

CRM CUSTOMERS

CUSTOMERS DASHBOARD

The customers that you can view in CRM will be:

- the customers where you are the **main salesperson** or
- the customers where you are **linked** as a salesperson.

This list may include current BPO customers or **New CRM Customers**.

The **Customer Dashboard** is where you can view and access all of the selected customer details and information.

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

ACCESS THE CUSTOMER DASHBOARD

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

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

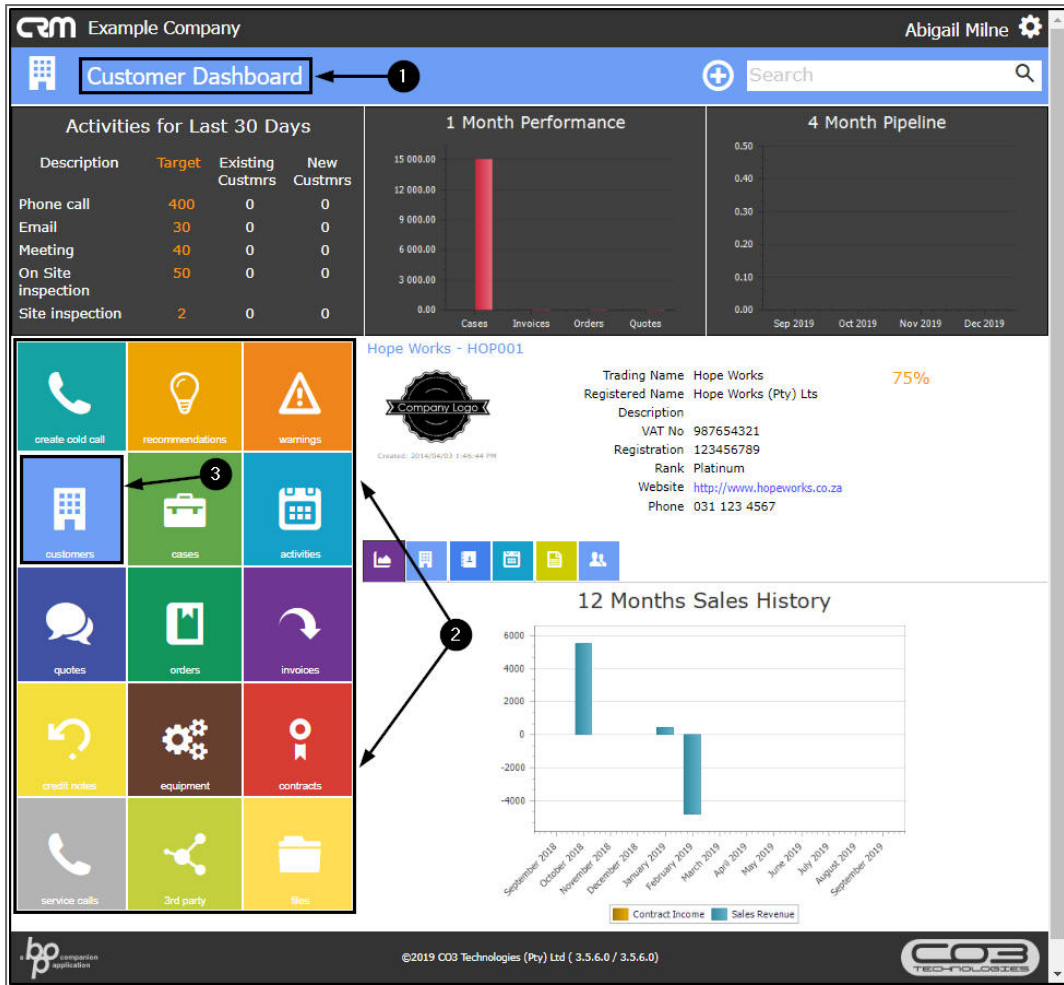
The screenshot shows the CRM interface for 'Example Company' with user 'Abigail Milne'. The main navigation bar includes a 'Customers' tile (callout 1) and a search filter (callout 4). Below is a table of customer records:

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	0210134506		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

At the bottom, the pagination shows 'Page 4 of 8 (74 items)' with a list of page numbers (1-8) and a 'Page size: 10' dropdown (callout 2).

VIEW CUSTOMER DASHBOARD TILES / PAGE LINKS

1. The **Customer Dashboard** (Customer Home page) will open.
2. Most of the page tiles will link you to information specific to the customer you have selected to view,
3. With the exception of the **Customers** tile which will take you back to the **Customers listing** page.



1. In this **Customer Dashboard**,
2. You will find the same tiles that you have available in the **Dashboard** (Home page):

- Create Cold Call
- Recommendations
- Warnings
- Customers
- Cases
- Activities
- Quotes



- [Equipment](#)
- [Third Party](#)

CRM Example Company

Dashboard

Activities for Last 30 Days

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

1 Month Per

 create cold call	30 Sep 2016 recommendations	0 warnings
74 customers	6 cases	6 activities
6 quotes	147 equipment	0 3rd party

Today
Recent
Calendar

comparison application

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CRM Example Company

🏢
Hope Works
1

Activities for Last 30 Days

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

1 Month Per

Category	Value
Cases	15 000.00
Invoices	0.00

📞
create cold call

💡
recommendations

⚠️
warnings

🏢
customers

📁
cases

📅
activities

💬
quotes

📄
orders

🔄
invoices

↶
credit notes

⚙️
equipment

🏆
contracts

📞
service calls

🌐
3rd party

📁
files

Hope Works - HOP001

Created: 2014/04/03 1:46:44 PM

📈
🏢
📄
📅

2

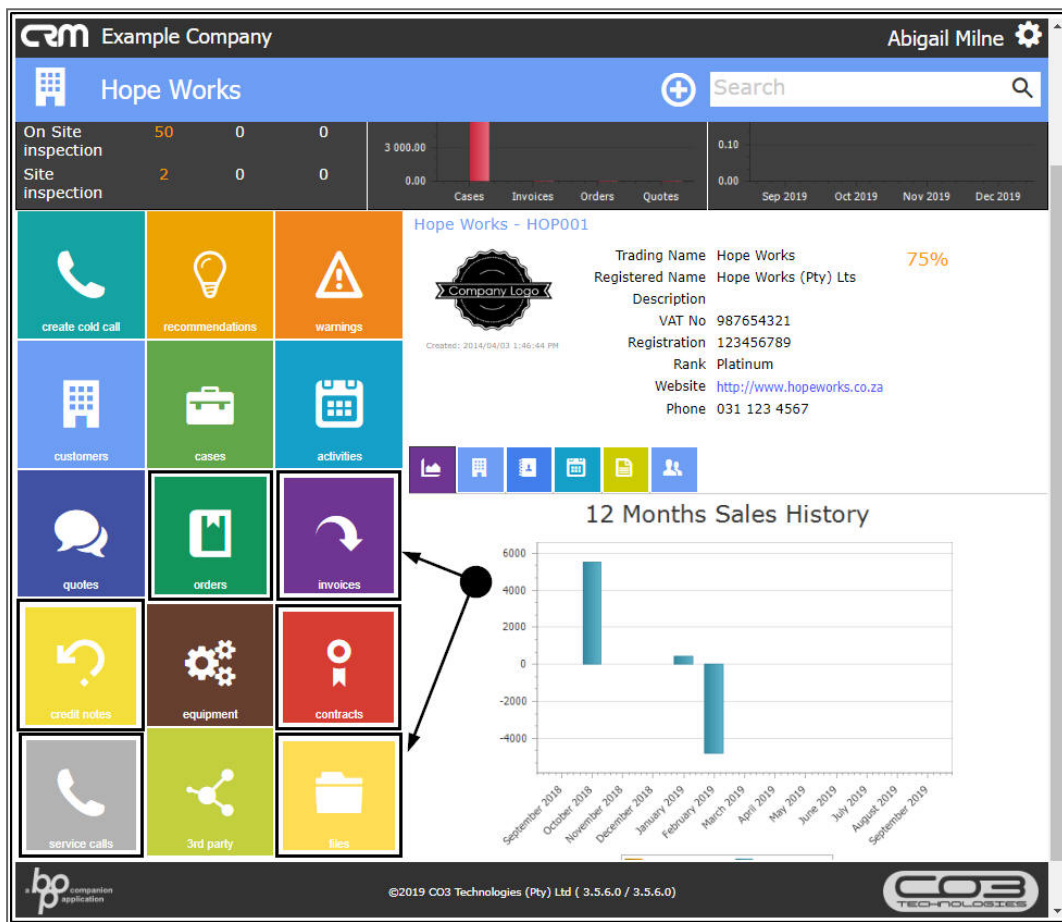
↖️ ↘️ ↙️ ↗️

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- You will also find the following additional Information tiles in this page:

- **Orders**
- **Invoices**
- **Credit Notes**
- **Contracts**
- **Service Calls**
- **Files**



VIEW CUSTOMER ACTION BUTTONS

- In the **Customer Dashboard** you can view and access the following information via the customer **Actions buttons**:

Note: Hover anywhere over the customer information frame to display these buttons.

- [View/Edit Customer](#)
- [Add Contact](#)
- [Add Third Party](#)
- [Add Note](#)
- [Release Customer](#)
- [Maintain Customer Salesmen](#)
- [Create Cold Call](#)
- [Add New Activity](#)
- [Add New Non-Case Related Quote](#)

2. Click on an individual button to direct you to the relevant **Action** page.



VIEW ADDITIONAL CUSTOMER DETAILS TILES

- You can also view and access more customer information via the customer *Details tiles* :
 - Sales
 - Addresses
 - Contacts
 - Open Activities
 - Notes
 - Salesmen

The screenshot shows a CRM dashboard for 'Example Company' with the user 'Abigail Milne'. The main section is for 'Hope Works' (HOP001). It features several key components:

- Activities for Last 30 Days:** A table showing activity counts for Phone call, Email, Meeting, On Site inspection, and Site inspection, with columns for Target, Existing Custmrs, and New Custmrs.
- 1 Month Performance:** A bar chart showing performance metrics for Cases, Invoices, Orders, and Quotes.
- 4 Month Pipeline:** A line chart showing the pipeline over the last four months (Sep 2019 to Dec 2019).
- Company Information:** Details for 'Hope Works' including Trading Name, Registered Name, Description, VAT No, Registration, Rank (Platinum), Website, and Phone.
- 12 Months Sales History:** A bar chart showing monthly sales revenue and contract income from September 2018 to September 2019.
- Navigation Grid:** A grid of 15 icons for various functions like 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. A red box highlights the 'Settings' icon (a gear) in the bottom right of the grid.

SETTINGS - 'HIDE DASHBOARD PANEL ON CUSTOMER PAGE' CHECKBOX

If you wish to have more space on this page to view your customer information more clearly, you can change your page **Settings**.

- Click on the **Settings** icon.



1. The **Setting panel** will be expanded.
2. Select the **'Hide dashboard panel on customer page'** checkbox.

The screenshot shows the CRM interface for 'Example Company' with user 'Abigail Milne'. The main dashboard for 'Hope Works' includes a table of activities for the last 30 days, a settings menu, and a 12-month sales history chart.

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	0
Email	30	0	0
Meeting	40	0	0
On Site	50	0	0
Inspection	2	0	0

<input type="checkbox"/>	Show items for subordinates
<input type="checkbox"/>	Exclude deleted customers in search on Cold Call screen
<input type="checkbox"/>	Hide dashboard panel
<input type="checkbox"/>	Hide dashboard panel on customer page

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

1. As you select the check box,
2. The **Dashboard panel** will disappear from the screen.

The screenshot shows the CO3 CRM interface for 'Example Company' user 'Abigail Milne'. The dashboard is titled 'Hope Works' and contains a grid of 18 functional tiles: 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, showing options like 'Show items for subordinates' and 'Hide dashboard panel'. A '12 Months Sales History' bar chart displays 'Contract Income' (yellow) and 'Sales Revenue' (blue) from September 2018 to September 2019. Annotations '1' and '2' point to the settings panel and the warnings tile.

Month	Contract Income	Sales Revenue
September 2018	0	0
October 2018	0	5000
November 2018	0	0
December 2018	0	0
January 2019	0	0
February 2019	0	0
March 2019	0	-4000
April 2019	0	0
May 2019	0	0
June 2019	0	0
July 2019	0	0
August 2019	0	0
September 2019	0	0

- Click outside of the Settings frame to view the full page without the Dashboard.

CRM Example Company
Abigail Milne

Hope Works

create cold call

recommendations

warnings

customers

cases

activities

quotes

orders

invoices

credit notes

equipment

contracts

service calls

3rd party

files

Hope Works - HOP001

Trading Name Hope Works 75%

Registered Name Hope Works (Pty) Lts

Description

VAT No 987654321

Registration 123456789

Rank Platinum

Website <http://www.hopeworks.co.za>

Phone 031 123 4567

Created: 2014/04/03 1:46:44 PM

12 Months Sales History

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

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