

CRM BASICS

THIRD PARTY

Third Party contains information relating to a customer's current (or expired) contract with a third party provider.

This is helpful for the various reasons including the following:

- To know when to contact your client as their third party contract ends / is due to end.
- To know what your client's current **Item(s)** and **Item(s) Usage** charges are, so that when you create a proposal or quote - you can ensure that it is competitive.

In **CRM**, you can access current Third Party information for a customer in **2** different pages:

1. From the CRM **Homepage**. This will direct you to the ***Third Party for [Salesman's Name] Customers*** page:
 - This will list all the salesman's customers that are linked to Third Party contracts.
2. From the **Customer Homepage**. This will direct you to the ***Third Party for [Customer Name]*** page:
 - This will list all the Third Party contracts linked to the selected customer.

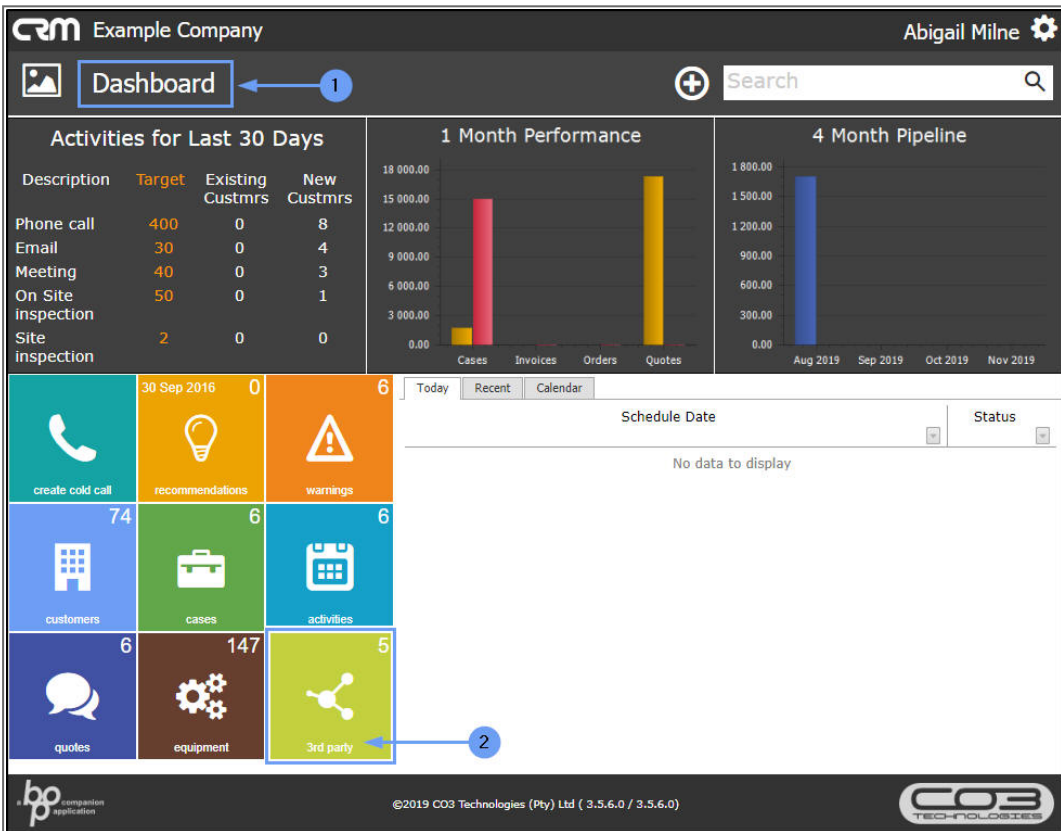
To [Add a new Third Party to a Customer](#), it is quickest to navigate from the Customers (listing) page.

In this manual we will cover the **1st** process; accessing Third Party information from the CRM **Homepage**.

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

THIRD PARTY HOMEPAGE TILE

1. In the CRM *Homepage*,
2. Click on the **3rd Party** tile.
 - You will note a **number** in the top right corner of this tile - this indicates the **total amount** of Third Party Contracts linked to the salesman's customers.



The screenshot shows the CRM Example Company dashboard for user Abigail Milne. The dashboard includes a search bar, a 'Dashboard' tab (marked with a blue circle '1'), and several performance charts. Below the charts is a grid of tiles representing different CRM functions. The '3rd party' tile, which shows a value of 5, is highlighted with a blue circle '2'.

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	8
Email	30	0	4
Meeting	40	0	3
On Site inspection	50	0	1
Site inspection	2	0	0

Category	Value
Cases	~15,000.00
Invoices	~1,000.00
Orders	~15,000.00
Quotes	~15,000.00

Month	Value
Aug 2019	~1,500.00
Sep 2019	~1,500.00
Oct 2019	~1,500.00
Nov 2019	~1,500.00

Tile	Value
create cold call	0
recommendations	6
warnings	6
customers	74
cases	6
activities	6
quotes	6
equipment	147
3rd party	5

THIRD PARTY FOR [SALESMAN'S NAME] PAGE

1. The **Third Party for [Salesman's Name] Customers** page will open.

Here you can view a list of all the salesman's customers linked to third party contracts with a summary of each contract.

For more information on the features and functions in this page, click on the following links:

2. The [Page Reference and Page Size](#) fields
3. The [All](#) Button
4. The [Create Filter](#) row
 - The [Filter Builder](#) screen
 - [Clear the Filter](#) (but keep the filter sequence reference)
 - [Clear the Filter Sequences](#)
5. The [Filter Text Box](#)
 - [Clear the Filter Text Box](#)

The screenshot displays the CRM interface for 'Example Company' with the user 'Abigail Milne'. The main heading is 'Third Party for Abigail Milne's Customers'. Below this is a table with the following columns: Customer Code, Customer Name, Third Party Name, Make, Model, and Serial No. The table contains five rows of contract data. At the bottom of the interface, there are pagination controls showing 'Page 1 of 1 (5 items)' and 'Page size: 10'. A 'Create Filter' button is located at the bottom left. Numbered callouts (1-5) point to various UI elements: 1 points to the page title, 2 points to the pagination controls, 3 points to the 'Create Filter' button, 4 points to the 'Create Filter' text, and 5 points to a contract row.

Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
Hope Works (HOP001)	Minolta	M123 (SN: A12345)			
Hope Works (HOP001)	Kyocera	K123			
Hope Works (HOP001)	Sambin	Sprint , SP9000			
Ernsler, White and Goyette (ERN0001)	Sprint	Sprint , SP2010 (SN: SP123456)			
King Enterprises (KIN0002)	Cable and Co.	Cables			

QUICK VIEW THIRD PARTY 'MAIN' INFORMATION SUMMARY

1. In the *Third Party for [Salesman's Name] Customers* page,
2. You can view a summary of the Third Party *main information*.

QUICK VIEW THIRD PARTY 'ITEM' INFORMATION SUMMARY

3. Click on the **expand** icon in front of the Third Party that you wish to view the Item information of.

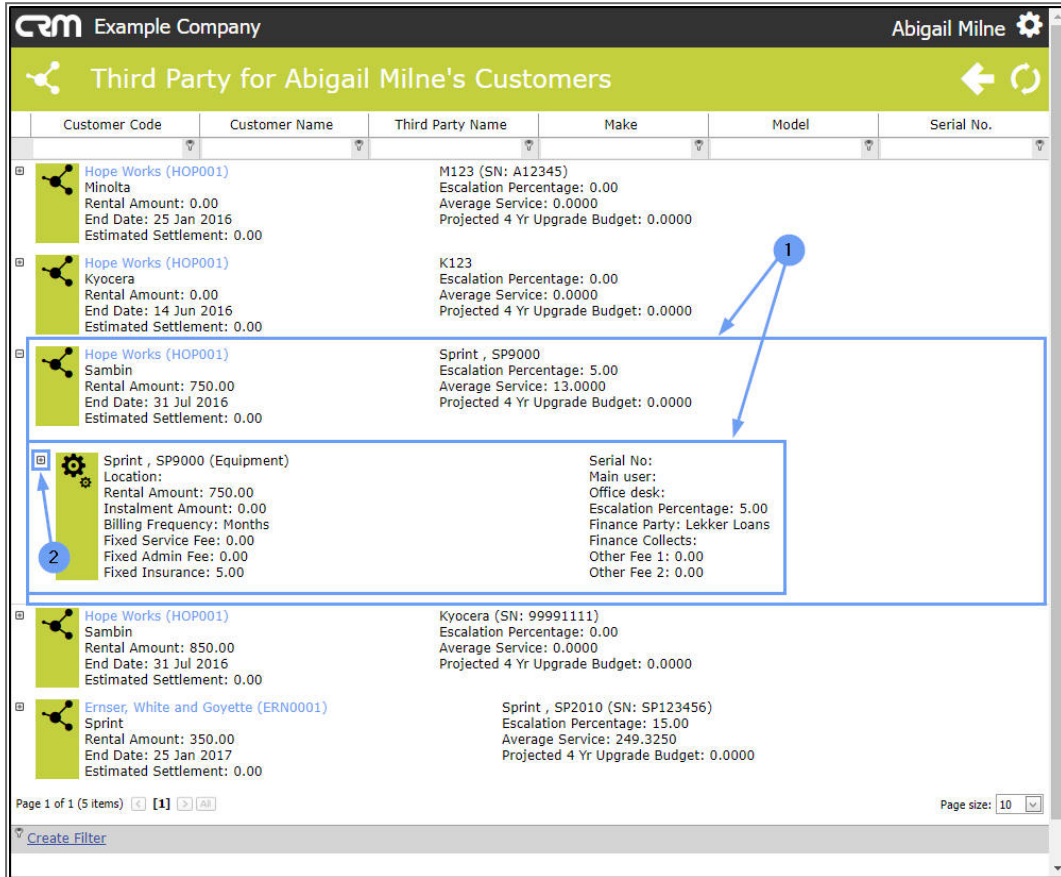
Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
Hope Works (HOP001)	Minolta	M123 (SN: A12345)			
	Rental Amount: 0.00	Escalation Percentage: 0.00			
	End Date: 25 Jan 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Kyocera	K123			
	Rental Amount: 0.00	Escalation Percentage: 0.00			
	End Date: 14 Jun 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Sambin	Sprint , SP9000			
	Rental Amount: 750.00	Escalation Percentage: 5.00			
	End Date: 31 Jul 2016	Average Service: 13.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Sambin	Kyocera (SN: 99991111)			
	Rental Amount: 850.00	Escalation Percentage: 0.00			
	End Date: 31 Jul 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Ernser, White and Goyette (ERN0001)	Sprint	Sprint , SP2010 (SN: SP123456)			
	Rental Amount: 350.00	Escalation Percentage: 15.00			
	End Date: 25 Jan 2017	Average Service: 249.3250			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			

1. The selected Third Party frame will expand to reveal a summary of the Third Party *Item*.

This *Item* section allows you to save information regarding the equipment item itself.

QUICK VIEW THIRD PARTY 'ITEM USAGE TYPE' INFORMATION SUMMARY

2. Click on the *expand* icon in front of the *Item* frame.



1. The Item frame will expand to reveal the Item *Usage Type* frame with a summary of the usage information.

This frame allows you to add details for the minimum and maximum billing and the cost per copy charges, if applicable.

2. You can now view a summary of each tier of the Third Party:

- **Contract** summary
- **Item** Summary
- Item **Usage Type** summary

Third Party for Abigail Milne's Customers
← ↻

Rental Amount: 0.00 End Date: 14 Jun 2016 Estimated Settlement: 0.00	Average Service: 0.0000 Projected 4 Yr Upgrade Budget: 0.0000
Hope Works (HOP001) Sambin Rental Amount: 750.00 End Date: 31 Jul 2016 Estimated Settlement: 0.00	Sprint , SP9000 Escalation Percentage: 5.00 Average Service: 13.0000 Projected 4 Yr Upgrade Budget: 0.0000
Sprint , SP9000 (Equipment) Location: Rental Amount: 750.00 Instalment Amount: 0.00 Billing Frequency: Months Fixed Service Fee: 0.00 Fixed Admin Fee: 0.00 Fixed Insurance: 5.00	Serial No: Main user: Office desk: Escalation Percentage: 5.00 Finance Party: Lekker Loans Finance Collects: Other Fee 1: 0.00 Other Fee 2: 0.00
Usage Type	
Usage type: Mono meter Min Billing: 0.00 Free Usage Qty: 0.00 Avg Qty: 2500.00	Per Unit Charge: 0.52 Tier1 Unit Charge: 0.60 Tier1 Usage Limit: 0.70 Tier2 Unit Charge: 0.80 Tier2 Usage Limit: 0.00
Hope Works (HOP001) Sambin Rental Amount: 850.00 End Date: 31 Jul 2016 Estimated Settlement: 0.00	Kyocera (SN: 99991111) Escalation Percentage: 0.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: 0.0000
Ernsler, White and Goyette (ERN0001) Sprint Rental Amount: 350.00 End Date: 25 Jan 2017 Estimated Settlement: 0.00	Sprint , SP2010 (SN: SP123456) Escalation Percentage: 15.00 Average Service: 249.3250 Projected 4 Yr Upgrade Budget: 0.0000

Page 1 of 1 (5 items) [1] Page size: 10

[Create Filter](#)

VIEW / EDIT AND DELETE ACTION BUTTONS

- You can hover over any of these 3 frames to display the **Action** buttons:

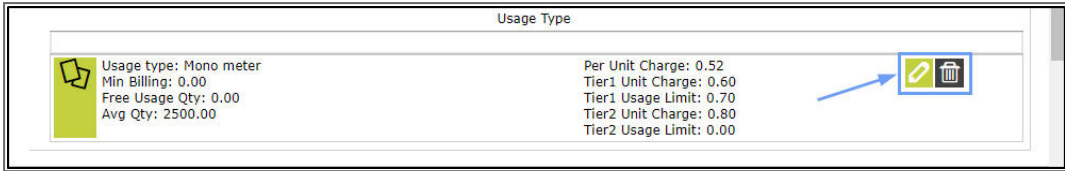
- View/Edit
- Delete

Hope Works (HOP001)
 Sambin
 Rental Amount: 750.00
 End Date: 31 Jul 2016
 Estimated Settlement: 0.00

Sprint , SP9000
 Escalation Percentage: 5.00
 Average Service: 13.0000
 Projected 4 Yr Upgrade Budget: 0.0000

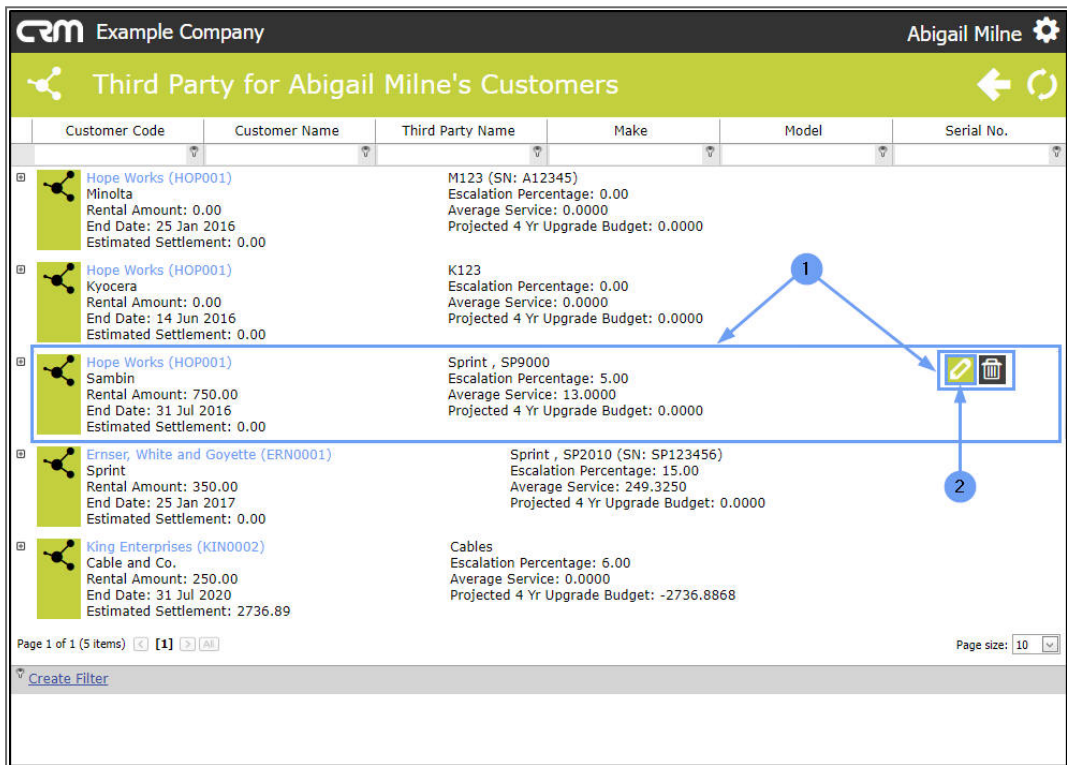
Sprint , SP9000 (Equipment)
 Location:
 Rental Amount: 750.00
 Instalment Amount: 0.00
 Billing Frequency: Months
 Fixed Service Fee: 0.00
 Fixed Admin Fee: 0.00
 Fixed Insurance: 5.00

Serial No:
 Main user:
 Office desk:
 Escalation Percentage: 5.00
 Finance Party: Lekker Loans
 Finance Collects:
 Other Fee 1: 0.00
 Other Fee 2: 0.00



VIEW / ADD / EDIT THIRD PARTY 'MAIN' INFORMATION

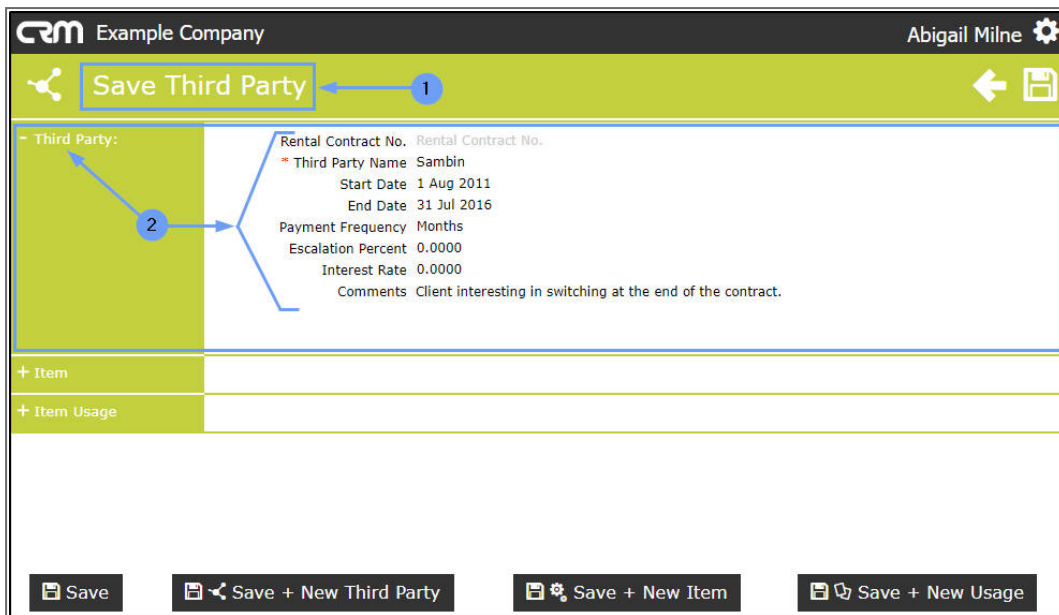
1. Hover over a Third Party **Main Information** summary to reveal the **Action** buttons:
2. Click on the **View / Edit this Third Party** button.



1. The **Save Third Party** page will open.
2. The **Third Party** section will be auto-expanded. This section is for entering the **Main Information** regarding the Third Party and the contract details. You can view, add and or edit the details as required:

- **Rental Contract No:** Type in the rental contract no.
- **Third Party Name:** Type in the Third Party name.
- **Start Date:** Click in this field and either type in the start date or click on the drop-down arrow and use the calendar function to select the date.
- **End Date:** Click in this field and either type in the end date or click on the drop-down arrow and use the calendar function to select the end date.
- **Payment Frequency:** Click in this field and select from the drop-down menu the payment frequency (e.g. *monthly*).
- **Escalation Period:** Click in this field and either type in or use the directional arrows to select the escalation percentage.
- **Interest Rate:** Click in this field and either type in or use the directional arrows to select the interest rate.
- **Comments:** Click in this field and type in a comment relating to this Third Party contract, if required.

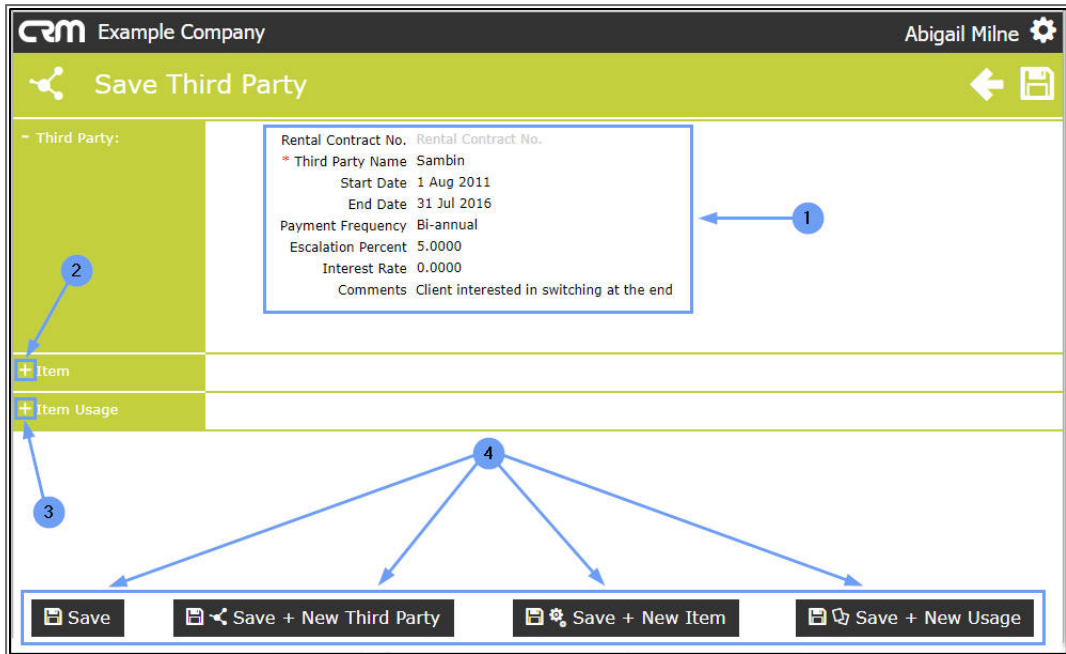
Note: You may not have all the Third Party information, but **CRM** provides fields for all relevant contract information. Fields with a red asterisk (*) are mandatory.



1. When you have entered or edited the Third Party detail as required, you have several choices in this page:
2. You can expand the Item section and [view / edit / add](#) any '*Item*' Information, if applicable.
3. You can expand the Item Usage section and [view / edit / add](#) any '*Item Usage*' information, if applicable.

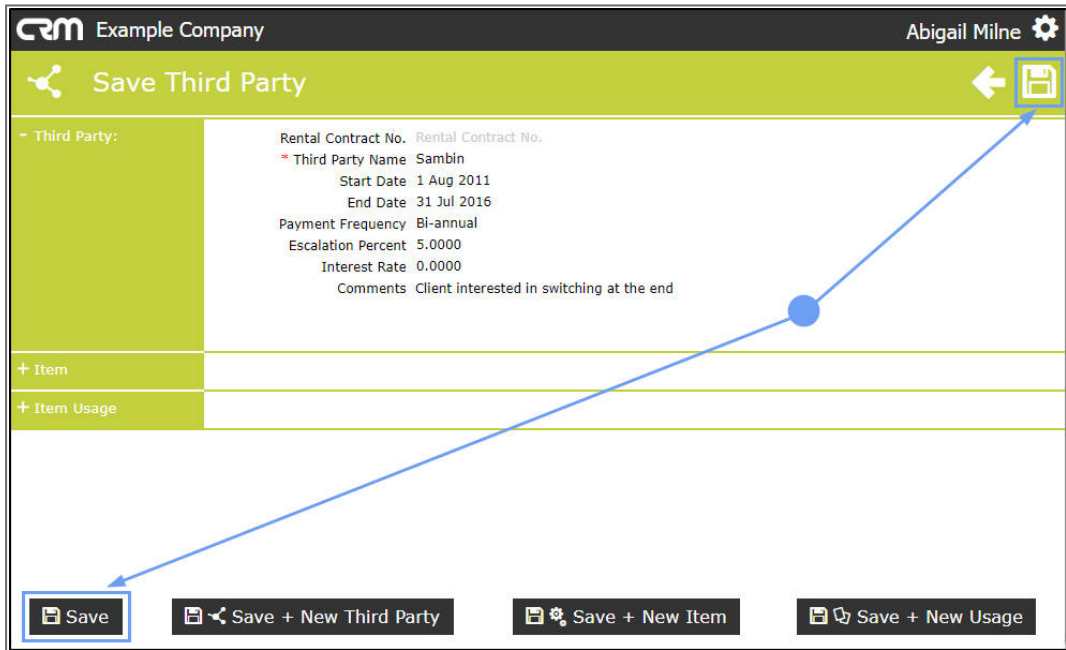
SAVE OPTIONS

4. Or you can select one of the **Save** options,
5. **Save**,
6. **Save + New Third Party**,
7. **Save + New Item**
8. **Save + New Usage**



SAVE

- If you click on **Save**,



- The edited details will be *saved* and you will return to the *Third Party for [Salesman's Name] Customers* page.

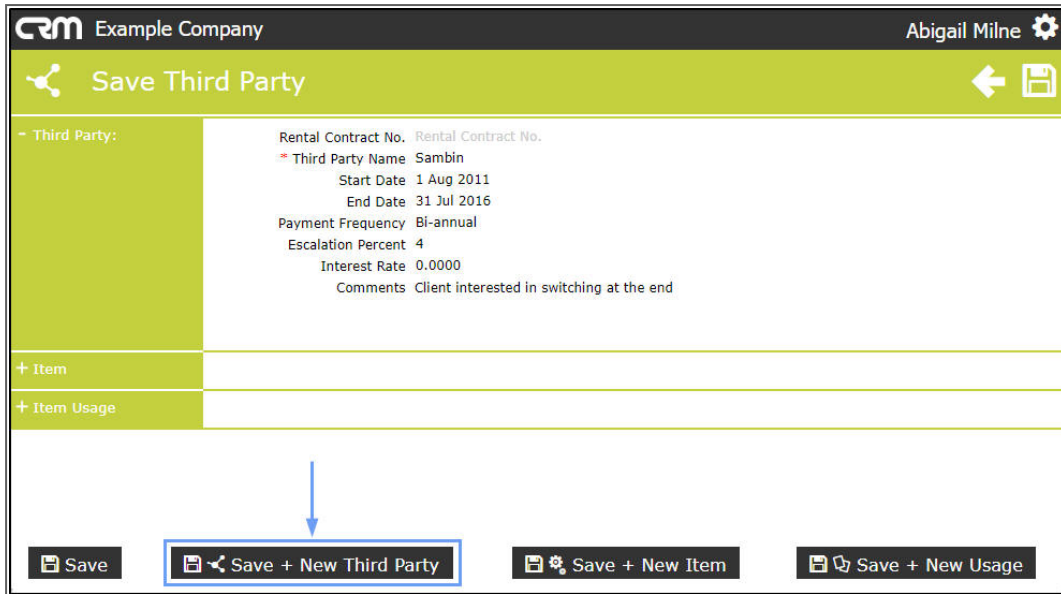
Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
Hope Works (HOP001) Minolta Rental Amount: 0.00 End Date: 25 Jan 2016 Estimated Settlement: 0.00		M123 (SN: A12345) Escalation Percentage: 0.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001) Kyocera Rental Amount: 0.00 End Date: 14 Jun 2016 Estimated Settlement: 0.00		K123 Escalation Percentage: 0.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001) Sambin Rental Amount: 750.00 End Date: 31 Jul 2016 Estimated Settlement: 0.00		Sprint , SP9000 Escalation Percentage: 5.00 Average Service: 13.0000 Projected 4 Yr Upgrade Budget: 0.0000			
Ernser, White and Goyette (ERN0001) Sprint Rental Amount: 350.00 End Date: 25 Jan 2017 Estimated Settlement: 0.00		Sprint , SP2010 (SN: SP123456) Escalation Percentage: 15.00 Average Service: 249.3250 Projected 4 Yr Upgrade Budget: 0.0000			
King Enterprises (KIN0002) Cable and Co. Rental Amount: 250.00 End Date: 31 Jul 2020 Estimated Settlement: 2736.89		Cables Escalation Percentage: 6.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: -2736.8868			

Page 1 of 1 (5 items) [1] Page size: 10

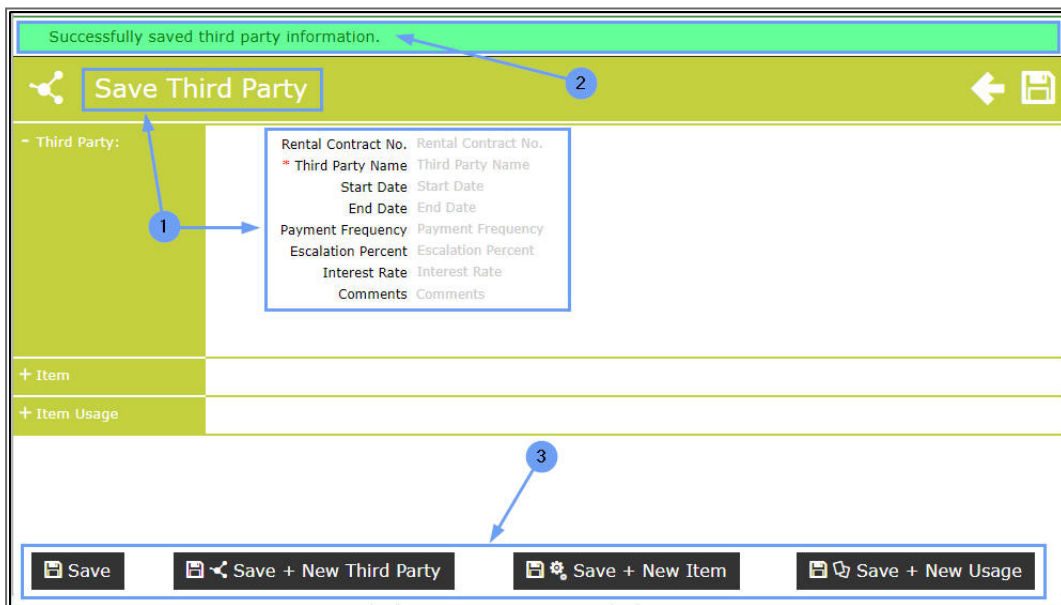
SAVE + NEW THIRD PARTY

(save all details and add a new Third Party)

- If you click on *Save + New Third Party*,



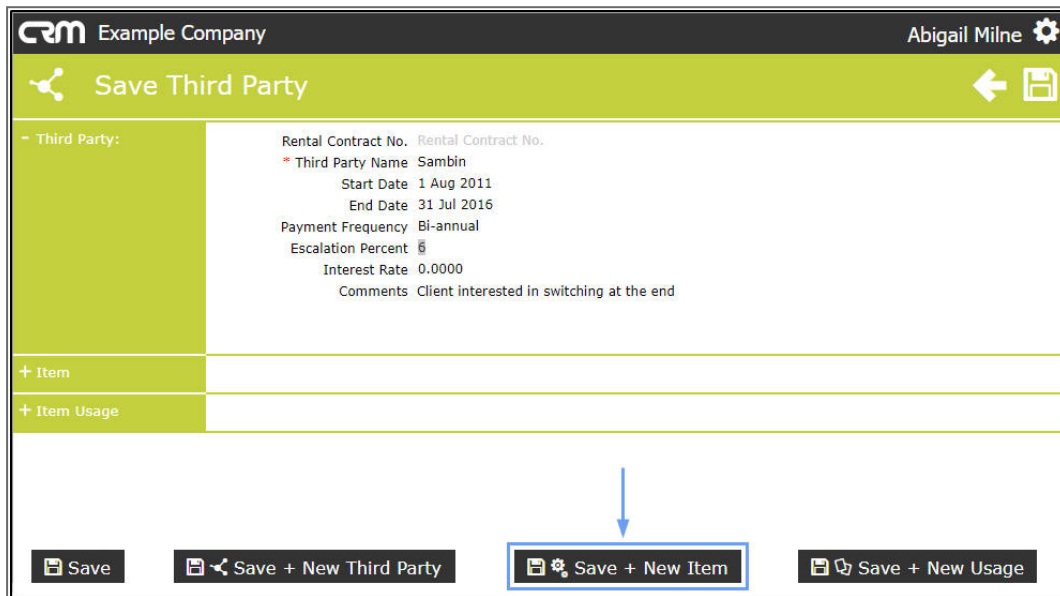
1. The page will **refresh** and clear the Third Party section details, ready for you to add new Third Party details.
2. A message bar will appear at the top of the page stating;
 - **Successfully saved third party information.**
3. Select the appropriate **Save option** to save your changes.



SAVE + NEW ITEM

(saves all details and adds a new equipment items for the same Third Party)

- If you click on **Save + New Item**,



CRM Example Company Abigail Milne

Save Third Party

- Third Party:

Rental Contract No. Rental Contract No.
 * Third Party Name Sambin
 Start Date 1 Aug 2011
 End Date 31 Jul 2016
 Payment Frequency Bi-annual
 Escalation Percent 6
 Interest Rate 0.0000
 Comments Client interested in switching at the end

+ Item
 + Item Usage

Save Save + New Third Party **Save + New Item** Save + New Usage

1. The page will **refresh** but the Third Party details will remain in this page, ready for you to add a **new item** to this Third Party Item section.
2. A message bar will appear at the top of the page stating;
 - **Successfully saved third party information.**
3. Click on the **expand** icon in front of **Item**.



1. The *Item* section will **expand** and the details will have been cleared, ready for you to add new Item details.
2. When you have added the new Item details, select the appropriate **Save option** to save your changes.

Successfully saved third party information.

Save Third Party

- Third Party:

Rental Contract No. Rental Contract No.
 * Third Party Name **Sambin**
 Start Date 1 Aug 2011
 End Date 31 Jul 2016
 Payment Frequency Bi-annual
 Escalation Percent 6.0000
 Interest Rate 0.0000
 Comments Client interested in switching at the end

- Item

Item Type Item Type
 * **Make** Make
 Model Model
 Serial Number Serial number
 Location Location
 Description Description

Main User Main User
 Office Desk No Office Desk No
 Rental Amount Rental Amount
 Instalment Amount Instalment Amount
 Escalation Percentage Escalation Percentage
 Billing Frequency Billing Frequency
 Finance Party Finance Party
 Finance Collects Finance Collects
 Fixed Service Fee Fixed Service Fee
 Fixed Admin Fee Fixed Admin Fee
 Fixed Insurance Fixed Insurance
 Other Fee 1 Other Fee 1
 Other Fee 2 Other Fee 2

+ Item Usage

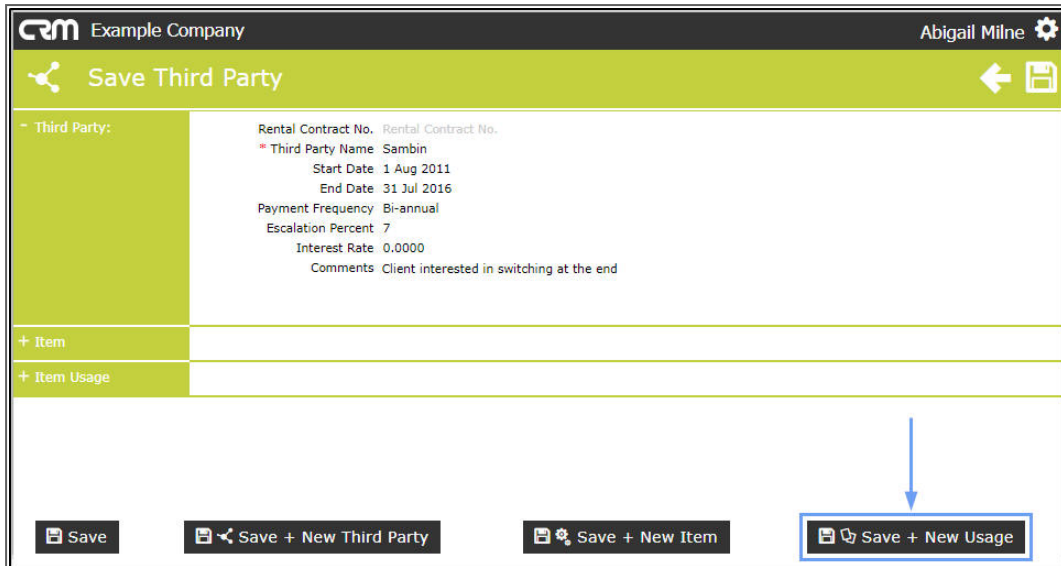
1 → 2

Save Save + New Third Party Save + New Item Save + New Usage

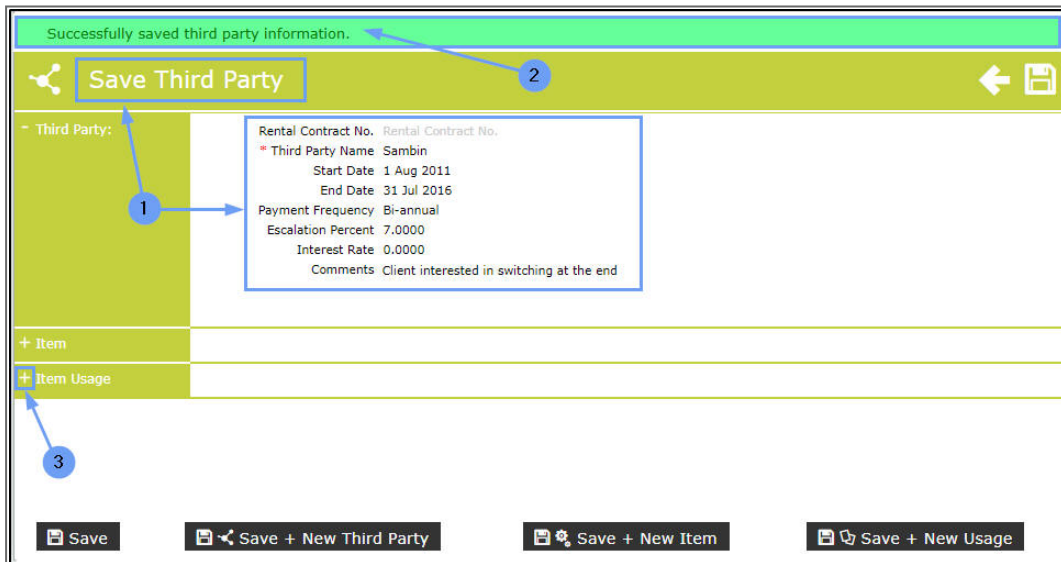
SAVE + NEW USAGE

(saves all details and adds new usage for the same machine)

- If you click on **Save + New Usage**,



1. The page will **refresh** but the Third Party details will remain in this page, ready for you to add a new item usage for this Third Party to the **Item Usage** section.
2. A message bar will appear at the top of the page stating;
 - **Successfully saved third party information.**
3. Click on the **expand** icon in front of **Item Usage**.



1. The **Item Usage** section will **expand** and the details will have been cleared, ready for you to add new Item Usage details.
2. When you have added the new Item Usage details, select the appropriate **Save option** to save your changes.

Successfully saved third party information.

Save Third Party

- Third Party:

Rental Contract No. Rental Contract No.
 * Third Party Name Sambin
 Start Date 1 Aug 2011
 End Date 31 Jul 2016
 Payment Frequency Bi-annual
 Escalation Percent 7.0000
 Interest Rate 0.0000
 Comments Client interested in switching at the end

+ Item

- Item Usage

* Note: Usage information will only be saved if you select a Usage/Meter Type and valid Item information is provided above.

* Usage/Meter Type Usage/Meter Type
 Minimum Billing Minimum Billing
 Free Usage Qty Free Usage Qty
 Average Qty Average Qty
 Per Unit Charge Per Unit Charge
 Tier 1 Unit Charge Tier 1 Unit Charge
 Tier 1 Usage Limit Tier 1 Usage Limit
 Tier 2 Unit Charge Tier 2 Unit Charge
 Tier 2 Usage Limit Tier 2 Usage Limit
 Escalation Percentage Escalation Percentage
 Billing Frequency Billing Frequency
 Average 6 Month Spend Average 6 Month Spend
 Month 1 Spend Month 1 Spend
 Month 2 Spend Month 2 Spend
 Month 3 Spend Month 3 Spend
 Month 4 Spend Month 4 Spend
 Month 5 Spend Month 5 Spend
 Month 6 Spend Month 6 Spend

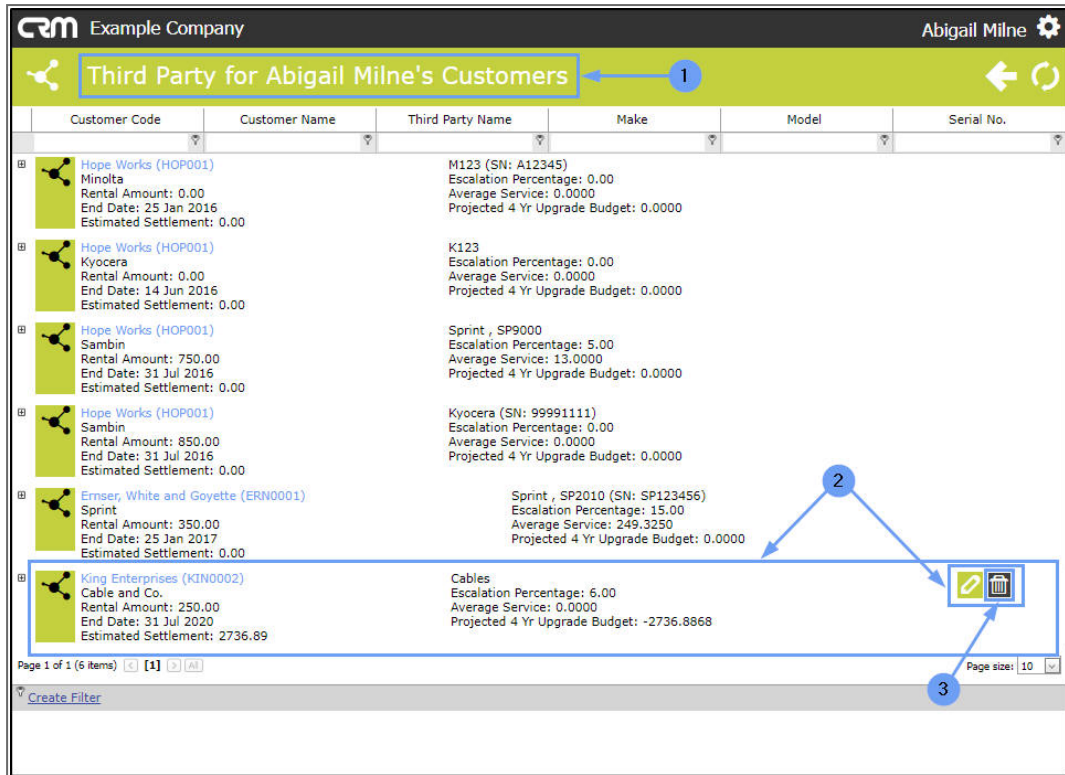
1 →

2 →

Save Save + New Third Party Save + New Item Save + New Usage

DELETE THIRD PARTY 'MAIN' INFORMATION

1. In the **Third Party for [Salesman's Name] Customers** page
2. Hover over a selected Third Party summary to reveal the **Action Item** buttons:
3. Click on the **Delete this Third Party** button.



1. A message box will pop up asking;
 - ***Are you sure you want to delete this? You cannot undo these changes.***
2. Click on **Ok**.

The screenshot shows a CRM interface for 'Example Company' with a user 'Abigail Milne'. A confirmation dialog box is overlaid on the screen, asking 'Are you sure you want to delete this? You cannot undo these changes.' with 'OK' and 'Cancel' buttons. A blue circle '1' points to the trash icon in the table, and a blue circle '2' points to the 'OK' button. The table contains the following data:

Customer Code	Customer	Model	Serial No.
Hope Works (HOP001)	Minolta		
Hope Works (HOP001)	Kyocera	K123	
Hope Works (HOP001)	Sambin	Sprint , SP9000	
Hope Works (HOP001)	Sambin	Kyocera (SN: 99991111)	
Ernser, White and Goyette (ERN0001)	Sprint	Sprint , SP2010 (SN: SP123456)	
King Enterprises (KIN0002)	Cable and Co.	Cables	

1. The Third Party will be **removed** from the page.
2. The **Page Reference** field will adjust to account for the deleted Third Party.

Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
Hope Works (HOP001)	Minolta	M123 (SN: A12345)	Escalation Percentage: 0.00	Average Service: 0.0000	Projected 4 Yr Upgrade Budget: 0.0000
Hope Works (HOP001)	Kyocera	K123	Escalation Percentage: 0.00	Average Service: 0.0000	Projected 4 Yr Upgrade Budget: 0.0000
Hope Works (HOP001)	Sambin	Sprint, SP9000	Escalation Percentage: 5.00	Average Service: 13.0000	Projected 4 Yr Upgrade Budget: 0.0000
Hope Works (HOP001)	Sambin	Kyocera (SN: 99991111)	Escalation Percentage: 0.00	Average Service: 0.0000	Projected 4 Yr Upgrade Budget: 0.0000
Ermsr, White and Goyette (ERN0001)	Sprint	Sprint, SP2010 (SN: SP123456)	Escalation Percentage: 15.00	Average Service: 249.3250	Projected 4 Yr Upgrade Budget: 0.0000

Page 1 of 1 (5 items) [1] [2] [3] [4] [5] [6] [7] [8] [9] [10]

Page size: 10

Create Filter

VIEW / EDIT / ADD THIRD PARTY 'ITEM' INFORMATION

This *Item* section allows you to save information regarding the equipment item itself.

These details are **important** to include, particularly the amounts (e.g. Instalment amount, Service and Admin fees etc.) as you will take all these figures into account (as well as the Item Usage figures) when creating your **proposal** or **quote**. The aim will be to create a better deal for this customer to win their custom.

Note: If you need to add multiple equipment items, you can select **Save + New Item** to add another equipment item.

You can navigate to the (edit) *Item* details frame in 2 ways:

Either

1. In the **Third Party for [Salesman's Name] Customers** page
2. Hover over a Third Party summary to reveal the **Action Item** buttons:
3. Click on the **View / Edit this Third Party** button.

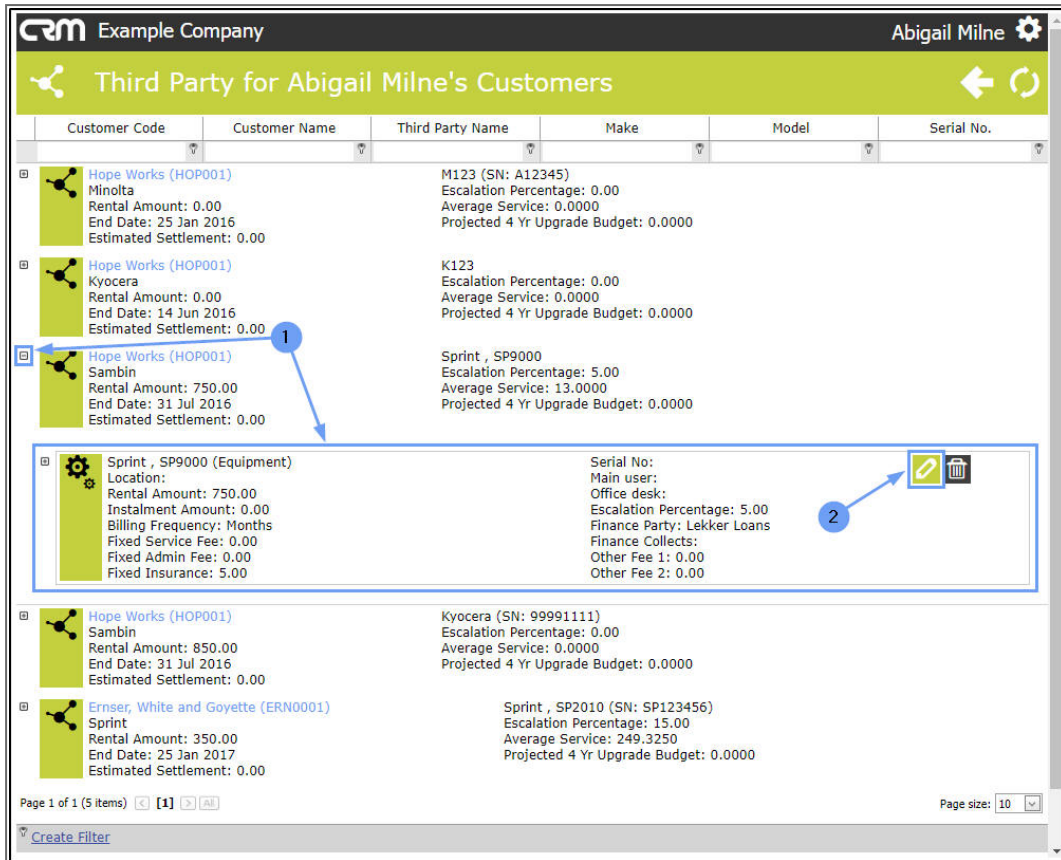


1. The **Save Third Party** page will open.
2. Click on the expand icon in front of **Item**.



Or

1. In the **Third Party for [Salesman's Name] Customers** page
2. Expand the selected Third Party summary to reveal the **Item** summary.
3. Hover over the Item summary to reveal the Action buttons and click on the **View / Edit this Third Party** button.



1. The **Save Third Party** page will open.
2. The **Item** frame will be auto-expanded ready for you to make changes.
3. **Add** or **Edit** the Item information as required:
 - **Item Type:** Select from the drop-down menu the type e.g. Toners, Spares, Accessories.
 - **Make:** Select from the drop-down menu the make e.g. Kyocera
 - **Model:** Type in the Model No. of the item.
 - **Serial Number:** Type in the Serial No. of the item.
 - **Location:** Type in the location of the item.
 - **Description:** Type in a brief description of the item.

- **Main User:** Type in the name of the user who mainly uses this item, if applicable.
- **Office Desk No:** Type in the office desk number of the user, if applicable.
- **Rental Amount:** Type in or use the directional arrows to select the rental amount.
- **Instalment Amount :** Type in or use the directional arrows to select the instalment amount that is being paid.
- **Escalation Percentage:** Type in or use the directional arrows to select the escalation percentage of this particular item.
- **Billing Frequency:** Select from the drop-down list the billing frequency e.g. months, quarterly.

CRM Example Company Abigail Milne

Save Third Party

+ Third Party:

- Item

Item Type Equipment
 * Make Sprint
 Model SP9000
 Serial Number Serial number
 Location Location
 Description Description

Main User Main User
 Office Desk No Office Desk No
 Rental Amount 750.0000
 Instalment Amount 0.0000
 Escalation Percentage 5.0000
 Billing Frequency Months

Finance Party Lekker Loans
 Finance Collects Finance Collects
 Fixed Service Fee 0.0000
 Fixed Admin Fee 0.0000
 Fixed Insurance 5.0000
 Other Fee 1 0.0000
 Other Fee 2 0.0000

- Item Usage

* Note: Usage information will only be saved if you select a Usage/Meter Type and valid Item information is provided above.
 * Usage/Meter Type Usage/Meter Type
 Minimum Billing Minimum Billing
 Free Usage Qty Free Usage Qty
 Average Qty Average Qty

Save Save + New Third Party Save + New Item Save + New Usage

- **Finance Party:** Type in the Finance Party name.
- **Finance Collects:** Select **Yes** if the Finance Party collects the fee and **No** if not.
- **Fixed Service Fee:** If there is a fixed Service Fee, either type in or use the directional arrows to select this fee amount.
- **Fixed Admin Fee :** If there is a fixed Admin Fee, either type in or use the directional arrows to select this fee amount.
- **Fixed Insurance:** If there is a fixed Service Fee, either type in or use the directional arrows to select this fee amount.
- **Other Fee 1 - 2 :** Use these fields to add any additional fees (not listed here) that may be linked to this third party, if applicable.

CRM Example Company Abigail Milne

Save Third Party

+ Third Party:

- Item

Item Type Equipment
 * Make Sprint
 Model SP9000
 Serial Number Serial number
 Location Location
 Description Description

Main User Main User
 Office Desk No Office Desk No
 Rental Amount 750.0000
 Instalment Amount 0.0000
 Escalation Percentage 5.0000
 Billing Frequency Months
 Finance Party Lekker Loans
 Finance Collects Finance Collects
 Fixed Service Fee 0.0000
 Fixed Admin Fee 0.0000
 Fixed Insurance 5.0000
 Other Fee 1 0.0000
 Other Fee 2 0.0000

- Item Usage

* Note: Usage information will only be saved if you select a Usage/Meter Type and valid Item information is provided above.
 * Usage/Meter Type Usage/Meter Type
 Minimum Billing Minimum Billing
 Free Usage Qty Free Usage Qty
 Average Qty Average Qty

Save Save + New Third Party Save + New Item Save + New Usage

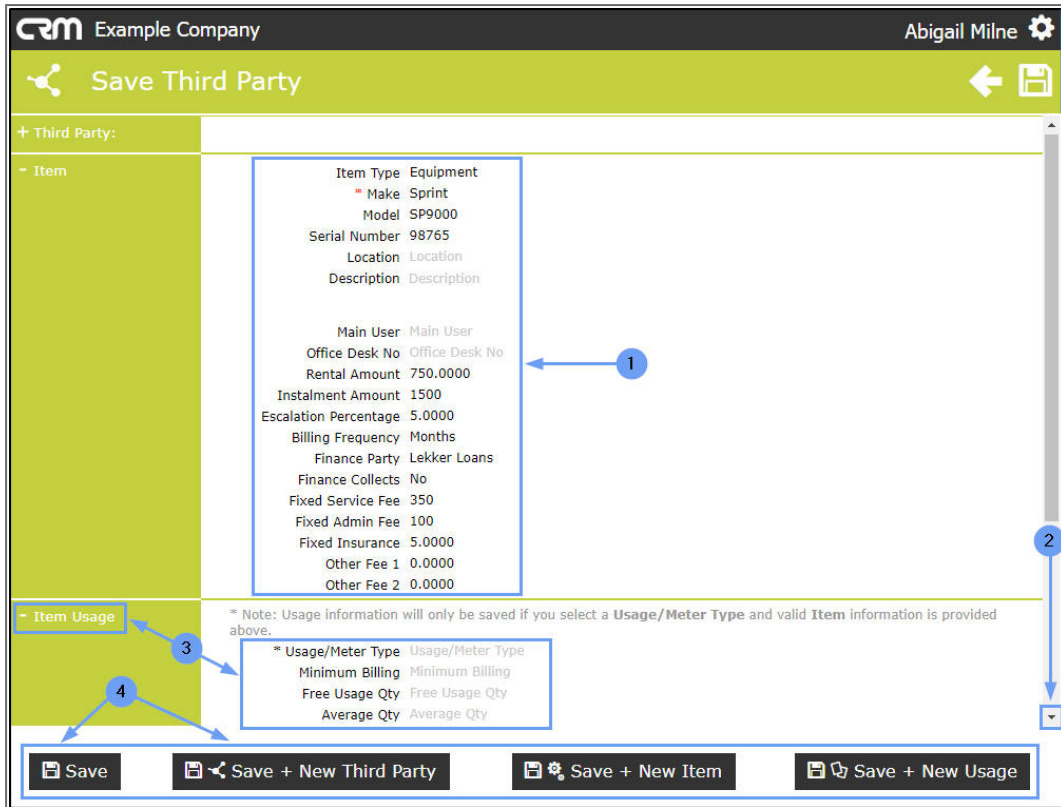
1. Once you have edited the Item details as required, you have several choices:

Either

2. Scroll down the page to view all the Item Usage details.
3. [Add or Edit the Item Usage](#) information as required.

Or

4. Select one of the [Save Options](#) as explained above.



DELETE THIRD PARTY 'ITEM' INFORMATION

1. In the *Third Party for [Salesman's Name] Customers* page,
2. **Expand** the selected Third Party summary to display the *Item summary*.
3. **Hover over** this Item summary to reveal the *Actions buttons*.
4. Note that the *Page Reference field* states that there are currently **6** items.
5. Click on the **Delete** button.

The screenshot displays a CRM interface for 'Example Company' with the user 'Abigail Milne'. The main content area shows a list of 'Third Party for Abigail Milne's Customers'. Each item includes details such as rental amount, end date, and estimated settlement. The selected item is 'Hope Works (HOP001) Minolta', which is expanded to show equipment details like 'Kyocera, Delux (Equipment)' with its location, rental amount, and various fees. At the bottom, there is a pagination control showing 'Page 1 of 1 (6 items)' and a 'Page size' dropdown set to 10. A 'Create Filter' link is also visible.

1. A message box will pop up asking;
 - ***Are you sure you want to delete this item? You cannot undo these changes.***
2. Click on **OK**.

localhost:50000 says
Are you sure you want to delete this item? You cannot undo these changes.

2 → OK Cancel

1

Item Name	Details
Rental Amount: 0.00 End Date: 25 Jan 2016 Estimated Settlement: 0.00	
Hope Works (HOP001) Kyocera Rental Amount: 0.00 End Date: 14 Jun 2016 Estimated Settlement: 0.00	K123 Escalation Percentage: 0.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: 0.0000
Hope Works (HOP001) Sambin Rental Amount: 750.00 End Date: 31 Jul 2016 Estimated Settlement: 0.00	Sprint , SP9000 Escalation Percentage: 5.00 Average Service: 13.0000 Projected 4 Yr Upgrade Budget: 0.0000
Hope Works (HOP001) Sambin Rental Amount: 850.00 End Date: 31 Jul 2016 Estimated Settlement: 0.00	Kyocera (SN: 99991111) Escalation Percentage: 0.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: 0.0000
Hope Works (HOP001) Minolta Rental Amount: 550.00 End Date: 25 Jan 2016 Estimated Settlement: 0.00	Kyocera , Delux (SN: KD9876) Escalation Percentage: 5.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: 0.0000
Kyocera , Delux (Equipment) Location: Rental Amount: 550.00 Instalment Amount: 1500.00 Billing Frequency: Months Fixed Service Fee: 350.00 Fixed Admin Fee: 150.00 Fixed Insurance: 100.00	Serial No: KD9876 Main user: John Smith Office desk: 12 Escalation Percentage: 5.00 Finance Party: Finance Collects: Other Fee 1: 0.00 Other Fee 2: 0.00
Ernser, White and Goyette (ERN0001) Sprint Rental Amount: 350.00 End Date: 25 Jan 2017 Estimated Settlement: 0.00	Sprint , SP2010 (SN: SP123456) Escalation Percentage: 15.00 Average Service: 249.3250 Projected 4 Yr Upgrade Budget: 0.0000

Page 1 of 1 (6 items) [1] [Alt]

Page size: 10

Create Filter

- The screen will refresh and the deleted item will be removed. The Page Reference field will adjust to reflect the reduced number of items.

Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
Hope Works (HOP001)	Minolta	M123 (SN: A12345)			
	Rental Amount: 0.00	Escalation Percentage: 0.00			
	End Date: 25 Jan 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Kyocera	K123			
	Rental Amount: 0.00	Escalation Percentage: 0.00			
	End Date: 14 Jun 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Sambin	Sprint , SP9000			
	Rental Amount: 750.00	Escalation Percentage: 5.00			
	End Date: 31 Jul 2016	Average Service: 13.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Sambin	Kyocera (SN: 99991111)			
	Rental Amount: 850.00	Escalation Percentage: 0.00			
	End Date: 31 Jul 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Minolta	Kyocera , Delux (SN: KD9876)			
	Rental Amount: 550.00	Escalation Percentage: 5.00			
	End Date: 25 Jan 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			

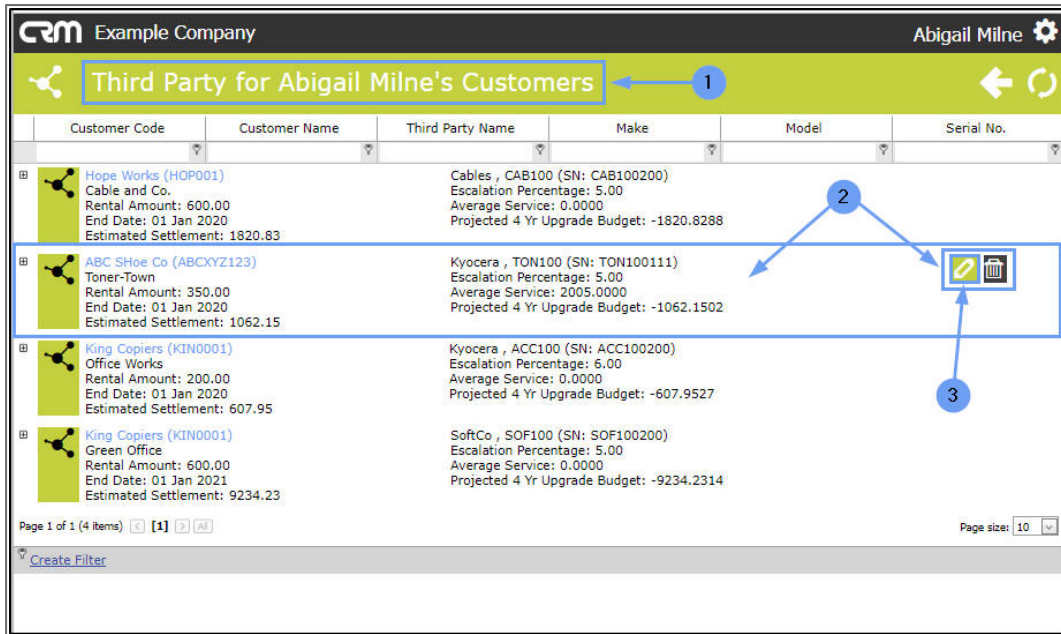
VIEW / EDIT / ADD THIRD PARTY ' ITEM USAGE' INFORMATION

These details are **important** to include, if available as you will also take all these figures into account (as well as the **Item** figures) when creating your **proposal** or **quote**. The aim being to create a better deal for this customer to win their custom.

You can navigate to the **Item Usage** frame in 2 ways:

Either

1. In the **Third Party for [Salesman's Name] Customers** page
2. Hover over a Third Party summary to reveal the **Action Item** buttons:
3. Click on the **View/Edit this Third Party** button.

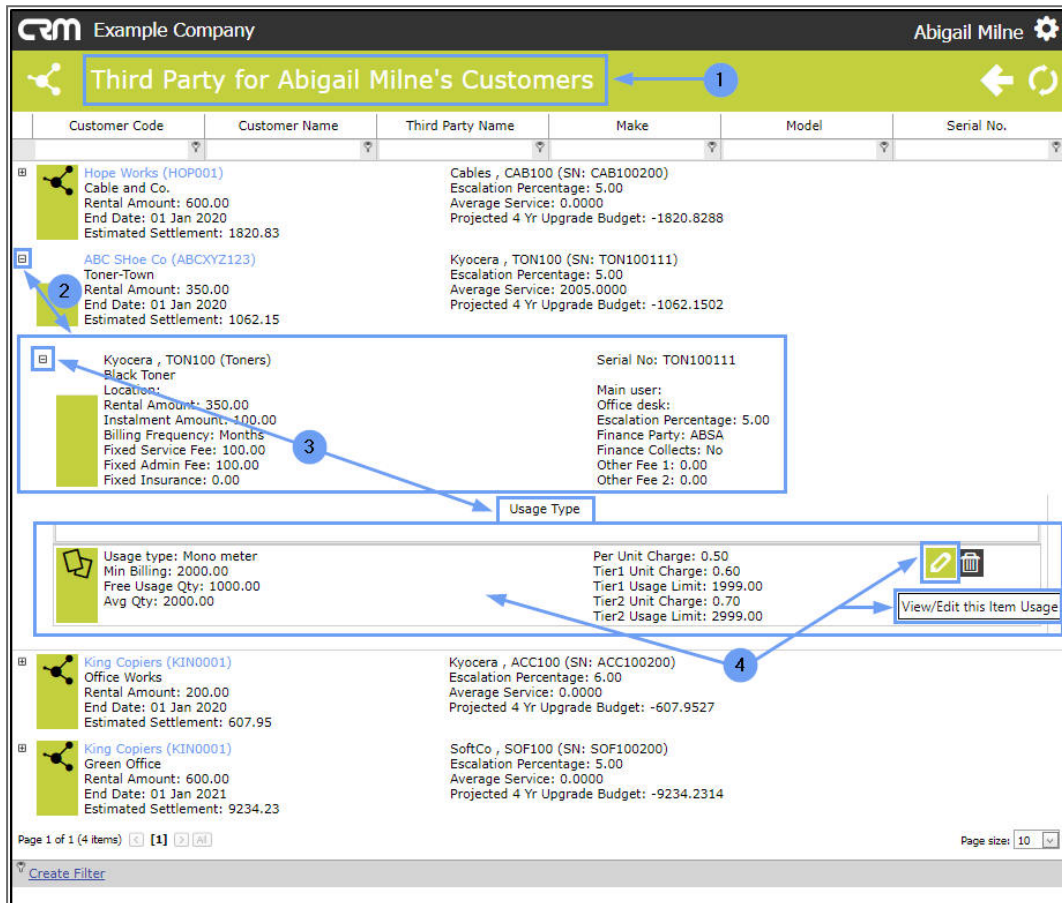


1. The **Save Third Party** page will open.
2. Click on the expand icon in front of **Item Usage**.



Or

1. In the **Third Party for [Salesman's Name] Customers** page
2. **Expand** the selected Third Party Main Information summary to reveal the **Item** summary.
3. **Expand** this Item summary to reveal the Item **Usage Type** summary.
4. **Hover over** the Item Usage Type summary to reveal the Action buttons and click on the **View / Edit this Item Usage** Action button.

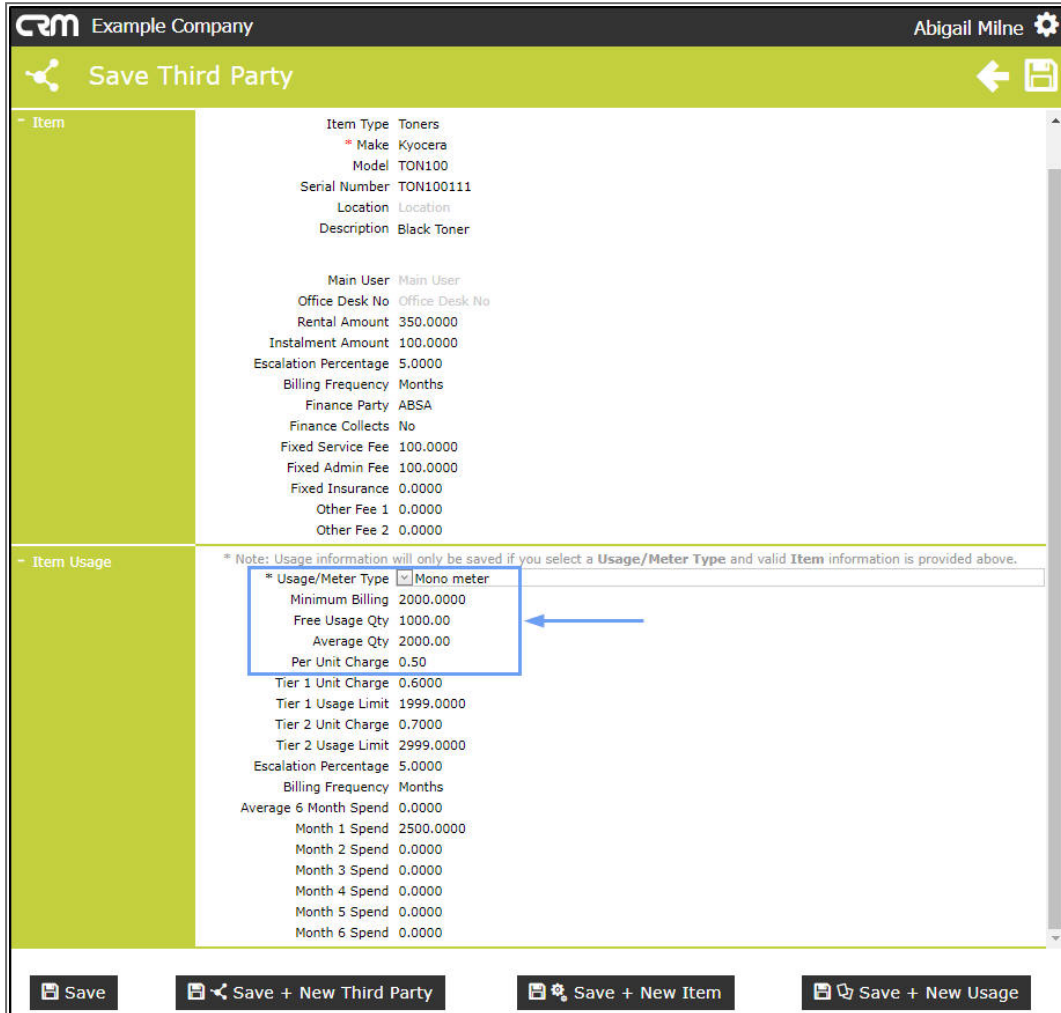


1. The **Save Third party** page will open.
2. Both the **Item** frame and the
3. **Item Usage** frame will be expanded ready for you to Add / Edit / Delete Item and Item Usage information.
4. The reason that both frames are auto-expanded is explained in the **Note** found at the top of the Item Usage frame:

* **Note:** Usage information will only be saved if you select a Usage/Meter Type and valid Item information is provided above.

- **Add** or **Edit** the Item Usage information as required:
 - **Usage / Meter Type:** Select from the drop-down menu the type e.g. Mono meter, Colour A3.
 - **Minimum Billing:** Either type in or use the arrow indicators to select the minimum billing amount (in Rand value), if applicable
 - **Free Usage Qty:** Either type in or use the arrow indicators to select the free usage quantity, if applicable.

- **Average Qty:** Either type in or use the arrow indicators to select the average usage quantity.
- **Per Unit Charge:** Either type in or use the arrow indicators to select the per unit charge.



CRM Example Company Abigail Milne

Save Third Party

Item

Item Type Toners
 * Make Kyocera
 Model TON100
 Serial Number TON100111
 Location Location
 Description Black Toner

Main User Main User
 Office Desk No Office Desk No
 Rental Amount 350.0000
 Instalment Amount 100.0000
 Escalation Percentage 5.0000
 Billing Frequency Months
 Finance Party ABSA
 Finance Collects No
 Fixed Service Fee 100.0000
 Fixed Admin Fee 100.0000
 Fixed Insurance 0.0000
 Other Fee 1 0.0000
 Other Fee 2 0.0000

Item Usage

* Note: Usage information will only be saved if you select a Usage/Meter Type and valid Item information is provided above.

* Usage/Meter Type Mono meter
 Minimum Billing 2000.0000
 Free Usage Qty 1000.00
 Average Qty 2000.00
 Per Unit Charge 0.50
 Tier 1 Unit Charge 0.6000
 Tier 1 Usage Limit 1999.0000
 Tier 2 Unit Charge 0.7000
 Tier 2 Usage Limit 2999.0000
 Escalation Percentage 5.0000
 Billing Frequency Months
 Average 6 Month Spend 0.0000
 Month 1 Spend 2500.0000
 Month 2 Spend 0.0000
 Month 3 Spend 0.0000
 Month 4 Spend 0.0000
 Month 5 Spend 0.0000
 Month 6 Spend 0.0000

Save Save + New Third Party Save + New Item Save + New Usage

- **Tier 1 Unit Charge:**
- **Tier 1 Usage Limit:**
- **Tier 2 Unit Charge:**
- **Tier 2 Usage Limit:**

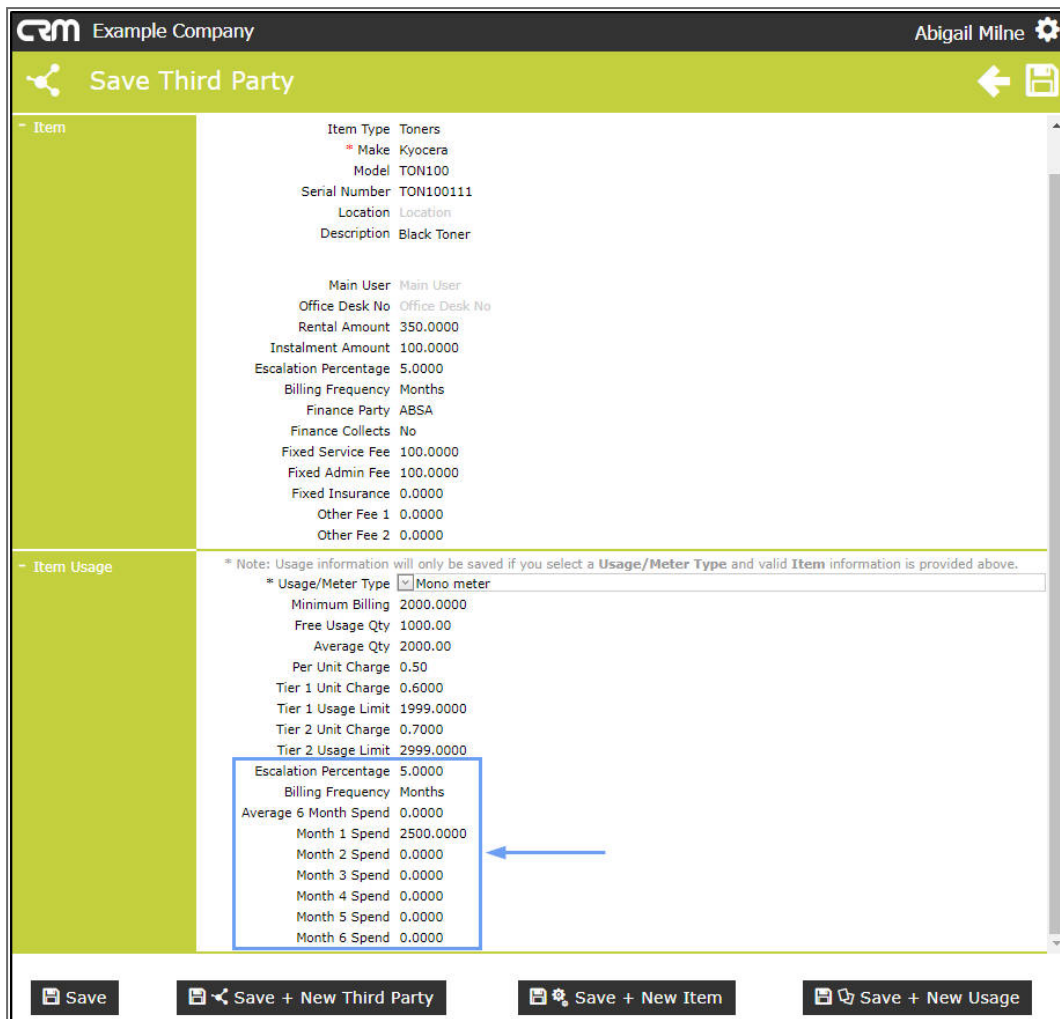
CRM Example Company
Abigail Milne

Save Third Party

Item	Item Type Toners * Make Kyocera Model TON100 Serial Number TON100111 Location Location Description Black Toner
Item Usage	* Note: Usage information will only be saved if you select a Usage/Meter Type and valid Item information is provided above. * Usage/Meter Type <input checked="" type="checkbox"/> Mono meter Minimum Billing 2000.0000 Free Usage Qty 1000.00 Average Qty 2000.00 Per Unit Charge 0.50 <div style="border: 1px solid blue; padding: 2px; display: inline-block;"> Tier 1 Unit Charge 0.6000 Tier 1 Usage Limit 1999.0000 Tier 2 Unit Charge 0.7000 Tier 2 Usage Limit 2999.0000 </div> Escalation Percentage 5.0000 Billing Frequency Months Average 6 Month Spend 0.0000 Month 1 Spend 2500.0000 Month 2 Spend 0.0000 Month 3 Spend 0.0000 Month 4 Spend 0.0000 Month 5 Spend 0.0000 Month 6 Spend 0.0000

Save
 Save + New Third Party
 Save + New Item
 Save + New Usage

- Escalation Percentage:
- Billing Frequency:
- Average 6 Month Spend:
- Month 1 Spend to Month 6 Spend:



CRM Example Company Abigail Milne

Save Third Party

Item

Item Type Toners
 * Make Kyocera
 Model TON100
 Serial Number TON100111
 Location Location
 Description Black Toner

Main User Main User
 Office Desk No Office Desk No
 Rental Amount 350.0000
 Instalment Amount 100.0000
 Escalation Percentage 5.0000
 Billing Frequency Months
 Finance Party ABSA
 Finance Collects No
 Fixed Service Fee 100.0000
 Fixed Admin Fee 100.0000
 Fixed Insurance 0.0000
 Other Fee 1 0.0000
 Other Fee 2 0.0000

Item Usage

* Note: Usage information will only be saved if you select a Usage/Meter Type and valid Item information is provided above.

* Usage/Meter Type Mono meter

Minimum Billing 2000.0000
 Free Usage Qty 1000.00
 Average Qty 2000.00
 Per Unit Charge 0.50
 Tier 1 Unit Charge 0.6000
 Tier 1 Usage Limit 1999.0000
 Tier 2 Unit Charge 0.7000
 Tier 2 Usage Limit 2999.0000
 Escalation Percentage 5.0000
 Billing Frequency Months
 Average 6 Month Spend 0.0000
 Month 1 Spend 2500.0000
 Month 2 Spend 0.0000
 Month 3 Spend 0.0000
 Month 4 Spend 0.0000
 Month 5 Spend 0.0000
 Month 6 Spend 0.0000

Save Save + New Third Party Save + New Item Save + New Usage

- When you have finished adding or editing the **Item Usage** information,

Either,

- Select one of the Save Options or

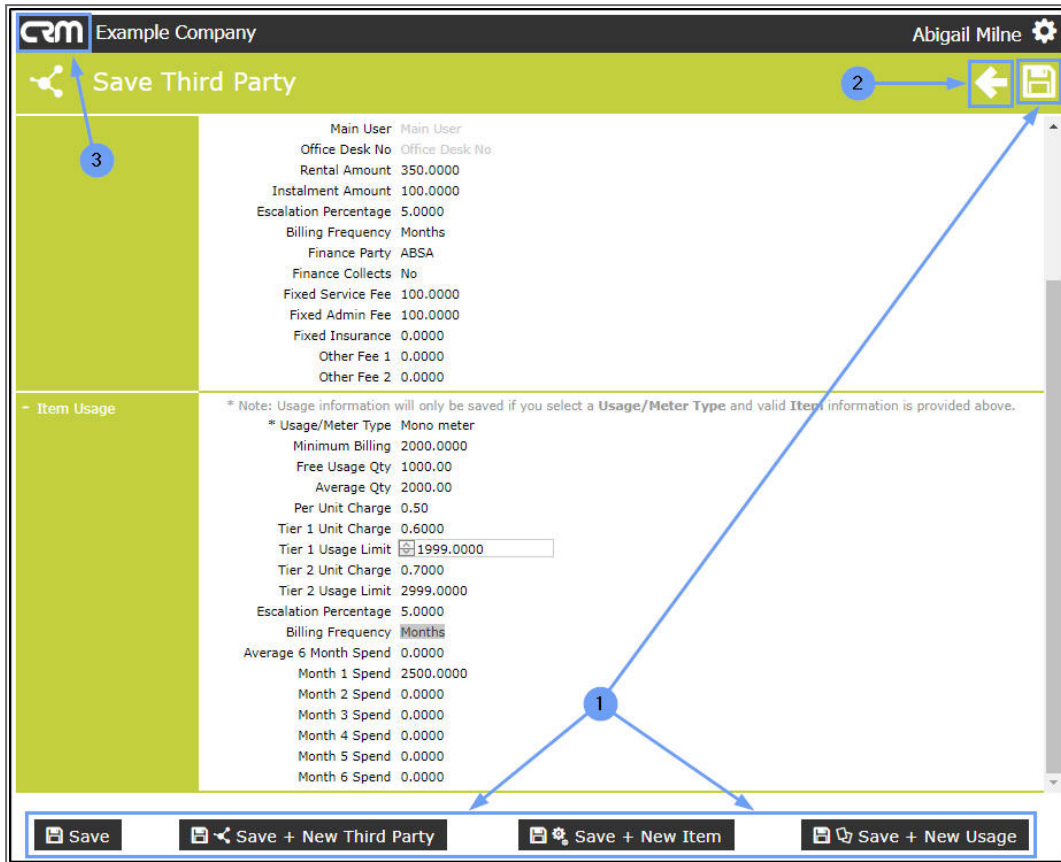
or,

- Click on **Back** to return to the **previous page** (any changes made will not be saved)

or,

- Click on the **CRM logo** to return to the **Dashboard** (Home page), (any changes made will not be saved).

Note: If you are adding equipment that has multiple meters - then select '**Save + New Usage**' to add another meter.



DELETE THIRD PARTY 'ITEM USAGE' INFORMATION

1. In the *Third Party for [Salesman's Name] Customers* page
2. **Expand** the selected Third Party *Main Information* summary to reveal the *Item* summary.
3. **Expand** this Item summary to reveal the Item *Usage Type* summary.
4. **Hover over** the Item Usage Type summary to reveal the *Action buttons*.
5. Click on the *Delete this Item Usage* Action button.

The screenshot displays a CRM interface for 'Example Company' with user 'Abigail Milne'. The main window is titled 'Third Party for Abigail Milne's Customers'. It contains a table with the following data:

Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
HOP001	Hope Works (HOP001) Cable and Co.	Cables , CAB100 (SN: CAB100200)			
ABCXY123	ABC SHoe Co (ABCXY123) Toner-Town	Kyocera , TON100 (SN: TON100111)			
KIN0001	King Copiers (KIN0001) Office Works	Kyocera , ACC100 (SN: ACC100200)			
KIN0001	King Copiers (KIN0001) Green Office	SoftCo , SOF100 (SN: SOF100200)			

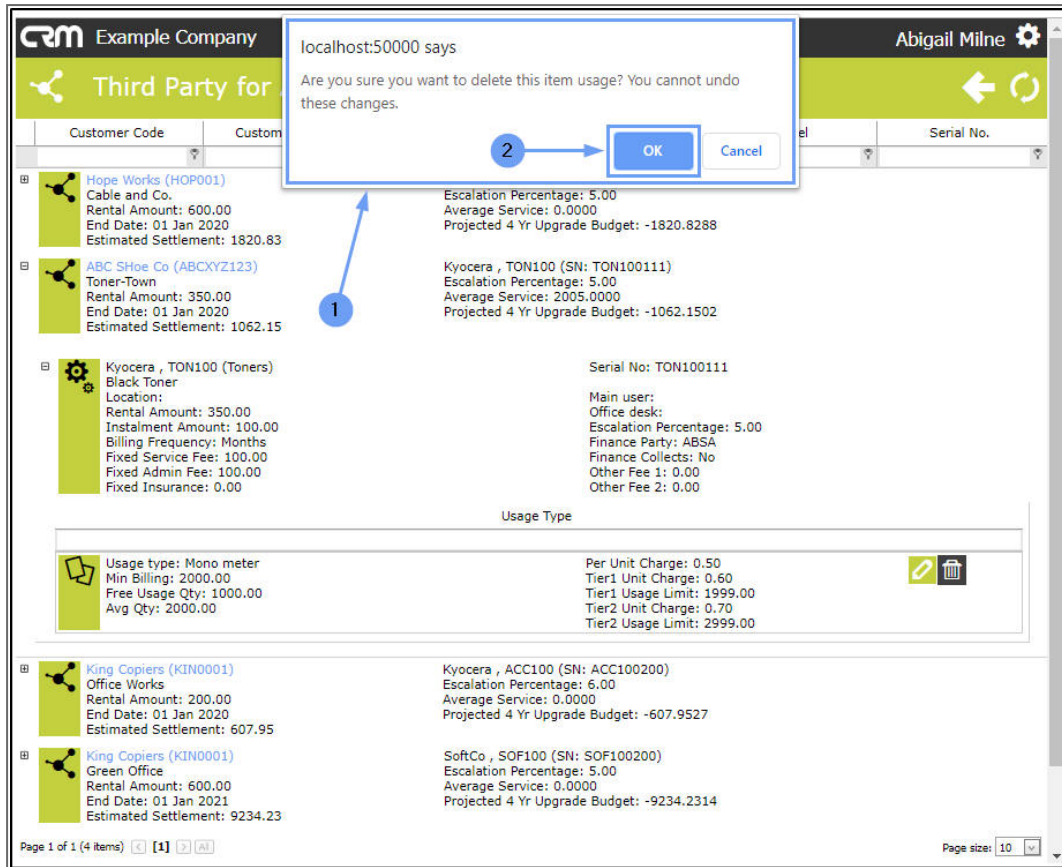
The detailed view for the selected 'Kyocera , TON100 (Toners) Black Toner' item shows the following information:

- Serial No: TON100111
- Usage Type: Mono meter
- Per Unit Charge: 0.50
- Tier1 Unit Charge: 0.60
- Tier1 Usage Limit: 1999.00
- Tier2 Unit Charge: 0.70
- Tier2 Usage Limit: 2999.00

Numbered callouts in the image indicate the following steps:

- 1: Points to the title bar of the window.
- 2: Points to the selection icon (a square with a plus sign) next to the 'ABC SHoe Co' row.
- 3: Points to the detailed view of the selected item.
- 4: Points to the delete icon (a trash can) in the detailed view.
- 5: Points to the 'Delete this Item Usage' dialog box that appears after clicking the delete icon.

1. A message box will pop up asking;
 - ***Are you sure you want to delete this item usage? You cannot undo these changes.***
2. Click on **OK**.



1. The screen will **refresh** and the deleted item usage type information will be **removed**.
2. The Usage Type frame will contain a **No data to display** message.
3. Click on **Back** to return to the previous page or,
4. Click on the **CRM logo** to return to the CRM Homepage.

CRM Example Company
Abigail Milne

← ↻

← ↻

Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
4	Hope Works (HOP001) Cable and Co. Rental Amount: 600.00 End Date: 01 Jan 2020 Estimated Settlement: 1820.83	Cables , CAB100 (SN: CAB100200) Escalation Percentage: 5.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: -1820.8288			
	ABC SHoe Co (ABCXY123) Toner-Town Rental Amount: 350.00 End Date: 01 Jan 2020 Estimated Settlement: 1062.15	Kyocera , TON100 (SN: TON100111) Escalation Percentage: 5.00 Average Service: 2005.0000 Projected 4 Yr Upgrade Budget: -1062.1502			
	Kyocera , TON100 (Toners) Black Toner Location: Rental Amount: 350.00 Instalment Amount: 100.00 Billing Frequency: Months Fixed Service Fee: 100.00 Fixed Admin Fee: 100.00 Fixed Insurance: 0.00	Serial No: TON100111 Main user: Office desk: Escalation Percentage: 5.00 Finance Party: ABSA Finance Collects: No Other Fee 1: 0.00 Other Fee 2: 0.00			
<div style="display: flex; justify-content: space-between; align-items: center;"> Usage Type 2 </div> <div style="text-align: center; border: 1px solid black; padding: 5px; width: 100%;"> No data to display </div>					
	King Copiers (KIN0001) Office Works Rental Amount: 200.00 End Date: 01 Jan 2020 Estimated Settlement: 607.95	Kyocera , ACC100 (SN: ACC100200) Escalation Percentage: 5.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: -607.9527			
	King Copiers (KIN0001) Green Office Rental Amount: 600.00 End Date: 01 Jan 2021 Estimated Settlement: 9234.23	SoftCo , SOF100 (SN: SOF100200) Escalation Percentage: 5.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: -9234.2314			

Page 1 of 1 (4 items) ← 1 → ⌵
Page size: 10 v

[Create Filter](#)

CRM.000.025