

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

# CRM BASICS

## AN INTRODUCTION TO CRM

CRM is a **Customer Relations Management** tool that enables Sales Teams to maintain customer retention and increase new sales.

Salespeople can use CRM to:

- Log potential deals (Cases)
- View and add customers and contacts
- Support customer acquisitions by giving the sales team tools to remind them of activities coming up and keeping a full record of previous activities. Previous activity notes are stored in a structured form so that the information can be reused at a later stage.
- Create end of contract alerts and work flows to upgrade and renew customer contracts.
- Producing excellent detailed customer profitability information, ensuring a focus on the key customer accounts.

CRM can also be viewed as an **on-line diary** for the salesman:

- It manages their business via a transportable device, e.g. a laptop or tablet.
- It removes the need for paperwork.
- It measures the Salesman's performance.
- It motivates the Salesman to be organised.

Our CRM application integrates with **BPO2** and our **Sales Connect** application.

CRM is **Salesman Specific**:

- CRM is designed with the Salesman in mind. All information viewed is specific to the user that is logged in. This user, sees only his / her Customers, Cases, Activities, Pipeline, etc. and can plan accordingly.

If you are a **Sales Manager**:

- You can view your team's information by selecting [Show items for subordinates](#) in Settings - Options.
- Your team is defined by the employee hierarchy in BPO2. Each employee within the sales team needs to have their sales manager set up as 'Manager' in the [Employees](#) screen.

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**Access:** Webpage - [http://\[servername\]:\[portno\]/BPOCRM/User.aspx](http://[servername]:[portno]/BPOCRM/User.aspx)

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## CRM PROCESS FLOW

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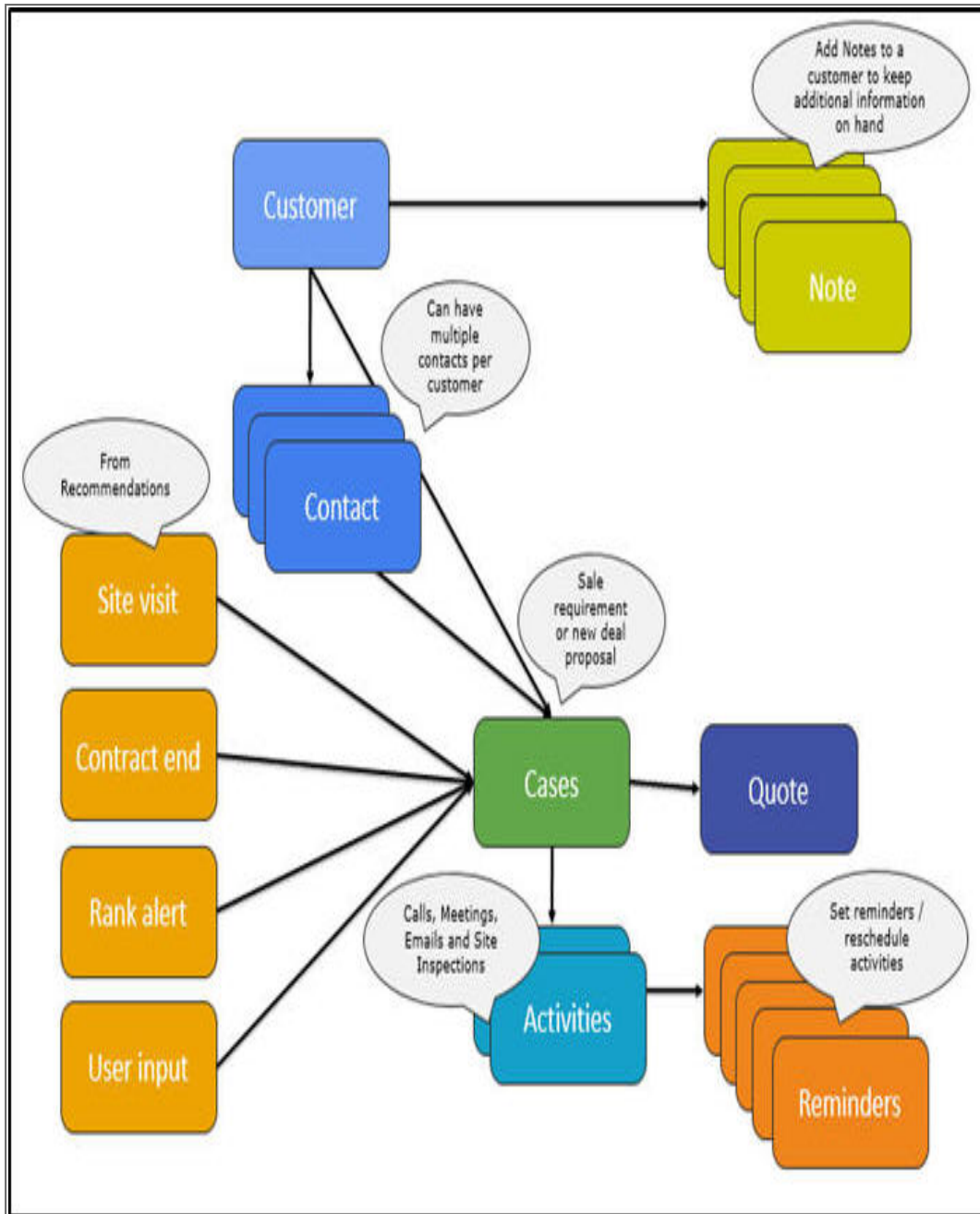
- A Case is like an opportunity: a reason to engage with a client in order to fulfill a sale requirement or propose a deal. A Case will ideally give rise to a Quote and subsequent New Deal. A Case can be viewed as an umbrella over all the underlying activities that work towards achieving a contract with that customer.
- An Activity is any type of interaction that involves your customer, for example: a Call, an Email, a Meeting, an On-Site Inspection.
- Recommendations are notifications that you can view and follow up on for example:
  - A [Customer Rank](#) Call is due
  - A Customer Contract is due to expire
  - A Customer Quote is due to expire

These recommendations will pop up a couple of days before expiry and are a timeous prompt to the Salesperson to pay more attention to that customer with regards to the notification.

- Notes are logs of information the Salesman has built up on the customer. They can be viewed in both CRM and BPO and cannot be deleted. This is very useful for sharing information for example with Call Centre staff and Technicians who will also have contact with the customer and would find background information useful.
- The Reminders system is crucial for the salesman to gain advantage over his/her competitors. For example, reminders can be set for

- clients birthdays and anniversaries

When the salesman contacts the client acknowledging these reminders, a personal touch is created which builds relationship between the salesperson and the client.

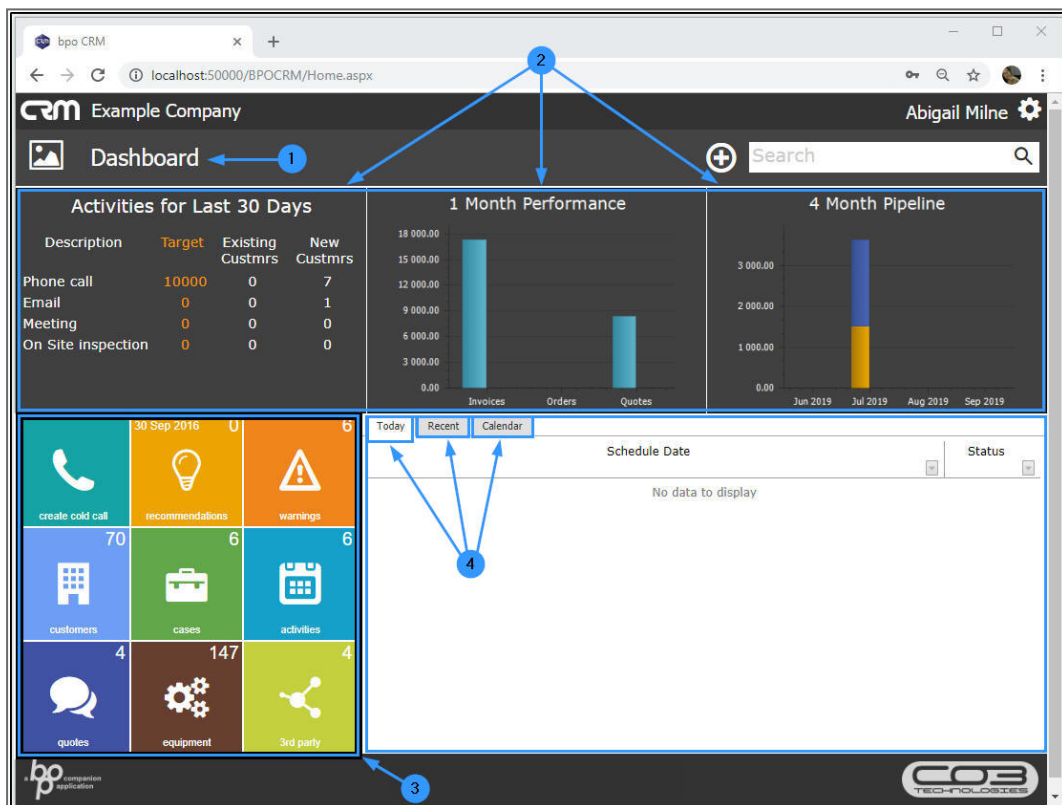


The 2 main pages where the salesman will usually start in CRM are: the **CRM Homepage** or **CRM Customer Homepage**.

## **THE CRM HOMEPAGE**

After log in, this is the first page that is displayed.

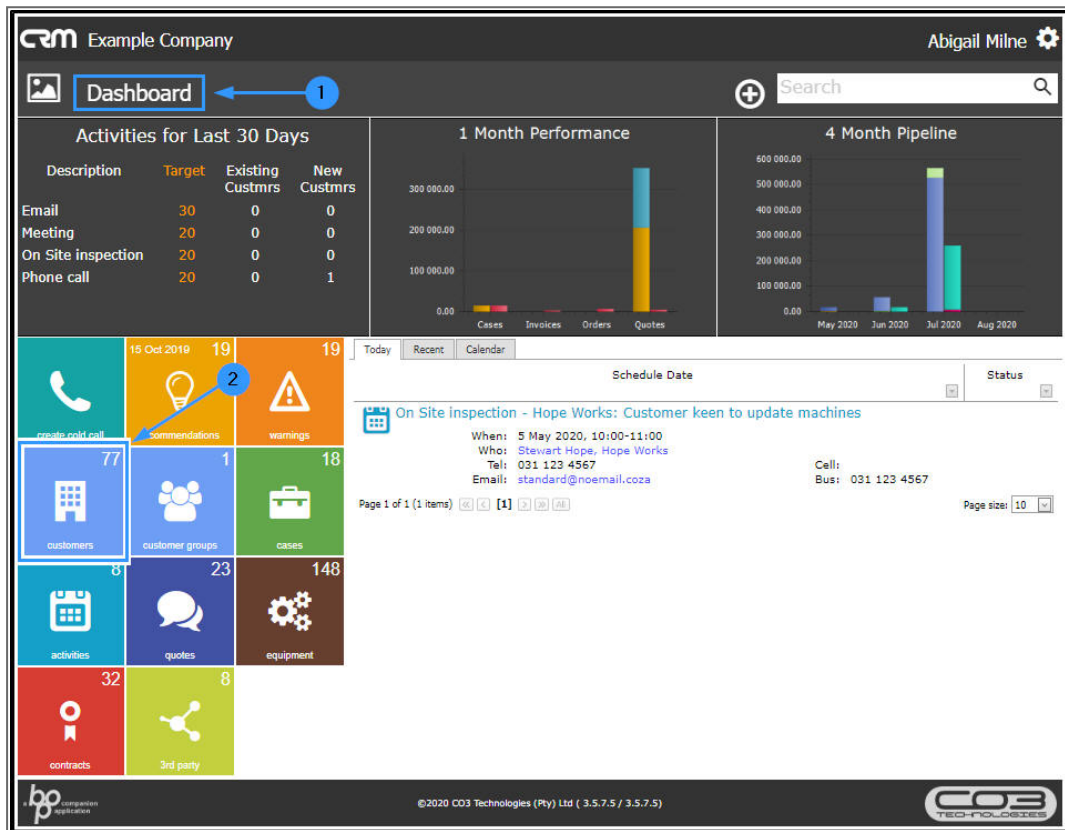
1. The top half of this page contains the **Dashboard** where the salesperson can immediately view his / her:
2. **Sales Targets, Sales Performance**, how far he / she is in the process **Pipeline**.
3. The lower, left side of this page contains tiles which will direct you to a Salesman-specific list of information. For example, the **Activities** tile will direct the salesperson to a list of all the activities (for all customers) that are linked to him / her on the system.
  - **Note:** The count displayed in the top right hand side of these tiles is only available on this home page, not on the Customer Page.
4. The lower right side of this page auto opens with the **Today's Activities** frame at the fore but the salesman can select tabs to view **Recent Activities** or **Calendar Activities** instead.



## THE CUSTOMER HOME PAGE

After initial log in, you will need to navigate to the **Customer Homepage** from the **CRM Homepage**:

1. In the **Homepage**,
2. Select the **Customers** tile.

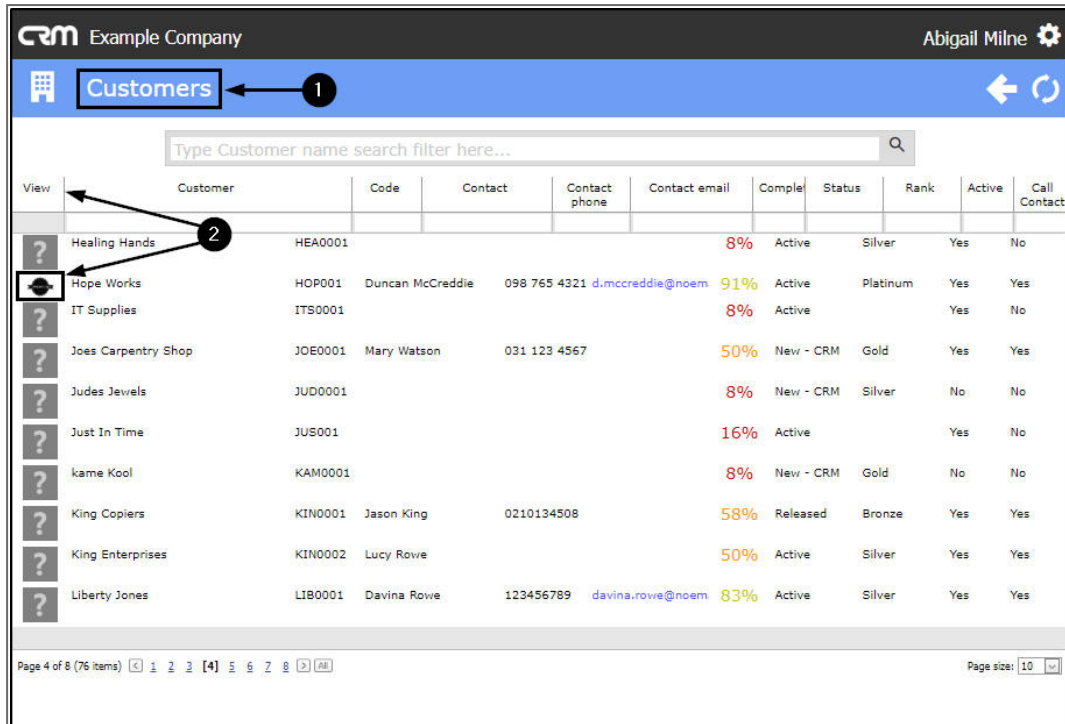


The screenshot shows the CRM Customer Homepage for 'Example Company' with user 'Abigail Milne'. The navigation menu at the top left has 'Dashboard' selected, indicated by a blue circle and the number '1'. The main dashboard area contains several widgets:

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

Description	Target	Existing Custmrs	New Custmrs
Email	30	0	0
Meeting	20	0	0
On Site inspection	20	0	0
Phone call	20	0	1
- 1 Month Performance:** A bar chart showing performance metrics for Cases, Invoices, Orders, and Quotes.
- 4 Month Pipeline:** A bar chart showing the pipeline over a 4-month period from May 2020 to August 2020.
- Navigation Tiles:** A grid of tiles for various CRM functions:
  - customers: 77 (highlighted with a blue circle and '2')
  - customer groups: 1
  - cases: 18
  - activities: 8
  - quotes: 23
  - equipment: 148
  - contracts: 32
  - 3rd party: 8
- On Site Inspection Detail:** A detailed view of an inspection scheduled for 5 May 2020, 10:00-11:00, by Stewart Hope at Hope Works. Contact information includes Tel: 031 123 4567, Email: standard@noemail.co.za, Cell: 031 123 4567, and Bus: 031 123 4567.

1. The **Customers** listing page will open,
2. In the **View** column, click on the **Customer logo**.



1. The selected **Customer Homepage** will open.
2. As in the Homepage, the **Dashboard** is displayed across the top of this page.
3. The lower, left side of this page contains tiles which will direct you to a Customer-specific list of information. For example, the **Activities** tile will direct the salesman to a list of all the activities for the selected customer that are linked to him on the system.

The lower right side of this page is split into 2 parts:

4. The upper part displays the Customer's **company details**, for example: Trading Name, Registered Name, Phone Number etc.
5. The lower part will display details according to the **Customer Information** tile selected, for example: 12 Month Sale History, Contacts, Open Activities.

CRM Example Company
Abigail Milne

☰
Hope Works
➕ Search

#### Activities for Last 30 Days

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

#### 1 Month Performance

#### 4 Month Pipeline

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 [www.hopeworks.co.za](http://www.hopeworks.co.za)

Phone 031 123 4567

#### 12 Months Sales History

1
2
3

4
5

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