

CRM BASICS

3 MONTH PIPELINE SUMMARY

In this frame you can view a graph of your Pipeline based on your active Cases. Pipeline months are set to 3 months by default, but this can be <u>configured</u> as per your company requirements. VAT is <u>not</u> displayed in the pipeline.

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

VIEW PIPELINE IN HOMEPAGE

- 1. In the CRM *Homepage*,
- 2. you can view the [] Month Pipeline frame.
 - Note: Pipeline months are set to <u>3</u> months by default, but can be <u>configured</u> as per your company requirements. In this example, the pipeline months have been set to <u>4</u>.
- 3. Click anywhere in this frame.



CRM Exa	mple (Company	2	2 Abi	gail Milne 🌣
🔼 Das	shboa	ard 🗲	-1	Search	Q
Activitie	s for	Last 30	Days	1 Month Performance 4 Month Pipe	eline
Description	Target	Existing Custmrs	New Custmrs	500.00 30 000.00	
Phone call		2	2		
Email		0	0	20 000.00	4
Meeting		0	0	200.00	
On Site	20	0	0	10 000.00	
Site		0	0		
inspection				Cases Invoices Orders Quotes Oct 2019 Nov 2019 D	ec 2019 Jan 2020
	15 Oct	2019 19		12 Today Recent Calendar	
		\bigcirc	Δ	Schedule Date 3	Status
create cold call	recon	nmendations	warninos	When: 24 Oct 2019, 15:00-16:00	
75	5	12		Who: Lucy , ABI Goods 11 Tel: 0810235036 Cell: Email: Email: Bus: 0810235036	
#		 -	Ē	Page 1 of 1 (1 items) 《 ([1] > >> All	Page size: 10 🗸
customers		cases	activities	is a second s	
7	7	147		8	
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quotes	e	quipment	3rd party	ty	
. programmer				©2019 CO3 Technologies (Pty) Ltd (3.5.6.0 / 3.5.6.0)	

VIEW PIPELINE REPORT PAGE

- 1. A [] Months Pipeline report page will open.
- 2. Here you can view the enlarged *bar graph* with corresponding *key code*,
- 3. and a list of your *cases* with the pertinent *case information* displayed.



	Example	Company									Abiga	il Milne 🤤
	1 Mont	ths Pipe	line ┥	-0)							♦ 0
		70000							Cases Closed - Li Quotes Closed - Cases Distant pr Quotes Distant p	ost Lost ospect - on hold irospect - on hold		
2		50000							Cases Interested Quotes Interested Cases Meeting Quotes Meeting Cases Firstmeet	d		
		40000							Quotes Firstmee Cases Proposal Quotes Proposa Cases Negotiatin	ting or quote I or quote g		
3		20000							Quotes Negotiat Cases Quote fina Quotes Quote fin Cases Verbal Acc	ing slised alised eptance		
1		10000							CHINE AND STREET AND AND	CONTRACT.		
Ţ		0	7ct 2019	Nov 2019	e te te te	Dec 2019	Jan 2020	, ,	Cases Closed - V Quotes Closed -	Von Won		
Customer	Contact Name	10000 0 Subject	Oct 2019 Subject	Nov 2019 Value	Case State Desc	Dec 2019 Percentage	Jan 2020 Relative Value) Has Quotes	Cases Closed - V Quotes Closed - Quotes Closed - Value	Quote Relative Value	Case Date	Expected Completion Date
Customer ABC SHoe Co	Contact Name Jim Saunders	Subject	Subject Discuss new product range	Nov 2019 Value 10000.00	Case State Desc Distant prospect - on hold	Percentage 0,00	Jan 2020 Relative Value 0.00	Has Quotes No	Quotes Closed - V Quotes Closed - V Quotes Value 0.00	Quote Relative Value 0.00	Case Date 2 Oct 2019	Expected Completion Date 1 Nov 2019
Customer ABC SHoe Co	Contact Name Jim Saunders John West	Subject Discuss new product range New product range	Subject Subject Discuss new product range New product range	Nov 2019 Value 10000.00 0.00	Case State Desc Distant prospect - on hold Distant prospect - on hold	Percentage 0.00 5.00	Jan 2020 Relative Value 0.00 0.00	Has Quotes No No	Quote Quote Value 0.00	Quote Relative Value 0.00	Case Date 2 Oct 2019 2 Oct 2019	Expected Completion Date 1 Nov 2019 6 Nov 2019
Customer ABC SHoe Co Hope Works ABI Goods	Contact Name Jim Saunders John West Lucy	Subject Discuss new product range Present 2019 product range	Discuss new product range Present 2019 product range	Nov 2019 Value 10000.00 0.00	Case State Desc Distant prospect - on hold Distant prospect - on hold	Dec 2019 Percentage 0.00 5.00 5.00	Jan 2020 Relative Value 0.00 0.00	Has Quotes No No	Quote Closed - V Quotes Closed - V Quotes Closed - V Value 0.00 0.00	Quote Relative Value 0.00 0.00	Case Date 2 Oct 2019 2 Oct 2019 2 Oct 2019	Expected Completion Date 1 Nov 2019 6 Nov 2019 23 Nov 2019
Customer ABC SHoe Co Hope Works ABI Goods Bits and Bytes	Contact Name Jim Saunders John West Lucy Josh Meyers	Subject Discuss new product range New product range Client upgrading machines	Dct 2019 Subject Discuss new product range New product range Present 2019 product range Client upgrading machines	Nov 2019 Value 10000.00 0.00 0.00 35000.00	Case State Desc Distant prospect - on hold Distant prospect - on hold Distant prospect - on hold Closed - Won	Dec 2019 Percentage 0.00 5.00 5.00 100.00	Jan 2020 Relative Value 0.00 0.00 0.00 35000.00	Has Quotes No No No	Quote Claser Clored - V Quotes Clased - V Value 0.00 0.00 0.00	Quote Relative Value 0.00 0.00 0.00	Case Date 2 Oct 2019 2 Oct 2019 2 Oct 2019 2 Oct 2019 2 Oct 2019 2 Oct 2019	Expected Completion Date 1 Nov 2019 6 Nov 2019 23 Nov 2019 31 Oct 2019

- 1. *Hover anywhere* over a selected bar in the chart to display a related *information box*.
 - In this example, the bar represents *Cases Closed Won* and the amount is *7000*.

VIEW CUSTOMER FROM PIPELINE PAGE

2. Click on a *customer name* in the *Customer* column.



	l Month	ns Pipe	line									(
	7000								Cases Closed - Quotes Closed	Lost - Lost	1	
	1 contact			2					Cases Distant p Quotes Distant	prospect - on hold prospect - on hol	d	
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	5000	10	/						Cases Meeting Quotes Meeting	2		
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	- Sector			/					Cases Proposa	l or quote		
	3000	10	Oct 2019						Quotes Propos Cases Negotiat	al or quote ing		
	2001	L	Cases Closed - w	/on:70000					Quotes Negotia Cases Quote fir	ating		
	2000	0							Quotes Quote f	inalised		
	1000	10							Cases Verbal A Quotes Verbal	cceptance Acceptance		
	- 0.0								Cases Closed -	Won - Won		
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		011	2019	NOV 2019		Dec 2019	Jan 2020					
	Contact Name	Subject	Subject	Value	Case State Desc	Percentage	Jan 2020 Relative Value	Has Quotes	Quote Value	Quote Relative Value	Case Date	Expected Completion Date
BC SHoe	Contact Name Jim Saunders	Subject Discuss new product range	Subject Discuss new product range	Value 10000.00	Case State Desc Distant prospect - on hold	Percentage	Relative Value	Has Quotes No	Quote Value	Quote Relative Value	Case Date	Expected Completion Date
BC SHoe o BI Goods	Contact Name Jim Saunders Lucy	Subject Discuss new product range Present 2019 product range	Subject Discuss new product range Present 2019 product range	Value 10000.00 0.00	Case State Desc Distant prospect - on hold Distant prospect - on hold	Percentage 0.00 5.00	Relative Value 0.00	Has Quotes No	Quote Value 0.00 0.00	Quote Relative Value 0.00	Case Date 2 Oct 2019 2 Oct 2019	Expected Completion Date 1 Nov 2019 23 Nov 201
BC SHoe o BI Goods its and ytes	Contact Name Jim Saunders Lucy Josh Meyers	Subject Discuss new product range Present 2019 product range Client upgrading machines	Subject Discuss new product range Present 2019 product range Client upgrading machines	Value 10000.00 0.00 35000.00	Case State Desc Distant prospect - on hold Distant prospect - on hold Closed - Won	Percentage 0.00 5.00 100.00	3an 2020 Relative Value 0.00 0.00 35000.00	Has Quotes No No	Quote Value 0.00 0.00	Quote Relative Value 0.00 0.00	Case Date 2 Oct 2019 2 Oct 2019 24 Oct 2019	Expected Completio Date 1 Nov 2019 23 Nov 2019 31 Oct 201
BC SHoe o BI Goods its and ytes its and ytes	Contact Name Jim Saunders Lucy Josh Meyers Josh Meyers	Subject Discuss new product range Present 2019 product range Client upgrading machines	Subject Discuss new product range Present 2019 product range Client upgrading machines Client upgrading machines	Value 10000.00 0.00 35000.00	Case State Desc Distant prospect - on hold Distant prospect - on hold Closed - Won	Percentage 0.00 5.00 100.00 100.00	Jan 2020 Relative Value 0.00 35000.00 35000.00	Has Quotes No No No	Quote Value 0.00 0.00 0.00 0.00	Quote Relative Value 0.00 0.00 0.00 0.00	Case Date 2 Oct 2019 2 Oct 2019 24 Oct 2019 24 Oct 2019	Expected Completio Date 1 Nov 2019 23 Nov 2019 31 Oct 201 31 Oct 201

1. The *Customer Homepage* will open.

Refer to Introduction to the Customer Homepage for more information.

- 2. You can also view the [] Month Pipeline frame in this page.
- 3. Click on the *Back* arrow to return to the *[] Months Pipeline* page.





VIEW CASE FROM PIPELINE PAGE

- 1. In the [] Months Pipeline page,
- 2. Click on a *case* in the Case *Subject* column.



CSW	Example C	ompany									Abiga	iil Milne 幕
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		70000						-	Cases Closed - Los Quotes Closed - Lr Cases Distant pro	rt ost espect - on hold		
		60000							Quotes Distant pro Cases Interested Quotes Interested	ospect - on hold		
		40000							Quotes Meeting Cases Firstmeetin Quotes Firstmeet	ing.		
		30000						_	Cases Proposal or Quotes Proposal o Cases Negotiating	guote ar quote		
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2		10000							Quotes Verbal Acce Cases Closed - Wo Quotes Closed - V	eptance In Von		
4	ũ.,.	24 A	Oct 2019	Nov 2019		Dec 2019	Jan 2020	Ê				
Customer	Name	Subject	Subject	Value	Case State Desc	Percentage	Relative Value	Has Quotes	Quote Value	Quote Relative Value	Case Date	Expected Completion Date
ABC SHoe Co	Jim Saunders	Discuss new product range	Discuss new product range	10000.00	Distant prospect - on hold	0.00	0.00	No	0.00	0.00	2 Oct 2019	1 Nov 2019
Hope Works	John West	New product range	New product range	0.00	Distant prospect - on hold	5.00	0.00	No	0.00	0.00	2 Oct 2019	6 Nov 2019
ABI Goods	Lucy	Present 2019 product range	Present 2019 product range	0.00	Distant prospect - on hold	5.00	0.00	No	0.00	0.00	2 Oct 2019	23 Nov 2019
Bits and Bytes	Josh Meyers	Client upgrading machines	Client upgrading machines	35000.00	Closed - Won	100.00	35000.00	No	0.00	0.00	24 Oct 2019	31 Oct 2019
Bits and Bytes	Josh Meyers	Client upgrading machines	Client upgrading machines	35000.00	Closed - Won	100.00	35000.00	No	0.00	0.00	24 Oct 2019	31 Oct 2019
Page 1 of 1 (5 it	tems) 🔄 [1] 🕅	A (A)										Page size: 10 🔗

1. The *Save Case* page will open.

Refer to Introduction to Cases for more information.

Either,

- 2. Click on the *Customer icon* to return to the Customer Dashboard (Home page),
- 3. or click on the *Back* button,
- 4. or the *left arrow* to return to the previous page.





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