

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

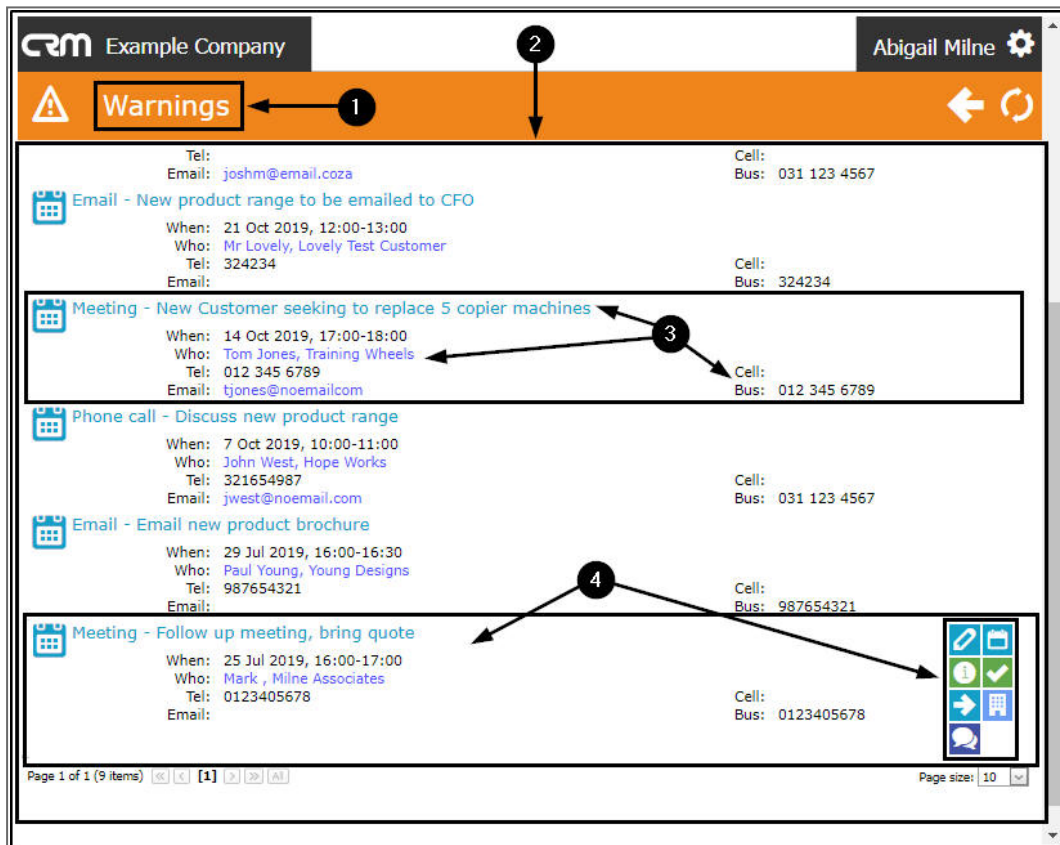
3. Each warning lists:
 - The activity **subject**
 - **When** the activity was scheduled for
 - **Who** the activity was scheduled with
 - **Contact details** for the activity:

- Tel:
- Email:
- Cell:
- Business No:

ACTIVITY ACTION BUTTONS

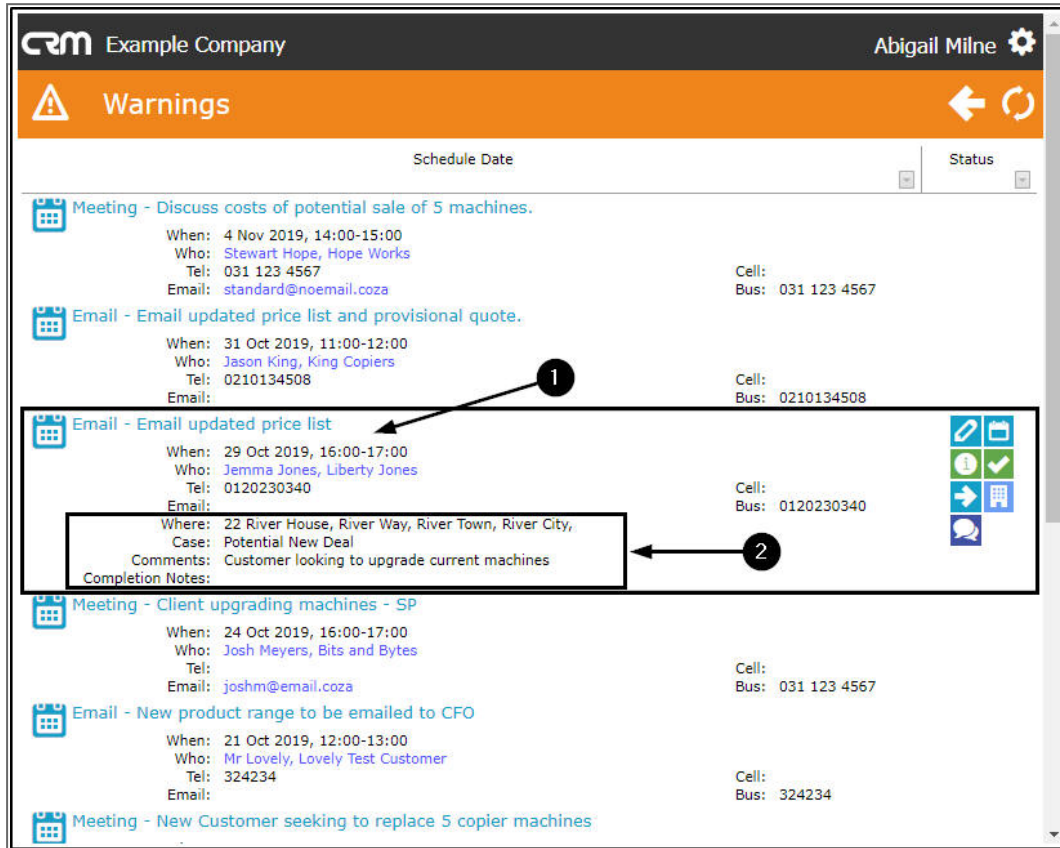
4. Hover over any activity to reveal the Activity **Action Buttons**:

- **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.

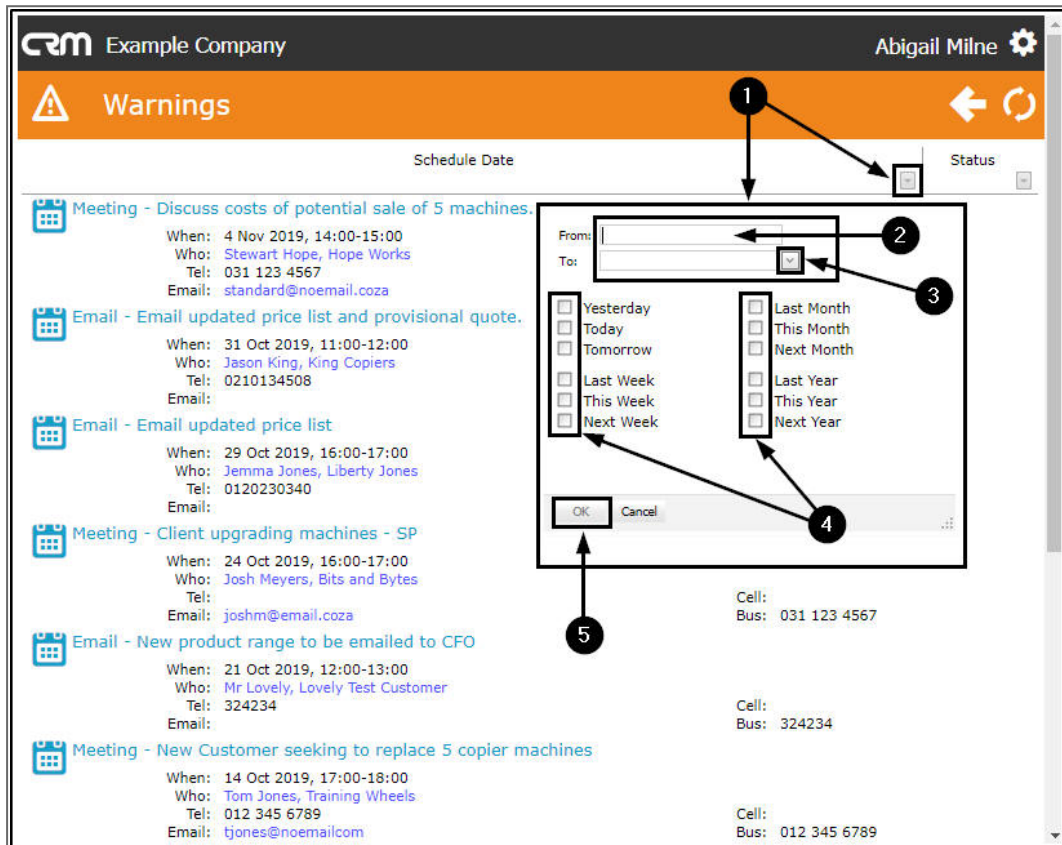
1. Click on the **drop-down arrow** in the **Schedule Date** frame to display the Select Schedule screen.

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**.

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

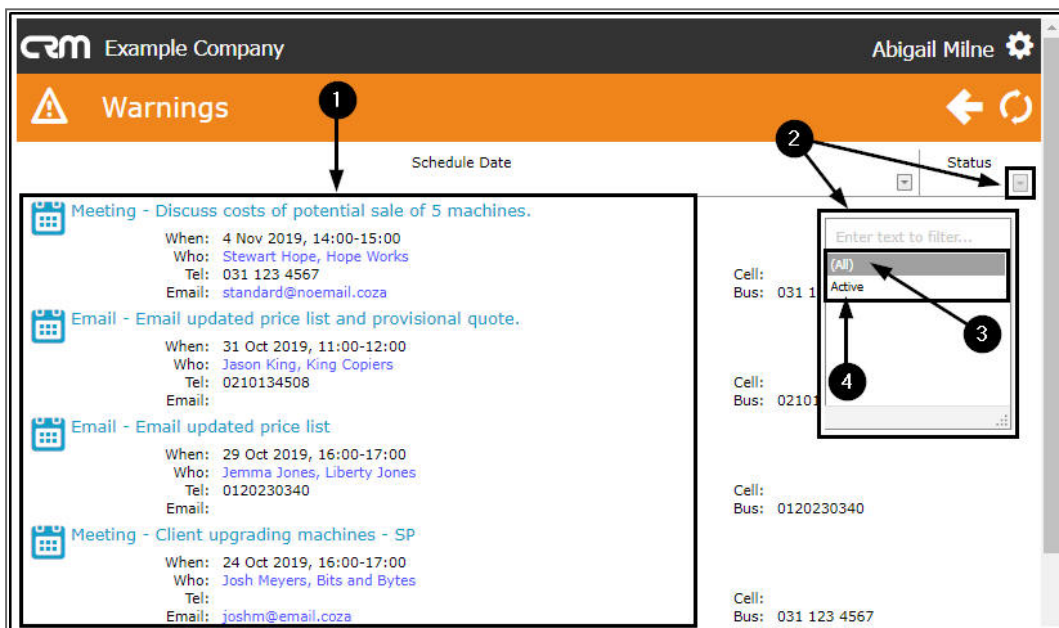
Either

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

Or

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

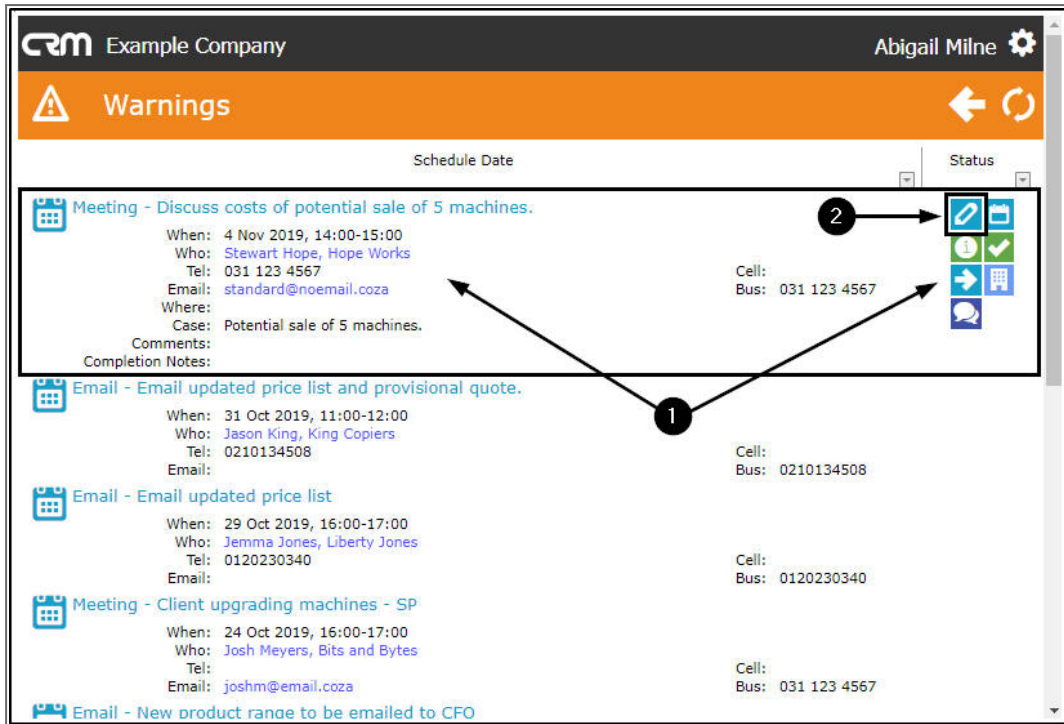
As you click on your choice, the page will **refresh** to display the results of your selection.



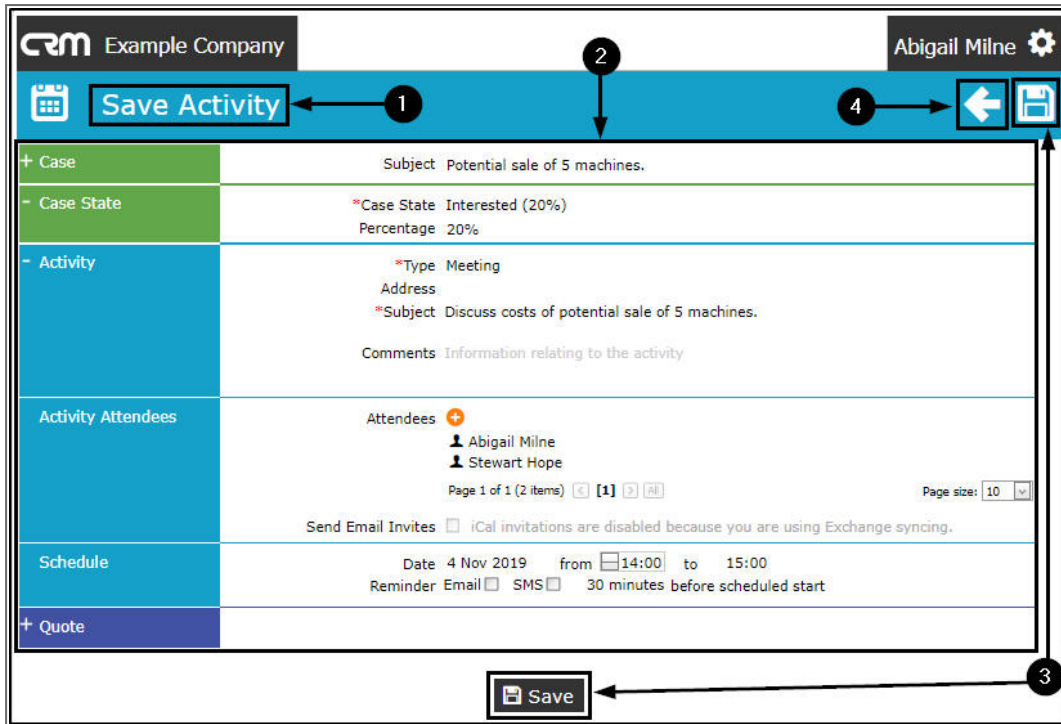
ACTIVITY ACTION BUTTONS PROCESSING

VIEW/EDIT THIS ACTIVITY

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

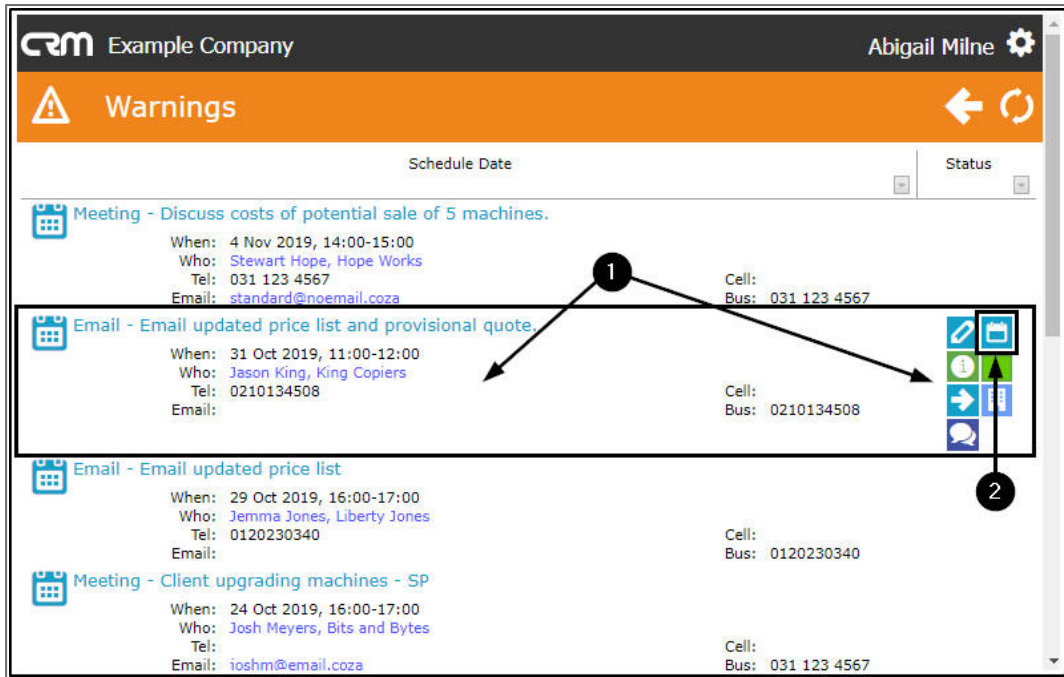


1. The **Save Activity** page will open.
2. View and/or Update the Activity details as required.
 - For more information regarding this page refer to **View/Edit an Activity**.
3. Click on **Save** to keep your changes,
4. or the **Back** button to return to the Warnings page.

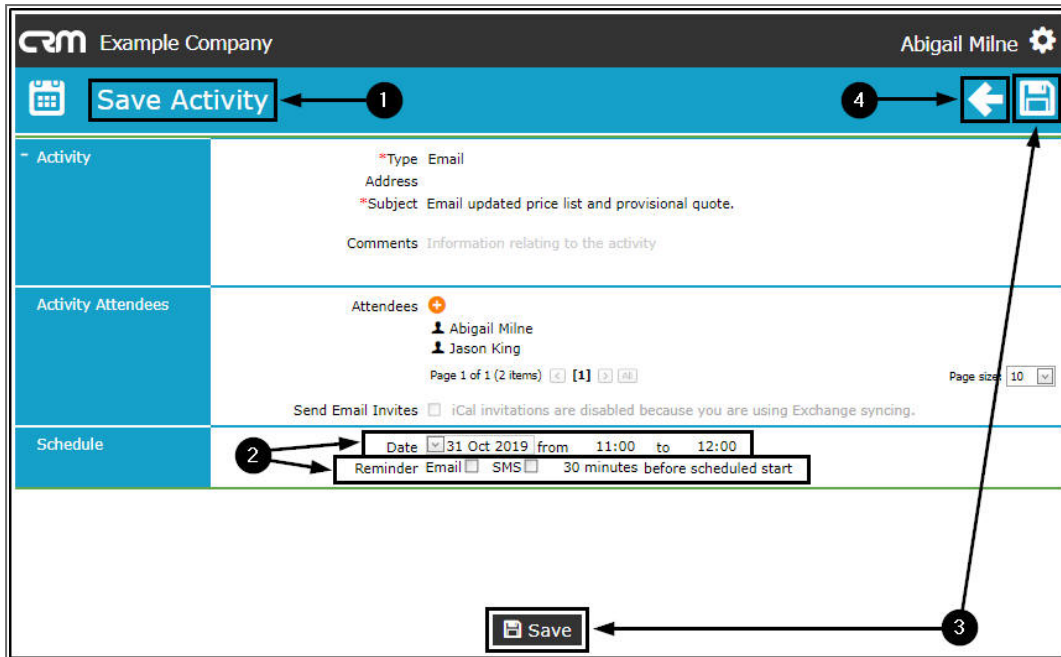


RESCHEDULE ACTIVITY

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

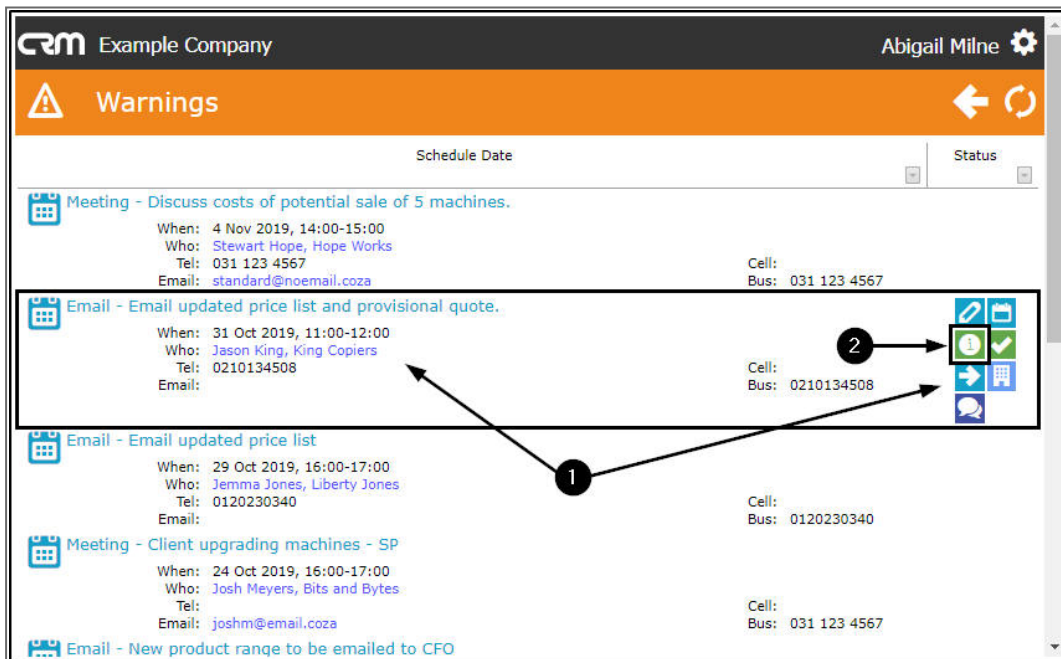


1. The **Save Activity** page will open.
2. Reset the **Activity Schedule Date** and **Reminder** details, as required.
 - For more information regarding this page refer to **Scheduling**.
3. Click on **Save** to keep any changes made or
4. Click on **Back** to return to the **Warnings** listing page.

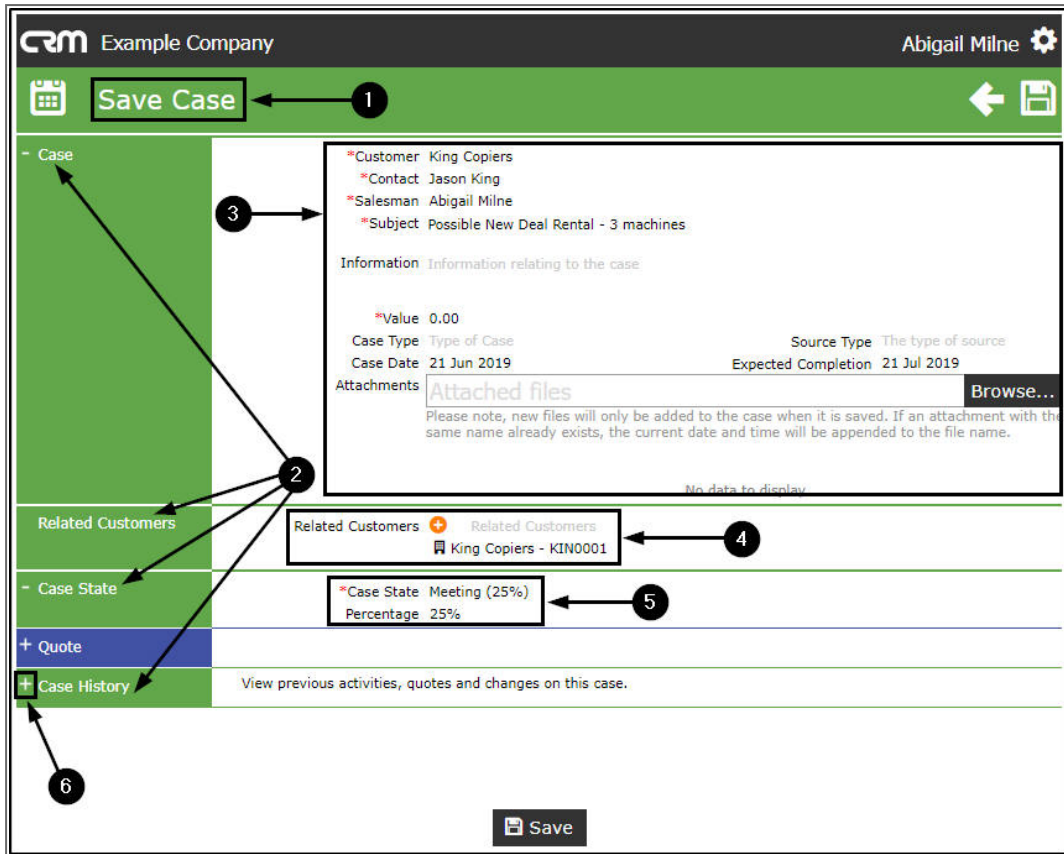


VIEW CASE INFO AND HISTORY

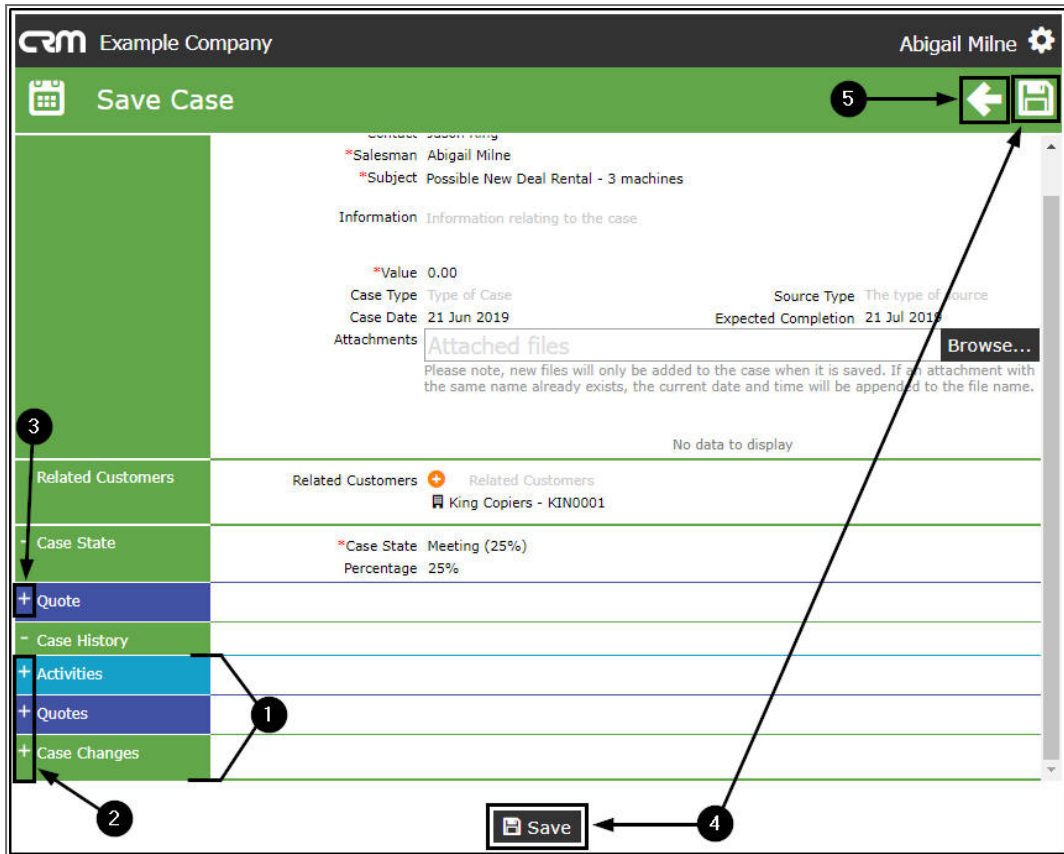
- In the Warnings page, hover over an activity, to reveal the **Action buttons**.
- Click on the **View Case Info and History** icon



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.

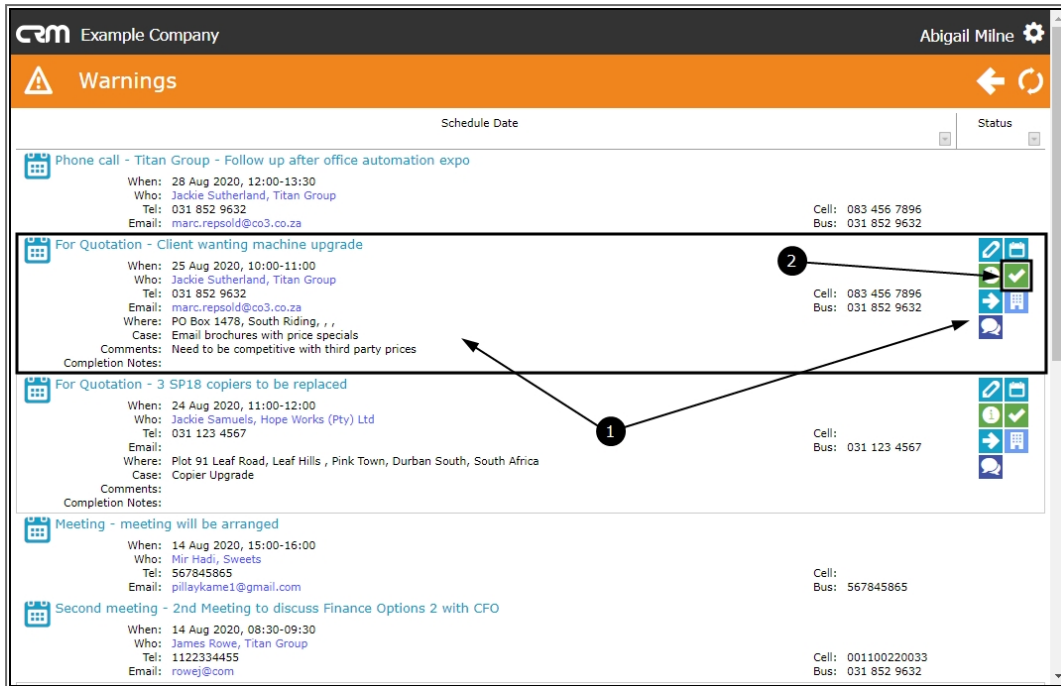


1. The 3 Case History sub-frames can now be viewed.
2. Expand these sub-sections to:
 - i. view an historical list of **Activities** and if an Activity is open it can be actioned using the **Action buttons**,
 - ii. view and edit linked **Quotes** and
 - iii. view any **Case Changes**.
3. In this page, 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.

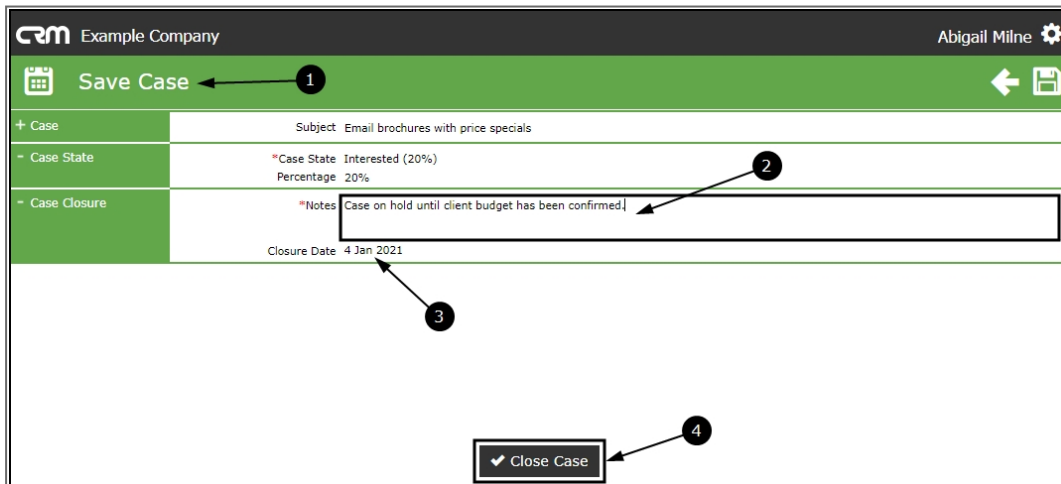


CLOSE THIS CASE

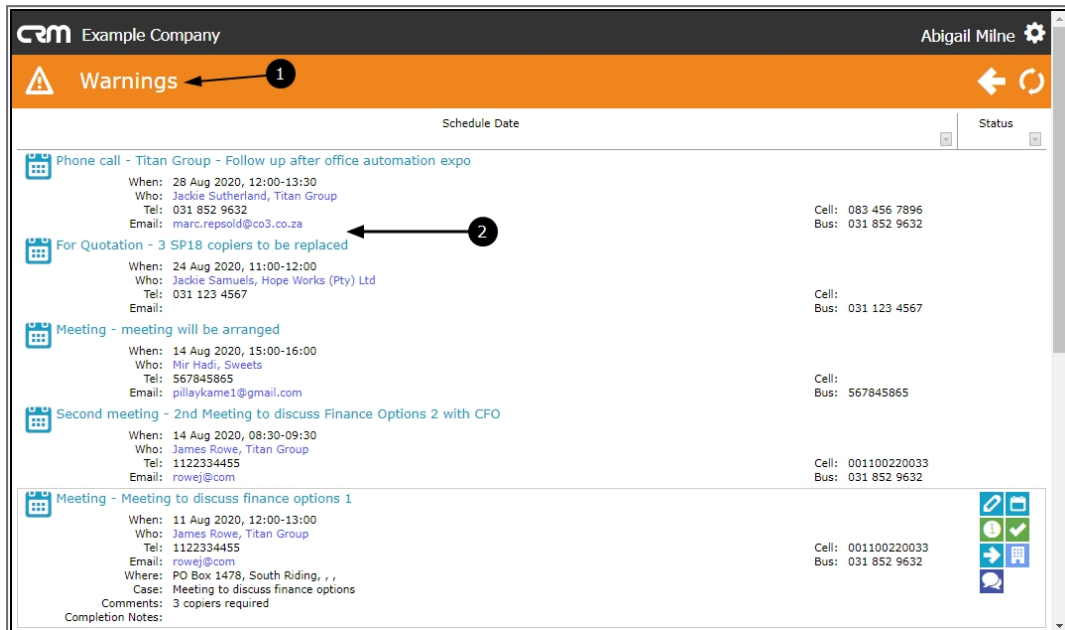
- In the Warnings page, hover over an activity, to reveal the **Action buttons**.
- Click on the **Close this Case** icon.



- 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 cannot 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.

The screenshot shows a CRM interface for 'Example Company' with a user 'Abigail Milne'. The 'Warnings' section lists several activities:

- Phone call - Titan Group - Follow up after office automation expo** (28 Aug 2020, 12:00-13:30)
- For Quotation - 3 SP18 copiers to be replaced** (24 Aug 2020, 11:00-12:00)
- Meeting - meeting will be arranged** (14 Aug 2020, 15:00-16:00)
- Second meeting - 2nd Meeting to discuss Finance Options 2 with CFO** (14 Aug 2020, 08:30-09:30)
- Meeting - Meeting to discuss finance options 1** (11 Aug 2020, 12:00-13:00)

Callout 1 points to the 'Comments' field of the 'Second meeting' activity. Callout 2 points to the 'Completion Notes' field of the same activity.

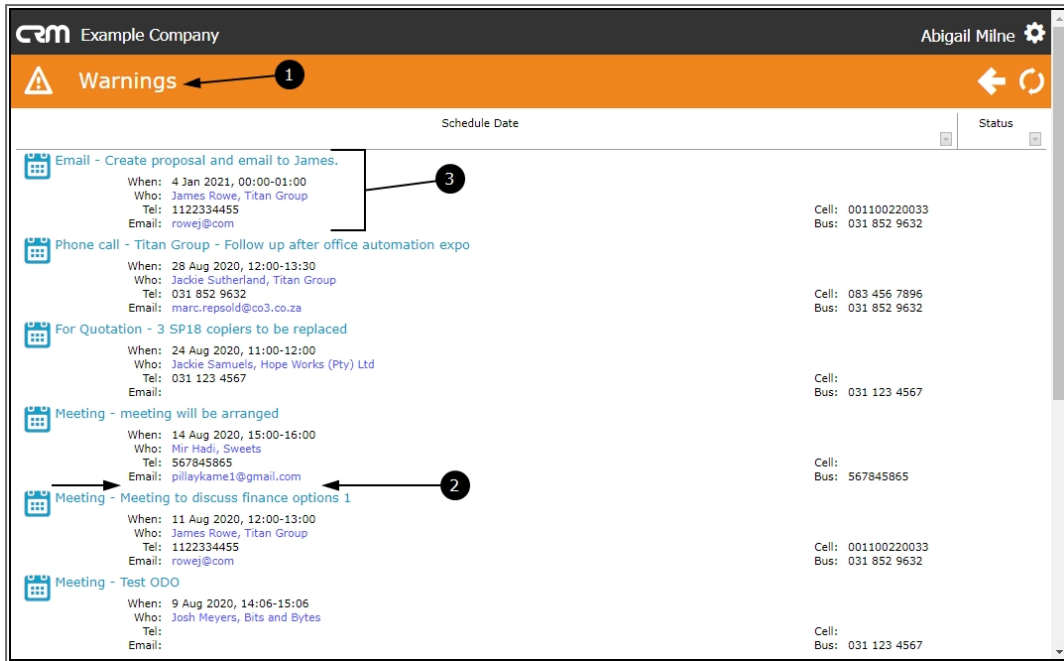
1. The **Next Activity** page will open.
2. Ensure that you update the **Completed Activity** *Notes, this is mandatory.
3. Fill in the information for the **New Activity**.

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**.

The screenshot shows the 'Next Activity' form in a CRM system. The form is divided into several sections:

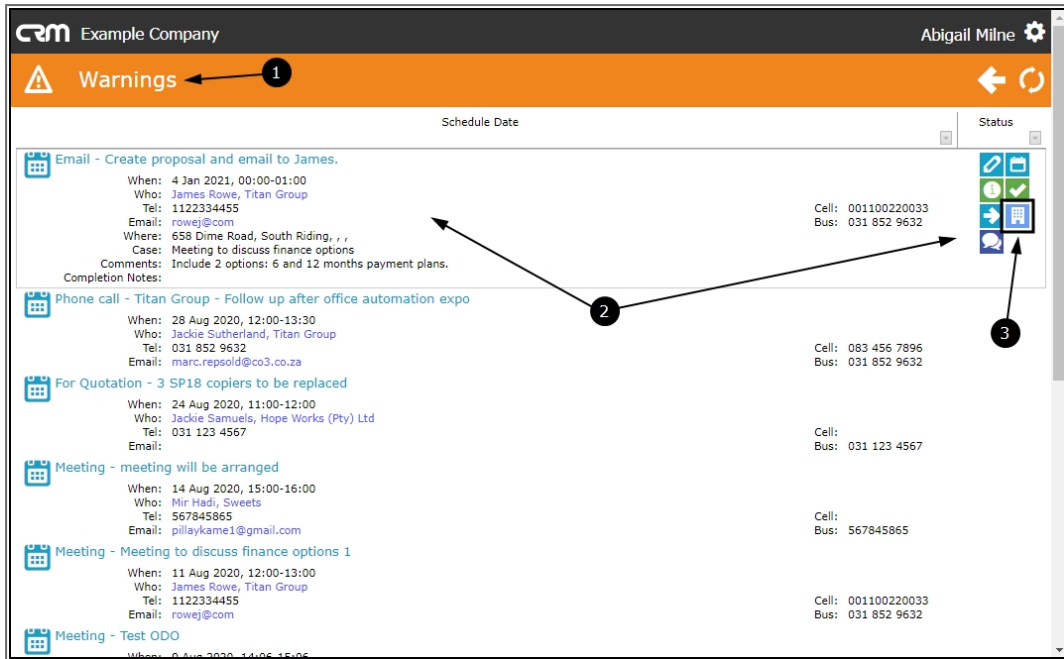
- Case:** Subject: Meeting to discuss finance options
- Case State:** *Case State Interested (20%), Percentage 50%
- Completed Activity:** Summary: James Rowe - Titan Group, 2nd Meeting to discuss Finance Options 2 with CFO, 2020/08/14 8:30 AM-9:30 AM AM. *Notes: Options discussed, proposal pending. (Annotation 1 points to this field)
- New Activity:** *Type Email, *Subject Create proposal and email to James. Address: 658 Dime Road South Riding. Comments: Include 2 options: 6 and 12 months payment plans. (Annotation 2 points to this section)
- Activity Attendees:** Attendees: Abigail Milne, James Rowe. Send Email Invites: *note that invitations can only be sent to attendees with valid email addresses.
- Schedule:** Date: 4 Jan 2021, from 00:00 to 01:00. (Annotation 2 points to this field)
- Reminder:** Reminder Email SMS 30 minutes before scheduled start. (Annotation 2 points to this field)
- Save:** A Save button is located at the bottom of the form. (Annotation 3 points to this button)

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.

The screenshot displays a CRM dashboard for 'Example Company' with user 'Abigail Milne'. The main section is for 'Titan Group' (TIA001). It includes a table of activities for the last 30 days, performance charts for the last 3 months and a 4-month pipeline, and a 12-month sales history chart. A sidebar contains various action buttons, with a 'Warnings' button highlighted. A callout box shows details for a specific warning, including a 75% completion status and a list of action buttons. A search bar is located at the top right.

| Description | Target | Existing Custmrs | New Custmrs |
|-----------------------|--------|------------------|-------------|
| Email | 50 | 0 | 0 |
| For Quotation | 0 | 0 | 0 |
| Gather Web Infomation | 50 | 0 | 0 |
| Meeting | 15 | 0 | 0 |
| Phone call | 24 | 0 | 0 |
| Second meeting | 10 | 0 | 0 |
| Site inspection | 10 | 0 | 0 |

| Category | Value |
|----------|-------|
| Cases | ~15 |
| Invoices | ~15 |
| Orders | ~15 |
| Quotes | ~50 |

| Month | Value |
|----------|-------|
| Jan 2021 | ~0.10 |
| Feb 2021 | ~0.10 |
| Mar 2021 | ~0.10 |
| Apr 2021 | ~0.10 |

| Month | Contract Income | Sales Revenue |
|----------------|-----------------|---------------|
| January 2020 | ~800 | ~800 |
| February 2020 | ~800 | ~800 |
| March 2020 | ~800 | ~800 |
| April 2020 | ~800 | ~800 |
| May 2020 | ~800 | ~800 |
| June 2020 | ~800 | ~800 |
| July 2020 | ~800 | ~800 |
| August 2020 | ~800 | ~800 |
| September 2020 | ~800 | ~800 |
| October 2020 | ~800 | ~800 |
| November 2020 | ~800 | ~800 |
| December 2020 | ~800 | ~800 |
| January 2021 | ~800 | ~800 |

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 screenshot shows a CRM interface titled 'Warnings' for 'Example Company'. The user 'Abigail Milne' is logged in. The interface displays a list of activities with columns for 'Schedule Date' and 'Status'. A table of activities is shown below:

| Activity Title | When | Who | Tel | Email | Cell | Bus |
|---|--------------------------|--|--------------|---------------------------|--------------|--------------|
| Email - Create proposal and email to James. | 4 Jan 2021, 00:00-01:00 | James Rowe, Titan Group | 1122334455 | rowej@com | 001100220033 | 031 852 9632 |
| Phone call - Titan Group - Follow up after office automation expo | 28 Aug 2020, 12:00-13:30 | Jackie Sutherland, Titan Group | 031 852 9632 | marc.repsold@co3.co.za | 083 456 7896 | 031 852 9632 |
| For Quotation - 3 SP18 copiers to be replaced | 24 Aug 2020, 11:00-12:00 | Jackie Samuels, Hope Works (Pty) Ltd | 031 123 4567 | | | |
| Meeting - meeting will be arranged | 14 Aug 2020, 15:00-16:00 | Mir Hadi, Sweets | 567845865 | pillaykame1@gmail.com | 567845865 | |
| Meeting - Meeting to discuss finance options 1 | 11 Aug 2020, 12:00-13:00 | James Rowe, Titan Group | 1122334455 | rowej@com | 001100220033 | 031 852 9632 |
| Meeting - Test ODO | 9 Aug 2020, 14:06-15:06 | Josh Meyers, Bits and Bytes | | | 031 123 4567 | |
| Site inspection - Test Travel Button | 8 Aug 2020, 07:00-08:00 | Tarryn Snow CUSTOMER CONTACT, Big Bargains | 031 123 4567 | kameshni.pillay@co3.co.za | | |
| Site inspection - Install machines on all levels | | | | | 031 456 7897 | |

Annotations in the screenshot: A circle '1' points to the 'Phone call' entry, and a circle '2' points to the call icon in the status column of the same entry.

- 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**.

| Item Type | Item Code | Quote Item Description | Quantity | Unit Cost | Item Price | Payment per Period | Total | Actions | Total Inclusive | Suppress on Print |
|-----------|-----------|--------------------------------|----------|-----------|------------|--------------------|----------|---------|-----------------|-------------------|
| INVN | SP2020 | SP2020 Sprint Colour MF Copier | 3 | 9079.41 | 0.00 | | 0.00 | | 0.00 | |
| INVN | 2020-856 | Drum | 3 | 1177.62 | 0.00 | 0.00 | 0.00 | | 0.00 | |
| | | | | | | | 10257.03 | 0.00 | 0.00 | 0.00 |

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.

Quote saved successfully. Abigail Mthembu

Save Quote ← [Home] [Save]

Case Subject: Meeting to discuss finance options

Quote *A quote will only be created if you add quote line items.
 *Customer: Titan Group Date: 5 Jan 2021
 *Quote Contact: James Rowe *Site: Durban
 Quote Reference: QT0000320 *Print Layout: SALESQUOTE_TIT001
 Reference: Reference
 Comments: Proposal accepted in principle, email quote with 2 financial options: 6 and 12 months.

Quote Financials *Currency: South African Rand Quote Terms: Full Payment COD
 Tax Rate: 15,00000 *Commercial: Discount Commercial
 *Exchange Rate: 1.0000

| Item Type | Add item | Type to find items... | Quantity | Unit Cost | Item Price | Payment per Period | Total | Actions | Total Inclusive | Suppress on Print |
|-----------|----------|--------------------------------|----------|-----------|------------|--------------------|-------|-----------------|-----------------|-------------------|
| INVN | SP2020 | SP2020 Sprint Colour MF Copier | 3,00 | 9079,41 | 0,00 | 0,00 | 0,00 | [Copy] [Delete] | 0,00 | |
| INVN | 2020-856 | Drum | 3,00 | 1177,62 | 0,00 | 0,00 | 0,00 | [Copy] [Delete] | 0,00 | |
| | | | 6,00 | 10257,03 | 0,00 | 0,00 | 0,00 | | 0,00 | |

[Delete] [View] [Save] [Copy]

CRM.000.011