

# 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.

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main navigation bar has a 'Customers' tab (1) and a search bar (4) with the placeholder text 'Type Customer name search filter here...'. Below the navigation is a table of customer data. The table has columns: View, Customer, Code, Contact, Contact phone, Contact email, Complet, Status, Rank, Active, and Call Contact. The data rows are as follows:

View	Customer	Code	Contact	Contact phone	Contact email	Complet	Status	Rank	Active	Call Contact
<input checked="" type="checkbox"/>	Hope Works	HOP001	Duncan McCreddie	098 765 432	d.mccreddie@noem	91%	Active	Platinum	Yes	Yes
<input type="checkbox"/>	IT Supplies	ITS0001				8%	Active		No	No
<input type="checkbox"/>	Joes Carpentry Shop	JOE0001	Mary Watson	031 123 456		50%	New - CRM	Gold	No	Yes
<input type="checkbox"/>	Judes Jewels	JUD0001				8%	New - CRM	Silver	No	No
<input type="checkbox"/>	Just In Time	JUS001				16%	Active		Yes	No
<input type="checkbox"/>	King Copiers	KIN0001	Jason King	0210134506		58%	Released	Bronze	No	Yes
<input type="checkbox"/>	King Enterprises	KIN0002	Lucy Rowe			50%	Active	Silver	No	Yes
<input type="checkbox"/>	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	Active	Silver	No	Yes
<input type="checkbox"/>	Little Bee Honey	LIT0001	John Ginseng	031 123 456		66%	Active	Silver	No	Yes
<input type="checkbox"/>	Lovely Test Customer	LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes

At the bottom of the table, there is a pagination control (2) showing 'Page 4 of 8 (74 items)' with navigation buttons for 1, 2, 3, 4, 5, 6, 7, 8, and a 'Page size' dropdown set to 10. A callout (5) points to the 'View' column of the first row.

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

**CRM Example Company** Abigail Milne

**Hope Works** Search

**Activities for Last 30 Days**

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

**1 Month Performance**

**4 Month Pipeline**

**Hope Works - HOP001** 91%

Trading Name: Hope Works  
Registered Name: Hope Works (Pty) Lts  
Description:  
VAT No: 987654321  
Registration: 123456789  
Rank: Platinum  
Website: www.hopeworks.co.za  
Phone: 031 123 4567

**12 Months Sales History**

Contract Income Sales Revenue

©2019 CO3 Technologies (Pty) Ltd ( 3.5.6.5 / 3.5.6.5)

## 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.

Order No	Order Status	Order Status Desc	Order Value	Currency
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

## 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**.

CRM Example Company Abigail Milne

Orders for Hope Works

Order No	Order Status	Order Status Desc	Order Value	Currency
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

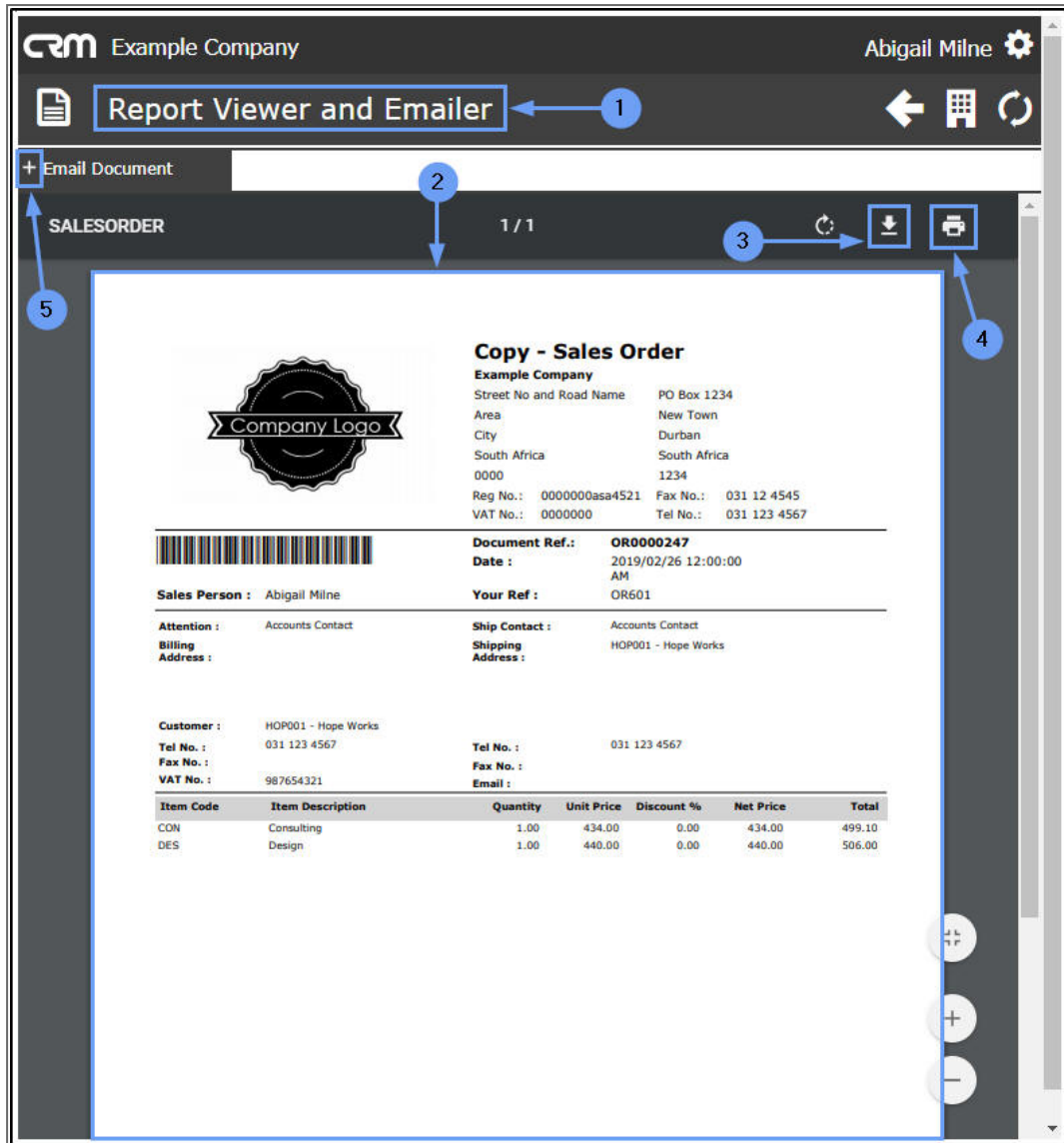
Page 14 of 14 (140 items) [1] [2] [3] ... [8] [9] [10] [11] [12] [13] [14] [All] Page size: 10

Create Filter

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

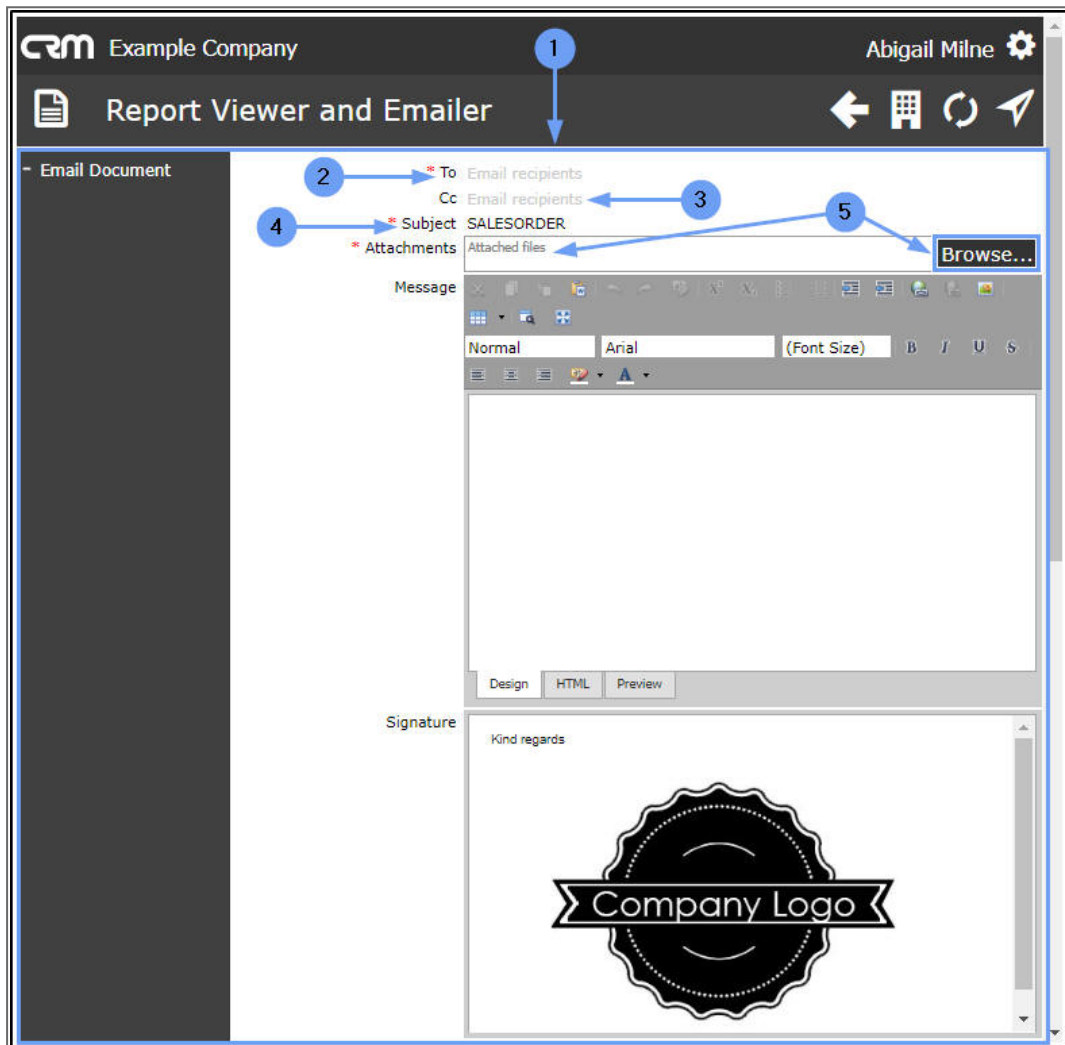
(separated by a semi-colon and a space).

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

## ADD AN ATTACHMENT

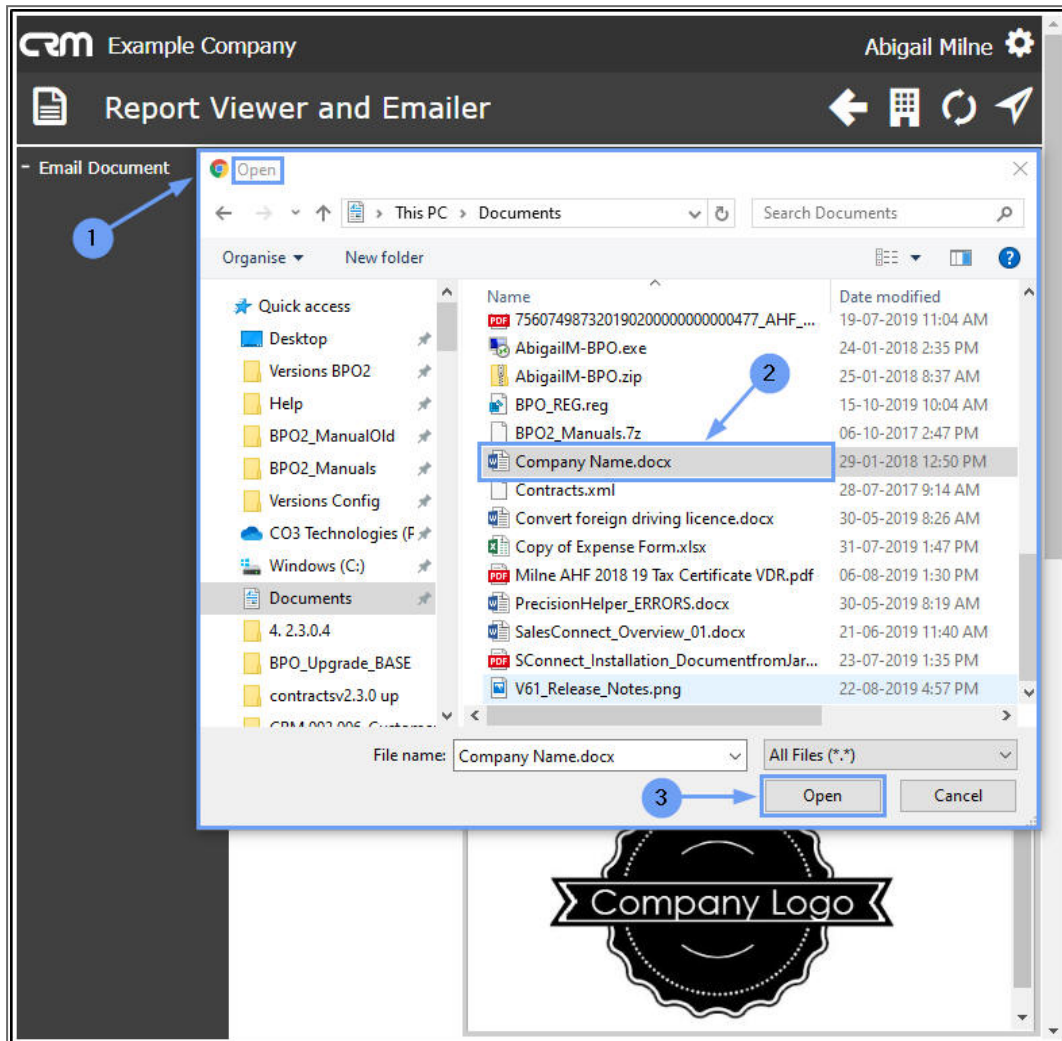
You can add other documents, as attachments, if required.

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

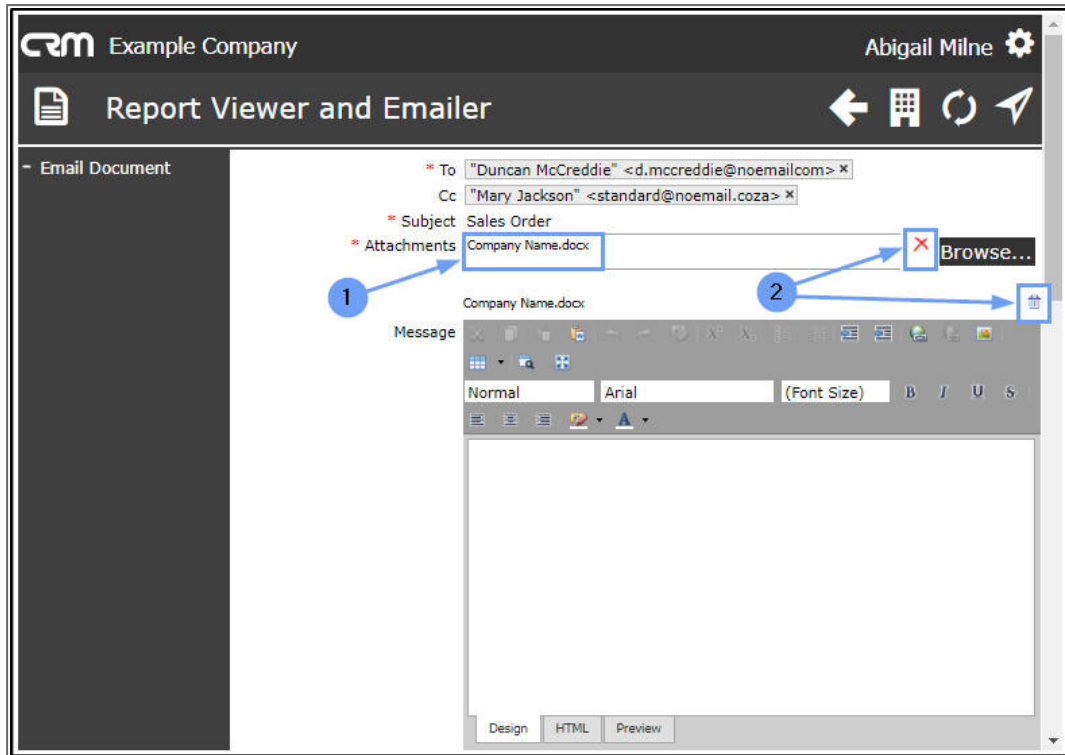




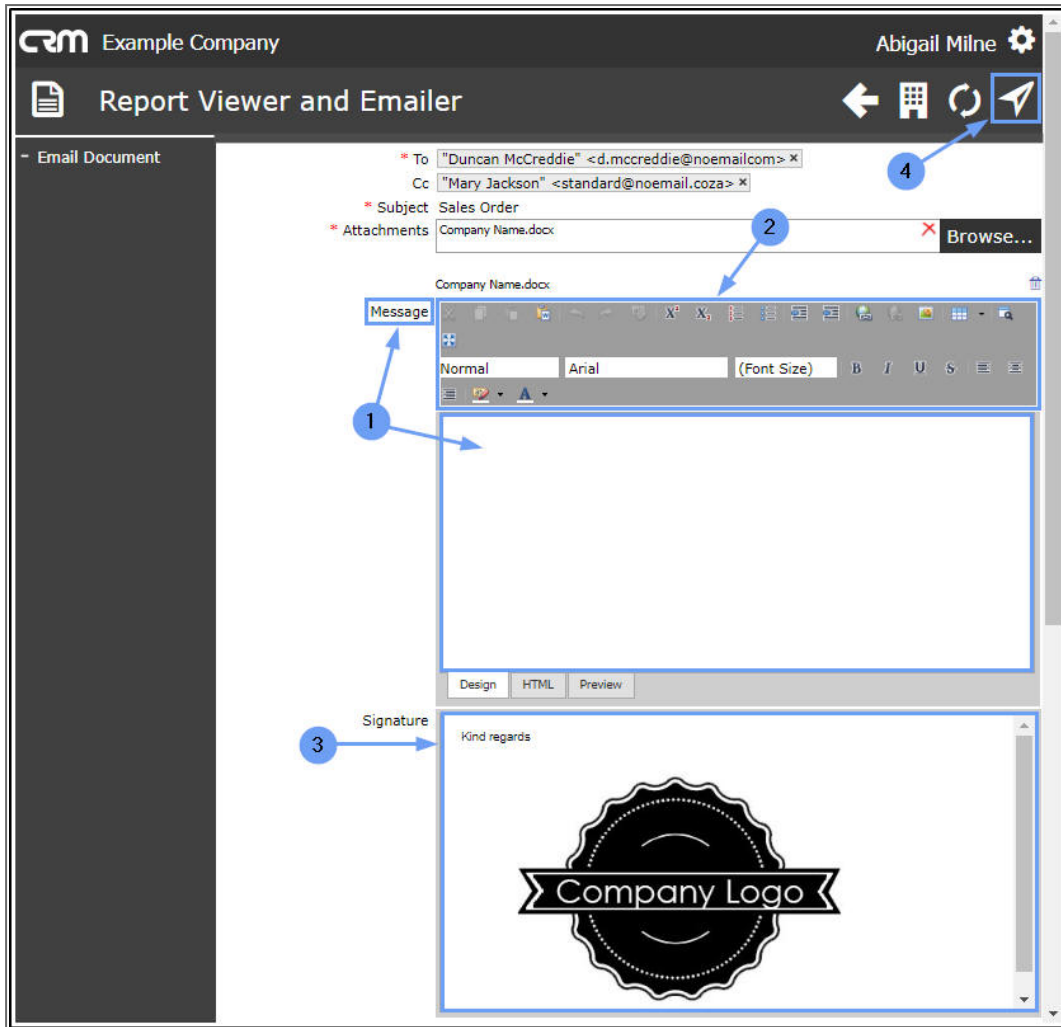
1. The **Open** screen will pop up.
2. Search for and select the file you wish to link to this Order.
3. Click on **Open**.



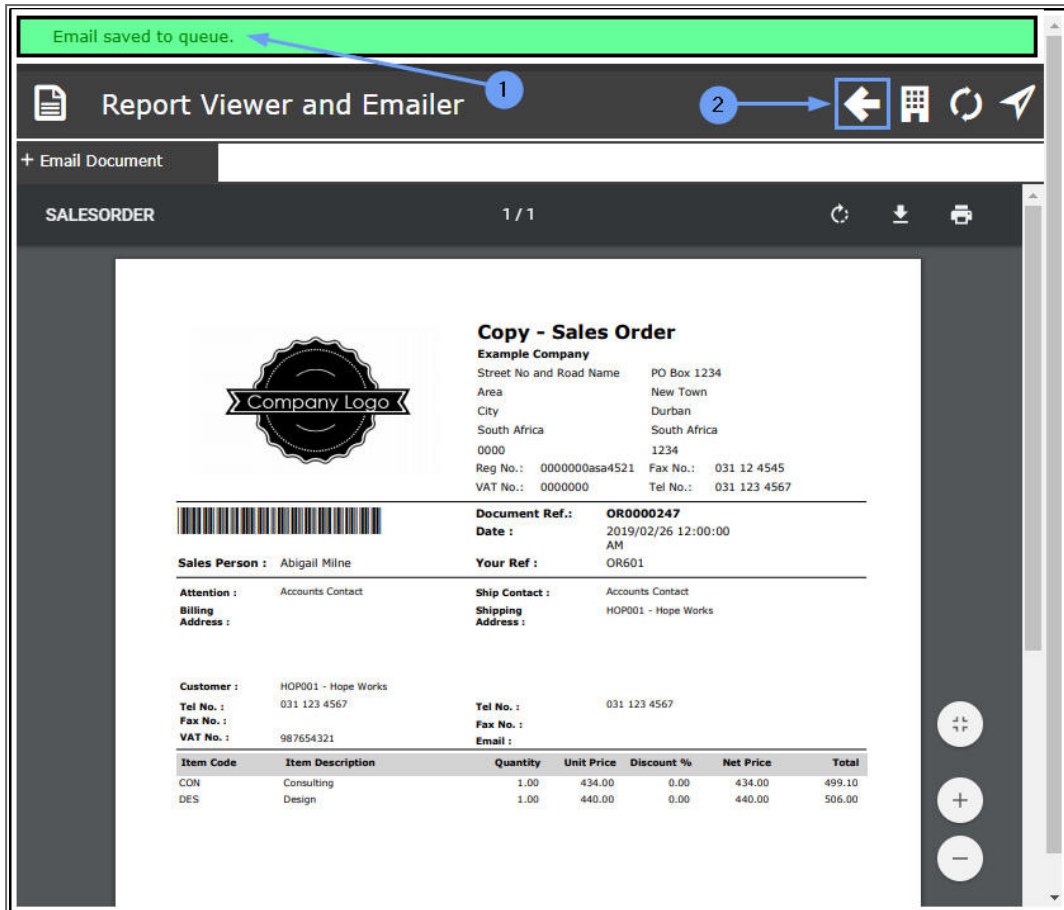
1. The file will now be attached to the email.
2. You can delete the attachment if required by clicking on either of the **Delete** icons.



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**.



Report Viewer and Emailer

SALESORDER 1 / 1

**Copy - Sales Order**

**Example Company**  
 Street No and Road Name PO Box 1234  
 Area New Town  
 City Durban  
 South Africa South Africa  
 0000 1234  
 Reg No.: 0000000asa4521 Fax No.: 031 12 4545  
 VAT No.: 0000000 Tel No.: 031 123 4567

Document Ref.: **OR0000247**  
 Date : 2019/02/26 12:00:00 AM  
 Your Ref : OR601

Sales Person : Abigail Milne

Attention : Accounts Contact  
 Billing Address :  
 Ship Contact : Accounts Contact  
 Shipping Address : HOP001 - Hope Works

Customer : HOP001 - Hope Works  
 Tel No. : 031 123 4567  
 Fax No. :  
 VAT No. : 987654321  
 Tel No. : 031 123 4567  
 Fax No. :  
 Email :

Item Code	Item Description	Quantity	Unit Price	Discount %	Net Price	Total
CON	Consulting	1.00	434.00	0.00	434.00	499.10
DES	Design	1.00	440.00	0.00	440.00	506.00

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
←

Order No	Order Status	Order Status Desc	Order Value	ZAR
<a href="#">OR0000238</a>	I	Invoiced order	14073.30	ZAR
<a href="#">OR0000239</a>	N	New order	517.50	ZAR
<a href="#">OR0000240</a>	I	Invoiced order	6210.00	ZAR
<a href="#">OR0000242</a>	I	Invoiced order	6210.00	ZAR
<a href="#">OR0000243</a>	I	Invoiced order	6210.00	ZAR
<a href="#">OR0000244</a>	I	Invoiced order	3220.00	ZAR
<a href="#">OR0000246</a>	N	New order	2686.98	ZAR
<a href="#">OR0000247</a>	I	Invoiced order	1005.10	ZAR
<a href="#">OR0000248</a>	I	Invoiced order	805.00	ZAR
<a href="#">OR0000249</a>	I	Invoiced order	6210.00	ZAR

Page 14 of 14 (140 items) ... **[14]** 
Page size:

Create Filter

CRM.002.007

