

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

## CRM BASICS

### ACTION BUTTONS AND INFORMATION TILES

The customers that you can view in CRM will be:

- the customers where you are the **main salesperson** or
- the customers where you are **linked** as a salesperson.

This list may include current BPO customers or **New - CRM customers**.

In the **Customers** listing page you can view and access the following customer **Actions** buttons:

- **Edit Customer**
- **Add Contact**
- **Add Third Party**
- **Add Note**
- **Maintain Customer Salesmen**
- **New Activity**
- **New Quote**
- **Release Customer** (New CRM Customers only)

In the **Customer Dashboard** (Customer Home page) you can view and access all the **Actions** buttons as listed above as well as the:

- **Create Cold Call for Customer**

You can also access the following customer **Information** tiles:

- **Sales**
- **Addresses**
- **Contacts**

- Open Activities
- Notes
- Salesmen

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

## VIEW CUSTOMER LIST

1. In the **Homepage**,
2. Click on the **Customers** tile.
3. **Note:** The number in the top left of the tile indicates how many customers that you are linked to.

The screenshot displays the CRM dashboard for 'Example Company' with the user 'Abigail Milne'. The dashboard includes a search bar, a 'Dashboard' tab, and several performance charts and action tiles.

**Activities for Last 30 Days**

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	0
Email	30	0	0
Meeting	40	0	0
On Site inspection	50	0	0
Site inspection	2	0	0

**1 Month Performance**

Bar chart showing performance metrics for Cases, Invoices, Orders, and Quotes. The Y-axis ranges from 0.00 to 15,000.00.

**4 Month Pipeline**

Line chart showing the pipeline over time from Aug 2019 to Nov 2019. The Y-axis ranges from 0.00 to 0.50.

**Action Tiles:**

- create cold call (30 Sep 2016, 0)
- recommendations (3)
- warnings (6)
- customers (74)
- cases (6)
- activities (6)
- quotes (6)
- equipment (147)
- 3rd party (6)

The 'customers' tile is highlighted with a blue box and a blue arrow labeled '2'. The 'Dashboard' tab is highlighted with a blue box and a blue arrow labeled '1'.

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- The **Customers** listing page will open.
  - Here you can view all the customers where you are either the **main** salesperson or **linked** as a salesperson.

## CUSTOMER ACTION BUTTONS

- Hover over** a selected customer.
  - In this example, **Hope Works** has been selected.

## ACTIVE OR RELEASED

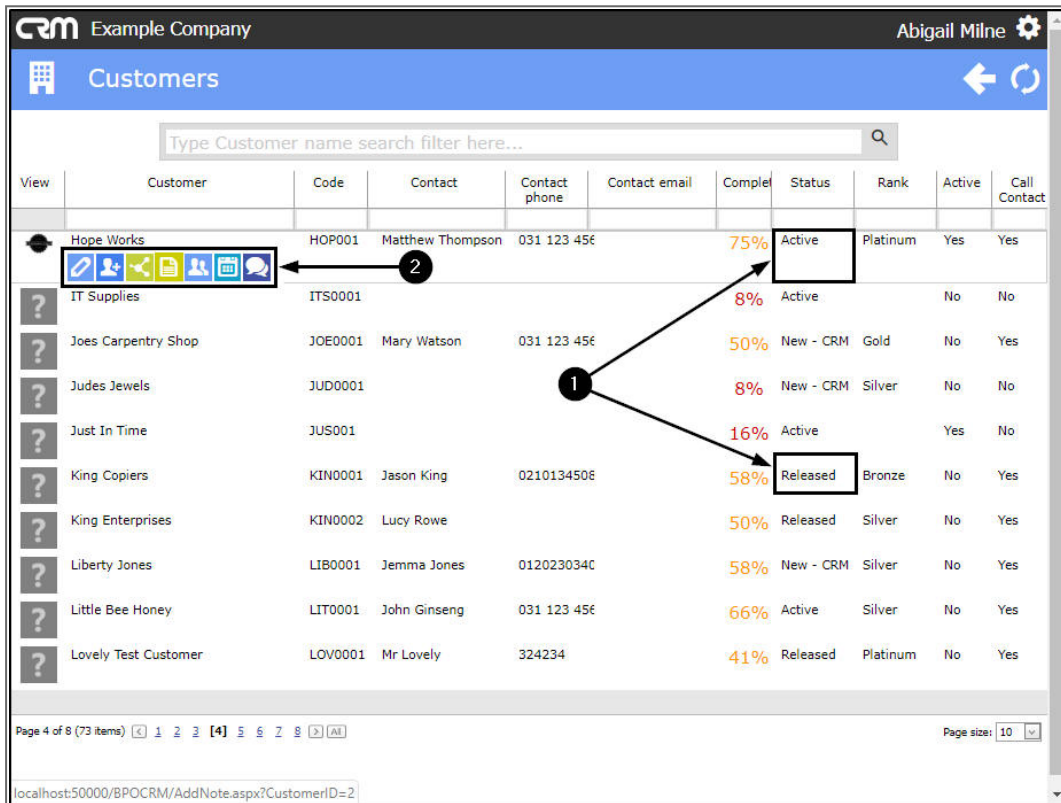
Note on Customer Status **Active** or **Released**

- You will note that the **status** of this customer is **Active**. The Actions buttons that are available (shown in the next image) will depend on the **status** of the selected customer.

View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
?	Hope Works	HOP001	Matthew Thompson	031 123 456		75%	Active	Platinum	Yes	Yes
?	IT Supplies	ITS0001				8%	Active		No	No
?	Joes Carpentry Shop	JOE0001	Mary Watson	031 123 456		50%	New - CRM	Gold	No	Yes
?	Judes Jewels	JUD0001				8%	New - CRM	Silver	No	No
?	Just In Time	JUS001				16%	Active		Yes	No
?	King Copiers	KIN0001	Jason King	0210134506		58%	Released	Bronze	No	Yes
?	King Enterprises	KIN0002	Lucy Rowe			50%	Released	Silver	No	Yes
?	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	New - CRM	Silver	No	Yes
?	Little Bee Honey	LIT0001	John Ginseng	031 123 456		66%	Active	Silver	No	Yes
?	Lovely Test Customer	LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes

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- As you hover over an **Active** or **Released** customer,
- the following **Actions buttons** will be displayed:
  - Edit Customer
  - Add Contact
  - Add Third Party
  - Add Note
  - Maintain Customer Salesmen
  - New Activity
  - New Quote



## NEW - CRM

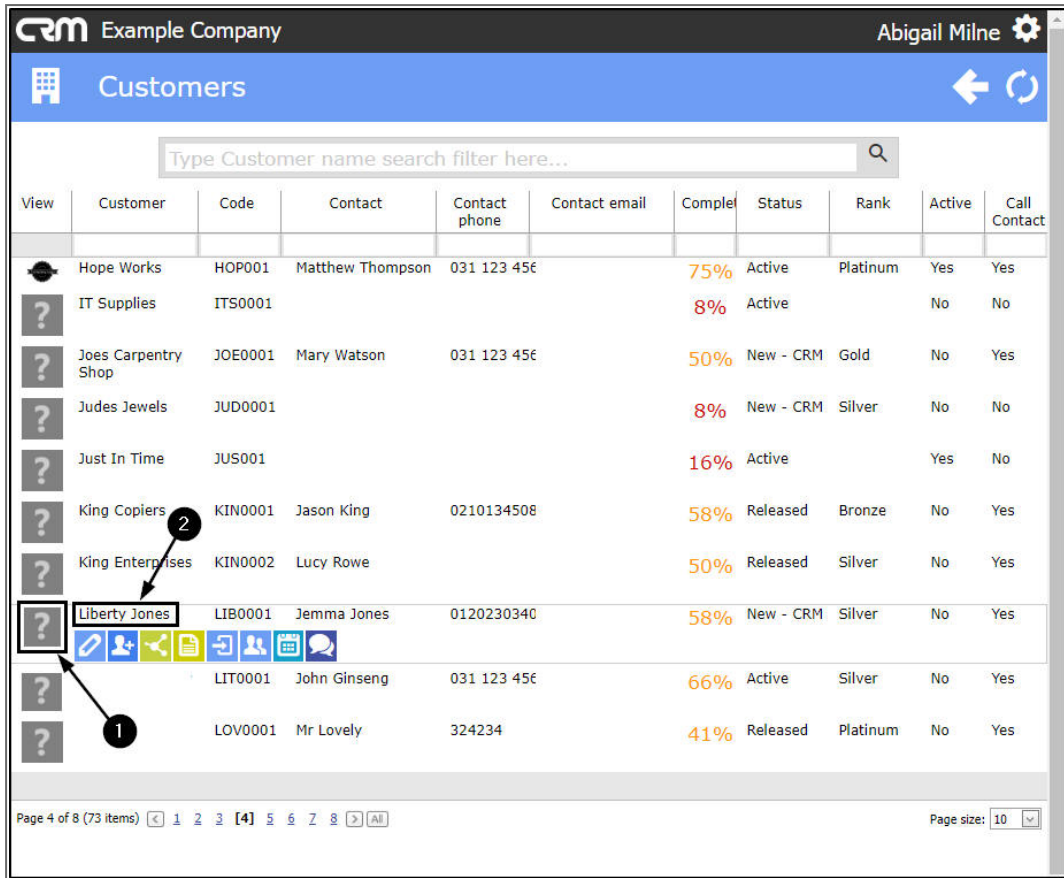
- If you selected a customer that is in status **New - CRM** then you will note an additional Action button:
- Release Customer** (for approval in BPO)

View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
	Hope Works	HOP001	Matthew Thompson	031 123 456		75%	Active	Platinum	Yes	Yes
	IT Supplies	ITS0001				8%	Active		No	No
	Joes Carpentry Shop	JOE0001	Mary Watson	031 123 456		50%	New - CRM	Gold	No	Yes
	Judes Jewels	JUD0001				8%	New - CRM	Silver	No	No
	Just In Time	JUS001				16%	Active		Yes	No
	King Copiers	KIN0001	Jason King	0210134506		58%	Released	Bronze	No	Yes
	King Enterprises	KIN0002	Lucy Rowe			50%	Released	Silver	No	Yes
	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	New - CRM	Silver	No	Yes
	Little Bee Honey	LIT0001	John Ginseng	031 123 456		66%	Active	Silver	No	Yes
	Lovely Test Customer	LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes

## CUSTOMER HOME PAGE

To view both the customer **Actions buttons** and the customer **Information tiles** in the same screen - you will need to navigate to the **Customer Dashboard**.

1. In the **Customers** listing page, click on the selected customer icon in the **View** column.
2. In this example, **Liberty Jones** has been selected.



1. The selected **Customer Dashboard** will open.

## CUSTOMER INFORMATION TILES

2. The customer **Information tiles** are displayed directly on this page:

- Sales
- Addresses
- Contacts
- Open Activities
- Notes
- Salesmen

## CUSTOMER ACTION BUTTONS

3. To view the customer **Action** buttons hover anywhere in the customer information frame.

**CRM Example Company** Abigail Milne

**Customer Dashboard** Search

Activities for Last 30 Days			
Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	0
Email	30	0	0
Meeting	40	0	0
On Site inspection	50	0	0
Site inspection	2	0	0

**1 Month Performance**

15 000.00  
12 000.00  
9 000.00  
6 000.00  
3 000.00  
0.00

Cases Invoices Orders Quotes

**4 Month Pipeline**

0.50  
0.40  
0.30  
0.20  
0.10  
0.00

Sep 2019 Oct 2019 Nov 2019 Dec 2019

**Liberty Jones - LIB0001**

Trading Name Liberty Jones **58%**  
Registered Name Liberty Jones  
Description Household and Clothing Stores Head Office  
VAT No  
Rank Silver  
Website http://  
Phone 0120230340

Created: 2019/06/21 2:27:40 PM

create cold call recommendations warnings  
customers cases activities  
quotes orders invoices  
credit notes equipment contracts  
service calls 3rd party files

**12 Months Sales History**

0.5  
0.45  
0.4  
0.35  
0.3  
0.25  
0.2  
0.15  
0.1  
0.05  
0

September 2018 October 2018 November 2018 December 2018 January 2019 February 2019 March 2019 April 2019 May 2019 June 2019 July 2019 August 2019 September 2019

Contract Income Sales Revenue

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1. The customer **Actions Buttons** will then be displayed:

- Edit Customer
- Add Contact
- Add Third Party
- Add Note

- **Maintain Customer Salesmen**
- **Create Cold Call for Customer** (this button is only available from the Customer Home page)
- **New Activity**
- **New Quote**
- **Release Customer** (this button is only available for **New - CRM customers**)

2. Click on any of these buttons to direct you to the relevant **Action page**.

**CRM Example Company** | Abigail Milne

**Customer Dashboard** | Search

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	0
Email	30	0	0
Meeting	40	0	0
On Site inspection	50	0	0
Site inspection	2	0	0

**1 Month Performance**

**4 Month Pipeline**

**Liberty Jones - LIB0001**

Trading Name: Liberty Jones  
Registered Name: Liberty Jones  
Description: Household and Clothing Stores Head Office  
VAT No:  
Rank: Silver  
Website: http://  
Phone: 0120230340

58%

**12 Months Sales History**

Contract Income | Sales Revenue

CRM.000.013