CRM BASICS

DASHBOARD SETTINGS OPTIONS

CRM is designed with the Salesman in mind. All information viewed is specific to the user that is logged in. This user, sees only his/her Customers, Cases, Activities, Pipeline, etc. and can plan accordingly.

SETTINGS OPTIONS OVERVIEW

You can open the Settings frame to access **4** different settings Options:

Show items for subordinates

- If you are a Sales Manager, you can view your team's information by selecting **Show items for subordinates** in the Dashboard (Home page). Your team is defined by the employee hierarchy / Organisational Chart in BPO2. Each employee within the sales team needs to have their sales manager set up as Manager when adding or editing an employee.

Exclude deleted customers in search on Cold Call screen

- Selecting this option means that only **Active** customers will display in the selection lists when you are doing a search for a customer or contact.

Hide dashboard panel

- Selecting this option will hide the Dashboard panel in both the Home page and the Customer Home page, giving more space to view other details in both of those pages.

Hide dashboard panel on customer page

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- Selecting this option will only hide the Dashboard panel in the Customer Home page, giving more space to view other details in this page.

Ribbon Access: *Webpage > http://[servername]:[port-no]/BPOCRM/User.aspx*

SHOW ITEMS FOR SUBORDINATES

1. In the ***Home*** page (Dashboard),
2. Note the figures in the ***Activities for Last 30 Days*** frame and the bar graph amounts in the ***1 Month Performance*** frame and the ***4 Month Pipeline*** frame.
3. ***Hover over*** or click on the ***User Name*** or ***Settings*** icon

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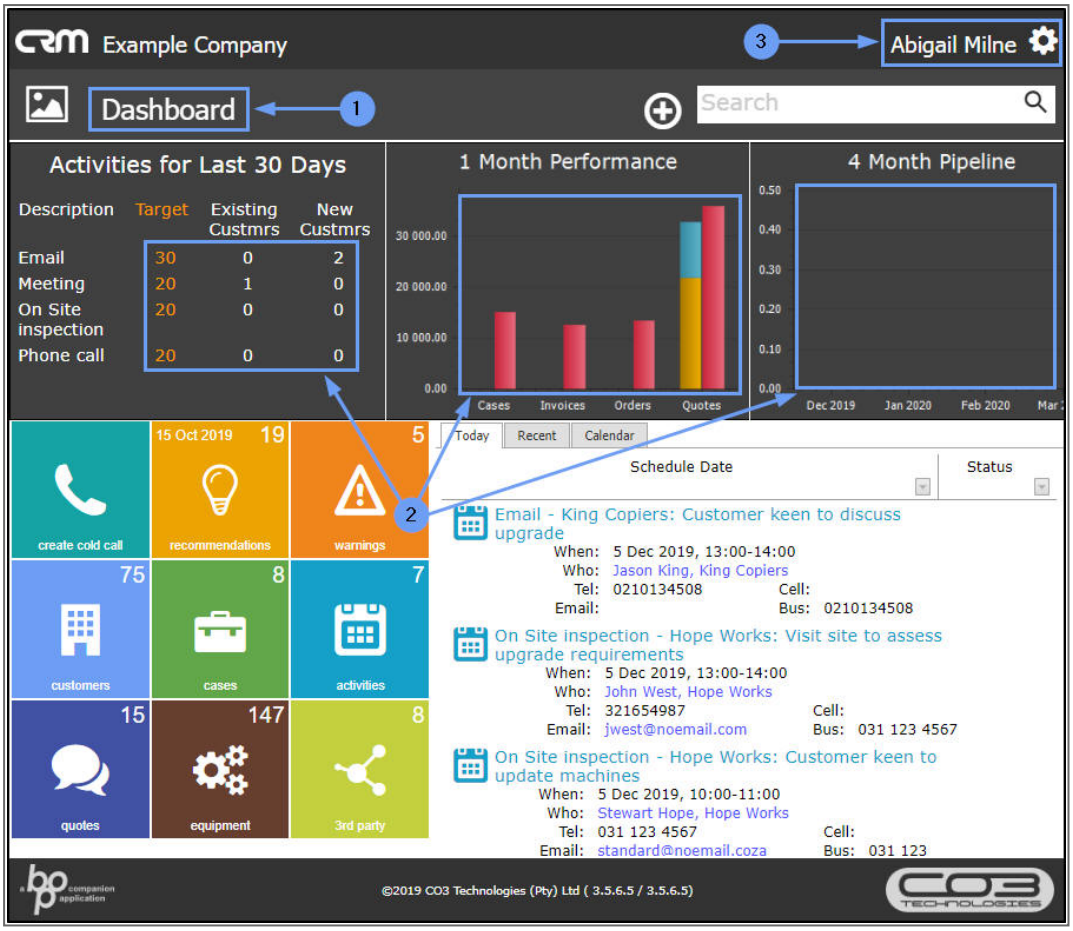

1. The ***Settings*** frame will expand and the
2. ***Options*** list will be displayed.
3. Select the ***Show items for subordinates*** check box.

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1. As you select the check box,
2. The 3 Dashboard frames:
    i. **Activities for the Last 30 Days**
    ii. **1 Month Performance**
    iii. **4 Month Pipeline**

    will automatically refresh.

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Click anywhere outside of the expanded Settings frame to collapse it.

1. The figures in the 3 Dashboard frames:
    i. **Activities for the Last 30 Days**
    ii. **1 Month Performance**
    iii. **4 Month Pipeline**

    will now include the subordinates statistics.

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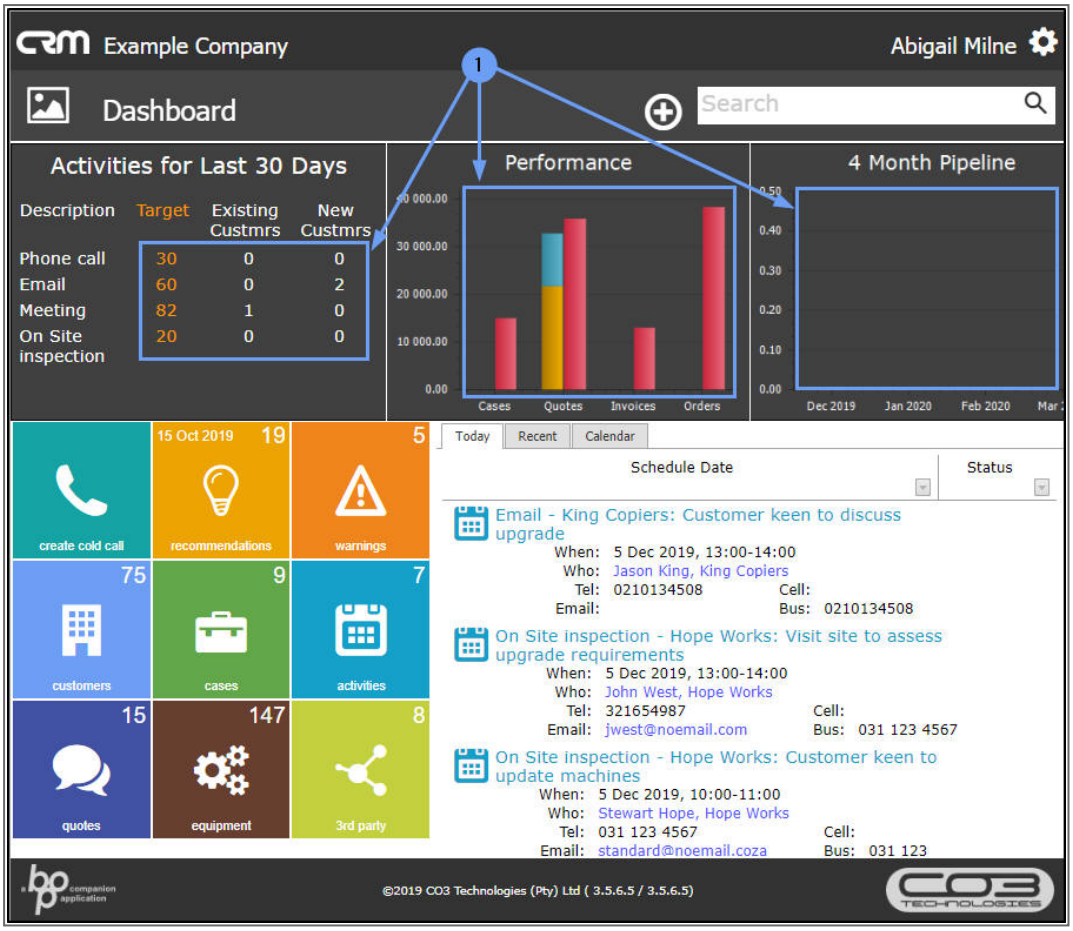

EXCLUDE DELETED CUSTOMERS ON COLD CALL SCREEN

This will show only the Active customers when you are doing a search for a customer or contact.

1. In the ***Home*** page,
2. ***Hover over*** or click on the ***User Name*** or ***Settings*** icon to display the ***Settings*** frame.
3. In the ***Options*** list, select the ***Exclude deleted customers in search on Cold call screen*** check box.

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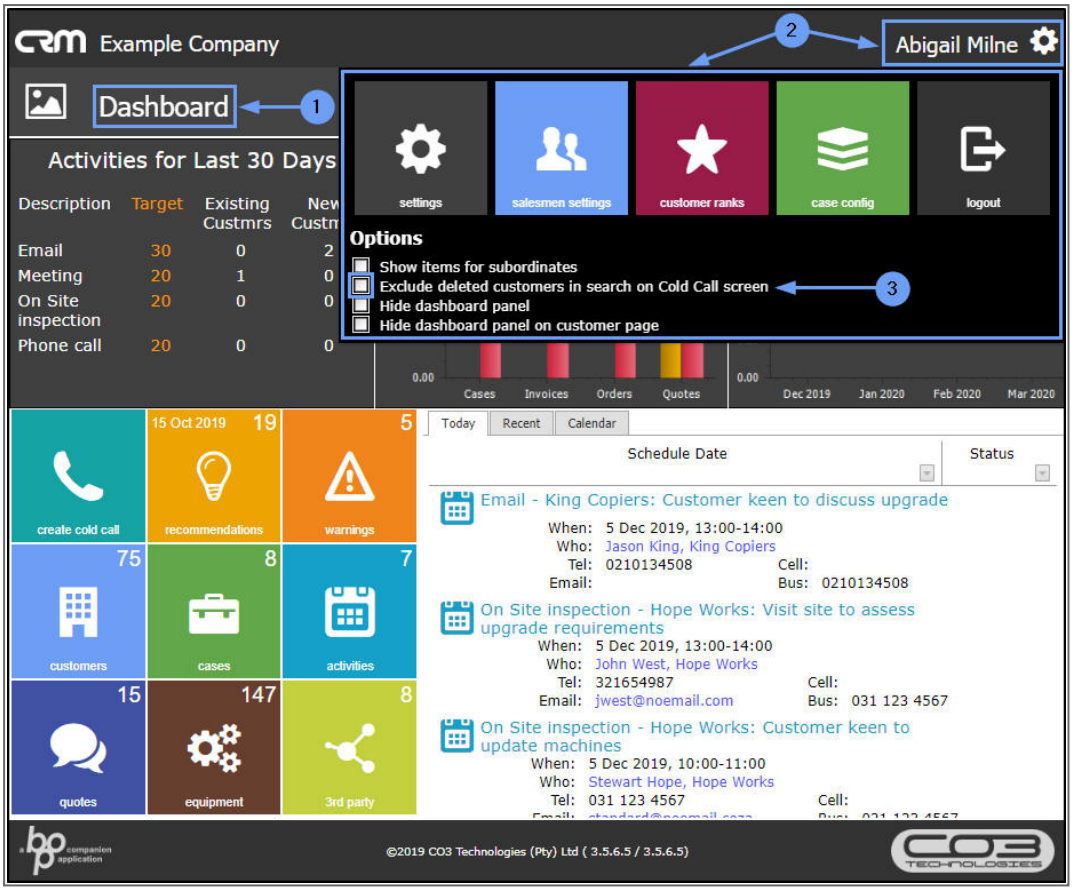

View the results of this selection here...(tba)

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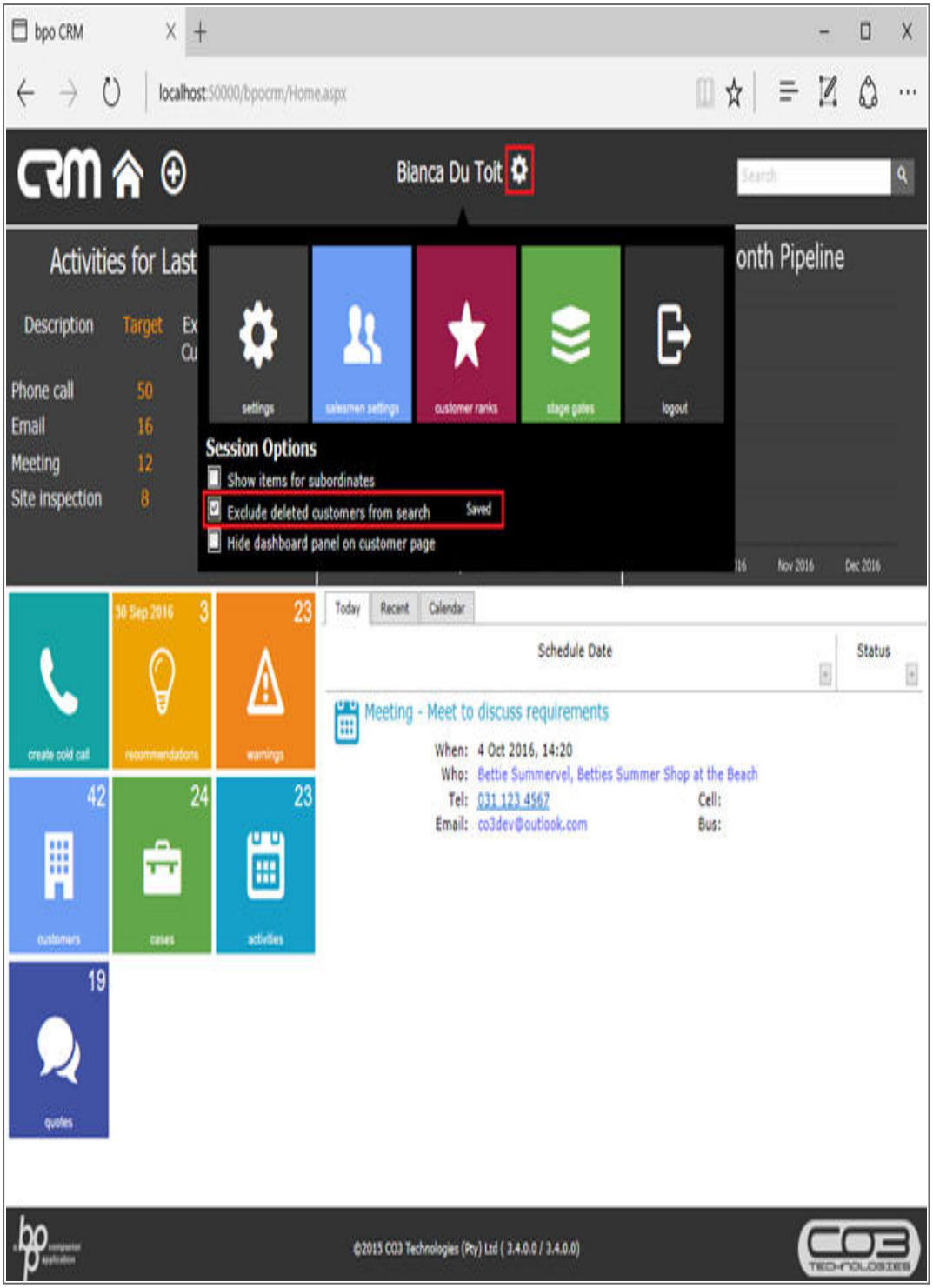

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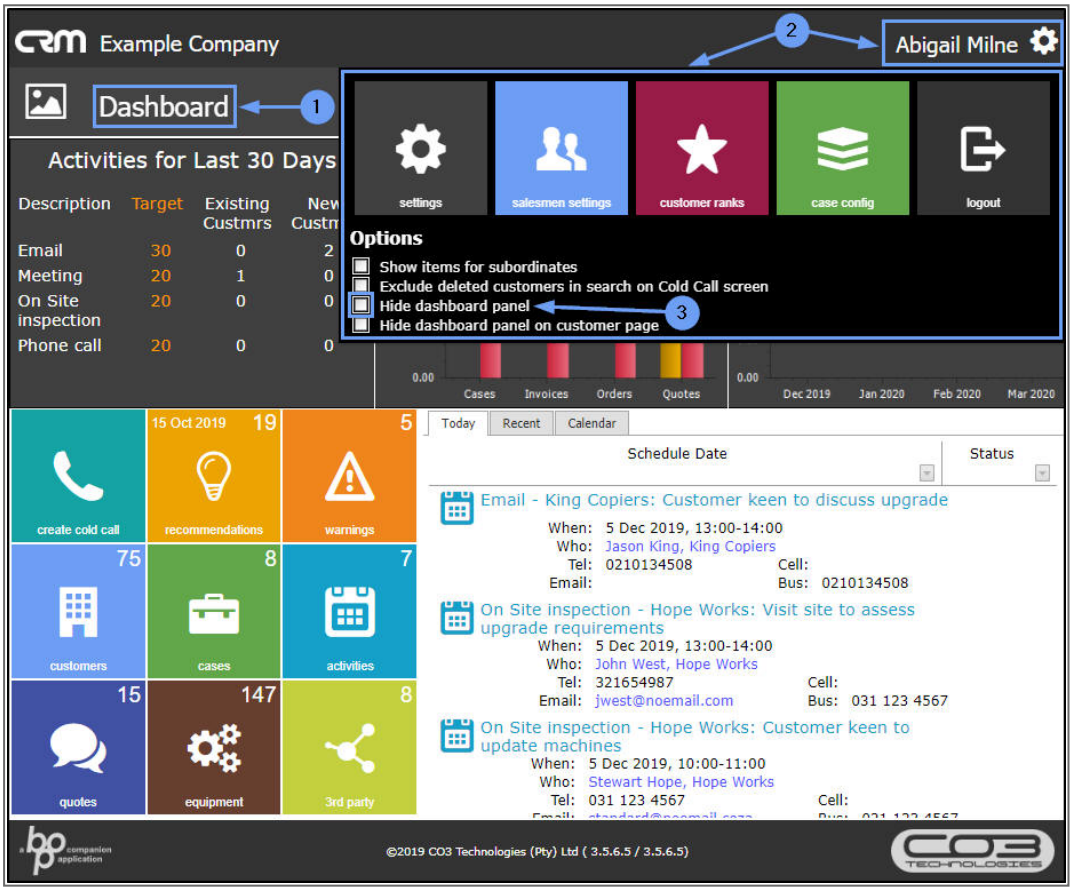
HIDE DASHBOARD PANEL

Hiding the Dashboard panel will give you more space to view the details on your Home page and Customer Home page.

1. In the ***Home*** page (Dashboard),
2. Hover over or click on the ***User Name*** or ***Settings*** icon to display the ***Settings*** frame.
3. In the ***Options*** list, select the ***Hide Dashboard panel*** check box.



1. The Dashboard will be removed from the Home page.
2. Click anywhere outside of the Settings panel to collapse it to view the Home page fully.

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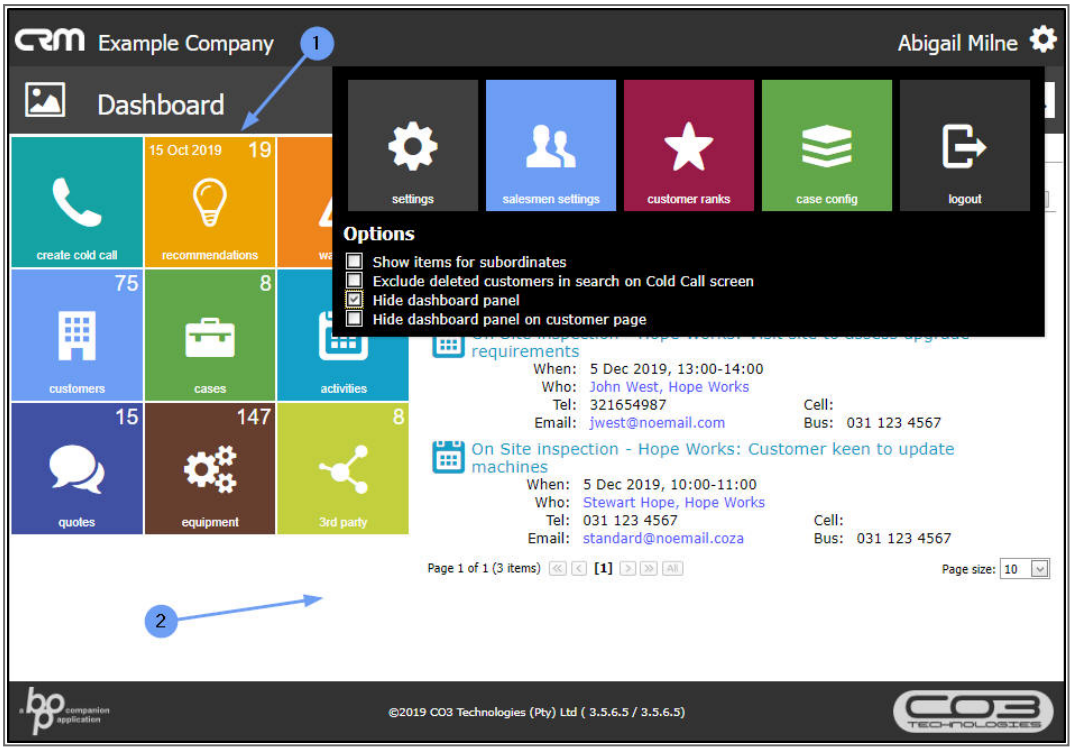
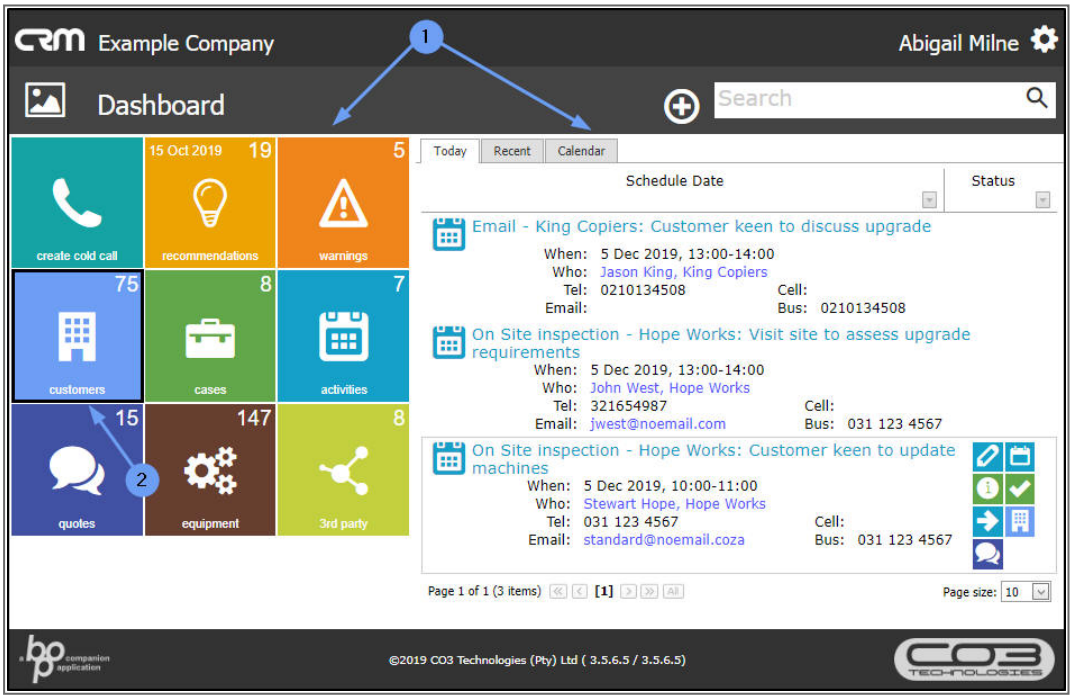


1. You can now view the Home page without the Dashboard.
2. Click on the ***Customers*** tile.



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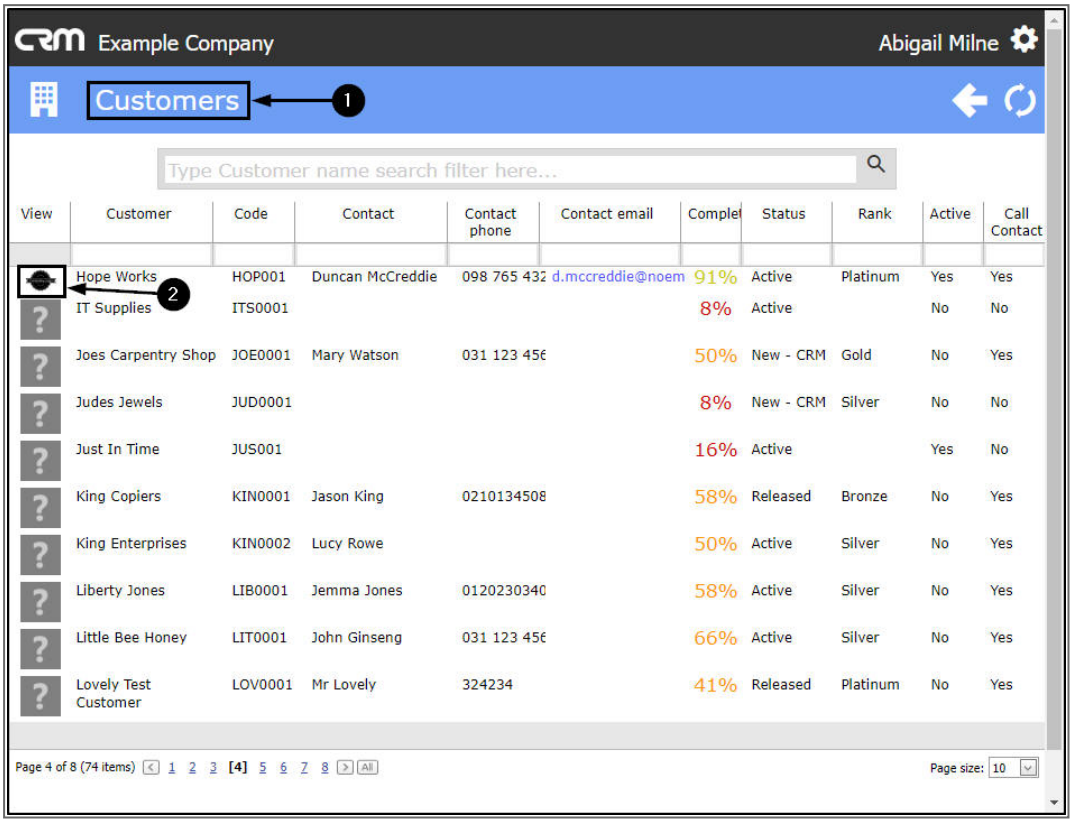
1. The ***Customers*** listing page will open.
2. Select any Customer by clicking on the ***Customer icon*** in the ***View*** column.



View	Customer	Code	Contact	Contact phone	Contact email	Complet	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

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1. The selected ***Customer Home*** page will open.
2. The Dashboard will also be hidden in this page.

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RE-INSTATE THE DASHBOARD VIA CUSTOMER HOME PAGE

The process to ***re-instate*** the Dashboard is the same from either the ***Home page*** or ***Customer*** Home page. For the purpose of this manual we explain the process from the ***Customer*** Home page.

1. In the ***Customer*** Home page,
2. Hover over or click on the ***User Name*** or ***Settings*** icon.

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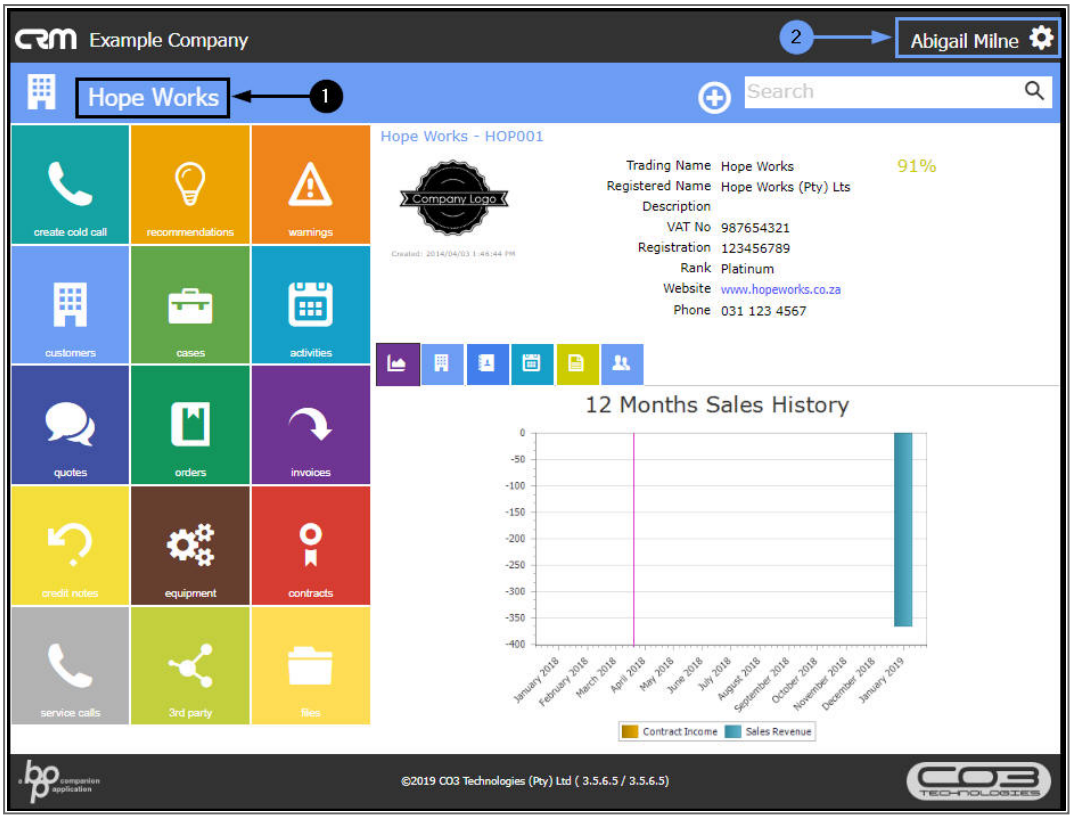

1. The ***Settings*** frame will be displayed.
2. ***Deselect*** the ***Hide Dashboard panel*** check box.

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1. As you deselect the Hide Dashboard panel option,
2. A message box will pop up in the Settings panel advising you to
    - ***Refresh page to show dashboard.***

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- ***Refresh*** the page.

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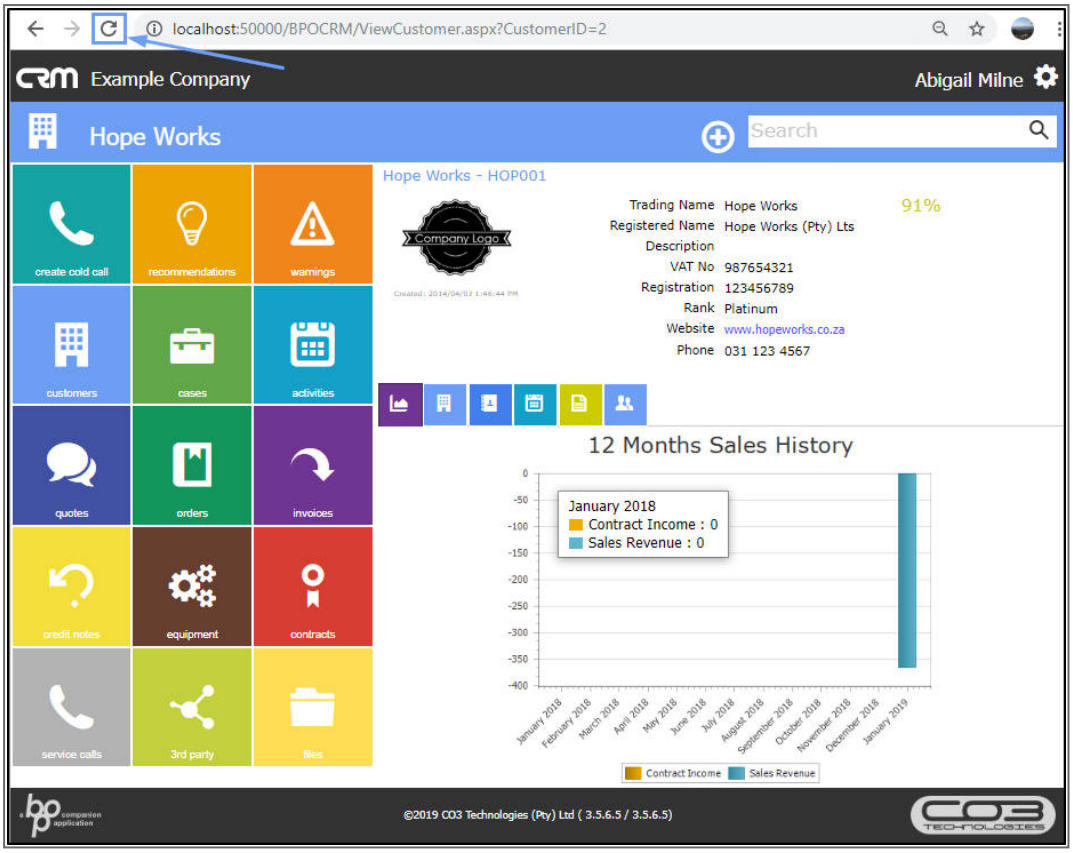

1. The Dashboard panel can now be viewed in the Customer Home page.
2. Click on the ***CRM logo*** to return to the ***Home*** page.

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1. The Dashboard panel can also now be viewed in the ***Home*** page again.

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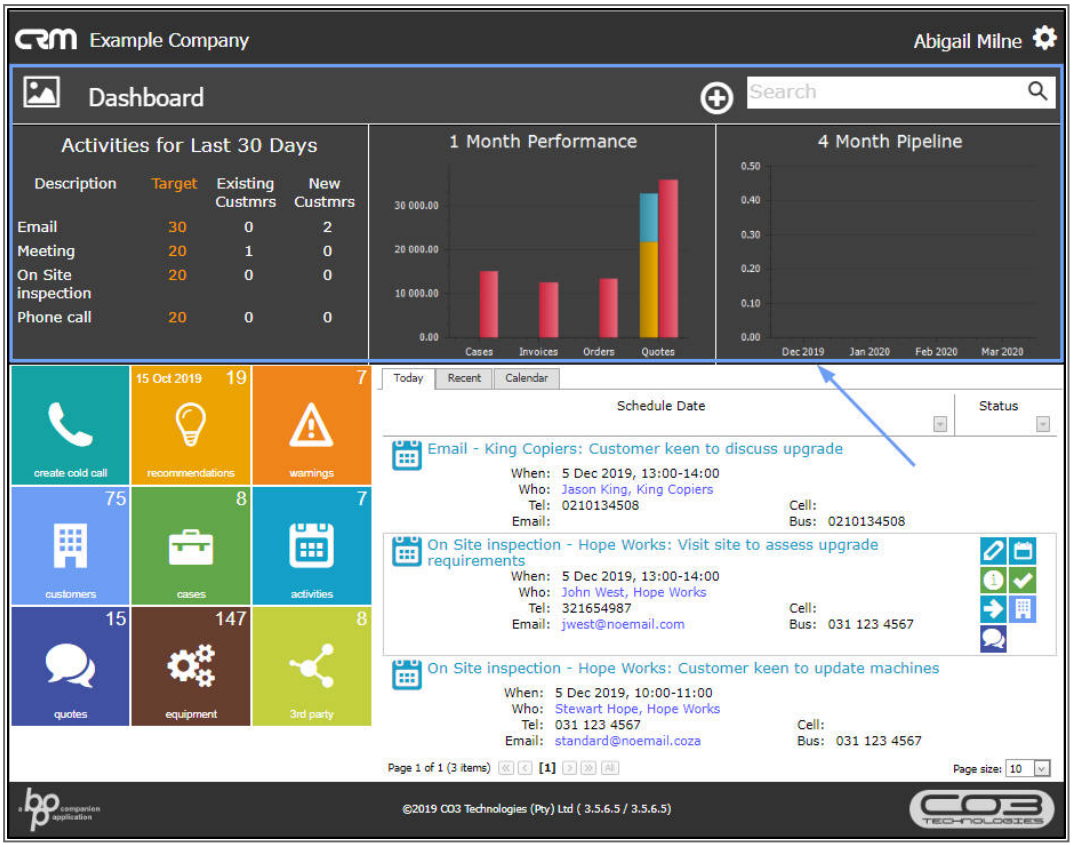

HIDE DASHBOARD PANEL ON CUSTOMER PAGE

Hiding the Dashboard panel on the Customer Home page will give you more space to view the details in this page. This selection will not hide the Dashboard panel on the Home page.

You can select this setting option *either* from the ***Home*** page *or* from the ***Customer Home*** page.

SELECT OPTION FROM HOME PAGE

1. In the ***Home*** page,
2. Hover over or click on the ***User Name*** or ***Settings*** icon to display the ***Settings*** frame.

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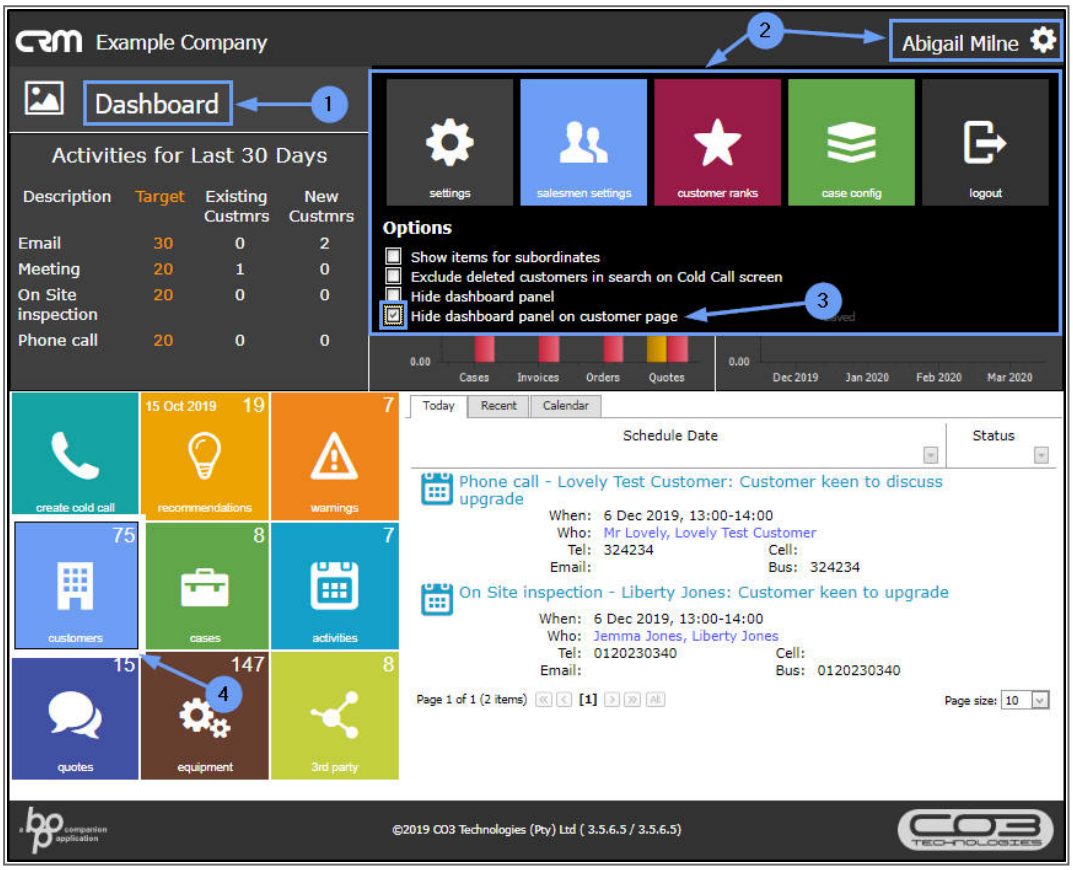
3. In the ***Options*** list, select the ***Hide dashboard panel on customer page*** check box.

   To see the result of this selection, you will need to navigate to a ***Customer Home*** page.

4. Click on the ***Customers*** tile.



1. The ***Customers*** listing page will open.
2. Click on any ***Customer icon*** in the ***View*** column.

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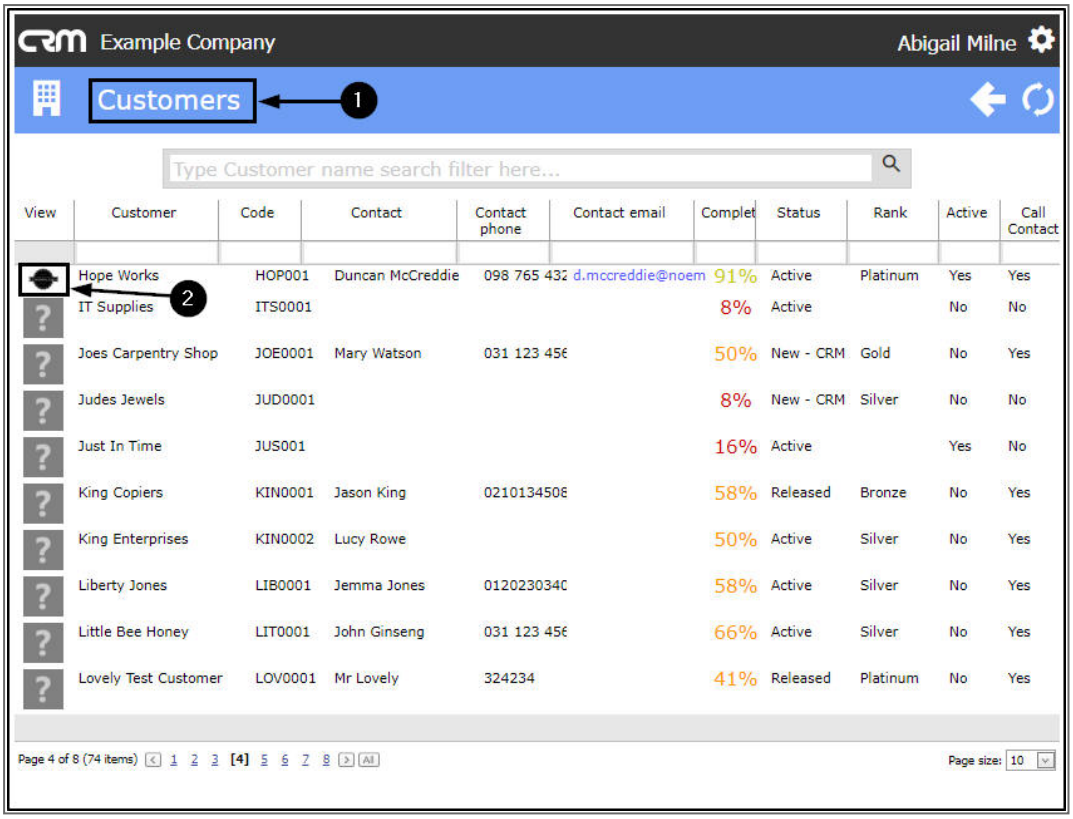

View	Customer	Code	Contact	Contact phone	Contact email	Complet	Status	Rank	Active	Call Contact
	Hope Works	HOP001	Duncan McCreddie	098 765 432	d.mccreddie@noem	91%	Active	Platinum	Yes	Yes
	IT Supplies	ITS0001				8%	Active		No	No
	Joes Carpentry Shop	JOE0001	Mary Watson	031 123 456		50%	New - CRM	Gold	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

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Page size: 10

1. The ***Customer Home*** page will open.
2. The Dashboard will be ***hidden*** in this page.
3. Click on the ***CRM logo*** to return to the Home page.

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SELECT OPTION FROM CUSTOMER HOMEPAGE

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

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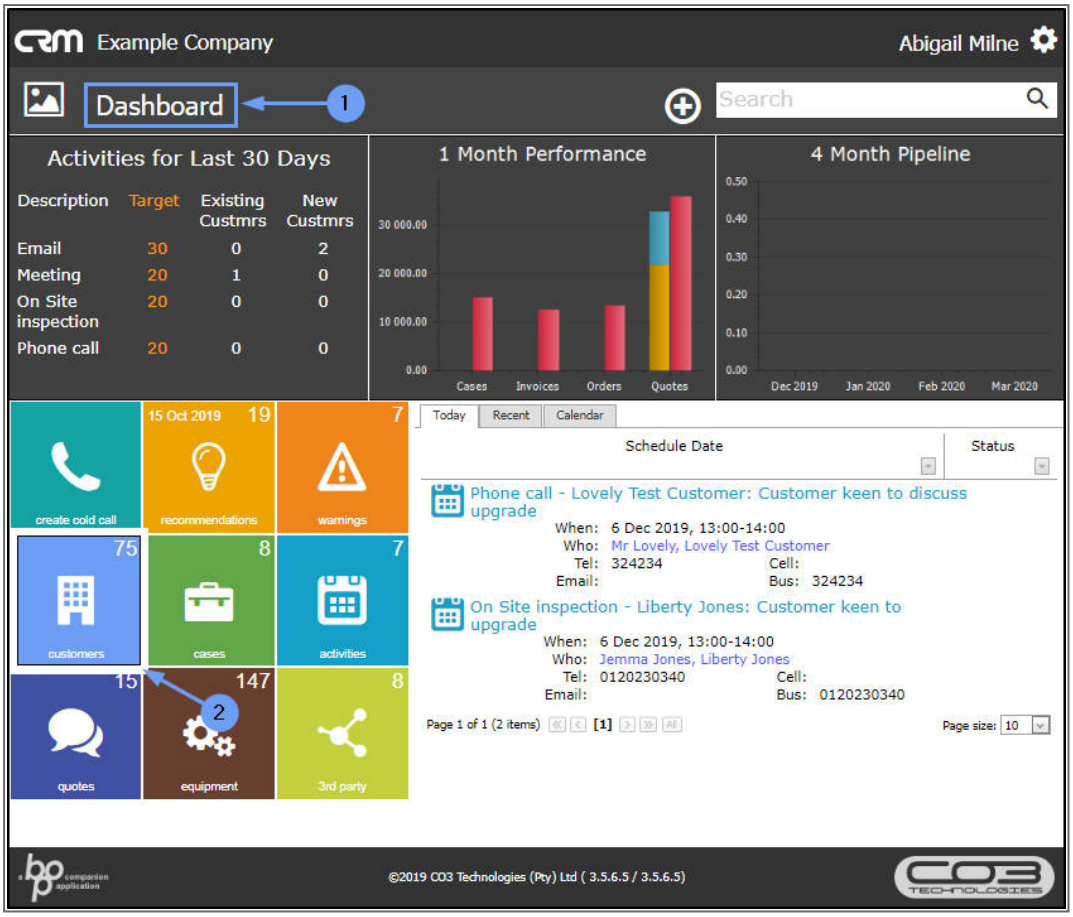

1. The ***Customers*** listing page will open.
2. Click on a ***Customer icon*** in the ***View*** column.

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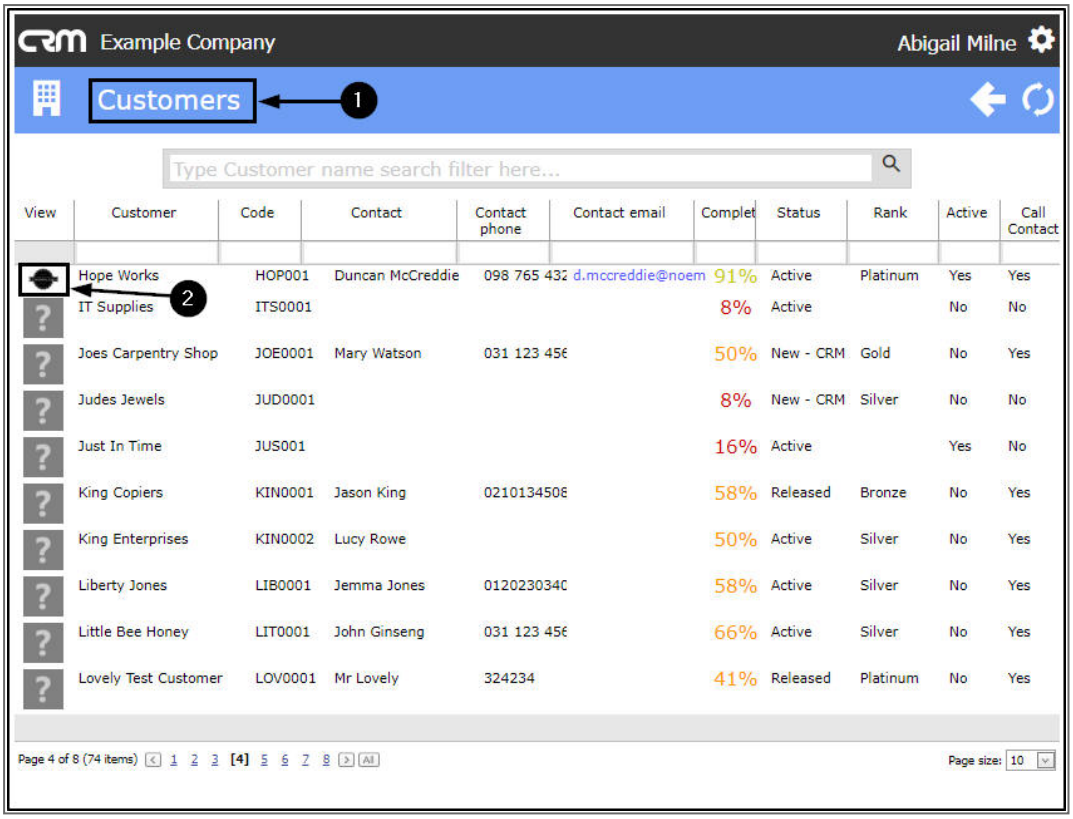

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	Lovely Test Customer	LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes

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Page size: 10

1. The ***Customer Home*** page will open.
2. Hover over or click on the ***User Name*** or ***Settings*** icon to display the ***Settings*** frame.
3. In the ***Options*** list, select the ***Hide Dashboard panel on customer page*** check box.

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1. As you ***select*** the check box,
2. The Dashboard will be ***hidden*** in the page.
3. Click anywhere outside of the Settings frame to ***collapse*** it.

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1. You can now view the whole page ***without*** the Dashboard
2. Click on the ***CRM logo*** to return to the ***Home page***.

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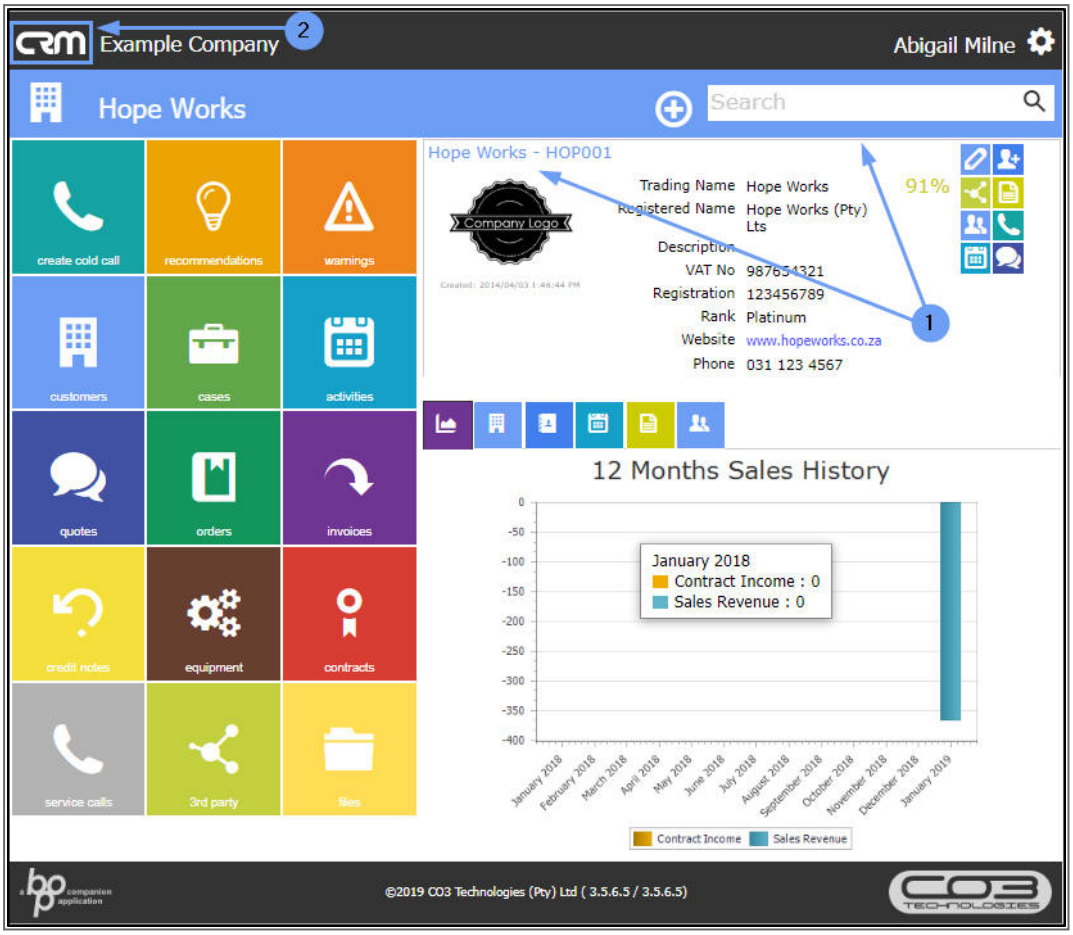

- The Dashboard is still ***visible*** in this page.

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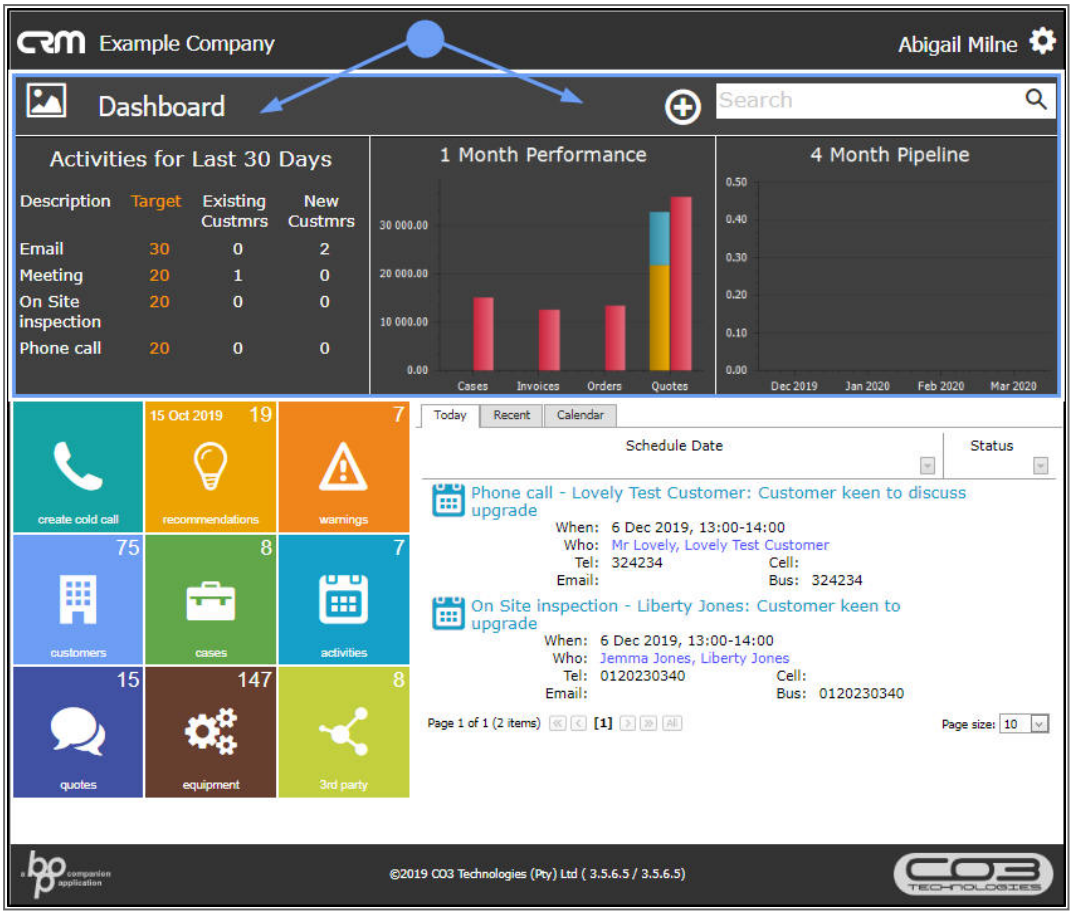

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