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

CRM BASICS

3 MONTH PIPELINE SUMMARY

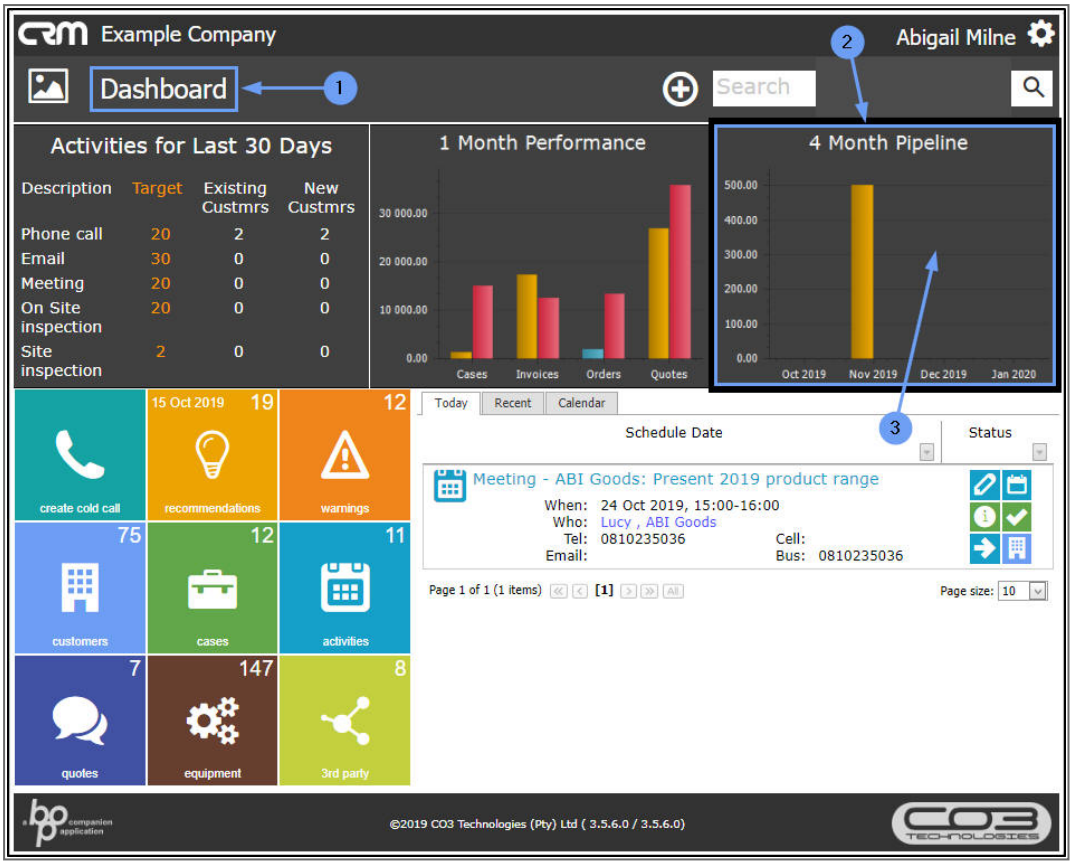
In this frame you can view a graph of your Pipeline based on your active Cases. Pipeline months are set to 3 months by default, but this can be configured as per your company requirements. VAT is not displayed in the pipeline.

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 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.

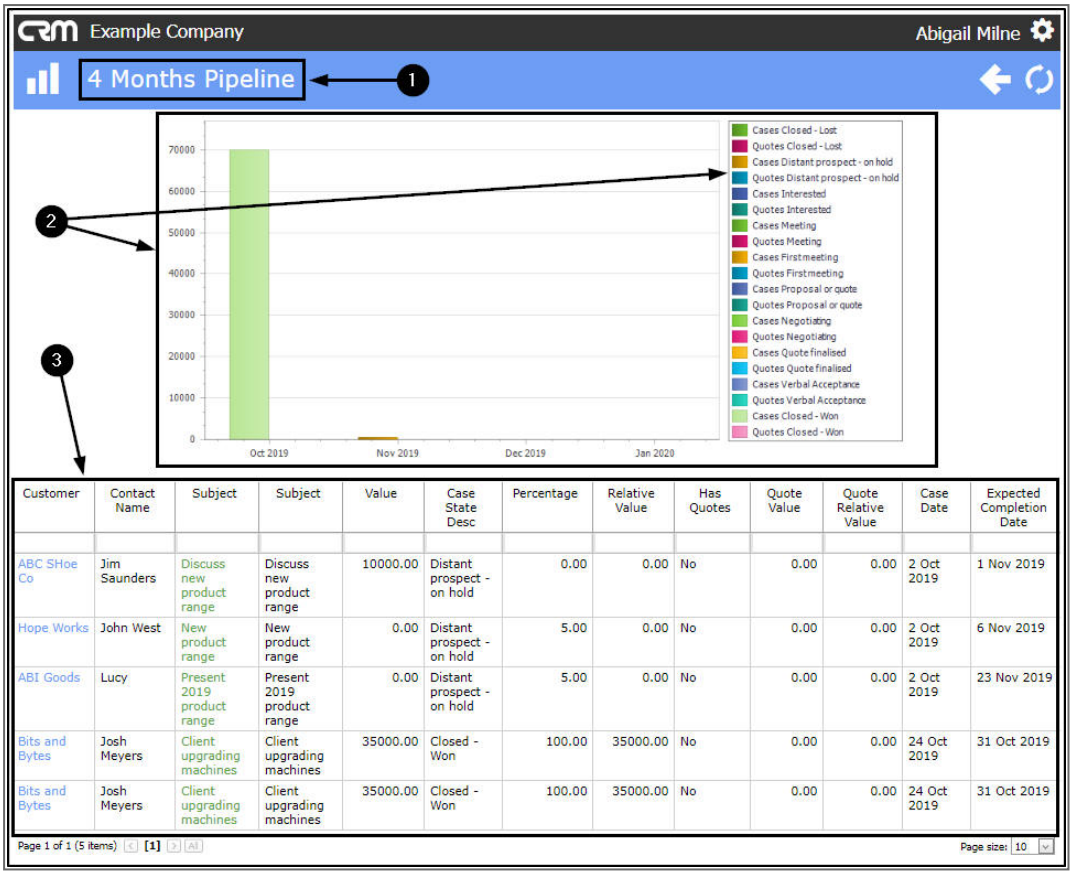
CO3 Technologies (Pty) Ltd © Company Confidential



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.

CO3 Technologies (Pty) Ltd © Company Confidential



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
Hope Works	John West	New product range	New product range	0.00	Distant prospect - on hold	5.00	0.00	No	0.00	0.00	2 Oct 2019	6 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 2019
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
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

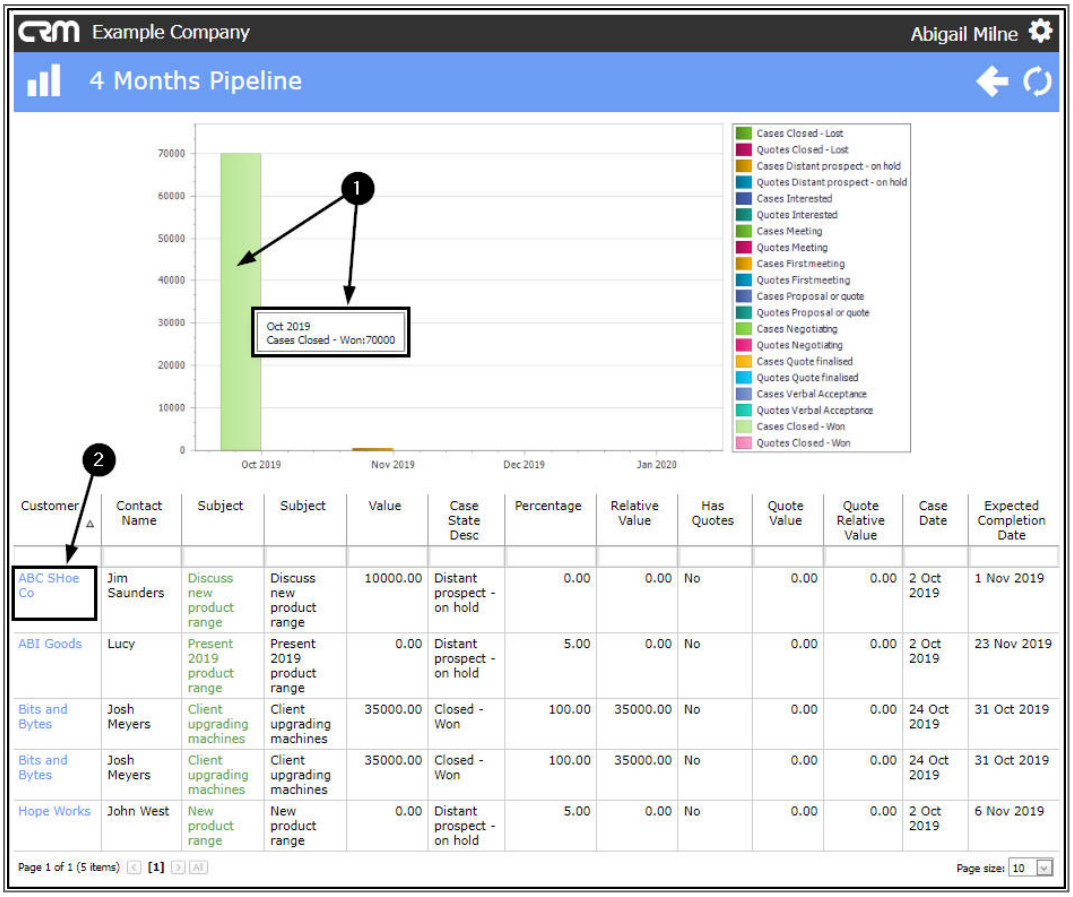
Page 1 of 1 (5 items) [1] Page size: 10

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.

CO3 Technologies (Pty) Ltd © Company Confidential

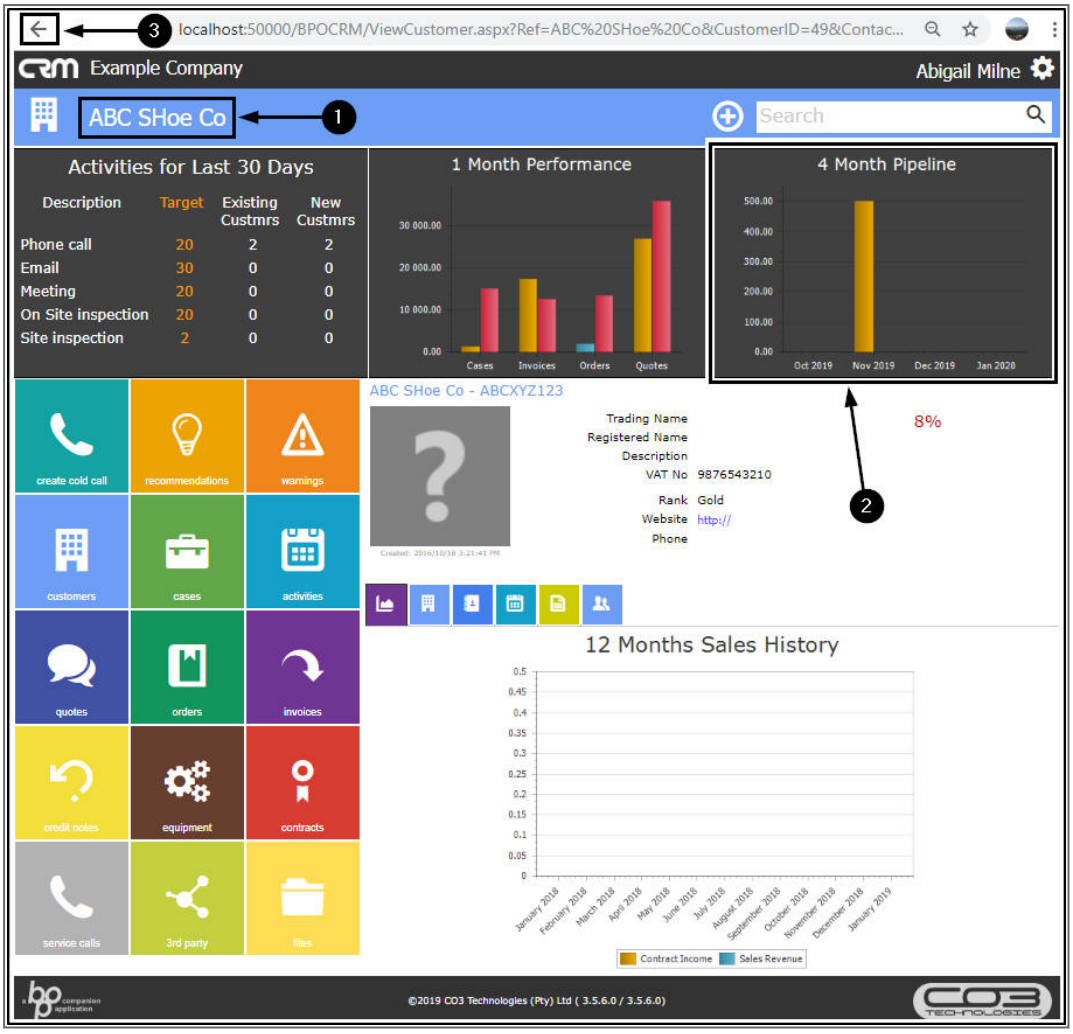


1. The **Customer Homepage** will open.

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.

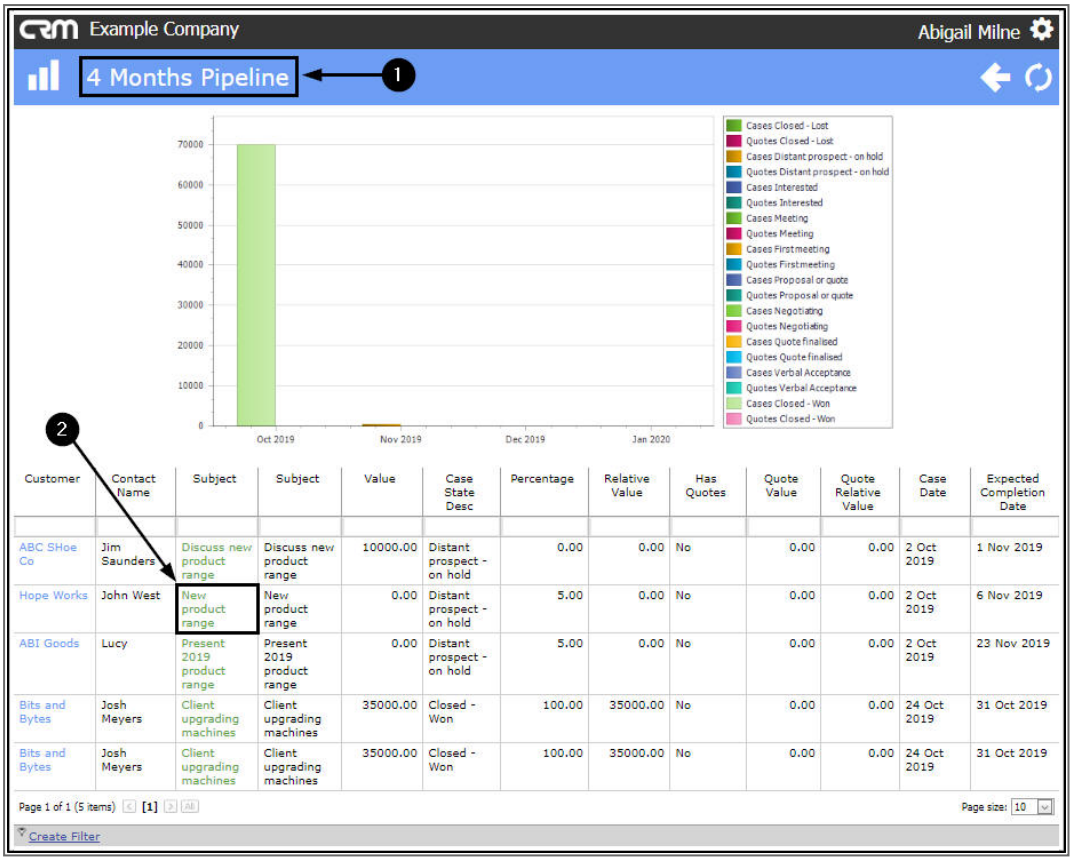
CO3 Technologies (Pty) Ltd © Company Confidential



VIEW CASE FROM PIPELINE PAGE

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

CO3 Technologies (Pty) Ltd © Company Confidential



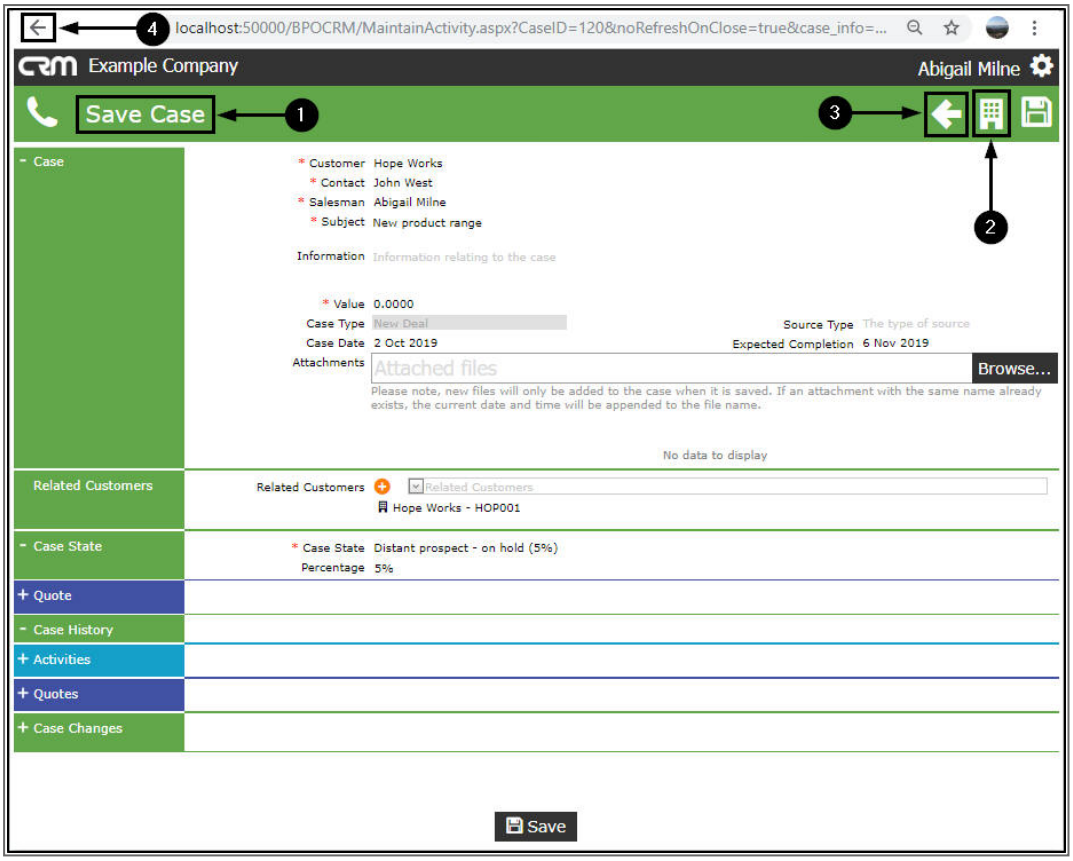
1. The **Save Case** page will open.

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.

CO3 Technologies (Pty) Ltd © Company Confidential



CRM.000.009

CO3 Technologies (Pty) Ltd © Company Confidential