

CRM CUSTOMERS

THIRD PARTY

Third Party contains information relating to a customer's current (or expired) contract with a third party provider.

This is helpful for the various reasons including the following:

- To know when to contact your client when their third party contract ends / is due to end.
- To know what your client's current **Item(s)** and **Item(s) Usage** charges are, so that when you create a proposal or quote - you can ensure that it is competitive.

In **CRM**, you can access current Third Party information for a customer in **2** different pages:

1. From the CRM **Homepage**. This will direct you to the ***Third Party for [Salesman's Name] Customers*** page:
 - This will list all the salesman's customers that are linked to Third Party contracts. This process is covered in [CRM Basics: Third Party](#).
2. From the **Customer Homepage**. This will direct you to the ***Third Party for [Customer Name]*** page:
 - This will list all the Third Party contracts linked to the selected customer.

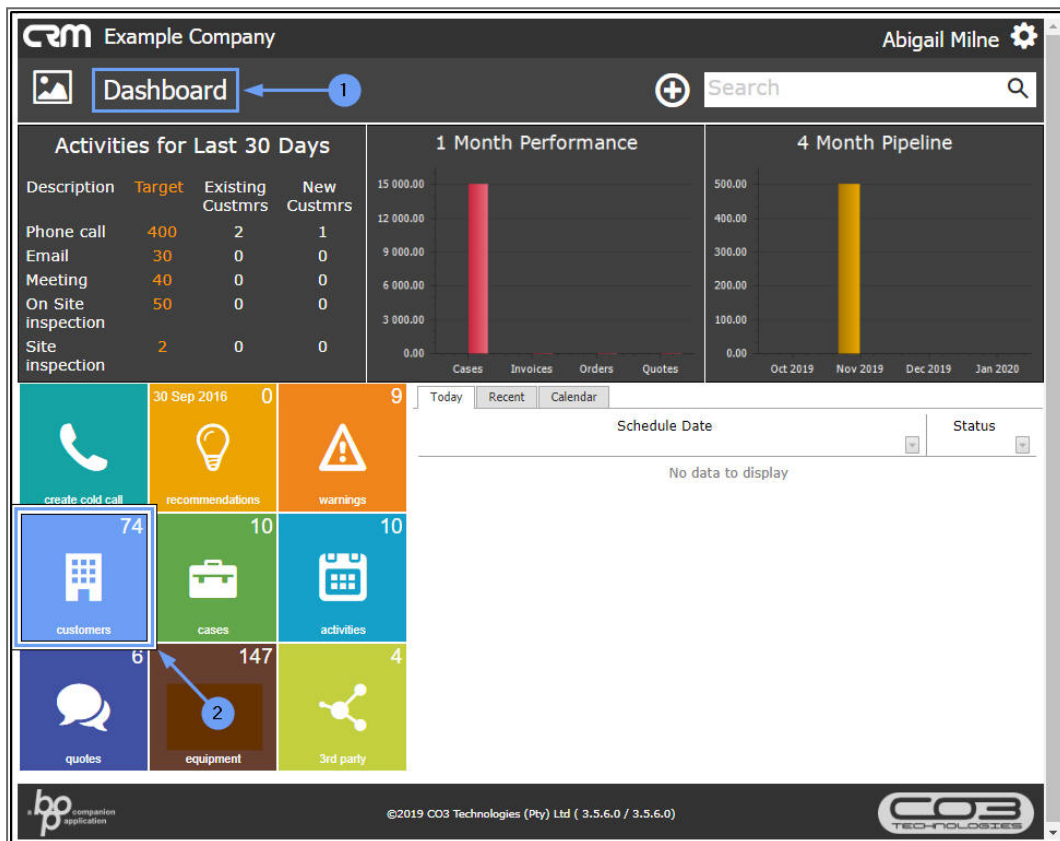
The **2nd** process is covered in *this* manual.

Note: To [Add a new Third Party to a Customer](#), it is quickest to navigate from the Customers (listing) page.

Ribbon Access: Webpage > [http://\[servername\]:\[port-no\]/BPOCRM/User.aspx](http://[servername]:[port-no]/BPOCRM/User.aspx)

ACCESS CURRENT THIRD PARTY INFORMATION FROM THIRD PARTY FOR [CUSTOMER NAME] PAGE

1. In the CRM *Homepage*,
2. Click on the *Customers* tile.



1. The *Customers* page will open.
2. Click on the selected *Customer Logo* 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	0210134508		58%	Released	Bronze	No	Yes
	King Enterprises	KIN0002	Lucy Rowe			50%	Released	Silver	No	Yes
	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	New - CRM	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

Page 4 of 8 (73 items)

[1](#)
[2](#)
[3](#)
[4](#)
[5](#)
[6](#)
[7](#)
[8](#)
[All](#)

Page size: 10

1. The selected **Customer Home page** will open.
2. Click on the **Third Party** tile.



CRM Example Company Abigail Milne

Hope Works ← 1

Hope Works - HOP001

Trading Name: Hope Works 91%
Registered Name: Hope Works (Pty) Ltd
Description:
VAT No: 987654321
Registration: 123456789
Rank: Platinum
Website: <http://www.hopeworks.co.za>
Phone: 031 123 4567

Created: 2014/04/03 1:46:44 PM

12 Months Sales History

January 2018
Contract Income : 0
Sales Revenue : 1843.333333333333

January 2018 : 1843.333333333333

2

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1. The **Third Party for [Customer]** page will open.
2. Here you can view a list of all the Third Party contracts 'Main' Information linked to this specific customer.
3. Click on the expand icons to Quick View the Third Party Item and Quick View the Third Party Item Usage.
4. You can hover over any of these frames to display the Action buttons:
 - View / Edit
 - Delete

Use these buttons to;

- i. View / Add /Edit the Third Party 'main' information,
- ii. View / Add /Edit the Third Party 'item' information,
- iii. View / Add /Edit the Third Party 'item usage' information,

CRM

Example Company

Abigail Milne

⚙️

🔗

Save Third Party

1

⬅️

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- Third Party:

Rental Contract No.

Rental Contract No.

* Third Party Name

Third Party Name

Start Date

1 Jan 1900

End Date

1 Jan 1900

Payment Frequency

Payment Frequency

Escalation Percent

Escalation Percent

Interest Rate

Interest Rate

Comments

Comments

- Item

Item Type

Item Type

* Make

Make

Model

Model

Serial Number

Serial number

Location

Location

Description

Description

Main User

Main User

Office Desk No

Office Desk No

Rental Amount

Rental Amount

Instalment Amount

Instalment Amount

Escalation Percentage

Escalation Percentage

Billing Frequency

Billing Frequency

Finance Party

Finance Party

Finance Collects

Finance Collects

Fixed Service Fee

Fixed Service Fee

Fixed Admin Fee

Fixed Admin Fee

Fixed Insurance

Fixed Insurance

Other Fee 1

Other Fee 1

Other Fee 2

Other Fee 2

+ Item Usage

💾 Save

💾 🔄 Save + New Third Party

⚙️ 💾 Save + New Item

💾 🔄 Save + New Usage

2

↖️

↙️

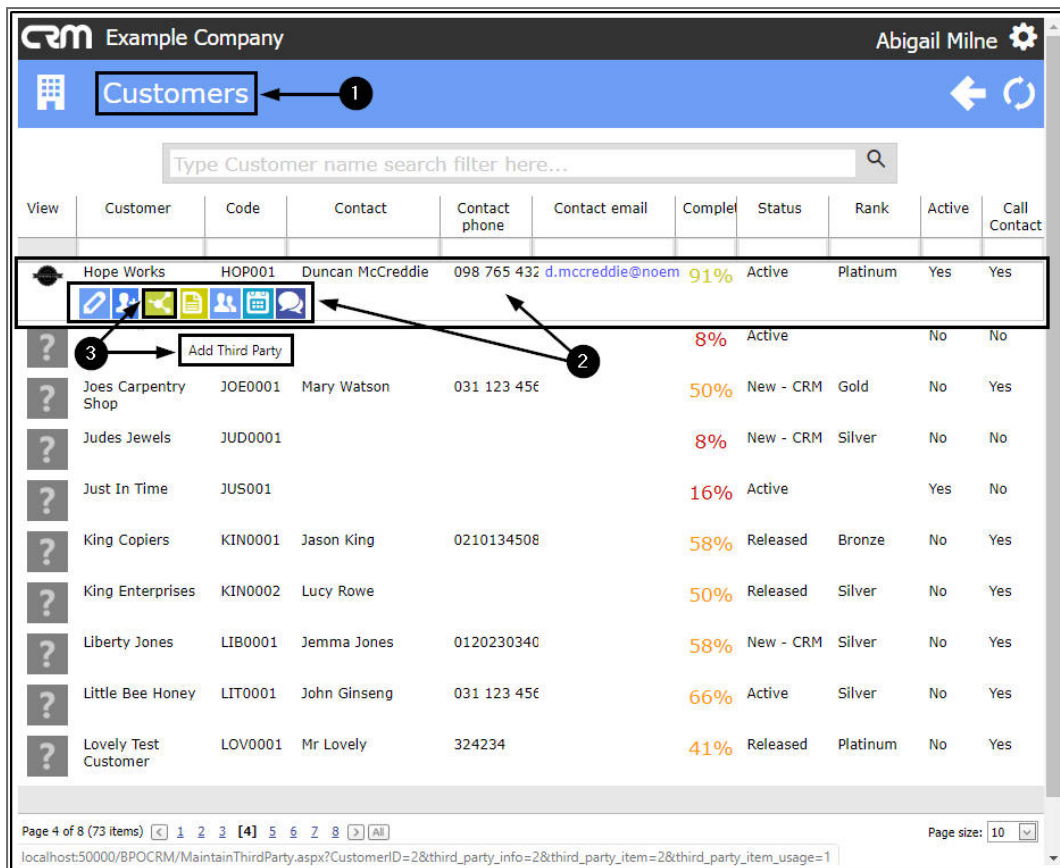
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ADD NEW THIRD PARTY INFORMATION DIRECTLY FROM THE CUSTOMERS (LISTING) PAGE

1. In the CRM *Homepage*,
2. Click on the *Customers* tile.



1. The **Customers** (listing) page will open.
2. Hover over the selected customer until you can view the **Action buttons** panel.
3. Click on the **Add Third Party** button.



The screenshot shows the CRM interface for 'Example Company'. The top navigation bar has a 'Customers' link (1). Below it is a search bar and a table of customers. The first customer, 'Hope Works', has an action menu with an 'Add Third Party' button (2). A bottom navigation bar also has an 'Add Third Party' button (3).

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
	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%	Released	Silver	No	Yes
	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	New - CRM	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

Page 4 of 8 (73 items) [1] [2] [3] [4] [5] [6] [7] [8] [All] Page size: 10

localhost:50000/BPOCRM/MaintainThirdParty.aspx?CustomerID=2&third_party_info=2&third_party_item=2&third_party_item_usage=1

1. The **Save Third Party** page will open.
2. You can now add the new Third Party Main Information, Item Information and Item Usage Information as described in the [Basics: Third Party](#) manual.

CRM

Example Company

Abigail Milne

Save Third Party

1

- Third Party:

Rental Contract No.

Rental Contract No.

* Third Party Name

Third Party Name

Start Date

1 Jan 1900

End Date

1 Jan 1900

Payment Frequency

Payment Frequency

Escalation Percent

Escalation Percent

Interest Rate

Interest Rate

Comments

Comments

- Item

Item Type

Item Type

* Make

Make

Model

Model

Serial Number

Serial number

Location

Location

Description

Description

Main User

Main User

Office Desk No

Office Desk No

Rental Amount

Rental Amount

Instalment Amount

Instalment Amount

Escalation Percentage

Escalation Percentage

Billing Frequency

Billing Frequency

Finance Party

Finance Party

Finance Collects

Finance Collects

Fixed Service Fee

Fixed Service Fee

Fixed Admin Fee

Fixed Admin Fee

Fixed Insurance

Fixed Insurance

Other Fee 1

Other Fee 1

Other Fee 2

Other Fee 2

+ Item Usage

2

Save

Save + New Third Party

Save + New Item

Save + New Usage

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