

# CRM CUSTOMERS

## SERVICE CALLS

In CRM, you can view the **Service Call History** for a selected customer. This Service Calls page displays both **Open Calls** and **Calls in the Last 180 Days**.

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

## SELECT CUSTOMER

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

**CRM Example Company** | Abigail Milne

**Dashboard** | Search

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	8
Email	30	0	4
Meeting	40	0	3
On Site inspection	50	0	1
Site inspection	2	0	0

Category	Value
Cases	~15,000.00
Invoices	~1,000.00
Orders	~17,000.00
Quotes	~1,000.00

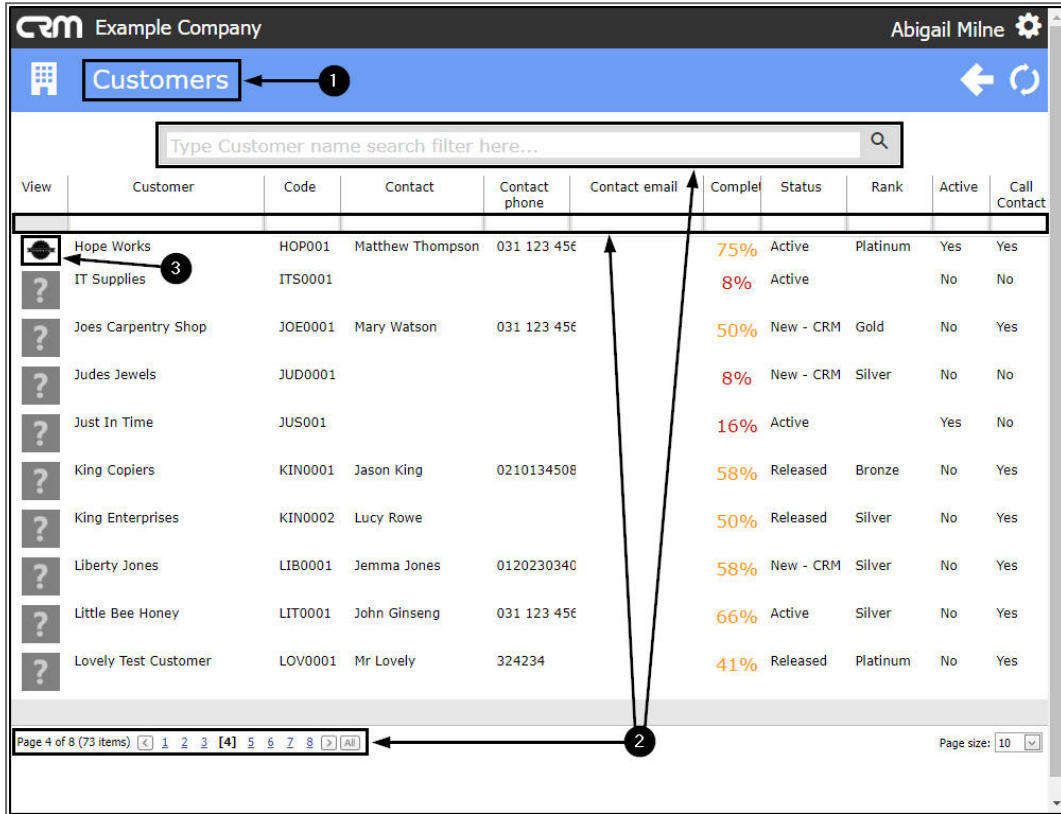
Month	Value
Aug 2019	~1,700.00
Sep 2019	~1,500.00
Oct 2019	~1,200.00
Nov 2019	~1,000.00

**Navigation Tiles:**

- create cold call (30 Sep 2016, 0)
- recommendations (0)
- warnings (6)
- customers (74)
- cases (6) ← **2**
- activities (6)
- quotes (6)
- equipment (147)
- 3rd party (4)

**Footer:** hpo competition application | ©2019 CO3 Technologies (Pty) Ltd (3.5.6.0 / 3.5.6.0) | CO3 TECHNOLOGIES

1. The **Customers** page will open.
2. Use the **Page Reference** field, **Filter Row** or **Filter Text Box** to find the applicable customer.
3. Click on the selected **Customer icon** in the **View** column.



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

The screenshot displays a CRM interface for 'Example Company' with the user 'Abigail Milne'. The main header shows 'Hope Works' with a search bar. Below the header, there are three main sections:

- Activities for Last 30 Days:** A table showing activity counts for different descriptions.
- 1 Month Performance:** A bar chart comparing Cases, Invoices, Orders, and Quotes.
- 4 Month Pipeline:** A bar chart showing revenue over a four-month period.

The central dashboard features 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 'Company Logo' section provides details for 'Hope Works (Pty) Ltd', including VAT No, Registration, Rank, Website, and Phone. A '12 Months Sales History' bar chart shows 'Contract Income' and 'Sales Revenue' from August 2018 to August 2019.

## THE SERVICE CALLS FOR [CUSTOMER NAME] PAGE

1. The *Service Calls for [Customer Name]* page will open.

### VIEW OPEN CALLS

2. The *Open Calls* tab will be at the fore which lists by *Call Reference* No all current/open calls linked to this customer.
3. In this data grid you can view the *details* relating to each call.
4. Click on the *Refresh* button at any time to bring the data up to date (if any changes have been made in BPO2, for example).

CRM Example Company Abigail Milne

Service Calls for Hope Works

Open Calls | **Calls in Last 180 Days**

Call Reference	Call Desc	Priority	Contact Name	Contact Tel No	Call Date	Call Time	Close Date	Close Time	Call Status	SLA Hours	SLA Elapsed Hours	SLA On Hold Hours	Serial No	Item Location
⊞ CN0000052	Drum replacement required	2	Mandy Jefferson	031 555 1234	05 Aug 2014	15:02:33	01 Jan 1900	00:00:00	N	0.00	11706.95	0.00	abc147a	
⊞ CN0000083	CO 1234	2	Mandy Jefferson	031 555 1234	11 Nov 2014	15:36:13	01 Jan 1900	00:00:00	N	0.00	11076.38	0.00		
⊞ CN0000095	Prints arent stapled	2	Mandy Jefferson	031 555 1234	08 Jan 2015	15:23:45	01 Jan 1900	00:00:00	N	0.00	10707.60	0.00	20-852963	
⊞ CN0000096	Test locations against calls - work order print	2	Mandy Jefferson	031 555 1234	13 Jan 2015	11:37:04	01 Jan 1900	00:00:00	N	0.00	10684.37	0.00		Main
⊞ CN0000096	Test locations against calls - work order print	2	Mandy Jefferson	031 555 1234	13 Jan 2015	11:37:04	01 Jan 1900	00:00:00	N	0.00	10684.37	0.00		Main
⊞ CN0000103	Contract Closure - CO0000004	2	Mandy Jefferson	031 555 1234	02 Feb 2015	13:34:12	01 Jan 1900	00:00:00	N	0.00	10556.42	0.00		
⊞ CN0000118	Setup required	2	Mandy Jefferson	031 555 1234	26 Feb 2015	12:25:20	01 Jan 1900	00:00:00	N	0.00	10395.57	0.00	20-852963	
⊞ CN0000121	check levels	2	Mandy Jefferson	031 555 1234	26 Feb 2015	14:11:44	01 Jan 1900	00:00:00	N	0.00	10393.80	0.00	20-852963	
⊞ CN0000149	test	2	Mandy Jefferson	031 555 1234	03 Sep 2015	16:36:45	01 Jan 1900	00:00:00	N	0.00	9176.38	0.00		
⊞ CN0000150	test	2	Mandy Jefferson	031 555 1234	04 Sep 2015	09:28:16	01 Jan 1900	00:00:00	N	0.00	9183.52	0.00		

Page 1 of 22 (213 items) [1] 2 3 4 5 6 7 ... 20 21 22 [All] Page size: 10

[Create Filter](#)

## VIEW CALLS IN LAST 180 DAYS

1. Click on the **Calls in Last 180 Days** tab. This will list the calls linked to this customer over the last **6** months.
2. In this data grid you can also view the **details** relating to each call.

## VIEW LINKED WORK ORDER CODE AND WORK ORDER DESCRIPTION

You can view the work order(s) linked to a call in both the **Open Calls** data grid and the **Calls in Last 180 Days** data grid. In this example, we will navigate from the Calls in Last 180 Days data grid.

- Click on the **expand** button in front of a **Call Reference No.**
  - In this example, Call Reference No.: **CN0000601** is selected.

Call Reference	Call Desc	Priority	Contact Name	Contact Tel No	Call Date	Call Time	Close Date	Close Time	Call Status	SLA Hours	SLA Elapsed Hours	SLA On Hold Hours	Serial No	Item Location
☐ CN0000592	123456	2		031 123 4567	02 Apr 2019	10:00:48	01 Jan 1900	00:00:00	N	0.00	7.00	0.00	Bothas Hill	Accounts Contact
☐ CN0000594	Service	3	2020-43256	031 123 45671	11 Apr 2019	15:14:03	01 Jan 1900	00:00:00	N	0.00	1.77	0.00		Jane. Alrich.
☐ PCN0000029	Maintenance call out	3	2020-43256	031 123 45671	12 Apr 2019	10:35:02	01 Jan 1900	00:00:00	P	0.00	6.42	0.00		Jane. Alrich.
☐ CN0000596	Toner required	3	2020-12345	031 123 45671	30 Apr 2019	11:53:33	01 Jan 1900	00:00:00	N	8.00	5.12	0.00		Jane. Alrich.
☐ CN0000600	TT010 - Daily, Colour 1000 - Call per WO	2	1020-10101	031 123 45671	31 May 2019	11:01:10	01 Jan 1900	00:00:00	N	8.00	5.98	0.00		Jane. Alrich.
☐ <b>CN0000601</b>	Tier - Commercial Tier Test	2	TIER123	031 123 45671	31 May 2019	11:01:10	01 Jan 1900	00:00:00	F	0.00	5.98	0.00		Jane. Alrich.
☐ CN0000602	Tier - Commercial Tier Test	2	TIER123	031 123 45671	31 May 2019	11:01:10	01 Jan 1900	00:00:00	N	0.00	5.98	0.00		Jane. Alrich.
☐ CN0000603	Tier - Commercial Tier Test	2	TIER123	031 123 45671	31 May 2019	11:01:10	01 Jan 1900	00:00:00	N	0.00	5.98	0.00		Jane. Alrich.
☐ CN0000604	Tier - Commercial Tier Test	2	TIER123	031 123 45671	31 May 2019	11:01:10	01 Jan 1900	00:00:00	N	0.00	5.98	0.00		Jane. Alrich.
☐ CN0000605	Tier - Commercial Tier Test	2	TIER123	031 123 45671	31 May 2019	11:01:10	01 Jan 1900	00:00:00	N	0.00	5.98	0.00		Jane. Alrich.

- A Work Order **sub grid** will be expanded.
- Here you can view the **WO Code** and **WO Description** linked to the selected call.

## VIEW/DOWNLOAD/PRINT THE WORK ORDER REPORT

- Click on the **WO Code**.

Service Calls for Hope Works												Hours	Hold Hours		
⊞	CN0000592	123456	2		031 123 4567	02 Apr 2019	10:00:48	01 Jan 1900	00:00:00	N	0.00	7.00	0.00	Bothas Hill	Accounts Contact
⊞	CN0000594	Service	3	2020-43256	031 123 45671	11 Apr 2019	15:14:03	01 Jan 1900	00:00:00	N	0.00	1.77	0.00		Jane. Alrich.
⊞	PCN0000029	Maintenance call out	3	2020-43256	031 123 45671	12 Apr 2019	10:35:02	01 Jan 1900	00:00:00	P	0.00	6.42	0.00		Jane. Alrich.
⊞	CN0000596	Toner required	3	2020-12345	031 123 45671	30 Apr 2019	11:53:33	01 Jan 1900	00:00:00	N	8.00	5.12	0.00		Jane. Alrich.
⊞	CN0000600	TT010 - Dally, Colour 1000 - Call per WO	2	1020-10101	031 123 45671	31 May 2019	11:01:10	01 Jan 1900	00:00:00	N	8.00	5.98	0.00		Jane. Alrich.
⊞	CN0000601	Tier - Commercial Tier Test	2	TIER123	031 123 45671	31 May 2019	11:01:10	01 Jan 1900	00:00:00	F	0.00	5.98	0.00		Jane. Alrich.

WO Code	Description
WO0001773	Tier - Commercial Tier Test

⊞	CN0000602	Tier - Commercial Tier Test	2	TIER123	031 123 45671	31 May 2019	11:01:10	01 Jan 1900	00:00:00	N	0.00	5.98	0.00		Jane. Alrich.
⊞	CN0000603	Tier - Commercial Tier Test	2	TIER123	031 123 45671	31 May 2019	11:01:10	01 Jan 1900	00:00:00	N	0.00	5.98	0.00		Jane. Alrich.
⊞	CN0000604	Tier - Commercial Tier Test	2	TIER123	031 123 45671	31 May 2019	11:01:10	01 Jan 1900	00:00:00	N	0.00	5.98	0.00		Jane. Alrich.
⊞	CN0000605	Tier - Commercial Tier Test	2	TIER123	031 123 45671	31 May 2019	11:01:10	01 Jan 1900	00:00:00	N	0.00	5.98	0.00		Jane. Alrich.

Page 1 of 6 (51 items) [1] 2 3 4 5 6 [All] Page size: 10

[Create Filter](#)

1. The **Report Viewer and Emailer** page will open.
2. Here you can **view, download** and/or **print** the Work Order report.

## EMAIL THE WORK ORDER REPORT

3. Click on **+ Email Document**.

**CRM Example Company** Abigail Milne ⚙️

**Report Viewer and Emailer** ← 1

+ Email Document ← 3

WORKORDER 1 / 1 🔄 ⬇️ 🖨️

**Work 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

---

**WO Barcode**

Customer: Hope Works Tel No.: 031 123 45671  
Code: HOP001 Contact: Jane. Alrich.  
Area: Priority: 2  
**Billable: NO**

---

Shipping Address: Should see this for physical address  
0000  
Machine Location:

Call Date: 31 May 2019 11:01  
Call Ref.: CN0000601  
Serial No.: TIER123  
Model No.: SP1020  
Error Code:  
WO Code: WO0001773  
WO Desc: Tier - Commercial Tier Test

---

Contract No.: C.O.D Inclusions:

**Prior Issues:**

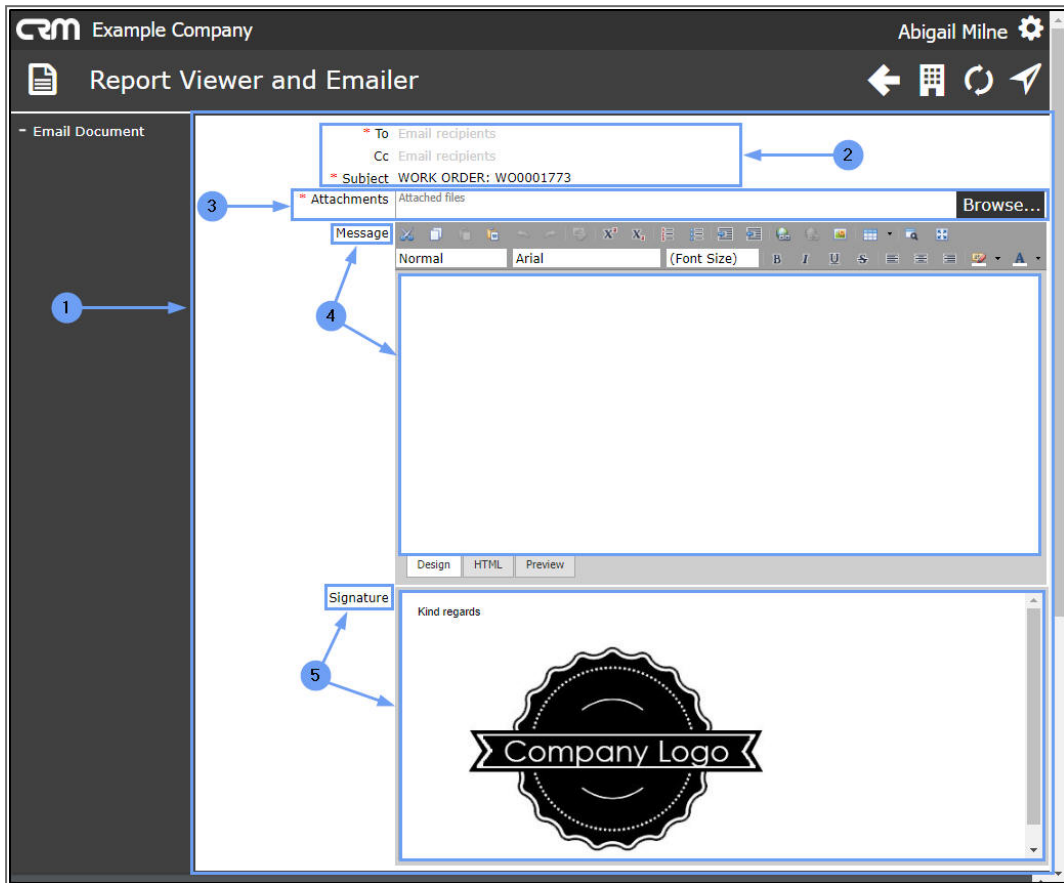
Call Ref.	Call Date	Issue	Solution	Technician
CN0000339	09 Jun 2016	Tier - Commercial Tier Test		Bianca Du Toit
CN0000338	09 Jun 2016	Tier - Commercial Tier Test	This call was auto closed by the BPO AutoClose Service	Bianca Du Toit
CN0000337	09 Jun 2016	Tier - Commercial Tier Test		Belinda Sharman
CN0000336	09 Jun 2016	Tier - Commercial Tier Test		
CN0000335	09 Jun 2016	Tier - Commercial Tier Test		

**WO Events**

Employee	Event	Date / Time	Odometer	Comments
Abigail Milne	Start Work	10 Jun 2019 14:15:19		

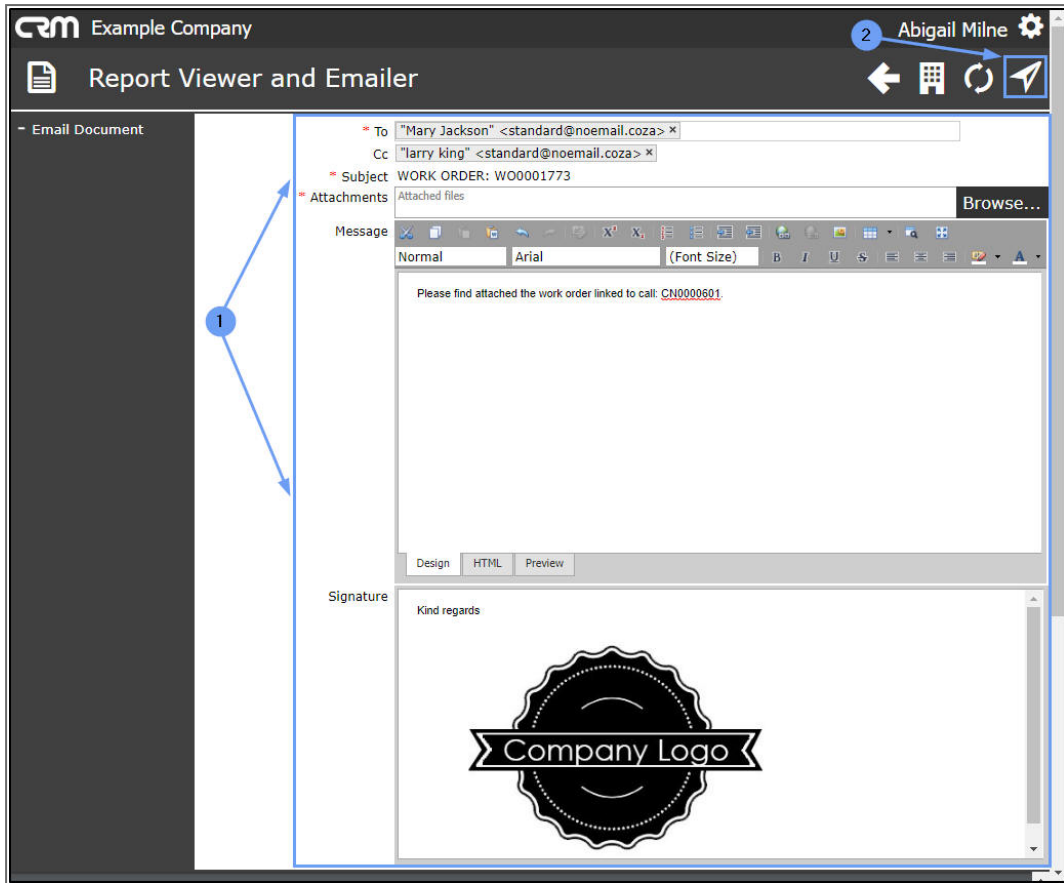
1. The **Email Document** details frame will open.
2. **To:** Click in this text box and either type in the recipient email address or select an address from the drop-down menu.  
**CC:** Click in this text box and either type in the Cc recipient email address or select an address from the drop-down menu.  
**Subject:** This will auto populate with the Work Order number. You can type in additional text if required.
3. **Attachments:** BPO will create a PDF of the order and attach it automatically. (You can attach additional documentation by clicking on **Browse** and selecting a file from the **Open** screen that pops up.)
4. **Message:** Type in the email message in this frame.

5. **Signature:** This will contain either the [default Email Signature](#) or the [customised Email Signature](#) depending on what has been set up in your CRM.



1. When you have added the **email details**,
2. Click on **Send**.





1. The screen will refresh and a message bar will appear at the top of the page stating:

- ***Email saved to queue.***
- Click on this message bar to ***acknowledge*** and ***dismiss*** the message.

Email saved to queue. →

**Report Viewer and Emailer** 1

+ Email Document

WORKORDER 1/1

**Work 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

---

**WO Barcode**

Customer: Hope Works  
Code: HOP001  
Area:   
**Billable: NO**

Tel No.: 031 123 45671  
Contact: Jane. Alrich.  
Priority: 2

---

Shipping Address: Should see this for physical address  
0000

Machine Location: 0000

Contract No.: C.O.D

Call Date: 31 May 2019 11:01  
Call Ref.: CN0000601  
Serial No.: TIER123  
Model No.: SP1020  
Error Code:

WO Code: WO0001773  
WO Desc.: Tier - Commercial Tier Test

Inclusions:

**Prior Issues:**

Call Ref.	Call Date	Issue	Solution	Technician
CN0000339	09 Jun 2016	Tier - Commercial Tier Test		Bianca Du Toit
CN0000338	09 Jun 2016	Tier - Commercial Tier Test	This call was auto closed by the BPO AutoClose Service	Bianca Du Toit
CN0000337	09 Jun 2016	Tier - Commercial Tier Test		Belinda Sharman
CN0000336	09 Jun 2016	Tier - Commercial Tier Test		
CN0000325	09 Jun 2016	Tier - Commercial Tier Test		

**WO Events**

Employee	Event	Date / Time	Odometer	Comments
Abigail Milne	Start Work	10 Jun 2019 14:15:19		

**Technician Name and Comments:** Bianca Du Toit

---

Part Description	Part	Meter 1	Meter 2

You can now decide to:

1. *Either*, click on the **Customers icon** to return to the Customers Dashboard (Customers Home page).
2. *Or*, click on the **Page icon** to return to the Dashboard (Home page).
3. *Or*, click on the **Back** to return to the previous page.
  - For the purpose of this manual, the **Back** button is selected to return you to the **Service Calls for [Customer Name]** page.

**Work 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

**WO Barcode**  
Customer: Hope Works Tel No.: 031 123 45671  
Code: HOP001 Contact: Jane. Alrich.  
Area: Priority: 2  
Billable: NO

Shipping Address: Should see this for physical address  
Call Date: 31 May 2019 11:01  
Call Ref.: CN0000601  
Serial No.: TIER123  
Model No.: SP1020  
Error Code:  
Machine Location: 0000 WO Code: WO0001773  
WO Desc: Tier - Commercial Tier Test  
Contract No.: C.O.D. Inclusions:

**Prior Issues:**

Call Ref.	Call Date	Issue	Solution	Technician
CN0000339	09 Jun 2016	Tier - Commercial Tier Test		Bianca Du Toit
CN0000338	09 Jun 2016	Tier - Commercial Tier Test	This call was auto closed by the BPO AutoClose Service	Bianca Du Toit
CN0000337	09 Jun 2016	Tier - Commercial Tier Test		Belinda Sharman
CN0000336	09 Jun 2016	Tier - Commercial Tier Test		
CN0000335	09 Jun 2016	Tier - Commercial Tier Test		

**WO Events**

Employee	Event	Date / Time	Odometer	Comments
Abigail Milne	Start Work	10 Jun 2019 14:15:19		

## SEARCH FOR A SPECIFIC CALL NO.

In the *Service Calls for [Customer Name]* page, to search for a specific call, start by selecting the data grid from which to begin the search.

1. In this example, we are searching from the *Open Calls* data grid.
2. From here you can use the [Filter Row](#) or the
3. [Create Filter](#) function to search for the applicable call no.

CRM Example Company Abigail Milne

Service Calls for Hope Works

Open Calls | Calls in Last 180 Days

Call Reference	Call Desc	Priority	Contact Name	Contact Tel No	Call Date	Call Time	Close Date	Close Time	Call Status	SLA Hours	SLA Elapsed Hours	SLA On Hold Hours	Serial No	Item Location
⊞ CN0000052	Drum replacement required	2	Mandy Jefferson	031 555 1234	05 Aug 2014	15:02:33	01 Jan 1900	00:00:00	N	0.00	11750.18	0.00	abc147a	
⊞ CN0000083	CO 1234	2	Mandy Jefferson	031 555 1234	11 Nov 2014	15:36:13	01 Jan 1900	00:00:00	N	0.00	11119.62	0.00		
⊞ CN0000095	Prints aren't stapled	2	Mandy Jefferson	031 555 1234	08 Jan 2015	15:23:45	01 Jan 1900	00:00:00	N	0.00	10750.83	0.00	20-852963	
⊞ CN0000096	Test locations against calls - work order print	2	Mandy Jefferson	031 555 1234	13 Jan 2015	11:37:04	01 Jan 1900	00:00:00	N	0.00	10727.60	0.00		Main
⊞ CN0000096	Test locations against calls - work order print	2	Mandy Jefferson	031 555 1234	13 Jan 2015	11:37:04	01 Jan 1900	00:00:00	N	0.00	10727.60	0.00		Main
⊞ CN0000103	Contract Closure - CO0000004	2	Mandy Jefferson	031 555 1234	02 Feb 2015	13:34:12	01 Jan 1900	00:00:00	N	0.00	10599.65	0.00		
⊞ CN0000118	Setup required	2	Mandy Jefferson	031 555 1234	26 Feb 2015	12:25:20	01 Jan 1900	00:00:00	N	0.00	10438.80	0.00	20-852963	
⊞ CN0000121	check levels	2	Mandy Jefferson	031 555 1234	26 Feb 2015	14:11:44	01 Jan 1900	00:00:00	N	0.00	10437.03	0.00	20-852963	
⊞ CN0000149	test	2	Mandy Jefferson	031 555 1234	03 Sep 2015	16:36:45	01 Jan 1900	00:00:00	N	0.00	9219.62	0.00		
⊞ CN0000150	test	2	Mandy Jefferson	031 555 1234	04 Sep 2015	09:28:16	01 Jan 1900	00:00:00	N	0.00	9226.75	0.00		

Page 1 of 22 (213 items) | [1] 2 3 4 5 6 7 ... 20 21 22 [X] [AM] Page size: 10

Create Filter

## EXIT THE SERVICE CALLS FOR [CUSTOMER NAME] PAGE

1. Either, click on the **Customer** icon to return to the Customer Dashboard (Customer Home page)
2. Or, click on the **Back** button to return to the previous page.
3. Or, click on the **Page icon** in the top left of the page to return to the Dashboard (Home page).

CRM Example Company Abigail Milne

Service Calls for Hope Works

Open Calls | Calls in Last 180 Days

Call Reference	Call Desc	Priority	Contact Name	Contact Tel No	Call Date	Call Time	Close Date	Close Time	Call Status	SLA Hours	SLA Elapsed Hours	SLA On Hold Hours	Serial No	Item Location
⊞ CN0000052	Drum replacement required	2	Mandy Jefferson	031 555 1234	05 Aug 2014	15:02:33	01 Jan 1900	00:00:00	N	0.00	11750.18	0.00	abc147a	
⊞ CN0000083	CO 1234	2	Mandy Jefferson	031 555 1234	11 Nov 2014	15:36:13	01 Jan 1900	00:00:00	N	0.00	11119.62	0.00		
⊞ CN0000095	Prints arent stapled	2	Mandy Jefferson	031 555 1234	08 Jan 2015	15:23:45	01 Jan 1900	00:00:00	N	0.00	10750.83	0.00	20-852963	
⊞ CN0000096	Test locations against calls - work order print	2	Mandy Jefferson	031 555 1234	13 Jan 2015	11:37:04	01 Jan 1900	00:00:00	N	0.00	10727.60	0.00		Main
⊞ CN0000096	Test locations against calls - work order print	2	Mandy Jefferson	031 555 1234	13 Jan 2015	11:37:04	01 Jan 1900	00:00:00	N	0.00	10727.60	0.00		Main
⊞ CN0000103	Contract Closure - CO0000004	2	Mandy Jefferson	031 555 1234	02 Feb 2015	13:34:12	01 Jan 1900	00:00:00	N	0.00	10599.65	0.00		
⊞ CN0000118	Setup required	2	Mandy Jefferson	031 555 1234	26 Feb 2015	12:25:20	01 Jan 1900	00:00:00	N	0.00	10438.80	0.00	20-852963	
⊞ CN0000121	check levels	2	Mandy Jefferson	031 555 1234	26 Feb 2015	14:11:44	01 Jan 1900	00:00:00	N	0.00	10437.03	0.00	20-852963	
⊞ CN0000149	test	2	Mandy Jefferson	031 555 1234	03 Sep 2015	16:36:45	01 Jan 1900	00:00:00	N	0.00	9219.62	0.00		
⊞ CN0000150	test	2	Mandy Jefferson	031 555 1234	04 Sep 2015	09:28:16	01 Jan 1900	00:00:00	N	0.00	9226.75	0.00		

Page 1 of 22 (213 items) [1] 2 3 4 5 6 7 ... 20 21 22 [AM] Page size: 10

Create Filter

CRM.002.012

