

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

- 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

The screenshot shows a CRM dashboard for 'Example Company' with the user 'Abigail Milne'. The dashboard includes a 'Dashboard' menu (1), a '1 Month Performance' bar chart, a '4 Month Pipeline' chart, and a 'Warnings' widget (2) listing activities like 'Email - King Copiers: Customer keen to discuss upgrade', 'On Site inspection - Hope Works: Visit site to assess upgrade requirements', and 'On Site inspection - Hope Works: Customer keen to update machines'. A user profile 'Abigail Milne' (3) is visible in the top right corner.

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

The screenshot shows the CRM interface for 'Example Company' with user 'Abigail Milne'. The dashboard includes a 'Dashboard' section, 'Activities for Last 30 Days' table, a navigation bar with icons for settings, salesmen settings, customer ranks, case config, and logout, and a grid of activity tiles. An 'Options' menu is open, showing the following settings:

- Show items for subordinates
- Exclude deleted customers in search on Cold Call screen
- Hide dashboard panel
- Hide dashboard panel on customer page

The 'Activities for Last 30 Days' table is as follows:

Description	Target	Existing Custmrs
Email	30	0
Meeting	20	1
On Site inspection	20	0
Phone call	20	0

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.



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.



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.

CRM Example Company | Abigail Milne

1 Dashboard

2 Abigail Milne

3 Options

Options

- Show items for subordinates
- Exclude deleted customers in search on Cold Call screen
- Hide dashboard panel
- Hide dashboard panel on customer page

Description	Target	Existing Custrs	New Custr
Email	30	0	2
Meeting	20	1	0
On Site inspection	20	0	0
Phone call	20	0	0

0.00 Cases Invoices Orders Quotes 0.00

Dec 2019 Jan 2020 Feb 2020 Mar 2020

15 Oct 2019 19 5

create cold call recommendations warnings

75 8 7

customers cases activities

15 147 8

quotes equipment 3rd party

Today Recent Calendar

Schedule Date Status

Email - King Copiers: Customer keen to discuss upgrade

When: 5 Dec 2019, 13:00-14:00
 Who: Jason King, King Copiers
 Tel: 0210134508 Cell: 0210134508
 Email: Bus: 0210134508

On Site inspection - Hope Works: Visit site to assess upgrade requirements

When: 5 Dec 2019, 13:00-14:00
 Who: John West, Hope Works
 Tel: 321654987 Cell: 031 123 4567
 Email: jwest@noemail.com Bus: 031 123 4567

On Site inspection - Hope Works: Customer keen to update machines

When: 5 Dec 2019, 10:00-11:00
 Who: Stewart Hope, Hope Works
 Tel: 031 123 4567 Cell: 031 123 4567
 Email: stewart@noemail.com Bus: 031 123 4567

©2019 CO3 Technologies (Pty) Ltd (3.5.6.5 / 3.5.6.5)

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

The screenshot shows the CO3 CRM interface for user Bianca Du Toit. The 'Session Options' section is highlighted with a red box, containing the following settings:

- Show items for subordinates
- Exclude deleted customers from search **Saved**
- Hide dashboard panel on customer page

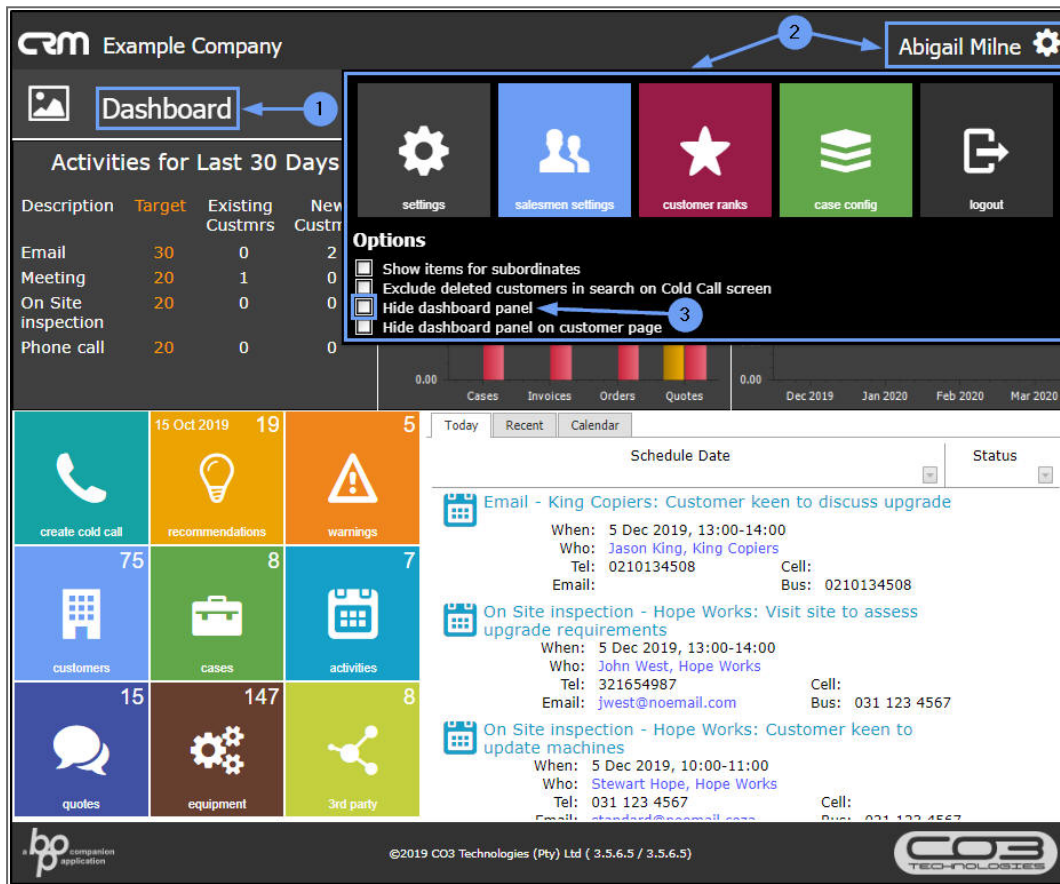
Other visible elements include:

- Navigation menu: settings, salesmen settings, customer ranks, stage gates, logout
- Activities for Last: Phone call (50), Email (16), Meeting (12), Site inspection (8)
- Dashboard tiles: create cold call (30 Sep 2016), recommendations (3), warnings (23), customers (42), cases (24), activities (23), quotes (19)
- Calendar view: Meeting - Meet to discuss requirements on 4 Oct 2016, 14:20. Attendees: Bettie Summervel, Betties Summer Shop at the Beach. Contact info: Tel: 031 123 4567, Email: co3dev@outlook.com

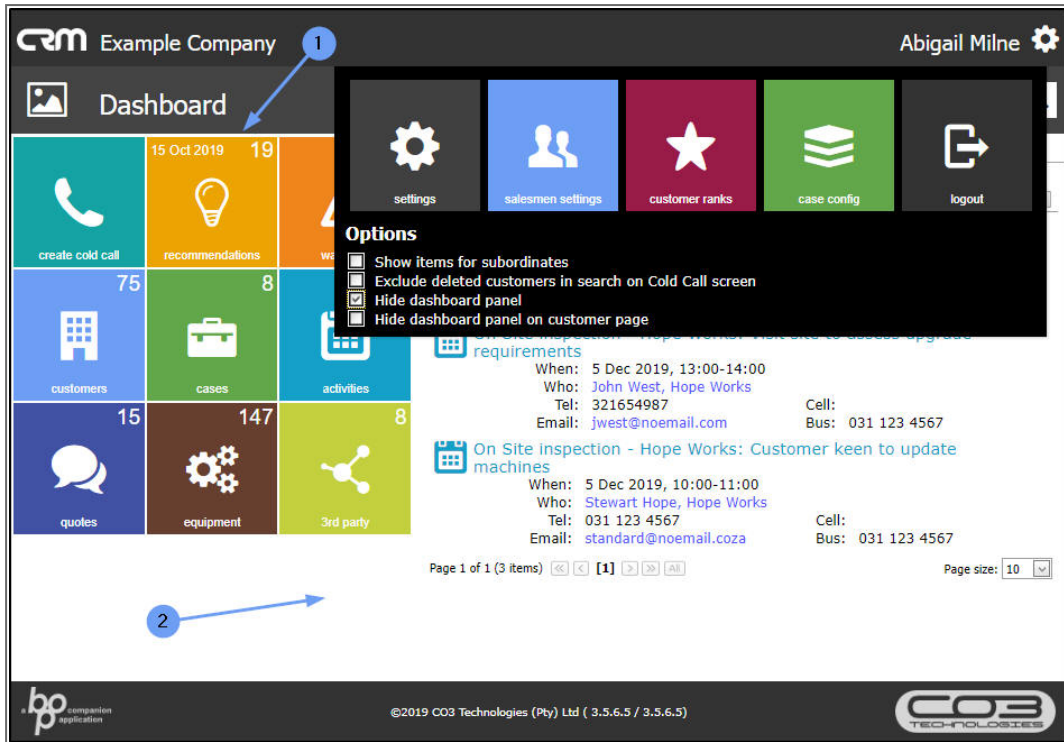
HIDE DASHBOARD PANEL

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

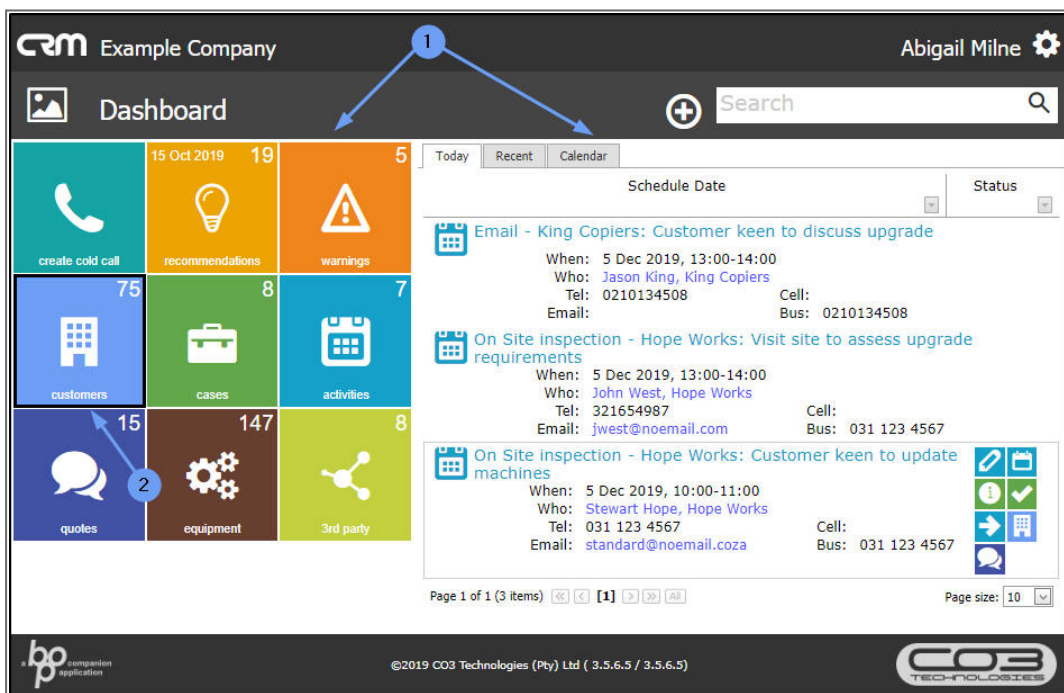
1. In the **Home** page (Dashboard),
2. Hover over or click on the **User Name** or **Settings** icon to display the **Settings** frame.
3. In the **Options** list, select the **Hide Dashboard panel** check box.



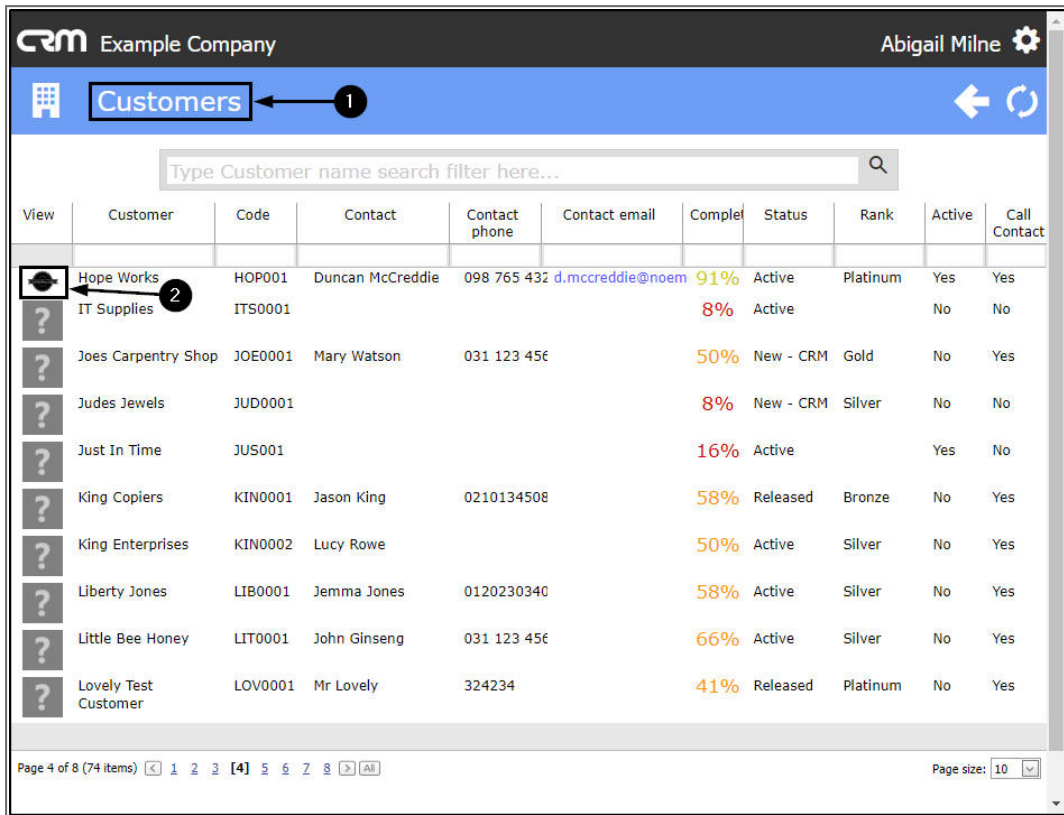
1. The Dashboard will be removed from the Home page.
2. Click anywhere outside of the Settings panel to collapse it to view the Home page fully.



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



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



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



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.

The screenshot shows the CRM interface for 'Example Company' with the user 'Abigail Milne'. The main view is for 'Hope Works - HOP001'. The interface includes a navigation menu on the left with options like 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'Rec'. The main content area displays company details such as 'Trading Name Hope Works', 'Registered Name Hope Works (Pty) Lts', 'Description', 'VAT No 987654321', 'Registration 123456789', 'Rank Platinum', 'Website www.hopeworks.co.za', and 'Phone 031 123 4567'. A '12 Months Sales History' bar chart is shown, with a legend for 'Contract Income' (yellow) and 'Sales Revenue' (blue). The chart shows a significant drop in sales revenue in January 2019. A settings gear icon is located in the top right corner of the interface.

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

The screenshot shows a CRM dashboard for 'Example Company' with user 'Abigail Milne'. The dashboard includes a grid of functional tiles such as 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. A settings panel is open, displaying options like 'Show items for subordinates', 'Exclude deleted customers in search on Cold Call screen', 'Hide dashboard panel', and 'Hide dashboard panel on customer page'. A red circle '1' highlights the 'warnings' tile, and a red circle '2' highlights the 'Hide dashboard panel' option. Below the settings panel is a '12 Months Sales History' bar chart showing 'Contract Income' and 'Sales Revenue' from January 2018 to January 2019. The chart shows a significant drop in sales revenue in January 2019.

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.***

The screenshot shows a CRM dashboard for 'Example Company' with user 'Abigail Milne'. The dashboard features a grid of functional tiles such as 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. A settings menu is open, displaying options like 'Show items for subordinates', 'Exclude deleted customers in search on Cold Call screen', 'Hide dashboard panel', and 'Hide dashboard panel on customer page'. A 'Refresh page to show dashboard' button is highlighted. Below the settings, a '12 Months Sales History' bar chart is visible, showing 'Contract Income' and 'Sales Revenue' from January 2018 to January 2019. The chart shows a significant negative spike in January 2019.

Month	Contract Income	Sales Revenue
January 2018	0	0
February 2018	0	0
March 2018	0	0
April 2018	0	0
May 2018	0	0
June 2018	0	0
July 2018	0	0
August 2018	0	0
September 2018	0	0
October 2018	0	0
November 2018	0	0
December 2018	0	0
January 2019	-350	-350

- **Refresh** the page.

The screenshot shows a web browser window with the URL `localhost:50000/BPOCRM/ViewCustomer.aspx?CustomerID=2`. The page title is "Example Company" and the user is "Abigail Milne". The main content area is titled "Hope Works - HOP001" and features a grid of 18 navigation tiles: create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files. To the right, a company information panel displays details for "Hope Works" with a 91% status indicator. Below this is a "12 Months Sales History" bar chart showing zero values for both Contract Income and Sales Revenue from January 2018 to January 2019. The footer includes the CO3 Technologies logo and version information: "©2019 CO3 Technologies (Pty) Ltd (3.5.6.5 / 3.5.6.5)".

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.

The screenshot displays a CRM dashboard for 'Example Company' (user: Abigail Milne). The main section is for 'Hope Works' (HOP001). It includes a table for activities, performance charts for the last month and a 4-month pipeline, a central information card with a 91% rating, and a 12-month sales history chart. A red circle with the number '1' highlights the 'Company Logo' area in the central information card.

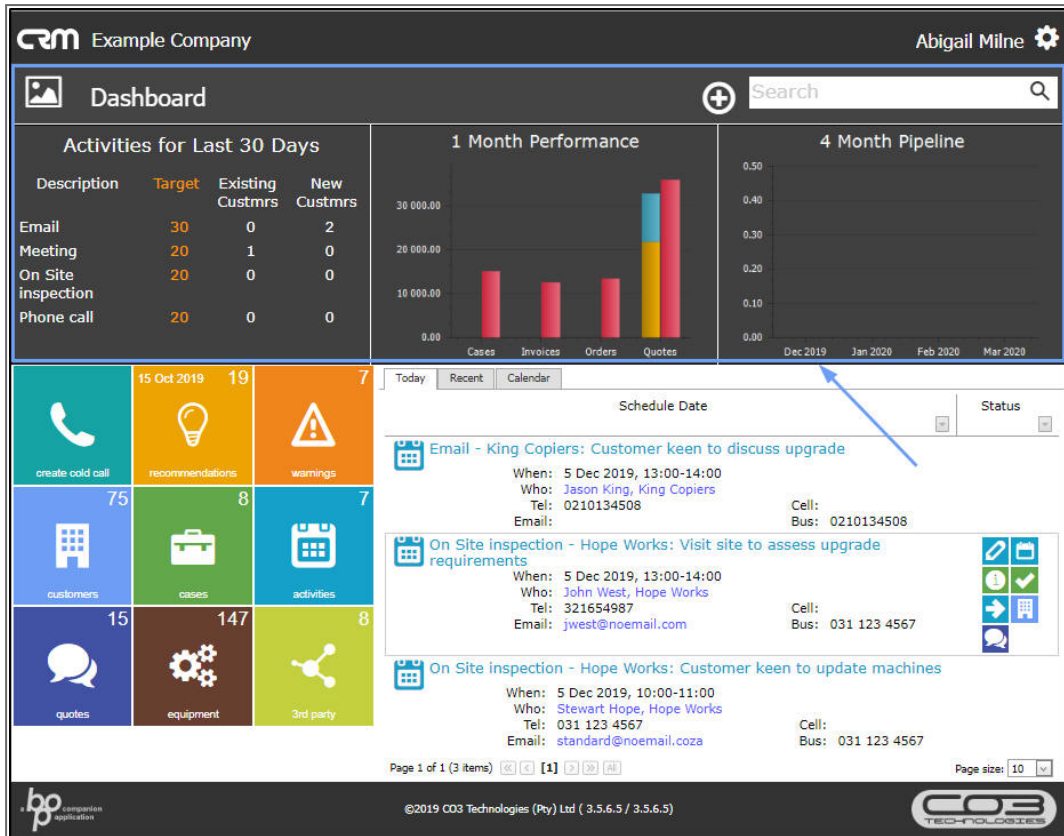
Description	Target	Existing Custmrs	New Custmrs
Email	30	0	2
Meeting	20	1	0
On Site inspection	20	0	0
Phone call	20	0	0

Category	Value
Cases	~15,000.00
Invoices	~12,000.00
Orders	~12,000.00
Quotes	~25,000.00

Month	Value
Dec 2019	0.00
Jan 2020	0.00
Feb 2020	0.00
Mar 2020	0.00

Month	Contract Income	Sales Revenue
January 2018	0	0
February 2018	0	0
March 2018	0	0
April 2018	0	0
May 2018	0	0
June 2018	0	0
July 2018	0	0
August 2018	0	0
September 2018	0	0
October 2018	0	0
November 2018	0	0
December 2018	0	0
January 2019	~350	~350

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



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.

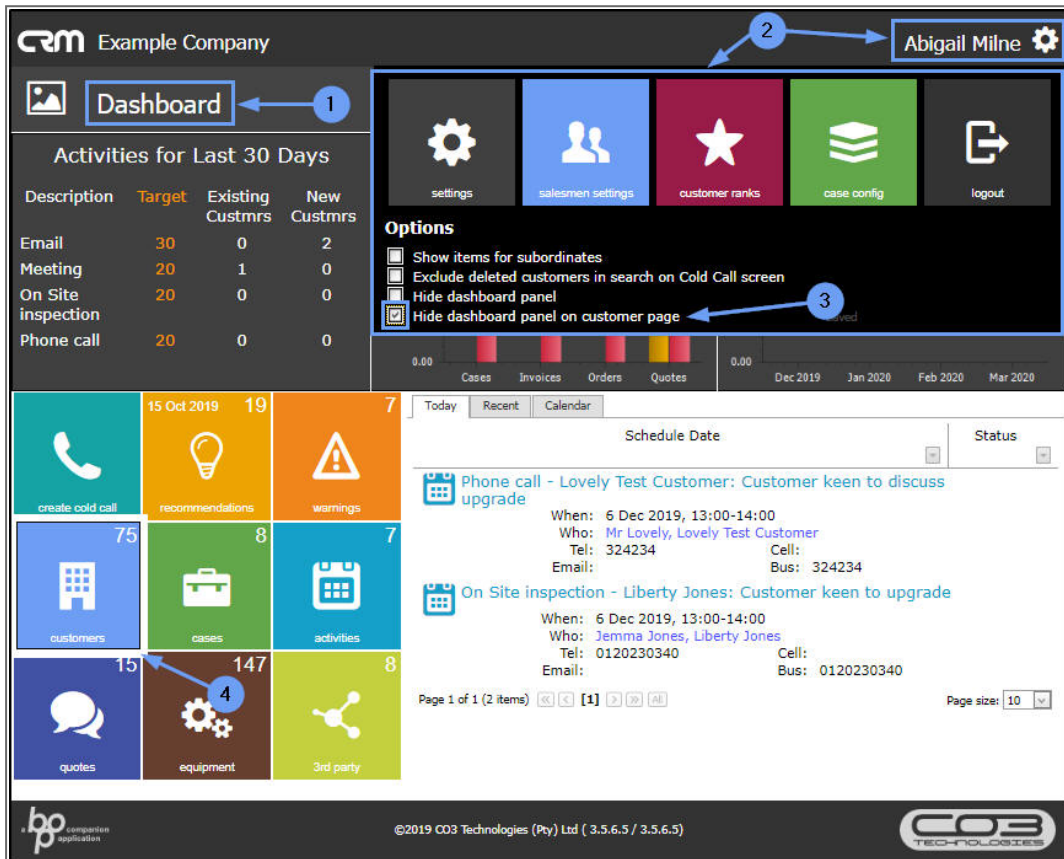
SELECT OPTION FROM HOME PAGE

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

- 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.

- Click on the **Customers** tile.



The screenshot shows the CRM interface for 'Example Company' with user 'Abigail Milne'. The 'Options' menu is open, and the 'Hide dashboard panel on customer page' option is checked. The 'Customers' tile is highlighted with a blue arrow.

Description	Target	Existing Custmrs	New Custmrs
Email	30	0	2
Meeting	20	1	0
On Site inspection	20	0	0
Phone call	20	0	0

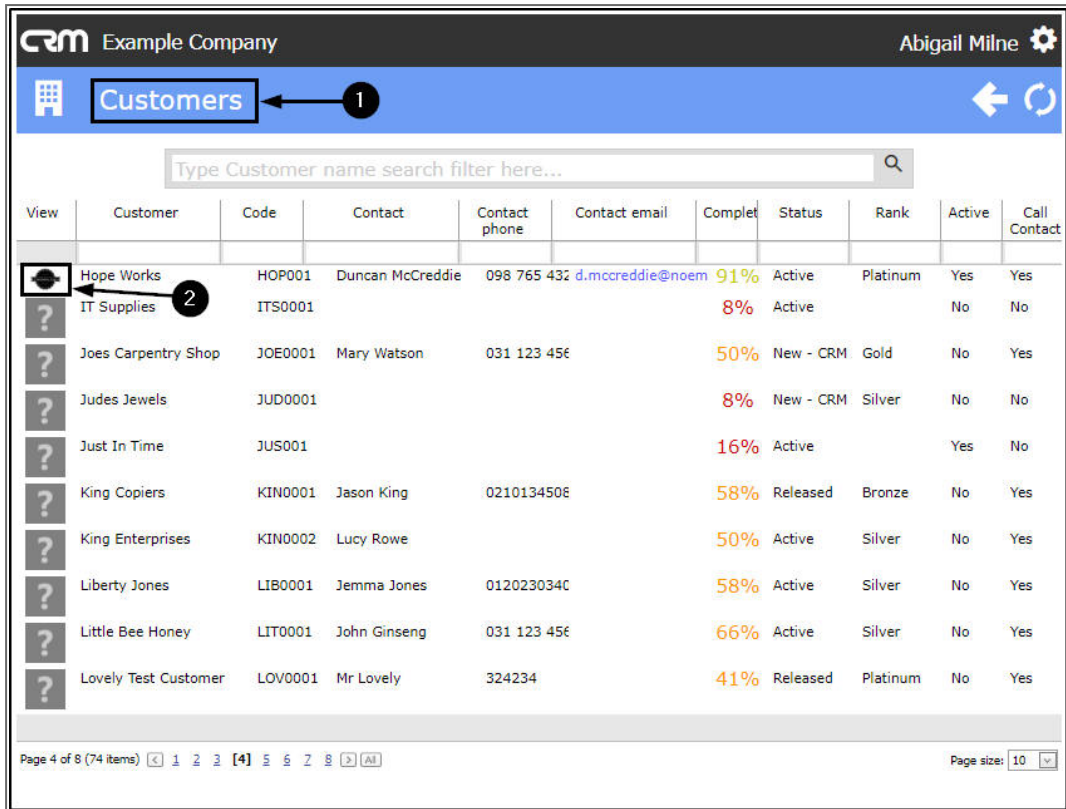
Options:

- Show items for subordinates
- Exclude deleted customers in search on Cold Call screen
- Hide dashboard panel
- Hide dashboard panel on customer page

Customers listing:

Today	Recent	Calendar	Status
Phone call - Lovely Test Customer: Customer keen to discuss upgrade	When: 6 Dec 2019, 13:00-14:00 Who: Mr Lovely, Lovely Test Customer Tel: 324234 Email:	Cell: 324234 Bus: 324234	
On Site inspection - Liberty Jones: Customer keen to upgrade	When: 6 Dec 2019, 13:00-14:00 Who: Jemma Jones, Liberty Jones Tel: 0120230340 Email:	Cell: 0120230340 Bus: 0120230340	

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



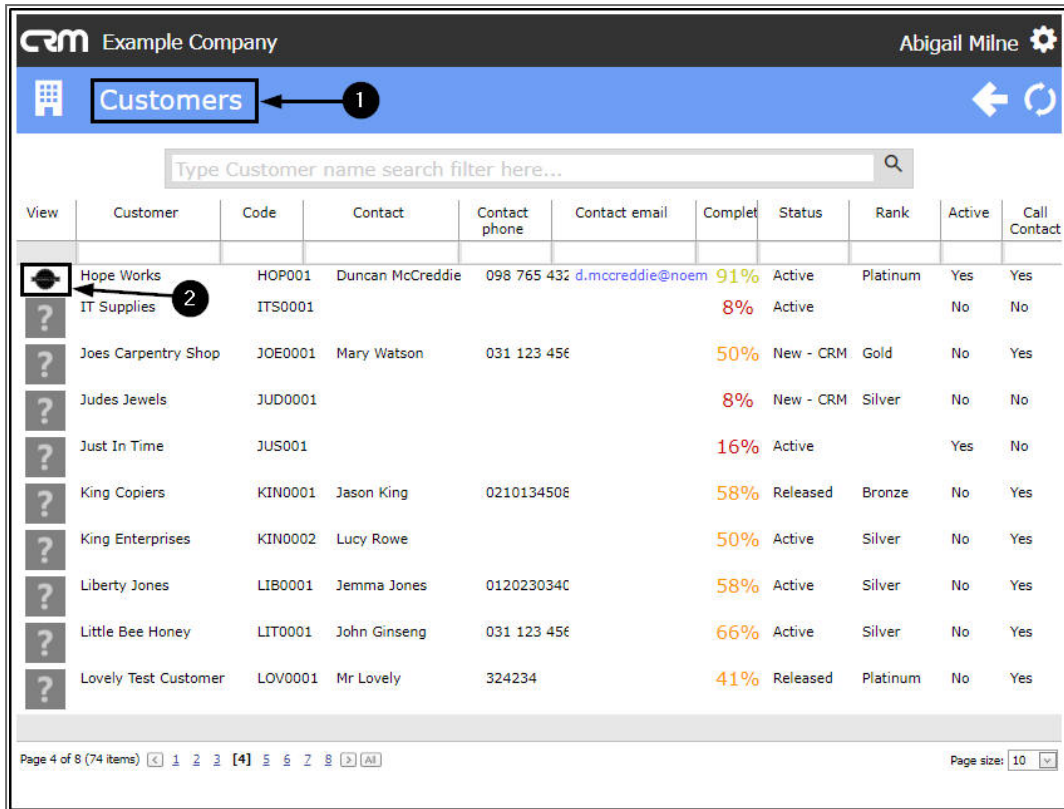
1. The **Customer Home** page will open.
2. The Dashboard will be **hidden** in this page.
3. Click on the **CRM logo** to return to the Home page.

SELECT OPTION FROM CUSTOMER HOMEPAGE

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

The screenshot shows a CRM dashboard for 'Example Company' with user 'Abigail Milne'. A blue box labeled '1' highlights the 'Dashboard' menu item. Below the dashboard, a grid of widgets includes 'customers' with a count of 75. A blue arrow labeled '2' points to the 'customers' widget. To the right, a list of activities is shown, including 'Phone call - Lovely Test Customer: Customer keen to discuss upgrade' and 'On Site inspection - Liberty Jones: Customer keen to upgrade'. The footer contains '©2019 CO3 Technologies (Pty) Ltd (3.5.6.5 / 3.5.6.5)' and the CO3 TECHNOLOGIES logo.

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



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.

The screenshot shows the CRM interface for 'Example Company' with user 'Abigail Milne'. The 'Hope Works' dashboard is active. A settings panel is open, showing options for 'Hide dashboard panel' and 'Hide dashboard panel on customer page'. Annotations 1, 2, and 3 point to the 'Hope Works' header, the settings panel, and the 'Hide dashboard panel on customer page' option respectively.

Description	Target	Existing Custmrs	New Custmrs
Email	30	0	2
Meeting	20	1	0
On Site inspection	20	0	0
Phone call	20	0	0

Options

- Show items for subordinates
- Exclude deleted customers in search on Cold Call screen
- Hide dashboard panel
- Hide dashboard panel on customer page

12 Months Sales History

Month	Contract Income	Sales Revenue
January 2018	0	0
February 2018	0	0
March 2018	0	0
April 2018	0	0
May 2018	0	0
June 2018	0	0
July 2018	0	0
August 2018	0	0
September 2018	0	0
October 2018	0	0
November 2018	0	0
December 2018	0	0
January 2019	0	-350

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.

The screenshot shows the CRM interface for 'Example Company' with user 'Abigail Milne'. The left sidebar contains various functional tiles like 'create cold call', 'recommendations', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The top right has navigation buttons for 'settings', 'salesmen settings', 'customer ranks', 'case config', and 'logout'. An 'Options' panel is open, showing settings such as 'Show items for subordinates', 'Exclude deleted customers in search on Cold Call screen', 'Hide dashboard panel', and 'Hide dashboard panel on customer page'. A '12 Months Sales History' bar chart is displayed, showing 'Contract Income' and 'Sales Revenue' for each month from January 2018 to January 2019. A legend indicates that for January 2018, both Contract Income and Sales Revenue are 0. The chart shows a significant negative spike in January 2019.

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

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main view is for 'Hope Works - HOP001'. The dashboard includes a sidebar with buttons for 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The main content area displays company details: Trading Name: Hope Works, Registered Name: Hope Works (Pty) Lts, VAT No: 987654321, Registration: 123456789, Rank: Platinum, Website: www.hopeworks.co.za, Phone: 031 123 4567. A '12 Months Sales History' chart shows 'Contract Income : 0' and 'Sales Revenue : 0' for January 2018. The footer contains '©2019 CO3 Technologies (Pty) Ltd (3.5.6.5 / 3.5.6.5)' and the CO3 TECHNOLOGIES logo.

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

CRM Example Company
Abigail Milne

Dashboard
Search

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Email	30	0	2
Meeting	20	1	0
On Site inspection	20	0	0
Phone call	20	0	0

1 Month Performance

4 Month Pipeline

15 Oct 2019 19
create cold call

19
recommendations

7
warnings

75
customers

8
cases

7
activities

15
quotes

147
equipment

8
3rd party

Today Recent Calendar
Schedule Date
Status

Phone call - Lovely Test Customer: Customer keen to discuss upgrade

When: 6 Dec 2019, 13:00-14:00

Who: Mr Lovely, Lovely Test Customer

Tel: 324234 Cell: 324234

Email: Bus: 324234

On Site inspection - Liberty Jones: Customer keen to upgrade

When: 6 Dec 2019, 13:00-14:00

Who: Jemma Jones, Liberty Jones

Tel: 0120230340 Cell: 0120230340

Email: Bus: 0120230340

Page 1 of 1 (2 items)
Page size:

comparison application
©2019 CO3 Technologies (Pty) Ltd (3.5.6.5 / 3.5.6.5)

CRM.000.022

Help v2.5.0.14 - Pg 27 - Printed: 25/06/2024

CO3 Technologies (Pty) Ltd © Company Confidential

