

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

CRM CUSTOMERS

WARNINGS

Warnings are notifications of overdue activities, that can be directly actioned.

A full list of warnings can be accessed from the Dashboard (Home page).

Client-specific warnings can be accessed from the from the Customer Dashboard as set out below.

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

ACCESS WARNINGS FROM THE DASHBOARD (HOME PAGE)

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

The screenshot shows a CRM dashboard for 'Example Company' with user 'Abigail Milne'. The dashboard includes a 'Dashboard' menu, a search bar, and several performance charts. A 'Warnings' widget is highlighted with a red circle and an arrow pointing to a detailed view of a warning for 'King Enterprises'.

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	5
Email	120	0	2
Meeting	40	0	1
On Site Inspection	50	0	1
Site inspection	2	0	0

Category	Value
Cases	~15,000.00
Invoices	~9,000.00
Orders	~6,000.00
Quotes	~3,000.00

Month	Value
Jul 2019	~6,000.00
Aug 2019	~1,000.00
Sep 2019	~2,000.00
Oct 2019	~1,000.00

Widget	Value
create cold call	0
recommendations	5
warnings	5
customers	74
cases	9
activities	9
quotes	5
equipment	147
3rd party	4

Warning Details:

- Subject:** Phone call - King Enterprises: Confirm meeting times with new Purchasing Manager
- When:** 23 Jul 2019, 17:00-18:00
- Who:** Jason King, King Enterprises
- Tel:** [Redacted]
- Cell:** 0123456789
- Bus:** 0123456789

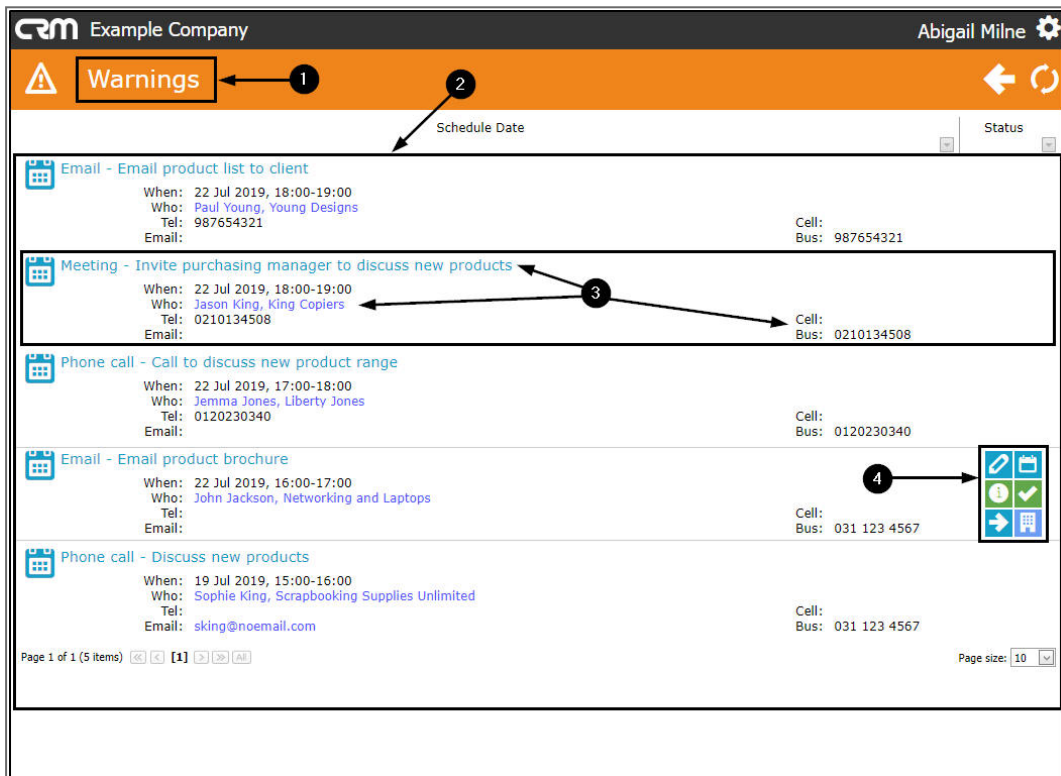
THE WARNINGS SCREEN (ALL CUSTOMERS)

1. The **Warnings** page will be displayed.
2. Here you can view all the warnings - where you have activities pending.
3. Each warning lists:
 - The activity **subject**
 - **When** the activity was scheduled for
 - **Who** the activity was scheduled with
 - **Contact details** for the activity:
 - Tel:
 - Email:
 - Cell:
 - Business No:

WARNINGS 'ACTION ITEM' BUTTONS

4. Hover over any activity to reveal the **Action Item** buttons:

- **View / Edit this Activity**
- **Reschedule this Activity**
- **View Case info and history**
- **Close this case**
- **Next Action** (close current activity and create new activity)
- **View customer**



VIEW ACTIVITY SUMMARY

1. **Single click** on any Activity.
2. To access a **quick view summary** of the Activity information.

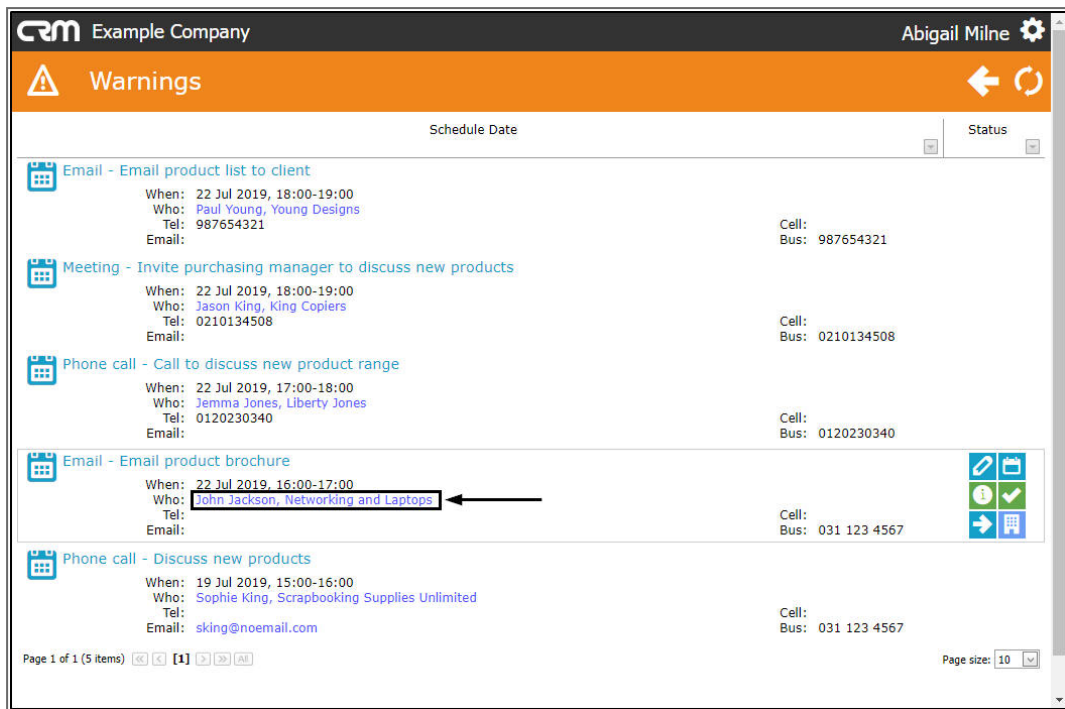
The screenshot shows a CRM interface titled "Warnings" for "Example Company". The user "Abigail Milne" is logged in. The interface displays a list of activities with columns for "Schedule Date" and "Status".

Activity	When	Who	Tel	Email	Cell	Bus
Email - Email product list to client	22 Jul 2019, 18:00-19:00	Paul Young, Young Designs	987654321		987654321	
Meeting - Invite purchasing manager to discuss new products	22 Jul 2019, 18:00-19:00	Jason King, King Copiers	0210134508		0210134508	
Phone call - Call to discuss new product range	22 Jul 2019, 17:00-18:00	Jemma Jones, Liberty Jones	0120230340		0120230340	
Phone call - Discuss new products	19 Jul 2019, 15:00-16:00	Sophie King, Scrapbooking Supplies Unlimited		sking@noemail.com	031 123 4567	031 123 4567

Callout 1 points to the "Who" field of the "Phone call - Call to discuss new product range" activity. Callout 2 points to the "Where" field of the same activity, which contains the text: "Where: 22 River House, River Way, River Town, River City, Case: Potential New Deal, Comments: Client updating machines, Completion Notes:".

NAVIGATE TO THE CUSTOMER DASHBOARD

- Click on the blue link in the **Who** field of any of the Activities.



1. The selected **Customer Dashboard** screen will be displayed.
2. Here you can view the **Customer/Company details** and **12 Months Sales History**.
3. A panel of **Links** tiles can direct you to further information regarding this customer.

ACCESS WARNINGS FROM THE CUSTOMER DASHBOARD

4. Click on the **Warnings** tile.

The screenshot shows a CRM dashboard for 'Example Company' with user 'Abigail Milne'. The main navigation bar includes a menu icon, the text 'Networking and Laptops', and a search bar. Below the navigation bar, there are three main sections: 'Activities for Last 30 Days', '1 Month Performance', and '4 Month Pipeline'. The 'Activities for Last 30 Days' section contains a table with the following data:

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	5
Email	30	0	2
Meeting	40	0	1
On Site inspection	50	0	1
Site inspection	2	0	0

The '1 Month Performance' section shows a bar chart for 'Cases', 'Invoices', 'Orders', and 'Quotes'. The '4 Month Pipeline' section shows a bar chart for 'Jul 2019', 'Aug 2019', 'Sep 2019', and 'Oct 2019'. A central panel displays customer details for 'Networking and Laptops - NET001', including a 50% completion indicator and fields for Trading Name, Registered Name, Description, VAT No, Registration, Rank, Website, and Phone. A '12 Months Sales History' chart is also visible. A left-hand navigation menu contains icons for various actions like 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. Numbered callouts (1-4) point to specific elements: 1 points to the 'Networking and Laptops' menu item, 2 points to the customer details panel, 3 points to the 'warnings' icon in the navigation menu, and 4 points to the 'warnings' icon in the top navigation bar.

1. The **customer specific** warning screen will be displayed.
2. Here you can only view the warnings for that particular customer.
 - Follow the steps as explained above to **reveal the warnings action buttons** or **view the activity summary**.
3. Click on **Back** to return to the previous page.
4. Click on the **Customer icon** to return to the Customer page.

The screenshot displays a CRM interface for 'Example Company' with user 'Abigail Milne'. The main heading is 'Warnings for Networking and Laptops'. Below this, there is a 'Schedule Date' field and a 'Status' dropdown menu. A detailed warning entry is shown for 'Email - Email product brochure', scheduled for '22 Jul 2019, 16:00-17:00' and assigned to 'John Jackson, Networking and Laptops'. Contact information includes 'Cell: 031 123 4567' and 'Bus: 031 123 4567'. The interface includes pagination controls ('Page 1 of 1 (1 items)') and a 'Page size' dropdown set to '10'. Four callout numbers are present: '1' points to the warning title, '2' points to the main content area, '3' points to the navigation arrows, and '4' points to the status dropdown.

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