

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

CRM BASICS

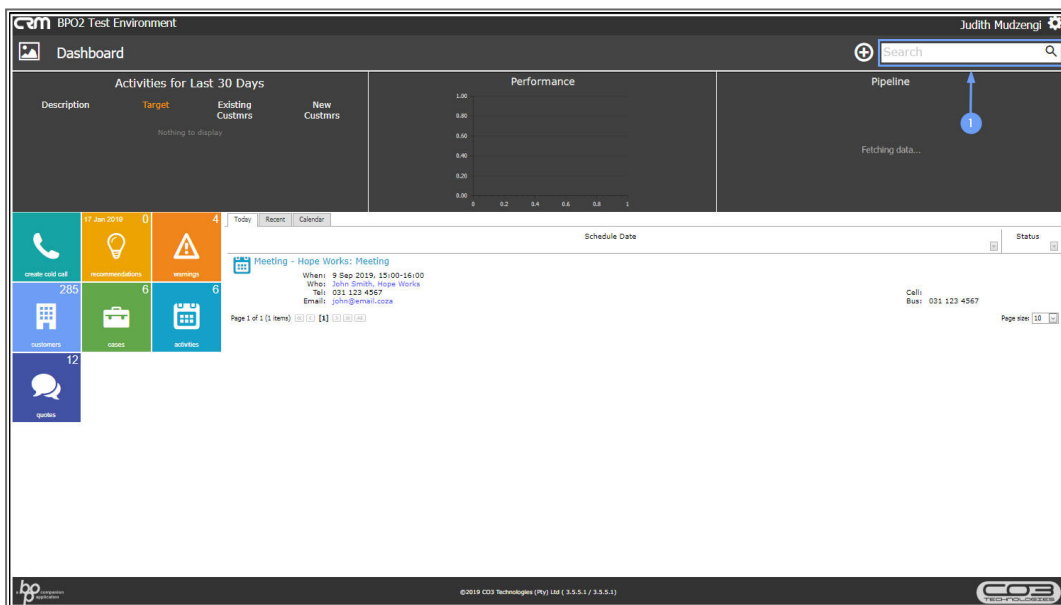
SEARCH CUSTOMER/CLIENT

You can search for a customer using the Customer Name, Trading Name or Registered Name. Just type all or part of the text that you are looking for and press **Enter** on your keyboard or click on the **Search** icon.

You can also search for a customer by Contact Name.

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

1. You can either access the **Search Bar** from the **Homepage**.



2. or from the **Customer Homepage**.

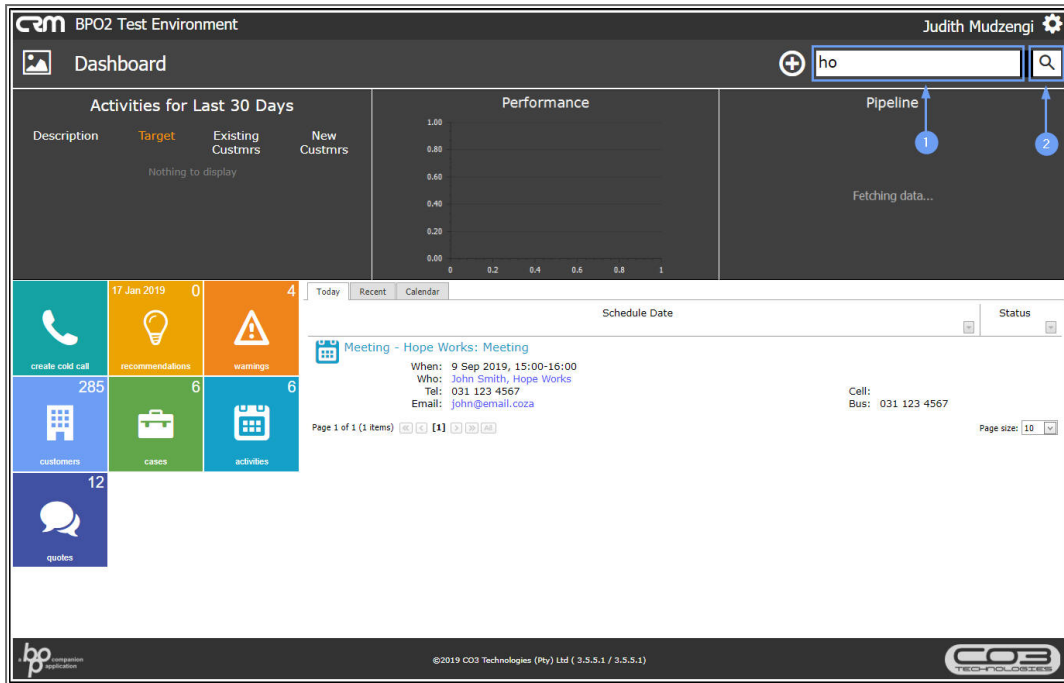
The screenshot displays a CRM interface for a customer named 'Hope Works'. The interface includes a search bar at the top right with a magnifying glass icon and a '2' next to it. Below the search bar, there are three main sections: 'Activities for Last 30 Days', '3 Month Performance', and '3 Month Pipeline'. The 'Activities for Last 30 Days' section contains a table with columns for Description, Target, Existing Customers, and New Customers. The '3 Month Performance' section shows a bar chart with categories: Calls, Visits, Orders, and Quotes. The '3 Month Pipeline' section shows a bar chart with categories: Sep 2019, Oct 2019, and Nov 2019. Below these sections is a central card for 'Hope Works - HOP0001' with a question mark icon and a '75%' completion indicator. The card lists details: Trading Name (Hope Works), Registered Name (Hope Works), Description (Hope Works), VMT No, Rank (Silver), Website (http://), and Phone (031 123 4567). Below the card is a '12 Months Sales History' chart showing 'Contract Income' and 'Sales Revenue' from September 2018 to September 2019. The bottom of the interface features a navigation bar with various icons and the CO3 logo.

Description	Target	Existing Customers	New Customers
Phone call	10000	0	5
Email	5000	0	0
Meeting	10000	0	2
Site Inspection	6	0	0

SEARCH FROM THE HOMEPAGE

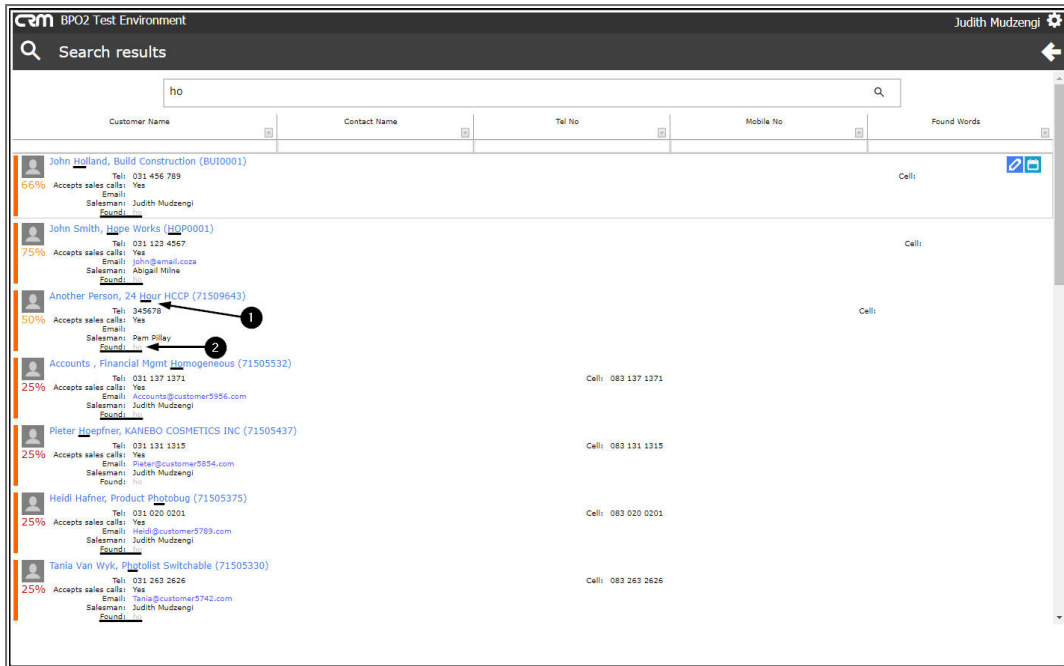
For the purpose of this manual, we will work from the **Homepage**.

1. In the **Search Bar**, type in the search query or Customer Name or Trading Name or Registered Name or Customer Contact .
2. Click on the **Search icon**.



The **Search Results** screen will be displayed.

1. All the customers that have the 'search' word in their customer name / customer contact / trading name / registered name will be displayed.
2. The system will show which part of the 'search' word was found during the search on each result.



1. You can also type in multiple words in the **Search Bar** to refine your search.
2. All the customers that have any part of the 'search' word(s) in their customer name / customer contact / trading name / registered name will be displayed. The search engine will list the 'closest' match(es) higher on the list to help you find the contact you are looking for.
3. The system will show which part of the 'search' word(s) was found during the search on each result.

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Search results

Search: hope wor

Customer Name	Contact Name	Tel No	Mobile No	Found Words
John Smith, Hope Works (HOP0001)				
Theresa Wheeler, JIRA Networked (71505555)			061 512 415	
Johan van Staden, Framework HCFA (71505361)		031 039 0388		
Makos, Alliance IAR Embedded Workbench (71505341)		031 312 3122		
Lizelle Bairstow, Framework HCFA (71505361)		031 039 0388		

Annotations: 1 points to the search bar, 2 points to the 'Hope Works (HOP0001)' link, 3 points to the 'Found: www.hopworks.com' text.

- Click on the on the item you wish to view more details for.

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Search results

Search: hope wo

Customer Name	Contact Name	Tel No	Mobile No	Found Words
John Smith, Hope Works (HOP0001)				
Theresa Wheeler, JIRA Networked (71505555)			061 512 415	
Johan van Staden, Framework HCFA (71505361)		031 039 0388		
Makos, Alliance IAR Embedded Workbench (71505341)		031 312 3122		
Rafick Dawood, Yozio Heuristic (71505514)		031 783 7832		

Expanded details for John Smith, Hope Works (HOP0001):

- 75% Accepts sales calls: Yes
- Tel: 031 123 4567
- Email: john@email.co.za
- Salesman: Abigail Milne
- Found: www.hopworks.com

- More details of the item will be displayed.

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Search results

hope wo

Customer Name	Contact Name	Tel No	Mobile No	Found Words
John Smith, Hope Works (HOP0001)				Cell:
Theresa Wheeler, JIRA Networked (71505555)			061 512 415	
Johan van Staden, Framework HCFA (71505361)		031 039 0388	083 039 0388	
Makos, Alliance IAR Embedded Workbench (71505341)		031 312 3122	083 312 3122	

- Click on the **View** icon of the customer you wish to observe.

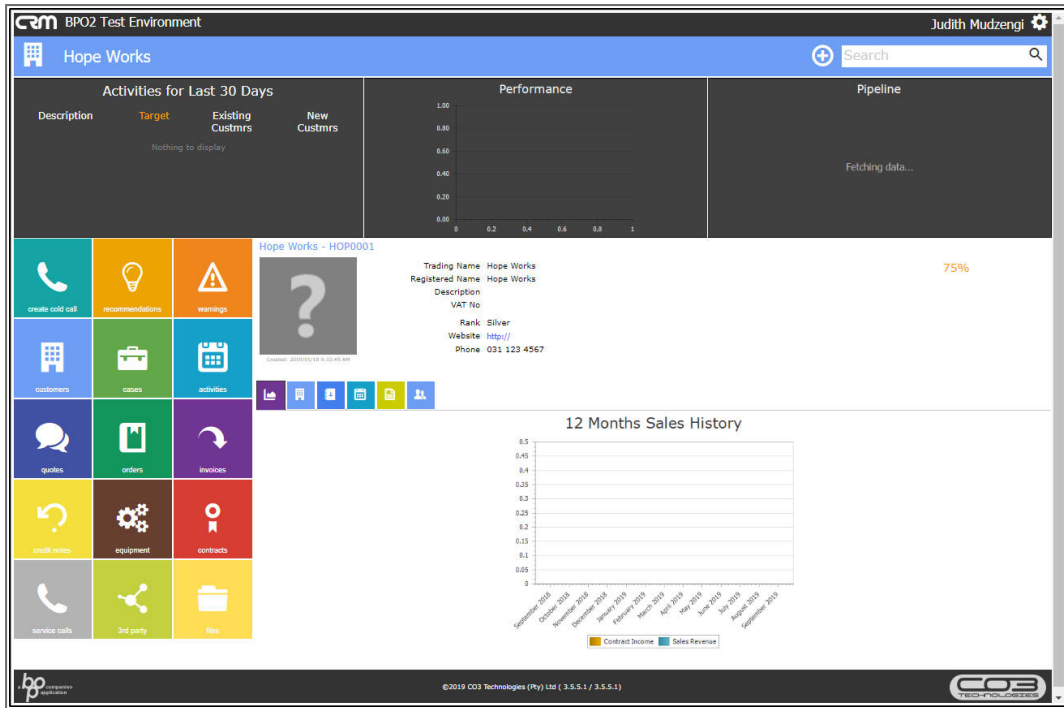
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Search results

hope wo

Customer Name	Contact Name	Tel No	Mobile No	Found Words
John Smith, Hope Works (HOP0001)				Cell:
Theresa Wheeler, JIRA Networked (71505555)			061 512 415	
Johan van Staden, Framework HCFA (71505361)		031 039 0388	083 039 0388	
Makos, Alliance IAR Embedded Workbench (71505341)		031 312 3122	083 312 3122	
Rafick Dawood, Yozio Heuristic (71505514)		031 783 7832	083 783 7832	

The **Customer Homepage** will be displayed.



- Hover over an item.
- The following action items will be displayed:
 1. View / Edit this Contact
 2. Create a new case and activity for this contact

Note: You can only view / edit a contact or create a new case and activity for customers where **(a)** you are the main salesman or linked salesmen, and **(b)** where the customer has addresses configured.

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Judith Mudzengi

Search results

Customer Name	Contact Name	Tel No	Mobile No	Found Words
John Smith, Hope Works (HOP0001) 75% Accepts sales calls: Yes Tel: 031 123 4567 Email: john@email.co.za Salesman: Abigail Milne Found: wo hope			Cell:	
Theresa Wheeler, IIRA Networked (71505555) 75% Accepts sales calls: Yes Tel: 031 215 415 Email: theresa@noemail.com Salesman: Judith Mudzengi Found: wo			Cell: 061 512 415	
Johan van Staden, Framework HCFA (71505361) 25% Accepts sales calls: Yes Tel: 031 039 0388 Email: johan@customer5773.com Salesman: Judith Mudzengi Found: wo			Cell: 083 039 0388	
Makos, Alliance IAR Embedded Workbench (71505341) 25% Accepts sales calls: Yes Tel: 031 312 3122 Email: Makos@customer5753.com Salesman: Judith Mudzengi Found: wo			Cell: 083 312 3122	
Rafick Dawood, Yozio Heuristic (71505514) 25% Accepts sales calls: Yes Tel: 031 783 7832 Email: Rafick.Dawood@customer5938.com Salesman: Judith Mudzengi Found: wo			Cell: 083 783 7832	

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