CRM BASICS

WARNINGS

Warnings are notifications of **overdue** activities, that can be directly actioned from the Warnings page using the Activity Action buttons.

A full list of warnings for all Customers can be accessed from the Homepage as set out below.

Client-specific warnings can be accessed from the from the Customer Homepage.

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

ACCESS WARNINGS FROM HOME PAGE

1. In the ***Dashboard*** (Home page),
2. Click on the ***Warnings*** tile.
3. **Note**: The number in the top right of this tile indicates how many warnings are pending in total for all customers.

WARNINGS PAGE – ALL CUSTOMERS

1. The ***Warnings*** page will open.
2. Here you can view a list of all the warnings, for all customers - where you have activities pending.

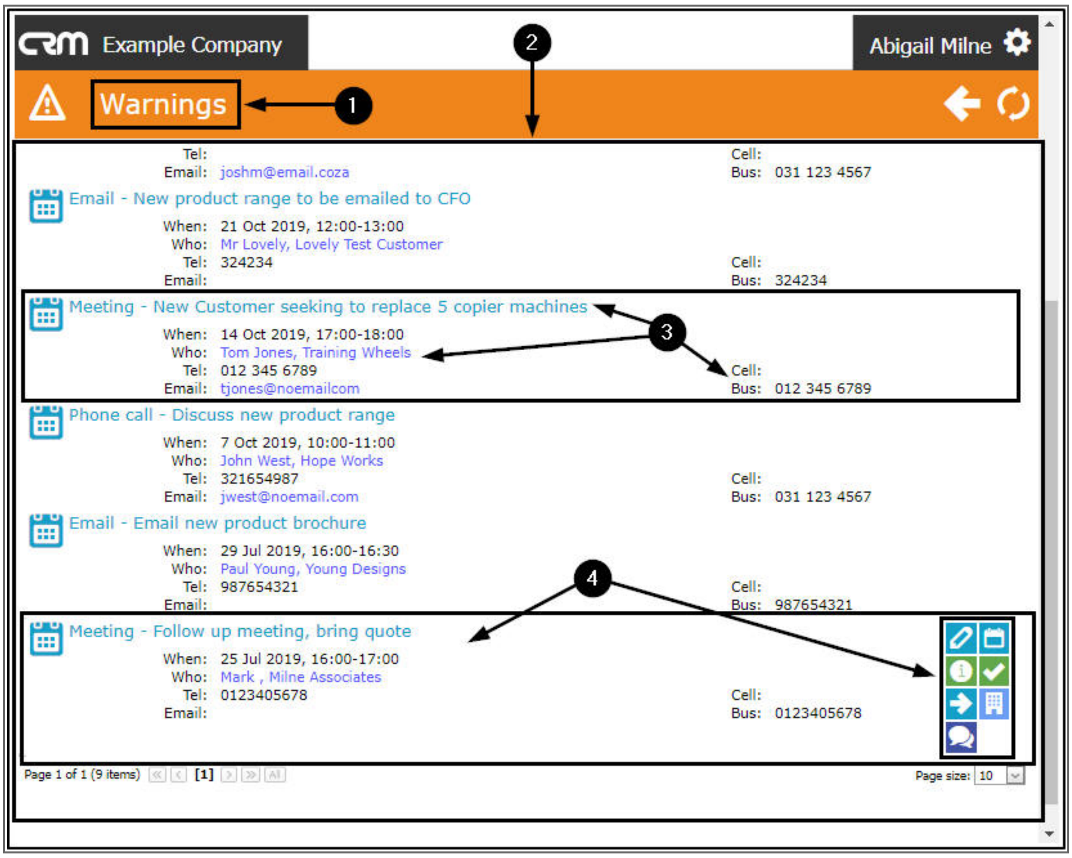
LIST OF ACTIVITIES PENDING

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:

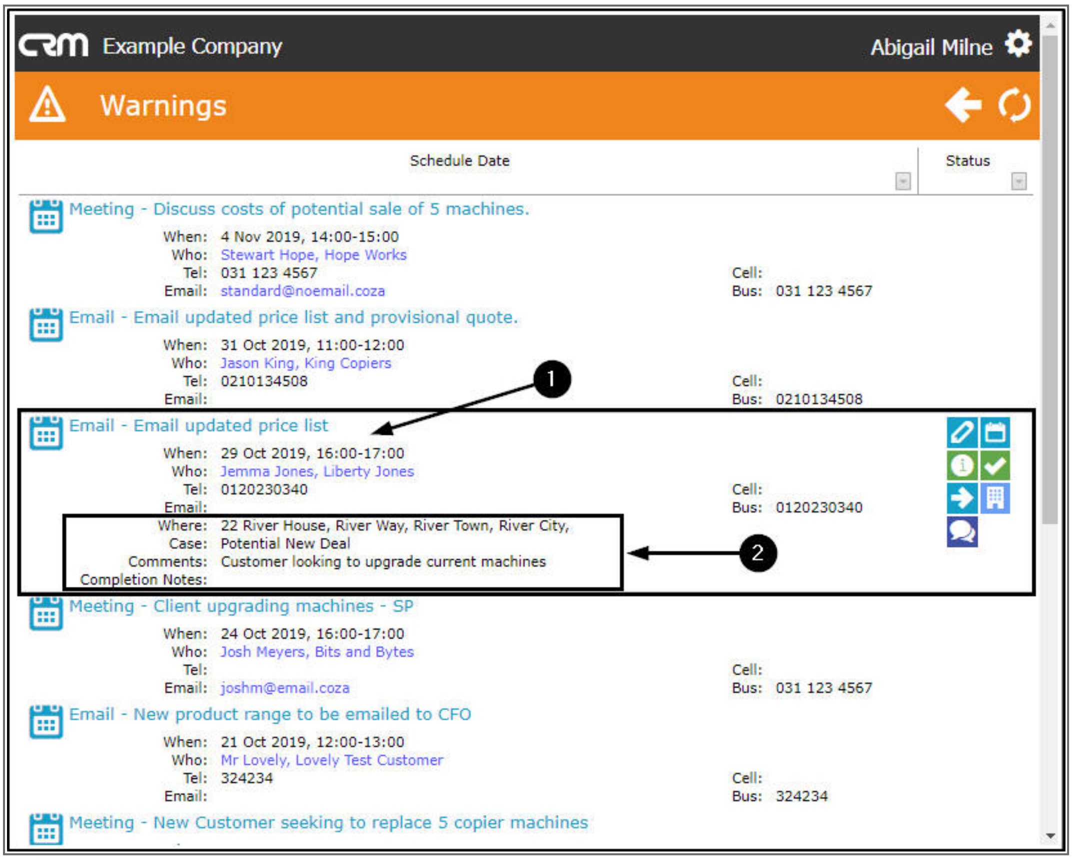
ACTIVITY ACTION BUTTONS

4. Hover over any activity to reveal the Activity ***Action 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**
   - **New Quote**



VIEW ACTIVITY SUMMARY

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



SELECT SCHEDULE DATE

You can select / change the ***Schedule Date*** parameters.

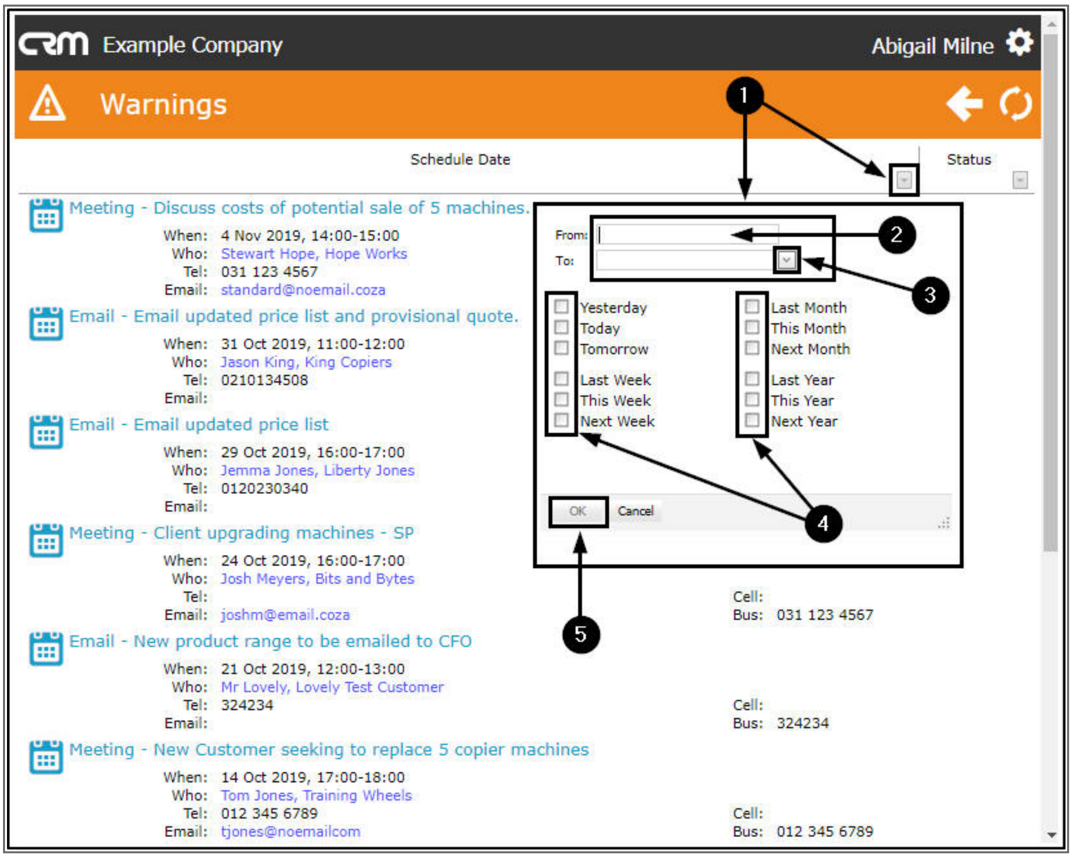
1. Click on the ***drop-down arrow*** in the ***Schedule Date*** frame to display the Select Schedule screen.

   Either

2. ***Type in*** the date parameters in the ***From*** and ***To*** fields,

   Or

3. Click on the ***drop-down arrows*** in the From and To fields and use the ***calendar function*** to select the dates.
4. Alternatively, select the ***check boxes*** that correlate to the time periods that you wish to view. For example, you could select ***This Week*** and ***Last Week***.
5. When you are happy with your selections, click on ***OK***.



1. The screen will ***refresh*** to display only the warnings in the selected date parameters.

SELECT STATUS

You can also select to view the Warnings that are in a particular ***Status***.

2. Click on the ***drop-down arrow*** in the ***Status*** frame to display the Select Schedule screen.

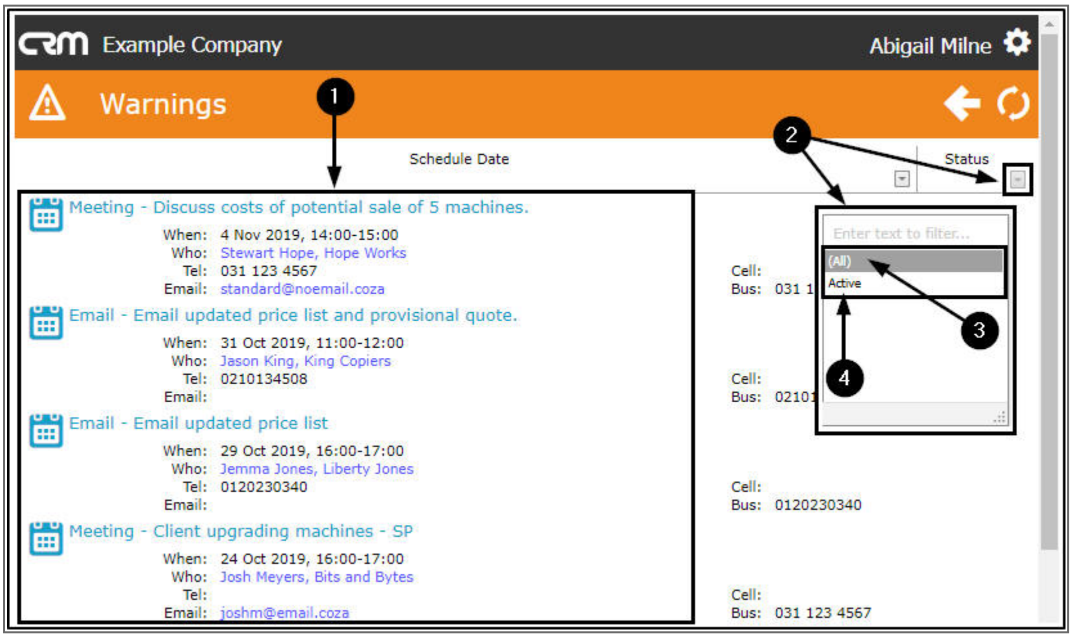
   Either

3. Select ***All*** (to view all the warnings pending),

   Or

4. Select ***Active*** (to view only the Active warnings).

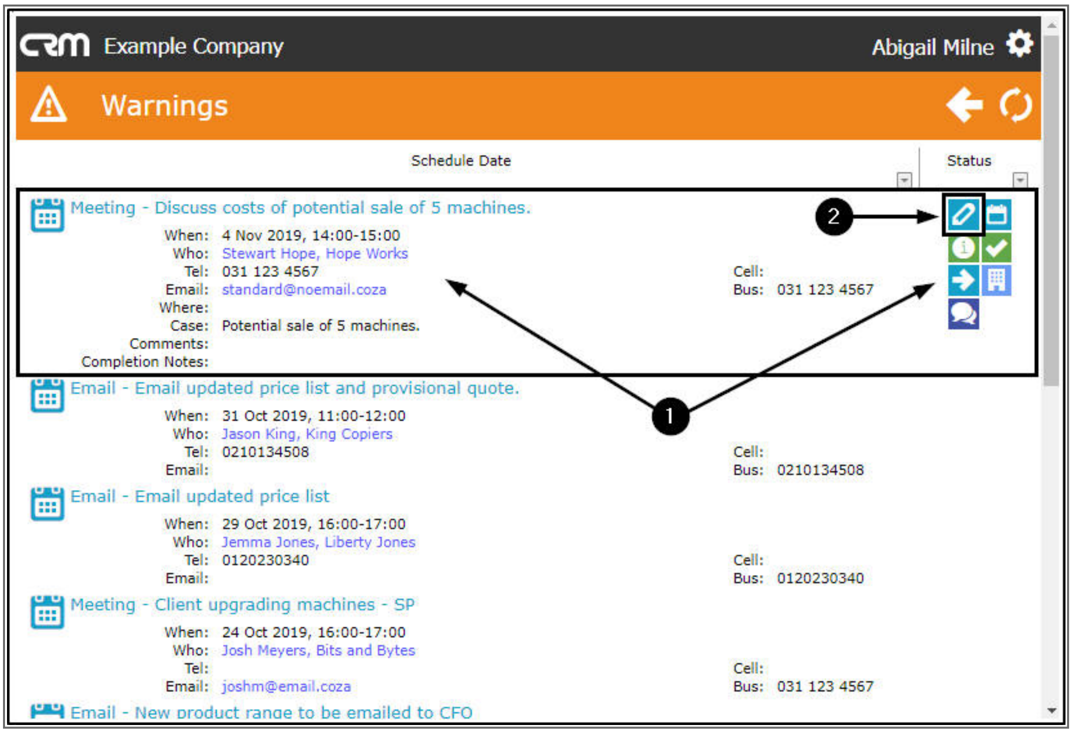
   As you click on your choice, the page will ***refresh*** to display the results of your selection.



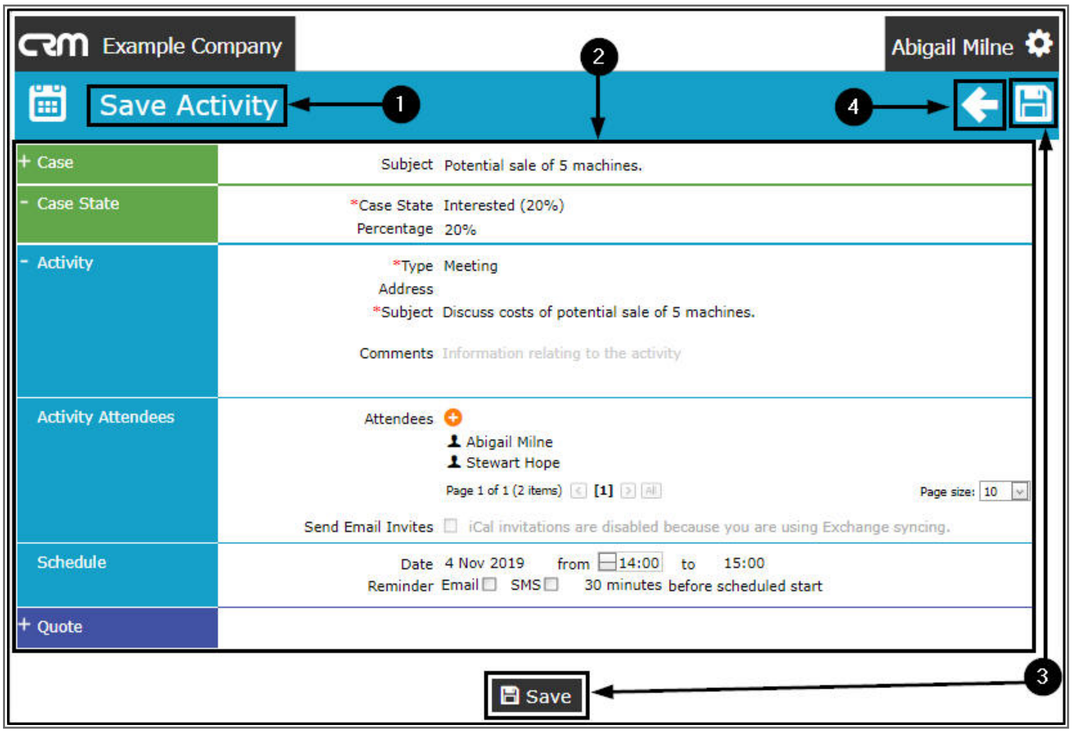
ACTIVITY ACTION BUTTONS PROCESSING

VIEW/EDIT THIS ACTIVITY

- Hover over an activity, to reveal the Activity ***Action buttons***.
- Click on the ***View/Edit this Activity*** button.

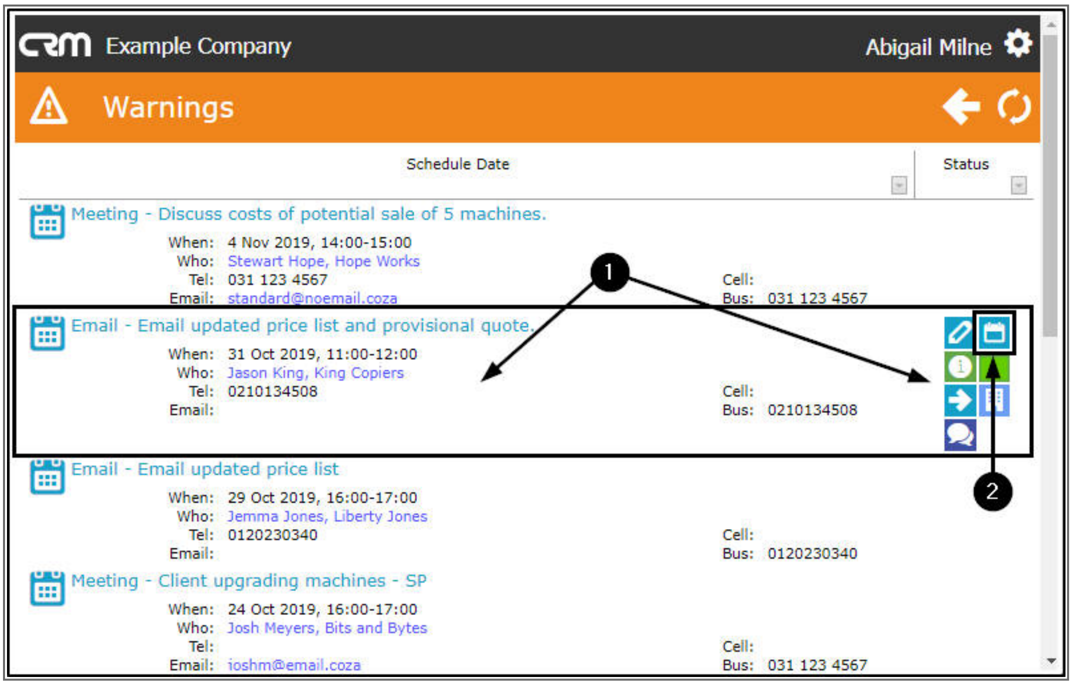


1. The ***Save Activity*** page will open.
2. View and/or Update the Activity details as required.
    - For more information regarding this page refer to View/Edit an Activity.
3. Click on ***Save*** to keep your changes,
4. or the ***Back*** button to return to the Warnings page.

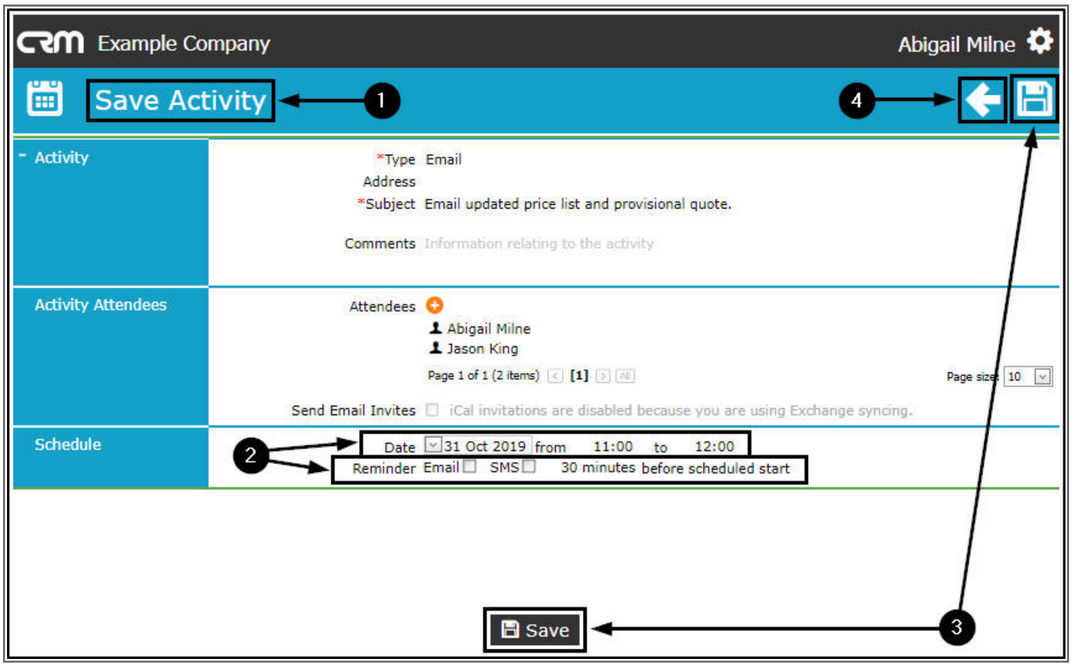


RESCHEDULE ACTIVITY

- In the Warnings page, hover over an activity, to reveal the ***Action buttons***.
- Click on the ***Reschedule this Activity*** icon

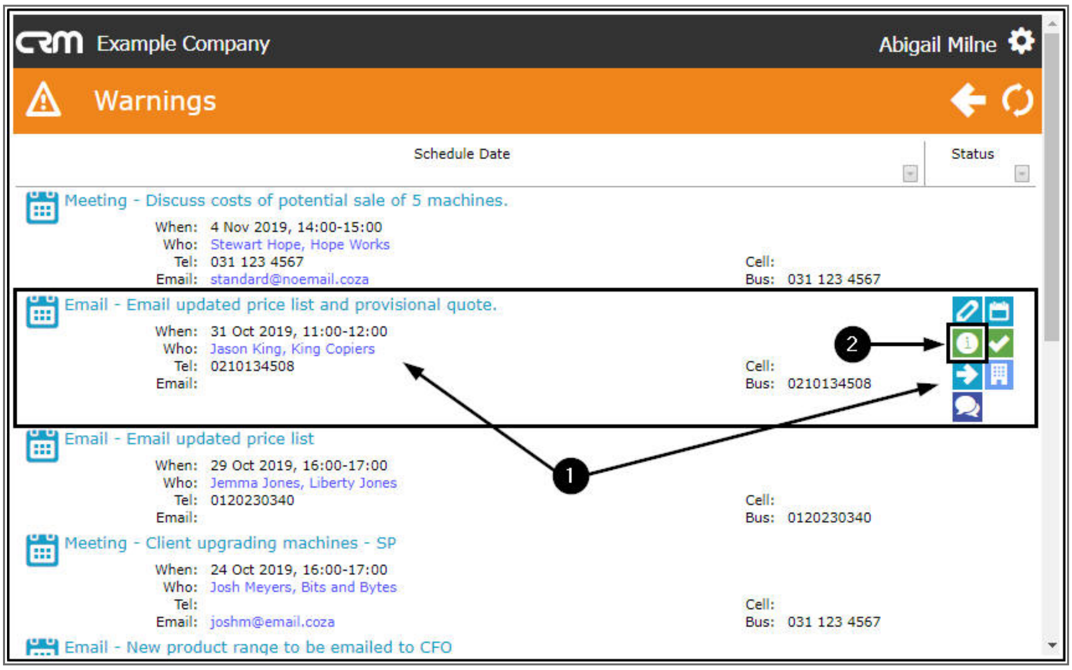


1. The ***Save Activity*** page will open.
2. Reset the ***Activity Schedule Date*** and ***Reminder*** details, as required.
    - For more information regarding this page refer to Scheduling.
3. Click on ***Save*** to keep any changes made or
4. Click on ***Back*** to return to the ***Warnings*** listing page.

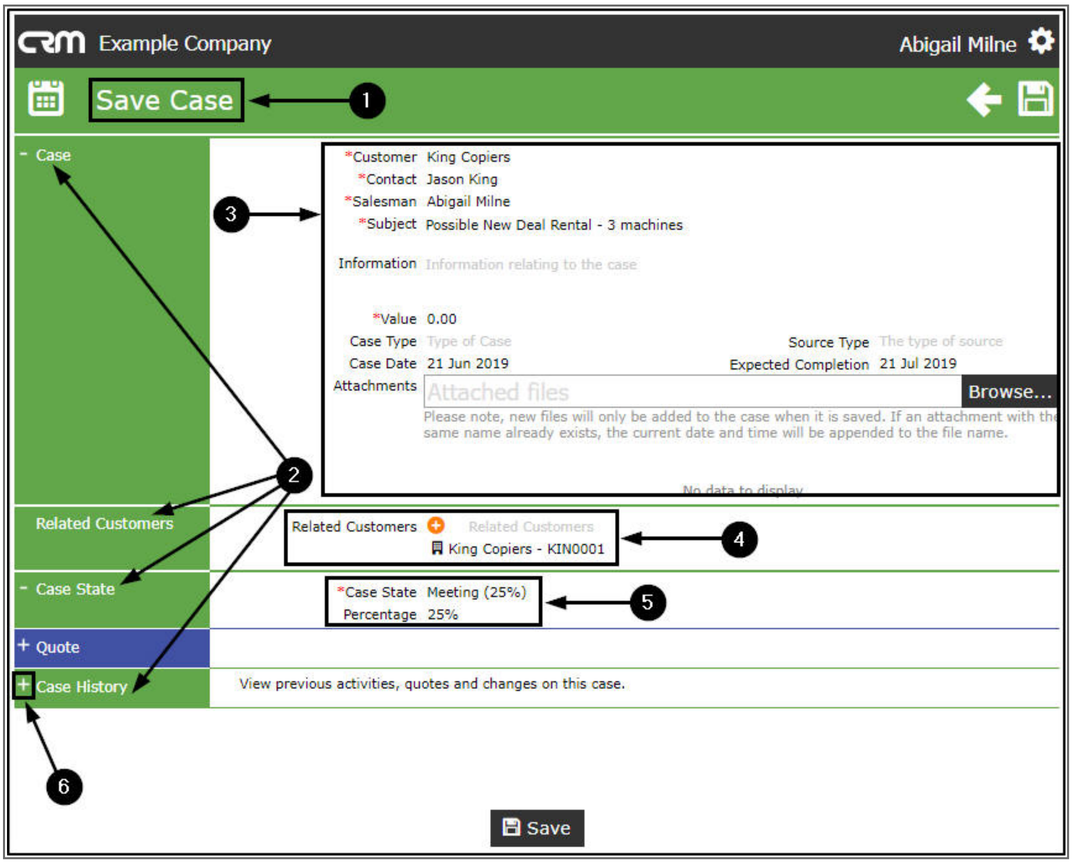


VIEW CASE INFO AND HISTORY

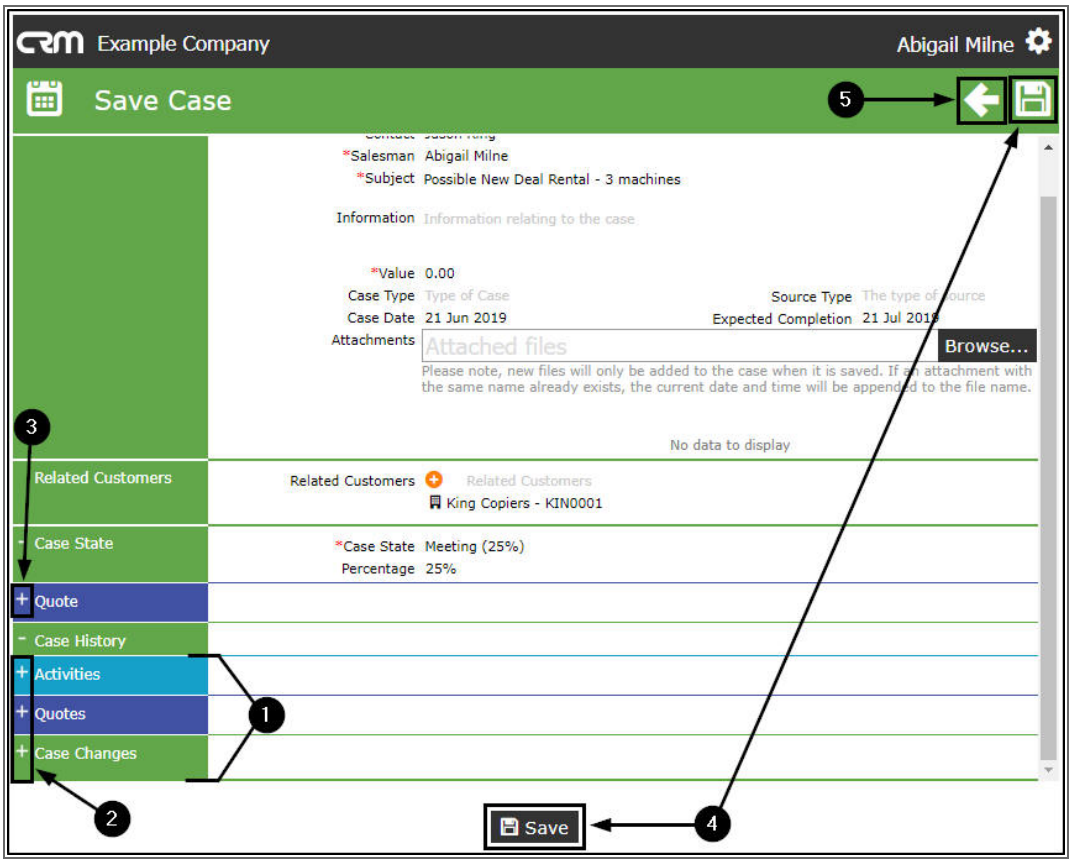
- In the Warnings page, hover over an activity, to reveal the ***Action buttons***.
- Click on the ***View Case Info and History*** icon



1. The ***Save Case*** page will open.
2. The following frames will be auto-expanded:
3. **Case**
    - You will note that the case details are auto populated. You can edit all these details, except for the Customer, Salesman, Subject and Information fields.
4. **Related Customers**
    - You will note that the Customer Name will be auto populated, you can add more Related Customers, if required.
5. **Case State**
    - The Case State and Percentage will be auto populated. You can edit the Case State, if required (which will update the Percentage).
6. **Case History**
    - Here you can expand the ***Case History*** frame.

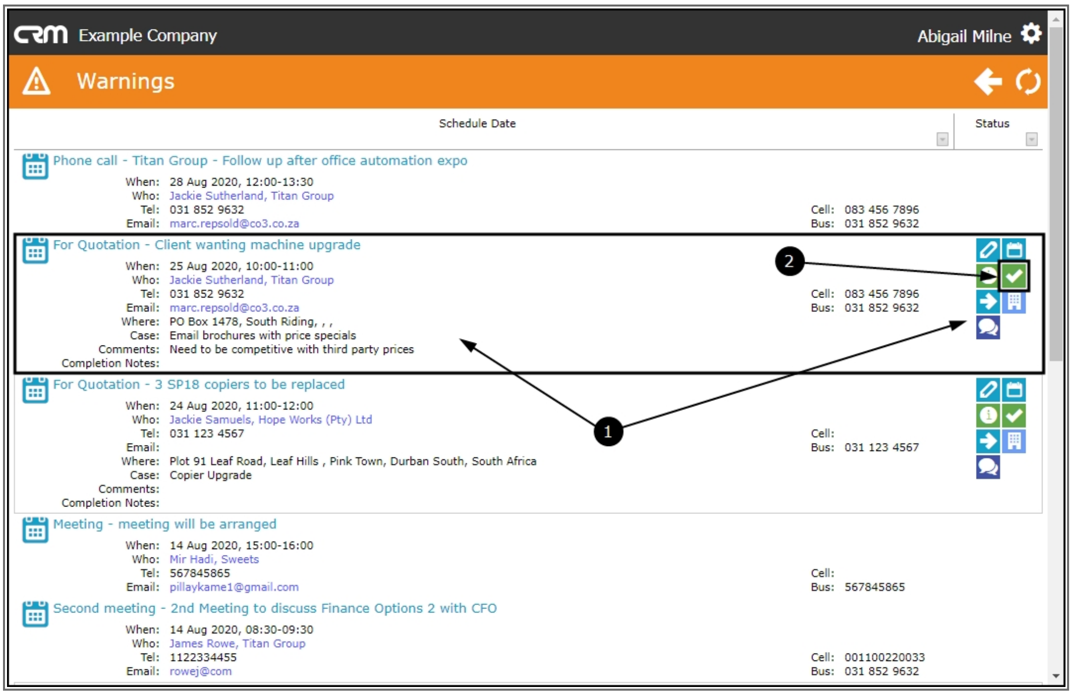


1. The 3 Case History sub-frames can now be viewed.
2. Expand these sub-sections to:
   i. view an historical list of ***Activities*** and if an Activity is open it can be actioned using the Action buttons,
   ii. view and edit linked ***Quotes*** and
   iii. view any ***Case Changes***.
3. In this page, you can create a ***new Quote*** linked to this Case. Refer to Add a new Quote linked to this Case for more information.
4. Click on ***Save*** to keep any changes made or
5. Click on ***Back*** to return to the ***Warnings*** listing page.

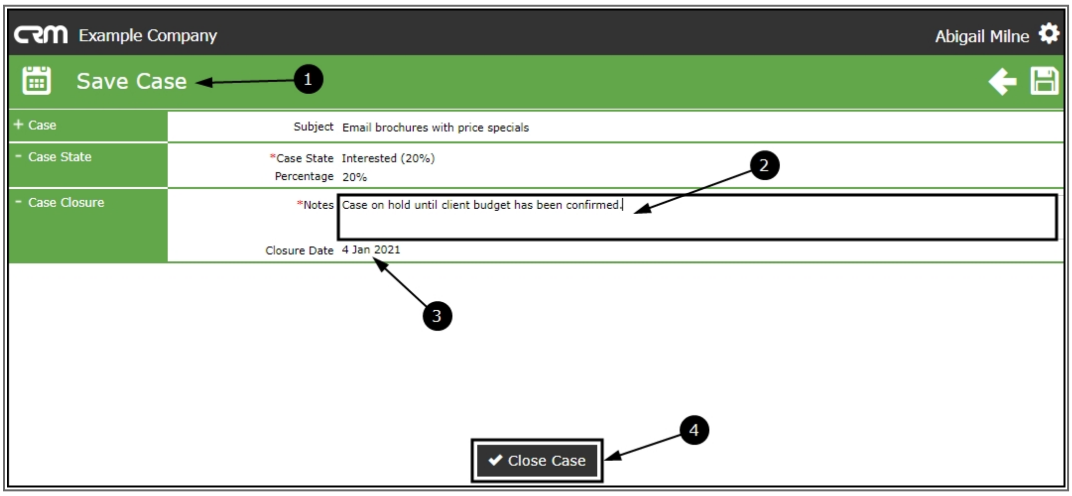


CLOSE THIS CASE

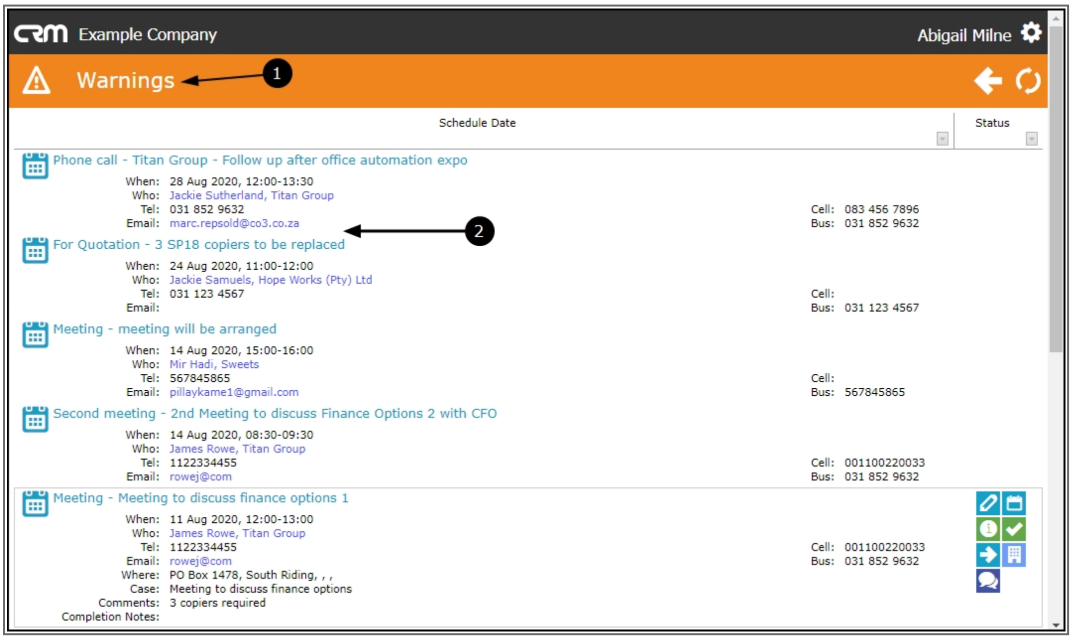
- In the Warnings page, hover over an activity, to reveal the ***Action buttons***.
- Click on the ***Close this Case*** icon.



- The ***Save Case*** page will open.
- Type in the completion ***Notes.*** (This is mandatory.)
- The Case ***Closure Date*** will be auto populated.
- Click on ***Close Case.***
  - **Note:** This will close the Case and any related Activities, this action <u>cannot</u> be undone.



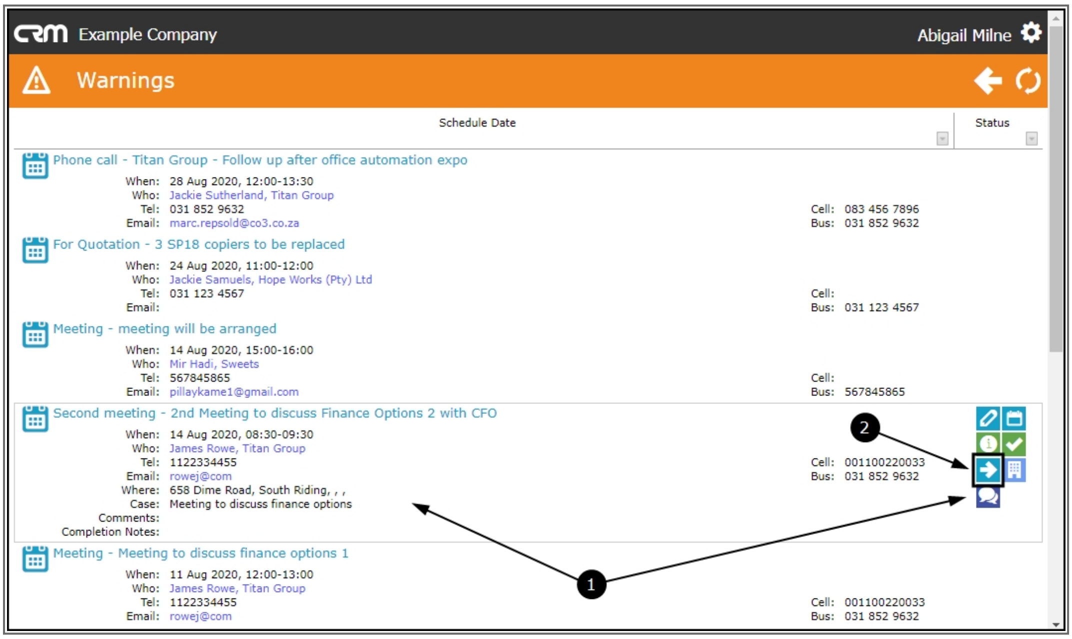
1. You will return to the ***Warnings*** page.
2. The Warning (Case) that you selected to close, will be removed from the list.



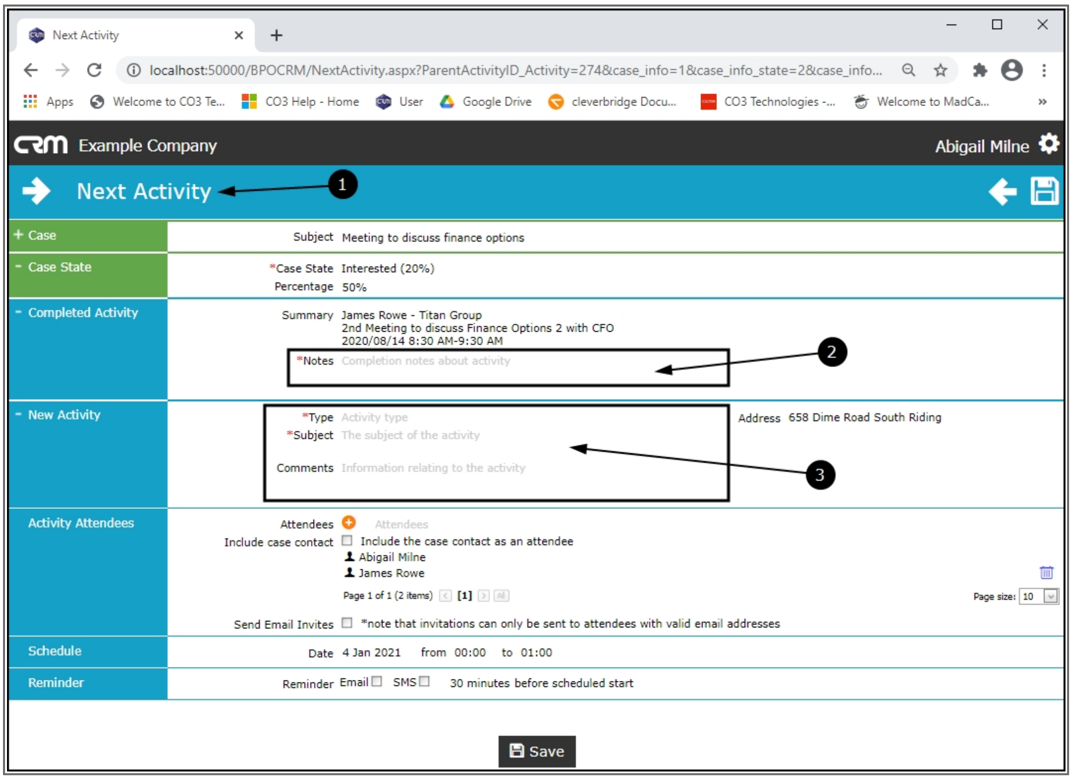
NEXT ACTION

This option will ***complete*** the current activity and create a ***new*** activity.

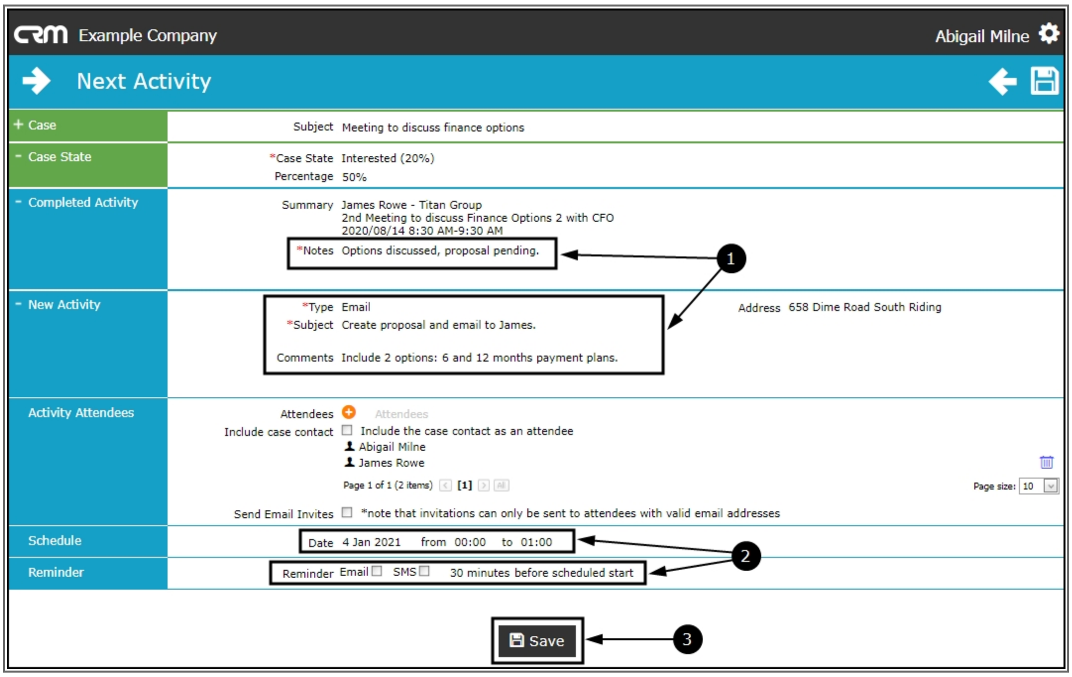
- In the ***Warnings*** page, hover over an activity, to reveal the ***Action buttons***.
- Click on the ***Next Action*** icon.



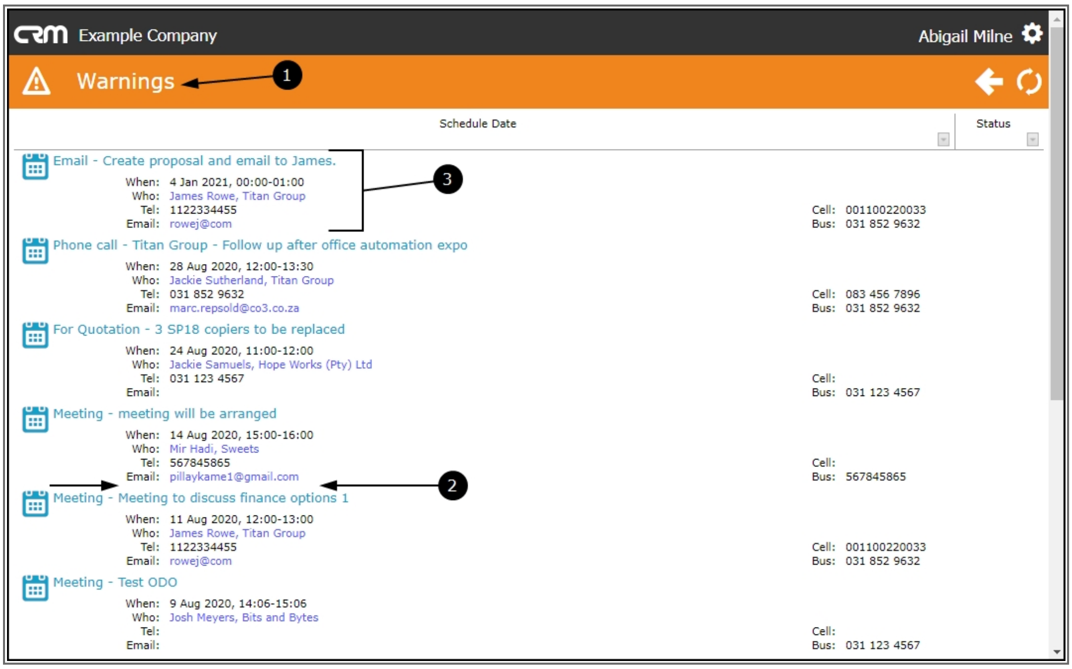
1. The ***Next Activity*** page will open.
2. Ensure that you update the ***Completed Activity*** **Notes*, this is mandatory.
3. Fill in the information for the ***New Activity***.



1. When you have added the ***Notes*** and ***New Activity*** information,
2. You can ***Schedule*** the date of the New Activity and set a ***Reminder*** at this point, if you wish.
   - **Note**: If you do not set the date then it will auto populate with the current date, and the time will be set to a 1 hour time slot ahead of the current time.
3. When you have entered the required information, click on ***Save***.

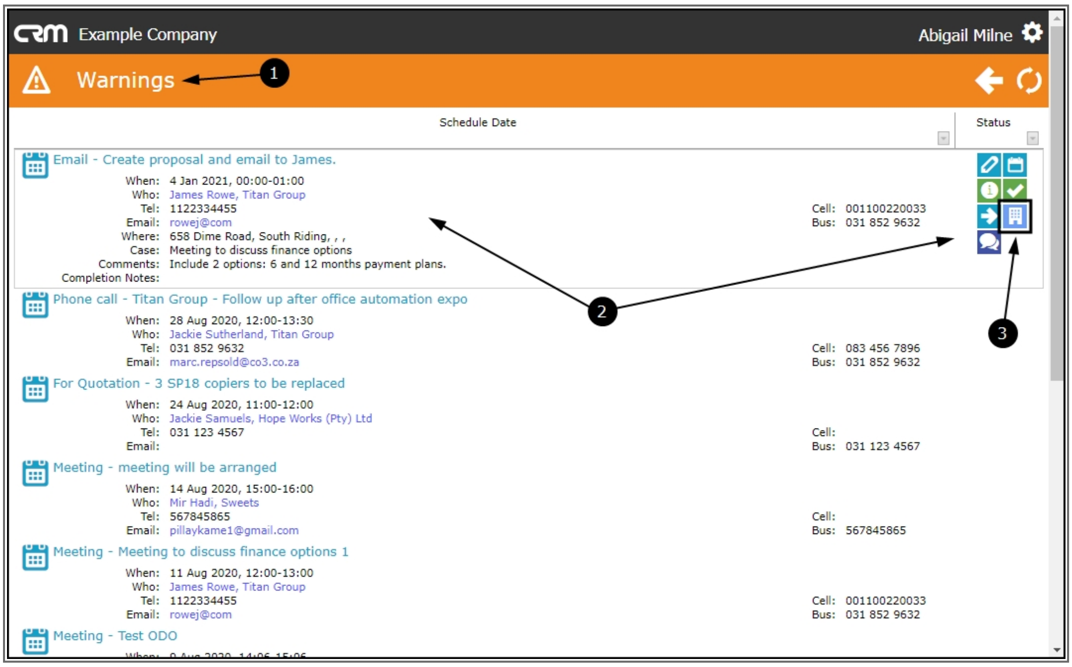


1. You will return to the ***Warnings*** page.
2. The originally selected Warning will be removed from the list.
3. If you did not set the date and time of the ***New Activity***, it will present in the Warnings list, as in this image.
   - If you set an alternative date, ahead of the current date, it will not appear until the Activity moves into the Warning date/time parameters.



VIEW CUSTOMER

- In the ***Warnings*** page, hover over an activity, to reveal the ***Action buttons***.
- Click on the ***View Customer*** icon.



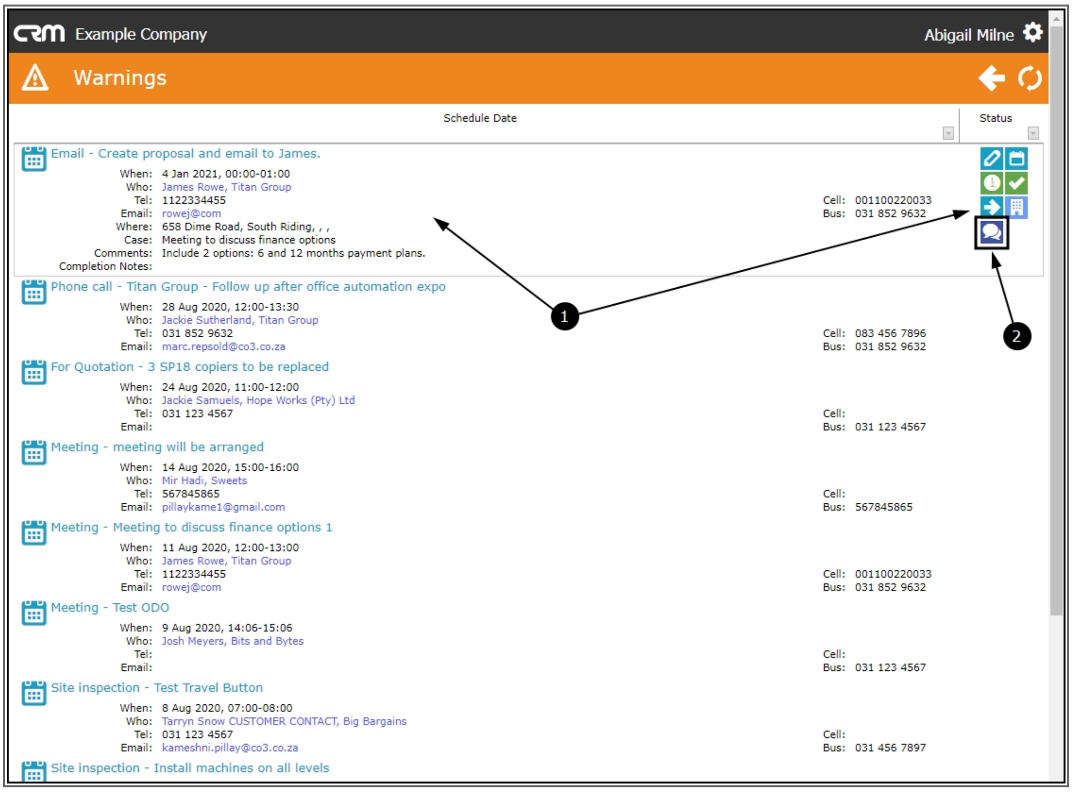
1. The ***Customer*** page will open.
2. From here, you can access the Customer ***Dashboard Tiles***,
3. the Customer ***Information Tiles*** and the
4. Customer ***Action buttons***.

   - Use your browser's ***back*** button to return to the Warning List / Close the 'View Warnings' form.

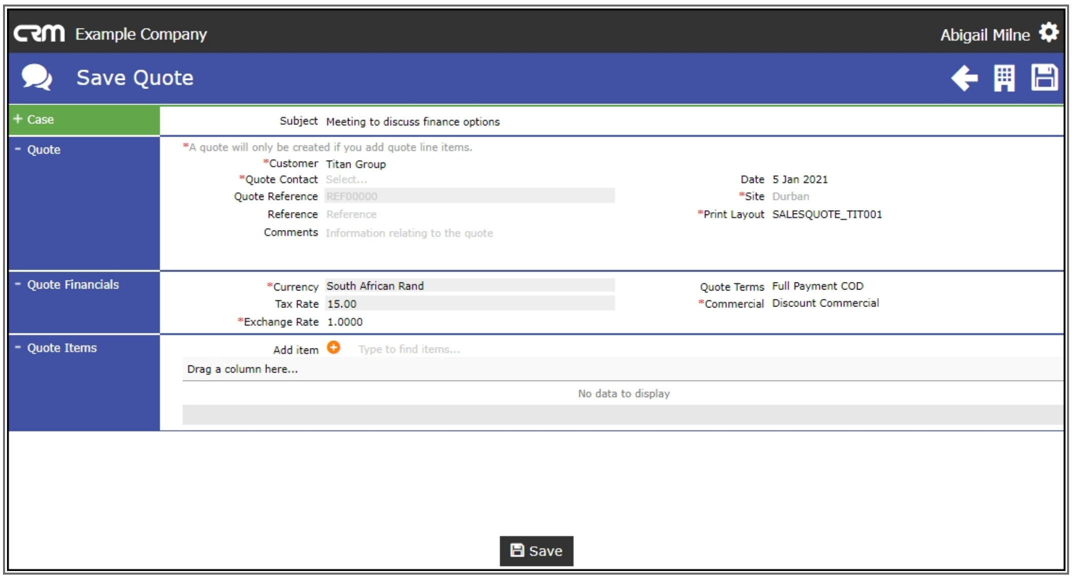
NEW QUOTE

You can create a ***new quote*** from the ***Warnings*** page.

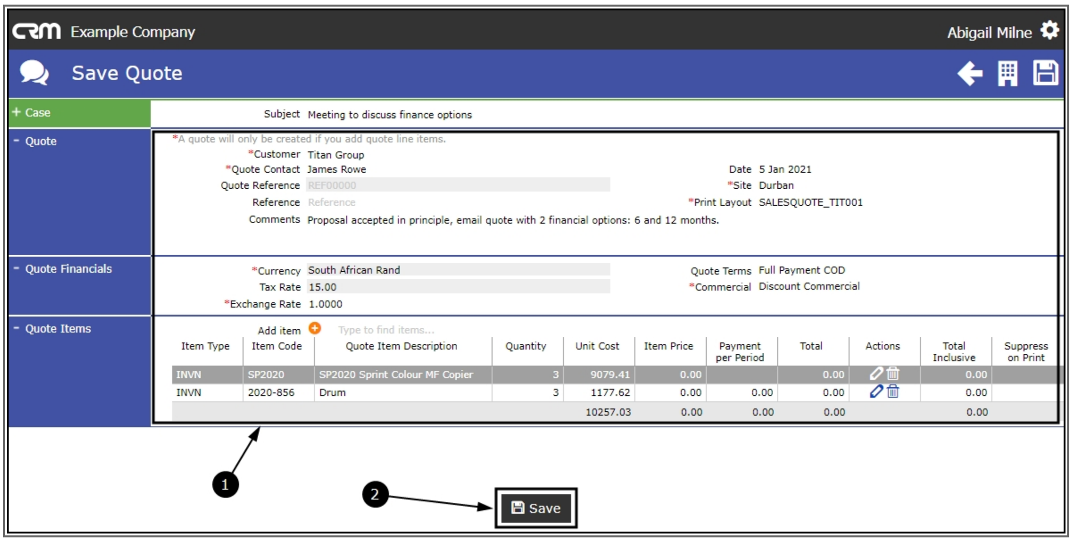
- In the ***Warnings*** page, hover over an activity, to reveal the ***Action buttons***.
- Click on the ***Quote*** icon.



- The ***Save Quote*** page will open.
- Add the quote details as required, by referring to Add a New Quote.
    - **Note**: A quote will only be created if you add quote ***line items***.



1. When you have added the required quote details,
2. click on ***Save***.

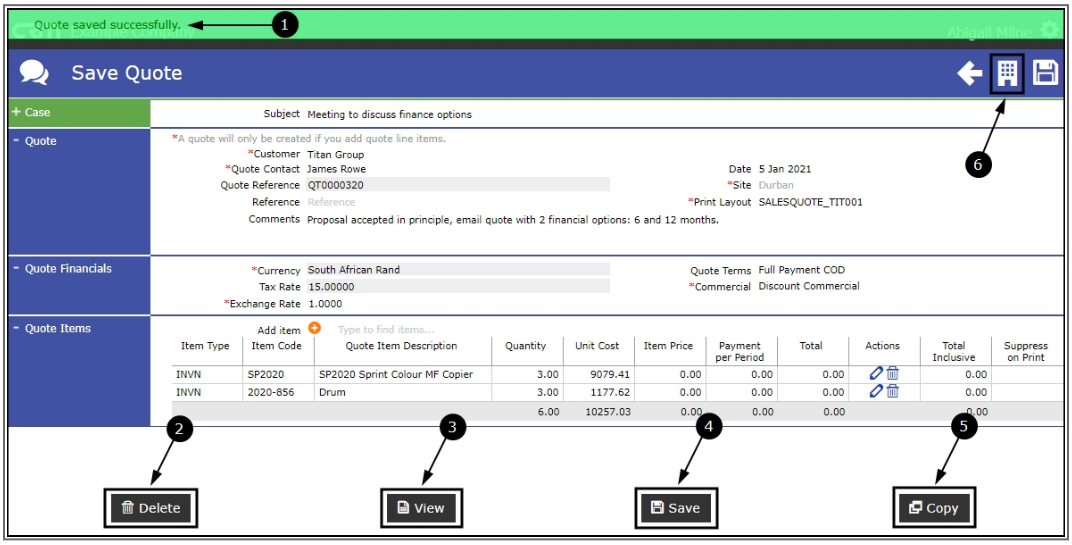


1. A ***Quote saved successfully*** message box will pop up.

You now have the option to:

2. **Delete**
3. View
4. **Save** and

5. Copy this new quote.
6. To return to the Warnings page, first select the ***Back to Customer page*** icon. In the opened Customer Home page, select the ***Warnings*** tile.



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