

CRM CUSTOMERS

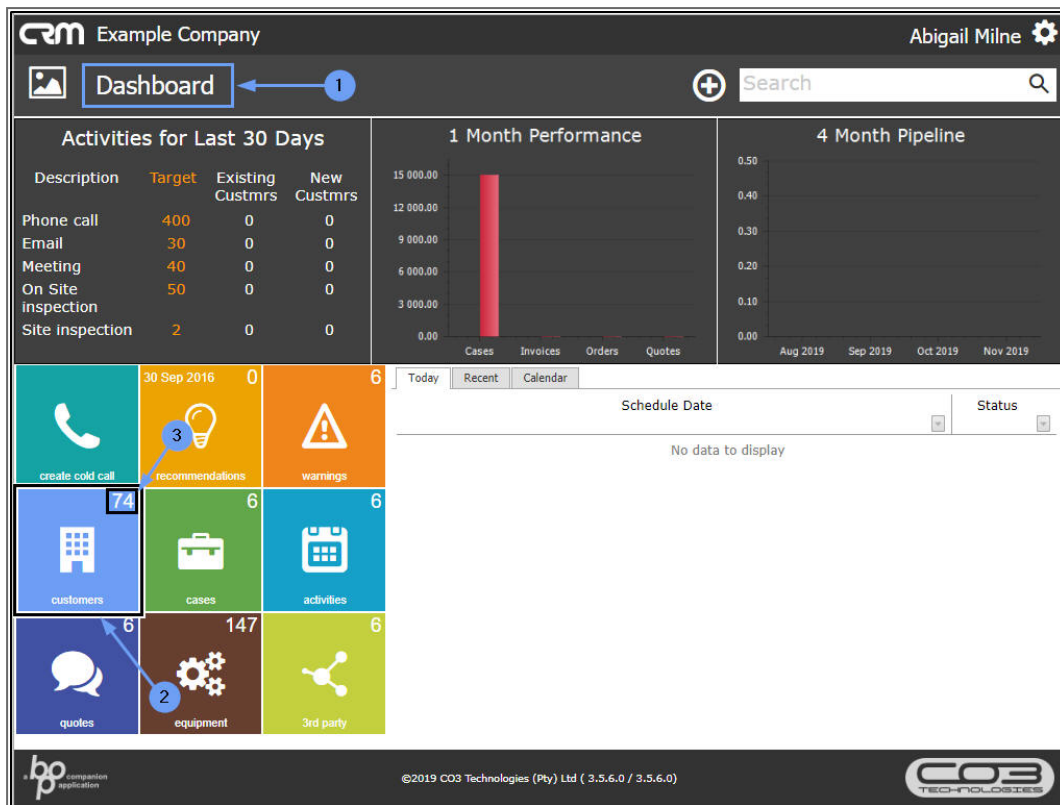
CUSTOMER ACTIONS BUTTONS

You can access and add more customer information to **CRM** using the customer **Action buttons**, available in both the **Customers** listing screen and the **Customer Dashboard** (Customer Home page).

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

NAVIGATE TO THE CUSTOMERS LISTING PAGE:

1. In the **Dashboard** (Home page),
2. Click on the **Customers** tile.
3. **Note:** The number in the top left of the tile indicates how many customers that you are linked to.



1. The **Customers** (listing) page will open.

VIEW ACTIVE OR RELEASED CUSTOMER ACTION BUTTONS

2. **Hover anywhere** in the row of a selected customer.
3. You will note that the customer status in this example is **Active**. (Active and Released customers will display the same Action buttons.)

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 | Matthew Thompson | 031 123 456 | | 75% | 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) Page size: 10

1. The Active customer **Action** buttons will be displayed:

- Edit Customer
- Add Contact
- Add Third Party
- Add Note
- Maintain Customer Salesmen
- New Activity
- New Quote

CRM Example Company Abigail Milne

Customers

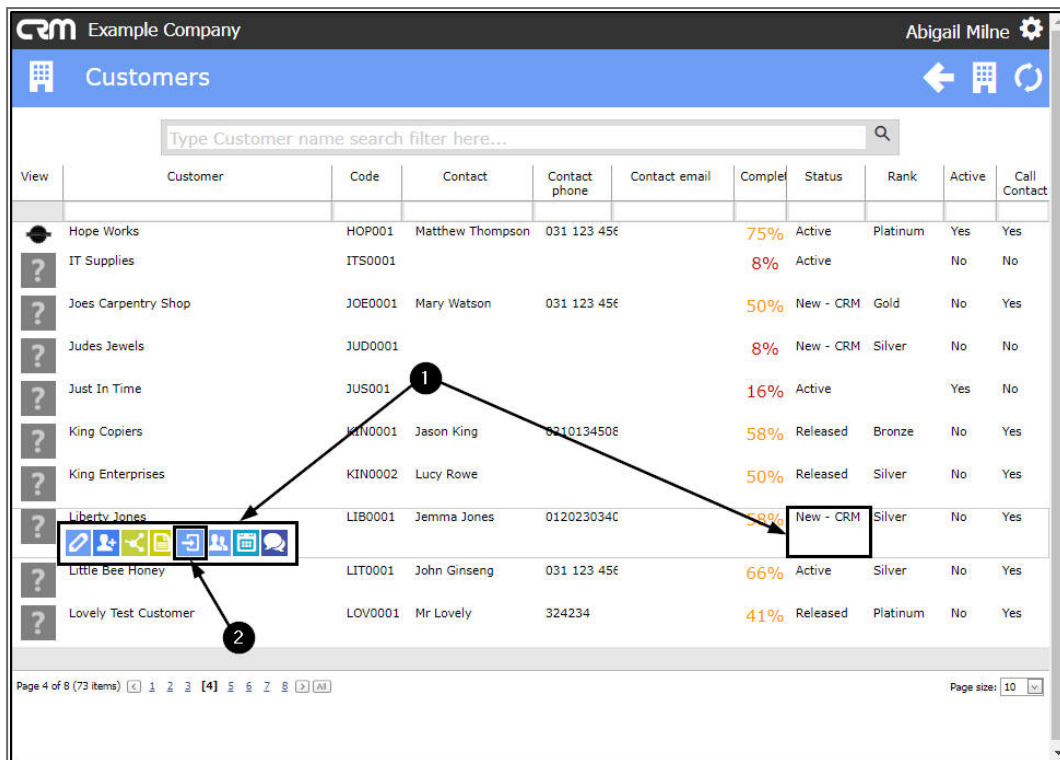
Type Customer name search filter here...

| View | Customer | Code | Contact | Contact phone | Contact email | Comple | Status | Rank | Active | Call Contact |
|------|----------------------|---------|------------------|---------------|---------------|--------|-----------|----------|--------|--------------|
| | Hope Works | HOP001 | Matthew Thompson | 031 123 456 | | 75% | Active | Platinum | Yes | Yes |
| | IT Supplies | ITS0001 | | | | 8% | Active | | No | No |
| | Joels 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% | 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

VIEW NEW-CRM CUSTOMER ACTION BUTTONS

1. **Hover anywhere** in the row of a **New - CRM** customer.
2. With New-CRM customers, the Action buttons displayed will include the **Release Customer** button.

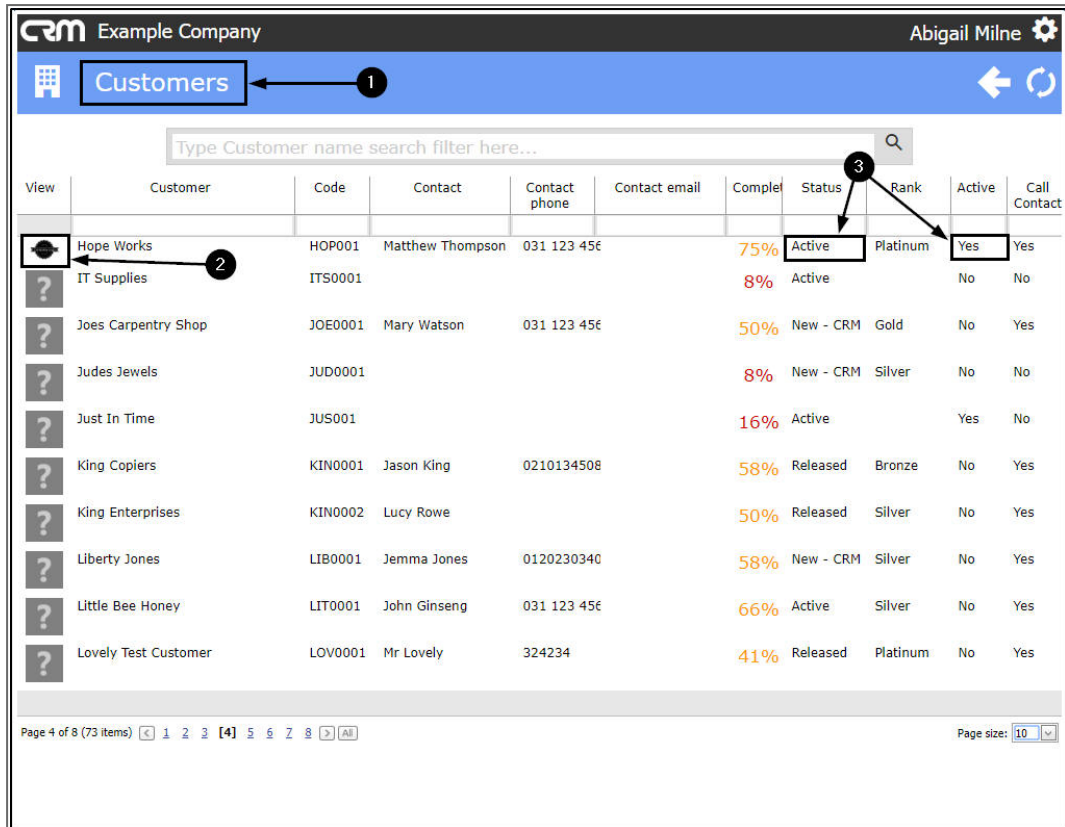












| View | Customer | Code | Contact | Contact phone | Contact email | Comple | Status | Rank | Active | Call Contact |
|------|----------------------|---------|------------------|---------------|---------------|--------|-----------|----------|--------|--------------|
| | Hope Works | HOP001 | Matthew Thompson | 031 123 456 | | 75% | Active | Platinum | Yes | Yes |
| | IT Supplies | ITS001 | | | | 8% | Active | | No | No |
| | Joels 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 |

You can either view and add customer information directly from this **Customers** page or you can navigate to the selected **Customer Dashboard** to view the same buttons.

NAVIGATE TO THE CUSTOMERS DASHBOARD (CUSTOMER HOME PAGE) PAGE:

1. In the **Customers** listing page,
2. Select a specific customer by clicking on the icon next to that customer name, in the **View** column.
3. You will note that the customer selected in this example (Hope Works) is an **Active** customer - this will affect the Action button options that will be available.



| View | Customer | Code | Contact | Contact phone | Contact email | Comple | Status | Rank | Active | Call Contact |
|-----------------------------------------------------------------------------------|----------------------|---------|------------------|---------------|---------------|--------|-----------|----------|--------|--------------|
|  | Hope Works | HOP001 | Matthew Thompson | 031 123 456 | | 75% | 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 |

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Page size: [10](#)

1. The **Customer Dashboard** (Customer Home page) page will open.

Note: If you wish to have more space on this page to view your customer information more clearly, you can change your page **Settings**.

2. This will **hide** the customer dashboard panel.

Select the 'Hide dashboard panel on customer page' setting

3. Click on the **Settings** icon.



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



CRM Example Company Abigail Milne

Hope Works

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 inspection | 50 | 0 | 0 |
| Site 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

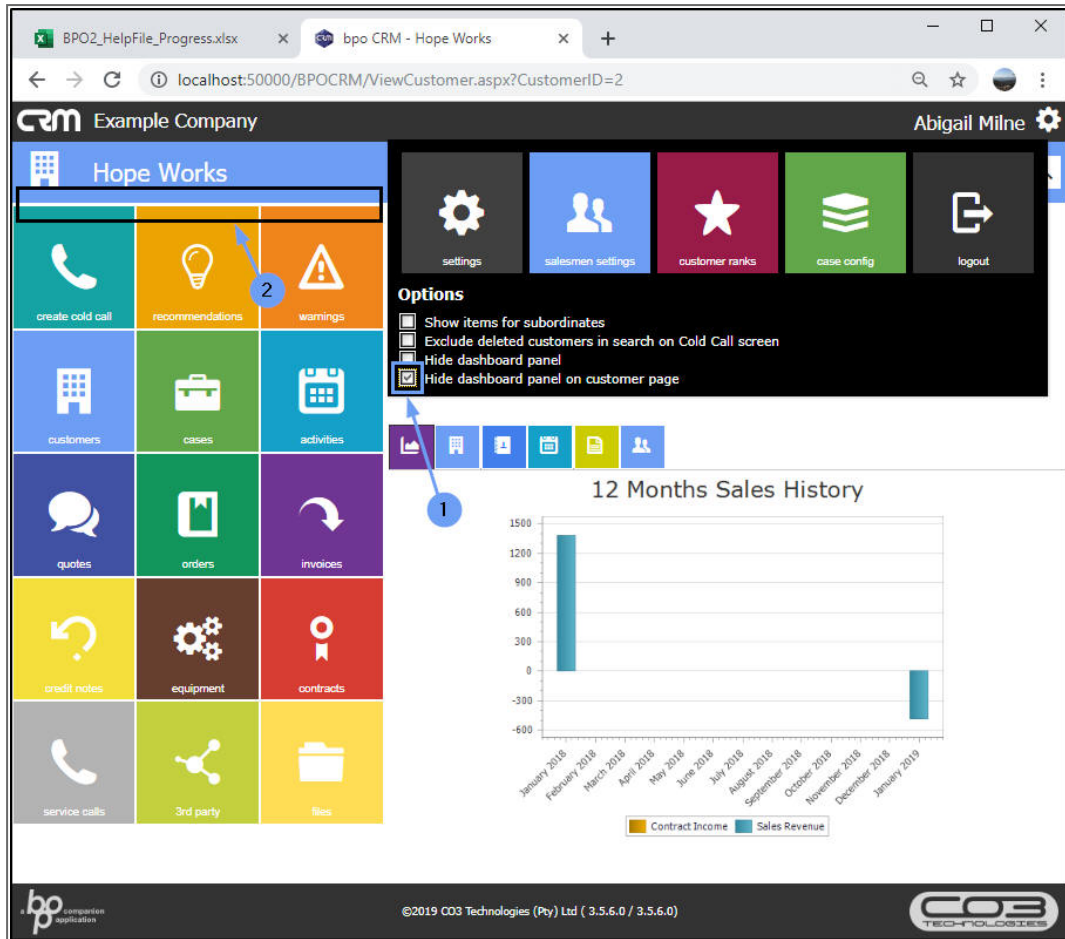
Trading Name: Hope Works 91%
Registered Name: Hope Works (Pty) Lts
Description: VAT No: 987654321
Registration: 123456789
Rank: Platinum
Website: <http://www.hopeworks.co.za>
Phone: 031 123 4567

12 Months Sales History

| Month | Contract Income | Sales Revenue |
|----------------|-----------------|---------------|
| January 2018 | 1200 | 1200 |
| February 2018 | 1200 | 1200 |
| March 2018 | 1200 | 1200 |
| April 2018 | 1200 | 1200 |
| May 2018 | 1200 | 1200 |
| June 2018 | 1200 | 1200 |
| July 2018 | 1200 | 1200 |
| August 2018 | 1200 | 1200 |
| September 2018 | 1200 | 1200 |
| October 2018 | 1200 | 1200 |
| November 2018 | 1200 | 1200 |
| December 2018 | 1200 | 1200 |
| January 2019 | 1200 | 1200 |

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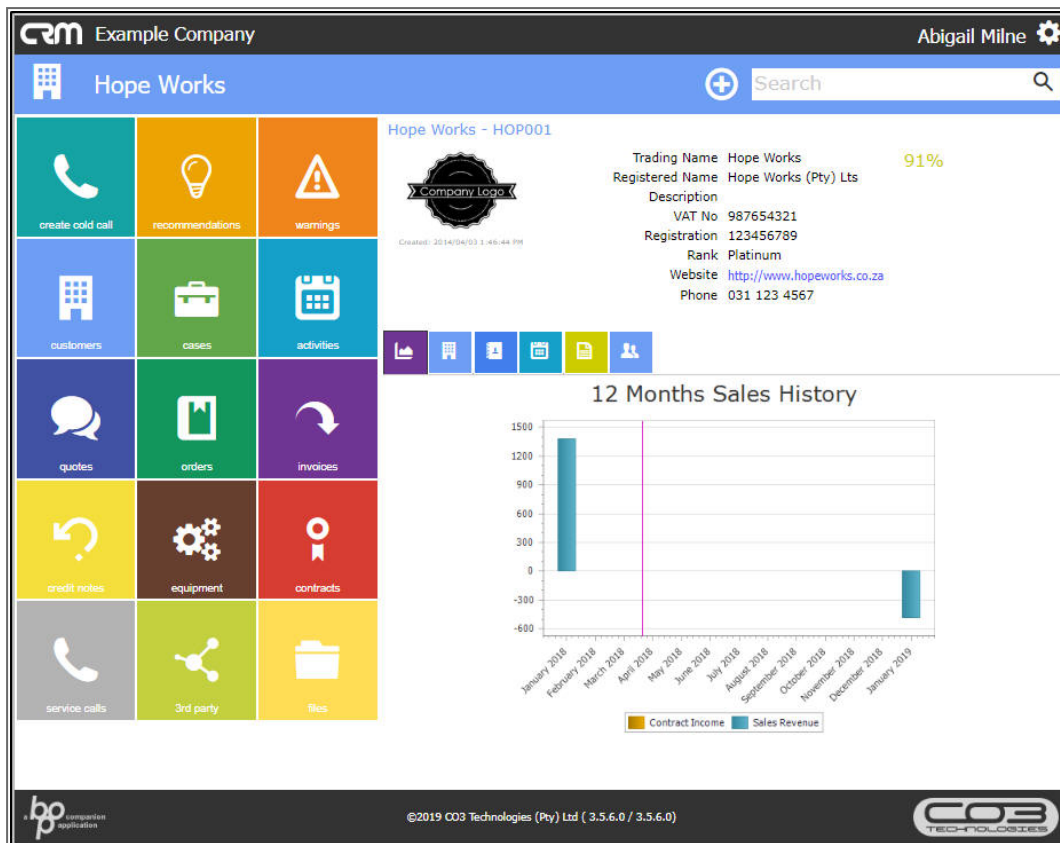
1. As you select the check box,
2. The ***Dashboard panel*** will disappear from the screen.



The screenshot shows the bpo CRM - Hope Works interface. The top navigation bar includes the CO3 logo, the company name "Example Company", and the user name "Abigail Milne". The main dashboard area is divided into two sections. On the left is a grid of action buttons for various functions: create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files. On the right is a settings panel with a gear icon and a list of options: "Show items for subordinates", "Exclude deleted customers in search on Cold Call screen", "Hide dashboard panel", and "Hide dashboard panel on customer page". A blue arrow labeled "1" points to the "Hide dashboard panel" option, and another blue arrow labeled "2" points to the "recommendations" button in the grid. Below the settings panel is a "12 Months Sales History" bar chart showing "Contract Income" (yellow) and "Sales Revenue" (blue) from January 2018 to January 2019. The chart shows a significant increase in sales revenue in January 2019.

| Month | Contract Income | Sales Revenue |
|----------------|-----------------|---------------|
| January 2018 | 1300 | 0 |
| February 2018 | 0 | 0 |
| March 2018 | 0 | 0 |
| April 2018 | 0 | 0 |
| May 2018 | 0 | 0 |
| June 2018 | 0 | 0 |
| July 2018 | 0 | 0 |
| August 2018 | 0 | 0 |
| September 2018 | 0 | 0 |
| October 2018 | 0 | 0 |
| November 2018 | 0 | 0 |
| December 2018 | 0 | 0 |
| January 2019 | 0 | 400 |

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



VIEW CUSTOMER INFORMATION: ACTION BUTTONS

1. Hover anywhere over the Customer Information frame to display the **Action buttons**.
 - Edit Customer
 - Add Contact
 - Add Third Party
 - Add Note
 - Maintain Customer Salesman
 - Create Cold Call
 - New Activity
 - New Quote
2. **Hover over** a specific Action button to display that button description:

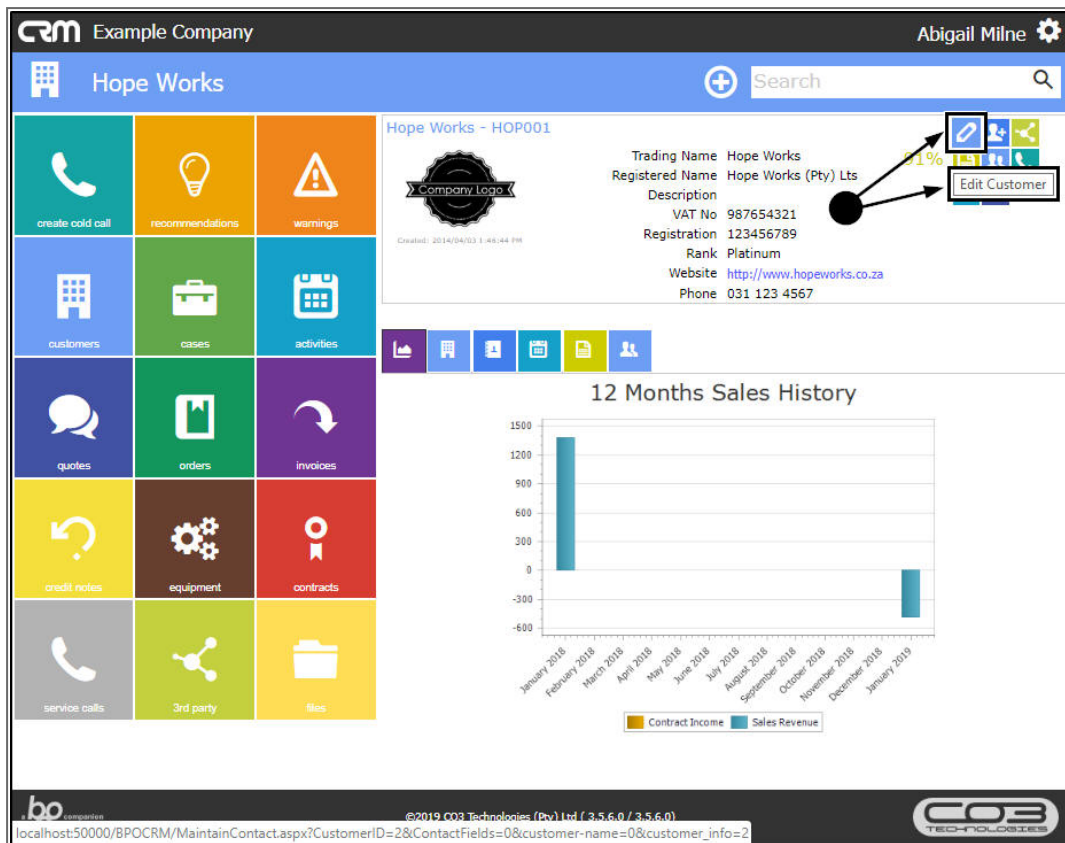
Note: You can single click on the Customer Information frame to keep the Action buttons consistently displayed in this frame.



The screenshot displays the CO3 CRM interface for a customer named 'Hope Works'. The top navigation bar shows the user 'Abigail Milne' and a search bar. The left sidebar contains various action buttons such as 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The main content area shows the customer details for 'Hope Works - HOP001', including trading name, registered name, VAT number, registration number, rank, website, and phone number. A '12 Months Sales History' chart is displayed below the details, showing 'Contract Income' and 'Sales Revenue' from January 2018 to January 2019. Arrows indicate that clicking on the 'Company Logo' (labeled 2) or the 'New Activity' button (labeled 1) will keep the action buttons consistently displayed in the sidebar.

EDIT CUSTOMER

- Click on the **Edit Customer** action button.



CRM Example Company Abigail Milne

Hope Works Search

Hope Works - HOP001

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

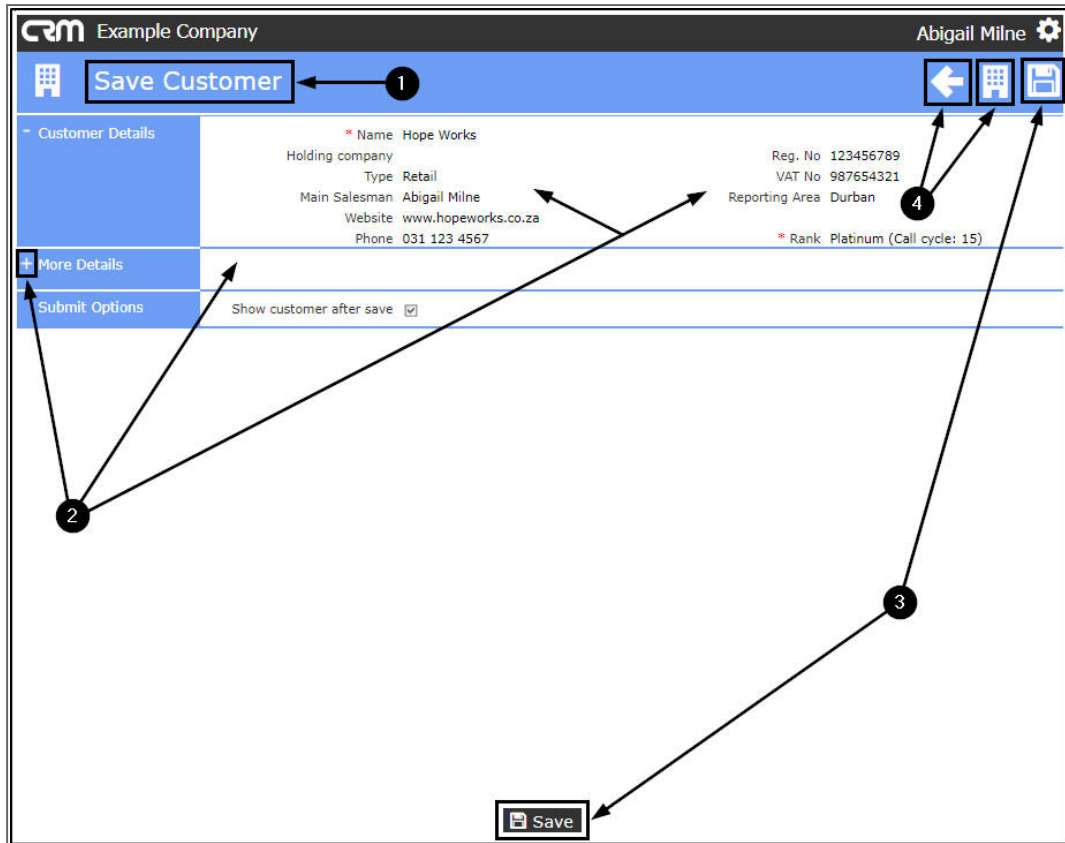
12 Months Sales History

| Month | Contract Income | Sales Revenue |
|----------------|-----------------|---------------|
| January 2018 | 1300 | 0 |
| February 2018 | 0 | 0 |
| March 2018 | 0 | 0 |
| April 2018 | 0 | 0 |
| May 2018 | 0 | 0 |
| June 2018 | 0 | 0 |
| July 2018 | 0 | 0 |
| August 2018 | 0 | 0 |
| September 2018 | 0 | 0 |
| October 2018 | 0 | 0 |
| November 2018 | 0 | 0 |
| December 2018 | 0 | 0 |
| January 2019 | 0 | -400 |

Contract Income Sales Revenue

localhost:50000/BPOCRM/MaintainContact.aspx?CustomerID=2&ContactFields=0&customer-name=0&customer_info=2

1. The **Save Customer** page will open.
2. In this page you can expand the **More Details** frame and add to or edit the customer details, as required.
3. When you are done, you can either **Save** any changes made,
4. Or click on either the **Back** icon or the **Customer** icon to return to the previous/Customer page.



The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The form is titled 'Save Customer' (callout 1). It contains a 'Customer Details' section with fields for Name, Holding company, Type, Main Salesman, Website, and Phone. A 'More Details' section (callout 2) is expanded, showing 'Submit Options' and a checkbox for 'Show customer after save'. A 'Save' button (callout 3) is at the bottom. A top navigation bar (callout 4) contains icons for back, list, and save.

CRM Example Company Abigail Milne

Save Customer 1

Customer Details

* Name Hope Works
Holding company
Type Retail
Main Salesman Abigail Milne
Website www.hopeworks.co.za
Phone 031 123 4567

Reg. No 123456789
VAT No 987654321
Reporting Area Durban

* Rank Platinum (Call cycle: 15)

More Details 2

Submit Options

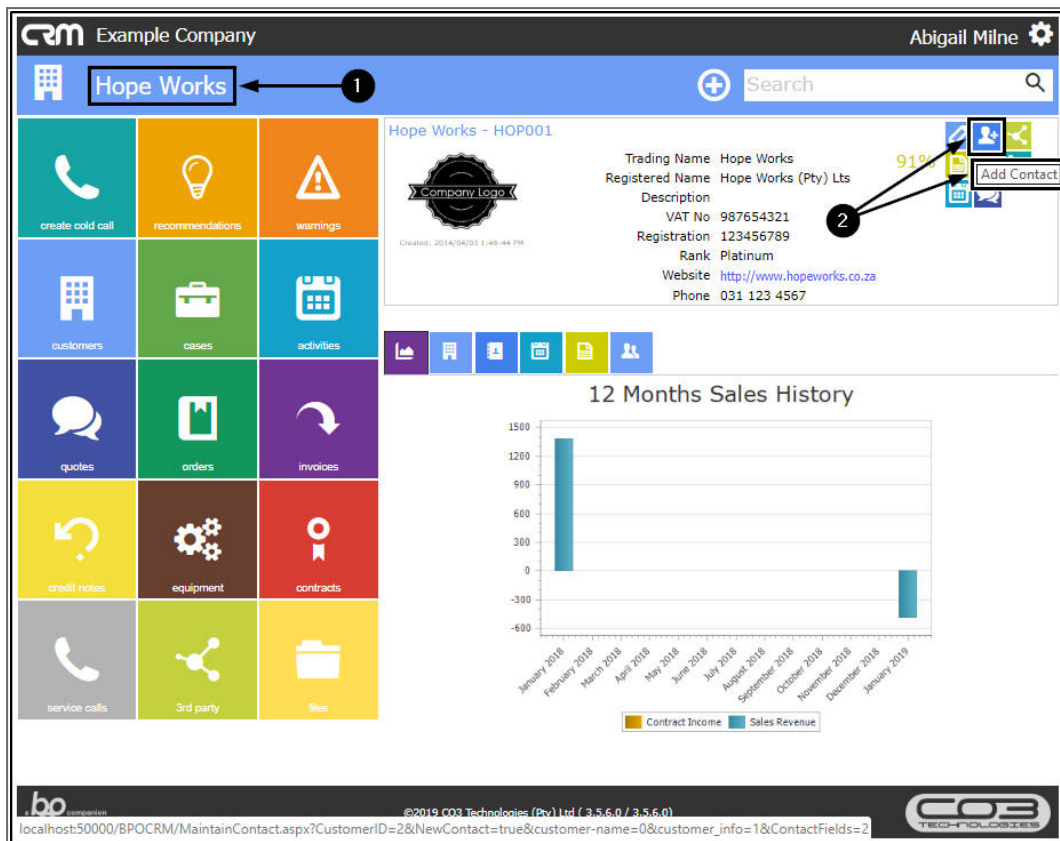
Show customer after save ☒

Save 3

4

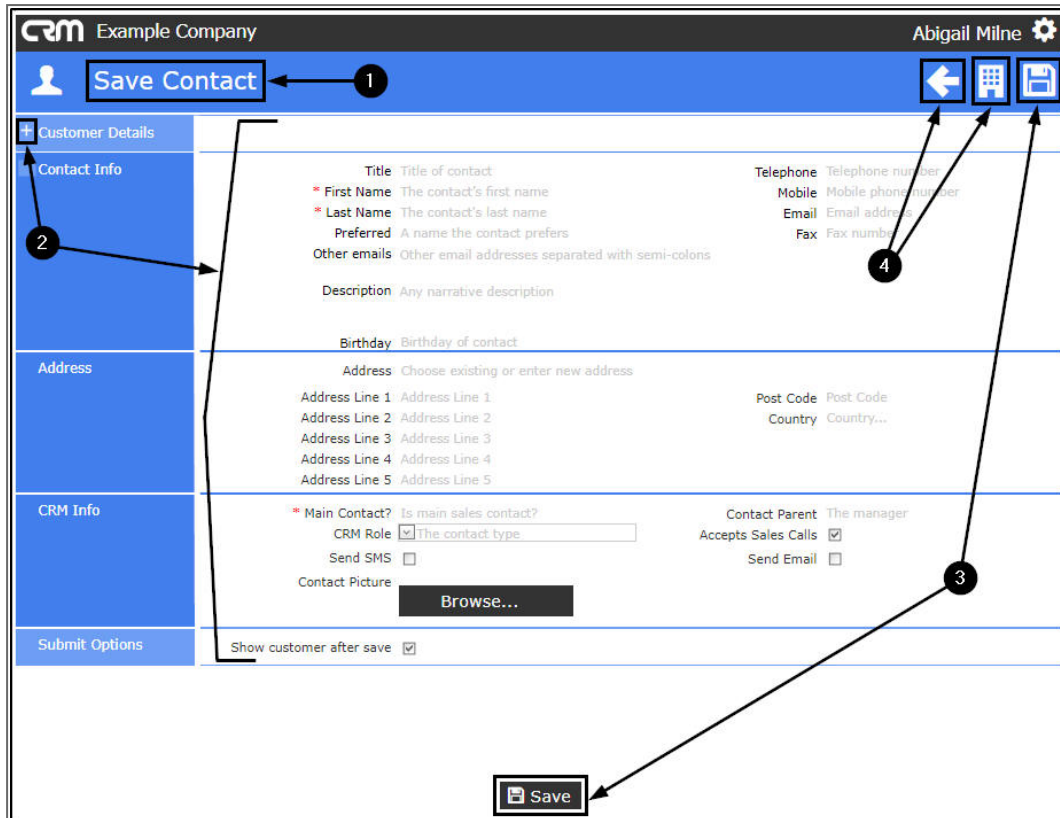
ADD CONTACT

1. In the **Customer** home page,
2. Click on the **Add Contact** action button.



The screenshot shows the CO3 CRM interface for 'Example Company'. The top navigation bar includes the company name and the user 'Abigail Milne'. A left sidebar contains various action buttons. The main content area displays the 'Hope Works - HOP001' profile. A callout box labeled '2' points to the 'Add Contact' button in the top right corner.

1. The **Save Contact** page will open.
2. In this page you can expand the **Customer Details** frame and add to or edit the contact details, as required.
3. When you are done, you can either **Save** any changes made,
4. Or click on either the **Back** icon or the **Customer** icon to return to the previous/Customer page.

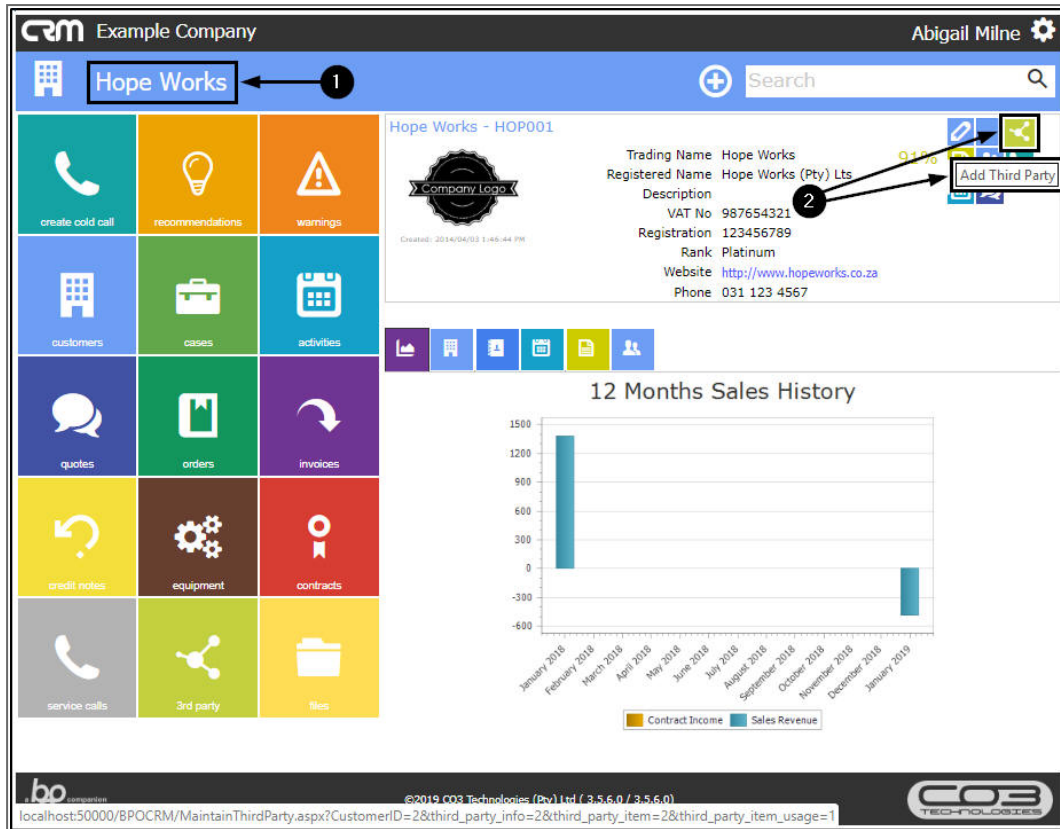


The screenshot shows a CRM interface for 'Example Company' with a user 'Abigail Milne'. The form is titled 'Save Contact' and has a sidebar with sections: Customer Details, Contact Info, Address, CRM Info, and Submit Options. The main form area contains fields for contact information, address, and CRM settings. Numbered callouts indicate the following elements:

- 1**: Points to the 'Save Contact' title bar.
- 2**: Points to the 'Contact Info' section in the sidebar.
- 3**: Points to the 'Save' button at the bottom of the form.
- 4**: Points to the 'Telephone' field in the 'Contact Info' section.

ADD THIRD PARTY

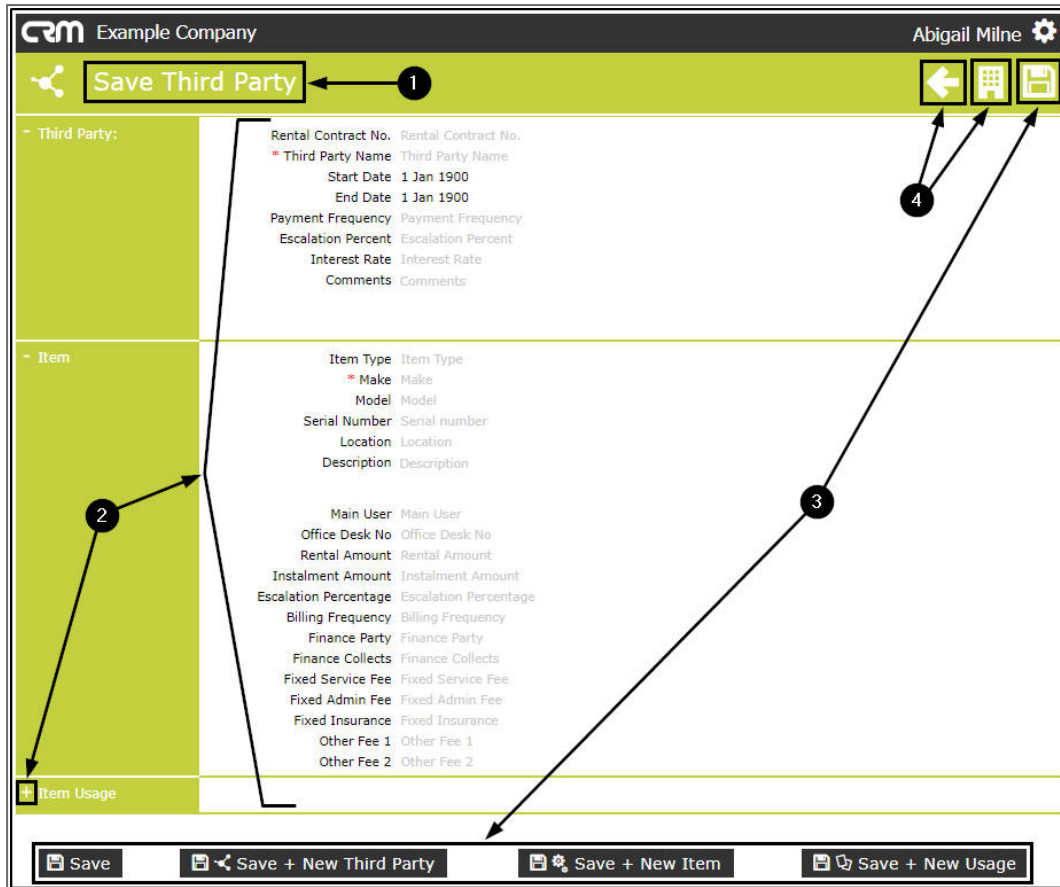
1. In the *Customer* home page,
2. Click on the *Add Third Party* action button.



The screenshot shows the CO3 CRM interface for a customer named 'Hope Works'. The interface includes a top navigation bar with the customer name and a search bar. A left sidebar contains various action buttons. The main content area displays the customer's details, including trading name, registered name, VAT number, registration number, rank, website, and phone number. A '12 Months Sales History' bar chart is also shown. A callout box labeled '2' points to the 'Add Third Party' button in the top right corner.

1. The **Save Third Party** page will open. This page is for main information regarding the Third Party and the contract details.
2. In this page you can expand the **Item Usage** frame and add to or edit the third party details, as required.
3. When you are done, you can either select one of the **Save options** to keep any changes made,
4. Or click on either the **Back** icon or the **Customer** icon to return to the previous/Customer page.

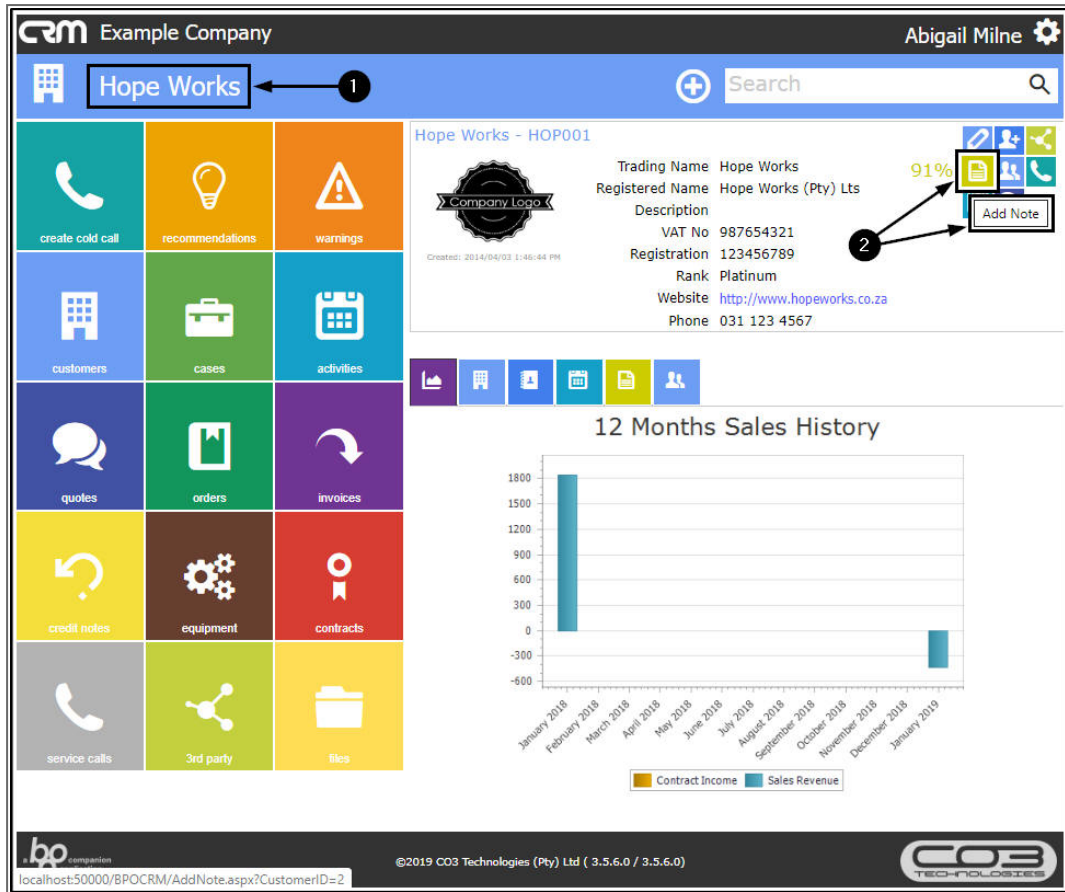
Note: You may not have all the third party information, but CRM provides fields for all relevant contract information. Fields with a red asterisk (*) are mandatory.



The screenshot shows a CRM interface for 'Example Company' with a user 'Abigail Milne'. The form is titled 'Save Third Party' and contains several sections: 'Third Party', 'Item', and 'Item Usage'. The 'Third Party' section includes fields for Rental Contract No., Third Party Name, Start Date, End Date, Payment Frequency, Escalation Percent, Interest Rate, and Comments. The 'Item' section includes fields for Item Type, Make, Model, Serial Number, Location, and Description. The 'Item Usage' section includes fields for Main User, Office Desk No., Rental Amount, Instalment Amount, Escalation Percentage, Billing Frequency, Finance Party, Finance Collects, Fixed Service Fee, Fixed Admin Fee, Fixed Insurance, Other Fee 1, and Other Fee 2. The form has a bottom bar with buttons: 'Save', 'Save + New Third Party', 'Save + New Item', and 'Save + New Usage'. Numbered callouts are as follows: 1 points to the 'Save Third Party' title; 2 points to the 'Item' section; 3 points to the 'Save + New Item' button; and 4 points to the 'Save + New Usage' button.

ADD NOTE

1. In the **Customer** home page,
2. Click on the **Add Note** action button.



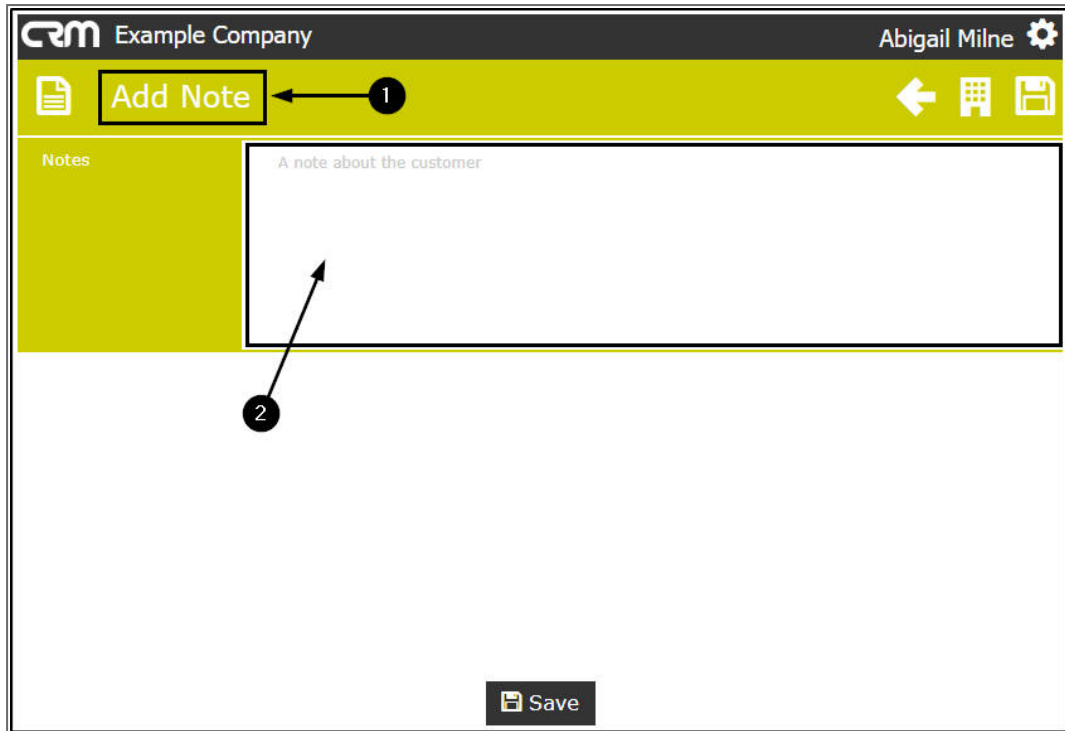
The screenshot displays the CO3 CRM interface for a customer named 'Hope Works'. The interface is divided into several sections:

- Top Navigation Bar:** Shows the user 'Abigail Milne' and a search bar.
- Left Sidebar:** Contains a grid of action buttons for various CRM functions such as 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'.
- Customer Profile Section:** Displays details for 'Hope Works - HOP001', including a company logo, trading name, registered name, description, VAT number, registration number, rank, website, and phone number. A '91%' completion indicator is shown.
- 12 Months Sales History Chart:** A bar chart showing 'Contract Income' (yellow) and 'Sales Revenue' (blue) from January 2018 to January 2019. The Y-axis ranges from -600 to 1800.
- Bottom Footer:** Includes the CO3 Technologies logo, copyright information, and a URL: `localhost:50000/BPOCRM/AddNote.aspx?CustomerID=2`.

Two numbered annotations are present:

- Annotation 1 points to the 'Hope Works' tab in the top navigation bar.
- Annotation 2 points to the 'Add Note' button in the top right corner of the customer profile section.

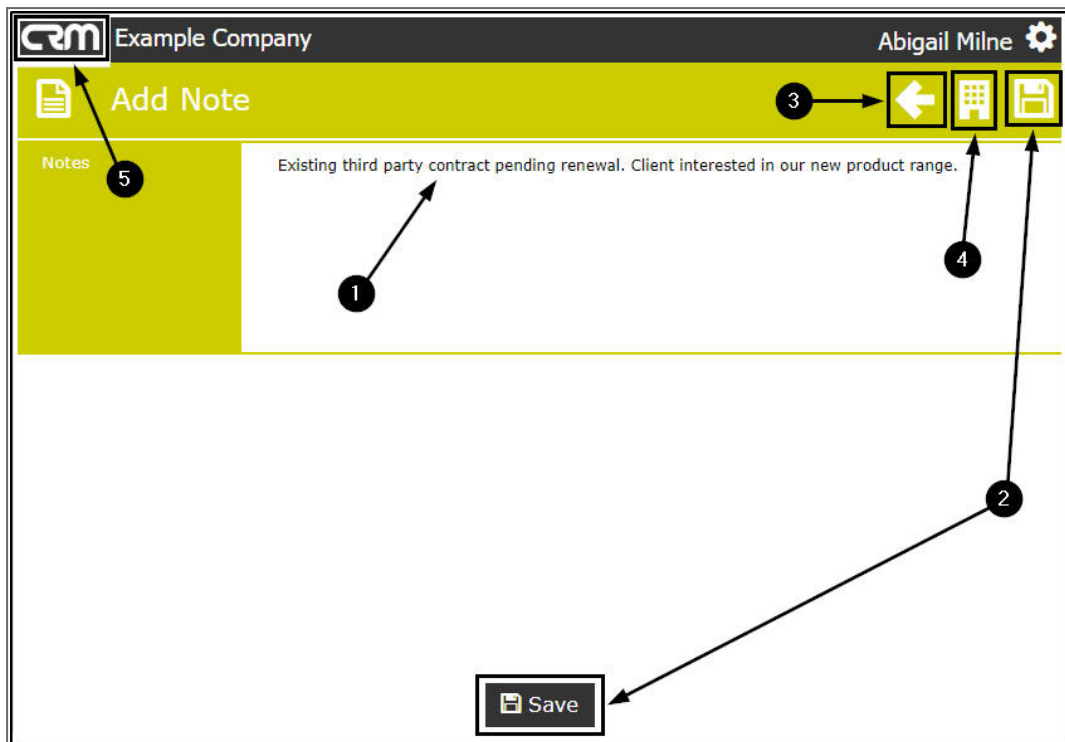
1. The **Add Note** page will open.
2. Type in a note about the customer in the frame outlined.



The screenshot shows a CRM interface for 'Example Company' with a user 'Abigail Milne'. A yellow header bar contains an 'Add Note' button (labeled 1) and navigation icons. Below the header is a text area for the note (labeled 2) and a 'Save' button at the bottom.

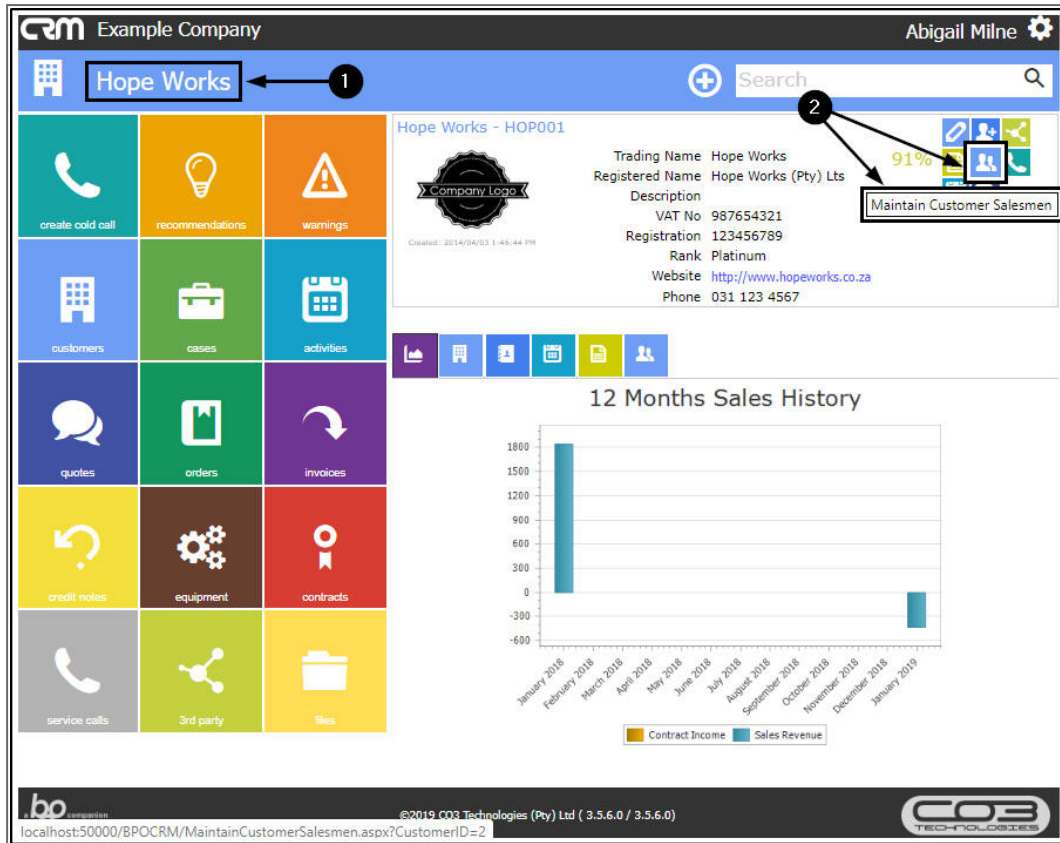
1. When you have typed in the required note,
Either,
2. Click on **Save**, the note will be saved and you will return to the Customer home page.
Or, if you do not wish to save the note:
3. Click on **Back** to return to the previous page,
or,
4. Click on the **Customer icon** to return to the Customer home page,
or,
5. Click on the **CRM logo** to return to the Dashboard (Home page).

Note: You can [view this note](#) (and any other notes linked to this customer) by clicking on the Notes Detail tile in the Customer home page.



MAINTAIN CUSTOMER SALESMEN

1. In the *Customer* home page,
2. Click on the *Maintain Customer Salesmen* action button.



CRM Example Company Abigail Milne

Hope Works ← 1

Search 2

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%

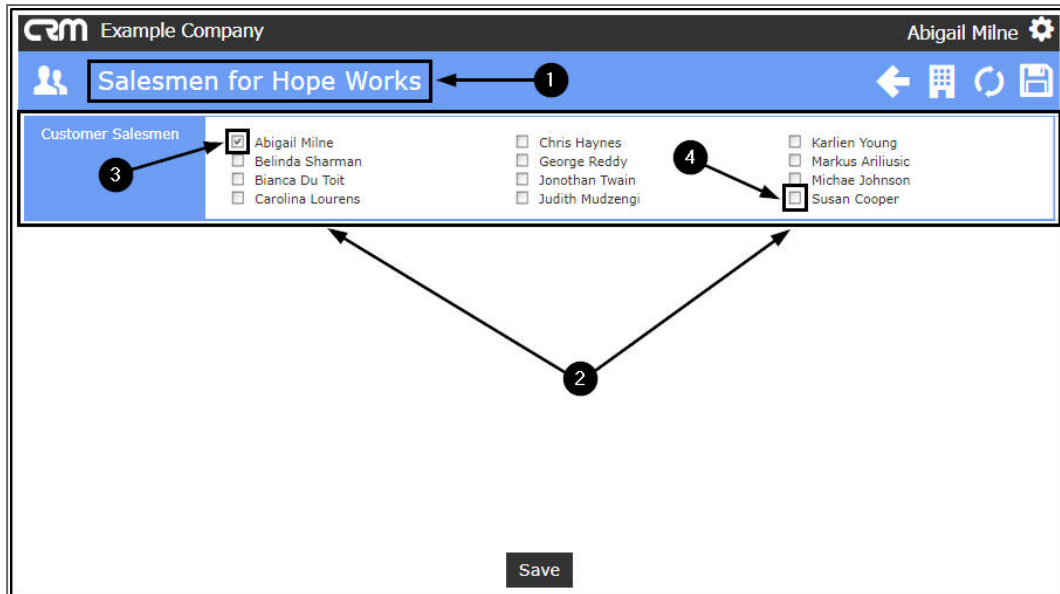
Maintain Customer Salesmen

12 Months Sales History

Contract Income Sales Revenue

localhost:50000/BPOCRM/MaintainCustomerSalesmen.aspx?CustomerID=2

1. The **Salesmen for [Customer]** page will open.
2. Here you can view a list of all the company salespersons (currently set up on the system).
3. The names that have a **ticked** check box in front are currently linked to this customer.
4. To link another salesman, **select** the check box in front of that salesman's name.



When you have finished making the required changes,

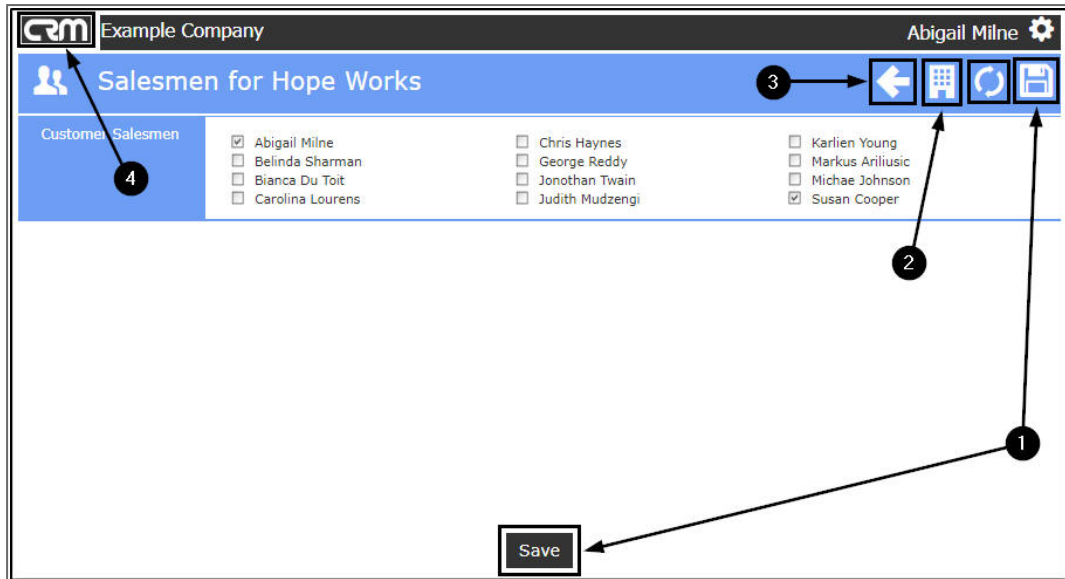
Either,

1. Click on **Save**, your changes will be saved and you will return to the Customer home page.

Or, if you do not wish to save your changes:

2. Click on **Back** to return to the previous page,
or,
3. Click on the **Customer icon** to return to the Customer home page,
or,
4. Click on the **CRM logo** to return to the Dashboard (Home page).

Note: You can **view the customer salesmen** by clicking on the Salesman Details tile in the Customer home page.

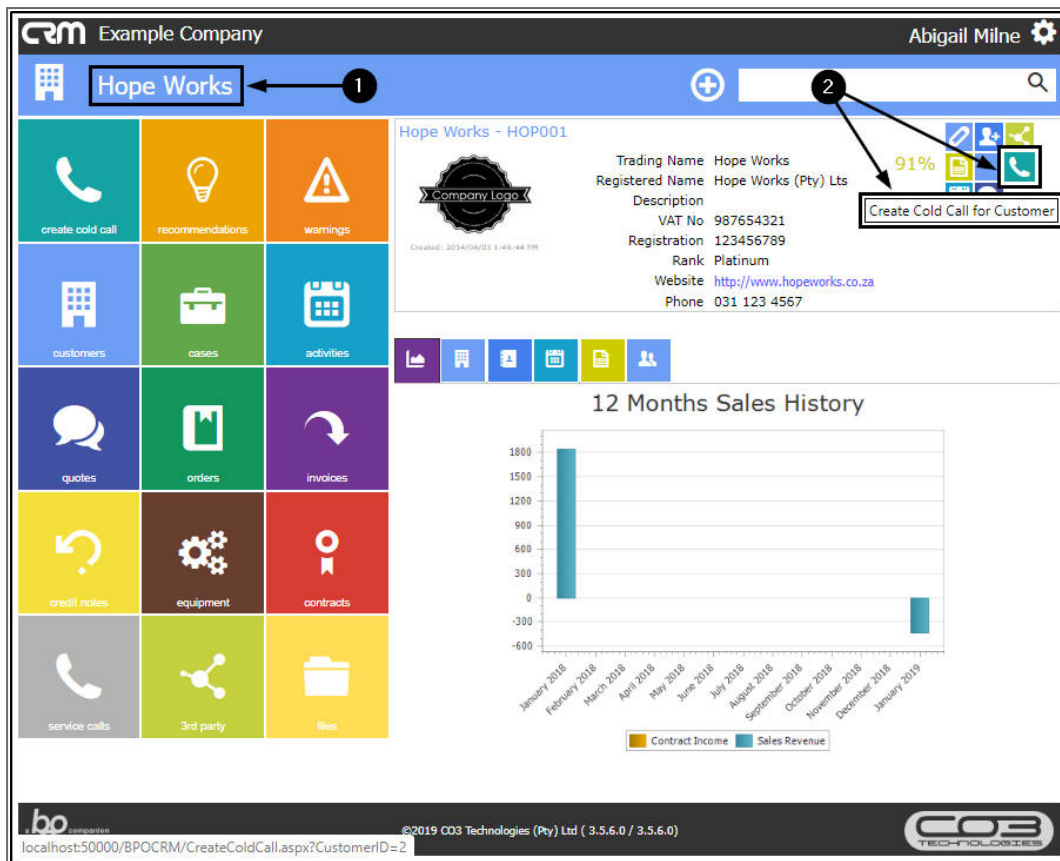


CUSTOMER DETAILS - ACTION ITEMS

CREATE COLD CALL FOR CUSTOMER

This will enable creating a cold call specifically for this customer.

1. In the **Customer** Home page,
2. Click on the **Create Cold Call for Customer** action button.



The screenshot shows the CO3 CRM interface for a customer named 'Hope Works'. The top navigation bar includes the company name 'Example Company' and the user 'Abigail Milne'. The left sidebar contains a grid of action buttons. The main content area displays the customer's details, including trading name, registered name, VAT number, registration number, rank, website, and phone number. A '12 Months Sales History' bar chart is also shown. A callout box highlights the 'Create Cold Call for Customer' button.

1. The Create Cold call page will open.
2. As this is a cold call created for this existing customer, you will note that the Customer frame will already be populated with this customer's details.
3. Complete the remaining cold call details as required. Refer to **Creating a Cold Call** for more information/directions.

When you have finished making the required changes,

Either,

4. Click on **Save**, your cold call information will be saved and you will return to the Customer home page.

Or, if you do not wish to save your changes:

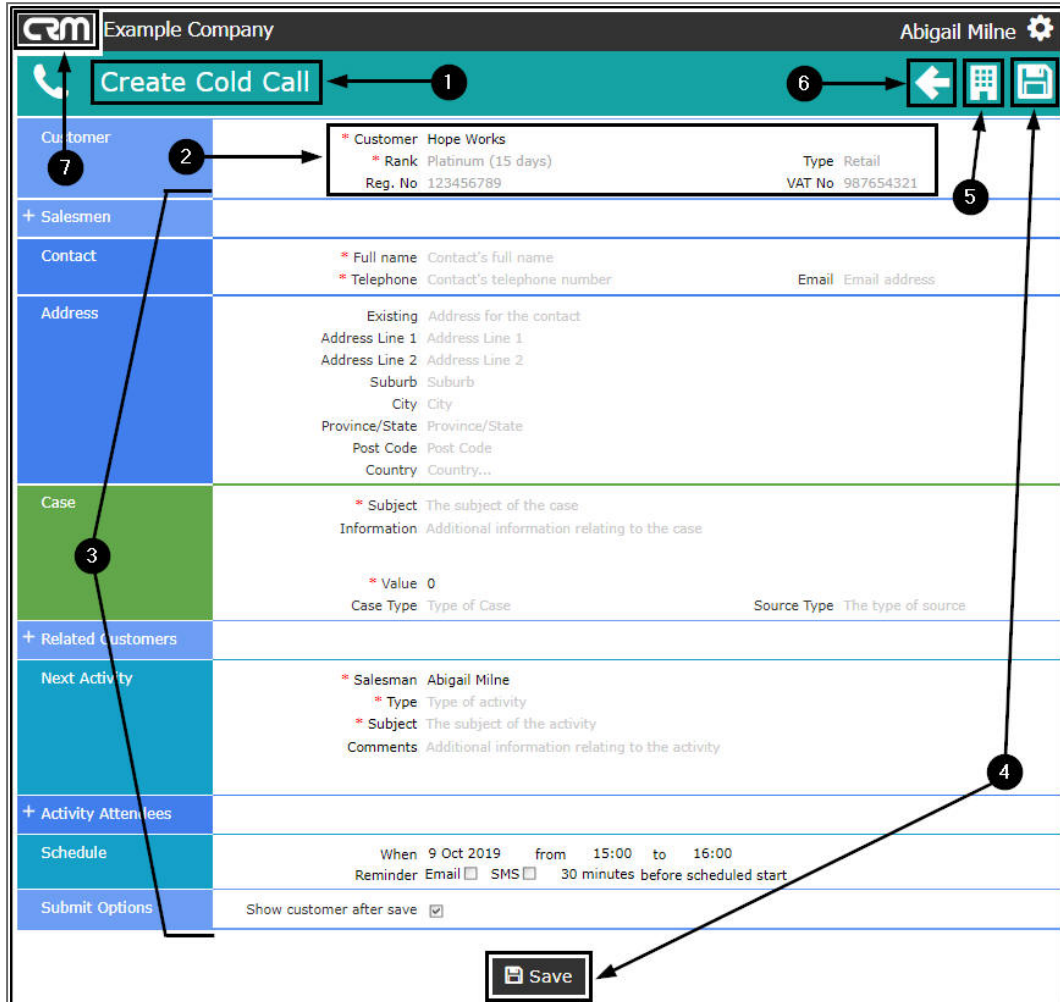
5. Click on the **Customer icon** to return to the Customer home page,

or,

6. Click on **Back** to return to the previous page,

or,

7. Click on the **CRM logo** to return to the Dashboard (Home page).

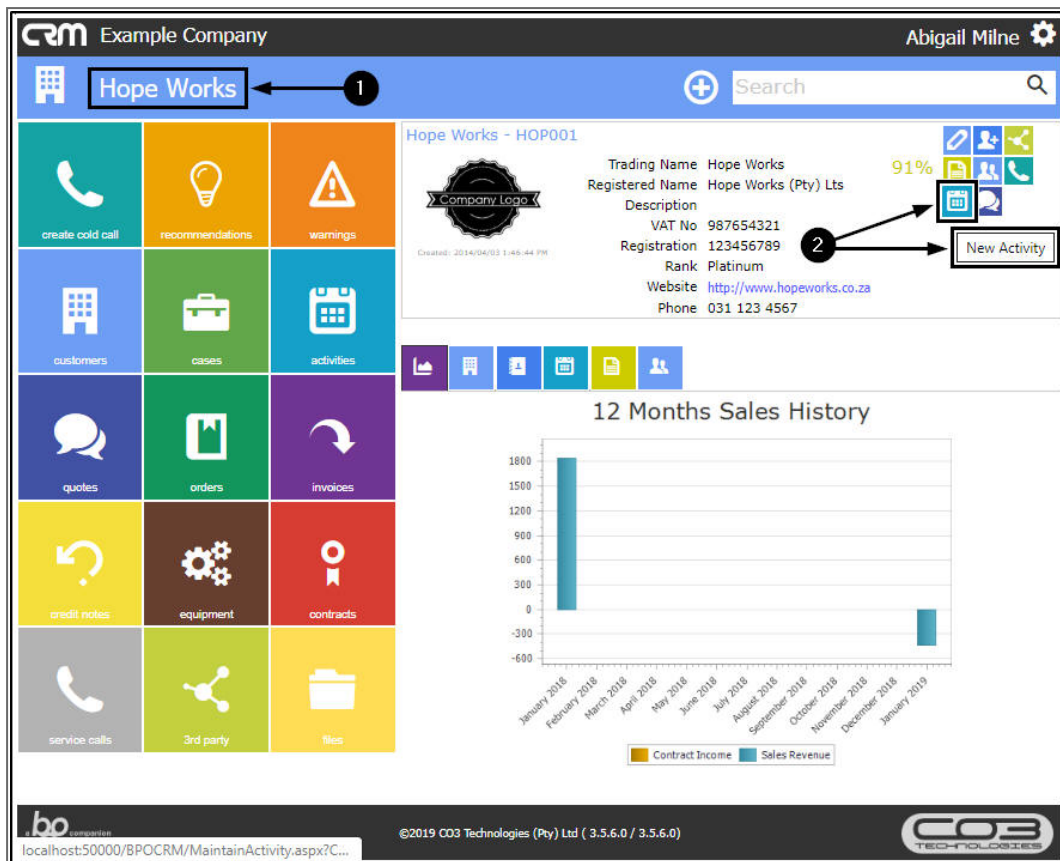


The screenshot shows the 'Create Cold Call' form in the CRM system. The form is titled 'Create Cold Call' and is part of the 'Example Company' interface. The user 'Abigail Milne' is logged in. The form contains several sections: 'Customer' (with fields for Customer, Rank, Reg. No, Type, and VAT No), 'Salesmen' (with a dropdown for Salesmen), 'Contact' (with fields for Full name, Telephone, and Email), 'Address' (with fields for Existing, Address Line 1, Address Line 2, Suburb, City, Province/State, Post Code, and Country), 'Case' (with fields for Subject, Information, Value, Case Type, and Source Type), 'Related Customers' (with a dropdown for Related Customers), 'Next Activity' (with fields for Salesman, Type, Subject, and Comments), 'Activity Attendees' (with a dropdown for Activity Attendees), 'Schedule' (with fields for When, from, to, Reminder, Email, and SMS), and 'Submit Options' (with a checkbox for 'Show customer after save'). The form is divided into sections by color: blue for Customer, Salesmen, Contact, Address, and Next Activity; green for Case; and light blue for Related Customers, Activity Attendees, Schedule, and Submit Options. Numbered callouts 1 through 7 point to specific elements: 1 points to the 'Create Cold Call' title; 2 points to the 'Customer' section; 3 points to the 'Case' section; 4 points to the 'Next Activity' section; 5 points to the 'Submit' button; 6 points to the 'Back' button; and 7 points to the 'CRM logo'.

NEW ACTIVITY

This gives you the ability to add a new Case/Activity for the current customer.

1. In the **Customer** Home page,
2. Click on the **New Activity** action button.



The screenshot shows the CO3 CRM interface for 'Example Company'. The top navigation bar includes the 'Hope Works' customer name and a search bar. The left sidebar contains various action buttons. The main content area displays the customer's details, including trading name, registered name, VAT number, registration number, rank, website, and phone number. A '12 Months Sales History' bar chart is also shown. A 'New Activity' button is highlighted with a red box and a red arrow pointing to it from the '91%' status indicator.

1. The **Save Activity** page will open.
2. You will note that the **Customer Name** has auto populated in the **Case** frame.
3. Fill in the remaining **Case**, **Activity** and **Quote** details, as required.
Refer to **Add/Edit an Activity** for more information/directions.

When you have finished making the required changes,

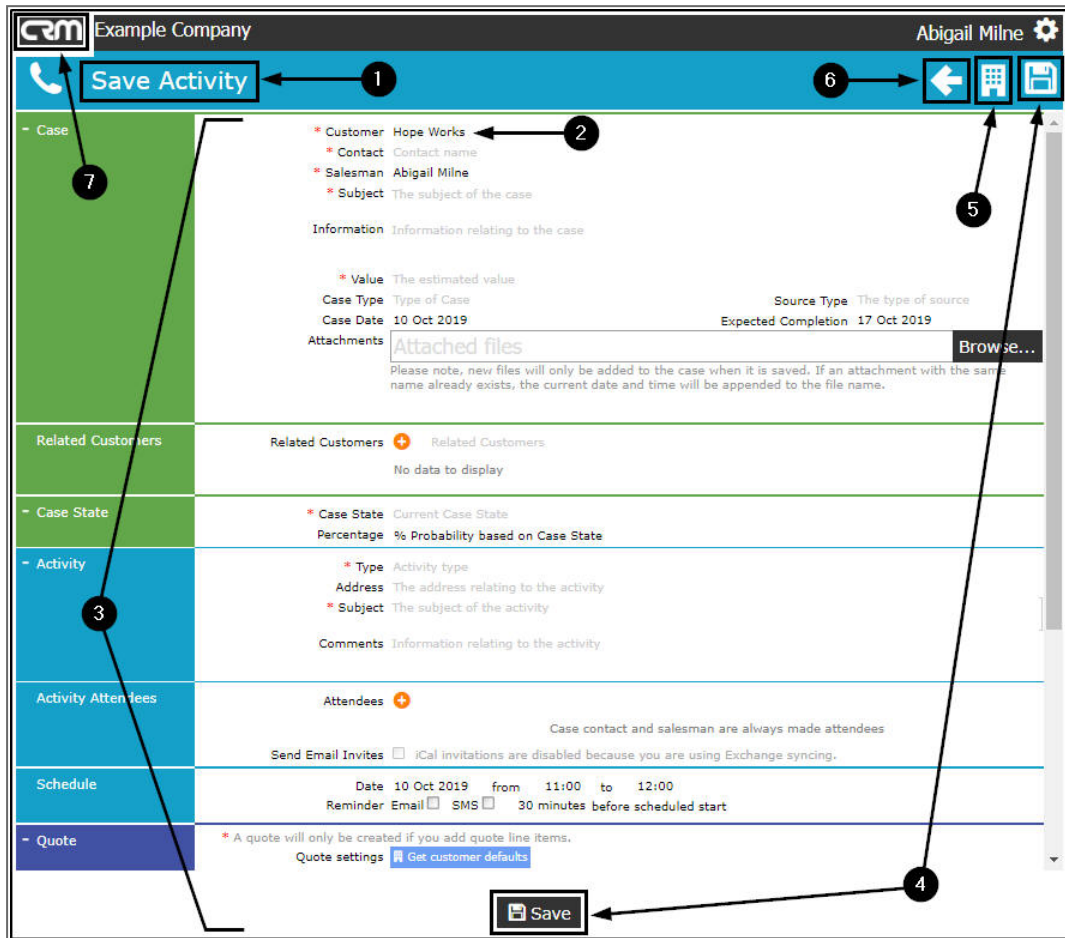
Either,

4. Click on **Save**, the new activity will be saved and you will return to the Customer home page.

Or, if you do not wish to save your changes:

5. Click on the **Customer icon** to return to the Customer home page,
or,

6. Click on **Back** to return to the previous page,
or,
7. Click on the **CRM logo** to return to the Dashboard (Home page).

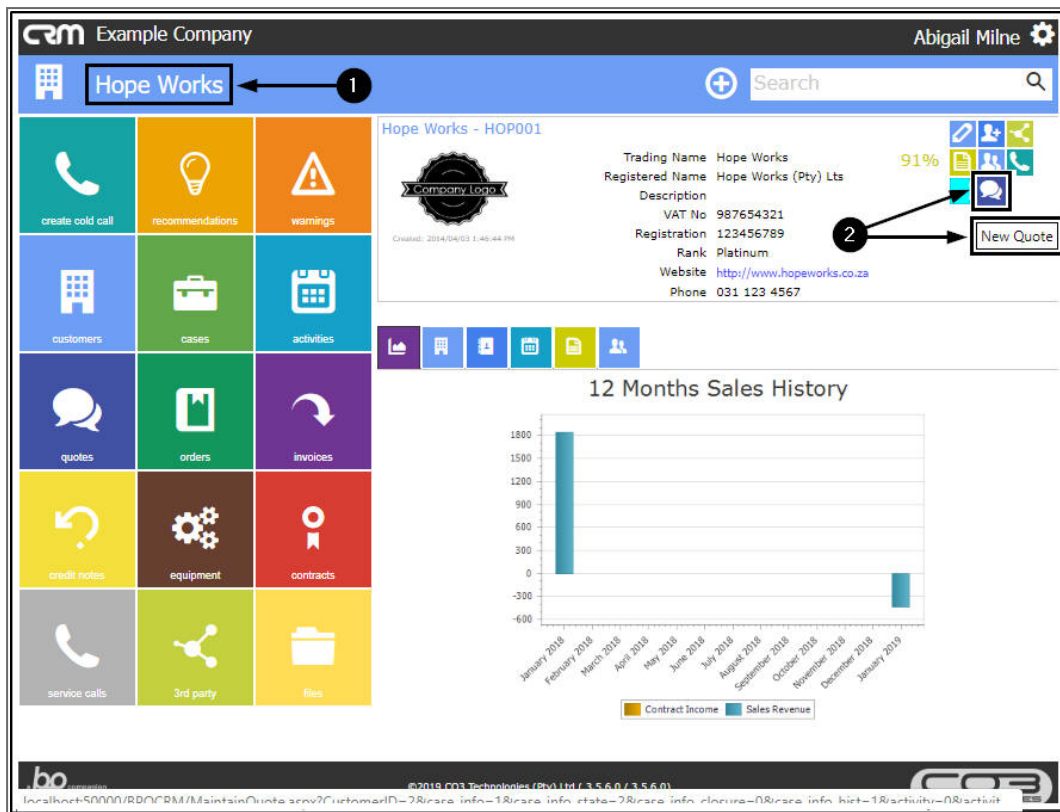


The screenshot shows the 'Save Activity' form in the CRM system. The form is titled 'Save Activity' and is part of the 'Example Company' interface. The user 'Abigail Milne' is logged in. The form contains several sections: 'Case', 'Related Customers', 'Case State', 'Activity', 'Activity Attendees', 'Schedule', and 'Quote'. The 'Case' section includes fields for Customer, Contact, Salesman, Subject, Information, Value, Case Type, Case Date, Source Type, and Expected Completion. The 'Activity' section includes fields for Type, Address, Subject, and Comments. The 'Quote' section includes a 'Save' button. Numbered callouts indicate the following actions:

- 1: Click on the 'Save Activity' button.
- 2: Click on the 'Customer' field.
- 3: Click on the 'Activity' section.
- 4: Click on the 'Save' button.
- 5: Click on the 'Browse...' button.
- 6: Click on the 'Back' button.
- 7: Click on the 'CRM logo'.

NEW QUOTE

1. In the **Customer** Home page,
2. Click on the **New Quote** action button.



1. The **Save Quote** page will open.
2. You will note that some of the details in this page have auto populated.
3. Fill in the remaining **Case, Quote, Quote Financials** and **Quote Items** details, as required. Refer to **Add a New Quote** for more information/directions.

When you have finished making the required changes,

Either,

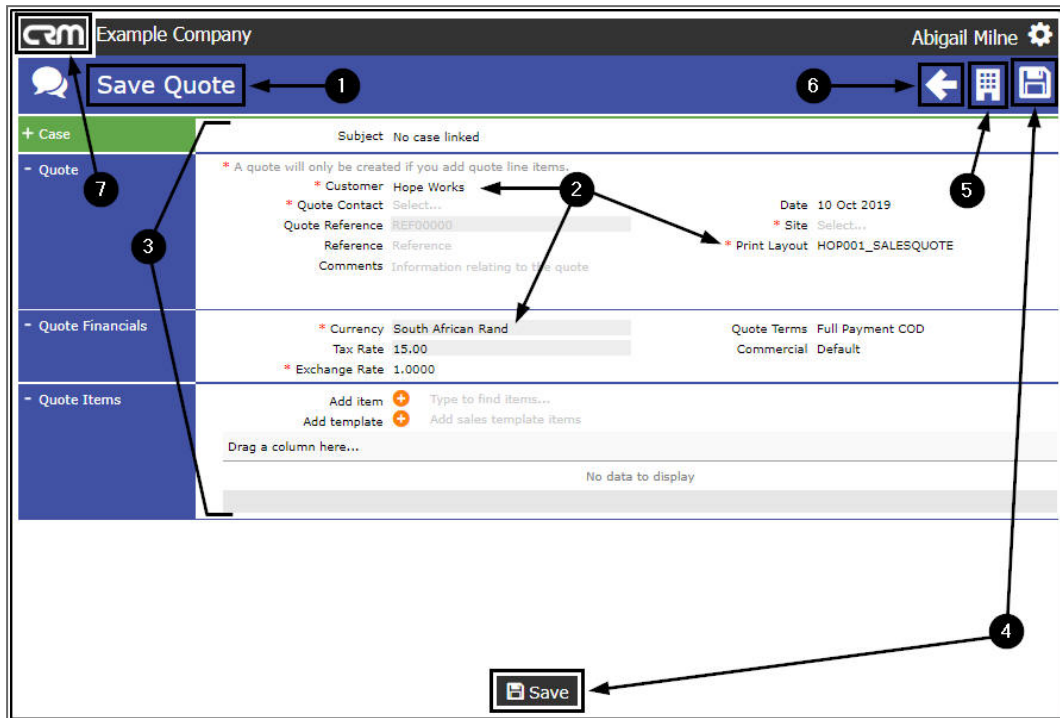
4. Click on **Save**, the new activity will be saved and you will return to the Customer home page.

Or, if you do not wish to save your changes:

5. Click on the **Customer icon** to return to the Customer home page,
or,
6. Click on **Back** to return to the previous page,

or,

- Click on the **CRM logo** to return to the Dashboard (Home page).



RELEASE CUSTOMER

Note: This **Release** action button is only available for a customer that is in status: **New - CRM**. Once the customer has moved from **New - CRM** to **Released**, your accounts department can check/update all financial details and then either **Approve or Decline** the Customer (this will move the customer to the **Active** status if **Approved** or back to the **New** status if **Declined**).

- In the (New - CRM) **Customer** Home page,
- Click on the **Release Customer** action button.



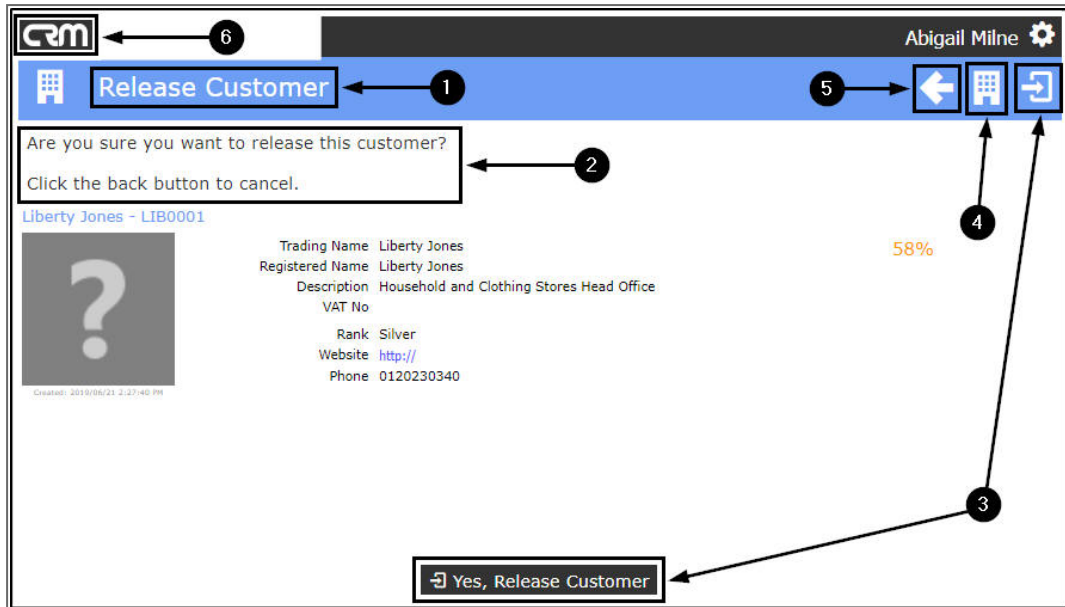
1. The Release Customer page will open.
2. A message will display on this page:
 - ***Are you sure you want to release this customer? Click the Back button to cancel.***

Either,
3. Click on the ***Yes, Release Customer*** button or the ***Save*** button to release this customer.

Or, if you do not wish to release this customer:
4. Click on the ***Customer icon*** to return to the Customer home page,

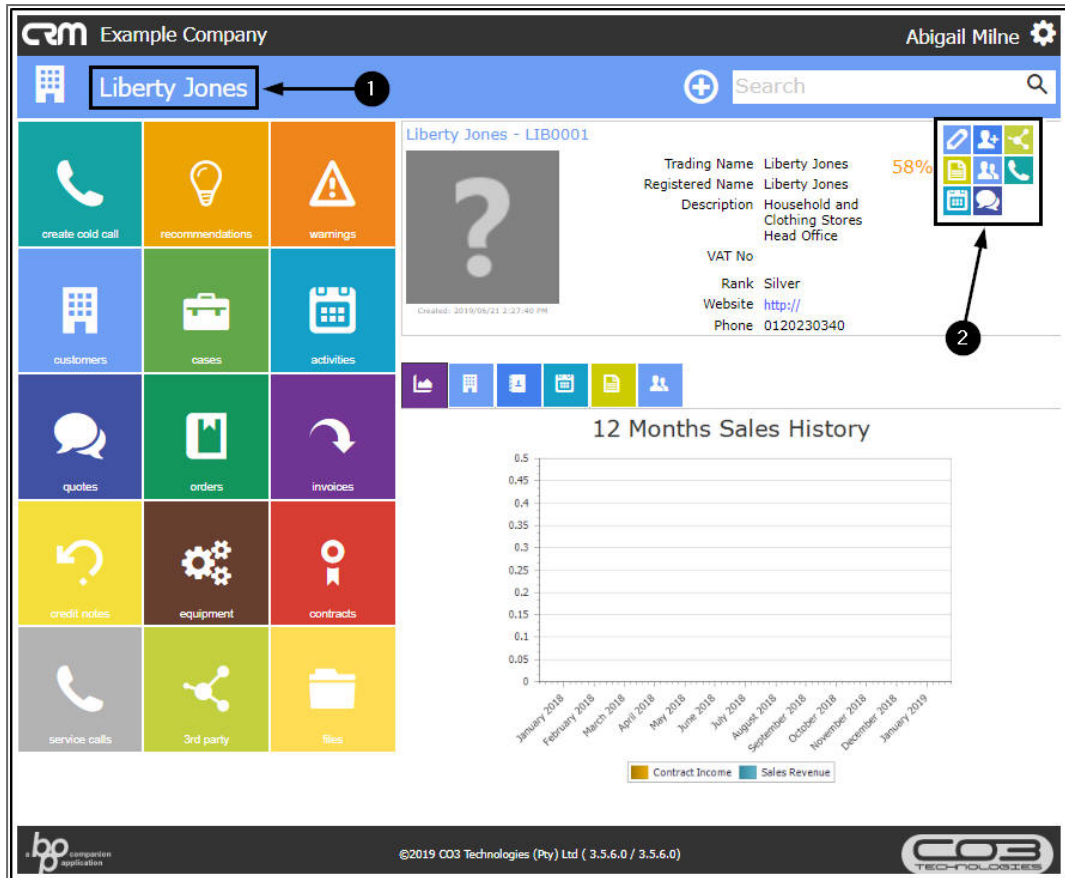
or,
5. Click on ***Back*** to return to the previous page,

or,
6. Click on the ***CRM logo*** to return to the Dashboard (Home page).



1. If you released the customer, you will return to the Customer Home page.
2. Note that the Release Customer button is no longer available.

This customer will now need to be **Approved** in BPO in order to become Active.



CRM Example Company Abigail Milne

Liberty Jones

Liberty Jones - LIB0001

Trading Name Liberty Jones
Registered Name Liberty Jones
Description Household and Clothing Stores Head Office

VAT No
Rank Silver
Website <http://>
Phone 0120230340

58%

12 Months Sales History

Contract Income Sales Revenue

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CRM.002.014