CRM CUSTOMERS

SERIALISED EQUIPMENT

In CRM, you can view serialised equipment items for the customer in 2 different screens:

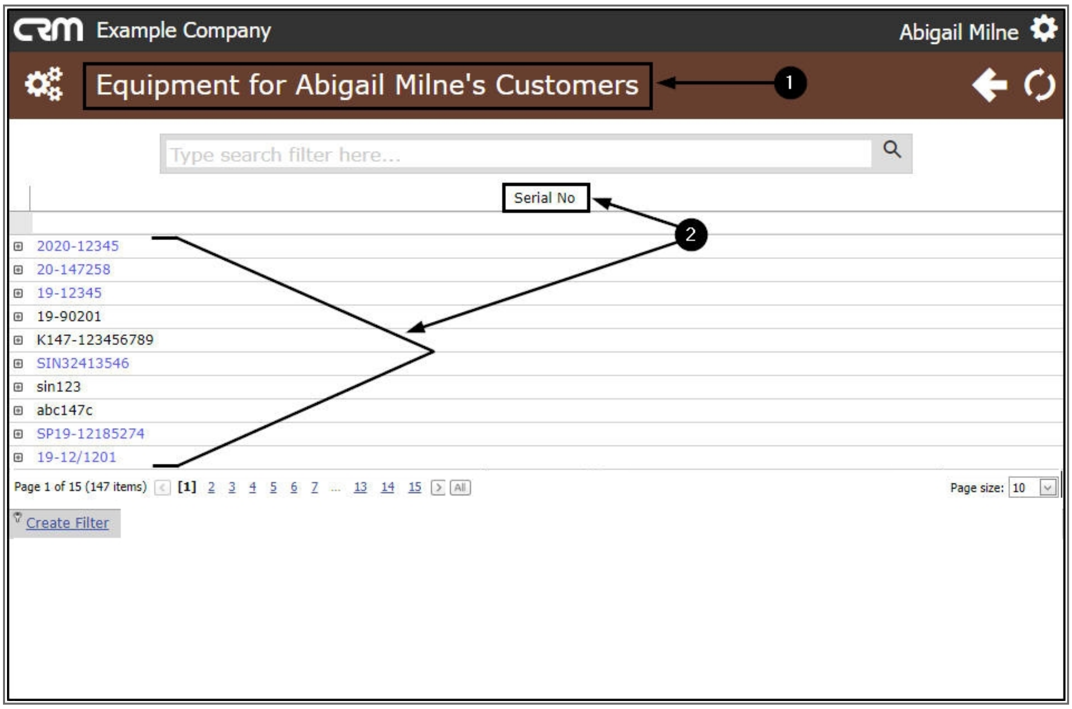
- The **Equipment for** *[Salesman's Name]* **Customers** screen
  - This will list by ***serial number***, all the equipment items that are linked to the salesman's customers.
  - From this screen, you can view:
    - The Contract Details linked to each serialised equipment item, if applicable.
    - The Contract Performance Report for each serialised equipment item.
- The **Equipment for** [*Customer Name*] screen
  - This will list by ***serial number***, all the equipment items that are linked to the selected customer.
  - From this screen, you can also view:
    - The ***Model No.***, ***Description***, and ***contract details*** of each serialised equipment item, if applicable.
    - The Contract Performance Report for each serialised equipment item, if applicable. (Access to this report will depend on your security rights.)

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

THE 'EQUIPMENT FOR [SALESMAN'S NAME] CUSTOMERS' SCREEN

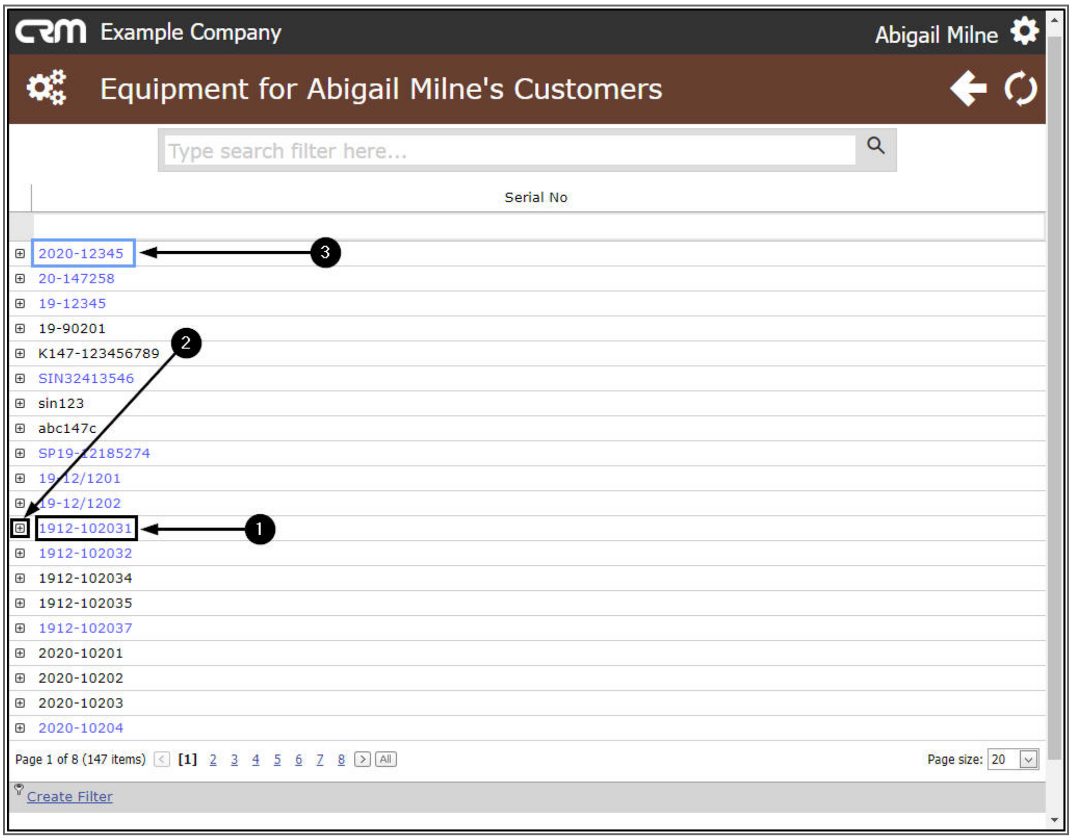
1. In the ***Homepage***,
2. Click on the ***Equipment*** tile.
3. You will note a ***number*** in the top right corner of this tile - this indicates the ***total amount*** of serialised equipment items linked to the salesman's customers.

1. The ***Equipment for****[Salesman's Name]****Customers*** page will open.
2. These items are listed by ***Serial No***.

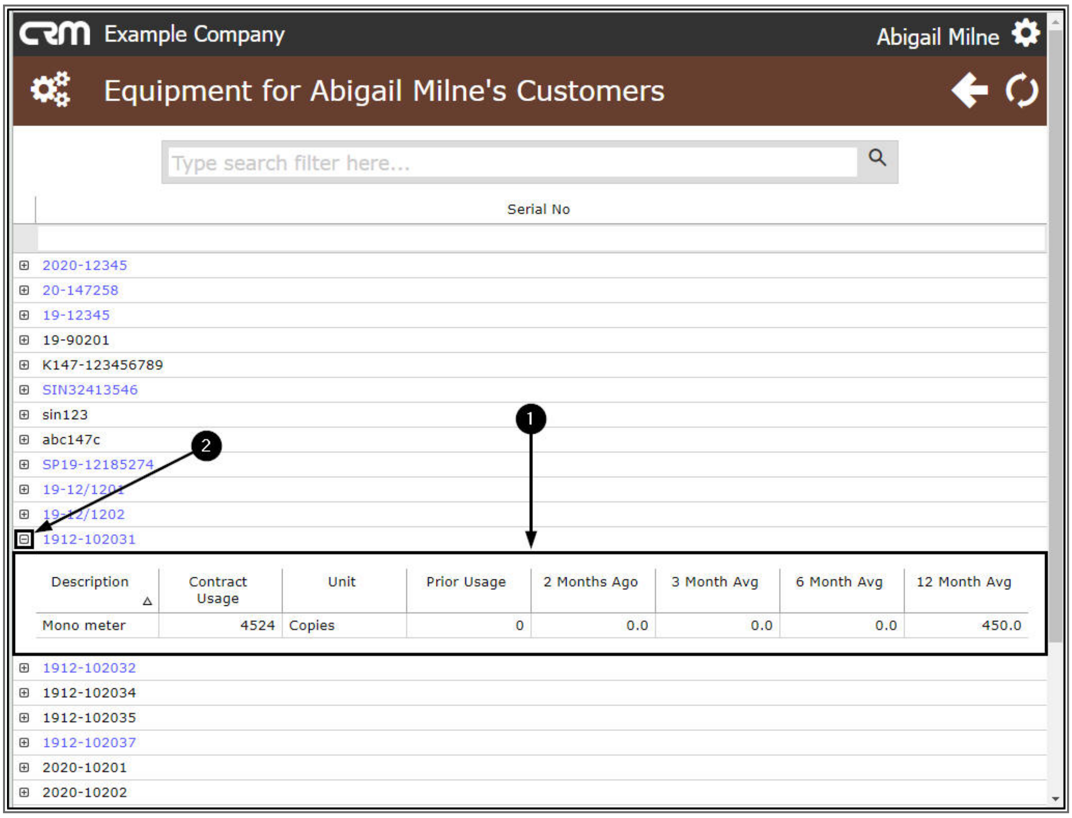


VIEW EQUIPMENT ITEM 'CONTRACT DETAILS'

1. Us the ***scroll bar***, the ***Create Filter*** row or the ***Filter Box*** to search for the specific serial number that you wish to view the contract details of.
2. Click on the ***expand*** icon in front of that selected serial number.
3. Note that only the ***blue***-coloured serial numbers are currently linked to contracts. The ***black*** serial numbers are ***invoiced*** equipment items.

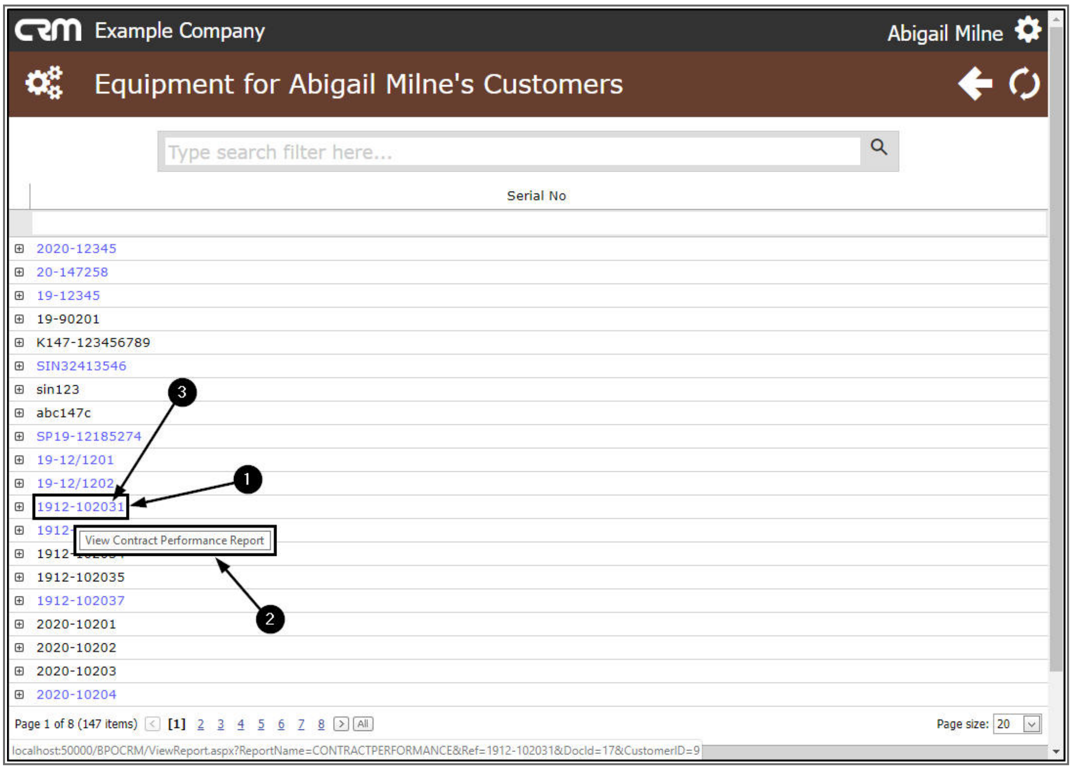


1. A ***sub-grid*** will open containing details of the ***contract*** that is linked to this serialised equipment item.
2. ***Collapse*** the sub-grid when you have finished viewing it.

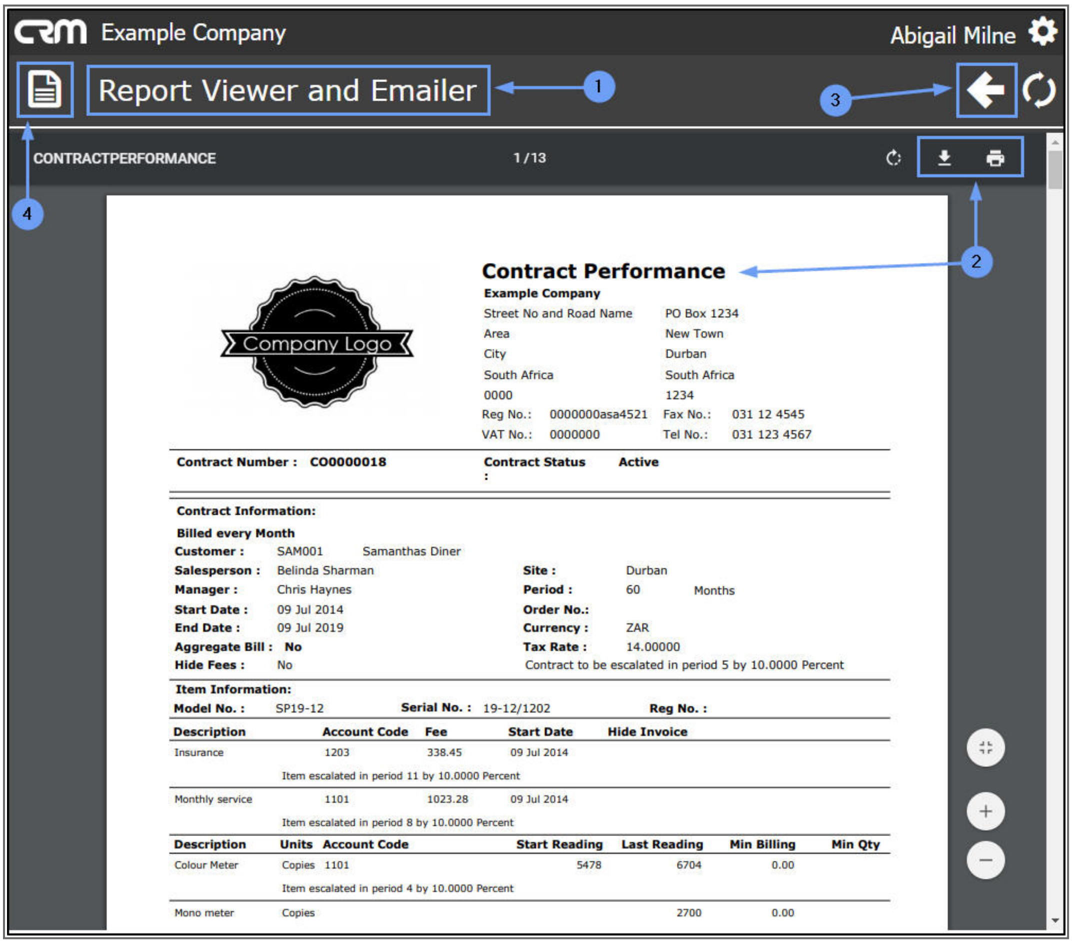


VIEW 'CONTRACT PERFORMANCE REPORT'

1. ***Hover*** over the serial number of the equipment item that you wish to view the Contract Performance Report of.
    - Remember this will be a ***blue***-coloured number.
2. A ***screen tip*** will pop up with the text; ***View Contract Report***.
3. Click anywhere on the serial number.

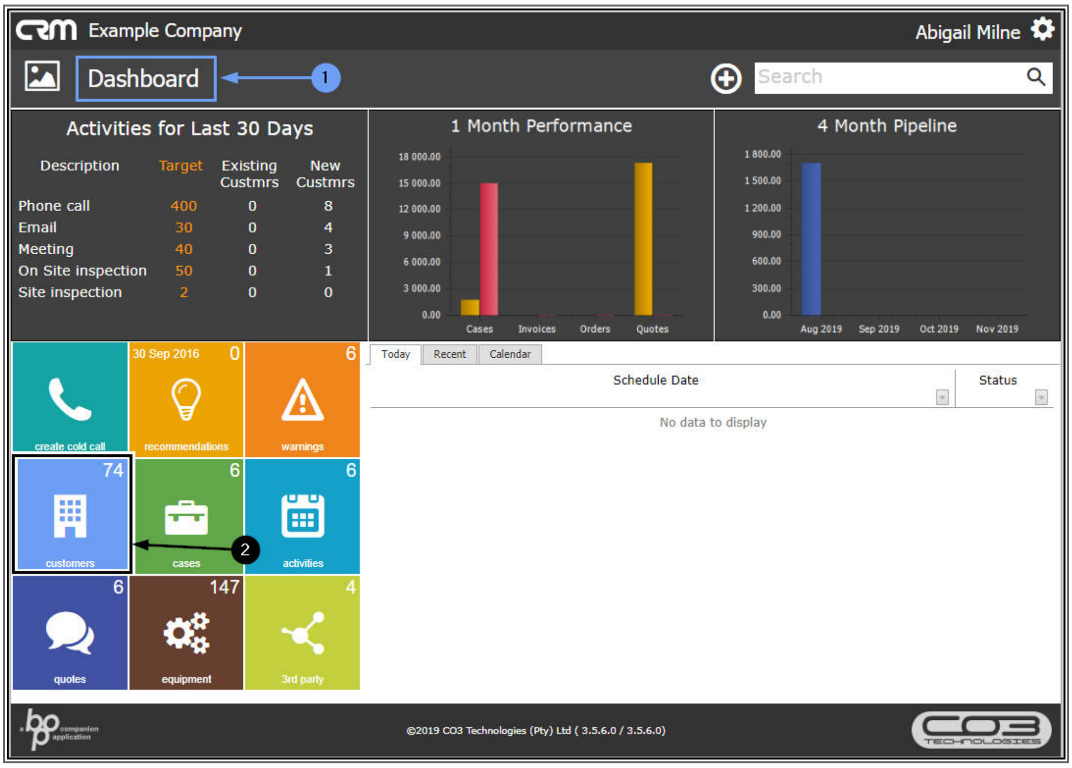


1. The ***Report Viewer and Emailer*** preview screen will be displayed.
2. Here, you can view, download and / or print the ***Contract Performance*** report.
3. *Either*, click on the ***Back*** button to return to the previous page.
4. *Or*, click on the ***Page icon*** in the top left of the page to return to the Homepage .

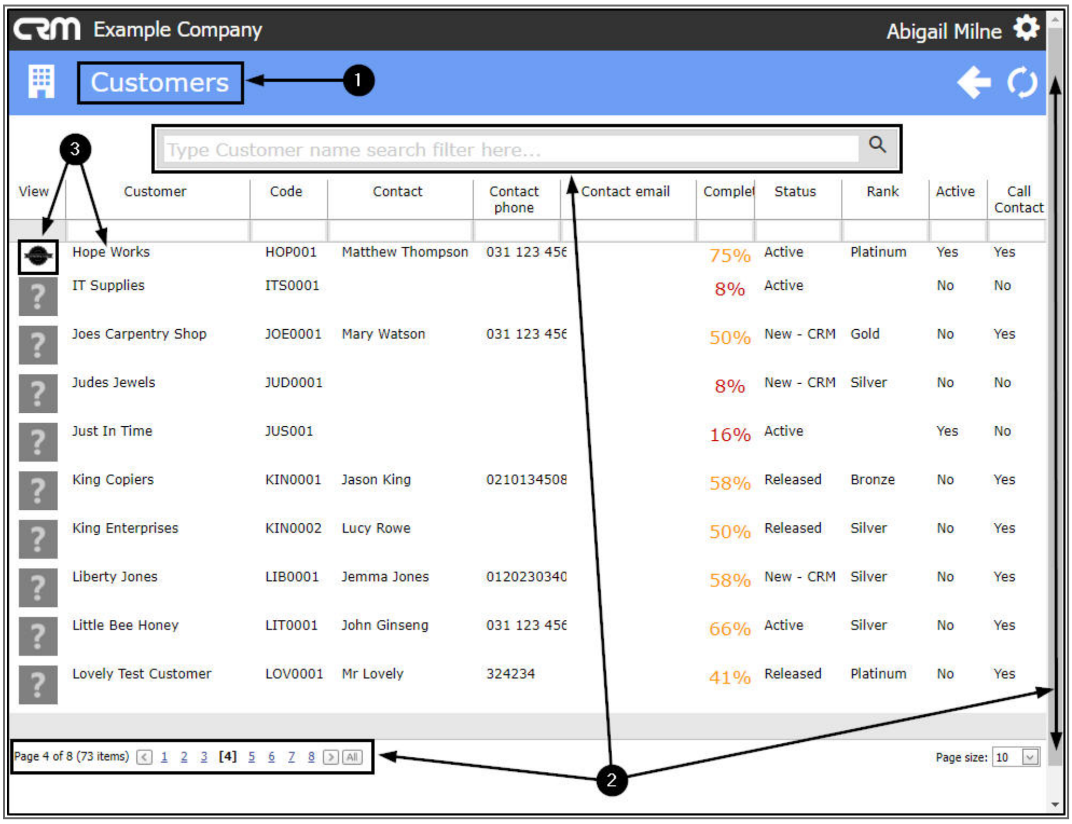


THE 'EQUIPMENT FOR[CUSTOMER NAME]' SCREEN

1. In the ***Homepage***,
2. Click on the ***Customers*** tile.



1. The ***Customers*** page will open.
2. Use the Page Reference field, ***scroll bar*** or Filter Text Box to find the applicable customer.
3. Click in the ***View*** column in the row of the selected customer.
    - In this example, the selected customer is ***Hope Works***.

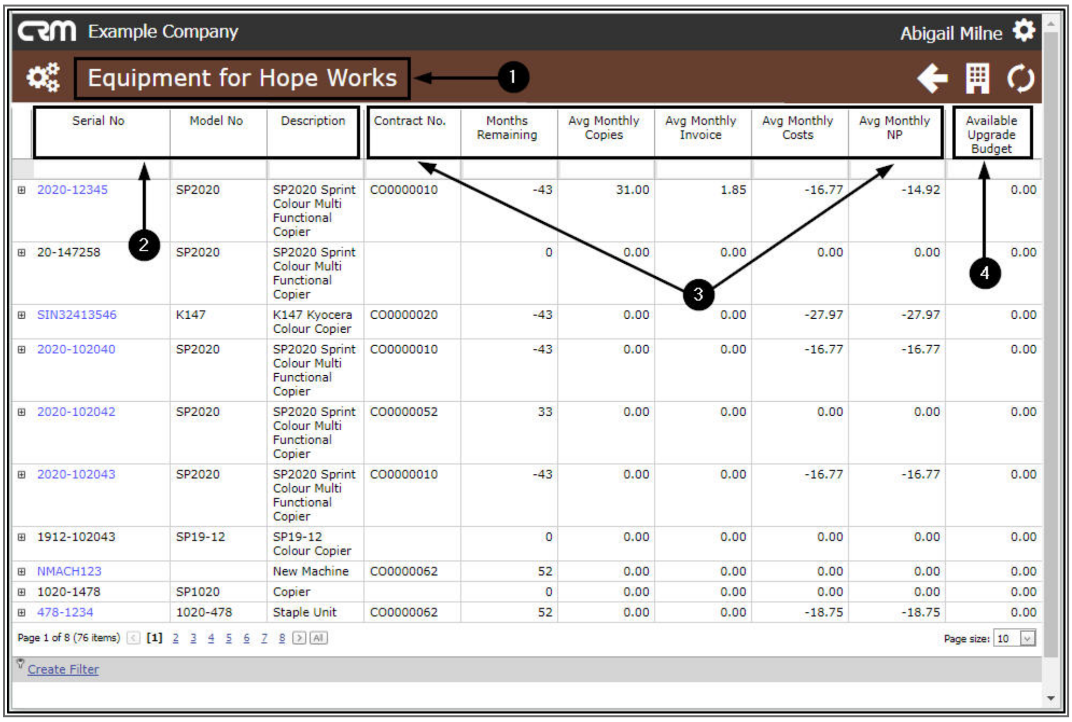


- The selected ***Customer Homepage*** will be displayed.
- Click on the ***Equipment*** tile.

1. The ***Equipment for [*** Customer Name ***]*** page will open.
2. As well as listing the equipment items by ***Serial No***, this page also contains columns for the:
    - **Model No** and
    - **Description** of each item.
3. You can view ***Contract Information*** columns in this page:
    - **Contract No**
    - **Months Remaining**
    - **Avg Monthly Copies**
    - **Avg Monthly Invoice**

- **Avg Monthly Costs**
- **Avg Monthly NP**

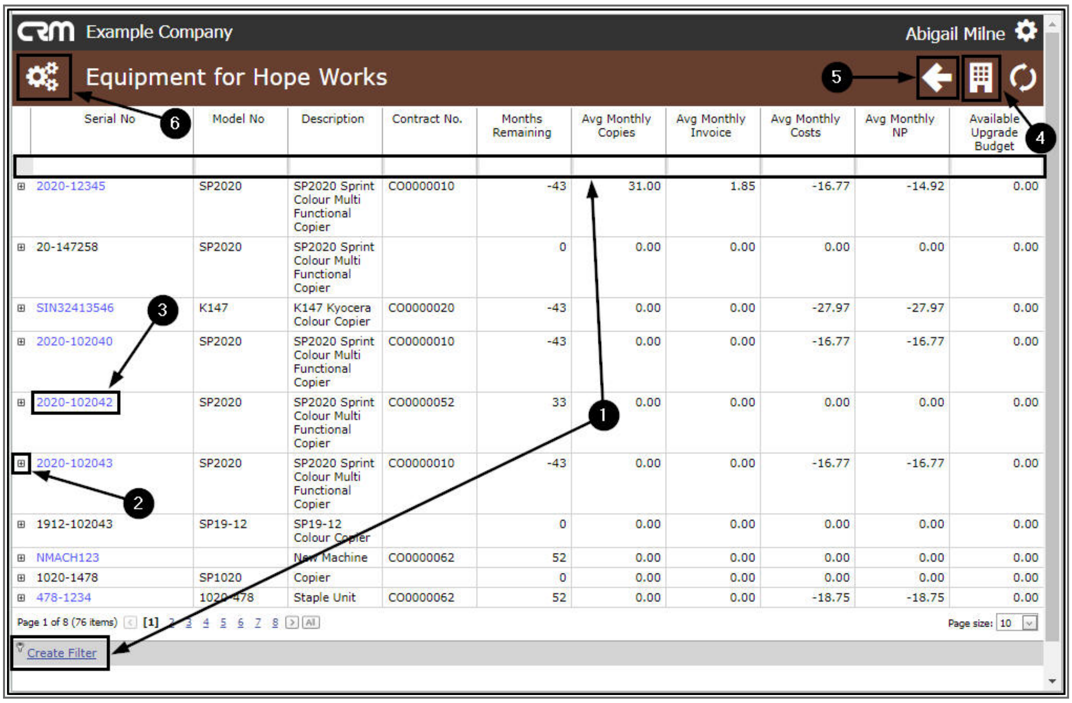
4. You can view the **Available Upgrade Budget** information for each item.



Serial No	Model No	Description	Contract No.	Months Remaining	Avg Monthly Copies	Avg Monthly Invoice	Avg Monthly Costs	Avg Monthly NP	Available Upgrade Budget
2020-12345	SP2020	SP2020 Sprint Colour Multi Functional Copier	CO0000010	-43	31.00	1.85	-16.77	-14.92	0.00
20-147258	SP2020	SP2020 Sprint Colour Multi Functional Copier		0	0.00	0.00	0.00	0.00	0.00
SIN32413546	K147	K147 Kyocera Colour Copier	CO0000020	-43	0.00	0.00	-27.97	-27.97	0.00
2020-102040	SP2020	SP2020 Sprint Colour Multi Functional Copier	CO0000010	-43	0.00	0.00	-16.77	-16.77	0.00
2020-102042	SP2020	SP2020 Sprint Colour Multi Functional Copier	CO0000052	33	0.00	0.00	0.00	0.00	0.00
2020-102043	SP2020	SP2020 Sprint Colour Multi Functional Copier	CO0000010	-43	0.00	0.00	-16.77	-16.77	0.00
1912-102043	SP19-12	SP19-12 Colour Copier		0	0.00	0.00	0.00	0.00	0.00
NMACH123		New Machine	CO0000062	52	0.00	0.00	0.00	0.00	0.00
1020-1478	SP1020	Copier		0	0.00	0.00	0.00	0.00	0.00
478-1234	1020-478	Staple Unit	CO0000062	52	0.00	0.00	-18.75	-18.75	0.00

In this page - you can:

1. Use the Filter Row or the Create Filter functionality to search for specific details.
2. View the serialised equipment Contract details, if applicable, (the blue-coloured serial numbers are linked to contracts).
3. View the Contract Performance Report, if applicable, (the ***blue***-coloured serial numbers are linked to contracts).
4. Click on the ***Customers*** icon to return to the Customer Homepage.
5. Click on the ***Back*** button to return to the previous page.
6. Click on the ***page icon*** on the top left of the page to return to the Homepage.



Example Company
Abigail Milne
Equipment for Hope Works
Serial No
Model No
Description
Contract No.
Months Remaining
Avg Monthly Copies
Avg Monthly Invoice
Avg Monthly Costs
Avg Monthly NP
Available Upgrade Budget
2020-12345 SP2020 SP2020 Sprint Colour Multi Functional Copier C00000010 -43 31.00 1.85 -16.77 -14.92 0.00
20-147258 SP2020 SP2020 Sprint Colour Multi Functional Copier 0 0.00 0.00 0.00 0.00 0.00
SIN32413546 K147 K147 Kyocera Colour Copier C00000020 -43 0.00 0.00 -27.97 -27.97 0.00
2020-102040 SP2020 SP2020 Sprint Colour Multi Functional Copier C00000010 -43 0.00 0.00 -16.77 -16.77 0.00
2020-102042 SP2020 SP2020 Sprint Colour Multi Functional Copier C00000052 33 0.00 0.00 0.00 0.00 0.00
2020-102043 SP2020 SP2020 Sprint Colour Multi Functional Copier C00000010 -43 0.00 0.00 -16.77 -16.77 0.00
1912-102043 SP19-12 SP19-12 Colour Copier 0 0.00 0.00 0.00 0.00 0.00
NMACH123 New Machine C00000062 52 0.00 0.00 0.00 0.00 0.00
1020-1478 SP1020 Copier 0 0.00 0.00 0.00 0.00 0.00
478-1234 1020-478 Staple Unit C00000062 52 0.00 0.00 -18.75 -18.75 0.00
Page 1 of 8 (76 items)
Page size: 10
Create Filter
1
2
3
4
5
6

CRM.002.010