CRM CUSTOMERS

CUSTOMER DETAILS TILES

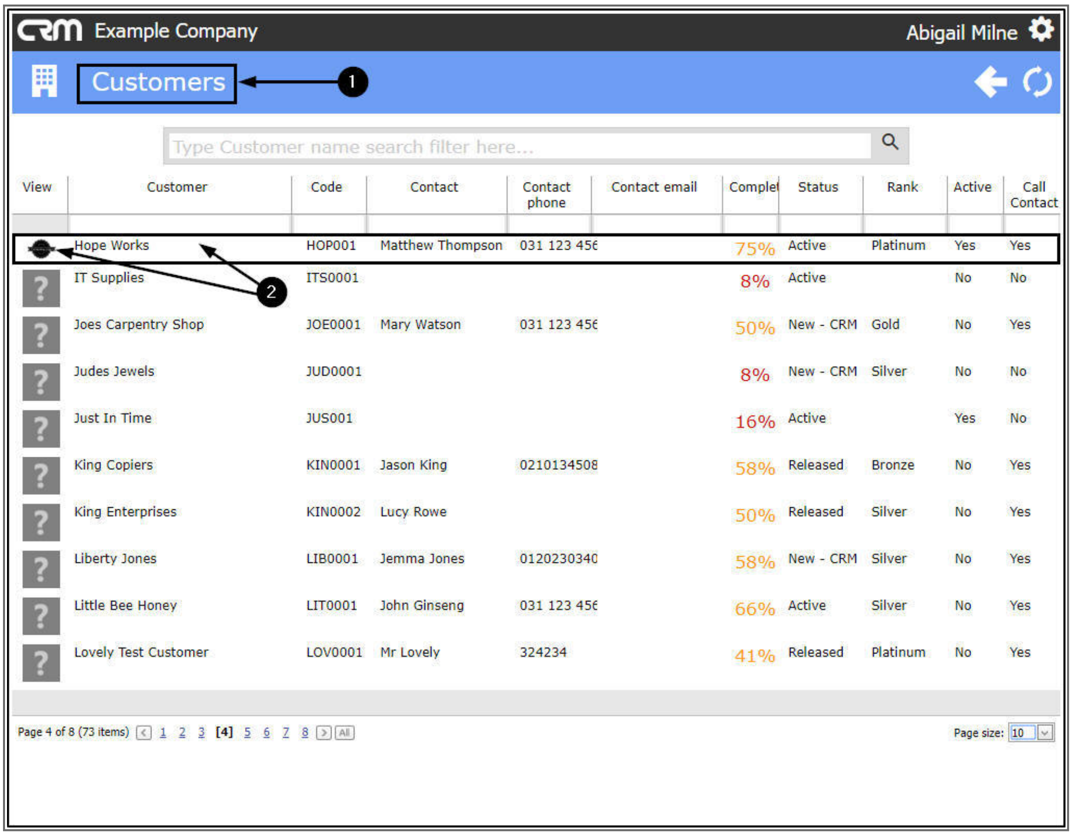
- In the Customer Dashboard (Customer Home page) you can click on customer **Information tiles** which will direct you pages containing information regarding:
  - Customer **Sales History**
  - Customer **Addresses**
  - Customer **Contacts**
  - Customer **Open Activities**
  - Customer **Notes**
 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

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

NAVIGATE TO THE CUSTOMER DASHBOARD

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.

1. 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.
2. 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 <u>space</u> on this page to view your customer information more clearly, you can change your page ***Settings***.

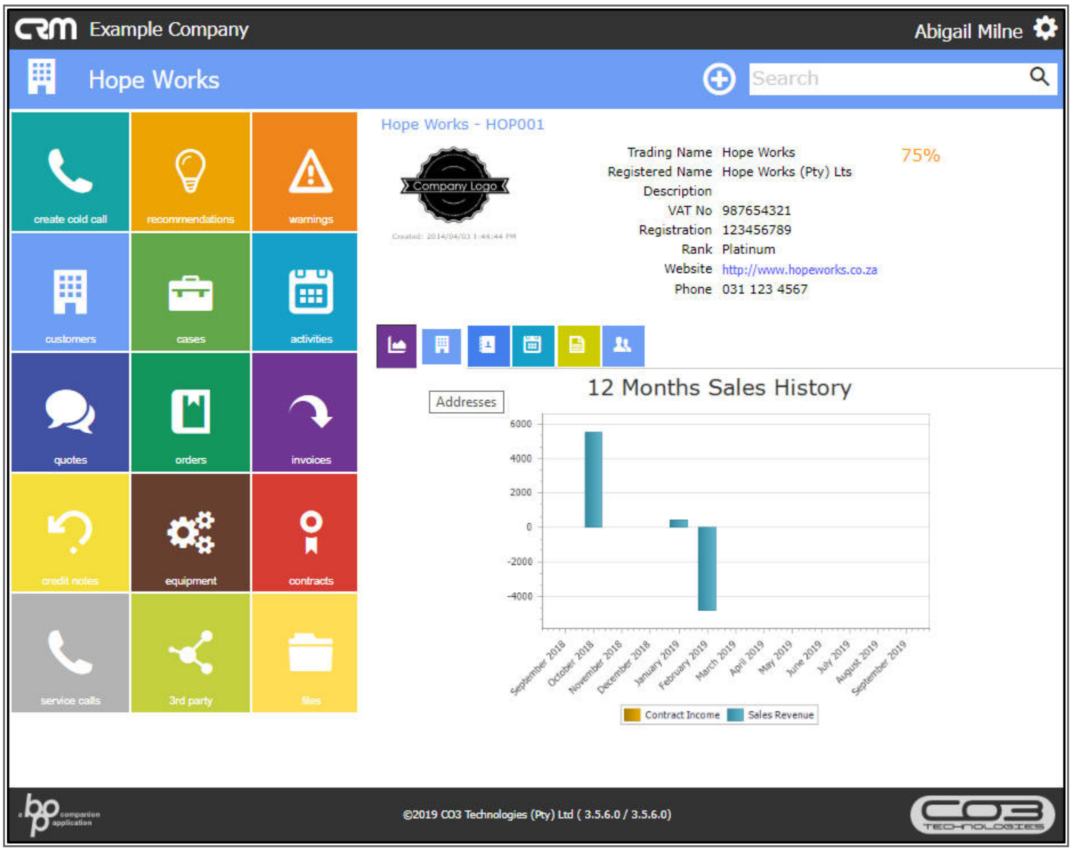
SELECT THE 'HIDE DASHBOARD PANEL ON CUSTOMER PAGE' SETTING

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

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

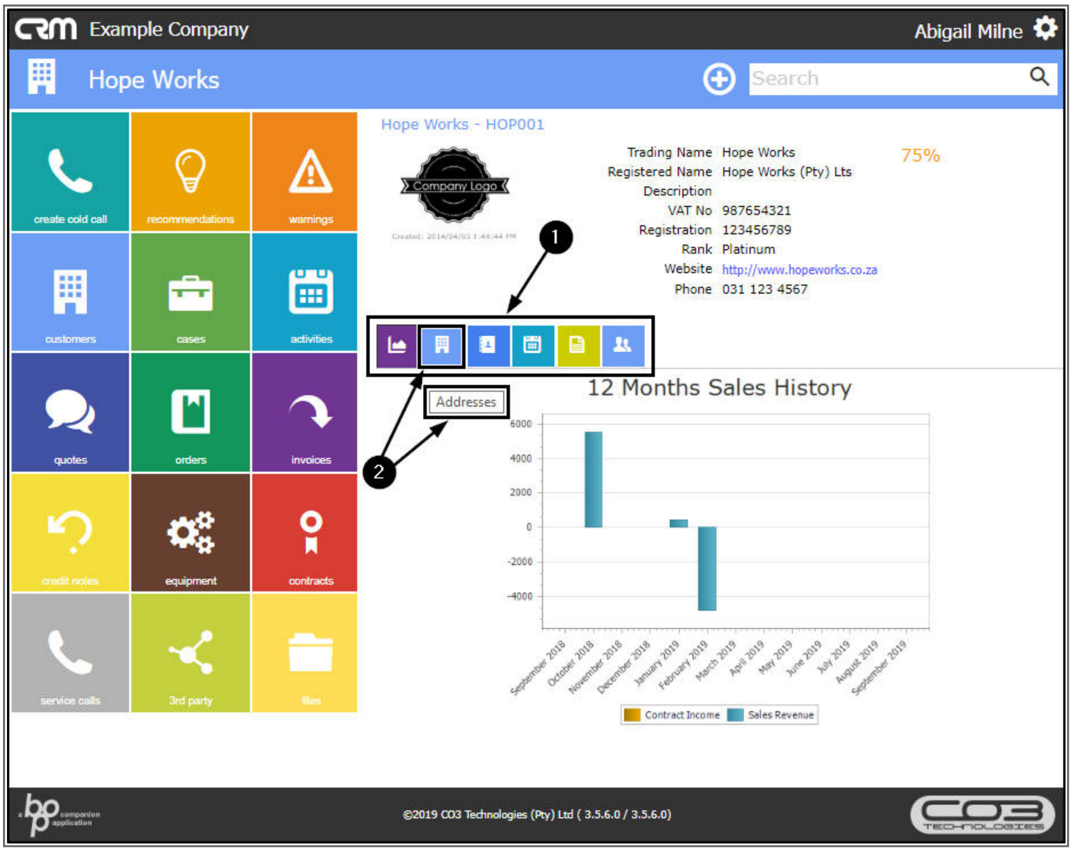
1. As you select the check box,
2. The ***Dashboard panel*** will disappear from the screen.

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



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**

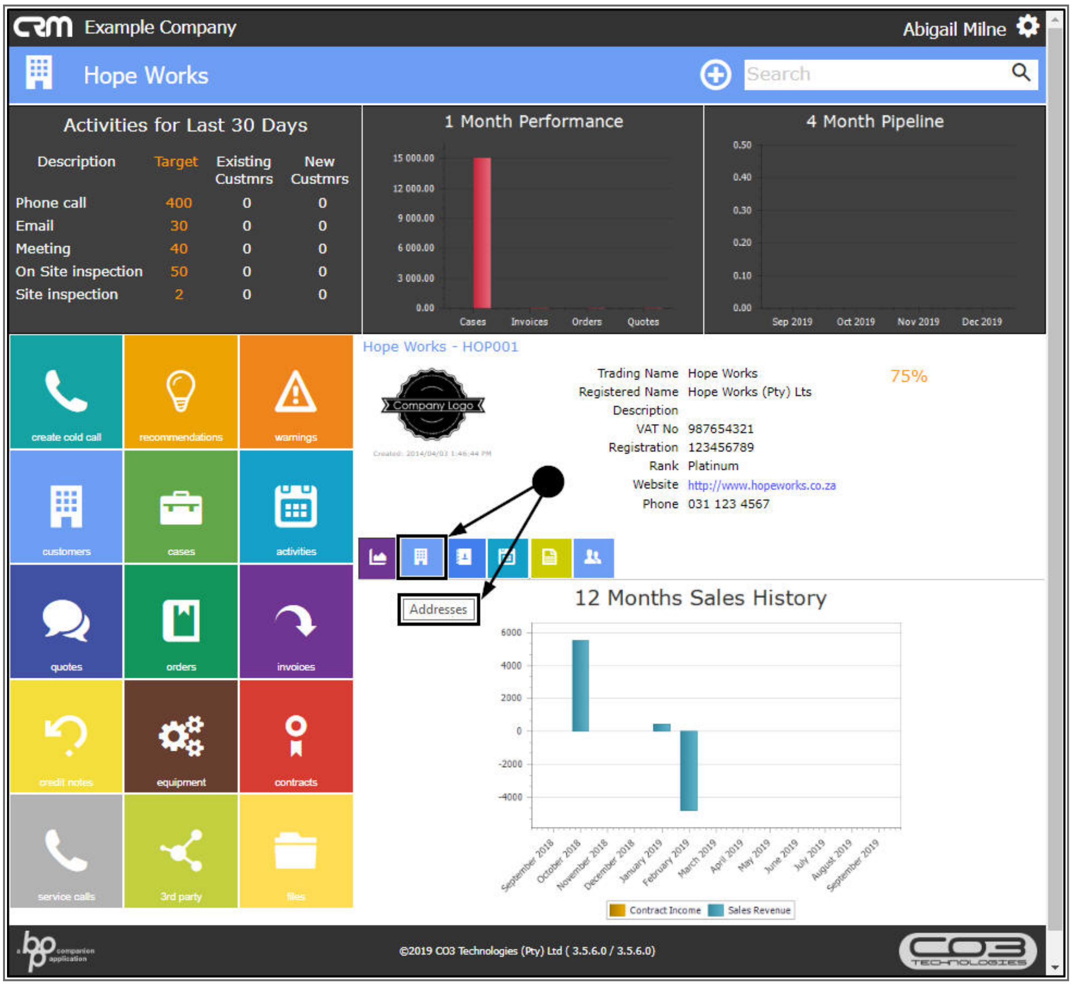


SALES

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.

ADDRESSES

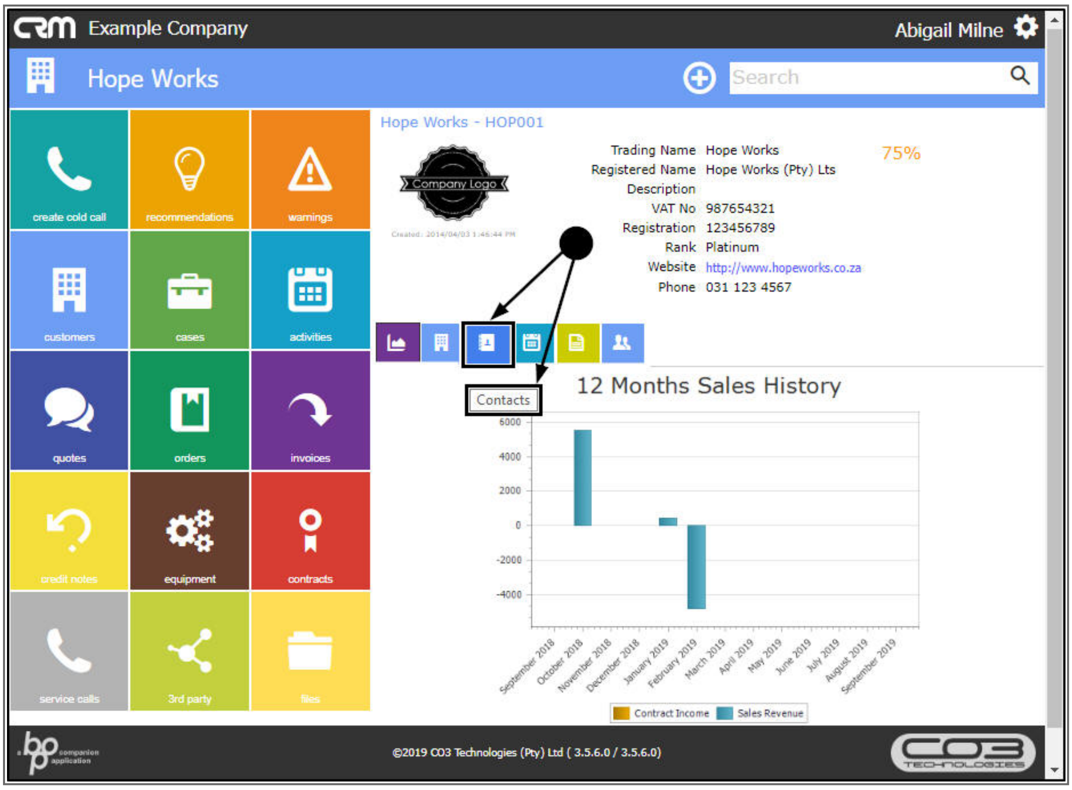
- Click on the ***Addresses*** tile.



- 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.

CONTACTS

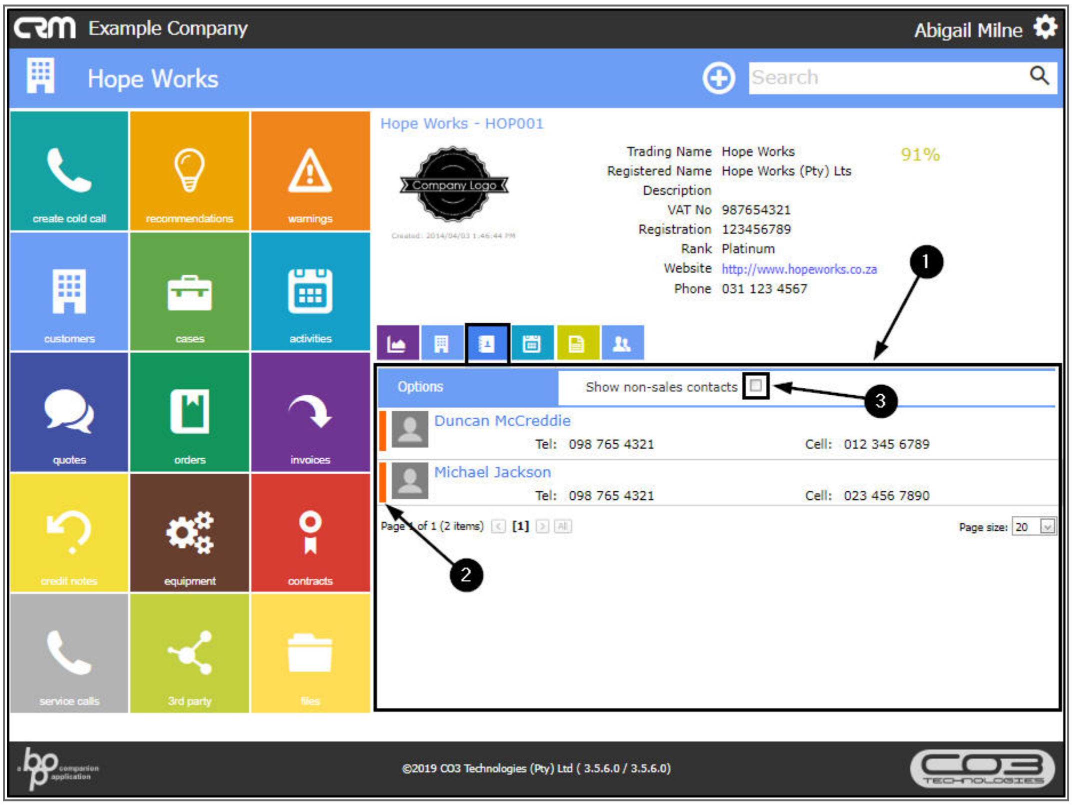
- Client on the ***Contacts*** tile.



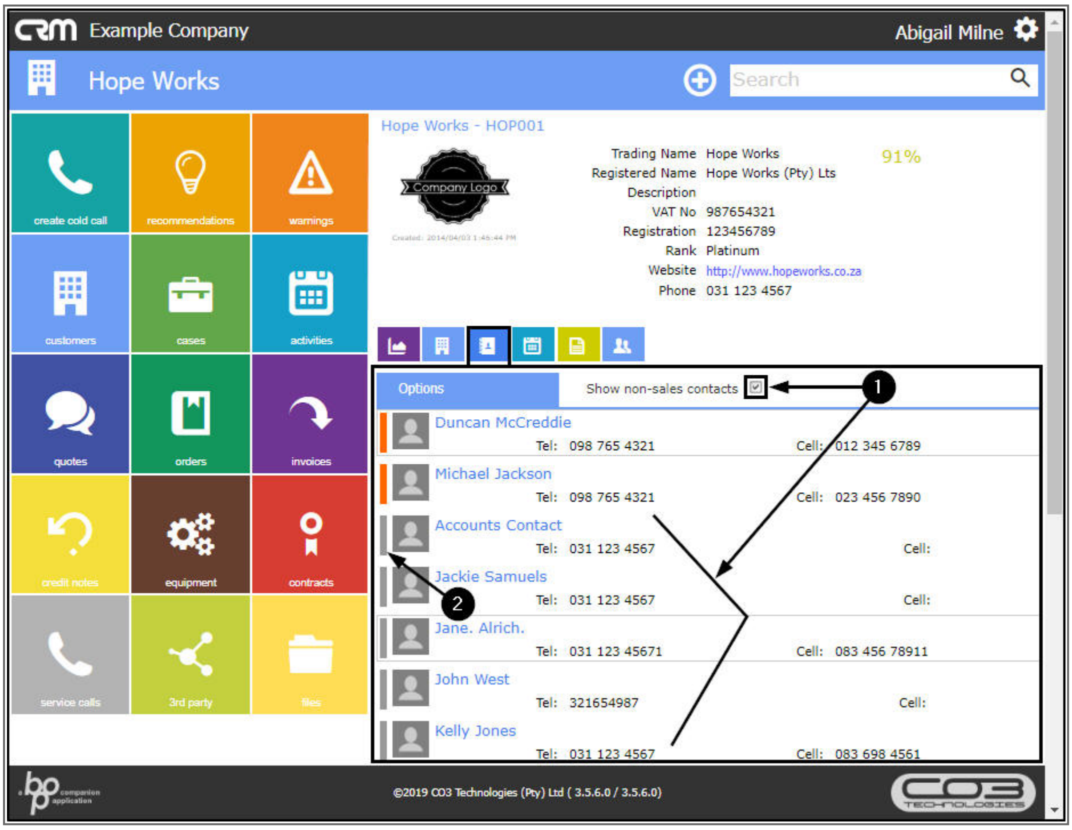
1. The customer ***contacts*** will be displayed in the details frame.
2. By default, the details frame will only display the ***sales*** contacts - these are marked with an orange bar.

SHOW SALES / NON-SALES CONTACTS

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

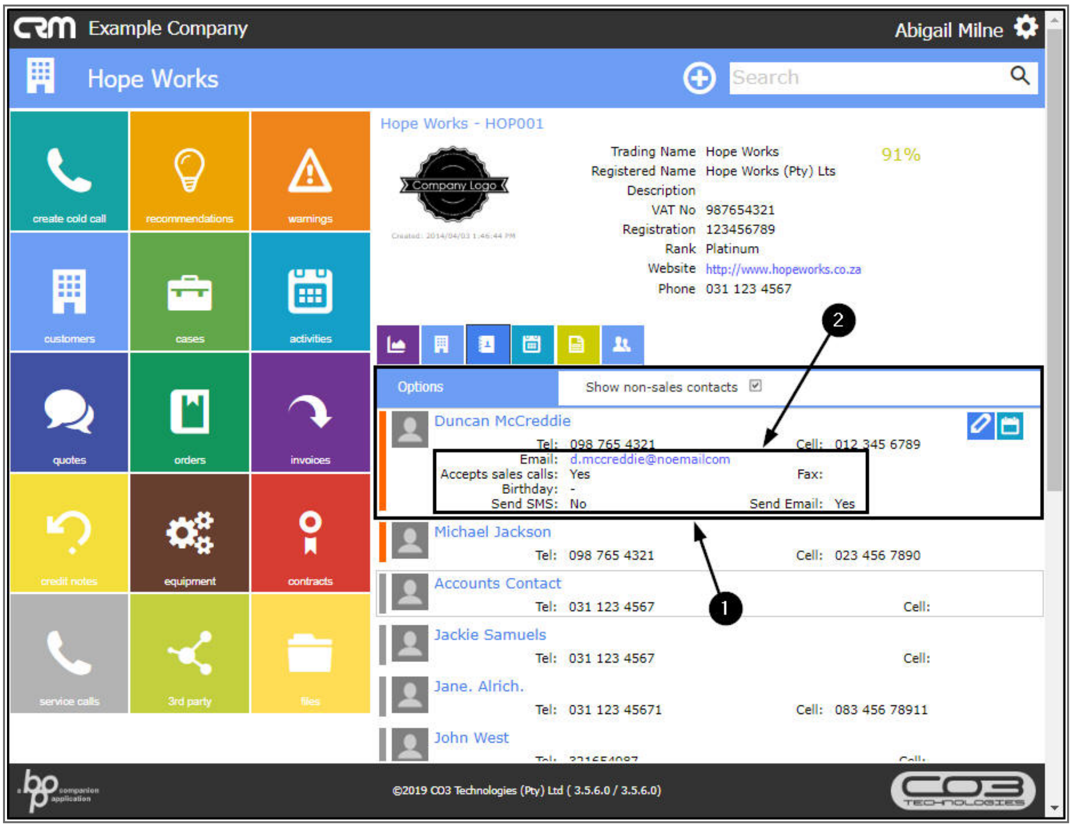


1. ***Non-sales*** contacts will now also display.
2. These are marked with a grey bar.



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***.

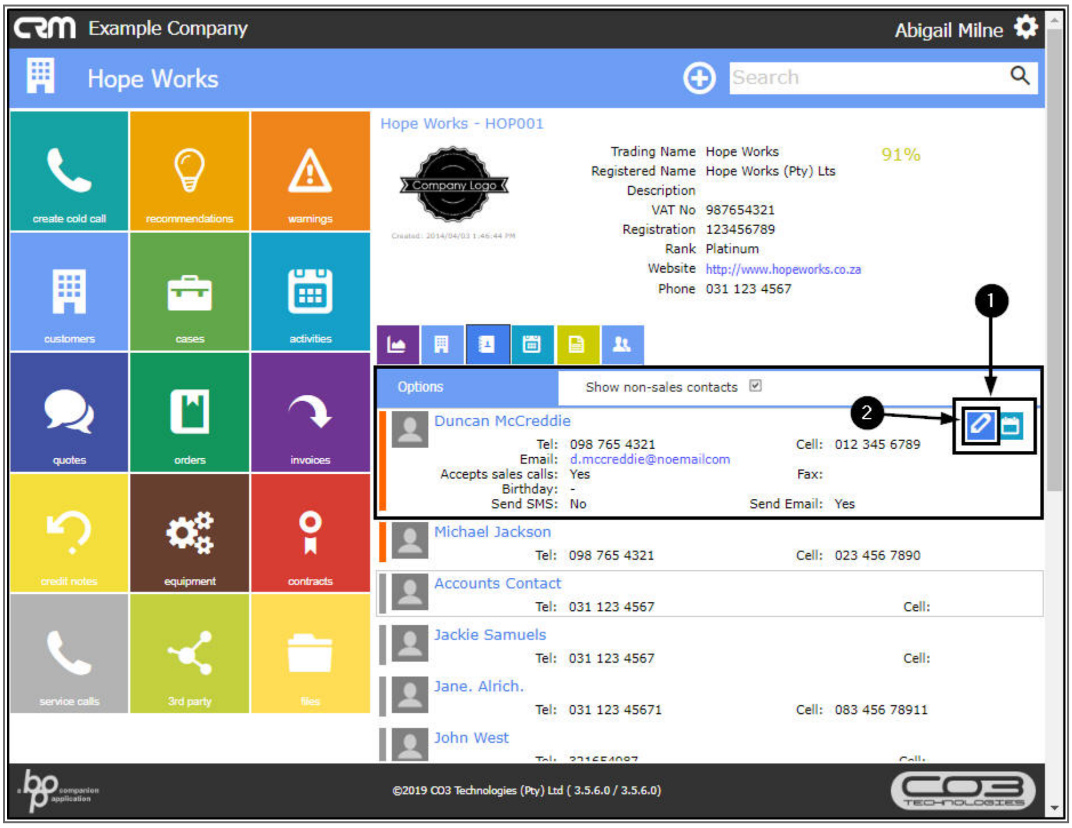


VIEW/EDIT THIS SALES CONTACT

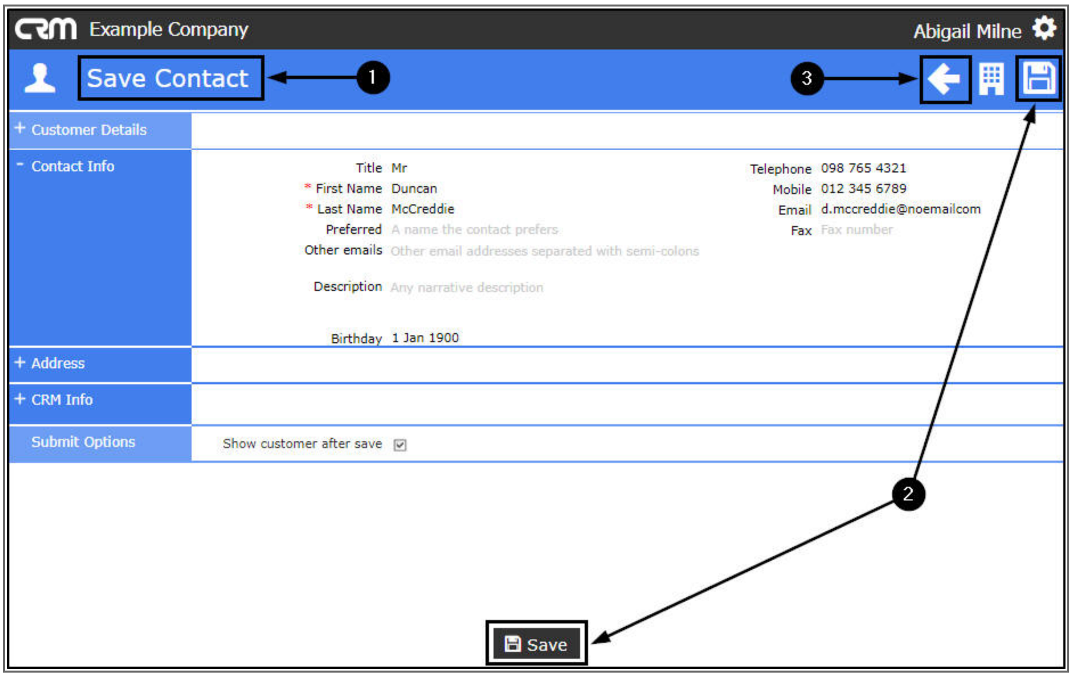
1. If you expanded a Sales contact - you will also now be able to view 2 ***Action*** buttons in this frame.

   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.

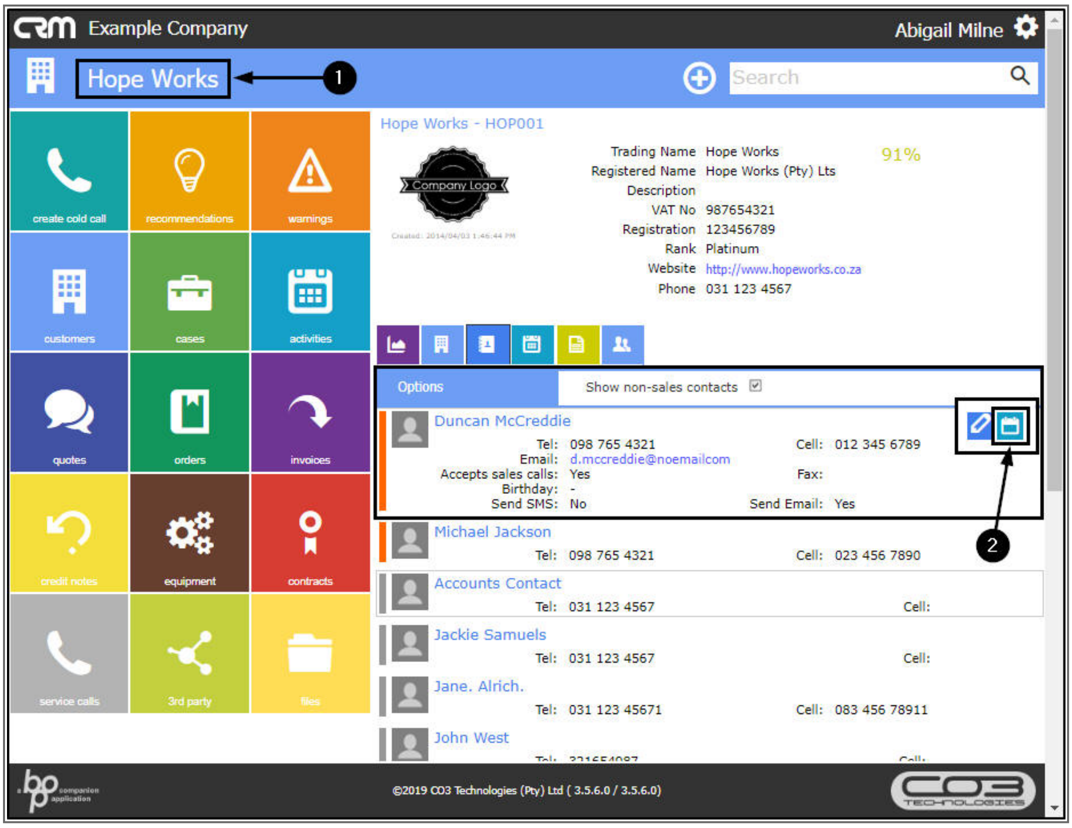


1. The ***Save Contact*** page will open.
2. Either, update the contact information as required (refer to Add/Edit Contact for more details) and click on ***Save***.
3. Or, return to the ***Customer page*** if you do not wish to make or save any changes.

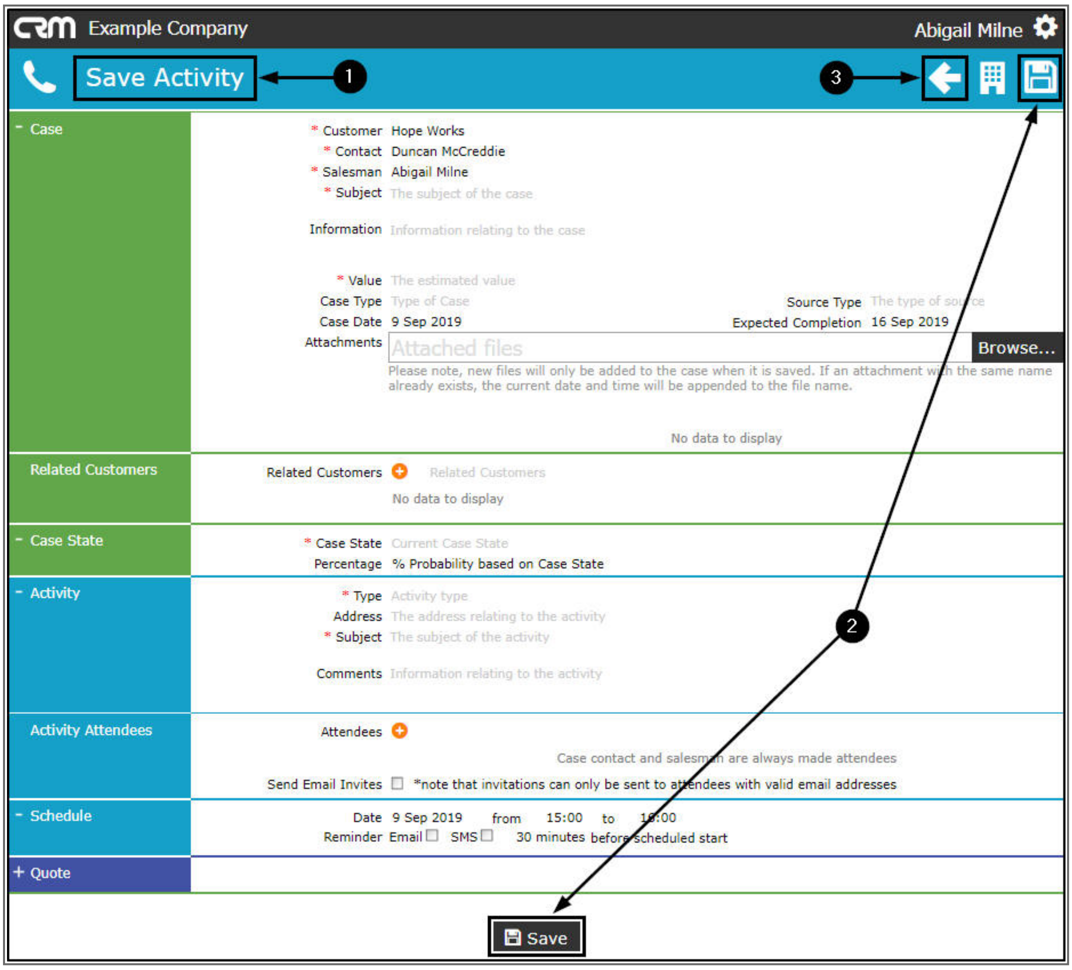


CREATE A NEW CASE AND ACTIVITY

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



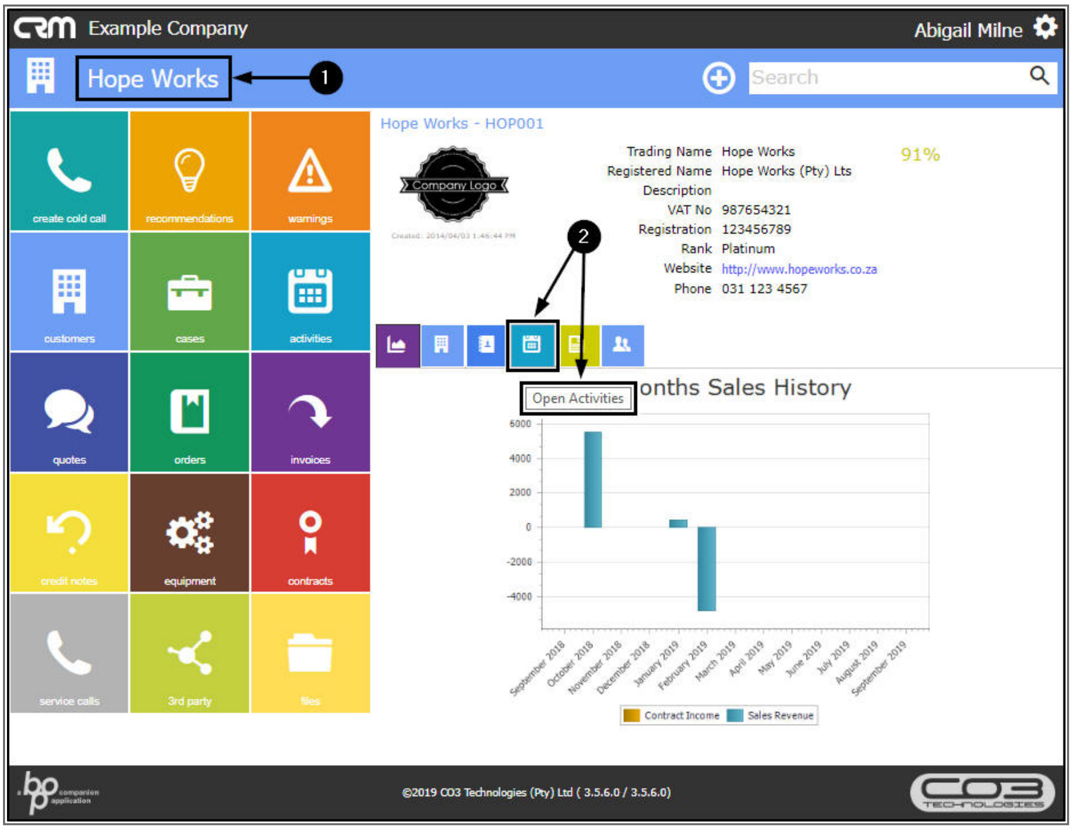
- The ***Save Activity*** page will open.
- Either, update the Case and Activity details as required (refer to Add a New Activity for more details) and click on ***Save***.
- Or, return to the ***Customer page*** if you do not wish to make or save any changes.



CUSTOMER DETAILS

OPEN ACTIVITIES

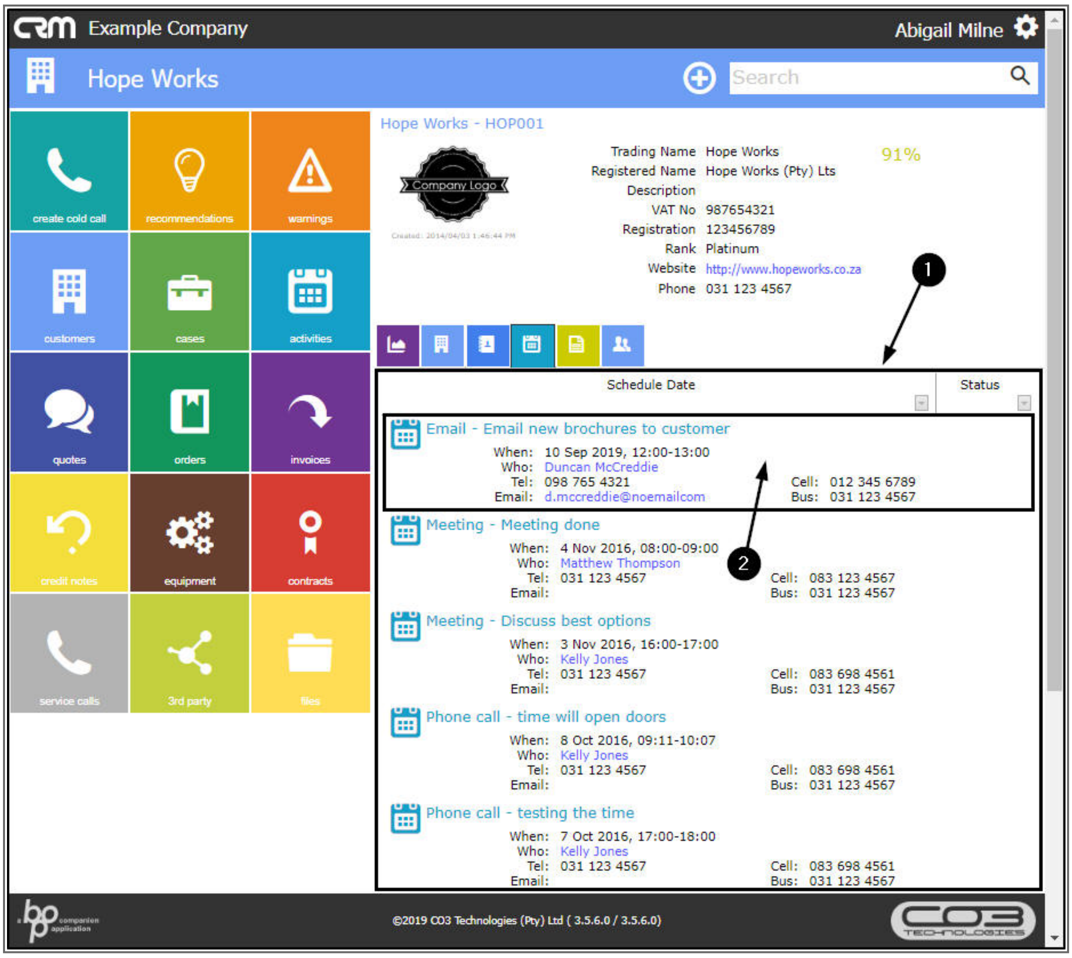
1. In the ***Customer page***,
2. Click on the ***Open Activities*** tile.



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

View the *Action* ***buttons***

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

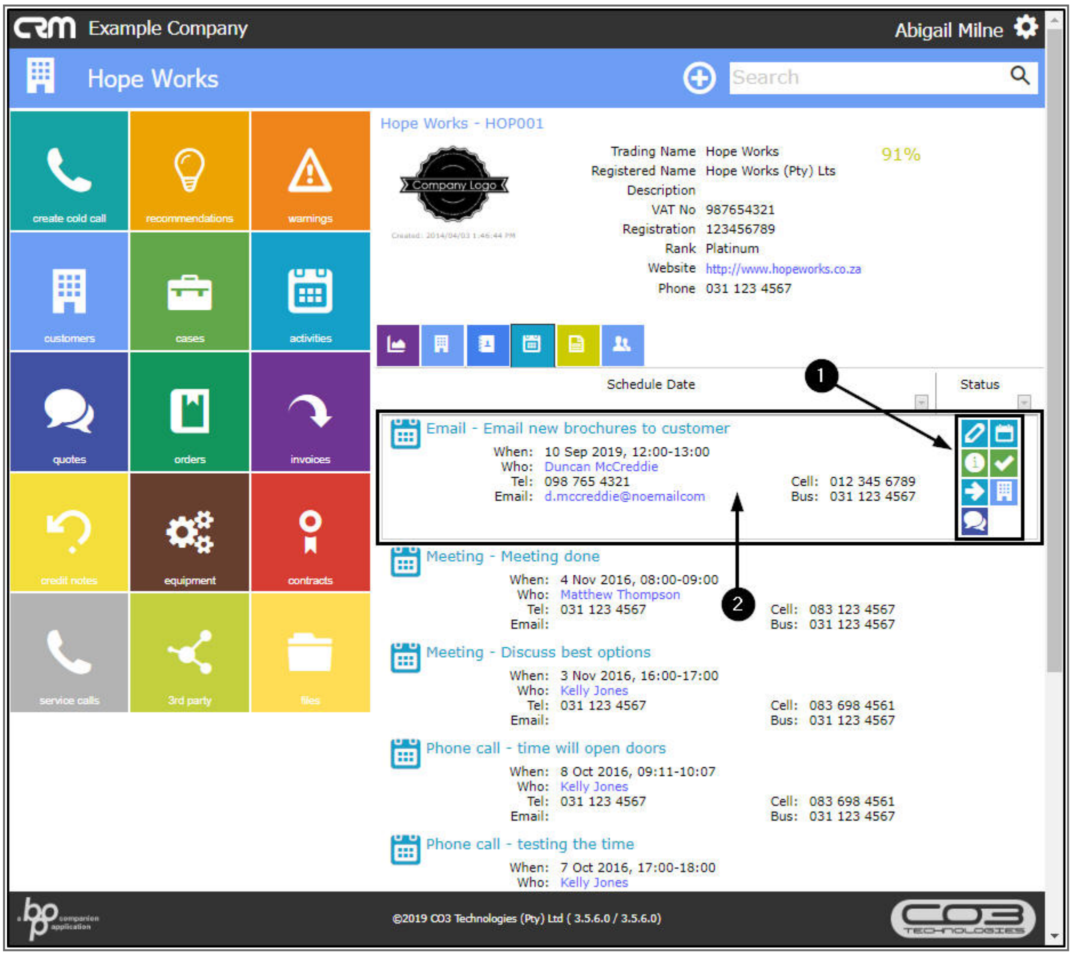


1. The customer Action buttons will be displayed.

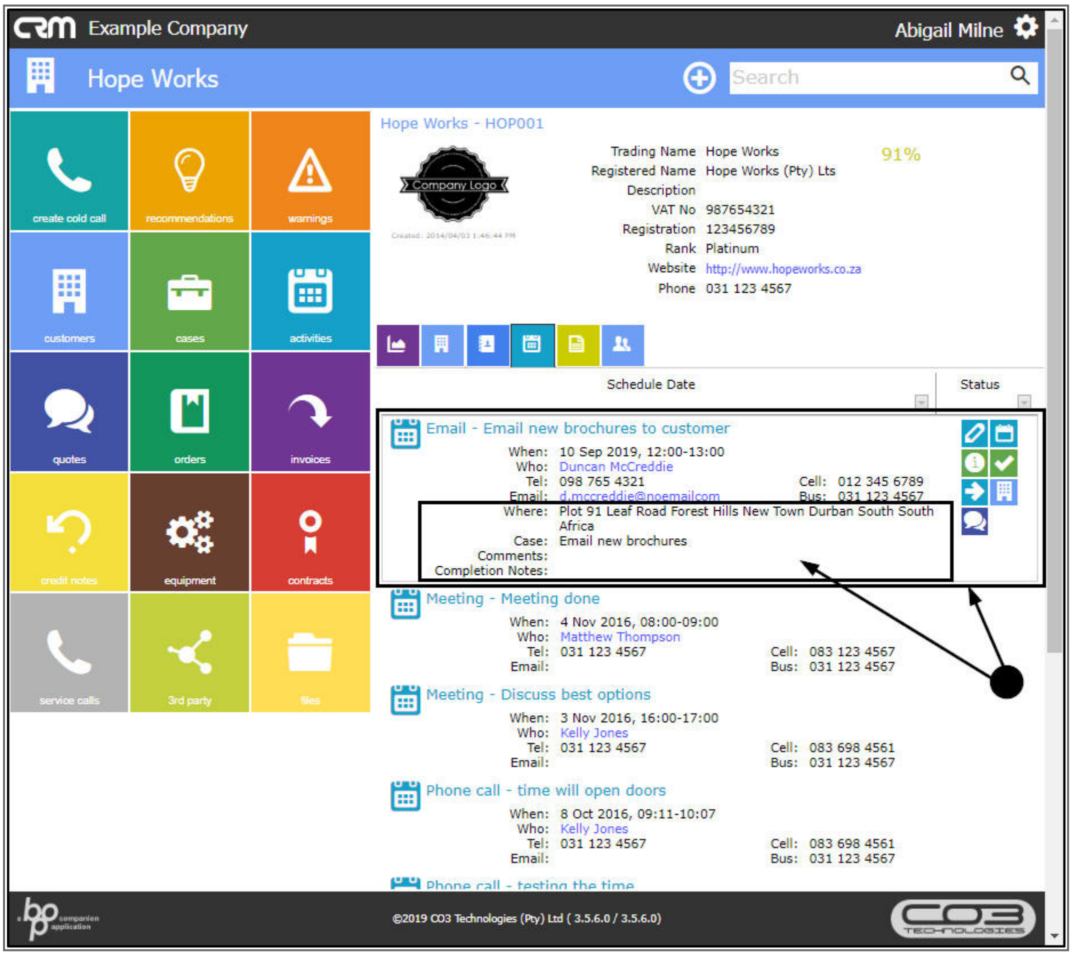
CONTACTS

EXPAND CONTACT DETAILS

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



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



NOTES

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

- 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.

VIEW SALESMAN/ADDITIONAL SALESMEN

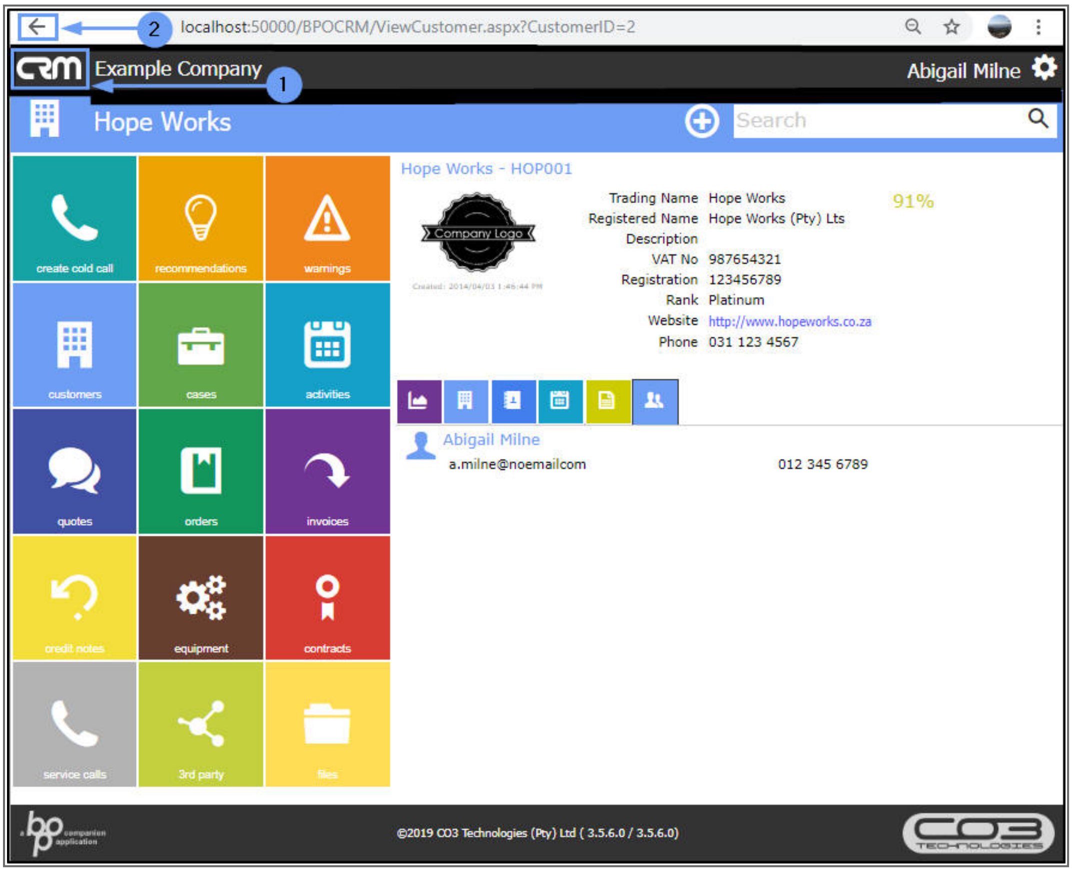
1. In the ***Customer home page***,
2. Click on the ***Salesmen*** tile.

- 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 Maintain Customer Salesmen.

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.


localhost:50000/BPOCRM/ViewCustomer.aspx?CustomerID=2
2
Example Company
1
Abigail Milne
Hope Works
Search
create cold call
recommendations
warnings
customers
cases
activities
quotes
orders
invoices
credit notes
equipment
contracts
service calls
3rd party
files
Hope Works - HOP001
Trading Name Hope Works
Registered Name Hope Works (Pty) Lts
Description
VAT No 987654321
Registration 123456789
Rank Platinum
Website http://www.hopeworks.co.za
Phone 031 123 4567
91%
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