

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

# CRM CUSTOMERS

## CASES

A Case is like an opportunity: a reason to engage with a client in order to fulfill a sale requirement or propose a deal. A case gives rise to a [Quote](#) and subsequent New Deal.

A Case can be viewed as an umbrella over all the underlying Activities that work towards achieving a contract with that customer.

There is certain criteria required when dealing with Cases:

- A [Customer](#) is required in order to create a Case.
- A Case is required to raise an [Activity](#).
- Only one Activity per Case can be open at a time.

Customer-specific Cases can be accessed from the [Customer Dashboard](#) (Customer Home page) as set out below.

[A full list of Cases](#) can be accessed from the Dashboard (Home page).

CRM will prompt you to create a new Case, when [raising a new activity](#) for a customer.

[Quotes](#) can be added to a Case from the **Cases for [selected customer]** listing page when using the following **Action** buttons:

- **View Case Info and History**
- **View/Edit this Case**
- **New Activity**
- **New Quote**

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

## VIEW CUSTOMER SPECIFIC CASE LIST

from the **Customer Dashboard** (Home page)

To access a customer specific list of Cases from the **Customer Dashboard** (Customer Home page). You will first need to navigate to the specific Customer Home page).

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

The screenshot shows the CRM Customer Dashboard for 'Example Company' with user 'Abigail Milne'. The dashboard includes a 'Dashboard' tab, a search bar, and several performance charts. A grid of navigation tiles is visible, with the 'customers' tile highlighted and a blue arrow pointing to it. A second blue arrow points to the 'equipment' tile. An email notification for 'King Copiers' is also visible.

Description	Target	Existing Custmrs	New Custmrs
Phone call	20	4	3
Email	30	1	1
Meeting	20	0	2
On Site inspection	20	0	0
Site inspection	2	0	0

Category	Value
Cases	~15,000.00
Invoices	~18,000.00
Orders	~12,000.00
Quotes	~45,000.00

Month	Value
Oct 2019	~0.10
Nov 2019	~0.15
Dec 2019	~0.20
Jan 2020	~0.25

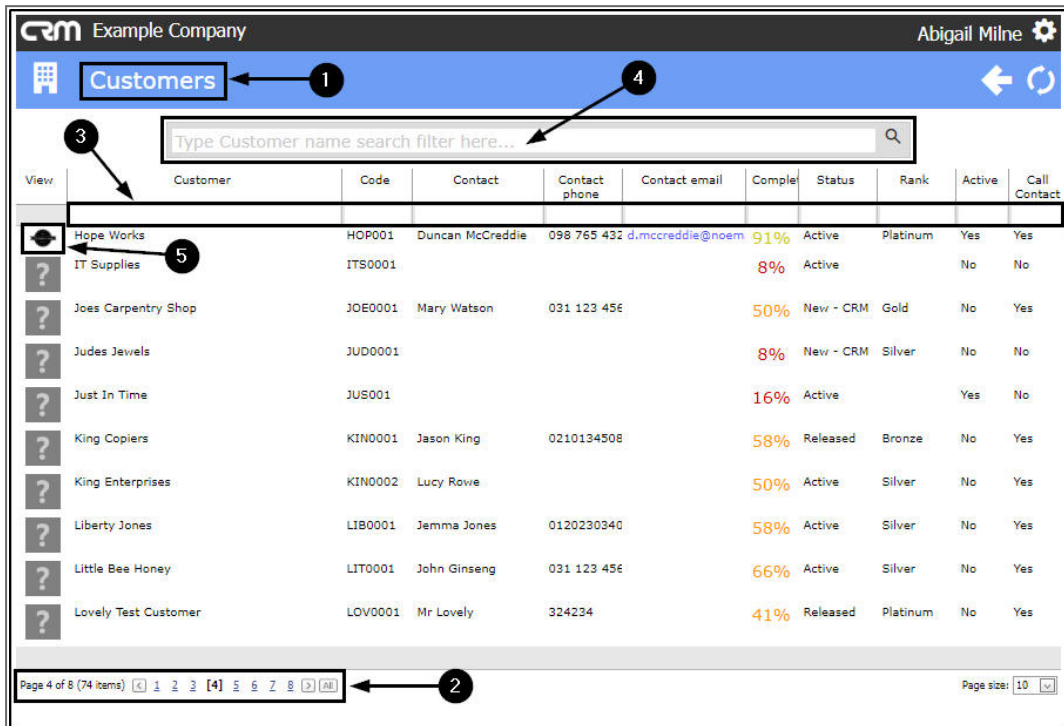
Navigation Tiles:

- create cold call (15 Oct 2019, 19)
- recommendations (9)
- warnings (9)
- customers (75)
- cases (9)
- activities (8)
- quotes (9)
- equipment (147)
- 3rd party (8)

Email Notification: Email - King Copiers: Email updated price list and provisional quote. When: 31 Oct 2019, 11:00-12:00. Who: Jason King, King Copiers. Tel: 0210134508. Cell: 0210134508. Email: [redacted].

1. The **Customers** listing page will open.
2. You can use the **Page Reference field** ,

3. the **Filter Row** or the
4. **Filter Text Box** to search for a specific customer.
5. Click on the selected customer icon in the **View** column.



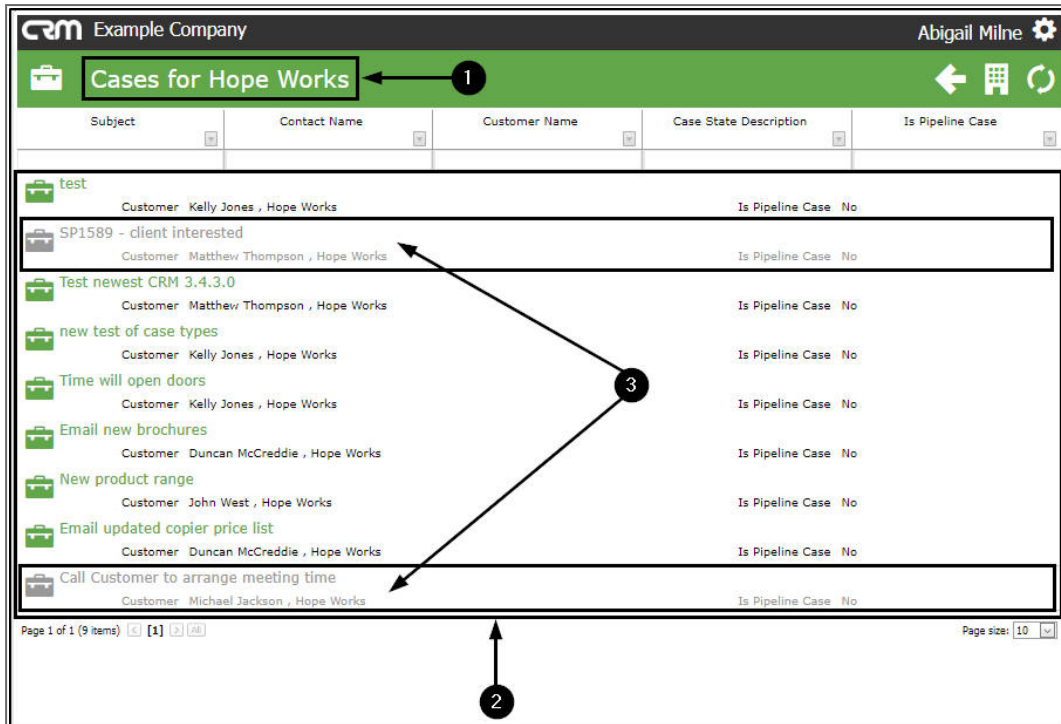
1. The selected **Customer Dashboard** (Customer Home page) will open.
2. Click on the **Cases** tile.

The screenshot displays a CRM interface for 'Example Company' with user 'Abigail Milne'. The main navigation bar shows 'Hope Works' selected. The interface includes several key components:

- Activities for Last 30 Days:** A table with columns for Description, Target, Existing Custmrs, and New Custmrs.
 

Description	Target	Existing Custmrs	New Custmrs
Phone call	20	4	3
Email	30	1	1
Meeting	20	0	2
On Site Inspection	20	0	0
Site inspection	2	0	0
- 1 Month Performance:** A bar chart showing values for Cases, Invoices, Orders, and Quotes. The Y-axis ranges from 0.00 to 50,000.00.
- 4 Month Pipeline:** A line chart showing a trend over the months of Nov 2019, Dec 2019, Jan 2020, and Feb 2020. The Y-axis ranges from 0.00 to 0.50.
- Navigation Menu:** A grid of icons for various functions: create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files. The 'cases' icon is highlighted with a red box and a '2'.
- Customer Profile (Hope Works - HOP001):**
  - Trading Name: Hope Works (91%)
  - Registered Name: Hope Works (Pty) Lts
  - Description: [Blank]
  - VAT No: 987654321
  - Registration: 123456789
  - Rank: Platinum
  - Website: <http://www.hopeworks.co.za>
  - Phone: 031 123 4567
- 12 Months Sales History:** A bar chart showing monthly sales from January 2018 to January 2019. The Y-axis ranges from -400 to 0. The legend indicates Contract Income (yellow) and Sales Revenue (blue). Only a single blue bar is visible for January 2019.

1. The **Cases** for [selected customer] page will open.
2. A list of cases pertaining to that customer will display.
3. Any **closed** Cases in this list will be greyed out.



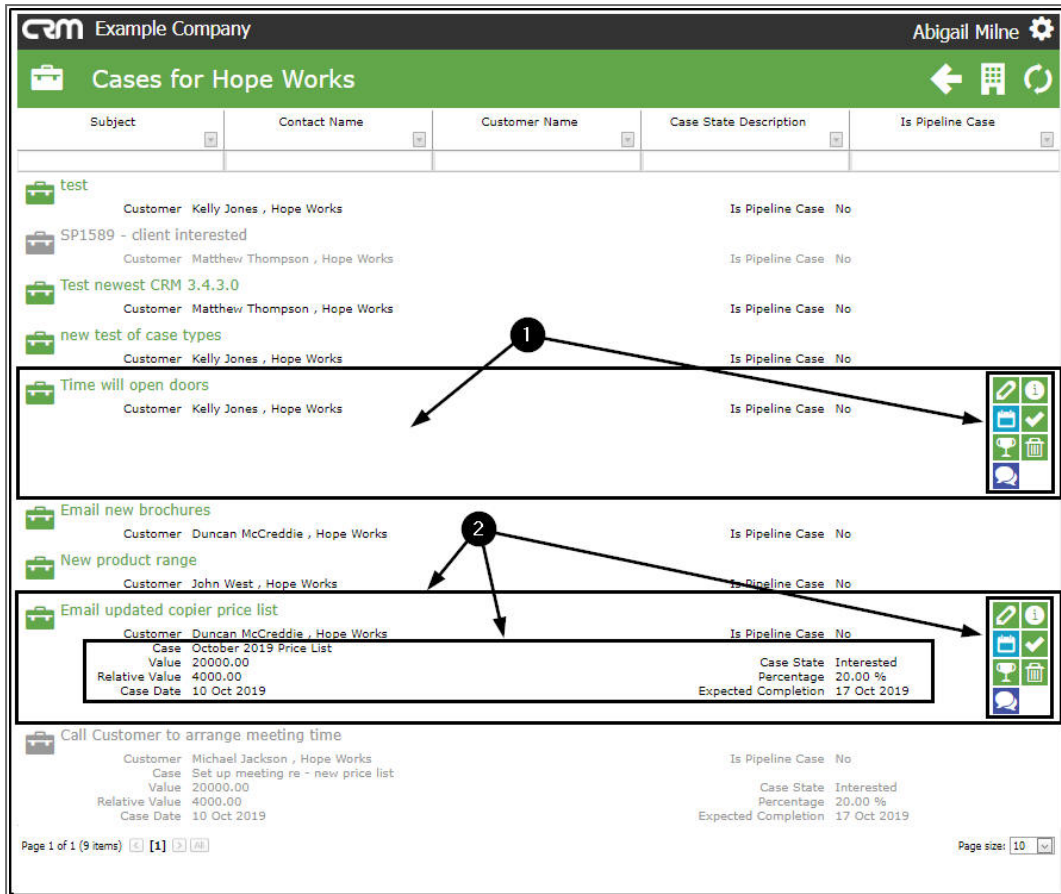
## VIEW CASE ACTION BUTTONS

1. Hover over any open Case to reveal the **Action** buttons:

- **View / Edit this Case**
- **View Case info and history**
- **New Activity**
- **Close this case**
- **Won this Case**
- **Lost this Case**
- **New Quote**

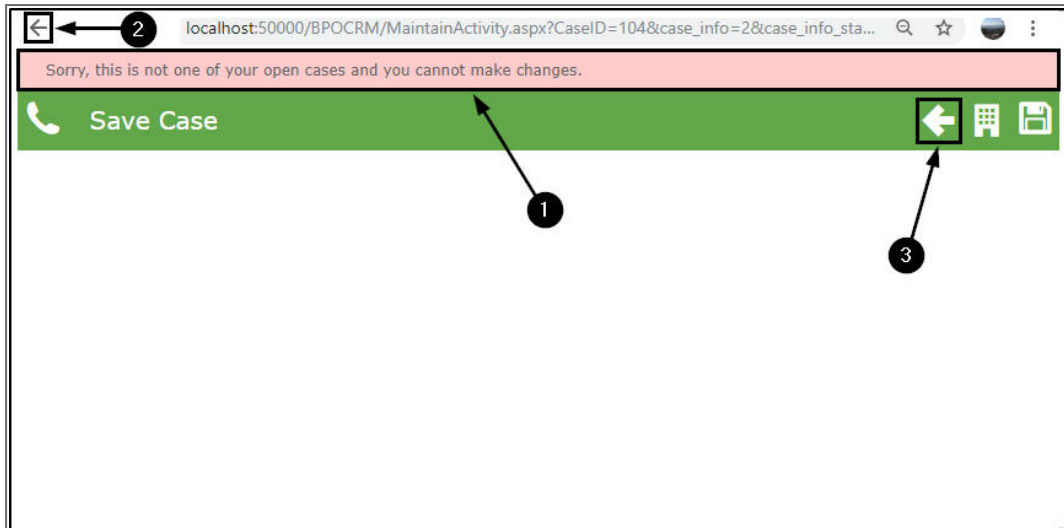
## VIEW CASE SUMMARY

2. **Single click** on any Case to access a **Summary** of the Case information and if it is an open case, this will also cause the the **Action buttons** to be displayed. \ (Closed cases will only display the Summary.)



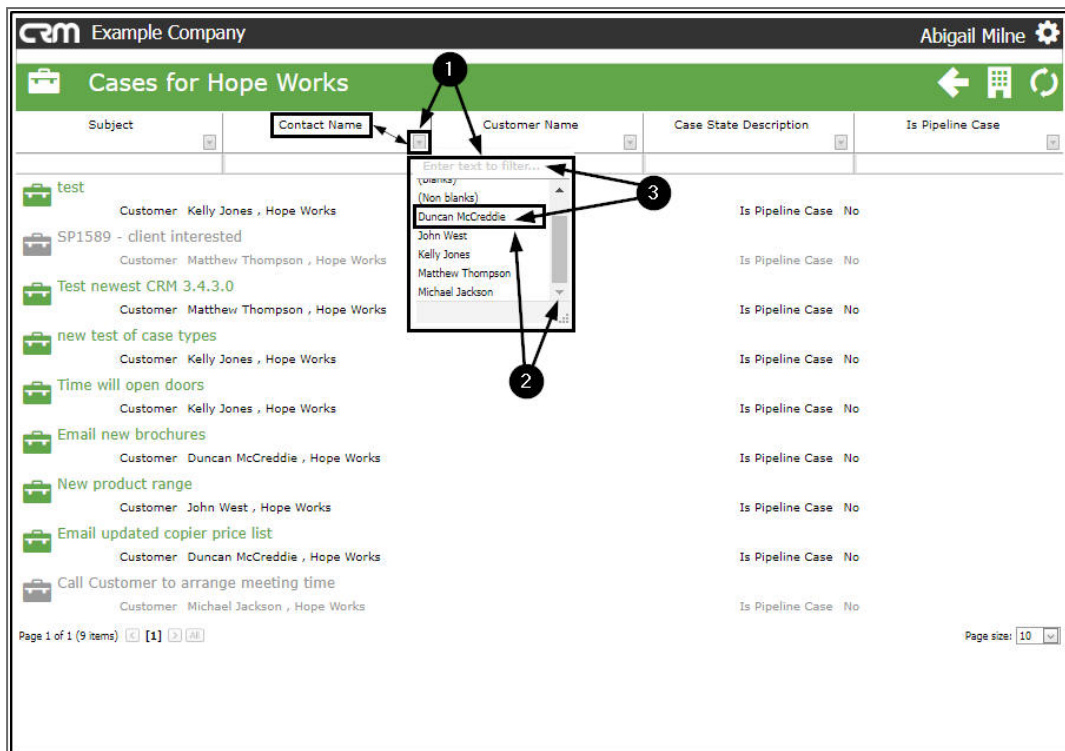
## ON CASES WHERE YOU ARE NOT THE SALESMAN

1. If you try and use the Action buttons for a Customer that is linked to another Salesman, then an error message will appear at the top of the page:
  - **Sorry, this is not one of your open cases and you cannot make changes.**
2. Click on the **Back** arrow or
3. The **Back** button to return to the **Cases for [selected customer]** page.



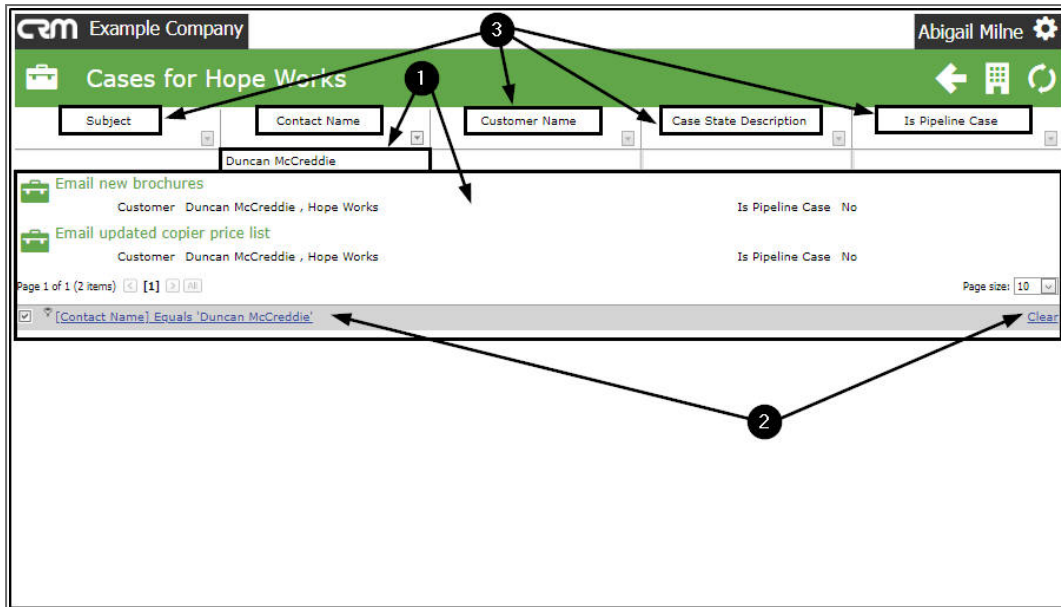
## SEARCH FOR CASES USING THE FILTER ROW AND FILTER LIST FUNCTIONALITY

1. You can click on a **filter arrow** to display the applicable drop-down menu.
  - In this example, the selected filter arrow is in the **Contact Name** column, therefore the menu displayed will list all the contact names linked to your cases.
2. Either **scroll** through the list to find the relevant contact name from the menu.
3. Or use the **filter box** to type in the relevant contact name, the system will search for the name as you type. Click on the name.



1. The **Cases for [selected customer]** page will now list only the cases linked to this contact name.
2. The **filter row** will display the filter sequence. You can click on **Clear** to remove any filter(s). The page will then display all the Cases linked to the customer list again.
3. You can search for specific cases in this way using any of the columns:
  - **Subject**
  - **Customer Name**
  - **Case State Description**
  - **Is Pipeline Case**
 and a combination of columns if required e.g. **Customer Name** and **Case Description**.



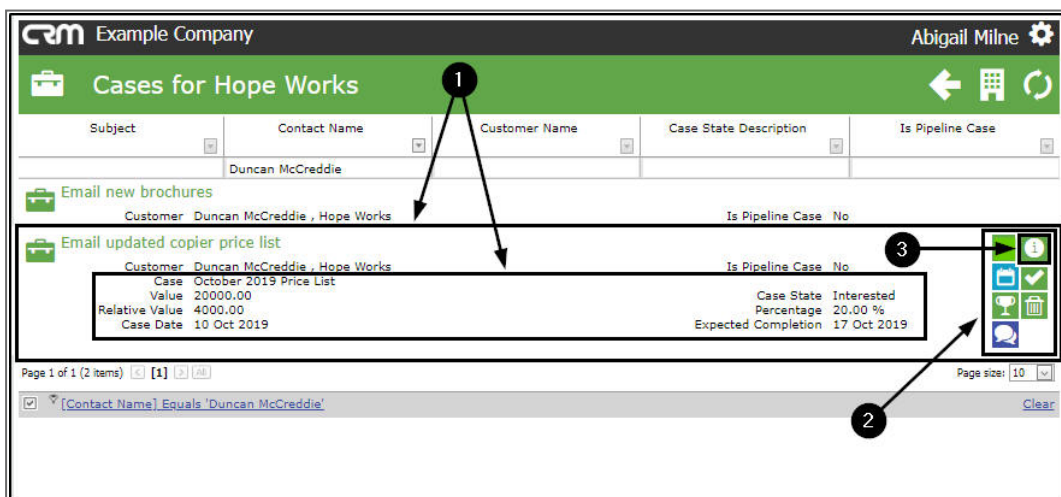


1. **Single click** on an open Case in this page to display the **summary** of the Case information and to reveal the
2. **Action Item** buttons:

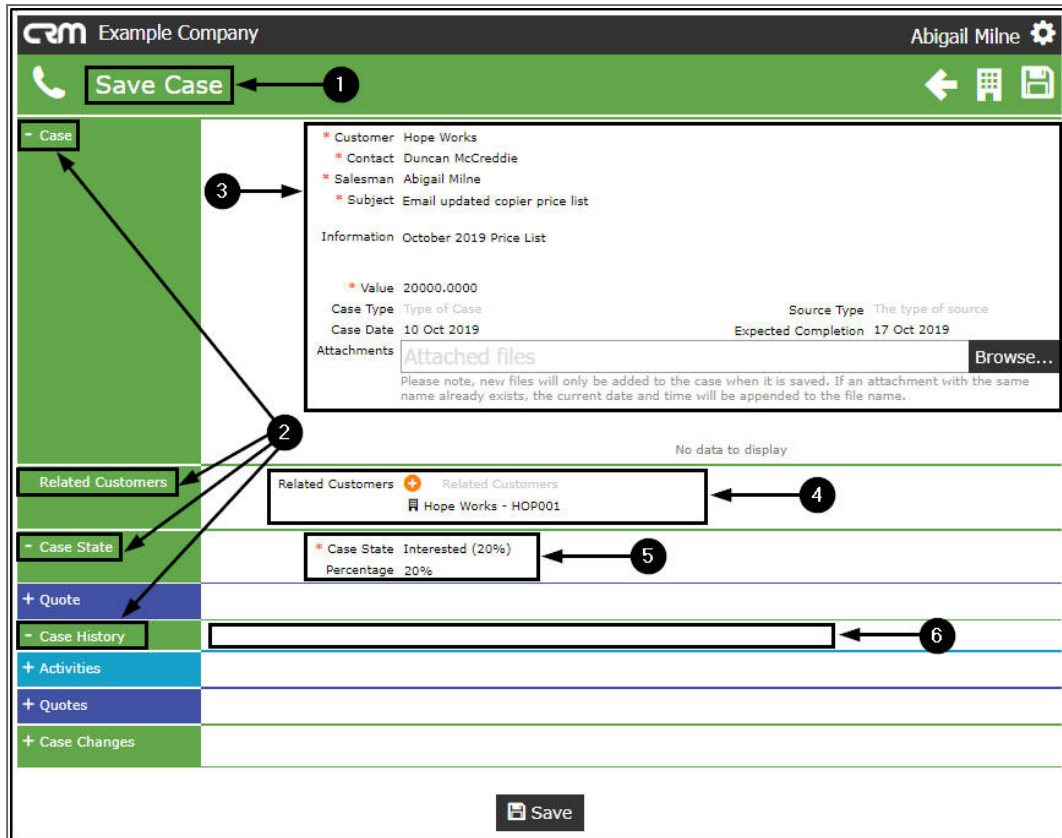
## CASES – ACTION BUTTONS

### VIEW CASE INFORMATION AND HISTORY

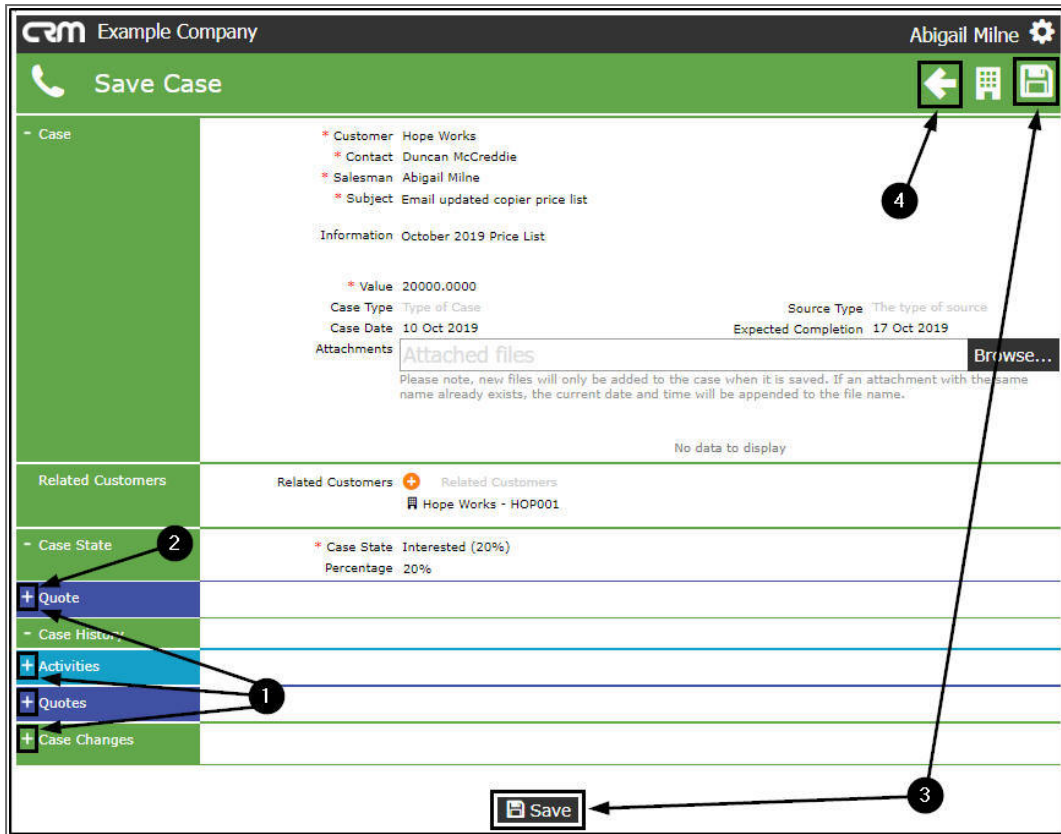
3. Click on the **View Case Info and History** icon.



1. The **Save Case** page will be displayed.
2. The following frames will be auto-expanded:
3. **Case**
  - You will note that the **case details** are auto populated. You can edit all these details, except for the Customer, Salesman, Subject and Information fields.
4. **Related Customers**
  - You will note that the Customer Name will be auto populated, you can **add more Related Customers**, if required.
5. **Case State**
  - The Case State and Percentage will be auto populated. You can **edit the Case State**, if required (which will update the Percentage).
6. **Case History**
  - Here you can view previous activities, quotes and changes on this case, if applicable.

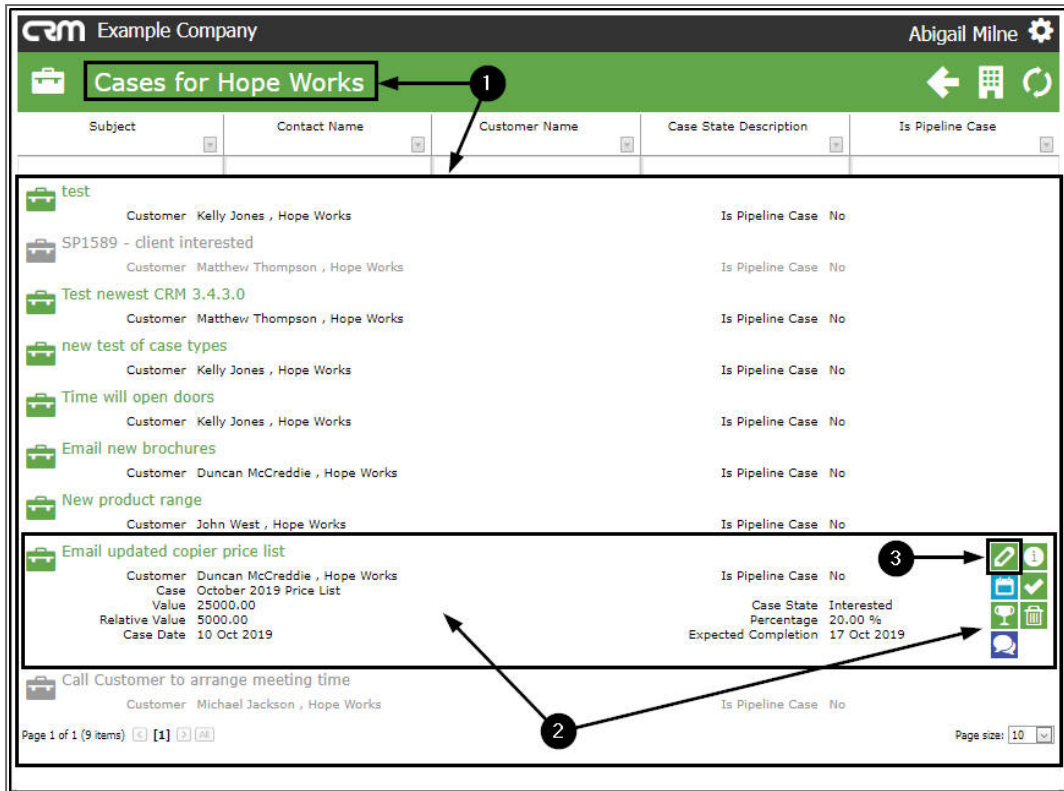


1. Click on the **expand** icon in any of the collapsed frames to **view** and/or **add** or **edit** the content, if required.
2. In this page, you can link a **Quote** to this Case. Refer to [Add a new Quote linked to this Case](#) for more information.
3. Click on **Save** to apply any changes.
4. Click on the **Back** button to return to the **My Cases** page.



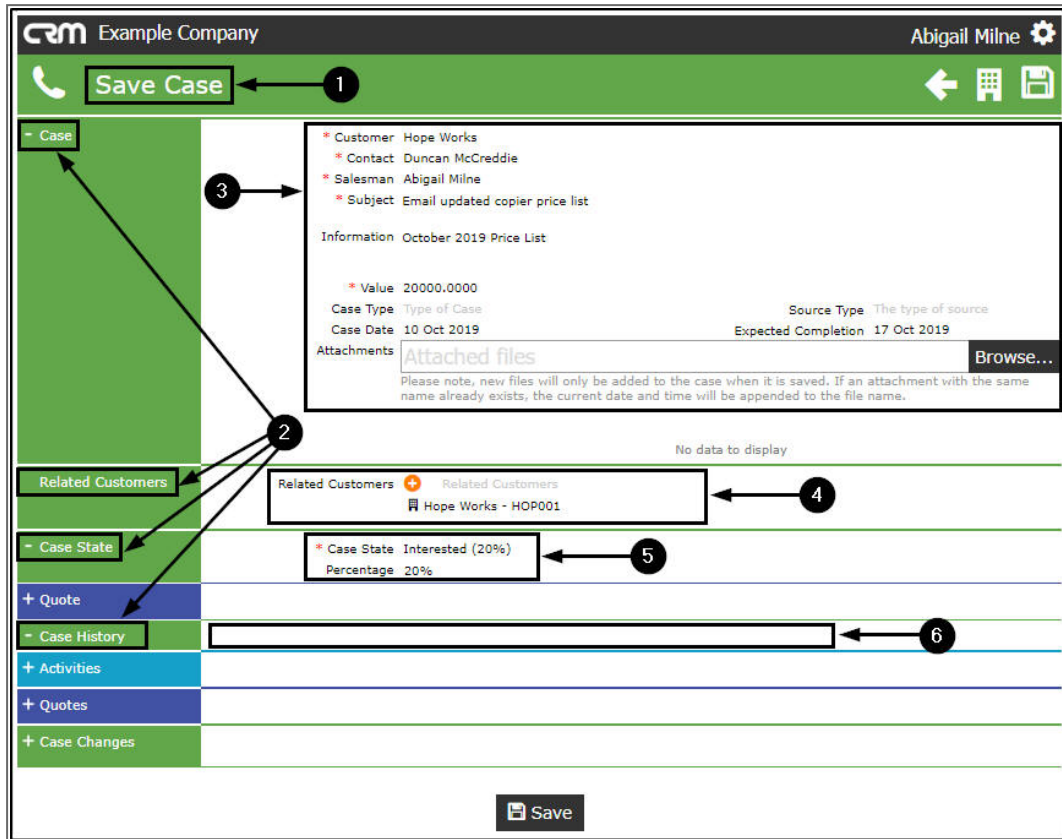
## VIEW / EDIT THIS CASE

1. After clicking on **Save** or **Back**, you will return to the **Cases for** [selected customer] page but the page will no longer be filtered, all the Cases linked to the selected customer will again be displayed.
2. Hover anywhere over an open Case to display the **Action Items** buttons.
3. Click on the **View/Edit this Case** icon.

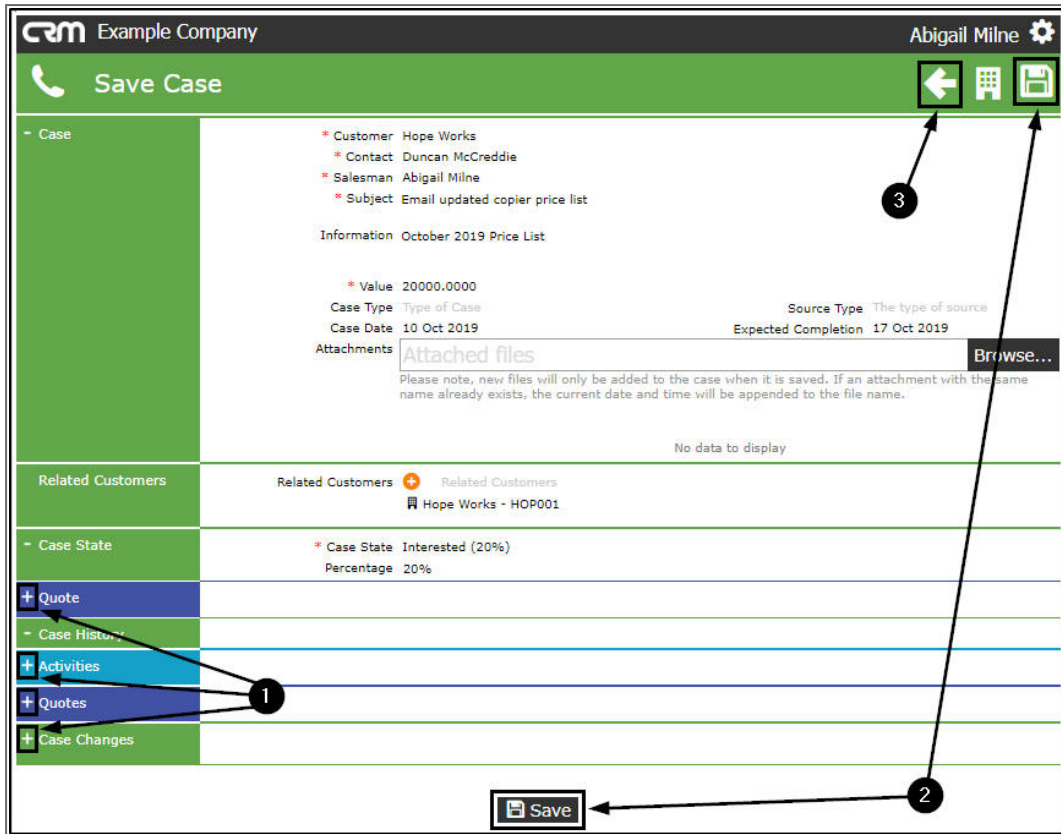


1. The **Save Case** page will be displayed.
2. The following frames will be auto-expanded:
3. **Case**
  - You will note that the **case details** are auto populated. You can edit all these details, except for the Customer, Salesman, Subject and Information fields.
4. **Related Customers**
  - You will note that the Customer Name will be auto populated, you can **add more Related Customers**, if required.
5. **Case State**
  - The Case State and Percentage will be auto populated. You can **edit the Case State**, if required (which will update the Percentage).
6. **Case History**

- Here you can view previous activities, quotes and changes on this case, if applicable.

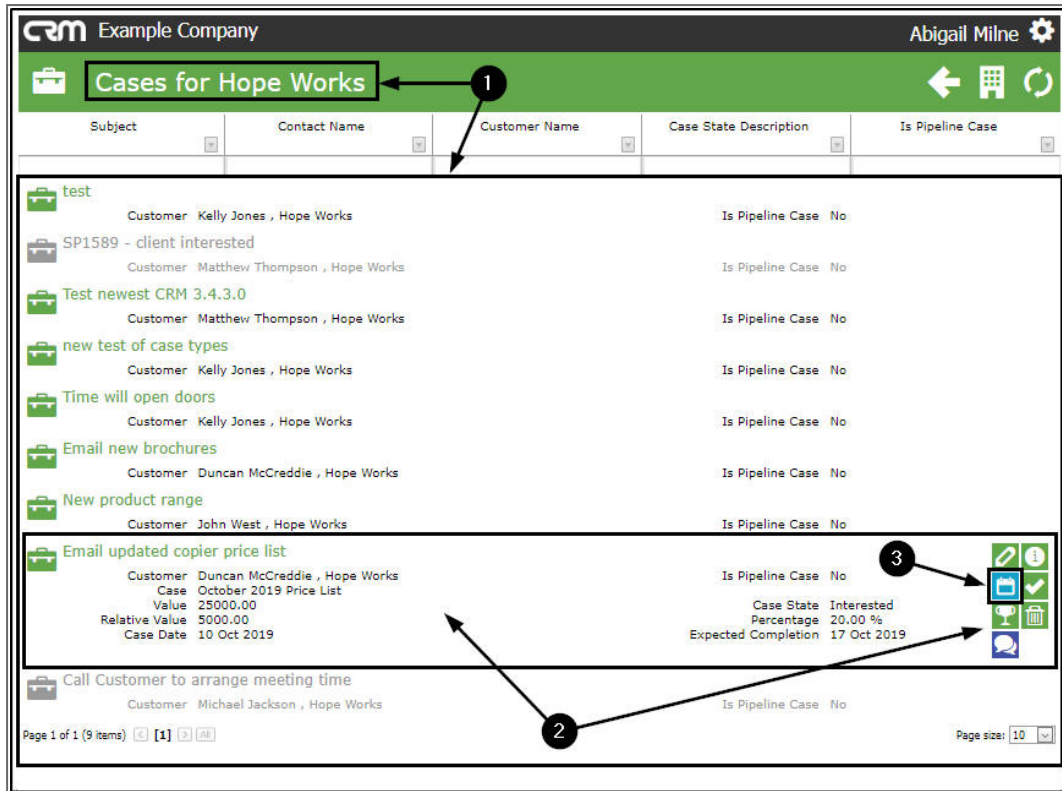


1. Click on the **expand** icon in any of the collapsed frames to **view** and/or **edit** the content, if required.
2. Click on **Save** to apply any changes or
3. Click on the **Back** button to return to the previous page.



## NEW ACTIVITY

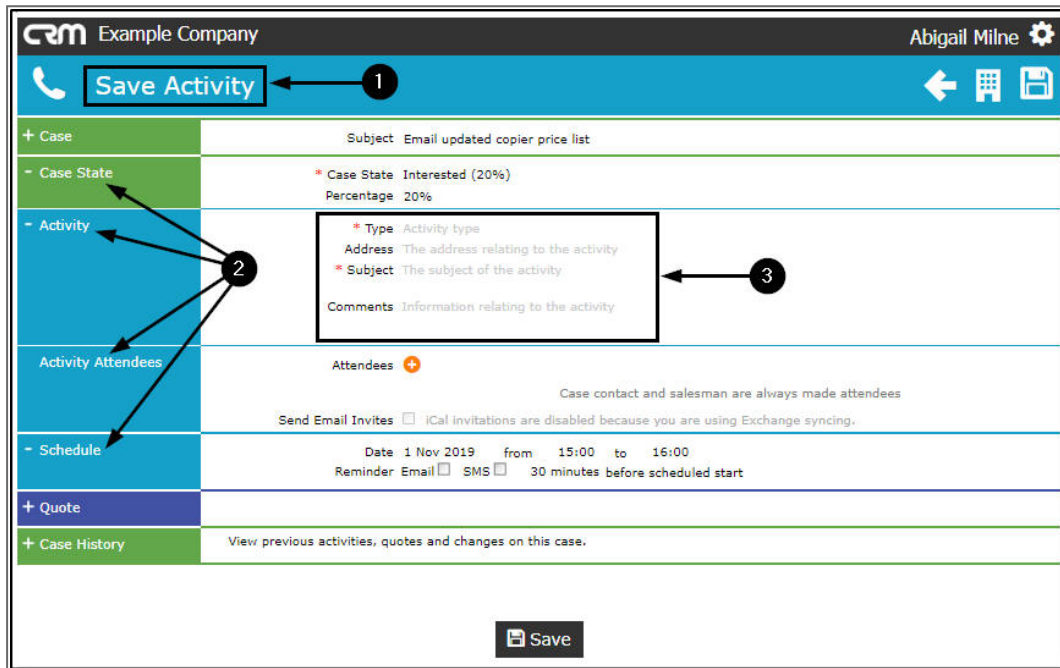
1. In the **Cases for [selected customer]** page,
2. Hover anywhere over an open Case to display the **Action Items** buttons.
3. Click on the **New Activity** icon.



1. The **Save Activity** page will be displayed.
2. The following frames will be auto-expanded:
  - **Case State**
  - **Activity**
  - **Activity Attendees** and
  - **Schedule**
3. Update the Activity Information:
  - **Type:**
    - Click in the **Type** field to display an **Activity Type** drop-down list.
    - Select from this list the applicable type (e.g. Phone call).
  - **Address:**
    - Click in the **Address** field, a list of all addresses linked to the customer will be displayed.



- Select the applicable address from this list.
- **Subject:**
  - Type in the **Subject** of this activity (e.g. Email new product product range catalogue).
- **Comments**
  - Type in a **Comment** relating to this activity (e.g. Customer looking to upgrade current machines).



1. You can select **Attendees** to link to the activity.
  - In this field you can select from **employees** and the **current customer contacts**.
2. You can select to **Send Email Invites** in order to have the system send an email invite for this activity, to all attendees.
3. Schedule the **Date and Time** for the activity.
4. Set a **Reminder** Email or SMS as and if required.

CRM Example Company
Abigail Milne

☎ Save Activity ← ☰ 📄

**+ Case** Subject: Email updated copier price list

**- Case State** \* Case State: Interested (20%)  
Percentage: 20%

**- Activity** \* Type: Email  
Address: The address relating to the activity  
\* Subject: Email new product brochure  
Comments: Customer looking to upgrade current machines.

**Activity Attendees** Attendees

Case contact and salesman are always made attendees

**2** → Send Email Invites  iCal invitations are disabled because you are using Exchange syncing.

**- Schedule** **3** → Date: 1 Nov 2019 from 15:00 to 16:00

Reminder: Email  SMS  30 minutes before scheduled start ← **4**

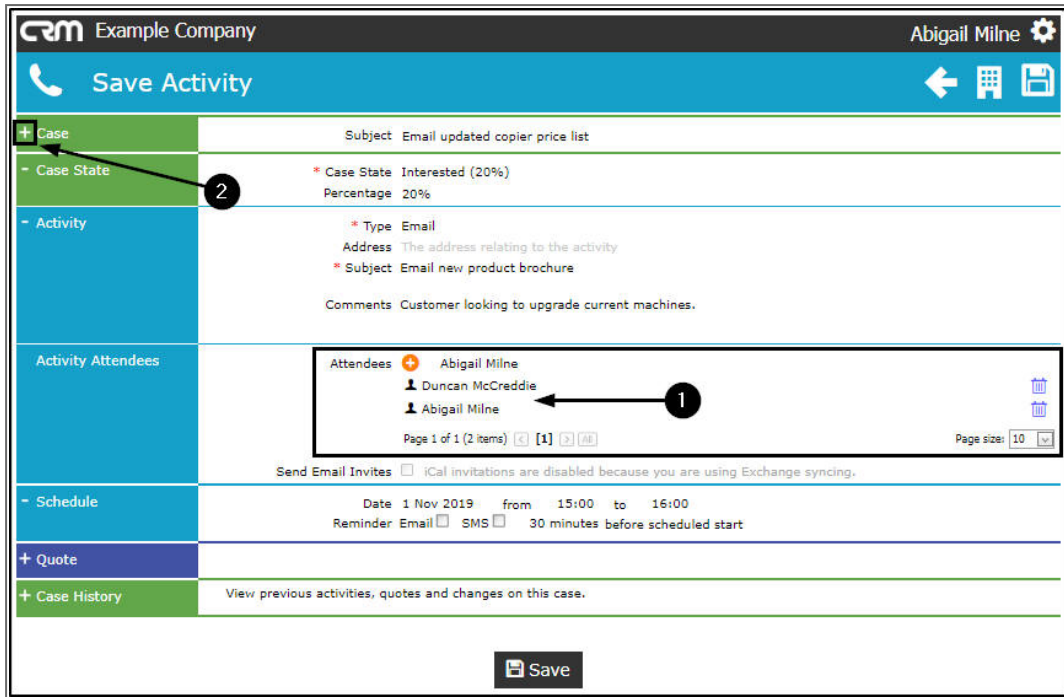
**+ Quote**

**+ Case History** View previous activities, quotes and changes on this case.

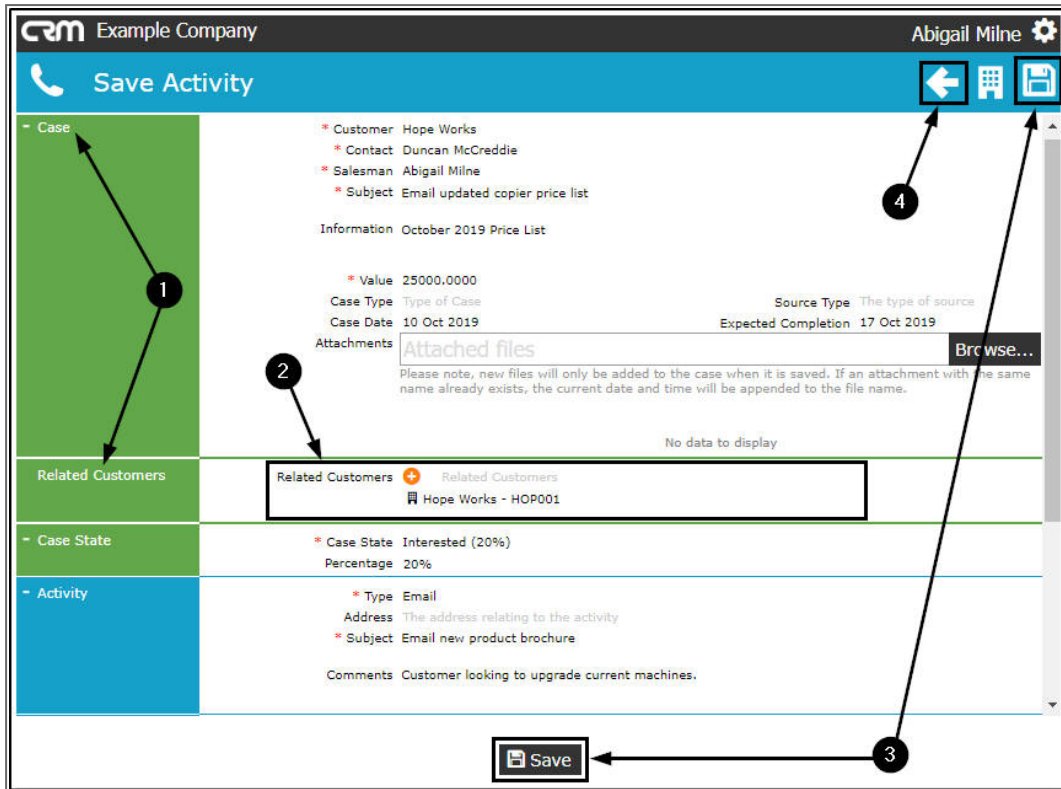
Save

## Add Related Customers

1. Once you have added Attendees, you may also wish to link **Related Customers** in order to invite contacts from various clients to an Activity - such as a meeting or training session. (these are not found in the Attendees list).
2. Click on the **expand** button in the **Case** frame.



1. The Case frame will be expanded to reveal the **Related Customers** frame.
2. Follow the process to **add the related customer(s)**, if required.
3. When you have finished adding the new activity details for this case, click on **Save** to return to the previous page .
4. If you do not wish to save any changes, click on the **Back** button to return to the previous page.



## CLOSE THIS CASE

1. In the **Cases for [selected customer]** page, hover anywhere over an open Case to display the **Action Items** buttons.
2. Click on the **Close this Case** icon.

Subject	Contact Name	Customer Name	Case State Description	Is Pipeline Case
test		Customer Kelly Jones , Hope Works		No
SP1589 - client interested		Customer Matthew Thompson , Hope Works		No
Test newestest CRM 3.4.3.0		Customer Matthew Thompson , Hope Works		No
new test of case types		Customer Kelly Jones , Hope Works		No
Time will open doors		Customer Kelly Jones , Hope Works		No
Email new brochures		Customer Duncan McCreddie , Hope Works		No
New product range		Customer John West , Hope Works		No
<b>Email updated copier price list</b>		Customer Duncan McCreddie , Hope Works		No
Call Customer to arrange meeting time		Customer Michael Jackson , Hope Works		No

1. The **Save Case** page will be displayed.
2. Type a completion note/explanation in the **Notes** field (e.g. Customer budget not yet approved for machine upgrade).

**Save Case**

Subject: Email updated copier price list

\* Case State: Interested (20%)  
Percentage: 20%

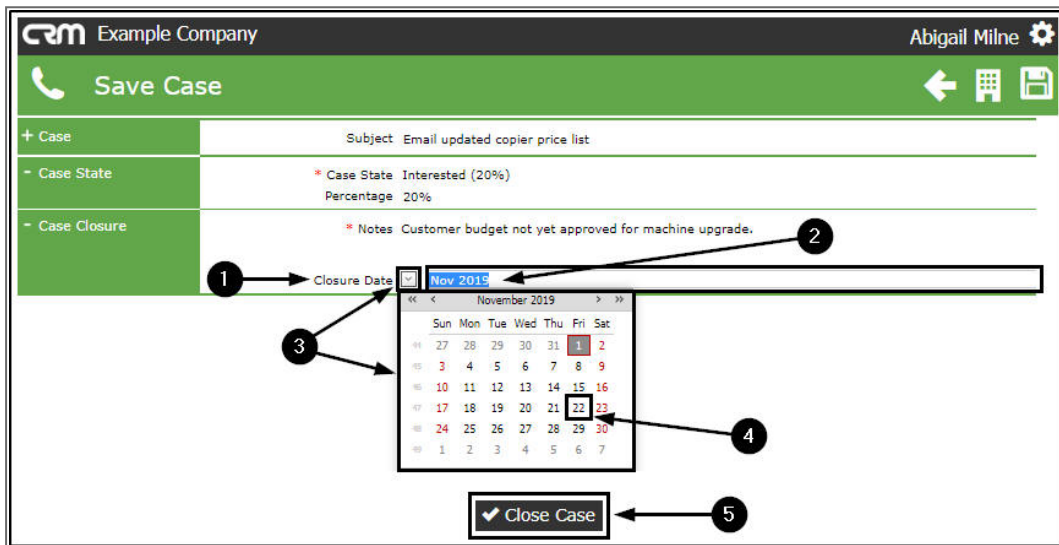
\* Notes:

Closure Date: 1 Nov 2019

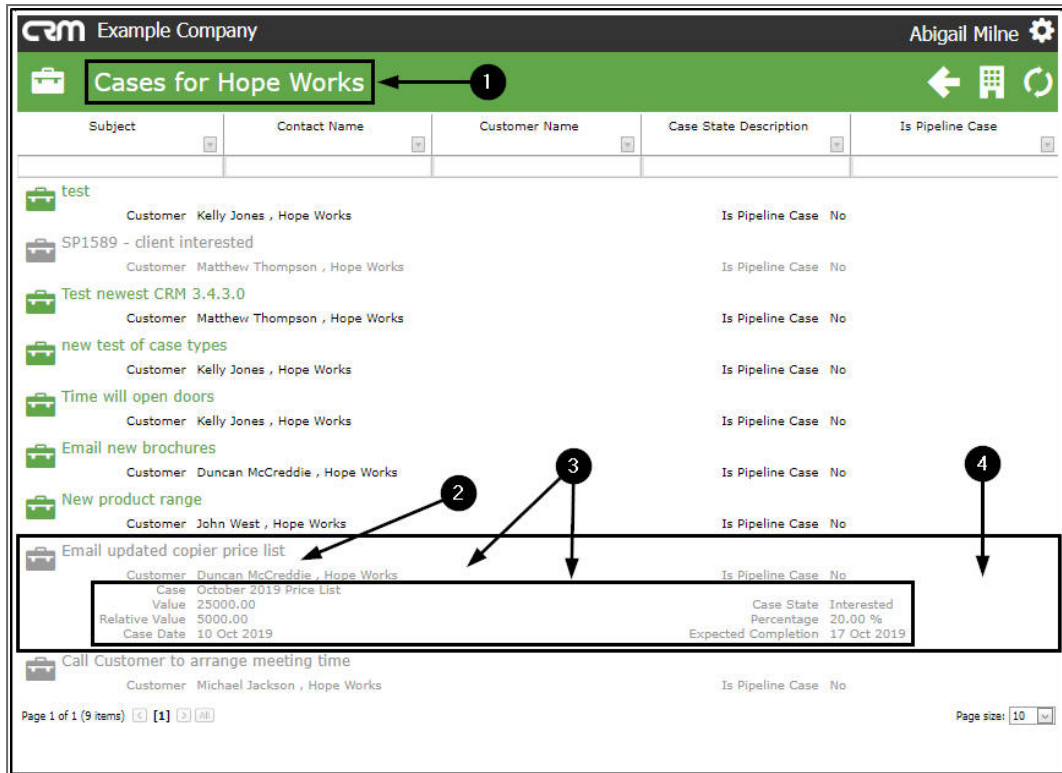
1. The **Closure Date** will auto populate with the current date.

If you wish to change this date,

2. Either, type the correct date directly in this field,
3. Or, click in this field to display a drop-down arrow, click on this arrow to bring up the calendar function.
4. Select the applicable alternative date.
5. Click on **Close Case**.



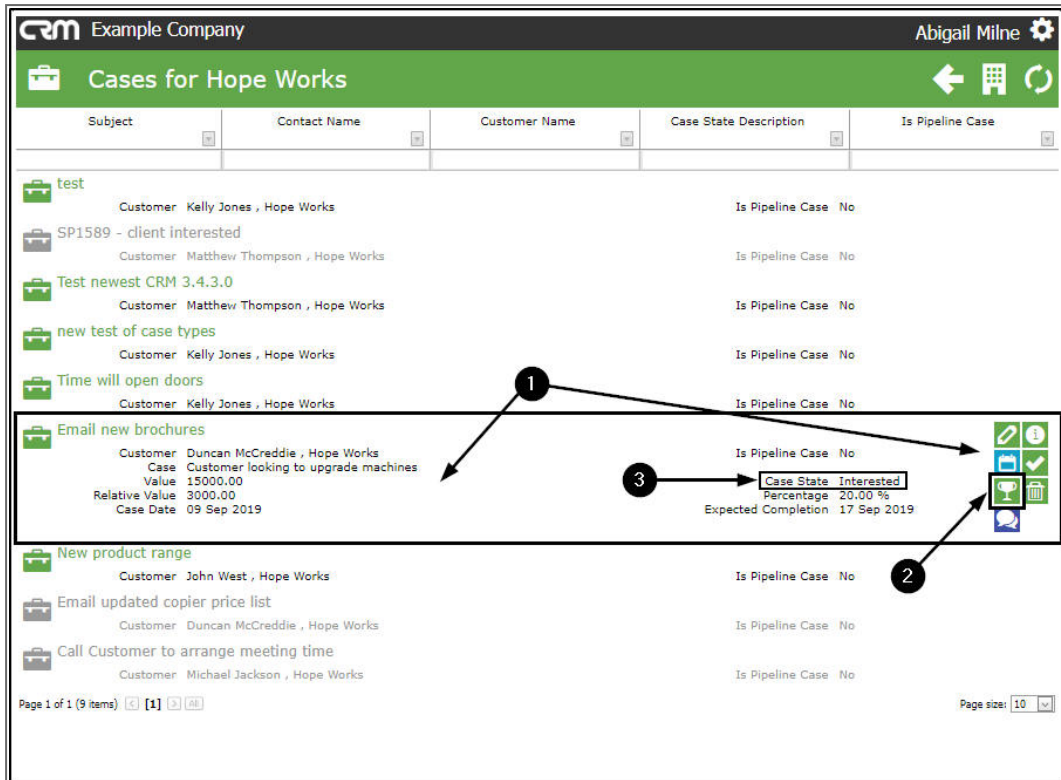
1. You will return to the **Cases for [selected customer]** listing page.
2. The recently closed Case will now be **greyed out** in this list.
3. You can single click on the closed Case to view the Case **Summary**.
4. You will note that the **Action Item buttons** are no longer available for this Case.



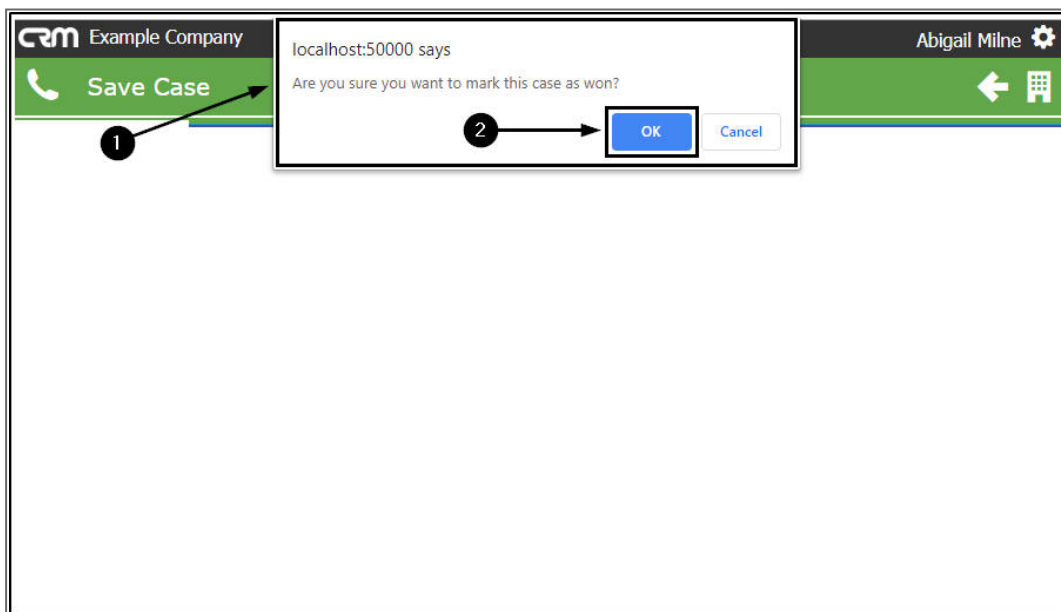
## WIN A CASE

1. In the **Cases for [selected customer]** page, hover anywhere over an open Case to display the **Action Items** buttons.
2. Click on the **Won this Case** icon.
3. Note that the **Case State** is currently **Interested**.

**Note:** A Case cannot be Won via Case Action Buttons - if this Case Type has Stage Gates Enabled. All Stage Gate Questions will need to be responded to, in order to 'Win the Case'.

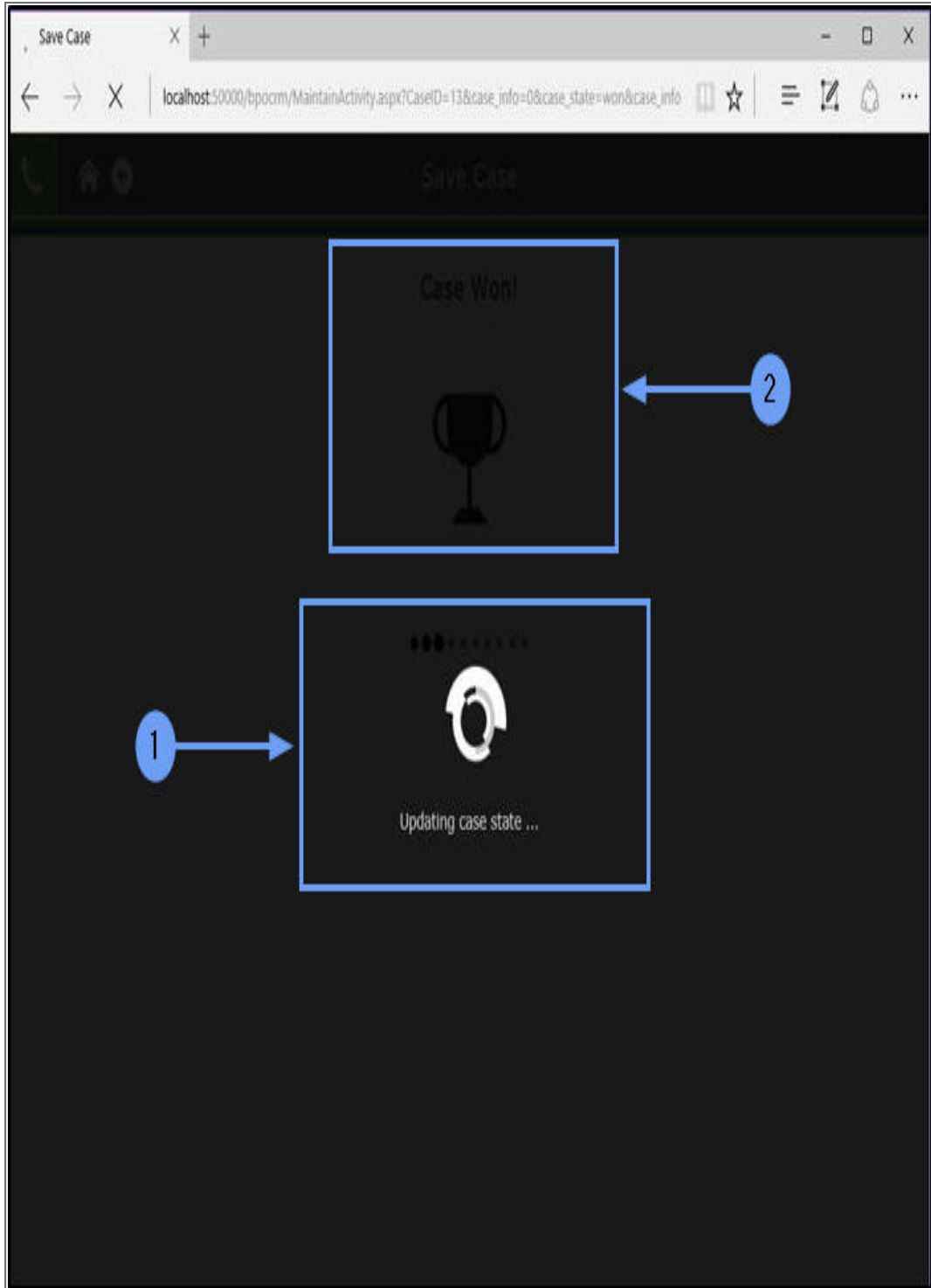


1. A message box will pop up asking:
  - Are you sure you want to mark this case as won?
2. Click on **OK**.

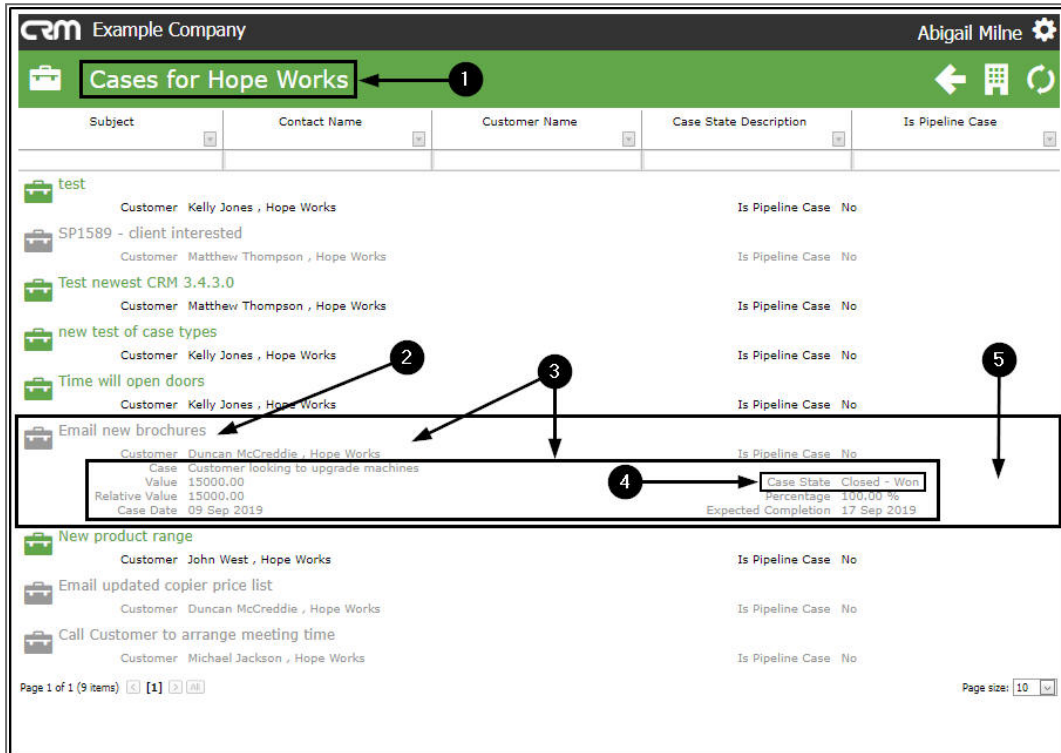




1. The system will update the Case State.
2. A **Case Won** message with a **Trophy** image will briefly flash on the screen.

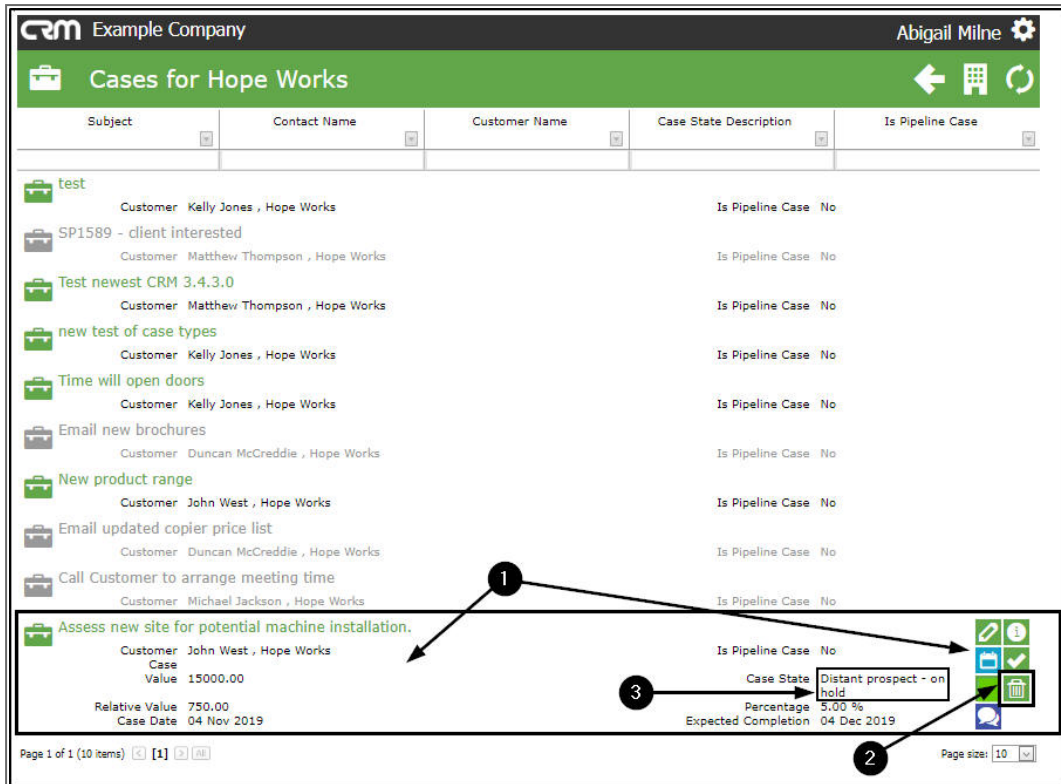


1. You will return to the **Cases for [selected customer]** listing page.
2. The recently won Case will now be **greyed out** in this list.
3. You can single click on the won Case to view the Case **Summary**.
4. The **Case State** has updated to **Closed - Won**.
5. You will note that the **Action Item buttons** are no longer available for this Case.

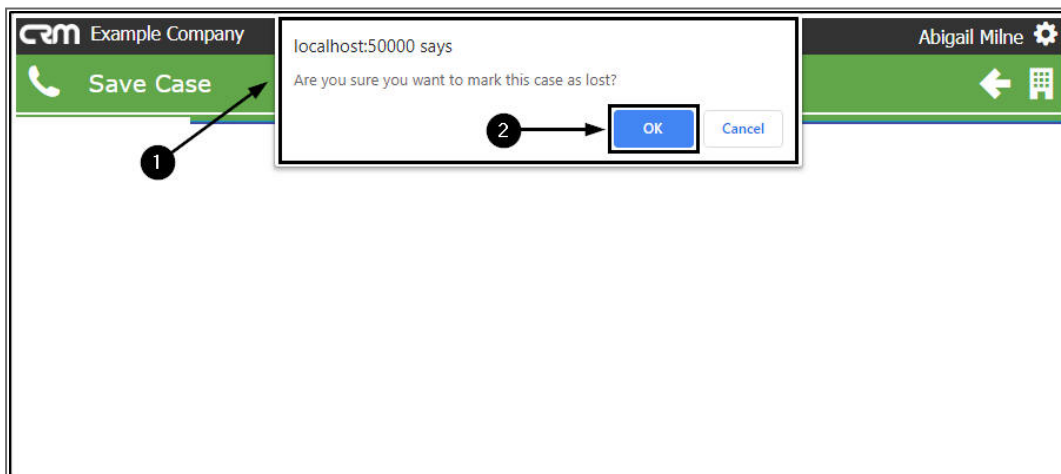


## LOST THIS CASE

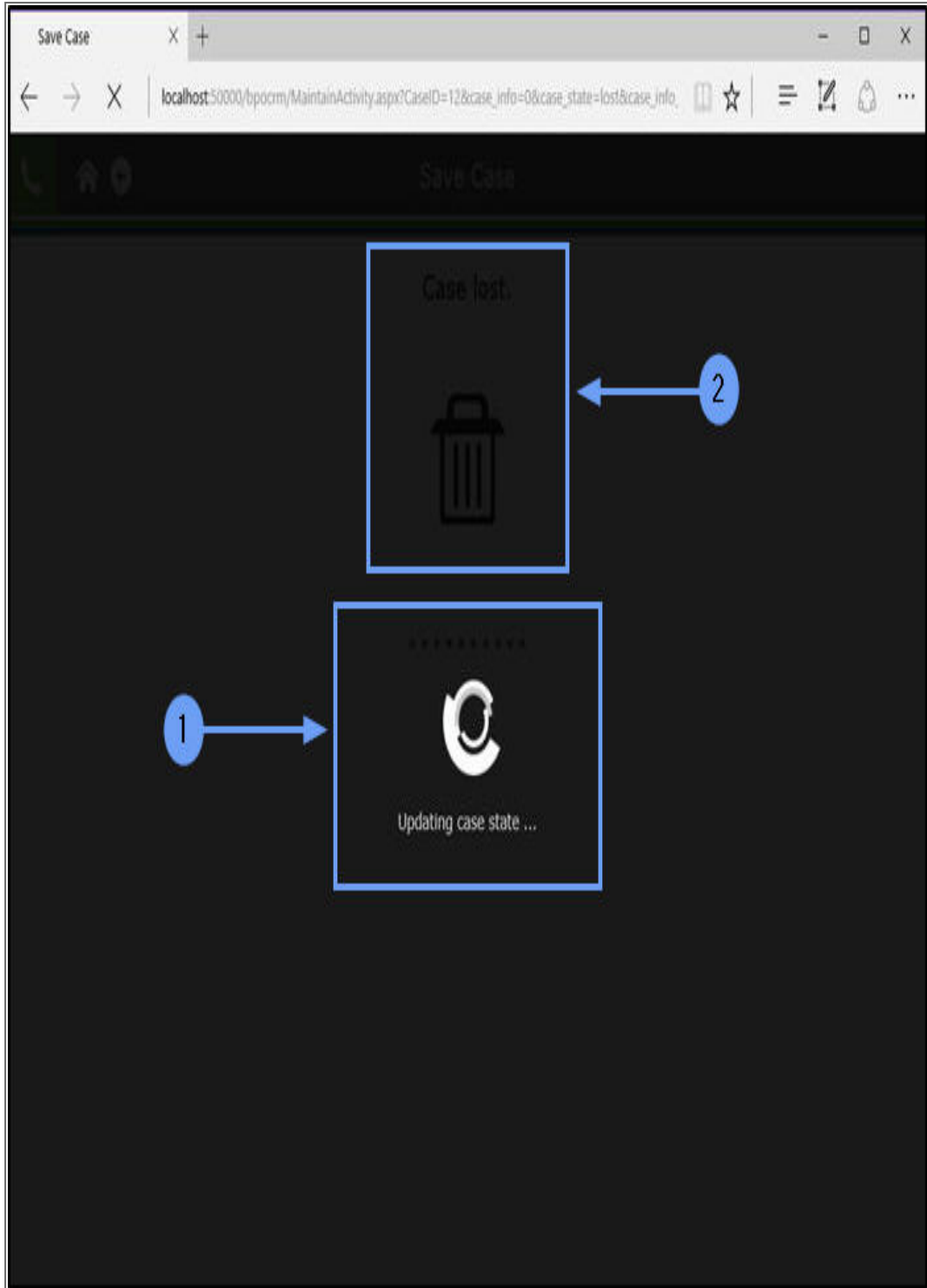
1. In the **Cases for [selected customer]** page, hover anywhere over an open Case to display the **Action Items** buttons.
2. Click on the **Lost this Case** icon.
3. Note that the current **Case State** is **Distant Prospect - on hold**.



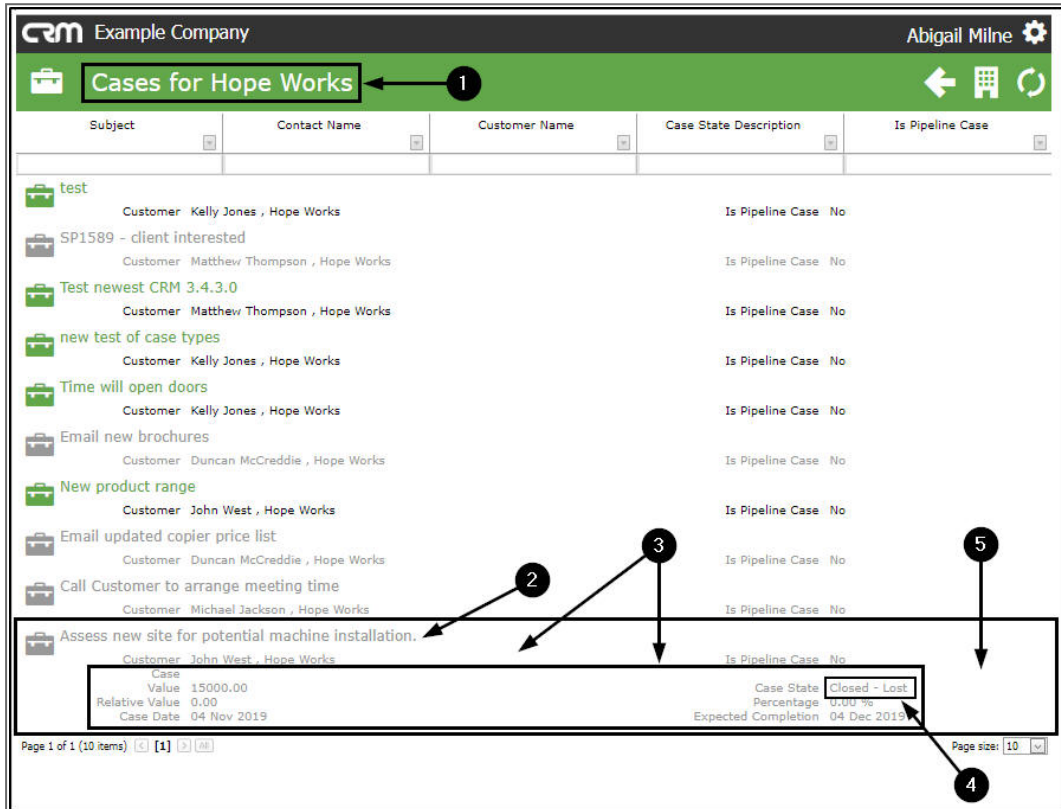
1. A message box will pop up asking:
  - Are you sure you want to mark this case as lost?
2. Click on **OK**.



1. The system will update the Case State.
2. A **Case Lost** message with a **Trash Bin** image will briefly flash on the screen.



1. You will return to the **Cases for [selected customer]** listing page.
2. The recently lost Case will now be **greyed out** in this list.
3. You can single click on the lost Case to view the Case **Summary**.
4. The **Case State** has updated to **Closed - Lost**.
5. You will note that the **Action Item buttons** are no longer available for this Case.



## ADD A NEW QUOTE LINKED TO A CASE

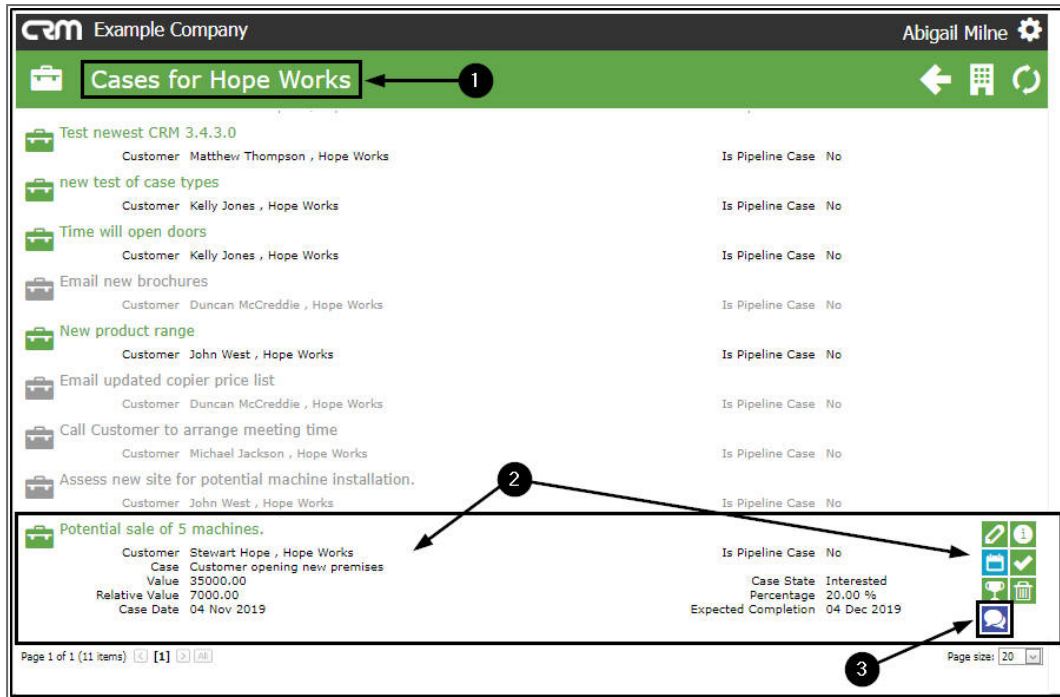
- From the **Cases for [selected customer]** page page, you can link a Quote by navigating via the following **Action** buttons:
  - **View Case Info and History**
    - The **Save Case** page will open, expand the **Quote** frame.

- **View/Edit this Case**
  - The **Save Case** page will open, expand the **Quote** frame.
- **New Activity**
  - The **Save Activity** page will open, expand the **Quote** frame.
- **New Quote**
  - The **Save Quote** page will open, the Quote, Quote Financials and Quote Items frames will be expanded, ready for you to add the new Quote details.

For the purpose of this manual we will navigate from the **Save Quote** page page but the **link quote process** is the same from either page.

1. In the **Cases for [selected customer]** listing page.
2. Hover anywhere over an open Case to display the **Action Items** tiles.
3. Click on the **New Quote** tile.





1. The **Save Quote** page will open.

## LINK QUOTE PROCESS

2. The **Subject** in the Case frame will be auto populated with the information of the Case selected in the previous step.
3. **Expand** the Case frame if you wish to view the full Case information in this page.
4. The following frames will be auto-expanded :
  - **Quote**
  - **Quote Financials** and
  - **Quote Items**

**Note:** If you are linking a Quote from the **Save Case** or **Save Activity** pages then you will need to expand these frames manually.



1. Note the message at the top of the Quote frame: **A quote will only be created if you add quote line items.** This will be covered in the **Add Quote Items** section of this manual.
2. **Customer:** This will populate with the name of the Customer linked to the Case.  
**Quote Contact:** This will populate with the contact selected in the Case section.
  - You can click on the drop-down arrow and select an alternative contact from the drop-down list, if required.
3. **Quote Reference:** The system will allocate a reference number as the quote is saved.  
**Reference:** Type in a reference for this quote.  
**Comments:** Type in a comment/additional information relating to this quote.

1. **Date:** This will populate with the current date.

You can either type directly in this field to change the date, or click on the drop-down arrow and use the calendar function to select an alternative date if required.

**Site:** This will auto-populate with the site set up on this customer.

If the customer is linked to more than one site then click on the drop-down arrow and select the correct site for this quote.

**Print Layout:** This will auto populate with the Sales Quote print layout set up on the Customer.

## QUOTE FINANCIALS

2. **Currency:** This will auto populate with the currency set up on the customer. You can click on the drop-down arrow and select an alternative currency, if required.

**Tax Rate:** This will auto populate with the tax rate set up on the customer.

**Exchange Rate:** This will auto populate with the exchange rate set up on the customer.

**Quote Terms:** This is the quote repayment factor and should be configured in **Static Data: Sales Quote Terms or Repayment Method** This will auto populate with Full Payment COD.

- You can click on the drop-down arrow and select an alternative payment period, if required.

**Commercial:** This will auto populate with the **commercial** set up on the customer.

- Click in this field to reveal a drop-down arrow and select from the list an alternative commercial, if required.

The screenshot shows the 'Save Quote' form in a CRM system. The form is divided into several sections:

- Case:** Subject: Potential sale of 5 machines.
- Quote:**
  - \* A quote will only be created if you add quote line items.
  - \* Customer: Hope Works
  - \* Quote Contact: Stewart Hope
  - Quote Reference: REF00000
  - Reference: HWQ202
  - Comments: Customer requires on-site evaluation.
- Quote Financials:**
  - \* Currency: South African Rand
  - Tax Rate: 15.00
  - \* Exchange Rate: 1.0000
  - Quote Terms: Full Payment COD
  - Commercial: Default
- Quote Items:**
  - Add item (+) Type to find items...
  - Add template (+) Add sales template items
  - Drag a column here...
  - No data to display

Annotations in the image include:

- Arrow 1 pointing to the 'Date' field (4 Nov 2019).
- Arrow 2 pointing to the 'Comments' field.

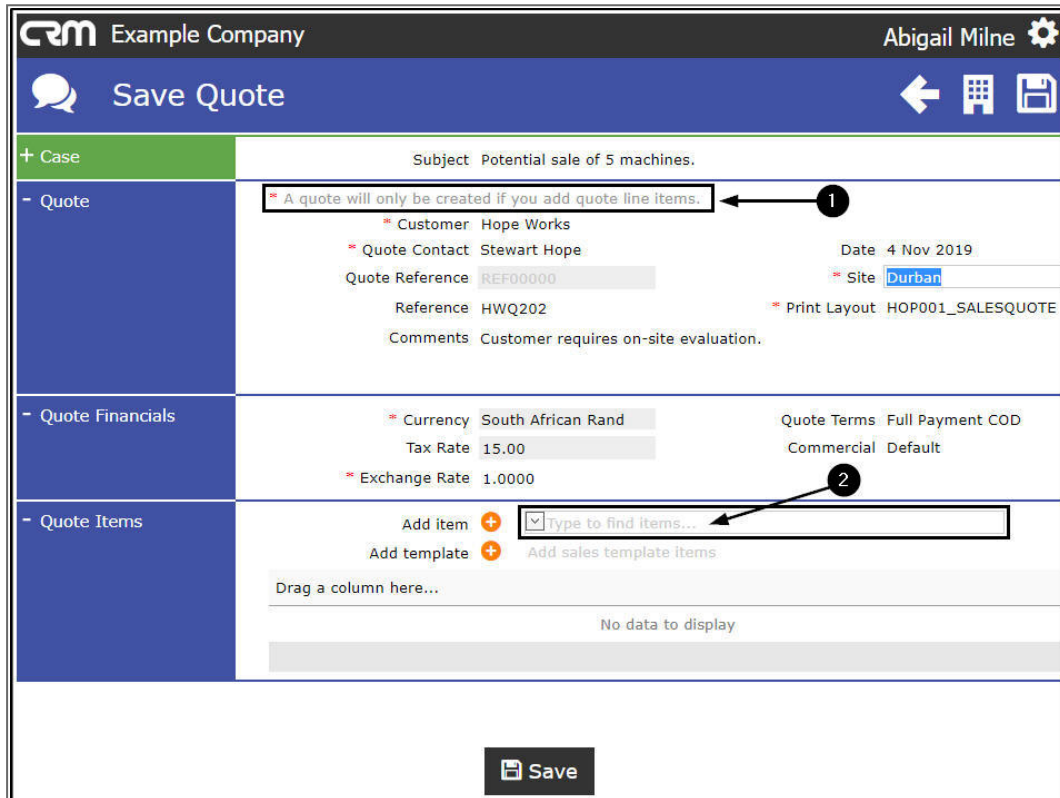
At the bottom of the form is a 'Save' button.

## ADD QUOTE ITEMS

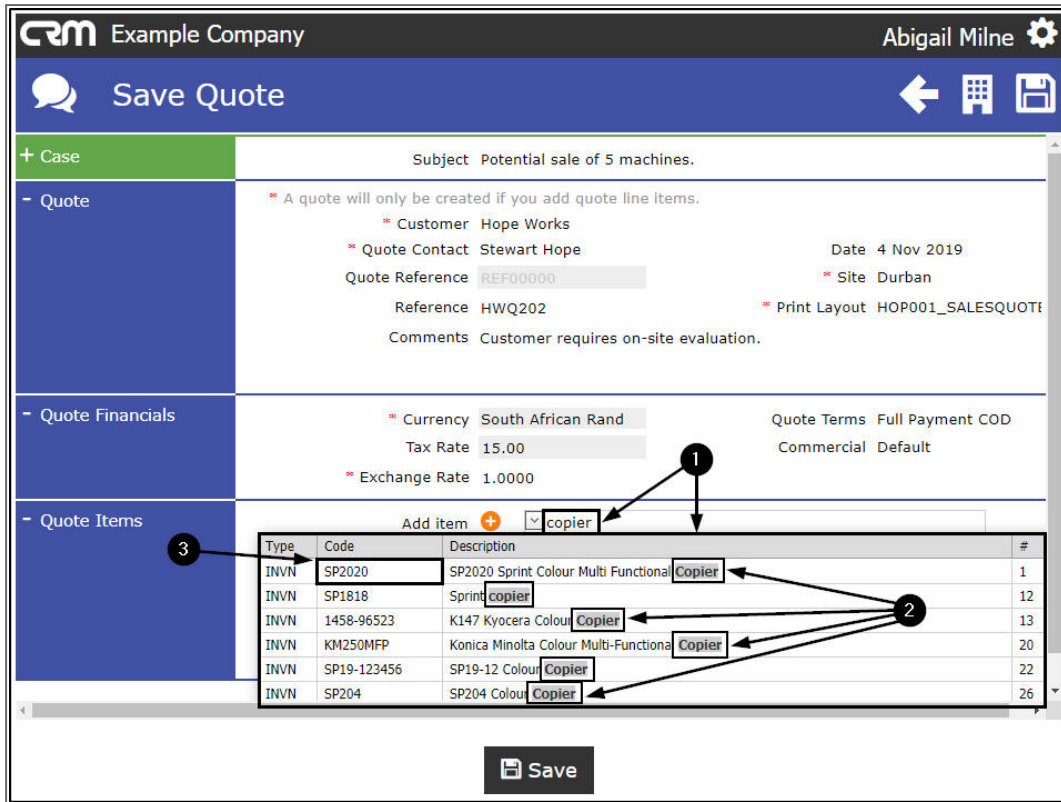
You now have the ability to add single items to a quote.

**Note:** For Part Numbers to pull through to this list - you need to ensure that the **Quote Products are specified**.

1. Take note of the message at the top of the Quote section: you must add at least one item to this quote for it to be created. This process is set out below.
2. In the **Add item** field, start typing the **code** or **description** of the item you wish to link to this quote.



1. As you start typing in the field, a **Type, Code** and **Description** list of all items on the system, will be displayed.
2. The system will **filter** for the item that you are searching for.
3. Select the applicable **item** from this list.



1. The selected item code and description will populate the **Add** item field.
2. Click on the **plus[+]** button.

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main title is 'Save Quote'. The interface is divided into three main sections:

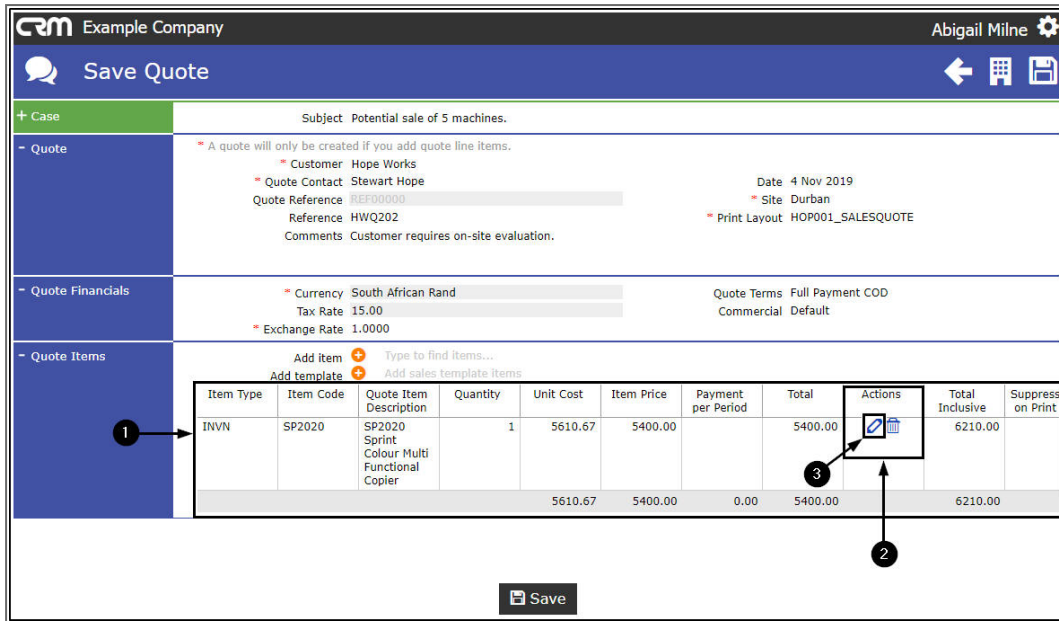
- Quote:** Contains fields for Customer (Hope Works), Quote Contact (Stewart Hope), Date (4 Nov 2019), Quote Reference (REF00000), Site (Durban), Reference (HWQ202), and Print Layout (HOP001\_SALESQUOTE). A note states: 'A quote will only be created if you add quote line items.' A comment reads: 'Customer requires on-site evaluation.'
- Quote Financials:** Contains Currency (South African Rand), Tax Rate (15.00), Exchange Rate (1.0000), Quote Terms (Full Payment COD), and Commercial (Default).
- Quote Items:** Features an 'Add item' button (marked with a circled '2') and an 'Add template' button. A dropdown menu is open, showing a selected item: 'INVN | SP2020 | SP2020 Sprint Colour Multi Functional Copi'. Below the dropdown is a table header 'Drag a column here...' and the text 'No data to display'. A circled '1' points to the dropdown menu.

A 'Save' button is located at the bottom center of the interface.

1. The item will be added to the **Quote Items** frame.
2. You will note that there are **2** action buttons linked to this item.
  - An **Edit** button. This will enable you to edit the item details e.g. quantity, price, if required.
  - A **Delete** button. This will enable you to delete the item from the quote, if required.

## EDIT QUOTE ITEM

3. Click on the **Edit** button.



1. An **edit item** frame will be displayed.

Here you can make changes to the following details:

2. **Item Description**
3. **Item Quantity**
4. **Item Unit Cost**
5. **Item Price**
6. **Suppress on Print** Select this check box if you do not want this line item visible on the printed quote. This will not affect the Sub/Grand Total
7. Click on the **Apply Changes** icon [ ] to save your changes or the the **Cancel changes** icon [x] to cancel the changes, as required.



The screenshot shows the 'Save Quote' interface for 'Example Company'. The quote is for 'Hope Works' with a date of 4 Nov 2019 and site 'Durban'. The quote reference is 'REF00000' and the reference is 'HWQ202'. The quote includes one item: 'SP2020 Sprint Colour Multi Functional Copier' with a quantity of 1, unit cost of 5610.67, and item price of 5400.00. The total is 5400.00 and the total inclusive is 6210.00. A detailed view of the first item is shown below the table, with fields for 'Quote Item Description', 'Quantity', 'Unit Cost', and 'Item Price'. The quantity is currently 1, and the item price is 5400.0000. A 'Save' button is visible at the bottom.

1. In this example, the **Quantity** has been updated to **2**.
2. The **Total** and **Total Inclusive** columns will update accordingly.

## LINK ADDITIONAL QUOTE ITEMS

3. In the **Add item** field, start typing the **code** or **description** of the next item that you wish to add to the quote.

**CRM Example Company** | Abigail Milne

**Save Quote**

**Case:** Subject: Potential sale of 5 machines.

**Quote:** \* A quote will only be created if you add quote line items.  
 \* Customer: Hope Works  
 \* Quote Contact: Stewart Hope  
 Quote Reference: RRF00000  
 Reference: HWQ202  
 Comments: Customer requires on-site evaluation.  
 Date: 4 Nov 2019  
 \* Site: Durban  
 \* Print Layout: HOP001\_SALESQUOTE

**Quote Financials:**  
 \* Currency: South African Rand  
 Tax Rate: 15.00  
 \* Exchange Rate: 1.0000  
 Quote Terms: Full Payment COD  
 Commercial: Default

**Quote Items:**

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	2	5610.67	5400.00		10800.00		12420.00	
							10800.00		12420.00	

**Save**

1. As you start typing in the field, the **Type, Code** and **Description** list will again be displayed.
2. The system will filter for the item that you are searching for.
3. Select the applicable item from this list.

**CRM Example Company** | Abigail Milne

**Save Quote**

**Case:** Subject: Potential sale of 5 machines.

**Quote:** \* A quote will only be created if you add quote line items.  
 \* Customer: Hope Works  
 \* Quote Contact: Stewart Hope  
 Quote Reference: RRF00000  
 Reference: HWQ202  
 Comments: Customer requires on-site evaluation.  
 Date: 4 Nov 2019  
 \* Site: Durban  
 \* Print Layout: HOP001\_SALESQUOTE

**Quote Financials:**  
 \* Currency: South African Rand  
 Tax Rate: 15.00  
 \* Exchange Rate: 1.0000  
 Quote Terms: Full Payment COD  
 Commercial: Default

**Quote Items:**

Type	Code	Description	Q	U	P	T	A	T
INVN	2020-147K	Black toner SP2020	2					
INVN	SP19-147K	Black Toner SP1919	4					
INVN	147-888544	K147 Black toner	14					
INVN	12-098765	SP19-12 Black Toner	23					
INVN	204-147K	SP204 Black Toner	27					
INVN	147258	Black Toner	31					
INVN	540-147K	Compatible black toner	55					

**Save**

1. The additional item code and description will populate the **Add** item field.
2. Click on the **plus [+]** button.

CRM Example Company Abigail Milne

**Save Quote**

**+ Case** Subject: Potential sale of 5 machines.

**- Quote**

\* A quote will only be created if you add quote line items.

\* Customer: Hope Works  
 \* Quote Contact: Stewart Hope  
 Quote Reference: REF00000  
 Reference: HWQ202  
 Comments: Customer requires on-site evaluation.

Date: 4 Nov 2019  
 \* Site: Durban  
 \* Print Layout: HOP001\_SALESQUOTE

**- Quote Financials**

\* Currency: South African Rand  
 Tax Rate: 15.00  
 \* Exchange Rate: 1.0000

Quote Terms: Full Payment COD  
 Commercial: Default

**- Quote Items**

Add Item **+** **INVN | 2020-147K | Black toner SP2020** **+**

Add template **+**

Add sales template items

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	2	5610.67	5400.00		10800.00		12420.00	
				5610.67	5400.00	0.00	10800.00		12420.00	

**Save**

1. The additional item will be added to the **Quote Items** frame.
2. Edit the details, if required.
3. The quote **Total Inclusive** amount will update to include this item.

## SAVE QUOTE

4. When you have finished adding items to the Quote sections, click on **Save**.

CRM Example Company | Abigail Milne

**Save Quote**

**Case** Subject: Potential sale of 5 machines.

**Quote** \* A quote will only be created if you add quote line items.  
 \* Customer: Hope Works  
 \* Quote Contact: Stewart Hope  
 Quote Reference: REF00000  
 Reference: HWQ202  
 Comments: Customer requires on-site evaluation.  
 Date: 4 Nov 2019  
 \* Site: Durban  
 \* Print Layout: HOP001\_SALESQUOTE

**Quote Financials**  
 \* Currency: South African Rand  
 Tax Rate: 15.00  
 \* Exchange Rate: 1.0000  
 Quote Terms: Full Payment COD  
 Commercial: Default

**Quote Items**

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	2	5610.67	5400.00		10800.00		12420.00	
INVN	2020-147K	Black toner SP2020	1	481.70	526.63	526.63	526.63		605.62	
				6092.37	5926.63	526.63	11326.63		13025.62	

**Save**

1. A message box will appear at the top of the page informing you that:
  - **Quote saved successfully**
2. The system will have allocated a Quote Reference Number.

There are now 4 processing options available in this page:

3. [Delete](#)
  4. [View](#)
  5. [Save](#)
  6. [Copy](#)
7. For the purpose of this manual, we have selected the Customers icon to return to the **Customer Dashboard** (Customer Home page).

Quote saved successfully.

**Save Quote**

Subject: Potential sale of 5 machines.

Quote Details:

- Customer: Hope Works
- Quote Contact: Stewart Hope
- Quote Reference: QT0000216
- Reference: HWQ202
- Comments: Customer requires on-site evaluation.
- Date: 4 Nov 2019
- Site: Durban
- Print Layout: HOP001\_SALESQUOTE

Quote Financials:

- Currency: South African Rand
- Tax Rate: 15.00000
- Exchange Rate: 1.0000
- Quote Terms: Full Payment COD
- Commercial: Default

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	2.00	5610.67	5400.00	5400.00	10800.00		12420.00	
INVN	2020-147K	Black toner SP2020	1.00	481.70	526.63	526.63	526.63		605.62	
			3.00	6092.37	5926.63	5926.63	11326.63		13025.62	

Buttons: Delete, View, Save, Copy

## View New Quote from the Customer Dashboard

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

The screenshot shows a CRM dashboard for 'Example Company' with the user 'Abigail Milne'. The main navigation bar includes a 'Hope Works' menu item (marked with a '1') and a search bar. The dashboard is divided into several sections:

- Activities for Last 30 Days:** A table with columns for Description, Target, Existing Custmrs, and New Custmrs.
 

Description	Target	Existing Custmrs	New Custmrs
Phone call	20	3	2
Email	30	3	1
Meeting	20	0	2
On Site inspection	20	1	0
Site inspection	2	0	0
- 1 Month Performance:** A bar chart showing values for Cases, Invoices, Orders, and Quotes. The Y-axis ranges from 0.00 to 50,000.00.
- 4 Month Pipeline:** A bar chart showing values for Nov 2019, Dec 2019, Jan 2020, and Feb 2020. The Y-axis ranges from 0.00 to 6,000.00.
- Hope Works - HOP001:** A detailed view of a customer profile, including a company logo, trading name, registered name, VAT number, registration number, rank, website, and phone number. A '91%' completion indicator is shown.
- 12 Months Sales History:** A bar chart showing Contract Income (yellow) and Sales Revenue (blue) from January 2018 to January 2019. The Y-axis ranges from 0 to -400.

At the bottom of the dashboard, there is a grid of icons for various functions: create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files. A '2' is placed over the 'credit notes' icon.

1. The **Quotes** for [selected customer] page will open.
2. The quote that you linked to the Case, can still be viewed in this listing page.
3. Use the **Page Reference field** or the **Filter Row** to search for the quote if it not listed on the first open page.

Either

4. Click on **Back**

Or

5. Click on the **Customer icon**

to return to the **Customer Dashboard** (Customer Home page).

CRM Example Company Abigail Milne

**Quotes for Hope Works** ← 4 →

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000202	HOP001	Hope Works	toner	600.36	ZAR	17 Nov 2017	Order generated	Yes
QT0000203	HOP001	Hope Works	test	14073.30	ZAR	18 Dec 2017	Order generated	Yes
QT0000204	HOP001	Hope Works	1234	20932.74	ZAR	29 Jan 2018	Order generated	Yes
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	New quote	Yes
QT0000210	HOP001	Hope Works	HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000214	HOP001	Hope Works	HWQ202	18630.00	ZAR	24 Oct 2019	New quote	No
QT0000217	HOP001	Hope Works	HWQ202	13025.62	ZAR	04 Nov 2019	New quote	No

Page 10 of 10 (99 items) Page size: 10

## View the linked Quote via the Cases tile

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

**CRM Example Company** Abigail Milne

**Hope Works** Search

**Activities for Last 30 Days**

Description	Target	Existing Custmrs	New Custmrs
Phone call	20	3	2
Email	30	3	1
Meeting	20	0	2
On Site inspection	20	1	0
Site inspection	2	0	0

**1 Month Performance**

**4 Month Pipeline**

**Hope Works - HOP001**

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

**12 Months Sales History**

Legend: Contract Income (Yellow), Sales Revenue (Blue)

1. The **Cases** for [selected customer] listing page will open.
2. **Hover over** the Case to display the **Action buttons**.
3. Click on either the **View/Edit this Case** icon or the **View Case Info and History** icon.



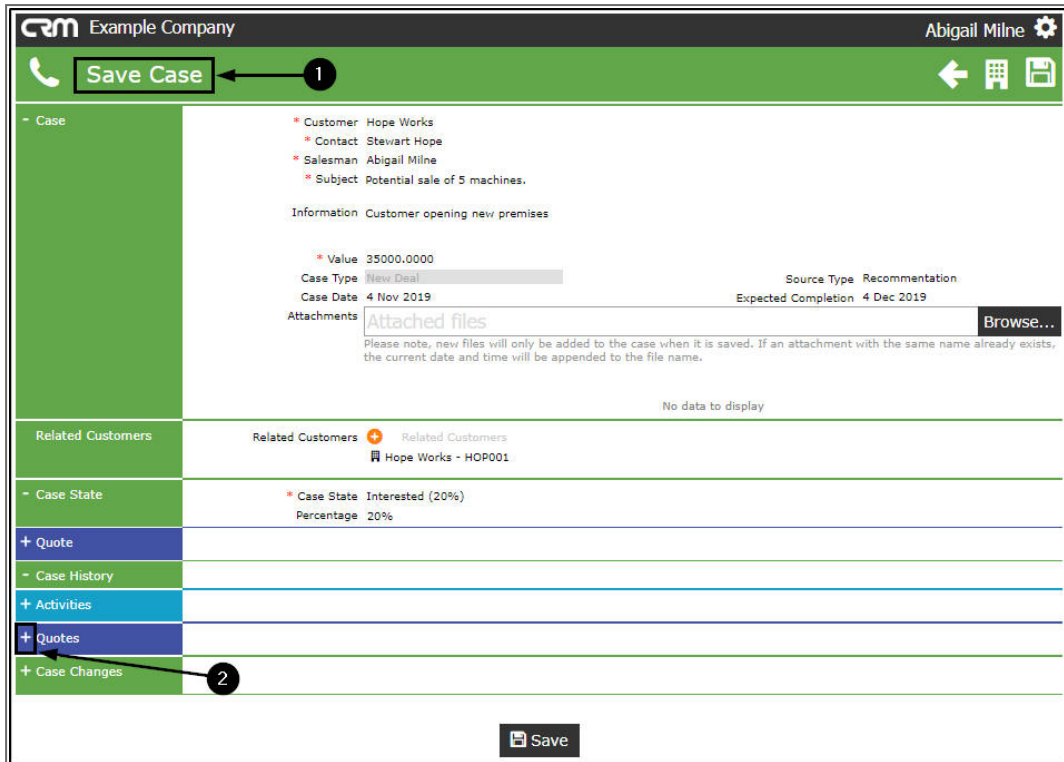
CRM Example Company Abigail Milne

**Cases for Hope Works**

Subject	Contact Name	Customer Name	Case State Description	Is Pipeline Case
test	Customer Kelly Jones , Hope Works			No
SP1589 - client interested	Customer Matthew Thompson , Hope Works			No
Test newest CRM 3.4.3.0	Customer Matthew Thompson , Hope Works			No
new test of case types	Customer Kelly Jones , Hope Works			No
Time will open doors	Customer Kelly Jones , Hope Works			No
Email new brochures	Customer Duncan McCreddie , Hope Works			No
New product range	Customer John West , Hope Works			No
Email updated copier price list	Customer Duncan McCreddie , Hope Works			No
Call Customer to arrange meeting time	Customer Michael Jackson , Hope Works			No
Assess new site for potential machine installation.	Customer John West , Hope Works			No
<b>Potential sale of 5 machines.</b>	Customer Stewart Hope , Hope Works Case Customer opening new premises Value 35000.00 Relative Value 7000.00 Case Date 04 Nov 2019		Case State Interested Percentage 20.00 % Expected Completion 04 Dec 2019	No

Page 1 of 1 (11 items) [1] Page size: 20

1. Either option will take you to the **Save Case** page.
2. Click on the **Expand** icon in the **Quotes** frame.



1. The linked Quote can be [viewed](#), [edited](#), [copied](#), [accepted](#) or [rejected](#) from this **Save Case** page.

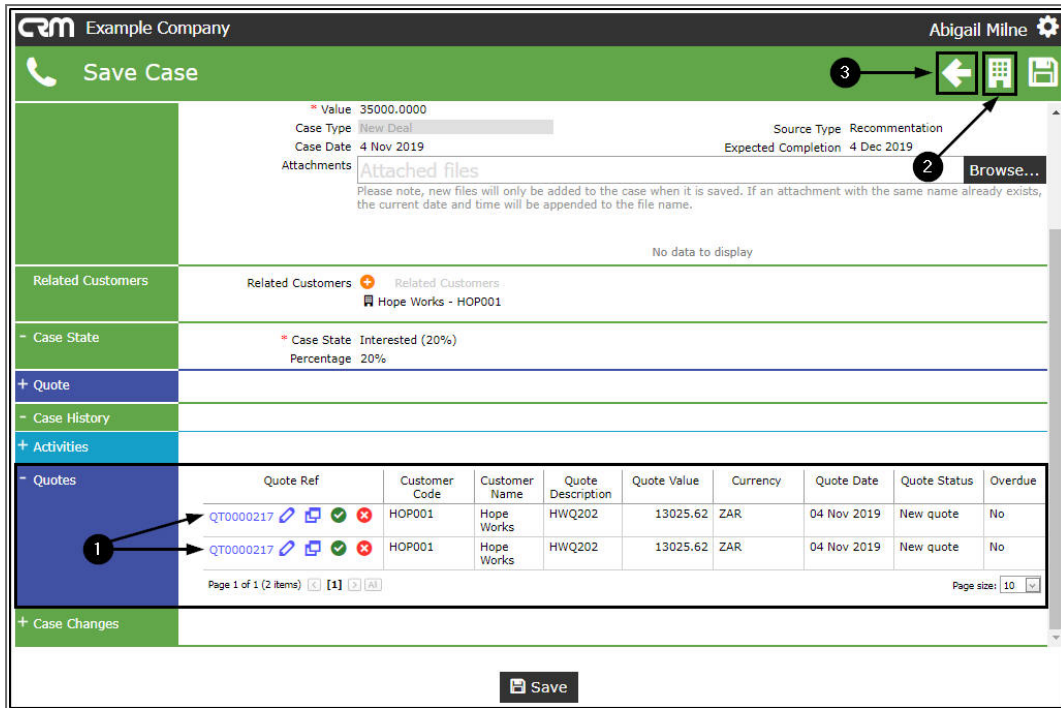
Either

2. Click on **Back**

Or

2. Click on the **Customers** icon

to return to the **Customer Dashboard** (Customer Home page).



## VIEW THE ENTIRE CASE LIST FROM THE DASHBOARD (HOME PAGE)

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

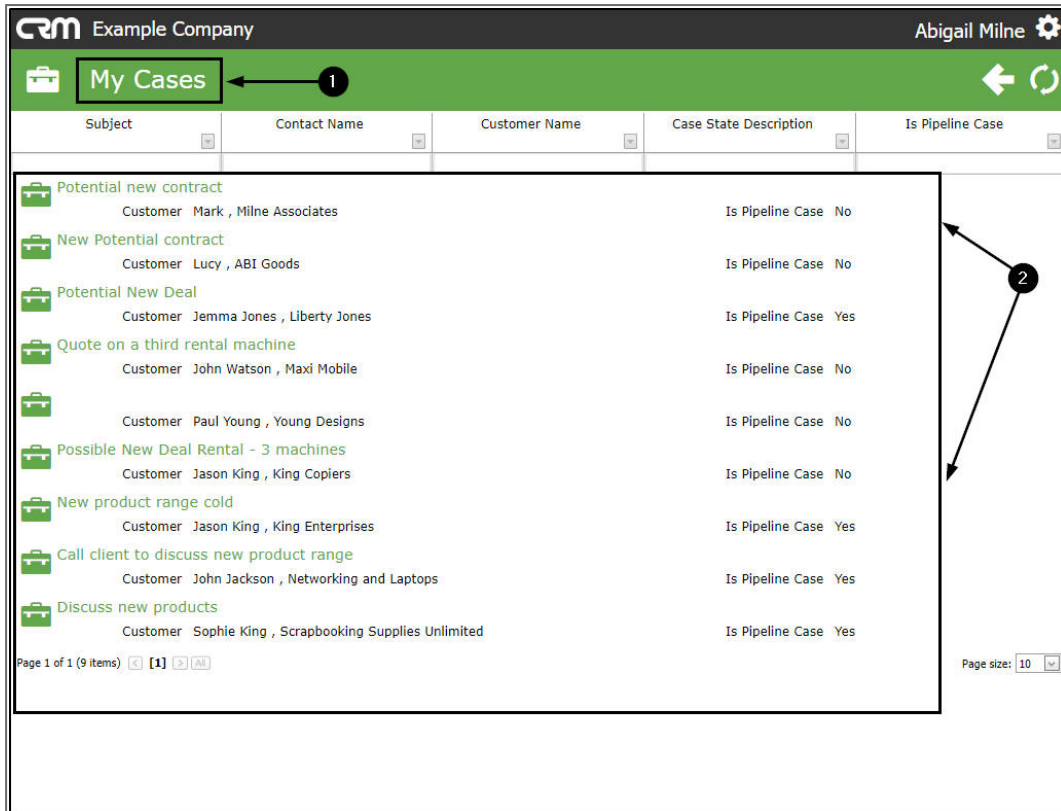
The screenshot shows a CRM dashboard for 'Example Company' with user 'Abigail Milne'. The dashboard features several sections:

- Dashboard:** A navigation menu with a 'Dashboard' link highlighted by a blue box and a '1' notification badge.
- Activities for Last 30 Days:** A table with columns: Description, Target, Existing Custmrs, and New Custmrs.
 

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
- 1 Month Performance:** A bar chart showing performance for Cases, Invoices, Orders, and Quotes.
- 4 Month Pipeline:** A bar chart showing pipeline values for Jul 2019, Aug 2019, Sep 2019, and Oct 2019.
- Navigation Tiles:** A grid of tiles for various functions: create cold call, recommendations, warnings, customers (74), cases (9), activities (9), quotes (5), equipment (147), and 3rd party (4). The 'cases' tile is highlighted with a green border and a '2' callout.
- Case Listing:** A table with columns 'Schedule Date' and 'Status'. A single case is listed: 'Phone call - King Enterprises: Confirm meeting times with new Purchasing Manager'. Details include: When: 23 Jul 2019, 17:00-18:00; Who: Jason King, King Enterprises; Tel: [redacted]; Email: [redacted]; Cell: [redacted]; Bus: 0123456789.

## THE MY CASES LISTING SCREEN

- The **My Cases** listing page will be displayed.
- Here you can view the entire case list for all customers.



1. Hover anywhere over a case in this list to reveal the **Action** buttons.
2. **Single click** on a Case to access a **quick view summary** of the Case information and to view the **Action** buttons.
3. Click on the **Case** icon to return to the **Dashboard** (Home page).

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main heading is 'Cases for King Copiers'. Below it is a table with columns: Subject, Contact Name, Customer Name, Case State Description, and Is Pipeline Case. A single case is displayed with the subject 'Possible New Deal Rental - 3 machines'. A detailed view of this case is shown below the table, containing the following information:

Customer	Jason King , King Copiers	Is Pipeline Case	No
Case		Case State	Meeting
Value	0.00	Percentage	25.00 %
Relative Value	0.00	Expected Completion	21 Jul 2019
Case Date	21 Jun 2019		

Arrows in the image indicate the following actions:

- Arrow 1: Points to the 'Action' menu icon in the top right of the case detail view.
- Arrow 2: Points to the 'Case State Description' column header in the table.
- Arrow 3: Points to the 'Subject' column header in the table.

## Related Topics

- [CRM Basics: Cases.](#)

CRM.002.004