

We are currently updating our site; thank you for your patience.

CRM CUSTOMERS

WARNINGS

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

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

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

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

ACCESS WARNINGS FROM THE DASHBOARD (HOME PAGE)

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

The screenshot shows a CRM dashboard for 'Example Company' with user 'Abigail Milne'. The dashboard includes a 'Dashboard' menu, a search bar, and several performance charts. A 'Warnings' widget is highlighted with a red circle and an arrow pointing to a detailed view of a warning for 'King Enterprises'.

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	5
Email	120	0	2
Meeting	40	0	1
On Site Inspection	50	0	1
Site inspection	2	0	0

Category	Value
Cases	15 000.00
Invoices	9 000.00
Orders	6 000.00
Quotes	3 000.00

Month	Value
Jul 2019	6 000.00
Aug 2019	1 000.00
Sep 2019	2 000.00
Oct 2019	0.00

Widget	Value
create cold call	0
recommendations	5
warnings	5
customers	74
cases	9
activities	9
quotes	5
equipment	147
3rd party	4

Warning Details:

- Subject:** Phone call - King Enterprises: Confirm meeting times with new Purchasing Manager
- When:** 23 Jul 2019, 17:00-18:00
- Who:** Jason King, King Enterprises
- Tel:** [Redacted]
- Email:** [Redacted]
- Cell:** 0123456789
- Bus:** 0123456789

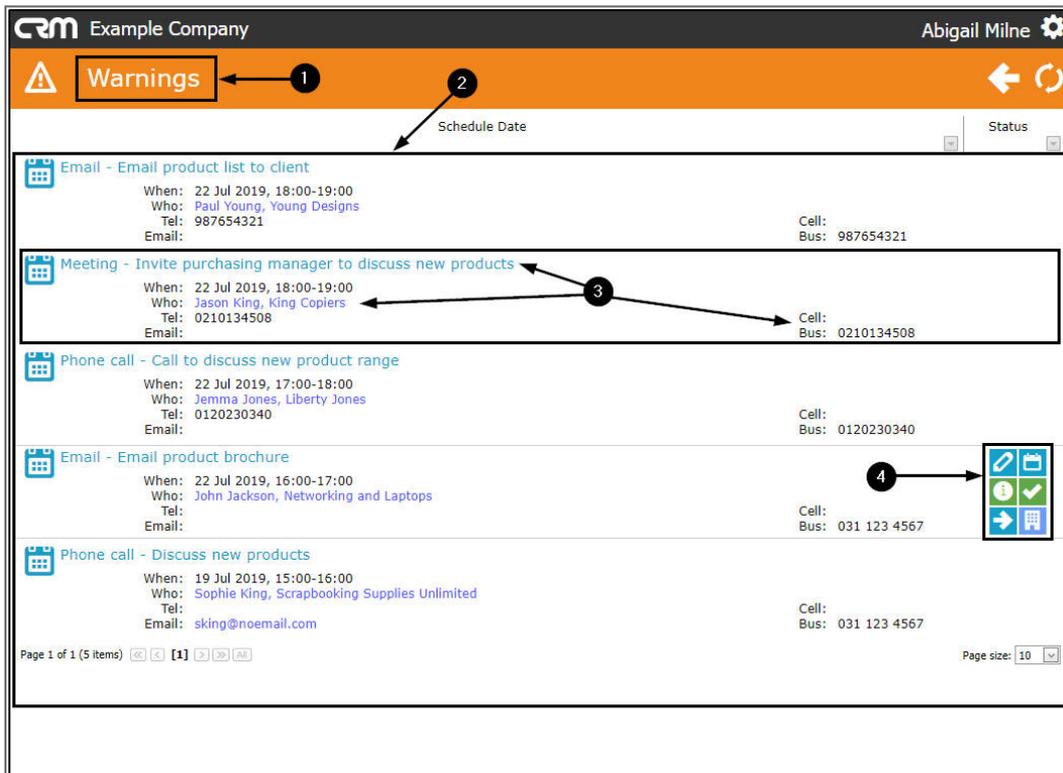
THE WARNINGS SCREEN (ALL CUSTOMERS)

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

WARNINGS 'ACTION ITEM' BUTTONS

4. Hover over any activity to reveal the **Action Item** buttons:

- **View / Edit this Activity**
- **Reschedule this Activity**
- **View Case info and history**
- **Close this case**
- **Next Action** (close current activity and create new activity)
- **View customer**



VIEW ACTIVITY SUMMARY

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

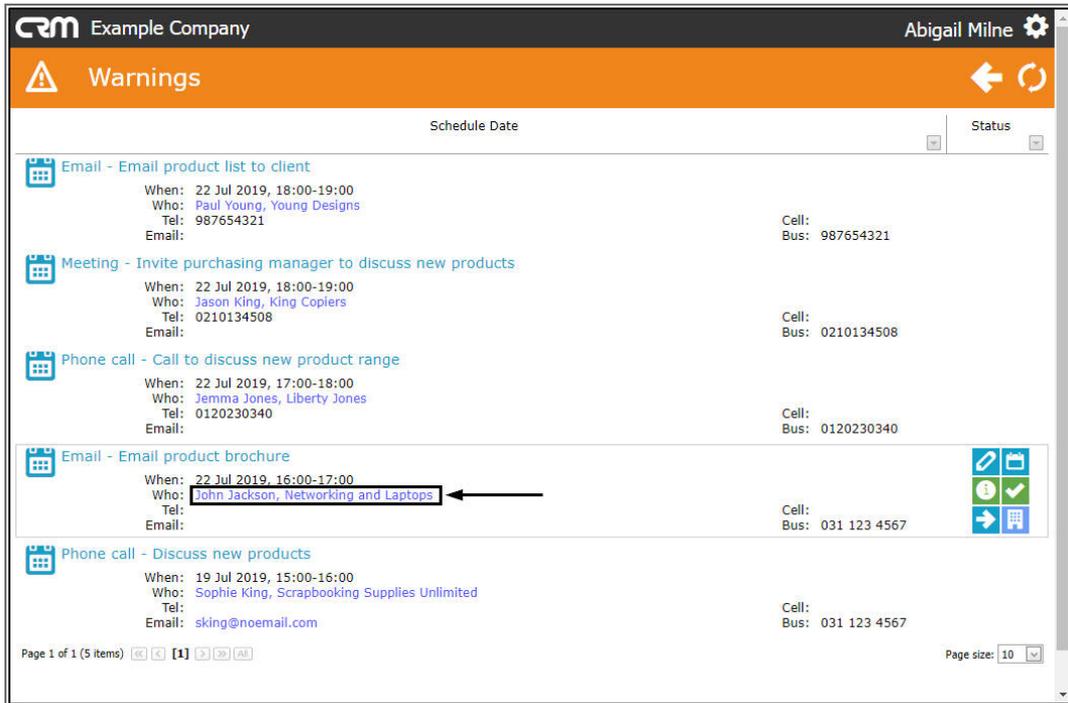
The screenshot shows a CRM interface titled "Warnings" for "Example Company". The user is "Abigail Milne". The interface displays a list of activities with columns for "Schedule Date" and "Status".

Activity	When	Who	Tel	Email	Cell	Bus
Email - Email product list to client	22 Jul 2019, 18:00-19:00	Paul Young, Young Designs	987654321		987654321	
Meeting - Invite purchasing manager to discuss new products	22 Jul 2019, 18:00-19:00	Jason King, King Copiers	0210134508		0210134508	
Phone call - Call to discuss new product range	22 Jul 2019, 17:00-18:00	Jemma Jones, Liberty Jones	0120230340		0120230340	
Phone call - Discuss new products	19 Jul 2019, 15:00-16:00	Sophie King, Scrapbooking Supplies Unlimited		sking@noemail.com	031 123 4567	031 123 4567

Callout 1 points to the "Who" field of the "Phone call - Call to discuss new product range" activity. Callout 2 points to the "Where" field of the same activity. The "Where" field contains: "22 River House, River Way, River Town, River City, Case: Potential New Deal, Comments: Client updating machines, Completion Notes:".

NAVIGATE TO THE CUSTOMER DASHBOARD

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



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

ACCESS WARNINGS FROM THE CUSTOMER DASHBOARD

4. Click on the **Warnings** tile.

The screenshot shows a CRM dashboard for 'Example Company' with user 'Abigail Milne'. The main navigation bar includes a menu icon, the text 'Networking and Laptops' (marked with a circled '1'), and a search bar. Below the navigation bar, there are three main sections: 'Activities for Last 30 Days', '1 Month Performance', and '4 Month Pipeline'. The 'Activities for Last 30 Days' section contains a table with columns for Description, Target, Existing Custmrs, and New Custmrs. The '1 Month Performance' section shows a bar chart for Cases, Invoices, Orders, and Quotes. The '4 Month Pipeline' section shows a bar chart for Jul 2019, Aug 2019, Sep 2019, and Oct 2019. On the left side, there is a grid of icons for various actions: create cold call, recommendations, warnings (marked with a circled '4'), customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files. The main content area displays 'Networking and Laptops - NET001' with a large question mark icon and a '50%' indicator. Below this, there is a table with columns for Trading Name, Registered Name, Description, VAT No, Registration, Rank, Website, and Phone. A '12 Months Sales History' chart is also visible, showing Contract Income and Sales Revenue from July 2018 to July 2019. At the bottom, there is a footer with '©2019 CO3 Technologies (Pty) Ltd (3.5.6.0 / 3.5.6.0)' and the CO3 TECHNOLOGIES logo.

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

The screenshot displays a CRM interface for 'Example Company' with user 'Abigail Milne'. The main heading is 'Warnings for Networking and Laptops'. Below this, there is a 'Schedule Date' field and a 'Status' dropdown menu. A detailed view of an email warning is shown, including the subject 'Email - Email product brochure', the scheduled time '22 Jul 2019, 16:00-17:00', and the recipient 'John Jackson, Networking and Laptops'. Contact information for 'Cell: 031 123 4567' and 'Bus: 031 123 4567' is also visible. The interface includes pagination controls ('Page 1 of 1 (1 items)') and a 'Page size' dropdown set to '10'. Four callout numbers are present: '1' points to the warning title, '2' points to the main content area, '3' points to the navigation arrows, and '4' points to the status dropdown.

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