

# CRM CUSTOMERS

## CUSTOMER DETAILS TILES

- In the Customer Dashboard (Customer Home page) you can click on customer **Information tiles** which will direct you pages containing information regarding:
  - Customer **Sales History**
  - Customer **Addresses**
  - Customer **Contacts**
  - Customer **Open Activities**
  - Customer **Notes**
  - Customer **Salesmen**

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

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## NAVIGATE TO THE CUSTOMER DASHBOARD

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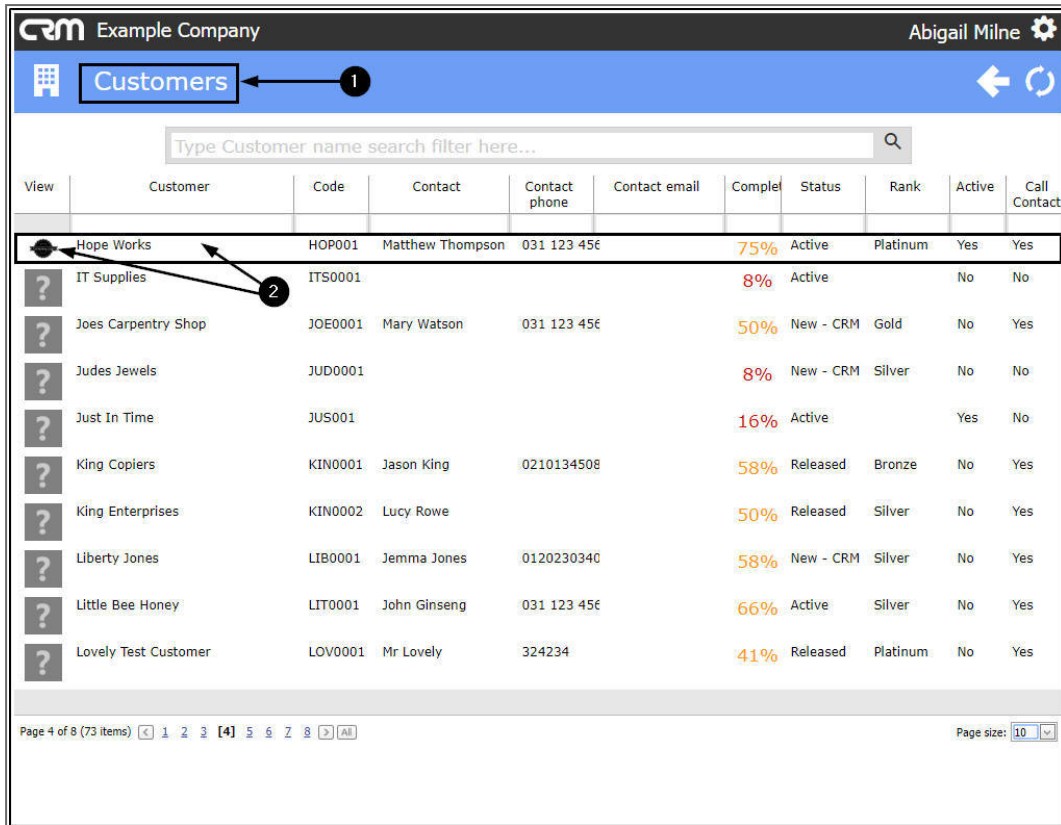
1. In the **Dashboard** (Home page),
2. Click on the **Customers** tile.
3. **Note:** The number in the top left of the tile indicates how many customers that you are linked to.

The screenshot shows a CRM dashboard for 'Example Company' with the user 'Abigail Milne'. The dashboard includes a search bar, a 'Dashboard' tab, and several data visualization tiles:

- Activities for Last 30 Days:** A table with columns for Description, Target, Existing Custmrs, and New Custmrs.
 

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	0
Email	30	0	0
Meeting	40	0	0
On Site inspection	50	0	0
Site inspection	2	0	0
- 1 Month Performance:** A bar chart showing performance metrics for Cases, Invoices, Orders, and Quotes. The Y-axis ranges from 0.00 to 15,000.00.
- 4 Month Pipeline:** A line chart showing a pipeline over a 4-month period from Aug 2019 to Nov 2019. The Y-axis ranges from 0.00 to 0.50.
- Activity Tiles:** A grid of tiles for 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'equipment', and '3rd party'. The 'customers' tile is highlighted with a blue box and a '1' callout. The 'quotes' tile has a '2' callout, and the 'recommendations' tile has a '3' callout.

- The **Customers** listing page will open.
  - Here you can view all the customers where you are either the **main** salesperson or **linked** as a salesperson.
- Select the specific customer that you wish to view by clicking on the **Customer Icon**, in the **View** column.



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

If you wish to have more space on this page to view your customer information more clearly, you can change your page **Settings**.

## **SELECT THE 'HIDE DASHBOARD PANEL ON CUSTOMER PAGE' SETTING**

2. Click on the **Settings** icon.

CRM Example Company Abigail Milne

**Hope Works** + Search

### Activities for Last 30 Days

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

### 1 Month Performance

Bar chart showing performance for Cases, Invoices, Orders, and Quotes from Sep 2019 to Dec 2019.

### 4 Month Pipeline

Line chart showing pipeline performance from Sep 2019 to Dec 2019.

Created: 2014/04/03 11:46:44 PM

**Hope Works - HOP001**

Trading Name Hope Works 75%

Registered Name Hope Works (Pty) Lts

Description

VAT No 987654321

Registration 123456789

Rank Platinum

Website <http://www.hopeworks.co.za>

Phone 031 123 4567

### 12 Months Sales History

Bar chart showing sales history from September 2018 to September 2019. Legend: Contract Income (yellow), Sales Revenue (blue).

create cold call

recommendations

warnings

customers

cases

activities

quotes

orders

invoices

credit notes

equipment

contracts

service calls

3rd party

files

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

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main view is for customer 'Hope Works - HOP001'. On the left, there's a table of activities for the last 30 days. Below that is a grid of functional tiles. On the right, there's a customer profile with details like Trading Name, Registered Name, VAT No, Registration, Rank, Website, and Phone. Below the profile is a '12 Months Sales History' bar chart. An 'Options' panel is overlaid on the right side of the screen, containing several checkboxes. Two blue arrows and numbers indicate the steps to hide the dashboard panel:

1. As you select the check box, (referring to the 'Hide dashboard panel' checkbox)
2. The **Dashboard panel** will disappear from the screen. (referring to the 'Hide dashboard panel on customer page' checkbox)

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

Trading Name	Hope Works	75%
Registered Name	Hope Works (Pty) Lts	
Description		
VAT No	987654321	
Registration	123456789	
Rank	Platinum	
Website	<a href="http://www.hopeworks.co.za">http://www.hopeworks.co.za</a>	
Phone	031 123 4567	

Month	Contract Income	Sales Revenue
September 2018	0	0
October 2018	0	0
November 2018	0	0
December 2018	0	0
January 2019	0	0
February 2019	0	0
March 2019	0	0
April 2019	0	0
May 2019	0	0
June 2019	0	0
July 2019	0	0
August 2019	0	0
September 2019	0	0

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

The screenshot displays a CRM dashboard for 'Example Company' user 'Abigail Milne'. The dashboard is titled 'Hope Works' and features a grid of functional tiles:

- create cold call
- recommendations
- warnings
- customers
- cases
- activities
- quotes
- orders
- invoices
- credit notes
- equipment
- contracts
- service calls
- 3rd party
- files

Navigation and settings options are located at the top right:

- settings
- salesmen settings
- customer ranks
- case config
- logout

An 'Options' menu is open, showing the following settings:

- Show items for subordinates
- Exclude deleted customers in search on Cold Call screen
- Hide dashboard panel
- Hide dashboard panel on customer page

The '12 Months Sales History' chart shows data for September 2018:

Month	Contract Income	Sales Revenue
September 2018	0	0

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- Click outside of the Settings frame to view the full page without the Dashboard.

The screenshot displays a CRM interface for 'Example Company' with user 'Abigail Milne'. The main view is for 'Hope Works - HOP001'. On the left is a grid of 15 functional tiles: create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files. The main area shows the company logo, a 'Created' timestamp, and a list of details: Trading Name (Hope Works), Registered Name (Hope Works (Pty) Lts), Description, VAT No (987654321), Registration (123456789), Rank (Platinum), Website (http://www.hopeworks.co.za), and Phone (031 123 4567). A '75%' indicator is present. Below this is a '12 Months Sales History' bar chart showing 'Contract Income' (yellow) and 'Sales Revenue' (blue) from September 2018 to September 2019. The chart shows a significant revenue spike in October 2018 and a dip in March 2019. At the bottom, there is a footer with 'hp competition application', '©2019 CO3 Technologies (Pty) Ltd ( 3.5.6.0 / 3.5.6.0)', and the CO3 TECHNOLOGIES logo.

## VIEW CUSTOMER DETAILS TILES

1. Here you can view the Customer *Details Tiles*.
2. **Hover over** any of the tiles to display that specific tile description:
  - Sales
  - Addresses
  - Contacts
  - Open Activities
  - Notes
  - Salesmen

The screenshot displays a CRM interface for 'Example Company' with user 'Abigail Milne'. The main view is for 'Hope Works - HOP001'. On the left is a grid of functional tiles: create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files. The right side shows company details: Trading Name (Hope Works), Registered Name (Hope Works (Pty) Lts), Description, VAT No (987654321), Registration (123456789), Rank (Platinum), Website (http://www.hopeworks.co.za), and Phone (031 123 4567). A '12 Months Sales History' bar chart shows 'Contract Income' (yellow) and 'Sales Revenue' (blue) from September 2018 to September 2019. A 'Sales' tile is highlighted with a red border, and an 'Addresses' text box is shown below it. Numbered callouts '1' and '2' indicate the tile and the text box respectively.

## SALES

1. Hover over the **Sales** tile to bring up the description text box.
2. The **12 Months Sales History** will be displayed by default, in the **Details** frame, as the Customer Dashboard opens.



**CRM Example Company** | Abigail Milne

**Hope Works** | Search

**Hope Works - HOP001**

Trading Name: Hope Works 75%  
Registered Name: Hope Works (Pty) Lts  
Description: [Company Logo]  
VAT No: 987654321  
Registration: 123456789  
Rank: Platinum  
Website: <http://www.hopeworks.co.za>  
Phone: 031 123 4567

Created: 2014/04/03 1:46:44 PM

**12 Months Sales History**

Month	Contract Income	Sales Revenue
September 2018	0	0
October 2018	0	5500
November 2018	0	0
December 2018	0	0
January 2019	0	0
February 2019	0	0
March 2019	0	-4500
April 2019	0	0
May 2019	0	0
June 2019	0	0
July 2019	0	0
August 2019	0	0
September 2019	0	0

## ADDRESSES

- Click on the **Addresses** tile.

The screenshot displays a CRM interface for 'Example Company' with user 'Abigail Milne'. The main view is for customer 'Hope Works' (HOP001). It features several data visualization components:

- Activities for Last 30 Days:** A table showing activity counts against targets.
- 1 Month Performance:** A bar chart showing performance metrics for Cases, Invoices, Orders, and Quotes.
- 4 Month Pipeline:** A line chart showing the pipeline over a 4-month period.
- Customer Information:** A central panel with a company logo, trading name, registered name, VAT number, registration number, rank, website, and phone number.
- 12 Months Sales History:** A bar chart showing sales revenue and contract income from September 2018 to September 2019.
- Navigation Tiles:** A grid of 18 tiles for various functions like 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'.

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

Month	Contract Income	Sales Revenue
September 2018	0	0
October 2018	0	0
November 2018	0	0
December 2018	0	0
January 2019	0	0
February 2019	0	0
March 2019	0	0
April 2019	0	0
May 2019	0	0
June 2019	0	0
July 2019	0	0
August 2019	0	0
September 2019	0	0

- The customer **addresses** will be displayed in the details frame.
- You can use the **Page Reference field** to scroll between the address pages.
  - The customer addresses can only be viewed here - if you wish to make changes to the addresses, refer to **customer addresses**.

The screenshot displays a CRM interface for 'Example Company' with user 'Abigail Milne'. The main view is for 'Hope Works - HOP001'. On the left is a grid of 18 tiles for actions 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 shows a company logo, a '75%' progress indicator, and contact details: Trading Name (Hope Works), Registered Name (Hope Works (Pty) Lts), VAT No (987654321), Registration (123456789), Rank (Platinum), Website (http://www.hopeworks.co.za), and Phone (031 123 4567). Below this is a table of addresses with a pagination control showing 'Page 1 of 2' and 'Rows per page: 1'. A search bar is at the top right.

Trading Name	Hope Works	75%
Registered Name	Hope Works (Pty) Lts	
Description		
VAT No	987654321	
Registration	123456789	
Rank	Platinum	
Website	http://www.hopeworks.co.za	
Phone	031 123 4567	

PO Box 7452 Forest Hills New Town Durban South South Africa 1234	Plot 91 Leaf Road Forest Hills New Town Durban South South Africa 1234	Should see this for physical address 0000
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## CONTACTS

- Client on the *Contacts* tile.



1. The customer **contacts** will be displayed in the details frame.
2. By default, the details frame will only display the **sales** contacts - these are marked with an orange bar.

## SHOW SALES / NON-SALES CONTACTS

3. If you would like to see all the customer contacts, select the **Show non-sales contacts** checkbox.

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main view is for 'Hope Works - HOP001'. On the left is a grid of functional tiles. The right pane shows company details and a list of contacts. Callout 1 points to the 'Website' field. Callout 2 points to the 'Show non-sales contacts' checkbox. Callout 3 points to the 'Show non-sales contacts' checkbox.

**Company Details:**

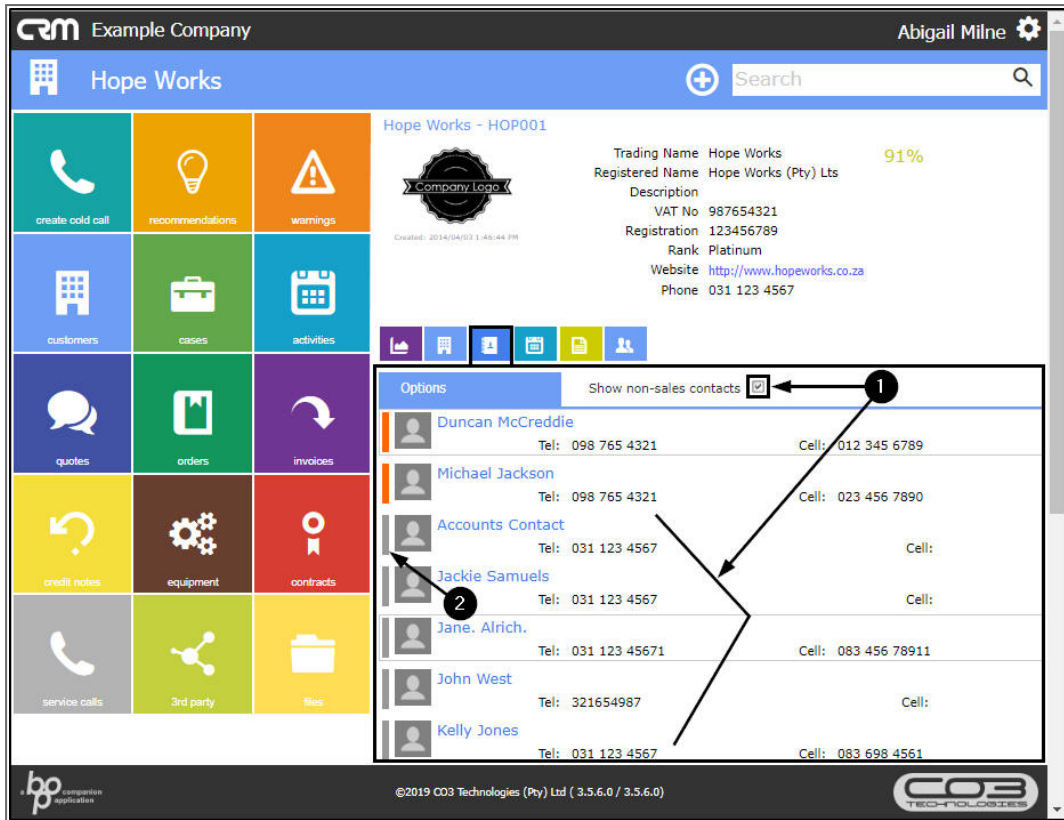
- Trading Name: Hope Works (91%)
- Registered Name: Hope Works (Pty) Lts
- Description: [Redacted]
- VAT No: 987654321
- Registration: 123456789
- Rank: Platinum
- Website: <http://www.hopeworks.co.za>
- Phone: 031 123 4567

**Contacts List:**

Name	Tel:	Cell:
Duncan McCreddie	098 765 4321	012 345 6789
Michael Jackson	098 765 4321	023 456 7890

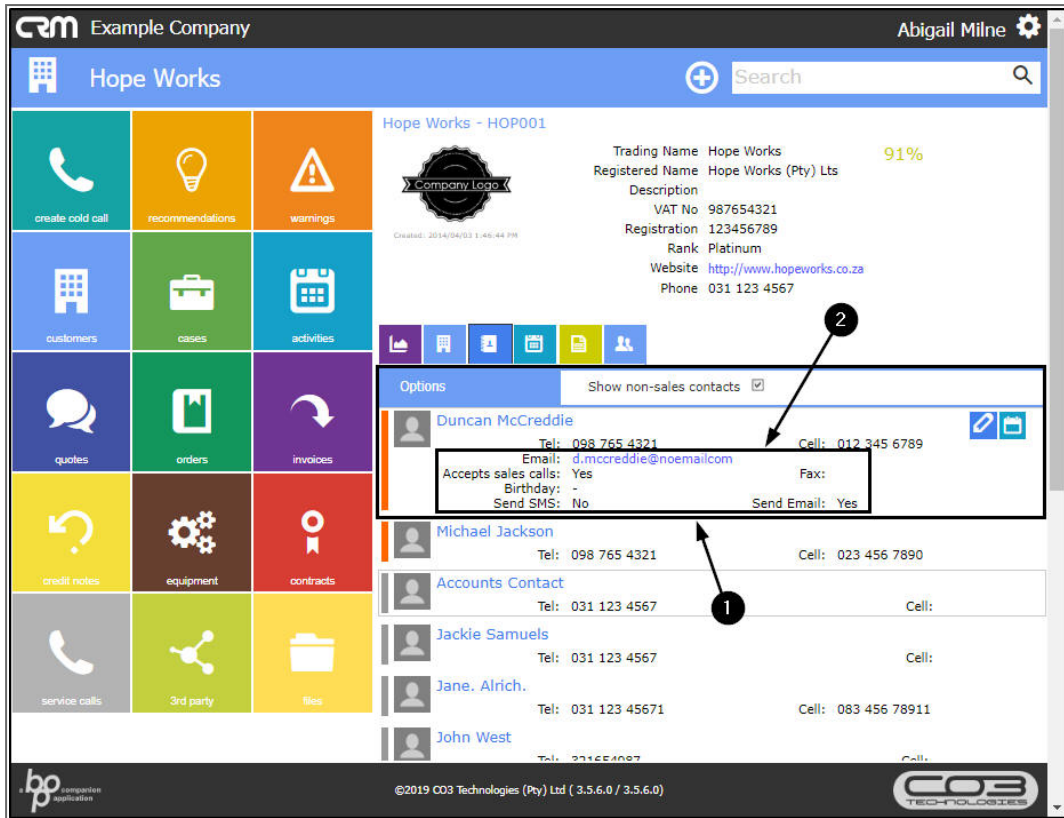
Page 1 of 1 (2 items) | Page size: 20

1. **Non-sales** contacts will now also display.
2. These are marked with a grey bar.



## EXPAND CONTACT DETAILS

1. **Click once** on any specific contact frame to **expand** it.
2. You will now be able to view extra details for example: the contact **email address** and whether this contact **accepts sales calls**.

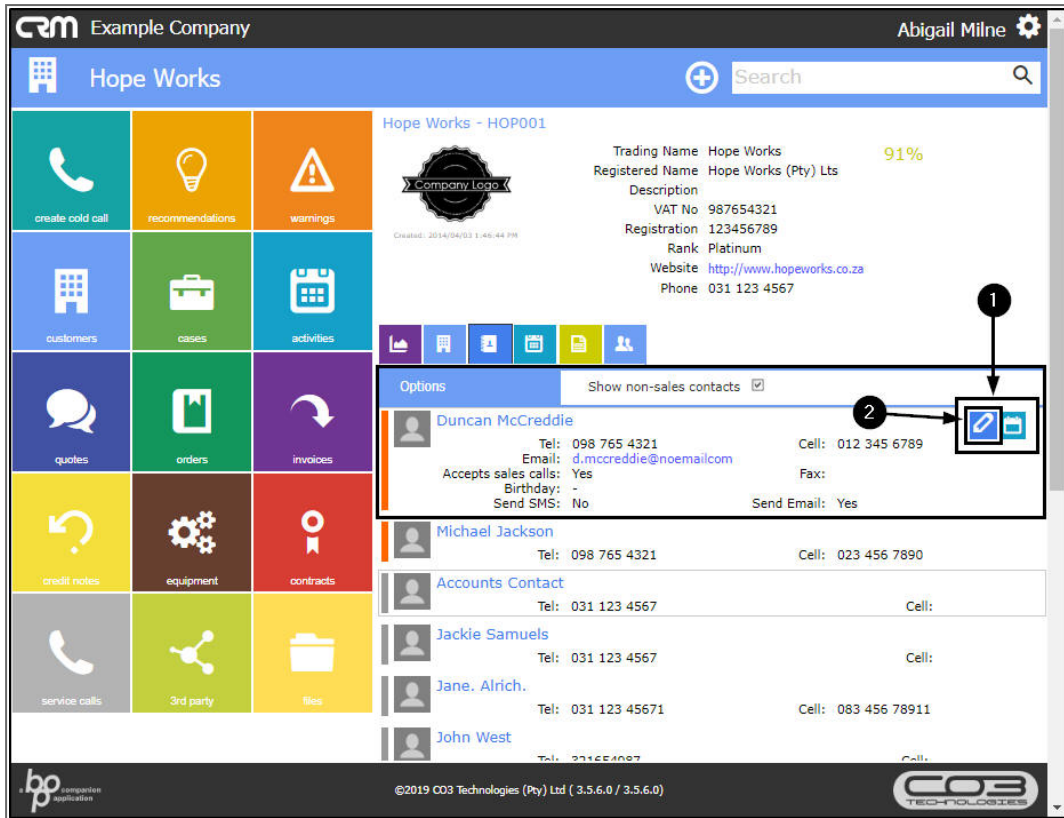


## VIEW/EDIT THIS SALES CONTACT

1. If you expanded a Sales contact - you will also now be able to view 2 **Action** buttons in this frame.

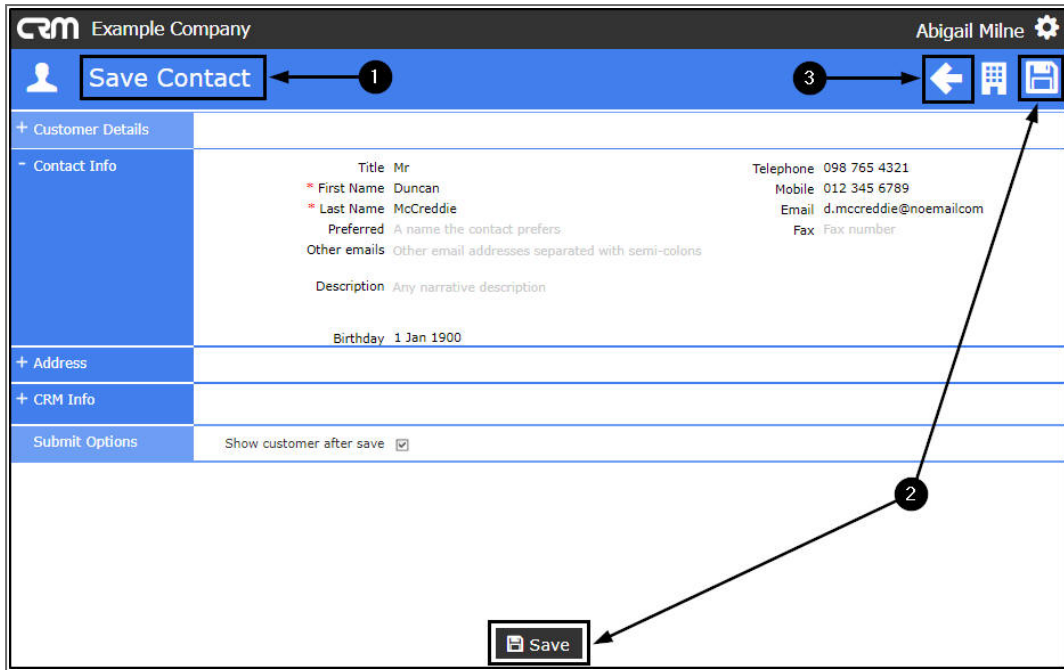
**Note:** If you *hover over* any Sales contact (without expanding the contact frame - you will also be able to view these **Action** buttons.

2. Click on the **View/Edit this Contact** button.



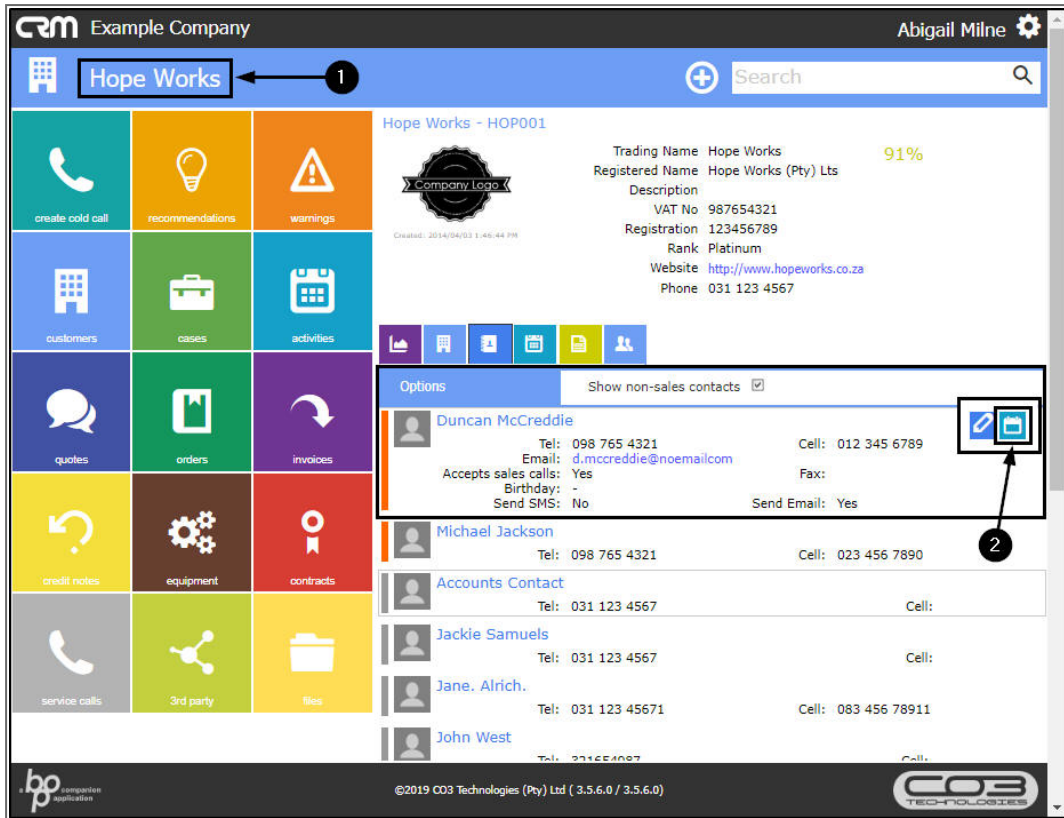
1. The **Save Contact** page will open.
2. Either, update the contact information as required (refer to **Add/Edit Contact** for more details) and click on **Save**.
3. Or, return to the **Customer page** if you do not wish to make or save any changes.



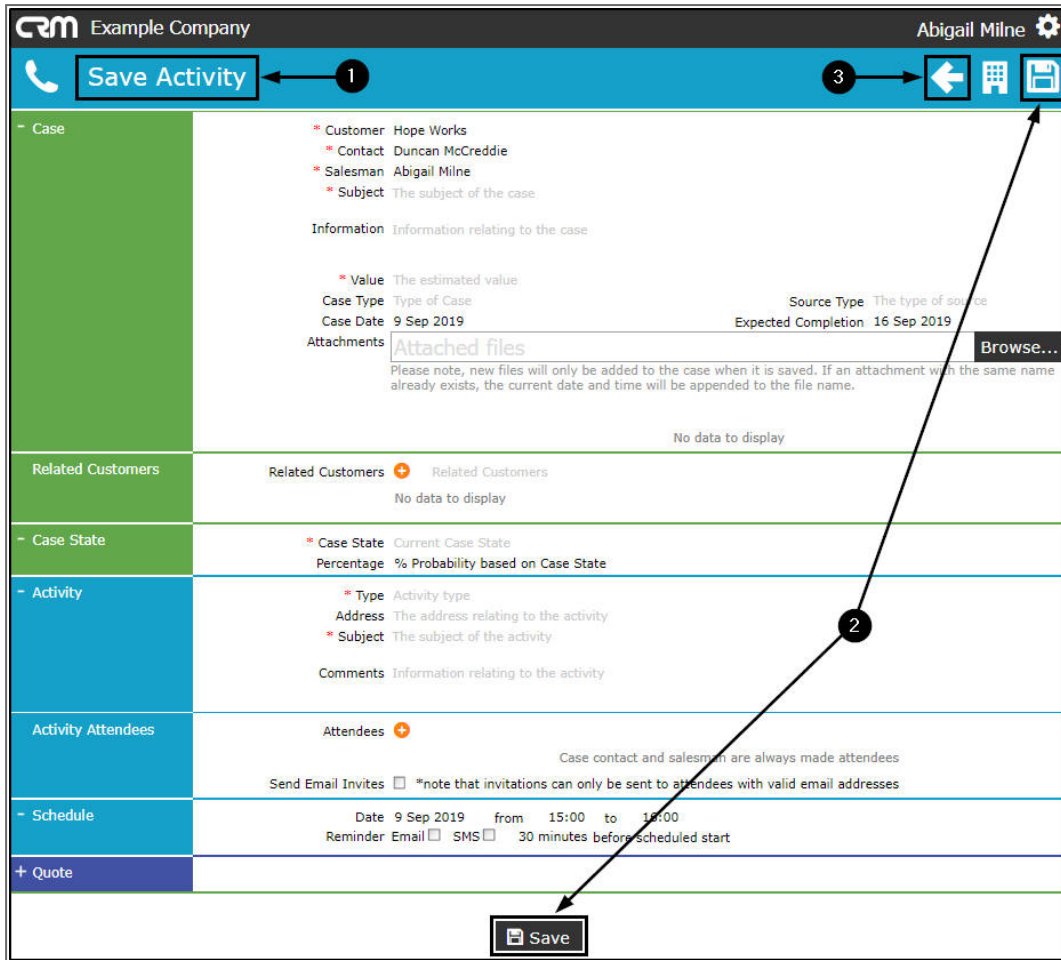


## CREATE A NEW CASE AND ACTIVITY

- In the *Customer* page,
- Click on the *Create a new case and activity for this contact* button.



- The **Save Activity** page will open.
- Either, update the Case and Activity details as required (refer to **Add a New Activity** for more details) and click on **Save**.
- Or, return to the **Customer page** if you do not wish to make or save any changes.



## CUSTOMER DETAILS

### OPEN ACTIVITIES

1. In the *Customer page*,
2. Click on the *Open Activities* tile.

The screenshot displays a CRM interface for 'Example Company' with user 'Abigail Milne'. The main view is for customer 'Hope Works - HOP001'. On the left, a grid of action tiles includes 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The 'activities' tile is highlighted with a callout '2'. The top navigation bar shows 'Hope Works' with a callout '1'. To the right, customer details are shown: Trading Name (Hope Works), Registered Name (Hope Works (Pty) Ltd), Description, VAT No (987654321), Registration (123456789), Rank (Platinum), Website (http://www.hopeworks.co.za), and Phone (031 123 4567). Below this is a 'Months Sales History' bar chart showing 'Contract Income' (orange) and 'Sales Revenue' (blue) from September 2018 to September 2019. A legend at the bottom of the chart identifies the colors.

1. A list of all **open activities** for the selected customer will be displayed in the Details frame.

## View the Action buttons

2. **Hover over** a selected activity.



1. The customer **Action buttons** will be displayed.

## CONTACTS

### EXPAND CONTACT DETAILS

2. **Single click** anywhere on a selected activity (but not directly on any of the Action buttons).

The screenshot displays a CRM interface for 'Example Company' with a user 'Abigail Milne'. The main view is for 'Hope Works - HOP001', showing a 91% completion status and various contact details. A list of activities is shown below, with the first activity, 'Email - Email new brochures to customer', selected and expanded to show its details. A second activity, 'Meeting - Meeting done', is also visible in the list.

**Customer Details:**

- Trading Name: Hope Works
- Registered Name: Hope Works (Pty) Lts
- Description: [Redacted]
- VAT No: 987654321
- Registration: 123456789
- Rank: Platinum
- Website: <http://www.hopeworks.co.za>
- Phone: 031 123 4567

**Activities List:**

Activity Name	When	Who	Tel	Email	Cell	Bus
Email - Email new brochures to customer	10 Sep 2019, 12:00-13:00	Duncan McCreddie	098 765 4321	d.mccreddie@noemail.com	012 345 6789	031 123 4567
Meeting - Meeting done	4 Nov 2016, 08:00-09:00	Matthew Thompson	031 123 4567		083 123 4567	031 123 4567
Meeting - Discuss best options	3 Nov 2016, 16:00-17:00	Kelly Jones	031 123 4567		083 698 4561	031 123 4567
Phone call - time will open doors	8 Oct 2016, 09:11-10:07	Kelly Jones	031 123 4567		083 698 4561	031 123 4567
Phone call - testing the time	7 Oct 2016, 17:00-18:00	Kelly Jones				

- The selected activity frame will **expand** to display more details regarding the activity.

The screenshot displays a CRM interface for 'Example Company' with user 'Abigail Milne'. The main view is for customer 'Hope Works - HOP001', showing a 91% completion status and various contact details. A grid of 15 tiles provides quick access to functions like 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. Below this, a list of activities is shown, including an email and three meetings. A red circle and arrows highlight the 'Email - Email new brochures to customer' entry, which is expanded to show details like 'When: 10 Sep 2019, 12:00-13:00', 'Who: Duncan McCreddie', and 'Where: Plot 91 Leaf Road Forest Hills New Town Durban South South Africa'.

## NOTES

1. In the *Customer page*,
2. Click on the *Notes* tile.

The screenshot displays the CRM interface for 'Example Company' with user 'Abigail Milne'. The main view is for customer 'Hope Works - HOP001'. The interface includes a navigation menu on the left with tiles for 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The top right has a search bar. The customer details section shows a 91% rating and various contact information. A 'Notes' tile is highlighted with a callout box labeled '2'. Below the details is a 'Months Sales History' bar chart showing 'Contract Income' (orange) and 'Sales Revenue' (blue) from September 2018 to September 2019.

Month	Contract Income	Sales Revenue
September 2018	0	0
October 2018	0	0
November 2018	0	0
December 2018	0	0
January 2019	0	0
February 2019	0	0
March 2019	0	0
April 2019	0	0
May 2019	0	0
June 2019	0	0
July 2019	0	0
August 2019	0	0
September 2019	0	0

- A list of all the **Notes** linked to this customer will be displayed.
  - Notes can only be viewed here - if you wish to add a note, refer to **Add Note**.



The screenshot displays a CRM interface for 'Example Company' with the user 'Abigail Milne'. The main view is for 'Hope Works - HOP001'. The interface includes a grid of functional tiles on the left and a central details pane. The details pane shows company information and a list of activities.

**Customer Details:**

- Trading Name: Hope Works
- Registered Name: Hope Works (Pty) Lts
- Description: [Redacted]
- VAT No: 987654321
- Registration: 123456789
- Rank: Platinum
- Website: <http://www.hopeworks.co.za>
- Phone: 031 123 4567

**Activities List:**

- Abigail Milne - 30 Jul 2019 16:21:00: All quotes to be sent to both the CFO and the Buying Officer.
- Judith Mudzengi - 09 Feb 2017 11:21:51: Call customer to confirm order.
- Bianca Du Toit - 18 Apr 2016 12:09:00: Existing third party contract pending renewal. Client would like to switch.
- Belinda Sharman - 04 Aug 2014 00:00:00: Check toner yield.

Page 1 of 1 (4 items) | Page size: 10

## VIEW SALESMAN/ADDITIONAL SALESMEN

1. In the *Customer home page*,
2. Click on the *Salesmen* tile.

The screenshot displays the CRM interface for 'Example Company' with user 'Abigail Milne'. The main view is for customer 'Hope Works - HOP001'. On the left, a grid of 18 tiles provides quick access to various functions: create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files. The top navigation bar includes a search bar and a 'Salesmen' tile (indicated by a circled '2'). The customer details section shows a 91% rating and various identification numbers. Below this is a '12 Months Sales History' bar chart showing 'Contract Income' (yellow) and 'Sales Revenue' (blue) from September 2018 to September 2019. A 'Salesmen' button is visible above the chart.

- A list of all the **Salesmen** linked to this customer will be displayed.
- Salesmen can only be viewed here - if you wish to make changes to the linked salesmen, refer to **Main-tain Customer Salesmen**.

The screenshot displays a CRM interface for 'Example Company' with the user 'Abigail Milne'. The main view is for 'Hope Works - HOP001'. On the left, there is a grid of 15 functional tiles: '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 shows the company logo, a 'Created' timestamp, and a list of details: Trading Name (Hope Works), Registered Name (Hope Works (Pty) Lts), Description, VAT No (987654321), Registration (123456789), Rank (Platinum), Website (http://www.hopeworks.co.za), and Phone (031 123 4567). A progress indicator shows '91%'. Below this is a list of activities with columns for user, date, and time, including entries from Abigail Milne, Judith Mudzengi, Bianca Du Toit, and Belinda Sharman. A search bar and a 'CRM' logo are visible at the top. The footer contains the CO3 Technologies logo and version information: '©2019 CO3 Technologies (Pty) Ltd ( 3.5.6.0 / 3.5.6.0)'.

When you have finished working in this page,

- Either, click on the **CRM logo** to return to the Dashboard (Home page),
- Or, click on the **arrow** in the top left of the screen, to go back to the previous page.

The screenshot displays a web browser window with the following elements:

- Address Bar:** localhost:50000/BPOCRM/ViewCustomer.aspx?CustomerID=2
- Page Header:** CRM Example Company (with a '1' callout), Abigail Milne (with a settings gear icon)
- Navigation Bar:** Hope Works (with a home icon), Search (with a search icon)
- Main Content Area:**
  - Left Column (Action Tiles):**
    - create cold call (phone icon)
    - recommendations (lightbulb icon)
    - warnings (warning triangle icon)
    - customers (building icon)
    - cases (briefcase icon)
    - activities (calendar icon)
    - quotes (speech bubbles icon)
    - orders (shopping cart icon)
    - invoices (document with arrow icon)
    - credit notes (document with arrow icon)
    - equipment (gears icon)
    - contracts (document with ribbon icon)
    - service calls (phone icon)
    - 3rd party (network icon)
    - Res. (folder icon)
  - Right Column (Customer Details):**
    - Title:** Hope Works - HOP001
    - Company Logo:** Hope Works (with 'Created: 2014/04/03 1:46:44 PM' text)
    - Trading Name:** Hope Works (with a 91% status indicator)
    - Registered Name:** Hope Works (Pty) Lts
    - Description:** (empty field)
    - VAT No:** 987654321
    - Registration:** 123456789
    - Rank:** Platinum
    - Website:** http://www.hopeworks.co.za
    - Phone:** 031 123 4567
    - User Profile:** Abigail Milne (a.milne@noemail.com, 012 345 6789)

Footer: bpo comparison application | ©2019 CO3 Technologies (Pty) Ltd ( 3.5.6.0 / 3.5.6.0) | CO3 TECHNOLOGIES

CRM.002.015