

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

CRM BASICS

SALES PERFORMANCE SUMMARY

The CRM Performance Summary will indicate your Sales Target vs. Actual over a monthly period.

This time frame can be configured in BPO according to your company requirements and split between current BPO clients and New Customers.

The Performance Types are:

- Cases
- Quotes
- Orders
- Invoices

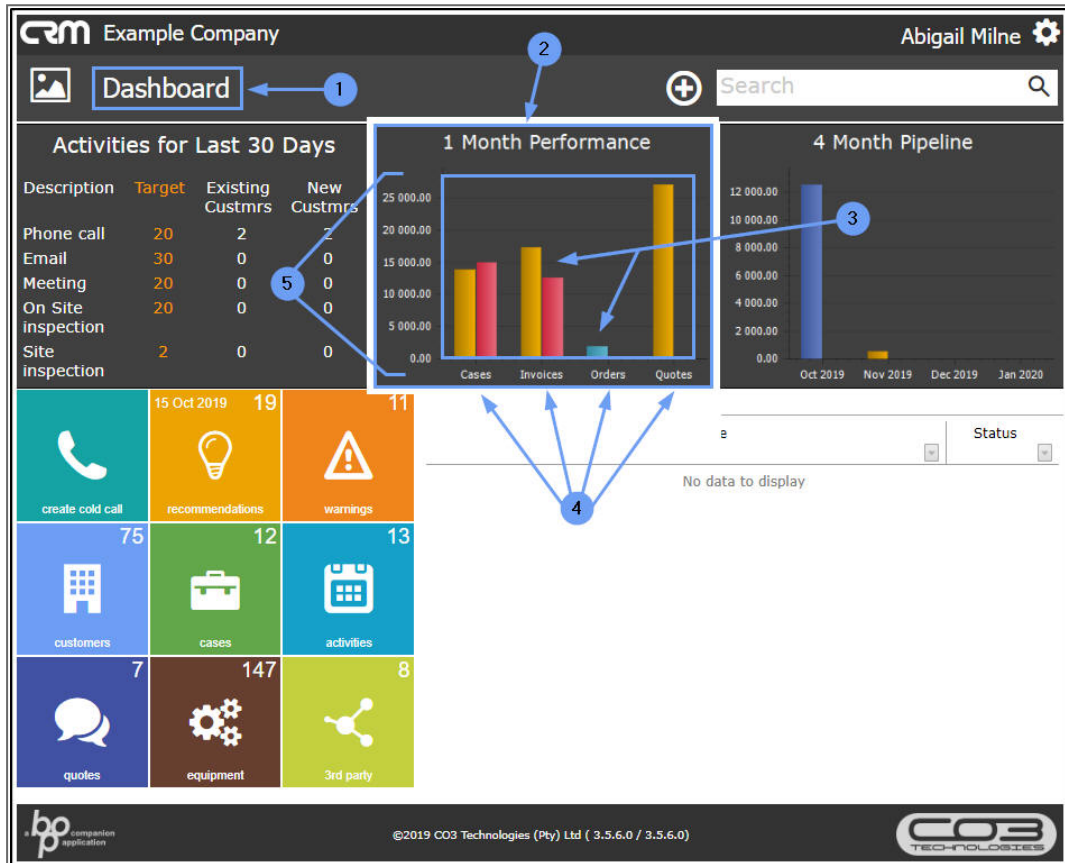
Ribbon Access: Webpage - [http://\[servername\]:\[port-no\]/BPOCRM/User.aspx](http://[servername]:[port-no]/BPOCRM/User.aspx)

VIEW PERFORMANCE SUMMARY IN THE HOME PAGE

1. In the CRM **Homepage**,
2. You can view the [] **Month Performance** frame.
Note: The amount of months that you can view in this frame is configured in BPO.
3. This frame will contain bars of up to 3 colours, reflecting the number of:

- **New** (orange)
- **Existing** (blue) and

- **Target** (pink) customers per performance type.
- The Performance types are represented on the horizontal axis:
 - **Cases**,
 - **Invoices**,
 - **Orders** and
 - **Quotes**.
 - The values are represented on the vertical axis.



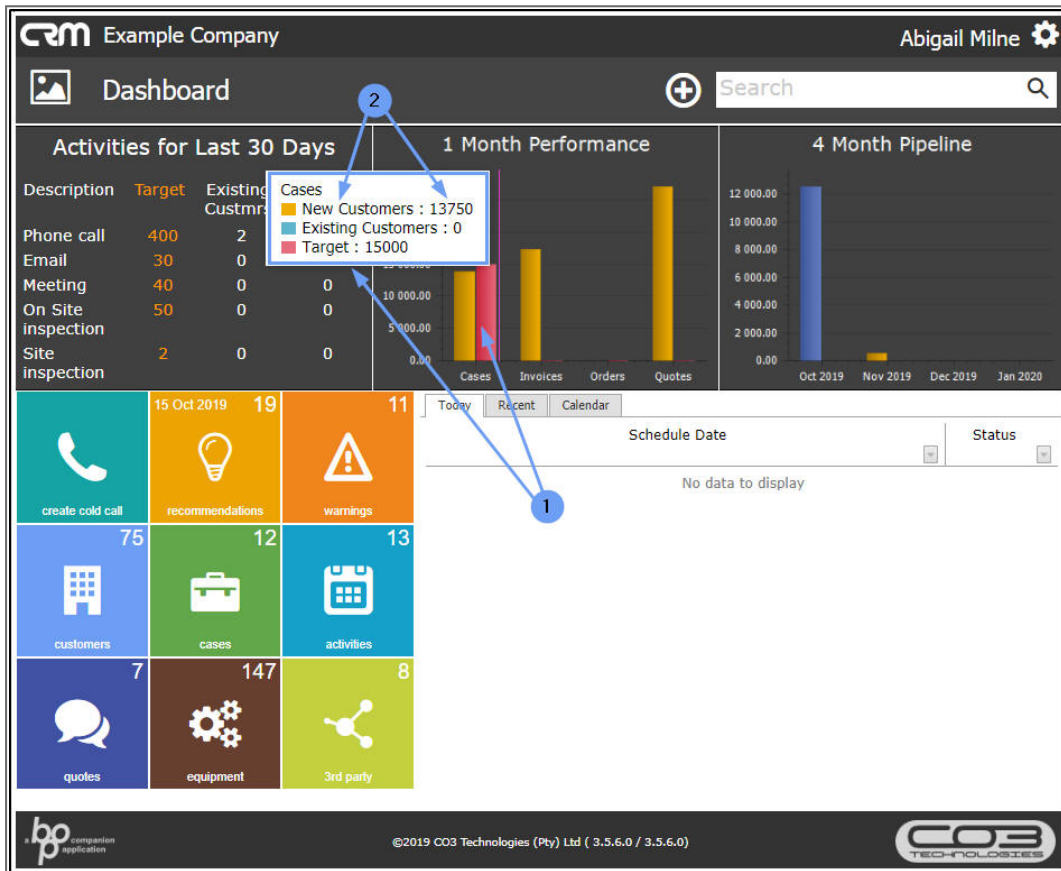
VIEW CASES MONTH PERFORMANCE

- Hover over the **Cases** section of the bar chart to bring up the Cases information box.
- Each type of Case value will be listed:

- New **Customers**:
- Existing **Customers**:
- Target:

with their corresponding **amount**.

- In this example, the New customers have a total caseload value of **13750**, the Existing customers currently have **zero** caseload value, the Target for this salesman is a total caseload value of **15000** per 1 month.



VIEW INVOICES MONTH PERFORMANCE

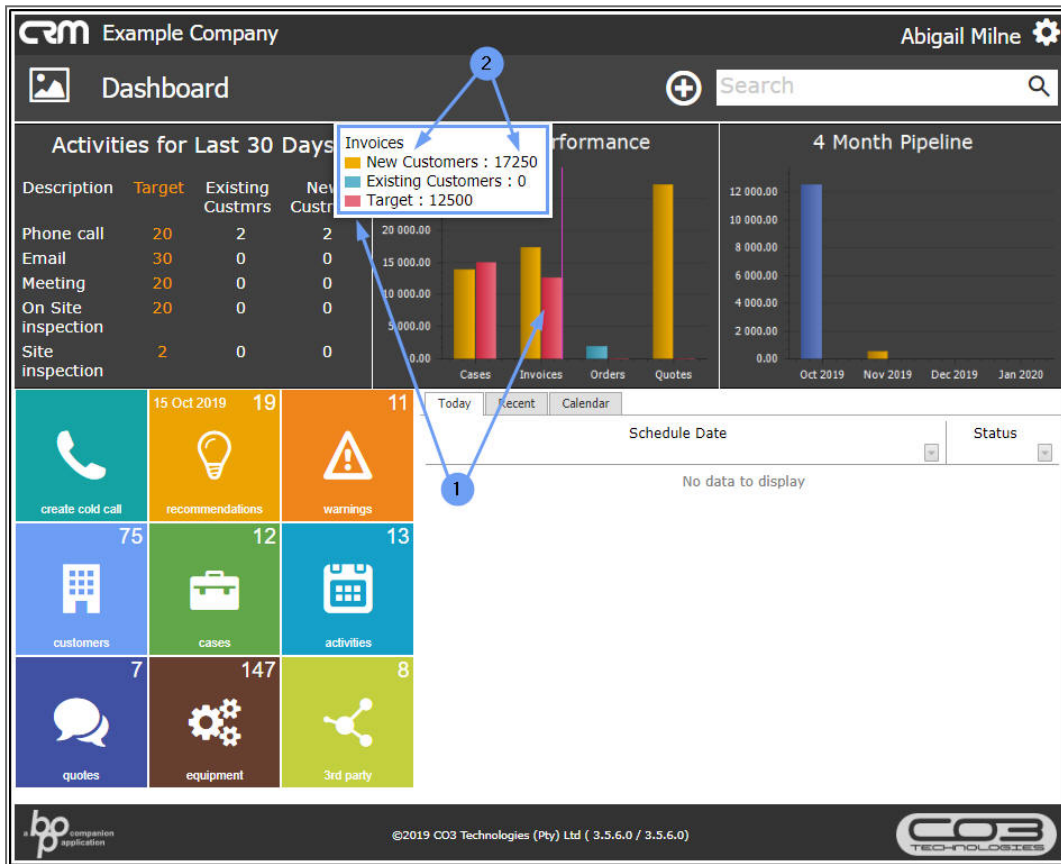
1. Hover over the **Invoices** section of the bar chart to bring up the Invoices information box.

2. Each type of Invoice value will be listed:

- New **Customers**:
- Existing **Customers**:
- Target:

with their corresponding **amount**.

- In this example, the New customers have a total invoice value of **17250**, the Existing customers currently have **0 (zero)** invoice value, the Target for this salesman is a total invoice value of **12500** per **1** month.

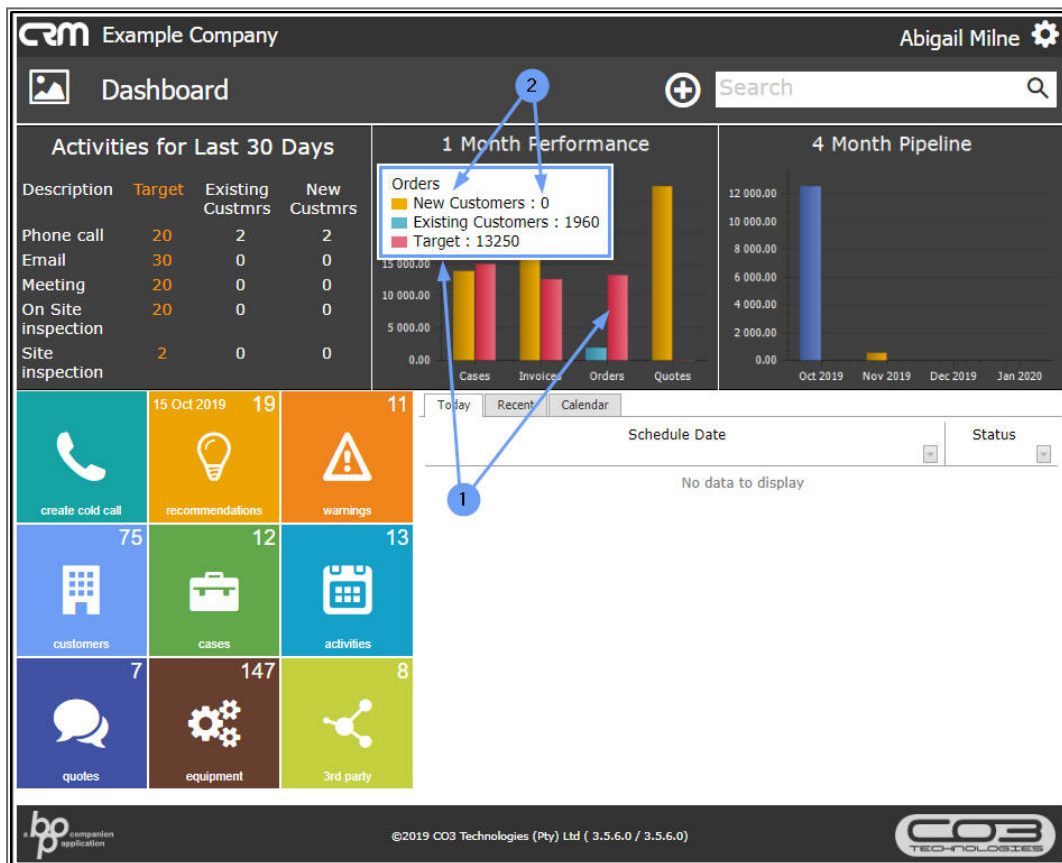


VIEW ORDERS MONTH PERFORMANCE

1. Hover over the **Orders** section of the bar chart to bring up the Orders information box.
2. Each type of Order value will be listed:
 - New **Customers**:
 - Existing **Customers**:
 - **Target**:

with their corresponding **amount**.

- In this example, the New customers have a total order value of **0 (zero)**, the Existing customers currently have **1960** order value, the Target for this salesman is a total order value of **13250** per 1 month.

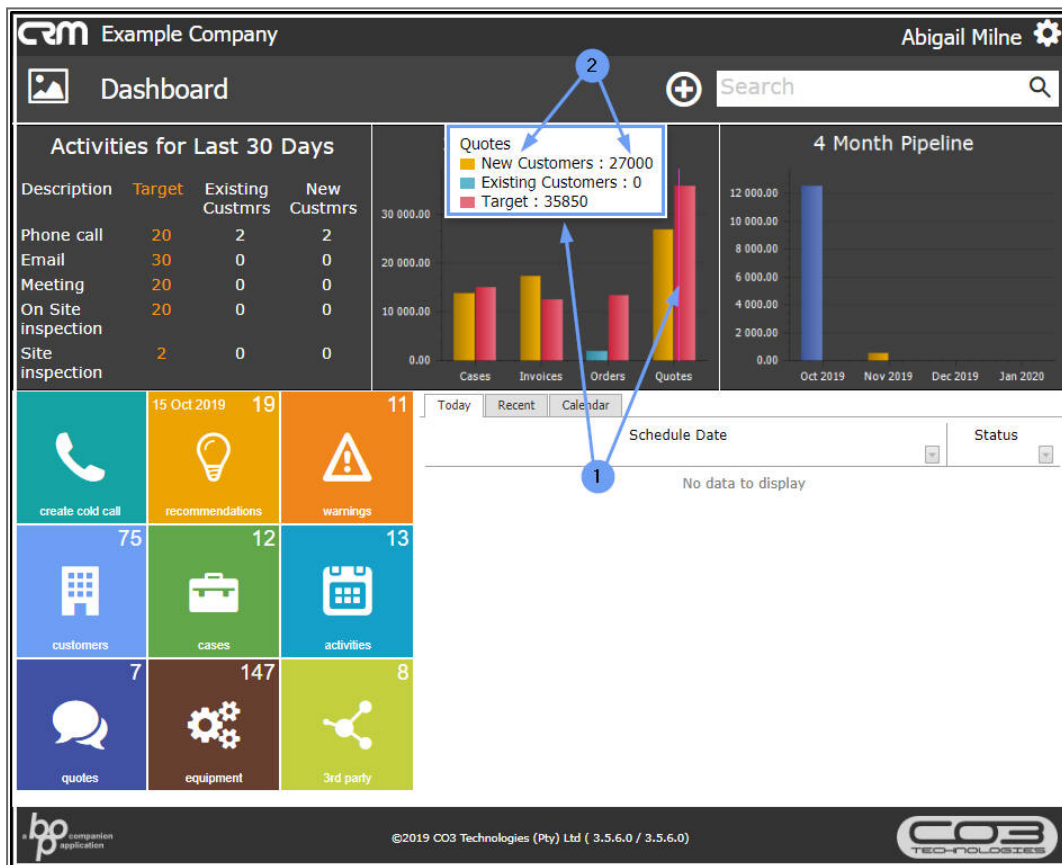


VIEW QUOTES MONTH PERFORMANCE

1. Hover over the **Quotes** section of the bar chart to bring up the Quotes information box.
2. Each type of Quote value will be listed:
 - New **Customers**:
 - Existing **Customers**:
 - Target:

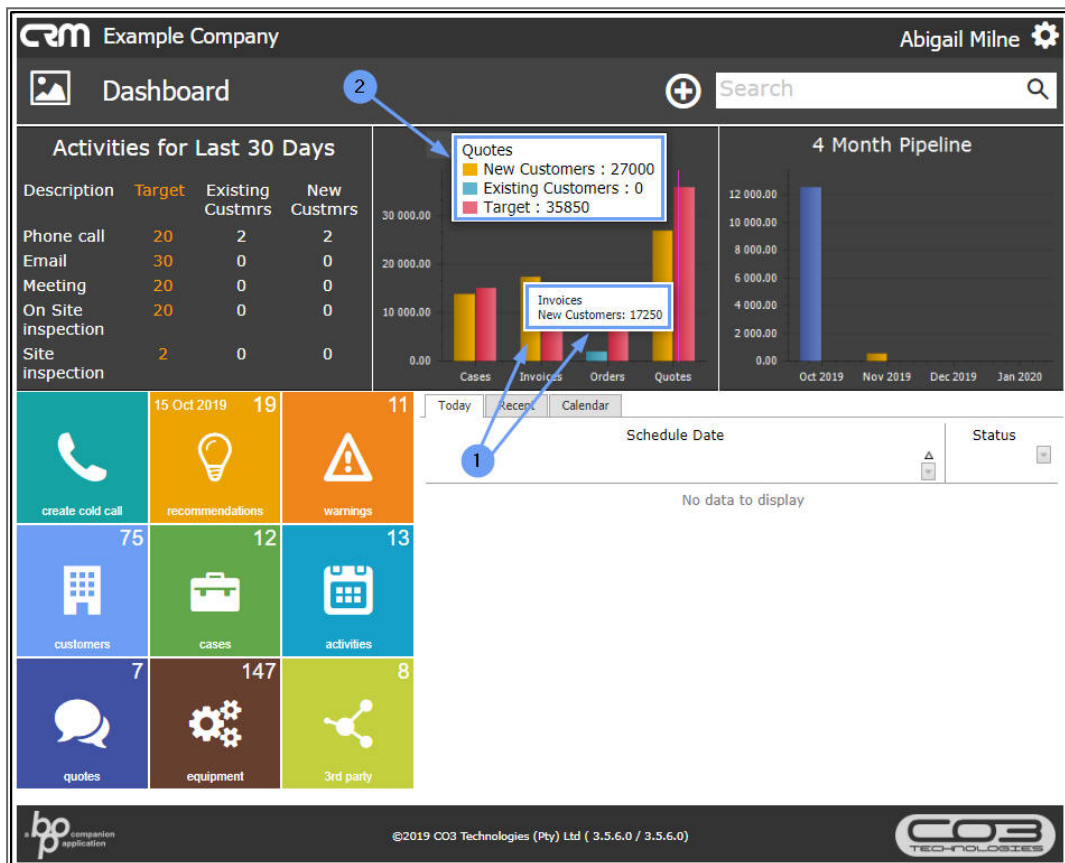
with their corresponding **amount**.

- In this example, the New customers have a total quote value of **27000**, the Existing customers currently have **0 (zero)** quote value, the Target for this salesman is a total quote value of **35850** per 1 month.



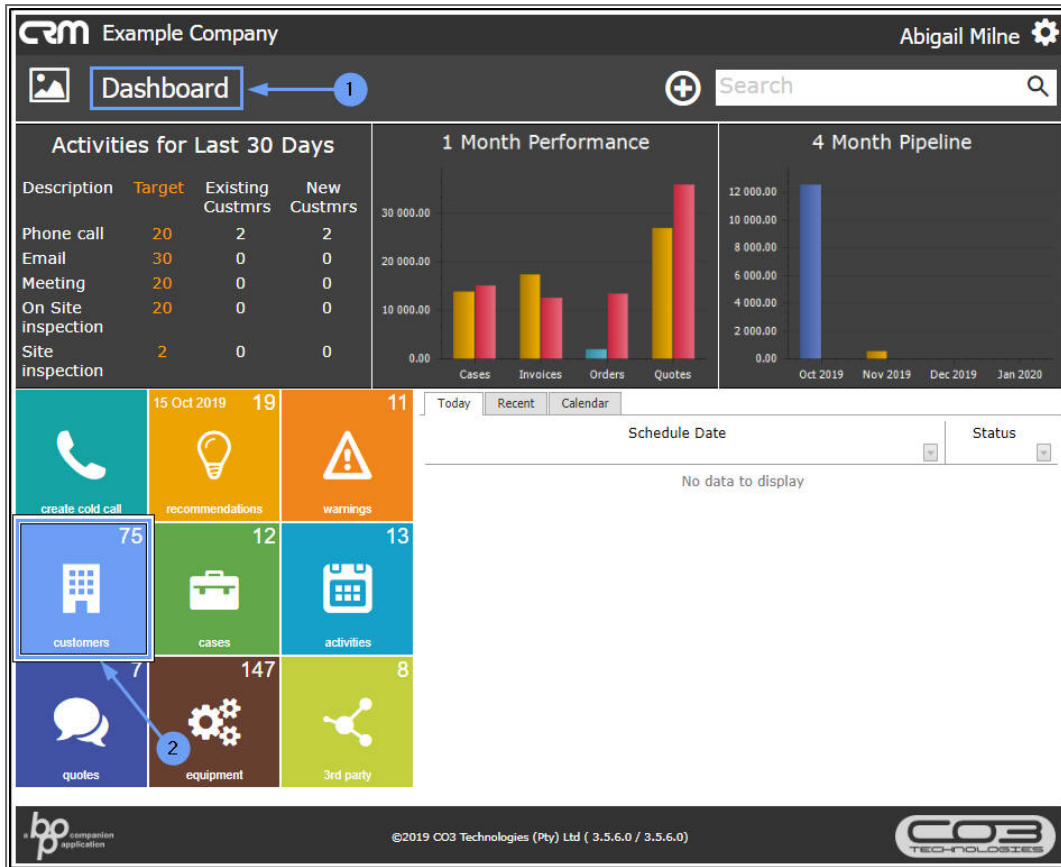
VIEW INDIVIDUAL PERFORMANCE TYPE SUMMARY

1. **Single click** on any individual bar in the chart to display an information box for that particular performance type and customer type.
 - In this example, the **Invoices: New Customers** type bar was selected.
2. You will still be able to hover over other parts of the bar chart to bring up to bring up the relevant performance type information box.



VIEW PERFORMANCE SUMMARY IN THE CUSTOMER HOMEPAGE

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



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

View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
?	ABC SHoe Co	ABCXYZ12				8%	Active	Gold	Yes	No
?	ABI Goods	ABI0001	Lucy	0810235036		50%	New - CRM	Metal	No	Yes
?	Another new customer	ANO0001				8%	Active		No	No
?	Apple Juice Inc	APP0001	Duncan McCreddie			50%	Active	Gold	Yes	Yes
?	Bearing and Shoe	BEA001				25%	Active	Metal	No	No
?	Bernies Builders	BER0001				8%	Active		No	No
?	Betties Summer Shop at the Beach	BET0001	Bettie Summervel	031 123 456		50%	Active	Gold	No	Yes
?	Big Bargains	BIG0001				8%	Active		Yes	No
?	Billys Barn	BIL0001				8%	Active		No	No
?	Bits and Bytes	BIT001				8%	Active		No	No

Page 1 of 8 (74 items) [1] 2 3 4 5 6 7 8 [All] Page size: 10

1. The selected **Customer** homepage will open.
2. Here you can view the [] **Month Performance** chart.

You can follow the same processes as set out above to:

- View the [Cases](#) Performance Summary
- View the [Invoices](#) Performance Summary
- View the [Orders](#) Performance Summary
- View the [Quotes](#) Performance Summary
- View the [Individual](#) Performance Type Summary

CRM Example Company
Abigail Milne

ABI Goods

1
2

+

🔍

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Phone call	20	2	2
Email	30	0	0
Meeting	20	0	0
On Site inspection	20	0	0
Site inspection	2	0	0

1 Month Performance

4 Month Pipeline

create cold call

recommendations

warnings

customers

cases

activities

quotes

orders

invoices

credit notes

equipment

contracts

ABI Goods - ABI0001

?

Created: 2019/06/19 3:23:50 PM

Trading Name ABI Goods 50%

Registered Name ABI Goods

Description

VAT No

Rank Metal

Website <http://>

Phone 0810235036

12 Months Sales History

companion application

©2019 CO3 Technologies (Pty) Ltd (3.5.6.0 / 3.5.6.0)

CRM.000.008

Help v2024.5.0.7/1.0 - Pg 10 - Printed: 21/08/2024

CO3 Technologies (Pty) Ltd © Company Confidential