

CRM BASICS

CASES

A Case is like an opportunity: a reason to engage with a client in order to fulfill a sale requirement or propose a deal. A case gives rise to a quote and subsequent new deal.

A Case can be viewed as an umbrella over all the underlying activities that work towards achieving a contract with that customer.

There is certain criteria required when dealing with Cases:

- A **customer** is required in order to create a Case.
- A Case is required to raise an **Activity**.
- Only one Activity per Case can be open at any one time.

A full list of Cases can be accessed from the CRM Homepage as set out below.

Customer specific Cases can be accessed from the Customer Homepage.

CRM will prompt you to create a new Case, when **raising a new Activity** for a customer.

Quotes can be added to a Case from the **My Cases** listing page when using the following **Action** buttons:

- Viewing Case Info and History
- View / Edit this Case
- New Activity

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

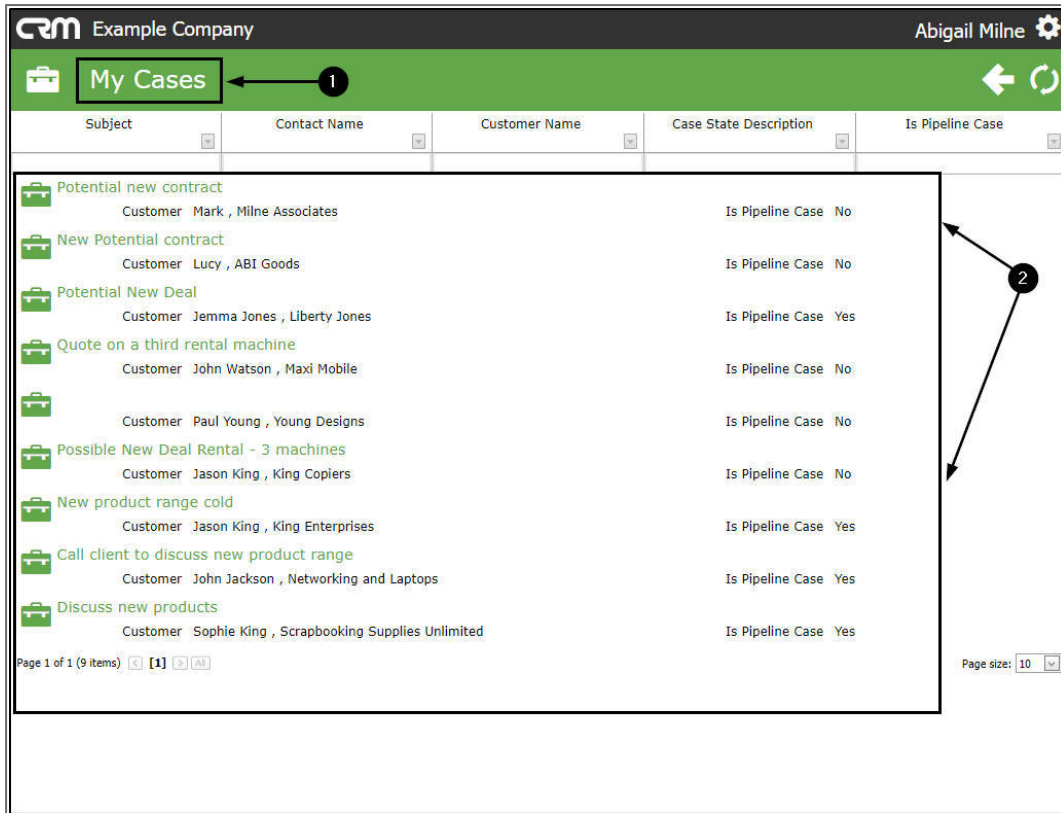
VIEW ENTIRE CASE LIST FROM HOMEPAGE

1. In the *Home page*,
2. Click on the *Cases* tile.

The screenshot shows the CRM dashboard for 'Example Company' with user 'Abigail Milne'. The dashboard includes a navigation bar with 'Dashboard' (1), a search bar, and three main performance charts: 'Activities for Last 30 Days', '1 Month Performance', and '4 Month Pipeline'. Below these are several tiles: 'create cold call', 'recommendations', 'warnings', 'customers', 'cases' (9), 'activities' (9), 'quotes', 'equipment', and '3rd party'. A red circle and arrow point to the 'cases' tile. The 'cases' tile is highlighted in green. Below the tiles is a list of activities, with the first one being 'Phone call - King Enterprises: Confirm meeting times with new Purchasing Manager'. The activity details include: When: 23 Jul 2019, 17:00-18:00; Who: Jason King, King Enterprises; Tel: [redacted]; Cell: 0123456789; Email: [redacted]. The page footer shows '©2019 CO3 Technologies (Pty) Ltd (3.5.6.0 / 3.5.6.0)'.

MY CASES PAGE

- The *My Cases* page will be displayed.
- Here you can view the entire case list for all customers.



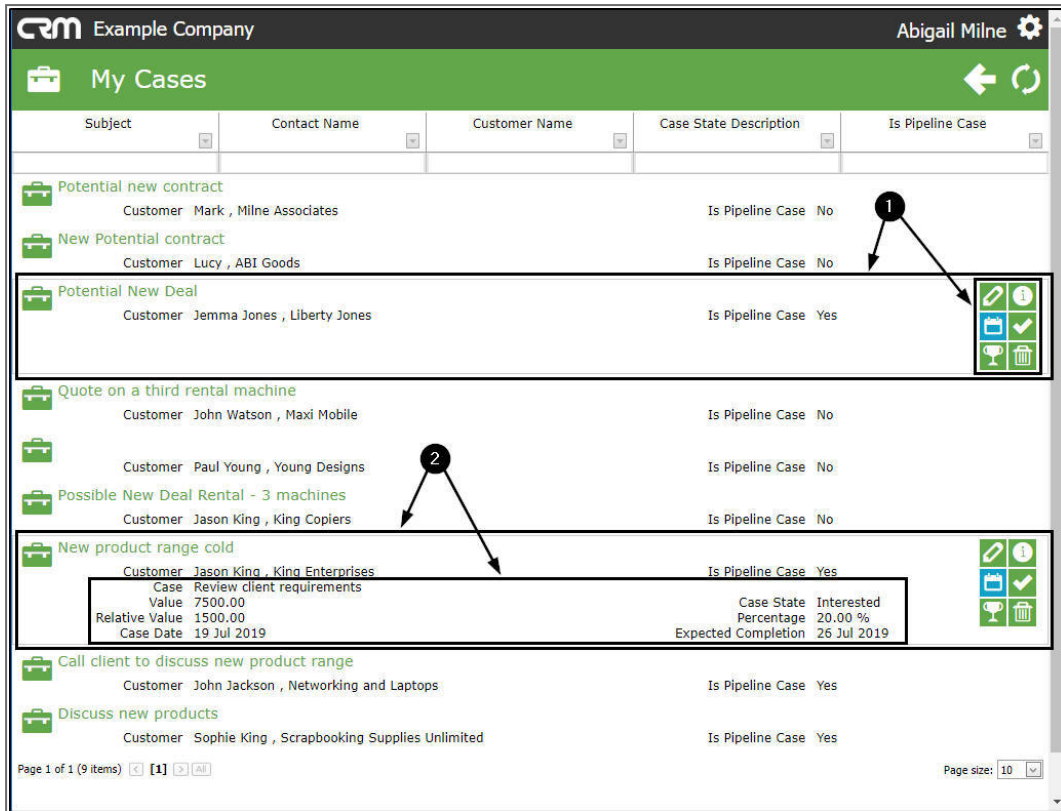
CASE ACTION BUTTONS

1. Hover over any Case to reveal the **Action** buttons:

- View / Edit this Case
- View Case info and history
- New Activity
- Close this case
- Won this Case
- Lost this Case

VIEW CASE SUMMARY

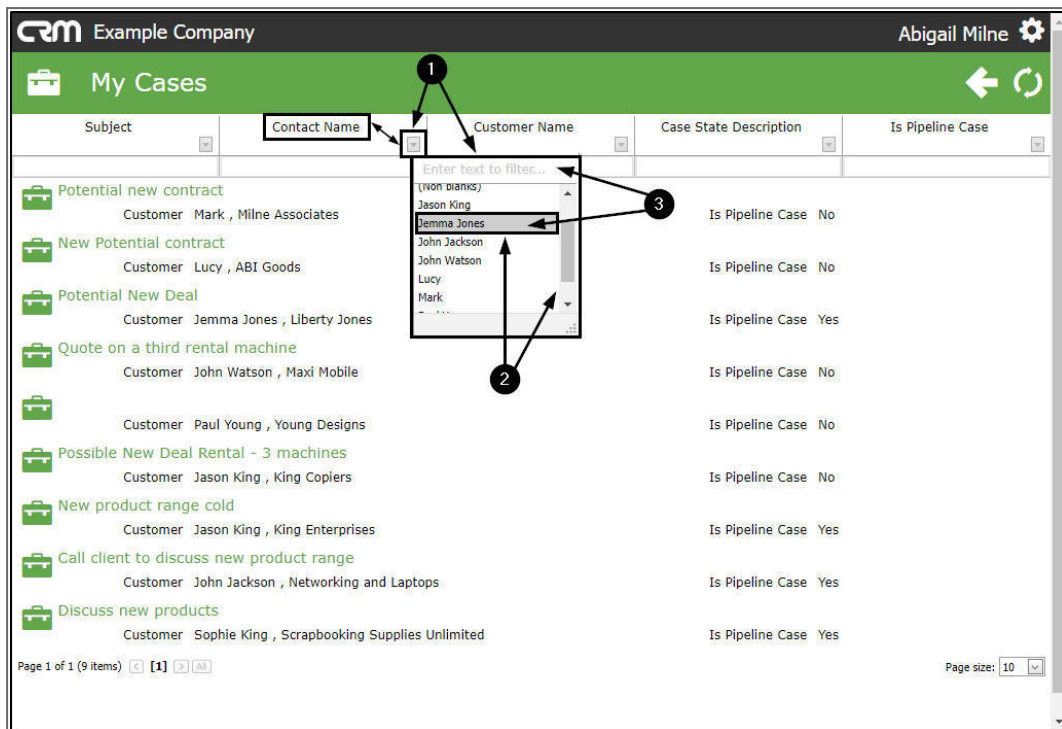
2. **Single click** on any Case to access a **quick view summary** of the Case information.



SEARCH FOR A CASE

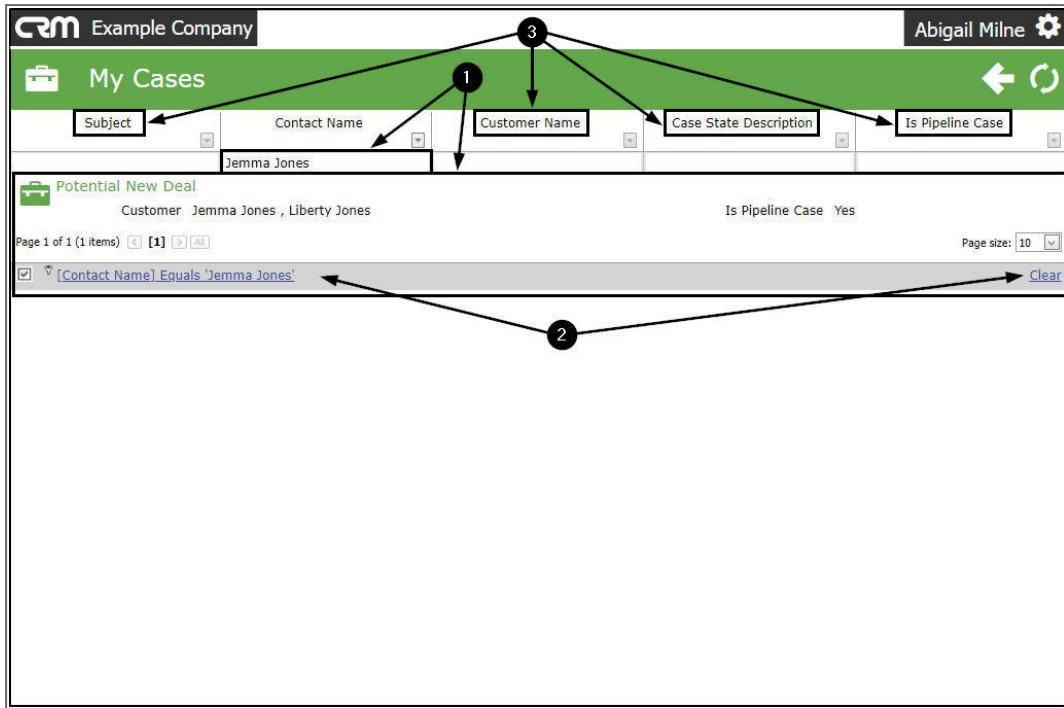
You can search for a specific Case using the **Filter Row** and **Filter List** Functionality

1. You can click on a **filter arrow** to display the applicable drop-down menu.
 - In this example, the selected filter arrow is in the **Contact Name** column, therefore the menu displayed will list all the contact names linked to your cases.
2. Either **scroll** through the list to find the relevant contact name from the menu.
3. Or use the **filter box** to type in the relevant contact name, the system will search for the name as you type. Click on the name.



1. The **My Cases** page will now list only the cases linked to this contact name.
2. The **filter row** will display the filter sequence. You can click on **Clear** to remove any filter(s). The page will then display the full My Cases list again.
3. You can search for specific cases in this way using any of the columns:
 - **Subject**
 - **Contact Name**
 - **Customer Name**
 - **Case State Description**
 - **Is Pipeline Case**

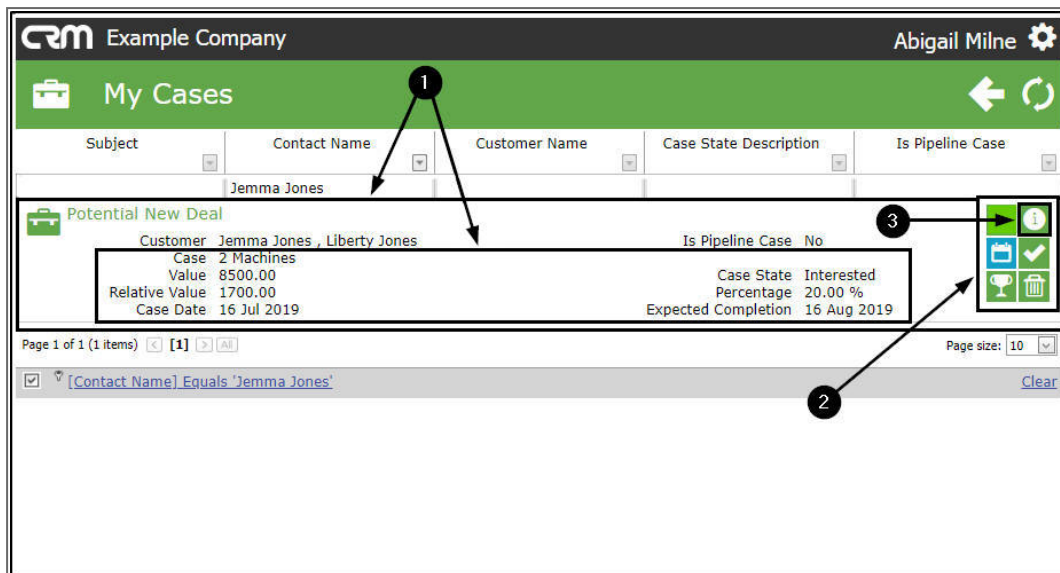
and a combination of columns if required e.g. **Customer Name** and **Case Description**.



CASES – ACTION BUTTONS

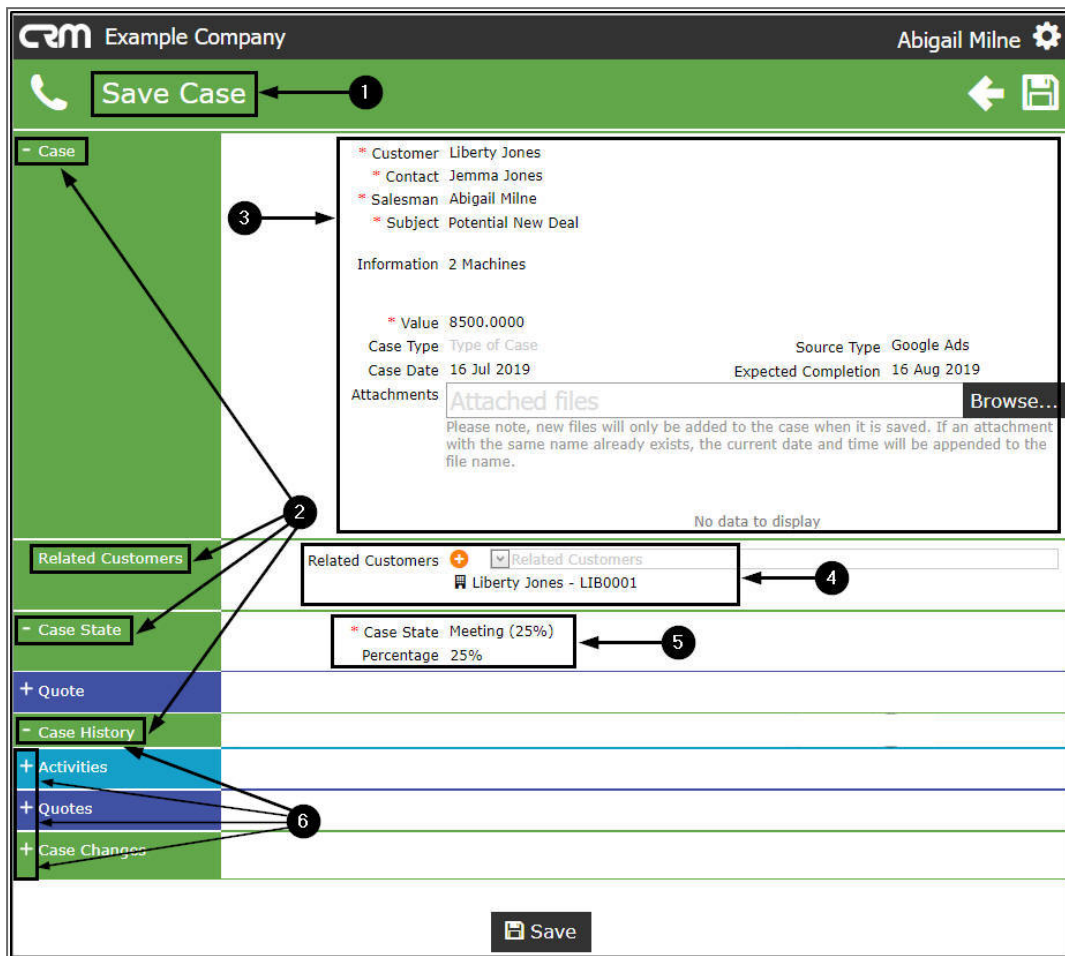
CASE INFORMATION AND HISTORY

1. **Single click** anywhere on this Case to display the **summary** of the Case information and to reveal the
2. **Action Item** buttons.
3. 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 three Case History sub-sections to:
 - view an historical list of (i) **Activities** and if an Activity is open it can be actioned using the **Action buttons**,

- view and edit linked (ii) **Quotes** and
- view any (iii) **Case Changes**.



1. In this page, you can create a **new Quote** linked to to this Case. Refer to [Add a new Quote linked to this Case](#) for more information.
2. Click on the **Back** button to return to the **My Cases** page.

CRM Example Company Abigail Milne

Save Case

- Case

- *Customer: Liberty Jones
- *Contact: Jemma Jones
- *Salesman: Abigail Milne
- *Subject: Potential New Deal

Information: 2 Machines

*Value: 8500.00

Case Type: Type of Case Source Type: Google Ads

Case Date: 16 Jul 2019 Expected Completion: 16 Aug 2019

Attachments: Attached files

Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

No data to display

Related Customers

- Related Customers + Related Customers:
 - ABI Goods - AB10001
 - Liberty Jones - LIB0001

- Case State **1**

- *Case State: Meeting (25%)
- Percentage: 25%

+ Quote

- Case History

+ Activities

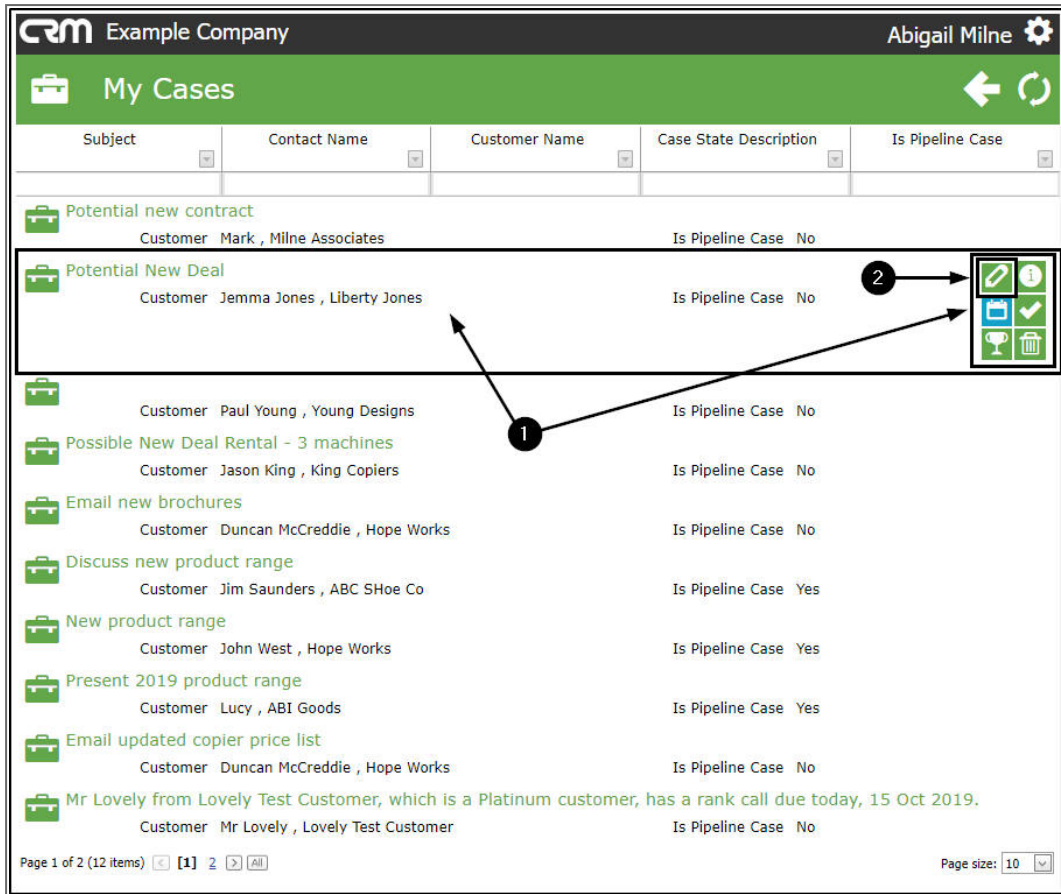
+ Quotes

+ Case Changes

2 → [View/Edit this Case icon]

VIEW / EDIT THIS CASE

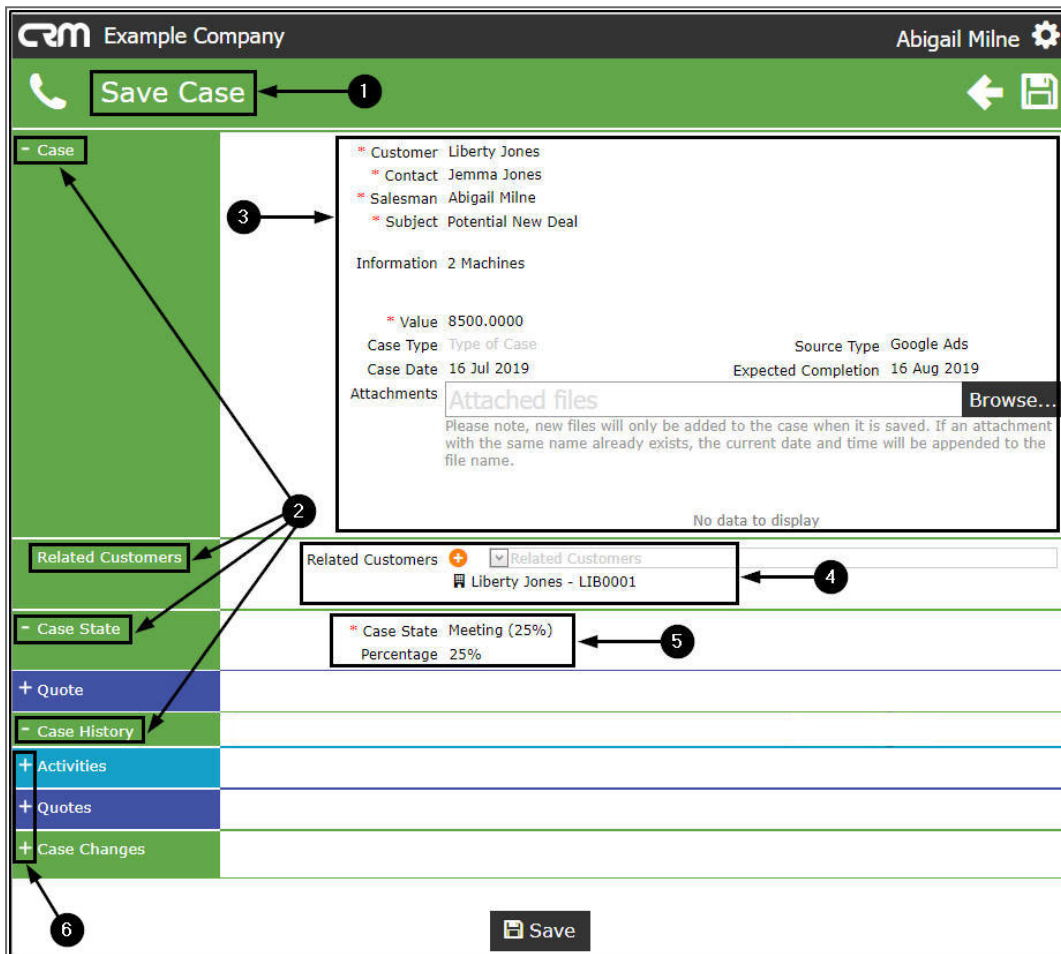
1. In the *My Cases* page, hover anywhere over a Case to display the *Action Items* buttons.
2. Click on the *View/Edit this Case* icon.



1. The **Save Case** page will be displayed.
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).

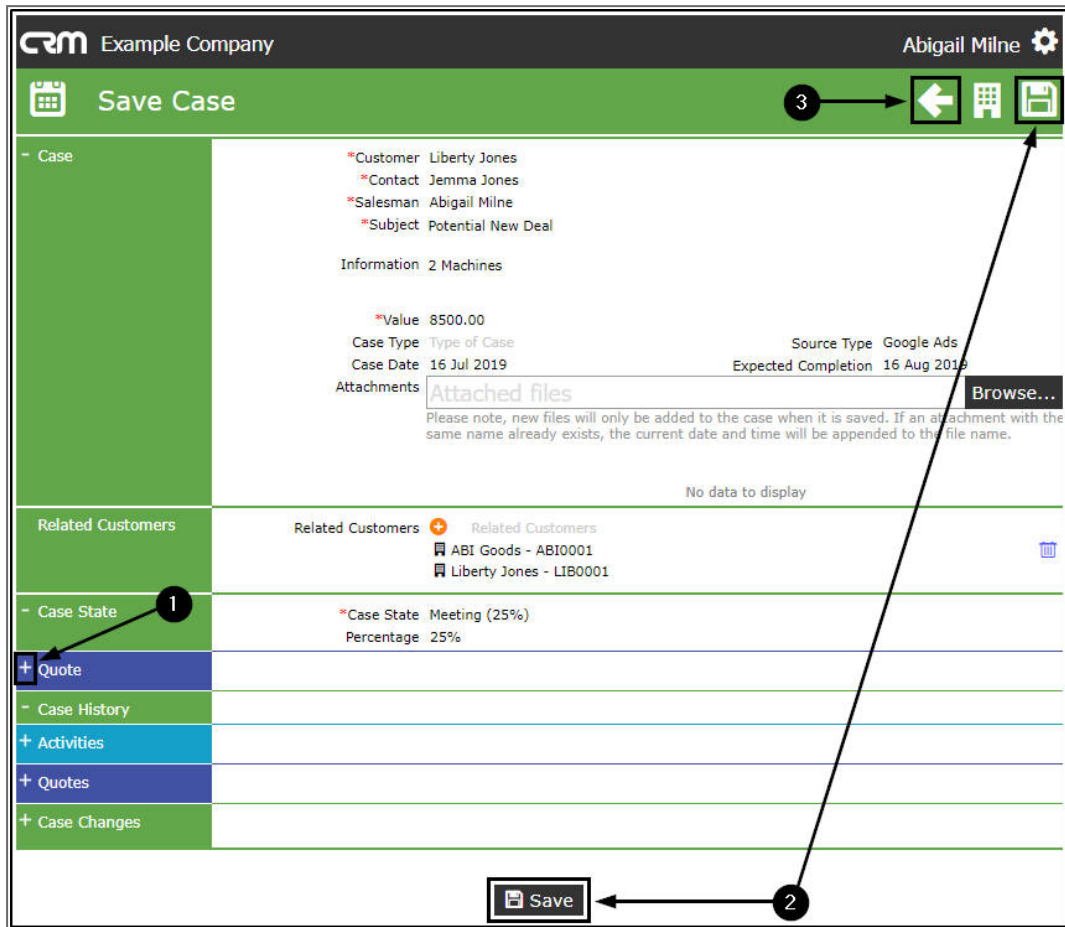
6. Case History

- Here you can expand the three **Case History** sub-sections to:
 - view an historical list of (i) **Activities** and if an Activity is open it can be actioned using the **Action buttons**,
 - view and edit linked (ii) **Quotes** and
 - view any (iii) **Case Changes**.



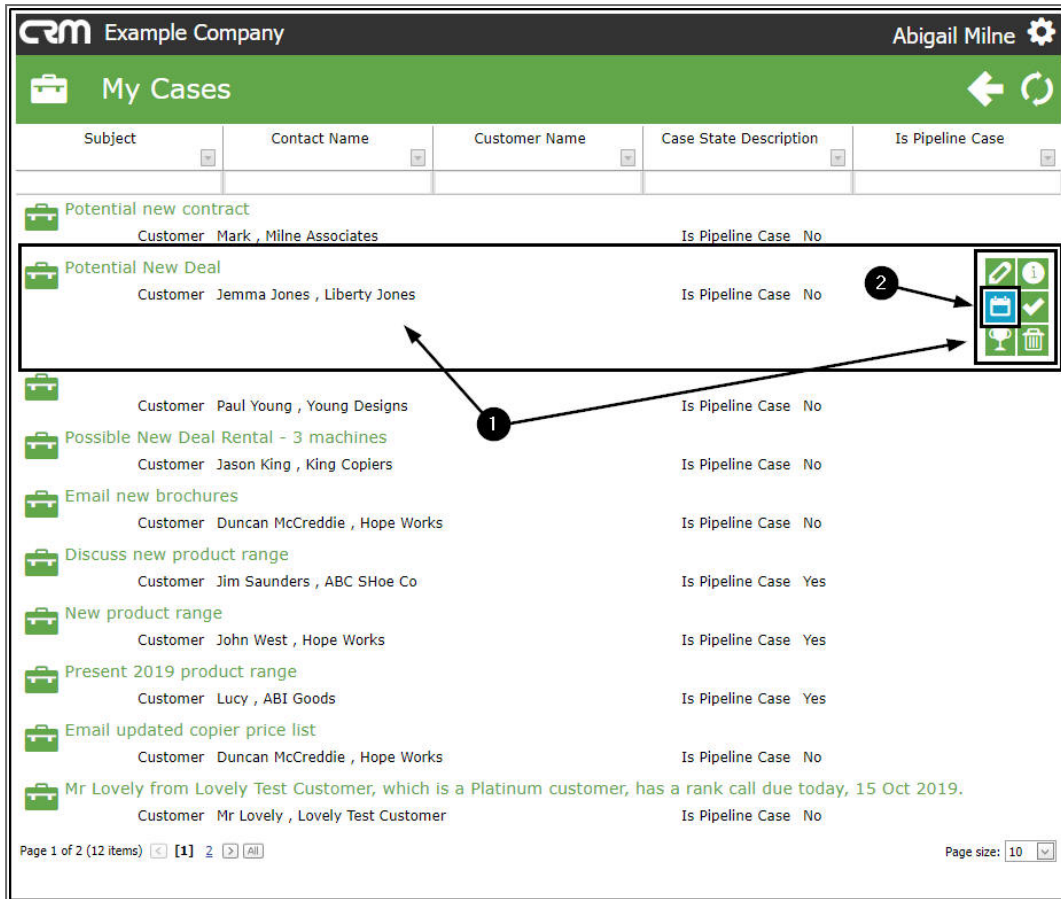
1. In this page, you can link a **Quote** to this Case. Refer to **Add a new Quote linked to this Case** for more information.

2. Click on **Save** to apply any changes or
3. Click on the **Back** button to return to the **My Cases** page.



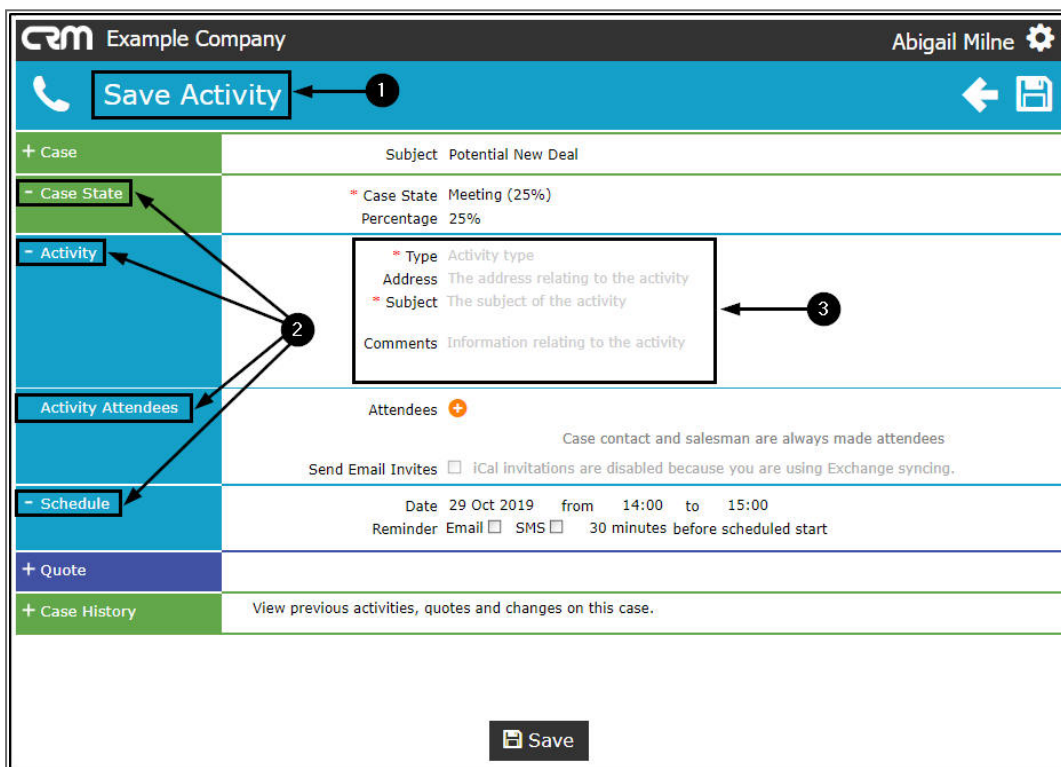
NEW ACTIVITY

1. In the **My Cases** page, hover anywhere over a Case to display the **Action Items** buttons.
2. Click on the **New Activity** icon.



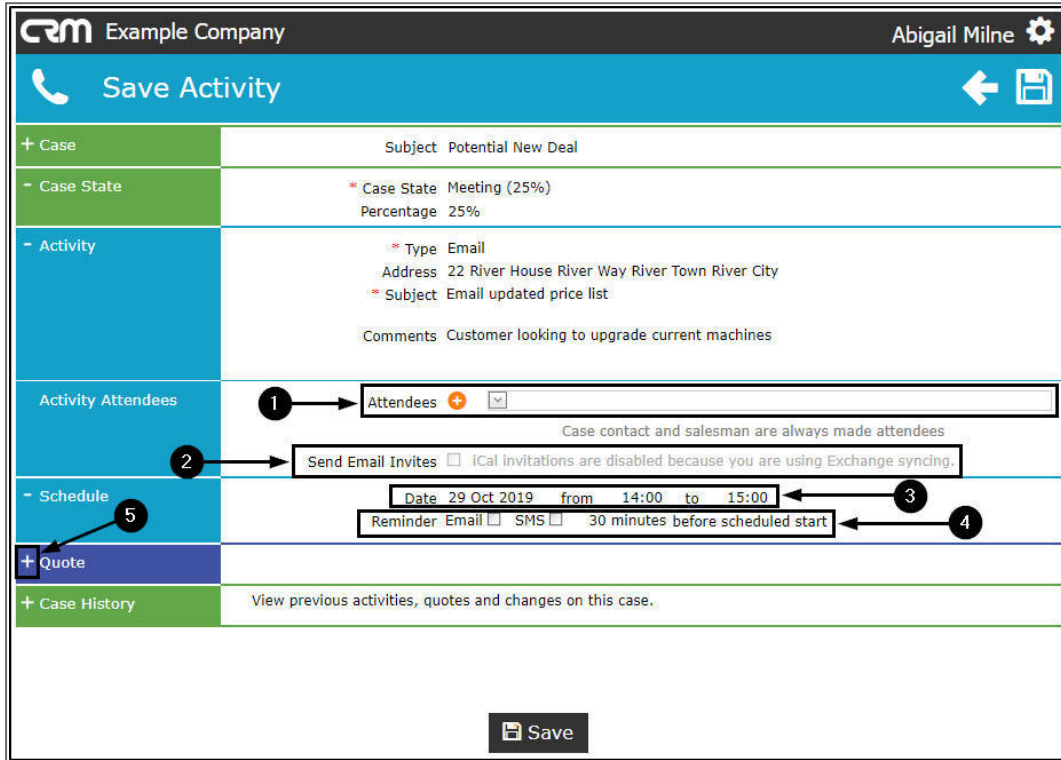
1. The **Save Activity** page will be displayed.
2. The following frames will be auto-expanded:
 - **Case State** The **Case State can be edited**, if required.
 - **Activity**
 - **Activity Attendees** and
 - **Schedule**
3. Update the Activity Information, if required:
 - **Type:**
 - Click in the **Type** field to display an **Activity Type** drop-down list.
 - Select from this list the applicable type (e.g. Phone call).

- **Address:**
 - Click in the **Address** field, a list of all addresses linked to the customer will be displayed.
 - Select the applicable address from this list.
- **Subject:**
 - Type in the **Subject** of this activity (e.g. Email updated price list).
- **Comments**
 - Type in a **Comment** relating to this activity (e.g. Customer looking to upgrade current machines).



1. You can select **Attendees** to link to the activity.
 - In this field you can select from **employees** and the **current customer contacts**.
2. You can select to **Send Email Invites** in order to have the system send an email invite for this activity, to all attendees.

3. Schedule the **Date and Time** for the activity.
4. Set a **Reminder** Email or SMS as and if required.
5. In this page, you can link a **Quote** to this Case. Refer to **Add a new Quote linked to this Case** for more information.



1. Once you have added Attendees, you may also wish to link **Related Customers** in order to invite contacts from various clients to an Activity - such as a meeting or training session. (these are not found in the Attendees list).
2. Click on the **expand** button in the **Case** frame.

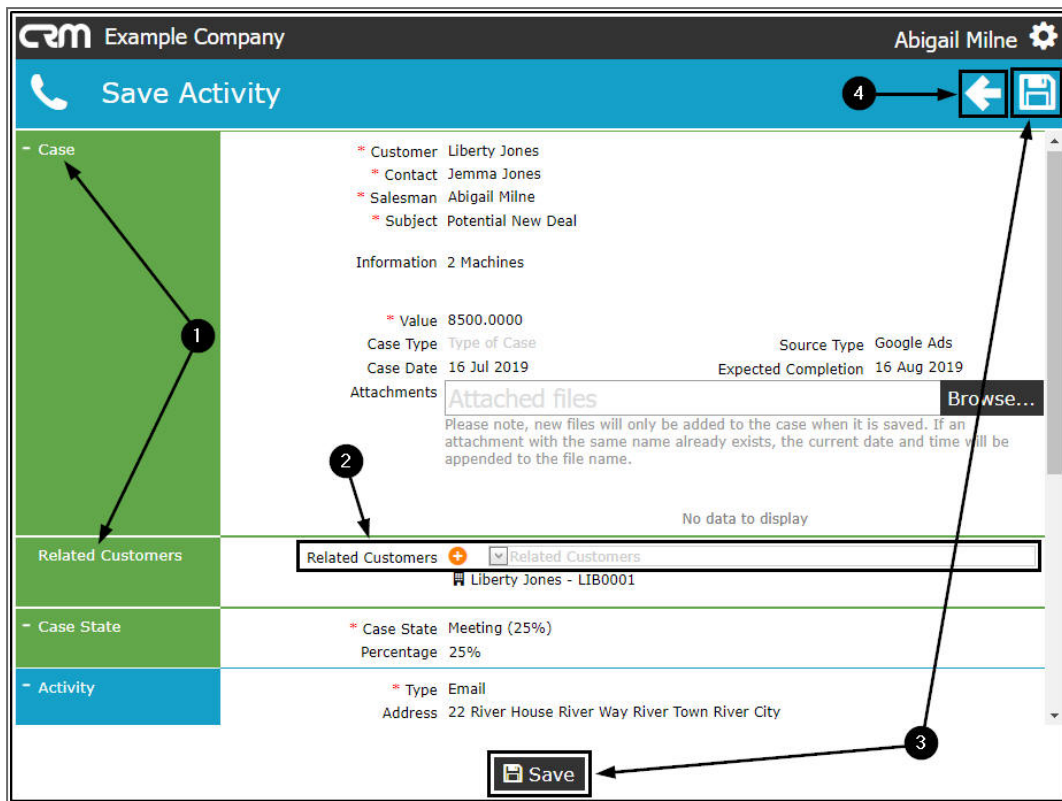
CRM Example Company
Abigail Milne

Save Activity

+ Case	Subject: Potential New Deal
- Case State 2	* Case State: Meeting (25%) Percentage: 25%
- Activity	* Type: Email Address: 22 River House River Way River Town River City * Subject: Email updated price list Comments: Customer looking to upgrade current machines
Activity Attendees	<div style="border: 1px solid black; padding: 5px;"> <p>Attendees + Carolina Lourens</p> <p> Davina Rowe </p> <p> Joel James </p> <p> Carolina Lourens </p> </div> <p style="font-size: small; text-align: center;">Page 1 of 1 (3 items) Page size: 10</p>
- Schedule	Date: 29 Oct 2019 from 14:00 to 15:00 Reminder: Email <input type="checkbox"/> SMS <input type="checkbox"/> 30 minutes before scheduled start
+ Quote	
+ Case History	View previous activities, quotes and changes on this case.

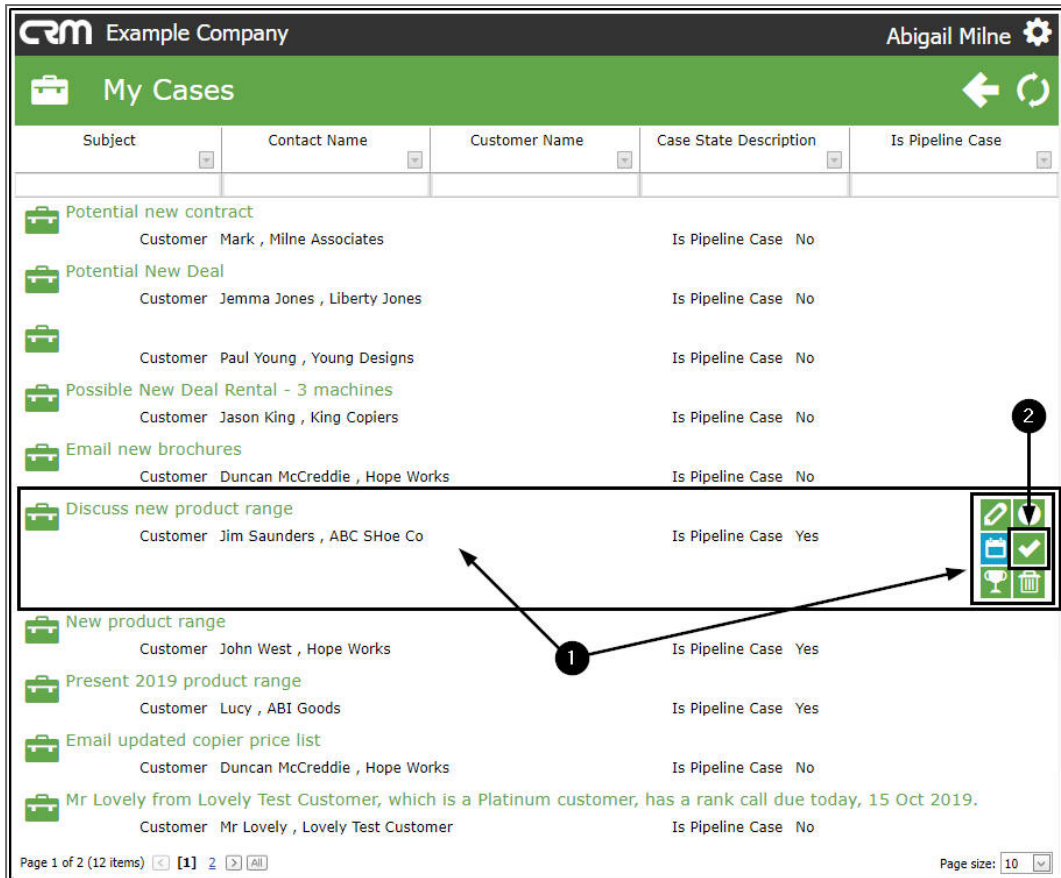
Save

1. The Case frame will be expanded to reveal the **Related Customers** frame.
2. Follow the process to **add the Related Customer(s)**, if required.
3. When you have finished adding the new activity details for this case, click on **Save** to return to the **My Cases** listing page .
4. If you do not wish to save any changes, click on the **Back** button to return to the previous page.

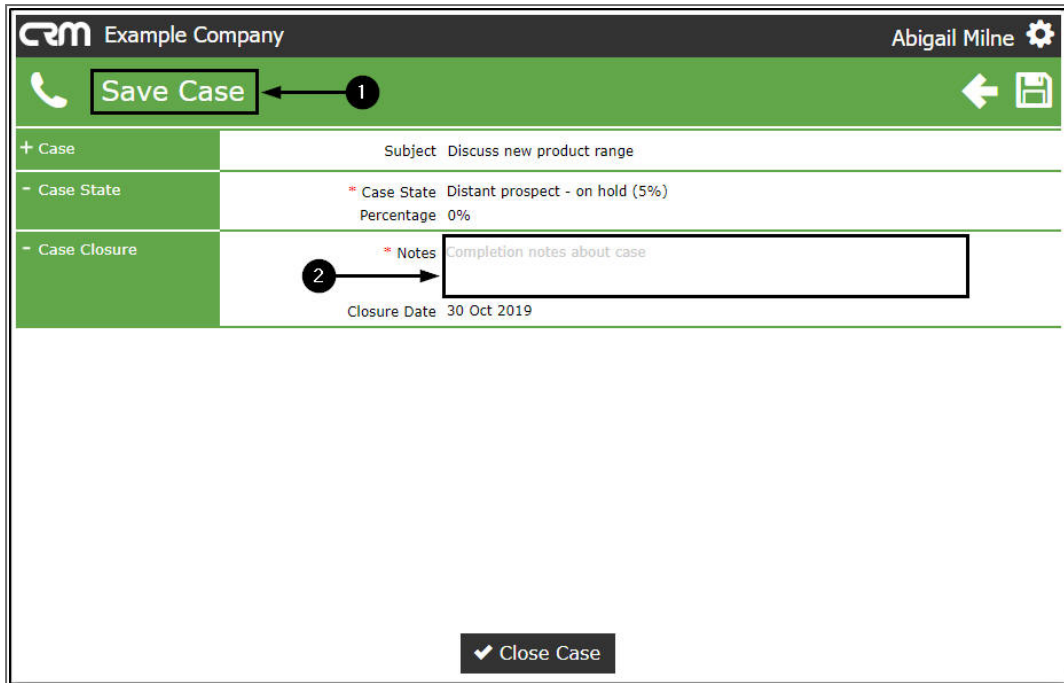


CLOSE THIS CASE

1. In the *My Cases* page, hover anywhere over a Case to display the *Action Items* buttons.
2. Click on the *Close this Case* icon.



1. The **Save Case** page will be displayed.
2. Type a completion note/explanation in the **Notes** field (e.g. Customer budget not yet approved for machine upgrade).



CRM Example Company Abigail Milne

Save Case ← 1

+ Case Subject Discuss new product range

- Case State * Case State Distant prospect - on hold (5%)
Percentage 0%

- Case Closure * Notes Completion notes about case
Closure Date 30 Oct 2019

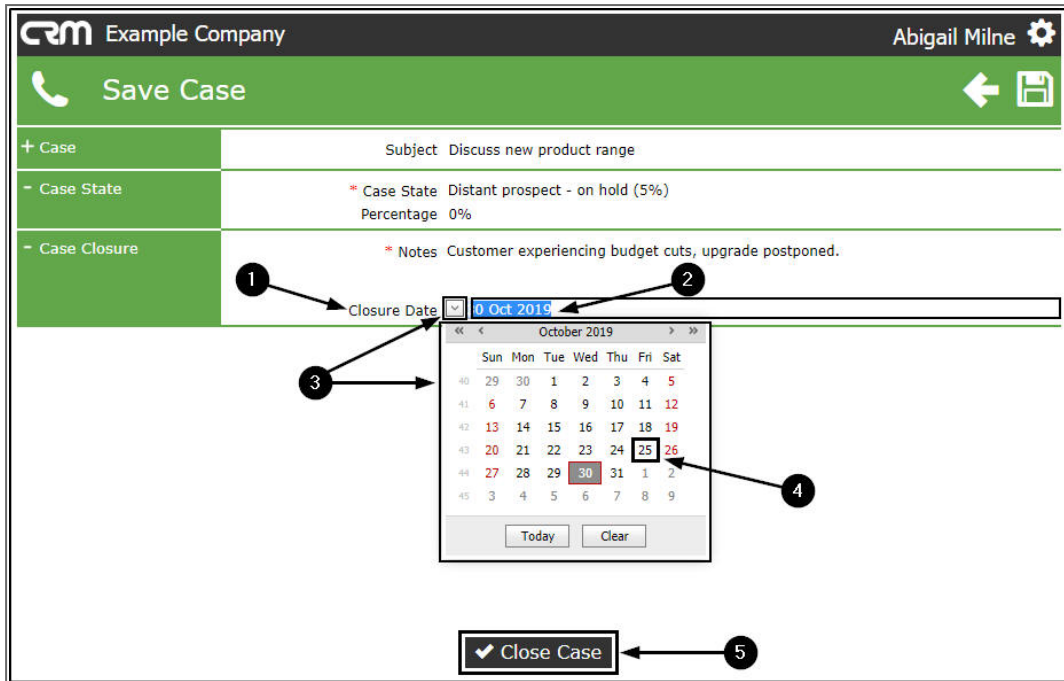
2 →

✓ Close Case

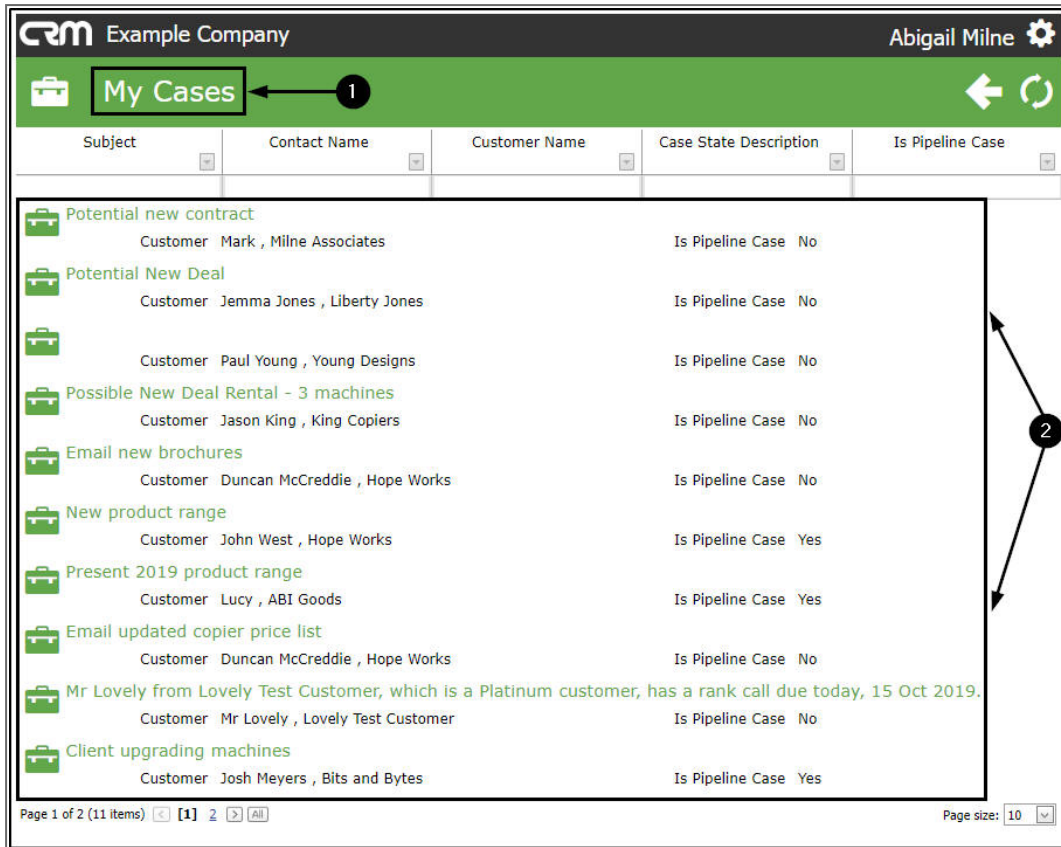
1. The **Closure Date** will auto populate with the current date.

If you wish to change this date,

2. Either, type the correct date directly in this field,
3. Or, click in this field to display a drop-down arrow, click on this arrow to bring up the calendar function.
4. Select the applicable alternative date.
5. Click on **Close Case**.



1. You will return to the **My Cases** listing screen.
2. The recently closed case (in this example for ABC Shoes Co) will have been **removed** from this list.



WIN THIS CASE

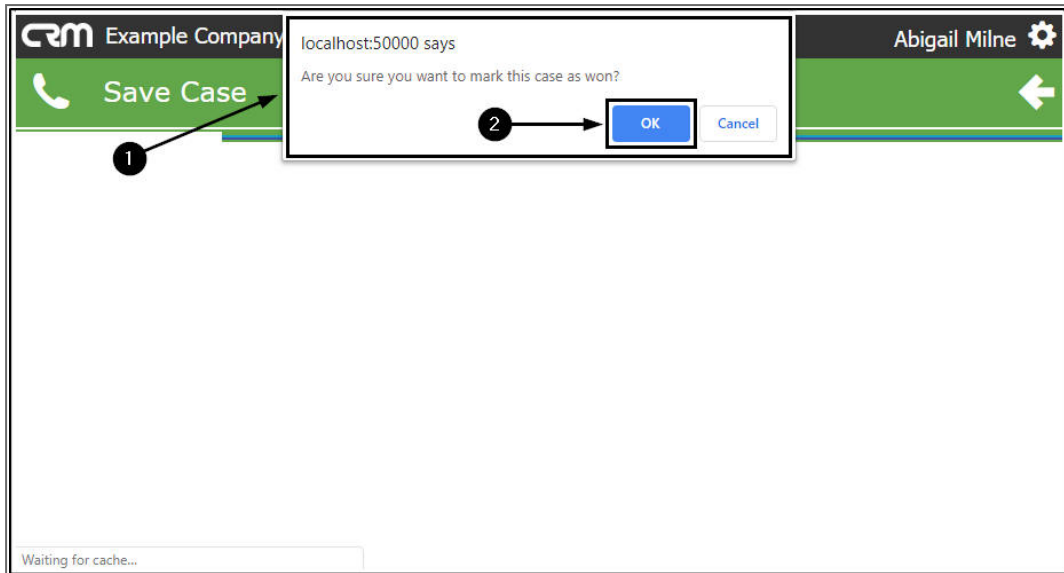
Note on Stage Gates: A Case cannot be Won using the Action Buttons, if this Case Type has Stage Gates Configured / Enabled. All Stage Gate Questions will need to be answered first, in order to 'Win the Case'.

1. Hover anywhere over a Case to display the **Action Items** buttons.
2. Click on the **Won this Case** icon.

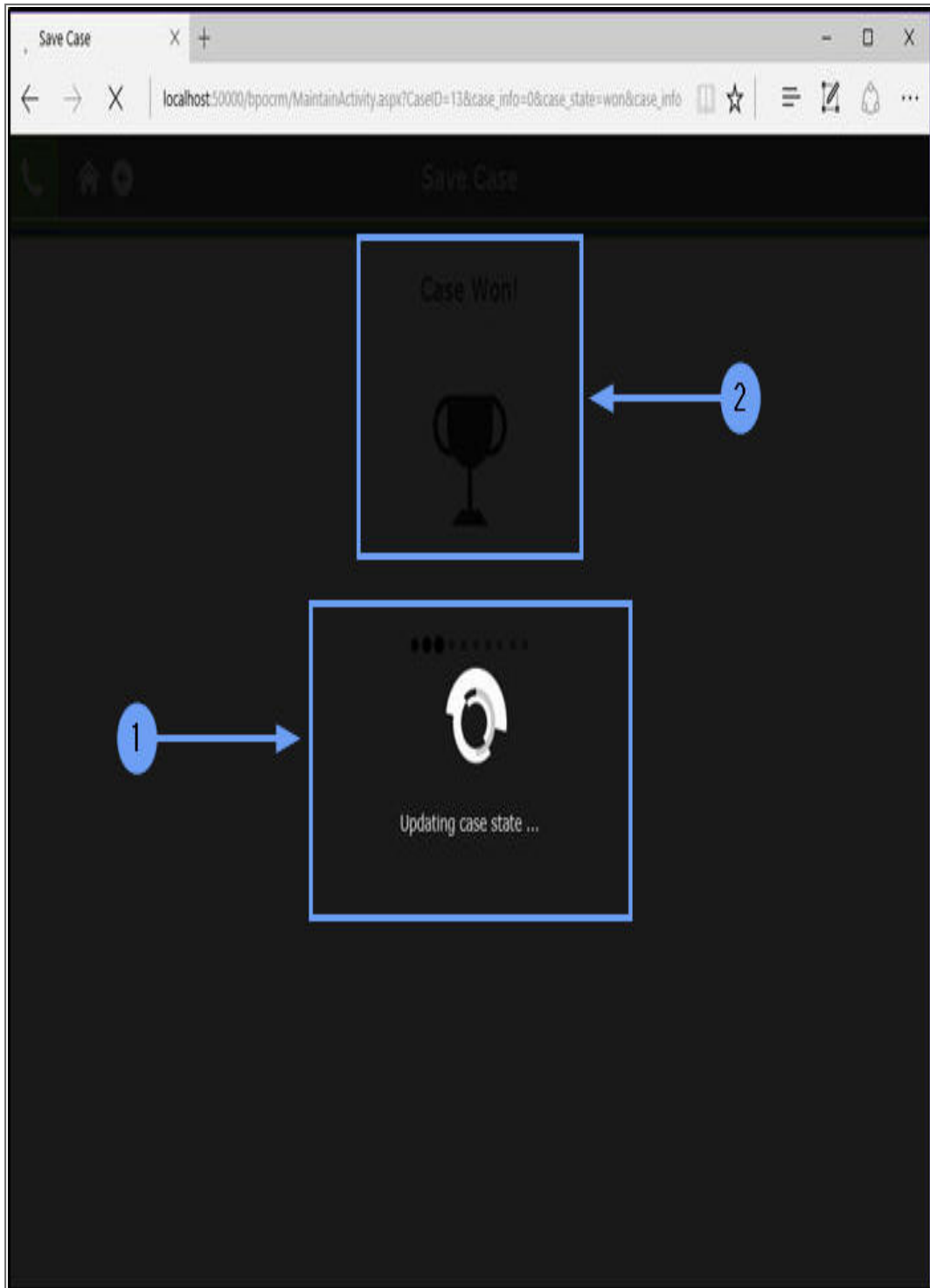
Note: A Case cannot be Won via Case Action Buttons - if this Case Type has Stage Gates Enabled. All Stage Gate Questions will need to be responded to, in order to 'Win the Case'.

Subject	Contact Name	Customer Name	Case State Description	Is Pipeline Case
Potential new contract	Customer Mark , Milne Associates			No
Potential New Deal	Customer Jemma Jones , Liberty Jones			No
	Customer Paul Young , Young Designs			No
Possible New Deal Rental - 3 machines	Customer Jason King , King Copiers			No
Email new brochures	Customer Duncan McCreddie , Hope Works			No
New product range	Customer John West , Hope Works			Yes
Present 2019 product range	Customer Lucy , ABI Goods			Yes
Email updated copier price list	Customer Duncan McCreddie , Hope Works			No
Mr Lovely from Lovely Test Customer, which is a Platinum customer, has a rank call due today, 15 Oct 2019.	Customer Mr Lovely , Lovely Test Customer			No
Client upgrading machines	Customer Josh Meyers , Bits and Bytes			Yes

1. A message box will pop up asking:
 - ***Are you sure you want to mark this case as won?***
2. Click on **OK**.



1. The system will update the case state.
2. A **Case Won** message with a **Trophy** image will briefly flash on the screen.



1. You will return to the **My Cases** screen.
2. The recently won case will no longer be displayed in this list.



LOST THIS CASE

1. Hover anywhere over a Case to display the **Action Items** buttons.
2. Click on the **Lost this Case** icon.

The screenshot shows a CRM interface for 'Example Company' with the user 'Abigail Milne'. The 'My Cases' section displays a table of cases. The table has columns for Subject, Contact Name, Customer Name, Case State Description, and Is Pipeline Case. The cases listed are:

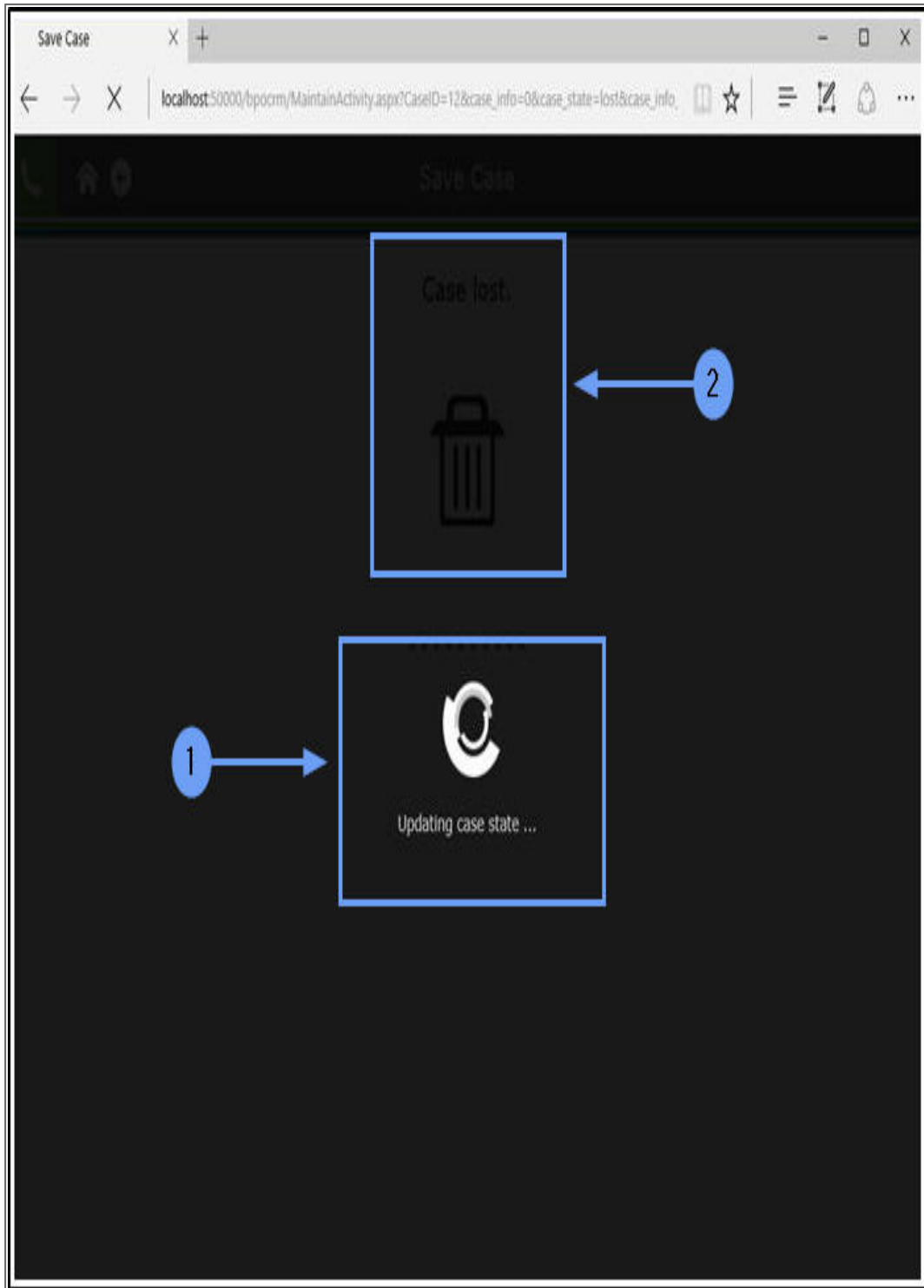
Subject	Contact Name	Customer Name	Case State Description	Is Pipeline Case
Potential new contract	Mark , Milne Associates			No
Potential New Deal	Jemma Jones , Liberty Jones			No
	Paul Young , Young Designs			No
Possible New Deal Rental - 3 machines	Jason King , King Copiers			No
Email new brochures	Duncan McCreddie , Hope Works			No
New product range	John West , Hope Works			Yes
Email updated copier price list	Duncan McCreddie , Hope Works			No
Mr Lovely from Lovely Test Customer, which is a Platinum customer, has a rank call due today, 15 Oct 2019.	Mr Lovely , Lovely Test Customer			No
Client upgrading machines	Josh Meyers , Bits and Bytes			Yes
Client upgrading machines	Josh Meyers , Bits and Bytes			Yes

Annotation 1 points to the 'Is Pipeline Case' column of the 'Client upgrading machines' row. Annotation 2 points to the 'More Actions' menu icon (a square with a pencil, info, calendar, checkmark, and trash) for the same row.

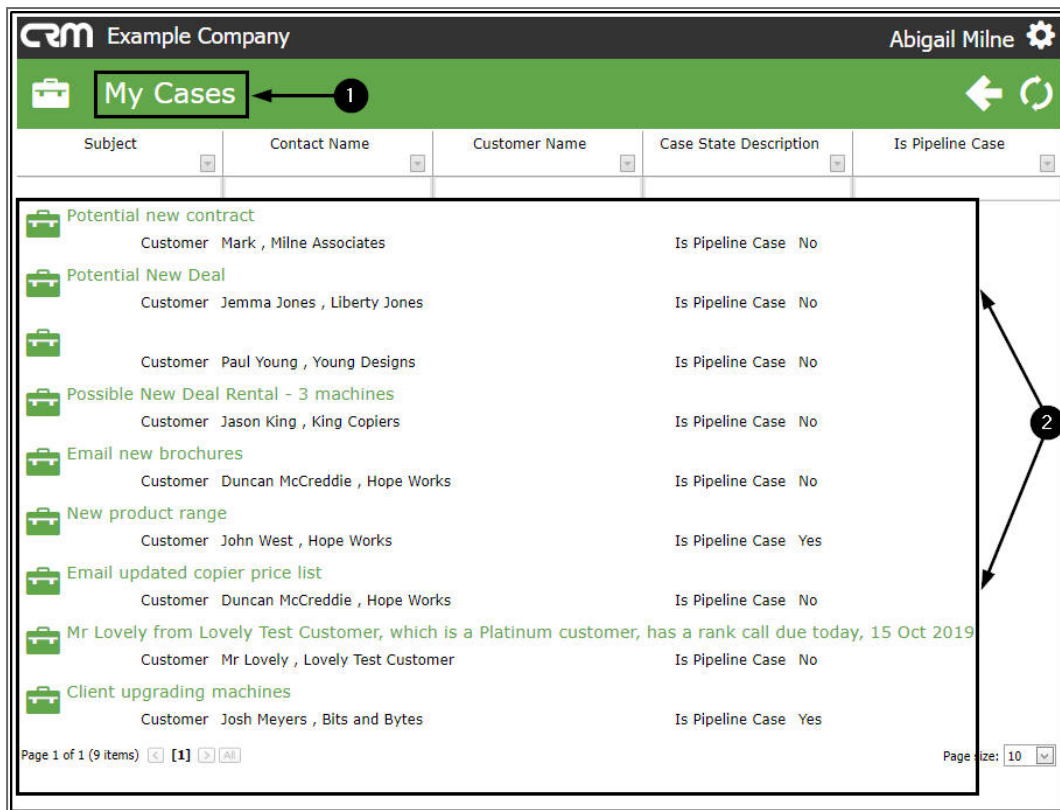
1. A message box will pop up asking:
 - ***Are you sure you want to mark this case as lost?***
2. Click on ***OK***.



1. The system will update the case state.
2. A **Case Lost** message with a **Trash Bin** image will briefly flash on the screen.



1. You will return to the **My Cases** screen.
2. The recently lost case will no longer be displayed in this list.



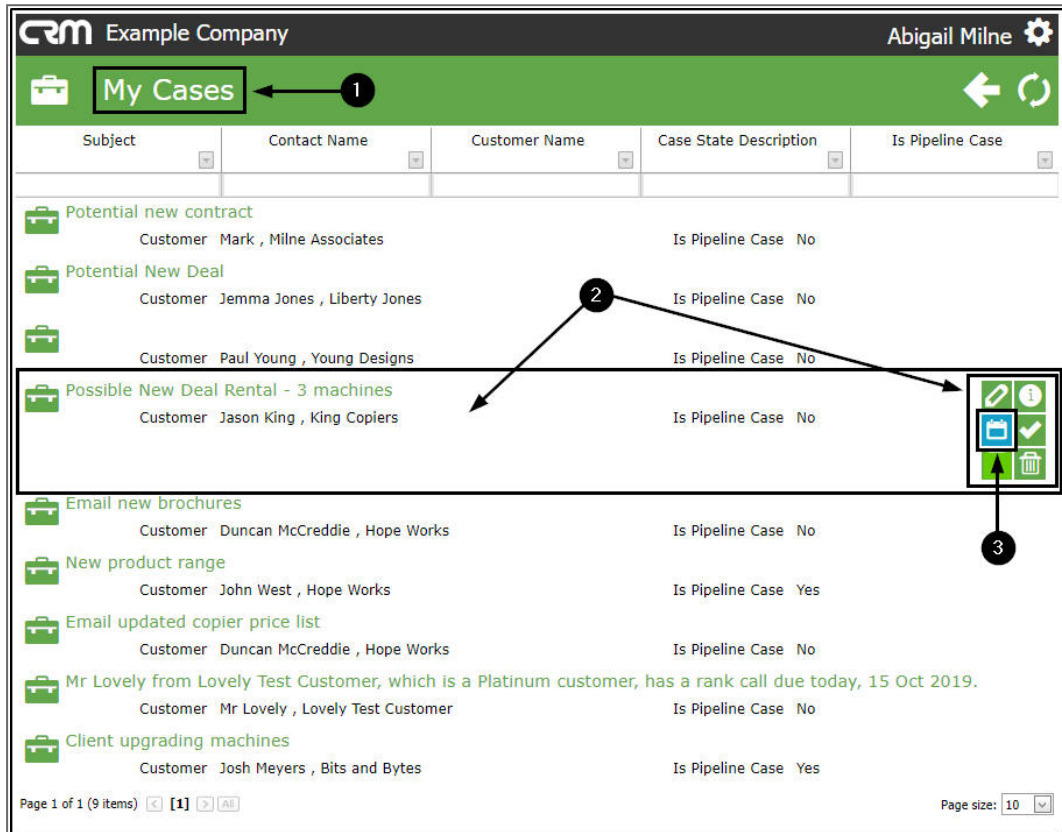
LINK A QUOTE TO CASE

1. From the (existing) **My Cases** page, you can link a Quote by navigating via the following **Action** buttons:

- **View Case Info and History**
 - The **Save Case** page will open, expand the **Quote** frame.
- **View/Edit this Case**
 - The **Save Case** page will open, expand the **Quote** frame.
- **New Activity**
 - The **Save Activity** page will open, expand the **Quote** frame.

For the purpose of this manual we will navigate from the **Save Activity** page but the **link quote process** is the same from *either* page.

2. Hover anywhere over a Case to display the **Action Items** buttons.
3. Click on the **New Activity** button.



1. The **Save Activity** page will be displayed.

In this particular page, before moving down to the **Quotes** frame, the following mandatory fields must be filled in:

2. **Type:** Click in this field to display an **Activity Type** drop-down list. Select from this list the applicable type (e.g. Email).
3. **Subject:** Type in the **Subject** of this activity (e.g. Email to discuss present client requirements and give overview of new product range).

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The 'Save Activity' form includes the following sections:

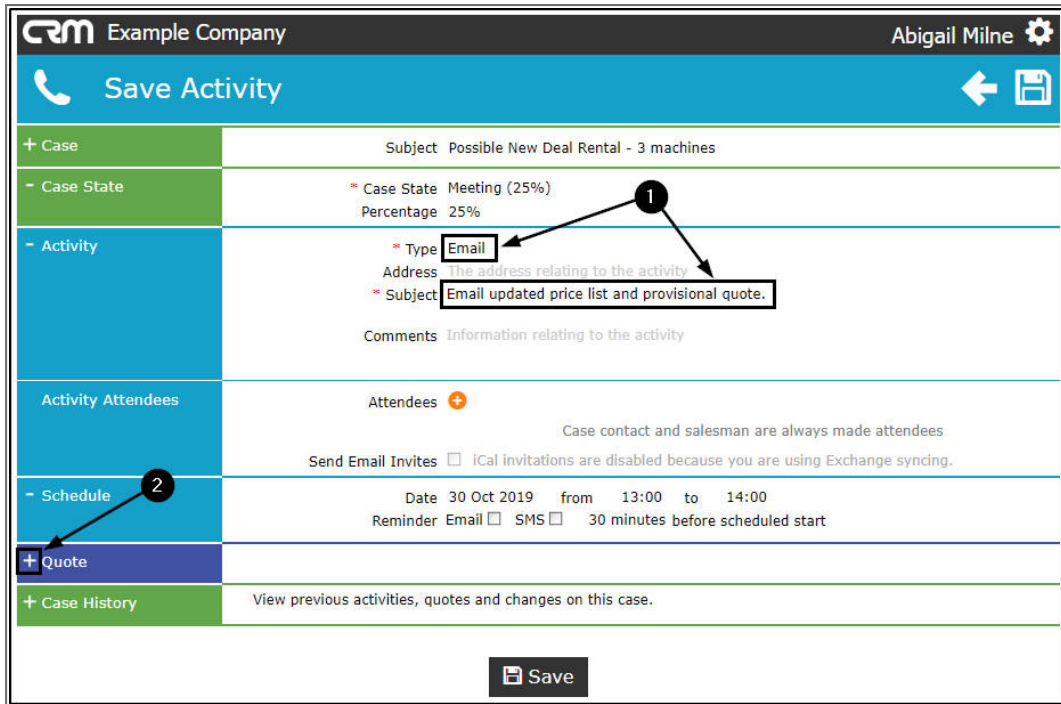
- Case:** Subject: Possible New Deal Rental - 3 machines
- Case State:** * Case State: Meeting (25%), Percentage: 25%
- Activity:** * Type: Activity type (callout 2), Address: The address relating to the activity, * Subject: The subject of the activity (callout 3), Comments: Information relating to the activity
- Activity Attendees:** Attendees (+), Case contact and salesman are always made attendees, Send Email Invites: iCal Invitations are disabled because you are using Exchange syncing.
- Schedule:** Date: 30 Oct 2019 from 13:00 to 14:00, Reminder: Email SMS 30 minutes before scheduled start
- Quote:** (+)
- Case History:** View previous activities, quotes and changes on this case.

A 'Save' button is located at the bottom of the form.

1. When you have filled in the mandatory fields,

LINK QUOTE PROCESS

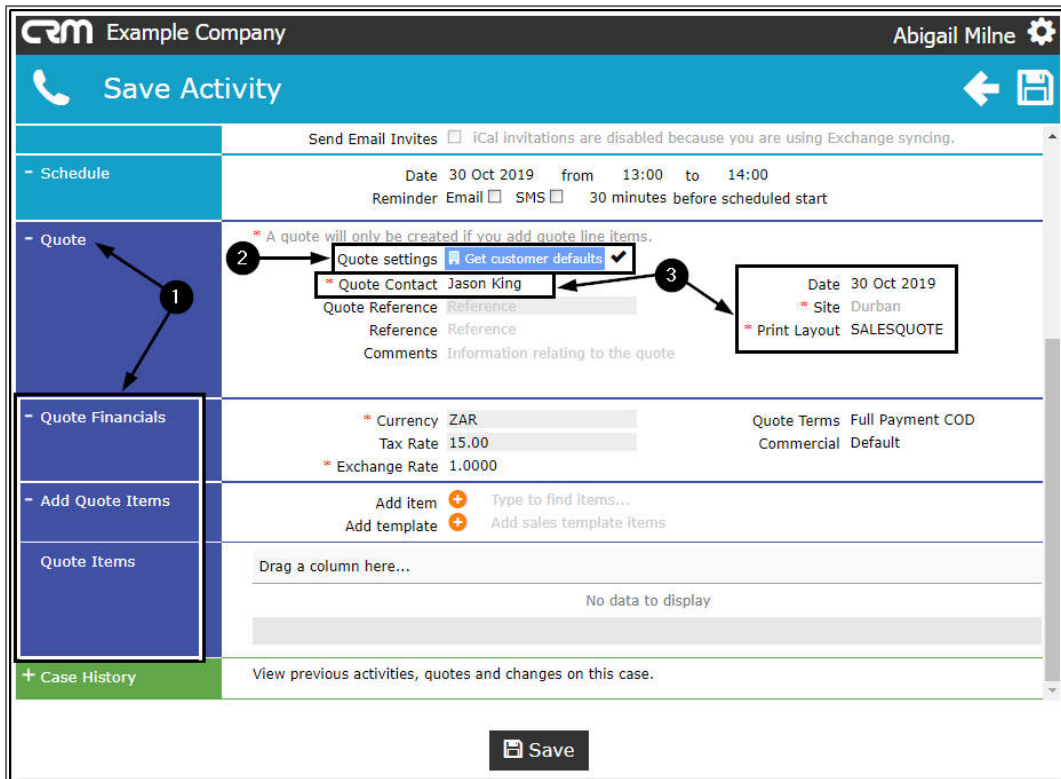
2. Click on the *expand* icon in the *Quote* frame.



1. The **Quote** section will be expanded to expose the:
 - **Quote Financials**
 - **Add Quotes Items**
 - and **Quote Items** frames.
2. **Quote Settings:** As the Quote section is expanded, the system will pull through the customer default information and populate the following fields:
3. **Quote Contact:** This will populate with the contact selected in the Case section.
 - You can click on the drop-down arrow and select an alternative contact from the drop-down list, if required.
4. **Date:** This will populate with the current date.
 - You can either type directly in this field to change the date, or click on the drop-down arrow and use the calendar function to select an alternative date if required.
5. **Site:** This will auto populate with the site set up on the customer. If the Customer is linked to more than one site, there will be an active **drop-**

down arrow - you can click on this and select the correct site from the list displayed.

6. **Print Layout:** This will auto populate with *Sales Quote*.

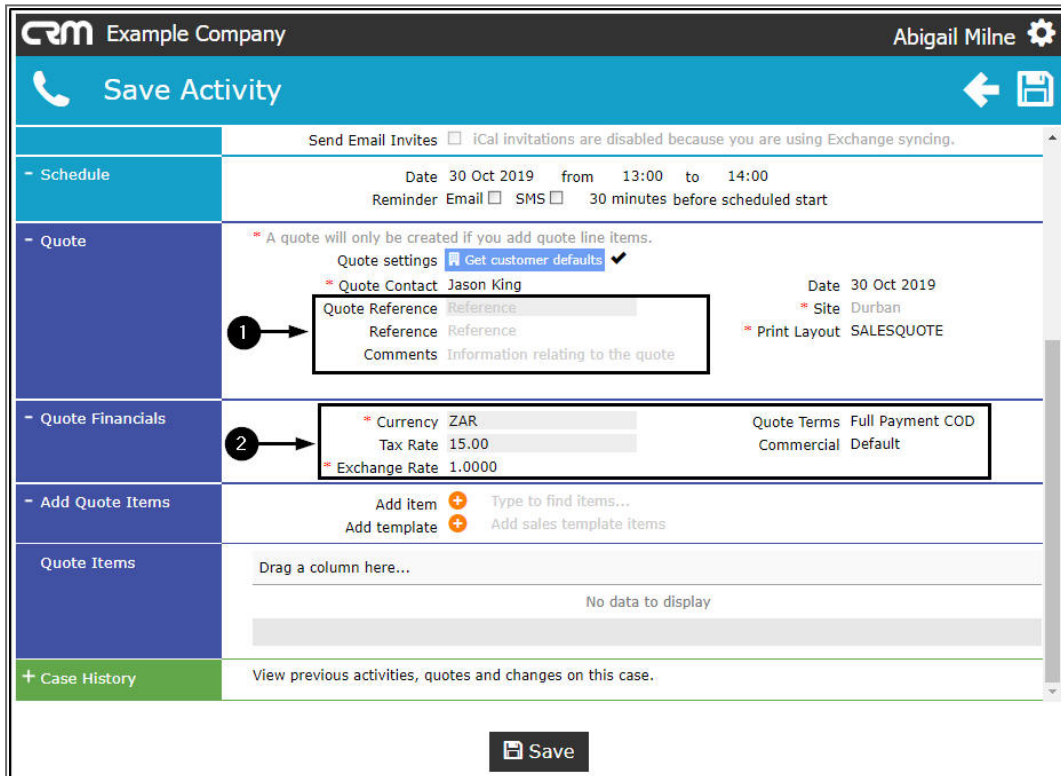


1. **Quote Reference:** The system will allocate a reference number as the quote is saved.
2. **Reference:** Type in a reference for this quote.
3. **Comments:** Type in a comment/additional information relating to this quote.

QUOTE FINANCIALS

2. **Currency:** This will auto populate with the currency set up on the customer. You can click on the drop-down arrow and select an alternative currency, if required.

3. **Tax Rate:** This will auto populate with the tax rate set up on the customer.
4. **Exchange Rate:** This will auto populate with the exchange rate set up on the customer.
5. **Quote Terms:** This is the quote repayment factor and should be configured in **Static Data: Sales Quote Terms or Repayment Method** This will auto populate with Full Payment COD.
 - You can click on the drop-down arrow and select an alternative payment period, if required.
6. **Commercial:** This will auto populate with the **commercial** set up on the customer.
 - You can click on the drop-down arrow and select an alternative commercial, if required.



ADD QUOTE ITEMS

You now have the ability to add single items to a quote.

Note: For Part Numbers to pull through to this list - you need to ensure that the **Quote Products are specified** .

- In the **Add item** field, start typing the **code** or **description** of the item you wish to link to this quote.

The screenshot shows the CRM interface for adding quote items. The 'Add Quote Items' section has a search field with the placeholder text 'Type to find items...'. Below this field, there is a 'Quote Items' section that currently displays 'No data to display'. The interface also includes sections for 'Quote' (with fields for Date, Quote Contact, and Quote Reference) and 'Quote Financials' (with fields for Currency, Tax Rate, and Exchange Rate). A 'Save' button is located at the bottom of the screen.

1. As you start typing in the field, a **Type**, **Code** and **Description** list of all items on the system, will be displayed.
2. The system will **filter** for the item that you are searching for.
3. Select the applicable **item** from this list.

CRM Example Company Abigail Milne

Save Activity

Case contact and salesman are always made attendees

Send Email Invites iCal invitations are disabled because you are using Exchange syncing.

- Schedule Date 30 Oct 2019 from 13:00 to 14:00
Reminder Email SMS 30 minutes before scheduled start

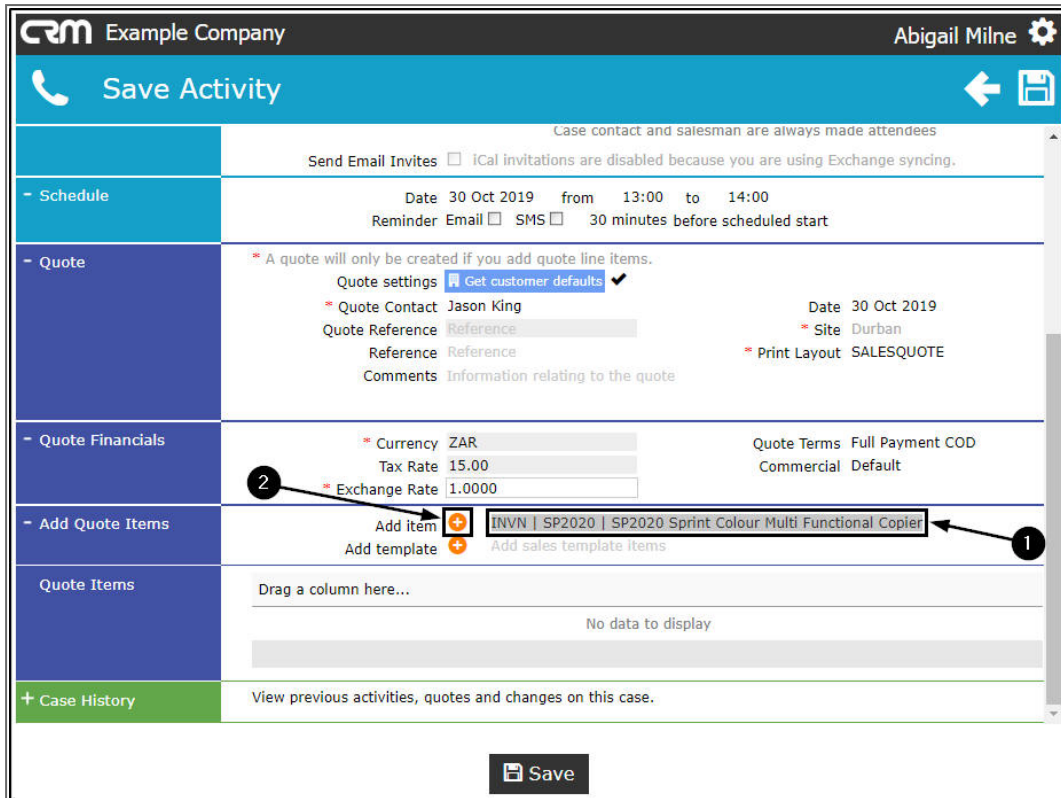
- Quote * A quote will only be created if you add quote line items.
Quote settings
* Quote Contact Jason King Date 30 Oct 2019
Quote Reference Reference * Site Durban
Reference Reference * Print Layout SALESQUOTE
Comments Information relating to the quote

- Quote Financials * Currency ZAR Quote Terms Full Payment COD
Tax Rate 15.00 Commercial Default
* Exchange Rate 1.0000

- Add Quote Items

Type	Code	Description	#
INVN	SP2020	SP2020 Sprint Colour Multi Functiona Copier	1
INVN	SP1818	Sprin copier	12
INVN	1458-96523	K147 Kyocera Colour Copier	13
INVN	KM250MFP	Konica Minolta Colour Multi-Functiona Copier	20
INVN	SP19-123456	SP19-12 Colour Copier	22
INVN	SP204	SP204 Colour Copier	26
INVN	SP1020	Copier	57

1. The selected item code and description will populate the **Add** item field.
2. Click on the **plus[+]** button.



1. The item will be added to the **Quote Items** frame.
2. You will note that there are **2** action buttons linked to this item.
 - An **Edit** button. This will enable you to edit the item details e.g. quantity, price, if required.
 - A **Delete** button. This will enable you to delete the item from the quote, if required.

EDIT QUOTE ITEM

3. Click on the **Edit** button.

The screenshot shows the 'Save Activity' form in a CRM system. The form is divided into several sections: 'Comments', 'Activity Attendees', 'Schedule', 'Quote', 'Quote Financials', 'Add Quote Items', 'Quote Items', and 'Case History'. The 'Quote Items' section contains a table with the following data:

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 Multi Functional Copier	1	5610.67	5400.00		5400.00	[Edit] [Delete]	6210.00	
				5610.67	5400.00	0.00	5400.00		6210.00	

Numbered callouts in the image indicate: 1 points to the 'Quote Items' section header; 2 points to the 'Case History' section; 3 points to the 'Actions' column in the table.

1. An **edit item** frame will be displayed.

Here you can make changes to the following details:

2. **Item Description**
 3. **Item Quantity**
 4. **Item Unit Cost**
 5. **Item Price**
6. Click on the **Apply Changes** icon [] to save your changes or the the **Cancel changes** icon [x] to cancel the changes, as required.

CRM Example Company Abigail Milne

Save Activity

Case contact and salesman are always made attendees

Send Email Invites iCal invitations are disabled because you are using Exchange syncing.

Schedule
 Date 30 Oct 2019 from 13:00 to 14:00
 Reminder Email SMS 30 minutes before scheduled start

Quote
 * A quote will only be created if you add quote line items.
 Quote settings Get customer defaults
 * Quote Contact Jason King Date 30 Oct 2019
 Quote Reference Reference * Site Durban
 Reference Reference * Print Layout SALESQUOTE
 Comments Information relating to the quote

Quote Financials
 * Currency ZAR Quote Terms Full Payment COD
 Tax Rate 15.00 Commercial Default
 * Exchange Rate 1.0000

Add Quote Items
 Add item Type to find items...
 Add template Add sales template items

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 Multi Functional Copier	1	5610.67	5400.00		5400.00		6210.00	<input type="checkbox"/>

Quote Items

Quote Item Description: SP2020 Sprint Colour Mu
 Suppress on Print:

Quantity: 2 Unit Cost: 5610.674500 Item Price: 5400.0000

			2	5610.67	5400.00	0.00	5400.00		6210.00	<input checked="" type="checkbox"/> <input type="checkbox"/>
--	--	--	---	---------	---------	------	---------	--	---------	--

+ Case History View previous activities, quotes and changes on this case.

Save

1. In this example, the **Quantity** has been updated to **2**.
2. The **Total** and **Total Inclusive** columns will update accordingly.

LINK ADDITIONAL QUOTE ITEMS

3. In the **Add item** field, start typing the **code** or **description** of the next item that you wish to add to the quote.

CRM Example Company
Abigail Milne

Save Activity

Comments Information relating to the activity

Activity Attendees

Attendees

Case contact and salesman are always made attendees

Send Email Invites iCal invitations are disabled because you are using Exchange syncing.

Schedule

Date 30 Oct 2019 from 13:00 to 14:00

Reminder Email SMS 30 minutes before scheduled start.

Quote

* A quote will only be created if you add quote line items.

Quote settings

* Quote Contact Jason King Date 30 Oct 2019

Quote Reference Reference * Site Durban

Reference Reference * Print Layout SALESQUOTE

Comments Information relating to the quote

Quote Financials

* Currency ZAR Quote Terms Full Payment COD

Tax Rate 15.00 Commercial Default

* Exchange Rate 1.0000

Add Quote Items

Add item

Add template Add sales template items

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 Multi Functional Copier	2	5610.67	5400.00		10800.00		12420.00	
							10800.00		12420.00	

+ Case History View previous activities, quotes and changes on this case.

Save

1. As you start typing in the field, the **Type**, **Code** and **Description** list will again be displayed.
2. The system will **filter** for the item that you are searching for.
3. Select the applicable **item** from this list.

CRM Example Company Abigail Milne

Save Activity

Comments Information relating to the activity

Activity Attendees Attendees Case contact and salesman are always made attendees

Send Email Invites iCal invitations are disabled because you are using Exchange syncing.

Schedule Date 30 Oct 2019 from 13:00 to 14:00
Reminder Email SMS 30 minutes before scheduled start

Quote Quote settings Get customer defaults
Quote Contact Jason King Date 30 Oct 2019
Quote Reference Reference Site Durban
Reference Reference * Print Layout SALESQUOTE
Comments Information relating to the quote

Quote Financials Currency ZAR Tax Rate 15.00 Exchange Rate 1.0000
Quote Terms Full Payment COD Commercial Default

Add Quote Items Add item Add template

Type	Code	Description	#
INVN	2020-147K	Black toner SP2020	2
INVN	SP19-147K	Black Toner SP1919	4
INVN	147-888544	K14 Black toner	14
INVN	12-098765	SP19-1 Black Toner	23
INVN	204-147K	SP20 Black Toner	27
INVN	147258	Black Toner	31
INVN	540-147K	Compatible black toner	55

Case History View previous activities, quotes and changes on this case.

Save

1. The additional item code and description will populate the **Add** item field.
2. Click on the **plus [+]** button.

CRM Example Company Abigail Milne

Save Activity

Case contact and salesman are always made attendees

Send Email Invites iCal invitations are disabled because you are using Exchange syncing.

Schedule Date 31 Oct 2019 from 11:00 to 12:00
Reminder Email SMS 30 minutes before scheduled start

Quote Quote settings Get customer defaults
Quote Contact Jason King Date 31 Oct 2019
Quote Reference Reference Site Durban
Reference KCQU101 * Print Layout SALESQUOTE
Comments Information relating to the quote

Quote Financials Currency South African Rand Tax Rate 15.00 Exchange Rate 1.0000
Quote Terms Full Payment COD Commercial Default

Add Quote Items Add item Add template

INVN | 2020-147K | Black toner SP2020

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 Multi Functional Copier	2	5610.67	5400.00		10800.00		12420.00	
				5610.67	5400.00	0.00	10800.00		12420.00	

Case History View previous activities, quotes and changes on this case.

Save

1. The additional item will be added to the **Quote Items** frame.
2. Edit the details, if required.
3. The quote **Total Inclusive** amount will update to include this item.

SAVE QUOTE (SAVE ACTIVITY)

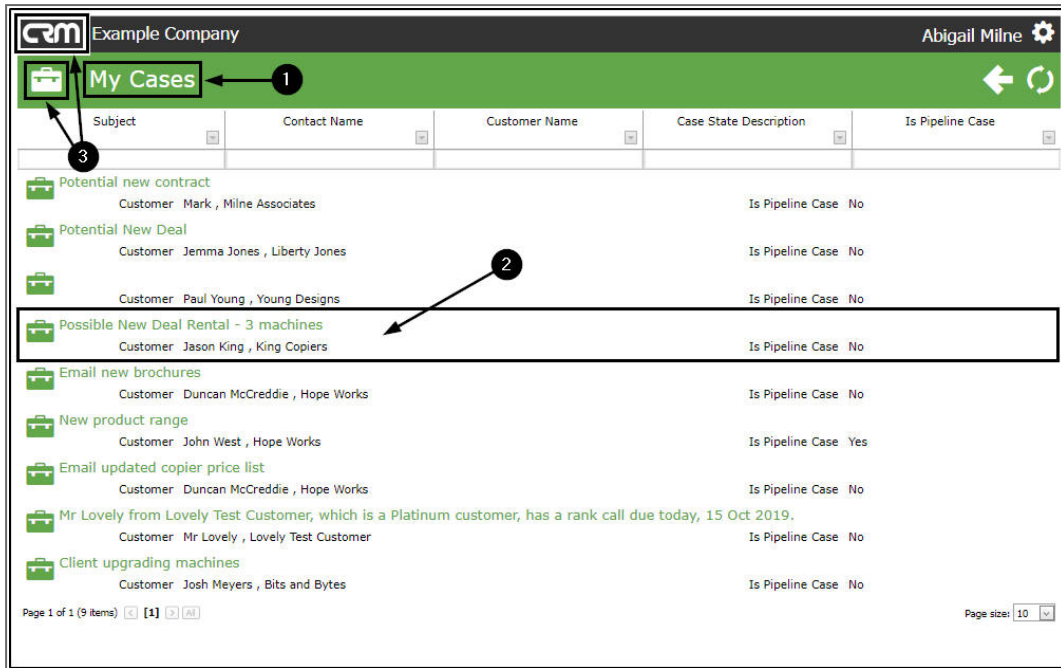
4. When you have finished adding items to the Quote sections, click on **Save**.

The screenshot shows the 'Save Activity' screen in a CRM system. The interface includes sections for Schedule, Quote, Quote Financials, Add Quote Items, and Quote Items. The Quote Items section contains a table with the following data:

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 Multi Functional	2	5610.67	5400.00		10800.00		12420.00	
INVN	2020-147K	Black toner SP2020	1	481.70	526.63	526.63	526.63		605.62	
				6092.37	5926.63	526.63	11326.63		13025.62	

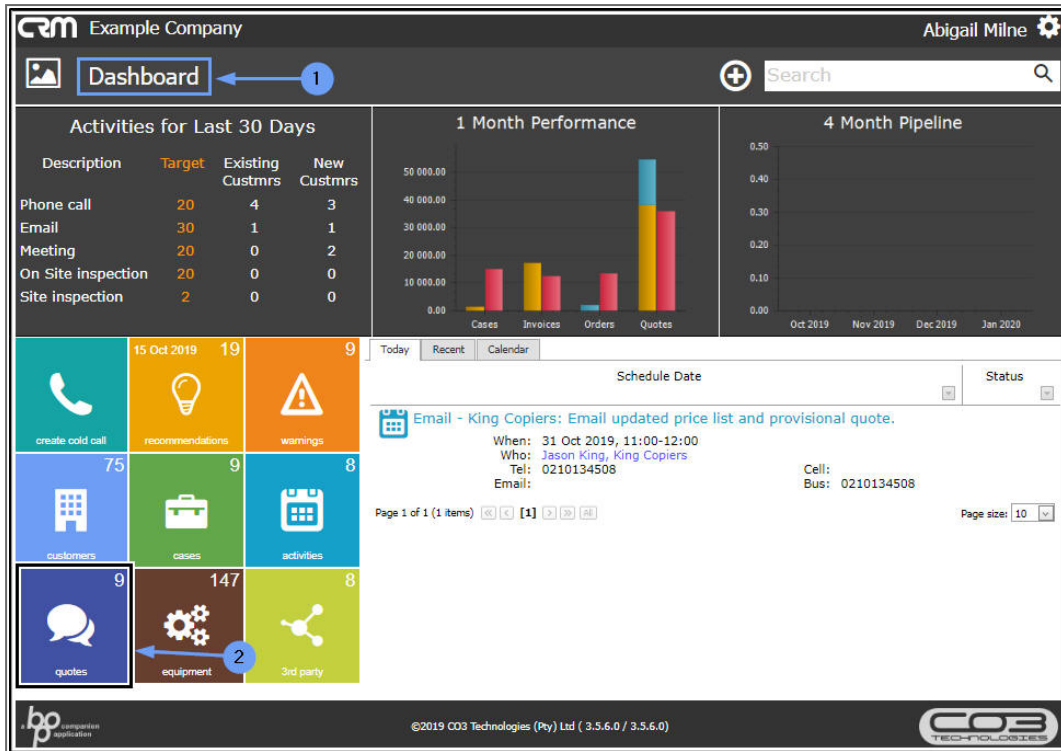
Numbered callouts in the image indicate: 1. The 'Add item' button; 2. A row in the 'Quote Items' table; 3. The 'Total Inclusive' column; 4. The 'Save' button at the bottom.

1. The quote details will be saved and you will return to the **My Cases** screen.
2. The case that you linked the quote to, can still be viewed in this list.
3. Click on the **Case** icon or **CRM** logo to return to the **Dashboard** (Home page).



VIEW QUOTE

1. In the *Dashboard* (Home page), you can navigate to the *Quotes* listing page to view the recently added quote.
2. Click on the *Quotes* tile.



1. The **Quotes** listing page will be displayed.
2. Here you can view the newly created quote.
3. You will note that the system has now allocated a **Quote Reference** number.

Note 1: Refer to **CRM Quotes** for more information on adding and editing quotes.

Note 2: Refer to **View / Print / Email the Quote** for Quote processing information.

4. Click on the **Quotes** icon or the **CRM** logo to return to the **Dashboard** (Home page).

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	New quote	Yes
QT0000210	HOP001	Hope Works	HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000211	KIN0002	King Enterprises	Q/KE/001	6815.62	ZAR	19 Jul 2019	Accepted quote	Yes
QT0000212	KIN0001	King Copiers	Q/KC/9002	13025.62	ZAR	30 Jul 2019	New quote	Yes
QT0000213	TRA0001	Training Wheels	TW001	31050.00	ZAR	14 Oct 2019	Accepted quote	Yes
QT0000214	HOP001	Hope Works		18630.00	ZAR	24 Oct 2019	New quote	No
QT0000215	KIN0001	King Copiers	KCQU101	13025.62	ZAR	31 Oct 2019	New quote	No

VIEW CUSTOMER-SPECIFIC CASE LIST

(from the [Customer Homepage](#))

You can also access your customer-specific list of Cases from the **Customer Homepage**. You will first need to navigate to a particular Customer Home page.

1. In the **Homepage**,
2. Click on the **Customers** tile.

The screenshot shows a CRM dashboard for 'Example Company' with the user 'Abigail Milne'. The dashboard includes a navigation menu with 'Dashboard' selected, a search bar, and several data visualization components:

- 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	4	3
Email	30	1	1
Meeting	20	0	2
On Site inspection	20	0	0
Site inspection	2	0	0
- 1 Month Performance:** A bar chart showing values for Cases, Invoices, Orders, and Quotes.
- 4 Month Pipeline:** A line chart showing a trend over time from Oct 2019 to Jan 2020.
- Dashboard Tiles:** A grid of tiles for 'create cold call', 'recommendations', 'warnings', 'customers' (75), 'cases' (9), 'activities' (8), 'quotes' (9), 'equipment' (147), and '3rd party' (8). The 'customers' tile is highlighted with a blue border and a '1' in a circle.
- Email Detail View:** A view for an email titled 'Email - King Copiers: Email updated price list and provisional quote.' with details for 'When', 'Who', 'Tel', 'Email', 'Cell', and 'Bus'.

1. The **Customers** listing page will open.
2. You can use the **Page Reference field** ,
3. the **Filter Row** or the
4. **Filter Text Box** to search for your customer.
5. Click on the selected customer icon in the **View** column.

The screenshot shows a CRM interface for 'Example Company' with the user 'Abigail Milne'. The main navigation bar has a 'Customers' tile (1) and a search bar (4). Below the search bar is a table of customer records. The table has columns: View, Customer, Code, Contact, Contact phone, Contact email, Comple, Status, Rank, Active, and Call Contact. The table lists 10 customers, with 'King Copiers' (KIN0001) highlighted by a box and an arrow (5). At the bottom, there is a pagination control (2) showing 'Page 4 of 8 (74 items)' and a 'Page size: 10' dropdown.

View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
?	Hope Works	HOP001	Duncan McCreddie	098 765 432	d.mccreddie@noem	91%	Active	Platinum	Yes	Yes
?	IT Supplies	ITS0001				8%	Active		No	No
?	Joes Carpentry Shop	JOE0001	Mary Watson	031 123 456		50%	New - CRM	Gold	No	Yes
?	Judes Jewels	JUD0001				8%	New - CRM	Silver	No	No
?	Just In Time	JUS001				16%	Active		Yes	No
?	King Copiers	KIN0001	Jason King	0210134508		58%	Released	Bronze	No	Yes
?	King Enterprises	KIN0002	Lucy Rowe			50%	Active	Silver	No	Yes
?	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	Active	Silver	No	Yes
?	Little Bee Honey	LIT0001	John Ginseng	031 123 456		66%	Active	Silver	No	Yes
?	Lovely Test Customer	LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes

1. The selected *Customer Homepage* will open.
2. Click on the *Cases* tile.

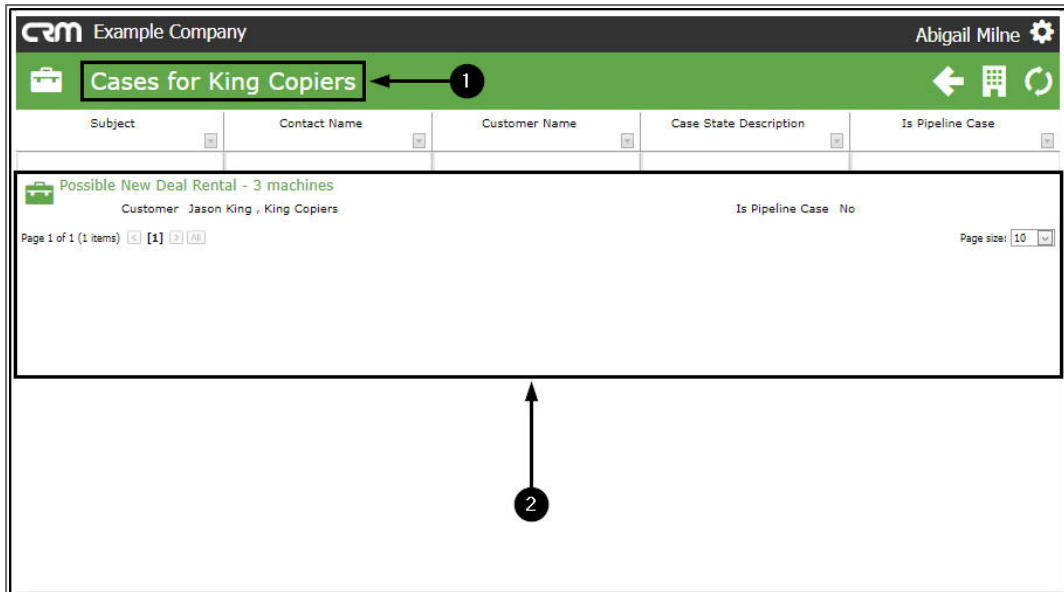
The screenshot shows a CRM dashboard for 'King Copiers' (KIN0001). At the top, there's a search bar and a user profile for 'Abigail Milne'. The main dashboard is divided into several sections:

- 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	4	3
Email	30	1	1
Meeting	20	0	2
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 from Oct 2019 to Jan 2020. The Y-axis ranges from 0.00 to 50,000.00.
- 4 Month Pipeline:** A line chart showing the pipeline from Oct 2019 to Jan 2020. The Y-axis ranges from 0.00 to 0.50.
- Navigation Menu:** A grid of icons for various CRM functions like 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The 'cases' icon is highlighted with a red box and a '2' callout.
- Customer Profile:** Details for 'King Copiers - KIN0001', including Trading Name, Registered Name, Description, VAT No, Rank (Bronze), Website, and Phone. A '58%' completion indicator is shown.
- 12 Months Sales History:** A line chart showing sales 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).

1. The **Cases for [selected customer]** page will open.
2. A list of Cases pertaining to that customer will display (where you have Cases pending).

In this example, there is only **1** Case linked to this customer.



1. Hover anywhere over an open Case, where you are the Salesman, to reveal the Case **Action** buttons.
2. You can link a Quote in this page via the following Action buttons:
 - **View Case Info and History**
 - **View/Edit this Case**
 - **New Activity**
3. **Single click** on any Case (open or closed) to access a **summary** of the Case information and if it is an open Case, the **Action** buttons will also display. (The Action buttons will not display for Closed Cases.)
4. You will note that there is a **New Quote** Action button in this page (not available in the **My Cases** listing page).
 - This will navigate you to the Save Quote screen - where you can also **add a new Quote** for this customer, if required.

For more information refer to [CRM Customers: Cases](#).

5. Click on the **Case** icon to return to the **Homepage**.

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main heading is 'Cases for King Copiers'. Below it is a table with columns: Subject, Contact Name, Customer Name, Case State Description, and Is Pipeline Case. A callout '5' points to the 'Subject' column. A callout '3' points to the 'Case State Description' column. A callout '2' points to a toolbar with icons for edit, delete, and other actions. A callout '4' points to a specific case entry. A callout '1' points to a detailed view of a case.

Possible New Deal Rental - 3 machines

Customer	Jason King - King Copiers	Is Pipeline Case	No
Case Value	0.00	Case State	Meeting
Relative Value	0.00	Percentage	25.00 %
Case Date	21 Jun 2019	Expected Completion	21 Jul 2019

Page 1 of 1 (1 items) [1] [2] [3]

CRM.000.012