

CRM CUSTOMERS

THIRD PARTY

Third Party contains information relating to a customer's current (or expired) contract with a third party provider.

This is helpful for the various reasons including the following:

- To know when to contact your client when their third party contract ends / is due to end.
- To know what your client's current **Item(s)** and **Item(s) Usage** charges are, so that when you create a proposal or quote - you can ensure that it is competitive.

In **CRM**, you can access current Third Party information for a customer in **2** different pages:

1. From the CRM **Homepage**. This will direct you to the ***Third Party for [Salesman's Name] Customers*** page:
 - This will list all the salesman's customers that are linked to Third Party contracts. This process is covered in [CRM Basics: Third Party](#).
2. From the **Customer Homepage**. This will direct you to the ***Third Party for [Customer Name]*** page:
 - This will list all the Third Party contracts linked to the selected customer.

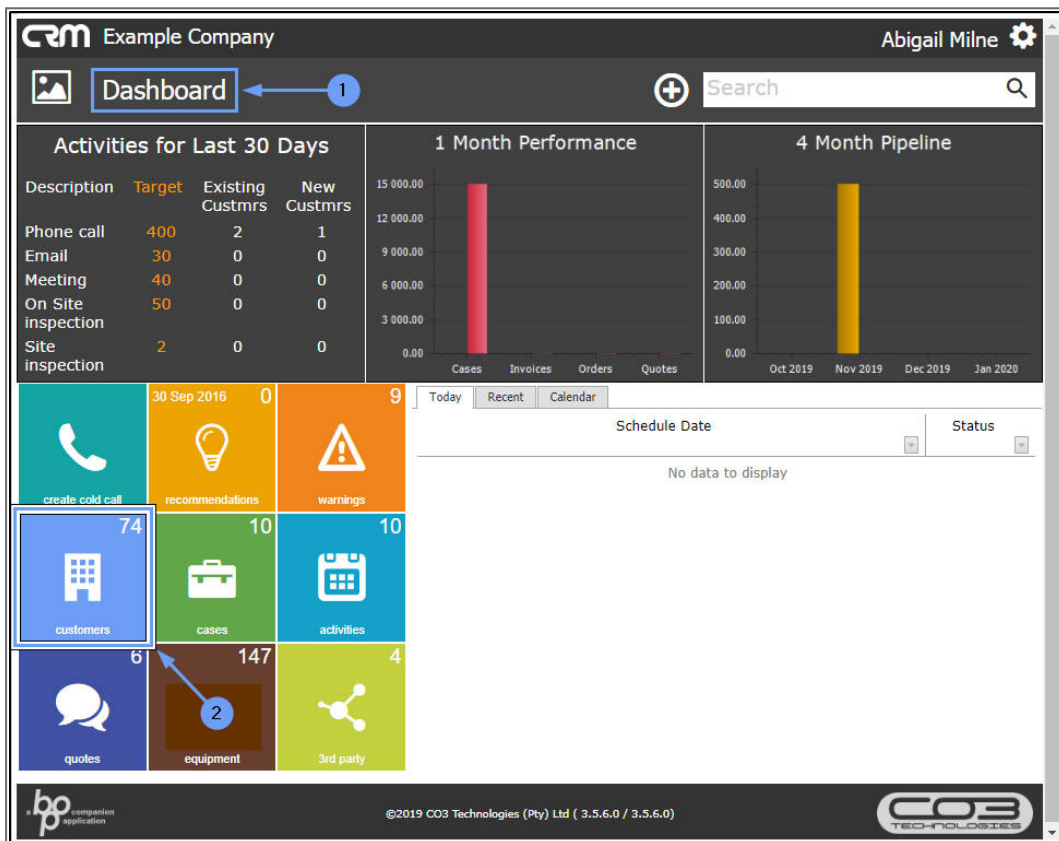
The **2nd** process is covered in *this* manual.

Note: To [Add a new Third Party to a Customer](#), it is quickest to navigate from the Customers (listing) page.

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

ACCESS CURRENT THIRD PARTY INFORMATION FROM THIRD PARTY FOR [CUSTOMER NAME] PAGE

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



1. The *Customers* page will open.
2. Click on the selected *Customer Logo* in the *View* column.

CRM Example Company Abigail Milne

Customers ← ⌂ ↻

Type Customer name search filter here...

View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
	Hope Works	HOP001	Duncan McCreddie	098 765 432	d.mccreddie@noem	91%	Active	Platinum	Yes	Yes
	IT Supplies	ITS0001				8%	Active		No	No
	Joes Carpentry Shop	JOE0001	Mary Watson	031 123 456		50%	New - CRM	Gold	No	Yes
	Judes Jewels	JUD0001				8%	New - CRM	Silver	No	No
	Just In Time	JUS001				16%	Active		Yes	No
	King Copiers	KIN0001	Jason King	0210134508		58%	Released	Bronze	No	Yes
	King Enterprises	KIN0002	Lucy Rowe			50%	Released	Silver	No	Yes
	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	New - CRM	Silver	No	Yes
	Little Bee Honey	LIT0001	John Ginseng	031 123 456		66%	Active	Silver	No	Yes
	Lovely Test Customer	LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes

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1. The selected **Customer Home page** will open.
2. Click on the **Third Party** tile.

The screenshot shows the CRM interface for 'Example Company' with user 'Abigail Milne'. The main view is for customer 'Hope Works - HOP001'. The left sidebar contains various action buttons like 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The main content area displays the company's trading name, registered name, VAT number, registration number, rank, website, and phone number. A 12-month sales history chart shows 'Contract Income' (yellow) and 'Sales Revenue' (blue) from January 2018 to January 2019. A tooltip for January 2018 shows 'Contract Income : 0' and 'Sales Revenue : 1843.3333333333333'. The bottom status bar includes the CO3 Technologies logo and version information: '©2019 CO3 Technologies (Pty) Ltd (3.5.6.0 / 3.5.6.0)'.

1. The **Third Party for [Customer]** page will open.
2. Here you can view a list of all the Third Party contracts 'Main' Information linked to this specific customer.
3. Click on the expand icons to Quick View the Third Party Item and Quick View the Third Party Item Usage.
4. You can hover over any of these frames to display the Action buttons:
 - View / Edit
 - Delete

Use these buttons to;

- i. View / Add /Edit the Third Party 'main' information,
- ii. View / Add /Edit the Third Party 'item' information,
- iii. View / Add /Edit the Third Party 'item usage' information,

CRM Example Company Abigail Milne

Save Third Party 1

- Third Party:	Rental Contract No. Rental Contract No. * Third Party Name Third Party Name Start Date 1 Jan 1900 End Date 1 Jan 1900 Payment Frequency Payment Frequency Escalation Percent Escalation Percent Interest Rate Interest Rate Comments Comments
- Item	Item Type Item Type * Make Make Model Model Serial Number Serial number Location Location Description Description Main User Main User Office Desk No Office Desk No Rental Amount Rental Amount Instalment Amount Instalment Amount Escalation Percentage Escalation Percentage Billing Frequency Billing Frequency Finance Party Finance Party Finance Collects Finance Collects Fixed Service Fee Fixed Service Fee Fixed Admin Fee Fixed Admin Fee Fixed Insurance Fixed Insurance Other Fee 1 Other Fee 1 Other Fee 2 Other Fee 2
+ Item Usage	

Save Save + New Third Party Save + New Item Save + New Usage

ADD NEW THIRD PARTY INFORMATION DIRECTLY FROM THE CUSTOMERS (LISTING) PAGE

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

CRM Example Company Abigail Milne

Dashboard 1 + Search

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

1 Month Performance

Category	Value
Cases	15,000.00
Invoices	0.00
Orders	0.00
Quotes	0.00

4 Month Pipeline

Month	Value
Oct 2019	0.00
Nov 2019	500.00
Dec 2019	0.00
Jan 2020	0.00

Widget Grid:

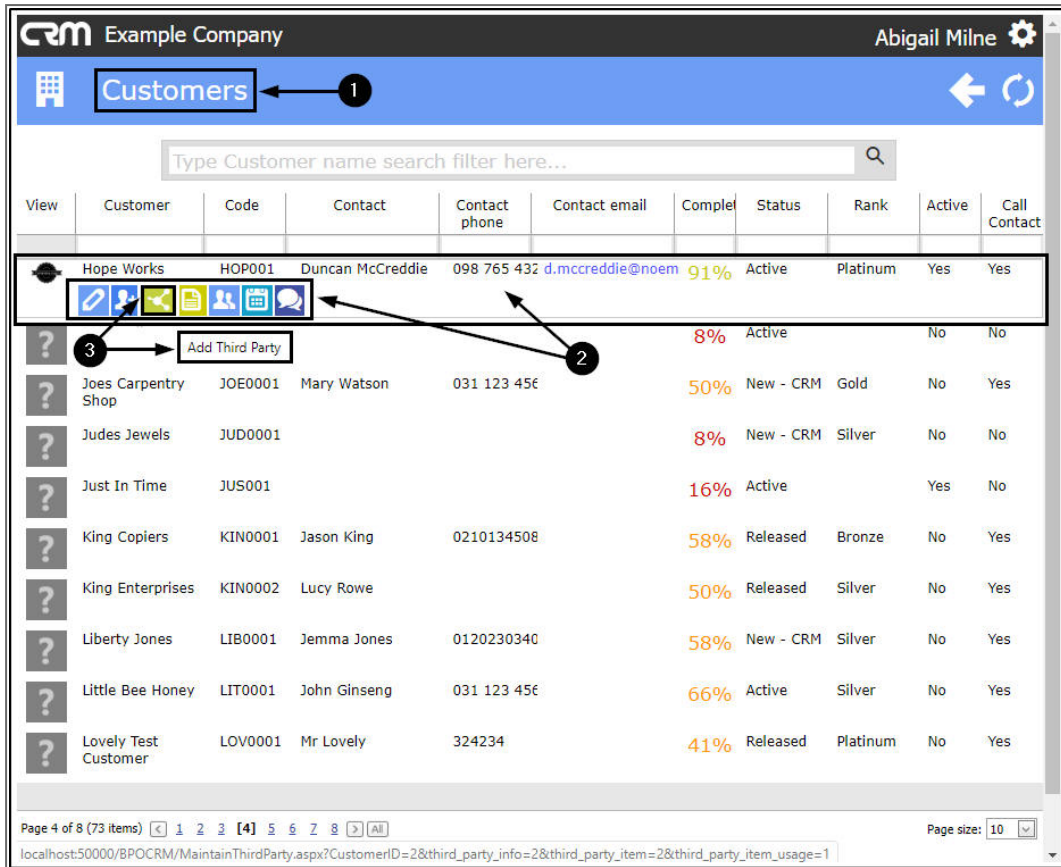
- create cold call (30 Sep 2016, 0)
- recommendations (0)
- warnings (9)
- customers (74) 2
- cases (10)
- activities (10)
- quotes (6)
- equipment (147)
- 3rd party (7)

Table:

Schedule Date	Status
No data to display	

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1. The **Customers** (listing) page will open.
2. Hover over the selected customer until you can view the **Action buttons** panel.
3. Click on the **Add Third Party** button.



1. The **Save Third Party** page will open.
2. You can now add the new Third Party Main Information, Item Information and Item Usage Information as described in the [Basics: Third Party](#) manual.

CRM Example Company Abigail Milne

Save Third Party ← 1 ←

- Third Party:	Rental Contract No. Rental Contract No. * Third Party Name Third Party Name Start Date 1 Jan 1900 End Date 1 Jan 1900 Payment Frequency Payment Frequency Escalation Percent Escalation Percent Interest Rate Interest Rate Comments Comments
- Item	Item Type Item Type * Make Make Model Model Serial Number Serial number Location Location Description Description Main User Main User Office Desk No Office Desk No Rental Amount Rental Amount Instalment Amount Instalment Amount Escalation Percentage Escalation Percentage Billing Frequency Billing Frequency Finance Party Finance Party Finance Collects Finance Collects Fixed Service Fee Fixed Service Fee Fixed Admin Fee Fixed Admin Fee Fixed Insurance Fixed Insurance Other Fee 1 Other Fee 1 Other Fee 2 Other Fee 2
+ Item Usage	

2

Save **Save + New Third Party** **Save + New Item** **Save + New Usage**

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