CRM CUSTOMERS

SALES ORDERS

You can view, download, print and/or email Sales Orders for your Customers in CRM.

However, Sales Orders are ***created*** in BPO only.

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

NAVIGATE TO CUSTOMER DASHBOARD (CUSTOMER HOME PAGE)

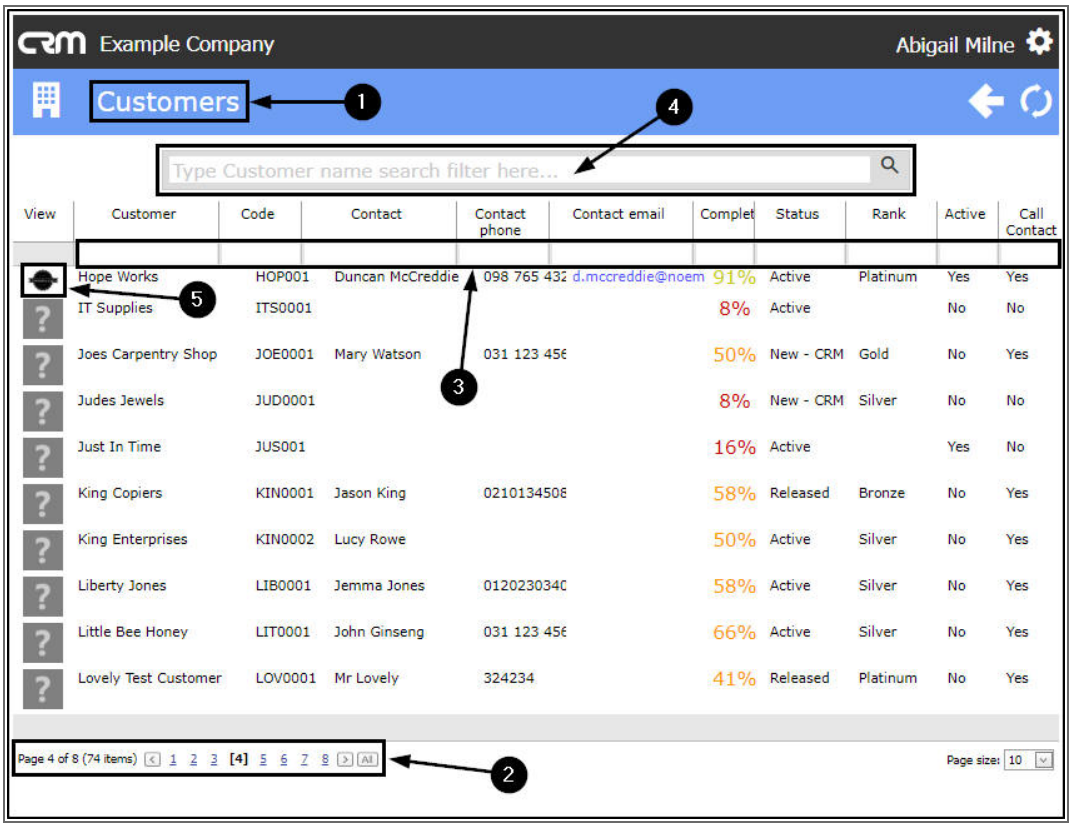
To access your customer-specific list of Sales Orders, you will first need to navigate to the Customer Dashboard (Customer Home page).

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

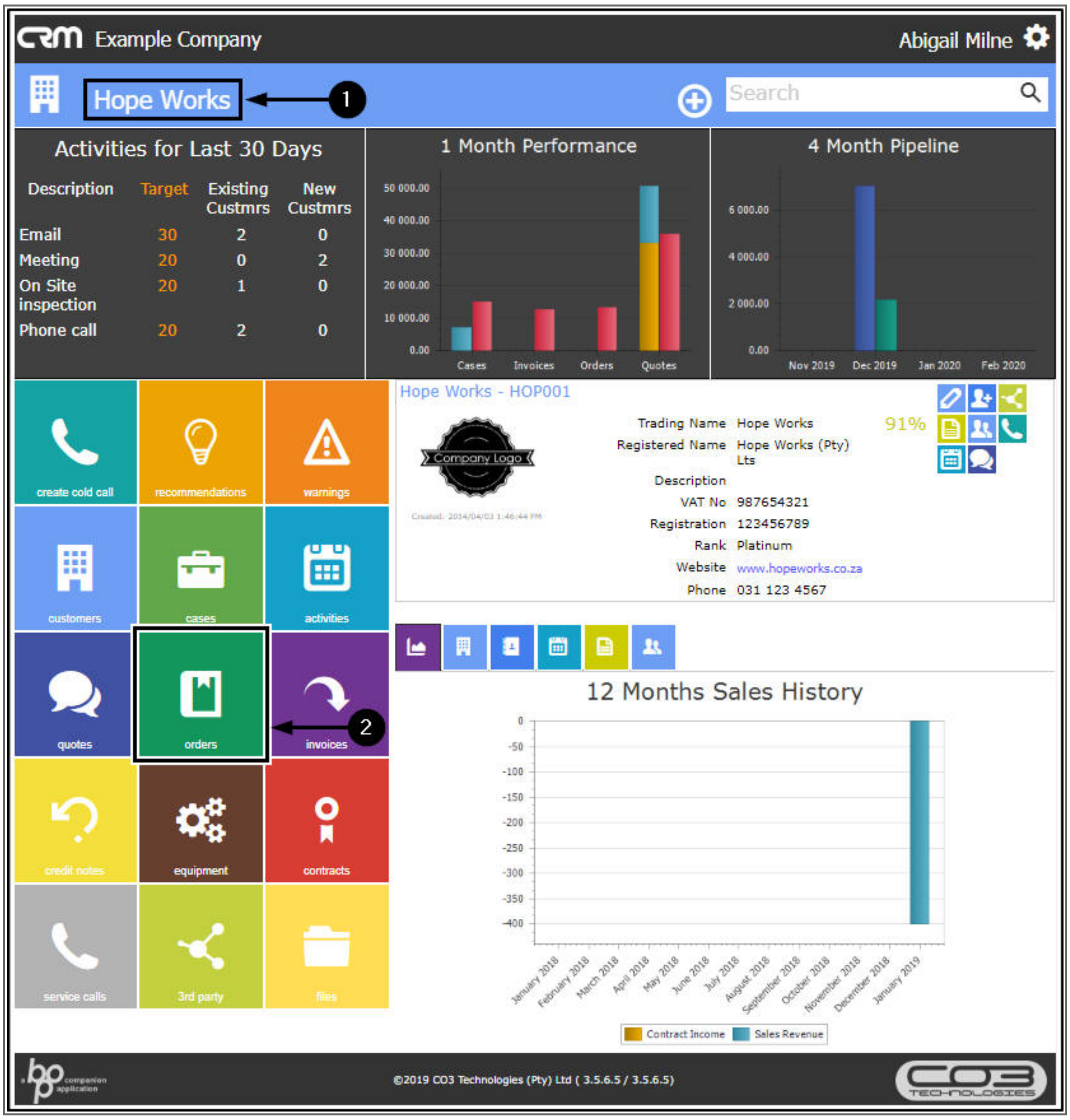
1. The ***Customers*** listing page will open.

SEARCH FOR AND SELECT THE CUSTOMER

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.



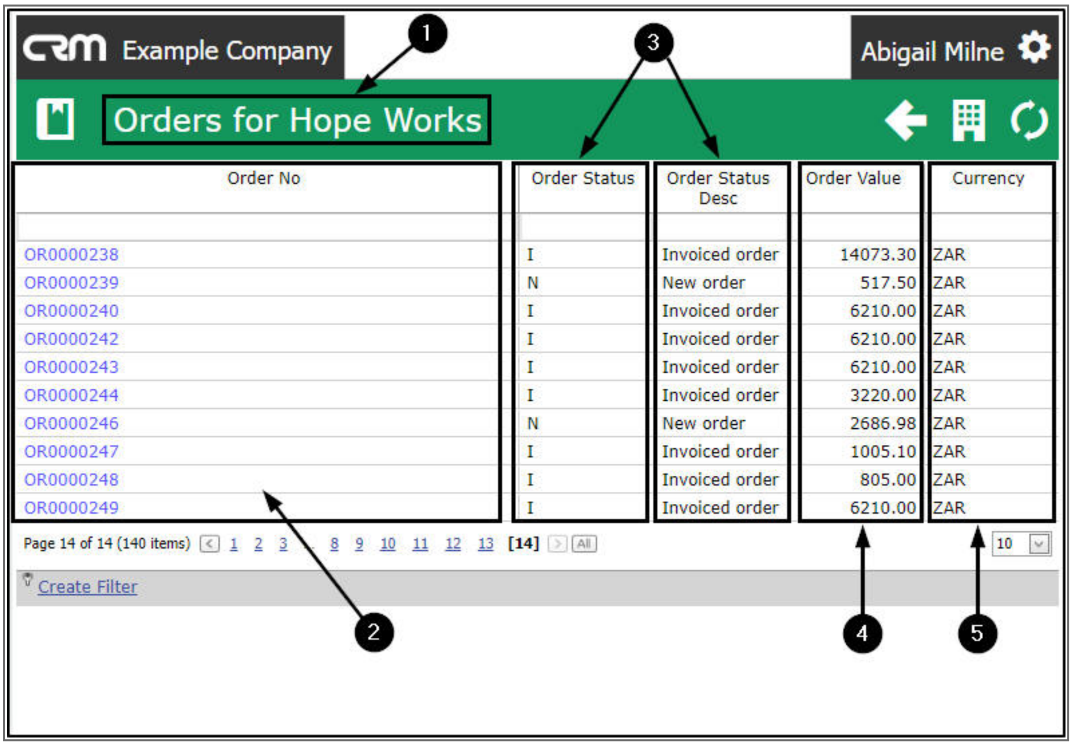
1. The ***Customer Dashboard*** (Customer Home page) will open.
2. Click on the ***Orders*** tile.



THE ORDERS FOR *[SELECTED CUSTOMER]* LISTING PAGE

1. The ***Orders for [selected customer]*** listing page will open.
2. All of the Orders linked to this customer will be displayed (even ones where you are not the Salesman).
3. The **Order Status** and **Order Status Description** can be viewed (e.g. I = Invoiced Order, N = New Order).

4. Each **Order Value** can be viewed.
5. The **Currency** of each Order can be viewed.

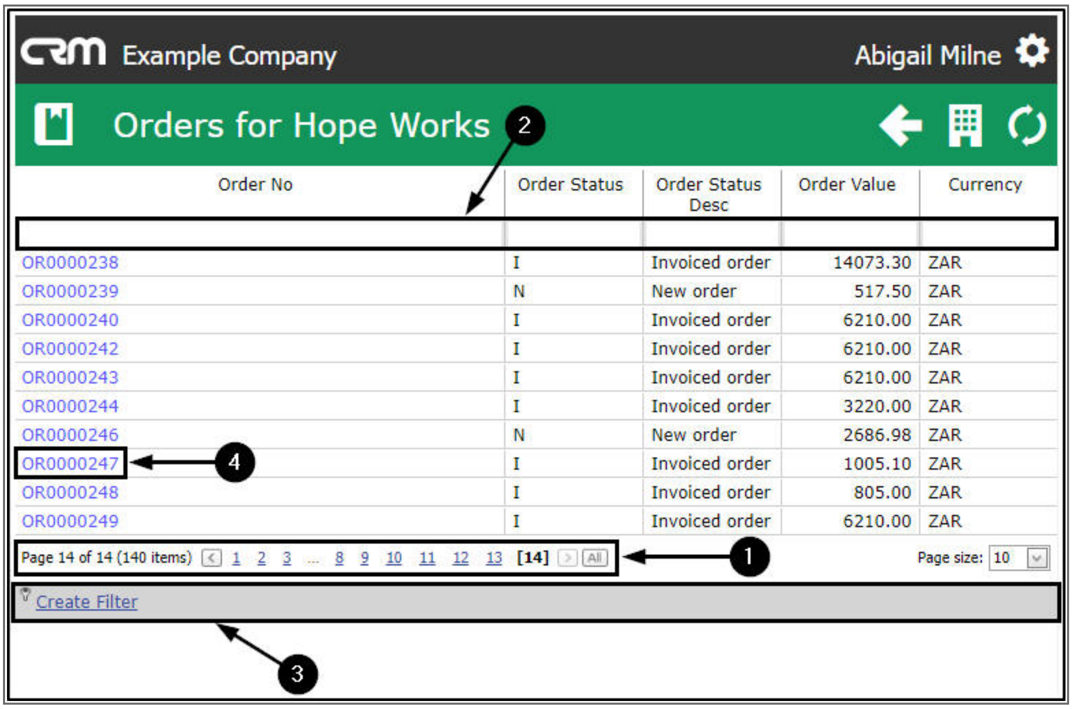


SEARCH FOR AND SELECT AN ORDER

1. You can use the Page Reference field or the
2. Filter Row or the
3. Create Filter Row functionality to search for a particular Order.

VIEW, DOWNLOAD OR PRINT CUSTOMER ORDER

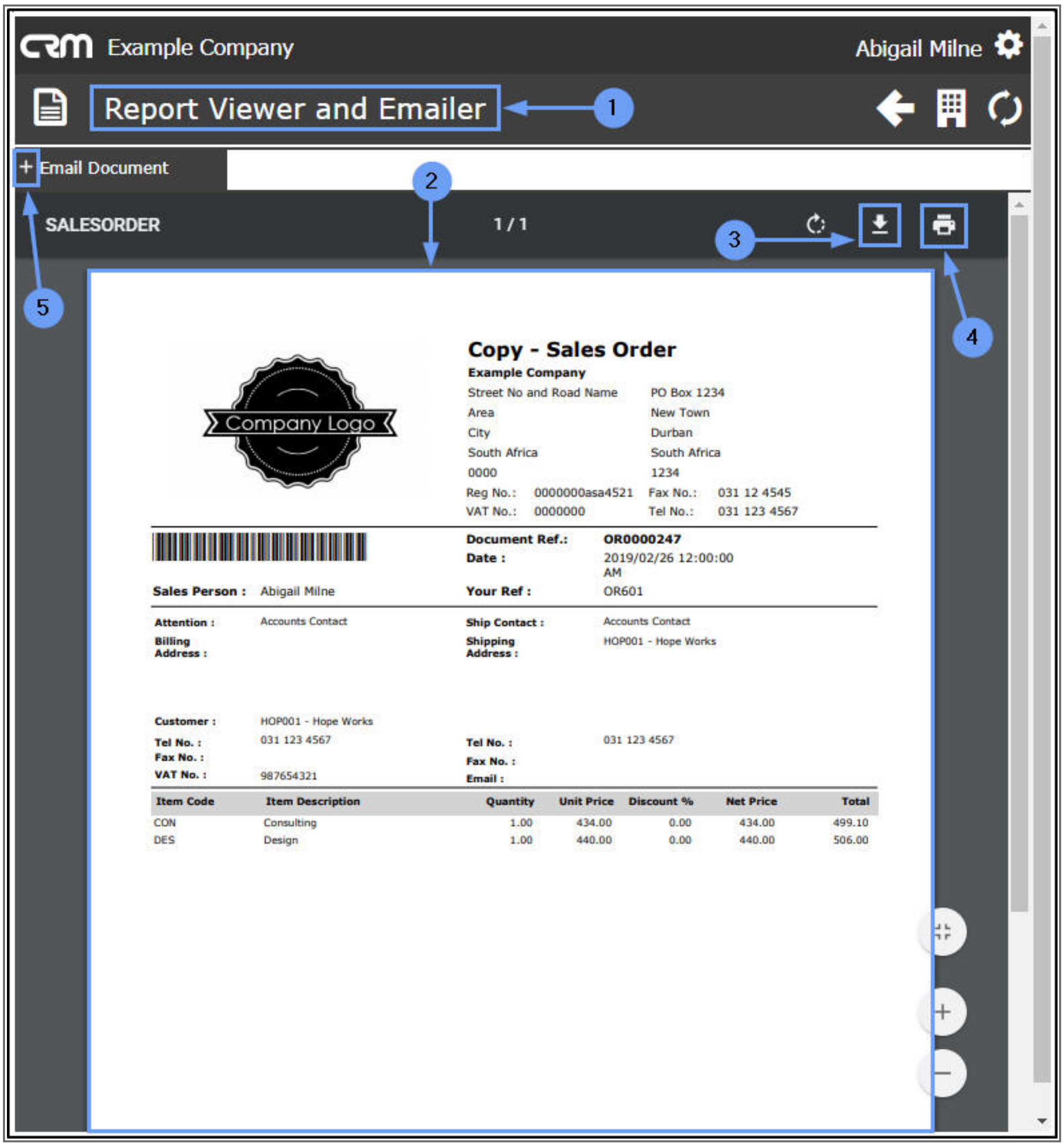
4. In the ***Order No.*** column, click on the blue number of the Order that you wish to ***View***, ***Print*** or ***Download***.



1. The ***Report Viewer and Emailer*** page will open.
2. The selected Order will be displayed.
3. Here you can ***Download*** the Order and/or
4. ***Print*** the Order.

EMAIL ORDER

5. Click on the expand icon [**+**] on the ***Email Document*** tab.



1. The ***Email Document*** frame will be expanded.

   Check and/or add the following details, as necessary:

2. **To:** Either click in the field and select the preferred contact from the list, or type in the contact email address.
3. **Cc:** Here, you can add other email recipients, if applicable.
   - Either click in the field and select customer contacts from the list, or type in additional addresses as noted above

(separated by a semi-colon and a space).

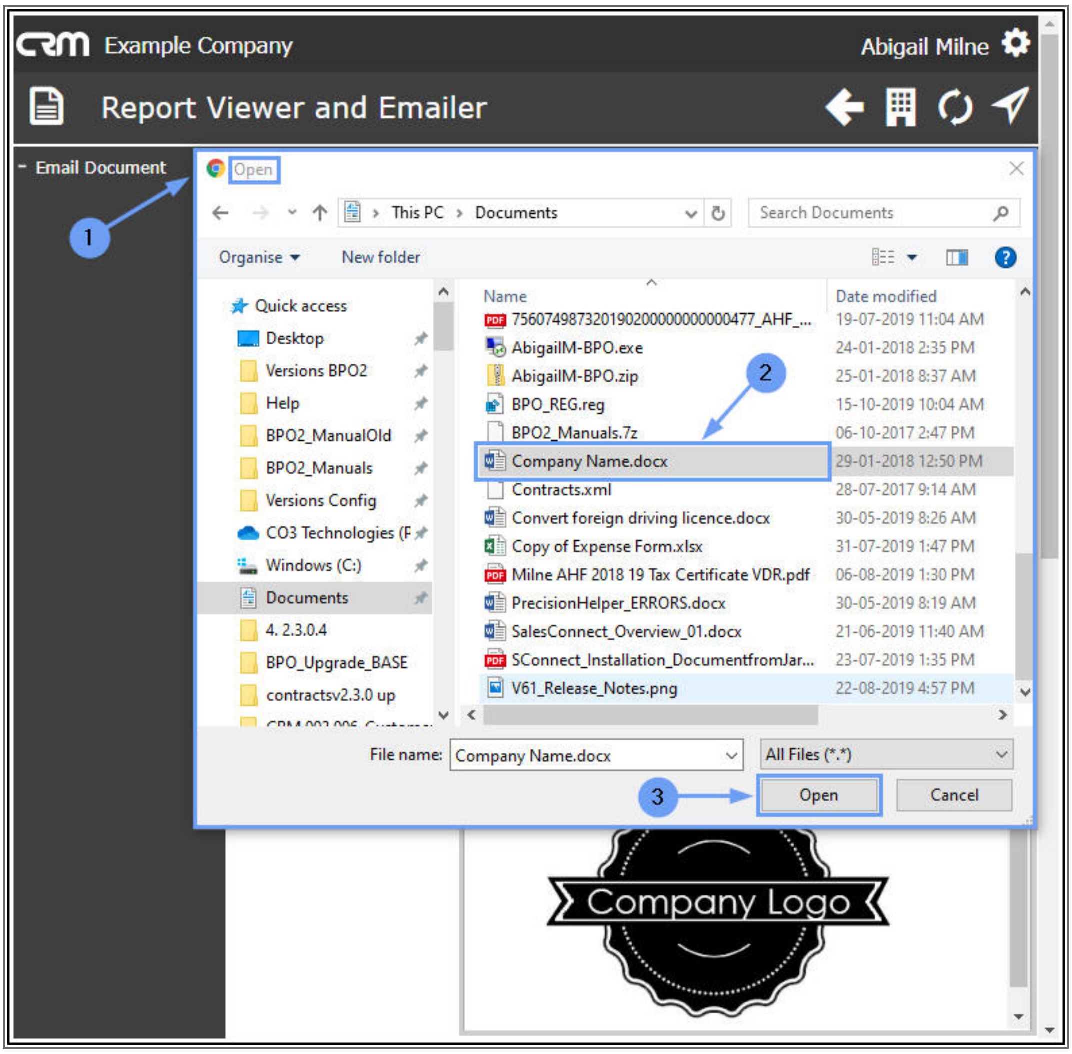
4. **Subject:** This field will auto populate with ***Sales Order*** but you can edit this, if required.

ADD AN ATTACHMENT

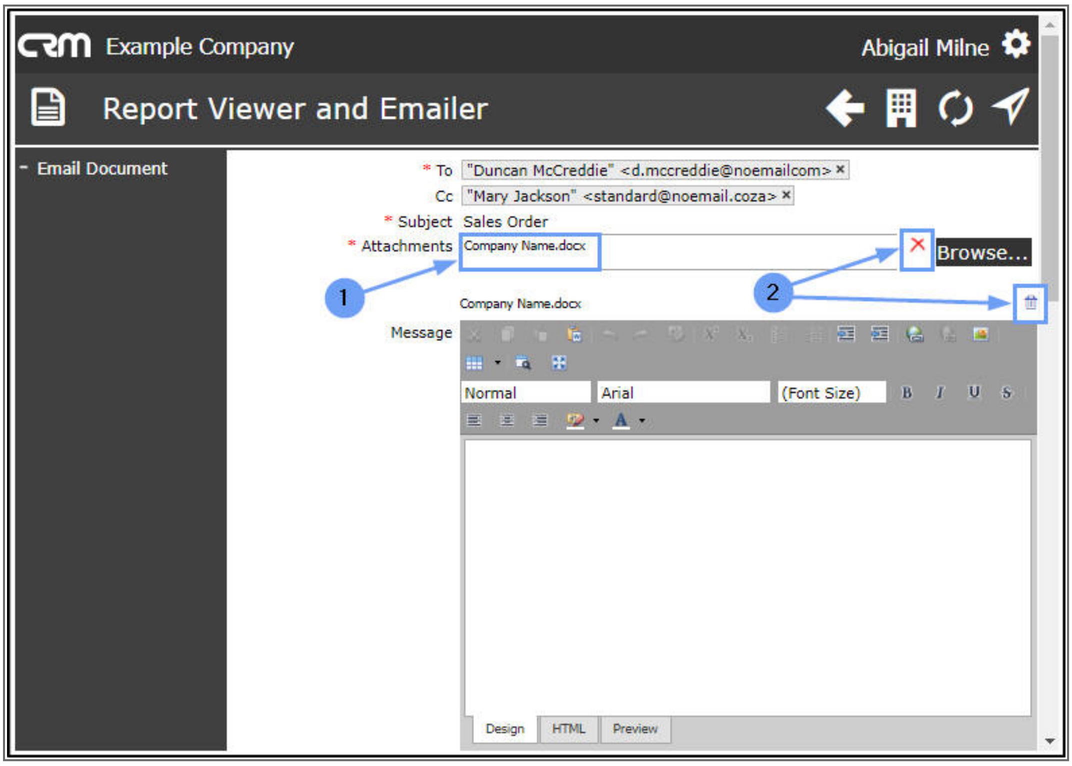
You can add other documents, as attachments, if required.

5. **Attachments:** Click on ***Browse***.

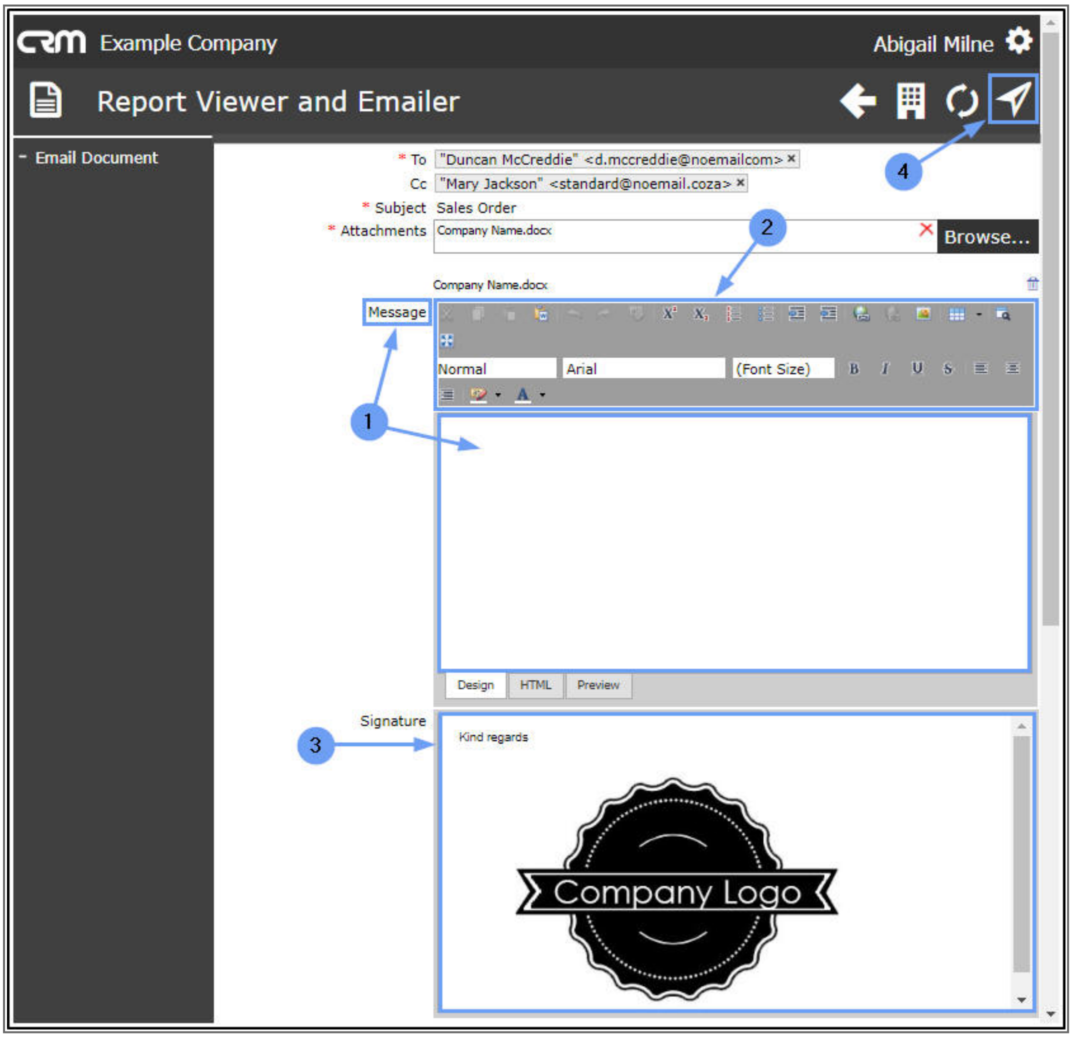
1. The ***Open*** screen will pop up.
2. Search for and select the file you wish to link to this Order.
3. Click on ***Open***.



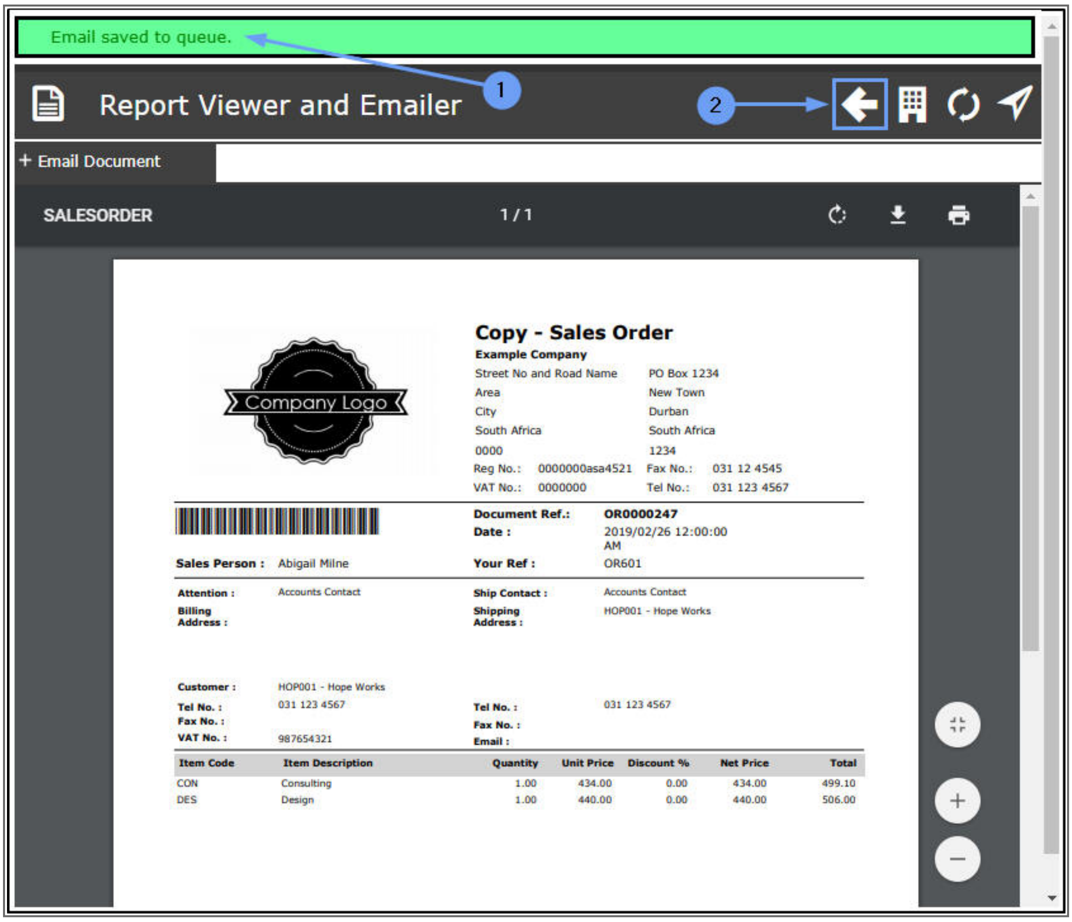
1. The file will now be attached to the email.
2. You can delete the attachment if required by clicking on either of the ***Delete*** icons.



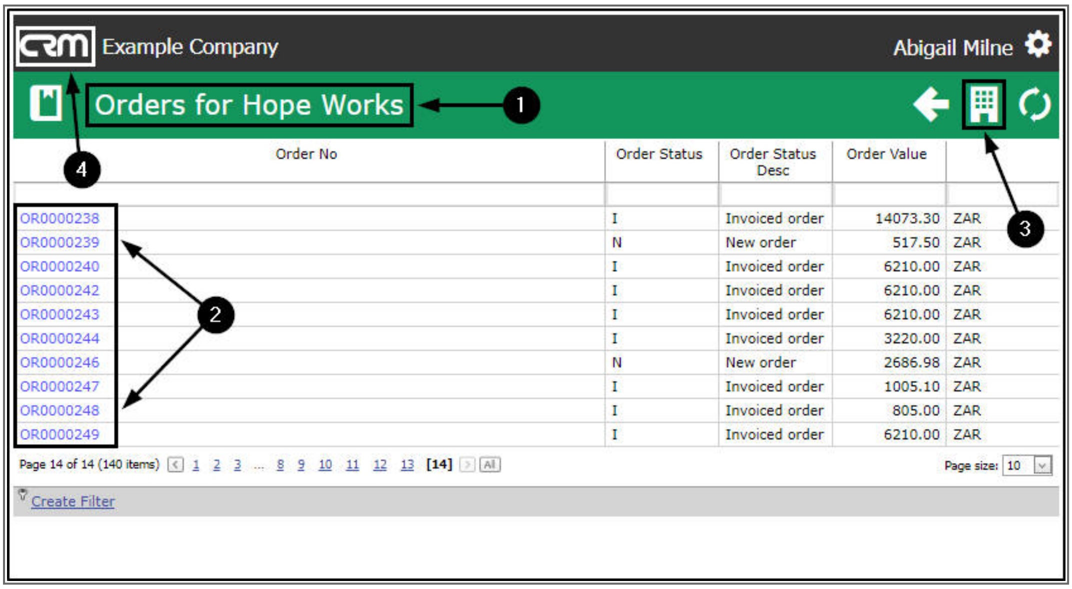
1. Type a relevant message in the ***Message*** body.
2. The ***Message tool bar*** can be used to customise your email message.
3. **Signature**: If you have a Signature configured in CRM - your Signature will pull through here, otherwise the Company default CRM mail signature will pull through.
4. Click on the ***Send*** icon.



1. A ***message box*** will pop up informing you of the status of the sent email.
2. Click on ***Back*** .



1. You will return to the ***Orders for [****selected customer****]*** listing page.
2. Select another Order to View, Download, Print or Email, if required.
3. Click on the ***Customers*** icon to return to the ***Customer Dashboard*** (Customer Home page).
4. Click on the ***CRM*** icon to return to the ***Dashboard*** (Home page).


CRM Example Company
Abigail Milne
Orders for Hope Works
1
2
3
4
Order No
Order Status
Order Status Desc
Order Value
OR0000238 I Invoiced order 14073.30 ZAR
OR0000239 N New order 517.50 ZAR
OR0000240 I Invoiced order 6210.00 ZAR
OR0000242 I Invoiced order 6210.00 ZAR
OR0000243 I Invoiced order 6210.00 ZAR
OR0000244 I Invoiced order 3220.00 ZAR
OR0000246 N New order 2686.98 ZAR
OR0000247 I Invoiced order 1005.10 ZAR
OR0000248 I Invoiced order 805.00 ZAR
OR0000249 I Invoiced order 6210.00 ZAR
Page 14 of 14 (140 items) 1 2 3 ... 8 9 10 11 12 13 [14]
Page size: 10
Create Filter

CRM.002.007