

CRM BASICS

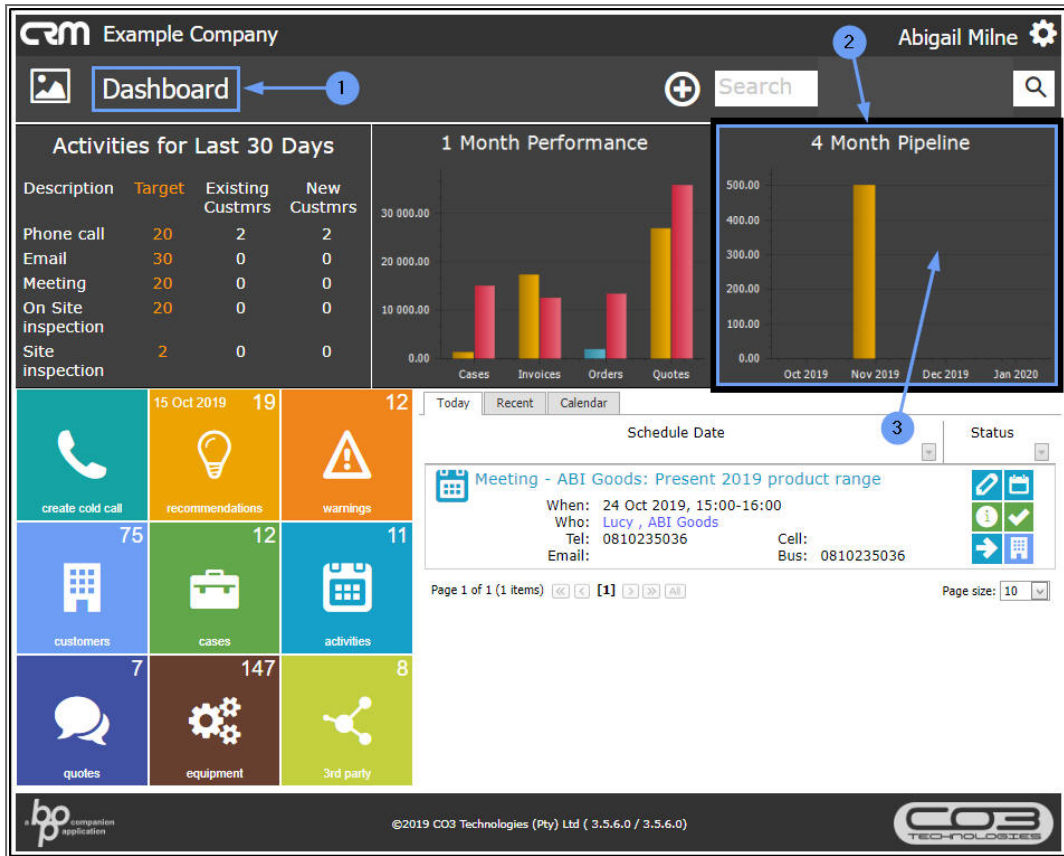
3 MONTH PIPELINE SUMMARY

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 con-figured as per your company requirements. VAT is not displayed in the pipeline.

Access: Webpage - [http://\[servername\]:\[portno\]/BPOCRM/User.aspx](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 3 months by default, but can be configured as per your company requirements. In this example, the pipeline months have been set to **4**.
3. Click anywhere in this frame.



VIEW PIPELINE REPORT PAGE

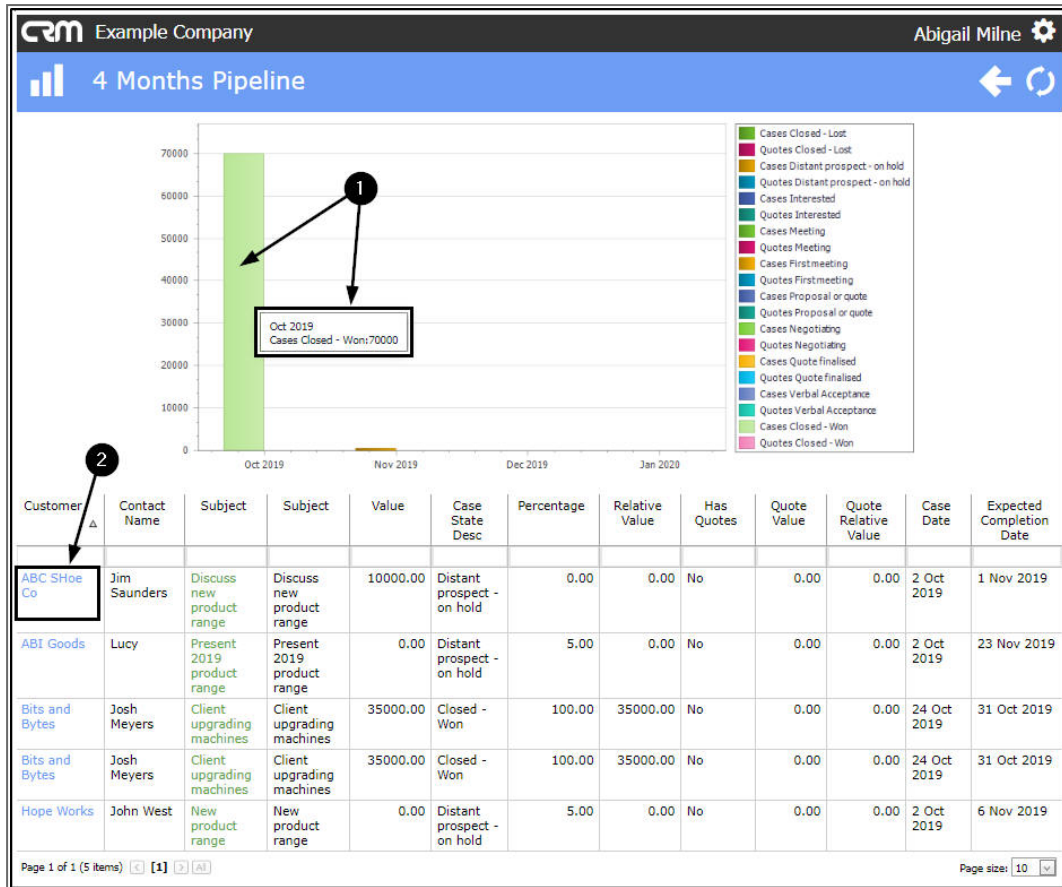
1. A [] *Months Pipeline* report page will open.
2. Here you can view the enlarged **bar graph** with corresponding **key code**,
3. and a list of your **cases** with the pertinent **case information** displayed.



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.



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.

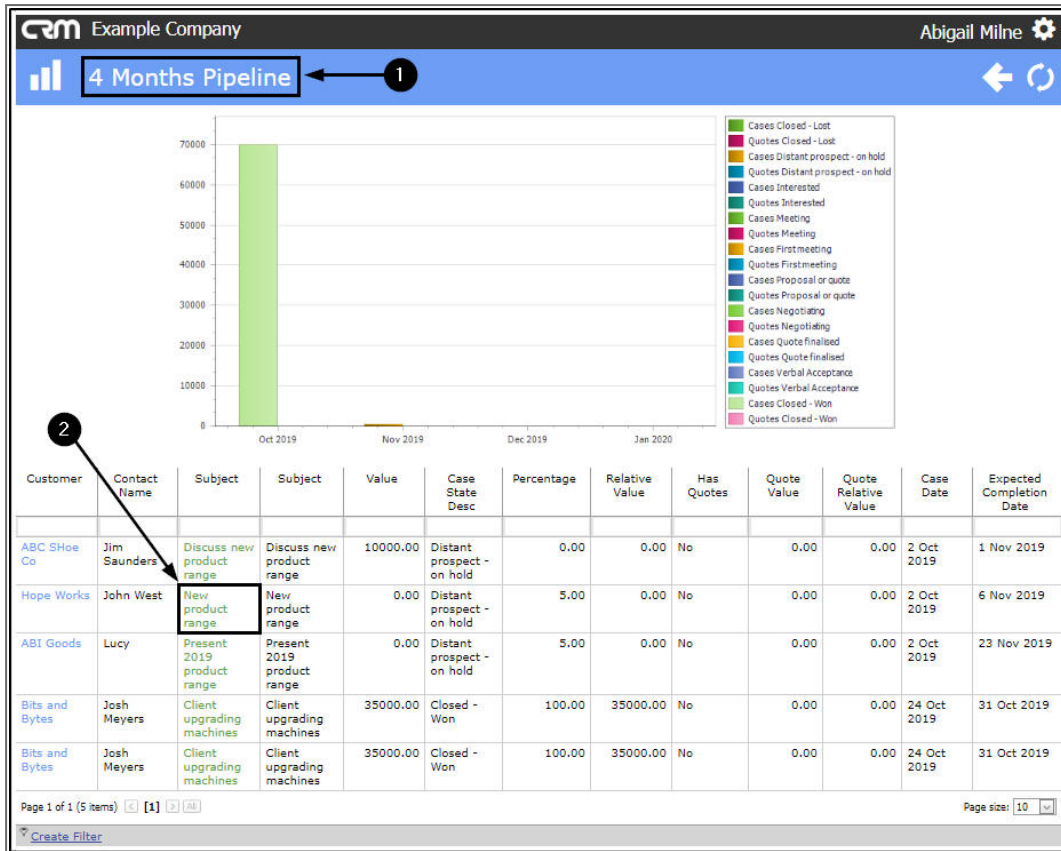
The screenshot shows a CRM dashboard for 'ABC SHoe Co'. At the top, there's a navigation bar with the company name and a search bar. Below this, the dashboard is divided into several sections:

- Activities for Last 30 Days:** A table with columns for Description, Target, Existing Custmrs, and New Custmrs.

Description	Target	Existing Custmrs	New Custmrs
Phone call	20	2	2
Email	30	0	0
Meeting	20	0	0
On Site inspection	20	0	0
Site inspection	2	0	0
- 1 Month Performance:** A bar chart showing performance for Cases, Invoices, Orders, and Quotes. The Y-axis ranges from 0.00 to 30,000.00.
- 4 Month Pipeline:** A bar chart showing pipeline values for Oct 2019, Nov 2019, Dec 2019, and Jan 2020. The Y-axis ranges from 0.00 to 500.00.
- Navigation Grid:** A grid of 12 icons for various CRM functions: create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files.
- Customer Details:** A section for 'ABC SHoe Co - ABCXYZ123' showing a profile picture (a question mark), trading name, registered name, description, VAT No (9876543210), rank (Gold), website (http://), and phone.
- 12 Months Sales History:** A line chart showing sales history from January 2018 to January 2019. The Y-axis ranges from 0 to 0.5. The legend indicates Contract Income (yellow) and Sales Revenue (blue).

VIEW CASE FROM PIPELINE PAGE

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



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.

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The page title is 'Save Case'. The main content area displays case details: Customer (Hope Works), Contact (John West), Salesman (Abigail Milne), and Subject (New product range). It also shows 'Value' (0.0000), 'Case Type' (New Deal), 'Case Date' (2 Oct 2019), and 'Expected Completion' (6 Nov 2019). There is an 'Attachments' section with a 'Browse...' button. Below this is a 'Related Customers' section showing 'Hope Works - HOP001'. The 'Case State' is 'Distant prospect - on hold (5%)' with a 'Percentage' of 5%. The left sidebar contains expandable sections: Case, Quote, Case History, Activities, Quotes, and Case Changes. A 'Save' button is at the bottom center. Annotations: 1 points to the 'Save Case' button; 2 points to the 'Browse...' button; 3 points to the navigation icons (back, list, save); 4 points to the browser's back button.

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