

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

CRM BASICS

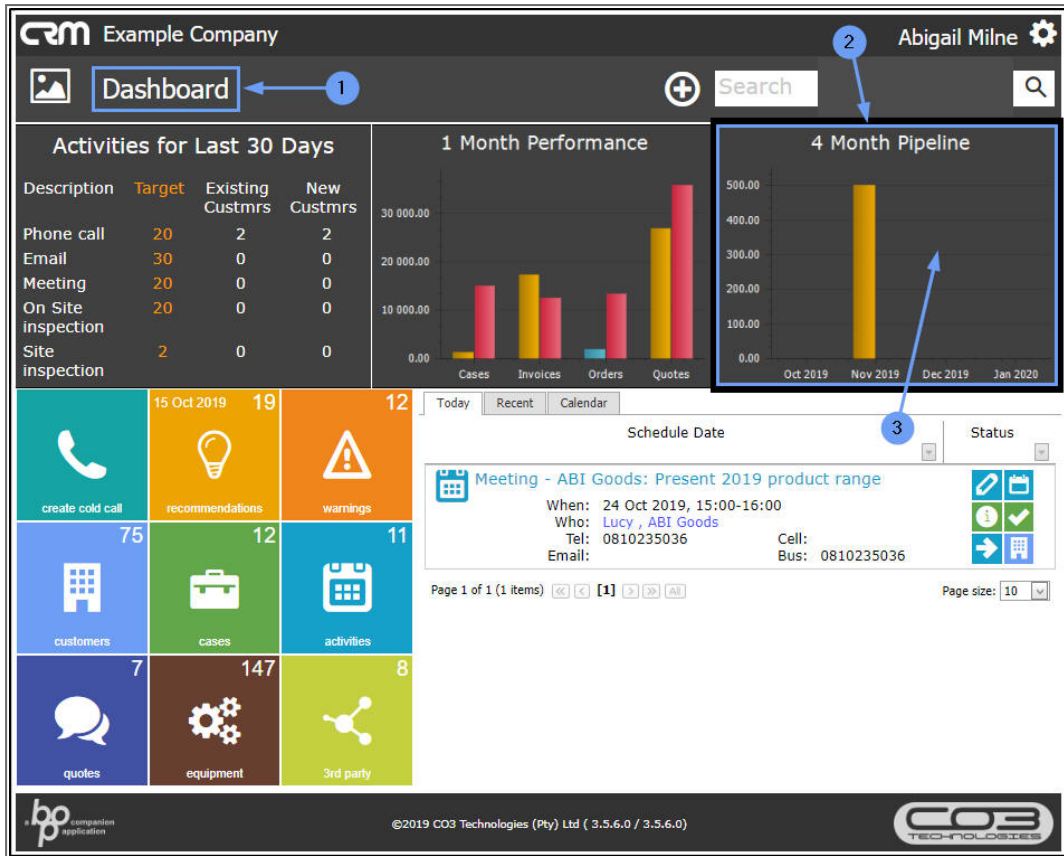
3 MONTH PIPELINE SUMMARY

In this frame you can view a graph of your Pipeline based on your active Cases. Pipeline months are set to 3 months by default, but this can be con-figured as per your company requirements. VAT is not displayed in the pipeline.

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

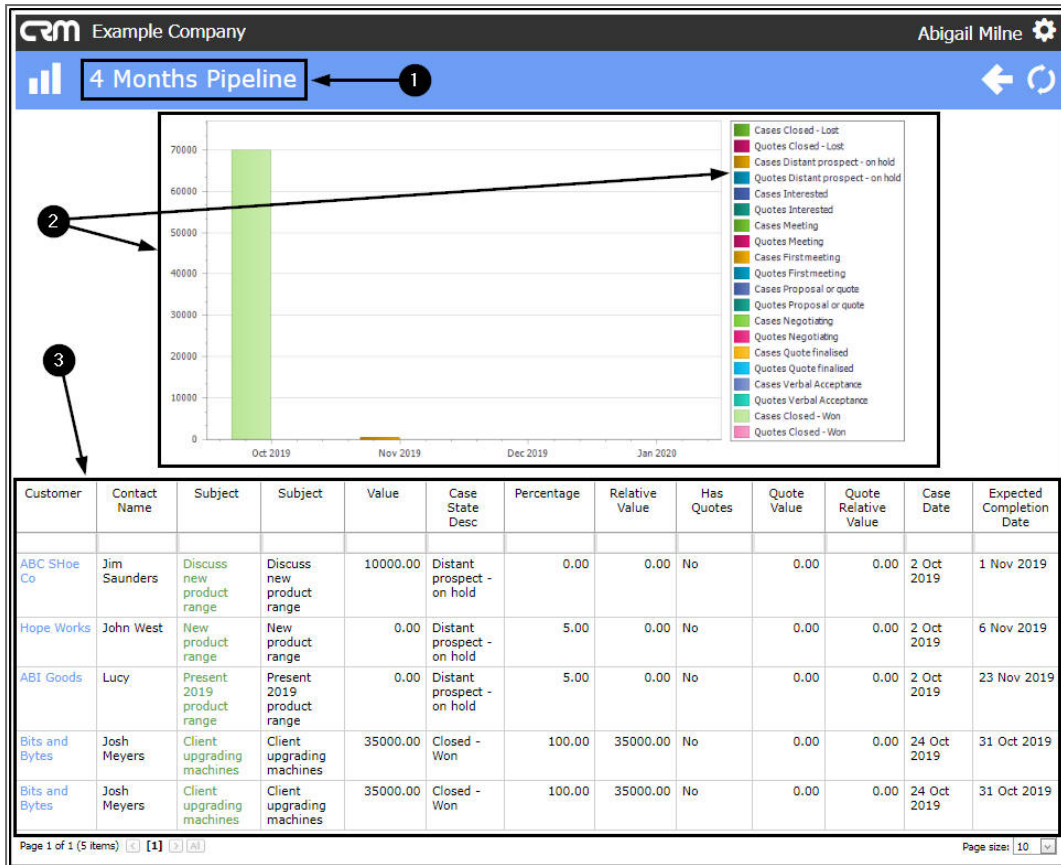
VIEW PIPELINE IN HOMEPAGE

1. In the CRM **Homepage**,
2. you can view the [] **Month Pipeline** frame.
 - **Note:** Pipeline months are set to 3 months by default, but can be configured as per your company requirements. In this example, the pipeline months have been set to **4**.
3. Click anywhere in this frame.



VIEW PIPELINE REPORT PAGE

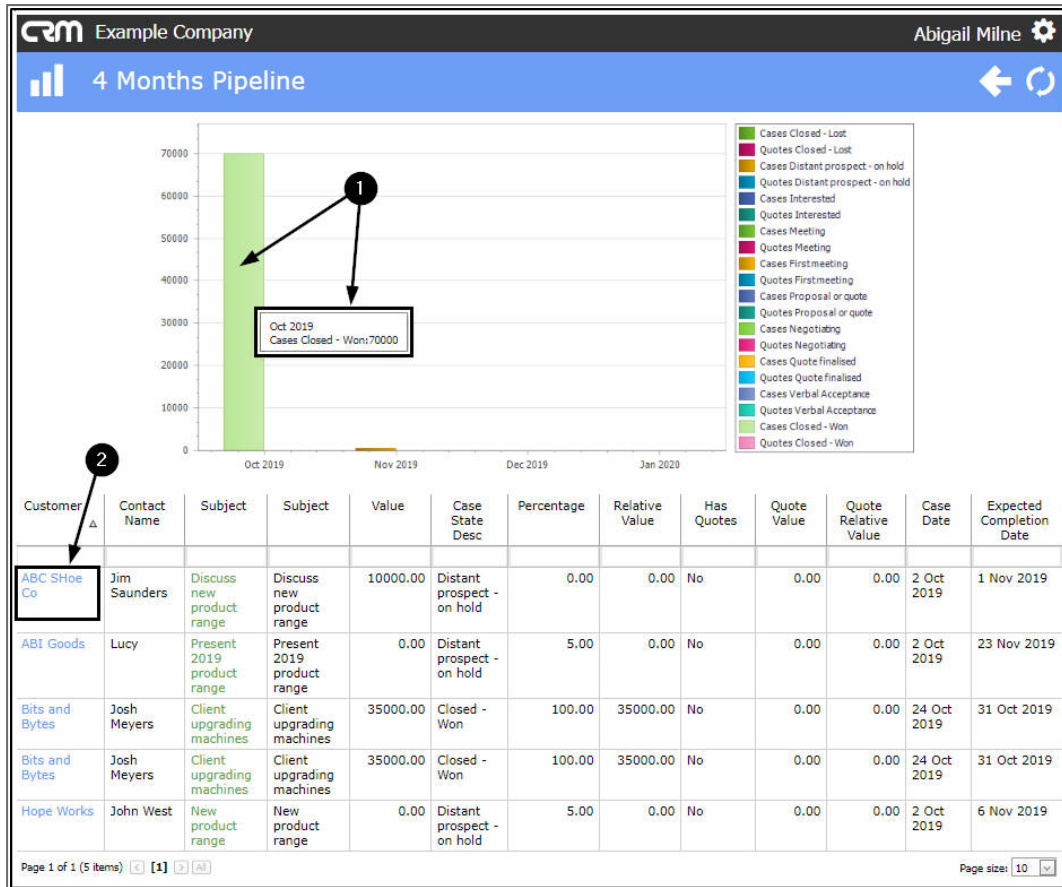
1. A [] Months Pipeline report page will open.
2. Here you can view the enlarged **bar graph** with corresponding **key code**,
3. and a list of your **cases** with the pertinent **case information** displayed.



1. **Hover anywhere** over a selected bar in the chart to display a related **information box**.
 - In this example, the bar represents **Cases Closed - Won** and the amount is **7000**.

VIEW CUSTOMER FROM PIPELINE PAGE

2. Click on a **customer name** in the **Customer** column.



1. The **Customer Homepage** will open.

Refer to [Introduction to the Customer Homepage](#) for more information.

2. You can also view the [] Month Pipeline frame in this page.

3. Click on the **Back** arrow to return to the [] Months Pipeline page.

CRM Example Company | Abigail Milne

ABC SHoe Co

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Phone call	20	2	2
Email	30	0	0
Meeting	20	0	0
On Site inspection	20	0	0
Site inspection	2	0	0

1 Month Performance

Category	Value
Cases	~15,000.00
Invoices	~18,000.00
Orders	~12,000.00
Quotes	~28,000.00

4 Month Pipeline

Month	Value
Oct 2019	~500.00
Nov 2019	~500.00
Dec 2019	~500.00
Jan 2020	~500.00

ABC SHoe Co - ABCXYZ123

Trading Name
Registered Name
Description
VAT No: 9876543210
Rank: Gold
Website: http://
Phone:

8%

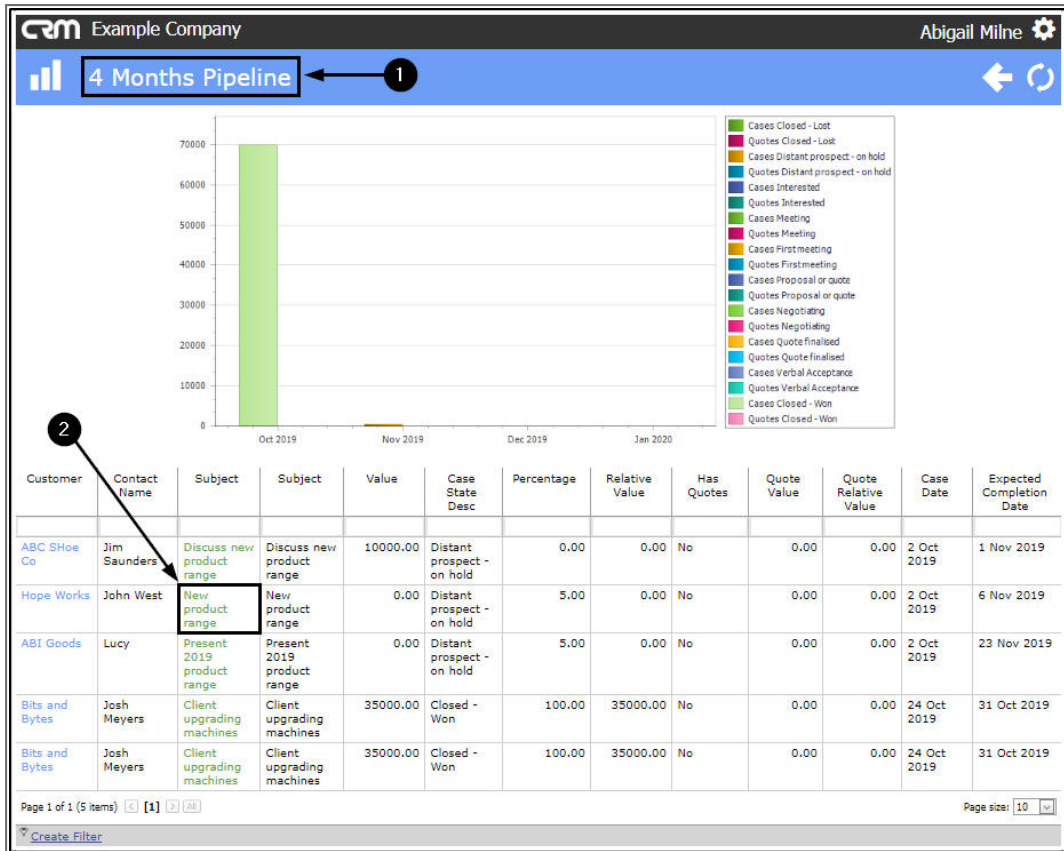
12 Months Sales History

Month	Contract Income	Sales Revenue
January 2018	~0.45	~0.45
February 2018	~0.42	~0.42
March 2018	~0.38	~0.38
April 2018	~0.35	~0.35
May 2018	~0.32	~0.32
June 2018	~0.28	~0.28
July 2018	~0.25	~0.25
August 2018	~0.22	~0.22
September 2018	~0.18	~0.18
October 2018	~0.15	~0.15
November 2018	~0.12	~0.12
December 2018	~0.08	~0.08
January 2019	~0.05	~0.05

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VIEW CASE FROM PIPELINE PAGE

1. In the [] Months Pipeline page,
2. Click on a **case** in the Case **Subject** column.



1. The **Save Case** page will open.

Refer to **Introduction to Cases** for more information.

Either,

2. Click on the **Customer icon** to return to the Customer Dashboard (Home page),
3. or click on the **Back** button,
4. or the **left arrow** to return to the previous page.

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main form is for a 'Case' with the following details:

- * Customer: Hope Works
- * Contact: John West
- * Salesman: Abigail Milne
- * Subject: New product range

Information relating to the case:

- * Value: 0.0000
- Case Type: New Deal
- Case Date: 2 Oct 2019
- Source Type: The type of source
- Expected Completion: 6 Nov 2019

Attachments: Attached files (Browse...)

Related Customers: Hope Works - HOP001

Case State: Distant prospect - on hold (5%)
Percentage: 5%

Navigation and Action Elements:

- 1: Save Case button
- 2: Back, Grid, and Save icons
- 3: Back, Grid, and Save icons (repeated)
- 4: Browser back arrow

Bottom of the page features a 'Save' button.

CRM.000.009

