

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

## CRM CUSTOMERS

### SALES ORDERS

You can view, download, print and/or email Sales Orders for your Customers in CRM.

However, Sales Orders are **created** in BPO only.

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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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### NAVIGATE TO CUSTOMER DASHBOARD (CUSTOMER HOME PAGE)

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To access your customer-specific list of Sales Orders, you will first need to navigate to the Customer Dashboard (Customer Home page).

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



1. The **Customers** listing page will open.

## SEARCH FOR AND SELECT THE CUSTOMER

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 a CRM interface for 'Example Company' with user 'Abigail Milne'. The 'Customers' tab is active. A search bar is present with the placeholder 'Type Customer name search filter here...'. Below is a table of customer records. At the bottom, there is a pagination control showing 'Page 4 of 8 (74 items)' and a 'Page size' dropdown set to 10.

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

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

The screenshot shows a CRM dashboard for 'Example Company' with user 'Abigail Milne'. The main focus is on the customer 'Hope Works - HOP001'. The interface includes a navigation menu on the left with icons for 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The 'orders' icon is highlighted with a red box and a '2' in a circle. At the top, a search bar and a 'Hope Works' tab are visible, with a '1' in a circle pointing to the tab. The dashboard features three main charts: 'Activities for Last 30 Days' (table), '1 Month Performance' (bar chart), and '4 Month Pipeline' (bar chart). Below these is a detailed customer profile for 'Hope Works' with fields for Trading Name, Registered Name, Description, VAT No, Registration, Rank, Website, and Phone. A '12 Months Sales History' bar chart is also present, showing 'Contract Income' and 'Sales Revenue' from January 2018 to January 2019. The bottom of the screen contains the CO3 Technologies logo and copyright information.

## THE ORDERS FOR [SELECTED CUSTOMER] LISTING PAGE

1. The **Orders for** [selected customer] listing page will open.
2. All of the Orders linked to this customer will be displayed (even ones where you are not the Salesman).
3. The **Order Status** and **Order Status Description** can be viewed (e.g. I = Invoiced Order, N = New Order).

- Each **Order Value** can be viewed.
- The **Currency** of each Order can be viewed.

Order No	Order Status	Order Status Desc	Order Value	Currency
OR0000238	I	Invoiced order	14073.30	ZAR
OR0000239	N	New order	517.50	ZAR
OR0000240	I	Invoiced order	6210.00	ZAR
OR0000242	I	Invoiced order	6210.00	ZAR
OR0000243	I	Invoiced order	6210.00	ZAR
OR0000244	I	Invoiced order	3220.00	ZAR
OR0000246	N	New order	2686.98	ZAR
OR0000247	I	Invoiced order	1005.10	ZAR
OR0000248	I	Invoiced order	805.00	ZAR
OR0000249	I	Invoiced order	6210.00	ZAR

## SEARCH FOR AND SELECT AN ORDER

- You can use the **Page Reference field** or the
- Filter Row** or the
- Create Filter Row** functionality to search for a particular Order.

## VIEW, DOWNLOAD OR PRINT CUSTOMER ORDER

- In the **Order No.** column, click on the blue number of the Order that you wish to **View**, **Print** or **Download**.

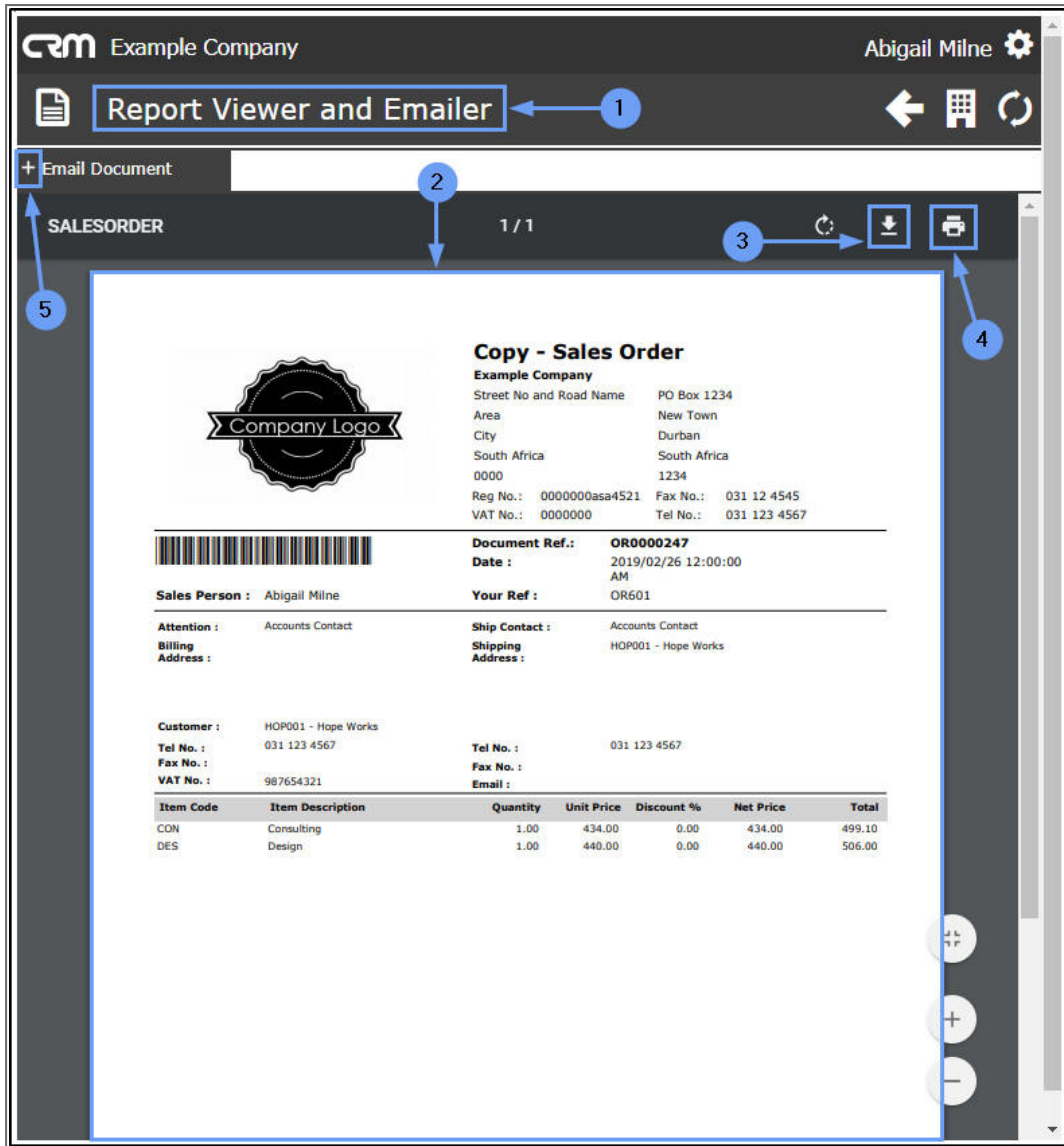
The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main heading is 'Orders for Hope Works'. Below it is a table with columns: Order No, Order Status, Order Status Desc, Order Value, and Currency. The table contains 14 rows of order data. Annotations are as follows: 1 points to the pagination controls at the bottom of the table; 2 points to the 'Orders for Hope Works' header; 3 points to the 'Create Filter' button below the table; 4 points to the order number 'OR0000247' in the table.

Order No	Order Status	Order Status Desc	Order Value	Currency
OR0000238	I	Invoiced order	14073.30	ZAR
OR0000239	N	New order	517.50	ZAR
OR0000240	I	Invoiced order	6210.00	ZAR
OR0000242	I	Invoiced order	6210.00	ZAR
OR0000243	I	Invoiced order	6210.00	ZAR
OR0000244	I	Invoiced order	3220.00	ZAR
OR0000246	N	New order	2686.98	ZAR
OR0000247	I	Invoiced order	1005.10	ZAR
OR0000248	I	Invoiced order	805.00	ZAR
OR0000249	I	Invoiced order	6210.00	ZAR

1. The **Report Viewer and Emailer** page will open.
2. The selected Order will be displayed.
3. Here you can **Download** the Order and/or
4. **Print** the Order.

## EMAIL ORDER

5. Click on the expand icon [ + ] on the **Email Document** tab.



1. The **Email Document** frame will be expanded.

Check and/or add the following details, as necessary:

2. **To:** Either click in the field and select the preferred contact from the list, or type in the contact email address.
3. **Cc:** Here, you can add other email recipients, if applicable.
  - Either click in the field and select customer contacts from the list, or type in additional addresses as noted above

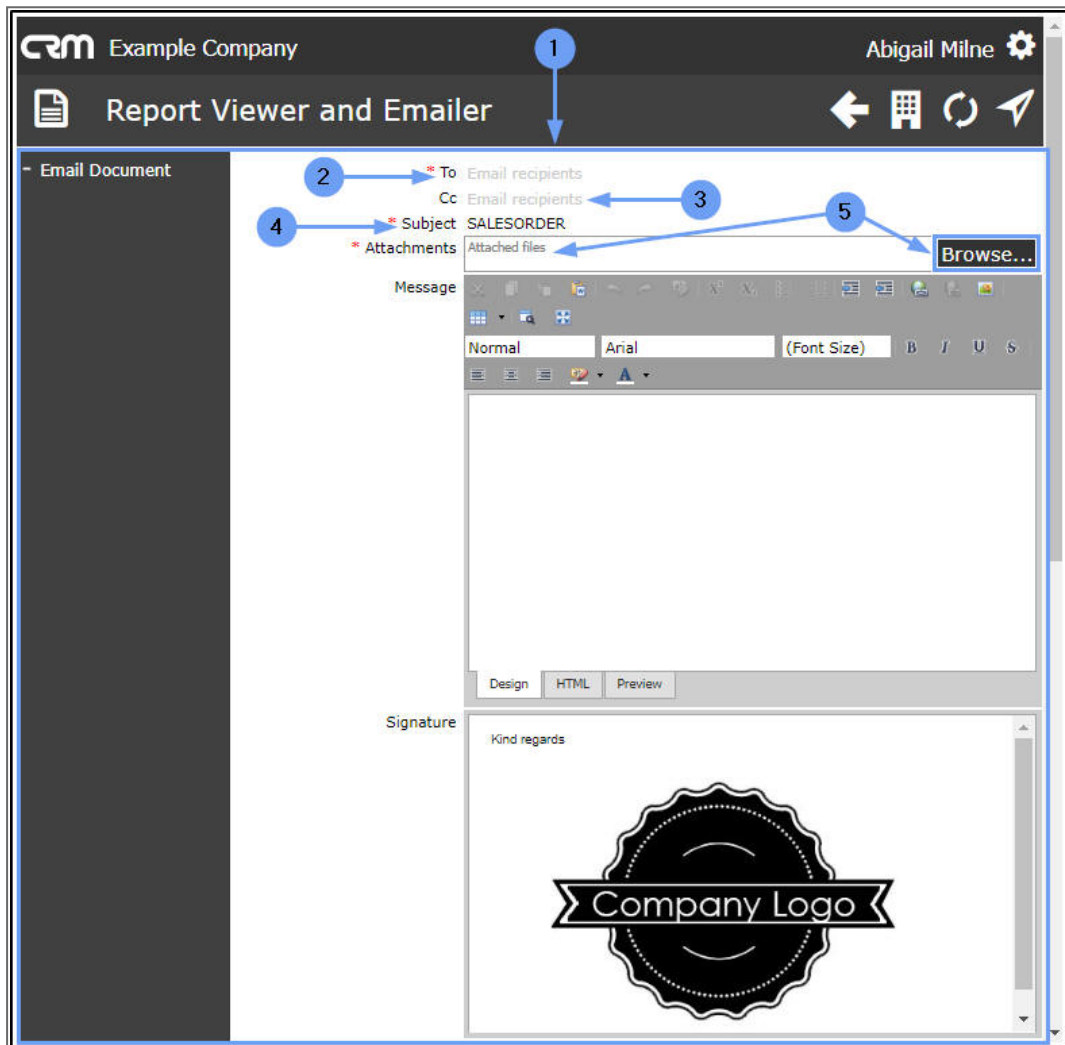
(separated by a semi-colon and a space).

4. **Subject:** This field will auto populate with **Sales Order** but you can edit this, if required.

## ADD AN ATTACHMENT

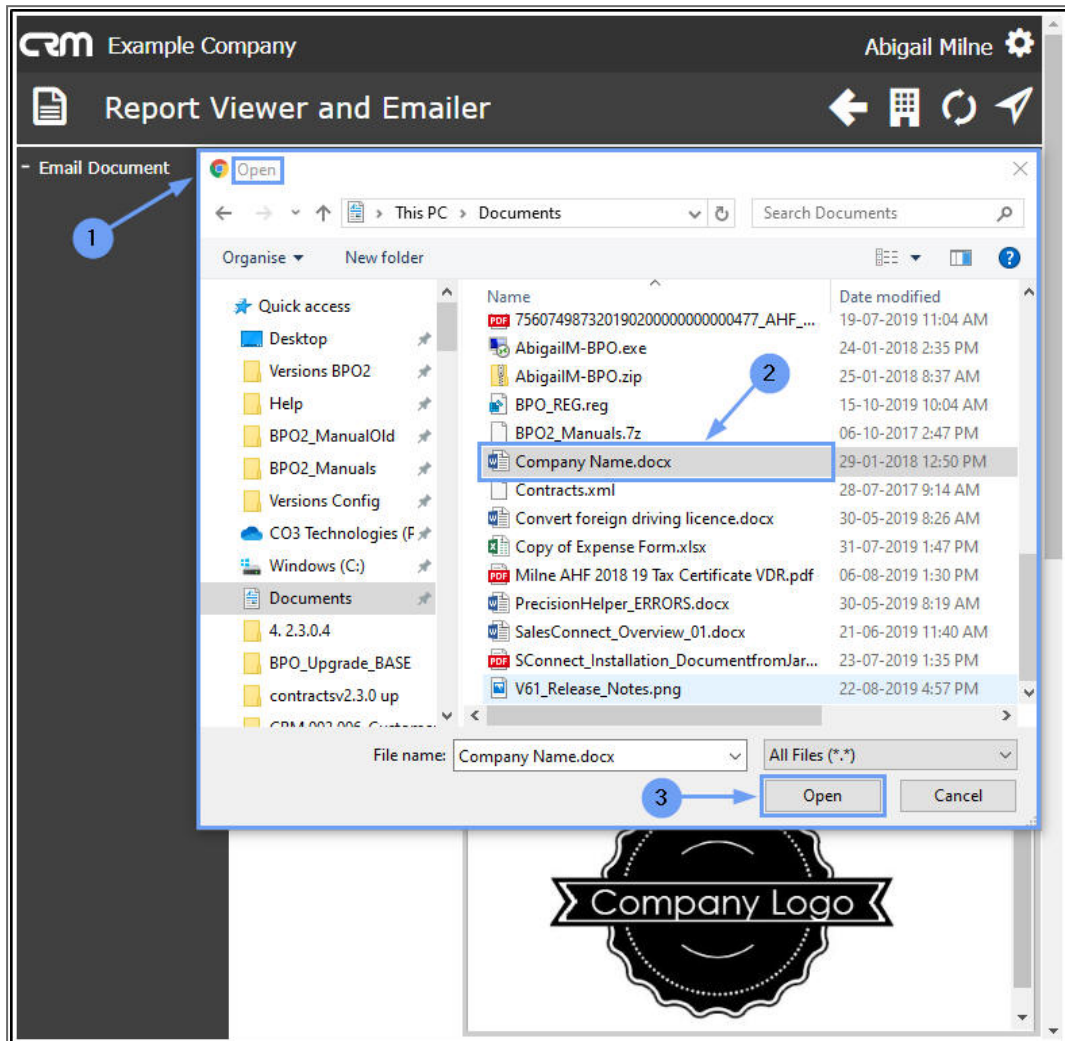
You can add other documents, as attachments, if required.

5. **Attachments:** Click on **Browse**.

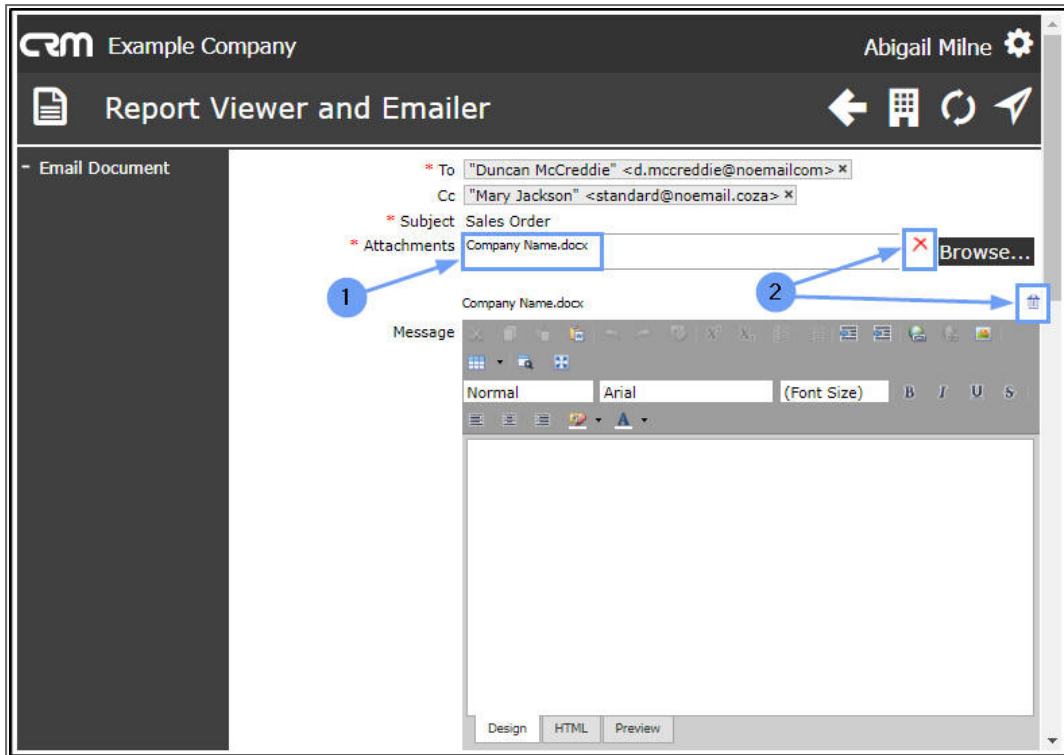




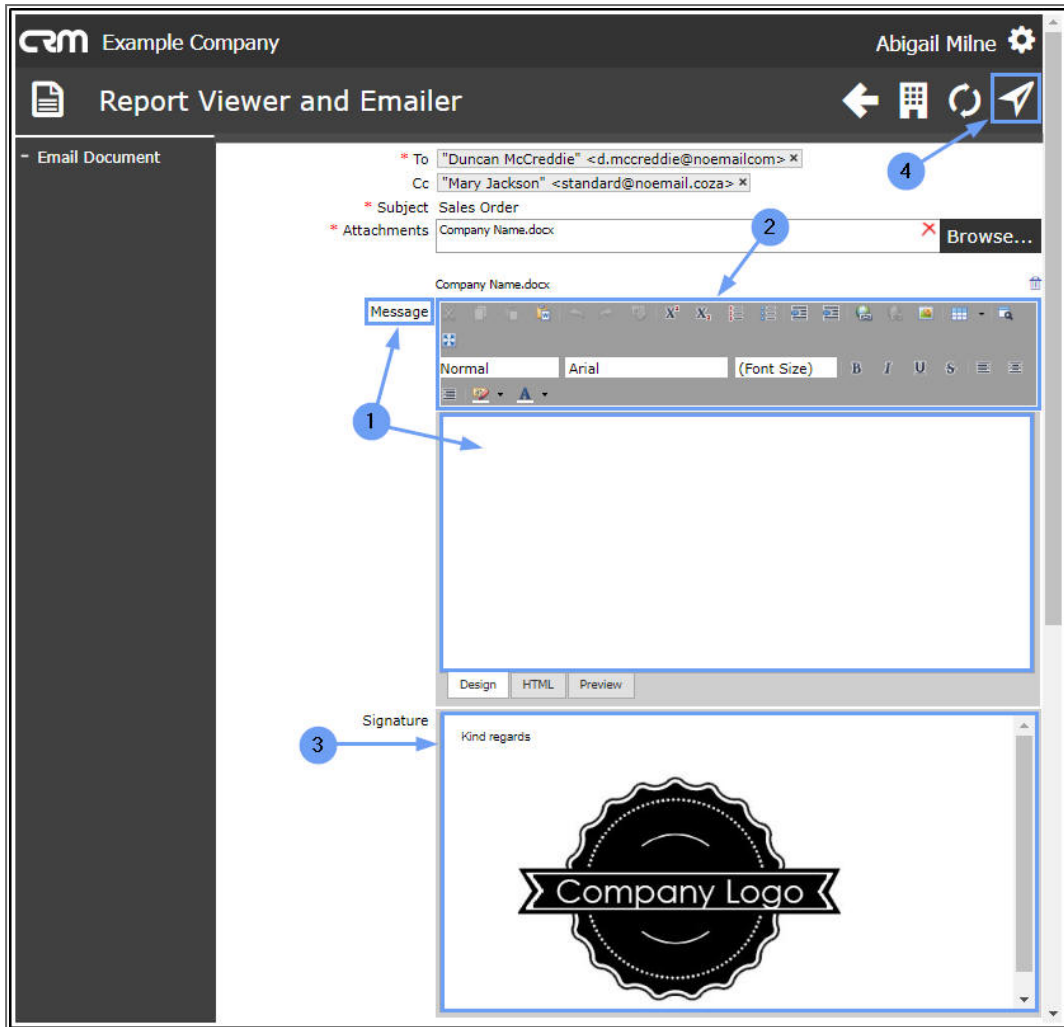
1. The **Open** screen will pop up.
2. Search for and select the file you wish to link to this Order.
3. Click on **Open** .



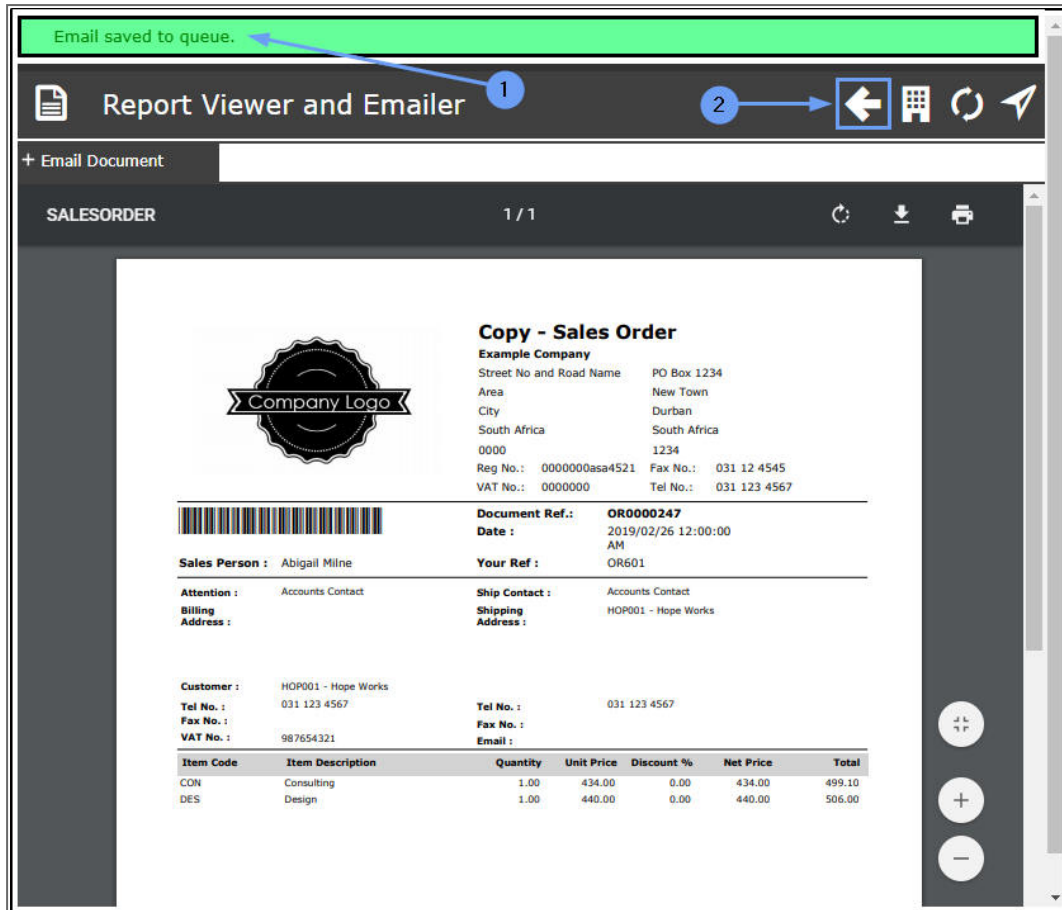
1. The file will now be attached to the email.
2. You can delete the attachment if required by clicking on either of the **Delete** icons.



1. Type a relevant message in the **Message** body.
2. The **Message tool bar** can be used to customise your email message.
3. **Signature:** If you have a **Signature configured in CRM** - your Signature will pull through here, otherwise the **Company default CRM mail signature** will pull through.
4. Click on the **Send** icon.



1. A **message box** will pop up informing you of the status of the sent email.
2. Click on **Back** .



1. You will return to the **Orders for [selected customer]** listing page.
2. Select another Order to View, Download, Print or Email, if required.
3. Click on the **Customers** icon to return to the **Customer Dashboard** (Customer Home page).
4. Click on the **CRM** icon to return to the **Dashboard** (Home page).

Example Company

Abigail Milne

Orders for Hope Works

Order No	Order Status	Order Status Desc	Order Value	Currency
<a href="#">OR0000238</a>	I	Invoiced order	14073.30	ZAR
<a href="#">OR0000239</a>	N	New order	517.50	ZAR
<a href="#">OR0000240</a>	I	Invoiced order	6210.00	ZAR
<a href="#">OR0000242</a>	I	Invoiced order	6210.00	ZAR
<a href="#">OR0000243</a>	I	Invoiced order	6210.00	ZAR
<a href="#">OR0000244</a>	I	Invoiced order	3220.00	ZAR
<a href="#">OR0000246</a>	N	New order	2686.98	ZAR
<a href="#">OR0000247</a>	I	Invoiced order	1005.10	ZAR
<a href="#">OR0000248</a>	I	Invoiced order	805.00	ZAR
<a href="#">OR0000249</a>	I	Invoiced order	6210.00	ZAR

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[1](#) [2](#) [3](#) ... [8](#) [9](#) [10](#) [11](#) [12](#) [13](#) **[14]** [15](#)
Page size:

[Create Filter](#)

CRM.002.007

