

CRM CUSTOMERS

CUSTOMER ACTIONS BUTTONS

You can access and add more customer information to **CRM** using the customer **Action buttons**, available in both the **Customers** listing screen and the **Customer Dashboard** (Customer Home page).

Ribbon Access: Webpage > http://[servername]:[portno]/BPOCRM/User.aspx

NAVIGATE TO THE <u>CUSTOMERS LISTING</u> PAGE:

- 1. In the *Dashboard* (Home page),
- 2. Click on the *Customers* tile.
- 3. **Note:** The number in the top left of the tile indicates how many customers that you are linked to.



CRM Exan	nple Cor	npany										Abigail	Milne	٢
🖾 Das	hboard	」 ←	-1					•	Se	arch				Q
Activities for Last 30 Days			3	1 Month Performance			4 Month Pipeline							
Description Phone call Email Meeting On Site inspection	Target 400 30 40 50	Existing Custmrs 0 0 0 0	New Custmrs 0 0 0 0	15 000.00 12 000.00 9 000.00 6 000.00 3 000.00					0.30 0.40 0.30 0.20 0.10					
Site inspection			0	0.00	Cases	Invoices	Orders	Quotes	0.00	Aug 2019	Sep 2019	Oct 2019	Nov 201	9
create cold call (74) (customers) (custome	30 Sep 201	144ions 6 147 147	A warnings	6 Today	Recent	Calendar	Se	hedule Date	a to displ	ау		×	Status	
a polication				©2019 C	:03 Technolo	ogies (Pty) Lta	l (3.5.6.0 /	3.5.6.0)						

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

VIEW ACTIVE OR RELEASED CUSTOMER ACTION BUTTONS

- 2. *Hover anywhere* in the row of a selected customer.
- 3. You will note that the customer status in this example is *Active*. (Active and Released customers will display the same Action buttons.)



	Type Custor	ner name sea	rch filter here				۹		
View	Customer	2 Code	Contact	Contact Contact email phone	Complet	Status	Rank	Active	Cal Conta
٠	Hope Works	HOP001	Matthew Thompson	031 123 45€	75%	Active	Plathoum	Yes	Yes
?	IT Supplies	ITS0001			8%	Active	3	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 45€	66%	Active	Silver	No	Yes
?	Lovely Test Customer	LOV0001	Mr Lovely	324234	41%	Released	Platinum	No	Yes

- 1. The <u>Active</u> customer **Action** buttons will be displayed:
 - Edit Customer
 - Add Contact
 - Add Third Party
 - Add Note
 - Maintain Customer Salesmen
 - New Activity
 - New Quote



	Company Example Company							Abi	gail Milı	ne 🌻
Ħ	Customers								- 🖪	0
	Type Customer	- search	filter here					۹		
View	Customer	Code	Contact	Contact phone	Contact email	Complet	Status	Rank	Active	Call Contac
٠	Hope Works	HOP001	Matthew Thompson	031 123 456		75%	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 45€		66%	Active	Silver	No	Yes
?	Lovely Test Customer	LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes
age 4 of	58 (73 items) € <u>1</u> 2 3 [4] <u>5</u> <u>6</u> Z <u>8</u> ≥ Al								Page size	: 10 🗸

VIEW <u>NEW-CRM</u> CUSTOMER ACTION BUTTONS

- 1. *Hover anywhere* in the row of a *New CRM* customer.
- 2. With <u>New-CRM</u> customers, the Action buttons displayed will include the Release Customer button.



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Ħ	Customers								- ∎	C)
	Type Customer na	ame search	filter here					٩		
View	Customer	Code	Contact	Contact phone	Contact email	Complet	Status	Rank	Active	Call Conta
•	Hope Works	HOP001	Matthew Thompson	031 123 45€		75%	Active	Platinum	Yes	Yes
?	IT Supplies	ITS0001				8%	Active		No	No
?	Joes Carpentry Shop	JOE0001	Mary Watson	031 123 45€		50%	New - CRM	Gold	No	Yes
?	Judes Jewels	JUD0001	_			8%	New - CRM	Silver	No	No
?	Just In Time	JUS001	0			16%	Active		Yes	No
?	King Copiers	WIN0001	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 <mark>4</mark> 56		66%	Active	Silver	No	Yes
?	Lovely Test Customer	LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes
ige 4 of	8 (73 items) < 1 2 3 [4] 5 6 Z 8 >	[AI]							Page size	: 10 🗸

You can either view and add customer information directly from this *Customers* page or you can navigate to the selected *Customer Dashboard* to view the same buttons.

NAVIGATE TO THE <u>CUSTOMERS DASHBOARD</u> (CUSTOMER HOME PAGE) PAGE:

- 1. In the *Customers* listing page,
- 2. Select a specific customer by clicking on the icon next to that customer name, in the *View* column.
- You will note that the customer selected in this example (Hope Works) is an *Active* customer - this will affect the <u>Action button options</u> that will be available.



Type Custom	er name s	search filter here	B			6	Q		
Customer	Code	Contact	Contact phone	Contact email	Complet		Rank	Active	Cal Conta
Hope Works	HOP001	Matthew Thompson	031 123 456		75%	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
	Customer Cus	Customer Code Hope Works HOP001 IT Supplies ITS0001 Joes Carpentry Shop JOE0001 Judes Jewels JUD0001 Just In Time JUS001 King Copiers KIN0002 Liberty Jones LIB0001	Customer Code Contact Hope Works HOP001 Matthew Thompson IT Supplies ITS0001 Mary Watson Joes Carpentry Shop JOE0001 Mary Watson Judes Jewels JUD0001 JUD0001 Just In Time JUS001 Juston King Copiers KIN0001 Jason King Liberty Jones LIB0001 Jemma Jones Little Bee Honey LIT0001 John Ginseng	Hope Works HOP001 Matthew Thompson 031 123 456 IT Supplies 2 ITS0001 Mary Watson 031 123 456 Joes Carpentry Shop JOE0001 Mary Watson 031 123 456 Judes Jewels JUD0001 Just In Time JUS001 King Copiers KIN0001 Jason King 0210134508 King Enterprises KIN0002 Lucy Rowe Liberty Jones LIB0001 Jemma Jones 0120230340 Little Bee Honey LIT0001 John Ginseng 031 123 456	Customer Code Contact Contact phone Contact email Hope Works HOP001 Matthew Thompson 031 123 45€ IT Supplies ITS0001 Mary Watson 031 123 45€ Joes Carpentry Shop JOE0001 Mary Watson 031 123 45€ Judes Jewels JUD0001 JUD0001 Mary Watson 031 123 45€ Just In Time JUS001 Juson King 0210134508 King Copiers KIN0001 Jason King 0210134508 Liberty Jones LIB0001 Jemma Jones 0120230340 Little Bee Honey LIT0001 John Ginseng 031 123 45€	Customer Code Contact Contact Contact phone Contact email Complet phone Hope Works HOP001 Matthew Thompson 031 123 45€ 75% IT Supplies ITS0001 Mary Watson 031 123 45€ 75% Judes Jewels JUD0001 Mary Watson 031 123 45€ 50% Just In Time JUS001 8% 16% King Copiers KIN0001 Jason King 0210134508 58% Liberty Jones LIB0001 Jemma Jones 0120230340 58% Little Bee Honey LIT0001 John Ginseng 031 123 45€ 66%	Customer Code Contact Contact Contact email Comple Status Hope Works HOP001 Matthew Thompson 031 123 456 75% Active IT Supplies ITS0001 Matthew Thompson 031 123 456 75% Active Joes Carpentry Shop JOE0001 Mary Watson 031 123 456 50% New - CRM Judes Jewels JUD0001 Mary Watson 031 123 456 50% New - CRM Just In Time JUS001 16% Active 8% Released King Copiers KIN0001 Jason King 0210134508 58% Released Liberty Jones LIB0001 Jemma Jones 0120230340 58% New - CRM Little Bee Honey LIT0001 John Ginseng 031 123 456 66% Active	Customer Code Contact Contact Contact Contact Contact Comple Status Rank Hope Works HOP001 Matthew Thompson 031 123 45£ 75% Active Platinum TT Supplies IT TTS0001 Marthew Thompson 031 123 45£ 75% Active Platinum Joes Carpentry Shop JOE0001 Mary Watson 031 123 45£ 50% New - CRM Gold Judes Jewels JUD0001 Mary Watson 031 123 45£ 50% New - CRM Silver Just In Time JUS001 1ason King 0210134508 58% Released Bronze King Copiers KIN0001 Jason King 0210134508 58% Released Silver Liberty Jones LIB0001 Jemma Jones 0120230340 58% New - CRM Silver Little Bee Honey LIT0001 John Ginseng 031 123 45£ 66% Active Silver	Type Customer Code Contact Contact Contact email Comple Status Aank Active Hope Works HOP001 Matthew Thompson 031 123 456 75% Active Platinum Yes TI Supplies T TIS0001 Mary Watson 031 123 456 50% New - CRM Gold No Judes Jewels JUD0001 Mary Watson 031 123 456 50% New - CRM Gold No Judes Jewels JUD0001 Mary Watson 031 123 456 50% New - CRM Silver No Just In Time JUS001 Juson King 0210134508 58% Released Bronze No King Copiers KIN0002 Lucy Rowe 50% Released Silver No Liberty Jones LIB0001 Jemma Jones 0120230340 58% New - CRM Silver No Little Bee Honey LIT0001 John Ginseng 031 123 456 66% Active Silver No

1. The *Customer Dashboard* (Customer Home page) page will open.

Note: If you wish to have more <u>space</u> on this page to view your customer information more clearly, you can change your page *Set*-*tings*.

2. This will *hide* the customer dashboard panel.

Select the 'Hide dashboard panel on customer page' setting

3. Click on the *Settings* icon.



	nple Company e Works	2 3 → 🖸 D → Search Q
Activitie	es for Last 30 Days	1 Month Performance 4 Month Pipeline
Description Phone call Email Meeting On Site inspection Site inspection	Target Existing Custmrs New Custmr 400 0 0 30 0 0 40 0 0 50 0 0 2 0 0	15 000.00 3 000.00 12 000.00 2 500.00 9 000.00 2 500.00 6 000.00 1 500.00 3 000.00 1 500.00 6 000.00 5 00.00 0.00 Cases Invoices 0.00 Cases Invoices 0.00 5ep 2019 Oct 2019 Nov 2019 Dec 2019
create cold call	recommendations	Created: 2014/04/03 1 44: 44 PW Registration 123456789 Rank Platinum Website http://www.hopeworks.co.za Phone 031 123 4567
Quotes	orders invoice	12 Months Sales History
eresti notes		600 300 0 -300 -600
service calls	3rd party Nes	Contract Income Sales Revenue C2019 C03 Technologies (Pty) Ltd (3.5.6.0/ 3.5.6.0)

- 1. The *Setting panel* will be expanded.
- 2. Select the 'Hide dashboard panel on customer page' checkbox.





- 1. As you select the check box,
- 2. The *Dashboard panel* will disappear from the screen.



BPO2_Helpf	File_Progress.xlsx	× 💩 bpo C	RM - Hope Works	× +			- 0	×
$\leftarrow \ \ \rightarrow \ \ G$	(i) localhost:5	0000/BPOCRM/V	iewCustomer.aspx?	CustomerID=2			२ 🕁 🍚	:
CCM Exan	nple Company	r					Abigail Milne	۵
📕 Нор	e Works		ø	28	*		G	
create cold call	recommendations	2 A warnings	settings Options Show items for	salesmen settings	customer ranks	case config	logout	
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			©2019 CO3 Technologi	ies (Pty) Ltd (3.5.6.0 / 3.		- NEVEILLE		

• Click <u>outside</u> of the Settings frame to view the full page <u>without</u> the Dashboard.





VIEW CUSTOMER INFORMATION: ACTION BUTTONS

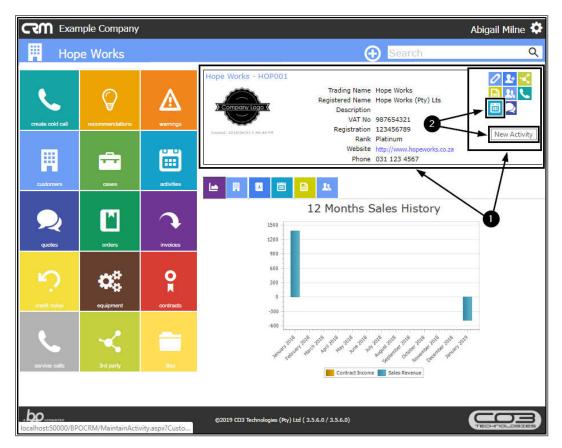
1. Hover anywhere over the Customer Information frame to display the

Action buttons.

- Edit Customer
- Add Contact
- Add Third Party
- Add Note
- Maintain Customer Salesman
- Create Cold Call
- New Activity
- New Quote
- 2. *Hover over* a <u>specific</u> Action button to display that button description:



Note: You can <u>single click</u> on the Customer Information frame to keep the Action buttons <u>consistently displayed</u> in this frame.



EDIT CUSTOMER

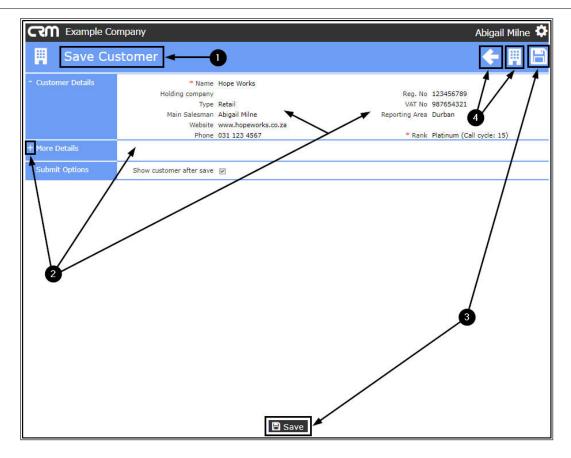
• Click on the *Edit Customer* action button.



CCM Exan	nple Company		Abigail Milne 🌣
📕 Нор	e Works		🕀 Search 🔍
Create cold call	Precommendations	A warnings	Hope Works - HOP001 Trading Name Hope Works Registered Name Hope Works (Pty) Lts Description VAT No 987654321 Registration 123456789
customers	cases	activities	Rank Platinum Website http://www.hopeworks.co.za Phone 031 123 4567
quotes	orders	invoices	12 Months Sales History
Landit notes	equipment	contracts	900
service calls	Sird party		-500 -500
.boccomparties localhost:50000/BP	OCRM/MaintainCon	tact.aspx?Customer	e2019.003 Technologies (2v) Ltd (35.5.0 / 3.5.6.0) ID=2&ContactFields=0&customer-name=0&customer_info=2

- 1. The *Save Customer* page will open.
- In this page you can expand the *More Details* frame and <u>add to</u> or <u>edit</u> the customer details, as required.
- 3. When you are done, you can either *Save* any changes made,
- 4. Or click on either the *Back* icon or the *Customer* icon to return to the previous/Customer page.





ADD CONTACT

- 1. In the *Customer* home page,
- 2. Click on the *Add Contact* action button.



CRM Exam	nple Company		Abigail Milne 🍄
💾 Нор	e Works –	-0	Search Q
create cold call	recommendations	A warnings	Hope Works - HOP001 Trading Name Hope Works Registered Name Hope Works (Pty) Lts Description VAT No 987554321 Registration 123456789
Ħ	÷		Rank Platinum Website http://www.hopeworks.co.za Phone 031 123 4567
quotes	cases	invoices	12 Months Sales History
redit notes	CC Republic	ontracts	900 600 300
service calls	Sind party	ties .	-600
, boo commention localhost:50000/BP	OCRM/MaintainCon	tact.aspx?Customer	(P2019.003 Tedinekoies (P20) ted (335.6.0/3.35.6.0) ID=2&/NewContact=true&customer-name=0&customer_info=1&/ContactFields=2

- 1. The *Save Contact* page will open.
- In this page you can expand the *Customer Details* frame and <u>add to</u> or <u>edit</u> the contact details, as required.
- 3. When you are done, you can either *Save* any changes made,
- 4. Or click on either the *Back* icon or the *Customer* icon to return to the previous/Customer page.



CCM Example Com	ipany			Abigai	il Milne 🍄
👤 Save Cont	tact 🗕 🗍			÷	H B
+ Customer Details				1	11
Contact Info	* First Name * Last Name Preferred Other emails	Title of contact The contact's first name The contact's last name A name the contact prefers Other email addresses separated with semi-colons Any narrative description	Mobile Email Fax	Telephone nurvier Mobile phone nur ber Email addrus Fax number	
Address	1	Address Line 2 Address Line 3 Address Line 4		Post Code Country	
CRM Info			Contact Parent ccepts Sales Calls Send Email		
Submit Options	Show customer after save				
		E Save			

ADD THIRD PARTY

- 1. In the *Customer* home page,
- 2. Click on the *Add Third Party* action button.

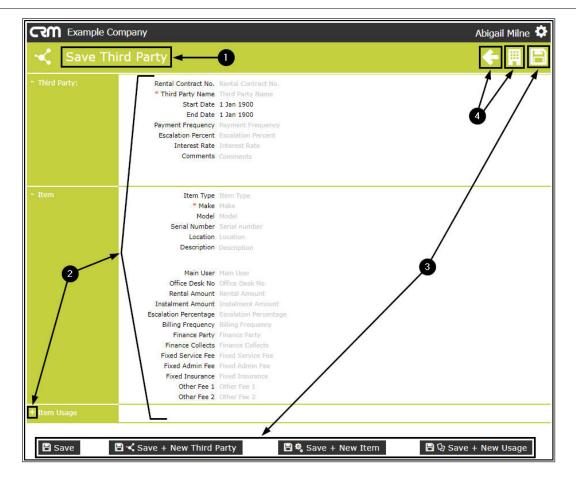




- 1. The *Save Third Party* page will open. This page is for main information regarding the Third Party and the contract details.
- In this page you can expand the *Item Usage* frame and <u>add to</u> or <u>edit</u> the third party details, as required.
- 3. When you are done, you can either select one of the Save options to keep any changes made,
- 4. Or click on either the *Back* icon or the *Customer* icon to return to the previous/Customer page.

Note: You may not have all the third party information, but CRM provides fields for all relevant contract information. Fields with a red asterisk (*) are mandatory.





ADD NOTE

- 1. In the *Customer* home page,
- 2. Click on the *Add Note* action button.



CRM Exan	nple Company		Abigail Milne 🕻
Нор	e Works ◄	-0	🔂 Search 🔍
Create cold call	recommendations	A warnings	Hope Works - HOP001 Trading Name Hope Works Registered Name Hope Works (Pty) Lts Description VAT No 987654321 Registration 123456789
	÷	i	Rank Platinum Website http://www.hopeworks.co.za Phone 031 123 4567
customers	cases	activities	
quotes	orders	invoices	12 Months Sales History
Credit notes	equipment	contracts	1200 900 600 300 0
service calls	Sird party		-300 -600 -600 -600 -600 -600 -600 -600
Localhost:50000/BPOC	CRM/AddNote.aspx?Cu		©2019 CO3 Technologies (Pky) Ltd (3.5.6.0 / 3.5.6.0)

- 1. The *Add Note* page will open.
- 2. Type in a note about the customer in the frame outlined.



CCM Example Con	npany	Abigail Milne 🌣
Add Note]0	🗲 🖪 🖹
Notes	A note about the customer	
	2	
	🖹 Save	

1. When you have typed in the required note,

Either,

2. Click on *Save*, the note will be saved and you will return to the Customer home page.

Or, if you do not wish to save the note:

3. Click on *Back* to return to the previous page,

or,

4. Click on the *Customer icon* to return to the Customer home page,

or,

5. Click on the *CRM logo* to return to the Dashboard (Home page).

Note: You can view this note (and any other notes linked to this customer) by clicking on the Notes Detail tile in the Customer home page.



С Л	Example Com	pany	Abigail Milne 🍄
	Add Note	3—	- 🗲 🖪 🖻
Notes	5	Existing third party contract pending renewal. Client interested in our new pr	roduct range.
			2
		E Save	

MAINTAIN CUSTOMER SALESMEN

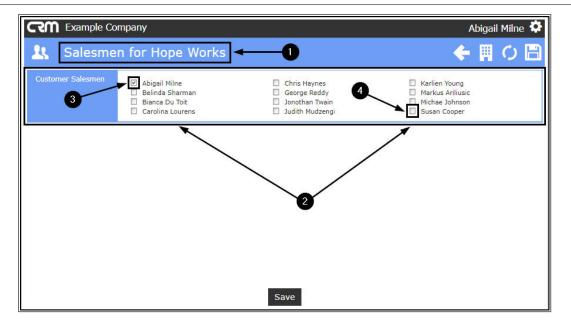
- 1. In the *Customer* home page,
- 2. Click on the *Maintain Customer Salesmen* action button.



CRM Exam	nple Company		Abigail Milne 🍄	
Hope Works -1			Gearch Q	
create cold call	recommendations	A warmings	Hope Works - HOP001 Trading Name Hope Works Registered Name Hope Works (Pty) Lts Description VAT No 987654321 Registration 123456789	
H			Rank Platinum Website http://www.hopeworks.co.za Phone 031 123 4567	
	cases			
quotes	orders	invoices	1500 1200 900 600	
credit notes	equipment	contracts	300 0 -300 -600	
service calls	3rd party		nerest 10 ¹⁰ 1	
bo				

- 1. The *Salesmen for [Customer]* page will open.
- 2. Here you can view a list of <u>all</u> the company salespersons (currently set up on the system).
- 3. The names that have a *ticked* check box in front are currently linked to this customer.
- 4. To link <u>another</u> salesman, *select* the check box in front of that salesman's name.





When you have finished making the required changes,

Either,

1. Click on *Save*, your changes will be saved and you will return to the Customer home page.

Or, if you do not wish to save your changes:

2. Click on *Back* to return to the previous page,

or,

- 3. Click on the *Customer icon* to return to the Customer home page, *or*,
- 4. Click on the *CRM logo* to return to the Dashboard (Home page).

Note: You can view the customer salesmen by clicking on the Salesman Details tile in the Customer home page.



Example Co	mpany	Abigail Milne 🍄	
Salesme	n for Hope Works		₃→▦♫兽
Custome Salesmen	 Abigail Milne Belinda Sharman Bianca Du Toit Carolina Lourens 	☐ Chris Haynes ☐ George Reddy ☐ Jonothan Twain ☐ Judith Mudzengi	 Karlien Young Markus Ariliusic Michae Johnson ✓ Susan Cooper
			2
			0
		Save	

CUSTOMER DETAILS - ACTION ITEMS

CREATE COLD CALL FOR CUSTOMER

This will enable creating a cold call specifically for this customer.

- 1. In the *Customer* Home page,
- 2. Click on the *Create Cold Call for Customer* action button.



CRM Exar	CCM Example Company Abigail Milne 🌣					
📕 Hope Works 🗲 🕕 🚺			ં ૧ વ			
Hop	Contraction of the second seco	A warnings	Hope Works - HOP001 Trading Name Hope Works Registered Name Hope Works (Pty) Lts Description VAT No 987654321 Registration 123456789			
Ħ	÷		Rank Platinum Website http://www.hopeworks.co.za Phone 031 123 4567			
			12 Months Sales History			
quotes	orders		1500 1200 900 600			
eredit notes	equipment	contracts	300 			
service cats Contract Income Seles Revenue						
bo						

- 1. The Create Cold call page will open.
- As this is a cold call created for this existing customer, you will note that the Customer frame will already be populated with this customer's details.
- Complete the remaining cold call details as required. Refer to Creating a Cold Call for more information/directions.

When you have finished making the required changes,

Either,

4. Click on *Save*, your cold call information will be saved and you will return to the Customer home page.

Or, if you do not wish to save your changes:

5. Click on the *Customer icon* to return to the Customer home page,



or,

6. Click on *Back* to return to the previous page,

or,

7. Click on the *CRM logo* to return to the Dashboard (Home page).

Example Com	pany		Abigail Milne 🌣
Create Co	ld Call 🚽	0	6 → 🗲 🗒 🗎
Cu: tomer	* Rank	Hope Works Platinum (15 days) 123456789	Type Retail VAT No 987654321
+ Salesmen			-
Contact		Contact's full name Contact's telephone number	Email Email address
Address	Address Line 1 Address Line 2 Suburb City Province/State Post Code	Address Line 2 Suburb City	
Case 3	Information * Value		
+ Related Customers	Case Type	Type of Case	Source Type The type of source
Next Activity	* Type * Subject	Abigail Milne Type of activity The subject of the activity Additional information relating to the activity	4
+ Activity Attendees			
Schedule		9 Oct 2019 from 15:00 to 16:00 Email SMS 30 minutes before schedul	ed start
Submit Options	Show customer after save		
		Save	

NEW ACTIVITY

This gives you the ability to add a new Case/Activity for the current customer.

- 1. In the *Customer* Home page,
- 2. Click on the *New Activity* action button.





- 1. The *Save Activity* page will open.
- You will note that the *Customer Name* has auto populated in the *Case* frame.
- Fill in the remaining *Case*, *Activity* and *Quote* details, as required.
 Refer to Add/Edit an Activity for more information/directions.

When you have finished making the required changes,

Either,

4. Click on *Save*, the new activity will be saved and you will return to the Customer home page.

Or, if you do not wish to save your changes:

5. Click on the *Customer icon* to return to the Customer home page,

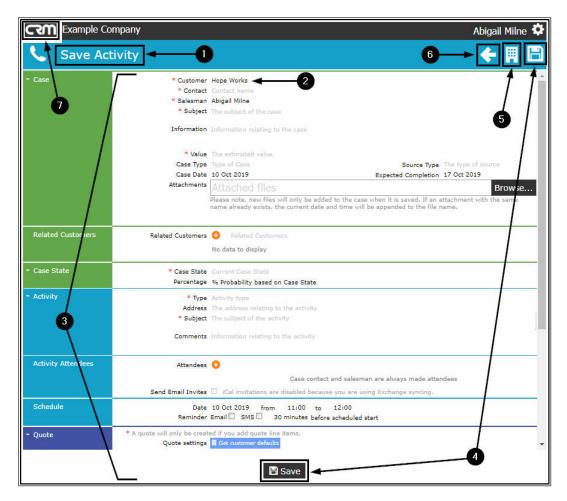
or,



6. Click on *Back* to return to the previous page,

or,

7. Click on the *CRM logo* to return to the Dashboard (Home page).



NEW QUOTE

- 1. In the *Customer* Home page,
- 2. Click on the *New Quote* action button.



CRM Exan	nple Company	8	Abiga	iil Milne 🍄
💾 Нор	e Works <	0	Search	Q
create cold call	recommendations	A warnings	Hope Works - HOP001 Trading Name Hope Works 91% Registered Name Hope Works (Pty) Lts Description VAT No 987654321 Registration 123456789	New Quote
	-	Ë	Created: 2014/04/03 1.45.42 PM Rank Platinum Website http://www.hopeworks.co.za Phone 031 123 4567	New Qubie
customers	cases	activities		
\mathbf{Q}			12 Months Sales History	
quotes	orders	invoices	1500	
redit notes	equipment	contracts	1200 900 600 300	
Service calls	Kan Sird party	fies	-300 -600 -500 -500 -500 -500 -500 -500 -5	
.bo	DOCRM/MaintainC)unte senv?Cueton	Contract Income Seles Revenue	

- 1. The *Save Quote* page will open.
- 2. You will note that some of the details in this page have auto populated.
- 3. Fill in the remaining *Case*, *Quote*, *Quote Financials* and *Quote Items* details, as required. Refer to Add a New Quote for more information/directions.

When you have finished making the required changes,

Either,

4. Click on *Save*, the new activity will be saved and you will return to the Customer home page.

Or, if you do not wish to save your changes:

5. Click on the *Customer icon* to return to the Customer home page,

or,

6. Click on *Back* to return to the previous page,



or,

7. Click on the *CRM logo* to return to the Dashboard (Home page).

Example Company		Abigail Milne 🌣
Save Quote -1		6 →★ 🛱 🗎
+ Case Subj	ect. No case linked	1 1
7 * Custor * Quote Cont Quote Referei 3 Referei	ce REF00000	Date 10 Oct 2019 * Site Select ayout HOP001_SALESQUOTE
	ite 15.00 Comm	Terms Full Payment COD nercial Default
- Quote Items Add it Add tempi Drag a column here	NY 이 이 그는 것 같은 것 같	
	No data to display	
	Save	4

RELEASE CUSTOMER

Note: This *Release* action button is <u>only</u> available for a customer that is in status: New - CRM. Once the customer has moved from New - CRM to *Released*, your accounts department can check/update all financial details and then either Approve or Decline the Customer (this will move the customer to the *Active* status if *Approved* or back to the *New* status if *Declined*).

- 1. In the (New CRM) *Customer* Home page,
- 2. Click on the *Release Customer* action button.



CCM Exar	nple Company		i.	Abigail Milne 🌻
📕 Libe	erty Jones	←_ 0	earch	Q
create cold call	Q recommendations	A warnings	Liberty Jones - LIB0001 Trading Name Liberty Jones 58 Registered Name Liberty Jones Description Household and Clothing Stores Head Office	Release Customer
customers	cases	activities	Cavated 12010/06/23 2137-40 YM VAT No Cavated 12010/06/23 2137-40 YM Vebsite http:// Phone 0120230340	
quates	orders	invoices	Le R I II	
Source of the second se	equipment	oontracts	0.4 0.35 0.2 0.25 0.2 0.15	
service calls	Kan		0.1 0.05 0 50 ⁻⁰ 50 ⁻⁰	16 ¹⁹
Contract Income Sales Revenue				

- 1. The Release Customer page will open.
- 2. A message will display on this page:

• Are you sure you want to release this customer? Click the Back button to cancel.

Either,

3. Click on the *Yes, Release Customer* button or the *Save* button to release this customer.

Or, if you <u>do not</u> wish to release this customer:

- 4. Click on the *Customer icon* to return to the Customer home page, *or*,
- 5. Click on *Back* to return to the previous page,

or,

6. Click on the *CRM logo* to return to the Dashboard (Home page).



		Abigail Milne 🍄
🚆 Release Customer 🗲	-0	5 → 🗲 🛒 🔁
Are you sure you want to release this cu	stomer?	t t
Click the back button to cancel. Liberty Jones - LIB0001		
Trading Name Registered Name Description VAT No Rank Website	Liberty Jones Household and Clothing Stores Head Office Silver	58%
	윈 Yes, Release Customer	

- 1. If you released the customer, you will return to the Customer Home page.
- 2. Note that the Release Customer button is no longer available.

This customer will now need to be **Approved** in BPO in order to become Active.





CRM.002.014

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