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**

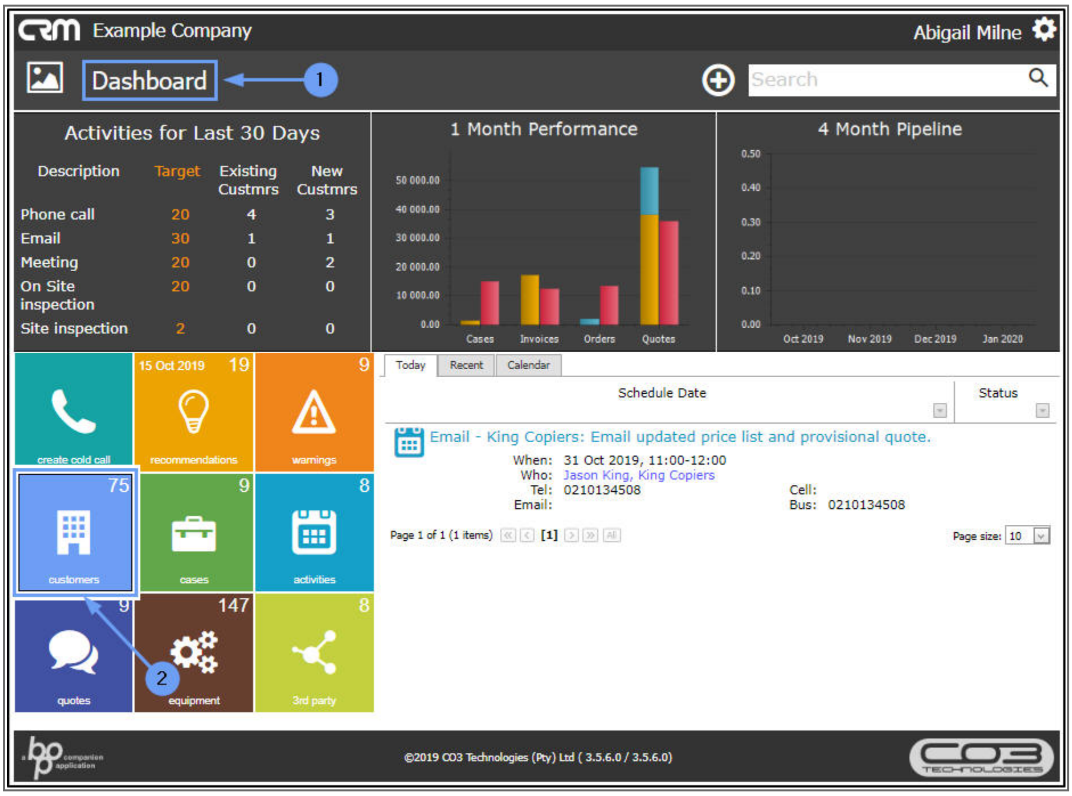
Ribbon Access: Webpage > http://[servername]:[port-no]/BPOCRM/User.aspx

VIEW CUSTOMER SPECIFIC CASE LIST

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

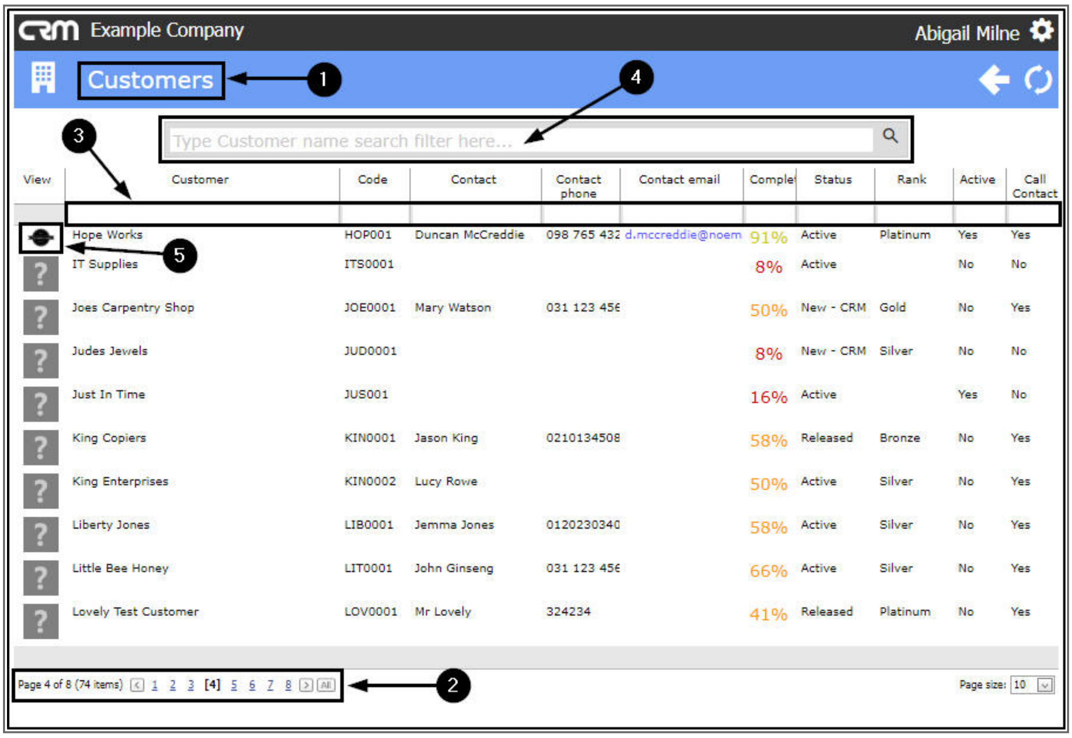
To access a customer specific list of Cases from the **Customer Dashboard** (Customer Home page). You will first need to navigate to the specific Customer Home page).

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



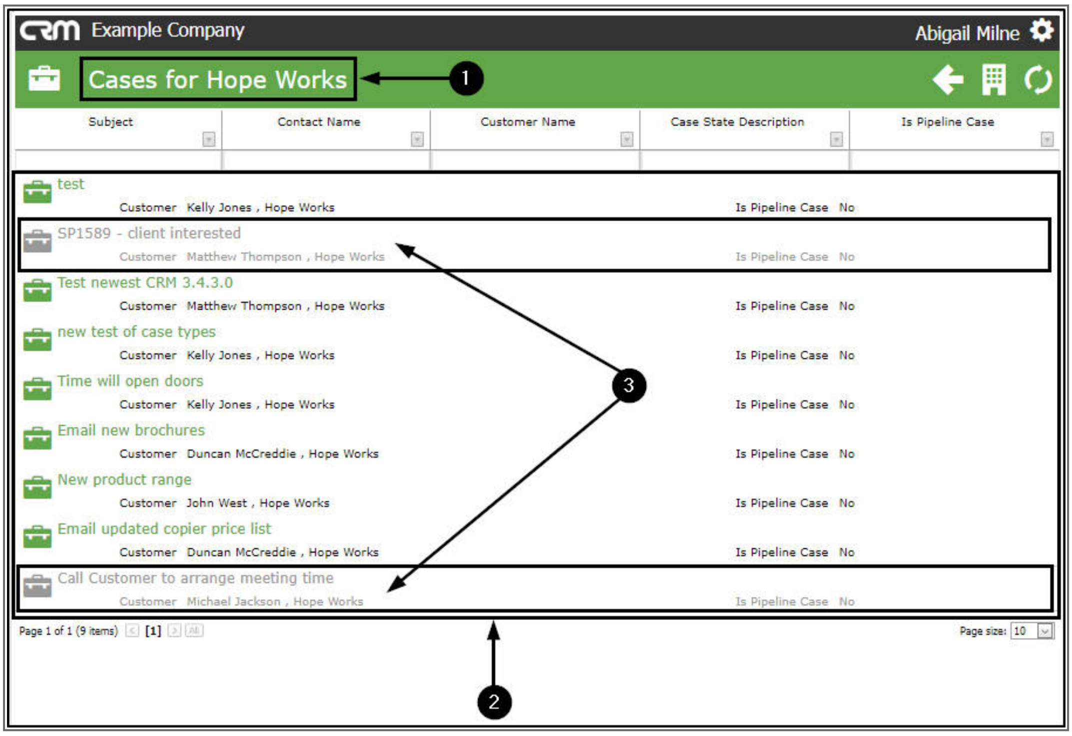
1. The **Customers** listing page will open.
2. You can use the Page Reference field ,

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.

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.

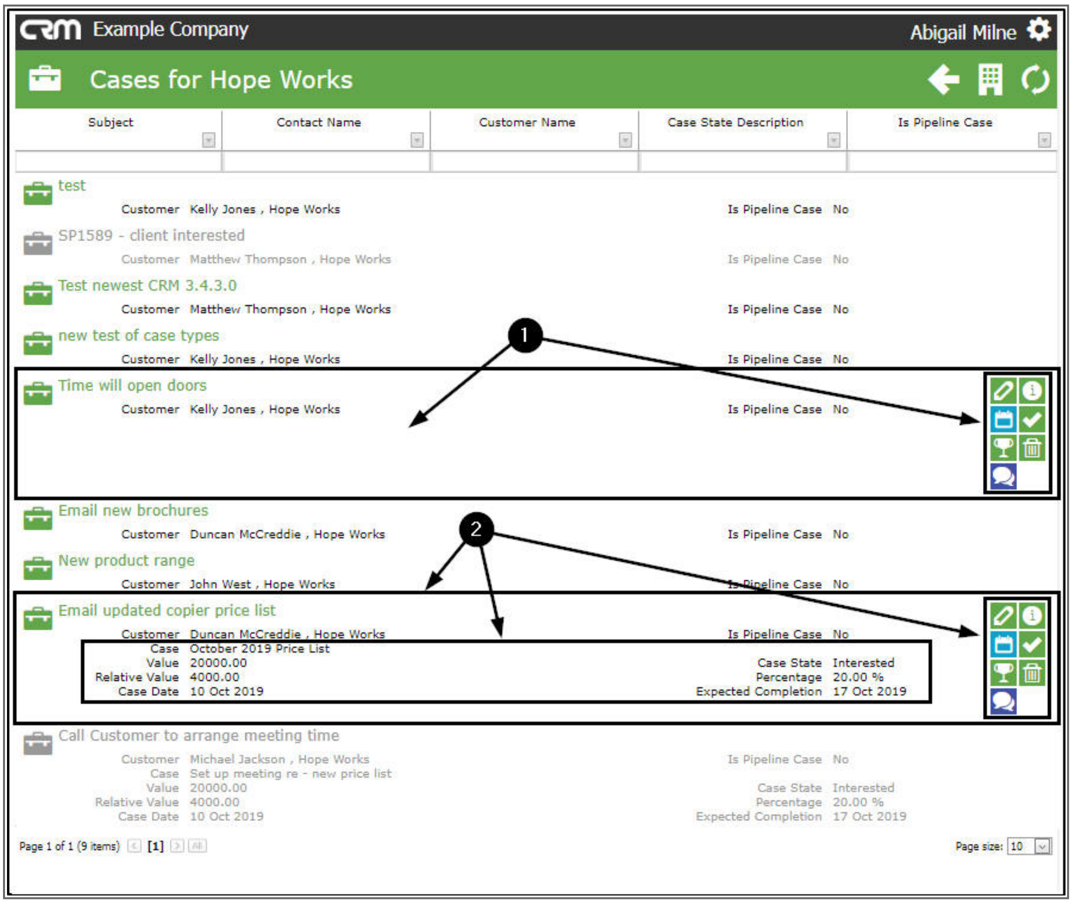


VIEW CASE ACTION BUTTONS

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**

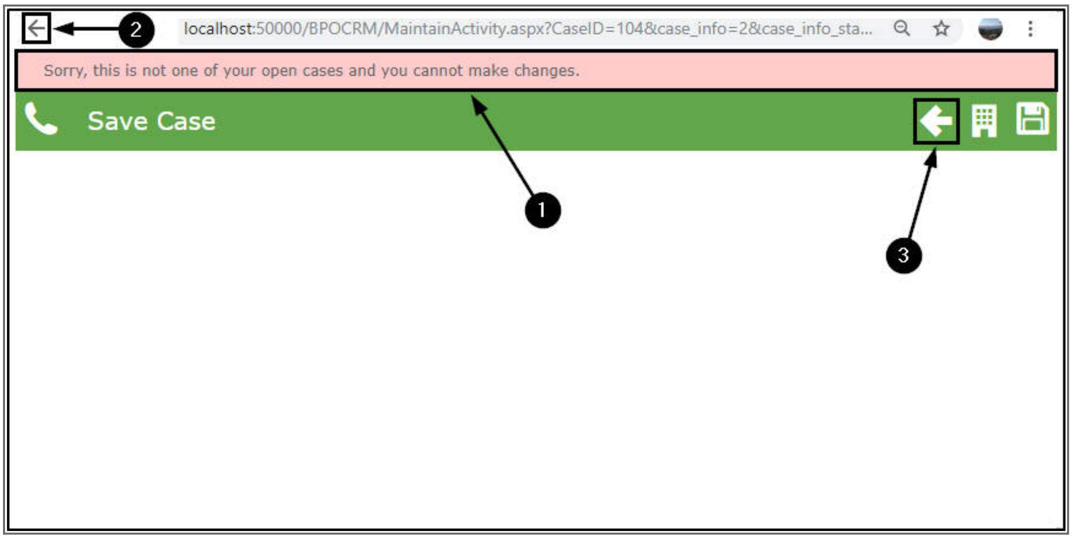
VIEW CASE SUMMARY

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.)



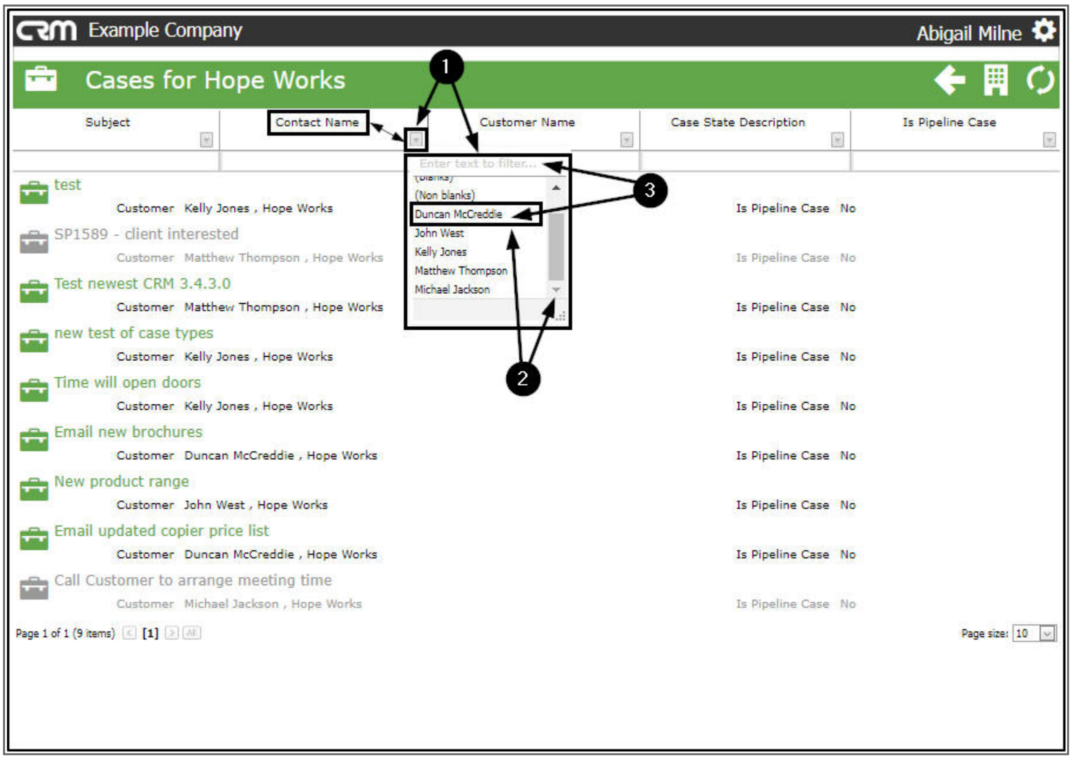
ON CASES WHERE YOU ARE NOT THE SALESMAN

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.



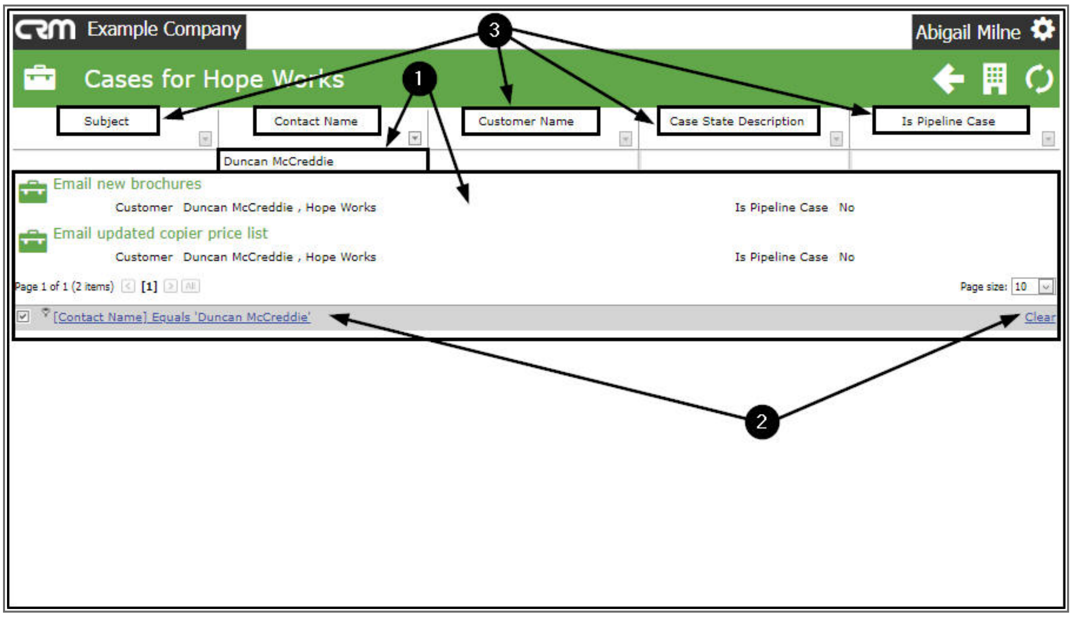
SEARCH FOR CASES USING THE FILTER ROW AND FILTER LIST FUNCTIONALITY

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 <u>all</u> the Cases linked to the customer again.
3. You can search for specific cases in this way using <u>any</u> of the columns:
   - **Subject**
   - **Customer Name**
   - **Case State Description**
   - **Is Pipeline Case**

   and a <u>combination</u> of columns if required e.g. **Customer Name** and**Case Description**.

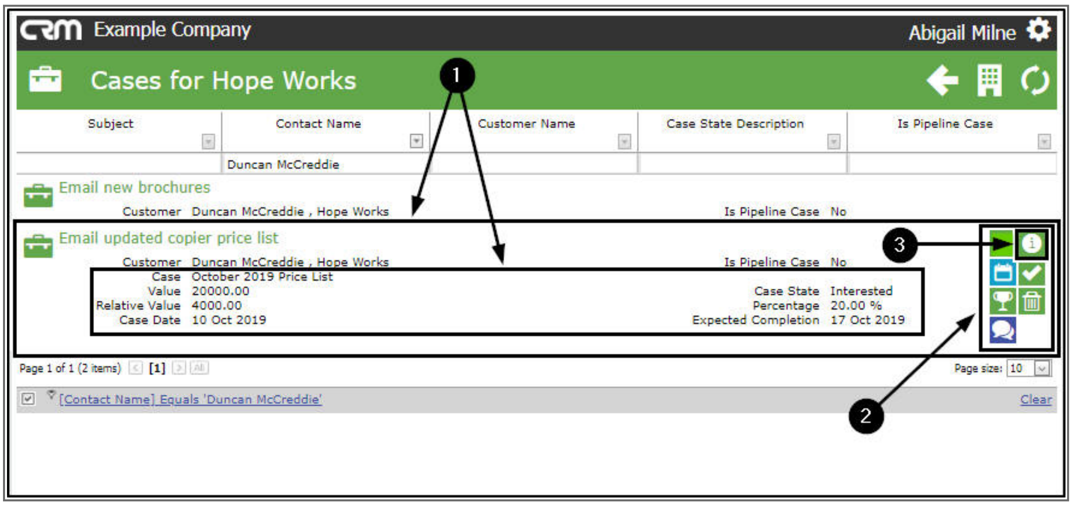


1. **Single click** on an open Case in this page to display the **summary** of the Case information and to reveal the
2. **Action Item** buttons:

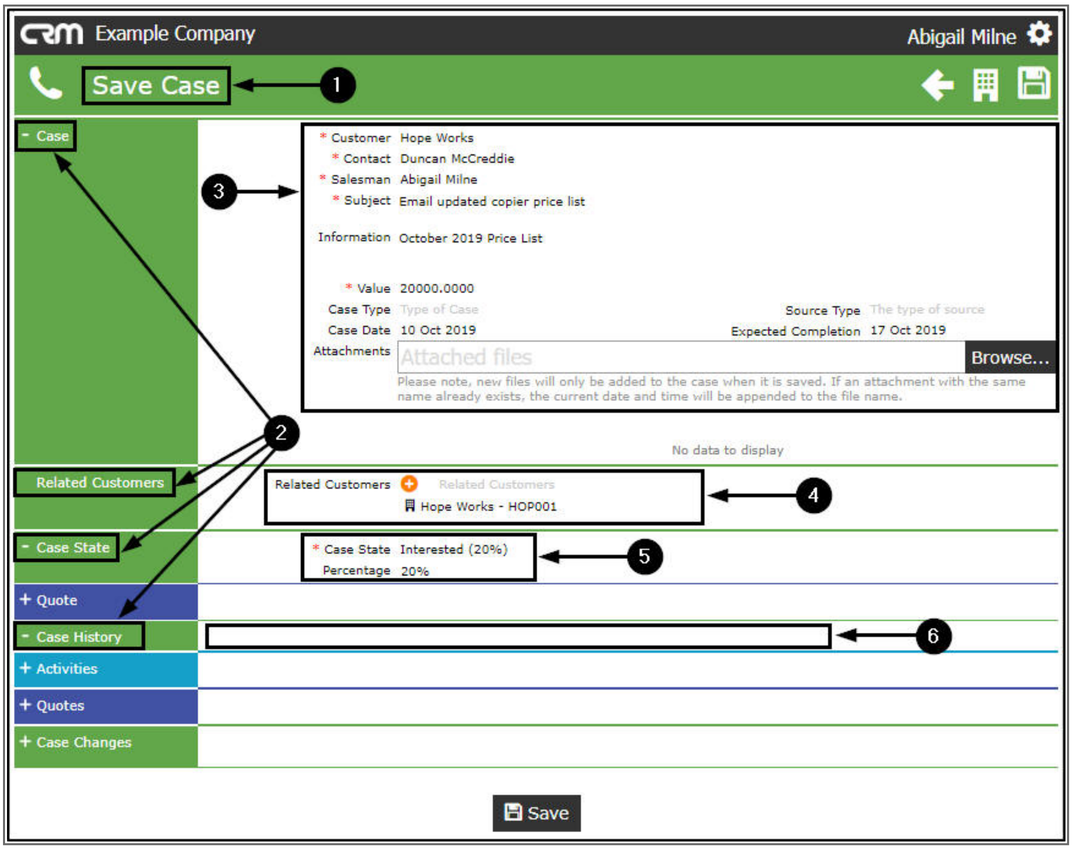
CASES - ACTION BUTTONS

VIEW CASE INFORMATION AND HISTORY

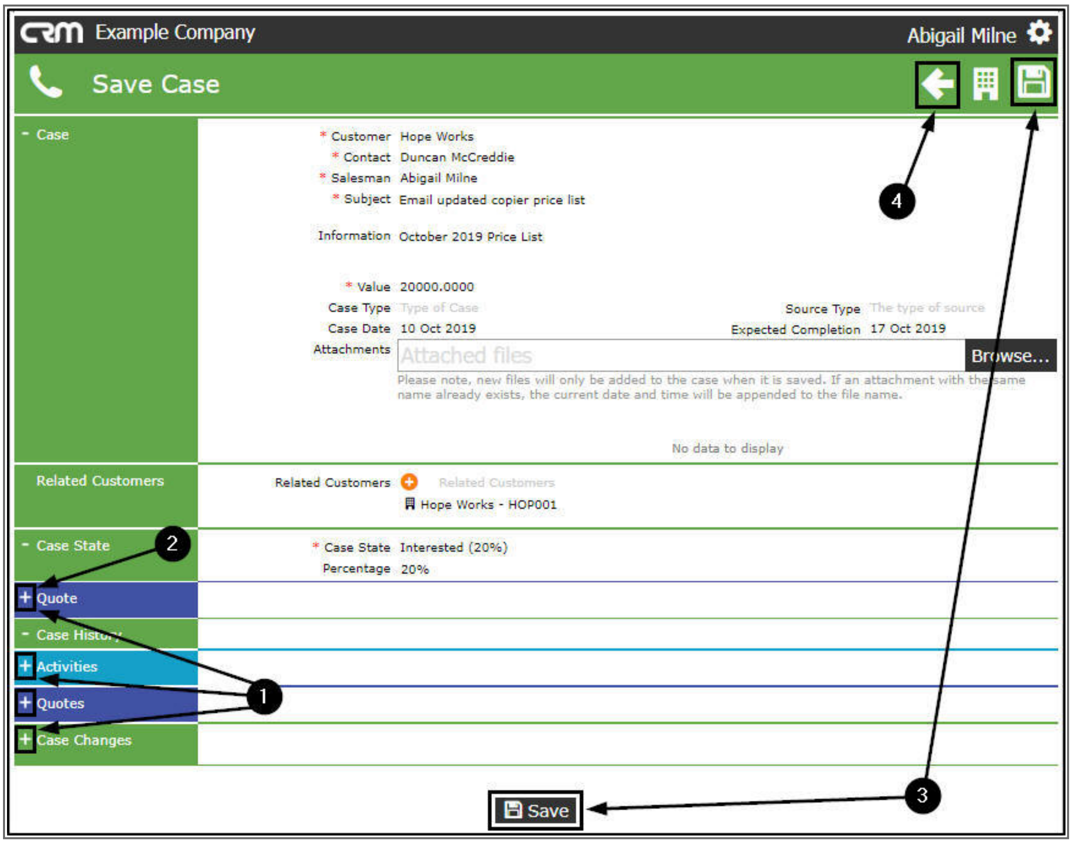
3. Click on the **View Case Info and History** icon.



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.

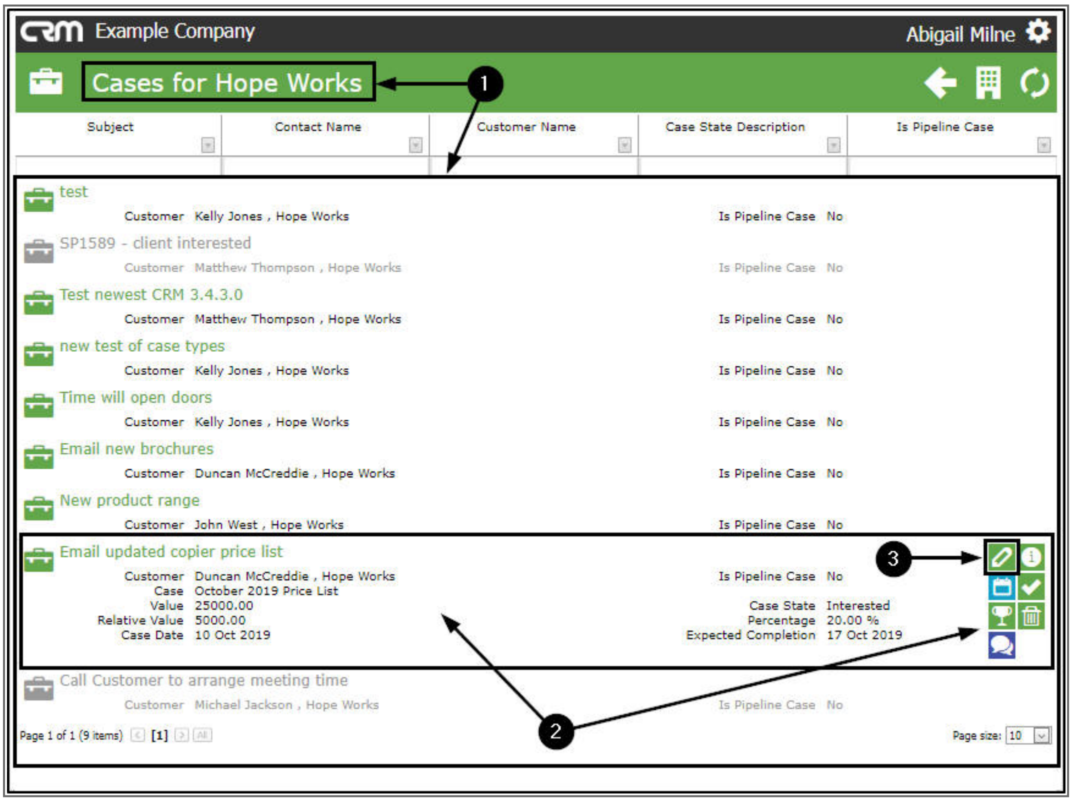


1. Click on the **expand** icon in any of the collapsed frames to **view** and/or **add** or **edit** the content, if required.
2. In this page, you can link a **Quote** to this Case. Refer to Add a new Quote linked to this Case for more information.
3. Click on **Save** to apply any changes.
4. Click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



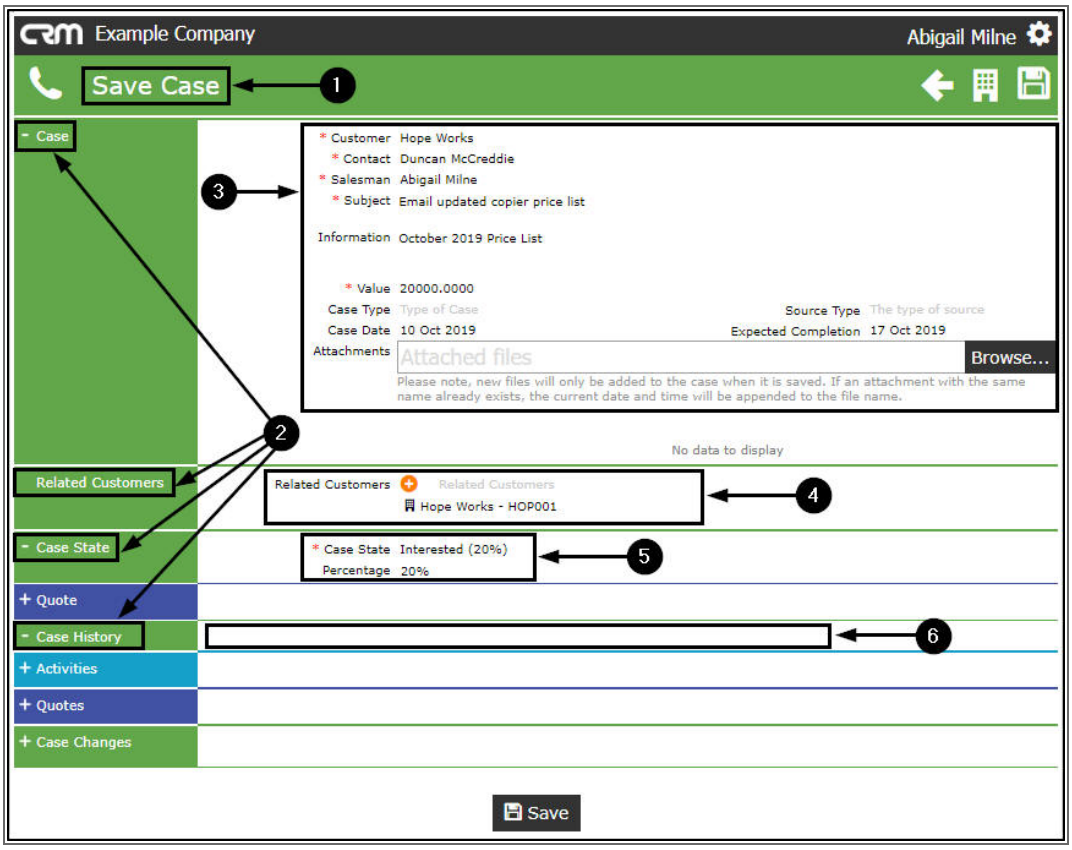
VIEW / EDIT THIS CASE

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.

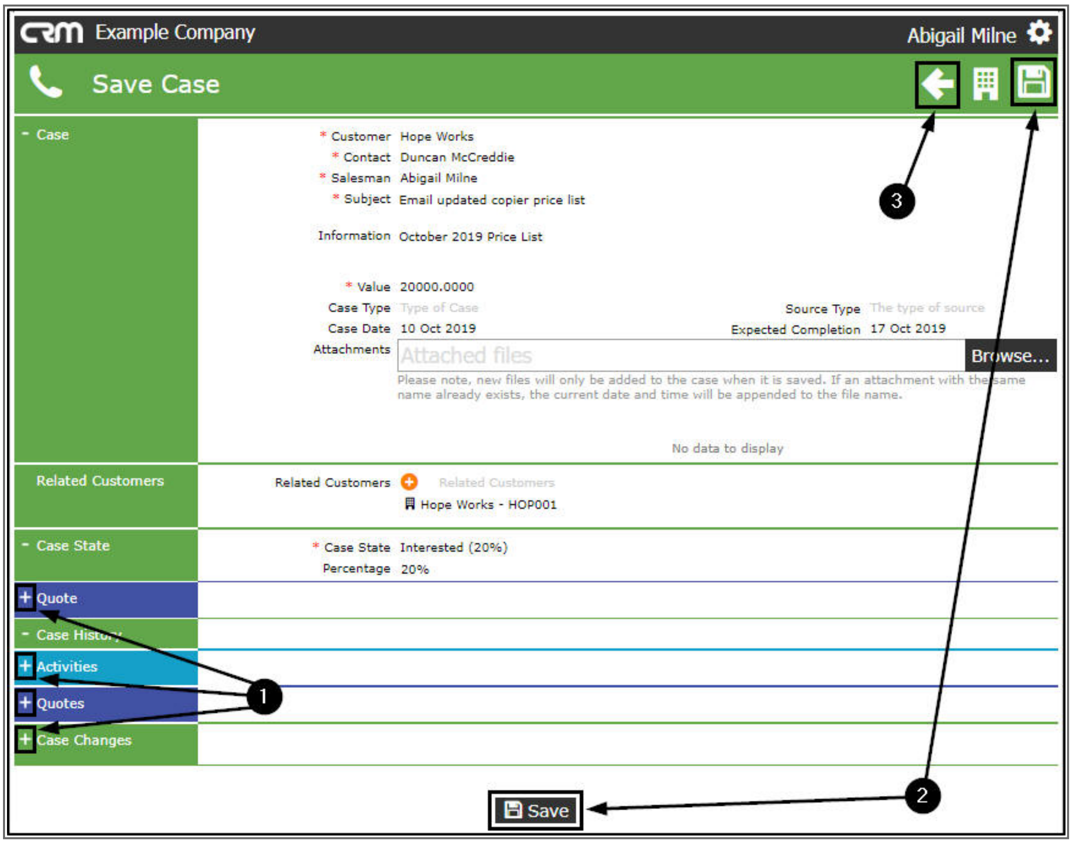


1. The **Save Case** page will be displayed.
2. The following frames will be auto-expanded:
3. **Case**
    - You will note that the case details are auto populated. You can edit all these details, except for the Customer, Salesman, Subject and Information fields.
4. **Related Customers**
    - You will 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.

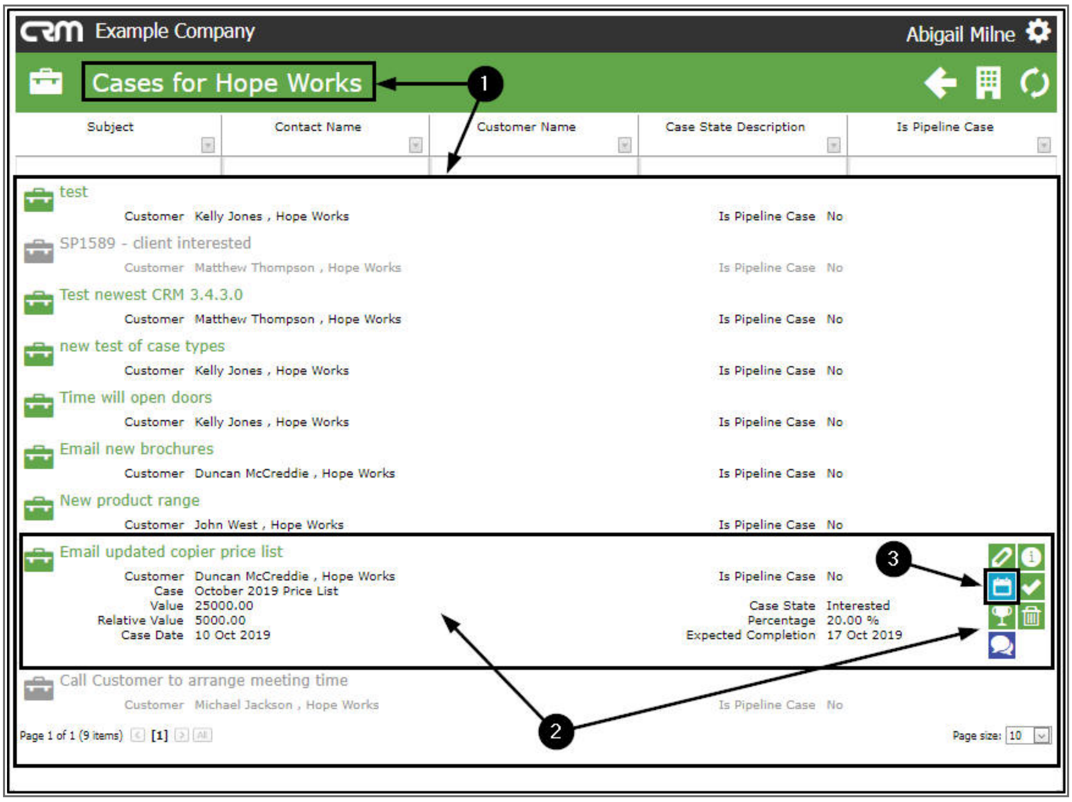


1. Click on the **expand** icon in any of the collapsed frames to **view** and/or **edit** the content, if required.
2. Click on **Save** to apply any changes or
3. Click on the **Back** button to return to the previous page.



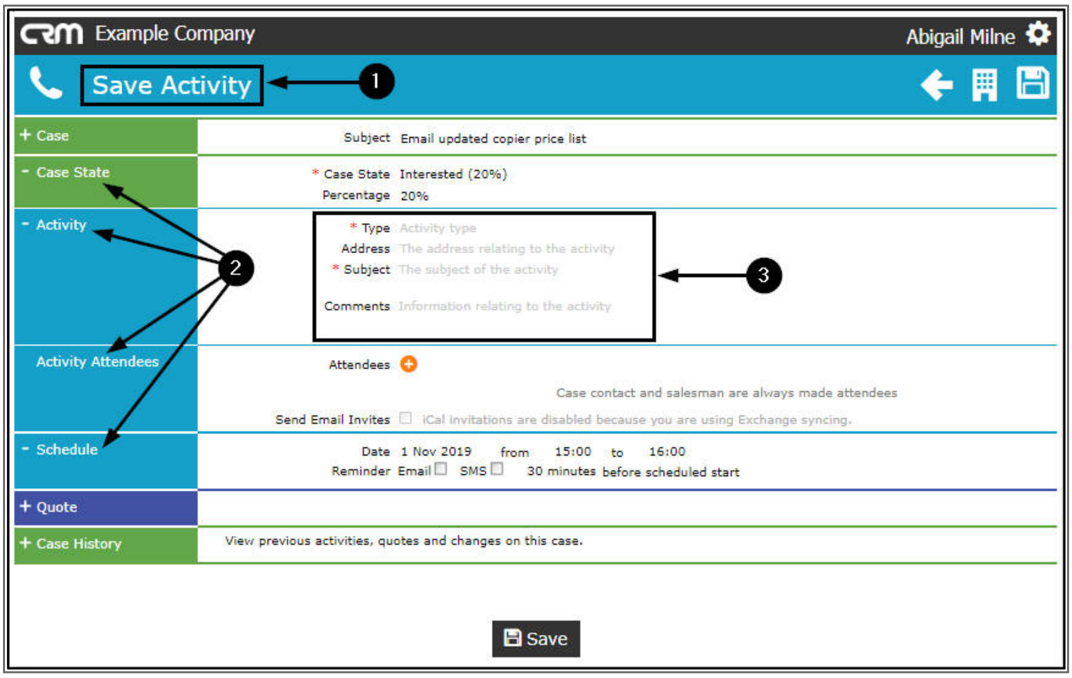
NEW ACTIVITY

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.

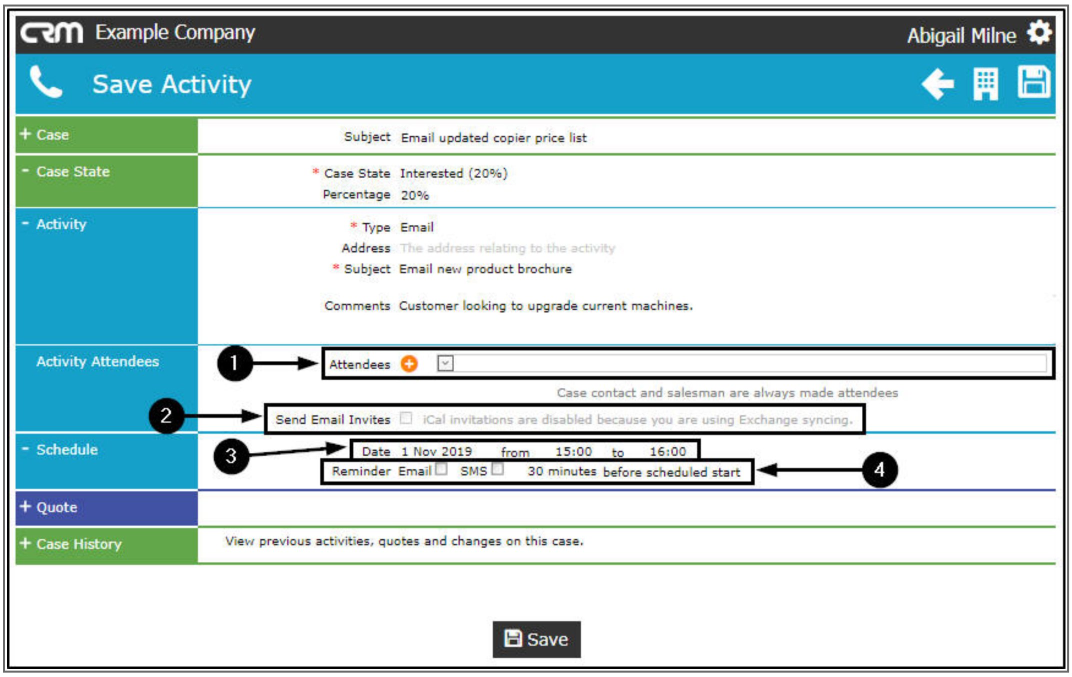


1. The **Save Activity** page will be displayed.
2. The following frames will be auto-expanded:
    - **Case State**
    - **Activity**
    - **Activity Attendees** and
    - **Schedule**
3. Update the Activity Information:
    - **Type**:
        - Click in the **Type** field to display an **Activity 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).

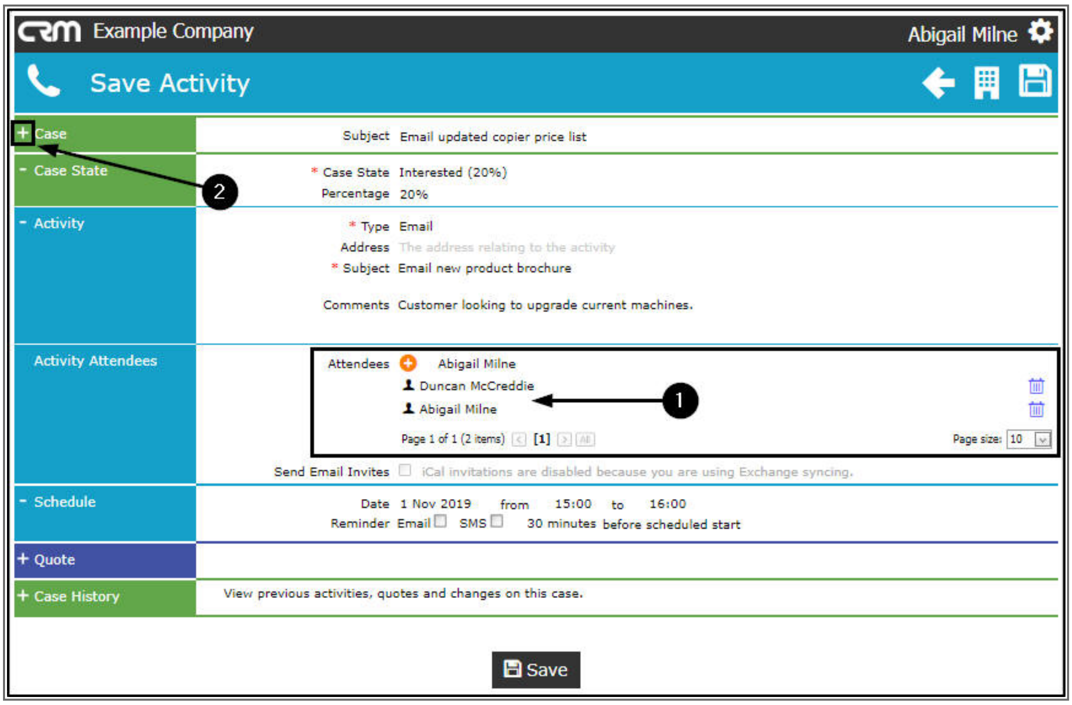


1. You can select Attendees to link to the activity.
   - In this field you can select from **employees** and the **current customer contacts**.
2. You can select to Send Email Invites in order to have the system send an email invite for this activity, to all attendees.
3. Schedule the Date and Time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

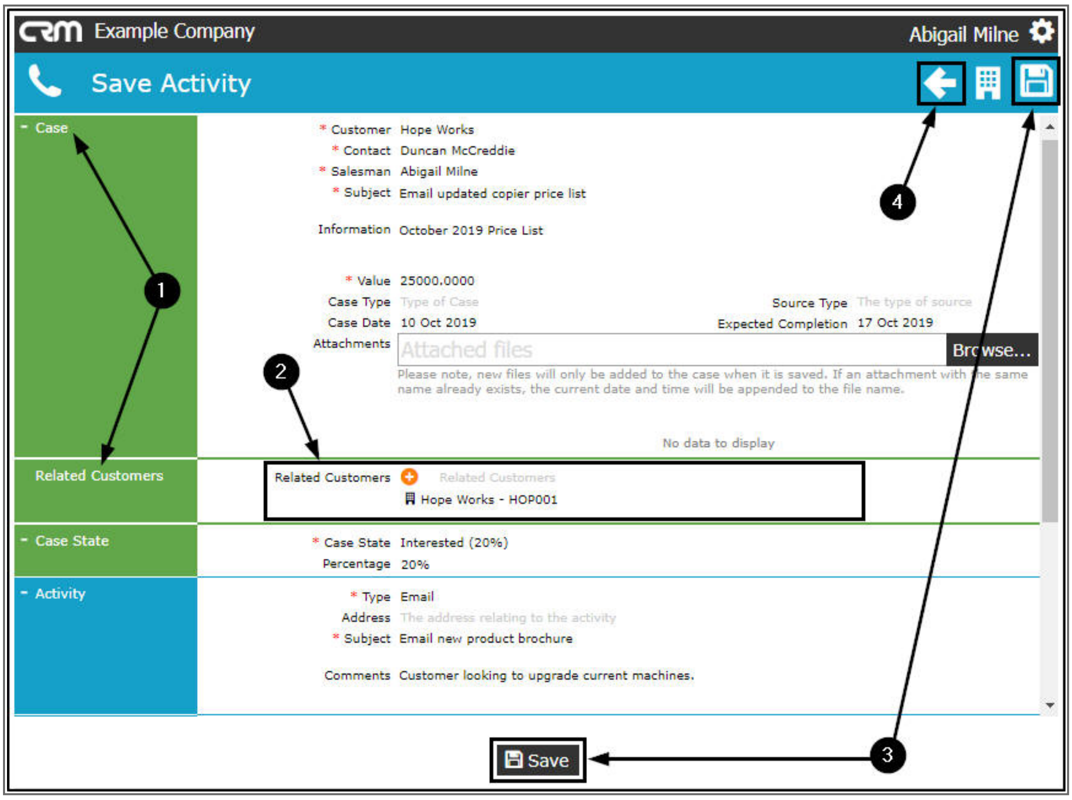


Add Related Customers

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.

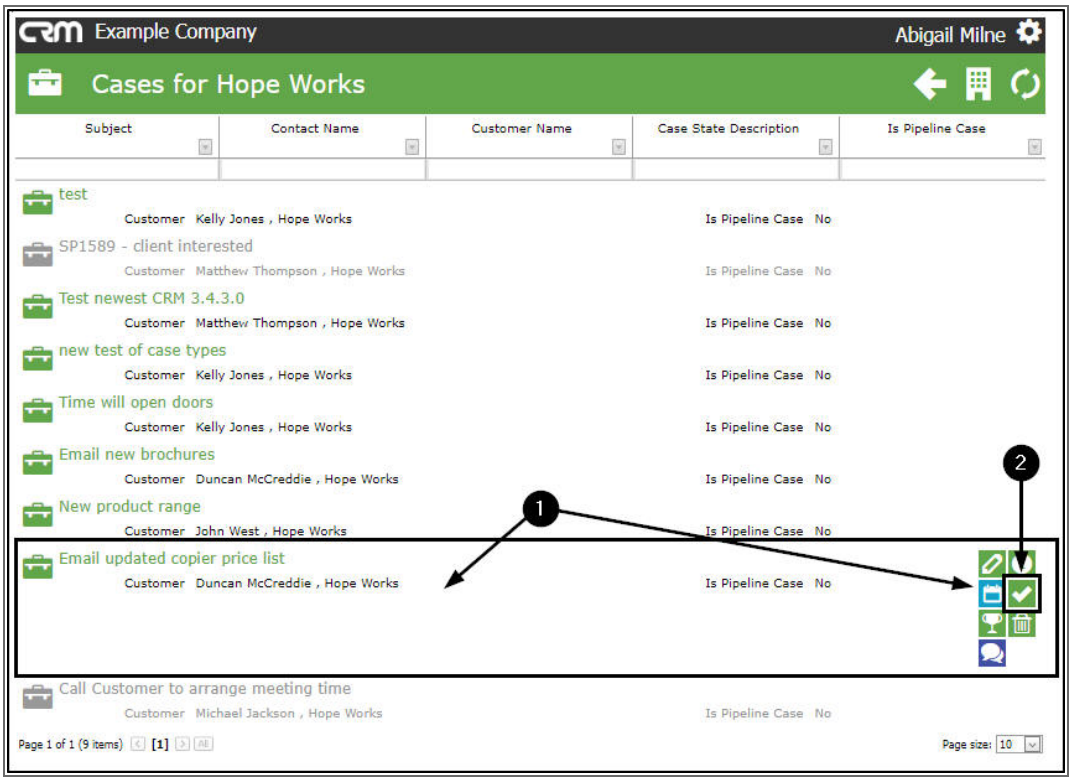


1. The Case frame will be expanded to reveal the **Related Customers** frame.
2. Follow the process to add the related customer(s), if required.
3. When you have finished adding the new activity details for this case, click on **Save** to return to the previous page .
4. If you do not wish to save any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

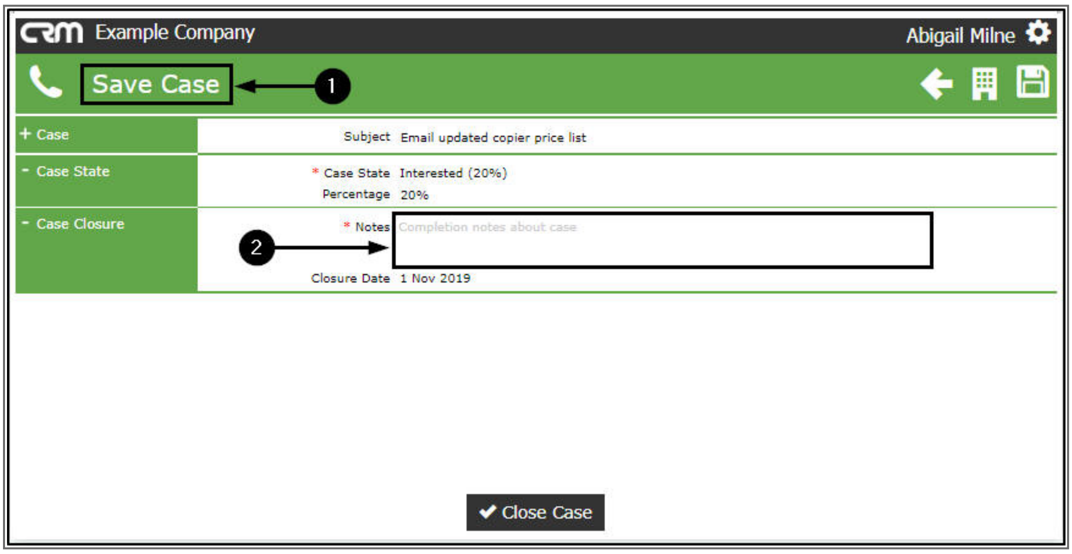


CLOSE THIS CASE

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.



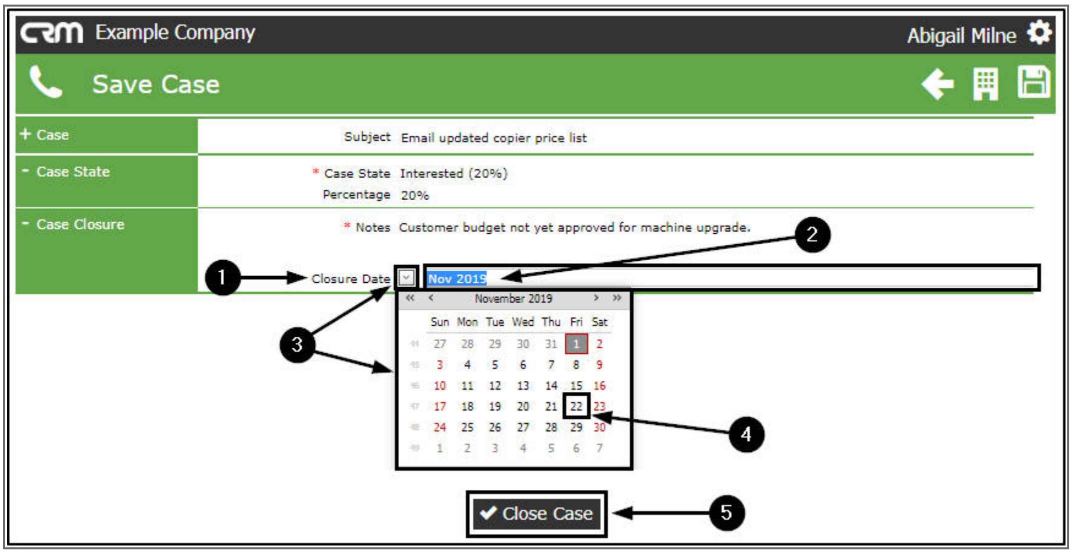
1. The **Save Case** page will be displayed.
2. Type a completion note/explanation in the **Notes** field (e.g. Customer budget not yet approved for machine upgrade).



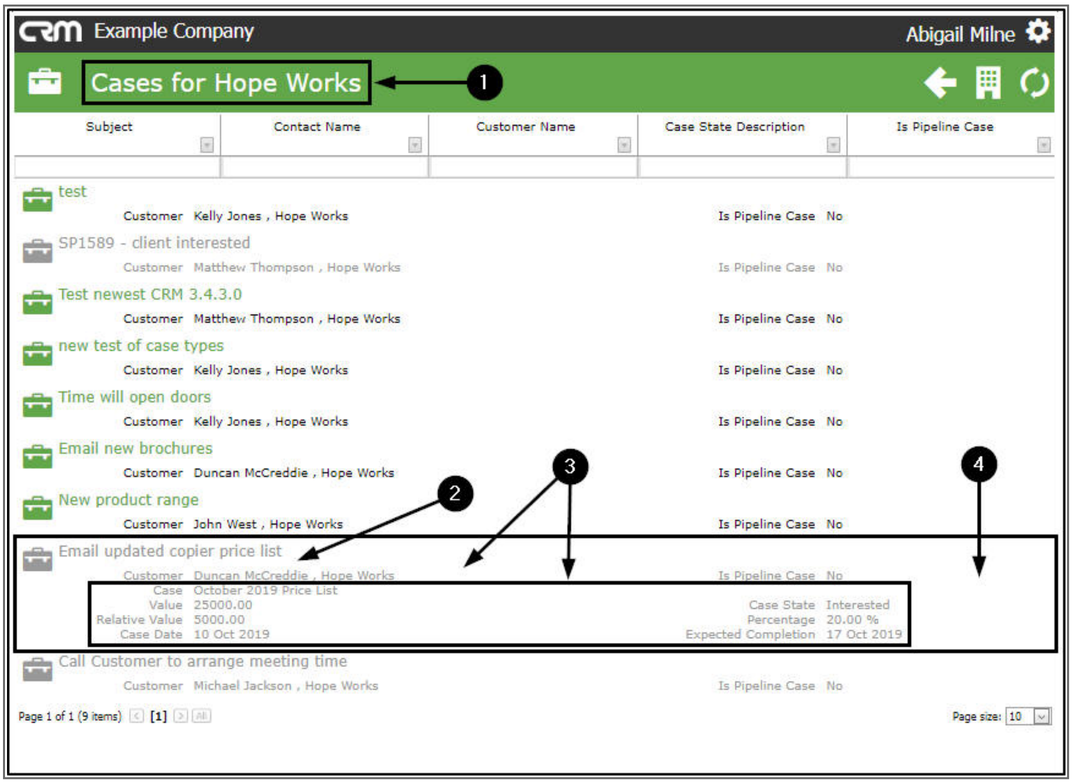
1. The **Closure Date** will auto populate with the current date.

    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**.



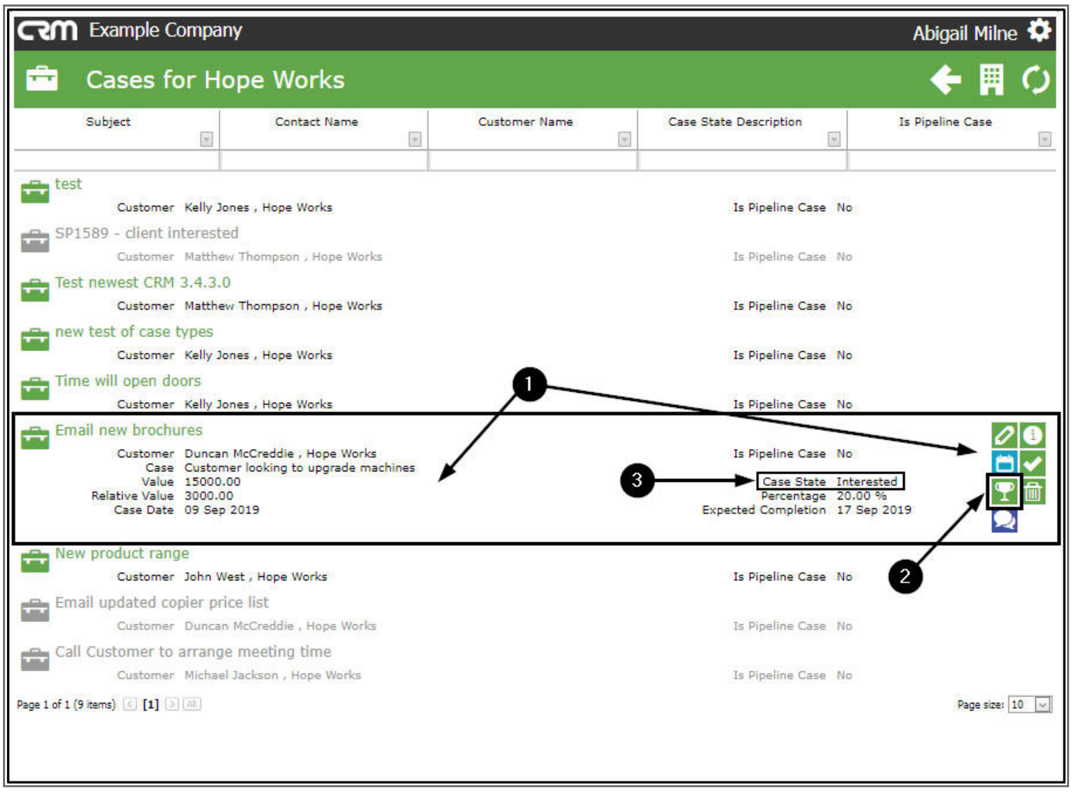
1. You will return to the **Cases for [**selected customer**]** listing page.
2. The recently closed Case will now be **greyed out** in this list.
3. You can single click on the closed Case to view the Case **Summary**.
4. You will note that the **Action Item buttons** are no longer available for this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



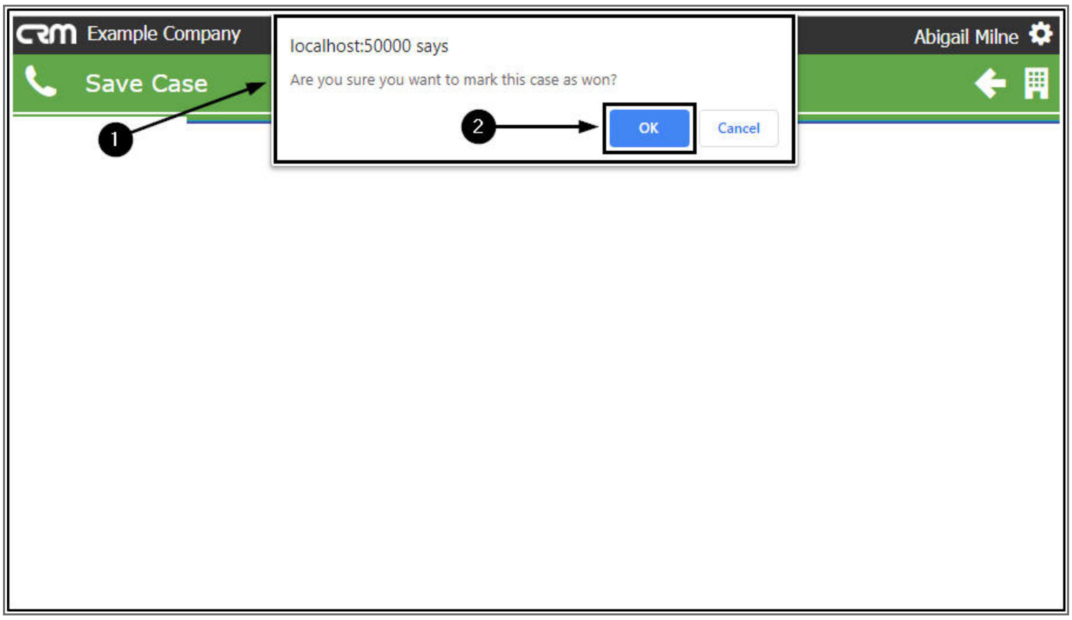
WIN A CASE

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**.

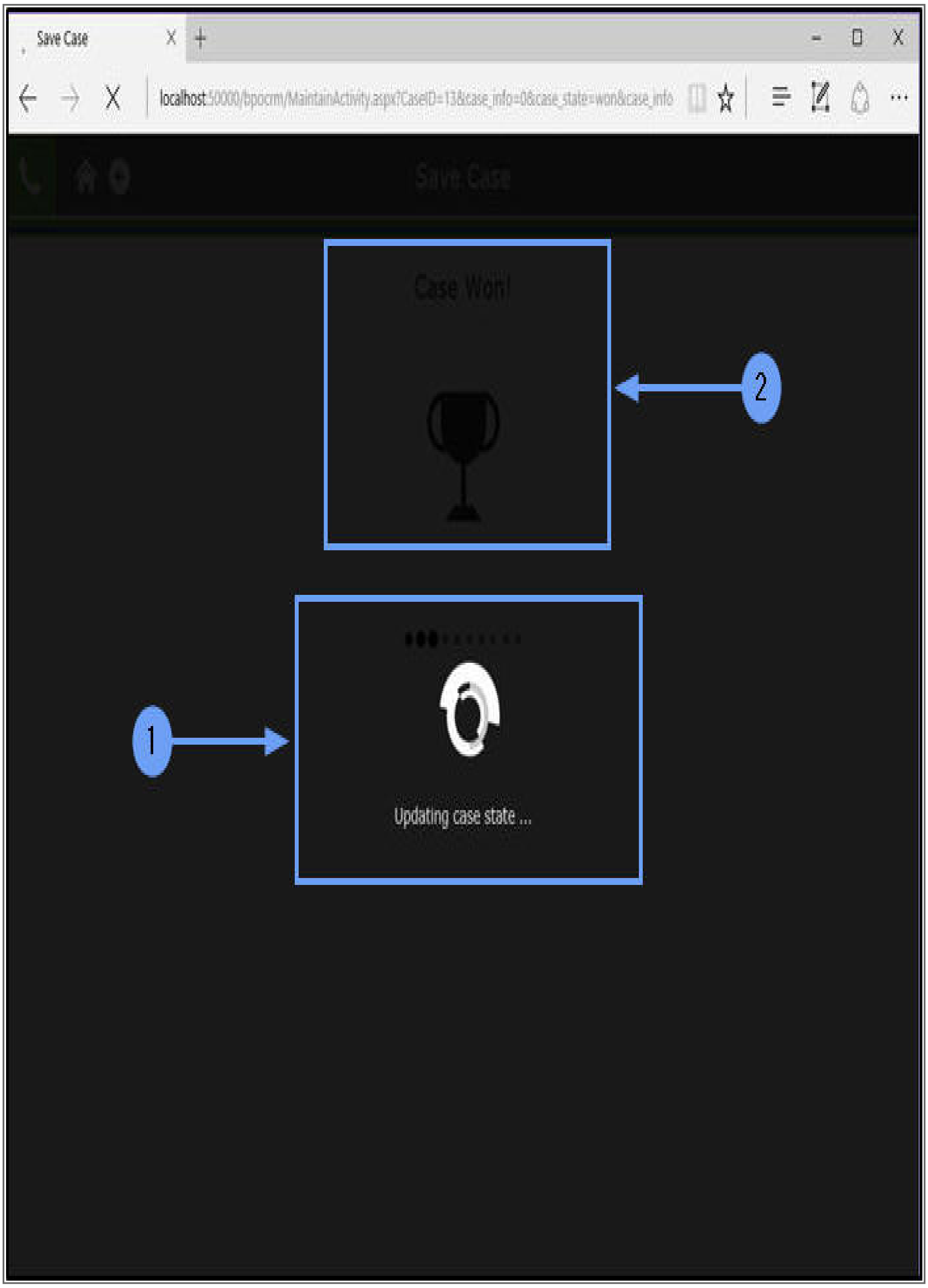
> **Note**: A Case cannot be Won via Case Action Buttons - if this Case Type has Stage Gates Enabled. All Stage Gate Questions will need to be responded to, in order to 'Win the Case'.



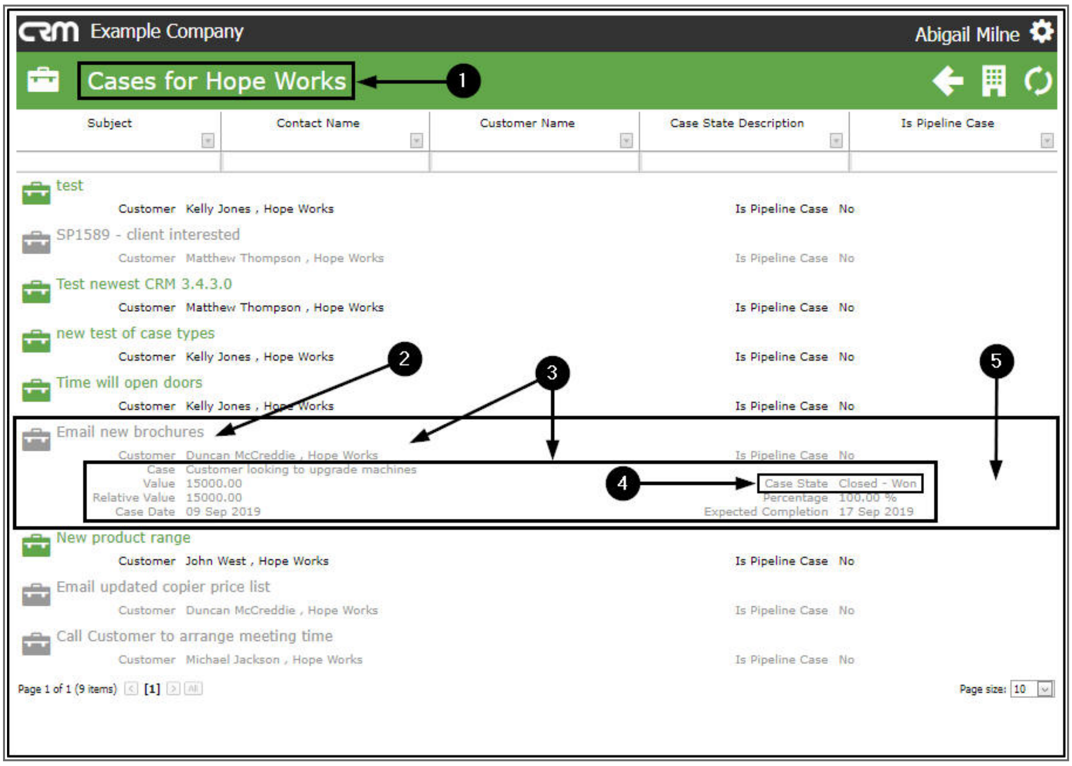
1. A message box will pop up asking:
    - **Are you sure you want to mark this case as won?**
2. Click on **OK**.



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

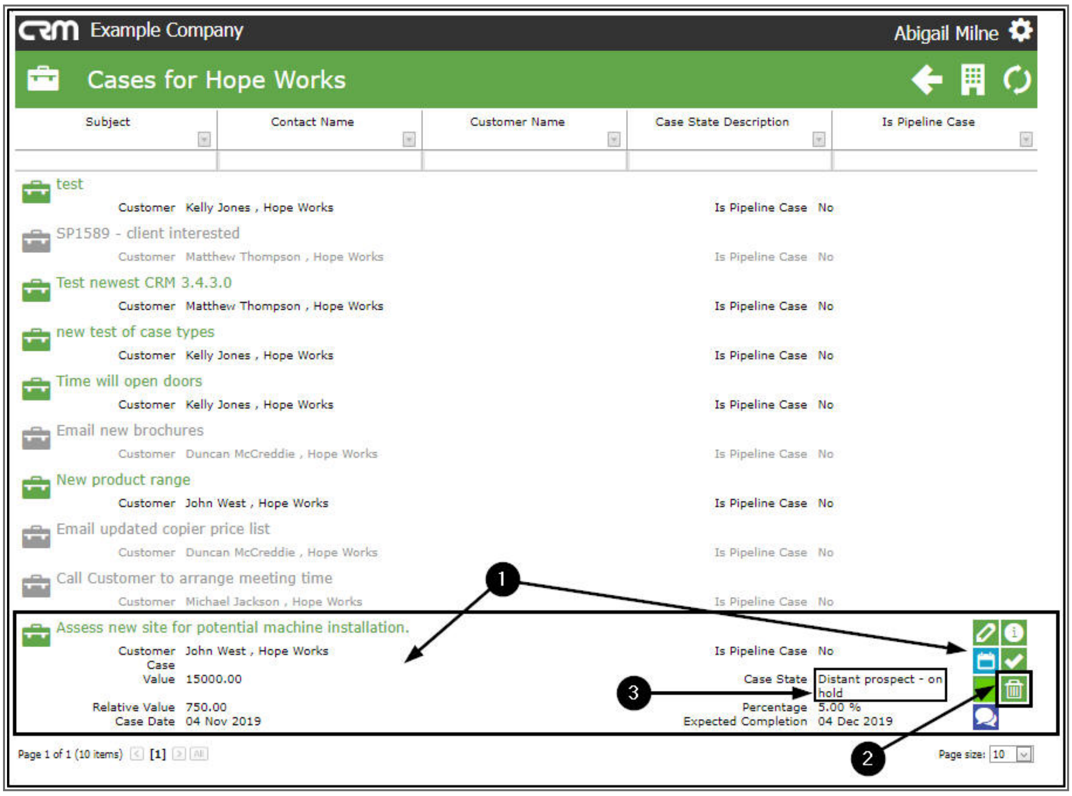

Save Case
localhost:50000/bpocrm/MaintainActivity.aspx?CaseID=13&case_info=0&case_state=won&case_info
Save Case
Case Won!
2
1
Updating case state ...

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.

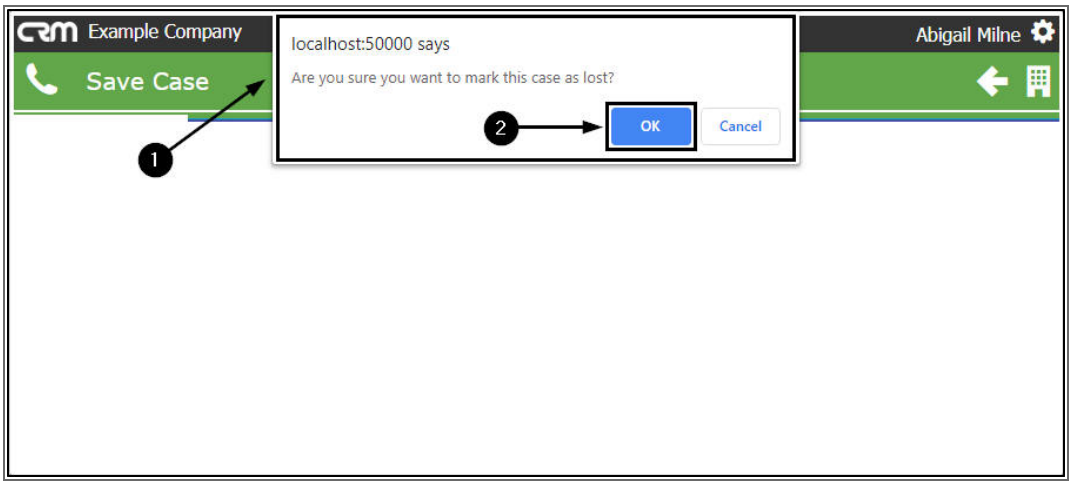


LOST THIS CASE

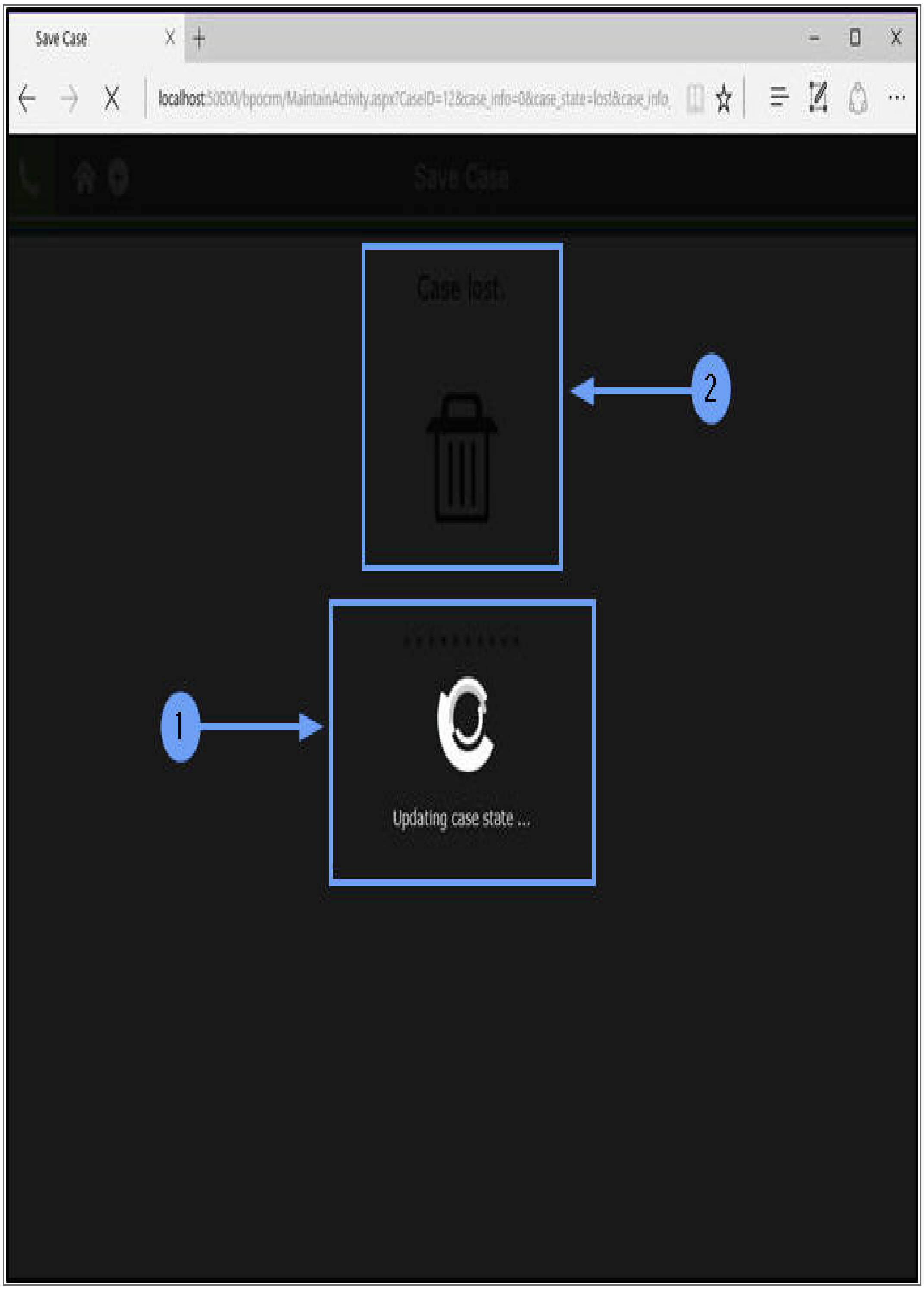
1. In the **Cases for [**selected customer**]** page, hover anywhere over an open Case to display the **Action Items** buttons.
2. Click on the **Lost this Case** icon.
3. Note that the current **Case State** is **Distant Prospect - on hold**.



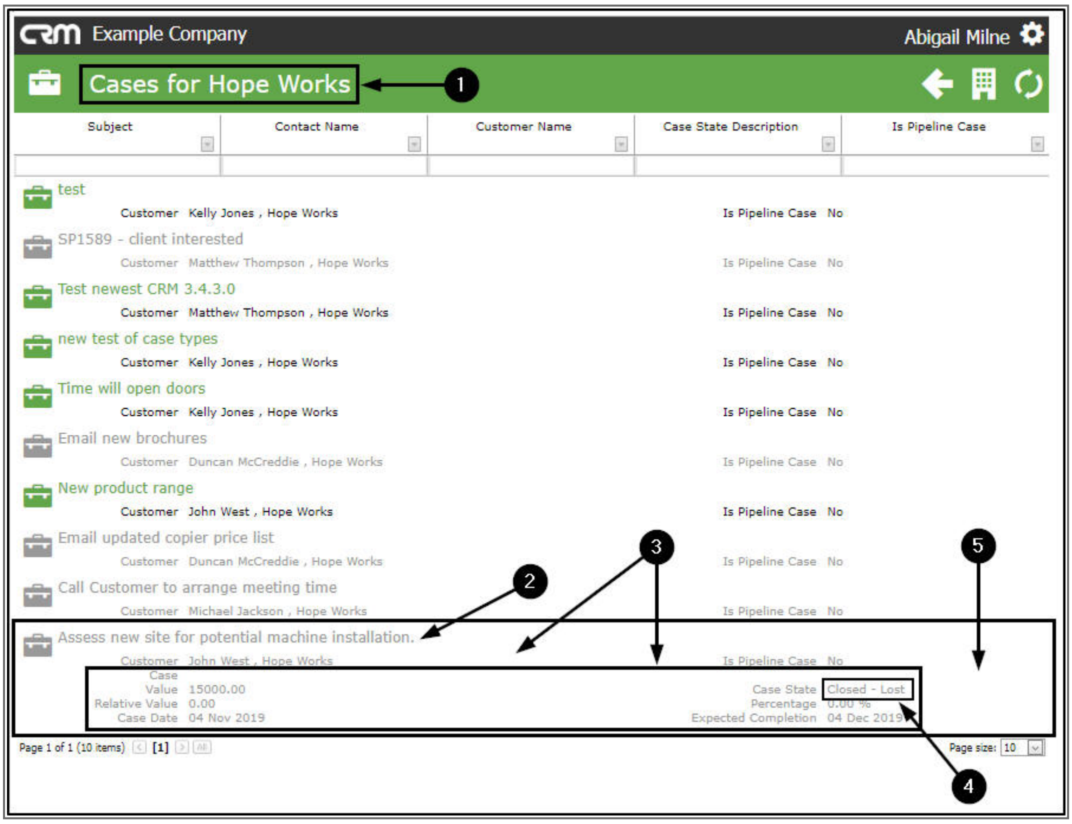
1. A message box will pop up asking:
    - **Are you sure you want to mark this case as lost?**
2. Click on **OK**.



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


Save Case
localhost:50000/bpocrm/MaintainActivity.aspx?CaseID=12&case_info=0&case_state=lost&case_info
Save Case
Case lost.
2
1
Updating case state ...

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 <u>no longer</u> available for this Case.



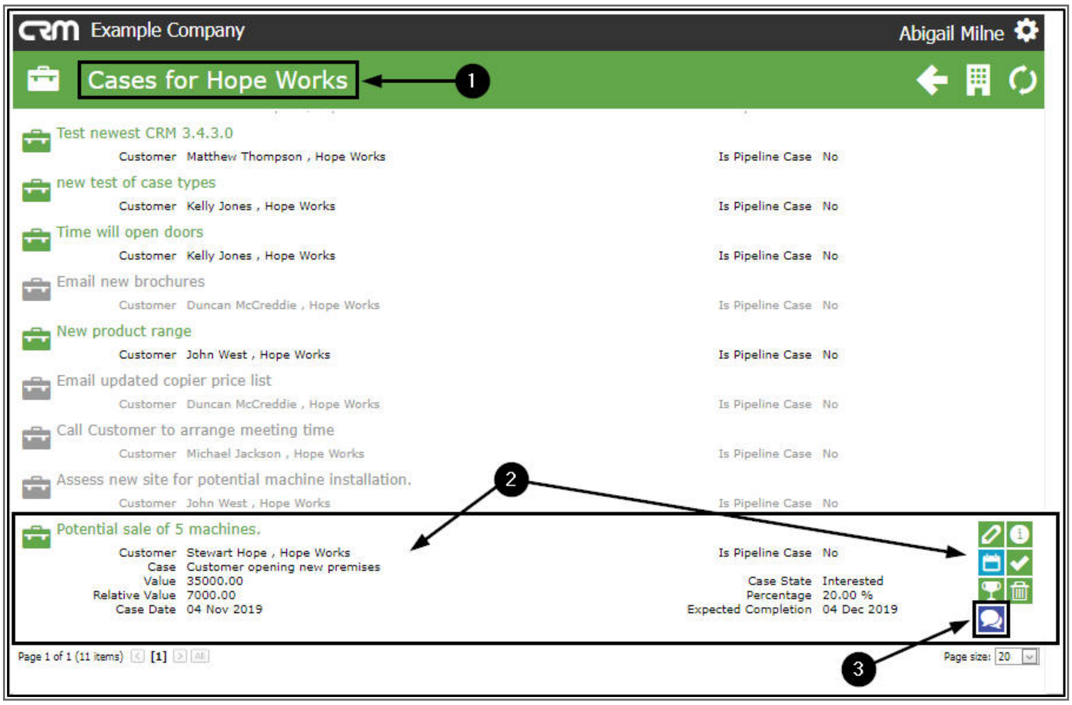
ADD A NEW QUOTE LINKED TO A CASE

- 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.

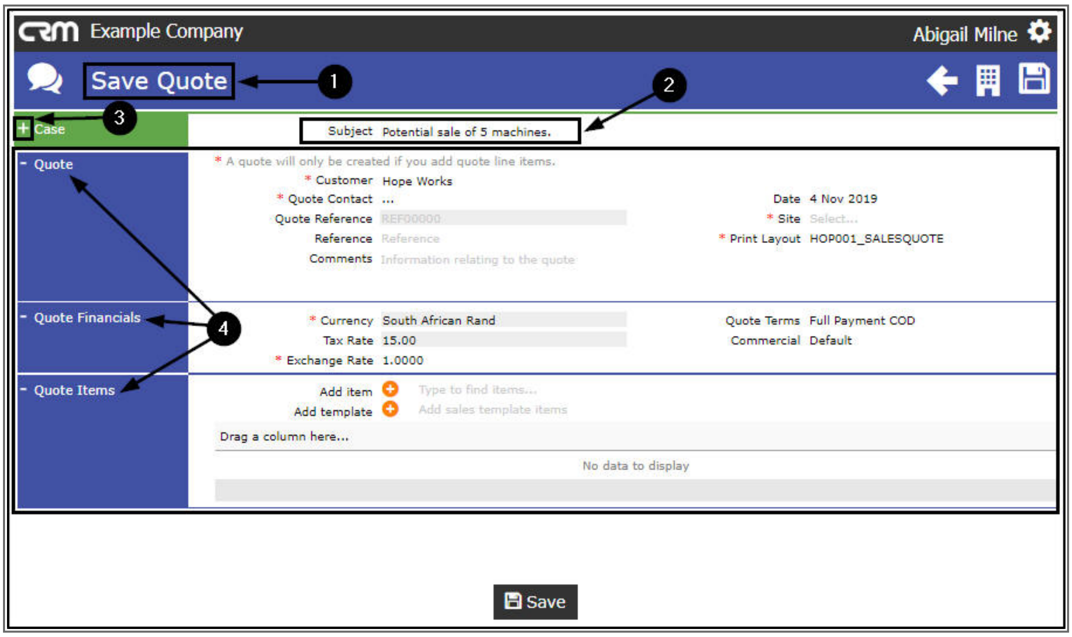


1. The **Save Quote** page will open.

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**

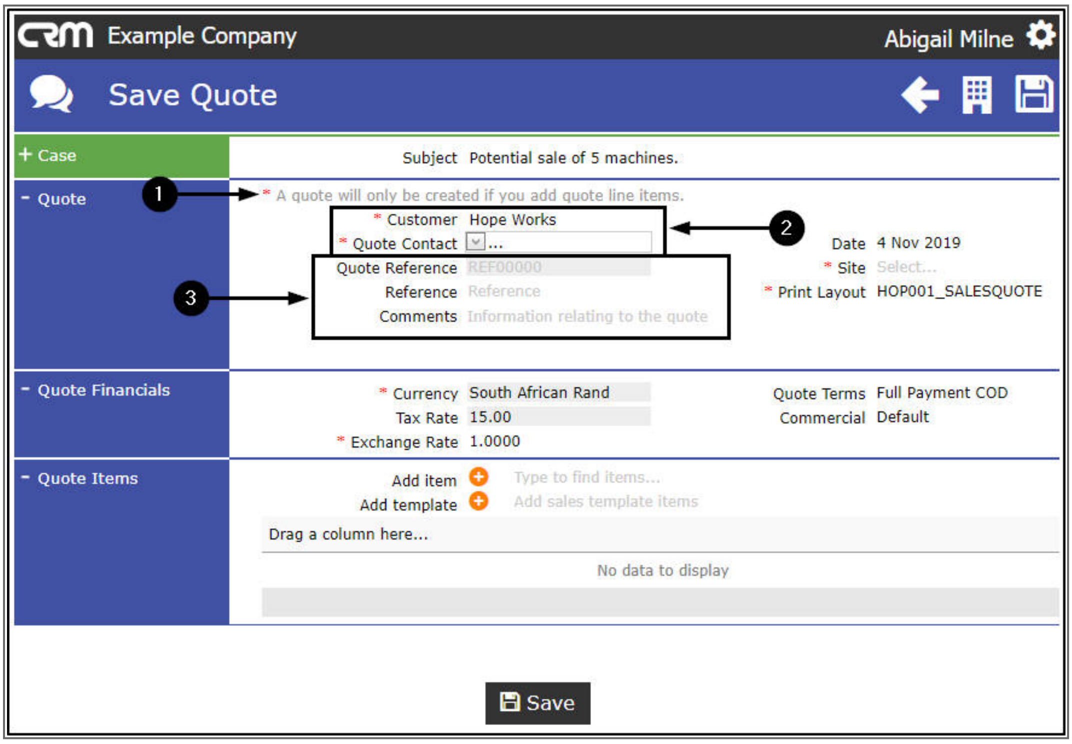
Note: If you are linking a Quote from the **Save Case** or **Save Activity** pages then you will need to expand these frames manually.



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 altern-ative 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.

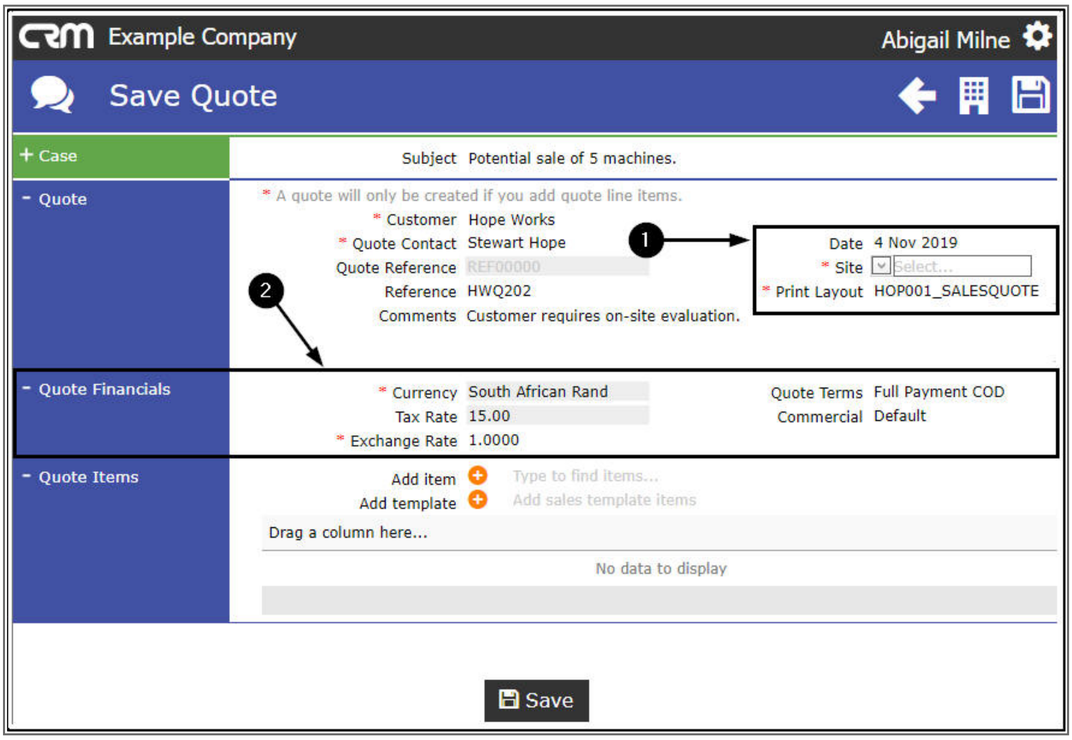
Exchange Rate: This will auto populate with the exchange rate set up on the customer.

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.

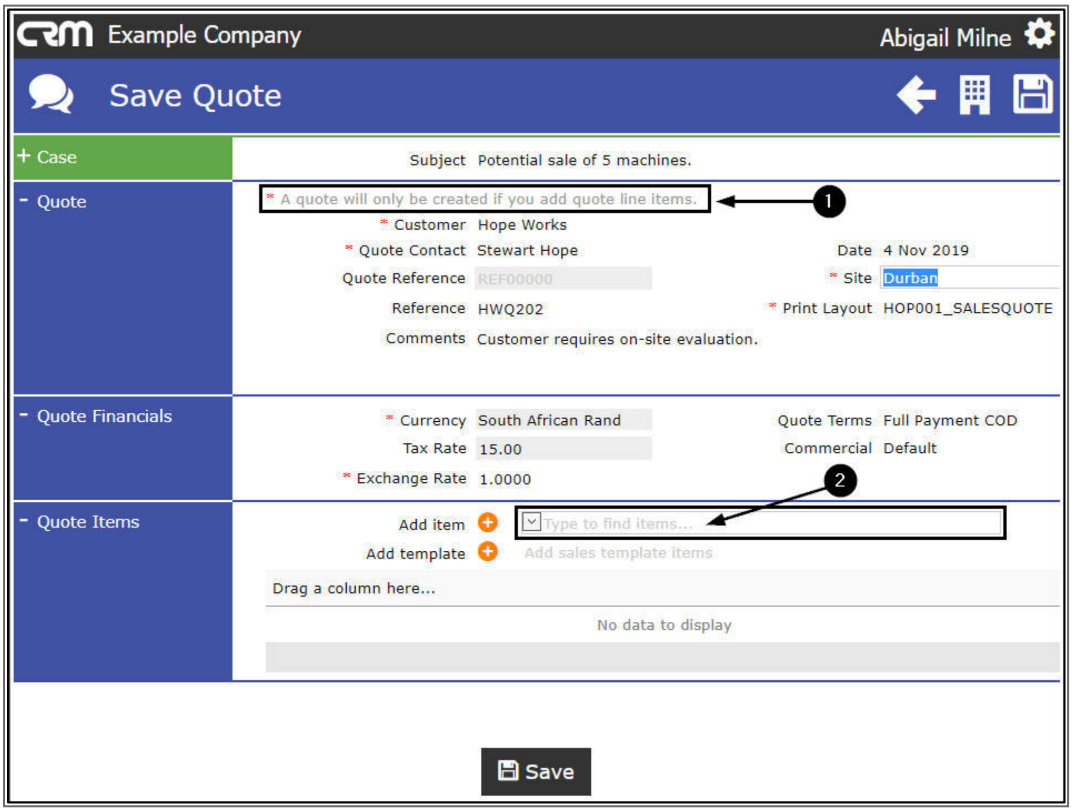


ADD QUOTE ITEMS

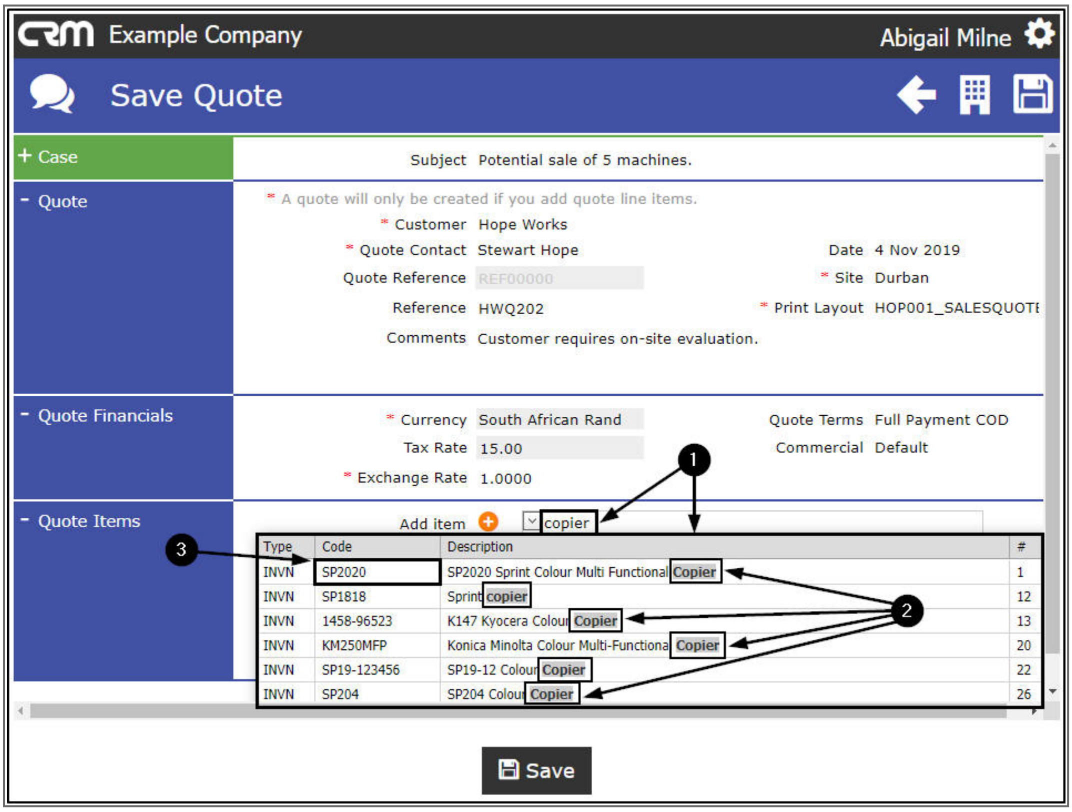
You now have the ability to add single items to a quote.

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.

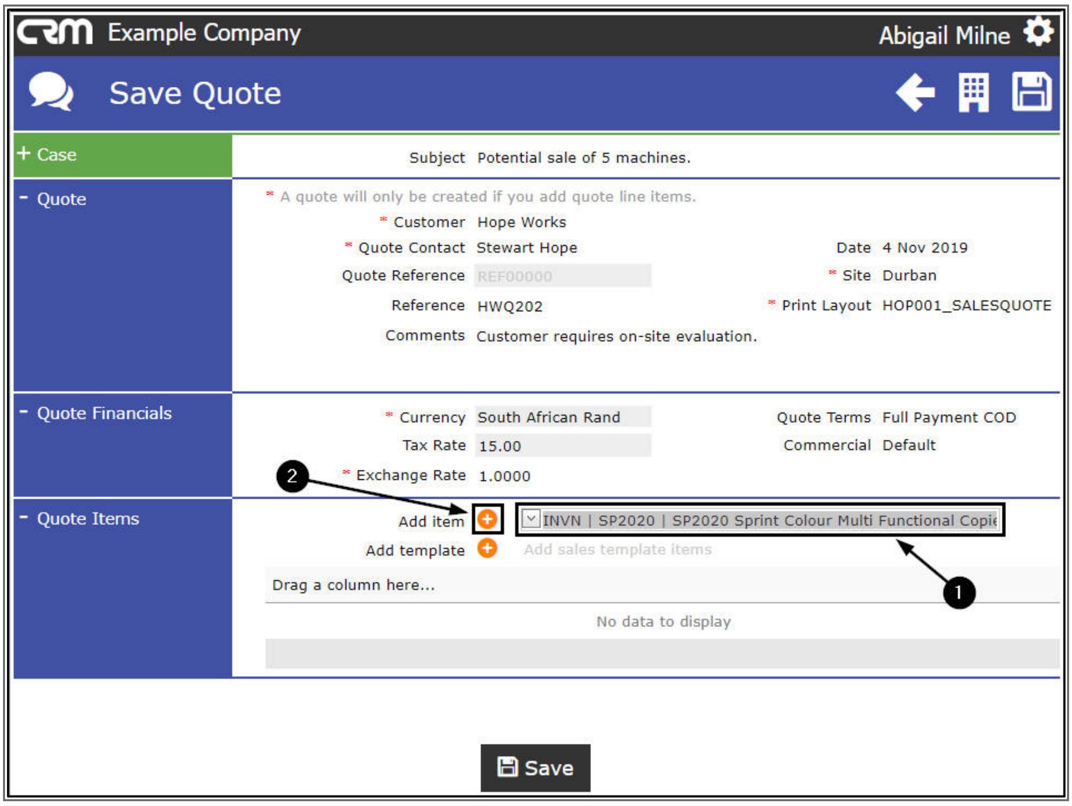


1. As you start typing in the field, a **Type**, **Code** and **Description** list of all items on the system, will be displayed.
2. The system will **filter** for the item that you are searching for.
3. Select the applicable **item** from this list.



1. The selected item code and description will populate the **Add** item field.

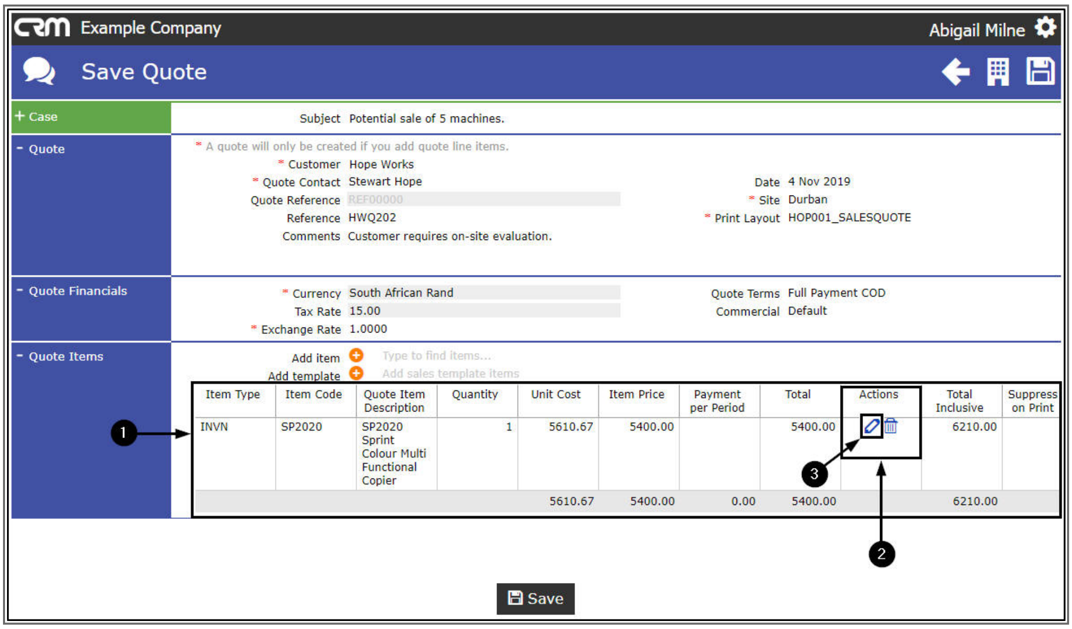
2. Click on the **plus[+]** button.



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.

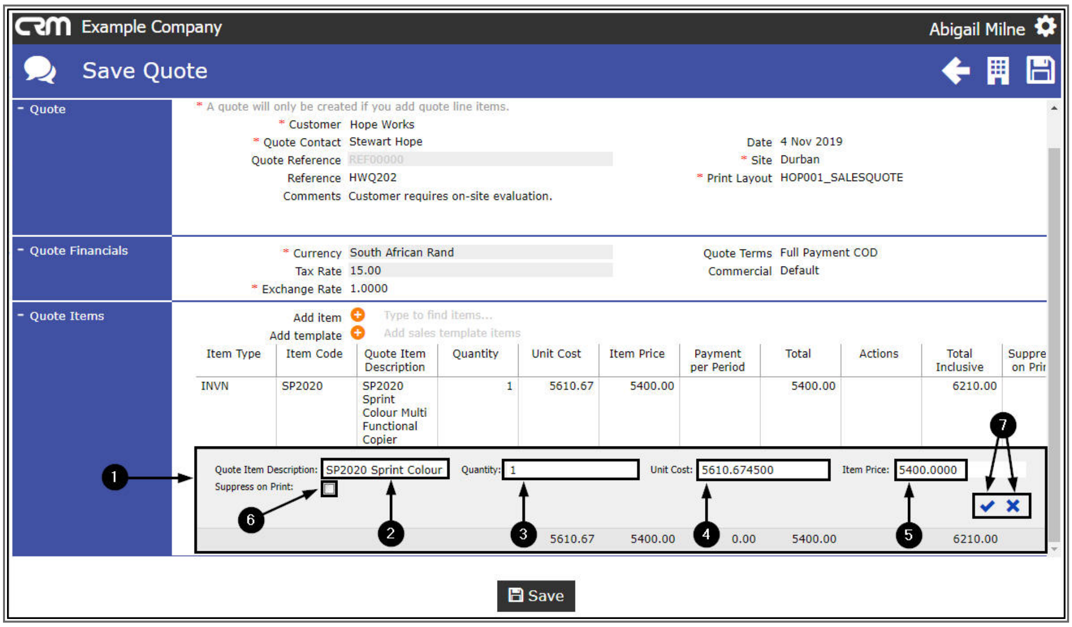


1. An **edit item** frame will be displayed.

   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

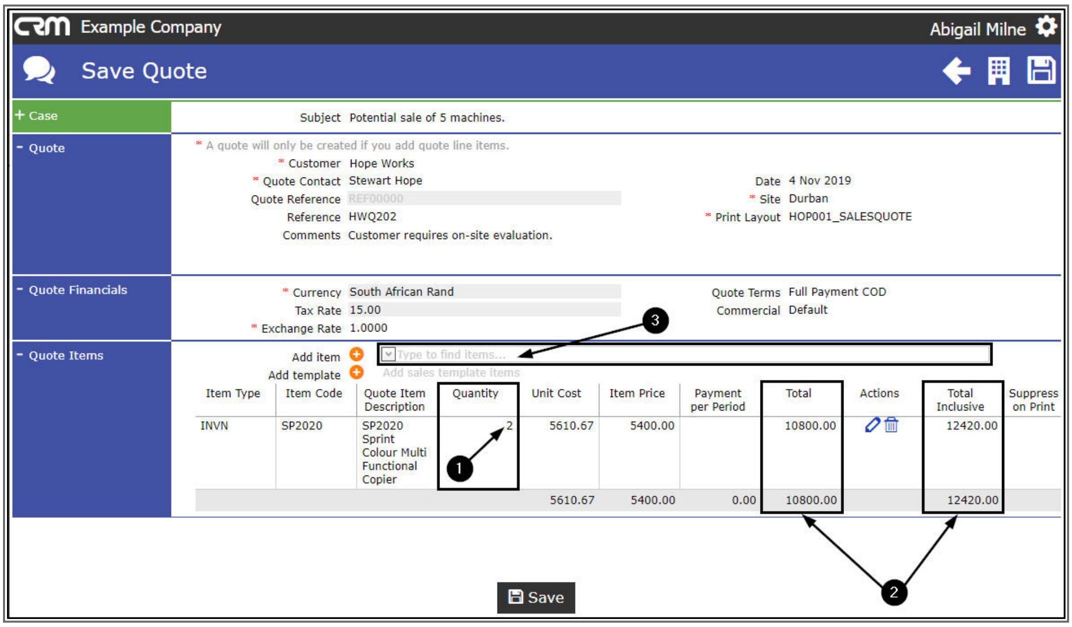
7. Click on the **Apply Changes** icon **[ ]** to save your changes or the the **Cancel changes** icon **[x]** to cancel the changes, as required.



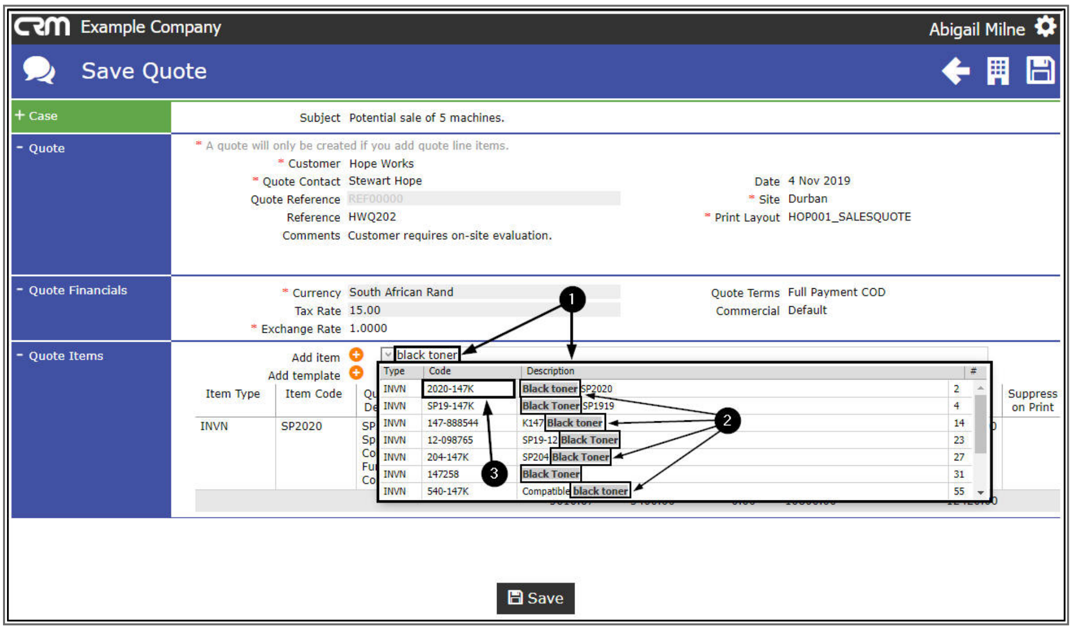
1. In this example, the **Quantity** has been updated to **2**.
2. The **Total** and **Total Inclusive** columns will update accordingly.

LINK ADDITIONAL QUOTE ITEMS

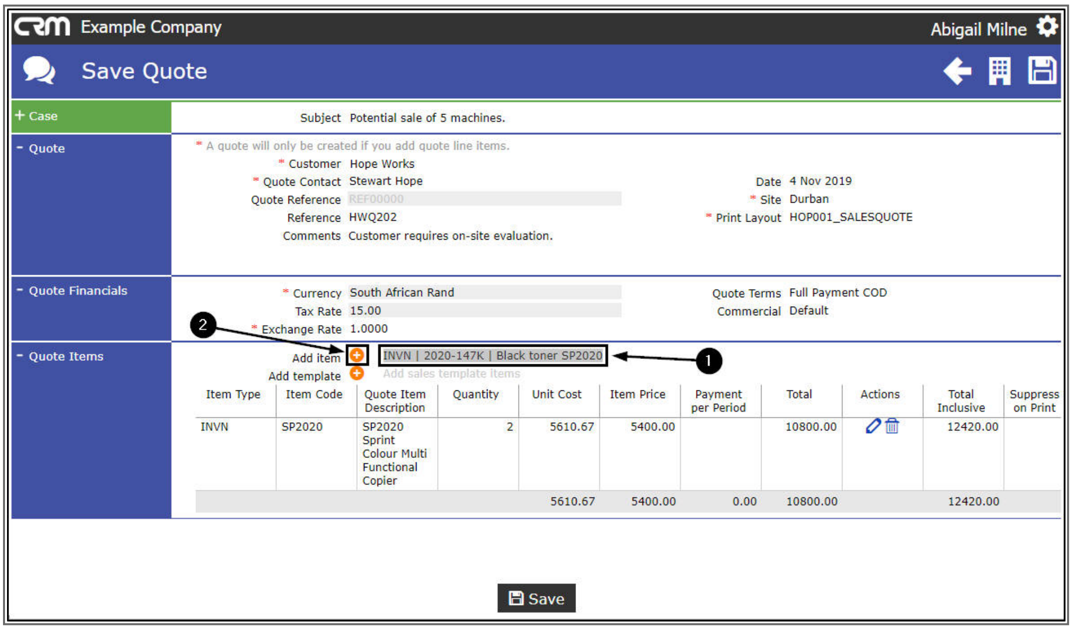
3. In the **Add item** field, start typing the **code** or **description** of the next item that you wish to add to the quote.



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.



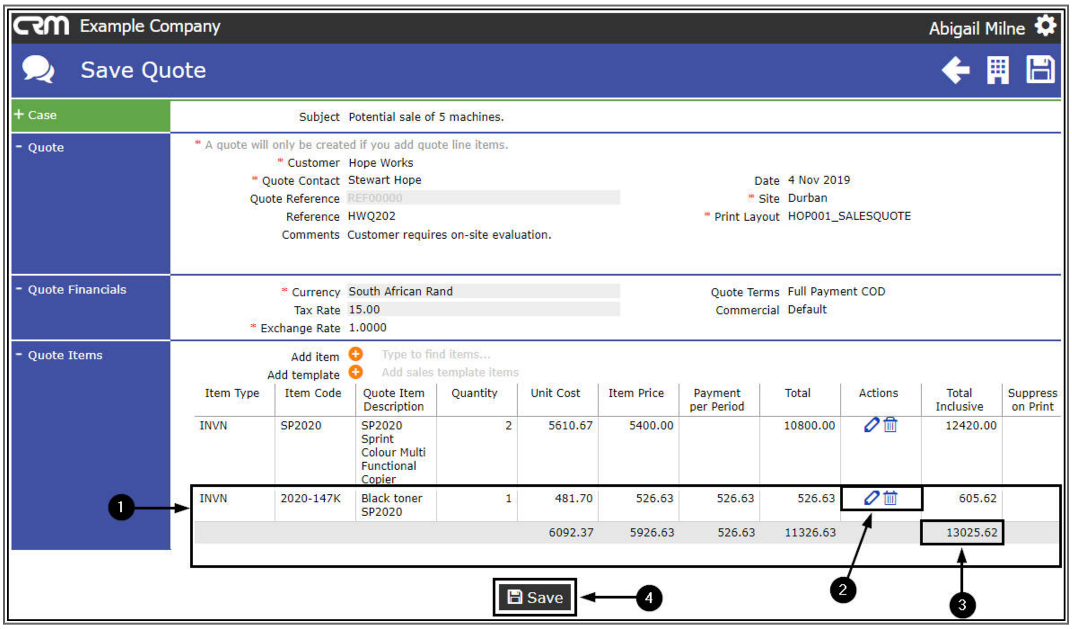
1. The additional item code and description will populate the **Add** item field.
2. Click on the **plus [+]** button.



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**.

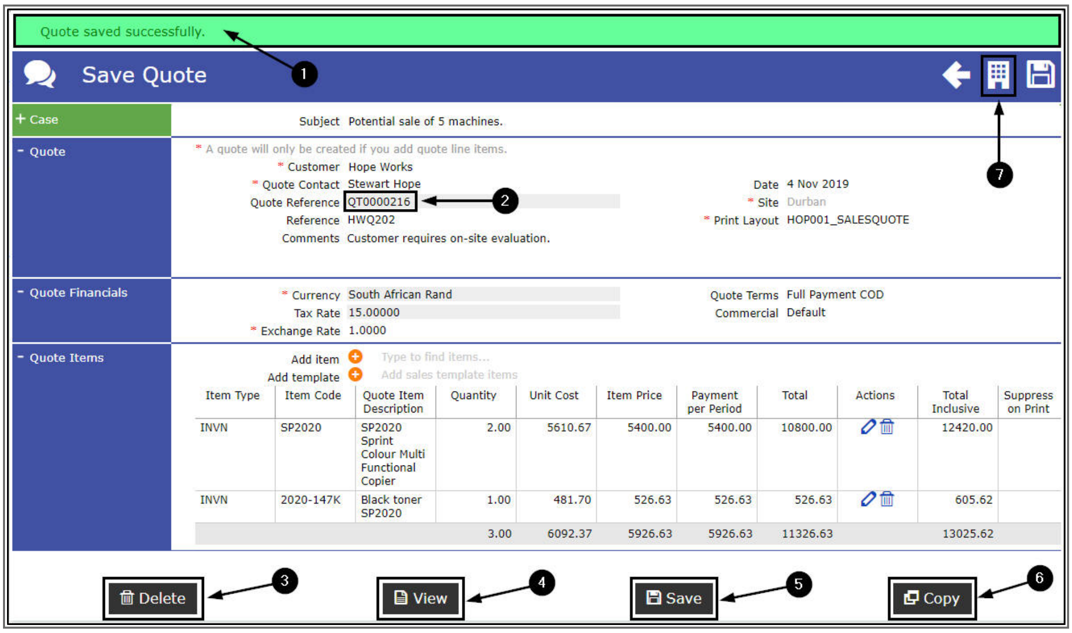


1. A message box will appear at the top of the page informing you that:
    - **Quote saved successfully**
2. The system will have allocated a Quote Reference Number.

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).



View New Quote from the Customer Dashboard

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

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.

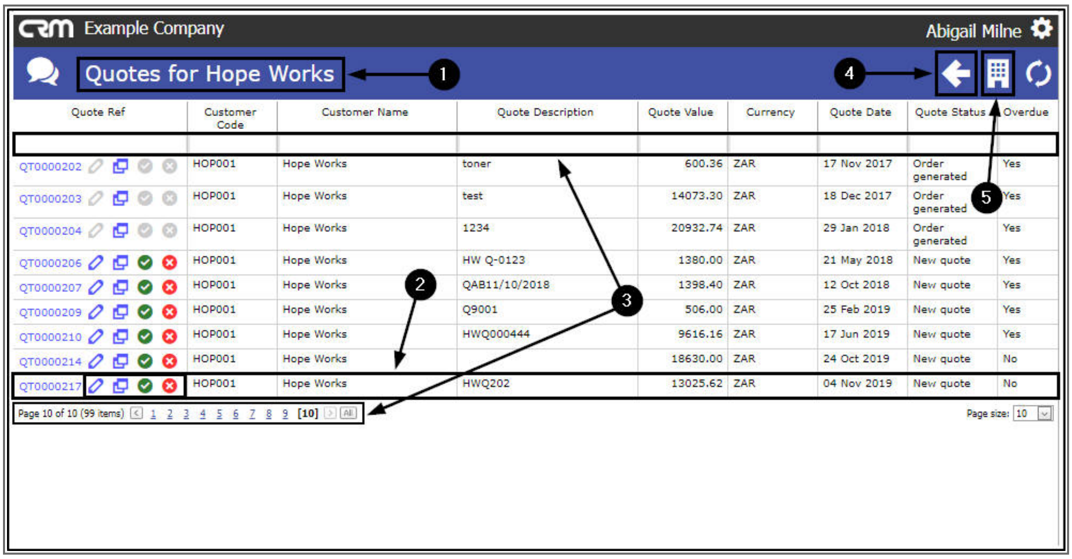
Either

4. Click on **Back**

Or

5. Click on the **Customer icon**

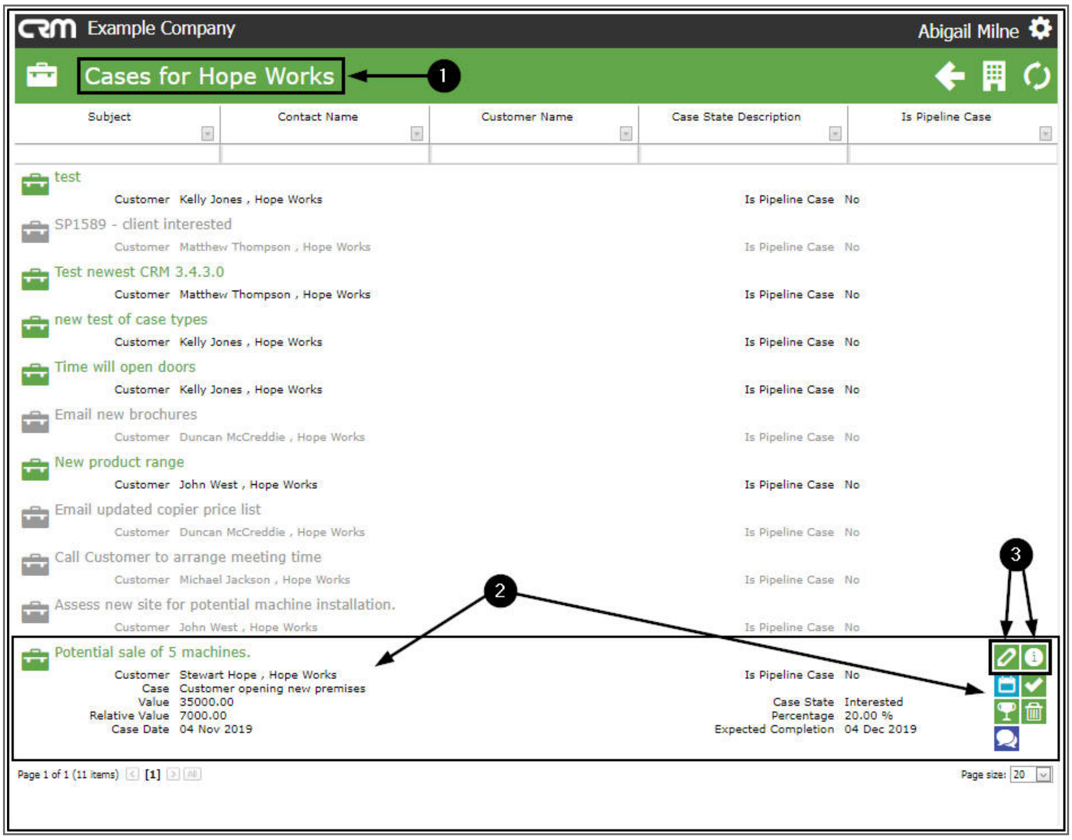
to return to the **Customer Dashboard** (Customer Home page).



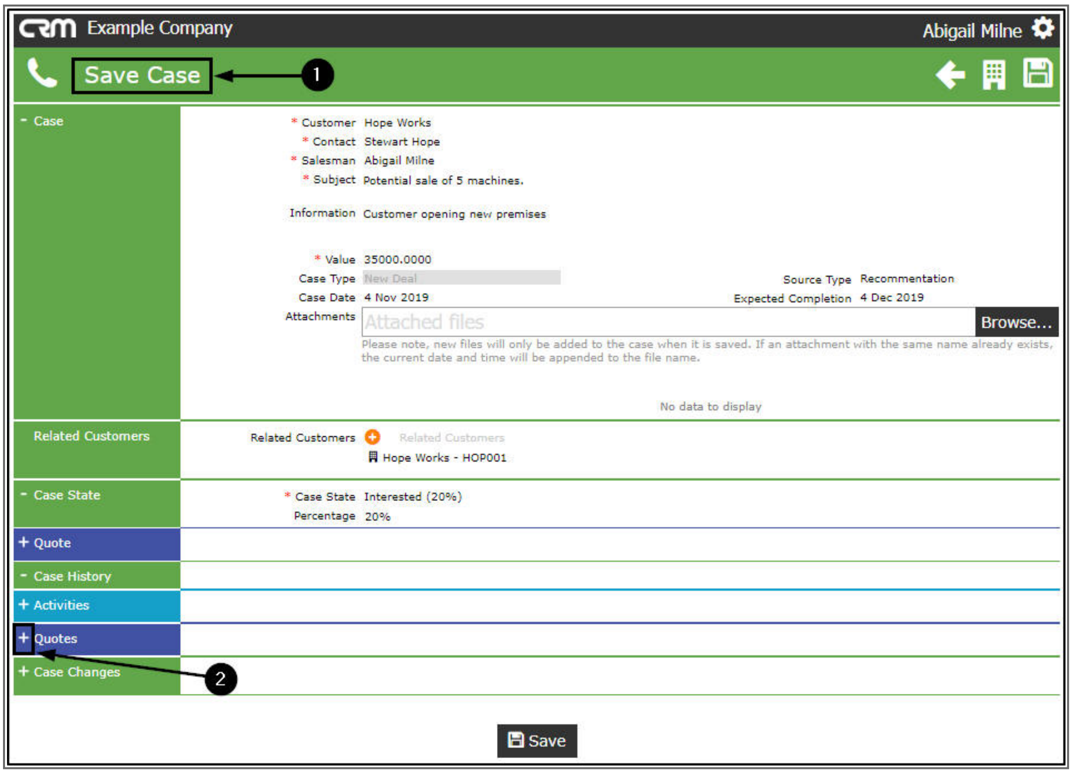
View the linked Quote via the Cases tile

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

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.



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.

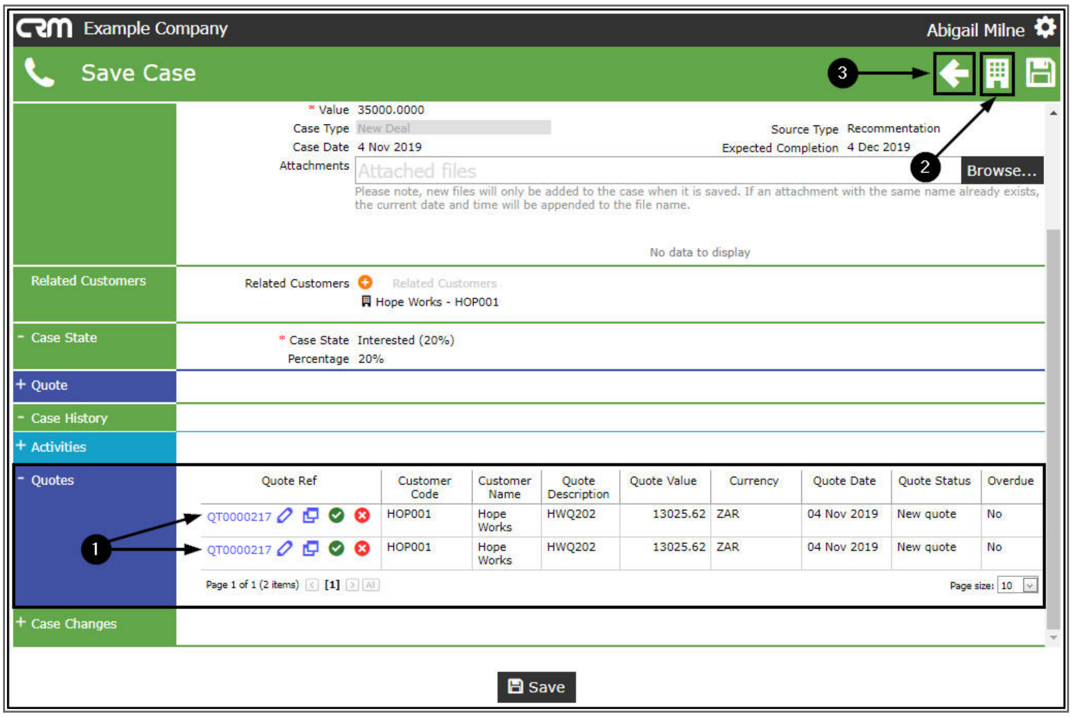
   Either

2. Click on **Back**

   Or

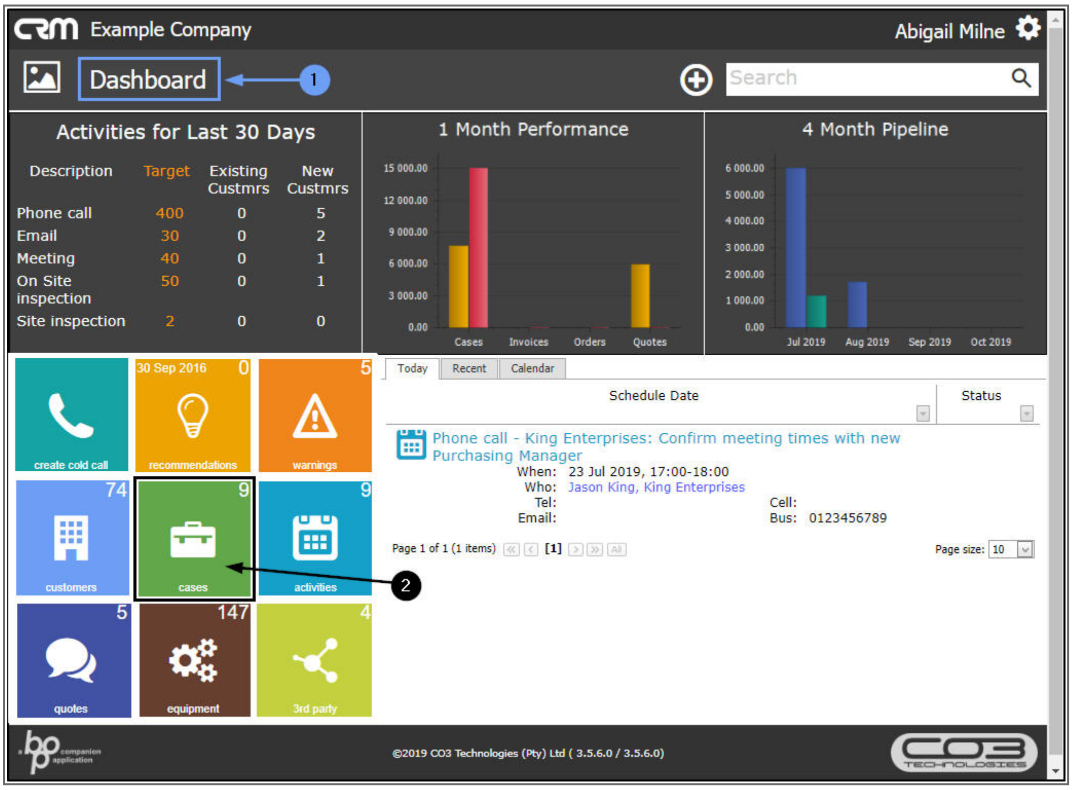
2. Click on the **Customers** icon

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



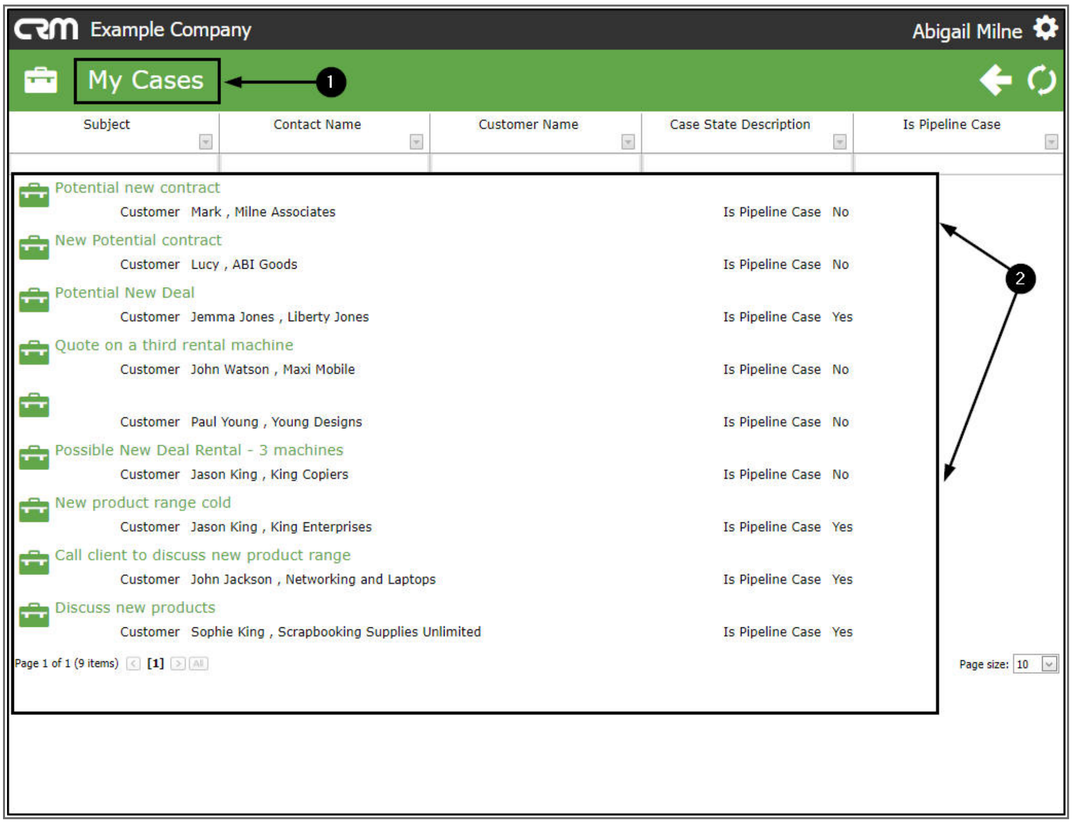
VIEW THE ENTIRE CASE LIST FROM THE DASHBOARD (HOME PAGE)

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

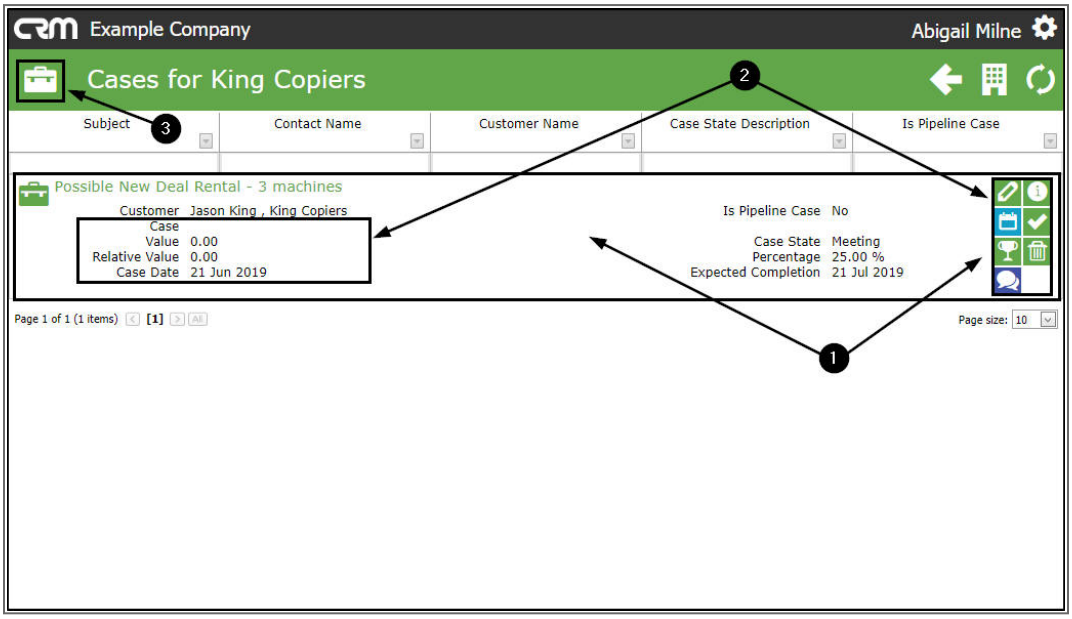


THE MY CASES LISTING SCREEN

- The **My Cases** listing page will be displayed.
- Here you can view the <u>entire</u> case list for <u>all</u> 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).



Related Topics

- CRM Basics: Cases.

CRM.002.004