

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

CRM CUSTOMERS

CUSTOMER DETAILS TILES

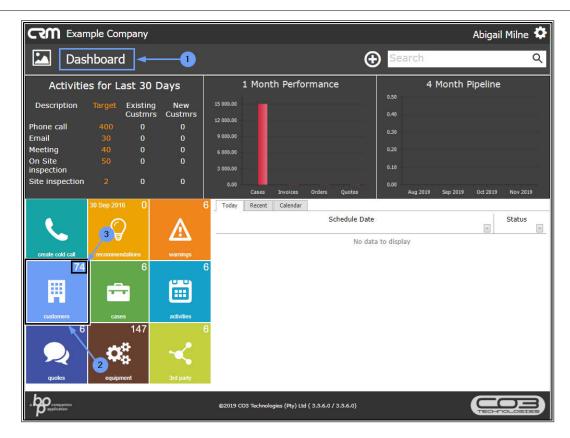
- In the Customer Dashboard (Customer Home page) you can click on customer Information tiles which will direct you pages containing information regarding:
 - Customer Sales History
 - Customer Addresses
 - Customer Contacts
 - Customer Open Activities
 - Customer **Notes**
 - Customer Salesmen

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

NAVIGATE TO THE CUSTOMER DASHBOARD

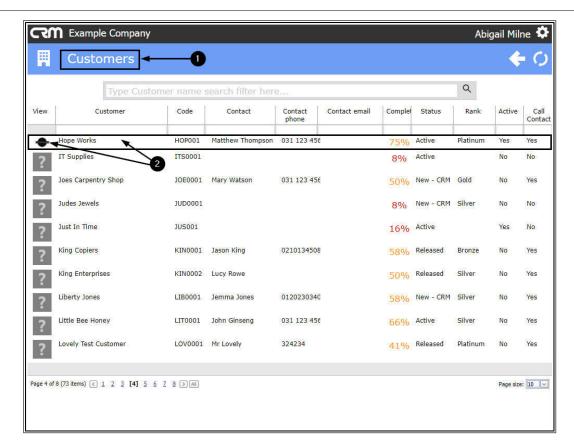
- 1. In the **Dashboard** (Home page),
- 2. Click on the **Customers** tile.
- 3. **Note:** The number in the top left of the tile indicates <u>how many</u> customers that you are linked to.





- 1. 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.
- 2. Select the specific customer that you wish to view by clicking on the **Customer Icon**, in the **View** column.





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

If you wish to have more <u>space</u> 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.





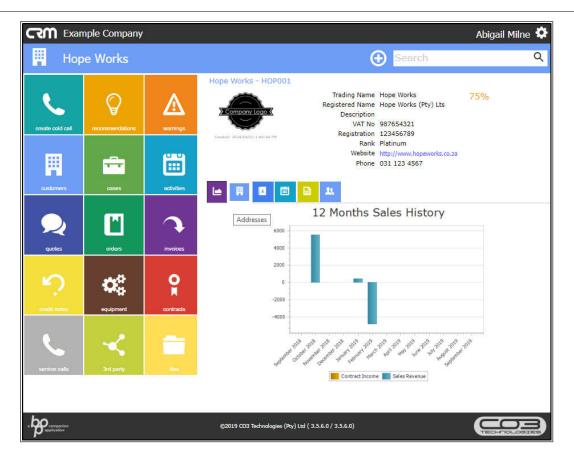
- 1. As you select the check box,
- 2. The **Dashboard panel** will disappear from the screen.





• Click <u>outside</u> of the Settings frame to view the full page <u>without</u> the Dashboard.





VIEW CUSTOMER DETAILS TILES

- 1. Here you can view the Customer **Details Tiles**.
- 2. **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.

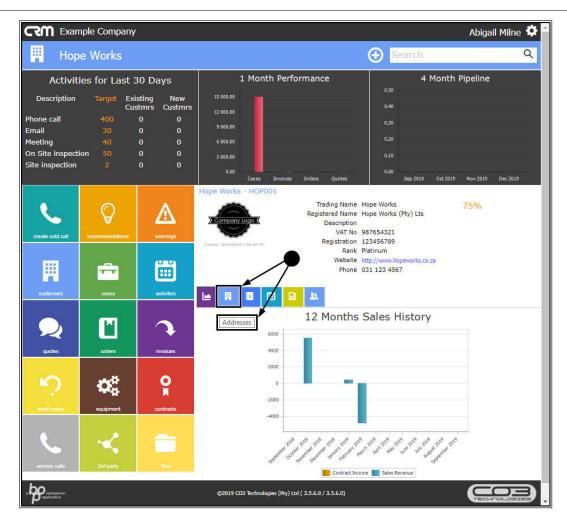




ADDRESSES

• 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 <u>viewed</u> here if you wish to make changes to the addresses, refer to customer addresses.

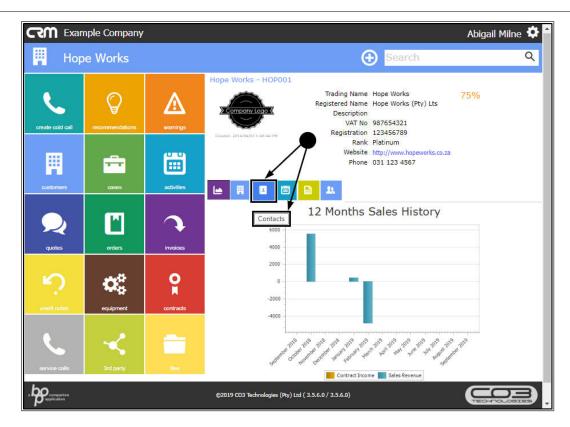




CONTACTS

• Client on the Contacts tile.





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

SHOW SALES / NON-SALES CONTACTS

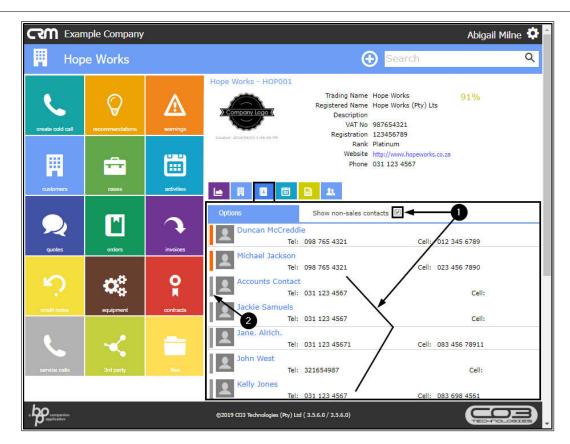
3. If you would like to see <u>all</u> the customer contacts, select the **Show non-sales contacts** checkbox.





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

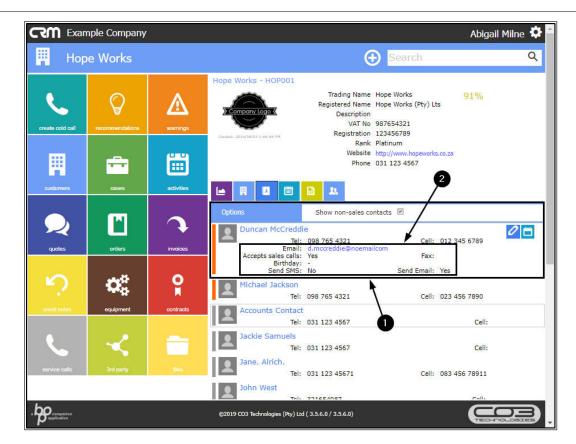




EXPAND CONTACT DETAILS

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





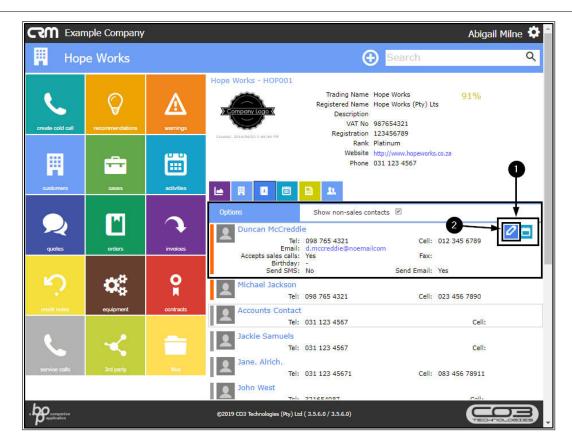
VIEW/EDIT THIS SALES CONTACT

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

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

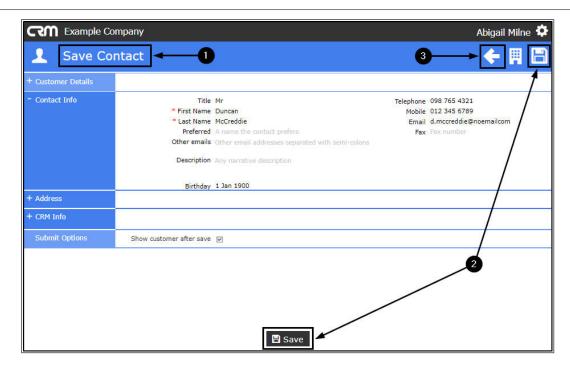
2. Click on the View/Edit this Contact button.





- 1. The Save Contact page will open.
- 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.

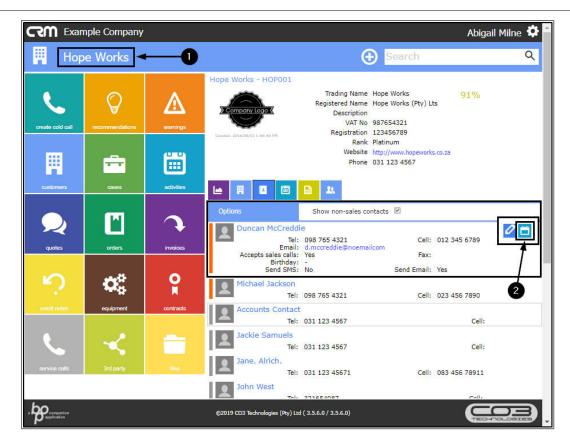




CREATE A NEW CASE AND ACTIVITY

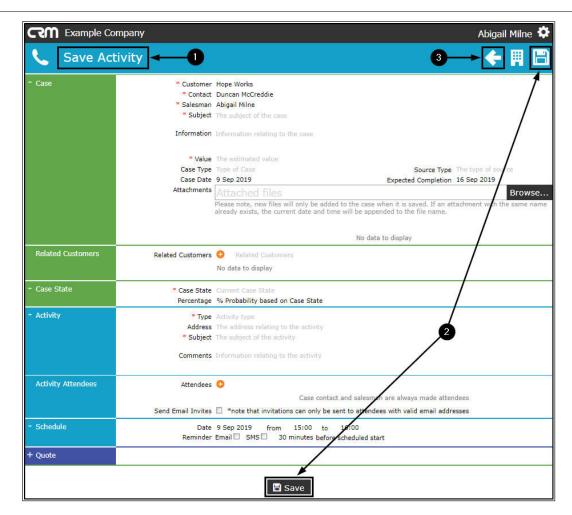
- In the **Customer** page,
- Click on the Create a new case and activity for this contact button.





- 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.





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 <u>selected</u> customer will be displayed in the Details frame.

View the Action buttons

2. Hover over a selected activity.





1. The customer Action buttons will be displayed.

CONTACTS

EXPAND CONTACT DETAILS

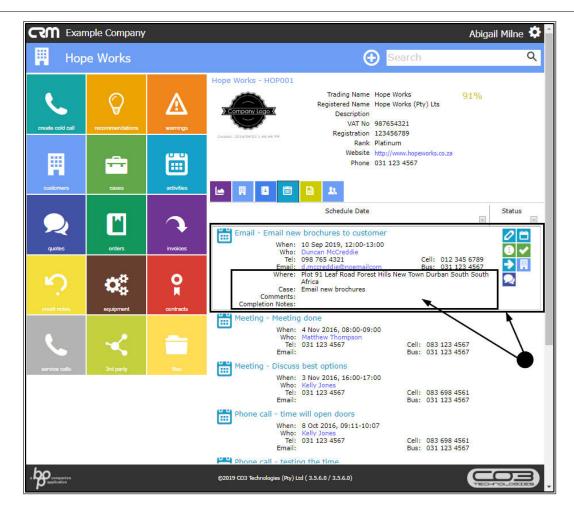
2. **Single click** anywhere on a selected activity (but not directly on any of the Action buttons).





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





NOTES

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





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





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 <u>viewed</u> here if you wish to make changes to the linked salesmen, refer to <u>Maintain Customer Salesmen</u>.

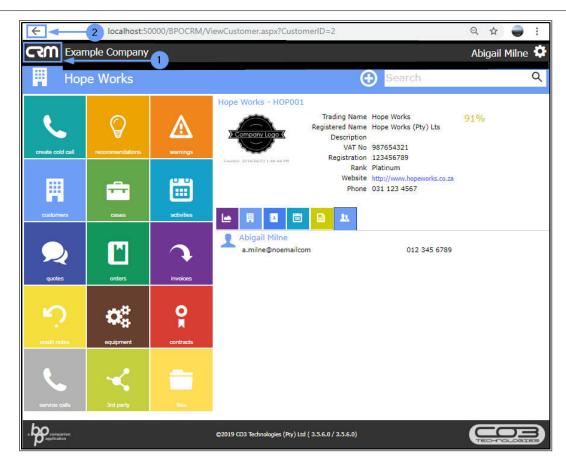




When you have finished working in this page,

- 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.





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