

CRM BASICS

ADD / EDIT A CUSTOMER

A customer can be added in CRM in order to follow up on leads, i.e. to create **Cases** and **Activities** for the Salesperson to further action.

These customers need to be checked in BPO for all details (such as VAT No, Credit Limit, etc.), and **approved** in BPO.

Note 1: You will only be able to view and / or edit current Customers where you are the main Salesperson, or are linked as a Salesperson, or configured as an Administrator.

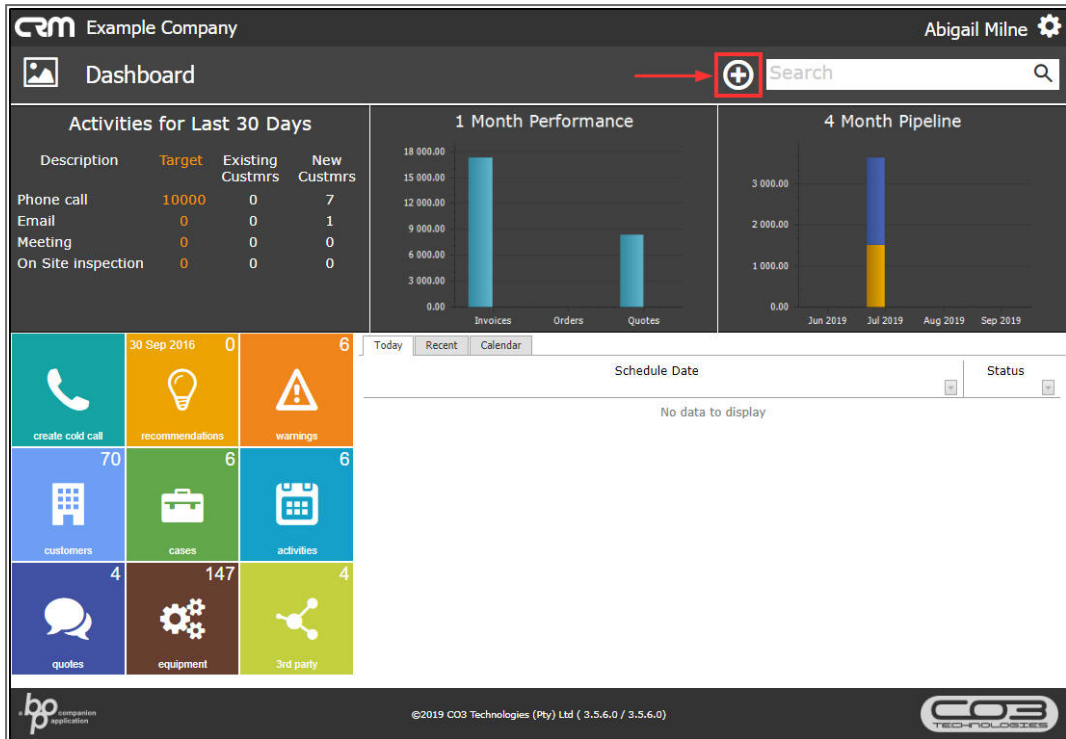
Note 2: After you save the customer, you need to **add a contact** / alternatively, use the **Add Contact** method - which allows you to either just add a Contact or add a new Customer and a new Contact.

Access: Webpage - [http://\[servername\]:\[portno\]/BPOCRM/User.aspx](http://[servername]:[portno]/BPOCRM/User.aspx)

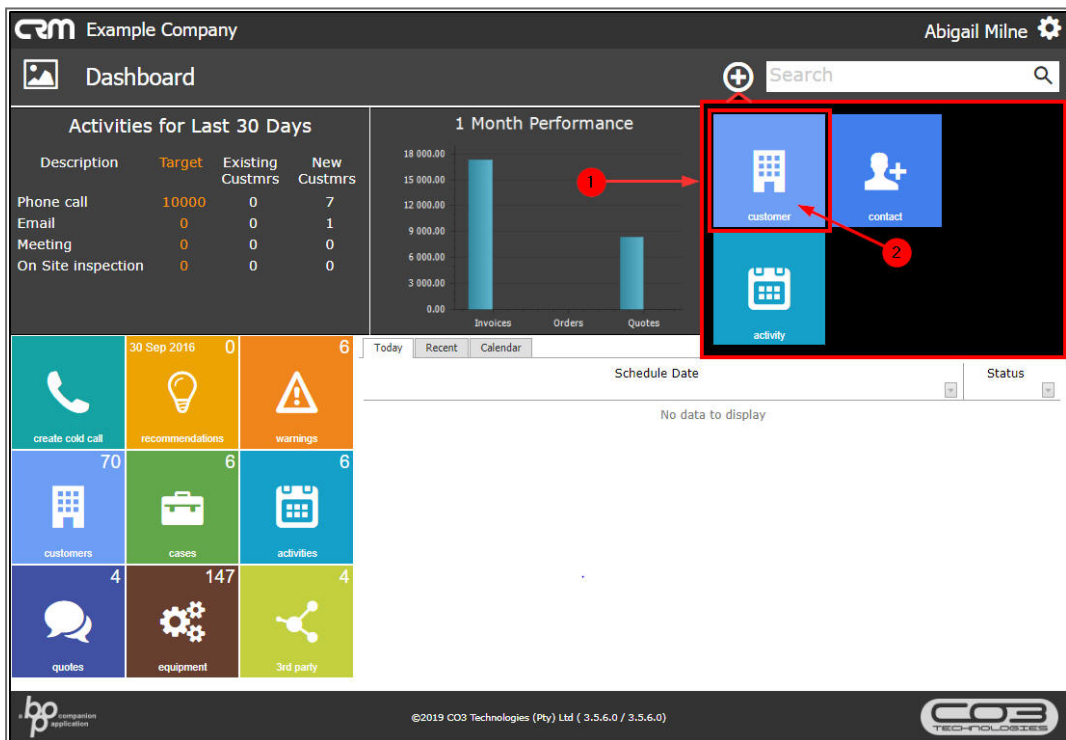
ADD A NEW CRM CUSTOMER

In the **CRM Dashboard** screen,

- Click on the **Add** [+] icon.

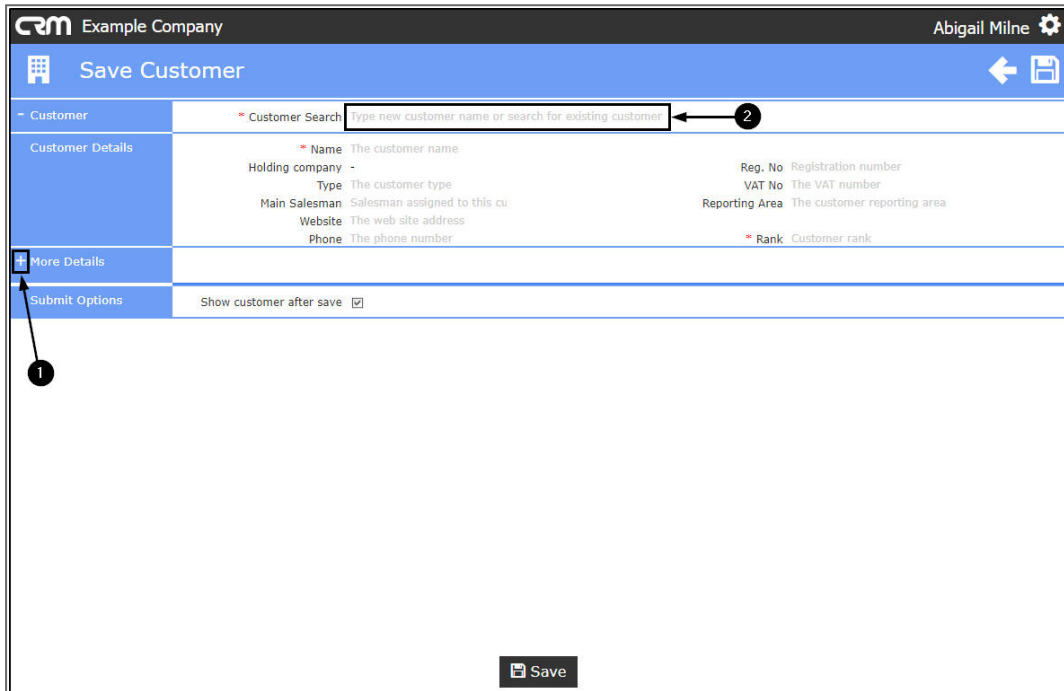


1. The **Add** pop up menu will appear.
2. Click on the **Customer** icon.

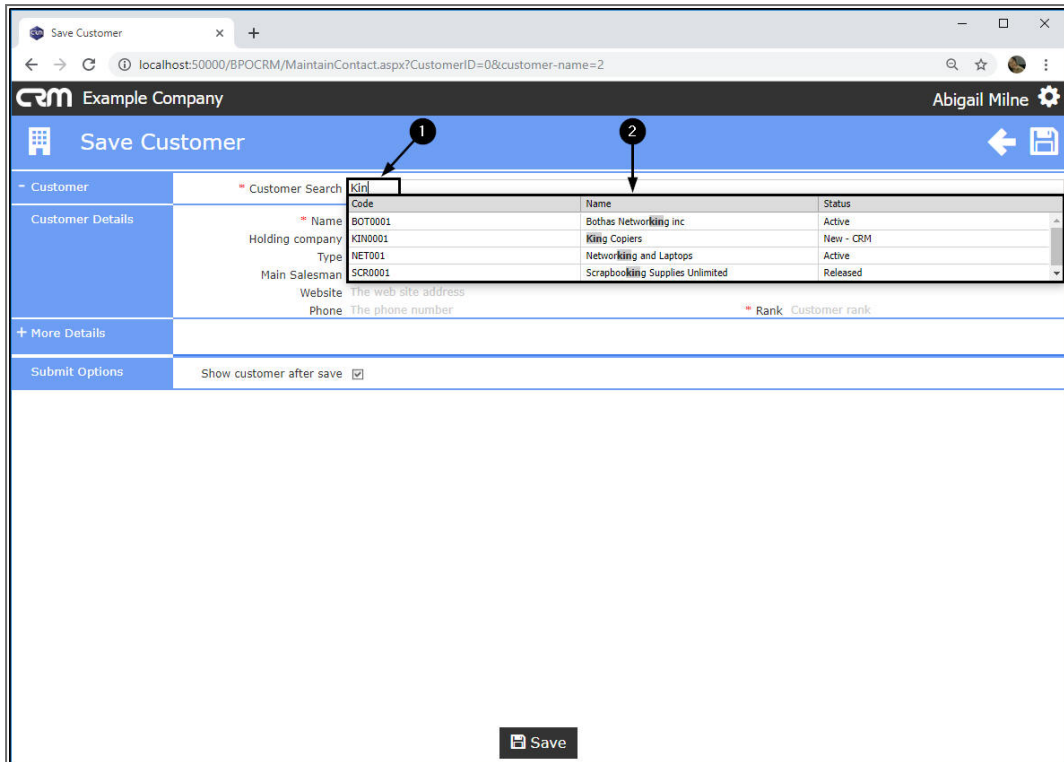


The **Save Customer** screen will be displayed.

1. You will note that the **More Details** frame is hidden. This is because these 'hidden' fields are not required to be entered before you can save the customer. This ensures the interface is uncluttered and therefore easier and more user-friendly for the salesman when entering mandatory customer information.
2. Click in the **Customer Search** text box.



1. Type in the **customer name**. As you type the system will search for similar customer names.
2. A data grid will pop up for you to check that you are not creating a duplicate customer.



Save Customer

CRM Example Company Abigail Milne

Save Customer

Customer Search: Kini

Code	Name	Status
BOTO001	Bothas Networking inc	Active
KIN0001	King Copiers	New - CRM
NET001	Networking and Laptops	Active
SCR0001	Scrapbookking Supplies Unlimited	Released

Customer Details

Name: BOTO001
 Holding company: KIN0001
 Type: NET001
 Main Salesman: SCR0001
 Website: The web site address
 Phone: The phone number
 Rank: Customer rank

Submit Options: Show customer after save

Save

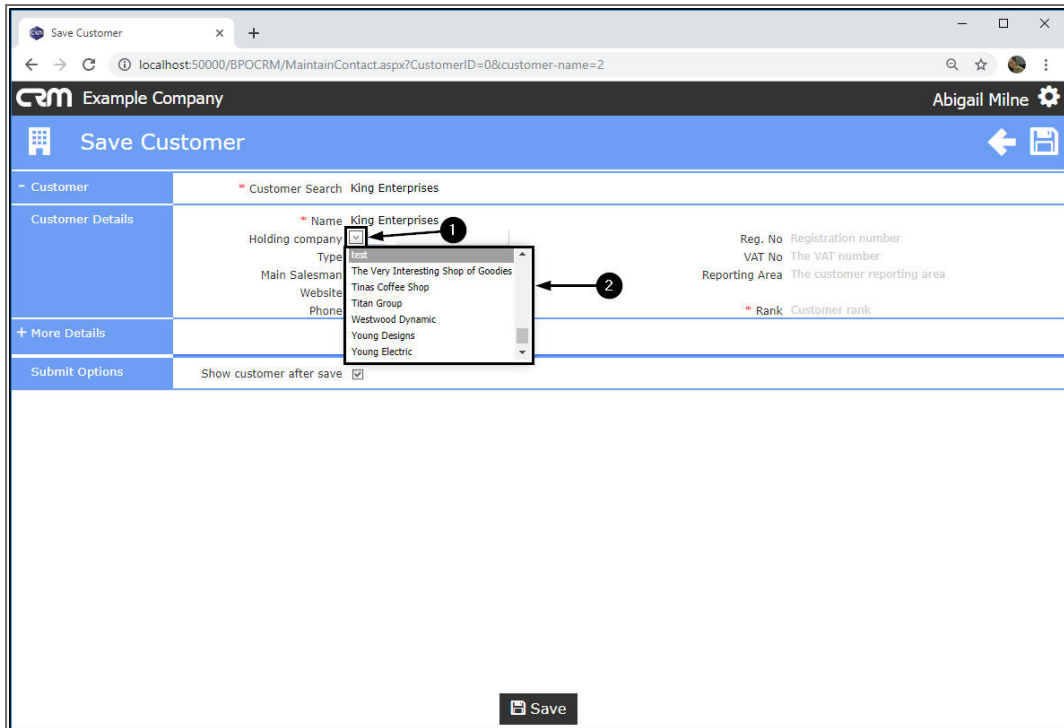
1. Once you have typed in the full customer name, **click away** from the customer search text box.
2. CRM will populate the **Name** field based on what was typed into the Customer Search textbox.
3. Now you can fill in the rest of the **Customer Details**.

HOLDING COMPANY

Only populate this field if you wish to set this customer up as a **Pastel-linked** customer. If you do link an account here, all transactions done for this customer will post to that account - based on what is set in **company configuration**.

1. Click in this field to display a **drop-down arrow**.
2. Click on this arrow to display a list of **holding companies**. Scroll through this list to search for and select the company that you wish to link to this new customer.

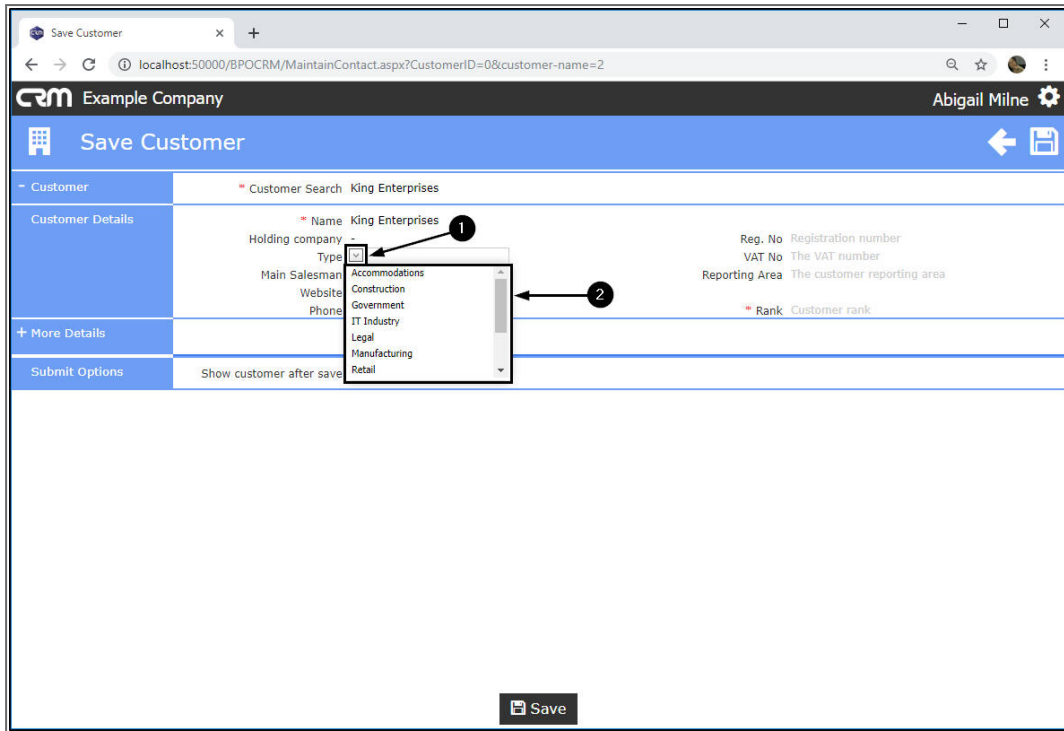
In this example, no holding company has been linked.



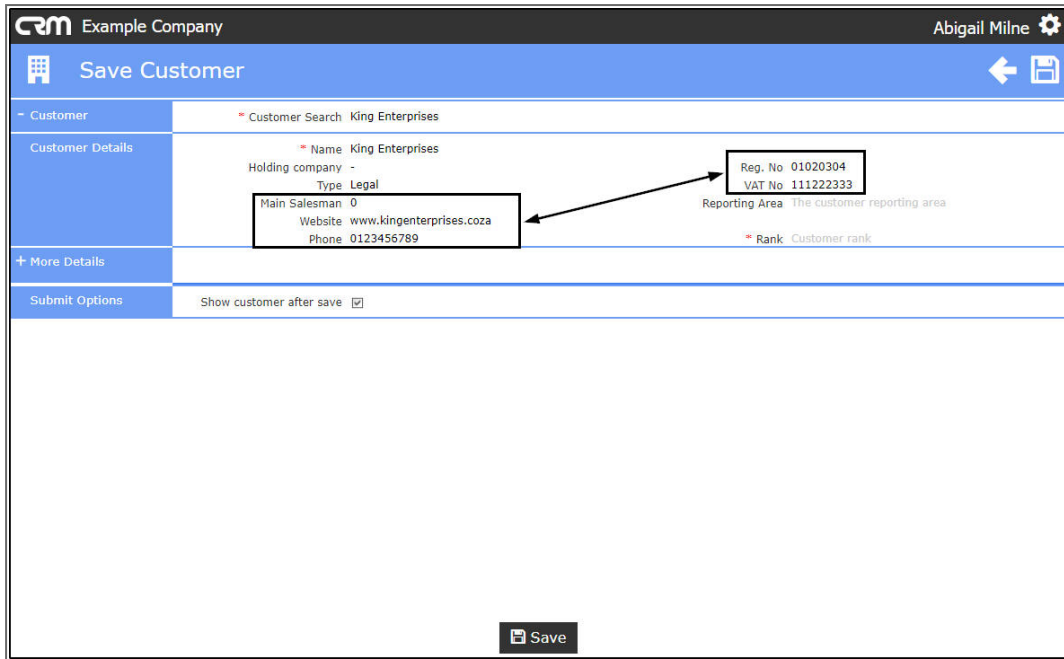
TYPE

It is useful to link the customer *type* for reporting purposes.

1. Click in this field to display a **drop-down arrow**.
2. Click on this arrow to display a list of **company types** (Manufacturing, Construction, Retail etc.) Scroll through this list to search for and select the relevant type.



- **Salesman:** This will auto populate with the salesman who is currently logged into CRM.
- **Website:** Type in the customer's website.
- **Phone:** Type in the customer's telephone number.
- **Reg. No:** Type in the customer registration number.
- **VAT No:** Type in the customer's VAT number.



The screenshot shows the 'Save Customer' form in a CRM system. The form is titled 'Save Customer' and is for the customer 'King Enterprises'. The form is divided into several sections:

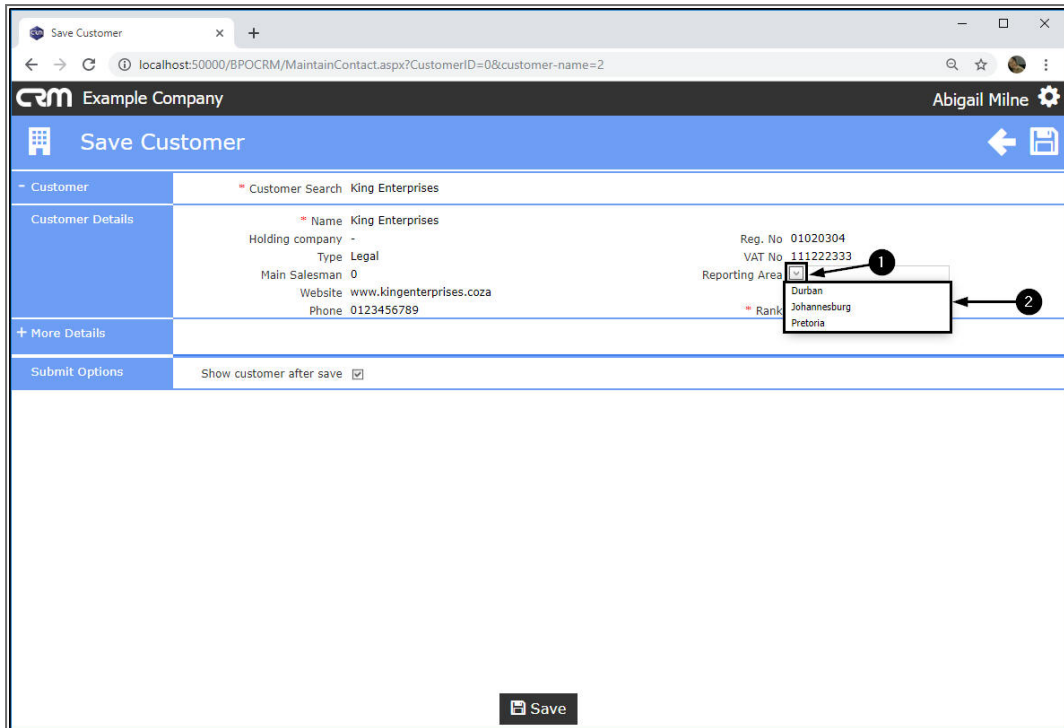
- Customer Search:** King Enterprises
- Customer Details:**
 - Name: King Enterprises
 - Holding company: -
 - Type: Legal
 - Main Salesman: 0
 - Website: www.kingenterprises.co.za
 - Phone: 0123456789
 - Reg. No: 01020304
 - VAT No: 111222333
 - Reporting Area: The customer reporting area
 - Rank: Customer rank
- More Details:** (Collapsed)
- Submit Options:** Show customer after save

A 'Save' button is located at the bottom right of the form. Two arrows point to the 'Reg. No' and 'VAT No' fields, indicating they are required or important.

REPORTING AREA

Each customer must be linked to a reporting area in CRM. These Reporting Areas give you the ability to categorise your clients, or group them into specific physical or otherwise pre-defined areas e.g. Sandton, Nelspruit, etc. Customer [Reporting Areas](#) can be set up in the Configurator.

1. Click in this field to display a **drop-down** arrow.
2. Click on this arrow to display a list of **areas** (Durban, Johannesburg, Pretoria etc.) Scroll through this list to search for and select the relevant area.

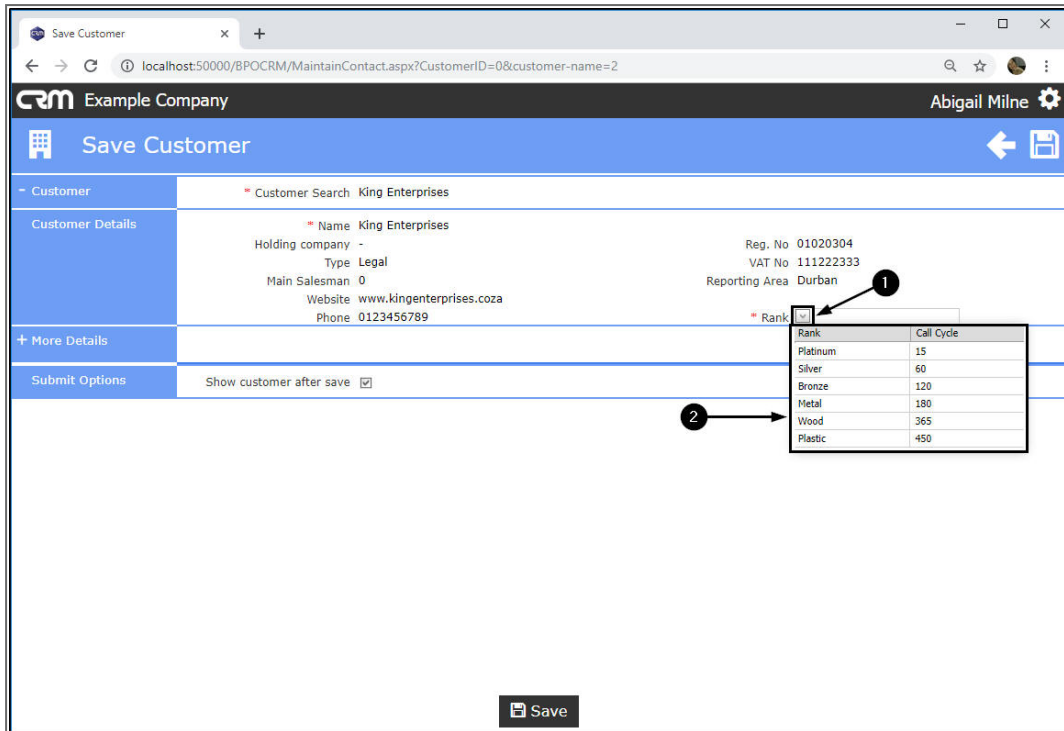


RANK

Rank is based on how much you *value* this customer and helps to define the call cycle per client. For example, a **Wood** ranking indicates that you will only contact this customer every **365** days - this customer is not valuable to you. However a **Platinum** ranking indicates that this is a very important customer that you wish to maintain a good relationship with, therefore you will contact them every **15** days.

Each customer must be linked to a Rank in CRM. [Customer Rank](#) can also be linked in the Customer Maintenance screen in BPO2.

1. Click in this field to display a **drop-down arrow**.
2. Click on this arrow to display a list of **Ranks** (e.g. Platinum, Bronze, Wood) with their corresponding Call Cycles (e.g. 15, 120, 365 days). Scroll through this list to search for and select the relevant rank from this list.



SUBMIT OPTIONS

The 'Show Customer After Save' check box

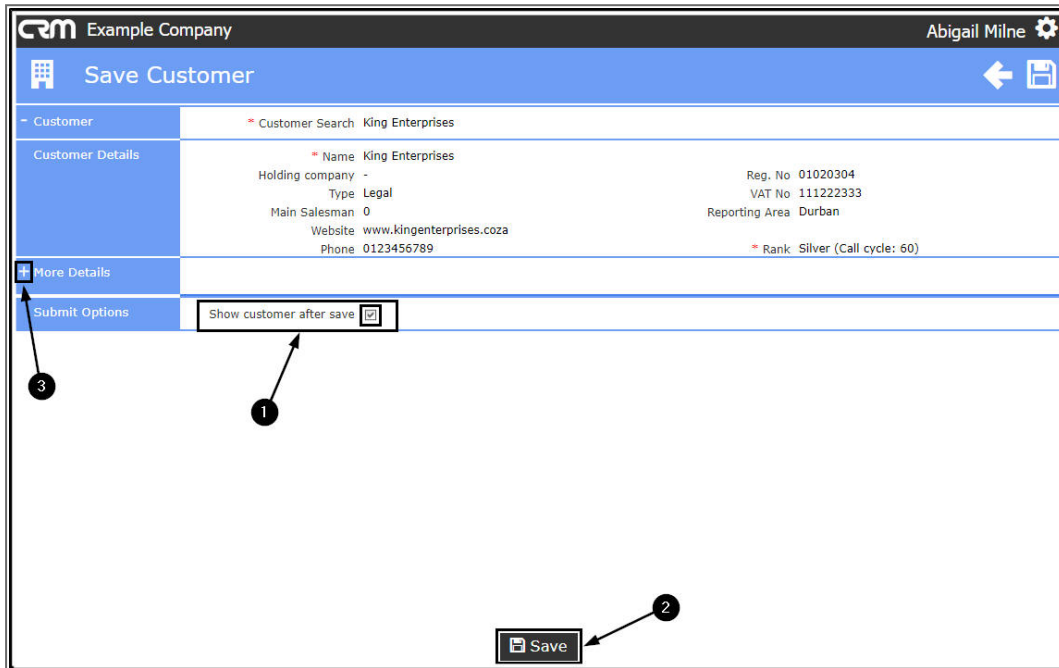
You may decide to **save** the customer at this point, with these minimum required details.

- Before you click on Save, go to the **Show customer after save** check-box.
 - If you **tick** this check box, when you click on Save, you will return to the CRM Dashboard home screen, with the newly created customer details displaying in the **Today** frame.
 - If you do not tick this check box, when you click on Save, you will return to the CRM Dashboard home screen, and the newly entered customer details will not display.
- You can select to **Save** the customer at this point as you have entered all the required fields.

However, for the purposes of this manual, we will now explore the *More Details* frame.

MORE DETAILS

3. Click on the *expand* icon in front of *More Details*.



The screenshot shows a CRM interface for 'Example Company' with the user 'Abigail Milne'. The main heading is 'Save Customer'. The form is divided into several sections:

- Customer Search:** King Enterprises
- Customer Details:**
 - Name: King Enterprises
 - Holding company: -
 - Type: Legal
 - Main Salesman: 0
 - Website: www.kingenterprises.co.za
 - Phone: 0123456789
 - Reg. No: 01020304
 - VAT No: 111222333
 - Reporting Area: Durban
 - Rank: Silver (Call cycle: 60)
- More Details:** This section is expanded, showing a 'Show customer after save' checkbox.
- Submit Options:** Contains the 'Show customer after save' checkbox.
- Save Button:** Located at the bottom right of the form.

Numbered callouts in the image indicate: 1 points to the 'Show customer after save' checkbox; 2 points to the 'Save' button; 3 points to the 'More Details' section header.

The frame will be expanded.

1. Text Fields

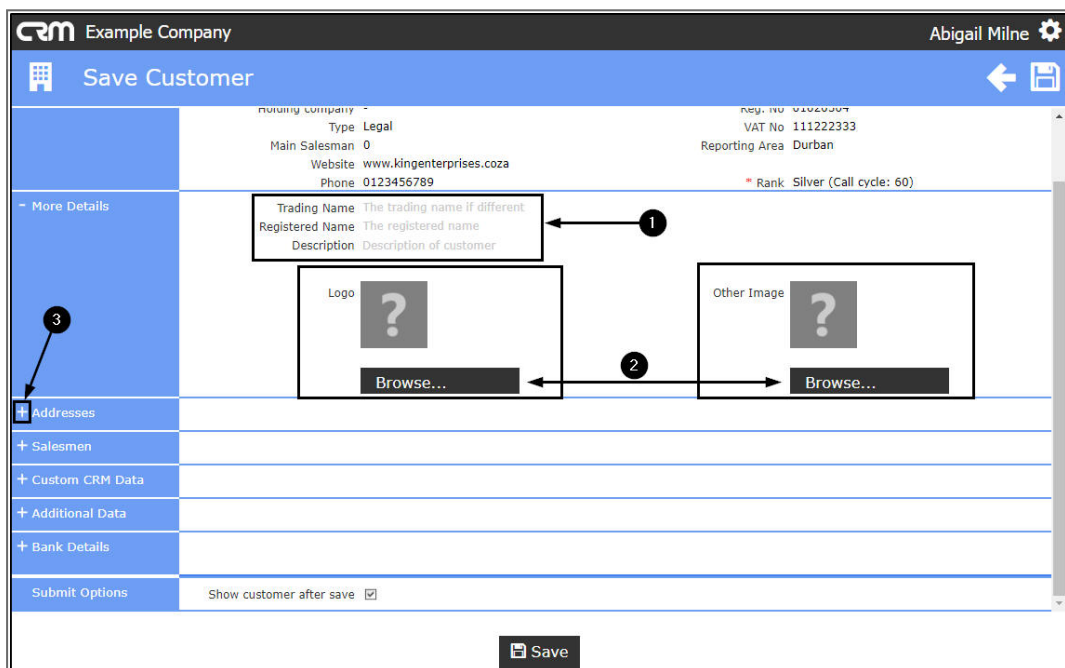
- **Trading Name:** Type in the customer's trading name if this is different from the Customer Name.
- **Registered Name:** Type in the customer's registered name, if required.
- **Description:** Type in comment to describe this customer for reference purposes.

2. Image Fields

- **Logo:** You can click on the Browse button to search for and select a main company image for this customer.
- **Other Image:** You can click on the Browse button to search for and select an additional image for this customer.

Addresses

- When you have finished adding details to this frame, click on the **expand** icon in front of **Addresses**.



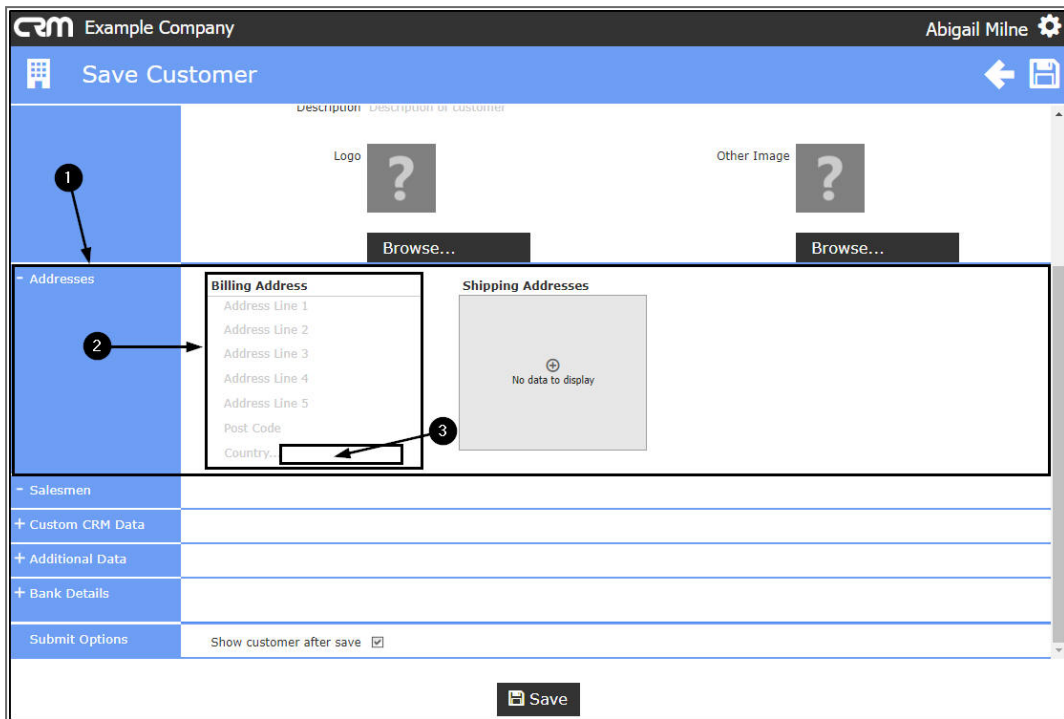
The screenshot shows the 'Save Customer' form in a CRM system. The form is titled 'Save Customer' and includes a navigation menu on the left with options like 'Addresses', 'Salesmen', 'Custom CRM Data', 'Additional Data', and 'Bank Details'. The 'Addresses' section is expanded, showing fields for 'Trading Name', 'Registered Name', and 'Description'. Below these fields are two image upload sections: 'Logo' and 'Other Image', each with a 'Browse...' button. A 'Save' button is located at the bottom of the form. The form also displays company details such as 'Type: Legal', 'Main Salesman: 0', 'Website: www.kingenterprises.co.za', 'Phone: 0123456789', 'VAT No: 111222333', 'Reporting Area: Durban', and 'Rank: Silver (Call cycle: 60)'. A 'Submit Options' section at the bottom has a checkbox for 'Show customer after save' which is checked.

- The **Addresses** frame will be expanded.

Billing Address

- **Note:** There can only be one Billing Address.
- Address Lines 1-5 and Postcode:** Click in the Address Line fields and type in the Billing (Postal) Address details.

3. **Country:** Click in the Country field.



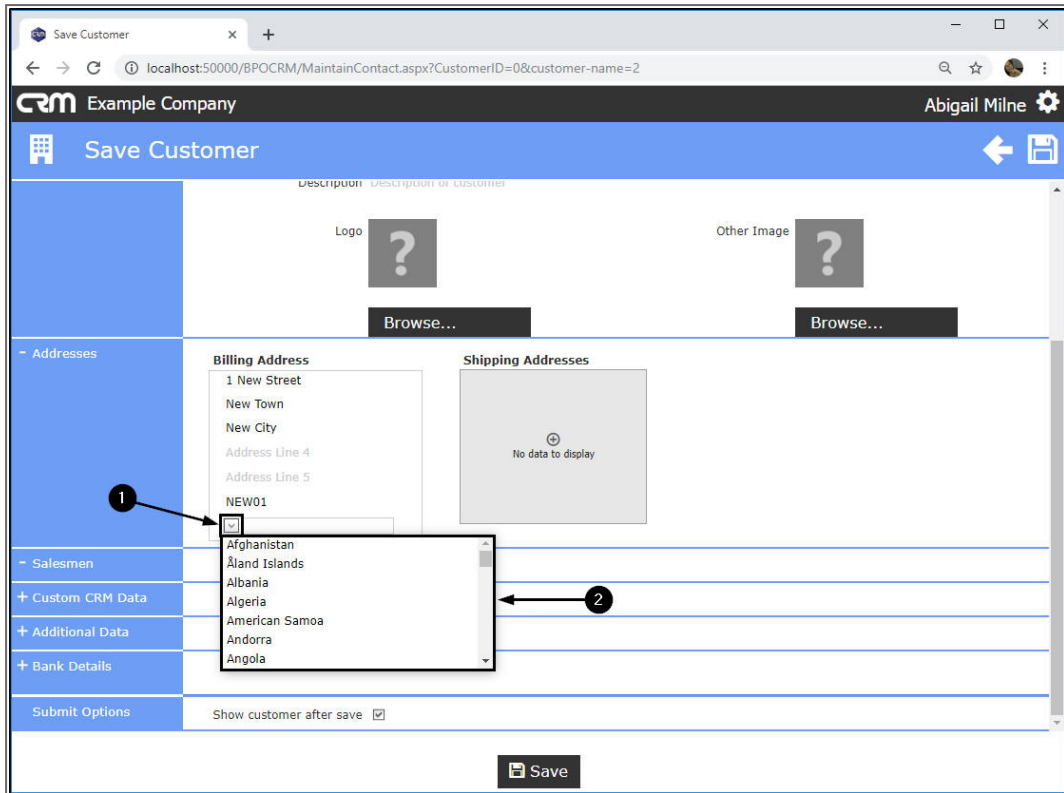
The screenshot shows the 'Save Customer' form in a CRM system. The form is titled 'Save Customer' and is part of the 'Example Company' CRM. The user is 'Abigail Milne'. The form includes several sections:

- Description:** A field for 'Description of customer'.
- Logo:** A field with a question mark icon and a 'Browse...' button.
- Other Image:** A field with a question mark icon and a 'Browse...' button.
- Addresses:** A section containing:
 - Billing Address:** Fields for Address Line 1, Address Line 2, Address Line 3, Address Line 4, Address Line 5, Post Code, and Country. A dropdown menu is open for the Country field, showing a list of countries.
 - Shipping Addresses:** A field with a question mark icon and a 'No data to display' message.
- Salesmen:** A field.
- Custom CRM Data:** A field.
- Additional Data:** A field.
- Bank Details:** A field.
- Submit Options:** A checkbox for 'Show customer after save' which is checked.
- Save:** A button at the bottom of the form.

Numbered callouts in the image indicate the following steps:

1. Click in the Country field.
2. A list of countries will display. Select the relevant country from the list.
3. Select the relevant country from the list.

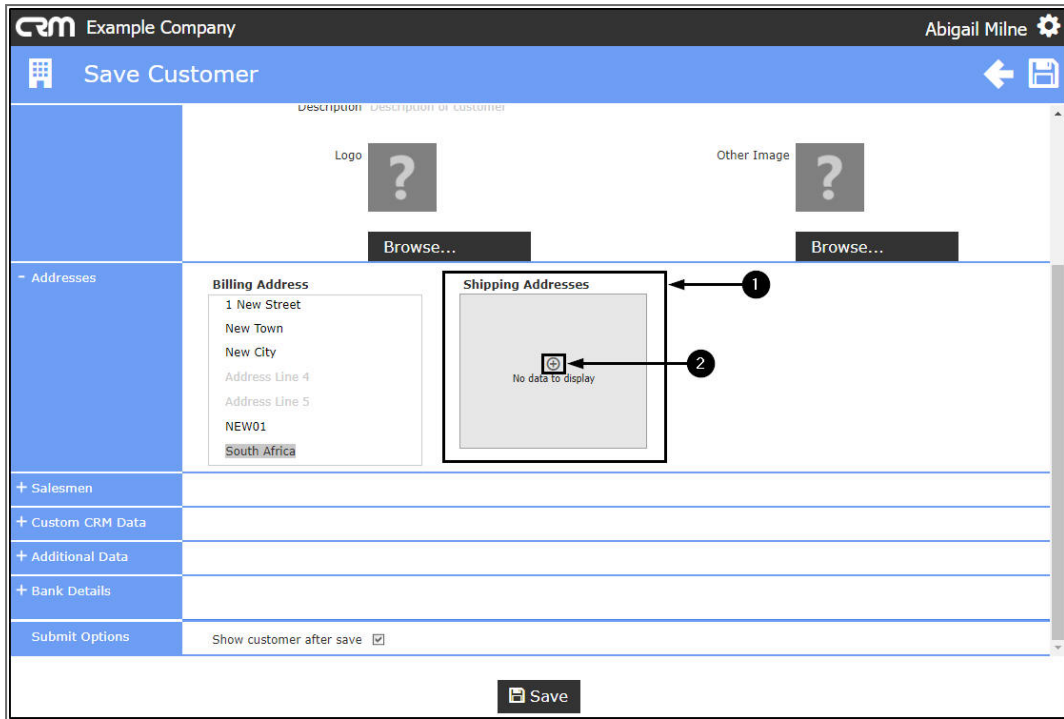
1. You can either type directly in this field or click on the drop-down arrow that appears.
2. A list of countries will display. Select the relevant country from the list.



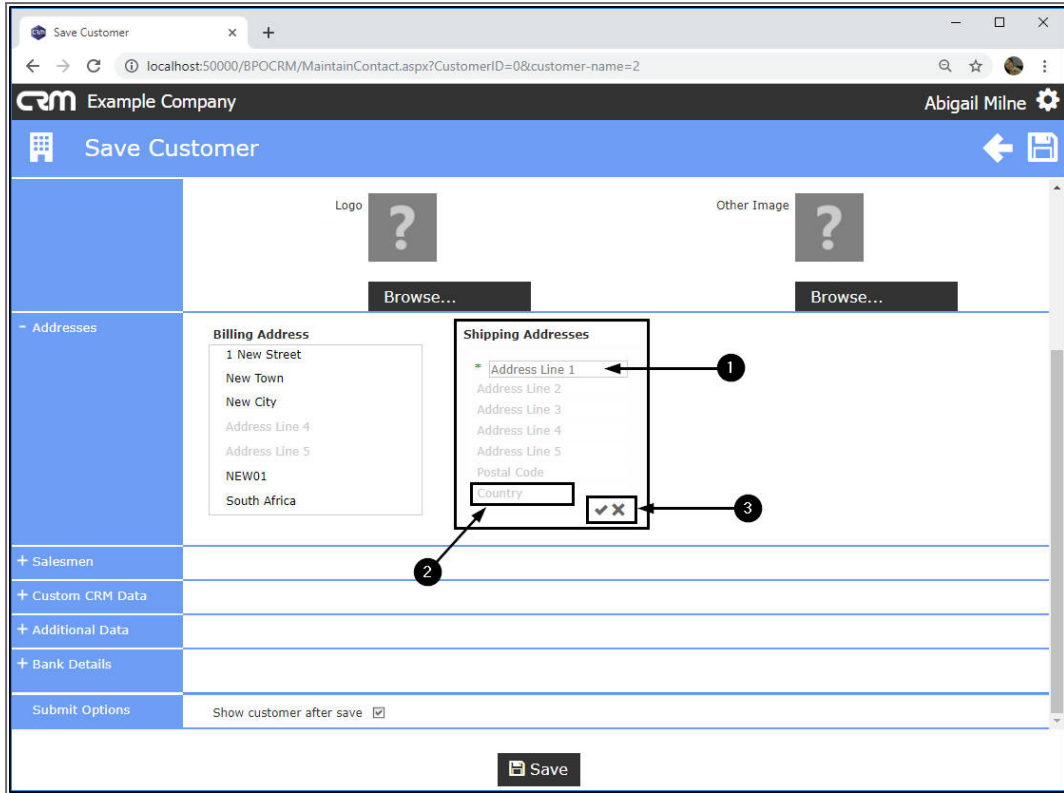
Shipping Addresses

- Note:** There can be more than one Shipping Address. For example, one customer can have many sites (shipping Addresses) where machines can be delivered and/or serviced.

1. Move across to the **Shipping Address** text box.
2. Click on the **expand** icon.



1. **Address Lines 1-5 and Postcode:** Click in the Address Line fields and type in the Shipping Address details.
 - **Note:** This is where the actual work will be done e.g. the machine will be delivered or serviced at this address.
2. **Country:** Click in the Country field and either type directly in the field or select from the list displayed, the relevant country.
3. You will note that this frame contains different icons from the Billing Address frame: an **Apply Changes** icon [] and a **Cancel** icon [x]. This is because of the additional addresses functionality which will be explained in the next few images.

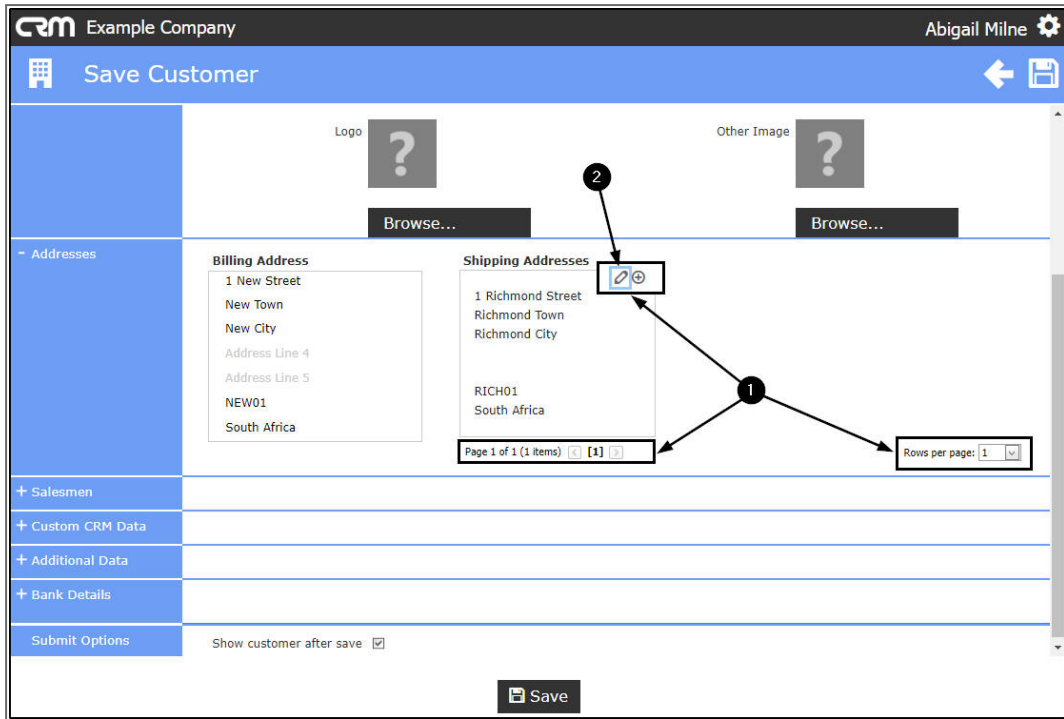


1. When you have typed in the Shipping Address details,
2. Click on the **Apply Changes** [] icon.

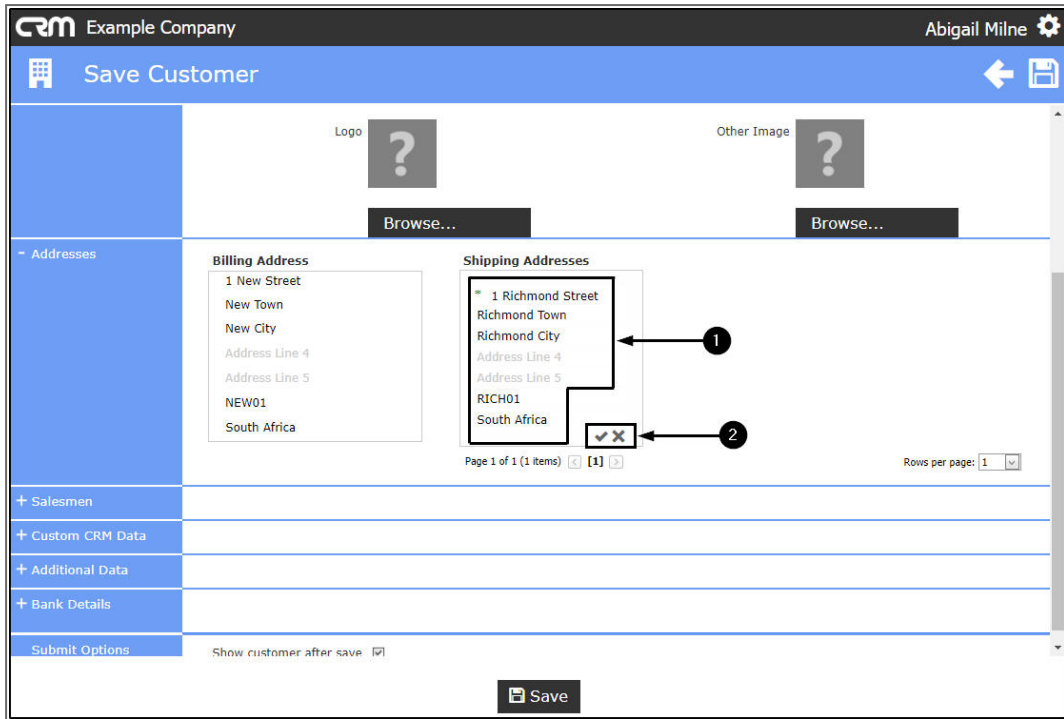
1. New fields and icons will now appear in the Addresses frame.

Edit Shipping Address

2. Click on the ***Edit*** icon.



1. You can edit the Shipping Address details as required.
2. Then either click on the **Apply Changes []** icon to save your changes or the **Cancel [x]** icon to cancel any changes made.



The screenshot shows the 'Save Customer' form in a CRM system. The form is titled 'Save Customer' and is for 'Example Company'. It includes a navigation bar with a back arrow and a save icon. The main content area is divided into several sections:

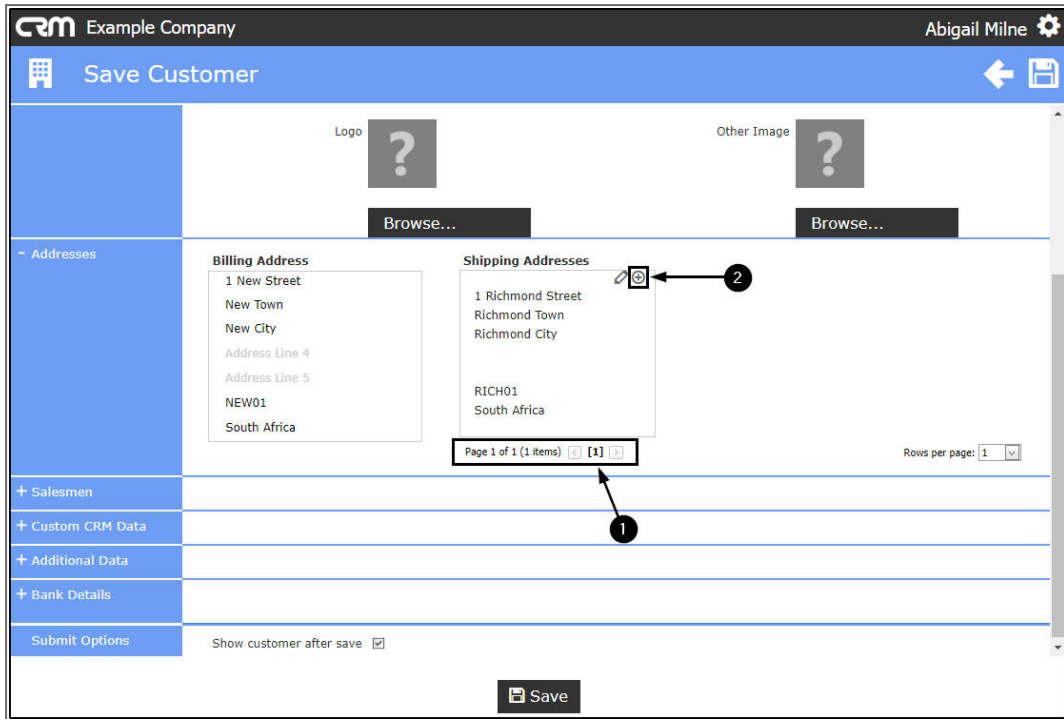
- Logo:** A placeholder with a question mark and a 'Browse...' button.
- Other Image:** A placeholder with a question mark and a 'Browse...' button.
- Addresses:** A section containing two address lists:
 - Billing Address:** A list of address lines: '1 New Street', 'New Town', 'New City', 'Address Line 4', 'Address Line 5', 'NEW01', and 'South Africa'.
 - Shipping Addresses:** A table with one row:

1	1 Richmond Street	Richmond Town	Richmond City	Address Line 4	Address Line 5	RICH01	South Africa
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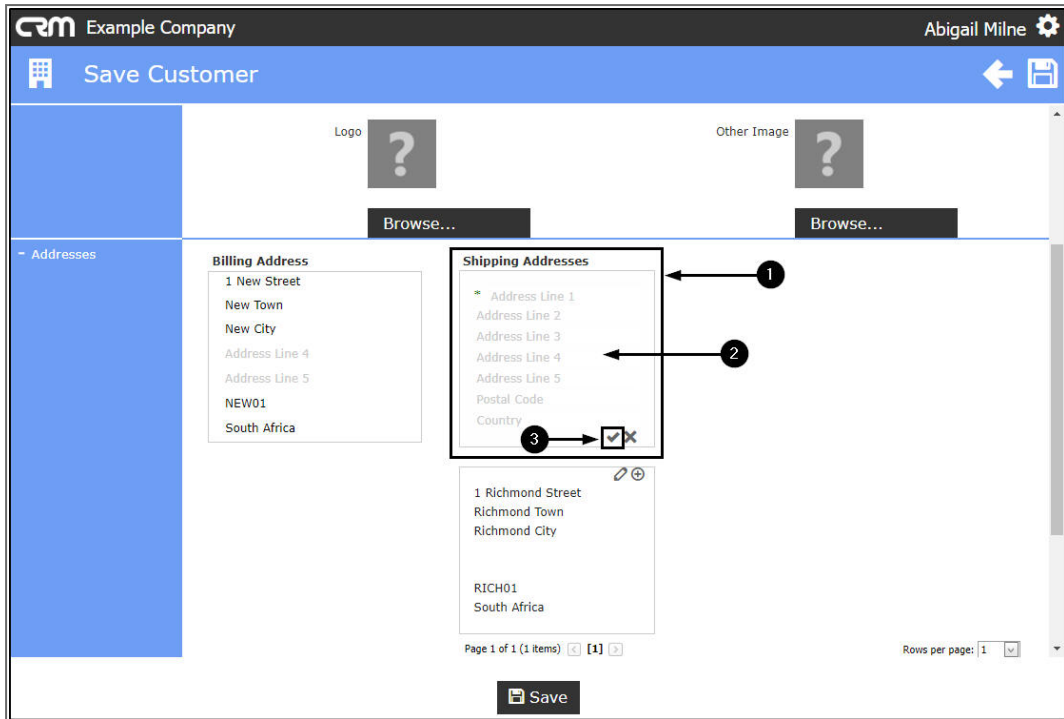
 Below the table is a page reference field: 'Page 1 of 1 (1 items) [1]'. A 'Rows per page: 1' dropdown is also present.
- Salesmen:** A section with a plus sign and a dropdown menu.
- Custom CRM Data:** A section with a plus sign and a dropdown menu.
- Additional Data:** A section with a plus sign and a dropdown menu.
- Bank Details:** A section with a plus sign and a dropdown menu.
- Submit Options:** A section with a checkbox labeled 'Show customer after save' and a 'Save' button.

Additional Shipping Addresses

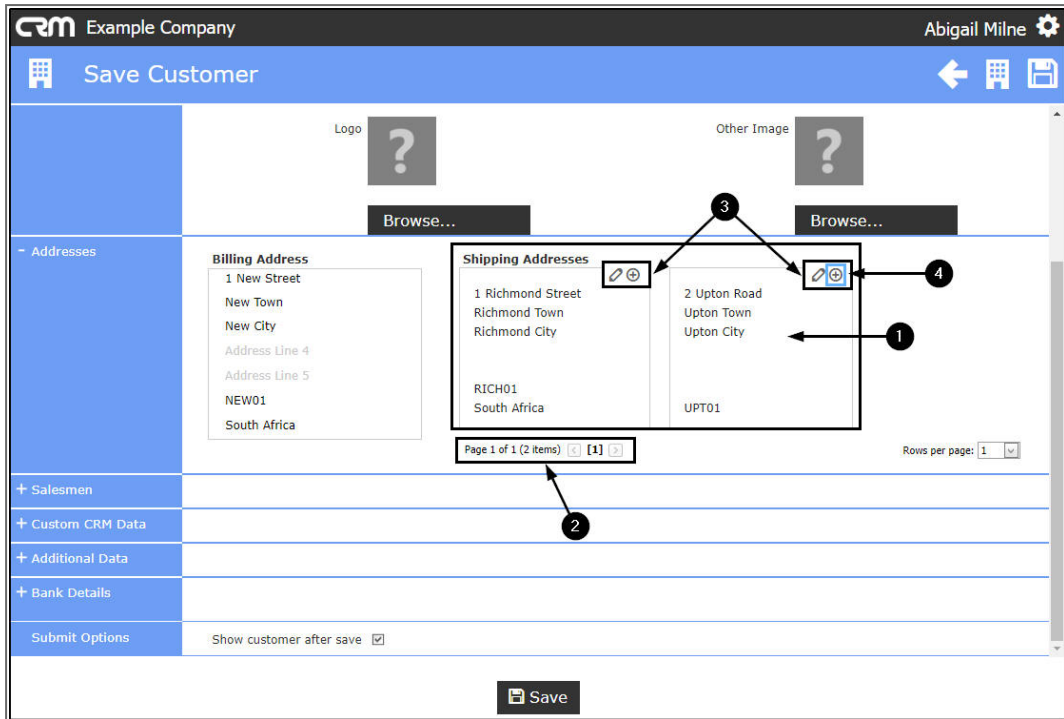
- You will note that this frame contains a **Page Reference** field.
 - In this example, this field displays:
 - [Page 1 of 1 (1 items)] [1]
 - This is because only **1** Shipping Address has been added to this customer.
- Click on the **plus [+]** icon in the Shipping Address frame.



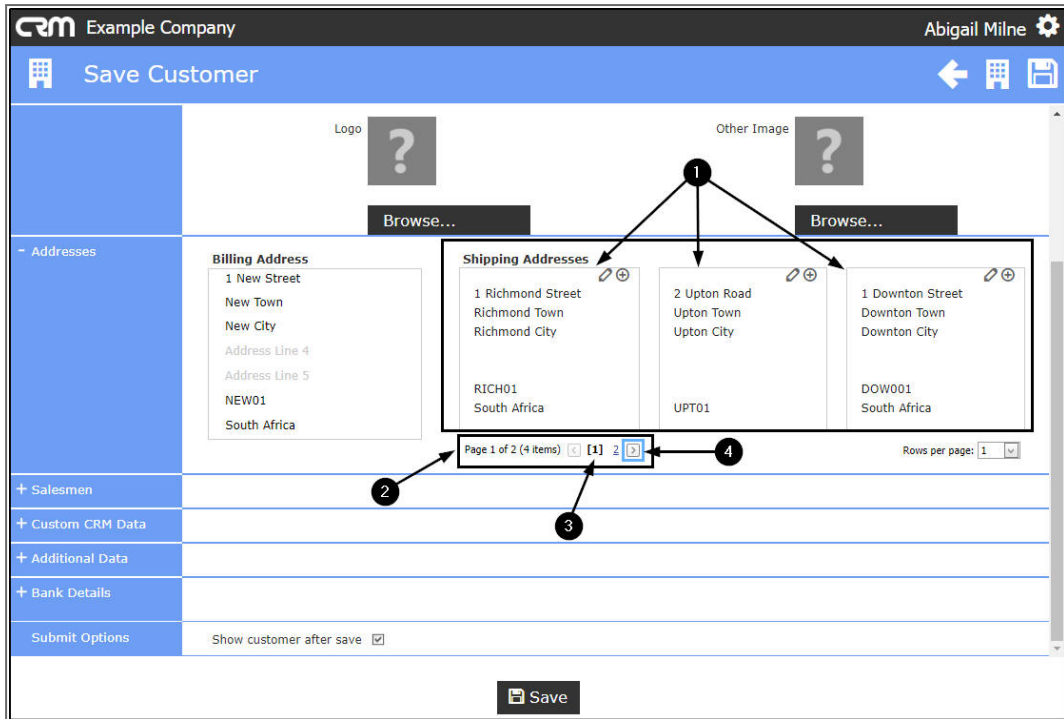
1. A second Shipping Addresses frame will open.
2. Fill in the second shipping details (as explained above).
3. Click on the **Apply Changes []** icon [].



1. The second Shipping Address will be added to the Addresses frame.
2. You will note that the Page References field now displays:
 - Page 1 of 1 (2 items) [1]
 as there are now **2** shipping addresses displayed on this page.
3. You can edit either of these addresses by clicking on the **Edit []** icon in the relevant Shipping Address frame. You can also click on the **Plus[+]** icon to add a third shipping address, if required.
4. For the purpose of explaining the **Page Reference** field further, **2** more Shipping Addresses have been added.



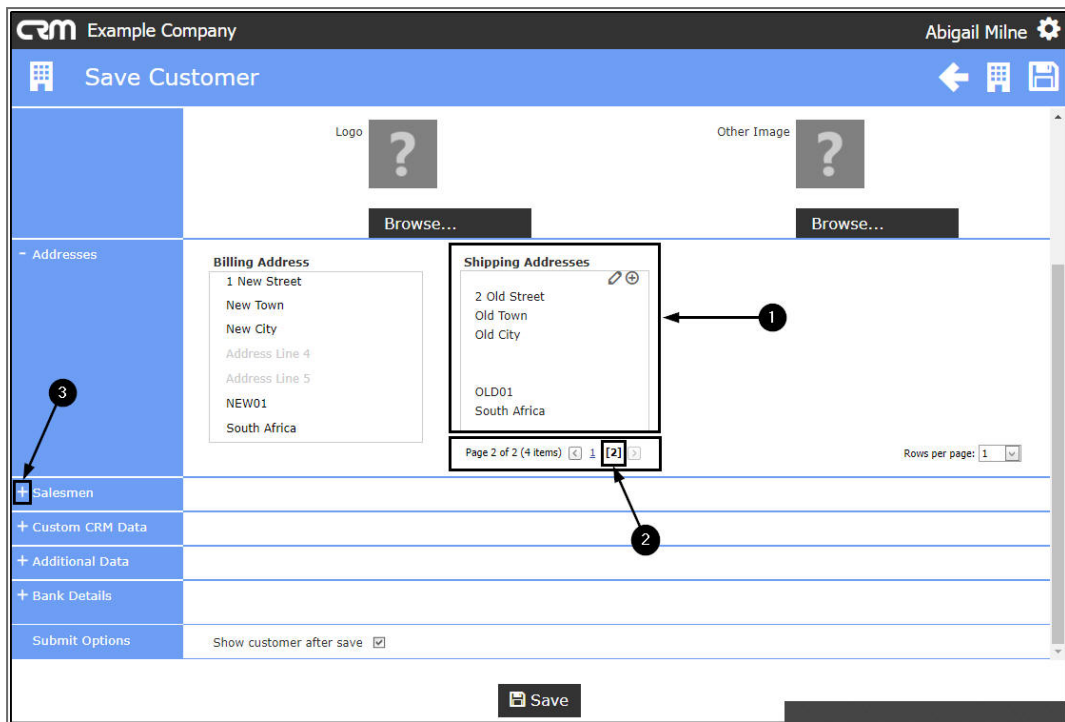
1. In this example, you can view **3** of the Shipping Addresses in the frame.
2. The Page References field will now display:
 - Page 1 of 2 (4 items).
3. The number in **bold** will tell you which page you are currently on.
4. To view the fourth Shipping Address, click on the *right arrow* to move onto the next page.



1. You can now view the **4th** Shipping Address
2. The **Page Reference** field will tell you that you are on the page **2** of the Addresses frame.

SALESMAN

3. When you have finished entering the Addresses details, click on the expand icon in front of **Salesmen**.



1. This frame will be **expanded**.
2. Select the check box(es) in front of any additional Salesperson(s) that you wish to link to this customer.

This is helpful for 2 reasons:

- This can be used as a reference from **BPO2** if the main Salesperson is not available.
- In **CRM** this also allows selected Salesperson(s) access to the Customer.

CUSTOM CRM DATA

3. When you have finished adding Salesmen if required, click on the expand icon in front of **Custom CRM Data**.

1. This frame will be expanded.
2. Custom **CRM Data field captions** and
3. **CRM Data drop-down field options** can be configured specific to your requirements.

Note : For any Additional Data that you wish to store against your customers, you can use the **Custom CRM Data fields** (outlined above) and **Additional Data fields** (outlined below). Follow the processes hyperlinked to rename the captions for these fields, depending on the information you need to store.

ADDITIONAL DATA

4. When you have finished adding Custom CRM Data, click on the expand icon in front of **Additional Data**.

1. This frame will be expanded.
2. Custom **Additional Data field captions** and
3. **Additional Data drop-down field options** can be configured specific to your requirements.

BANK DETAILS

4. When you have finished setting up Additional Data as required, click on the expand icon in front of **Bank Details**.

1. This frame will be expanded.
2. If you have the customer's banking details, you can type them in here.

SUBMIT OPTIONS – SHOW CUSTOMER AFTER SAVE CHECK BOX SELECTED

3. You have the option to view this customers details after save in the home screen.
 - If you ***tick*** this check box, when you click on Save, you will return to the CRM Dashboard home screen, with the newly created customer details displaying in the ***Today*** frame.
 - If you do not tick this check box, when you click on Save, you will return to the CRM Dashboard home screen, and the newly entered customer details will not display.

SAVE NEW CUSTOMER

4. Click on **Save** when you are done.

The screenshot shows the 'Save Customer' form in a CRM system. The form is titled 'Save Customer' and is for 'Example Company'. The user 'Abigail Milne' is logged in. The form contains several sections:

- Address Line 5:** NEW01, South Africa; RICH01, South Africa; UPT01; DOW001, South Africa.
- Salesmen:** A list of salesmen with checkboxes. Abigail Milne is checked. Other salesmen include Belinda Sharman, Bianca Du Toit, Carolina Lourens, Chris Haynes, George Reddy, Jonathan Twain, Karlien Young, Markus Ariliusic, Michae Johnson, and Susan Cooper.
- Custom CRM Data:** Favourite Sport, Lookup field, Lookup Other 2, Lookup field, Lookup Other 3, Lookup field, Lookup Other 4, Lookup field, Lookup Other 5, Lookup field, Lookup Other 6, Lookup field, Lookup Other 7, Lookup field, Lookup Other 8, Lookup field, Lookup Other 9, Lookup field, Lookup Other 10, Lookup field.
- Additional Data:** Additional Email Address, Other customer data, Other 2, Other customer data, Other 3, Other customer data, Other 4, Other customer data, Other 5, Other customer data, Other 6, Other customer data, Other 7, Other customer data, Other 8, Other customer data, Other 9, Other customer data, Other 10, Other customer data.
- Bank Details:** Bank Name: bank, Branch Code: 000000, Account Number: 0000000000, Branch Name: Branch, Account Name: Account name, Account Type: Bank account type.
- Submit Options:** Show customer after save .
- Save Button:** A button labeled 'Save' with a floppy disk icon.

Numbered callouts in the image point to:

- The 'Additional Data' section.
- The 'Bank Details' section.
- The 'Show customer after save' checkbox.
- The 'Save' button.

1. If you selected to **Show customer after save**, you will return to the home screen where it will now display **Customer Dashboard** in the title bar.

2. Here you can view the newly created customer details.

Note:

- the **Sales History** graph is now displayed
- there are new icons in this dashboard
- the percentage (%) of information gathered

CRM Example Company Abigail Milne

Customer Dashboard Search

Description	Target	Existing Custmrs	New Custmrs
Phone call	10000	0	7
Email	0	0	1
Meeting	0	0	0
On Site inspection	0	0	0

1 Month Performance

4 Month Pipeline

King Enterprises - KIN0002

Trading Name: King Enterprises (1.6%)
 Registered Name: King Enterprises
 Description: Solicitors Firm, 3 sites.
 VAT No: 111222333
 Registration: 01020304
 Rank: Silver
 Website: <http://www.kingenterprises.co.za>
 Phone: 0123456789

12 Months Sales History

Legend: Contract Income (Yellow), Sales Revenue (Blue)

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SUBMIT OPTIONS – SHOW CUSTOMER AFTER SAVE CHECK BOX UNSELECTED

1. If you did not select the *Show customer after save* check box, you will return to the CRM home screen Dashboard.
2. There will be no customer details displayed on the dashboard.

The screenshot shows a CRM dashboard for 'Example Company' with the user 'Abigail Milne'. The dashboard includes a 'Dashboard' menu item (marked with a red circle '1'), a search bar, and three main sections: 'Activities for Last 30 Days', '1 Month Performance', and '4 Month Pipeline'. Below these are several data cards for 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'equipment', and '3rd party'. A 'Schedule Date' window is open, showing 'No data to display' (marked with a red circle '2').

Description	Target	Existing Custmrs	New Custmrs
Phone call	10000	0	7
Email	0	0	1
Meeting	0	0	0
On Site inspection	0	0	0

Category	Value
Invoices	0.00
Orders	0.00
Quotes	8000.00

Month	Value
Jul 2019	3000.00
Aug 2019	0.00
Sep 2019	0.00
Oct 2019	0.00

Card	Value
create cold call	0
warnings	6
customers	73
activities	6
quotes	4
equipment	147
3rd party	4

CRM.000.004