.

CRM Example Company Abigail Milne

Save Quote

+ Case Subject: Potential sale of 5 machines.

- Quote

* A quote will only be created if you add quote line items.

* Customer: Hope Works
 Quote Contact: Stewart Hope
 Quote Reference: RFF00000
 Reference: HWQ202
 Comments: Customer requires on-site evaluation.

Date: 4 Nov 2019
 Site: Durban
 Print Layout: HOP001_SALESQUOTE

- Quote Financials

* Currency: South African Rand
 Tax Rate: 15.00
 Exchange Rate: 1.0000

Quote Terms: Full Payment COD
 Commercial: Default

- Quote Items

Add item +
 Add template +

Type to find items...

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	2	5610.67	5400.00		10800.00		12420.00	
				5610.67	5400.00	0.00	10800.00		12420.00	

Save

1. As you start typing in the field, the **Type**, **Code** and **Description** list will again be displayed.
2. The system will filter for the item that you are searching for.
3. Select the applicable item from this list.

CRM Example Company Abigail Milne

Save Quote

+ Case Subject: Potential sale of 5 machines.

- Quote

* A quote will only be created if you add quote line items.

* Customer: Hope Works
 Quote Contact: Stewart Hope
 Quote Reference: RFF00000
 Reference: HWQ202
 Comments: Customer requires on-site evaluation.

Date: 4 Nov 2019
 Site: Durban
 Print Layout: HOP001_SALESQUOTE

- Quote Financials

* Currency: South African Rand
 Tax Rate: 15.00
 Exchange Rate: 1.0000

Quote Terms: Full Payment COD
 Commercial: Default

- Quote Items

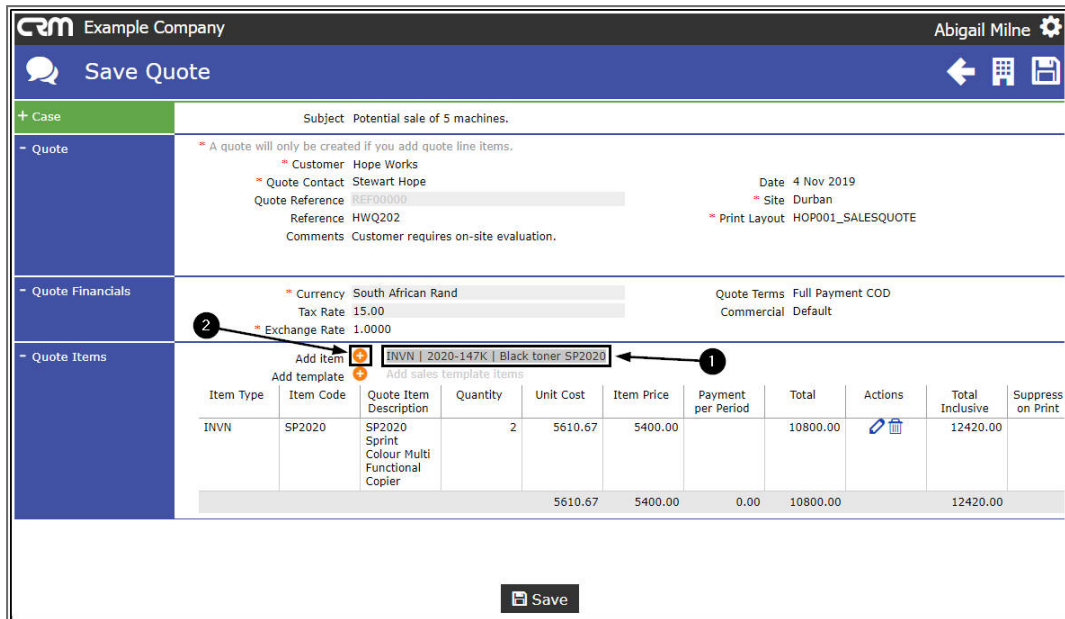
Add item +
 Add template +

Type to find items...

Type	Code	Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	2020-147K	Black toner SP2020	2							
INVN	SP19-147K	Black Toner SP1919	4							
INVN	147-88854H	K147 Black toner	14							
INVN	12-098765	SP19-12 Black Toner	23							
INVN	204-147K	SP204 Black Toner	27							
INVN	147258	Black Toner	31							
INVN	540-147K	Compatible black toner	55							

Save

1. The additional item code and description will populate the **Add** item field.
2. Click on the **plus [+]** button.



The screenshot shows the 'Save Quote' interface for 'Example Company'. The top bar includes the company name, user 'Abigail Milne', and navigation icons. The main form is divided into sections: Case, Quote, Quote Financials, and Quote Items.

Case Section: Subject: Potential sale of 5 machines.

Quote Section: A quote will only be created if you add quote line items. Customer: Hope Works. Quote Contact: Stewart Hope. Date: 4 Nov 2019. Site: Durban. Quote Reference: REF00000. Reference: HWQ202. Comments: Customer requires on-site evaluation. Print Layout: HOP001_SALESQUOTE.

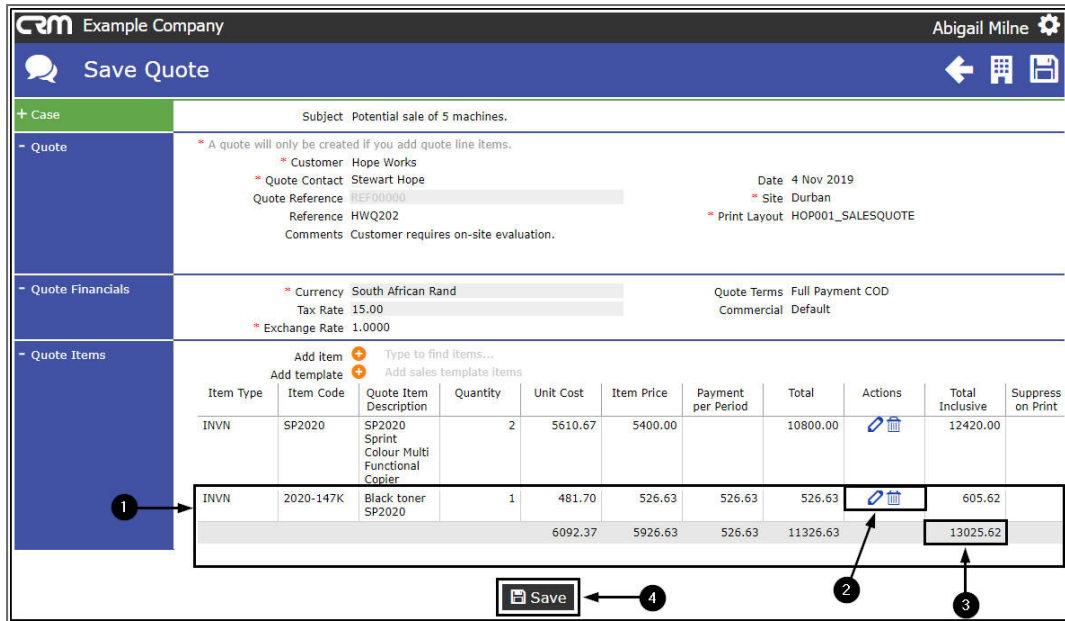
Quote Financials Section: Currency: South African Rand. Tax Rate: 15.00. Exchange Rate: 1.0000. Quote Terms: Full Payment COD. Commercial: Default.

Quote Items Section: A table with columns: Item Type, Item Code, Quote Item Description, Quantity, Unit Cost, Item Price, Payment per Period, Total, Actions, Total Inclusive, and Suppress on Print. The table contains one item: INVN, SP2020, SP2020 Sprint Colour Multi Functional Copier, 2, 5610.67, 5400.00, 0.00, 10800.00, 12420.00. A 'Save' button is at the bottom.

1. The additional item will be added to the **Quote Items** frame.
2. Edit the details, if required.
3. The quote **Total Inclusive** amount will update to include this item.

SAVE QUOTE

4. When you have finished adding items to the Quote sections, click on **Save**.



CRM Example Company Abigail Milne

Save Quote

+ Case Subject: Potential sale of 5 machines.

- Quote

* A quote will only be created if you add quote line items.

* Customer: Hope Works
 * Quote Contact: Stewart Hope
 Quote Reference: REF00000
 Reference: HWQ202
 Comments: Customer requires on-site evaluation.

Date: 4 Nov 2019
 * Site: Durban
 * Print Layout: HOP001_SALESQUOTE

- Quote Financials

* Currency: South African Rand
 Tax Rate: 15.00
 * Exchange Rate: 1.0000

Quote Terms: Full Payment COD
 Commercial: Default

- Quote Items

Add Item
 Add template
 Type to find items...
 Add sales template items

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	2	5610.67	5400.00		10800.00		12420.00	
INVN	2020-147K	Black toner SP2020	1	481.70	526.63	526.63	526.63		605.62	
				6092.37	5926.63	526.63	11326.63		13025.62	

Save

1. A message box will appear at the top of the page informing you that:
 - **Quote saved successfully**
2. The system will have allocated a Quote Reference Number.

There are now 4 processing options available in this page:

3. [Delete](#)
 4. [View](#)
 5. [Save](#)
 6. [Copy](#)
7. For the purpose of this manual, we have selected the Customers icon to return to the **Customer Dashboard** (Customer Home page).

Quote saved successfully.

Save Quote

+ Case

Subject: Potential sale of 5 machines.

- Quote

* A quote will only be created if you add quote line items.

* Customer: Hope Works

* Quote Contact: Stewart Hope

* Quote Reference: QT00000216

* Reference: HWQ202

* Comments: Customer requires on-site evaluation.

* Date: 4 Nov 2019

* Site: Durban

* Print Layout: HOP001_SALESQUOTE

- Quote Financials

* Currency: South African Rand

* Tax Rate: 15.00000

* Exchange Rate: 1.0000

Quote Terms: Full Payment COD

Commercial: Default

+ Add item
+ Add template

Type to find items...
Add sales template items

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	2.00	5610.67	5400.00	5400.00	10800.00		12420.00	
INVN	2020-147K	Black toner SP2020	1.00	481.70	526.63	526.63	526.63		605.62	
			3.00	6092.37	5926.63	5926.63	11326.63		13025.62	

Delete

View

Save

Copy

View New Quote from the Customer Dashboard

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



1. The **Quotes for [selected customer]** page will open.
2. The quote that you linked to the Case, can still be viewed in this listing page.
3. Use the **Page Reference field** or the **Filter Row** to search for the quote if it not listed on the first open page.

Either

4. Click on **Back**

Or

5. Click on the **Customer icon**

to return to the **Customer Dashboard** (Customer Home page).

CRM Example Company Abigail Milne

Quotes for Hope Works

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000202	HOP001	Hope Works	toner	600.36	ZAR	17 Nov 2017	Order generated	Yes
QT0000203	HOP001	Hope Works	test	14073.30	ZAR	18 Dec 2017	Order generated	Yes
QT0000204	HOP001	Hope Works	1234	20932.74	ZAR	29 Jan 2018	Order generated	Yes
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	New quote	Yes
QT0000210	HOP001	Hope Works	HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000214	HOP001	Hope Works		18630.00	ZAR	24 Oct 2019	New quote	No
QT0000217	HOP001	Hope Works	HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

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View the linked Quote via the Cases tile

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



CRM Example Company Abigail Milne

Hope Works 1

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Phone call	20	3	2
Email	30	3	1
Meeting	20	0	2
On Site Inspection	20	1	0
Site inspection	2	0	0

1 Month Performance

4 Month Pipeline

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

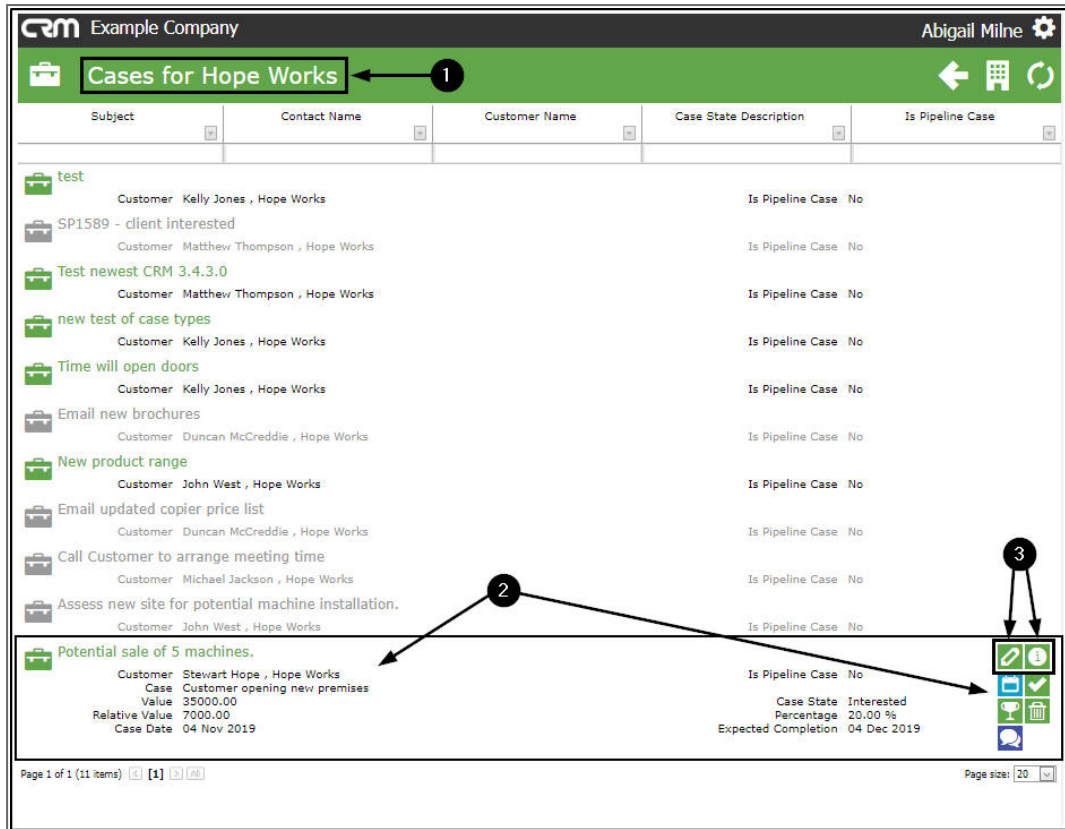
91%

12 Months Sales History

Contract Income Sales Revenue

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1. The **Cases for [selected customer]** listing page will open.
2. **Hover over** the Case to display the **Action buttons**.
3. Click on either the **View/Edit this Case** icon or the **View Case Info and History** icon.

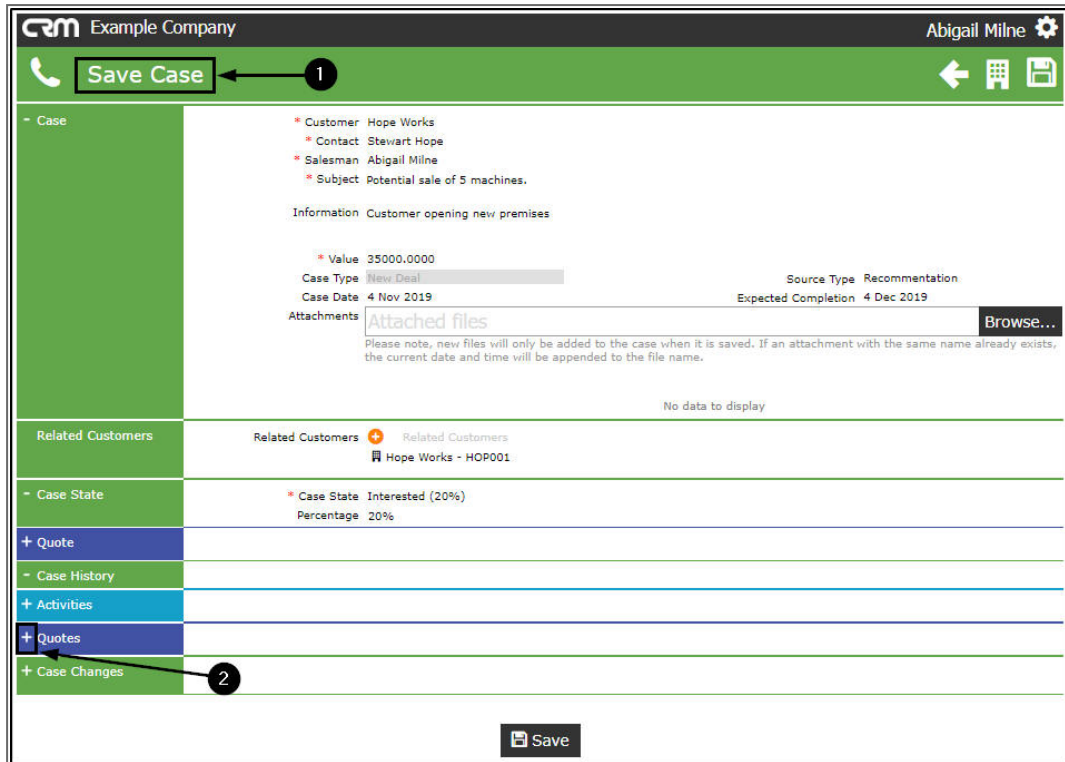


CRM Example Company Abigail Milne

Cases for Hope Works

Subject	Contact Name	Customer Name	Case State Description	Is Pipeline Case
test	Customer: Kelly Jones, Hope Works			No
SP1589 - client interested	Customer: Matthew Thompson, Hope Works			No
Test newest CRM 3.4.3.0	Customer: Matthew Thompson, Hope Works			No
new test of case types	Customer: Kelly Jones, Hope Works			No
Time will open doors	Customer: Kelly Jones, Hope Works			No
Email new brochures	Customer: Duncan McCreddie, Hope Works			No
New product range	Customer: John West, Hope Works			No
Email updated copier price list	Customer: Duncan McCreddie, Hope Works			No
Call Customer to arrange meeting time	Customer: Michael Jackson, Hope Works			No
Assess new site for potential machine installation.	Customer: John West, Hope Works			No
Potential sale of 5 machines.	Customer: Stewart Hope, Hope Works	Case: Customer opening new premises	Case State: Interested	No
	Value: 35000.00	Relative Value: 7000.00	Percentage: 20.00 %	
	Case Date: 04 Nov 2019		Expected Completion: 04 Dec 2019	

Page 1 of 1 (11 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] 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1. The linked Quote can be viewed, edited, copied, accepted or rejected from this **Save Case** page.

Either

2. Click on **Back**

Or

2. Click on the **Customers** icon

to return to the **Customer Dashboard** (Customer Home page).

CRM

Example Company

Abigail Milne

Save Case

* Value

35000.0000

Case Type

New Deal

Case Date

4 Nov 2019

Source Type

Recommendation

Expected Completion

4 Dec 2019

Attachments

Attached files

Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

No data to display

Related Customers

Related Customers

Hope Works - HOP001

Case State

* Case State Interested (20%)

Percentage 20%

+ Quote

- Case History

+ Activities

Quotes

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000217	HOP001	Hope Works	HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No
QT0000217	HOP001	Hope Works	HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

Page 1 of 1 (2 items)

Page size: 10

+ Case Changes

Save

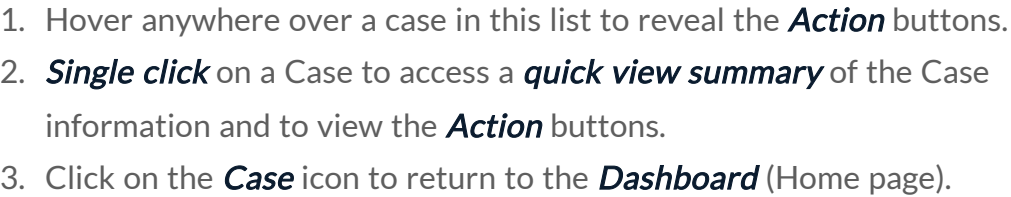
VIEW THE ENTIRE CASE LIST FROM THE DASHBOARD (HOME PAGE)

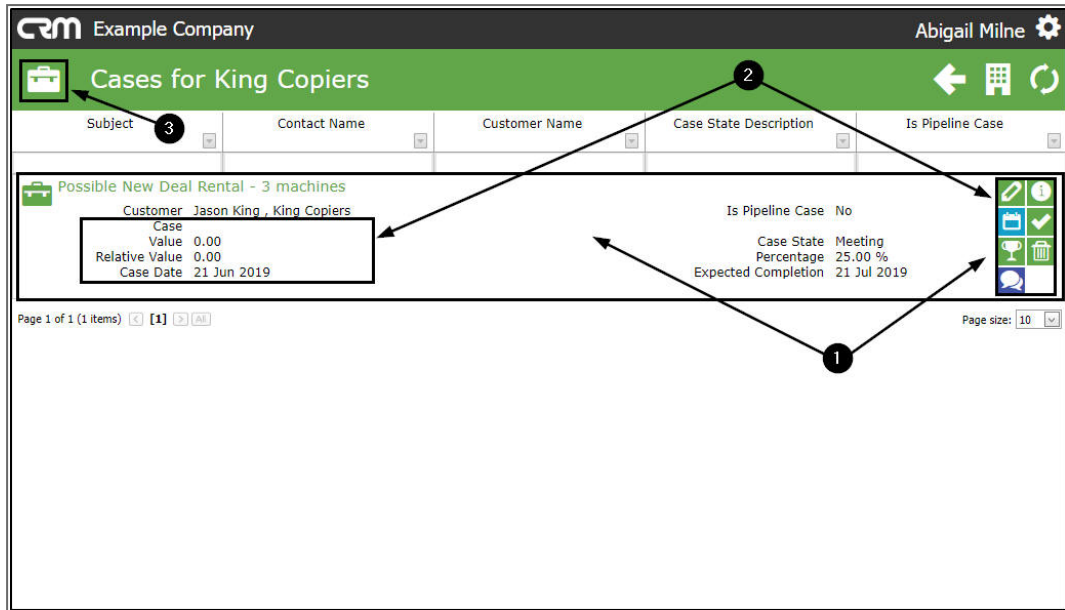
1. In the **Dashboard** (Home page),
2. Click on the **Cases** tile.



THE MY CASES LISTING SCREEN

- The **My Cases** listing page will be displayed.
- Here you can view the entire case list for all customers.





The screenshot shows the CRM interface for 'Example Company' with the user 'Abigail Milne'. The main heading is 'Cases for King Copiers'. Below this is a table with columns: Subject, Contact Name, Customer Name, Case State Description, and Is Pipeline Case. A specific case is highlighted with a green header: 'Possible New Deal Rental - 3 machines'. This case details include: Customer (Jason King, King Copiers), Case Value (0.00), Relative Value (0.00), Case Date (21 Jun 2019), Is Pipeline Case (No), Case State (Meeting), Percentage (25.00 %), and Expected Completion (21 Jul 2019). A sidebar on the right contains icons for editing, deleting, and other actions. Annotations are present: '3' points to the 'Subject' column header, '2' points to the 'Case State Description' column header, and '1' points to the 'Possible New Deal Rental - 3 machines' case entry.

Related Topics

- [CRM Basics: Cases.](#)

CRM.002.004