

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

## CRM BASICS

### DASHBOARD SETTINGS OPTIONS

CRM is designed with the Salesman in mind. All information viewed is specific to the user that is logged in. This user, sees only his/her Customers, Cases, Activities, Pipeline, etc. and can plan accordingly.

#### SETTINGS OPTIONS OVERVIEW

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You can open the Settings frame to access 4 different settings Options:

##### Show items for subordinates

- If you are a Sales Manager, you can view your team's information by selecting **Show items for subordinates** in the Dashboard (Home page). Your team is defined by the **employee hierarchy / Organisational Chart** in Nucleus Service. Each employee within the sales team needs to have their sales manager set up as **Manager** when **adding or editing an employee**.

##### Exclude deleted customers in search on Cold Call screen

- Selecting this option means that only **Active** customers will display in the selection lists when you are doing a search for a customer or contact.

##### Hide dashboard panel

- Selecting this option will hide the Dashboard panel in both the Home page and the Customer Home page, giving more space to view other details in both of those pages.

### Hide dashboard panel on customer page

- Selecting this option will only hide the Dashboard panel in the Customer Home page, giving more space to view other details in this page.

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**Ribbon Access:** Webpage > `http://[servername]:[port-no]/BPOCRM/User.aspx`

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### SHOW ITEMS FOR SUBORDINATES

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1. In the **Home** page (Dashboard),
2. Note the figures in the **Activities for Last 30 Days** frame and the bar graph amounts in the **1 Month Performance** frame and the **4 Month Pipeline** frame.
3. **Hover over** or click on the **User Name** or **Settings** icon

CRM Example Company Abigail Milne

**Dashboard** Search

### Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Email	30	0	2
Meeting	20	1	0
On Site inspection	20	0	0
Phone call	20	0	0

### 1 Month Performance

Bar chart showing performance for Cases, Invoices, Orders, and Quotes. Y-axis ranges from 0.00 to 30,000.00.

### 4 Month Pipeline

Line chart showing pipeline over time from Dec 2019 to Mar 2020. Y-axis ranges from 0.00 to 0.50.

15 Oct 2019	19	5
create cold call	recommendations	warnings
75	8	7
customers	cases	activities
15	147	8
quotes	equipment	3rd party

Today Recent Calendar

Schedule Date Status

- Email - King Copiers: Customer keen to discuss upgrade**  
 When: 5 Dec 2019, 13:00-14:00  
 Who: Jason King, King Copiers  
 Tel: 0210134508 Cell: 0210134508  
 Email:
- On Site inspection - Hope Works: Visit site to assess upgrade requirements**  
 When: 5 Dec 2019, 13:00-14:00  
 Who: John West, Hope Works  
 Tel: 321654987 Cell: 031 123 4567  
 Email: jwest@noemail.com
- On Site inspection - Hope Works: Customer keen to update machines**  
 When: 5 Dec 2019, 10:00-11:00  
 Who: Stewart Hope, Hope Works  
 Tel: 031 123 4567 Cell: 031 123  
 Email: standard@noemail.coza

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1. The **Settings** frame will expand and the
2. **Options** list will be displayed.
3. Select the **Show items for subordinates** check box.



1. As you select the check box,
2. The 3 Dashboard frames:
  - i. **Activities for the Last 30 Days**
  - ii. **1 Month Performance**
  - iii. **4 Month Pipeline**
 will automatically refresh.



Click anywhere outside of the expanded Settings frame to collapse it.

1. The figures in the 3 Dashboard frames:

i. **Activities for the Last 30 Days**

ii. **1 Month Performance**

iii. **4 Month Pipeline**

will now include the subordinates statistics.



## EXCLUDE DELETED CUSTOMERS ON COLD CALL SCREEN

This will show only the Active customers when you are doing a search for a customer or contact.

1. In the **Home** page,
2. **Hover over** or click on the **User Name** or **Settings** icon to display the **Settings** frame.
3. In the **Options** list, select the **Exclude deleted customers in search on Cold call screen** check box.

CRM Example Company

Abigail Milne

1 Dashboard

2

3

Activities for Last 30 Days

Description	Target	Existing Custrms	New Custr
Email	30	0	2
Meeting	20	1	0
On Site inspection	20	0	0
Phone call	20	0	0

Options

- Show items for subordinates
- Exclude deleted customers in search on Cold Call screen
- Hide dashboard panel
- Hide dashboard panel on customer page

0.00 Cases Invoices Orders Quotes 0.00

Dec 2019 Jan 2020 Feb 2020 Mar 2020

15 Oct 2019 19 5

create cold call recommendations warnings

75 8 7

customers cases activities

15 147 8

quotes equipment 3rd party

Today Recent Calendar

Schedule Date Status

Email - King Copiers: Customer keen to discuss upgrade

When: 5 Dec 2019, 13:00-14:00  
 Who: Jason King, King Copiers  
 Tel: 0210134508 Cell:  
 Email: Bus: 0210134508

On Site inspection - Hope Works: Visit site to assess upgrade requirements

When: 5 Dec 2019, 13:00-14:00  
 Who: John West, Hope Works  
 Tel: 321654987 Cell:  
 Email: jwest@noemail.com Bus: 031 123 4567

On Site inspection - Hope Works: Customer keen to update machines

When: 5 Dec 2019, 10:00-11:00  
 Who: Stewart Hope, Hope Works  
 Tel: 031 123 4567 Cell:  
 Email: sthoped@noemail.com Bus: 031 123 4567

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View the results of this selection here...(tba)



The screenshot shows the CO3 CRM interface for user Bianca Du Toit. The 'Session Options' section is highlighted with a red box, containing the following settings:

- Show items for subordinates
- Exclude deleted customers from search **Saved**
- Hide dashboard panel on customer page

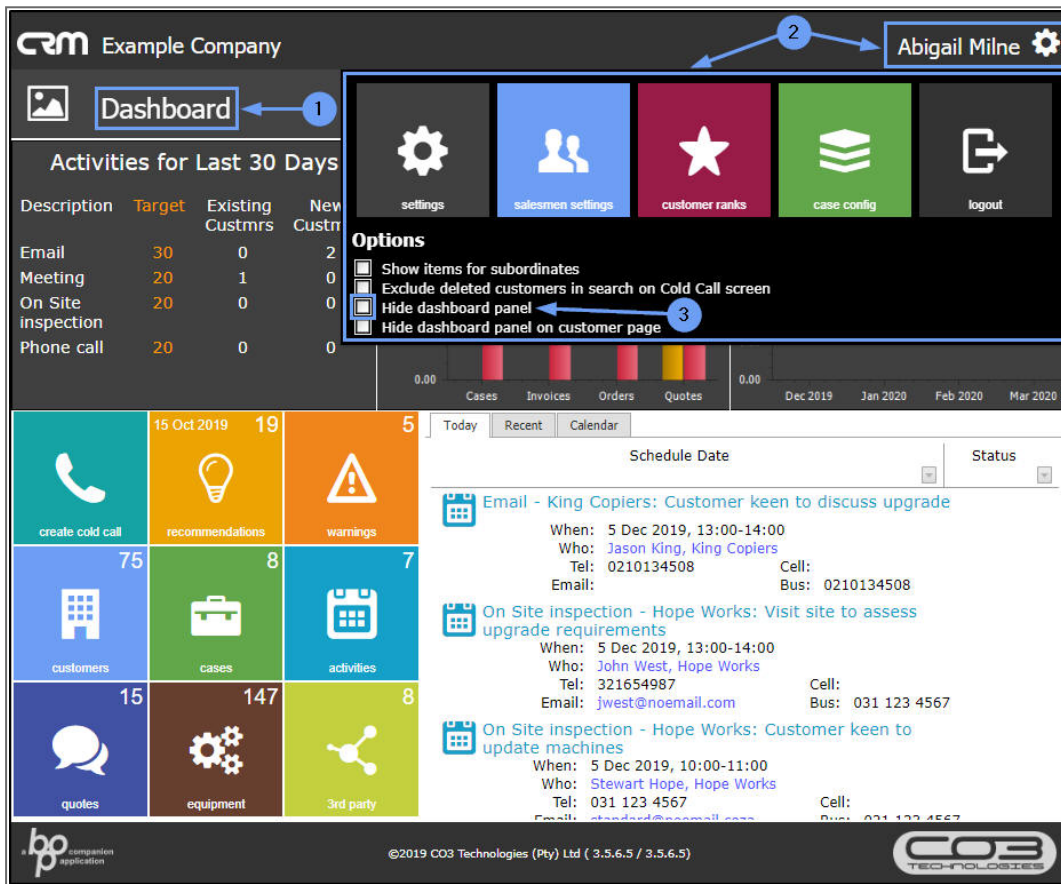
Other visible elements include a navigation menu with 'settings', 'salesman settings', 'customer ranks', 'stage gates', and 'logout'; a 'Month Pipeline' chart; a dashboard with tiles for 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', and 'quotes'; and a meeting detail card for 'Meeting - Meet to discuss requirements' on 4 Oct 2016.



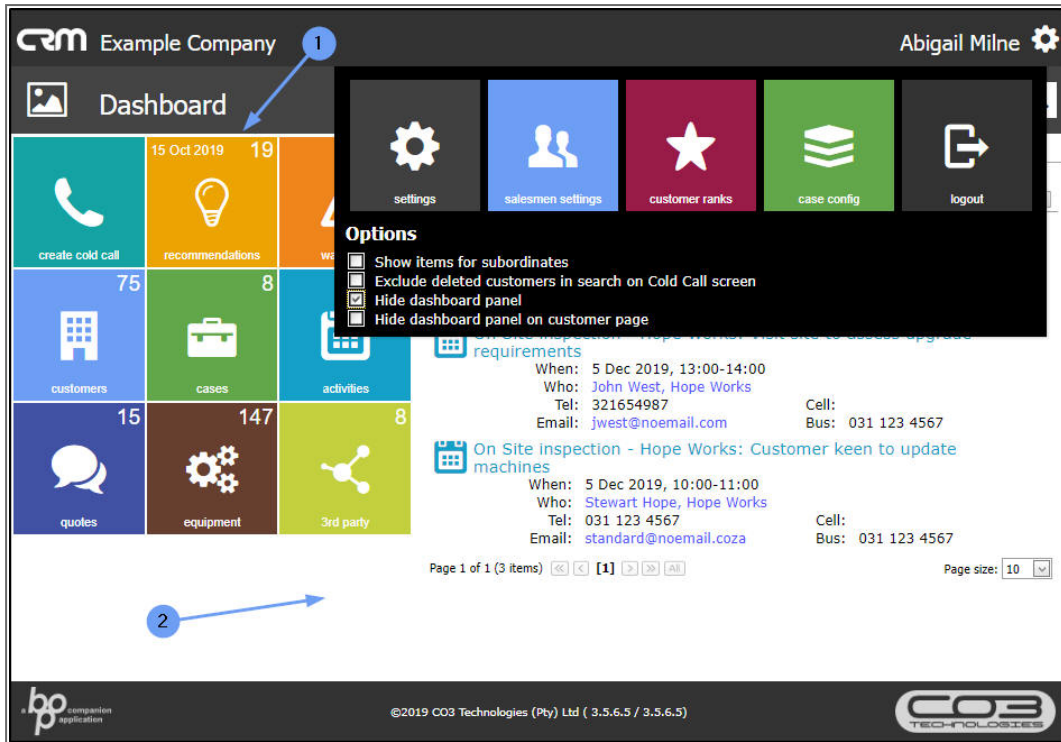
## HIDE DASHBOARD PANEL

Hiding the Dashboard panel will give you more space to view the details on your Home page and Customer Home page.

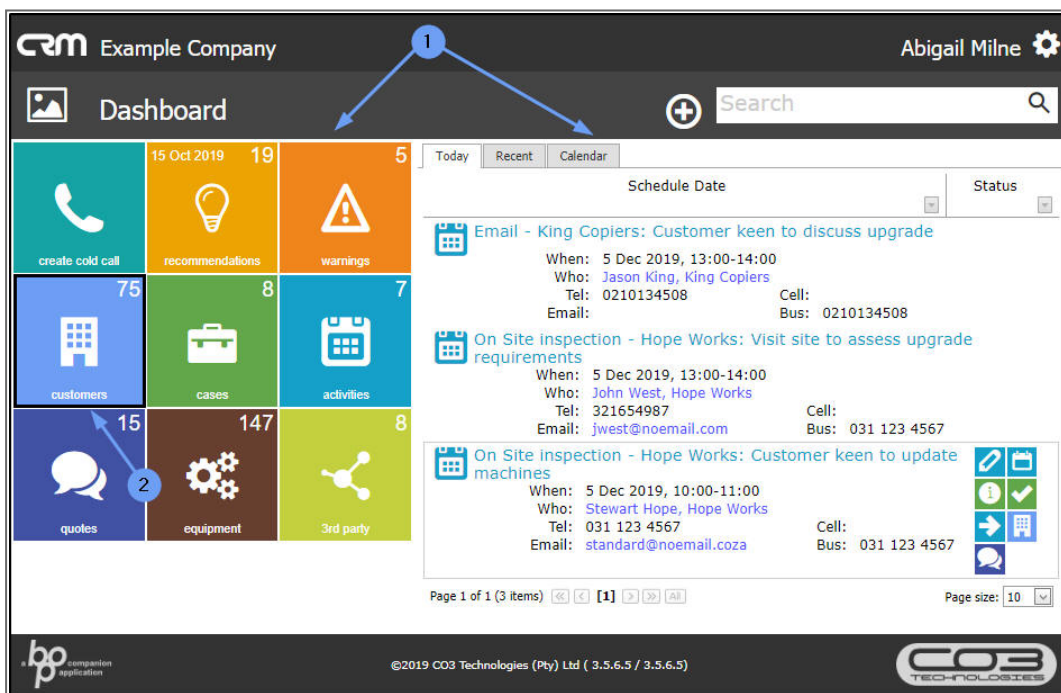
1. In the **Home** page (Dashboard),
2. Hover over or click on the **User Name** or **Settings** icon to display the **Settings** frame.
3. In the **Options** list, select the **Hide Dashboard panel** check box.



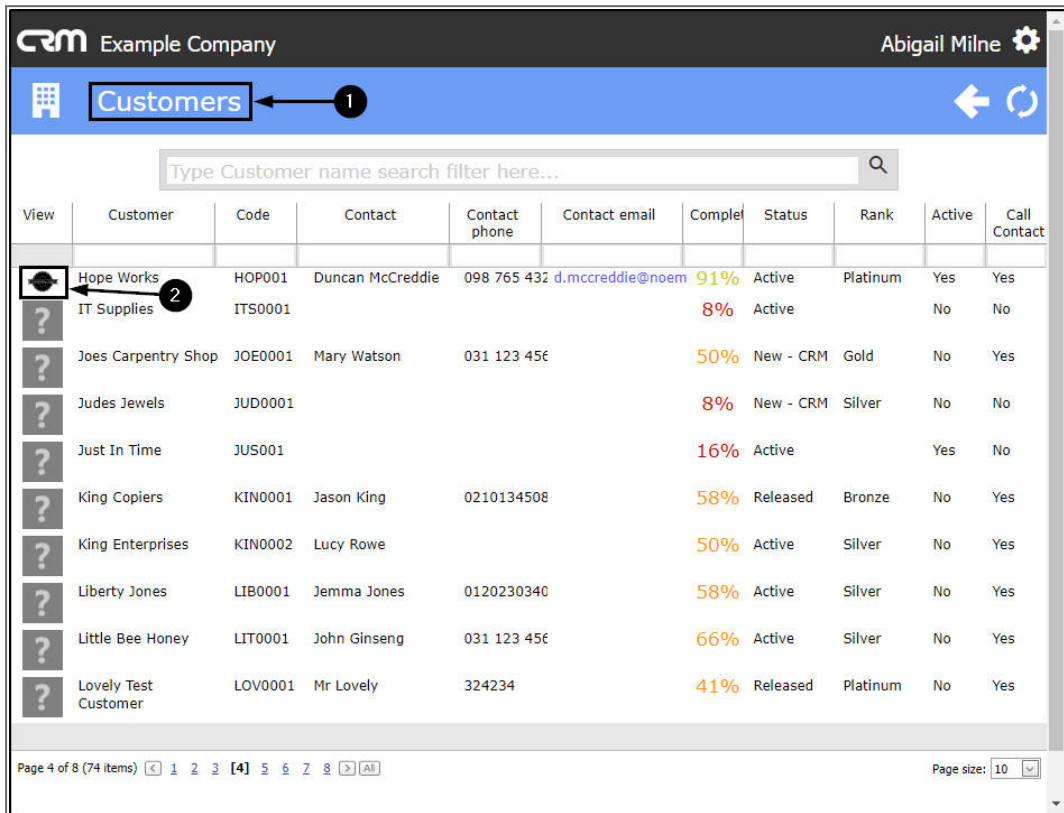
1. The Dashboard will be removed from the Home page.
2. Click anywhere outside of the Settings panel to collapse it to view the Home page fully.



1. You can now view the Home page without the Dashboard.
2. Click on the **Customers** tile.



1. The **Customers** listing page will open.
2. Select any Customer by clicking on the **Customer icon** in the **View** column.



1. The selected **Customer Home** page will open.
2. The Dashboard will also be hidden in this page.



## RE-INSTATE THE DASHBOARD VIA CUSTOMER HOME PAGE

The process to **re-instate** the Dashboard is the same from either the **Home page** or **Customer Home page**. For the purpose of this manual we explain the process from the **Customer Home page**.

1. In the **Customer Home page**,
2. Hover over or click on the **User Name** or **Settings** icon.

The screenshot shows the CRM interface for 'Example Company' with the user 'Abigail Milne'. The 'Hope Works' account page is displayed, featuring a navigation menu on the left with options like 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'Res'. The main content area shows the account details for 'Hope Works - HOP001', including trading and registered names, VAT number, registration number, rank, website, and phone number. A '12 Months Sales History' chart is also present, showing 'Contract Income' and 'Sales Revenue' from January 2018 to January 2019. A settings gear icon is located in the top right corner of the interface.

1. The **Settings** frame will be displayed.
2. **Deselect** the **Hide Dashboard panel** check box.

The screenshot shows a CRM dashboard for 'Example Company' with user 'Abigail Milne'. The dashboard includes a grid of functional tiles such as 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. A settings panel is open, displaying options like 'Show items for subordinates', 'Exclude deleted customers in search on Cold Call screen', 'Hide dashboard panel', and 'Hide dashboard panel on customer page'. A '12 Months Sales History' bar chart is also visible, showing 'Contract Income' and 'Sales Revenue' from January 2018 to January 2019.

1. As you deselect the Hide Dashboard panel option,
2. A message box will pop up in the Settings panel advising you to
  - **Refresh page to show dashboard.**

The screenshot shows a CRM dashboard for 'Example Company' with user 'Abigail Milne'. The dashboard features a grid of functional tiles such as 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. A settings menu is open, displaying options: 'Show items for subordinates', 'Exclude deleted customers in search on Cold Call screen', 'Hide dashboard panel', and 'Hide dashboard panel on customer page'. A 'Refresh page to show dashboard' button is highlighted. Below the settings, a '12 Months Sales History' bar chart is visible, showing 'Contract Income' and 'Sales Revenue' from January 2018 to January 2019. The chart shows a significant drop in sales revenue in January 2019.

Month	Contract Income	Sales Revenue
January 2018	0	0
February 2018	0	0
March 2018	0	0
April 2018	0	0
May 2018	0	0
June 2018	0	0
July 2018	0	0
August 2018	0	0
September 2018	0	0
October 2018	0	0
November 2018	0	0
December 2018	0	0
January 2019	0	-350

- Refresh the page.



The screenshot shows a web browser window with the URL `localhost:50000/BPOCRM/ViewCustomer.aspx?CustomerID=2`. The page title is "Example Company" and the user is "Abigail Milne". The main content area is titled "Hope Works - HOP001" and features a grid of 18 navigation tiles: create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files. To the right of the tiles is a company information panel for "Hope Works" with details like VAT No, Registration, Rank, Website, and Phone. Below this is a "12 Months Sales History" bar chart showing zero values for both Contract Income and Sales Revenue from January 2018 to January 2019. The footer includes the CO3 Technologies logo and copyright information.

1. The Dashboard panel can now be viewed in the Customer Home page.
2. Click on the **CRM logo** to return to the **Home** page.

The screenshot displays a CRM dashboard for 'Example Company' (user: Abigail Milne). The main section is for 'Hope Works' (HOP001). It includes a table for activities, performance charts for the last month and a 4-month pipeline, a navigation grid, and a 12-month sales history chart.

Description	Target	Existing Custmrs	New Custmrs
Email	30	0	2
Meeting	20	1	0
On Site inspection	20	0	0
Phone call	20	0	0

Category	Value
Cases	~15,000.00
Invoices	~12,000.00
Orders	~12,000.00
Quotes	~25,000.00

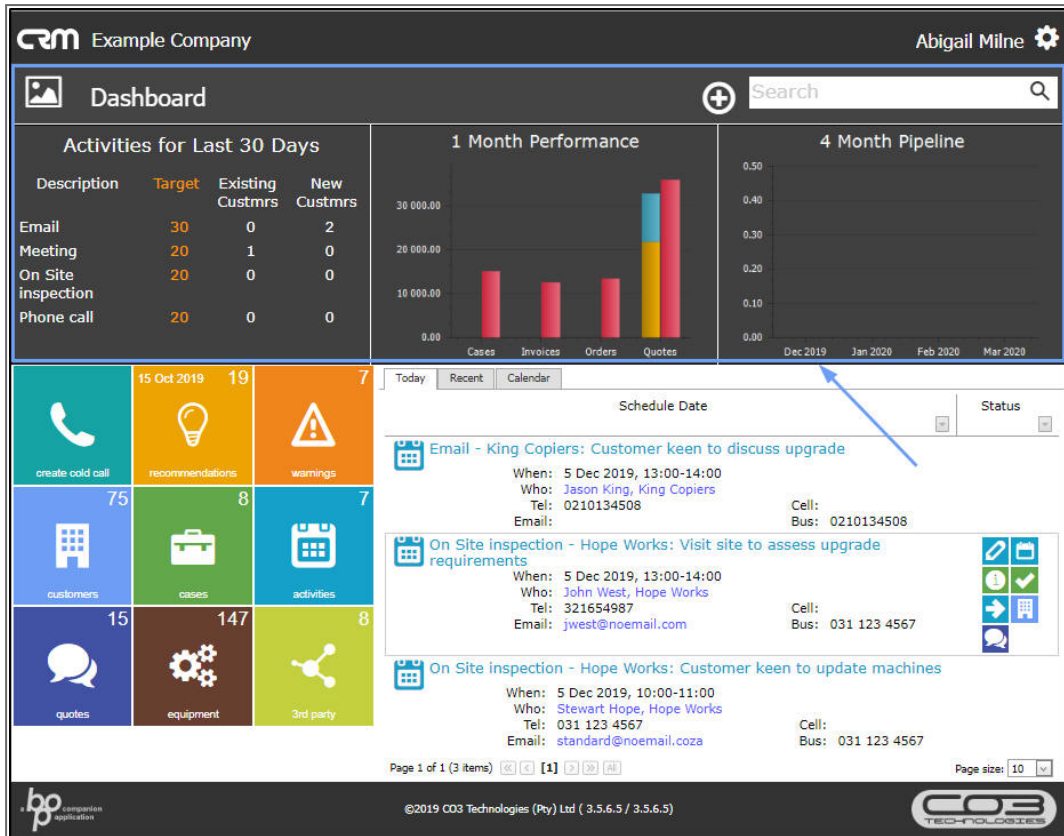
Month	Value
Dec 2019	0.00
Jan 2020	0.00
Feb 2020	0.00
Mar 2020	0.00

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

Trading Name	Hope Works
Registered Name	Hope Works (Pty) Lts
Description	
VAT No	987654321
Registration	123456789
Rank	Platinum
Website	www.hopeworks.co.za
Phone	031 123 4567

Month	Contract Income	Sales Revenue
January 2018	0	0
February 2018	0	0
March 2018	0	0
April 2018	0	0
May 2018	0	0
June 2018	0	0
July 2018	0	0
August 2018	0	0
September 2018	0	0
October 2018	0	0
November 2018	0	0
December 2018	0	0
January 2019	~350	~350

1. The Dashboard panel can also now be viewed in the **Home** page again.



## HIDE DASHBOARD PANEL ON CUSTOMER PAGE

Hiding the Dashboard panel on the Customer Home page will give you more space to view the details in this page. This selection will not hide the Dashboard panel on the Home page.

You can select this setting option either from the **Home** page or from the **Customer Home** page.

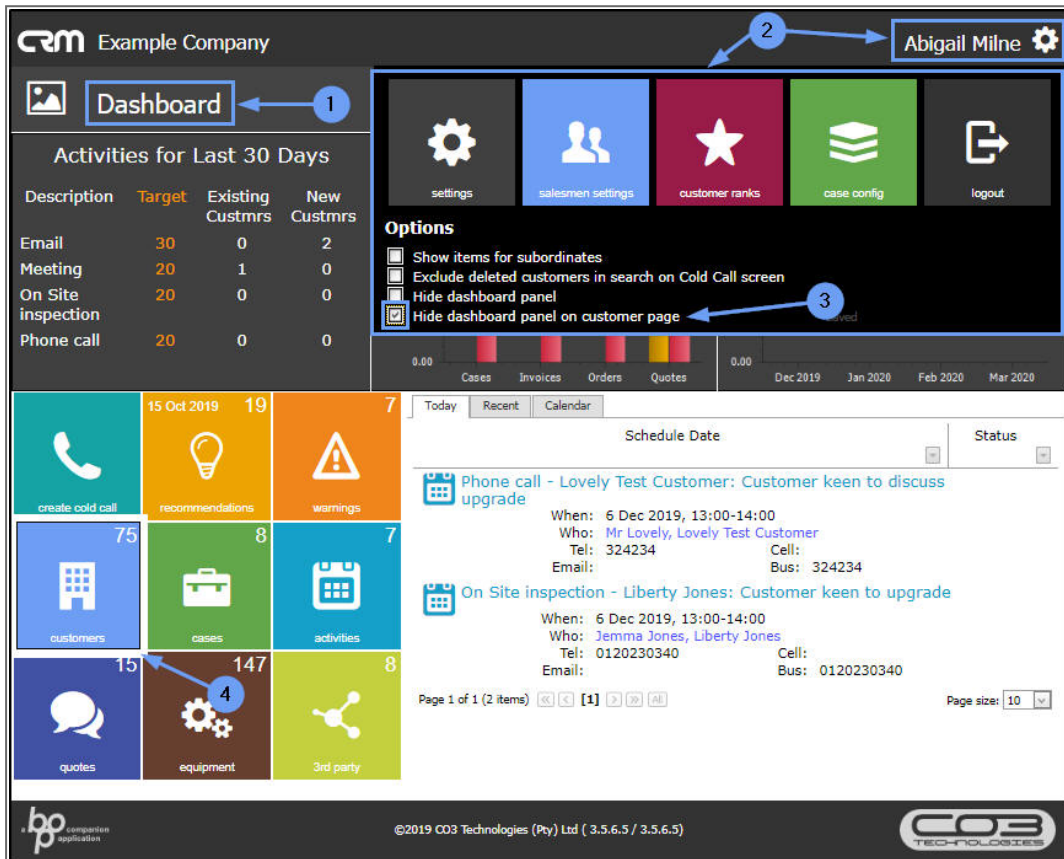
## SELECT OPTION FROM HOME PAGE

1. In the **Home** page,
2. Hover over or click on the **User Name** or **Settings** icon to display the **Settings** frame.

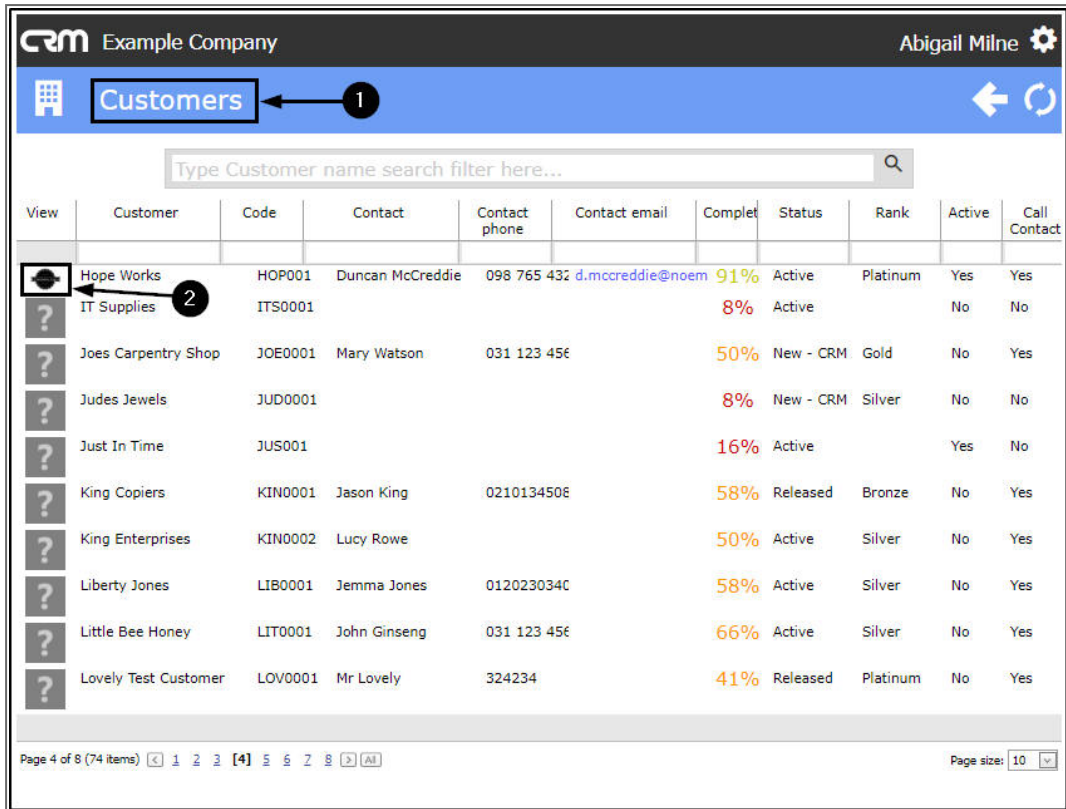
- In the **Options** list, select the **Hide dashboard panel on customer page** check box.

To see the result of this selection, you will need to navigate to a **Customer Home** page.

- Click on the **Customers** tile.



- The **Customers** listing page will open.
- Click on any **Customer icon** in the **View** column.



1. The **Customer Home** page will open.
2. The Dashboard will be **hidden** in this page.
3. Click on the **CRM logo** to return to the Home page.

The screenshot shows the CRM interface for 'Example Company' with user 'Abigail Milne'. The main view is for customer 'Hope Works - HOP001'. The left navigation menu contains various functional tiles. The right panel displays customer details and a sales history chart.

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

Field	Value
Trading Name	Hope Works
Registered Name	Hope Works (Pty) Lts
Description	
VAT No	987654321
Registration	123456789
Rank	Platinum
Website	www.hopeworks.co.za
Phone	031 123 4567

Month	Contract Income	Sales Revenue
January 2018	0	0
February 2018	0	0
March 2018	0	0
April 2018	0	0
May 2018	0	0
June 2018	0	0
July 2018	0	0
August 2018	0	0
September 2018	0	0
October 2018	0	0
November 2018	0	0
December 2018	0	0
January 2019	0	-350

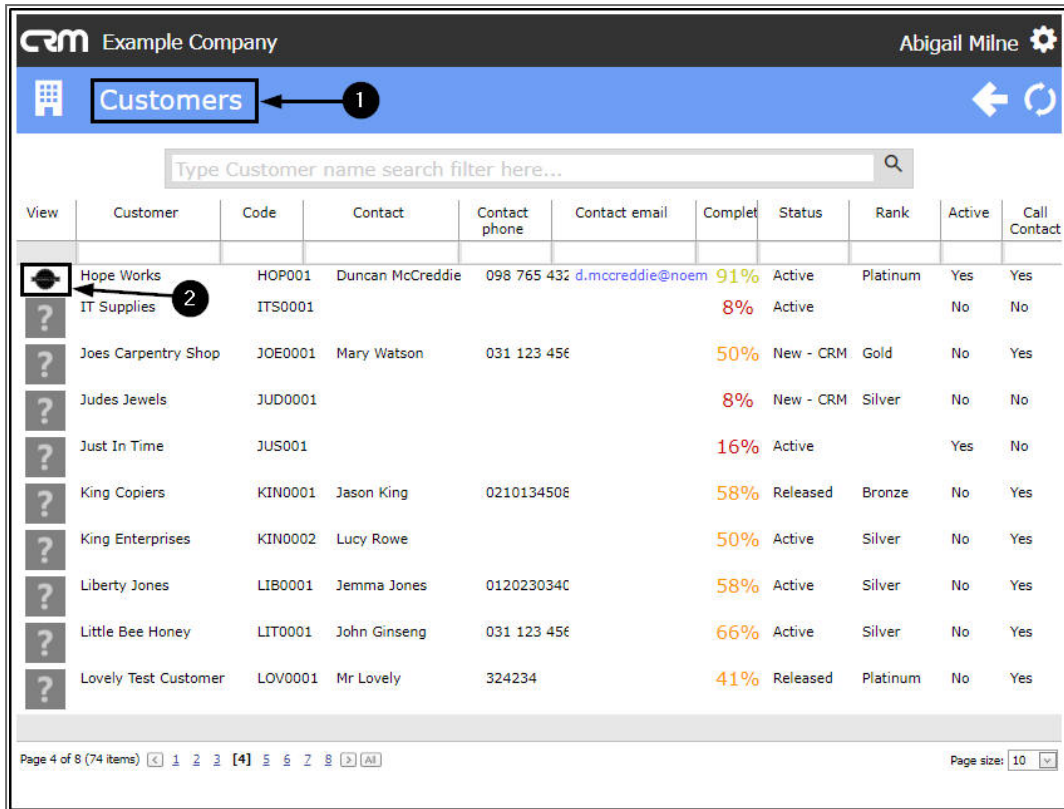
## SELECT OPTION FROM CUSTOMER HOMEPAGE

1. In the **Home** page,
2. Click on the **Customers** tile.

The screenshot shows a CRM dashboard for 'Example Company' with user 'Abigail Milne'. The dashboard includes a navigation menu with 'Dashboard' highlighted (Step 1), a search bar, and several data visualization widgets. A grid of widgets includes 'customers' (75), 'cases' (8), 'activities' (7), 'quotes' (15), 'equipment' (147), and '3rd party' (8). Step 2 points to the 'customers' widget. The main content area displays a list of activities with details for 'Phone call - Lovely Test Customer' and 'On Site inspection - Liberty Jones'.

1. The **Customers** listing page will open.
2. Click on a **Customer icon** in the **View** column.





1. The **Customer Home** page will open.
2. Hover over or click on the **User Name** or **Settings** icon to display the **Settings** frame.
3. In the **Options** list, select the **Hide Dashboard panel on customer page** check box.

The screenshot shows the CRM interface for 'Example Company' with user 'Abigail Milne'. The 'Hope Works' dashboard is active. A settings panel is open, showing options for 'Options' with three checkboxes: 'Show items for subordinates', 'Exclude deleted customers in search on Cold Call screen', and 'Hide dashboard panel'. The third checkbox is checked and highlighted with a blue circle and arrow labeled '3'. A blue circle and arrow labeled '2' points to the user profile 'Abigail Milne' in the top right. A blue circle and arrow labeled '1' points to the 'Hope Works' header in the top left. Below the settings panel, a '12 Months Sales History' bar chart is visible, showing a significant drop in sales revenue in January 2019.

Description	Target	Existing Custmrs	New Custmrs
Email	30	0	2
Meeting	20	1	0
On Site inspection	20	0	0
Phone call	20	0	0

<input type="checkbox"/>	Show items for subordinates
<input type="checkbox"/>	Exclude deleted customers in search on Cold Call screen
<input type="checkbox"/>	Hide dashboard panel
<input checked="" type="checkbox"/>	Hide dashboard panel on customer page

Month	Contract Income	Sales Revenue
January 2018	0	0
February 2018	0	0
March 2018	0	0
April 2018	0	0
May 2018	0	0
June 2018	0	0
July 2018	0	0
August 2018	0	0
September 2018	0	0
October 2018	0	0
November 2018	0	0
December 2018	0	0
January 2019	0	-350

1. As you **select** the check box,
2. The Dashboard will be **hidden** in the page.
3. Click anywhere outside of the Settings frame to **collapse** it.

The screenshot shows the CRM interface for 'Example Company' with user 'Abigail Milne'. The left sidebar contains various modules like 'create cold call', 'recommendations', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The top right has navigation buttons for 'settings', 'salesmen settings', 'customer ranks', 'case config', and 'logout'. An 'Options' panel is open, showing settings for 'Hide dashboard panel' and 'Hide dashboard panel on customer page'. A '12 Months Sales History' chart is displayed, showing 'Contract Income' and 'Sales Revenue' for each month from January 2018 to January 2019. The chart shows zero values for both metrics throughout the period.

1. You can now view the whole page **without** the Dashboard
2. Click on the **CRM logo** to return to the **Home page**.

CRM Example Company 2 Abigail Milne

## Hope Works

Hope Works - HOP001

Trading Name: Hope Works  
Registered Name: Hope Works (Pty) Lts  
Description: 91%  
VAT No: 987654321  
Registration: 123456789  
Rank: Platinum  
Website: www.hopeworks.co.za  
Phone: 031 123 4567

### 12 Months Sales History

Month	Contract Income	Sales Revenue
January 2018	0	0
February 2018	0	0
March 2018	0	0
April 2018	0	0
May 2018	0	0
June 2018	0	0
July 2018	0	0
August 2018	0	0
September 2018	0	0
October 2018	0	0
November 2018	0	0
December 2018	0	0
January 2019	0	0

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- The Dashboard is still **visible** in this page.

CRM Example Company
Abigail Milne

Dashboard 
Search

### Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Email	30	0	2
Meeting	20	1	0
On Site inspection	20	0	0
Phone call	20	0	0

### 1 Month Performance

### 4 Month Pipeline

15 Oct 2019 19  
create cold call

19  
recommendations

7  
warnings

75  
customers

8  
cases

7  
activities

15  
quotes

147  
equipment

8  
3rd party

Today Recent Calendar
Schedule Date 
Status

Phone call - Lovely Test Customer: Customer keen to discuss upgrade

When: 6 Dec 2019, 13:00-14:00  
 Who: Mr Lovely, Lovely Test Customer  
 Tel: 324234 Cell: 324234  
 Email: Bus: 324234

On Site inspection - Liberty Jones: Customer keen to upgrade

When: 6 Dec 2019, 13:00-14:00  
 Who: Jemma Jones, Liberty Jones  
 Tel: 0120230340 Cell: 0120230340  
 Email: Bus: 0120230340

Page 1 of 1 (2 items) 
Page size:

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