

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

## CRM CUSTOMERS

### CUSTOMERS DASHBOARD

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**.

The **Customer Dashboard** is where you can view and access all of the selected customer details and information.

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

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### ACCESS THE CUSTOMER DASHBOARD

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

CRM Example Company Abigail Milne

**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**

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

30 Sep 2016 0 6

create cold call recommendations warnings

74 6 6

customers cases activities

6 147 0

quotes equipment 3rd party

Today Recent Calendar

Schedule Date Status

No data to display

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1. The **Customers** listing page will be open.
2. You can use the **Page Reference field**,
3. the **Filter Row** or
4. the **Filter Text Box** to search for your customer.
5. Click on the selected customer icon in the **View** column.

The screenshot shows the CRM interface for 'Example Company' with the user 'Abigail Milne'. The main navigation bar includes a 'Customers' tile (callout 1) and a search filter (callout 4). Below the navigation is a table of customer records. Callout 5 points to the 'Customers' tile, callout 3 points to a customer record, and callout 2 points to the pagination controls at the bottom of the table.

View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
	Hope Works	HOP001	Duncan McCreddie	098 765 432	d.mccreddie@noem	91%	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%	Active	Silver	No	Yes
	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	Active	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

## VIEW CUSTOMER DASHBOARD TILES / PAGE LINKS

1. The **Customer Dashboard** (Customer Home page) will open.
2. Most of the page tiles will link you to information specific to the customer you have selected to view,
3. With the exception of the **Customers** tile which will take you back to the **Customers listing** page.



1. In this **Customer Dashboard**,
2. You will find the same tiles that you have available in the **Dashboard** (Home page):

- **Create Cold Call**
- **Recommendations**
- **Warnings**
- **Customers**
- **Cases**
- **Activities**
- **Quotes**



- [Equipment](#)
- [Third Party](#)

CRM Example Company

Dashboard

### 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 Per

Category	Value
Cases	15 000.00
Invoices	0.00

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

Today
Recent
Calendar

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CRM Example Company

🏢
Hope Works
1

### 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 Per

Category	Value
Cases	15 000.00
Invoices	0.00

📞  
create cold call

💡  
recommendations

⚠️  
warnings

🏢  
customers

👜  
cases

📅  
activities

💬  
quotes

📄  
orders

🔄  
invoices

↶  
credit notes

⚙️  
equipment

🏆  
contracts

📞  
service calls

🌐  
3rd party

📁  
files

### Hope Works - HOP001

Created: 2014/04/03 1:46:44 PM

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📞
📄
📅

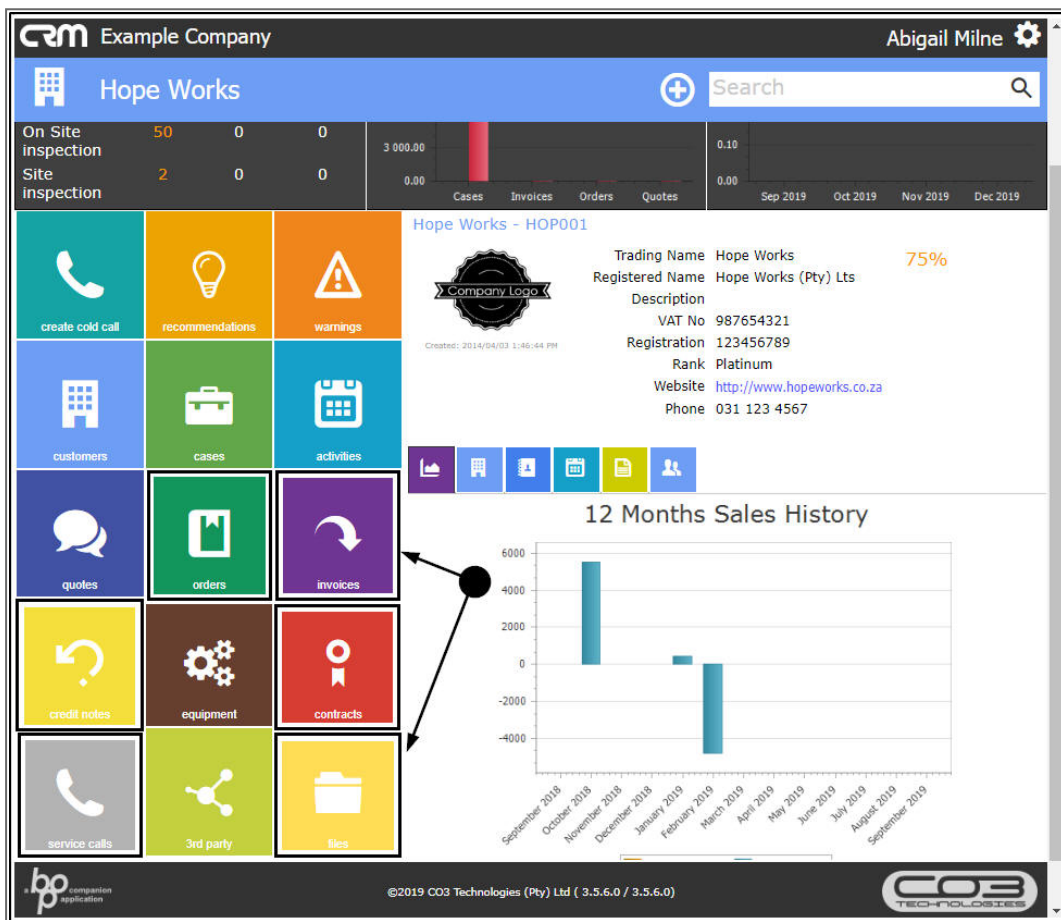
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business  
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- You will also find the following additional Information tiles in this page:

- **Orders**
- **Invoices**
- **Credit Notes**
- **Contracts**
- **Service Calls**
- **Files**



## VIEW CUSTOMER ACTION BUTTONS

- In the **Customer Dashboard** you can view and access the following information via the customer **Actions buttons**:



**Note:** Hover anywhere over the customer information frame to display these buttons.

- [View/Edit Customer](#)
- [Add Contact](#)
- [Add Third Party](#)
- [Add Note](#)
- [Release Customer](#)
- [Maintain Customer Salesmen](#)
- [Create Cold Call](#)
- [Add New Activity](#)
- [Add New Non-Case Related Quote](#)

2. Click on an individual button to direct you to the relevant **Action** page.



## VIEW ADDITIONAL CUSTOMER DETAILS TILES

- You can also view and access more customer information via the customer **Details** tiles :
  - Sales
  - Addresses
  - Contacts
  - Open Activities
  - Notes
  - Salesmen



## SETTINGS - 'HIDE DASHBOARD PANEL ON CUSTOMER PAGE' CHECKBOX

If you wish to have more space on this page to view your customer information more clearly, you can change your page **Settings**.

- Click on the **Settings** icon.



1. The **Setting** panel will be expanded.
2. Select the **'Hide dashboard panel on customer page'** checkbox.

The screenshot displays the CRM interface for 'Example Company' (CRM) with the user 'Abigail Milne'. The main header shows 'Hope Works' and a settings icon. Below this is a table of activities for the last 30 days:

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

To the right, there are navigation buttons for settings, salesmen settings, customer ranks, case config, and logout. Below these is an 'Options' section with checkboxes for: 'Show items for subordinates', 'Exclude deleted customers in search on Cold Call screen', 'Hide dashboard panel', and 'Hide dashboard panel on customer page'. A blue arrow labeled '1' points to the 'Hide dashboard panel' checkbox, and another blue arrow labeled '2' points to the 'Hide dashboard panel on customer page' checkbox.

The main content area shows 'Hope Works - HOP001' with a 75% completion indicator. It includes a company logo, trading name, registered name, VAT number, registration number, rank (Platinum), website, and phone number. Below this is a '12 Months Sales History' bar chart showing sales revenue and contract income from September 2018 to September 2019.

1. As you select the check box,
2. The **Dashboard panel** will disappear from the screen.

The screenshot shows the CO3 CRM interface for 'Example Company' user 'Abigail Milne'. The dashboard is titled 'Hope Works' and contains a grid of functional tiles: create cold call, recommendations, warnings (with a '2' annotation), customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files. A settings panel is open, showing 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' (with a '1' annotation). A '12 Months Sales History' bar chart displays 'Contract Income' (yellow) and 'Sales Revenue' (blue) from September 2018 to September 2019. The chart shows a significant peak in Sales Revenue in October 2018 and a significant dip in Contract Income in March 2019.

Month	Contract Income	Sales Revenue
September 2018	0	0
October 2018	0	5000
November 2018	0	0
December 2018	0	0
January 2019	0	0
February 2019	0	0
March 2019	-4000	0
April 2019	0	0
May 2019	0	0
June 2019	0	0
July 2019	0	0
August 2019	0	0
September 2019	0	0

- Click outside of the Settings frame to view the full page without the Dashboard.

CRM Example Company
Abigail Milne

Hope Works

+ Search 🔍

📞  
create cold call

💡  
recommendations

⚠️  
warnings

🏢  
customers

👜  
cases

📅  
activities

💬  
quotes

📄  
orders

🔄  
invoices

📝  
credit notes

⚙️  
equipment

🏆  
contracts

📞  
service calls

🤝  
3rd party

📁  
files

### Hope Works - HOP001

Trading Name Hope Works 75%

Registered Name Hope Works (Pty) Lts

Description

VAT No 987654321

Registration 123456789

Rank Platinum

Website <http://www.hopeworks.co.za>

Phone 031 123 4567

Created: 2014/04/03 1:46:44 PM

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📅
👤
📄
📁
👥

#### 12 Months Sales History

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

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CRM.002.001

