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

CRM BASICS

SALES PERFORMANCE SUMMARY

The CRM Performance Summary will indicate your Sales <u>Target</u> vs. <u>Actual</u> over a monthly period.

This <u>time frame can be configured in BPO</u> according to your company requirements and split between current BPO clients and New Customers.

The Performance Types are:

- Cases
- Quotes
- Orders
- Invoices

**Ribbon Access:** Webpage - http://[servername]:[portno]/BPOCRM/User.aspx

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VIEW PERFORMANCE SUMMARY IN THE HOME PAGE

1. In the CRM **Homepage**,
2. You can view the **[ ] Month Performance** frame.

    Note: The amount of months that you can view in this frame is <u>configured in BPO</u>.

3. This frame will contain bars of up to 3 colours, reflecting the number of:

- **New** (orange)
- **Existing** (blue) and

- **Target** (pink) customers per performance type.

4. The Performance types are represented on the horizontal axis:

- **Cases**,
- **Invoices**,
- **Orders** and
- **Quotes**.

5. The values are represented on the vertical axis.
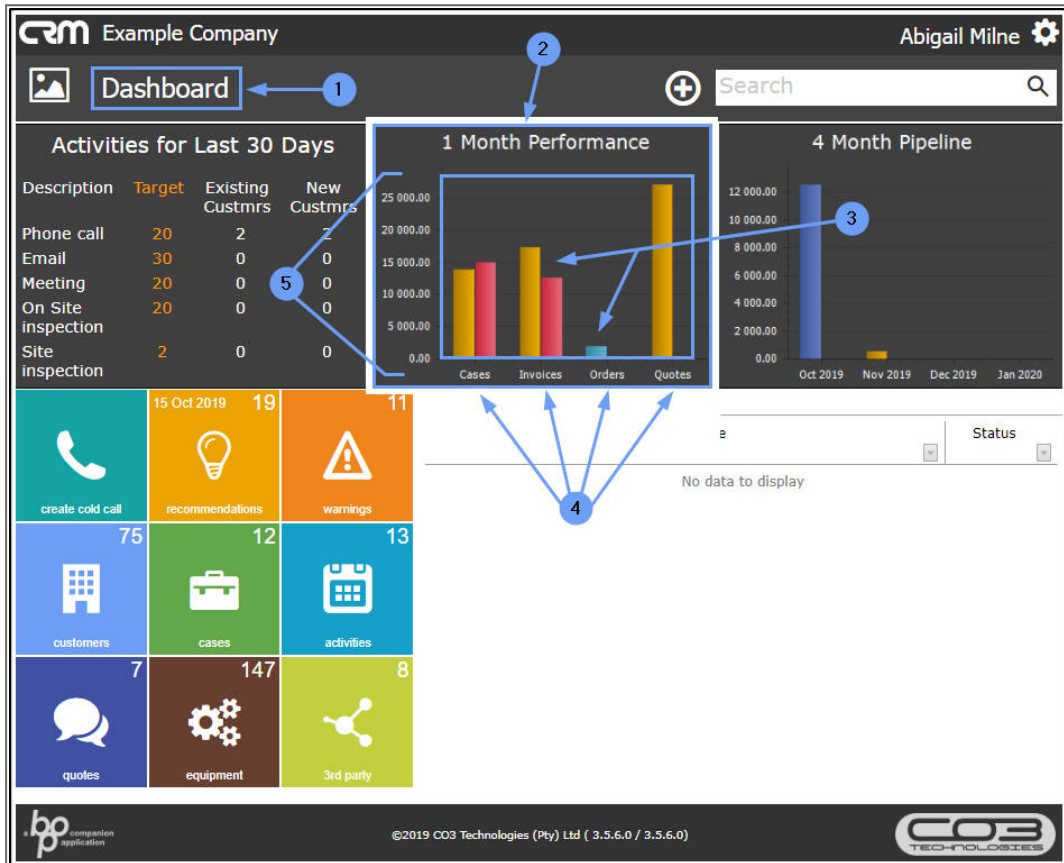
VIEW CASES MONTH PERFORMANCE

1. Hover over the **Cases** section of the bar chart to bring up the Cases information box.
2. Each type of Case value will be listed:

- New **Customers**:
- Existing **Customers**:
- Target:

with their corresponding **amount**.

- In this example, the New customers have a total caseload value of **13750**, the Existing customers currently have **zero** caseload value, the Target for this salesman is a total caseload value of **15000** per 1 month.
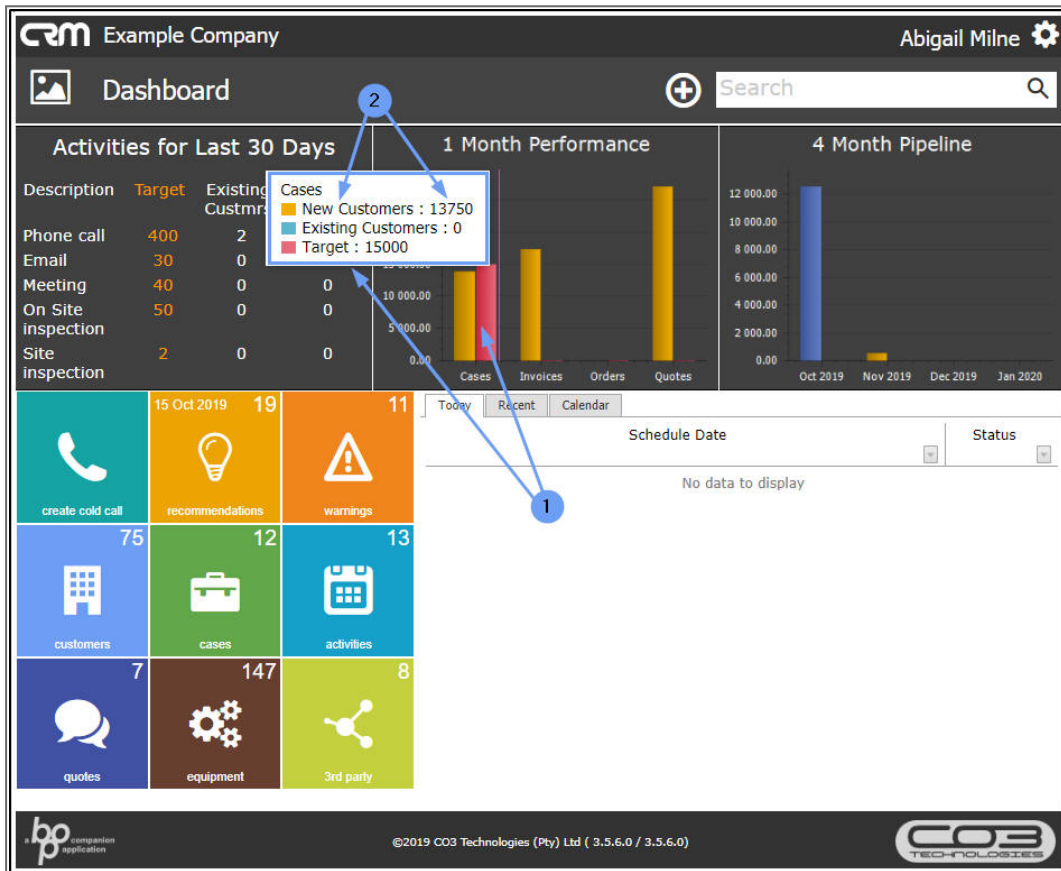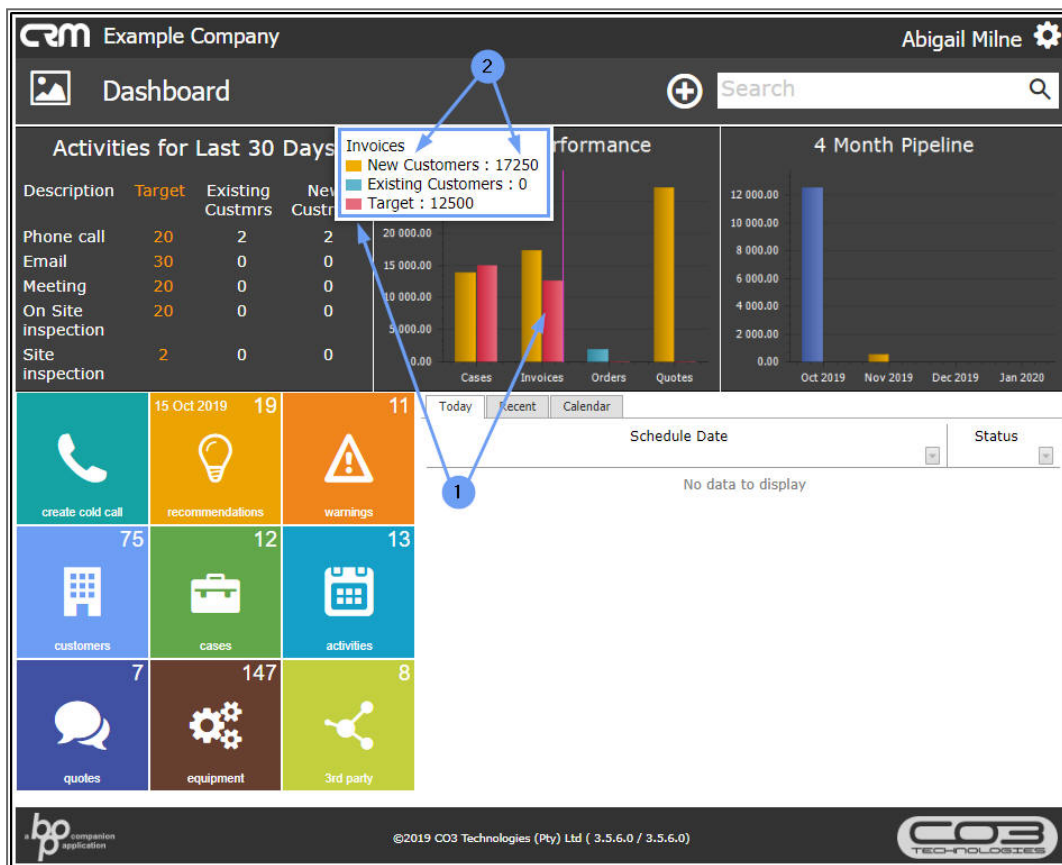

VIEW INVOICES MONTH PERFORMANCE

1. Hover over the **Invoices** section of the bar chart to bring up the Invoices information box.

2. Each type of Invoice value will be listed:

- New **Customers**:
- Existing **Customers**:
- Target:

with their corresponding **amount**.

- In this example, the New customers have a total invoice value of **17250**, the Existing customers currently have **0 (zero)** invoice value, the Target for this salesman is a total invoice value of **12500** per **1** month.
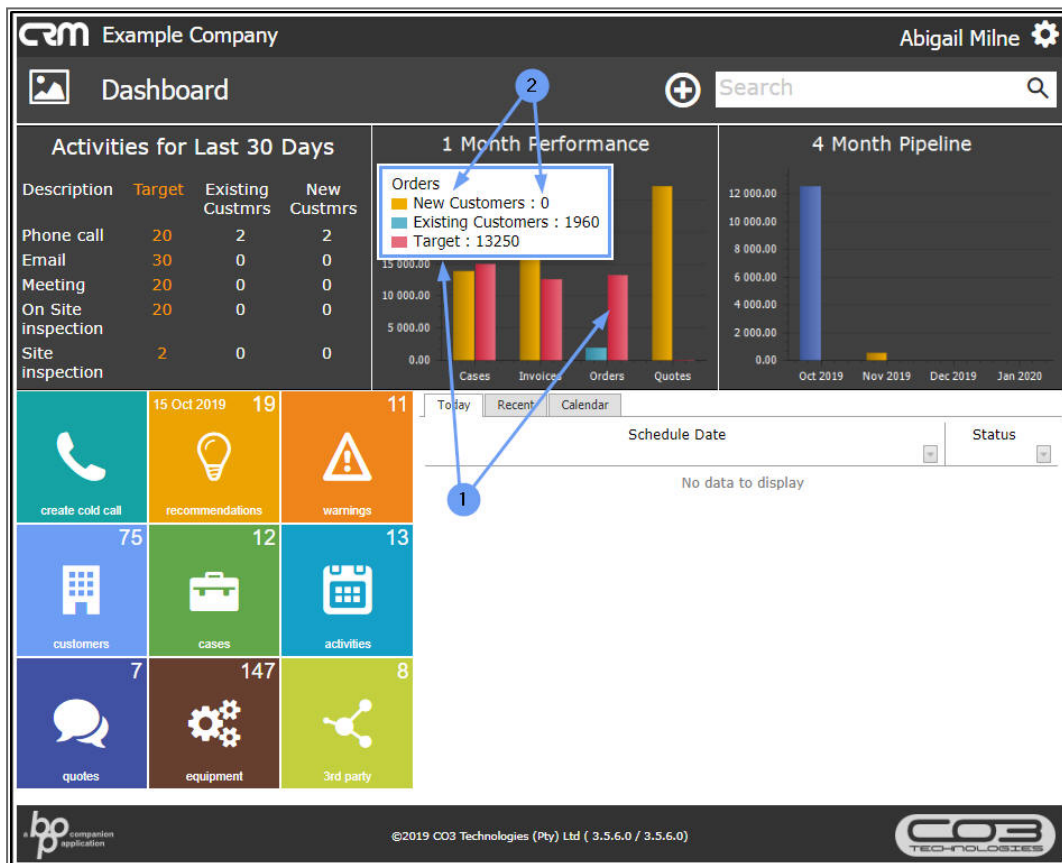
VIEW ORDERS MONTH PERFORMANCE

1. Hover over the **Orders** section of the bar chart to bring up the Orders information box.

2. Each type of Order value will be listed:

   - New **Customers**:
   - Existing **Customers**:
   - Target:

   with their corresponding **amount**.

   - In this example, the New customers have a total order value of **0 (zero)**, the Existing customers currently have **1960** order value, the Target for this salesman is a total order value of **13250** per 1 month.

VIEW QUOTES MONTH PERFORMANCE

1. Hover over the **Quotes** section of the bar chart to bring up the Quotes information box.

2. Each type of Quote value will be listed:

   - New **Customers**:
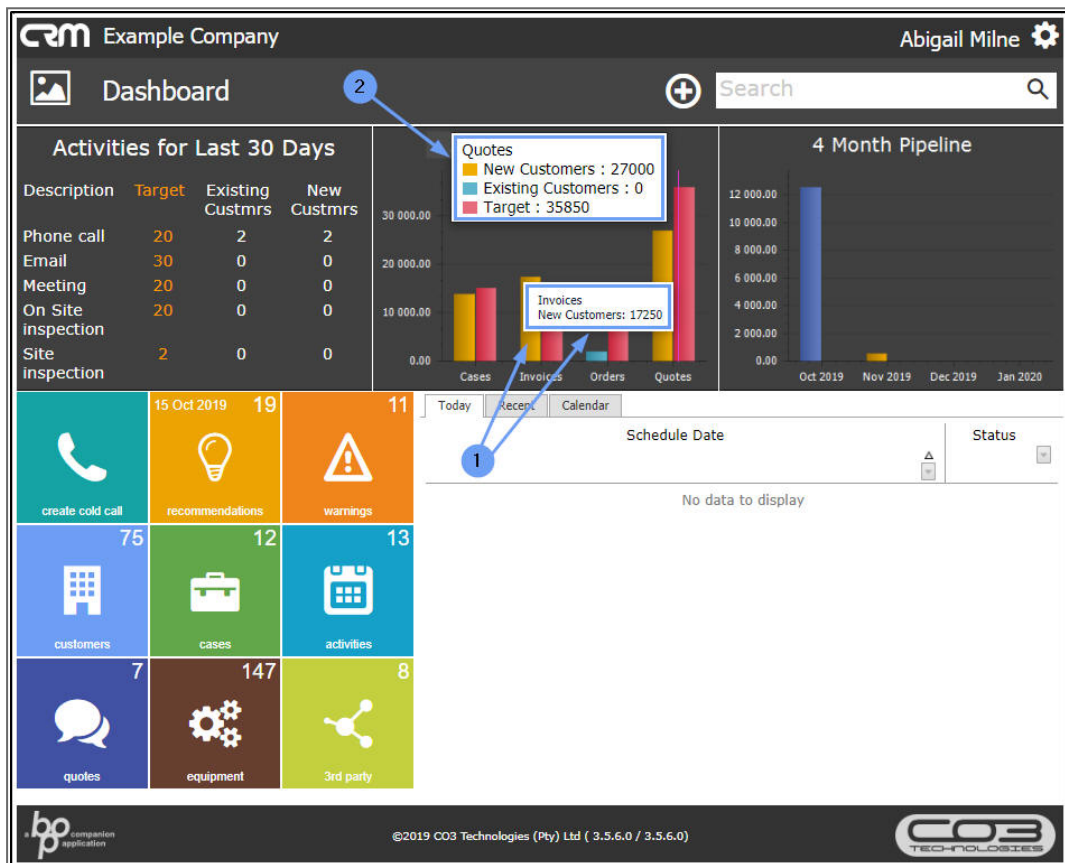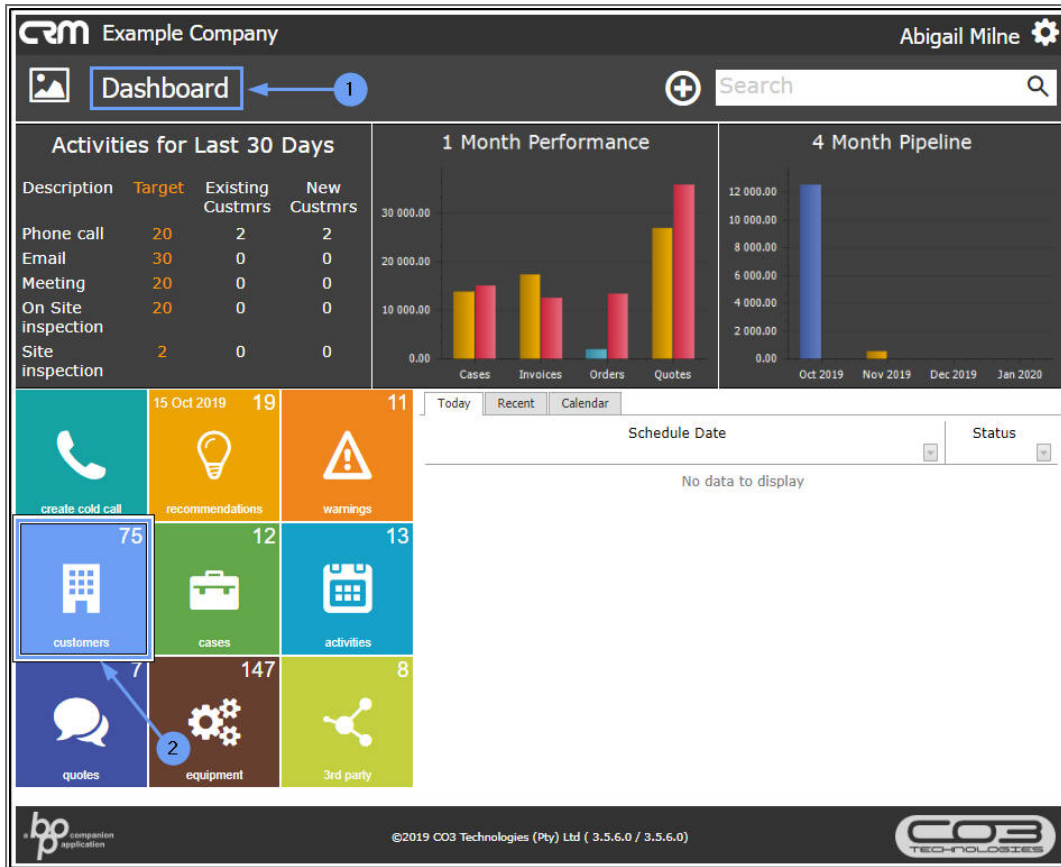   - Existing **Customers**:
   - Target:

   with their corresponding **amount**.

   - In this example, the New customers have a total quote value of **27000**, the Existing customers currently have **0 (zero)** quote value, the Target for this salesman is a total quote value of **35850** per 1 month.
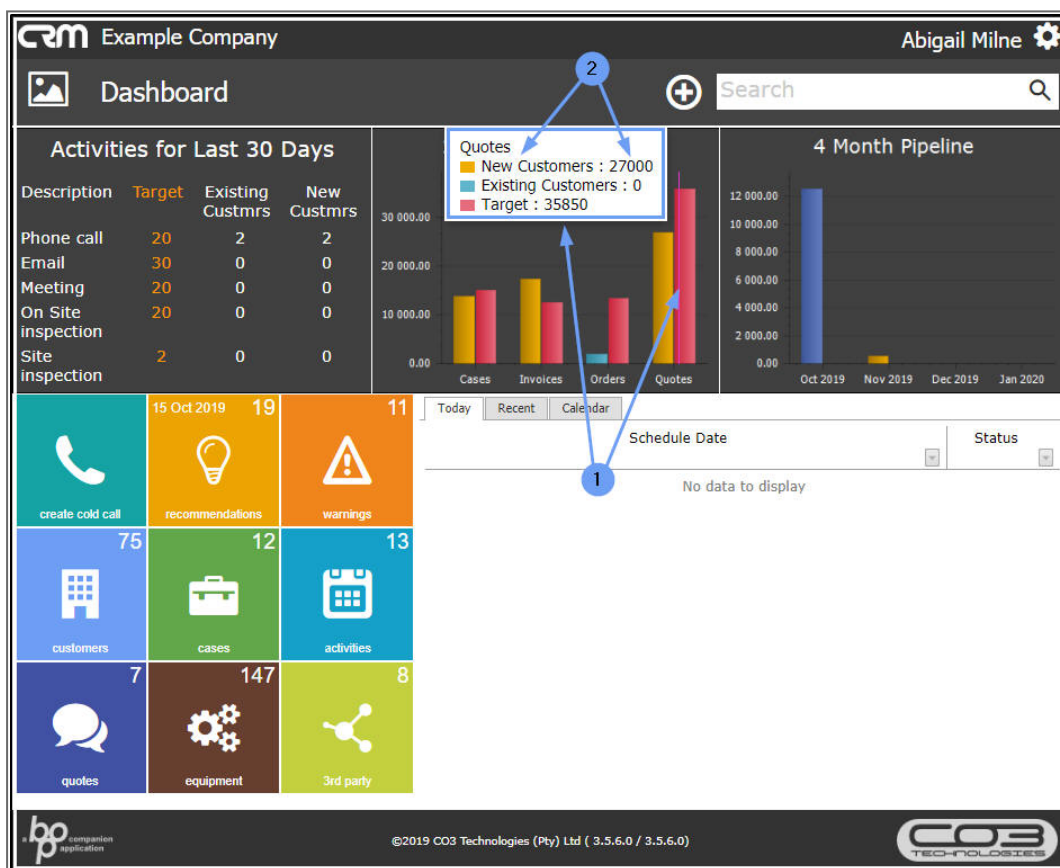
VIEW INDIVIDUAL PERFORMANCE TYPE SUMMARY

1. **Single click** on any <u>individual</u> bar in the chart to display an information box for that particular performance type <u>and</u> customer type.
   - In this example, the **Invoices: New Customers** type bar was selected.
2. You will still be able to hover over other parts of the bar chart to bring up to bring up the relevant performance type information box.

VIEW PERFORMANCE SUMMARY IN THE CUSTOMER HOMEPAGE

1. In the **Homepage**,
2. Click on the **Customers** tile.

1. The **Customers** listing page will open.
2. Click on the selected **Customer icon** in the **View** column.

1. The selected **Customer** homepage will open.
2. Here you can view the **[ ] Month Performance** chart.

You can follow the same processes as set out above to:

- View the **Cases** Performance Summary
- View the **Invoices** Performance Summary
- View the **Orders** Performance Summary
- View the **Quotes** Performance Summary
- View the **Individual** Performance Type Summary

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