

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

CRM BASICS

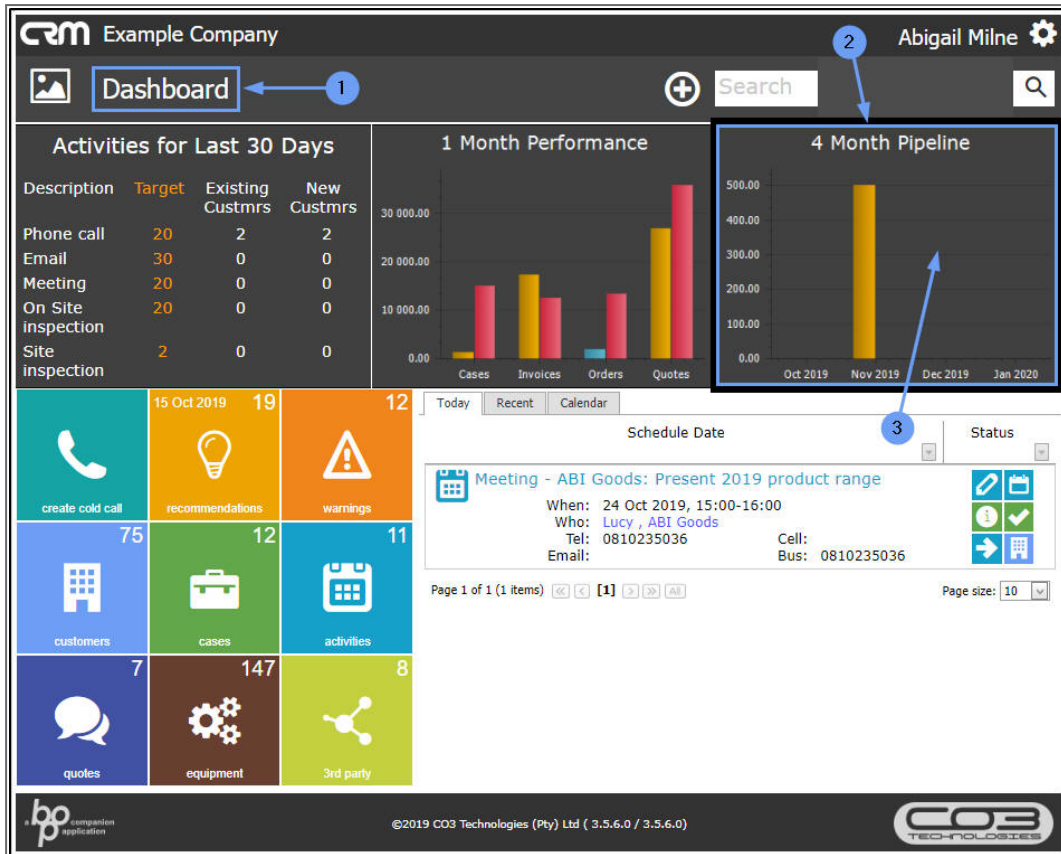
3 MONTH PIPELINE SUMMARY

In this frame you can view a graph of your Pipeline based on your active Cases. Pipeline months are set to 3 months by default, but this can be con-figured as per your company requirements. VAT is not displayed in the pipeline.

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

VIEW PIPELINE IN HOMEPAGE

1. In the CRM **Homepage**,
2. you can view the [] **Month Pipeline** frame.
 - **Note:** Pipeline months are set to 3 months by default, but can be configured as per your company requirements. In this example, the pipeline months have been set to **4**.
3. Click anywhere in this frame.



VIEW PIPELINE REPORT PAGE

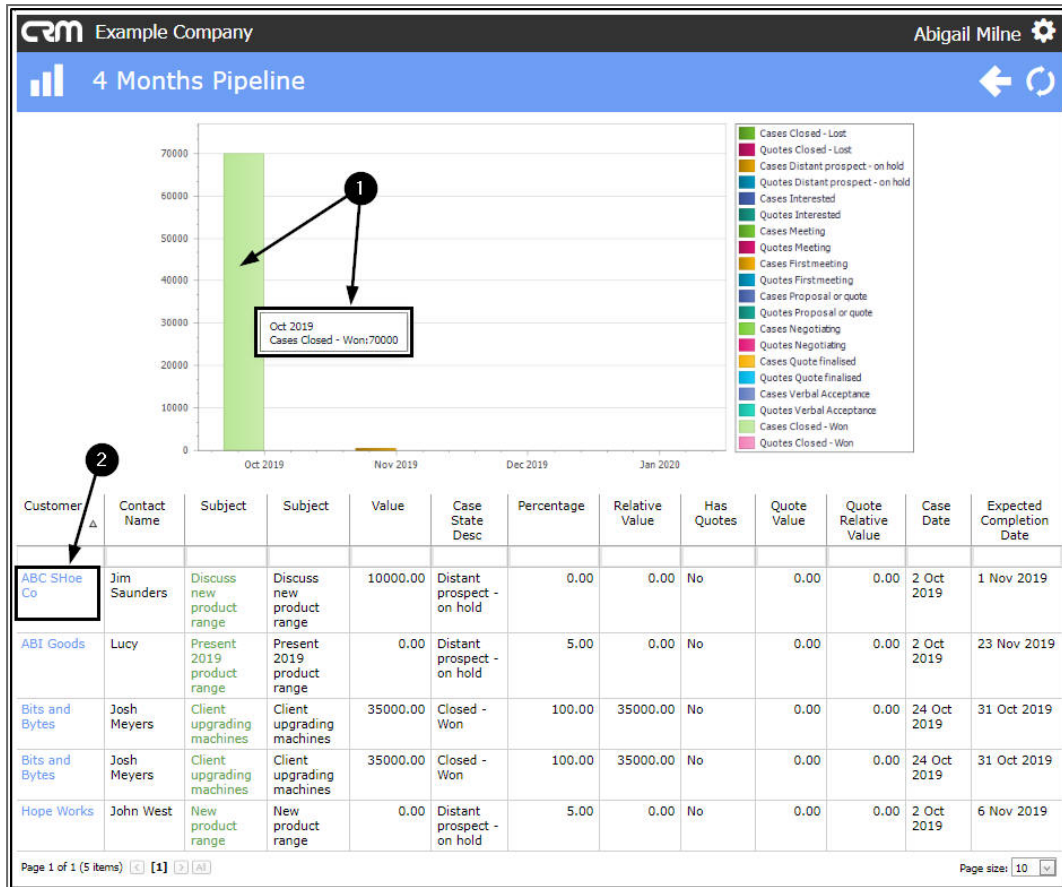
1. A [] Months Pipeline report page will open.
2. Here you can view the enlarged **bar graph** with corresponding **key code**,
3. and a list of your **cases** with the pertinent **case information** displayed.



1. **Hover anywhere** over a selected bar in the chart to display a related **information box**.
 - In this example, the bar represents **Cases Closed - Won** and the amount is **7000**.

VIEW CUSTOMER FROM PIPELINE PAGE

2. Click on a **customer name** in the **Customer** column.



1. The **Customer Homepage** will open.

Refer to [Introduction to the Customer Homepage](#) for more information.

2. You can also view the [] Month Pipeline frame in this page.

3. Click on the **Back** arrow to return to the [] Months Pipeline page.

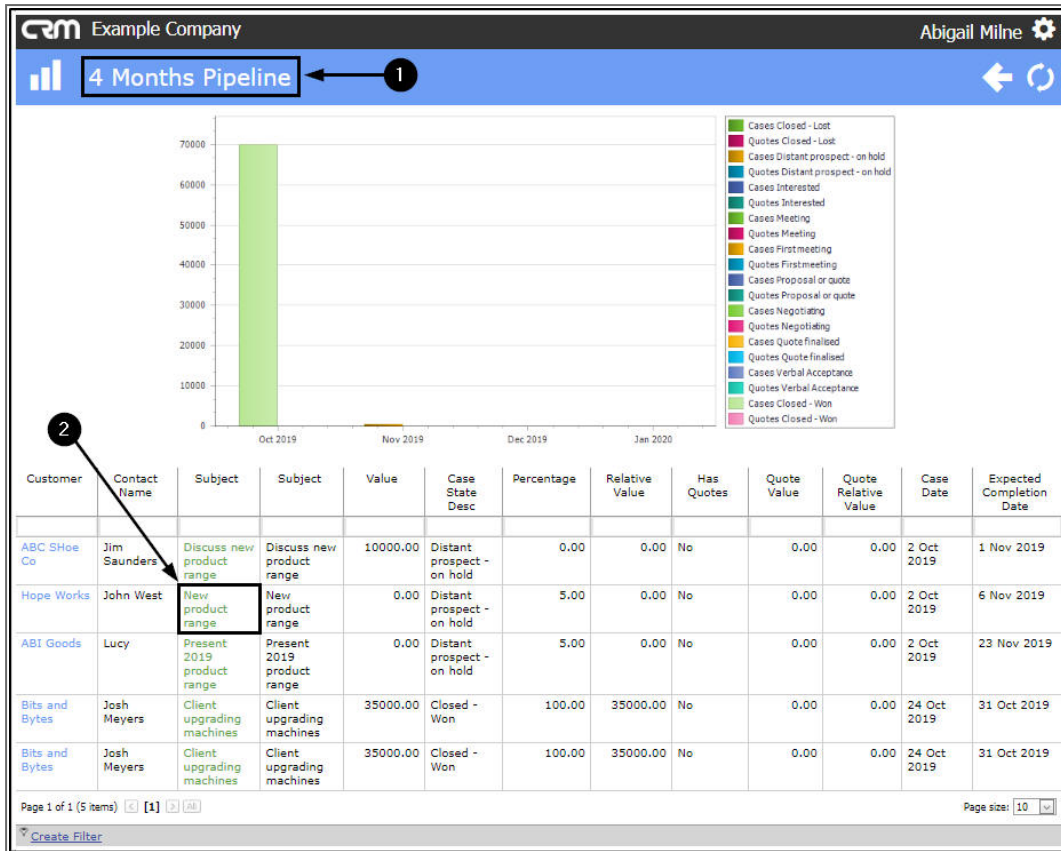
The screenshot shows a CRM dashboard for 'ABC SHoe Co'. At the top, there's a navigation bar with the company name and a search bar. Below this, the dashboard is divided into several sections:

- 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	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:** A bar chart showing performance for Cases, Invoices, Orders, and Quotes. The y-axis ranges from 0.00 to 30,000.00.
- 4 Month Pipeline:** A bar chart showing pipeline values for Oct 2019, Nov 2019, Dec 2019, and Jan 2020. The y-axis ranges from 0.00 to 500.00.
- Navigation Menu:** A grid of icons for various CRM functions like 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'.
- Customer Details:** A section for 'ABC SHoe Co - ABCXYZ123' showing a profile picture (a question mark), trading name, registered name, description, VAT No (9876543210), rank (Gold), website (http://), and phone number.
- 12 Months Sales History:** A line chart showing sales history from January 2018 to January 2019. The y-axis ranges from 0 to 0.5. The legend indicates 'Contract Income' (yellow) and 'Sales Revenue' (blue).

VIEW CASE FROM PIPELINE PAGE

1. In the [] Months Pipeline page,
2. Click on a **case** in the Case **Subject** column.



1. The **Save Case** page will open.

Refer to **Introduction to Cases** for more information.

Either,

2. Click on the **Customer icon** to return to the Customer Dashboard (Home page),
3. or click on the **Back** button,
4. or the **left arrow** to return to the previous page.

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main form is for a 'Case' with the following details:

- * Customer: Hope Works
- * Contact: John West
- * Salesman: Abigail Milne
- * Subject: New product range

Information: Information relating to the case

- * Value: 0.0000
- Case Type: New Deal
- Case Date: 2 Oct 2019
- Source Type: The type of source
- Expected Completion: 6 Nov 2019

Attachments: Attached files (Browse...)

Related Customers: Hope Works - HOP001

Case State: Distant prospect - on hold (5%)
Percentage: 5%

Left sidebar menu items: + Quote, - Case History, + Activities, + Quotes, + Case Changes

Annotations on the screenshot:

- 1: Points to the 'Save Case' button.
- 2: Points to the 'Save' icon in the top right toolbar.
- 3: Points to the 'Back' icon in the top right toolbar.
- 4: Points to the browser's back button in the address bar.

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