

CRM CUSTOMERS

CASES

A Case is like an opportunity: a reason to engage with a client in order to fulfill a sale requirement or propose a deal. A case gives rise to a **Quote** and subsequent New Deal.

A Case can be viewed as an umbrella over all the underlying Activities that work towards achieving a contract with that customer.

There is certain criteria required when dealing with Cases:

- A **Customer** is required in order to create a Case.
- A Case is required to raise an **Activity**.
- Only one Activity per Case can be open at a time.

Customer-specific Cases can be accessed from the **Customer Dashboard** (Customer Home page) as set out below.

A full list of Cases can be accessed from the Dashboard (Home page).

CRM will prompt you to create a new Case, when **raising a new activity** for a customer.

Quotes can be added to a Case from the **Cases for [selected customer]** listing page when using the following **Action** buttons:

- **View Case Info and History**
- **View/Edit this Case**
- **New Activity**
- **New Quote**

Ribbon Access: Webpage > `http://[servername]:[port-`

no]/BPOCRM/User.aspx

VIEW CUSTOMER SPECIFIC CASE LIST

from the **Customer Dashboard** (Home page)

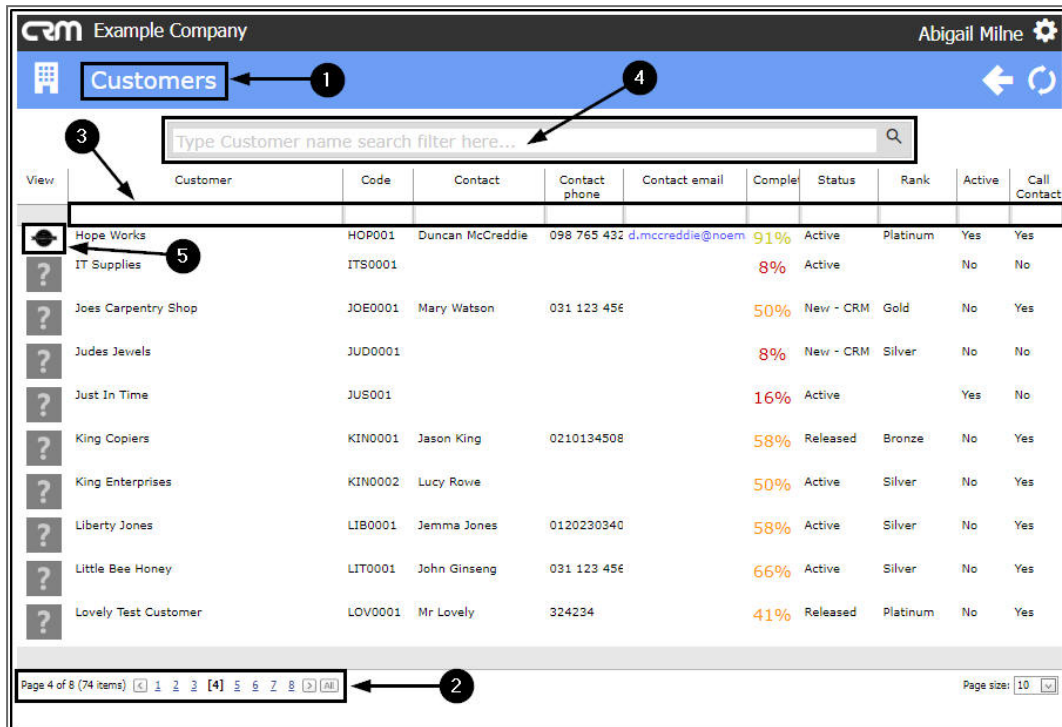
To access a customer specific list of Cases from the **Customer Dashboard** (Customer Home page). You will first need to navigate to the specific Customer Home page).

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

The screenshot shows the CRM interface for 'Example Company' with user 'Abigail Milne'. A blue box labeled '1' highlights the 'Dashboard' tab in the top navigation bar. Below the dashboard, there are several tiles: 'create cold call', 'recommendations', 'warnings', 'customers' (highlighted with a blue box and a blue arrow labeled '2'), 'cases', 'activities', 'quotes', 'equipment', and '3rd party'. The 'customers' tile shows a count of 75. To the right, there are charts for '1 Month Performance' and '4 Month Pipeline', and a calendar view showing an email event for 'King Copiers'.

1. The **Customers** listing page will open.
2. You can use the **Page Reference field** ,
3. the **Filter Row** or the

4. **Filter Text Box** to search for a specific customer.
5. Click on the selected customer icon in the **View** column.



1. The selected **Customer Dashboard** (Customer Home page) will open.
2. Click on the **Cases** tile.

The screenshot displays a CRM interface for 'Example Company' with user 'Abigail Milne'. The main view is for customer 'Hope Works' (ID: HOP001). The interface includes a navigation menu on the left with icons for 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The 'cases' icon is highlighted with a red circle and the number '2'. At the top, a search bar and a 'Hope Works' tab are visible, with a red circle and the number '1' pointing to the tab. The main content area shows a table of activities for the last 30 days, a 1-month performance bar chart, a 4-month pipeline chart, and a 12-month sales history bar chart. The 12-month sales history chart shows a significant drop in sales revenue in January 2019.

Description	Target	Existing Custmrs	New Custmrs
Phone call	20	4	3
Email	30	1	1
Meeting	20	0	2
On Site Inspection	20	0	0
Site inspection	2	0	0

1 Month Performance

Category	Value
Cases	~15,000.00
Invoices	~18,000.00
Orders	~12,000.00
Quotes	~45,000.00

4 Month Pipeline

Month	Value
Nov 2019	~0.10
Dec 2019	~0.10
Jan 2020	~0.10
Feb 2020	~0.10

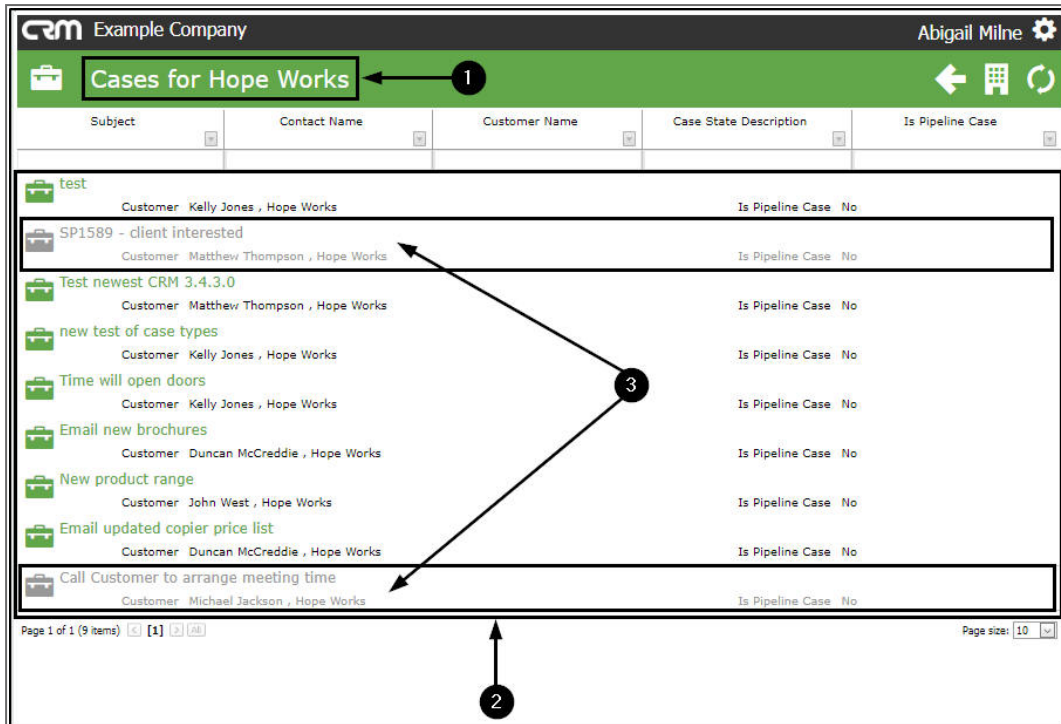
Hope Works - HOP001

Trading Name: Hope Works (91%)
Registered Name: Hope Works (Pty) Lts
Description: [Redacted]
VAT No: 987654321
Registration: 123456789
Rank: Platinum
Website: <http://www.hopeworks.co.za>
Phone: 031 123 4567

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	~-380

1. The **Cases for [selected customer]** page will open.
2. A list of cases pertaining to that customer will display.
3. Any **closed** Cases in this list will be greyed out.

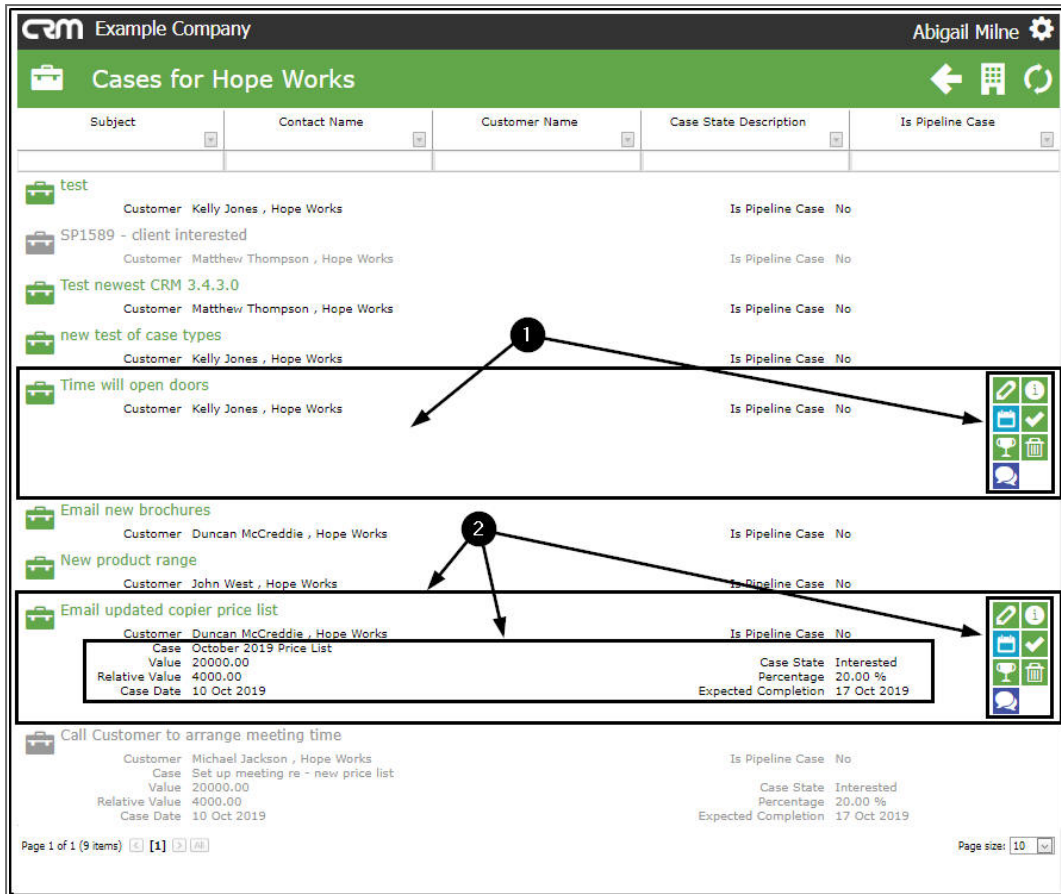


VIEW CASE ACTION BUTTONS

1. Hover over any open Case to reveal the **Action** buttons:
 - View / Edit this Case
 - View Case info and history
 - New Activity
 - Close this case
 - Won this Case
 - Lost this Case
 - New Quote

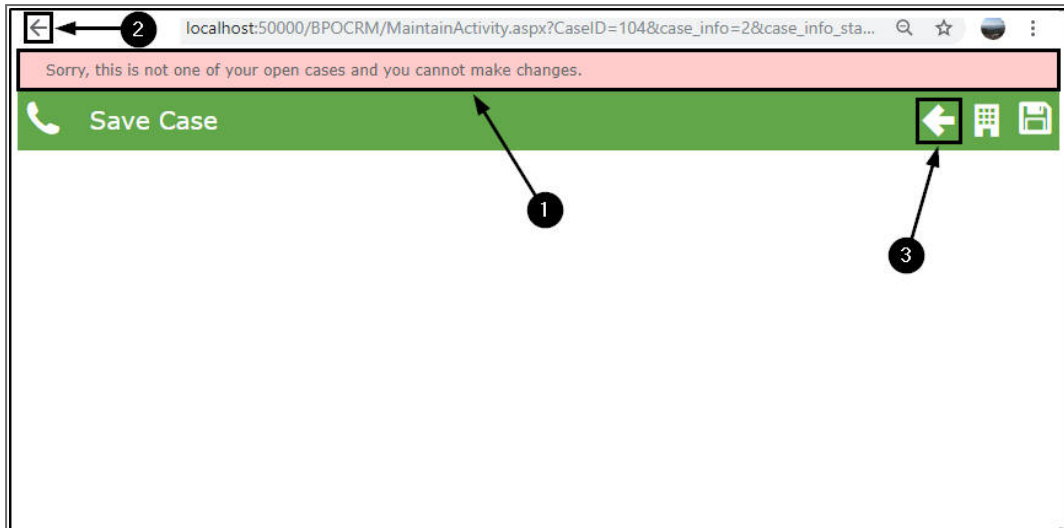
VIEW CASE SUMMARY

2. **Single click** on any Case to access a **Summary** of the Case information and if it is an open case, this will also cause the the **Action buttons** to be displayed. \ (Closed cases will only display the Summary.)



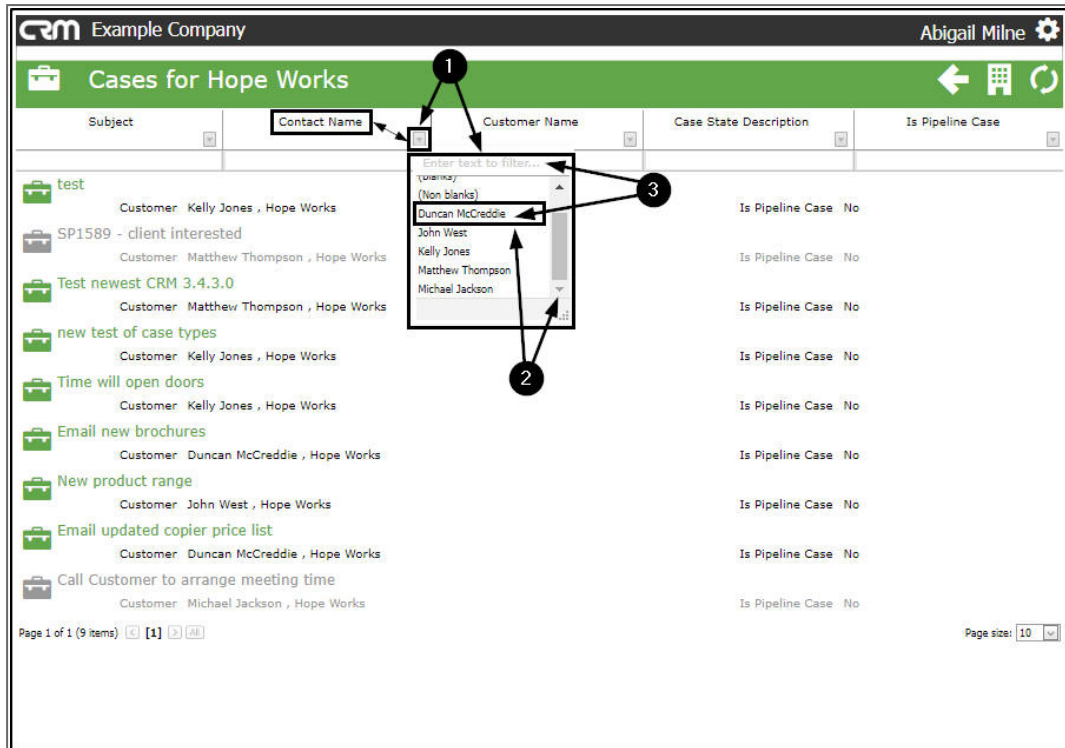
ON CASES WHERE YOU ARE NOT THE SALESMAN

1. If you try and use the Action buttons for a Customer that is linked to another Salesman, then an error message will appear at the top of the page:
 - ***Sorry, this is not one of your open cases and you cannot make changes.***
2. Click on the **Back** arrow *or*
3. The **Back** button to return to the **Cases for [selected customer]** page.

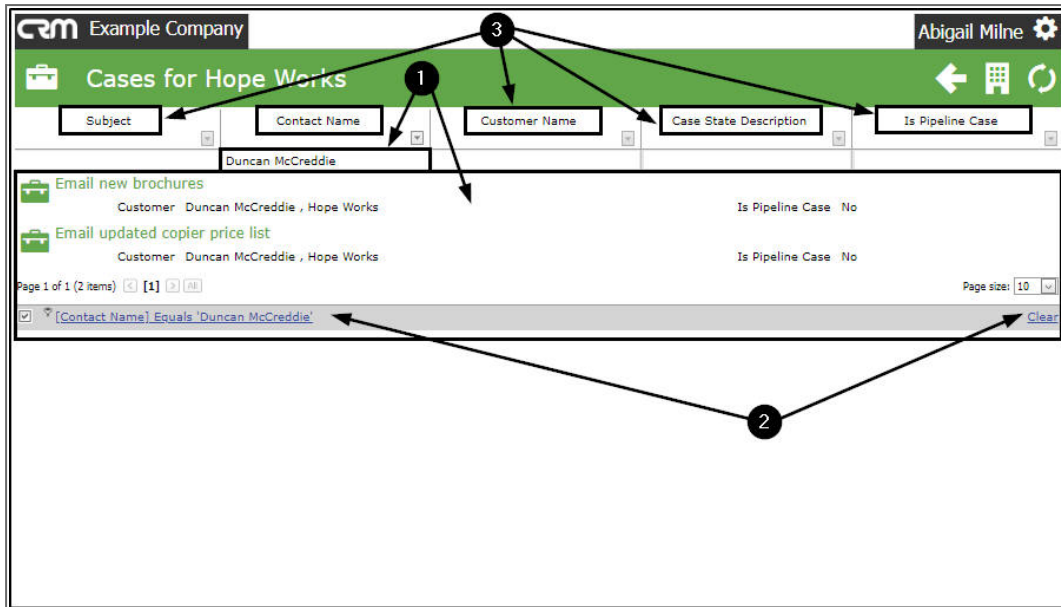


SEARCH FOR CASES USING THE FILTER ROW AND FILTER LIST FUNCTIONALITY

1. You can click on a **filter arrow** to display the applicable drop-down menu.
 - In this example, the selected filter arrow is in the **Contact Name** column, therefore the menu displayed will list all the contact names linked to your cases.
2. Either **scroll** through the list to find the relevant contact name from the menu.
3. Or use the **filter box** to type in the relevant contact name, the system will search for the name as you type. Click on the name.



1. The **Cases for [selected customer]** page will now list only the cases linked to this contact name.
2. The **filter row** will display the filter sequence. You can click on **Clear** to remove any filter(s). The page will then display all the Cases linked to the customer list again.
3. You can search for specific cases in this way using any of the columns:
 - **Subject**
 - **Customer Name**
 - **Case State Description**
 - **Is Pipeline Case**
 and a combination of columns if required e.g. **Customer Name and Case Description**.

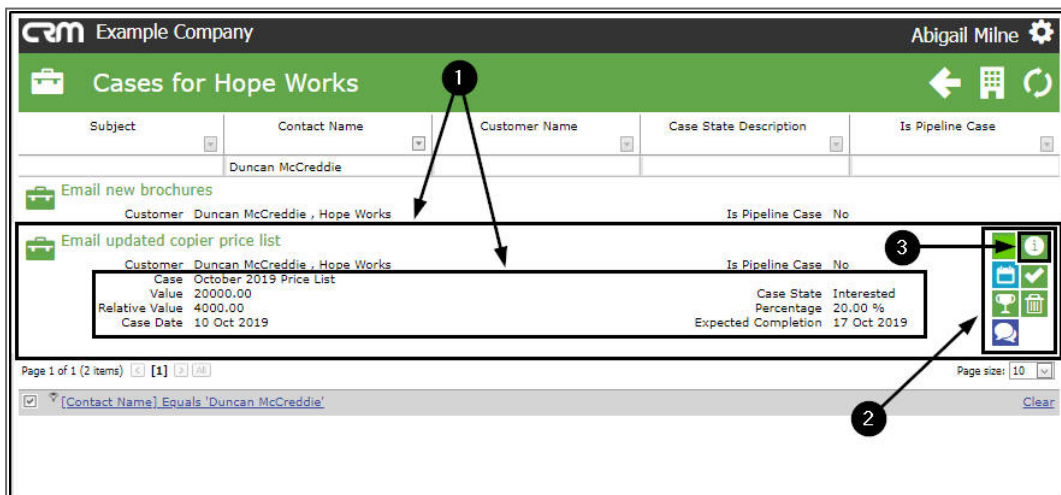


1. **Single click** on an open Case in this page to display the **summary** of the Case information and to reveal the
2. **Action Item** buttons:

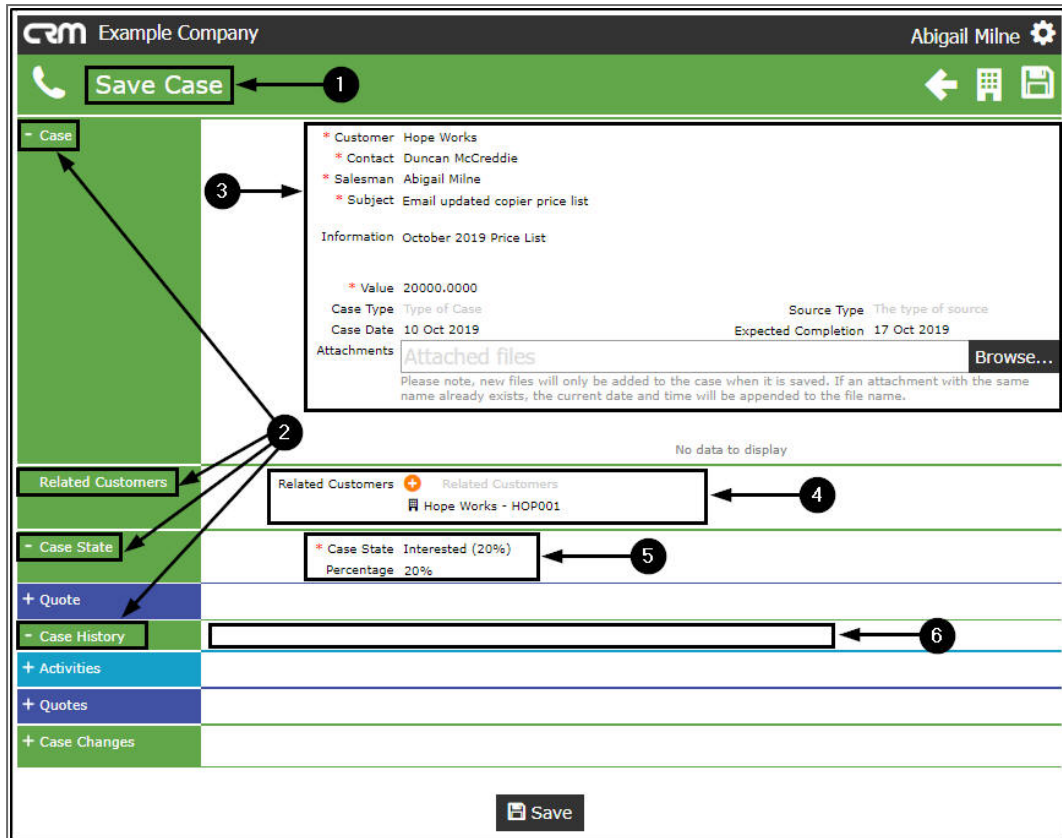
CASES – ACTION BUTTONS

VIEW CASE INFORMATION AND HISTORY

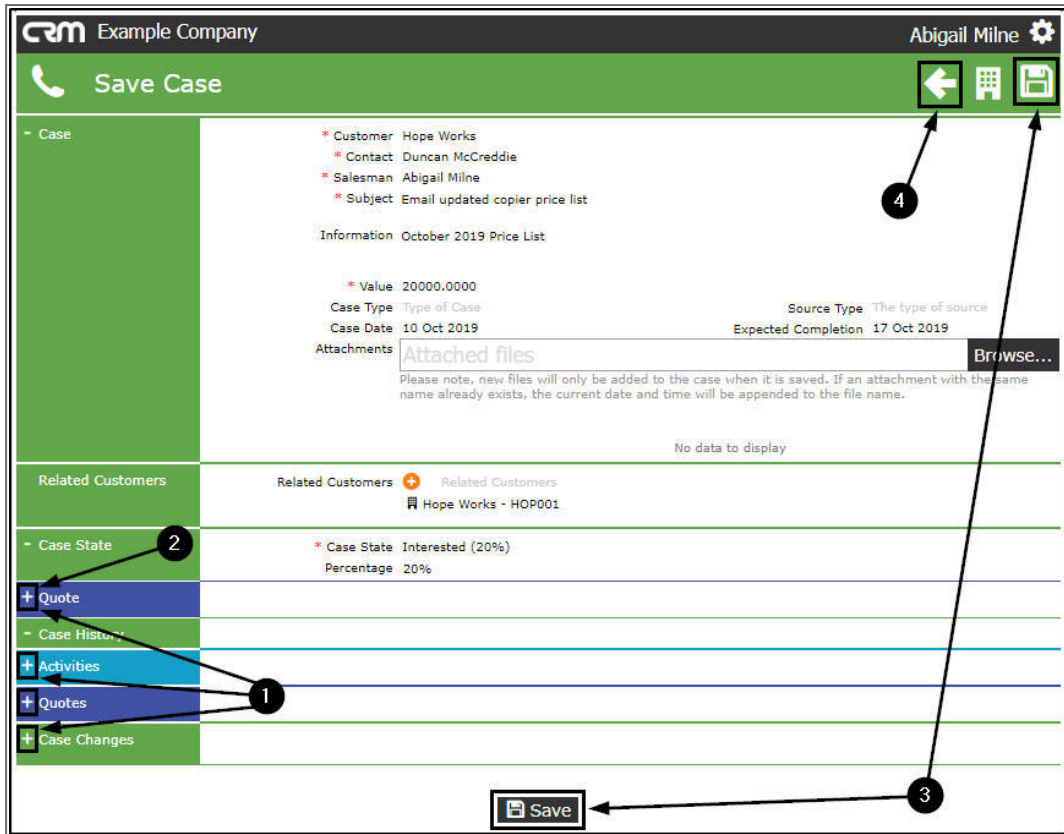
3. Click on the **View Case Info and History** icon.



1. The **Save Case** page will be displayed.
2. The following frames will be auto-expanded:
3. **Case**
 - You will note that the **case details** are auto populated. You can edit all these details, except for the Customer, Salesman, Subject and Information fields.
4. **Related Customers**
 - You will note that the Customer Name will be auto populated, you can **add more Related Customers**, if required.
5. **Case State**
 - The Case State and Percentage will be auto populated. You can **edit the Case State**, if required (which will update the Percentage).
6. **Case History**
 - Here you can view previous activities, quotes and changes on this case, if applicable.

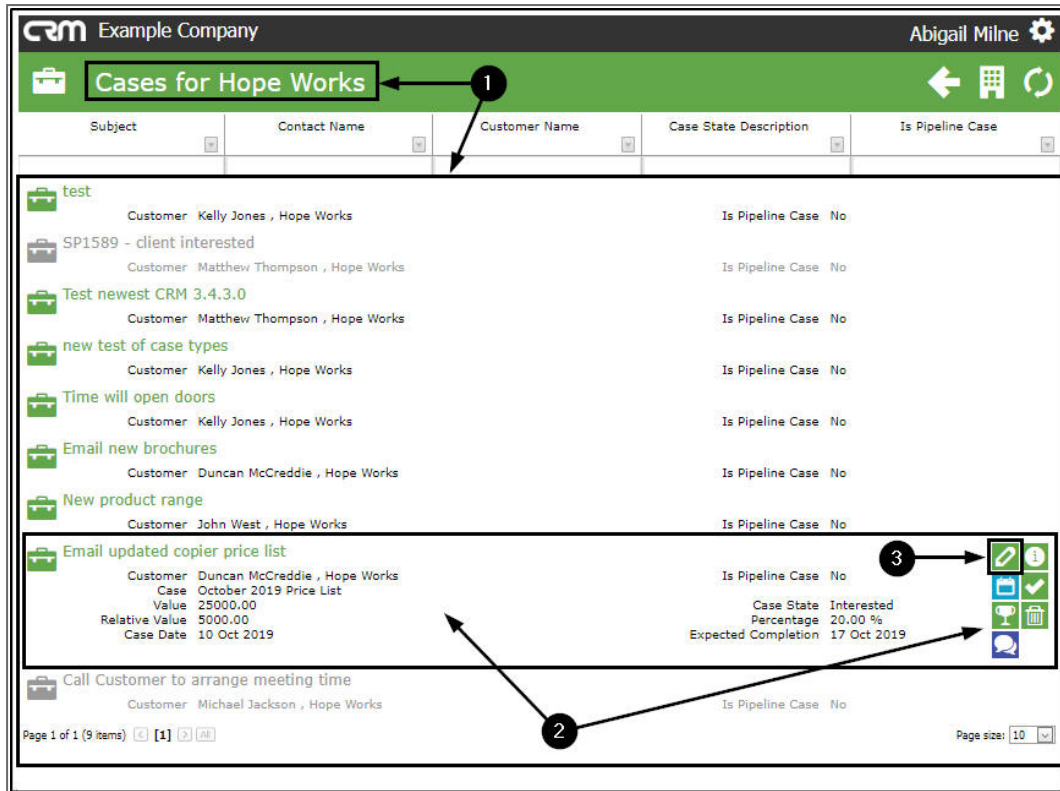


1. Click on the **expand** icon in any of the collapsed frames to **view** and/or **add** or **edit** the content, if required.
2. In this page, you can link a **Quote** to this Case. Refer to [Add a new Quote linked to this Case](#) for more information.
3. Click on **Save** to apply any changes.
4. Click on the **Back** button to return to the **My Cases** page.



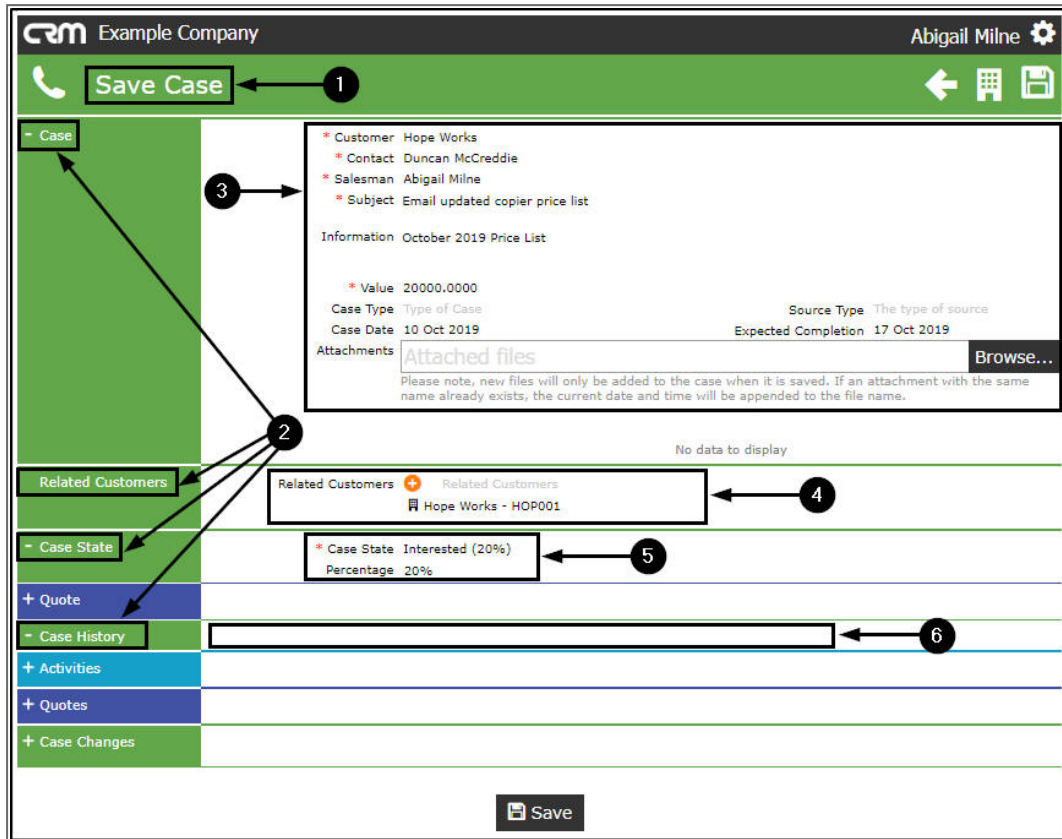
VIEW / EDIT THIS CASE

1. After clicking on **Save** or **Back**, you will return to the **Cases for [selected customer]** page but the page will no longer be filtered, all the Cases linked to the selected customer will again be displayed.
2. Hover anywhere over an open Case to display the **Action Items** buttons.
3. Click on the **View/Edit this Case** icon.

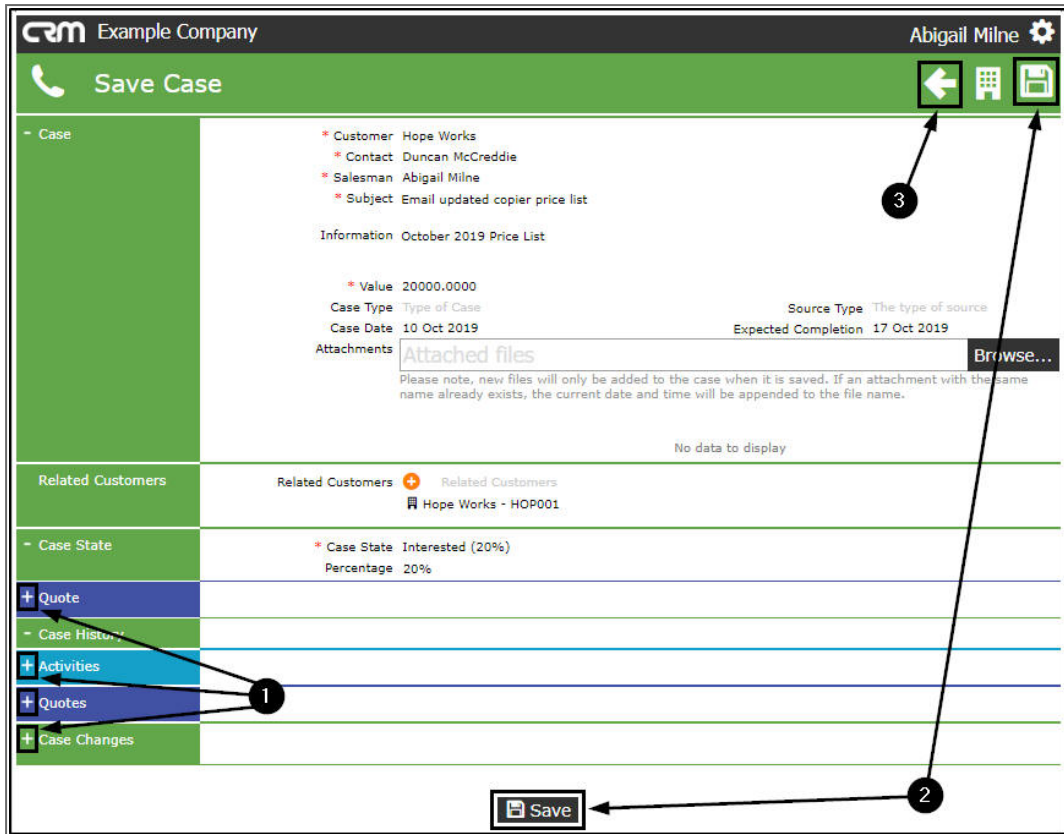


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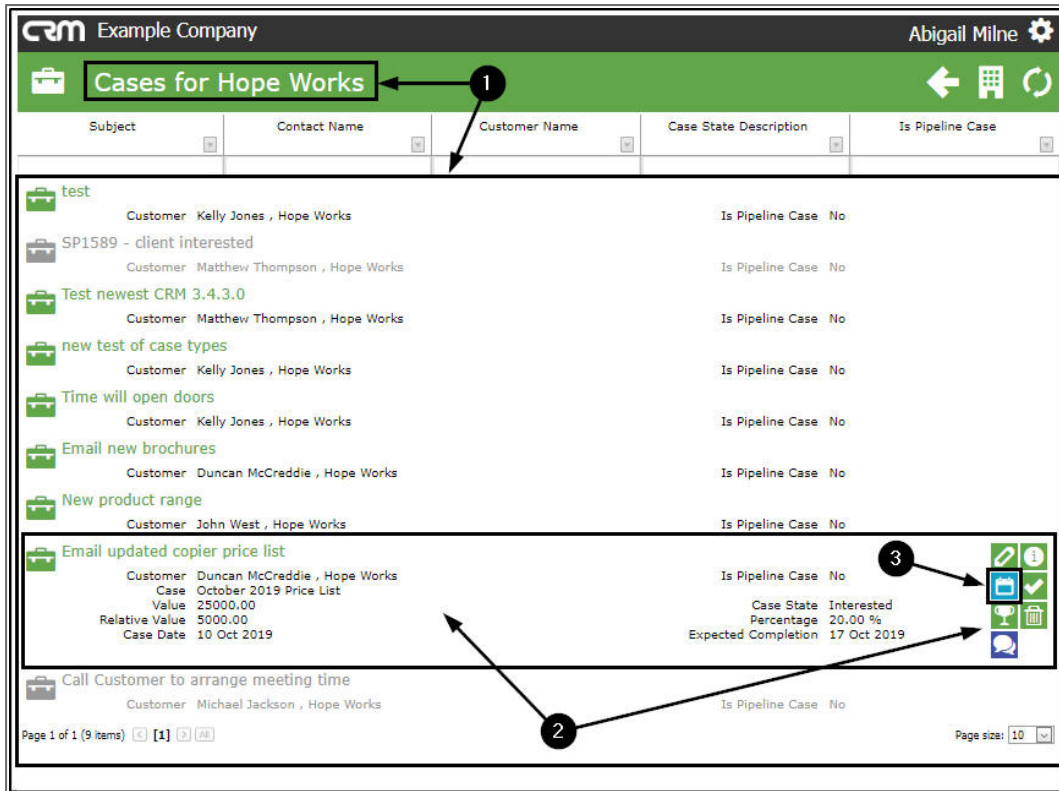


1. Click on the **expand** icon in any of the collapsed frames to **view** and/or **edit** the content, if required.
2. Click on **Save** to apply any changes or
3. Click on the **Back** button to return to the previous page.



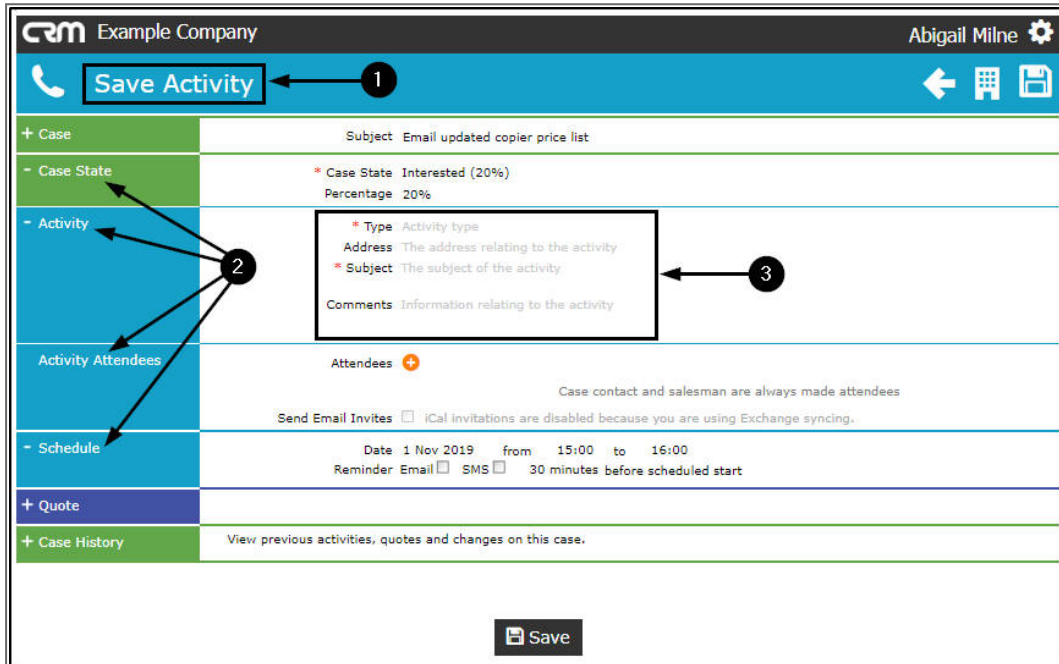
NEW ACTIVITY

1. In the **Cases for [selected customer]** page,
2. Hover anywhere over an open Case to display the **Action Items** buttons.
3. Click on the **New Activity** icon.



1. The **Save Activity** page will be displayed.
2. The following frames will be auto-expanded:
 - **Case State**
 - **Activity**
 - **Activity Attendees** and
 - **Schedule**
3. Update the Activity Information:
 - **Type:**
 - Click in the **Type** field to display an **Activity Type** drop-down list.
 - Select from this list the applicable type (e.g. Phone call).
 - **Address:**
 - Click in the **Address** field, a list of all addresses linked to the customer will be displayed.

- Select the applicable address from this list.
- **Subject:**
 - Type in the **Subject** of this activity (e.g. Email new product product range catalogue).
- **Comments**
 - Type in a **Comment** relating to this activity (e.g. Customer looking to upgrade current machines).



The screenshot shows the 'Save Activity' form in a CRM system. The form is titled 'Save Activity' and is for 'Example Company'. The user 'Abigail Milne' is logged in. The form is divided into several sections: Case, Case State, Activity, Activity Attendees, Schedule, Quote, and Case History. The 'Activity' section is highlighted with a blue background and contains fields for Type, Address, Subject, and Comments. A callout box points to the 'Subject' field with the number 3. The 'Activity Attendees' section has a plus sign and a note that case contact and salesman are always made attendees. The 'Schedule' section has fields for Date, Time, and Reminder. A 'Save' button is at the bottom.

1. You can select **Attendees** to link to the activity.
 - In this field you can select from **employees** and the **current customer contacts**.
2. You can select to **Send Email Invites** in order to have the system send an email invite for this activity, to all attendees.
3. Schedule the **Date and Time** for the activity.
4. Set a **Reminder** Email or SMS as and if required.

CRM Example Company
Abigail Milne

☎ Save Activity ← 📅 📄

+ Case Subject: Email updated copier price list

- Case State * Case State: Interested (20%)
Percentage: 20%

- Activity * Type: Email
Address: The address relating to the activity
* Subject: Email new product brochure
Comments: Customer looking to upgrade current machines.

Activity Attendees 1 → Attendees + ▼

Case contact and salesman are always made attendees

2 → Send Email Invites iCal invitations are disabled because you are using Exchange syncing.

- Schedule 3 → Date: 1 Nov 2019 from 15:00 to 16:00

Reminder: Email SMS 30 minutes before scheduled start ← 4

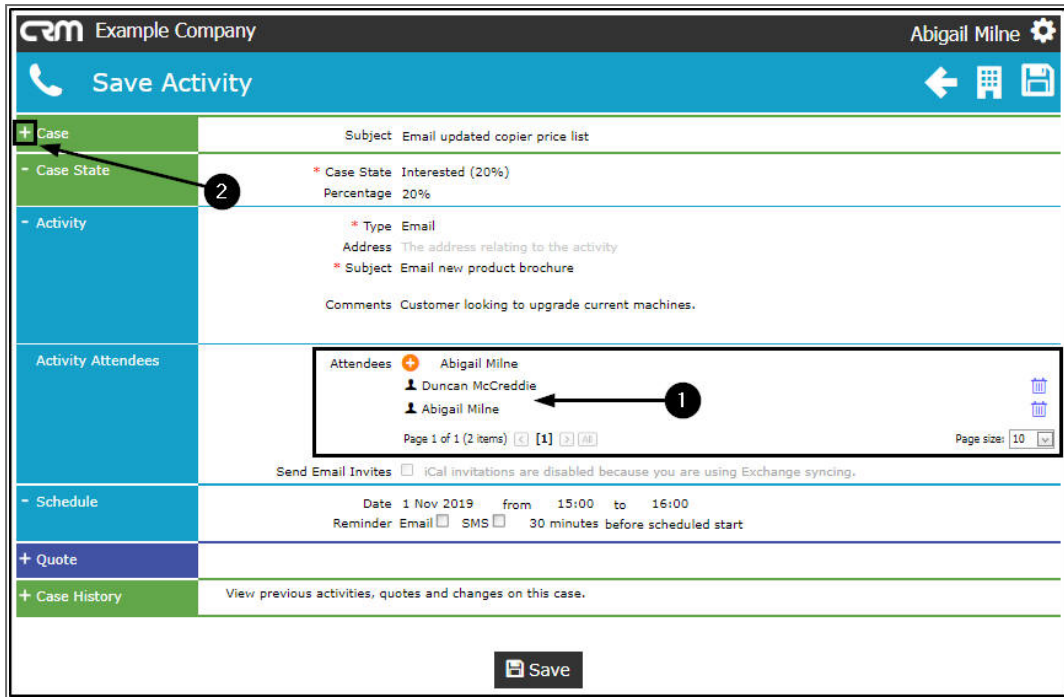
+ Quote

+ Case History View previous activities, quotes and changes on this case.

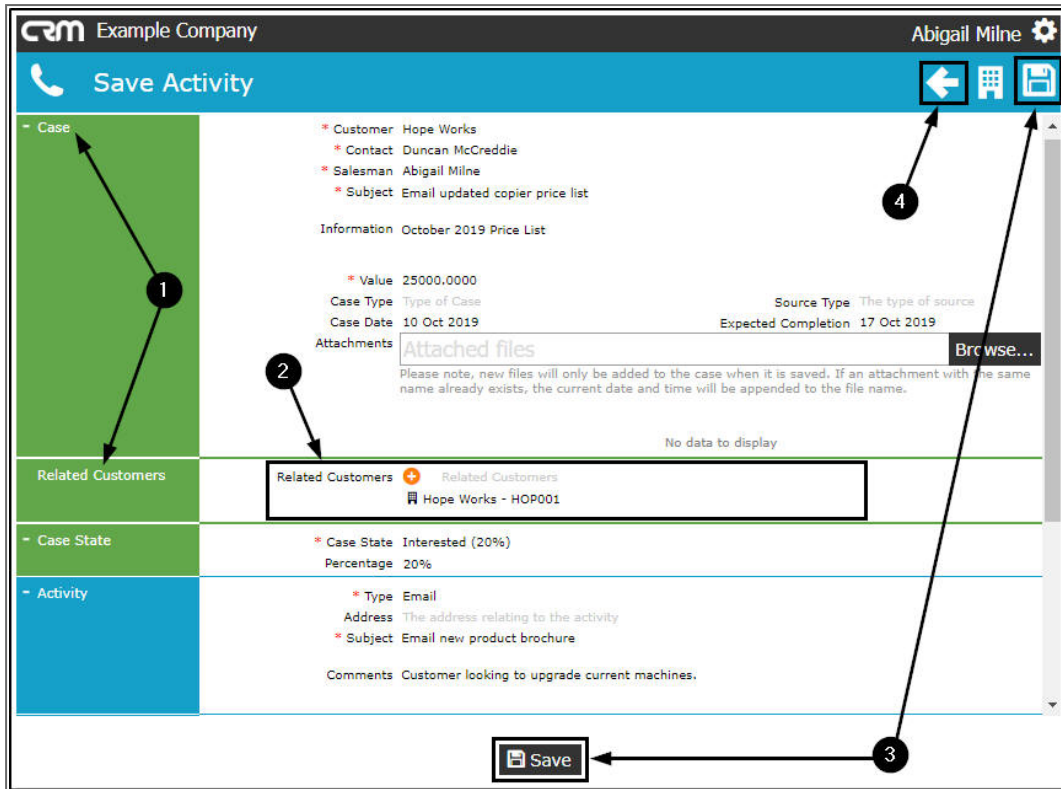
Save

Add Related Customers

1. Once you have added Attendees, you may also wish to link **Related Customers** in order to invite contacts from various clients to an Activity - such as a meeting or training session. (these are not found in the Attendees list).
2. Click on the **expand** button in the **Case** frame.

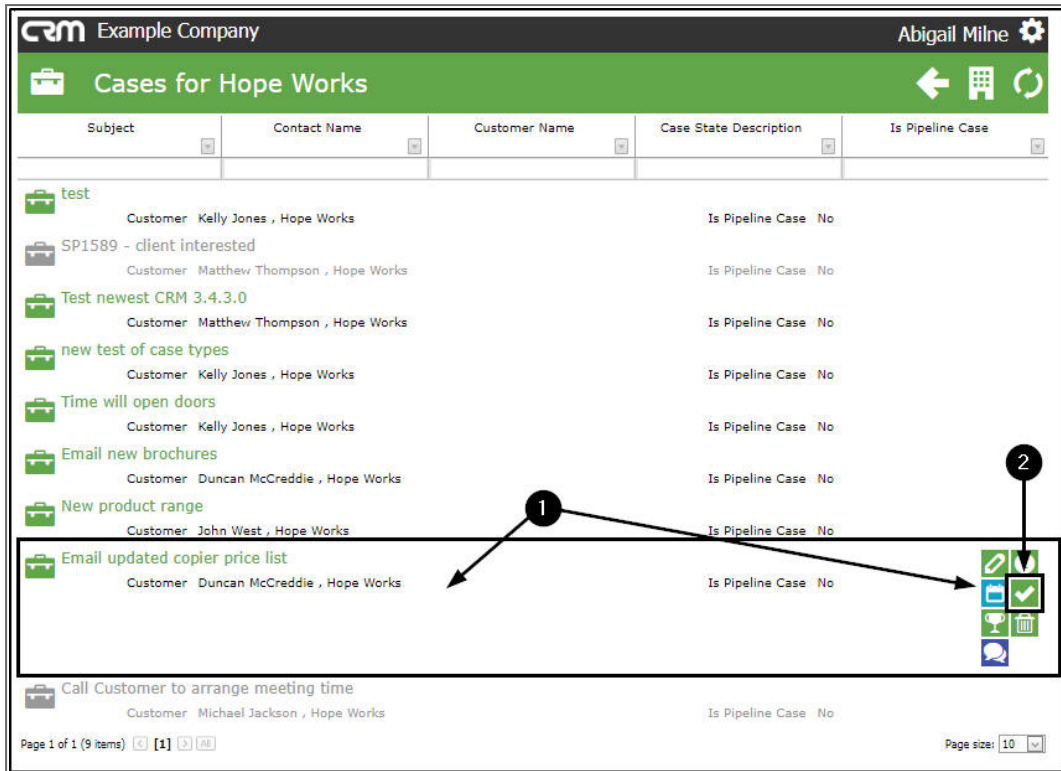


1. The Case frame will be expanded to reveal the **Related Customers** frame.
2. Follow the process to **add the related customer(s)**, if required.
3. When you have finished adding the new activity details for this case, click on **Save** to return to the previous page .
4. If you do not wish to save any changes, click on the **Back** button to return to the previous page.

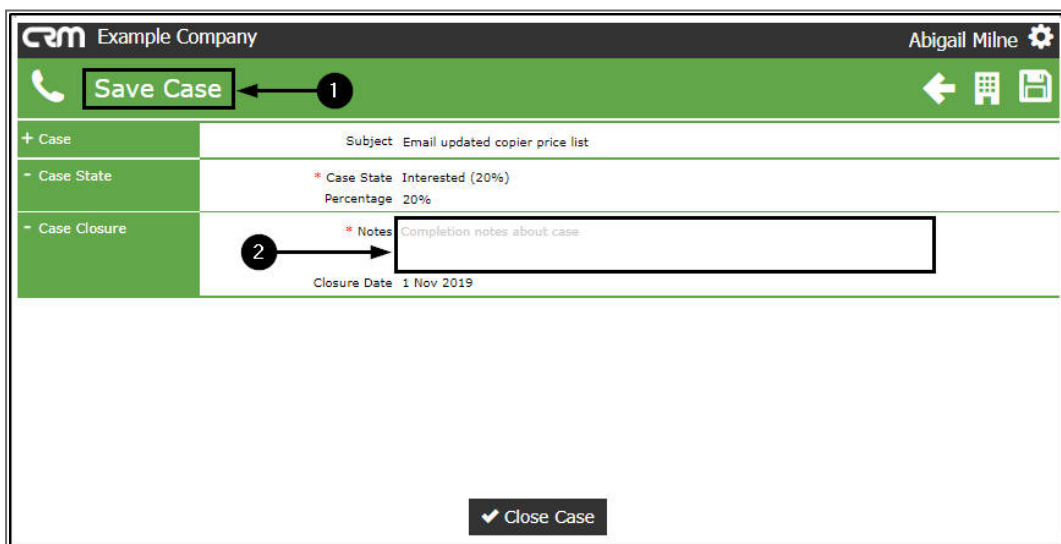


CLOSE THIS CASE

1. In the **Cases for [selected customer]** page, hover anywhere over an open Case to display the **Action Items** buttons.
2. Click on the **Close this Case** icon.



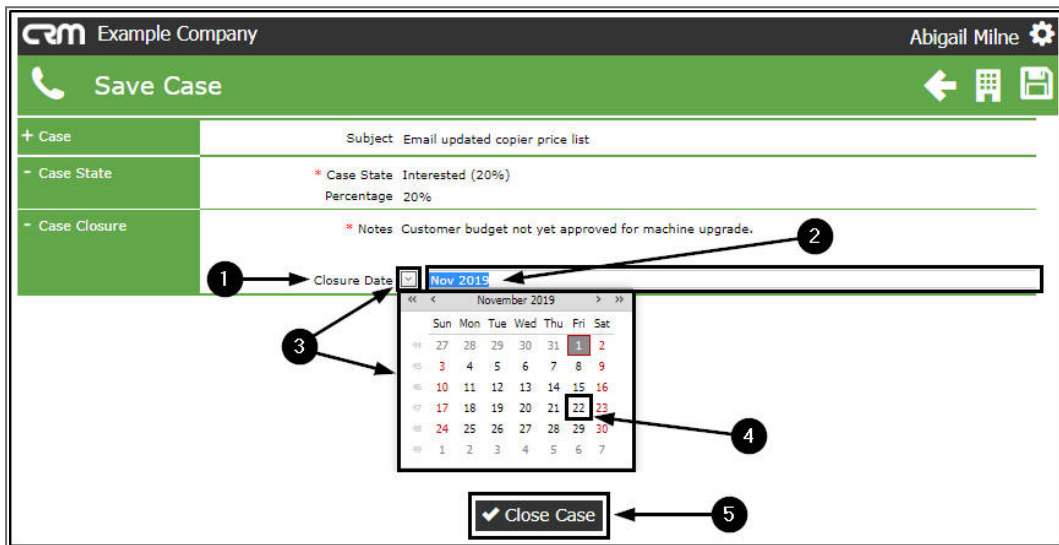
1. The **Save Case** page will be displayed.
2. Type a completion note/explanation in the **Notes** field (e.g. Customer budget not yet approved for machine upgrade).



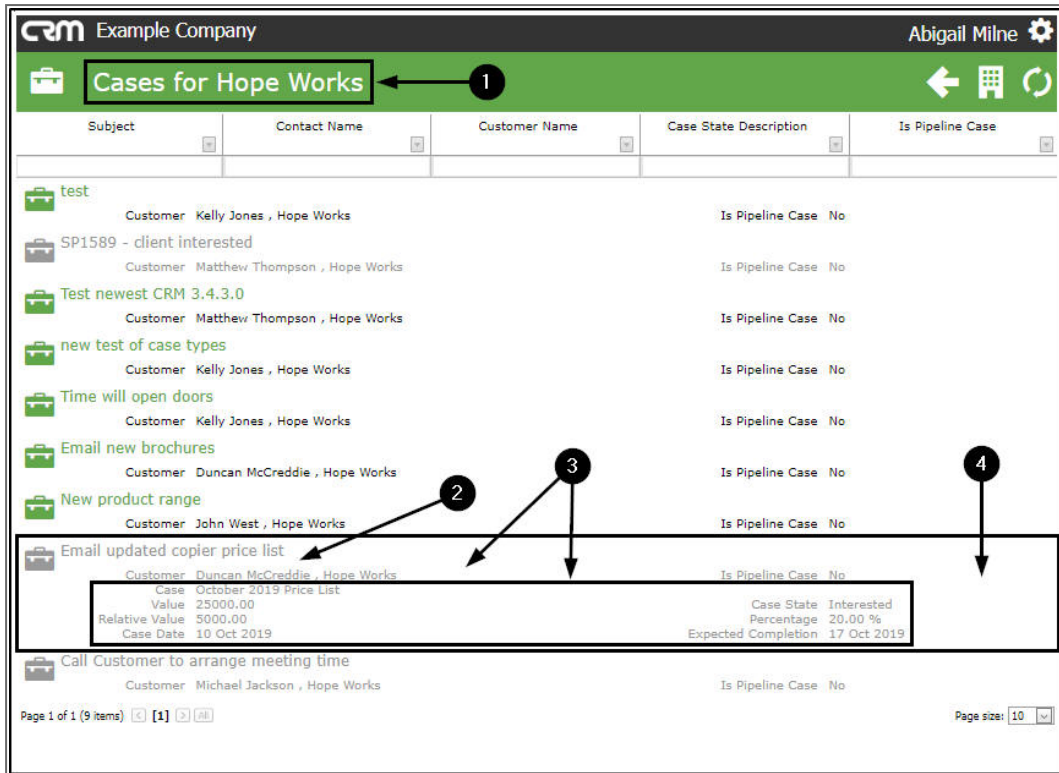
1. The **Closure Date** will auto populate with the current date.

If you wish to change this date,

2. Either, type the correct date directly in this field,
3. Or, click in this field to display a drop-down arrow, click on this arrow to bring up the calendar function.
4. Select the applicable alternative date.
5. Click on **Close Case**.



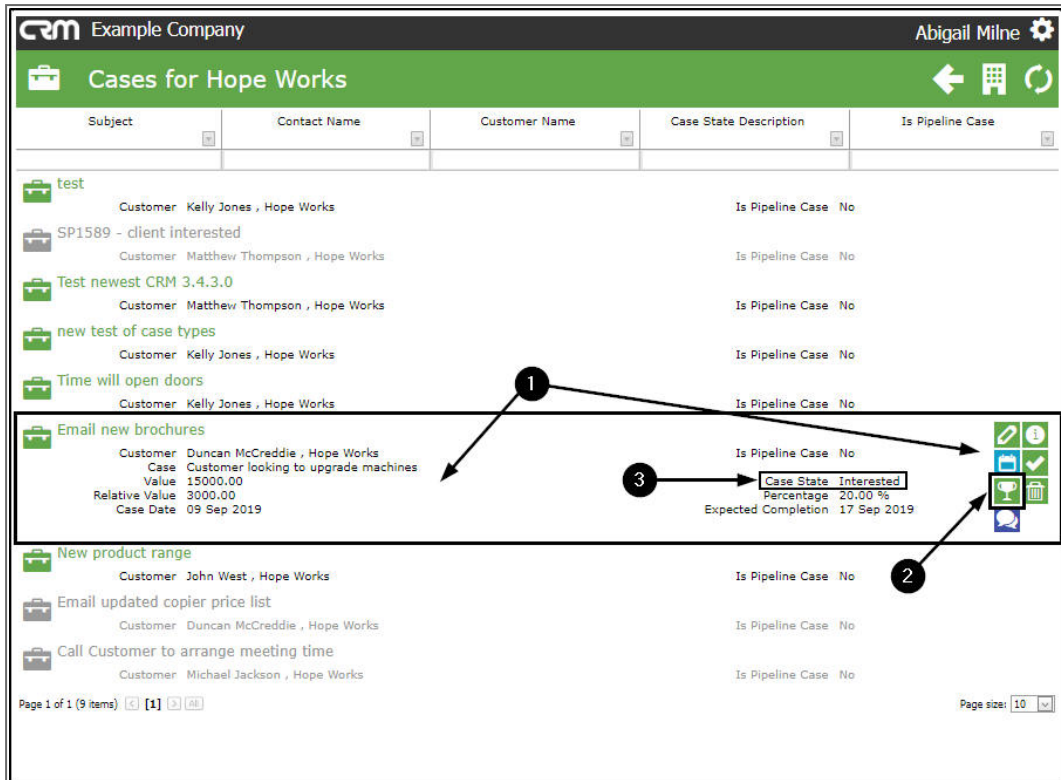
1. You will return to the **Cases for [selected customer]** listing page.
2. The recently closed Case will now be **greyed out** in this list.
3. You can single click on the closed Case to view the Case **Summary**.
4. You will note that the **Action Item buttons** are no longer available for this Case.



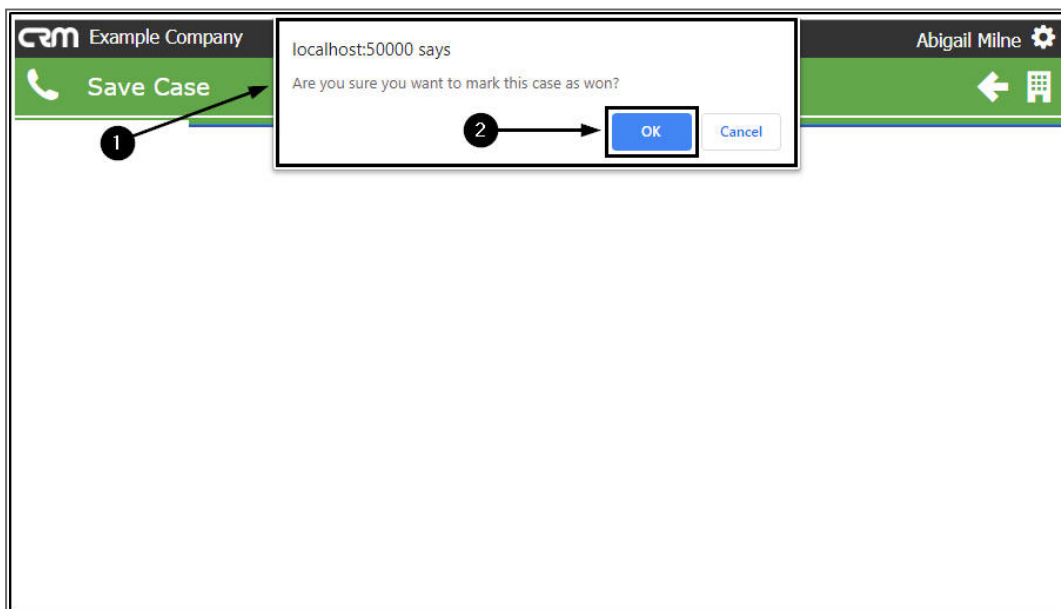
WIN A CASE

1. In the **Cases for [selected customer]** page, hover anywhere over an open Case to display the **Action Items** buttons.
2. Click on the **Won this Case** icon.
3. Note that the **Case State** is currently **Interested**.

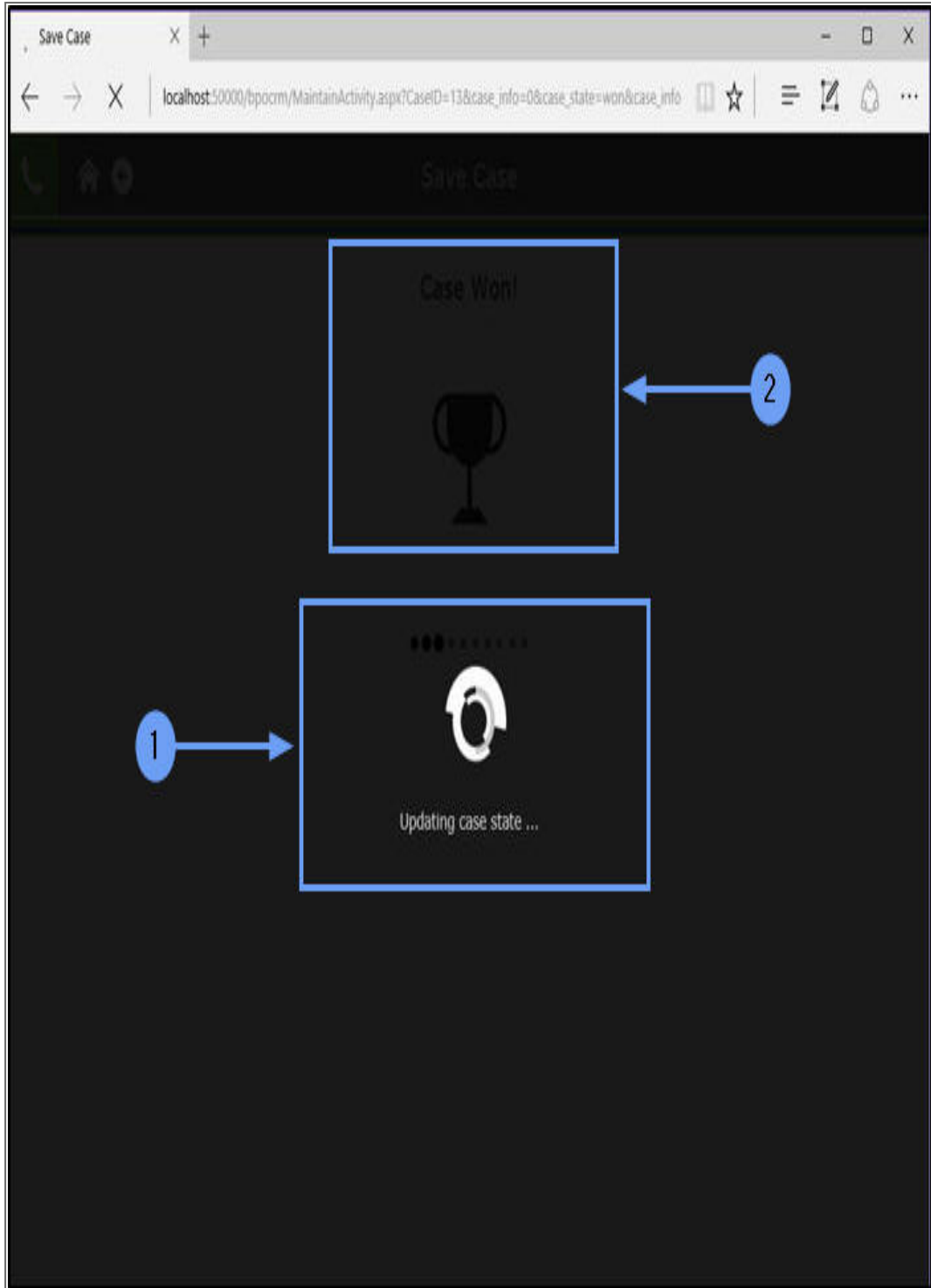
Note: A Case cannot be Won via Case Action Buttons - if this Case Type has Stage Gates Enabled. All Stage Gate Questions will need to be responded to, in order to 'Win the Case'.



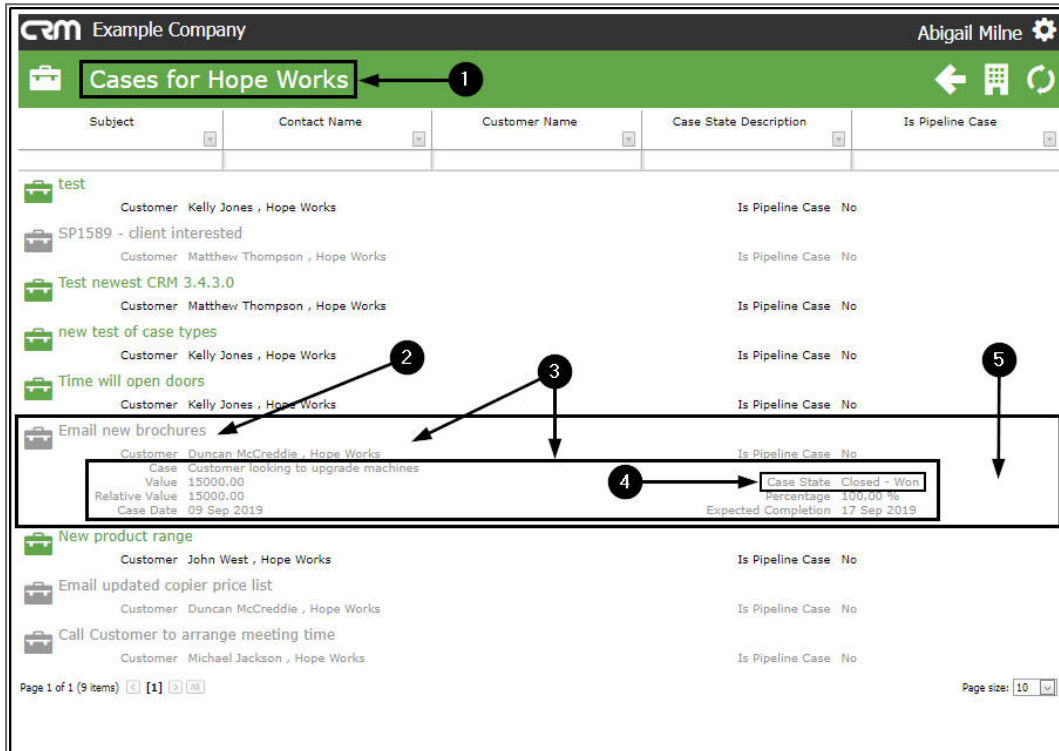
1. A message box will pop up asking:
 - *Are you sure you want to mark this case as won?*
2. Click on **OK**.



1. The system will update the Case State.
2. A **Case Won** message with a **Trophy** image will briefly flash on the screen.

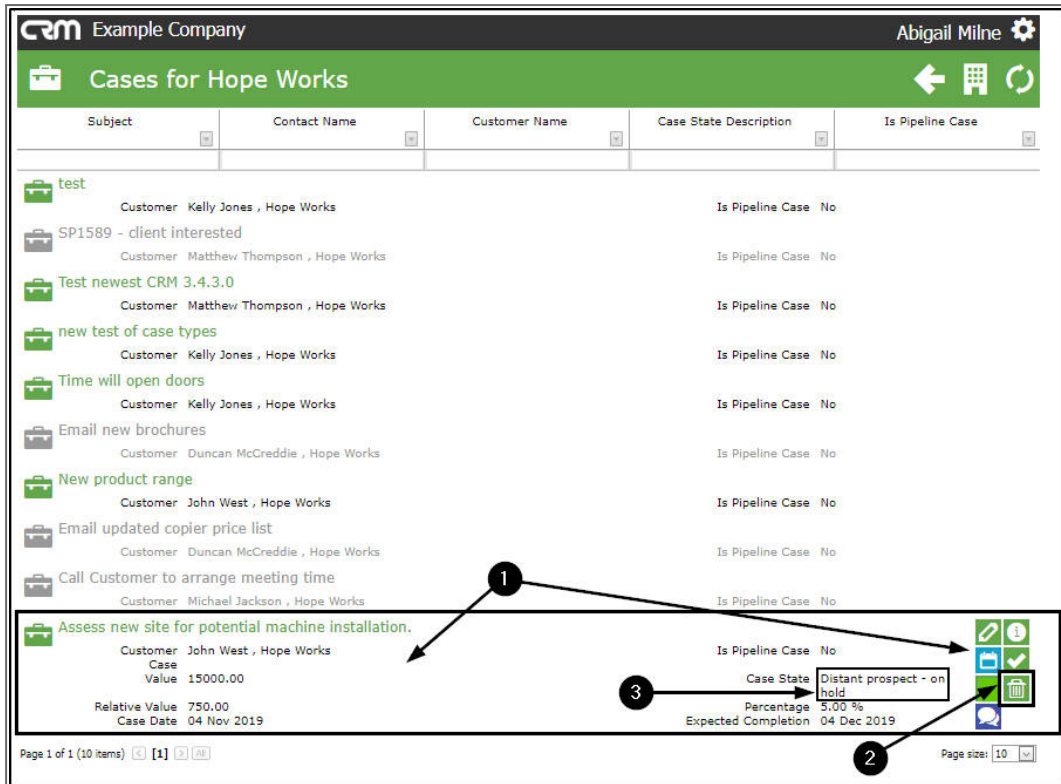


1. You will return to the **Cases for [selected customer]** listing page.
2. The recently won Case will now be **greyed out** in this list.
3. You can single click on the won Case to view the Case **Summary**.
4. The **Case State** has updated to **Closed - Won**.
5. You will note that the **Action Item buttons** are no longer available for this Case.

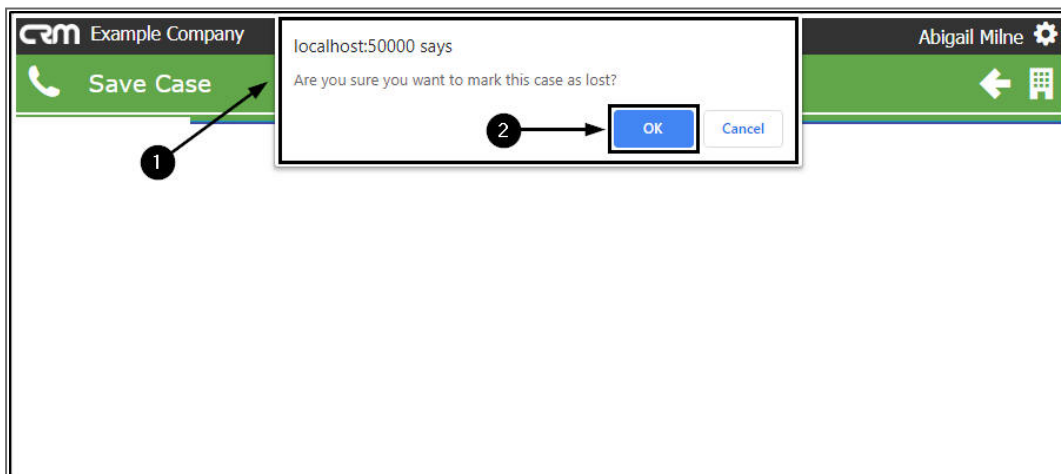


LOST THIS CASE

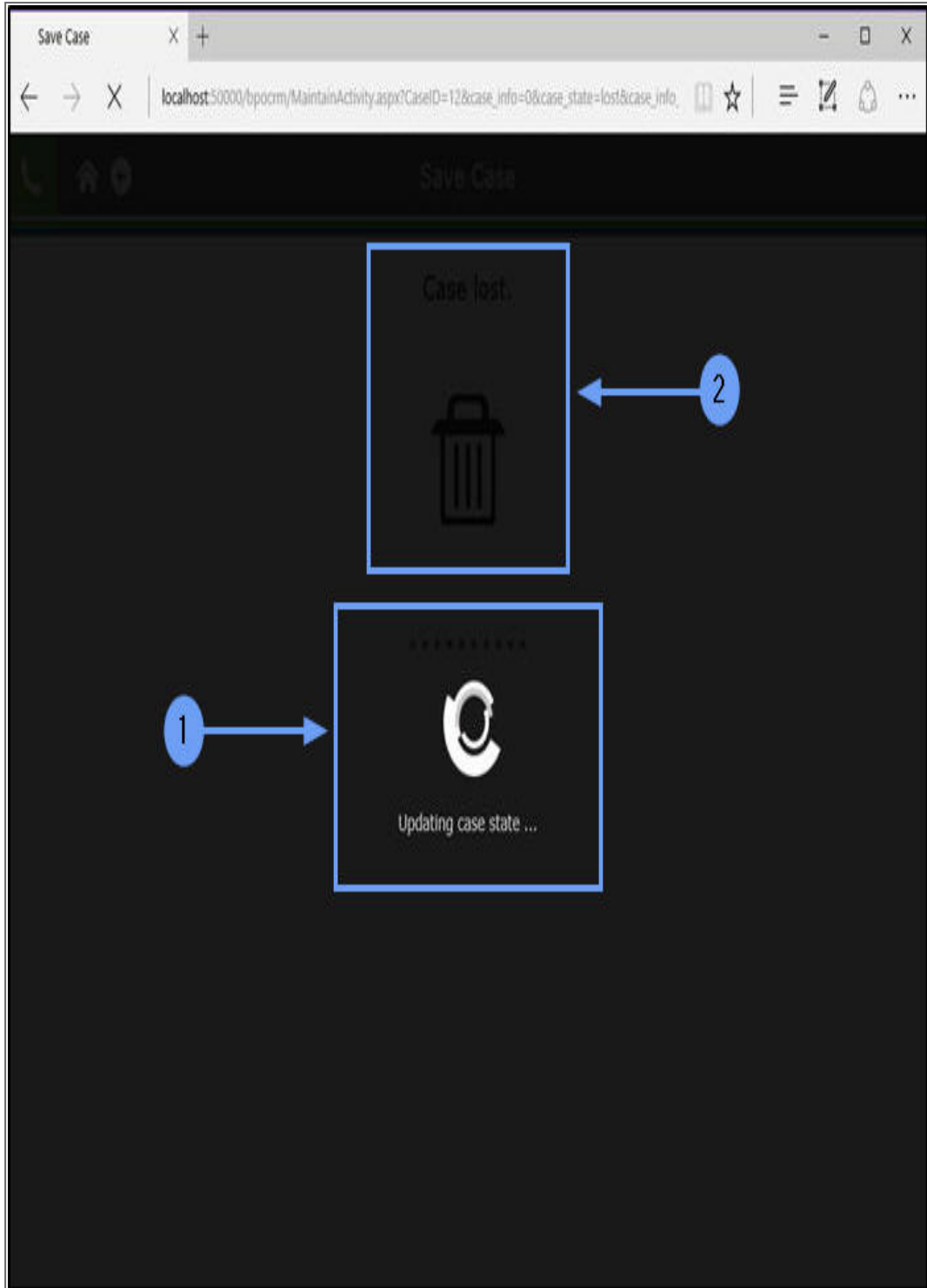
1. In the **Cases for [selected customer]** page, hover anywhere over an open Case to display the **Action Items** buttons.
2. Click on the **Lost this Case** icon.
3. Note that the current **Case State** is **Distant Prospect - on hold**.



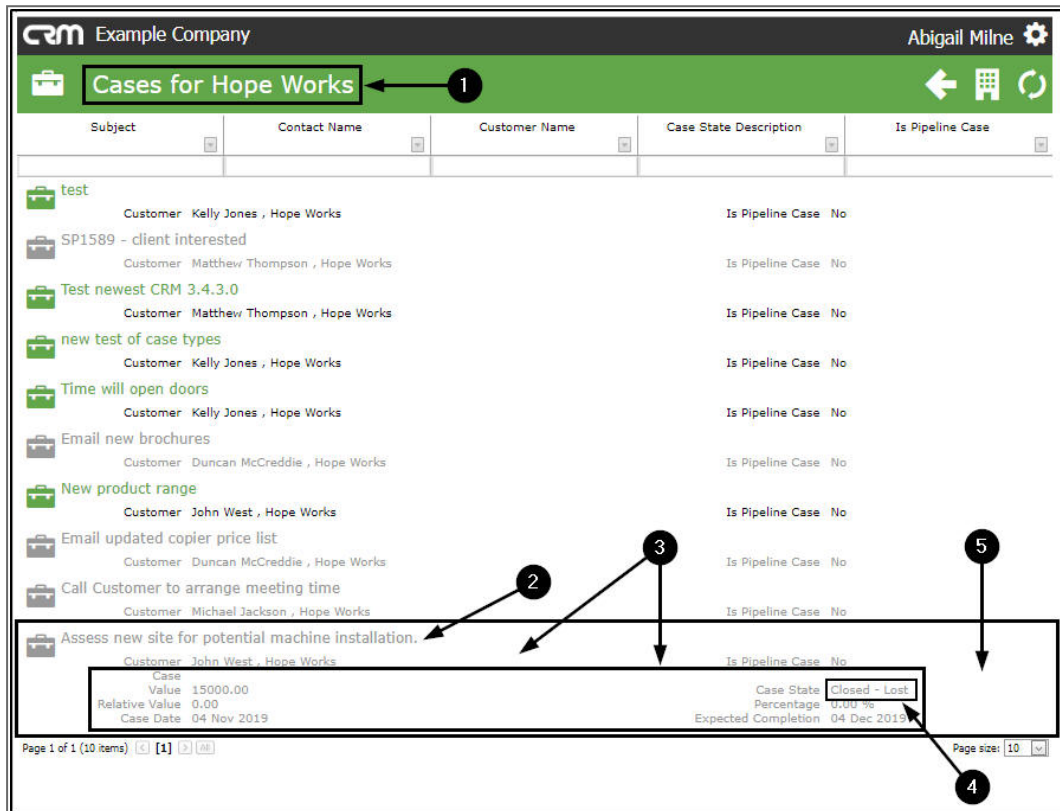
1. A message box will pop up asking:
 - *Are you sure you want to mark this case as lost?*
2. Click on **OK**.



1. The system will update the Case State.
2. A **Case Lost** message with a **Trash Bin** image will briefly flash on the screen.



1. You will return to the **Cases for [selected customer]** listing page.
2. The recently lost Case will now be **greyed out** in this list.
3. You can single click on the lost Case to view the Case **Summary**.
4. The **Case State** has updated to **Closed - Lost**.
5. You will note that the **Action Item buttons** are no longer available for this Case.



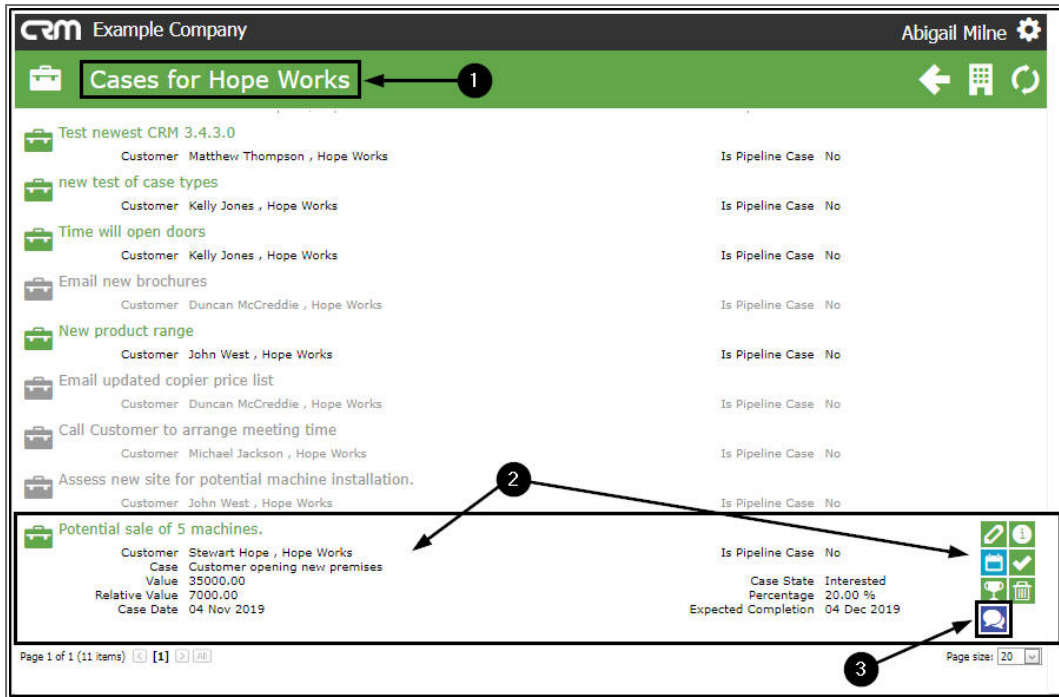
ADD A NEW QUOTE LINKED TO A CASE

- From the **Cases for [selected customer]** page page, you can link a Quote by navigating via the following **Action** buttons:
 - **View Case Info and History**
 - The **Save Case** page will open, expand the **Quote** frame.

- **View/Edit this Case**
 - The **Save Case** page will open, expand the **Quote** frame.
- **New Activity**
 - The **Save Activity** page will open, expand the **Quote** frame.
- **New Quote**
 - The **Save Quote** page will open, the Quote, Quote Financials and Quote Items frames will be expanded, ready for you to add the new Quote details.

For the purpose of this manual we will navigate from the **Save Quote** page page but the **link quote process** is the same from *either* page.

1. In the **Cases for [selected customer]** listing page.
2. Hover anywhere over an open Case to display the **Action Items** tiles.
3. Click on the **New Quote** tile.

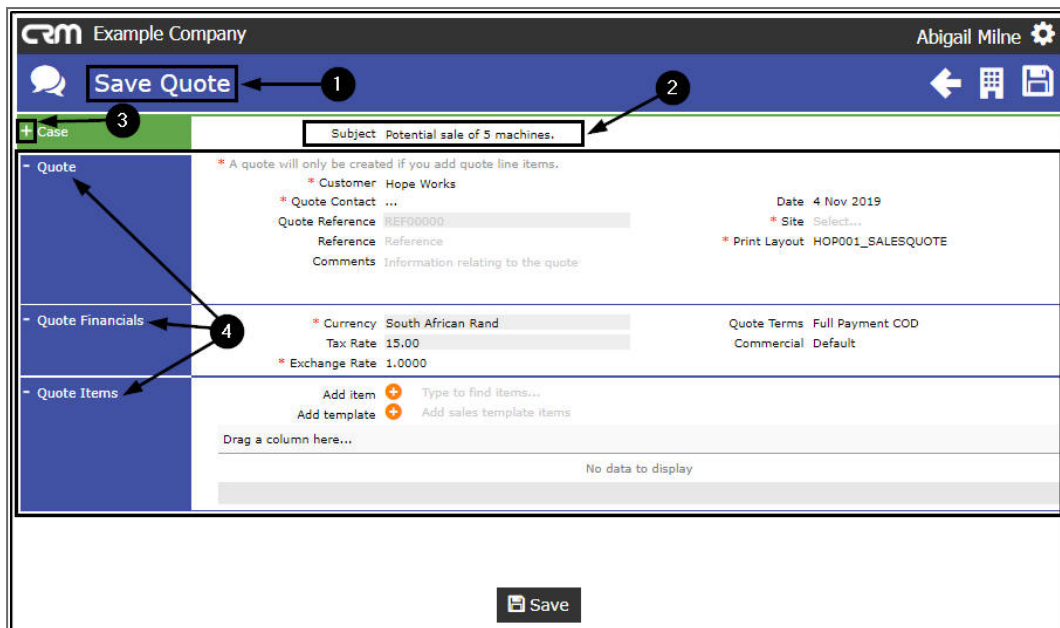


1. The **Save Quote** page will open.

LINK QUOTE PROCESS

2. The **Subject** in the Case frame will be auto populated with the information of the Case selected in the previous step.
3. **Expand** the Case frame if you wish to view the full Case information in this page.
4. The following frames will be auto-expanded :
 - **Quote**
 - **Quote Financials** and
 - **Quote Items**

Note: If you are linking a Quote from the **Save Case** or **Save Activity** pages then you will need to expand these frames manually.



1. Note the message at the top of the Quote frame: ***A quote will only be created if you add quote line items.*** This will be covered in the **Add Quote Items** section of this manual.
2. **Customer:** This will populate with the name of the Customer linked to the Case.
Quote Contact: This will populate with the contact selected in the Case section.
 - You can click on the drop-down arrow and select an alternative contact from the drop-down list, if required.
3. **Quote Reference:** The system will allocate a reference number as the quote is saved.
Reference: Type in a reference for this quote.
Comments: Type in a comment/additional information relating to this quote.

1. **Date:** This will populate with the current date.

You can either type directly in this field to change the date, or click on the drop-down arrow and use the calendar function to select an alternative date if required.

Site: This will auto-populate with the site set up on this customer.

If the customer is linked to more than one site then click on the drop-down arrow and select the correct site for this quote.

Print Layout: This will auto populate with the Sales Quote print layout set up on the Customer.

QUOTE FINANCIALS

2. **Currency:** This will auto populate with the currency set up on the customer. You can click on the drop-down arrow and select an alternative currency, if required.

Tax Rate: This will auto populate with the tax rate set up on the customer.

Exchange Rate: This will auto populate with the exchange rate set up on the customer.

Quote Terms: This is the quote repayment factor and should be configured in **Static Data: Sales Quote Terms or Repayment Method** This will auto populate with Full Payment COD.

- You can click on the drop-down arrow and select an alternative payment period, if required.

Commercial: This will auto populate with the **commercial** set up on the customer.

- Click in this field to reveal a drop-down arrow and select from the list an alternative commercial, if required.

The screenshot shows the 'Save Quote' interface in a CRM system. The header includes 'CRM Example Company' and the user 'Abigail Milne'. The main content is divided into sections:

- + Case:** Subject: Potential sale of 5 machines.
- Quote:**
 - * A quote will only be created if you add quote line items.
 - * Customer: Hope Works
 - * Quote Contact: Stewart Hope
 - Quote Reference: REF00000
 - Reference: HWQ202
 - Comments: Customer requires on-site evaluation.
 - Date: 4 Nov 2019
 - * Site: [Select...]
 - * Print Layout: HOP001_SALESQUOTE
- Quote Financials:**
 - * Currency: South African Rand
 - Tax Rate: 15.00
 - * Exchange Rate: 1.0000
 - Quote Terms: Full Payment COD
 - Commercial: Default
- Quote Items:**
 - Add item (+) Type to find items...
 - Add template (+) Add sales template items
 - Drag a column here...
 - No data to display

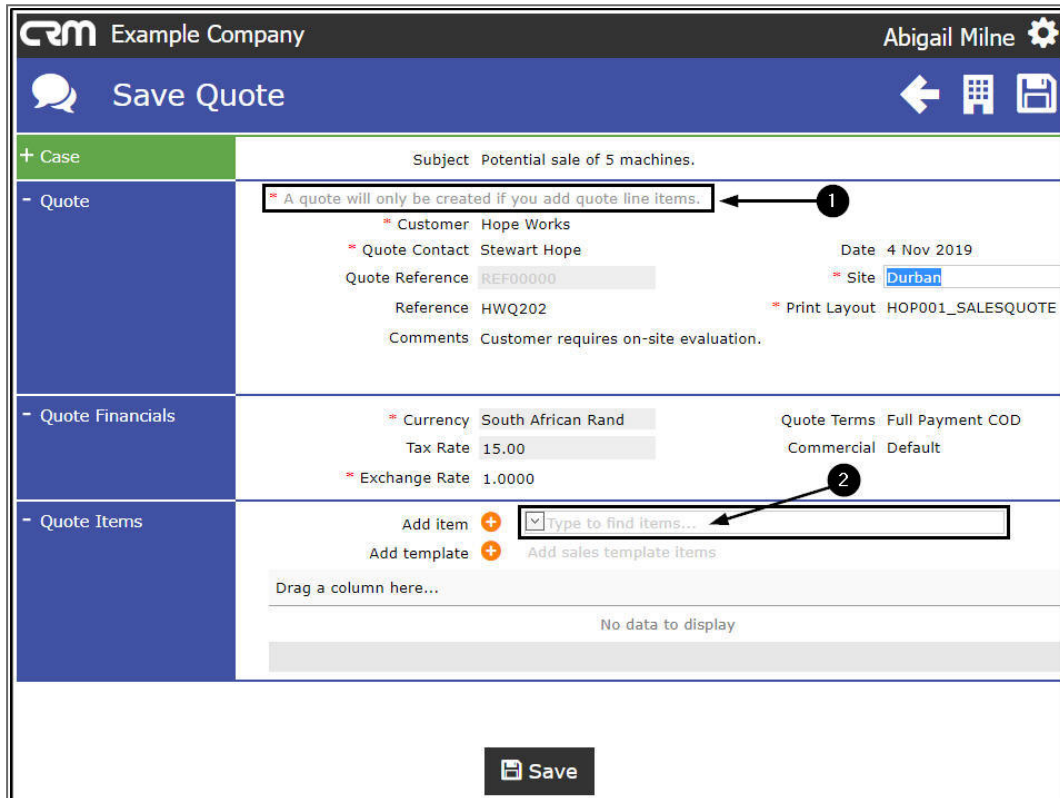
At the bottom, there is a 'Save' button.

ADD QUOTE ITEMS

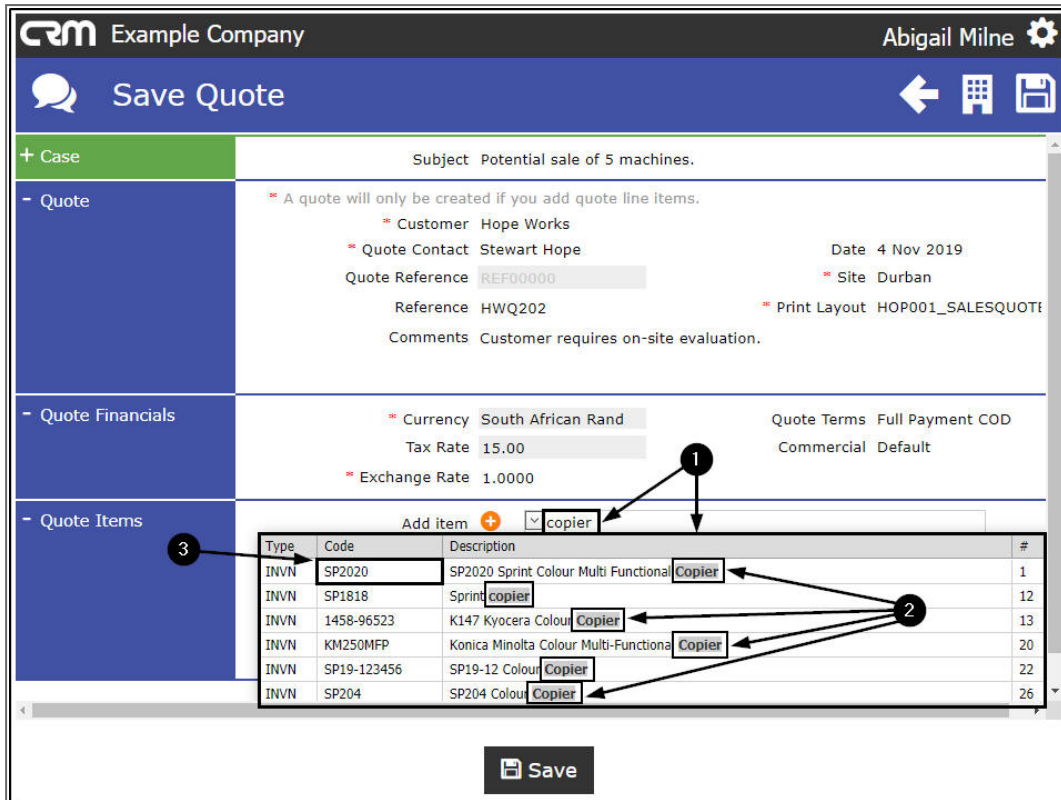
You now have the ability to add single items to a quote.

Note: For Part Numbers to pull through to this list - you need to ensure that the **Quote Products are specified**.

1. Take note of the message at the top of the Quote section: you must add at least one item to this quote for it to be created. This process is set out below.
2. In the **Add item** field, start typing the **code** or **description** of the item you wish to link to this quote.



1. As you start typing in the field, a **Type, Code** and **Description** list of all items on the system, will be displayed.
2. The system will **filter** for the item that you are searching for.
3. Select the applicable **item** from this list.



1. The selected item code and description will populate the **Add** item field.
2. Click on the **plus[+]** button.

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main title is 'Save Quote'. The interface is divided into three main sections:

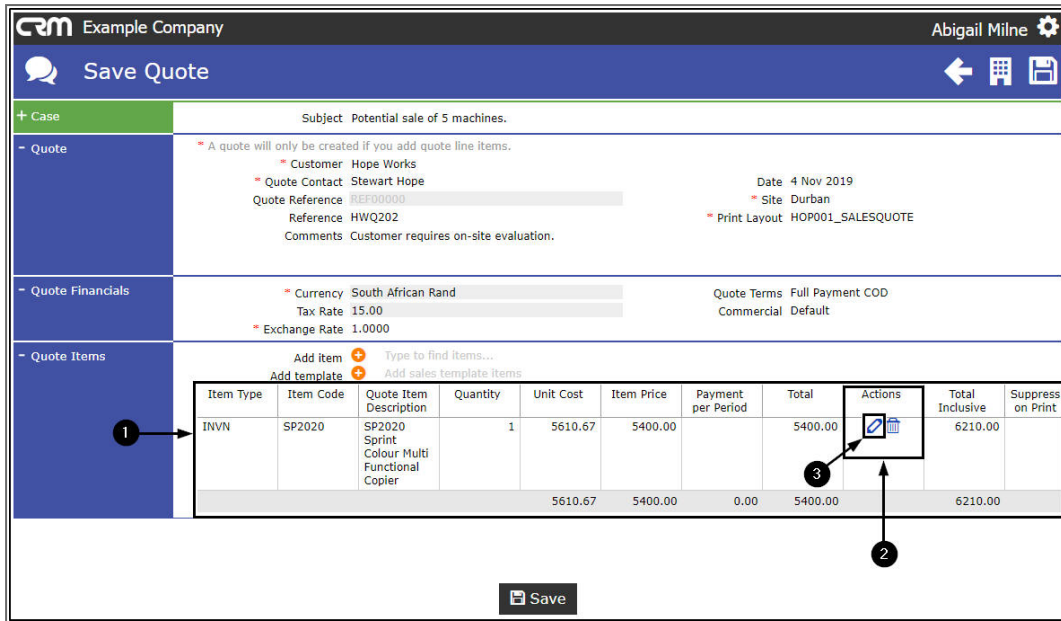
- Quote:** Contains fields for Customer (Hope Works), Quote Contact (Stewart Hope), Date (4 Nov 2019), Quote Reference (REF00000), Site (Durban), Reference (HWQ202), and Print Layout (HOP001_SALESQUOTE). A note states: 'A quote will only be created if you add quote line items.' A comment reads: 'Customer requires on-site evaluation.'
- Quote Financials:** Contains Currency (South African Rand), Tax Rate (15.00), Exchange Rate (1.0000), Quote Terms (Full Payment COD), and Commercial (Default).
- Quote Items:** Features an 'Add item' button (marked with a circled '2') and an 'Add template' button. A dropdown menu is open, showing a selected item: 'INVN | SP2020 | SP2020 Sprint Colour Multi Functional Copi'. Below the dropdown is a table header 'Drag a column here...' and the text 'No data to display'. An arrow (marked with a circled '1') points to the dropdown menu.

A 'Save' button is located at the bottom center of the interface.

1. The item will be added to the **Quote Items** frame.
2. You will note that there are **2** action buttons linked to this item.
 - An **Edit** button. This will enable you to edit the item details e.g. quantity, price, if required.
 - A **Delete** button. This will enable you to delete the item from the quote, if required.

EDIT QUOTE ITEM

3. Click on the **Edit** button.



1. An **edit item** frame will be displayed.

Here you can make changes to the following details:

2. **Item Description**
3. **Item Quantity**
4. **Item Unit Cost**
5. **Item Price**
6. **Suppress on Print** Select this check box if you do not want this line item visible on the printed quote. This will not affect the Sub/Grand Total
7. Click on the **Apply Changes** icon [] to save your changes or the the **Cancel changes** icon [] to cancel the changes, as required.

The screenshot shows the 'Save Quote' interface for 'Example Company'. The quote is for 'Hope Works' on '4 Nov 2019' at 'Durban'. The quote reference is 'REF00000' and 'HWQ202'. The quote includes one item: 'SP2020 Sprint Colour Multi Functional Copier' with a quantity of 1, unit cost of 5610.67, and item price of 5400.00. The total is 5400.00 and total inclusive is 6210.00. Annotations 1-7 point to specific fields and actions in the interface.

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppre on Prio
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	1	5610.67	5400.00		5400.00		6210.00	

1. In this example, the **Quantity** has been updated to **2**.
2. The **Total** and **Total Inclusive** columns will update accordingly.

LINK ADDITIONAL QUOTE ITEMS

3. In the **Add item** field, start typing the **code** or **description** of the next item that you wish to add to the quote.

CRM Example Company | Abigail Milne

Save Quote

Case: Subject: Potential sale of 5 machines.

Quote: * A quote will only be created if you add quote line items.
 * Customer: Hope Works
 * Quote Contact: Stewart Hope
 Quote Reference: RRF00000
 Reference: HWQ202
 Comments: Customer requires on-site evaluation.
 Date: 4 Nov 2019
 * Site: Durban
 * Print Layout: HOP001_SALESQUOTE

Quote Financials:
 * Currency: South African Rand
 Tax Rate: 15.00
 * Exchange Rate: 1.0000
 Quote Terms: Full Payment COD
 Commercial: Default

Quote Items:

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	2	5610.67	5400.00		10800.00		12420.00	
							10800.00		12420.00	

Save

1. As you start typing in the field, the **Type**, **Code** and **Description** list will again be displayed.
2. The system will filter for the item that you are searching for.
3. Select the applicable item from this list.

CRM Example Company | Abigail Milne

Save Quote

Case: Subject: Potential sale of 5 machines.

Quote: * A quote will only be created if you add quote line items.
 * Customer: Hope Works
 * Quote Contact: Stewart Hope
 Quote Reference: RRF00000
 Reference: HWQ202
 Comments: Customer requires on-site evaluation.
 Date: 4 Nov 2019
 * Site: Durban
 * Print Layout: HOP001_SALESQUOTE

Quote Financials:
 * Currency: South African Rand
 Tax Rate: 15.00
 * Exchange Rate: 1.0000
 Quote Terms: Full Payment COD
 Commercial: Default

Quote Items:

Type	Code	Description	Q	U	P	T	A	T
INVN	2020-147K	Black toner SP2020	2					
INVN	SP19-147K	Black Toner SP1919	4					
INVN	147-888544	K147 Black toner	14					
INVN	12-098765	SP19-12 Black Toner	23					
INVN	204-147K	SP204 Black Toner	27					
INVN	147258	Black Toner	31					
INVN	540-147K	Compatible black toner	55					

Save

1. The additional item code and description will populate the **Add** item field.
2. Click on the **plus [+]** button.

CRM Example Company Abigail Milne

Save Quote

+ Case Subject: Potential sale of 5 machines.

- Quote

* A quote will only be created if you add quote line items.

* Customer: Hope Works
 * Quote Contact: Stewart Hope
 Quote Reference: REF00000
 Reference: HWQ202
 Comments: Customer requires on-site evaluation.

Date: 4 Nov 2019
 * Site: Durban
 * Print Layout: HOP001_SALESQUOTE

- Quote Financials

* Currency: South African Rand
 Tax Rate: 15.00
 Exchange Rate: 1.0000

Quote Terms: Full Payment COD
 Commercial: Default

- Quote Items

Add Item: INVN | 2020-147K | Black toner SP2020
 Add template: Add sales template items

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	2	5610.67	5400.00		10800.00		12420.00	
				5610.67	5400.00	0.00	10800.00		12420.00	

Save

1. The additional item will be added to the **Quote Items** frame.
2. Edit the details, if required.
3. The quote **Total Inclusive** amount will update to include this item.

SAVE QUOTE

4. When you have finished adding items to the Quote sections, click on **Save**.

CRM Example Company | Abigail Milne

Save Quote

Case Subject: Potential sale of 5 machines.

Quote * A quote will only be created if you add quote line items.
 * Customer: Hope Works
 * Quote Contact: Stewart Hope
 Quote Reference: REF00000
 Reference: HWQ202
 Comments: Customer requires on-site evaluation.
 Date: 4 Nov 2019
 * Site: Durban
 * Print Layout: HOP001_SALESQUOTE

Quote Financials
 * Currency: South African Rand
 Tax Rate: 15.00
 * Exchange Rate: 1.0000
 Quote Terms: Full Payment COD
 Commercial: Default

Quote Items

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	2	5610.67	5400.00		10800.00		12420.00	
INVN	2020-147K	Black toner SP2020	1	481.70	526.63	526.63	526.63		605.62	
				6092.37	5926.63	526.63	11326.63		13025.62	

Save

1. A message box will appear at the top of the page informing you that:
 - **Quote saved successfully**
2. The system will have allocated a Quote Reference Number.

There are now 4 processing options available in this page:

3. [Delete](#)
 4. [View](#)
 5. [Save](#)
 6. [Copy](#)
7. For the purpose of this manual, we have selected the Customers icon to return to the **Customer Dashboard** (Customer Home page).

Quote saved successfully.

Save Quote

Subject: Potential sale of 5 machines.

Quote Details:

- Customer: Hope Works
- Quote Contact: Stewart Hope
- Quote Reference: QT0000216
- Reference: HWQ202
- Comments: Customer requires on-site evaluation.
- Date: 4 Nov 2019
- Site: Durban
- Print Layout: HOP001_SALESQUOTE

Quote Financials:

- Currency: South African Rand
- Tax Rate: 15.00000
- Exchange Rate: 1.0000
- Quote Terms: Full Payment COD
- Commercial: Default

Quote Items:

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	2.00	5610.67	5400.00	5400.00	10800.00		12420.00	
INVN	2020-147K	Black toner SP2020	1.00	481.70	526.63	526.63	526.63		605.62	
			3.00	6092.37	5926.63	5926.63	11326.63		13025.62	

Buttons: Delete, View, Save, Copy

View New Quote from the Customer Dashboard

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

The screenshot shows a CRM dashboard for 'Example Company' with the user 'Abigail Milne'. The main navigation bar includes a 'Hope Works' menu item (marked with a '1') and a search bar. The dashboard is divided into several sections:

- Activities for Last 30 Days:** A table with columns for Description, Target, Existing Custmrs, and New Custmrs.

Description	Target	Existing Custmrs	New Custmrs
Phone call	20	3	2
Email	30	3	1
Meeting	20	0	2
On Site inspection	20	1	0
Site inspection	2	0	0
- 1 Month Performance:** A bar chart showing values for Cases, Invoices, Orders, and Quotes. The Y-axis ranges from 0.00 to 50,000.00.
- 4 Month Pipeline:** A bar chart showing values for Nov 2019, Dec 2019, Jan 2020, and Feb 2020. The Y-axis ranges from 0.00 to 6,000.00.
- Hope Works - HOP001:** A detailed view of the customer profile, including a logo, trading name, registered name, VAT number, registration number, rank, website, and phone number. A '91%' completion indicator is shown.
- 12 Months Sales History:** A bar chart showing Contract Income (yellow) and Sales Revenue (blue) from January 2018 to January 2019. The Y-axis ranges from 0 to -400.

At the bottom of the dashboard, there is a grid of icons for various functions: create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files. A '2' is placed over the 'credit notes' icon.

1. The **Quotes for [selected customer]** page will open.
2. The quote that you linked to the Case, can still be viewed in this listing page.
3. Use the **Page Reference field** or the **Filter Row** to search for the quote if it not listed on the first open page.

Either

4. Click on **Back**

Or

5. Click on the **Customer icon**

to return to the **Customer Dashboard** (Customer Home page).

CRM Example Company Abigail Milne

Quotes for Hope Works ← 4 →

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000202	HOP001	Hope Works	toner	600.36	ZAR	17 Nov 2017	Order generated	Yes
QT0000203	HOP001	Hope Works	test	14073.30	ZAR	18 Dec 2017	Order generated	Yes
QT0000204	HOP001	Hope Works	1234	20932.74	ZAR	29 Jan 2018	Order generated	Yes
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	New quote	Yes
QT0000210	HOP001	Hope Works	HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000214	HOP001	Hope Works	HWQ202	18630.00	ZAR	24 Oct 2019	New quote	No
QT0000217	HOP001	Hope Works	HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

Page 10 of 10 (99 items) Page size: 10

View the linked Quote via the Cases tile

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

The screenshot displays a CRM dashboard for 'Example Company' with user 'Abigail Milne'. The main focus is on the 'Hope Works' customer profile (HOP001). The interface includes a navigation menu on the left with 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'. The 'cases' icon is highlighted with a green box and a circled '2'. At the top, the 'Hope Works' name is highlighted with a blue box and a circled '1'. The dashboard features several data visualizations: 'Activities for Last 30 Days' table, '1 Month Performance' bar chart, '4 Month Pipeline' bar chart, and '12 Months Sales History' bar chart. Customer details such as 'Trading Name', 'Registered Name', 'Description', 'VAT No', 'Registration', 'Rank', 'Website', and 'Phone' are listed on the right. The bottom of the screen shows the CO3 Technologies logo and version information.

Description	Target	Existing Custmrs	New Custmrs
Phone call	20	3	2
Email	30	3	1
Meeting	20	0	2
On Site inspection	20	1	0
Site inspection	2	0	0

1. The **Cases for [selected customer]** listing page will open.
2. **Hover over** the Case to display the **Action buttons**.
3. Click on either the **View/Edit this Case** icon or the **View Case Info and History** icon.

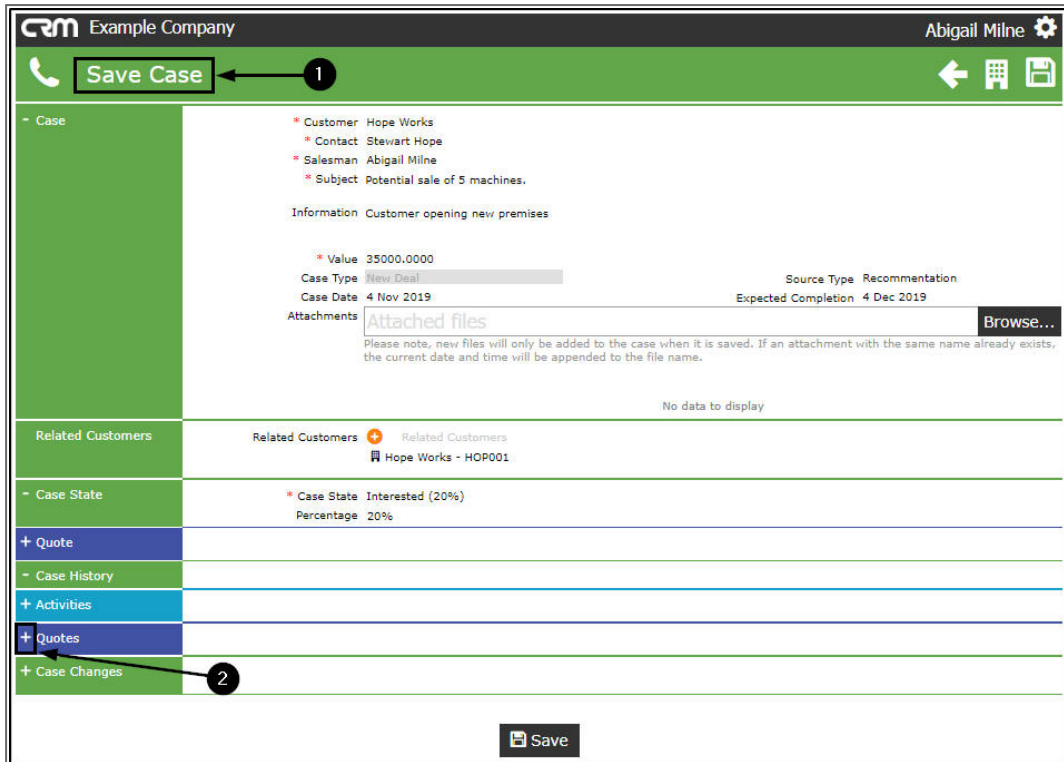
CRM Example Company Abigail Milne

Cases for Hope Works

Subject	Contact Name	Customer Name	Case State Description	Is Pipeline Case
test	Customer Kelly Jones , Hope Works			No
SP1589 - client interested	Customer Matthew Thompson , Hope Works			No
Test newest CRM 3.4.3.0	Customer Matthew Thompson , Hope Works			No
new test of case types	Customer Kelly Jones , Hope Works			No
Time will open doors	Customer Kelly Jones , Hope Works			No
Email new brochures	Customer Duncan McCreddie , Hope Works			No
New product range	Customer John West , Hope Works			No
Email updated copier price list	Customer Duncan McCreddie , Hope Works			No
Call Customer to arrange meeting time	Customer Michael Jackson , Hope Works			No
Assess new site for potential machine installation.	Customer John West , Hope Works			No
Potential sale of 5 machines.	Customer Stewart Hope , Hope Works Case Customer opening new premises Value 35000.00 Relative Value 7000.00 Case Date 04 Nov 2019		Case State Interested Percentage 20.00 % Expected Completion 04 Dec 2019	No

Page 1 of 1 (11 items) [1] [2] [3] Page size: 20

1. Either option will take you to the **Save Case** page.
2. Click on the **Expand** icon in the **Quotes** frame.



1. The linked Quote can be [viewed](#), [edited](#), [copied](#), [accepted](#) or [rejected](#) from this **Save Case** page.

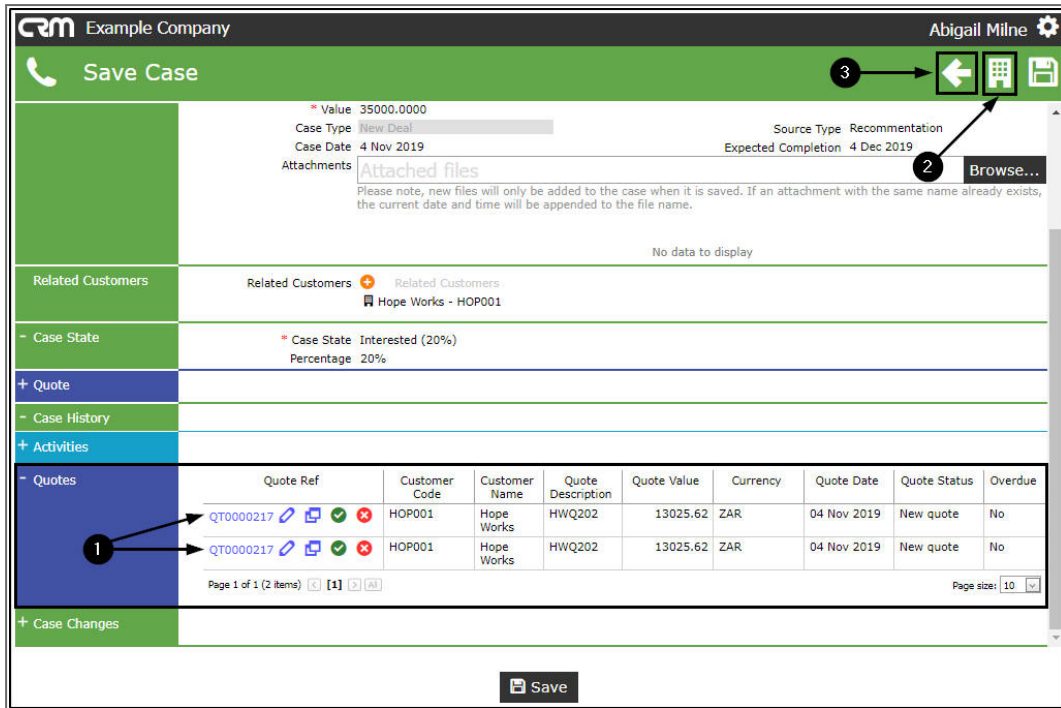
Either

2. Click on **Back**

Or

2. Click on the **Customers** icon

to return to the **Customer Dashboard** (Customer Home page).



VIEW THE ENTIRE CASE LIST FROM THE DASHBOARD (HOME PAGE)

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

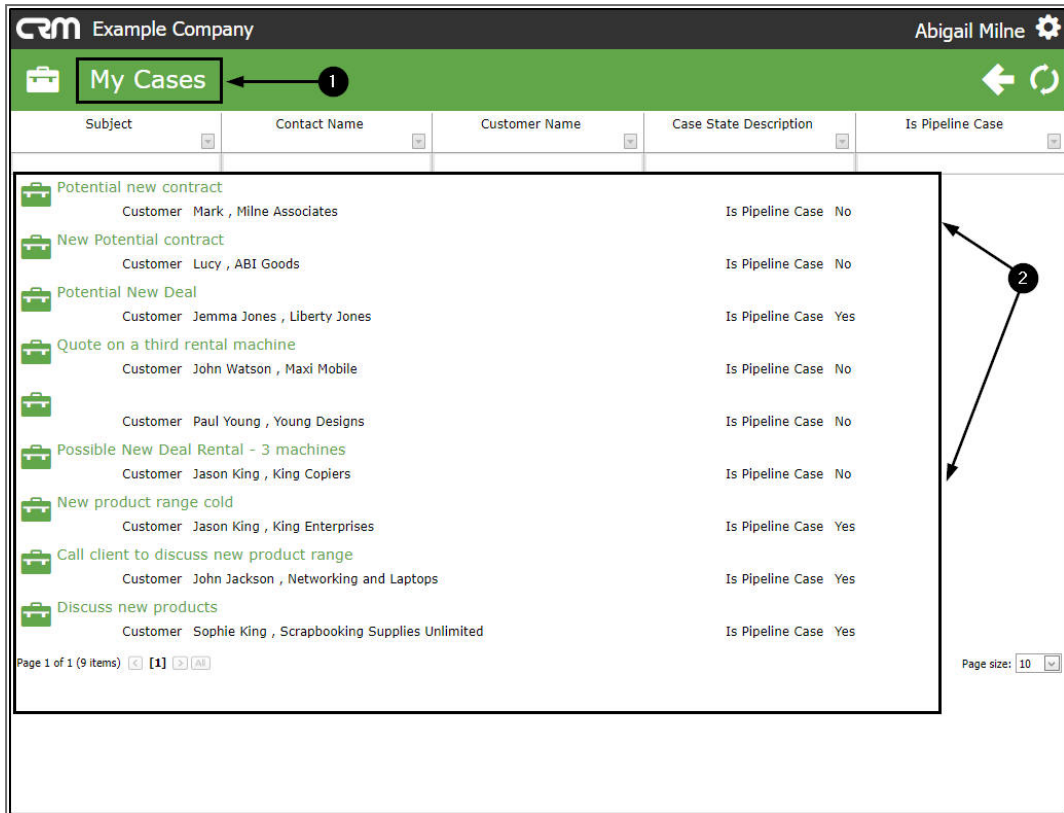
The screenshot shows a CRM dashboard for 'Example Company' with user 'Abigail Milne'. The dashboard features several sections:

- Dashboard:** A navigation menu with a 'Dashboard' link highlighted by a blue box and a '1' notification badge.
- Activities for Last 30 Days:** A table with columns: Description, Target, Existing Custmrs, and New Custmrs.

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	5
Email	30	0	2
Meeting	40	0	1
On Site inspection	50	0	1
Site inspection	2	0	0
- 1 Month Performance:** A bar chart showing performance for Cases, Invoices, Orders, and Quotes.
- 4 Month Pipeline:** A bar chart showing pipeline values for Jul 2019, Aug 2019, Sep 2019, and Oct 2019.
- Navigation Tiles:** A grid of tiles for various functions: create cold call, recommendations, warnings, customers (74), cases (9), activities (9), quotes (5), equipment (147), and 3rd party (4). The 'cases' tile is highlighted with a green box and a '2' callout.
- Case Listing:** A list of cases with a search bar and filters. The first case is:
 - Phone call - King Enterprises: Confirm meeting times with new Purchasing Manager**
 - When:** 23 Jul 2019, 17:00-18:00
 - Who:** Jason King, King Enterprises
 - Tel:**
 - Email:**
 - Cell:**
 - Bus:** 0123456789

THE MY CASES LISTING SCREEN

- The **My Cases** listing page will be displayed.
- Here you can view the entire case list for all customers.



1. Hover anywhere over a case in this list to reveal the **Action** buttons.
2. **Single click** on a Case to access a **quick view summary** of the Case information and to view the **Action** buttons.
3. Click on the **Case** icon to return to the **Dashboard** (Home page).

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main heading is 'Cases for King Copiers'. Below it is a table with columns: Subject, Contact Name, Customer Name, Case State Description, and Is Pipeline Case. A detailed view of a case is shown below the table, titled 'Possible New Deal Rental - 3 machines'. The detailed view includes a table with the following data:

Customer	Jason King , King Copiers	Is Pipeline Case	No
Case		Case State	Meeting
Value	0.00	Percentage	25.00 %
Relative Value	0.00	Expected Completion	21 Jul 2019
Case Date	21 Jun 2019		

Navigation arrows labeled 1, 2, and 3 point to the 'Cases for King Copiers' header, the table, and the detailed view respectively.

Related Topics

- [CRM Basics: Cases.](#)

CRM.002.004