

CRM CUSTOMERS

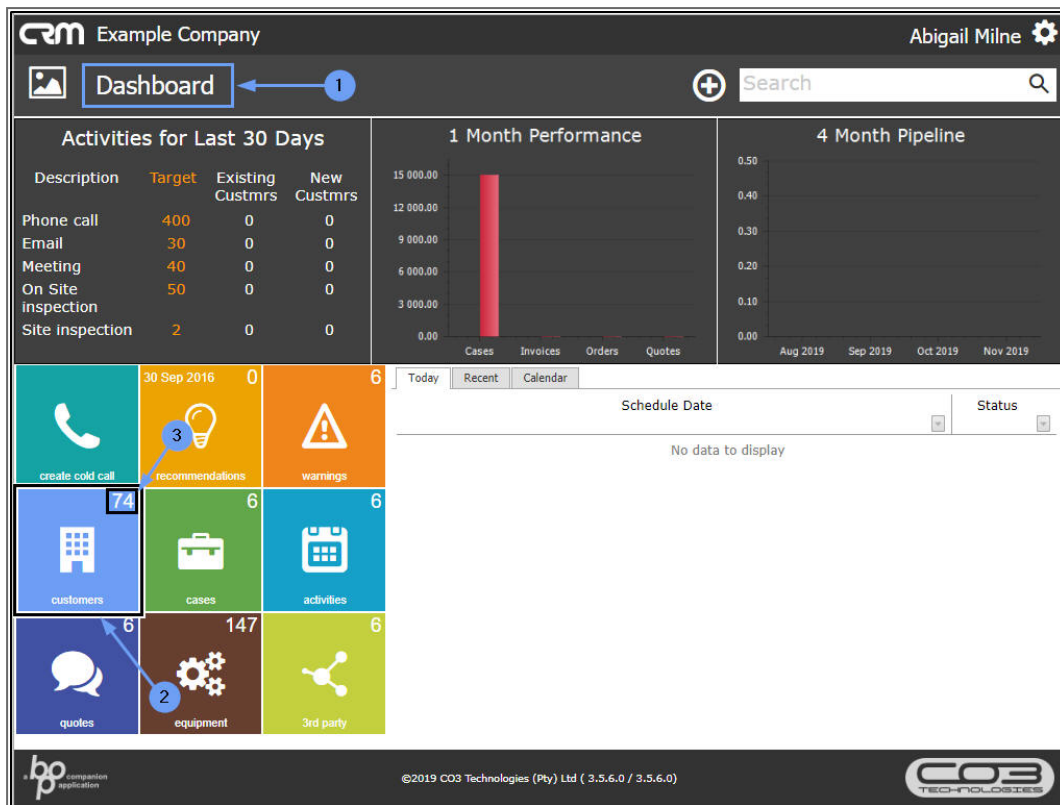
CUSTOMER DETAILS TILES

- In the Customer Dashboard (Customer Home page) you can click on customer **Information tiles** which will direct you pages containing information regarding:
 - Customer **Sales History**
 - Customer **Addresses**
 - Customer **Contacts**
 - Customer **Open Activities**
 - Customer **Notes**
 - Customer **Salesmen**

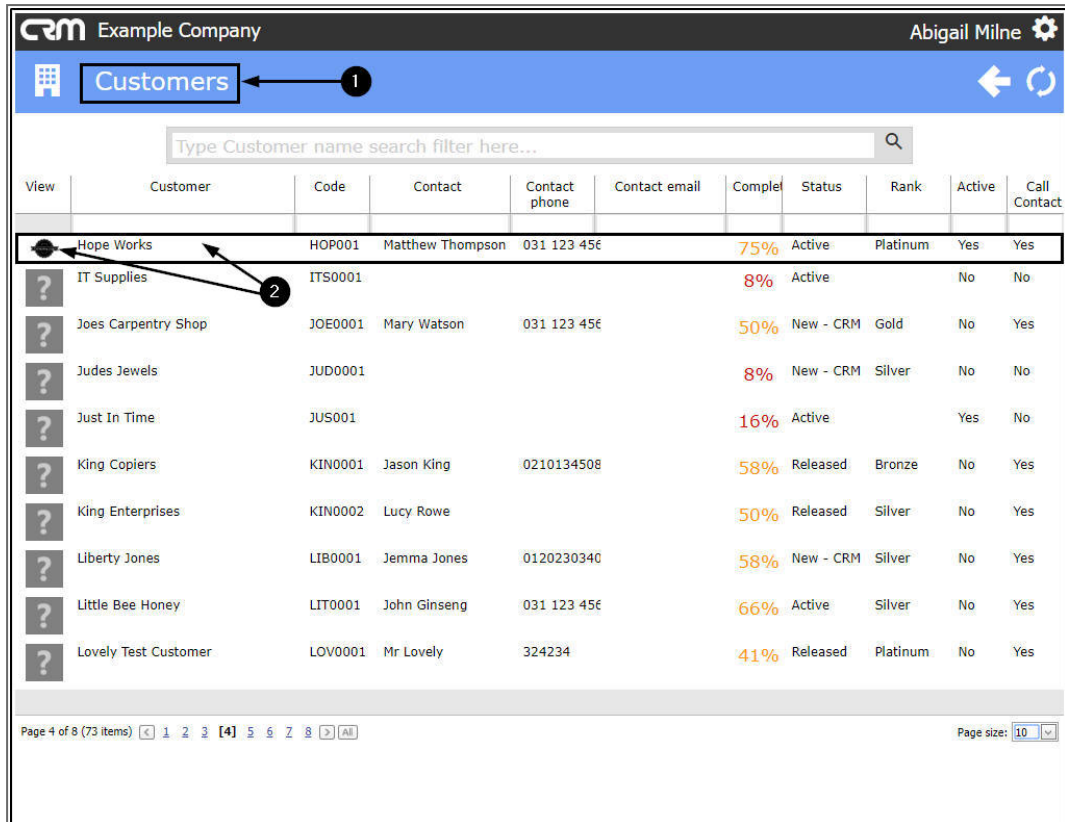
Ribbon Access: Webpage > [http://\[servername\]:\[port-no\]/BPOCRM/User.aspx](http://[servername]:[port-no]/BPOCRM/User.aspx)

NAVIGATE TO THE CUSTOMER DASHBOARD

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.



- The **Customers** listing page will open.
 - Here you can view all the customers where you are either the **main** salesperson or **linked** as a salesperson.
- Select the specific customer that you wish to view by clicking on the **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 bar is present. The table below lists customer details. Annotations 1 and 2 point to the 'Customers' tab and the 'IT Supplies' row respectively.

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

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

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

SELECT THE 'HIDE DASHBOARD PANEL ON CUSTOMER PAGE' SETTING

2. Click on the **Settings** icon.



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



The screenshot shows the CRM interface for 'Example Company' with the user 'Abigail Milne'. The main dashboard for 'Hope Works' includes a table of activities for the last 30 days, a grid of functional tiles, and a detailed view of the customer 'Hope Works - HOP001'.

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

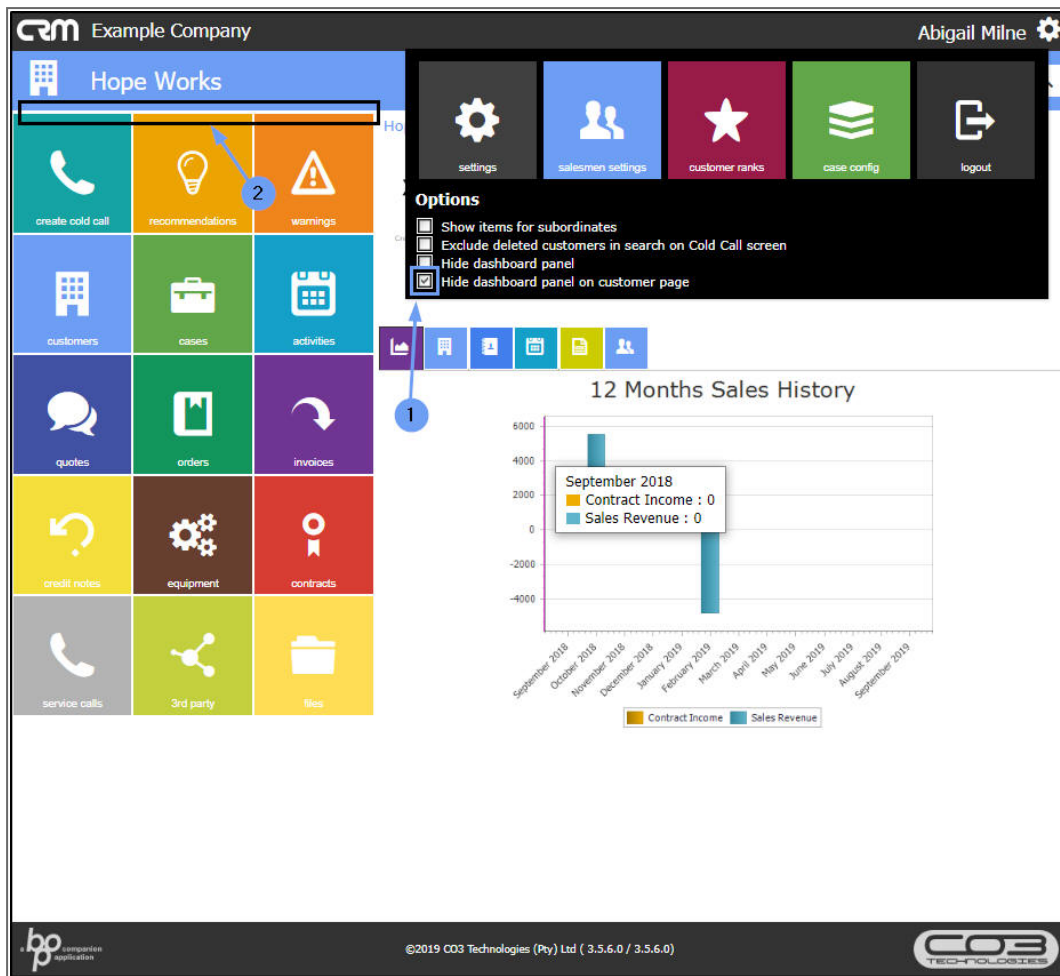
Trading Name: Hope Works
Registered Name: Hope Works (Pty) Lts
Description: VAT No 987654321
Registration: 123456789
Rank: Platinum
Website: <http://www.hopeworks.co.za>
Phone: 031 123 4567

12 Months Sales History

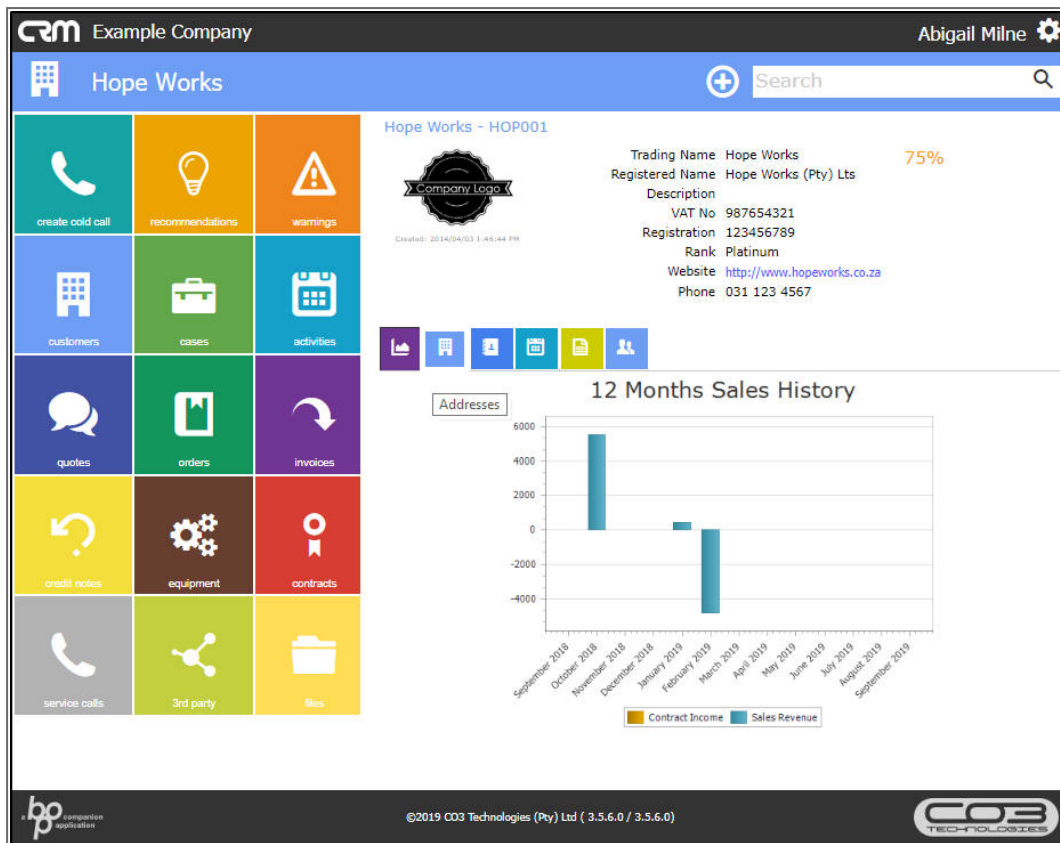
The chart shows sales data from September 2018 to September 2019. The Y-axis ranges from -4000 to 6000. The X-axis lists the months. The legend indicates 'Contract Income' (yellow) and 'Sales Revenue' (blue).

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

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

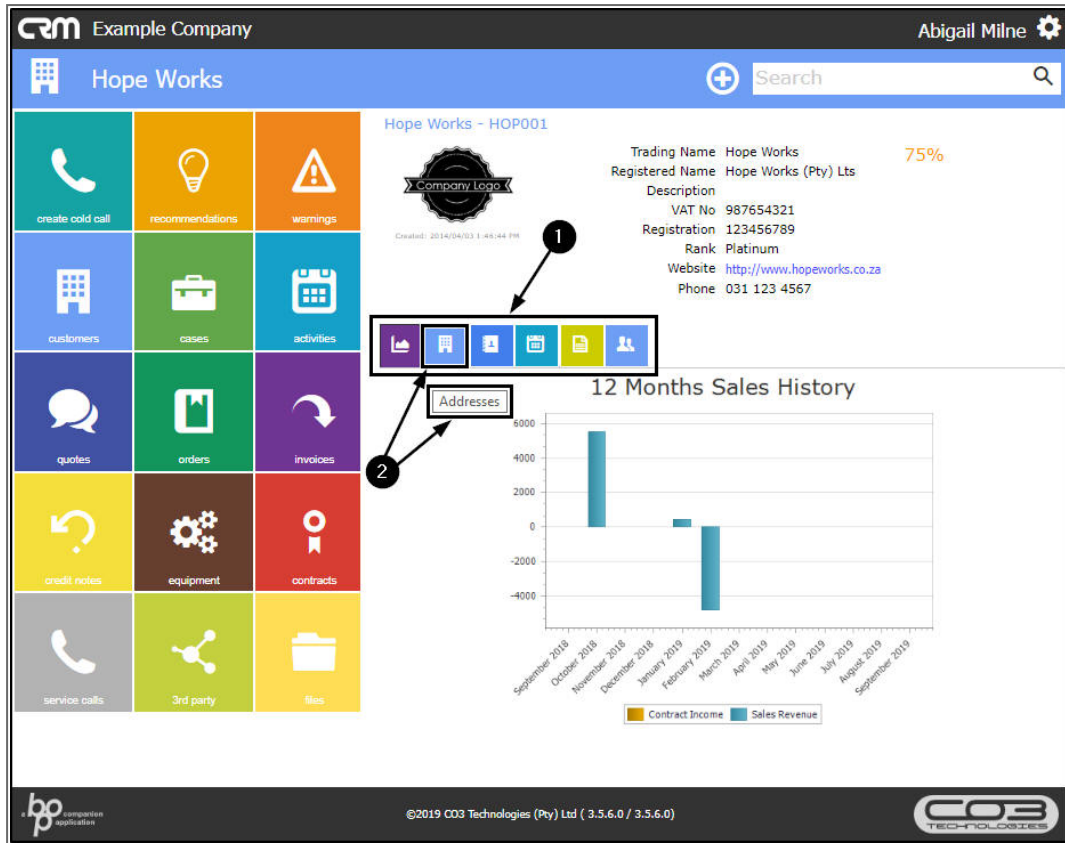


- Click outside of the Settings frame to view the full page without the Dashboard.



VIEW CUSTOMER DETAILS TILES

- Here you can view the Customer *Details Tiles*.
- Hover over** any of the tiles to display that specific tile description:
 - Sales
 - Addresses
 - Contacts
 - Open Activities
 - Notes
 - Salesmen



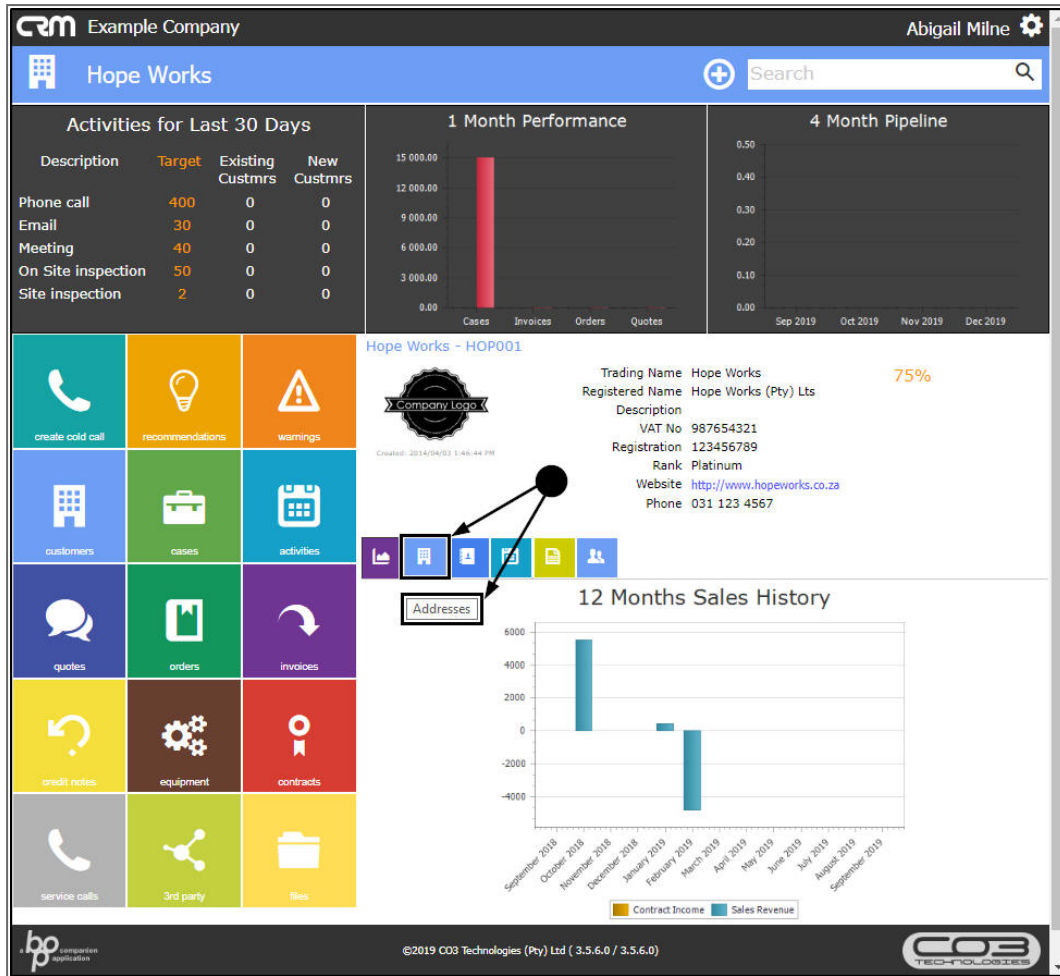
SALES

1. Hover over the **Sales** tile to bring up the description text box.
2. The **12 Months Sales History** will be displayed by default, in the **Details** frame, as the Customer Dashboard opens.

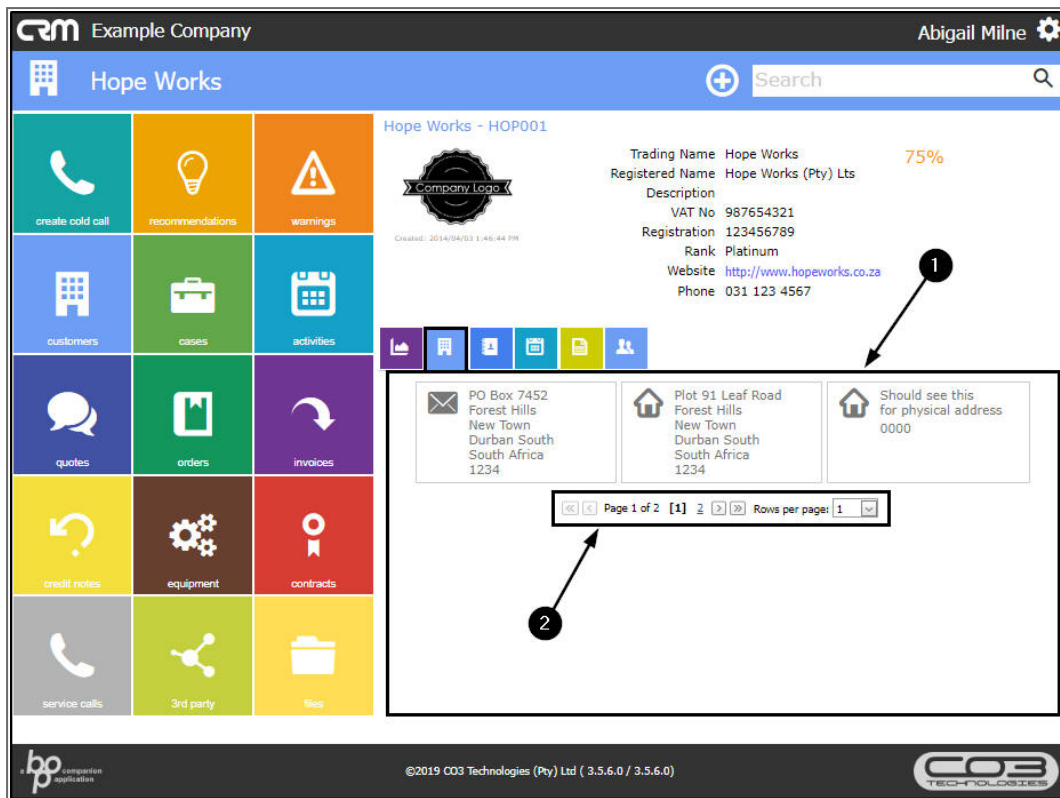


ADDRESSES

- Click on the **Addresses** tile.



- The customer **addresses** will be displayed in the details frame.
- You can use the **Page Reference field** to scroll between the address pages.
 - The customer addresses can only be viewed here - if you wish to make changes to the addresses, refer to **customer addresses**.



CRM Example Company Abigail Milne

Hope Works

Hope Works - HOP001

Trading Name Hope Works 75%

Registered Name Hope Works (Pty) Lts

Description

VAT No 987654321

Registration 123456789

Rank Platinum

Website <http://www.hopeworks.co.za>

Phone 031 123 4567

Created: 2014/04/02 1:46:44 PM

PO Box 7452, Forest Hills, New Town, Durban South, South Africa 1234

Plot 91 Leaf Road, Forest Hills, New Town, Durban South, South Africa 1234

Should see this for physical address 0000

Page 1 of 2 [1] Rows per page: 1

CONTACTS

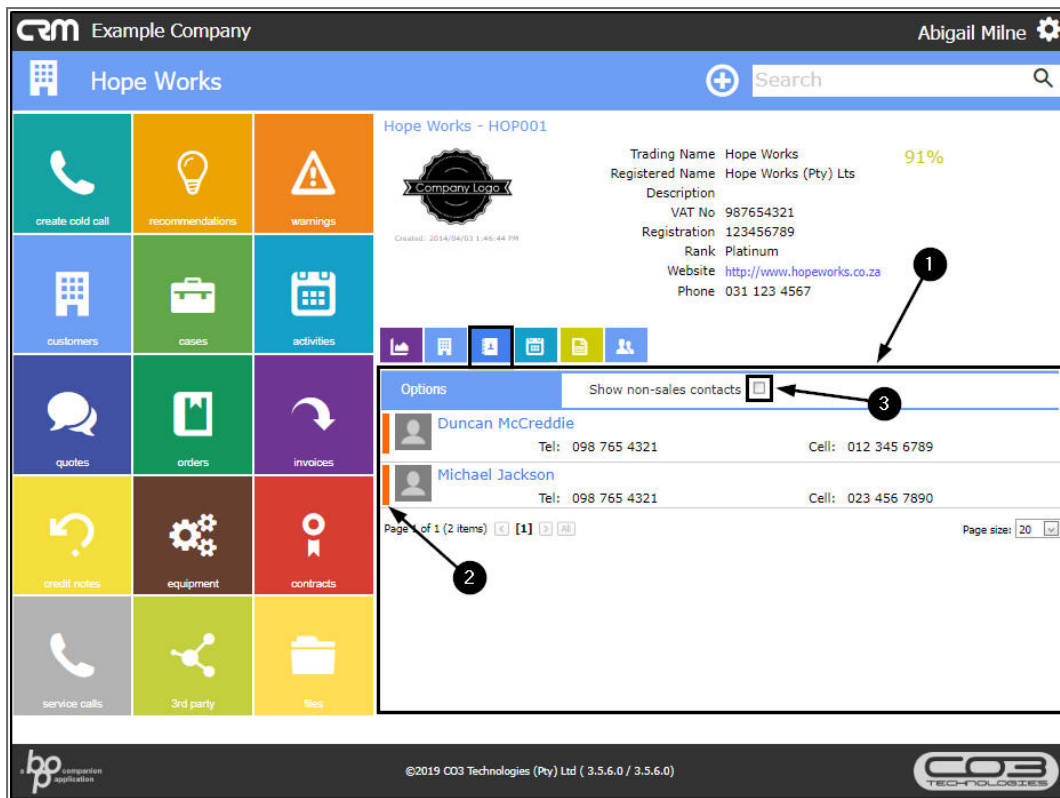
- Client on the **Contacts** tile.



1. The customer **contacts** will be displayed in the details frame.
2. By default, the details frame will only display the **sales** contacts - these are marked with an orange bar.

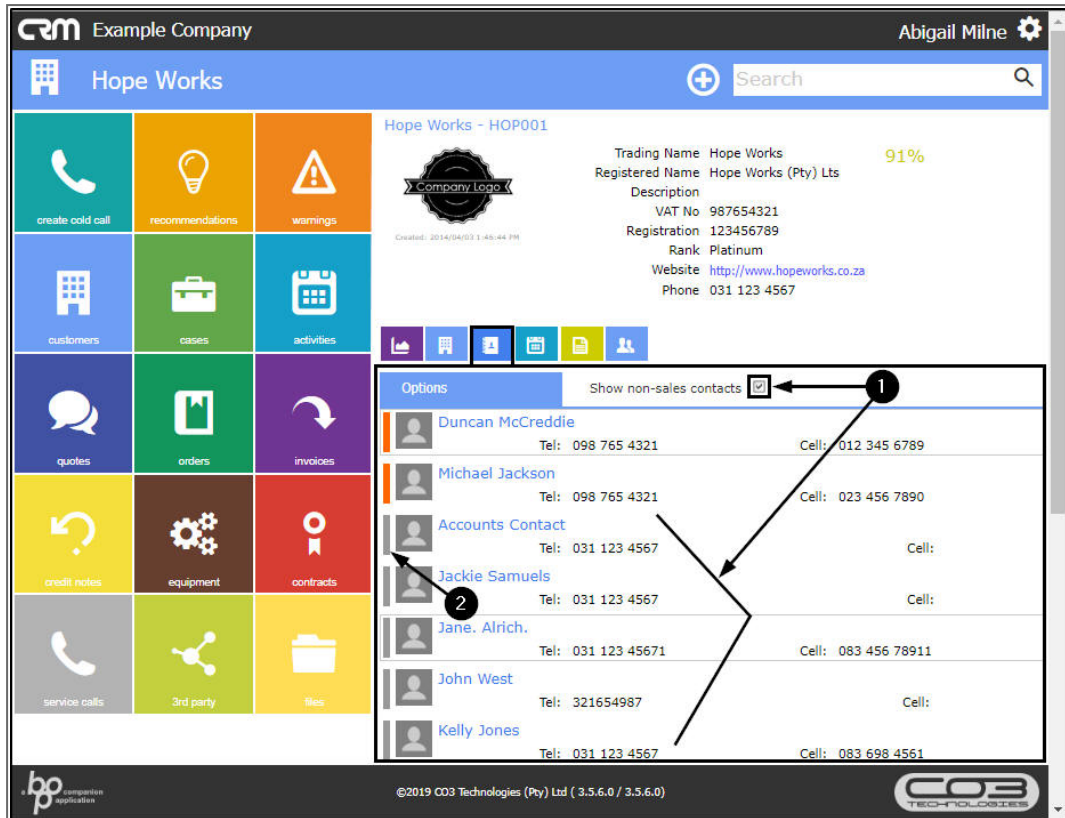
SHOW SALES / NON-SALES CONTACTS

3. If you would like to see all the customer contacts, select the **Show non-sales contacts** checkbox.



The screenshot displays the CRM interface for 'Example Company' with the user 'Abigail Milne'. The main section is titled 'Hope Works' and shows a grid of tiles for various functions: create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files. The right-hand pane displays the details for 'Hope Works - HOP001', including a company logo, trading name, registered name, description, VAT number, registration number, rank, website, and phone number. A 'Show non-sales contacts' checkbox is visible, which is annotated with a '3'. Below this, a list of contacts is shown, including 'Duncan McCreddie' and 'Michael Jackson', each with their telephone and cell numbers. A 'Page 1 of 1 (2 items)' indicator is present, annotated with a '2'. A '1' points to the 'Show non-sales contacts' checkbox.

1. **Non-sales** contacts will now also display.
2. These are marked with a grey bar.



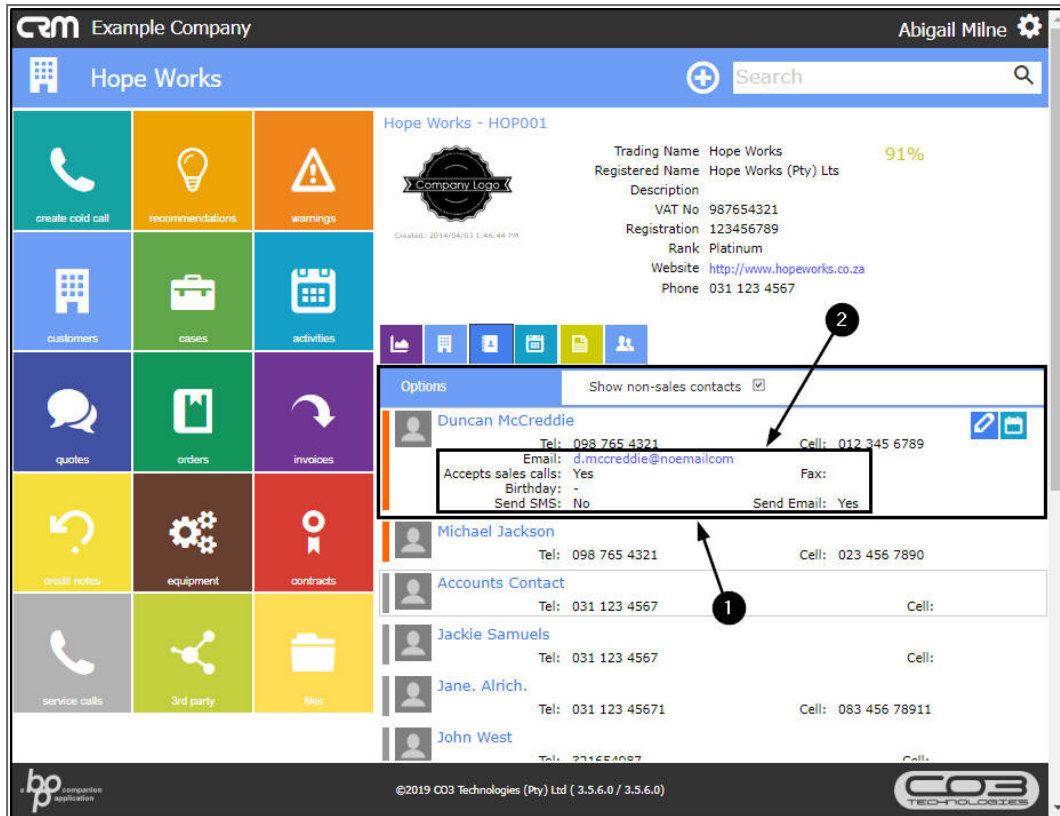
The screenshot shows a CRM interface for 'Example Company' with a user 'Abigail Milne'. The main section displays 'Hope Works - HOP001' with a 91% status. A sidebar on the left contains various function tiles like 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The main content area shows a list of contacts with the following details:

Contact Name	Tel:	Cell:
Duncan McCreddie	098 765 4321	012 345 6789
Michael Jackson	098 765 4321	023 456 7890
Accounts Contact	031 123 4567	
Jackie Samuels	031 123 4567	
Jane. Alrich.	031 123 45671	083 456 78911
John West	321654987	
Kelly Jones	031 123 4567	083 698 4561

Annotations in the image show a red arrow labeled '1' pointing to the 'Show non-sales contacts' checkbox, and a black arrow labeled '2' pointing to the 'Accounts Contact' row.

EXPAND CONTACT DETAILS

1. **Click once** on any specific contact frame to **expand** it.
2. You will now be able to view extra details for example: the contact **email address** and whether this contact **accepts sales calls**.



CRM Example Company Abigail Milne

Hope Works + Search

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

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

Options Show non-sales contacts ☒

Duncan McCreddie
Tel: 098 765 4321 Cell: 012 345 6789
Email: d.mccreddie@noemail.com
Accepts sales calls: Yes Fax:
Birthday: Birthdate: Birthdate:
Send SMS: No Send Email: Yes

Michael Jackson
Tel: 098 765 4321 Cell: 023 456 7890

Accounts Contact
Tel: 031 123 4567 Cell:

Jackie Samuels
Tel: 031 123 4567 Cell:

Jane, Alrich.
Tel: 031 123 45671 Cell: 083 456 78911

John West
Tel: 031 123 4567 Cell:

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VIEW/EDIT THIS SALES CONTACT

1. If you expanded a Sales contact - you will also now be able to view 2 **Action** buttons in this frame.

Note: If you **hover over** any Sales contact (without expanding the contact frame - you will also be able to view these **Action** buttons.

2. Click on the **View/Edit this Contact** button.



CRM Example Company Abigail Milne

Hope Works

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

Options Show non-sales contacts ☒

Duncan McCreddie

Tel: 098 765 4321 Cell: 012 345 6789

Email: d.mccreddie@noemail.com

Accepts sales calls: Yes

Birthday:

Send SMS: No

Send Email: Yes

Michael Jackson

Tel: 098 765 4321 Cell: 023 456 7890

Accounts Contact

Tel: 031 123 4567 Cell:

Jackie Samuels

Tel: 031 123 4567 Cell:

Jane Alrich

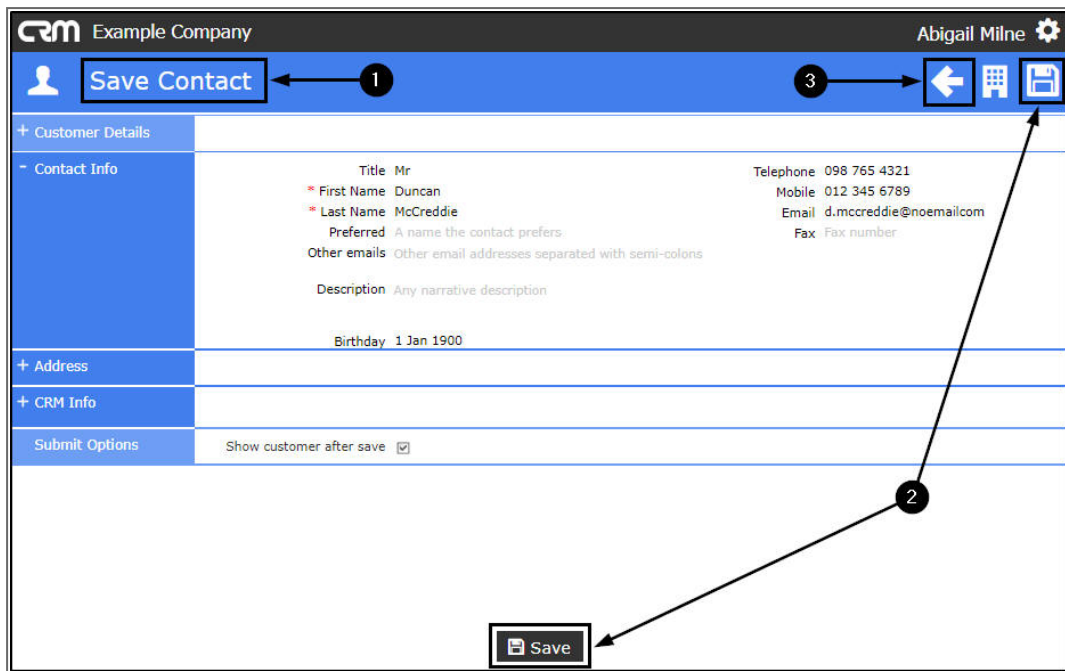
Tel: 031 123 45671 Cell: 083 456 78911

John West

Tel: 031 123 4567 Cell:

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1. The **Save Contact** page will open.
2. Either, update the contact information as required (refer to **Add/Edit Contact** for more details) and click on **Save**.
3. Or, return to the **Customer page** if you do not wish to make or save any changes.



The screenshot shows a CRM interface for 'Example Company' with a user 'Abigail Milne'. The 'Save Contact' form is displayed with the following fields and annotations:

- Annotation 1:** Points to the 'Save Contact' button in the top left of the form.
- Annotation 2:** Points to the 'Save' button at the bottom center of the form.
- Annotation 3:** Points to the 'Save' icon in the top right of the form.

The form fields include:

- Customer Details:**
 - Contact Info:**
 - Title: Mr
 - * First Name: Duncan
 - * Last Name: McCreddie
 - Preferred: A name the contact prefers
 - Other emails: Other email addresses separated with semi-colons
 - Description: Any narrative description
 - Birthday: 1 Jan 1900
 - Address:**
 - CRM Info:**
 - Submit Options:**
 - Show customer after save: ☒
- Right-hand side fields:**
 - Telephone: 098 765 4321
 - Mobile: 012 345 6789
 - Email: d.mccreddie@noemail.com
 - Fax: Fax number

CREATE A NEW CASE AND ACTIVITY

- In the *Customer* page,
- Click on the *Create a new case and activity for this contact* button.



CRM Example Company Abigail Milne

Hope Works ← 1

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

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

Options Show non-sales contacts ☒

Duncan McCreddie
Tel: 098 765 4321 Cell: 012 345 6789
Email: d.mccreddie@noemail.com
Accepts sales calls: Yes Fax:
Birthday: Send SMS: No Send Email: Yes

Michael Jackson
Tel: 098 765 4321 Cell: 023 456 7890

Accounts Contact
Tel: 031 123 4567 Cell:

Jackie Samuels
Tel: 031 123 4567 Cell:

Jane, Alrich.
Tel: 031 123 45671 Cell: 083 456 78911

John West
Tel: 031 123 4567 Cell:

2

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- The **Save Activity** page will open.
- Either, update the Case and Activity details as required (refer to **Add a New Activity** for more details) and click on **Save**.
- Or, return to the **Customer page** if you do not wish to make or save any changes.

CRM

Example Company

Abigail Milne

⚙️

📞

Save Activity

1

3

⏪

🏠

💾

Case

* Customer

Hope Works

* Contact

Duncan McCreddie

* Salesman

Abigail Milne

* Subject

The subject of the case.

Information

Information relating to the case.

* Value

The estimated value.

Case Type

Type of Case

Case Date

9 Sep 2019

Source Type

The type of source

Expected Completion

16 Sep 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.

Browse...

No data to display

Related Customers

Related Customers

No data to display

Case State

* Case State

Current Case State

Percentage

% Probability based on Case State

Activity

* Type

Activity type.

Address

The address relating to the activity

* Subject

The subject of the activity

Comments

Information relating to the activity

Activity Attendees

Attendees

Case contact and salesman are always made attendees

Send Email Invites

☐

*note that invitations can only be sent to attendees with valid email addresses

Schedule

Date

9 Sep 2019

from

15:00

to

16:00

Reminder Email

☐

SMS

☐

30 minutes before scheduled start

+ Quote

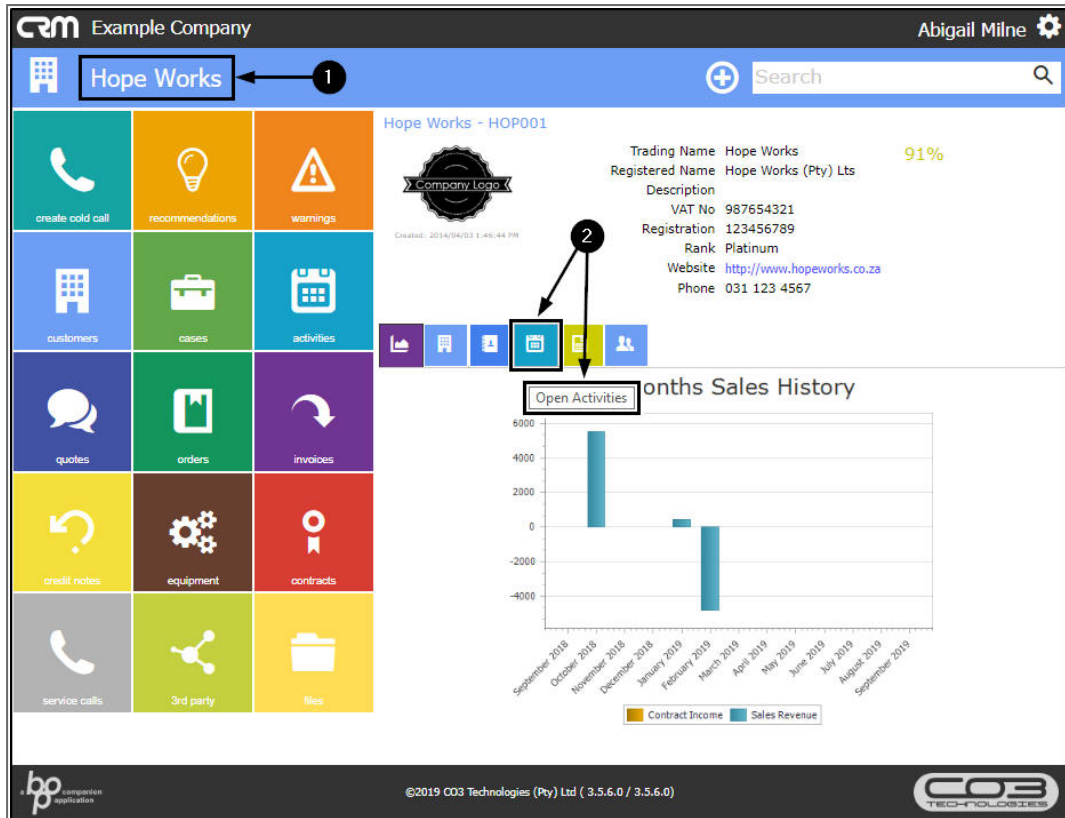
Save

2

CUSTOMER DETAILS

OPEN ACTIVITIES

1. In the *Customer page*,
2. Click on the *Open Activities* tile.



1. A list of all **open activities** for the selected customer will be displayed in the Details frame.

View the Action buttons

2. **Hover over** a selected activity.



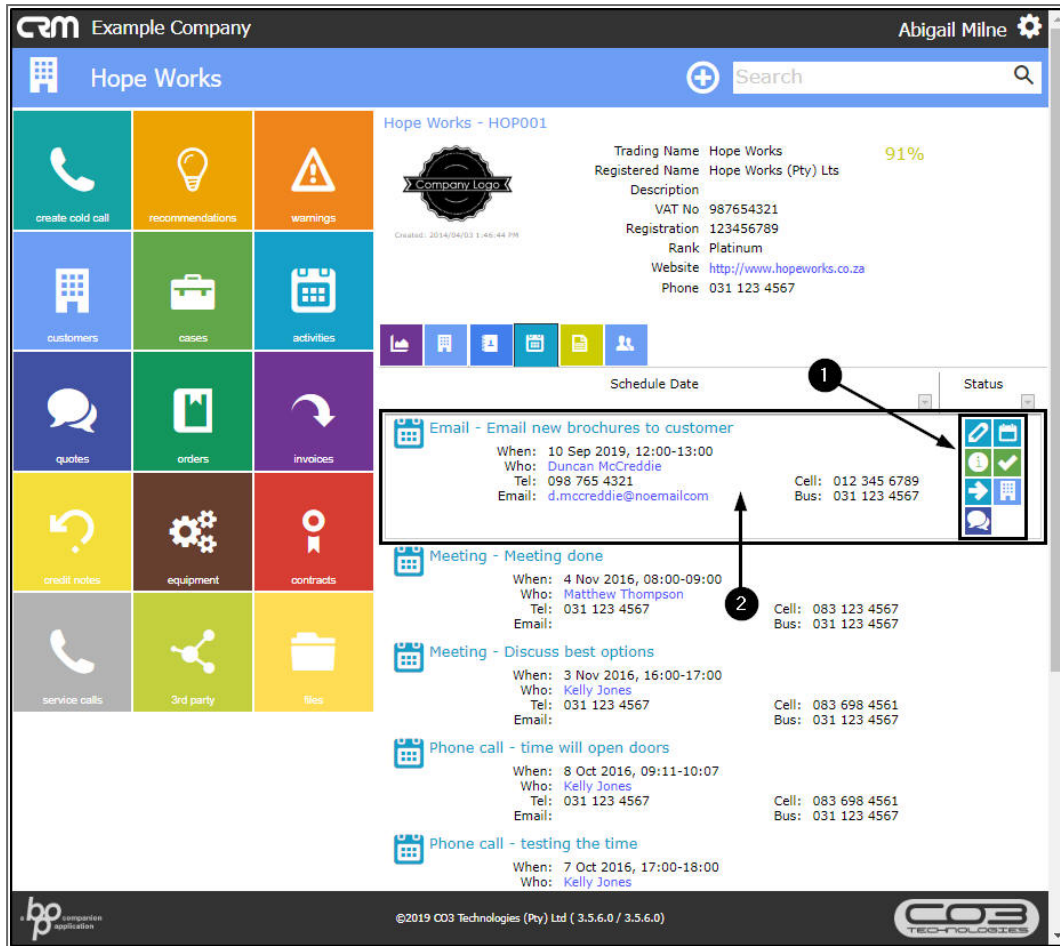
The screenshot displays the CRM interface for 'Example Company'. The top navigation bar includes the company name, a user profile for 'Abigail Milne', and a search bar. The main content area is divided into a left sidebar with various action tiles (e.g., 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', 'files') and a central panel for 'Hope Works - HOP001'. The central panel shows the company's trading name, registered name, description, VAT number, registration number, rank, website, and phone number. Below this, a list of activities is displayed, including 'Email - Email new brochures to customer', 'Meeting - Meeting done', 'Meeting - Discuss best options', 'Phone call - time will open doors', and 'Phone call - testing the time'. Each activity entry includes a date, time, and contact information. A red circle with the number '1' highlights the 'Action buttons' (create cold call, recommendations, warnings) in the sidebar. A red circle with the number '2' highlights the 'Action buttons' (Email, Meeting, Phone call) in the central panel.

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

CONTACTS

EXPAND CONTACT DETAILS

2. **Single click** anywhere on a selected activity (but not directly on any of the Action buttons).



CRM Example Company Abigail Milne

Hope Works + Search

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

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

Activities:

- create cold call
- recommendations
- warnings
- customers
- cases
- activities
- quotes
- orders
- invoices
- credit notes
- equipment
- contracts
- service calls
- 3rd party
- files

Activity List:

- Email - Email new brochures to customer** (Selected)
When: 10 Sep 2019, 12:00-13:00
Who: [Duncan McCreddie](#)
Tel: 098 765 4321
Email: d.mccreddie@noemail.com
Cell: 012 345 6789
Bus: 031 123 4567
- Meeting - Meeting done**
When: 4 Nov 2016, 08:00-09:00
Who: [Matthew Thompson](#)
Tel: 031 123 4567
Email:
Cell: 083 123 4567
Bus: 031 123 4567
- Meeting - Discuss best options**
When: 3 Nov 2016, 16:00-17:00
Who: [Kelly Jones](#)
Tel: 031 123 4567
Email:
Cell: 083 698 4561
Bus: 031 123 4567
- Phone call - time will open doors**
When: 8 Oct 2016, 09:11-10:07
Who: [Kelly Jones](#)
Tel: 031 123 4567
Email:
Cell: 083 698 4561
Bus: 031 123 4567
- Phone call - testing the time**
When: 7 Oct 2016, 17:00-18:00
Who: [Kelly Jones](#)

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- The selected activity frame will **expand** to display more details regarding the activity.

CRM Example Company

Abigail Milne

Hope Works

Search

create cold call

recommendations

warnings

customers

cases

activities

quotes

orders

invoices

credit notes

equipment


contracts

service calls

3rd party

files

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

Schedule Date

Status

Email - Email new brochures to customer

When: 10 Sep 2019, 12:00-13:00

Who: Duncan McCreddie

Tel: 098 765 4321

Email: d.mccreddie@nemail.com

Where: Plot 91 Leaf Road Forest Hills New Town Durban South South Africa

Case: Email new brochures

Comments:

Completion Notes:

Meeting - Meeting done

When: 4 Nov 2016, 08:00-09:00

Who: Matthew Thompson

Tel: 031 123 4567

Email:

Cell: 083 123 4567

Bus: 031 123 4567

Meeting - Discuss best options

When: 3 Nov 2016, 16:00-17:00

Who: Kelly Jones

Tel: 031 123 4567

Email:

Cell: 083 698 4561

Bus: 031 123 4567

Phone call - time will open doors

When: 8 Oct 2016, 09:11-10:07

Who: Kelly Jones

Tel: 031 123 4567

Email:

Cell: 083 698 4561

Bus: 031 123 4567

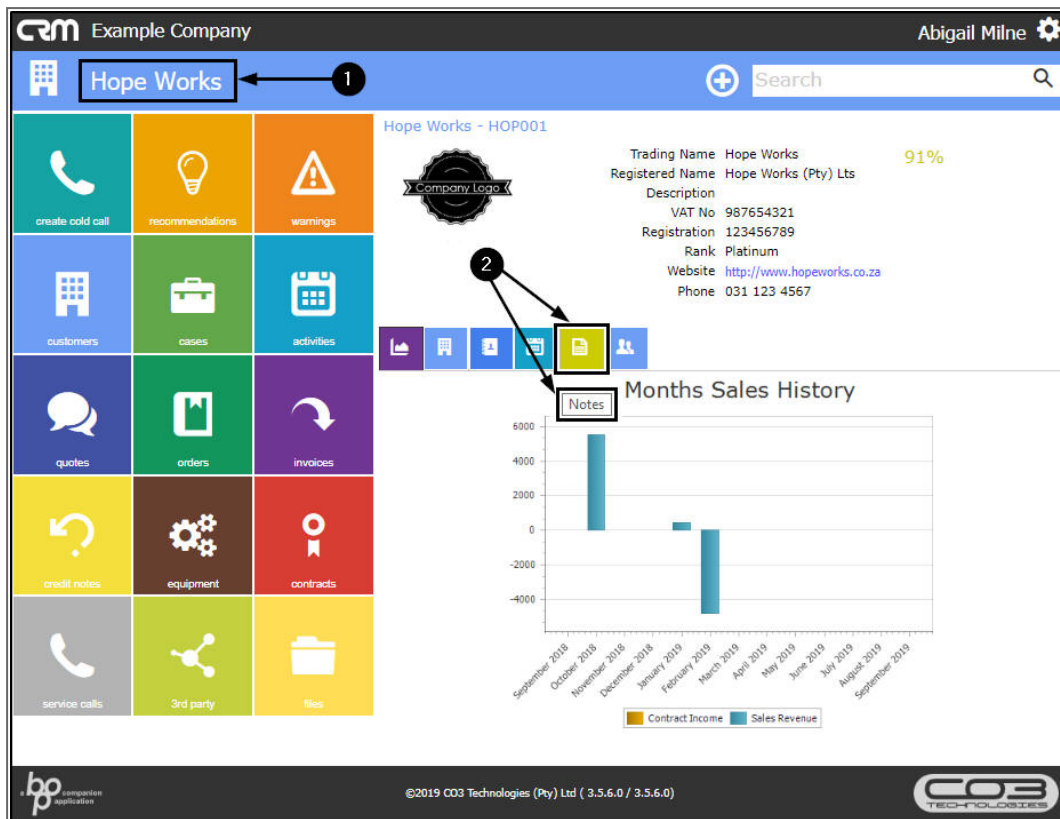
Phone call - testing the time

NOTES


1. In the **Customer page**,
2. Click on the **Notes** tile.

Help v2.5.1.4 - Pg 23 - Printed: 27/06/2024

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- A list of all the **Notes** linked to this customer will be displayed.
 - Notes can only be viewed here - if you wish to add a note, refer to **Add Note**.



CRM Example Company Abigail Milne

Hope Works Search

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 1:40:44 PM

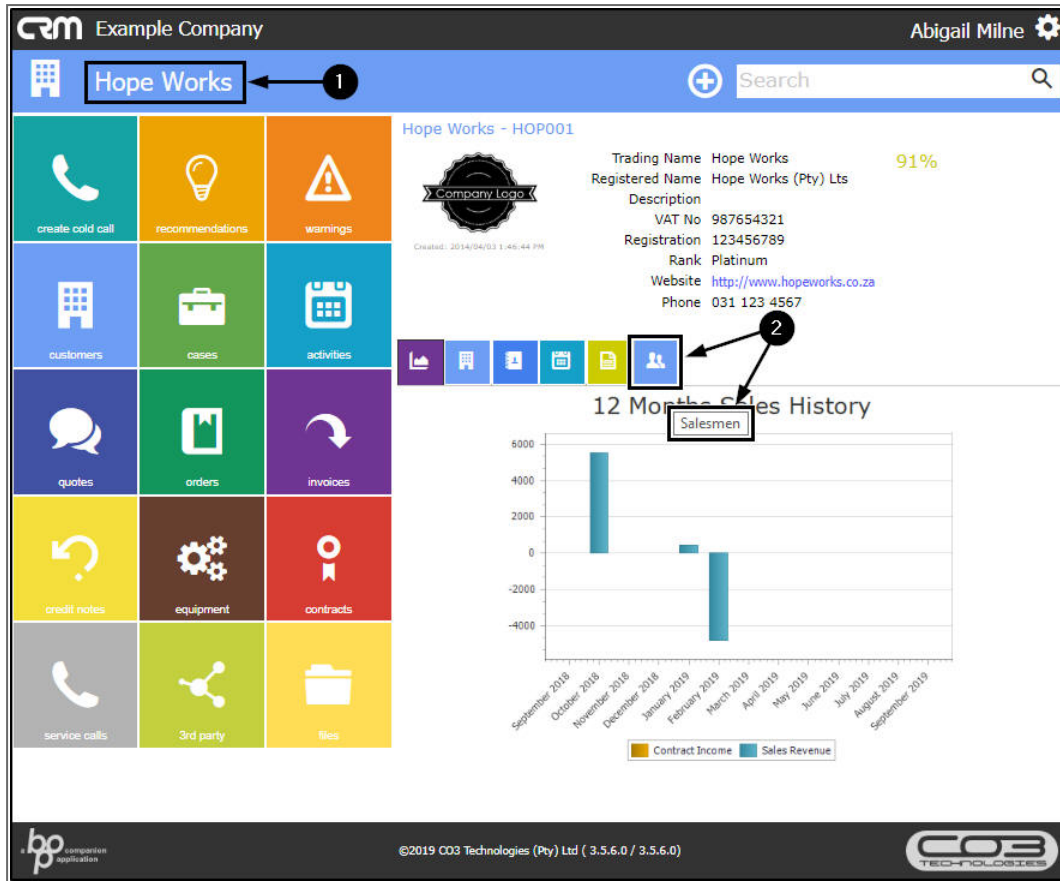
Abigail Milne - 30 Jul 2019 16:21:00
All quotes to be sent to both the CFO and the Buying Officer.
Judith Mudzengi - 09 Feb 2017 11:21:51
Call customer to confirm order
Bianca Du Toit - 18 Apr 2016 12:09:00
Existing third party contract pending renewal. Client would like to switch.
Belinda Sharman - 04 Aug 2014 00:00:00
Check toner yield

Page 1 of 1 (4 items) Page size: 10

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VIEW SALESMAN/ADDITIONAL SALESMEN

1. In the *Customer home page*,
2. Click on the *Salesmen* tile.



- A list of all the **Salesmen** linked to this customer will be displayed.
- Salesmen can only be viewed here - if you wish to make changes to the linked salesmen, refer to **Main-tain Customer Salesmen**.



CRM Example Company Abigail Milne

Hope Works Search

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

Abigail Milne - 30 Jul 2019 16:21:00
All quotes to be sent to both the CFO and the Buying Officer.

Judith Mudzengi - 09 Feb 2017 11:21:51
Call customer to confirm order

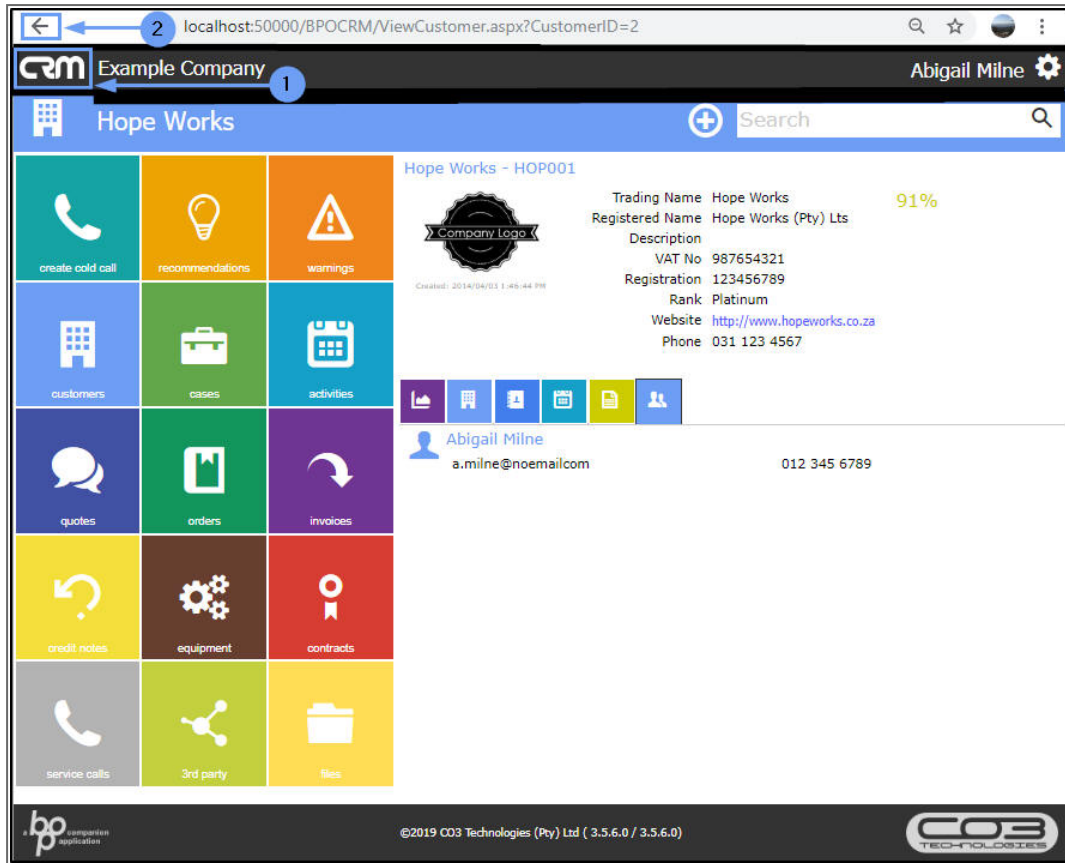
Bianca Du Toit - 18 Apr 2016 12:09:00
Existing third party contract pending renewal. Client would like to switch.

Belinda Sharman - 04 Aug 2014 00:00:00
Check toner yield

Page 1 of 1 (4 items) Page size: 10

When you have finished working in this page,

- Either, click on the **CRM logo** to return to the Dashboard (Home page),
- Or, click on the **arrow** in the top left of the screen, to go back to the previous page.



The screenshot displays the CO3 CRM interface for a customer named 'Hope Works'. The interface includes a top navigation bar with the company name 'Example Company' and a user profile 'Abigail Milne'. A sidebar on the left contains various functional tiles for managing the customer's account, 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's details, including their trading name, registered name, description, VAT number, registration number, rank, website, and phone number. A progress bar indicates a 91% completion status. The interface also features a search bar and a footer with the CO3 Technologies logo and copyright information.

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

Example Company

Abigail Milne

Hope Works

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

Abigail Milne

a.milne@noemail.com

012 345 6789

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CRM.002.015