

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

CRM BASICS

ADD A CONTACT

Each customer needs to have a **contact** , in order to:

- Call
- Send Emails
- Send Activity Notes

A customer must have a contact linked, who is set to **Receive Sales Calls**.

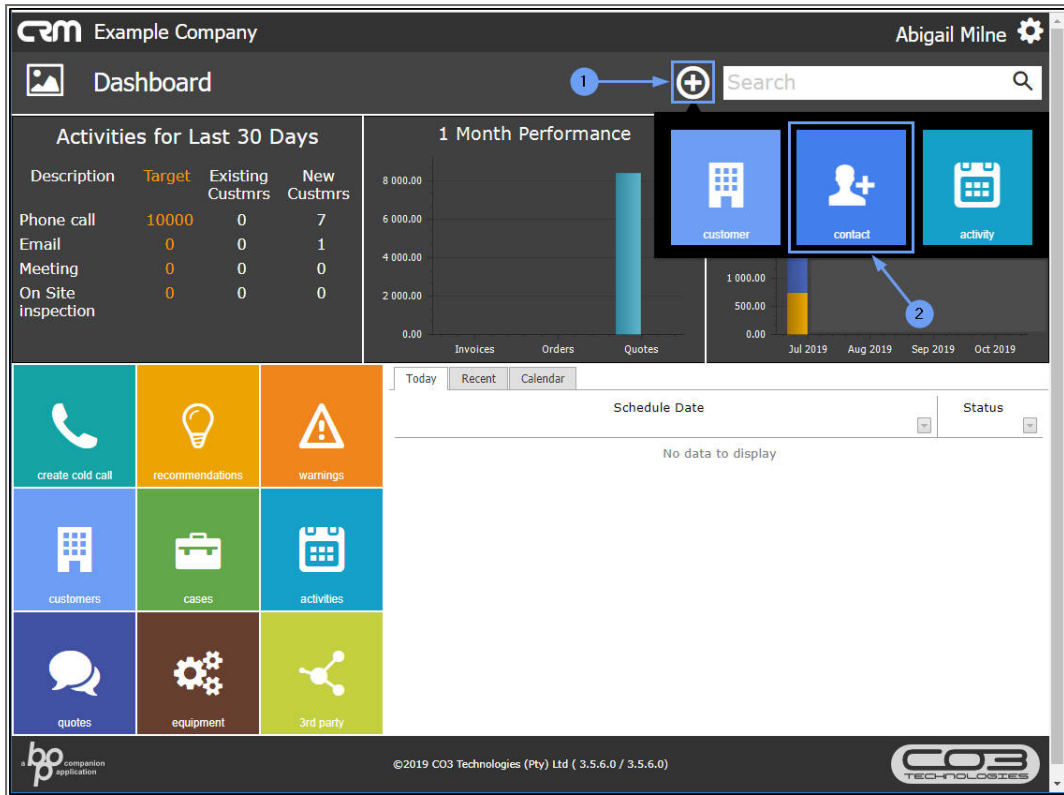
It is important to remember that additional contact people will need to be configured later within Nucleus Service:

- In order for a customer to be approved within BPO, an **Accounts Contact** is required. This contact will receive invoicing.
- Each customer should have a **Primary Contact**. This person will receive notifications regarding service call status changes.
- You can also [add a contact in the Save Customer page](#).

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

ADD NEW CONTACT FROM THE HOMEPAGE

- Click on the **Add new items...** icon.
- Click on the **Contact** tile.



CONTACT INFO MANDATORY FIELDS

1. The **Save Contact** screen will open with the **More Details** section automatically expanded to display the **Contact Info** frame.
2. Click in the mandatory fields [*] and type in the contact details.
 - **Note:** that only the **First Name** and **Last Name** fields are mandatory but you can add details to all the fields in this section if you have the information on hand.

Save Contact

- Customer

*** Customer Search**

Type new customer name or search for existing customer

- Customer Details

*** Name**

The customer name

Holding company -

Type The customer type

Main Salesman Salesman assigned to this

Website The web site address

Phone The phone number

Reg. No Registration number

VAT No The VAT number

Reporting Area The customer reporting area

+ More Details

- Contact Info

Title Title of contact

*** First Name** ← 2

*** Last Name**

Preferred A name the contact prefers

Other emails Other email addresses separated with semi-colons

Description Any narrative description

Birthday Birthday of contact

Telephone Telephone number

Mobile Mobile phone number

Email Email address

Fax Fax number

Address

Address Choose existing or enter new address

Address Line 1 Address Line 1

Address Line 2 Address Line 2

Address Line 3 Address Line 3

Address Line 4 Address Line 4

Address Line 5 Address Line 5

Post Code Post Code

Country Country...

CRM Info

*** Main Contact?** Is main sales contact?

CRM Role The contact type

Send SMS

Contact Picture

Contact Parent The manager

Accepts Sales Calls

Send Email

Submit Options

Show customer after save

CUSTOMER SEARCH

NEW CUSTOMER

If you are adding the contact details for a **new** customer:

1. Go to the **Customer** frame, click in the **Customer Search** field and type in the new customer name.
2. Go to the **Customer Details** frame. As you click anywhere in this frame, the **Name** field will auto populate with the same text that was typed into the **Customer Search** field.
3. Click in the **Rank** field and select from the drop-down list the Rank **Call Cycle** for this new customer (e.g. **Platinum** Rank = the call cycle for this customer is every **15** days).

Rank is based on how much you **value** this customer and helps to define the call cycle per client. For example, a **Wood** ranking indicates that you will only contact this customer every **365** days - this customer is not valuable to you. However a **Platinum** ranking indicates that this is a very important customer that you wish to maintain a good relationship with, therefore you will contact them every **15** days.

Each customer must be linked to a Rank in CRM. **Customer Rank** can also be linked in the Customer Maintenance screen in Nucleus Service.

The above mentioned fields are mandatory [*] but you can add details to all the fields in these frames if you have the information on hand.

The screenshot shows a web browser window with the URL `localhost:50000/BPOCRM/MaintainContact.aspx?CustomerID=0&NewContact=true&customer-name=2&customer_info=2&Co...`. The page title is "Save Contact" and the user is "Abigail Milne".

The form sections and their fields are as follows:

- Customer:**
 - * Customer Search (Callout 1)
- Customer Details:**
 - * Name: the customer name (Callout 2)
 - Holding company: -
 - Type: The customer type
 - Main Salesman: Salesman assigned to this cu
 - Website: The web site address
 - Phone: The phone number
 - Reg. No: Registration number
 - VAT No: The VAT number
 - Reporting Area: The customer reporting area
 - * Rank: Customer rank (Callout 3)
- More Details:** + More Details
- Contact Info:**
 - Title: Title of contact
 - * First Name: Jason
 - * Last Name: King
 - Preferred: A name the contact prefers
 - Other emails: Other email addresses separated with semi-colons
 - Description: Any narrative description
 - Telephone: Telephone number
 - Mobile: Mobile phone number
 - Email: Email address
 - Fax: Fax number
 - Birthdays: Birthday of contact
- Address:**
 - Address: Choose existing or enter new address
 - Address Line 1: Address Line 1
 - Address Line 2: Address Line 2
 - Address Line 3: Address Line 3
 - Address Line 4: Address Line 4
 - Address Line 5: Address Line 5
 - Post Code: Post Code
 - Country: Country...
- CRM Info:**
 - * Main Contact?: Is main sales contact?
 - CRM Role: The contact type
 - Send SMS:
 - Contact Picture:
 - Contact Parent: The manager
 - Accepts Sales Calls:
 - Send Email:
- Submit Options:**
 - Show customer after save:

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

CURRENT CUSTOMER

If you are adding the contact details for a **current** customer:

1. Hover over the **Customer Search** field, a drop-down arrow will be revealed. Click on this arrow to display a list of all the customers on the system.
2. Select the relevant customer to be linked to the new contact.

The screenshot shows the 'Save Contact' form in a CRM system. The form is titled 'Save Contact' and is for 'Example Company'. The user 'Abigail Milne' is logged in. The form is divided into several sections: Customer, Customer Details, Contact Info, Address, CRM Info, and Submit Options. The 'Customer Search' field is highlighted with a red box and a red arrow labeled '1'. A dropdown menu is open, showing a list of customers with columns for Code, Name, and Status. The 'King Enterprises' entry is highlighted with a red box and a red arrow labeled '2'. The 'Contact Info' section shows the contact details for 'Jason King'. The 'Address' section shows the address fields. The 'CRM Info' section shows the contact type and other details. The 'Submit Options' section shows the 'Show customer after save' checkbox.

Code	Name	Status
JOE0001	Joes Carpentry Shop	New - CRM
JUD0001	Judes Jewels	New - CRM
JUS001	Just In Time	Active
KIN0001	King Copiers	New - CRM
KIN0002	King Enterprises	New - CRM
LIB0001	Liberty Jones	New - CRM
LIT0001	Little Bee Honey	Active

SELECT AN ADDRESS

If this is a current customer already loaded into CRM, you can select an **address**.

1. Hover over the **Address** field, a drop-down arrow will be revealed. Click on this arrow to display a list of all the shipping addresses linked to this customer.
2. Select the relevant address to be linked to the new contact.

CRM Example Company Abigail Milne

Save Contact

Customer * Customer Search King Enterprises

Customer Details

- * Name King Enterprises
- Holding company Reg. No 01020304
- Type Legal VAT No 111222333
- Main Salesman Abigail Milne Reporting Area Durban
- Website www.kingenterprises.co.za
- Phone 0123456789 * Rank Silver (Call cycle: 60)

Contact Info

- Title Title of contact
- * First Name Jason Telephone Telephone number
- * Last Name King Mobile Mobile phone number
- Preferred A name the contact prefers Email Email address
- Other emails Other email addresses separated with semi-colons Fax Fax number
- Description Any narrative description
- Birthdate Birthday of contact

Address

Address

Type	Line 1	Line 2	Line 3	Line 4	Line 5	Post Code	Country
New							
SHIP	1 Richmond Street	Richmond Town	Richmond City			RICH01	South Africa
SHIP	2 Upton Road	Upton Town	Upton City			UPT01	South Africa
SHIP	1 Downton Street	Downton Town	Downton City			DOW001	South Africa

CRM Info

- * Main Contact? Is main sales contact?
- CRM Role The contact type
- Send SMS
- Contact Picture
- Contact Parent The manager
- Accepts Sales Calls
- Send Email

Submit Options

Show customer after save

CREATE A NEW ADDRESS

If the new contact address is not on this list:

1. As you click in the **Address** field ensure that you select **New**.

CRM Example Company Abigail Milne

Save Contact

Customer * Customer Search King Enterprises

Customer Details

* Name King Enterprises
Holding company Reg. No 01020304
Type Legal VAT No 111222333
Main Salesman Abigail Milne Reporting Area Durban
Website www.kingenterprises.co.za
Phone 0123456789 * Rank Silver (Call cycle: 60)

Contact Info

Title Title of contact
* First Name Jason Telephone Telephone number
* Last Name King Mobile Mobile phone number
Preferred A name the contact prefers Email Email address
Other emails Other email addresses separated with semi-colons Fax Fax number
Description Any natural description
Birthday Birthday of contact

Address

Type	Line 1	Line 2	Line 3	Line 4	Line 5	Post Code	Country
	New						
SHIP	1 Richmond Street	Richmond Town	Richmond City			RJCH01	South Africa
SHIP	2 Upton Road	Upton Town	Upton City			UPT01	South Africa
SHIP	1 Downton Street	Downton Town	Downton City			DOW001	South Africa

Address Line 5 Address Line 5

CRM Info

* Main Contact? Is main sales contact?
CRM Role The contact type
Send SMS
Contact Picture
Contact Parent The manager
Accepts Sales Calls
Send Email

Submit Options

Show customer after save

1. With **New** selected,
2. You can now type in the new address in all the relevant fields

CRM Example Company
Abigail Milne

Save Contact

Customer	* Customer Search King Enterprises
Customer Details	* Name King Enterprises Holding company Type Legal Main Salesman Abigail Milne Website www.kingenterprises.co.za Phone 0123456789 Reg. No 01020304 VAT No 111222333 Reporting Area Durban * Rank Silver (Call cycle: 60)
+ More Details	
Contact Info	Title Title of contact * First Name Jason * Last Name King Preferred A name the contact prefers Other emails Other email addresses separated with semi-colons Description Any narrative description Telephone Telephone number Mobile Mobile phone number Email Email address Fax Fax number
Address	Birthday Birthday of contact Address <input type="text" value="New"/> 1 Address Line 1 <input type="text" value="Address Line 1"/> Address Line 2 <input type="text" value="Address Line 2"/> Address Line 3 <input type="text" value="Address Line 3"/> Address Line 4 <input type="text" value="Address Line 4"/> Address Line 5 <input type="text" value="Address Line 5"/> Post Code <input type="text" value="Post Code"/> Country <input type="text" value="Country"/> 2
CRM Info	* Main Contact? Is main sales contact? CRM Role The contact type Send SMS <input type="checkbox"/> Contact Picture <input type="button" value="Browse..."/> Contact Parent The manager Accepts Sales Calls <input checked="" type="checkbox"/> Send Email <input type="checkbox"/>
Submit Options	Show customer after save <input checked="" type="checkbox"/>

THE 'CRM INFO' FRAME.

Move down the page to the **CRM Info** frame.

MAIN CONTACT

1. Hover over the **Main Contact** field to reveal a drop-down arrow. Click on this arrow to display a drop-down list with the options: **Yes** and **No**.
2. In this example, **Yes** is selected.

CRM Example Company
Abigail Milne

+ Save Contact ←

- Customer * Customer Search King Enterprises

- Customer Details

* Name King Enterprises

Holding company

Type Legal

Main Salesman Abigail Milne

Website www.kingenterprises.co.za

Phone 0123456789

Reg. No 01020304

VAT No 111222333

Reporting Area Durban

+ More Details

* Rank Silver (Call cycle: 60)

- Contact Info

Title Title of contact

* First Name Jason

* Last Name King

Preferred A name the contact prefers

Other emails Other email addresses separated with semi-colons

Description Any narrative description

Birthdays Birthdays of contact

Telephone Telephone number

Mobile Mobile phone number

Email Email address

Fax Fax number

Address

Address New

Address Line 1 10 Main Road

Address Line 2 Main Town

Address Line 3 Main City

Address Line 4 KZN

Address Line 5 Address Line 5

Post Code MAIN001

Country South Africa

CRM Info

* Main Contact?

CRM Role Yes

Send SMS No

Contact Picture

Contact Parent The manager

Accepts Sales Calls

Send Email

Submit Options

Show customer after save

Save

CRM ROLE

1. Hover over the **CRM Role** field to reveal a drop-down arrow. Click on this arrow to display a **Contact Type/Role** list.
2. Select from this list the specific role that this contact holds in their company. In this example, **Buying Officer** is selected.

CRM Example Company
Abigail Milne

Save Contact

Customer	* Customer Search King Enterprises	
Customer Details	* Name King Enterprises Holding company Type Legal Main Salesman Abigail Milne Website www.kingenterprises.co.za Phone 0123456789 Reg. No 01020304 VAT No 111222333 Reporting Area Durban * Rank Silver (Call cycle: 60)	
+ More Details		
Contact Info	Title Title of contact * First Name Jason * Last Name King Preferred A name the contact prefers Other emails Other email addresses separated with semi-colons Description Any narrative description Telephone Telephone number Mobile Mobile phone number Email Email address Fax Fax number Birthday Birthday of contact	
Address	Address New Address Line 1 10 Main Road Address Line 2 Main Town Address Line 3 Main City Address Line 4 KZN Address Line 5 Address Line 5 Post Code MAIN001 Country South Africa	
CRM Info	* Main Contact? Yes CRM Role <input type="checkbox"/> Send SMS <input type="checkbox"/> Contact Picture Contact Parent The manager Accepts Sales Calls <input checked="" type="checkbox"/> Send Email <input type="checkbox"/>	
Submit Options	Show customer after save	

Accounts Manager
 Buying Officer
 CEO
 Chief Financial Officer
 End user
 Product Advisor
 Salesman

Save

1. **Send SMS** : Select this check box if this contact accepts SMS communication.
2. **Accept Sales Calls** : Select this check box if this contact accepts sales calls.
 - **Note** : This check box is auto selected by the system, you can un-check it, if required.
3. **Send Email** : Select this check box if this contact accepts Email communication.

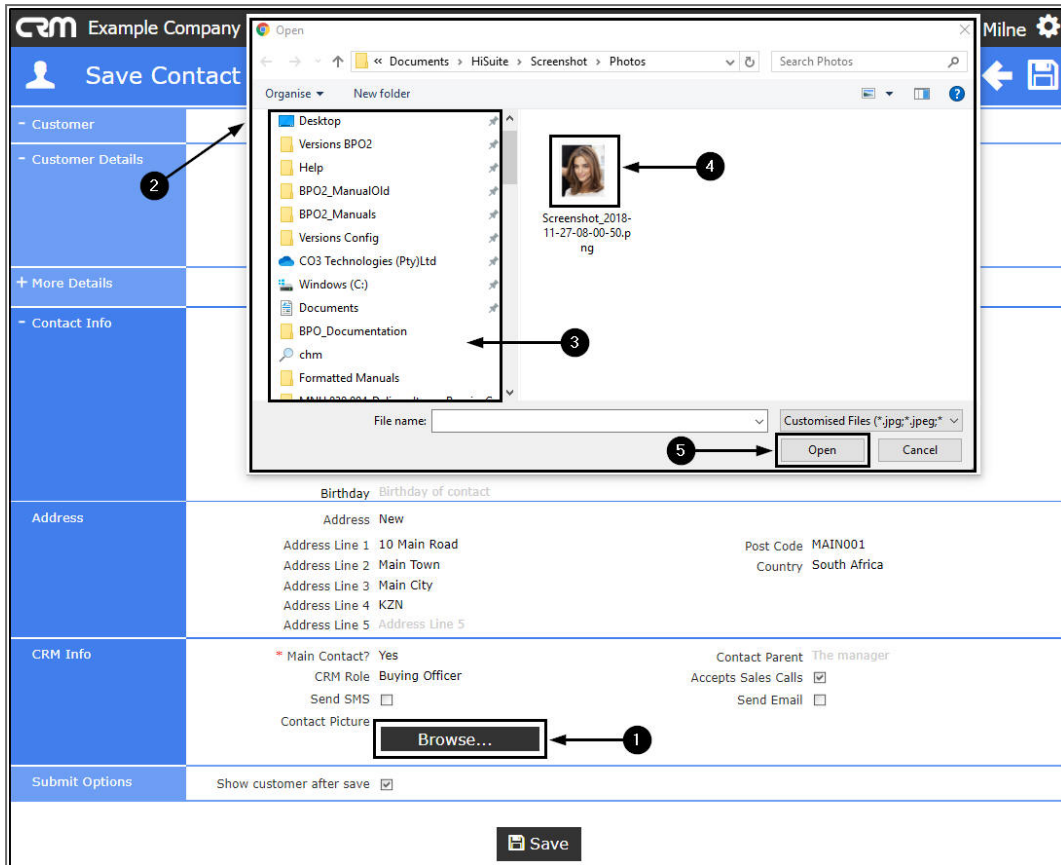
CRM Example Company
Abigail Milne

Save Contact

Customer	* Customer Search King Enterprises		
Customer Details	* Name King Enterprises Holding company Type Legal Main Salesman Abigail Milne Website www.kingenterprises.coza Phone 0123456789 Reg. No 01020304 VAT No 111222333 Reporting Area Durban * Rank Silver (Call cycle: 60)		
+ More Details			
Contact Info	<table style="width: 100%; border: none;"> <tr> <td style="width: 50%; border: none;"> Title Title of contact * First Name Jason * Last Name King Preferred A name the contact prefers Other emails Other email addresses separated with semi-colons Description Any narrative description Birthday Birthday of contact </td> <td style="width: 50%; border: none;"> Telephone Telephone number Mobile Mobile phone number Email Email address Fax Fax number </td> </tr> </table>	Title Title of contact * First Name Jason * Last Name King Preferred A name the contact prefers Other emails Other email addresses separated with semi-colons Description Any narrative description Birthday Birthday of contact	Telephone Telephone number Mobile Mobile phone number Email Email address Fax Fax number
Title Title of contact * First Name Jason * Last Name King Preferred A name the contact prefers Other emails Other email addresses separated with semi-colons Description Any narrative description Birthday Birthday of contact	Telephone Telephone number Mobile Mobile phone number Email Email address Fax Fax number		
Address	Address New Address Line 1 10 Main Road Address Line 2 Main Town Address Line 3 Main City Address Line 4 KZN Address Line 5 Address Line 5 Post Code MAIN001 Country South Africa		
CRM Info	<table style="width: 100%; border: none;"> <tr> <td style="width: 50%; border: none;"> * Main Contact? Yes CRM Role Buying Officer Send SMS <input type="checkbox"/> 1 Contact Picture <input type="button" value="Browse..."/> </td> <td style="width: 50%; border: none;"> Contact Parent The manager Accepts Sales Calls <input checked="" type="checkbox"/> 2 Send Email <input type="checkbox"/> 3 </td> </tr> </table>	* Main Contact? Yes CRM Role Buying Officer Send SMS <input type="checkbox"/> 1 Contact Picture <input type="button" value="Browse..."/>	Contact Parent The manager Accepts Sales Calls <input checked="" type="checkbox"/> 2 Send Email <input type="checkbox"/> 3
* Main Contact? Yes CRM Role Buying Officer Send SMS <input type="checkbox"/> 1 Contact Picture <input type="button" value="Browse..."/>	Contact Parent The manager Accepts Sales Calls <input checked="" type="checkbox"/> 2 Send Email <input type="checkbox"/> 3		
Submit Options	Show customer after save <input checked="" type="checkbox"/>		

LINK A CONTACT PICTURE

1. Click on **Browse...**
2. An **Open** screen will pop up.
3. Double click on the file that contains the image.
4. Click on the image.
5. Click on **Open**.



1. The contact picture will be inserted into this **CRM Info** frame

CONTACT PARENT

2. Click in this field and type in the **'report to'** person for this contact e.g. the Buying Manager

- Note:** If there are Contact Parents set up against this customer, a drop-down arrow will appear as you hover over this field. Click on this arrow to display a list of contact parents from which you can make a selection.

CRM Example Company
Abigail Milne

+ Save Contact ←

Customer	* Customer Search King Enterprises
Customer Details	* Name King Enterprises Holding company Type Legal Main Salesman Abigail Milne Website www.kingenterprises.co.za Phone 0123456789 Reg. No 01020304 VAT No 111222333 Reporting Area Durban * Rank Silver (Call cycle: 60)
+ More Details	
Contact Info	Title Title of contact * First Name Jason * Last Name King Preferred A name the contact prefers Other emails Other email addresses separated with semi-colons Description Any narrative description Birthday <input checked="" type="checkbox"/> birthday of contact
Address	Address New Address Line 1 10 Main Road Address Line 2 Main Town Address Line 3 Main City Address Line 4 KZN Address Line 5 Address Line 5 Post Code MAIN001 Country South Africa
CRM Info	* Main Contact? Yes CRM Role Buying Officer Send SMS <input type="checkbox"/> Contact Picture <input type="text"/> Contact Parent The manager Accepts Sales Calls <input checked="" type="checkbox"/> Send Email <input type="checkbox"/>
Submit Options	Show customer after save <input checked="" type="checkbox"/>

Save

SUBMIT OPTIONS

SHOW CUSTOMER AFTER SAVE

1. This check box is auto selected. You can un-select it if you do not wish to view the customer details in the Homepage after you have saved this contact.

SAVE NEW CONTACT

2. Click on **Save**.

CRM Example Company
Abigail Milne

Save Contact

- Customer	* Customer Search King Enterprises
- Customer Details	<div style="display: flex; justify-content: space-between;"> <div> <p>* Name King Enterprises</p> <p>Holding company</p> <p>Type Legal</p> <p>Main Salesman Abigail Milne</p> <p>Website www.kingenterprises.coza</p> <p>Phone 0123456789</p> </div> <div> <p>Reg. No 01020304</p> <p>VAT No 111222333</p> <p>Reporting Area Durban</p> </div> </div> <p>* Rank Silver (Call cycle: 60)</p>
+ More Details	
- Contact Info	<div style="display: flex; justify-content: space-between;"> <div> <p>Title Title of contact</p> <p>* First Name Jason</p> <p>* Last Name King</p> <p>Preferred A name the contact prefers</p> <p>Other emails Other email addresses separated with semi-colons</p> <p>Description Any narrative description</p> </div> <div> <p>Telephone Telephone number</p> <p>Mobile Mobile phone number</p> <p>Email Email address</p> <p>Fax Fax number</p> </div> </div> <p>Birthday Birthday of contact</p>
Address	<p>Address New</p> <p>Address Line 1 10 Main Road</p> <p>Address Line 2 Main Town</p> <p>Address Line 3 Main City</p> <p>Address Line 4 KZN</p> <p>Address Line 5 Address Line 5</p> <p>Post Code MAIN001</p> <p>Country South Africa</p>
CRM Info	<div style="display: flex; justify-content: space-between;"> <div> <p>* Main Contact? Yes</p> <p>CRM Role Buying Officer</p> <p>Send SMS <input type="checkbox"/></p> <p>Contact Picture <input type="button" value="Browse..."/></p> </div> <div> <p>Contact Parent The manager</p> <p>Accepts Sales Calls <input checked="" type="checkbox"/></p> <p>Send Email <input type="checkbox"/></p> </div> </div>
Submit Options	<p>Show customer after save <input checked="" type="checkbox"/> 1</p>

2

1. You will either return to the Homepage or Customer Homepage depending on your selection in the previous step.
2. If you selected to 'Show Customer After Save', then you will now be able to view the customer details (e.g. 12 Months Sales History) in this screen as well as customer-specific tiles that are not available in the Main Homepage.

CRM Example Company | Abigail Milne

Customer Dashboard (1)

Search

Description	Target	Existing Custmrs	New Custmrs
Phone call	10000	0	7
Email	0	0	1
Meeting	0	0	0
On Site inspection	0	0	0

Category	Value
Invoices	~8000.00
Orders	~8000.00
Quotes	~8000.00

Month	Value
Jul 2019	~2500.00
Aug 2019	~2500.00
Sep 2019	~2500.00
Oct 2019	~2500.00

King Enterprises - KIN0002

Trading Name: King Enterprises
 Registered Name: King Enterprises
 Description: Solicitors Firm, 3 sites.
 VAT No: 111222333
 Registration: 01020304
 Rank: Silver
 Website: <http://www.kingenterprises.co.za>
 Phone: 0123456789

50%

Created: 2019/06/28 11:55:01 AM

Month	Contract Income	Sales Revenue
July 2018	0.00	0.00
August 2018	0.00	0.00
September 2018	0.00	0.00
October 2018	0.00	0.00
November 2018	0.00	0.00
December 2018	0.00	0.00
January 2019	0.00	0.00
February 2019	0.00	0.00
March 2019	0.00	0.00
April 2019	0.00	0.00
May 2019	0.00	0.00
June 2019	0.00	0.00
July 2019	0.00	0.00

Navigation icons: create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, Rec.

(2) points to the '3rd party' icon.

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