

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

## CRM CUSTOMERS

### CUSTOMER ACTIONS BUTTONS

You can access and add more customer information to **CRM** using the customer **Action buttons**, available in both the **Customers** listing screen and the **Customer Dashboard** (Customer Home page).

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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 THE CUSTOMERS LISTING PAGE:**

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1. In the **Dashboard** (Home page),
2. Click on the **Customers** tile.
3. **Note:** The number in the top left of the tile indicates how many customers that you are linked to.

CRM Example Company Abigail Milne

Dashboard Search

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 Performance

4 Month Pipeline

Today Recent Calendar

Schedule Date Status

No data to display

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

## **VIEW ACTIVE OR RELEASED CUSTOMER ACTION BUTTONS**

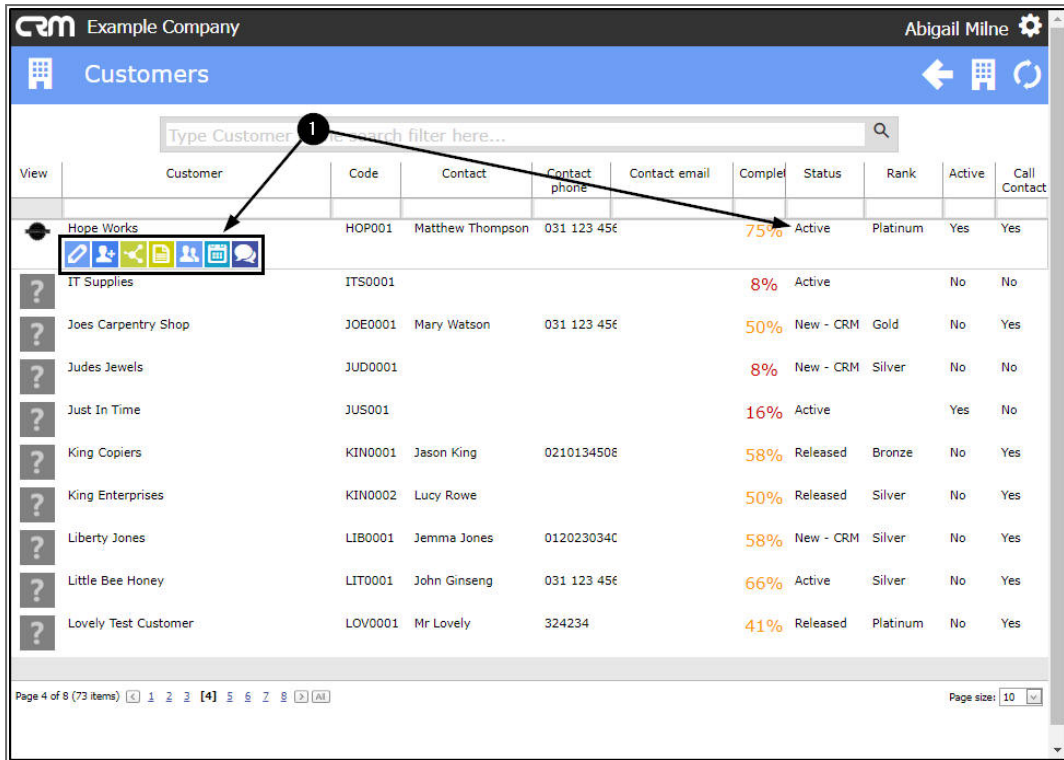
2. **Hover anywhere** in the row of a selected customer.
3. You will note that the customer status in this example is **Active**. (Active and Released customers will display the same Action buttons.)

View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
	Hope Works	HOP001	Matthew Thompson	031 123 456		75%	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%	Released	Silver	No	Yes
?	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	New - CRM	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

Page 4 of 8 (73 items) [1] [2] [3] [4] [5] [6] [7] [8] [A] Page size: 10

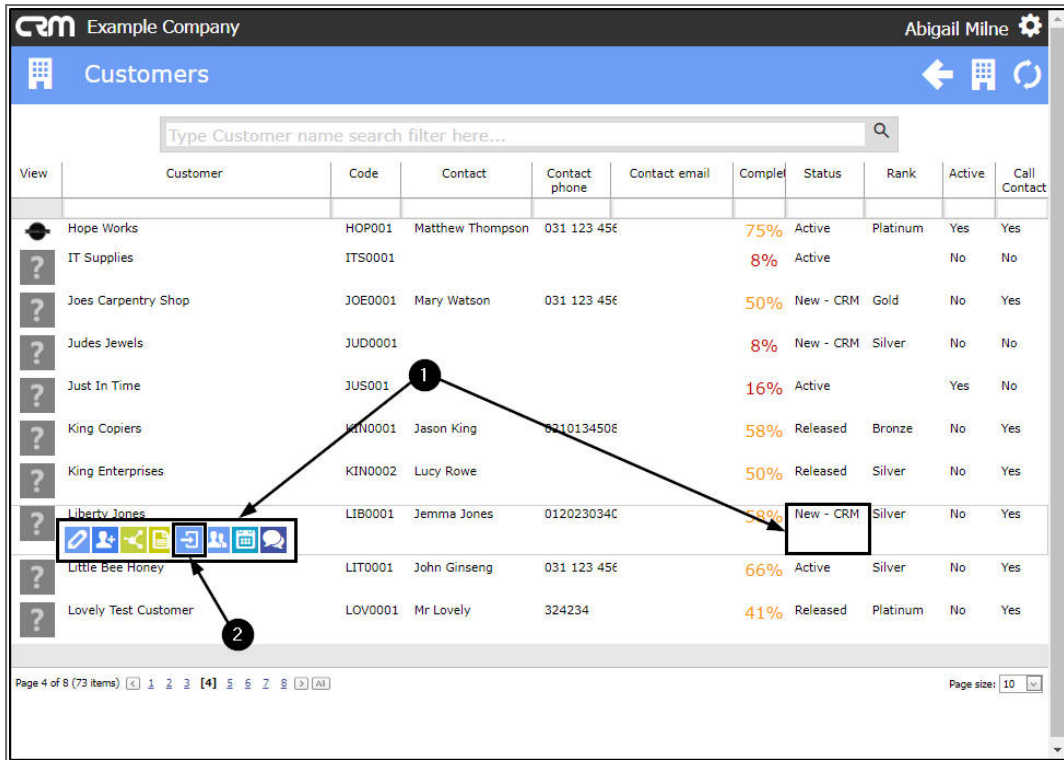
1. The Active customer **Action** buttons will be displayed:

- **Edit Customer**
- **Add Contact**
- **Add Third Party**
- **Add Note**
- **Maintain Customer Salesmen**
- **New Activity**
- **New Quote**



## VIEW NEW-CRM CUSTOMER ACTION BUTTONS

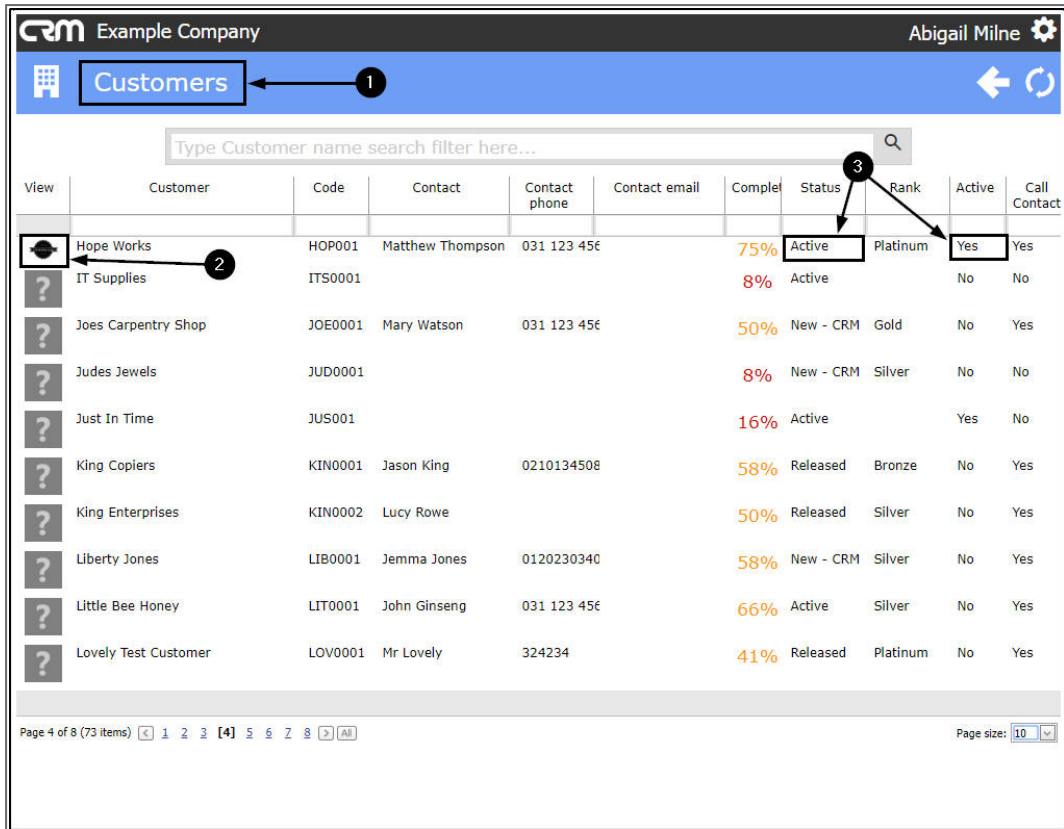
1. **Hover anywhere** in the row of a **New - CRM** customer.
2. With New-CRM customers, the Action buttons displayed will include the **Release Customer** button.



You can either view and add customer information directly from this **Customers** page or you can navigate to the selected **Customer Dashboard** to view the same buttons.

## **NAVIGATE TO THE CUSTOMERS DASHBOARD (CUSTOMER HOME PAGE) PAGE:**

1. In the **Customers** listing page,
2. Select a specific customer by clicking on the icon next to that customer name, in the **View** column.
3. You will note that the customer selected in this example (Hope Works) is an **Active** customer - this will affect the Action button options that will be available.



1. The **Customer Dashboard** (Customer Home page) page will open.

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

2. This will **hide** the customer dashboard panel.

Select the 'Hide dashboard panel on customer page' setting

3. Click on the **Settings** icon.

**CRM Example Company**

**Hope Works** Search

### 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 Performance

Bar chart showing performance for Cases, Invoices, Orders, and Quotes.

### 4 Month Pipeline

Bar chart showing pipeline for Sep 2019, Oct 2019, Nov 2019, and Dec 2019.

- 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 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

Bar chart showing Contract Income and Sales Revenue from January 2018 to January 2019.

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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' with user 'Abigail Milne'. The main view is for customer 'Hope Works - HOP001'. A table shows 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 inspection	50	0	0
Site inspection	2	0	0

The 'Options' panel on the right contains the following settings:

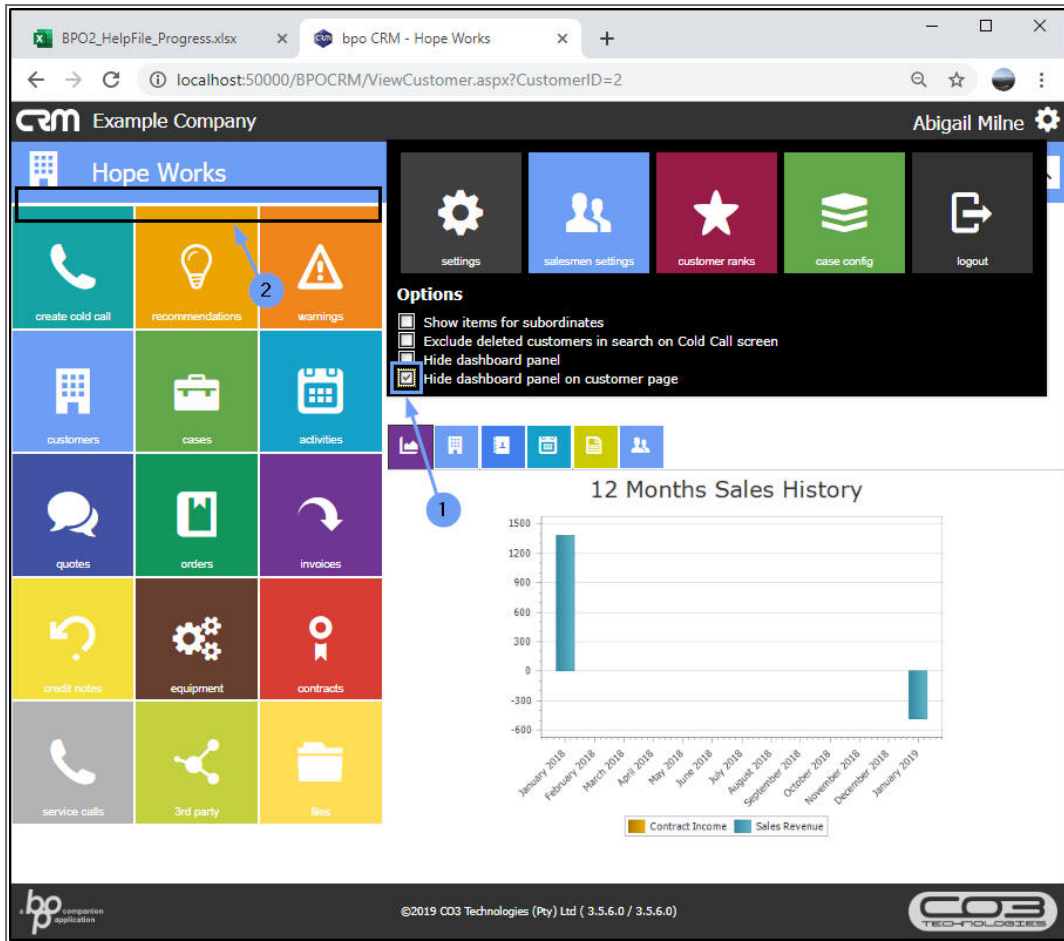
- Show items for subordinates
- Exclude deleted customers in search on Cold Call screen
- Hide dashboard panel
- Hide dashboard panel on customer page

The '12 Months Sales History' chart shows the following data:

Month	Contract Income	Sales Revenue
January 2018	1300	1300
February 2018	0	0
March 2018	0	0
April 2018	0	0
May 2018	0	0
June 2018	0	0
July 2018	0	0
August 2018	0	0
September 2018	0	0
October 2018	0	0
November 2018	0	0
December 2018	0	0
January 2019	0	-400

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





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

The screenshot displays a CRM interface for 'Example Company' with user 'Abigail Milne'. The main view is for customer 'Hope Works - HOP001'. On the left, a grid of 18 action buttons is visible, including 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The right side shows customer details: Trading Name 'Hope Works' (91%), Registered Name 'Hope Works (Pty) Lts', VAT No '987654321', Registration '123456789', Rank 'Platinum', Website 'http://www.hopeworks.co.za', and Phone '031 123 4567'. Below this is a '12 Months Sales History' bar chart showing 'Contract Income' (orange) and 'Sales Revenue' (blue) from January 2018 to January 2019. The chart shows a significant revenue spike in January 2018 and a negative revenue spike in January 2019.

## VIEW CUSTOMER INFORMATION: ACTION BUTTONS

1. Hover anywhere over the Customer Information frame to display the **Action buttons.**
  - Edit Customer
  - Add Contact
  - Add Third Party
  - Add Note
  - Maintain Customer Salesman
  - Create Cold Call
  - New Activity
  - New Quote
2. **Hover over** a specific Action button to display that button description:

**Note:** You can single click on the Customer Information frame to keep the Action buttons consistently displayed in this frame.

The screenshot displays a CRM interface for 'Example Company' with user 'Abigail Milne'. The main view is for customer 'Hope Works - HOP001'. The interface includes a left-hand navigation menu with buttons for: create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files. The customer information panel shows details such as Trading Name, Registered Name, VAT No, Registration, Rank, Website, and Phone. A 'New Activity' button is visible in the top right of this panel. Below the information is a '12 Months Sales History' bar chart showing 'Contract Income' (yellow) and 'Sales Revenue' (blue) from January 2018 to January 2019. A circled '1' points to the customer information frame, and a circled '2' points to the 'New Activity' button.

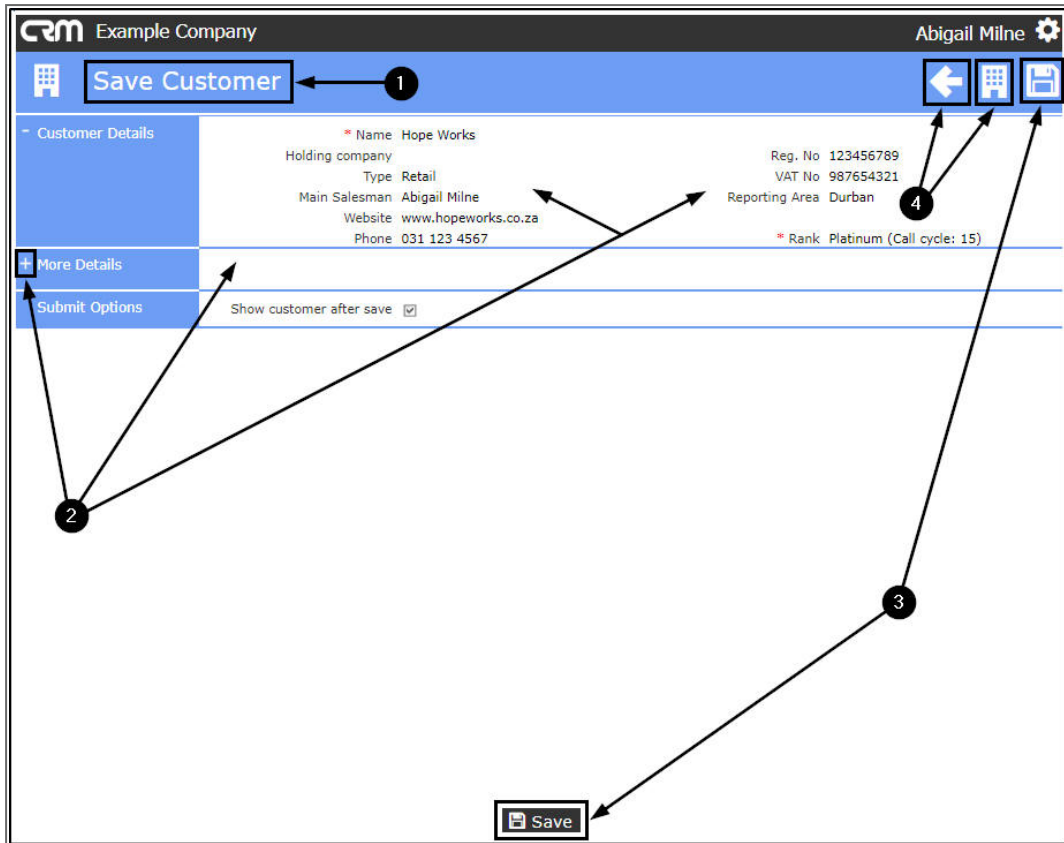
Month	Contract Income	Sales Revenue
January 2018	0	1300
February 2018	0	0
March 2018	0	0
April 2018	0	0
May 2018	0	0
June 2018	0	0
July 2018	0	0
August 2018	0	0
September 2018	0	0
October 2018	0	0
November 2018	0	0
December 2018	0	0
January 2019	0	-100

## EDIT CUSTOMER

- Click on the **Edit Customer** action button.

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main view is for customer 'Hope Works - HOP001'. The interface includes a navigation grid on the left with buttons for 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The customer details section shows: Trading Name: Hope Works, Registered Name: Hope Works (Pty) Lts, Description: Hope Works (Pty) Lts, VAT No: 987654321, Registration: 123456789, Rank: Platinum, Website: http://www.hopeworks.co.za, and Phone: 031 123 4567. A '12 Months Sales History' bar chart shows sales revenue (blue) and contract income (orange) from January 2018 to January 2019. An 'Edit Customer' button is highlighted with a red box and arrows.

1. The **Save Customer** page will open.
2. In this page you can expand the **More Details** frame and add to or edit the customer details, as required.
3. When you are done, you can either **Save** any changes made,
4. Or click on either the **Back** icon or the **Customer** icon to return to the previous/Customer page.

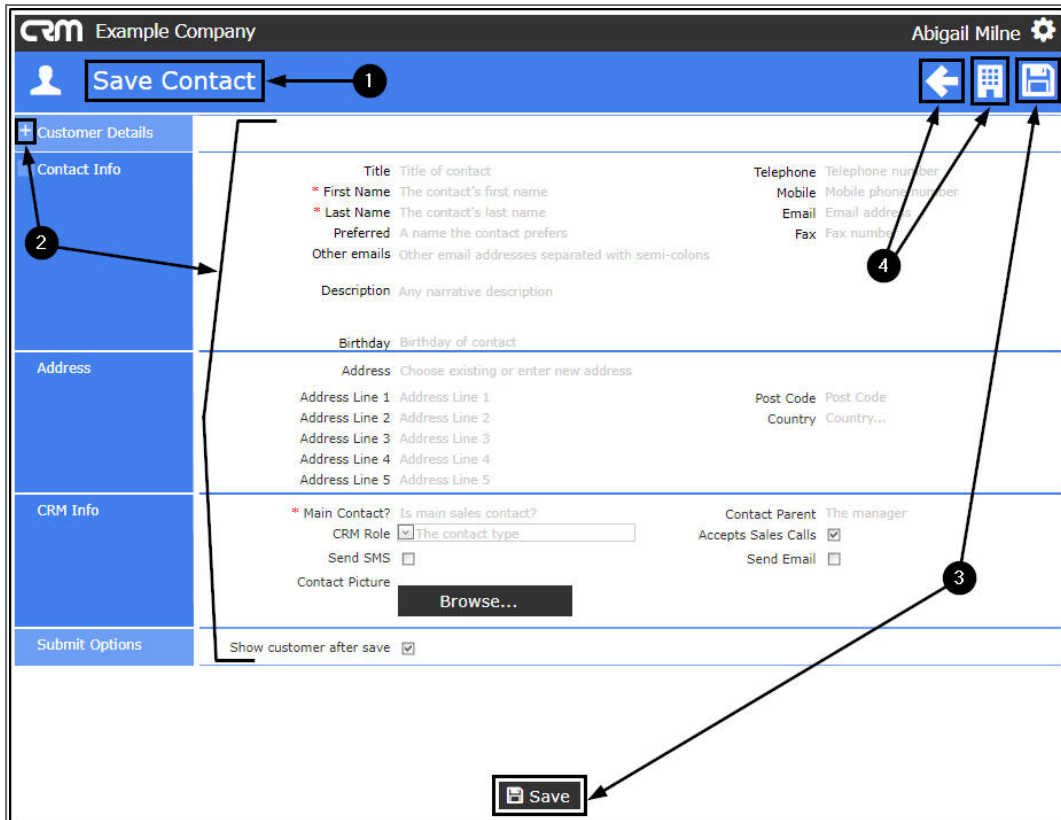


## ADD CONTACT

1. In the **Customer** home page,
2. Click on the **Add Contact** action button.

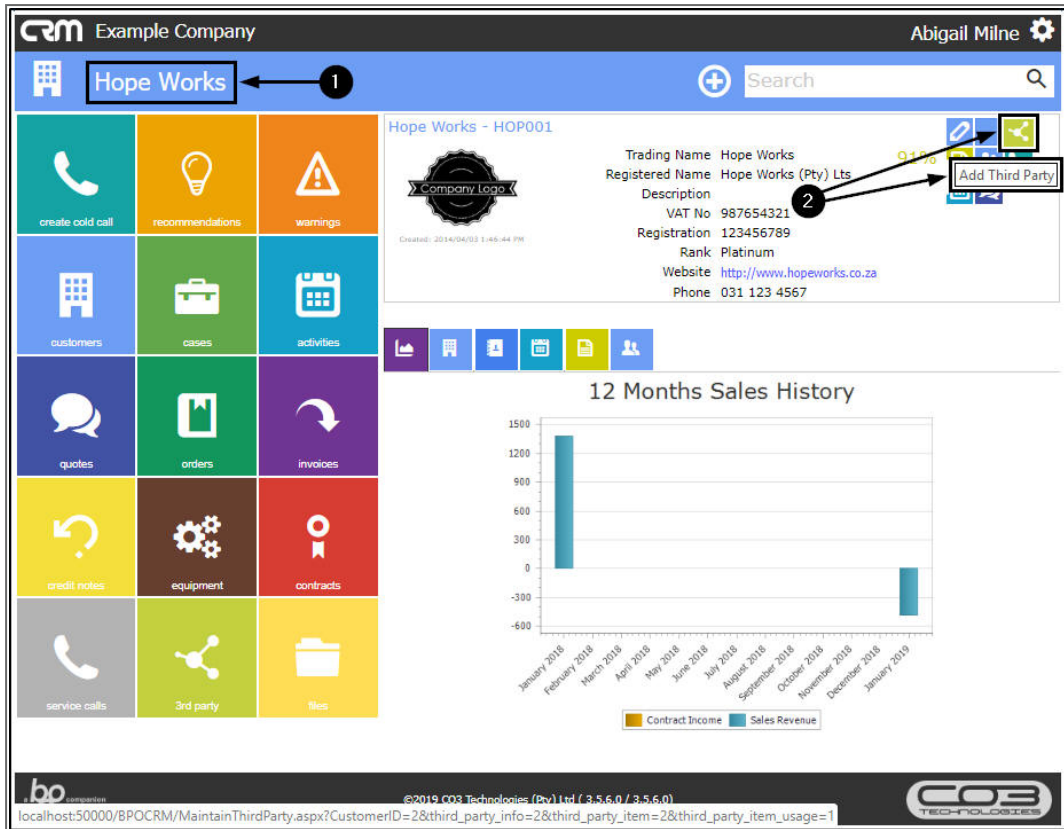
The screenshot displays a CRM interface for 'Example Company' with user 'Abigail Milne'. The main view is for customer 'Hope Works - HOP001'. A navigation pane on the left contains buttons for: create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files. The main content area shows customer details: Trading Name: Hope Works, Registered Name: Hope Works (Pty) Lts, VAT No: 987654321, Registration: 123456789, Rank: Platinum, Website: http://www.hopeworks.co.za, Phone: 031 123 4567. A '91%' progress indicator is visible. An 'Add Contact' button is highlighted with a callout box. Below the details is a '12 Months Sales History' bar chart showing 'Contract Income' (yellow) and 'Sales Revenue' (blue) from January 2018 to January 2019. The chart shows a significant positive spike in January 2018 and a negative spike in January 2019. The footer includes 'bo' logo, copyright information for CO3 Technologies (Pty) Ltd (3.5.6.0 / 3.5.6.0), and a URL: localhost:50000/BPOCRM/MaintainContact.aspx?CustomerID=2&NewContact=true&customer-name=0&customer\_info=1&ContactFields=2.

1. The **Save Contact** page will open.
2. In this page you can expand the **Customer Details** frame and add to or edit the contact details, as required.
3. When you are done, you can either **Save** any changes made,
4. Or click on either the **Back** icon or the **Customer** icon to return to the previous/Customer page.



## ADD THIRD PARTY

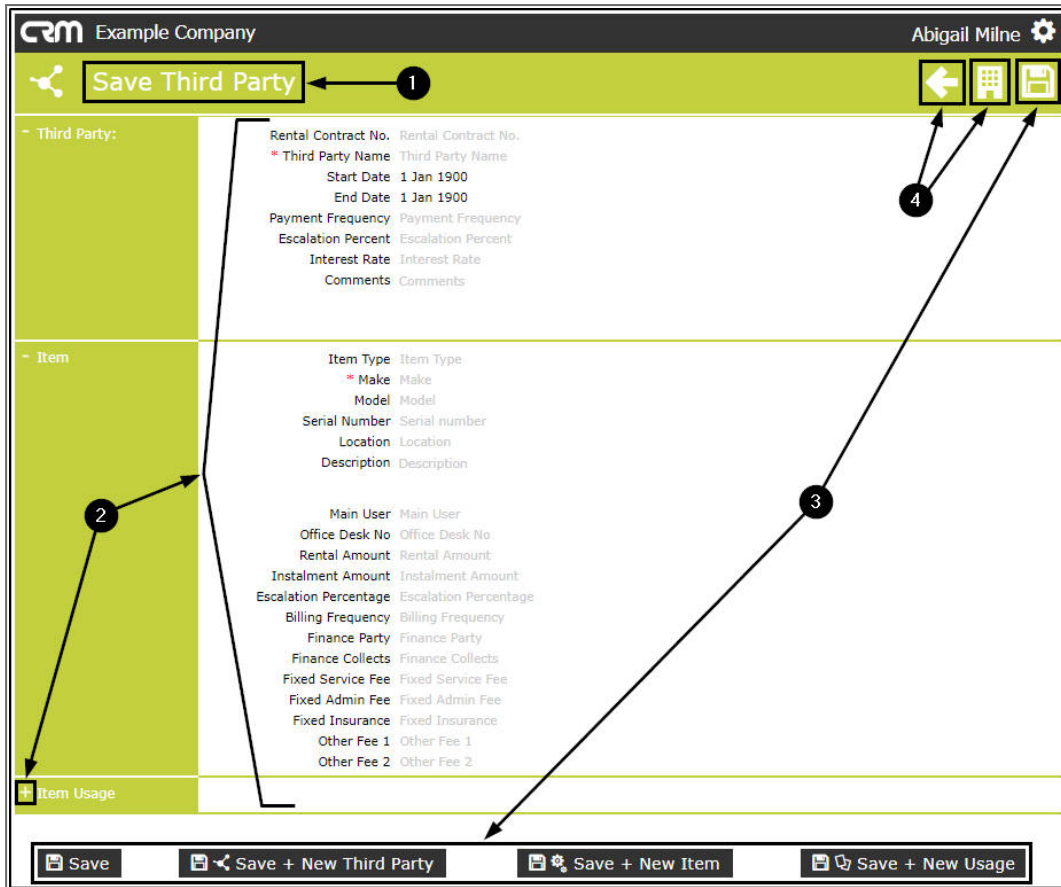
1. In the **Customer** home page,
2. Click on the **Add Third Party** action button.



1. The **Save Third Party** page will open. This page is for main information regarding the Third Party and the contract details.
2. In this page you can expand the **Item Usage** frame and [add to or edit the third party details](#), as required.
3. When you are done, you can either select one of the **Save options** to keep any changes made,
4. Or click on either the **Back** icon or the **Customer** icon to return to the previous/Customer page.

**Note:** You may not have all the third party information, but CRM provides fields for all relevant contract information. Fields with a red asterisk (\*) are mandatory.





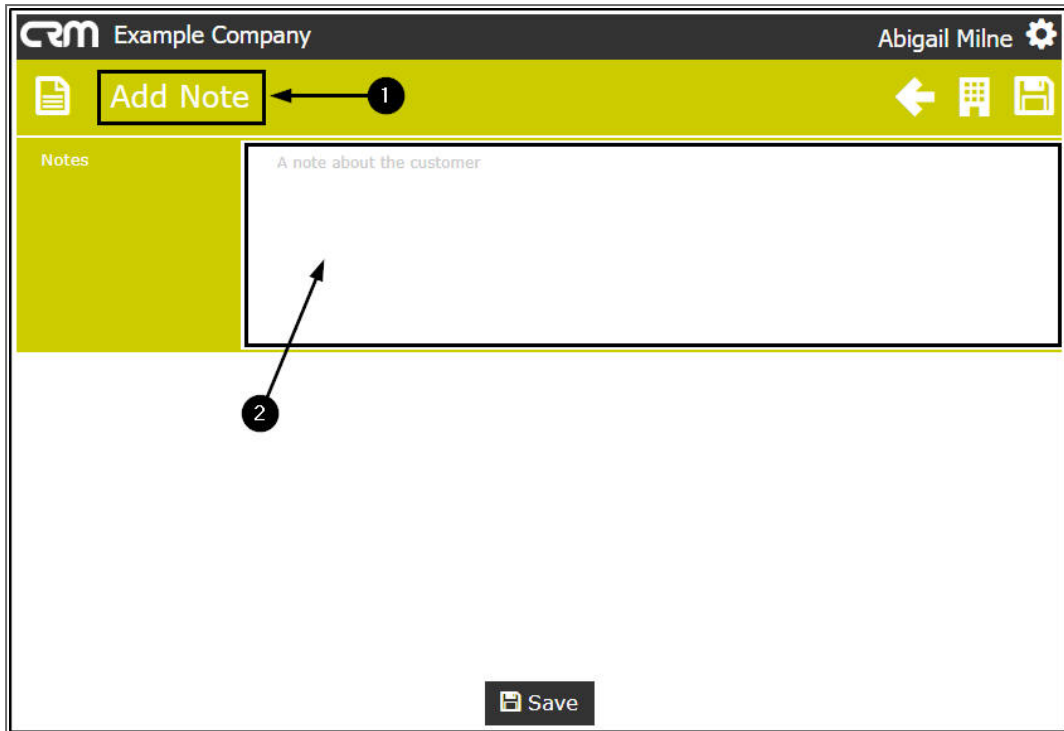
## ADD NOTE

1. In the **Customer** home page,
2. Click on the **Add Note** action button.

The screenshot displays a CRM interface for 'Example Company' with user 'Abigail Milne'. The main view is for customer 'Hope Works - HOP001'. A grid of action buttons is on the left, including 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The customer details panel shows a 91% completion status and an 'Add Note' button. Below is a '12 Months Sales History' bar chart showing 'Contract Income' (yellow) and 'Sales Revenue' (blue) from January 2018 to January 2019. The chart shows a significant positive spike in January 2018 and a negative spike in January 2019.

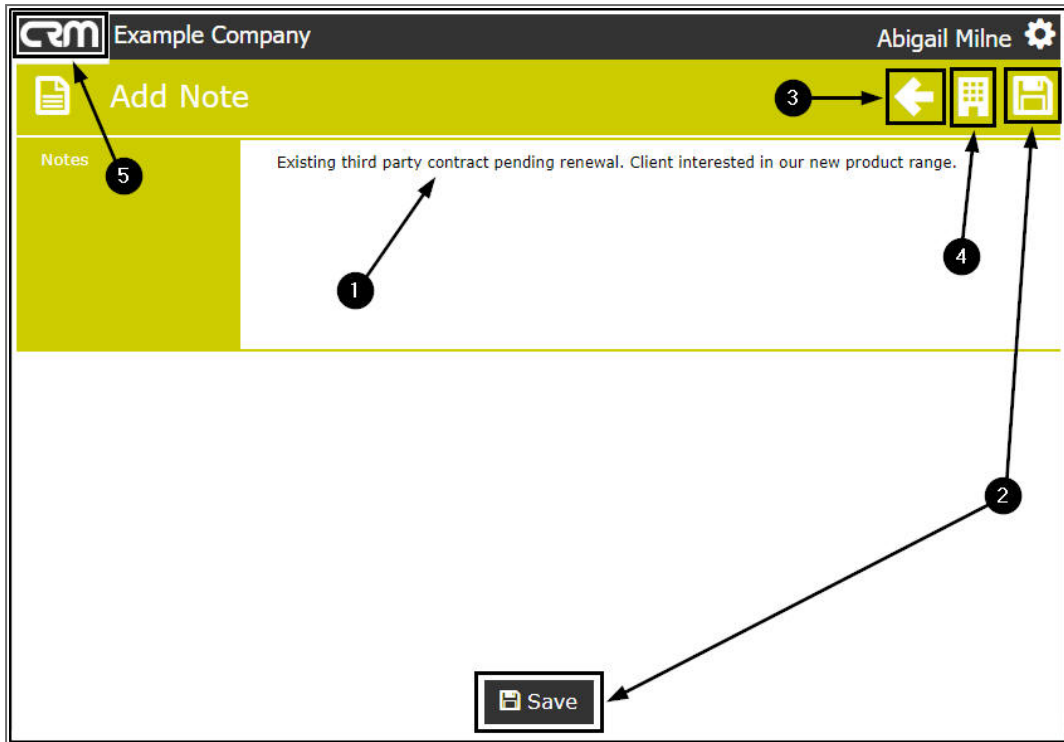
Month	Contract Income	Sales Revenue
January 2018	1800	0
February 2018	0	0
March 2018	0	0
April 2018	0	0
May 2018	0	0
June 2018	0	0
July 2018	0	0
August 2018	0	0
September 2018	0	0
October 2018	0	0
November 2018	0	0
December 2018	0	0
January 2019	0	-300

1. The **Add Note** page will open.
2. Type in a note about the customer in the frame outlined.



1. When you have typed in the required note,  
Either,
2. Click on **Save**, the note will be saved and you will return to the Customer home page.  
Or, if you do not wish to save the note:
3. Click on **Back** to return to the previous page,  
or,
4. Click on the **Customer icon** to return to the Customer home page,  
or,
5. Click on the **CRM logo** to return to the Dashboard (Home page).

**Note:** You can [view this note](#) (and any other notes linked to this customer) by clicking on the Notes Detail tile in the Customer home page.

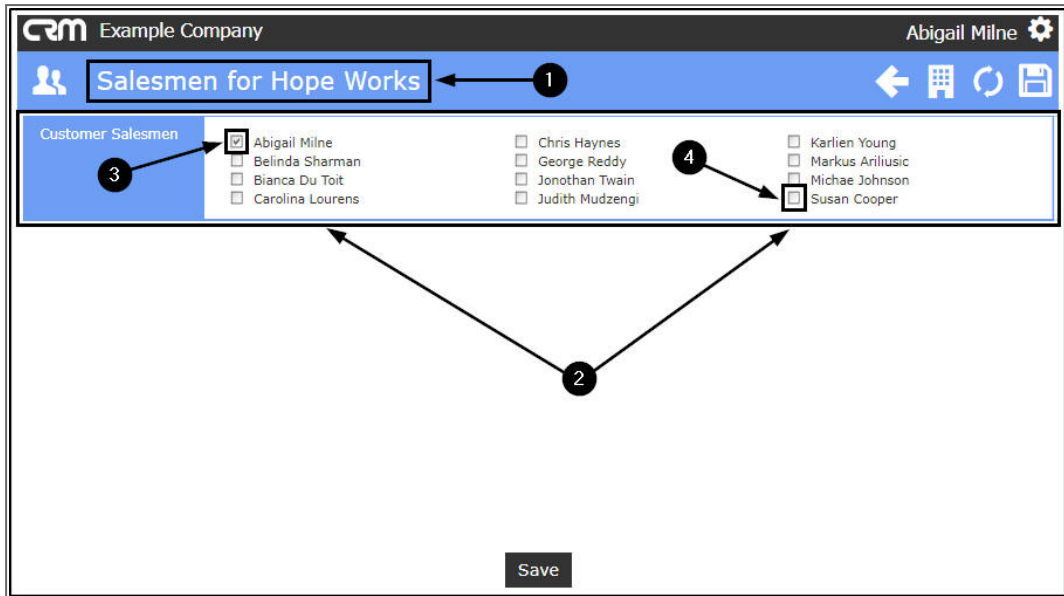


## MAINTAIN CUSTOMER SALESMEN

1. In the **Customer** home page,
2. Click on the **Maintain Customer Salesmen** action button.

The screenshot displays the CRM interface for 'Example Company' with user 'Abigail Milne'. The main view is for customer 'Hope Works - HOP001'. A sidebar on the left contains various action buttons like 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The main content area shows customer details including 'Trading Name', 'Registered Name', 'Description', 'VAT No', 'Registration', 'Rank', 'Website', and 'Phone'. A '12 Months Sales History' bar chart is shown below, with 'Contract Income' in orange and 'Sales Revenue' in blue. A callout box labeled '2' points to a 'Maintain Customer Salesmen' button in the top right corner of the customer details section. A callout box labeled '1' points to the 'Hope Works' customer name in the top navigation bar.

1. The **Salesmen for [Customer]** page will open.
2. Here you can view a list of all the company salespersons (currently set up on the system).
3. The names that have a **ticked** check box in front are currently linked to this customer.
4. To link another salesman, **select** the check box in front of that salesman's name.



When you have finished making the required changes,

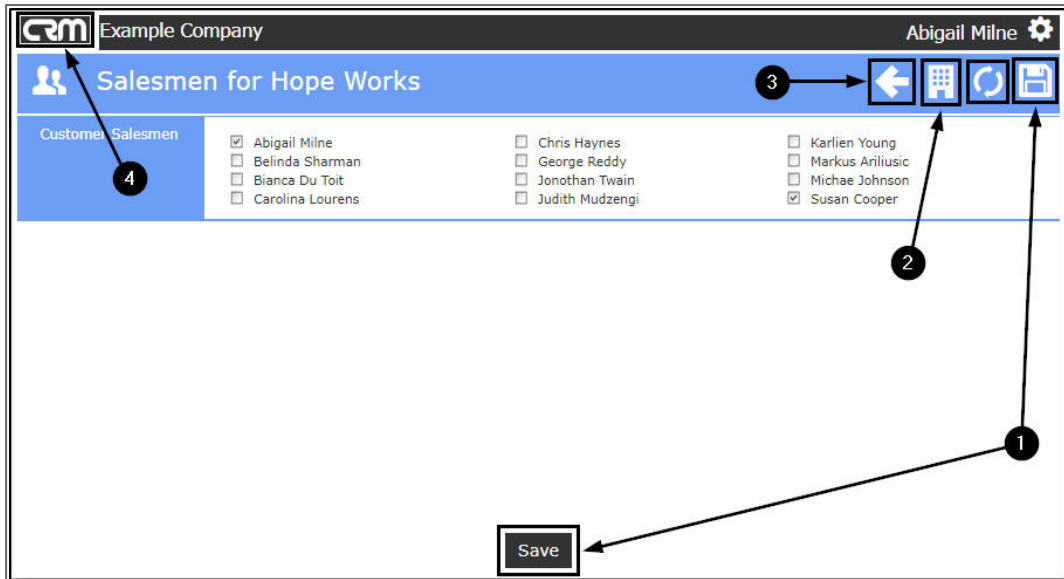
Either,

1. Click on **Save**, your changes will be saved and you will return to the Customer home page.

Or, if you do not wish to save your changes:

2. Click on **Back** to return to the previous page,  
or,
3. Click on the **Customer icon** to return to the Customer home page,  
or,
4. Click on the **CRM logo** to return to the Dashboard (Home page).

**Note:** You can [view the customer salesmen](#) by clicking on the Salesman Details tile in the Customer home page.

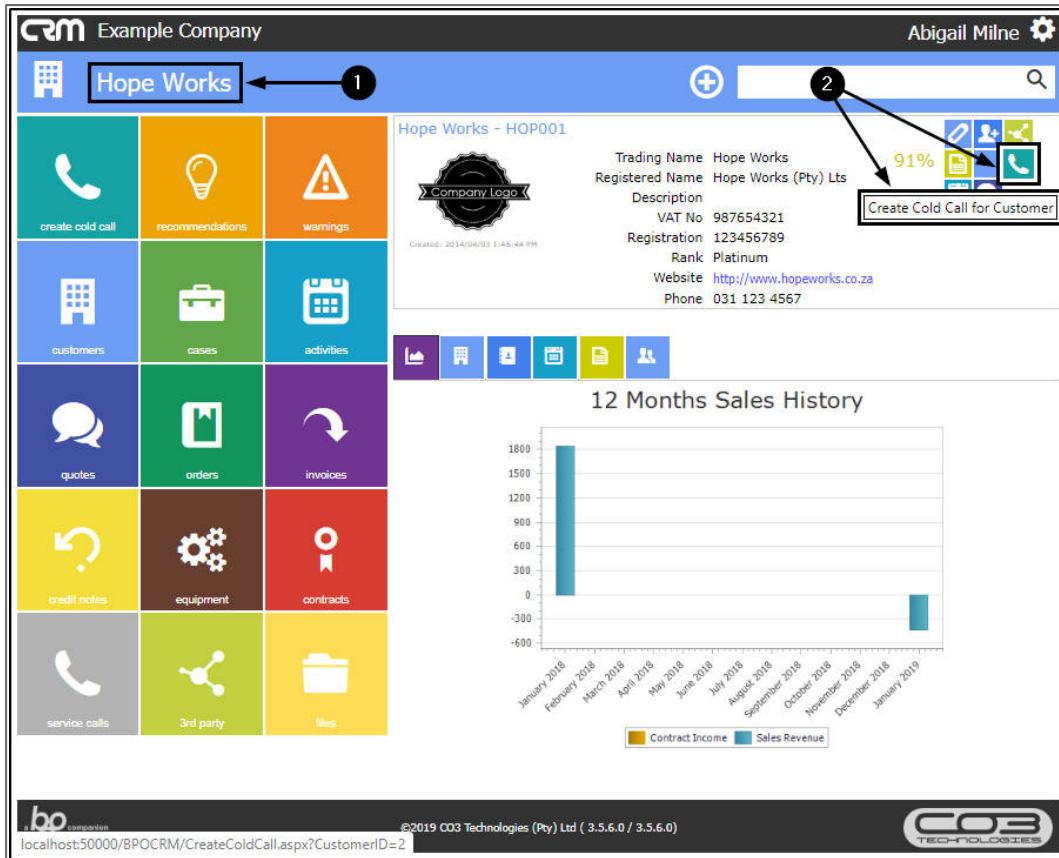


## CUSTOMER DETAILS - ACTION ITEMS

### CREATE COLD CALL FOR CUSTOMER

This will enable creating a cold call specifically for this customer.

1. In the **Customer** Home page,
2. Click on the **Create Cold Call for Customer** action button.



1. The Create Cold call page will open.
2. As this is a cold call created for this existing customer, you will note that the Customer frame will already be populated with this customer's details.
3. Complete the remaining cold call details as required. Refer to [Creating a Cold Call](#) for more information/directions.

When you have finished making the required changes,

Either,

4. Click on **Save**, your cold call information will be saved and you will return to the Customer home page.

Or, if you do not wish to save your changes:

5. Click on the **Customer icon** to return to the Customer home page,

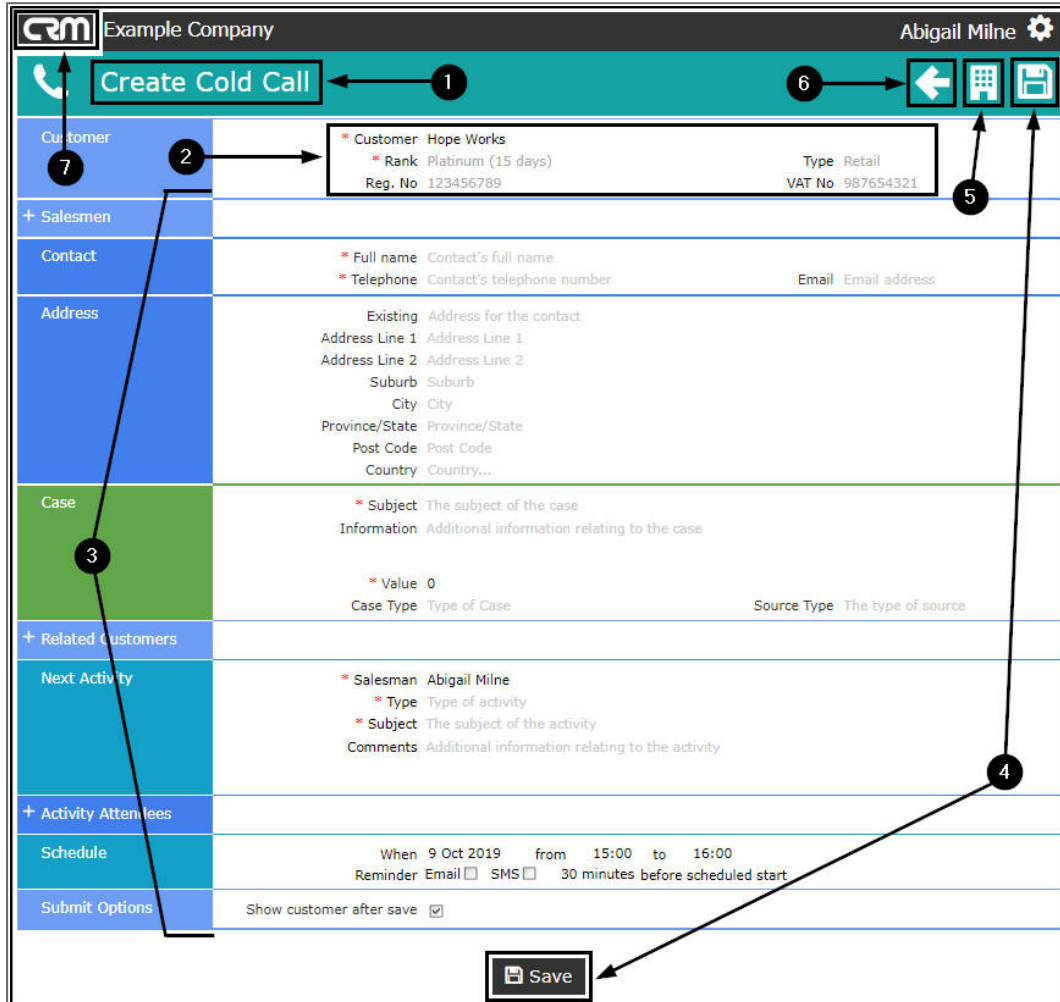


or,

6. Click on **Back** to return to the previous page,

or,

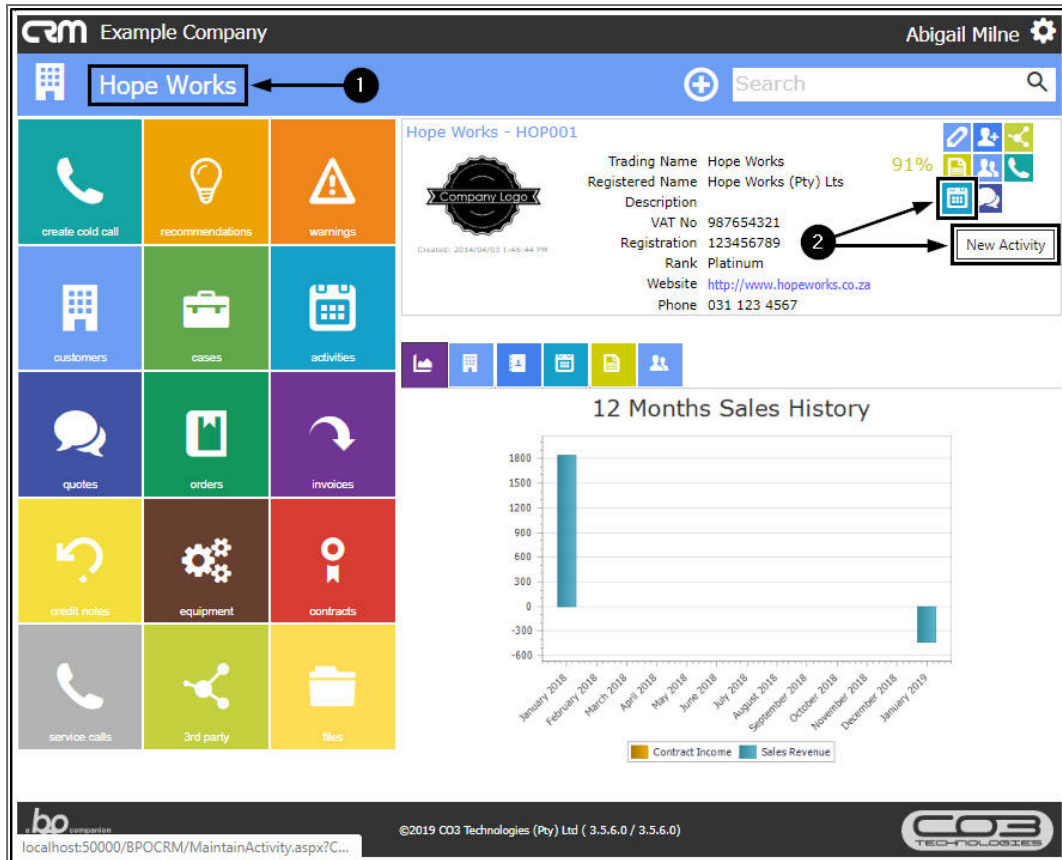
7. Click on the **CRM logo** to return to the Dashboard (Home page).



## NEW ACTIVITY

This gives you the ability to add a new Case/Activity for the current customer.

1. In the **Customer** Home page,
2. Click on the **New Activity** action button.



1. The **Save Activity** page will open.
2. You will note that the **Customer Name** has auto populated in the **Case** frame.
3. Fill in the remaining **Case, Activity** and **Quote** details, as required.  
Refer to **Add/Edit an Activity** for more information/directions.

When you have finished making the required changes,

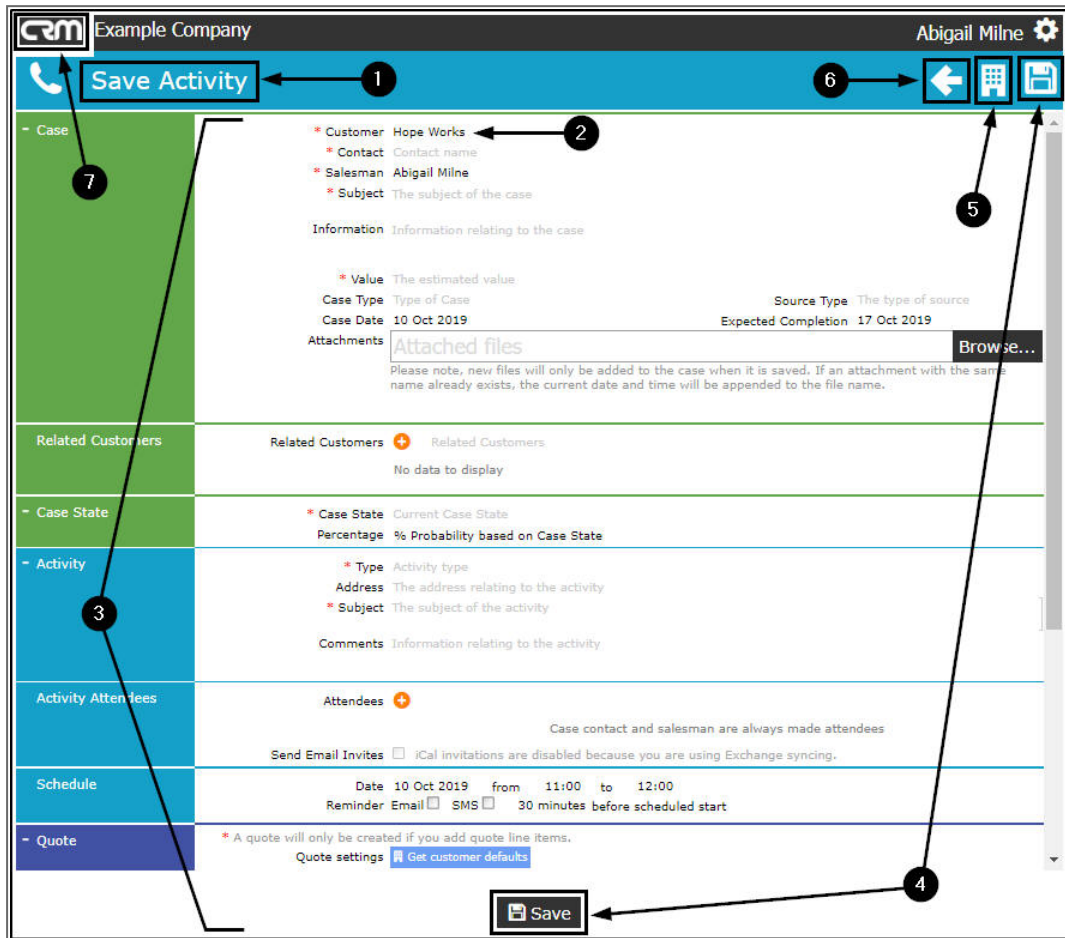
Either,

4. Click on **Save**, the new activity will be saved and you will return to the Customer home page.

Or, if you do not wish to save your changes:

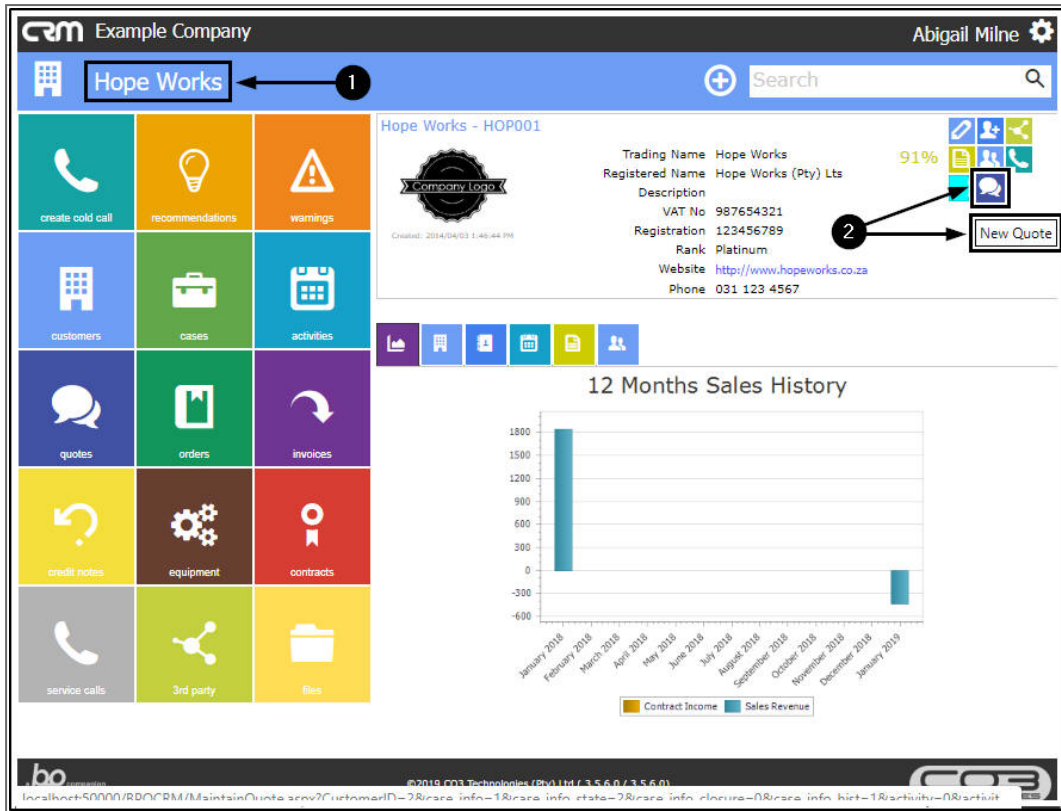
5. Click on the **Customer icon** to return to the Customer home page,  
or,

6. Click on **Back** to return to the previous page,  
or,
7. Click on the **CRM logo** to return to the Dashboard (Home page).



## NEW QUOTE

1. In the **Customer Home** page,
2. Click on the **New Quote** action button.



1. The **Save Quote** page will open.
2. You will note that some of the details in this page have auto populated.
3. Fill in the remaining **Case, Quote, Quote Financials** and **Quote Items** details, as required. Refer to [Add a New Quote](#) for more information/directions.

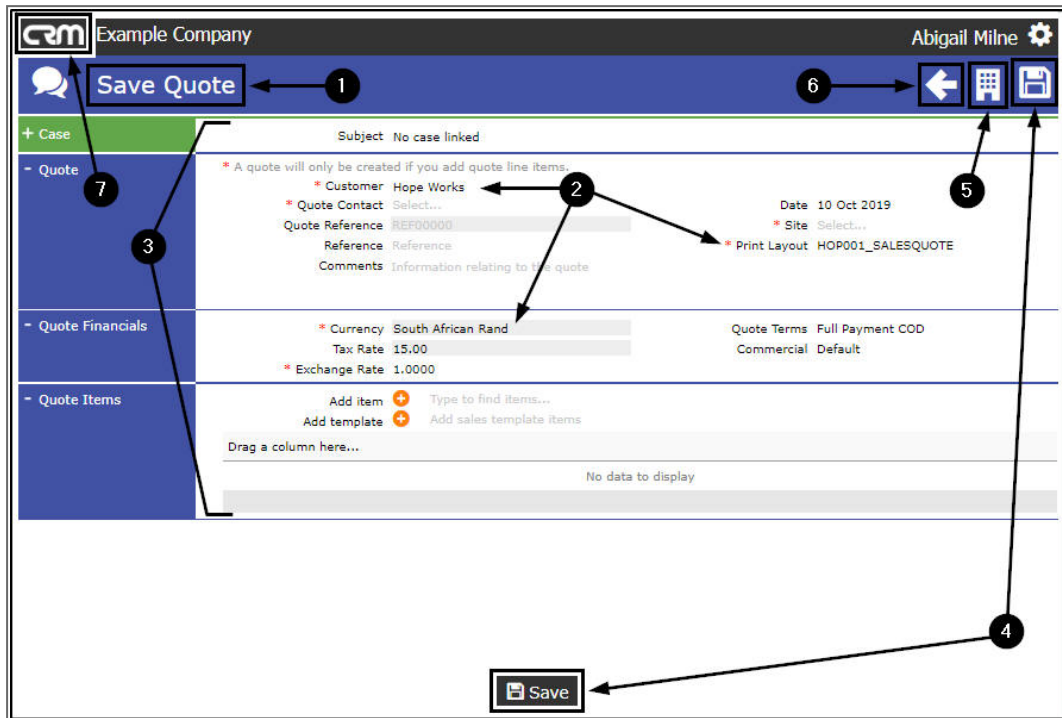
When you have finished making the required changes,

Either,

4. Click on **Save**, the new activity will be saved and you will return to the Customer home page.  
Or, if you do not wish to save your changes:
5. Click on the **Customer icon** to return to the Customer home page,  
or,
6. Click on **Back** to return to the previous page,

or,

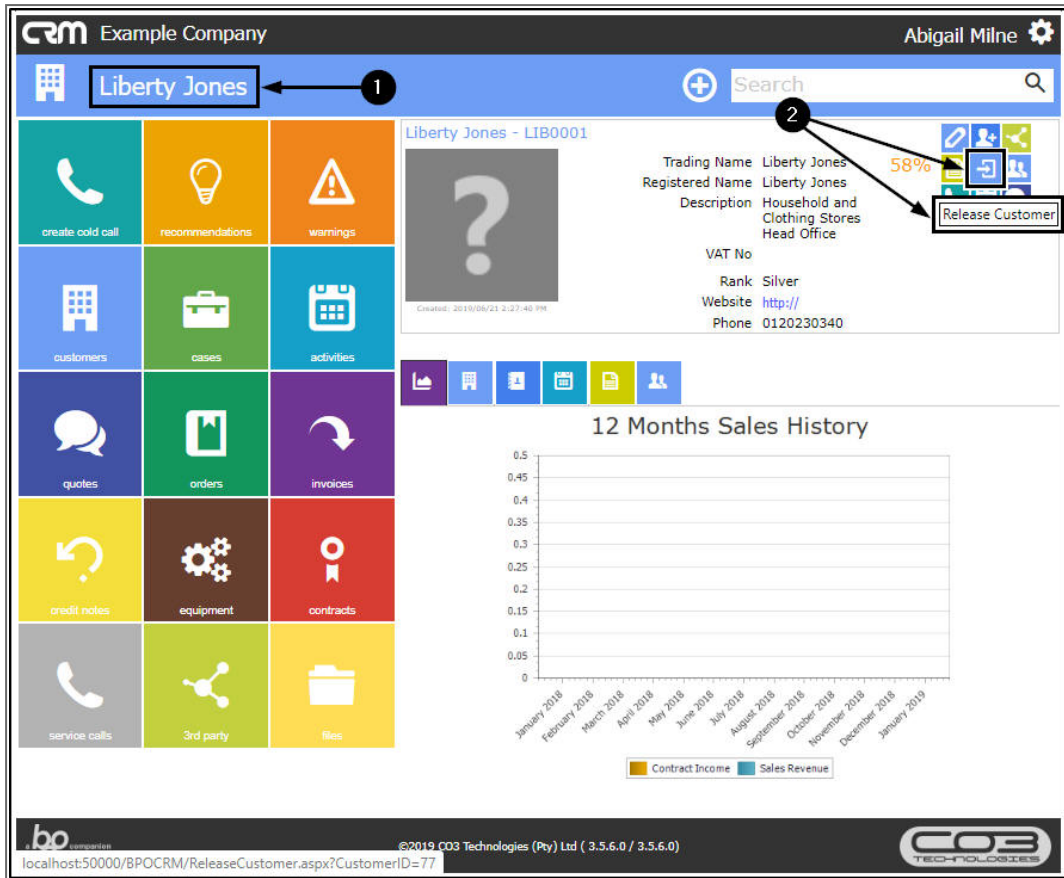
- Click on the **CRM logo** to return to the Dashboard (Home page).



## RELEASE CUSTOMER

**Note:** This **Release** action button is only available for a customer that is in status: **New - CRM**. Once the customer has moved from **New - CRM** to **Released**, your accounts department can check/update all financial details and then either **Approve or Decline** the Customer (this will move the customer to the **Active** status if **Approved** or back to the **New** status if **Declined**).

- In the (New - CRM) **Customer** Home page,
- Click on the **Release Customer** action button.



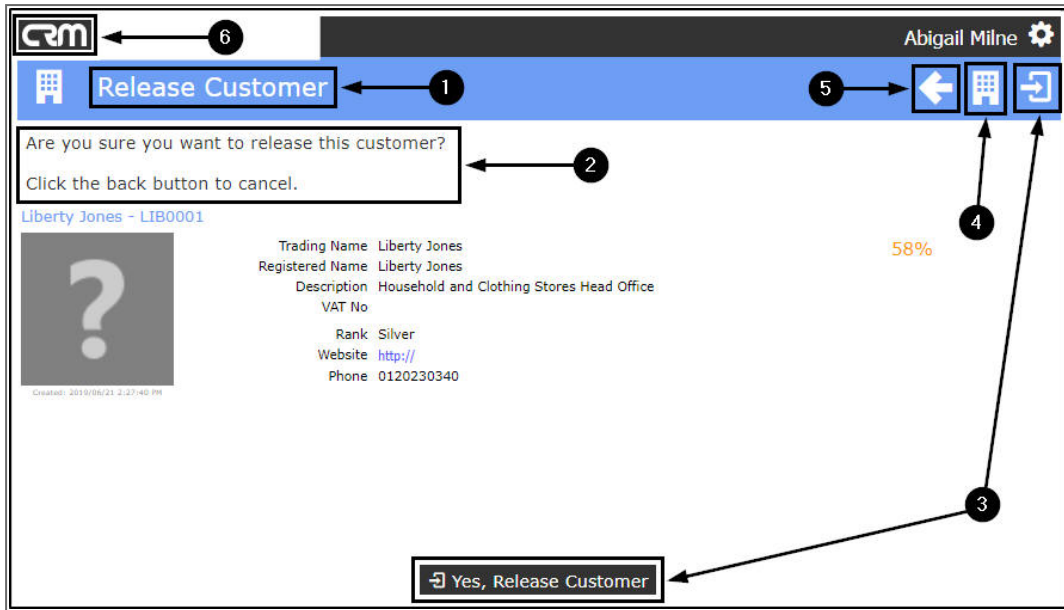
1. The Release Customer page will open.
2. A message will display on this page:
  - **Are you sure you want to release this customer? Click the Back button to cancel.**

Either,
3. Click on the **Yes, Release Customer** button or the **Save** button to release this customer.
 

Or, if you do not wish to release this customer:
4. Click on the **Customer icon** to return to the Customer home page,
 

or,
5. Click on **Back** to return to the previous page,
 

or,
6. Click on the **CRM logo** to return to the Dashboard (Home page).



1. If you released the customer, you will return to the Customer Home page.
2. Note that the Release Customer button is no longer available.

This customer will now need to be **Approved** in BPO in order to become Active.

The screenshot displays a CRM interface for 'Example Company' with the user 'Abigail Milne'. The main focus is on the customer profile for 'Liberty Jones - LIB0001'. The interface includes a navigation menu on the left with buttons for 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The customer details section shows a profile picture placeholder, a 58% progress indicator, and fields for 'Trading Name', 'Registered Name', 'Description', 'VAT No', 'Rank', 'Website', and 'Phone'. A toolbar with icons for editing, sharing, and other actions is visible. Below the details is a '12 Months Sales History' chart showing 'Contract Income' and 'Sales Revenue' from January 2018 to January 2019. The chart area is currently empty.

CRM.002.014