

We are currently updating our site; thank you for your patience.

CRM BASICS

ADD A CONTACT

Each customer needs to have a **contact** , in order to:

- Call
- Send Emails
- Send Activity Notes

A customer must have a contact linked, who is set to **Receive Sales Calls**.

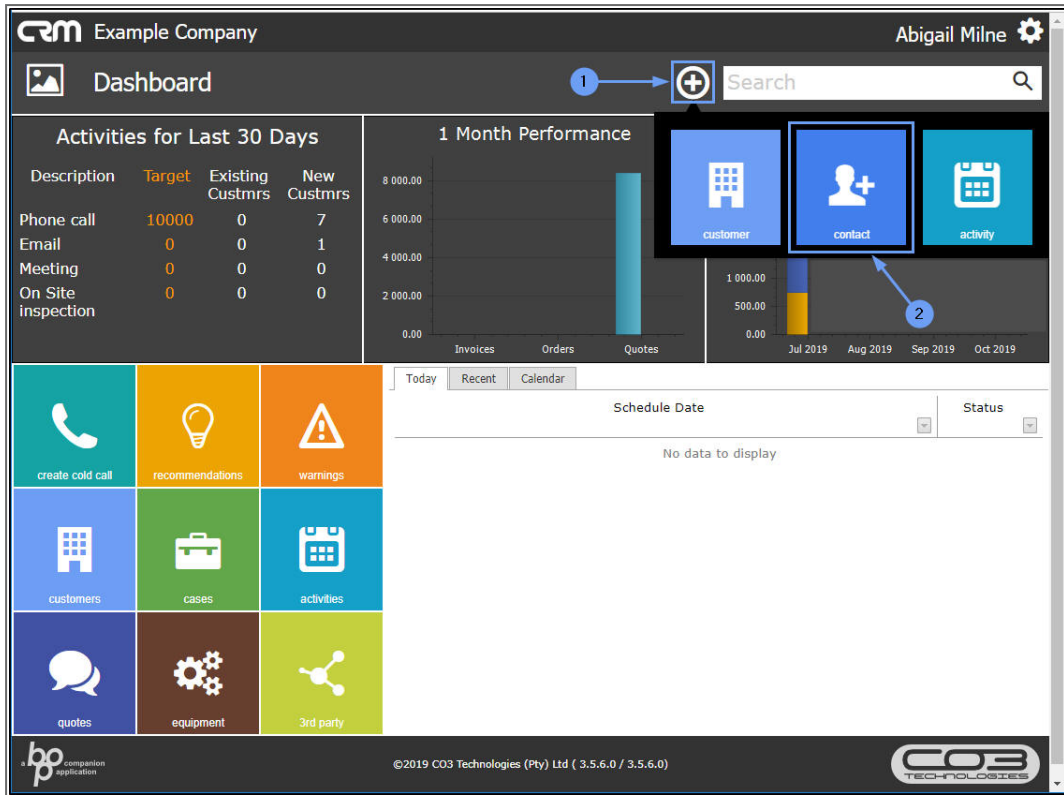
It is important to remember that additional contact people will need to be configured later within Nucleus Service:

- In order for a customer to be approved within BPO, an **Accounts Contact** is required. This contact will receive invoicing.
- Each customer should have a **Primary Contact**. This person will receive notifications regarding service call status changes.
- You can also [add a contact in the Save Customer page](#).

Access: Webpage - [http://\[servername\]:\[portno\]/BPOCRM/User.aspx](http://[servername]:[portno]/BPOCRM/User.aspx)

ADD NEW CONTACT FROM THE HOMEPAGE

- Click on the **Add new items...** icon.
- Click on the **Contact** tile.



CONTACT INFO MANDATORY FIELDS

1. The **Save Contact** screen will open with the **More Details** section automatically expanded to display the **Contact Info** frame.
2. Click in the mandatory fields [*] and type in the contact details.
 - **Note:** that only the **First Name** and **Last Name** fields are mandatory but you can add details to all the fields in this section if you have the information on hand.

Save Contact

- Customer

*** Customer Search**

Type new customer name or search for existing customer

- Customer Details

*** Name** The customer name
 Holding company -
 Type The customer type
 Main Salesman Salesman assigned to this
 Website The web site address
 Phone The phone number

Reg. No Registration number
 VAT No The VAT number
 Reporting Area The customer reporting area

*** Rank** Customer rank

+ More Details

- Contact Info

Title Title of contact
*** First Name** The contact's first name
*** Last Name** The contact's last name
Preferred A name the contact prefers
Other emails Other email addresses separated with semi-colons
Description Any narrative description
Birthday Birthday of contact

Telephone Telephone number
Mobile Mobile phone number
Email Email address
Fax Fax number

Address

Address Choose existing or enter new address

Post Code Post Code
Country Country...

Address Line 1

Address Line 1

Address Line 2

Address Line 2

Address Line 3

Address Line 3

Address Line 4

Address Line 4

Address Line 5

Address Line 5

CRM Info

*** Main Contact?** Is main sales contact?
CRM Role The contact type
 Send SMS
 Contact Picture

Contact Parent The manager
 Accepts Sales Calls
 Send Email

Submit Options

Show customer after save

CUSTOMER SEARCH

NEW CUSTOMER

If you are adding the contact details for a **new** customer:

1. Go to the **Customer** frame, click in the **Customer Search** field and type in the new customer name.
2. Go to the **Customer Details** frame. As you click anywhere in this frame, the **Name** field will auto populate with the same text that was typed into the **Customer Search** field.
3. Click in the **Rank** field and select from the drop-down list the Rank **Call Cycle** for this new customer (e.g. **Platinum** Rank = the call cycle for this customer is every **15** days).

Rank is based on how much you **value** this customer and helps to define the call cycle per client. For example, a **Wood** ranking indicates that you will only contact this customer every **365** days - this customer is not valuable to you. However a **Platinum** ranking indicates that this is a very important customer that you wish to maintain a good relationship with, therefore you will contact them every **15** days.

Each customer must be linked to a Rank in CRM. **Customer Rank** can also be linked in the Customer Maintenance screen in Nucleus Service.

The above mentioned fields are mandatory [*] but you can add details to all the fields in these frames if you have the information on hand.

The screenshot shows a web browser window with the URL `localhost:50000/BPOCRM/MaintainContact.aspx?CustomerID=0&NewContact=true&customer-name=2&customer_info=2&Co...`. The page title is "Save Contact" and the user is "Abigail Milne". The form is titled "Save Contact" and has a "Save" button at the bottom right.

The form is divided into several sections:

- Customer:** Includes a "Customer Search" dropdown (callout 1).
- Customer Details:** Includes "Name" (callout 2), "Holding company", "Type", "Main Salesman", "Website", "Phone", "Reg. No.", "VAT No.", "Reporting Area", and "Rank" (callout 3).
- Contact Info:** Includes "Title", "First Name" (Jason), "Last Name" (King), "Preferred", "Other emails", "Description", "Telephone", "Mobile", "Email", and "Fax".
- Address:** Includes "Address", "Address Line 1-5", "Post Code", and "Country".
- CRM Info:** Includes "Main Contact?", "CRM Role", "Send SMS", "Contact Picture" (with a "Browse..." button), "Contact Parent", "Accepts Sales Calls" (checked), and "Send Email".
- Submit Options:** Includes "Show customer after save" (checked).

CURRENT CUSTOMER

If you are adding the contact details for a **current** customer:

1. Hover over the **Customer Search** field, a drop-down arrow will be revealed. Click on this arrow to display a list of all the customers on the system.
2. Select the relevant customer to be linked to the new contact.

The screenshot shows the 'Save Contact' form in a CRM system. The 'Customer Search' field is active, and a dropdown menu is open, displaying a list of customers. The dropdown menu has the following data:

Code	Name	Status
JOE0001	Joes Carpentry Shop	New - CRM
JUD0001	Judes Jewels	New - CRM
JUS001	Just In Time	Active
KIN0001	King Copiers	New - CRM
KIN0002	King Enterprises	New - CRM
LIB0001	Liberty Jones	New - CRM
LIT0001	Little Bee Honey	Active

The form also includes fields for Contact Info (Title, First Name, Last Name, Preferred, Other emails, Description, Birthday), Address (Address, Address Line 1-5, Post Code, Country), CRM Info (Main Contact?, CRM Role, Send SMS, Contact Picture, Contact Parent, Accepts Sales Calls, Send Email), and Submit Options (Show customer after save).

SELECT AN ADDRESS

If this is a current customer already loaded into CRM, you can select an **address**.

1. Hover over the **Address** field, a drop-down arrow will be revealed. Click on this arrow to display a list of all the shipping addresses linked to this customer.
2. Select the relevant address to be linked to the new contact.

The screenshot shows the 'Save Contact' form for a customer named 'King Enterprises'. The form is divided into several sections: Customer, Customer Details, Contact Info, Address, CRM Info, and Submit Options. The 'Address' section is currently active, and a dropdown menu is open, showing a list of existing shipping addresses. A 'New' button is visible in the dropdown. Arrows point to the 'New' button (1) and the 'Main Contact?' checkbox (2).

Type	Line 1	Line 2	Line 3	Line 4	Line 5	Post Code	Country
New							
SHIP	1 Richmond Street	Richmond Town	Richmond City			RICH01	South Africa
SHIP	2 Upton Road	Upton Town	Upton City			UPT01	South Africa
SHIP	1 Downton Street	Downton Town	Downton City			DOW001	South Africa

CREATE A NEW ADDRESS

If the new contact address is not on this list:

1. As you click in the **Address** field ensure that you select **New**.

CRM Example Company
Abigail Milne

+ Save Contact ←

- Customer
* Customer Search King Enterprises

- Customer Details

* Name King Enterprises

Holding company

Type Legal

Main Salesman Abigail Milne

Website www.kingenterprises.co.za

Phone 0123456789

Reg. No 01020304

VAT No 111222333

Reporting Area Durban

* Rank Silver (Call cycle: 60)

+ More Details

- Contact Info

Title Title of contact

* First Name Jason

* Last Name King

Preferred A name the contact prefers

Other emails Other email addresses separated with semi-colons

Description Any natural description

Birthday Birthday of contact

Telephone Telephone number

Mobile Mobile phone number

Email Email address

Fax Fax number

Address

Address New

Type	Line 1	Line 2	Line 3	Line 4	Line 5	Post Code	Country
	New						
SHIP	1 Richmond Street	Richmond Town	Richmond City			RJCH01	South Africa
SHIP	2 Upton Road	Upton Town	Upton City			UPT01	South Africa
SHIP	1 Downton Street	Downton Town	Downton City			DOW001	South Africa
	Address Line 5 Address Line 5						

CRM Info

* Main Contact? ! Is main sales contact?

CRM Role The contact type

Send SMS

Contact Picture Browse...

Contact Parent The manager

Accepts Sales Calls

Send Email

Submit Options

Show customer after save

Save

1. With **New** selected,
2. You can now type in the new address in all the relevant fields

CRM Example Company
Abigail Milne

+ Save Contact ←

- Customer
* Customer Search King Enterprises

- Customer Details

* Name King Enterprises

Holding company

Type Legal

Main Salesman Abigail Milne

Website www.kingenterprises.co.za

Phone 0123456789

Reg. No 01020304

VAT No 111222333

Reporting Area Durban

* Rank Silver (Call cycle: 60)

+ More Details

- Contact Info

Title Title of contact

* First Name Jason

* Last Name King

Preferred A name the contact prefers

Other emails Other email addresses separated with semi-colons

Description Any narrative description

Birthdays Birthdays of contact

Telephone Telephone number

Mobile Mobile phone number

Email Email address

Fax Fax number

Address

Address New

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Address Line 5

Post Code

Country

CRM Info

* Main Contact? ! Is main sales contact?

CRM Role The contact type

Send SMS

Contact Picture Browse...

Contact Parent The manager

Accepts Sales Calls

Send Email

Submit Options

Show customer after save

Save

THE 'CRM INFO' FRAME.

Move down the page to the **CRM Info** frame.

MAIN CONTACT

1. Hover over the **Main Contact** field to reveal a drop-down arrow. Click on this arrow to display a drop-down list with the options: **Yes** and **No**.
2. In this example, **Yes** is selected.

CRM Example Company
Abigail Milne

+ Save Contact ←

- Customer * Customer Search King Enterprises

- Customer Details

* Name King Enterprises

Holding company

Type Legal

Main Salesman Abigail Milne

Website www.kingenterprises.co.za

Phone 0123456789

Reg. No 01020304

VAT No 111222333

Reporting Area Durban

+ More Details

* Rank Silver (Call cycle: 60)

- Contact Info

Title Title of contact

* First Name Jason

* Last Name King

Preferred A name the contact prefers

Other emails Other email addresses separated with semi-colons

Description Any narrative description

Telephone Telephone number

Mobile Mobile phone number

Email Email address

Fax Fax number

Address

Address New

Address Line 1 10 Main Road

Address Line 2 Main Town

Address Line 3 Main City

Address Line 4 KZN

Address Line 5 Address Line 5

CRM Info

* Main Contact? 1

CRM Role Yes No

Send SMS

Contact Picture 2

Post Code MAIN001

Country South Africa

Contact Parent The manager

Accepts Sales Calls

Send Email

Submit Options

Show customer after save

CRM ROLE

1. Hover over the **CRM Role** field to reveal a drop-down arrow. Click on this arrow to display a **Contact Type/Role** list.
2. Select from this list the specific role that this contact holds in their company. In this example, **Buying Officer** is selected.

CRM Example Company
Abigail Milne

Save Contact

Customer	* Customer Search King Enterprises	
Customer Details	* Name King Enterprises Holding company Type Legal Main Salesman Abigail Milne Website www.kingenterprises.co.za Phone 0123456789 Reg. No 01020304 VAT No 111222333 Reporting Area Durban * Rank Silver (Call cycle: 60)	
+ More Details		
Contact Info	Title Title of contact * First Name Jason * Last Name King Preferred A name the contact prefers Other emails Other email addresses separated with semi-colons Description Any narrative description Telephone Telephone number Mobile Mobile phone number Email Email address Fax Fax number	
Address	Birthday Birthday of contact Address New Address Line 1 10 Main Road Address Line 2 Main Town Address Line 3 Main City Address Line 4 KZN Address Line 5 Address Line 5 Post Code MAIN001 Country South Africa	
CRM Info	* Main Contact? Yes CRM Role <input type="checkbox"/> Send SMS <input type="checkbox"/> Contact Picture Contact Parent The manager Accepts Sales Calls <input checked="" type="checkbox"/> Send Email <input type="checkbox"/>	
Submit Options	Show customer after save	

1. **Send SMS** : Select this check box if this contact accepts SMS communication.
2. **Accept Sales Calls** : Select this check box if this contact accepts sales calls.
 - **Note** : This check box is auto selected by the system, you can un-check it, if required.
3. **Send Email** : Select this check box if this contact accepts Email communication.

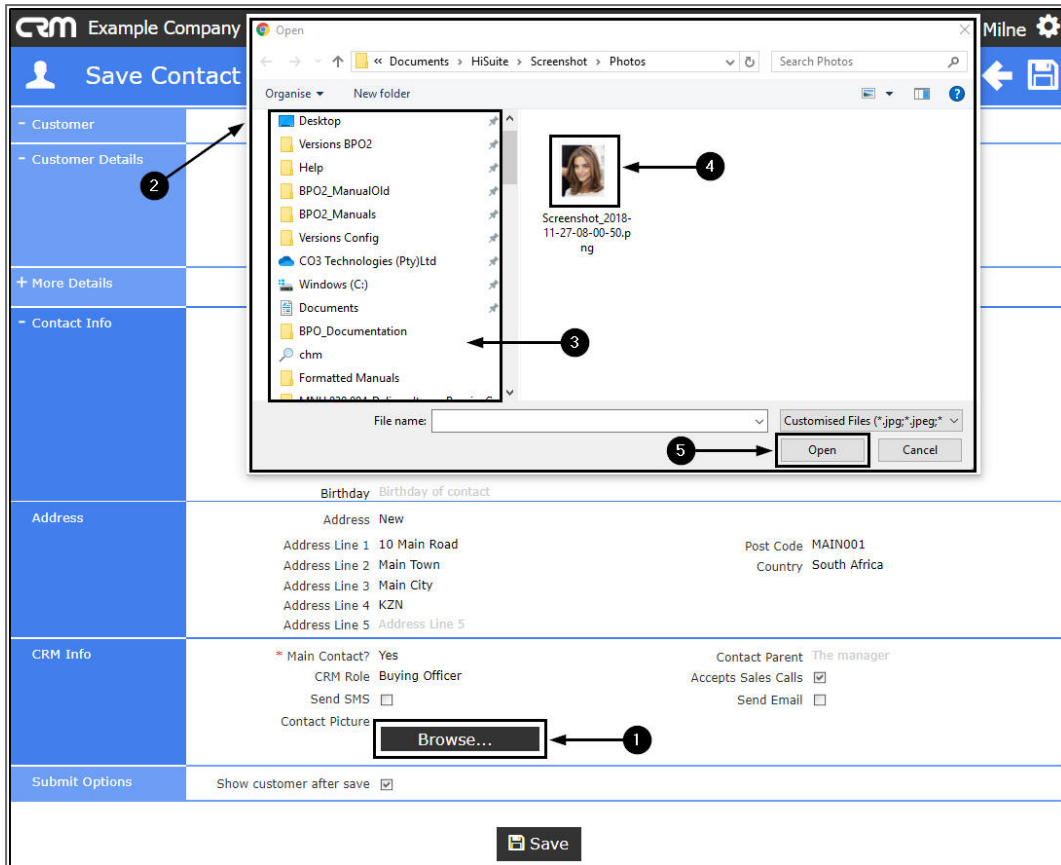
CRM Example Company
Abigail Milne

Save Contact

Customer	* Customer Search King Enterprises
Customer Details	* Name King Enterprises Holding company Type Legal Main Salesman Abigail Milne Website www.kingenterprises.coza Phone 0123456789 Reg. No 01020304 VAT No 111222333 Reporting Area Durban * Rank Silver (Call cycle: 60)
+ More Details	
Contact Info	Title Title of contact * First Name Jason * Last Name King Preferred A name the contact prefers Other emails Other email addresses separated with semi-colons Description Any narrative description Telephone Telephone number Mobile Mobile phone number Email Email address Fax Fax number Birthday Birthday of contact
Address	Address New Address Line 1 10 Main Road Address Line 2 Main Town Address Line 3 Main City Address Line 4 KZN Address Line 5 Address Line 5 Post Code MAIN001 Country South Africa
CRM Info	* Main Contact? Yes CRM Role Buying Officer Send SMS <input type="checkbox"/> 1 Contact Picture <input type="button" value="Browse..."/> Contact Parent The manager Accepts Sales Calls <input checked="" type="checkbox"/> 2 Send Email <input type="checkbox"/> 3
Submit Options	Show customer after save <input checked="" type="checkbox"/>

LINK A CONTACT PICTURE

1. Click on **Browse...**
2. An **Open** screen will pop up.
3. Double click on the file that contains the image.
4. Click on the image.
5. Click on **Open**.



1. The contact picture will be inserted into this **CRM Info** frame

CONTACT PARENT

2. Click in this field and type in the **'report to'** person for this contact e.g. the Buying Manager

- Note:** If there are Contact Parents set up against this customer, a drop-down arrow will appear as you hover over this field. Click on this arrow to display a list of contact parents from which you can make a selection.

CRM Example Company
Abigail Milne

Save Contact

Customer	* Customer Search King Enterprises
Customer Details	* Name King Enterprises Holding company Type Legal Main Salesman Abigail Milne Website www.kingenterprises.co.za Phone 0123456789 Reg. No 01020304 VAT No 111222333 Reporting Area Durban * Rank Silver (Call cycle: 60)
+ More Details	
Contact Info	Title Title of contact * First Name Jason * Last Name King Preferred A name the contact prefers Other emails Other email addresses separated with semi-colons Description Any narrative description Birthday <input checked="" type="checkbox"/> birthday of contact
Address	Address New Address Line 1 10 Main Road Address Line 2 Main Town Address Line 3 Main City Address Line 4 KZN Address Line 5 Address Line 5 Post Code MAIN001 Country South Africa
CRM Info	* Main Contact? Yes CRM Role Buying Officer Send SMS <input type="checkbox"/> Contact Picture <input type="text"/> Contact Parent The manager Accepts Sales Calls <input checked="" type="checkbox"/> Send Email <input type="checkbox"/>
Submit Options	Show customer after save <input checked="" type="checkbox"/>

Save

SUBMIT OPTIONS

SHOW CUSTOMER AFTER SAVE

1. This check box is auto selected. You can un-select it if you do not wish to view the customer details in the Homepage after you have saved this contact.

SAVE NEW CONTACT

2. Click on **Save**.

CRM Example Company
Abigail Milne

Save Contact

- Customer	* Customer Search King Enterprises
- Customer Details	* Name King Enterprises Holding company Type Legal Main Salesman Abigail Milne Website www.kingenterprises.coza Phone 0123456789 Reg. No 01020304 VAT No 111222333 Reporting Area Durban * Rank Silver (Call cycle: 60)
+ More Details	
- Contact Info	Title Title of contact * First Name Jason * Last Name King Preferred A name the contact prefers Other emails Other email addresses separated with semi-colons Description Any narrative description Telephone Telephone number Mobile Mobile phone number Email Email address Fax Fax number Birthday Birthday of contact
Address	Address New Address Line 1 10 Main Road Address Line 2 Main Town Address Line 3 Main City Address Line 4 KZN Address Line 5 Address Line 5 Post Code MAIN001 Country South Africa
CRM Info	* Main Contact? Yes CRM Role Buying Officer Send SMS <input type="checkbox"/> Contact Picture <input type="button" value="Browse..."/> Contact Parent The manager Accepts Sales Calls <input checked="" type="checkbox"/> Send Email <input type="checkbox"/>
Submit Options	Show customer after save <input checked="" type="checkbox"/>

Save

1. You will either return to the Homepage or Customer Homepage depending on your selection in the previous step.
2. If you selected to 'Show Customer After Save', then you will now be able to view the customer details (e.g. 12 Months Sales History) in this screen as well as customer-specific tiles that are not available in the Main Homepage.

CRM Example Company | Abigail Milne

Customer Dashboard [1]

Search [+] [Q]

Description	Target	Existing Custmrs	New Custmrs
Phone call	10000	0	7
Email	0	0	1
Meeting	0	0	0
On Site inspection	0	0	0

1 Month Performance

Bar chart showing performance for Invoices, Orders, and Quotes.

4 Month Pipeline

Bar chart showing pipeline for Jul 2019, Aug 2019, Sep 2019, and Oct 2019.

King Enterprises - KIN0002

Trading Name: King Enterprises
Registered Name: King Enterprises
Description: Solicitors Firm, 3 sites.
VAT No: 111222333
Registration: 01020304
Rank: Silver
Website: <http://www.kingenterprises.co.za>
Phone: 0123456789

50%

12 Months Sales History

Line chart showing Contract Income and Sales Revenue from July 2018 to July 2019.

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CRM.000.005

