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.

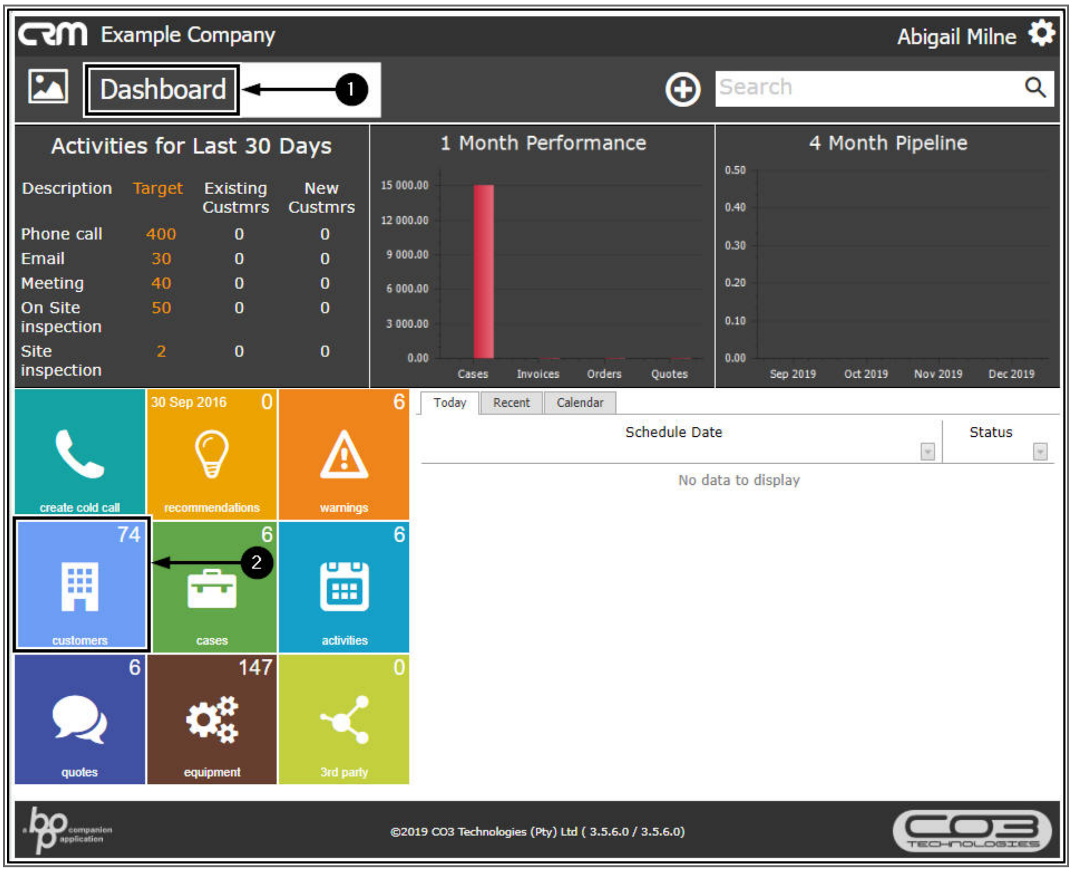
This list may include current BPO customers or New CRM Customers.

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

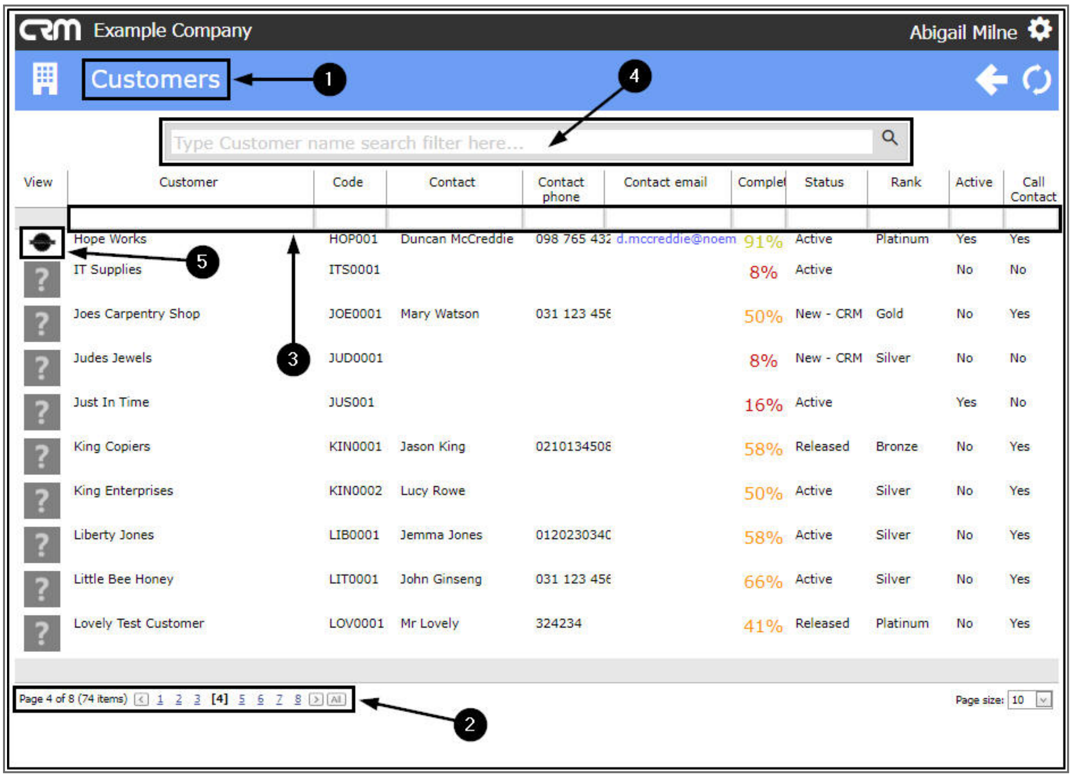
Ribbon Access: *Webpage > http://[servername]:[port-no]/BPOCRM/User.aspx*

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.

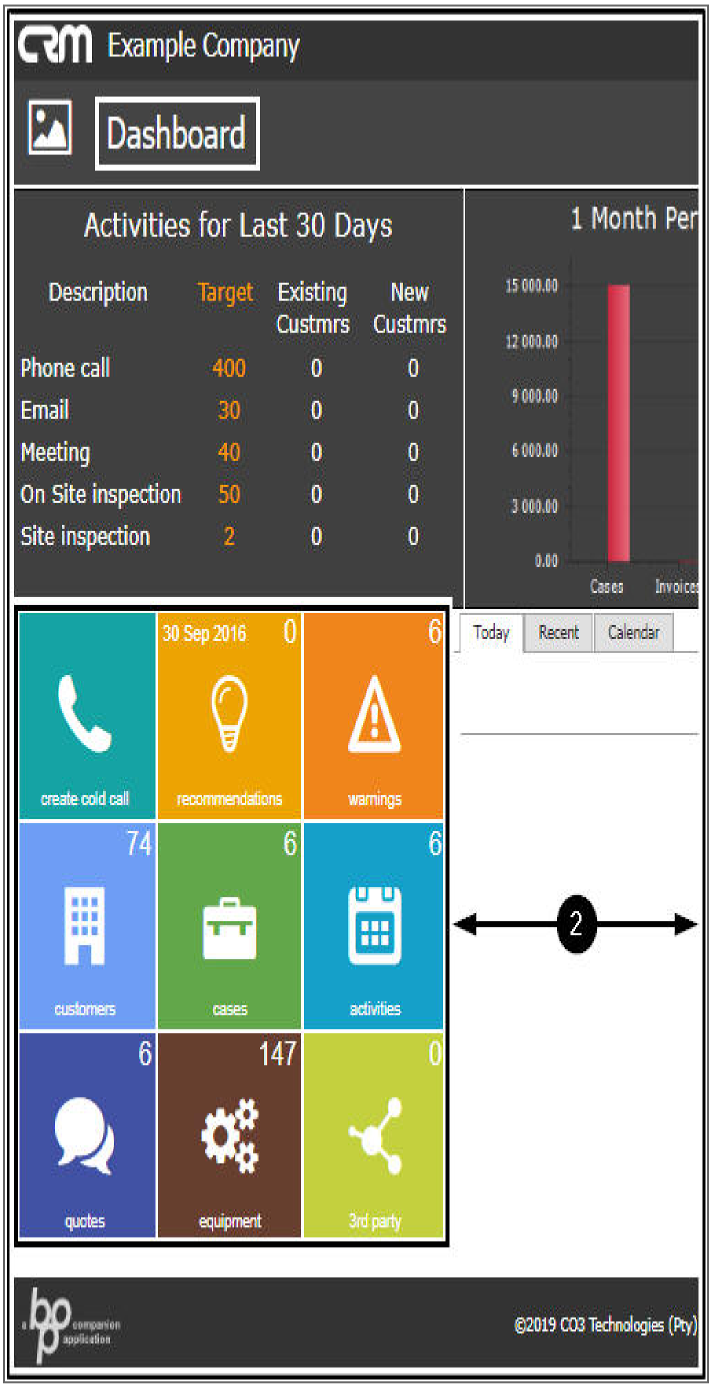


VIEW CUSTOMER DASHBOARD TILES / PAGE LINKS

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



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
15 000.00
12 000.00
9 000.00
6 000.00
3 000.00
0.00
Cases
Invoices
Today
Recent
Calendar
create cold call
30 Sep 2016
0
recommendations
6
warnings
74
customers
6
cases
6
activities
6
quotes
147
equipment
0
3rd party
2
companion application
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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
Cases
Hope Works - HOP001
Company Logo
create cold call
recommendations
warnings
customers
cases
activities
quotes
orders
invoices
credit notes
equipment
contracts
service calls
3rd party
files
2
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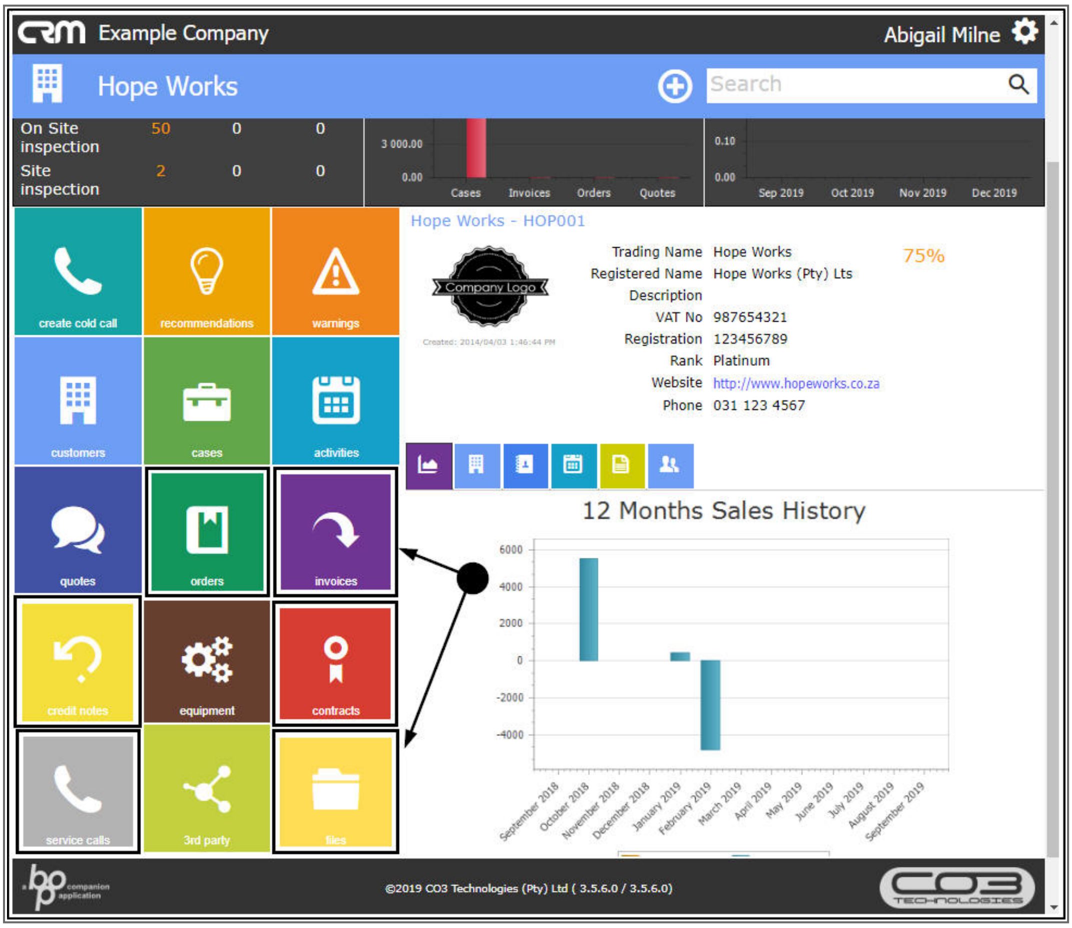
- You will also find the following additional Information tiles in this page:
  - Orders
  - Invoices
  - Credit Notes
  - Contracts
  - Service Calls
  - Files



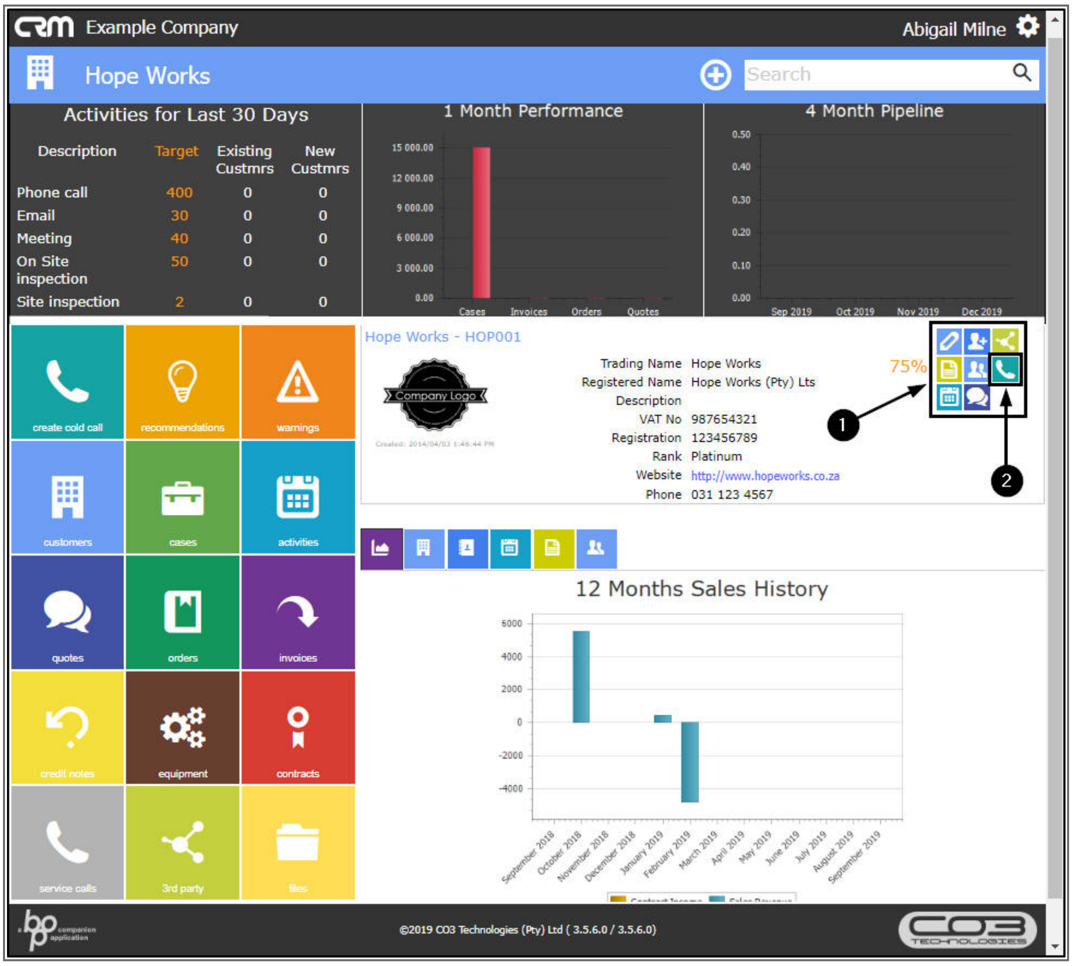
VIEW CUSTOMER ACTION BUTTONS

1. 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

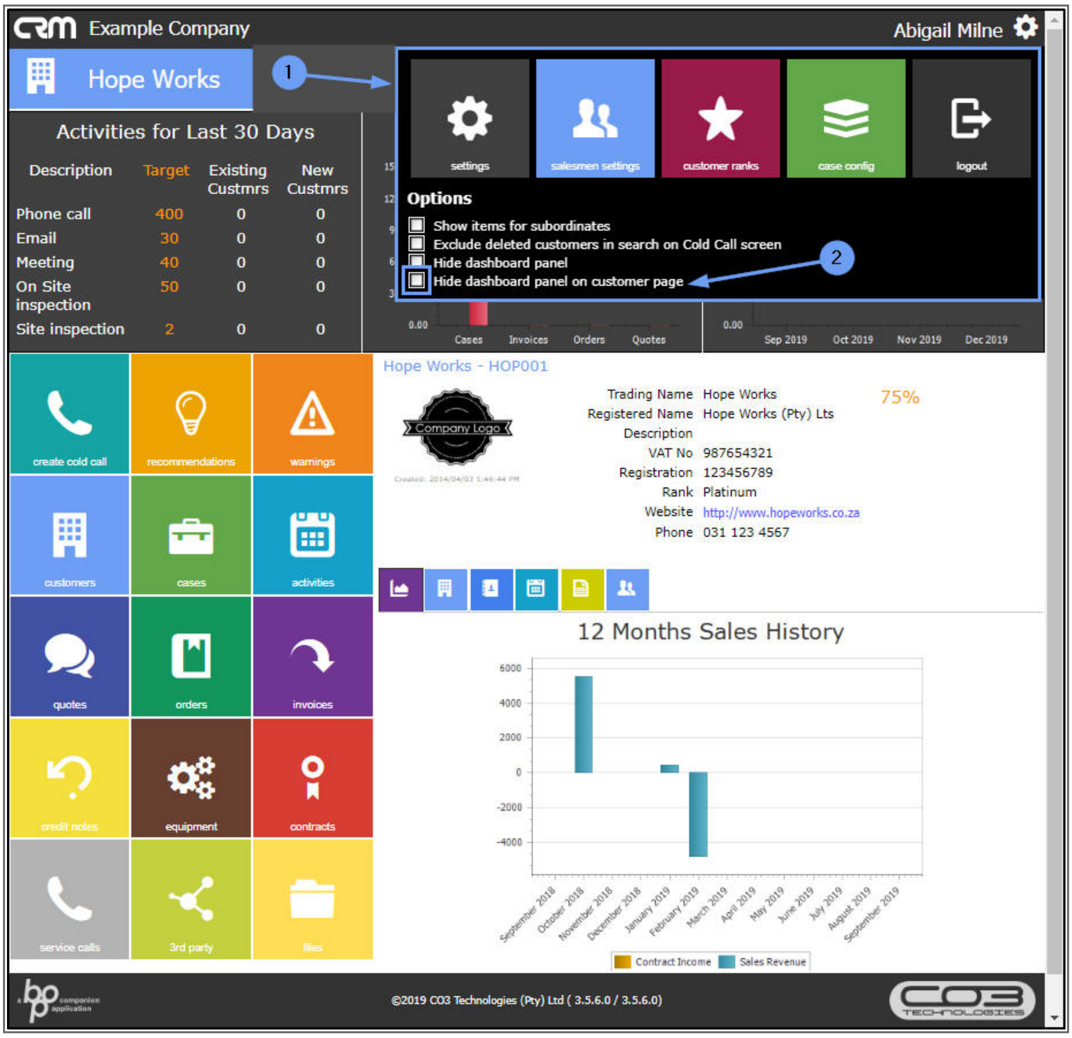
- You can also view and access more customer information via the customer ***Details tiles*** :
  - Sales
  - Addresses
  - Contacts
  - Open Activities
  - Notes
  - Salesmen

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***.

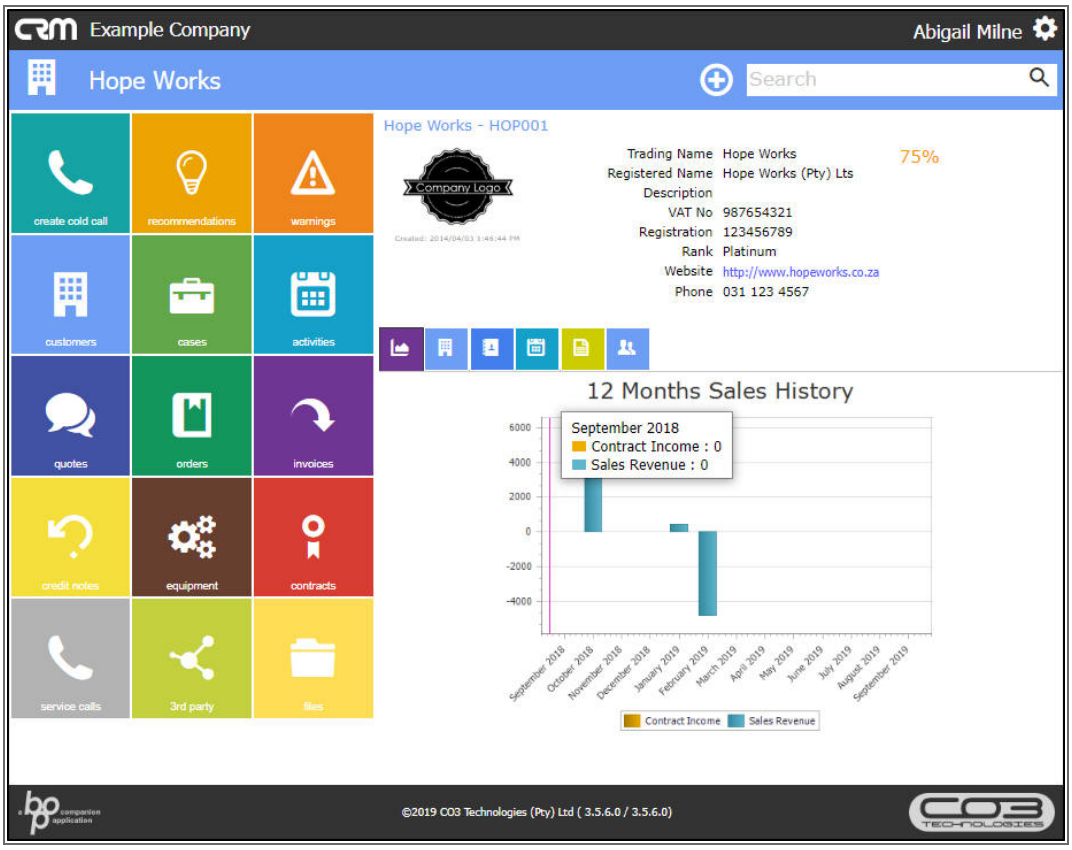
- Click on the ***Settings*** icon.

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



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

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


Example Company
Abigail Milne
Hope Works
Search
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
Registered Name Hope Works (Pty) Lts
Description
VAT No 987654321
Registration 123456789
Rank Platinum
Website http://www.hopeworks.co.za
Phone 031 123 4567
75%
12 Months Sales History
September 2018
Contract Income : 0
Sales Revenue : 0
Contract Income
Sales Revenue
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CRM.002.001