

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 <u>configured</u> as per your company requirements. VAT is <u>not</u> displayed in the pipeline.

Access: Webpage - 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 <u>3</u> months by default, but can be <u>configured</u> as per your company requirements. In this example, the pipeline months have been set to <u>4</u>.
- 3. Click anywhere in this frame.



CRM Exa	mple (	Company	2	2 Abig	ail Milne 🌣
🔼 Das	shboa	ard 🗲	-1	Search	Q
Activitie	s for	Last 30	Days	1 Month Performance 4 Month Pipel	line
Description	Target	Existing Custmrs	New Custmrs	30 000.00	
Phone call		2	2		
Email		0	0	20 000.00	
Meeting		0	0	200.00	
On Site inspection		0	0	10 000.00	
Site		0	0	0.00	
inspection					: 2019 Jan 2020
	15 Oct	2019 <b>19</b>		12 Today Recent Calendar	
S.		$\bigcirc$	A	Schedule Date 3	Status
create cold call	100.00	nmendations	warnings		
75	10000000	12	, and the second s	Who: Lucy , ABI Goods   11 Tel: 0810235036 Cell:	•
	1			Email: Bus: 0810235036	→ III
<b>.</b>		÷	Ē		Page size: 10 🗸
customers		cases	activities	s	
7	7	147		8	
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quotes	e	quipment	3rd party	ty	
				©2019 CO3 Technologies (Pty) Ltd ( 3.5.6.0 / 3.5.6.0)	

### **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.



	Example (	Company									Abiga	il Milne 🌻
	1 Mont	hs Pipe	line 🔫	-0	)							🔶 Ç
	1	70000							Cases Closed - Li Quotes Closed - I Cases Distant pr	Lost		
-		60000							Quotes Distant p Cases Interested Ouotes Intereste	rospect - on hold		
2		50000						_	Cases Meeting Quotes Meeting			
	9	40000							Cases Firstmeeti Quotes Firstmee Cases Proposal (	ting or quote		
	3	30000							Quotes Proposal Cases Negotiatin Quotes Negotiati	g ing		
3	3	20000							Cases Quote fina Quotes Quote fin Cases Verbal Acc	alised		
1		10000							Ouotes Verbal Ar			
1									Cases Closed - W			
Ţ		0	0ct 2019	Nov 2019		Dec 2019	Jan 2020		Cases Closed - W Quotes Closed -			
Customer	Contact Name		0ct 2019 Subject	Nov 2019 Value	Case State Desc	Dec 2019 Percentage	Jan 2020 Relative Value	Has Quotes			Case Date	Expected Completion Date
ABC SHoe		Subject Discuss new product			State		Relative	Has Quotes	Quotes Closed -	Quote Relative Value		Completion
Customer ABC SHoe Co	Name Jim	Subject Discuss new	Subject Discuss new product	Value 10000.00	State Desc Distant prospect -	Percentage	Relative Value	Has Quotes No	Quotes Closed - Quote Value	Quote Relative Value 0.00	Date	Completion Date
ABC SHoe Co	Name Jim Saunders	Subject Discuss new product range New product	Subject Discuss new product range New product	Value 10000.00 0.00	State Desc Distant prospect - on hold Distant prospect -	Percentage	Relative Value 0.00	Has Quotes No	Quotes Closed - Quote Value 0.00	Quote Relative Value 0.00	Date 2 Oct 2019 2 Oct	Completion Date
ABC SHoe Co Hope Works	Name Jim Saunders John West	Subject Discuss new product range New product range Present 2019 product	Subject Discuss new product range Present 2019 product	Value 10000.00 0.00	State Desc Distant prospect - on hold Distant prospect - Distant prospect -	Percentage 0.00 5.00	Relative Value 0.00 0.00	Has Quotes No No	Quotes Closed - Quote Value 0.00 0.00	Quote Relative Value 0.00 0.00	Date 2 Oct 2019 2 Oct 2019 2 Oct 2019	Completion Date 1 Nov 2019 6 Nov 2019

- 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.



	Example C I Month		line									il Milne 🌣
	7000 6000 5000 4000			•						- Lost prospect - on hold prospect - on ho ad ted eting etting il or quote		
¢	3000 2000 1000	0	Oct 2019 Cases Closed - W 2019	Von:70000 Nov 2019	15 M 1	Dec 2019	Jan 2020		Cases Negotiat Quotes Negotia Quotes Negotia Cases Quote fir Quotes Quote f Cases Verbal A Quotes Verbal Cases Closed Quotes Closed	ang ating inalised cceptance Acceptance Won		
Customer	Contact Name	Subject	Subject	Value	Case State Desc	Percentage	Relative Value	Has Quotes	Quote Value	Quote Relative Value	Case Date	Expected Completion Date
ABC SHoe Co	Jim Saunders	Discuss new product range	Discuss new product range	10000.00	Distant prospect - on hold	0.00	0.00	No	0.00	0.00	2 Oct 2019	1 Nov 2019
ABI Goods	Lucy	Present 2019 product range	Present 2019 product range	0.00	Distant prospect - on hold	5.00	0.00	No	0.00	0.00	2 Oct 2019	23 Nov 201
Bits and Bytes	Josh Meyers	Client upgrading machines	Client upgrading machines	<35000.00	Closed - Won	100.00	35000.00	No	0.00	0.00	24 Oct 2019	31 Oct 2019
	Josh Meyers	Client upgrading machines	Client upgrading machines	35000.00	Closed - Won	100.00	35000.00	No	0.00	0.00	24 Oct 2019	31 Oct 2019
Bits and Bytes				0.00	Distant	5.00	0.00		0.00		2 Oct	6 Nov 2019

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.





### **VIEW CASE FROM PIPELINE PAGE**

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



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		1							Cases Closed - Los	at		
		70000							Quotes Closed - Lo			
		10000							Cases Distant pro	spect - on hold		
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		60000							Cases Interested	out of the second second second		
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		50000							Cases Meeting			
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									Cases First meetin	g		
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2 Customer	Contact		Oct 2019 Subject	Nov 2019 Value	Case	Dec 2019 Percentage	Jan 2020 Relative Value	Has	Quotes Closed - W	Quote	Case	Expected
~	Contact Name		e 21 14		r v	an a		ľ	Quotes Closed - V	Von	Case Date	Expected Completio Date
~			e 21 14		Case State Desc	an a	Relative	Has Quotes	Quotes Closed - W	Quote Relative Value		Completio Date
Customer BC SHoe	Jim	Subject Discuss new product	Subject Discuss new product	Value 10000.00	Case State Desc Distant prospect -	Percentage	Relative Value	Has Quotes No	Quotes Closed - W Quote Value	Quote Relative Value 0.00	Date	Completio Date
Customer BC SHoe	Name Jim Saunders	Subject Discuss new product range New product	Subject Discuss new product range New product	Value 10000.00 0.00	Case State Desc Distant prospect - on hold Distant prospect -	Percentage 0.00	Relative Value 0.00	Has Quotes No No	Quotes Closed - W Quote Value 0.00	Quote Relative Value 0.00	Date 2 Oct 2019 2 Oct	Completio
Customer BC SHoe to tope Works	Name Jim Saunders John West	Subject Discuss new product range Present 2019 product	Subject Discuss new product range New product range Present 2019 product	Value 10000.00 0.00	Case State Desc Distant prospect - on hold Distant prospect - on hold	Percentage 0.00 5.00	Relative Value 0.00	Has Quotes No No	Quotes Closed - W Quote Value 0.00 0.00	Quote Relative Value 0.00 0.00	Date 2 Oct 2019 2 Oct 2019 2 Oct 2019	Completio Date 1 Nov 2019 6 Nov 2019

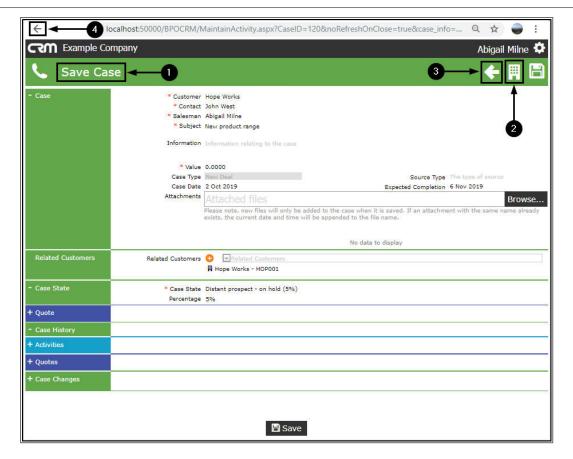
1. The Save Case page will open.

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.





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