

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

CRM BASICS

WARNINGS

Warnings are notifications of **overdue** activities, that can be directly actioned from the Warnings page using the Activity Action buttons.

A full list of warnings for all Customers can be accessed from the Homepage as set out below.

Client-specific warnings can be accessed from the from the Customer Homepage.

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

ACCESS WARNINGS FROM HOME PAGE

1. In the **Dashboard** (Home page),
2. Click on the **Warnings** tile.
3. **Note:** The number in the top right of this tile indicates how many warnings are pending in total for all customers.



WARNINGS PAGE – ALL CUSTOMERS

1. The **Warnings** page will open.
2. Here you can view a list of all the warnings, for all customers - where you have activities pending.

LIST OF ACTIVITIES PENDING

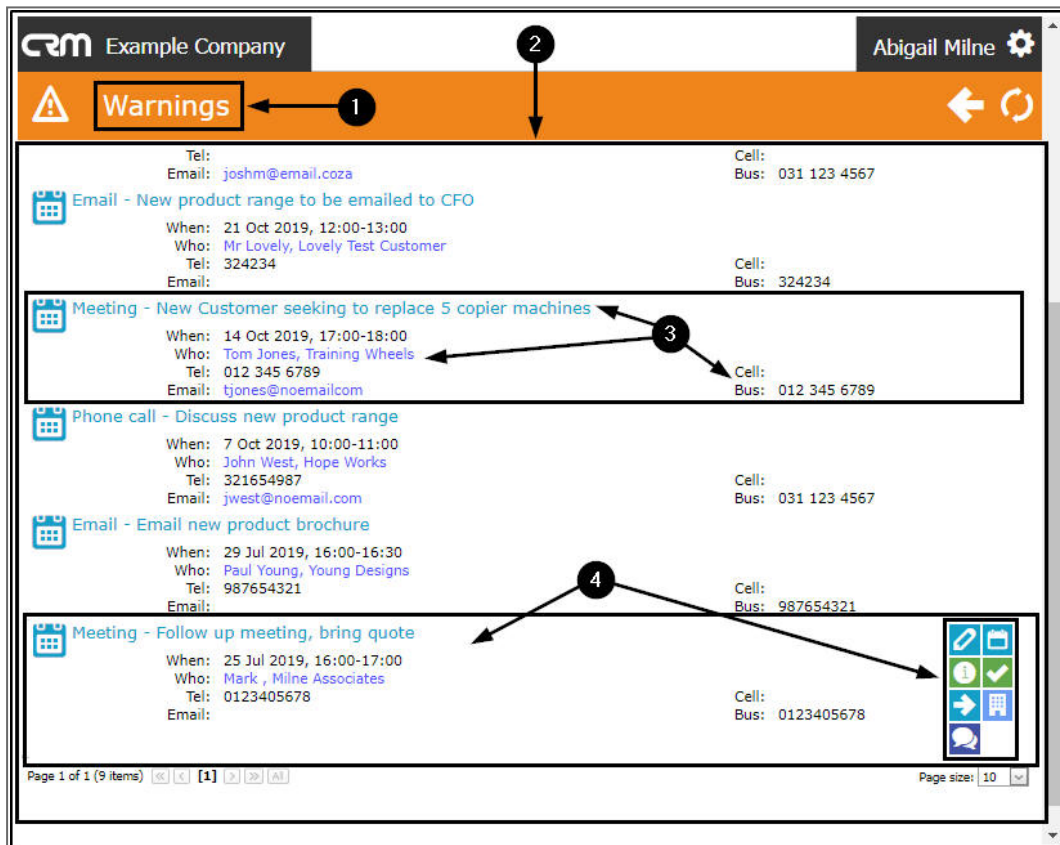
3. Each warning lists:
 - The activity **subject**
 - **When** the activity was scheduled for
 - **Who** the activity was scheduled with
 - **Contact details** for the activity:

- Tel:
- Email:
- Cell:
- Business No:

ACTIVITY ACTION BUTTONS

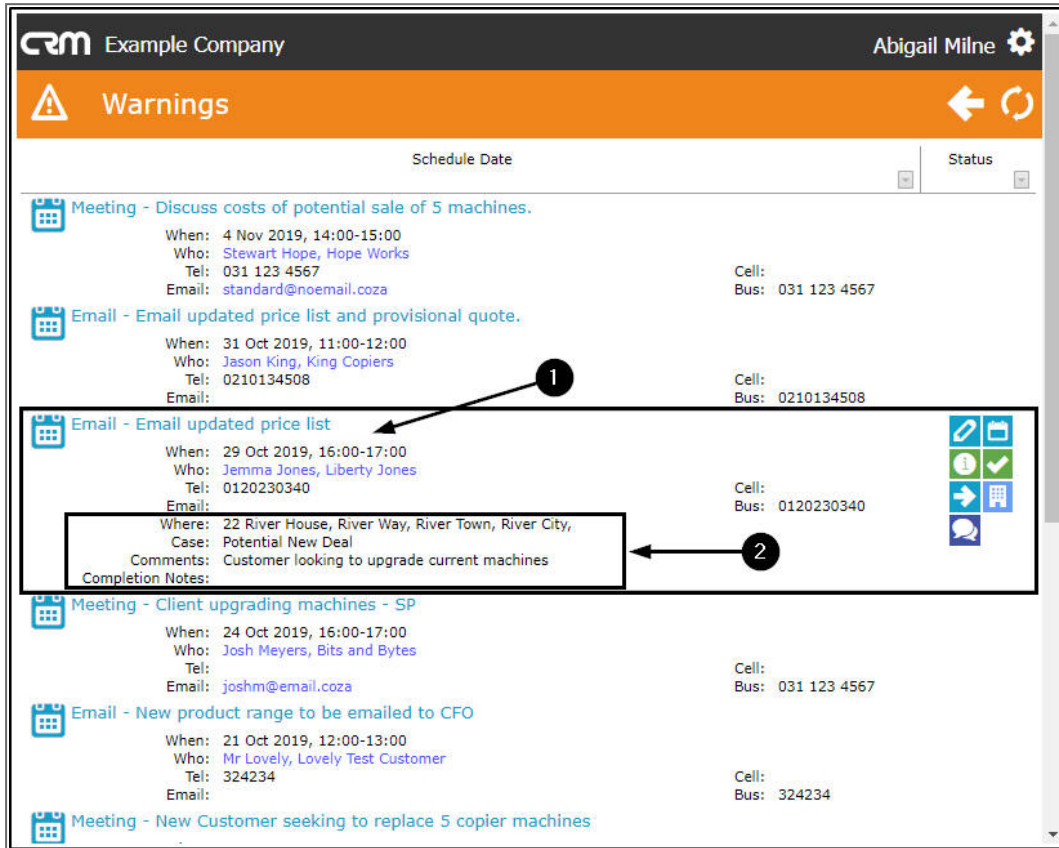
4. Hover over any activity to reveal the Activity **Action Buttons**:

- **View / Edit this Activity**
- **Reschedule this Activity**
- **View Case info and history**
- **Close this case**
- **Next Action** (close current Activity and create new Activity)
- **View customer**
- **New Quote**



VIEW ACTIVITY SUMMARY

1. **Single click** on any Activity.
2. To access a **summary** of the Activity information.



SELECT SCHEDULE DATE

You can select / change the **Schedule Date** parameters.

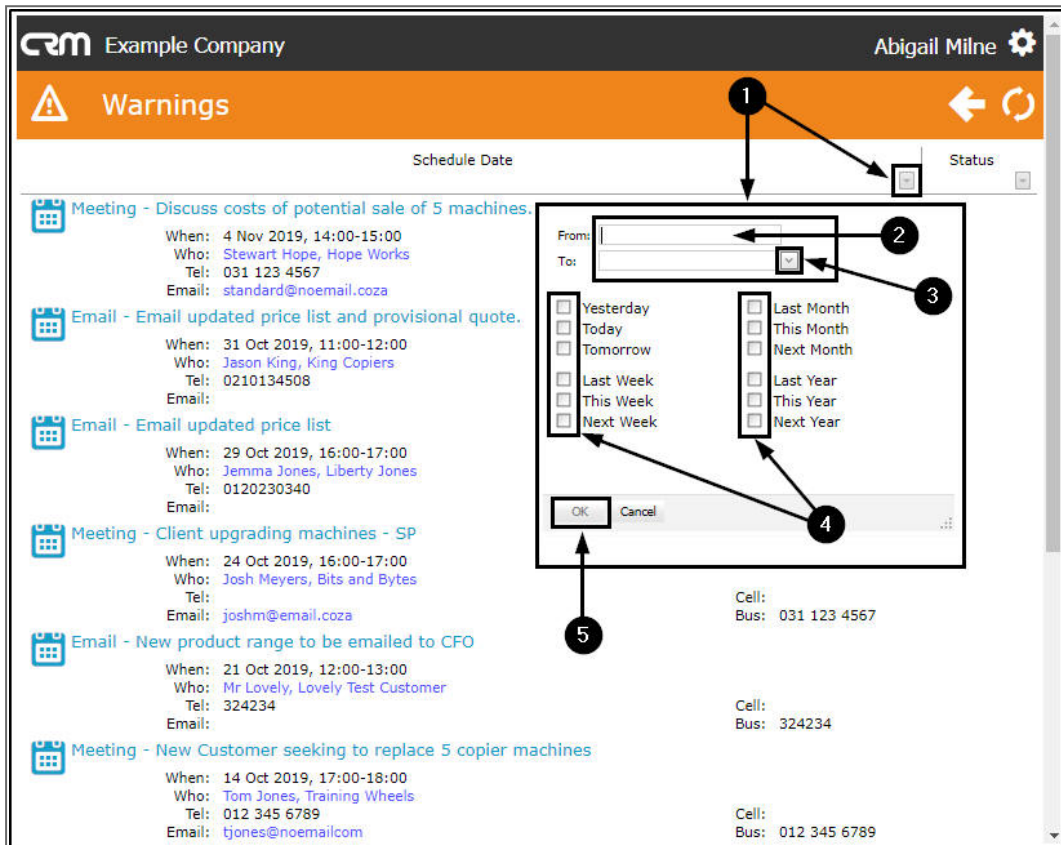
1. Click on the **drop-down arrow** in the **Schedule Date** frame to display the Select Schedule screen.

Either

2. **Type in** the date parameters in the **From** and **To** fields,

Or

3. Click on the **drop-down arrows** in the From and To fields and use the **calendar function** to select the dates.
4. Alternatively, select the **check boxes** that correlate to the time periods that you wish to view. For example, you could select **This Week** and **Last Week**.
5. When you are happy with your selections, click on **OK**.



1. The screen will **refresh** to display only the warnings in the selected date parameters.

SELECT STATUS

You can also select to view the Warnings that are in a particular **Status**.

- Click on the **drop-down arrow** in the **Status** frame to display the Select Schedule screen.

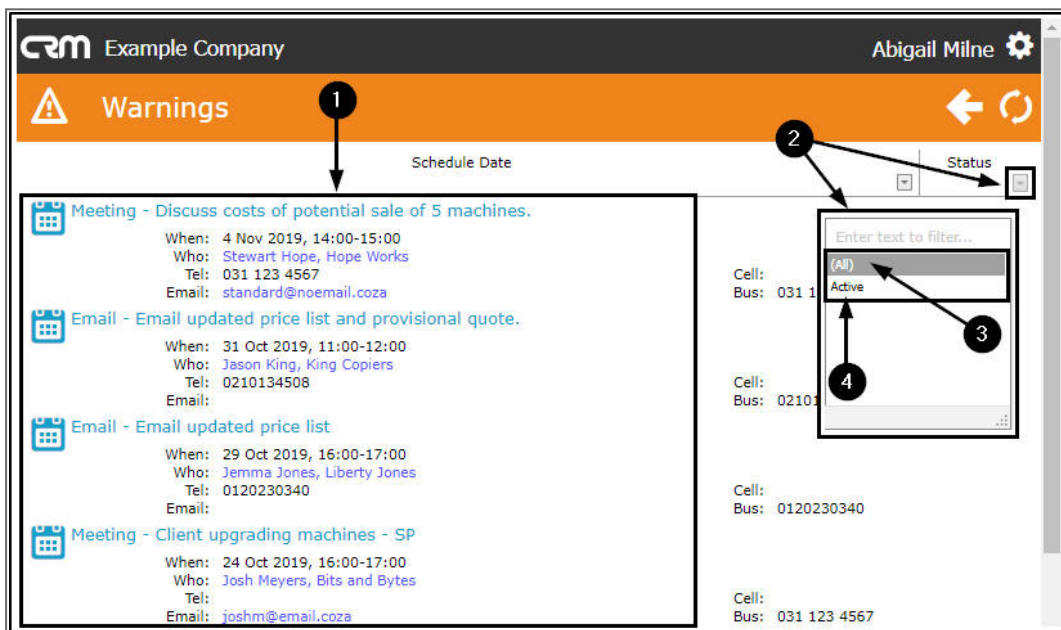
Either

- Select **All** (to view all the warnings pending),

Or

- Select **Active** (to view only the Active warnings).

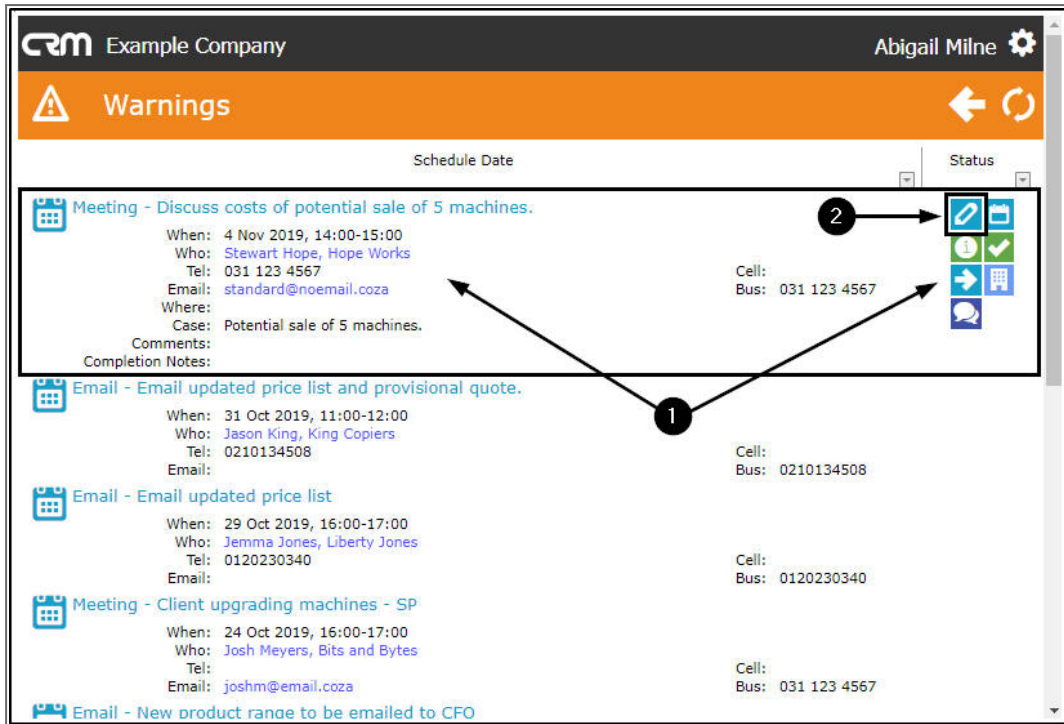
As you click on your choice, the page will **refresh** to display the results of your selection.



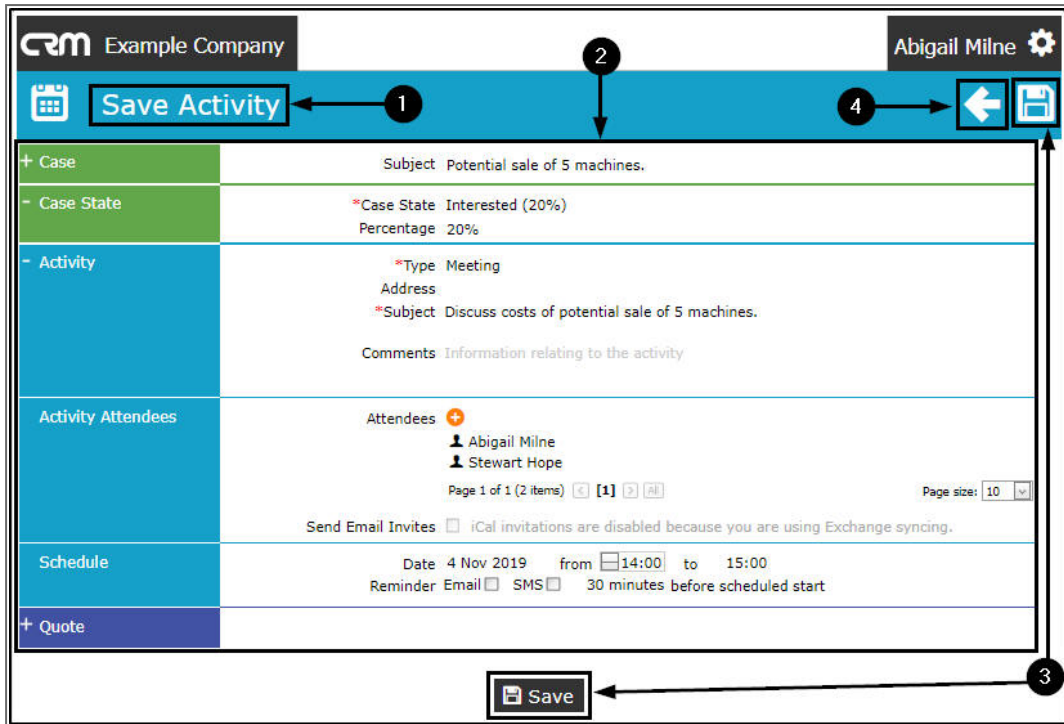
ACTIVITY ACTION BUTTONS PROCESSING

VIEW/EDIT THIS ACTIVITY

- Hover over an activity, to reveal the Activity **Action buttons**.
- Click on the **View/Edit this Activity** button.

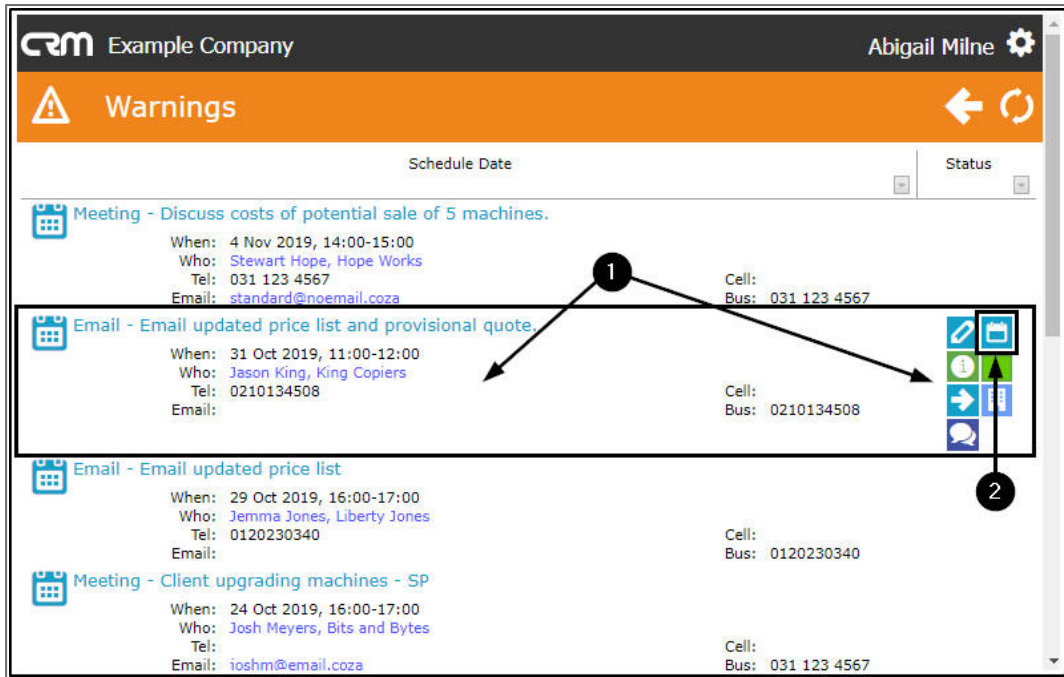


1. The **Save Activity** page will open.
2. View and/or Update the Activity details as required.
 - For more information regarding this page refer to **View/Edit an Activity**.
3. Click on **Save** to keep your changes,
4. or the **Back** button to return to the Warnings page.

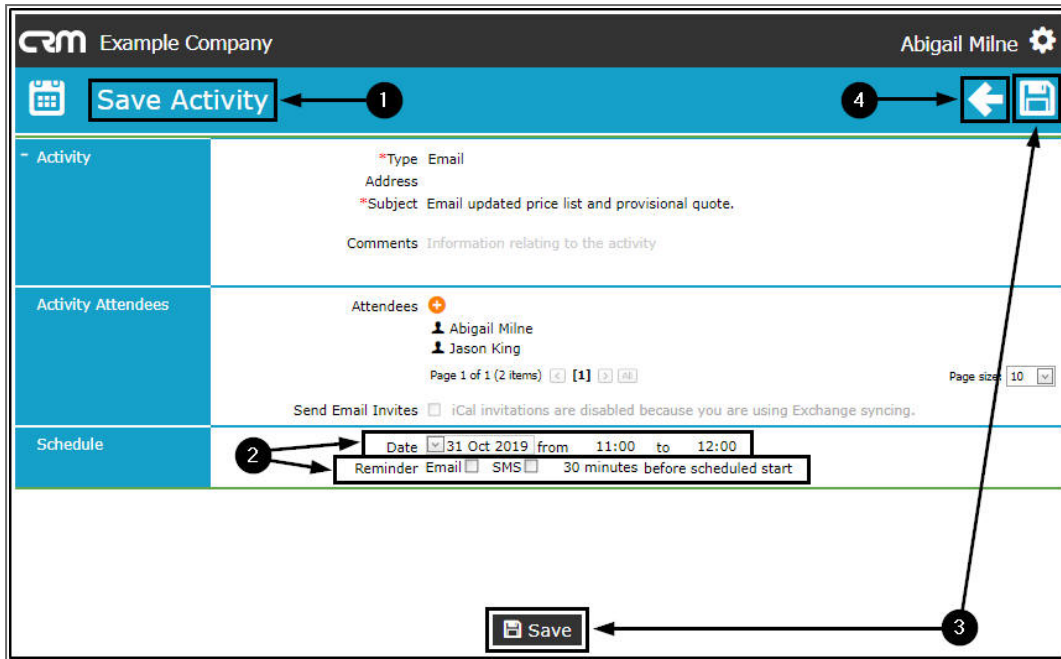


RESCHEDULE ACTIVITY

- In the Warnings page, hover over an activity, to reveal the **Action buttons**.
- Click on the **Reschedule this Activity** icon

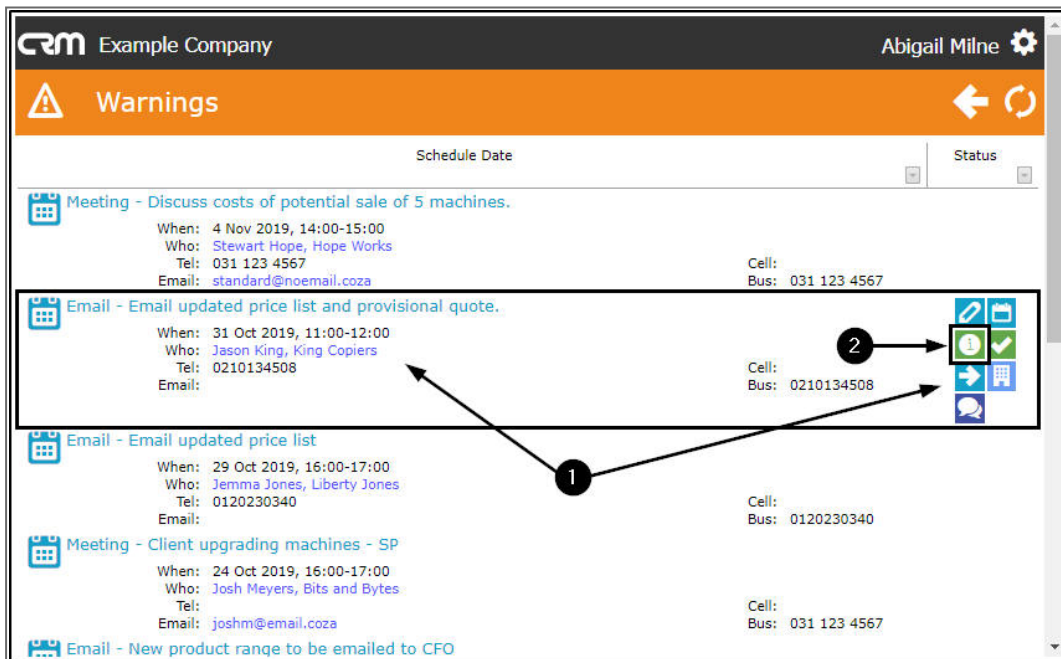


1. The **Save Activity** page will open.
2. Reset the **Activity Schedule Date** and **Reminder** details, as required.
 - For more information regarding this page refer to [Scheduling](#).
3. Click on **Save** to keep any changes made or
4. Click on **Back** to return to the **Warnings** listing page.

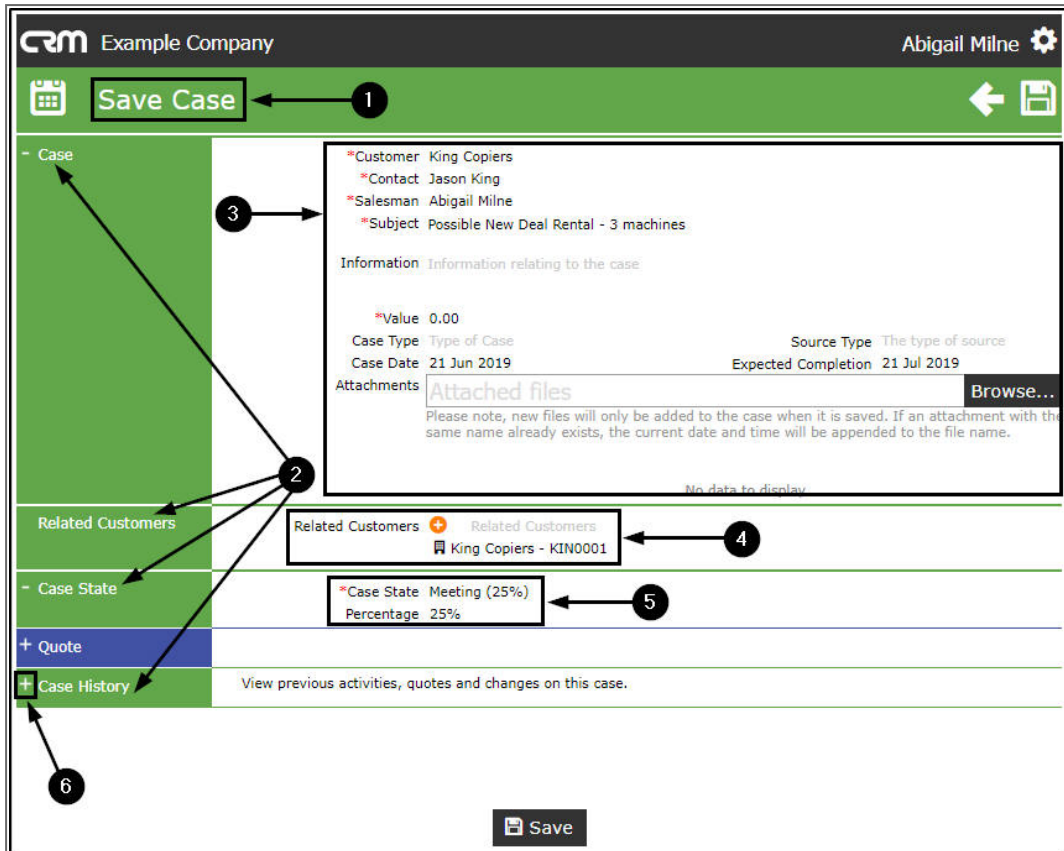


VIEW CASE INFO AND HISTORY

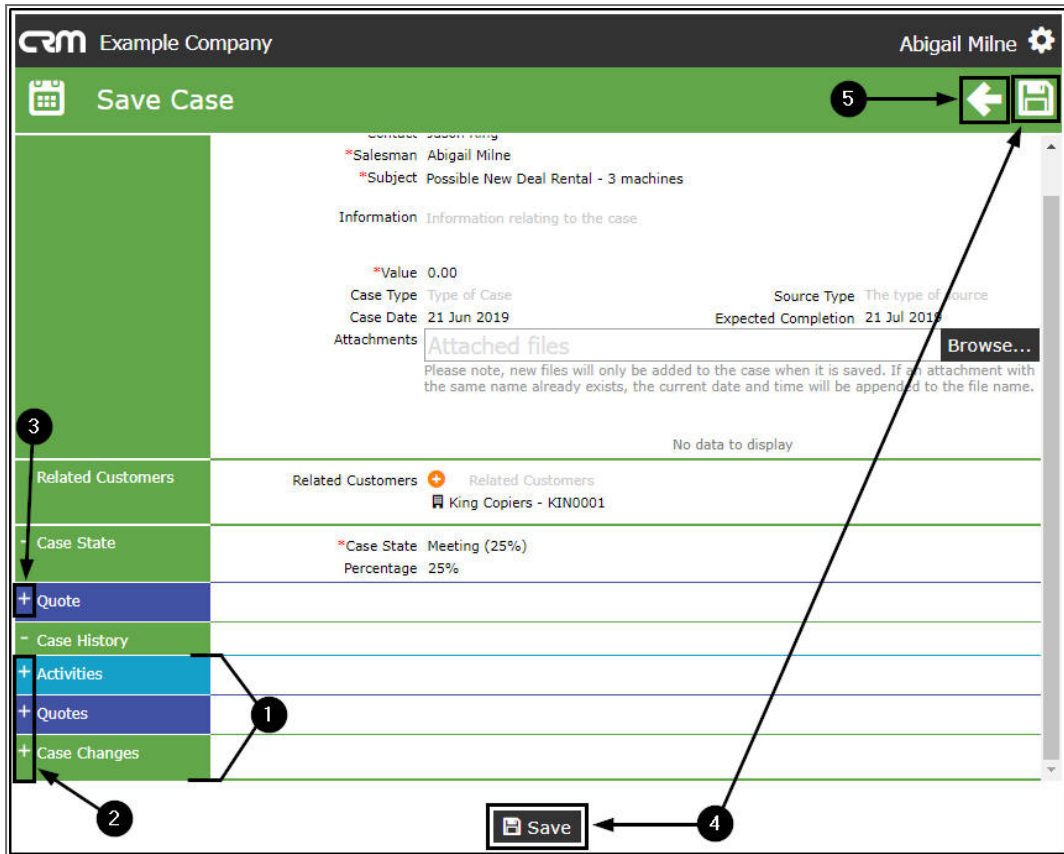
- In the Warnings page, hover over an activity, to reveal the **Action buttons**.
- Click on the **View Case Info and History** icon



1. The **Save Case** page will open.
2. The following frames will be auto-expanded:
3. **Case**
 - You will note that the **case details** are auto populated. You can edit all these details, except for the Customer, Salesman, Subject and Information fields.
4. **Related Customers**
 - You will note that the Customer Name will be auto populated, you can **add more Related Customers**, if required.
5. **Case State**
 - The Case State and Percentage will be auto populated. You can **edit the Case State**, if required (which will update the Percentage).
6. **Case History**
 - Here you can expand the **Case History** frame.

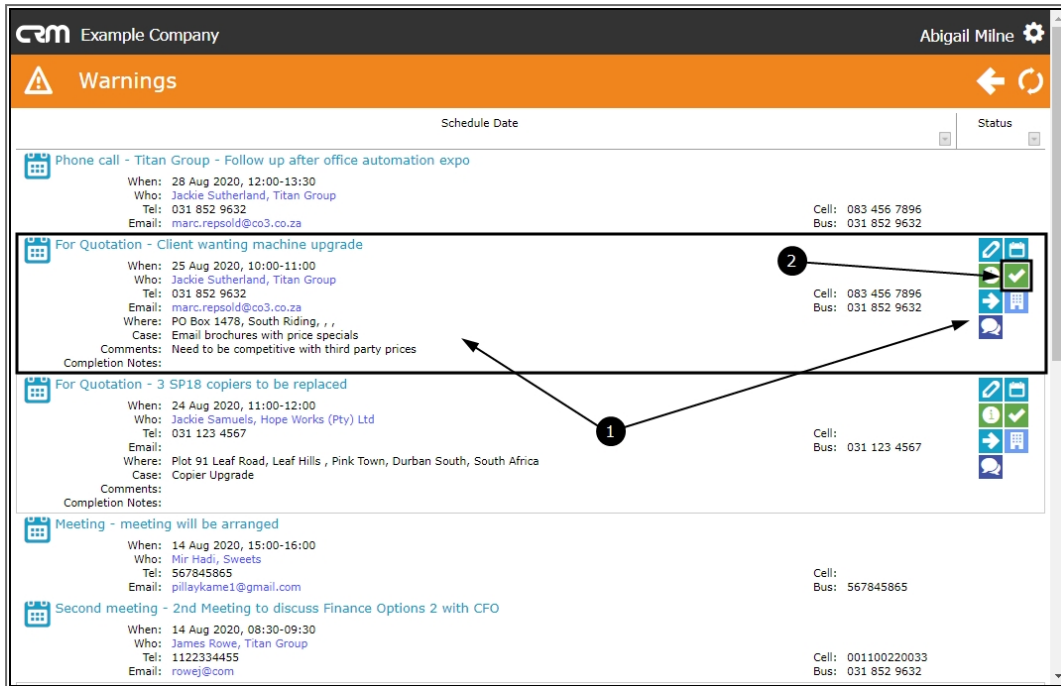


1. The 3 Case History sub-frames can now be viewed.
2. Expand these sub-sections to:
 - i. view an historical list of **Activities** and if an Activity is open it can be actioned using the **Action buttons**,
 - ii. view and edit linked **Quotes** and
 - iii. view any **Case Changes**.
3. In this page, you can create a **new Quote** linked to this Case. Refer to **Add a new Quote linked to this Case** for more information.
4. Click on **Save** to keep any changes made or
5. Click on **Back** to return to the **Warnings** listing page.

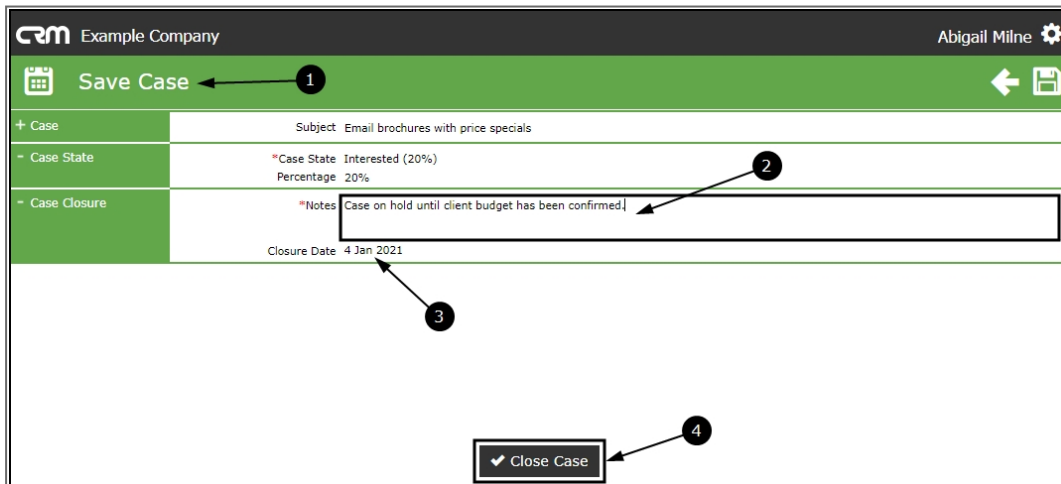


CLOSE THIS CASE

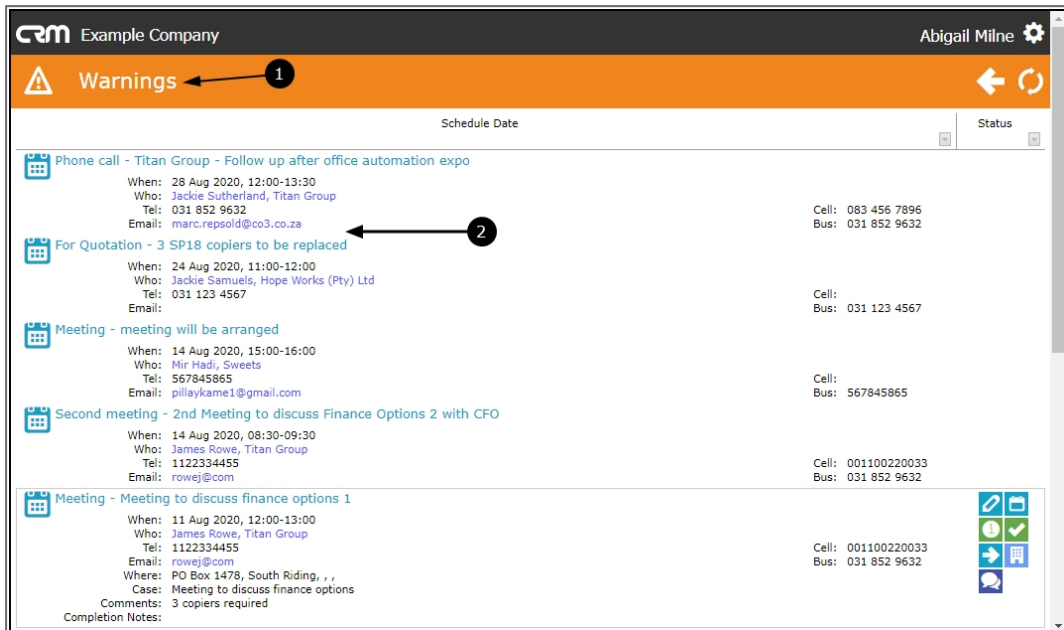
- In the Warnings page, hover over an activity, to reveal the **Action buttons**.
- Click on the **Close this Case** icon.



- The **Save Case** page will open.
- Type in the completion **Notes**. (This is mandatory.)
- The Case **Closure Date** will be auto populated.
- Click on **Close Case**.
 - **Note:** This will close the Case and any related Activities, this action cannot be undone.



1. You will return to the **Warnings** page.
2. The Warning (Case) that you selected to close, will be removed from the list.



NEXT ACTION

This option will **complete** the current activity and create a **new** activity.

- In the **Warnings** page, hover over an activity, to reveal the **Action buttons**.
- Click on the **Next Action** icon.

The screenshot shows a CRM interface for 'Example Company' with a user 'Abigail Milne'. The 'Warnings' section lists several activities:

- Phone call - Titan Group - Follow up after office automation expo** (28 Aug 2020, 12:00-13:30)
- For Quotation - 3 SP18 copiers to be replaced** (24 Aug 2020, 11:00-12:00)
- Meeting - meeting will be arranged** (14 Aug 2020, 15:00-16:00)
- Second meeting - 2nd Meeting to discuss Finance Options 2 with CFO** (14 Aug 2020, 08:30-09:30)
- Meeting - Meeting to discuss finance options 1** (11 Aug 2020, 12:00-13:00)

Callout 1 points to the 'Next Activity' icon (a blue square with a white right-pointing arrow) in the right-hand action menu of the 'Second meeting' entry. Callout 2 points to the 'Completed Activity' icon (a blue square with a white checkmark) in the same menu.

1. The **Next Activity** page will open.
2. Ensure that you update the **Completed Activity** *Notes, this is mandatory.
3. Fill in the information for the **New Activity**.

The screenshot shows a web browser window displaying a CRM interface for 'Example Company'. The user is 'Abigail Milne'. The main heading is 'Next Activity'. The form is divided into several sections:

- Case:** Subject: Meeting to discuss finance options
- Case State:** *Case State: Interested (20%), Percentage: 50%
- Completed Activity:** Summary: James Rowe - Titan Group, 2nd Meeting to discuss Finance Options 2 with CFO, 2020/08/14 8:30 AM-9:30 AM. *Notes: Completion notes about activity.
- New Activity:** *Type: Activity type, *Subject: The subject of the activity, Address: 658 Dime Road South Riding, Comments: Information relating to the activity.
- Activity Attendees:** Attendees: Abigail Milne, James Rowe. Include case contact: Include the case contact as an attendee. Send Email Invites: *note that invitations can only be sent to attendees with valid email addresses.
- Schedule:** Date: 4 Jan 2021, from 00:00 to 01:00
- Reminder:** Reminder: Email SMS 30 minutes before scheduled start

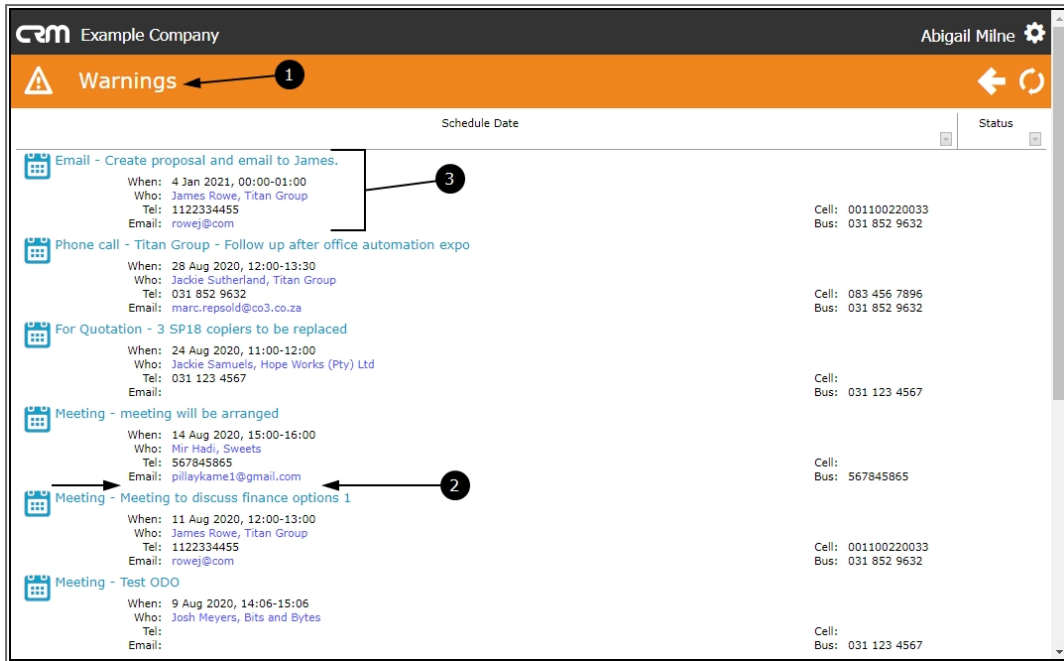
A 'Save' button is located at the bottom right of the form.

1. When you have added the **Notes** and **New Activity** information,
2. You can **Schedule** the date of the New Activity and set a **Reminder** at this point, if you wish.
 - **Note:** If you do not set the date then it will auto populate with the current date, and the time will be set to a 1 hour time slot ahead of the current time.
3. When you have entered the required information, click on **Save**.

The screenshot shows a CRM 'Next Activity' form for 'Example Company' with user 'Abigail Milne'. The form is divided into several sections:

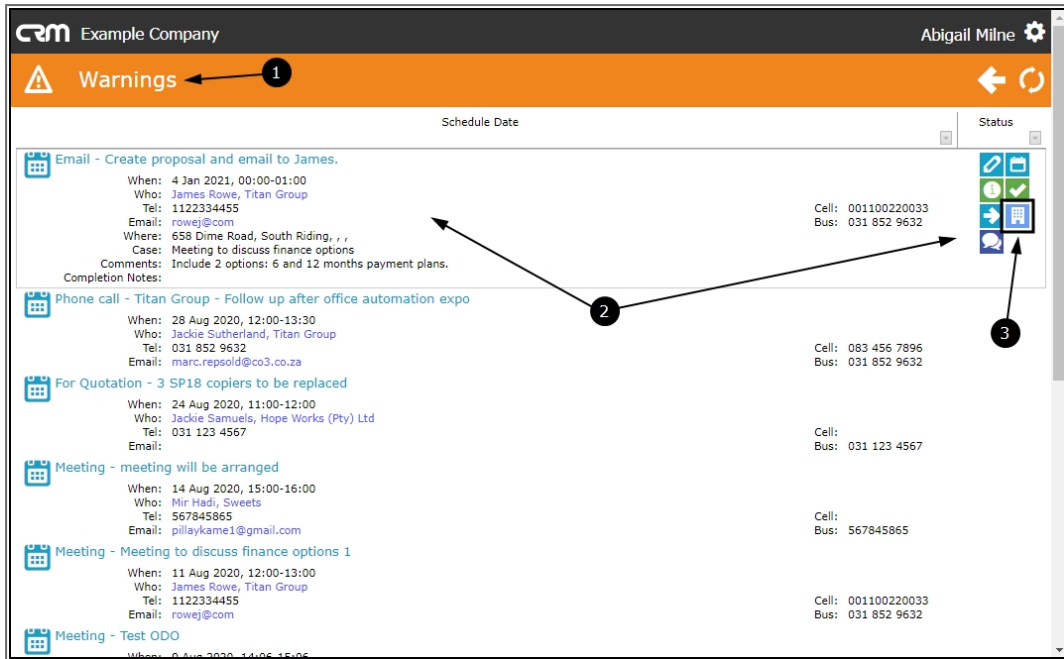
- Case:** Subject: Meeting to discuss finance options.
- Case State:** *Case State: Interested (20%), Percentage: 50%.
- Completed Activity:** Summary: James Rowe - Titan Group, 2nd Meeting to discuss Finance Options 2 with CFO, 2020/08/14 8:30 AM-9:30 AM AM. *Notes: Options discussed, proposal pending. (Annotation 1 points to this field).
- New Activity:** *Type: Email, *Subject: Create proposal and email to James. Address: 658 Dime Road South Riding. Comments: Include 2 options: 6 and 12 months payment plans. (Annotation 2 points to this section).
- Activity Attendees:** Attendees: Abigail Milne, James Rowe. Includes checkboxes for 'Include case contact' and 'Send Email Invites'. (Annotation 2 points to the 'Date' field in the Schedule section).
- Schedule:** Date: 4 Jan 2021, from 00:00 to 01:00. (Annotation 2 points to this field).
- Reminder:** Reminder Email, SMS, 30 minutes before scheduled start. (Annotation 2 points to this field).
- Save:** A 'Save' button at the bottom of the form. (Annotation 3 points to this button).

1. You will return to the **Warnings** page.
2. The originally selected Warning will be removed from the list.
3. If you did not set the date and time of the **New Activity**, it will present in the Warnings list, as in this image.
 - If you set an alternative date, ahead of the current date, it will not appear until the Activity moves into the Warning date/time parameters.



VIEW CUSTOMER

- In the **Warnings** page, hover over an activity, to reveal the **Action buttons**.
- Click on the **View Customer** icon.



1. The **Customer** page will open.
2. From here, you can access the Customer **Dashboard Tiles**,
3. the Customer **Information Tiles** and the
4. Customer **Action buttons**.
 - Use your browser's **back** button to return to the Warning List / Close the 'View Warnings' form.

The screenshot displays a CRM dashboard for 'Titan Group'. At the top, there's a navigation bar with 'Titan Group' and a search bar. Below this, the dashboard is divided into several sections:

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

Description	Target	Existing Custmrs	New Custmrs
Email	50	0	0
For Quotation	0	0	0
Gather Web Infomation	50	0	0
Meeting	15	0	0
Phone call	24	0	0
Second meeting	10	0	0
Site inspection	10	0	0
- 3 Month Performance:** A bar chart showing performance for Cases, Invoices, Orders, and Quotes. The Y-axis ranges from 0.00 to 50.00.
- 4 Month Pipeline:** A line chart showing the pipeline from Jan 2021 to Apr 2021. The Y-axis ranges from 0.00 to 0.50.
- Titan Group - TIA001:** A detailed view of a customer record, including a profile picture (placeholder with a question mark), trading name, registered name, description, VAT No (123258741369), rank, website (www.web.co.za), and phone (031 852 9632). A '75%' completion indicator is shown.
- 12 Months Sales History:** A bar chart showing sales from January 2020 to January 2021. The Y-axis ranges from 0 to 900. The legend indicates 'Contract Income' (yellow) and 'Sales Revenue' (blue).
- Navigation Grid:** A grid of icons for various functions: create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files.

Numbered callouts (1-4) highlight specific UI elements: 1 points to the Titan Group header, 2 points to the navigation grid, 3 points to a secondary navigation bar, and 4 points to a floating action menu.

NEW QUOTE

You can create a **new quote** from the **Warnings** page.

- In the **Warnings** page, hover over an activity, to reveal the **Action buttons**.
- Click on the **Quote** icon.

The screenshot shows a CRM interface titled 'Warnings' for 'Example Company'. The user 'Abigail Milne' is logged in. The interface displays a list of activities with columns for 'Schedule Date' and 'Status'. A table of activities is shown below:

Activity Title	When	Who	Tel	Email	Cell	Bus
Email - Create proposal and email to James.	4 Jan 2021, 00:00-01:00	James Rowe, Titan Group	1122334455	rowej@com	001100220033	031 852 9632
Phone call - Titan Group - Follow up after office automation expo	28 Aug 2020, 12:00-13:30	Jackie Sutherland, Titan Group	031 852 9632	marc.repsold@co3.co.za	083 456 7896	031 852 9632
For Quotation - 3 SP18 copiers to be replaced	24 Aug 2020, 11:00-12:00	Jackie Samuels, Hope Works (Pty) Ltd	031 123 4567			
Meeting - meeting will be arranged	14 Aug 2020, 15:00-16:00	Mir Hadi, Sweets	567845865	pillaykame1@gmail.com	567845865	
Meeting - Meeting to discuss finance options 1	11 Aug 2020, 12:00-13:00	James Rowe, Titan Group	1122334455	rowej@com	001100220033	031 852 9632
Meeting - Test ODO	9 Aug 2020, 14:06-15:06	Josh Meyers, Bits and Bytes			031 123 4567	
Site inspection - Test Travel Button	8 Aug 2020, 07:00-08:00	Tarryn Snow CUSTOMER CONTACT, Big Bargains	031 123 4567	kameshni.pillay@co3.co.za		
Site inspection - Install machines on all levels					031 456 7897	

Annotations in the screenshot: A circled '1' points to the 'Email' activity, and a circled '2' points to the call icon in the status column of the 'Phone call' activity.

- The **Save Quote** page will open.
- Add the quote details as required, by referring to [Add a New Quote](#).
 - **Note:** A quote will only be created if you add quote line items.

1. When you have added the required quote details,
2. click on **Save**.

 10257.03 | | 0.00 | |

</tbody>
</table>"/>

1. A **Quote saved successfully** message box will pop up.

You now have the option to:

2. **Delete**
3. **View**
4. **Save** and

5. Copy this new quote.
6. To return to the Warnings page, first select the **Back to Customer** page icon. In the opened Customer Home page, select the **Warnings** tile.

Quote saved successfully. Abigail Mthethwa

Save Quote ← [Grid Icon] [Save Icon]

Case Subject: Meeting to discuss finance options

Quote *A quote will only be created if you add quote line items.
 *Customer: Titan Group Date: 5 Jan 2021
 *Quote Contact: James Rowe *Site: Durban
 Quote Reference: QT0000320 *Print Layout: SALESQUOTE_TIT001
 Reference: Reference
 Comments: Proposal accepted in principle, email quote with 2 financial options: 6 and 12 months.

Quote Financials *Currency: South African Rand Quote Terms: Full Payment COD
 Tax Rate: 15,00000 *Commercial: Discount Commercial
 *Exchange Rate: 1.0000

Item Type	Add item	Type to find items...	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
INVN	SP2020	SP2020 Sprint Colour MF Copier	3,00	9079,41	0,00	0,00	0,00	[Copy] [Delete]	0,00	
INVN	2020-856	Drum	3,00	1177,62	0,00	0,00	0,00	[Copy] [Delete]	0,00	
			6,00	10257,03	0,00	0,00	0,00		0,00	

[Delete] [View] [Save] [Copy]

CRM.000.011