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.

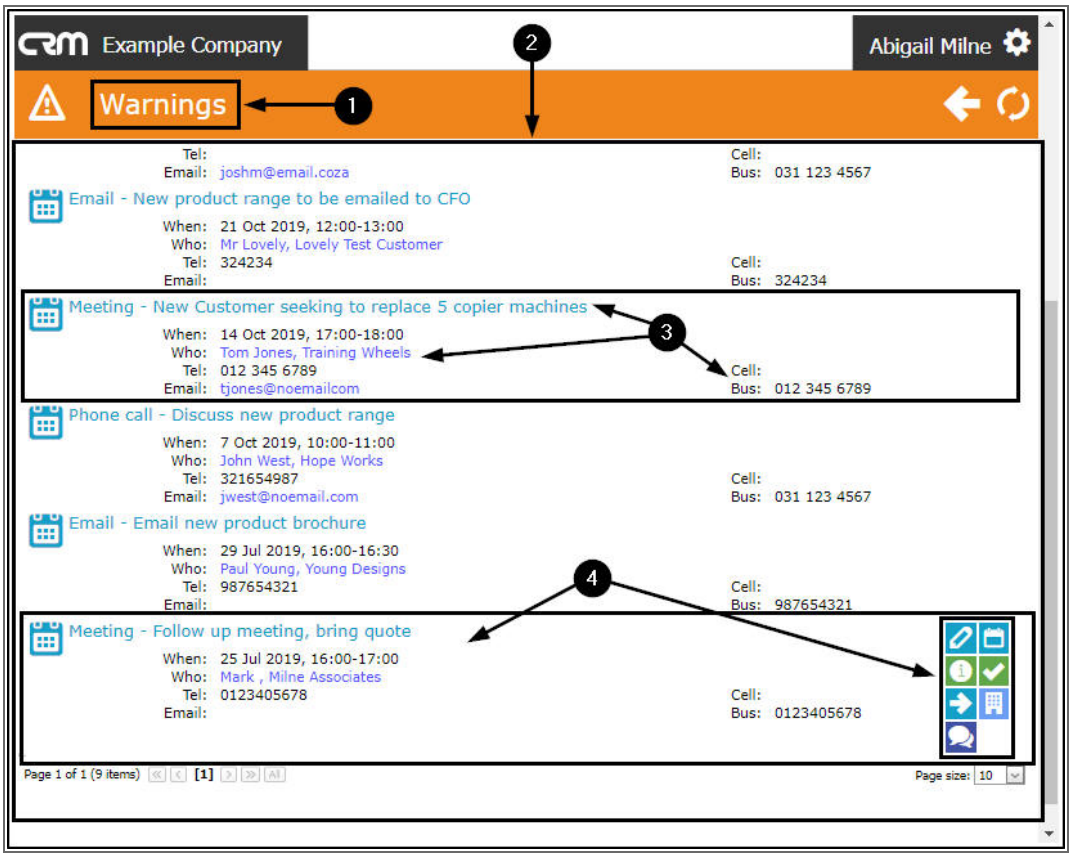
LIST OF ACTIVITIES PENDING

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:

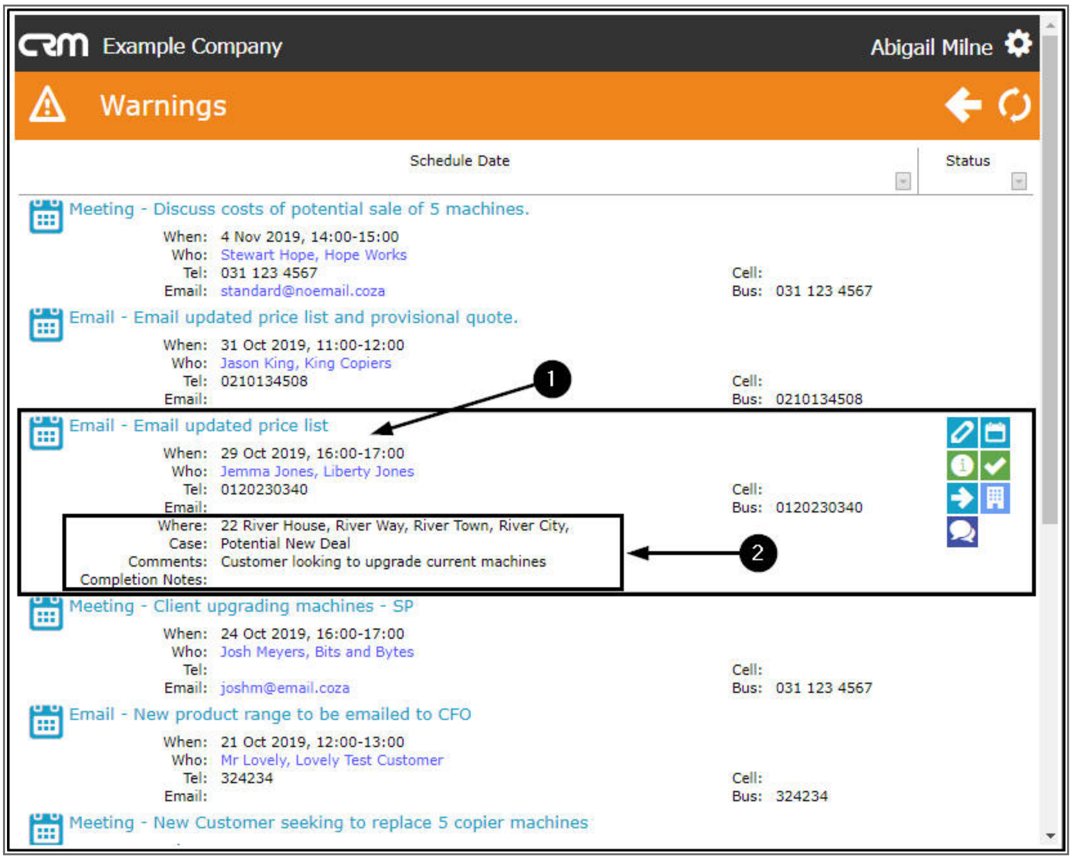
ACTIVITY ACTION BUTTONS

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.

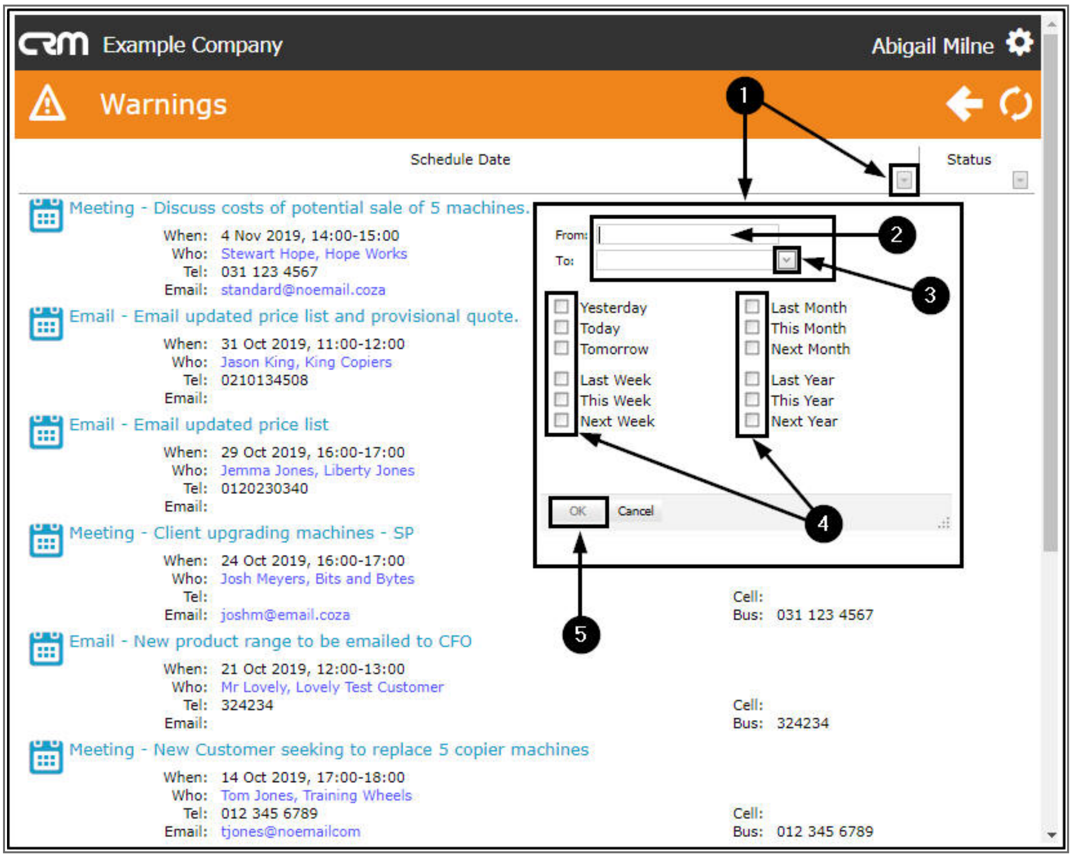
1. Click on the **drop-down arrow** in the **Schedule Date** frame to display the Select Schedule screen.

   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 <u>only</u> the warnings in the selected date parameters.

SELECT STATUS

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

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

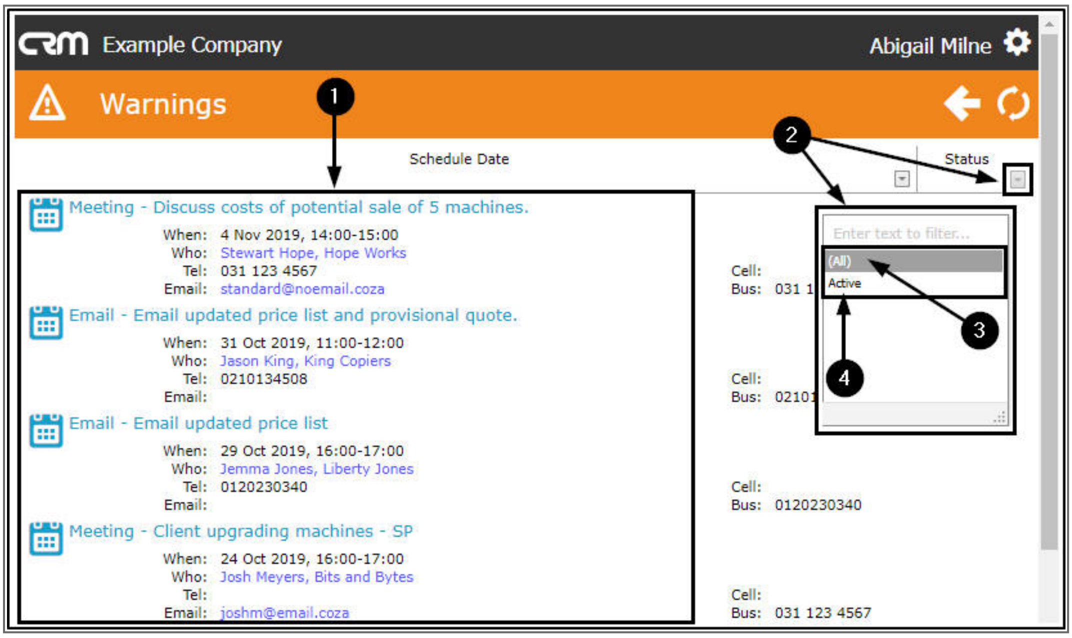
   Either

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

   Or

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

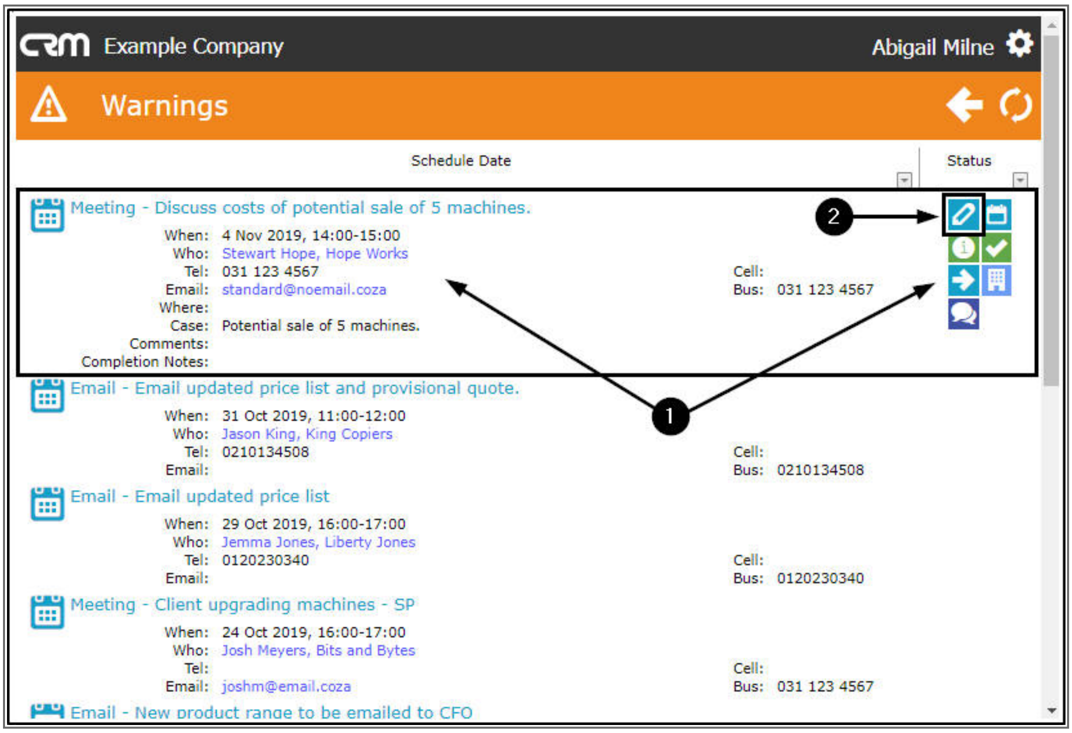
   As you click on your choice, the page will **refresh** to display the results of your selection.



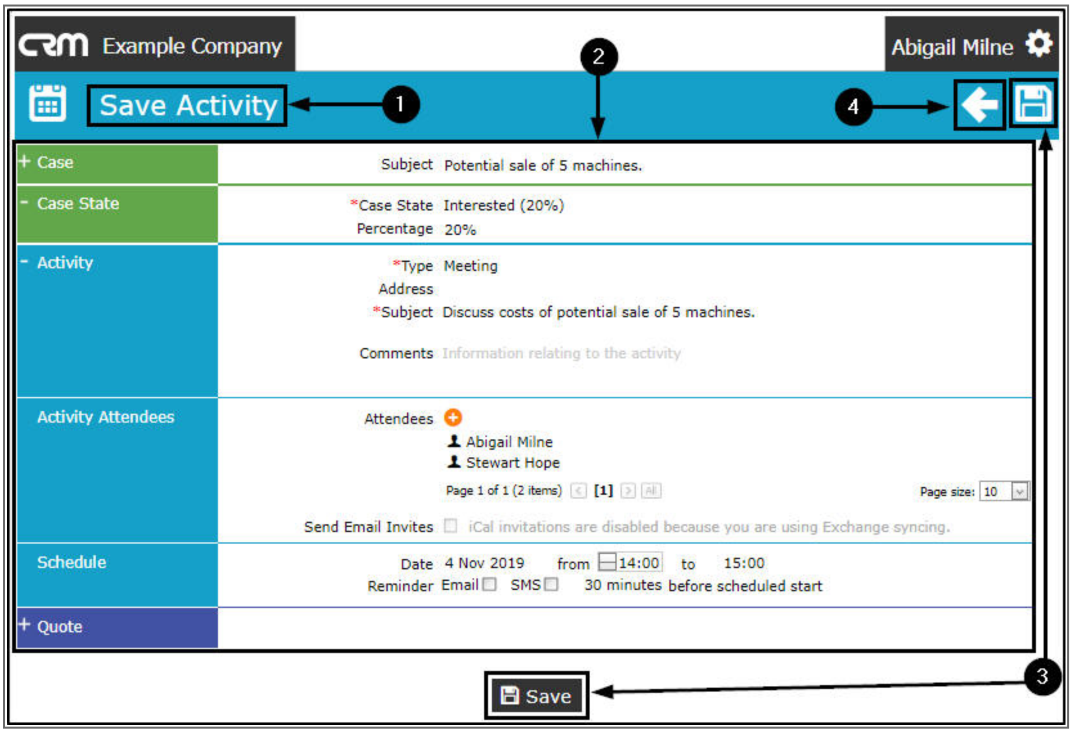
ACTIVITY ACTION BUTTONS PROCESSING

VIEW/EDIT THIS ACTIVITY

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

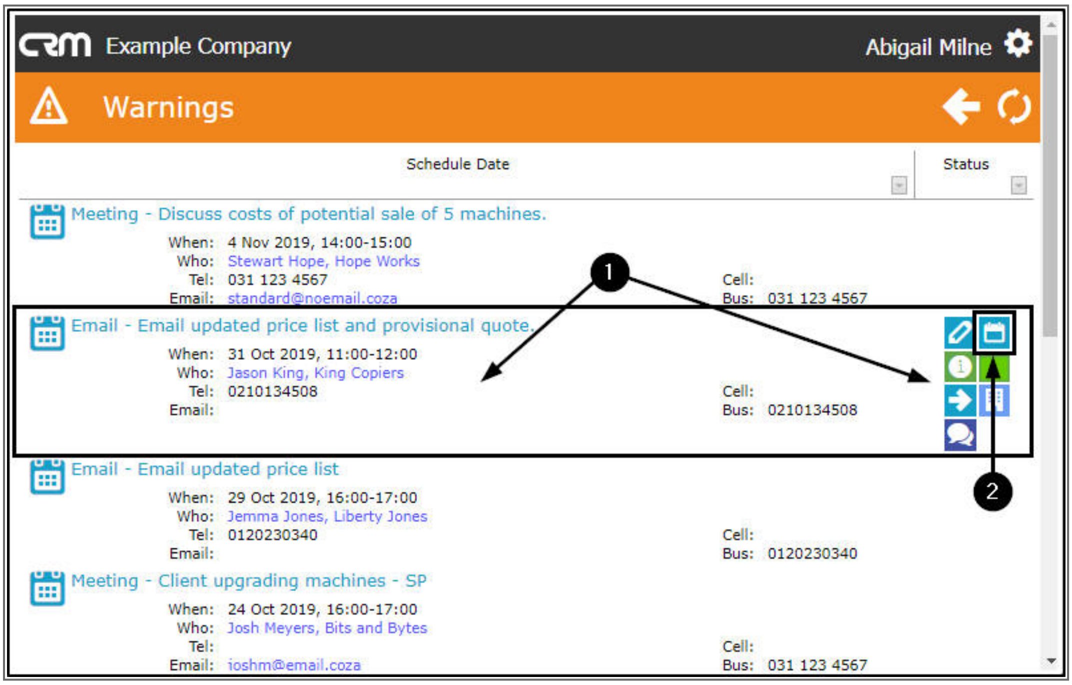


1. The **Save Activity** page will open.
2. View and/or Update the Activity details as required.
    - For more information regarding this page refer to View/Edit an Activity.
3. Click on **Save** to keep your changes,
4. or the **Back** button to return to the Warnings page.

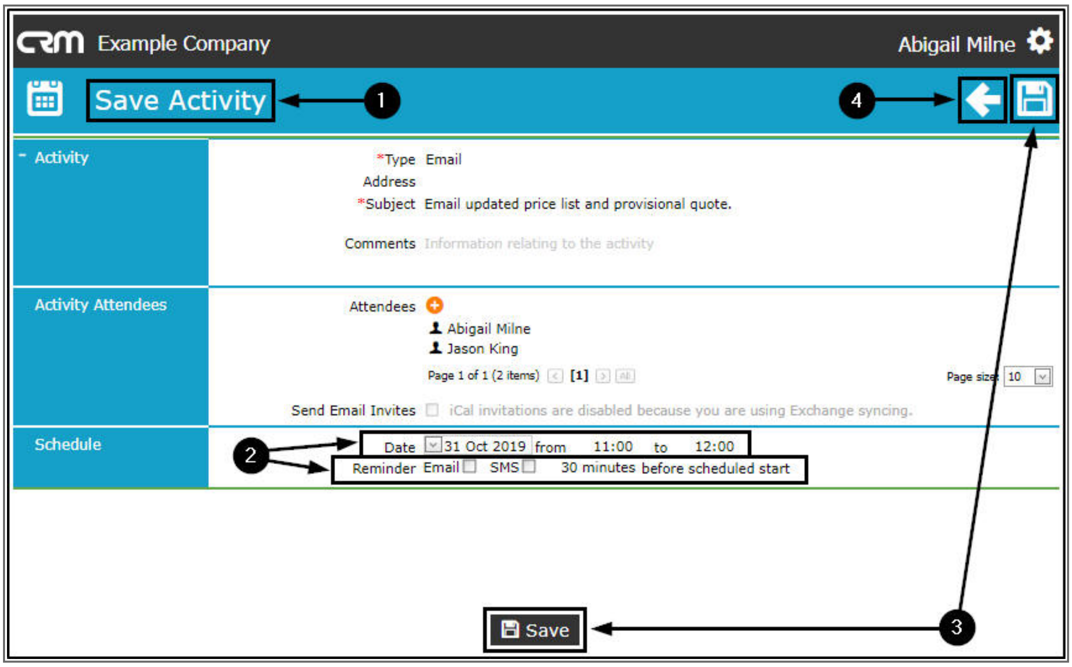


RESCHEDULE ACTIVITY

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

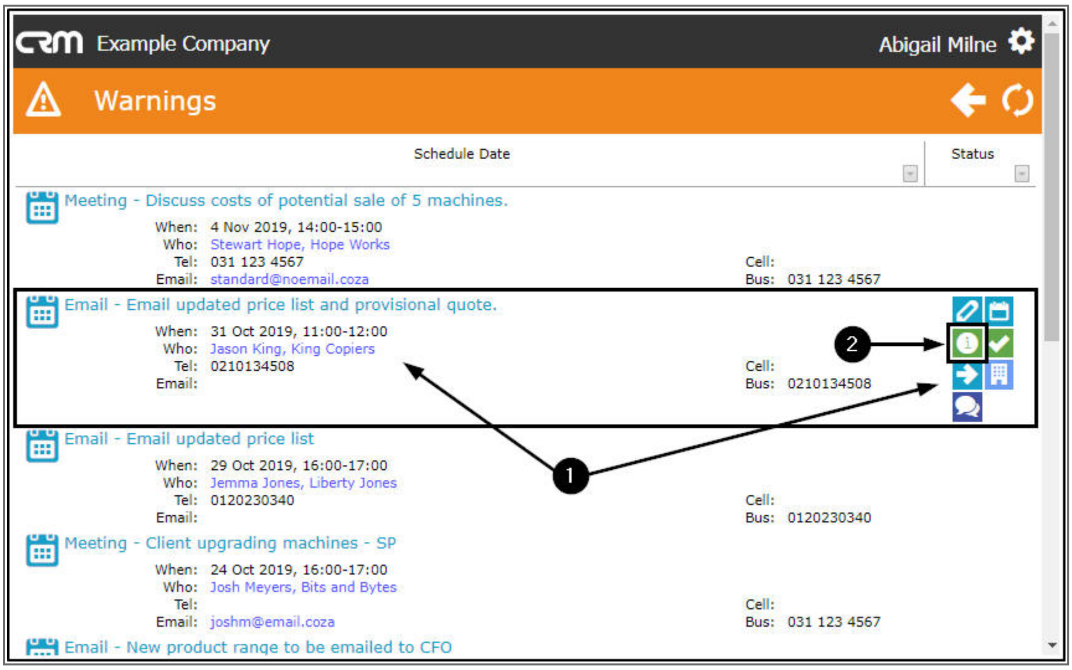


1. The **Save Activity** page will open.
2. Reset the **Activity Schedule Date** and **Reminder** details, as required.
   - For more information regarding this page refer to Scheduling.
3. Click on **Save** to keep any changes made or
4. Click on **Back** to return to the **Warnings** listing page.

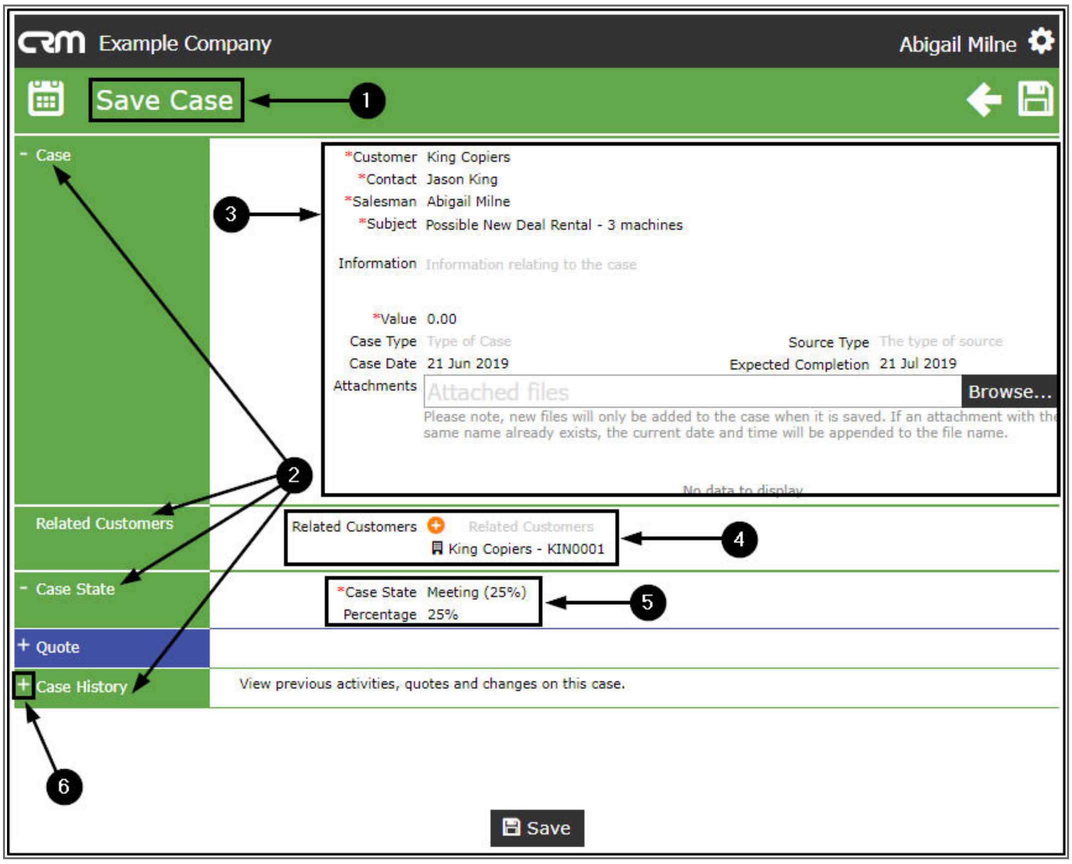


VIEW CASE INFO AND HISTORY

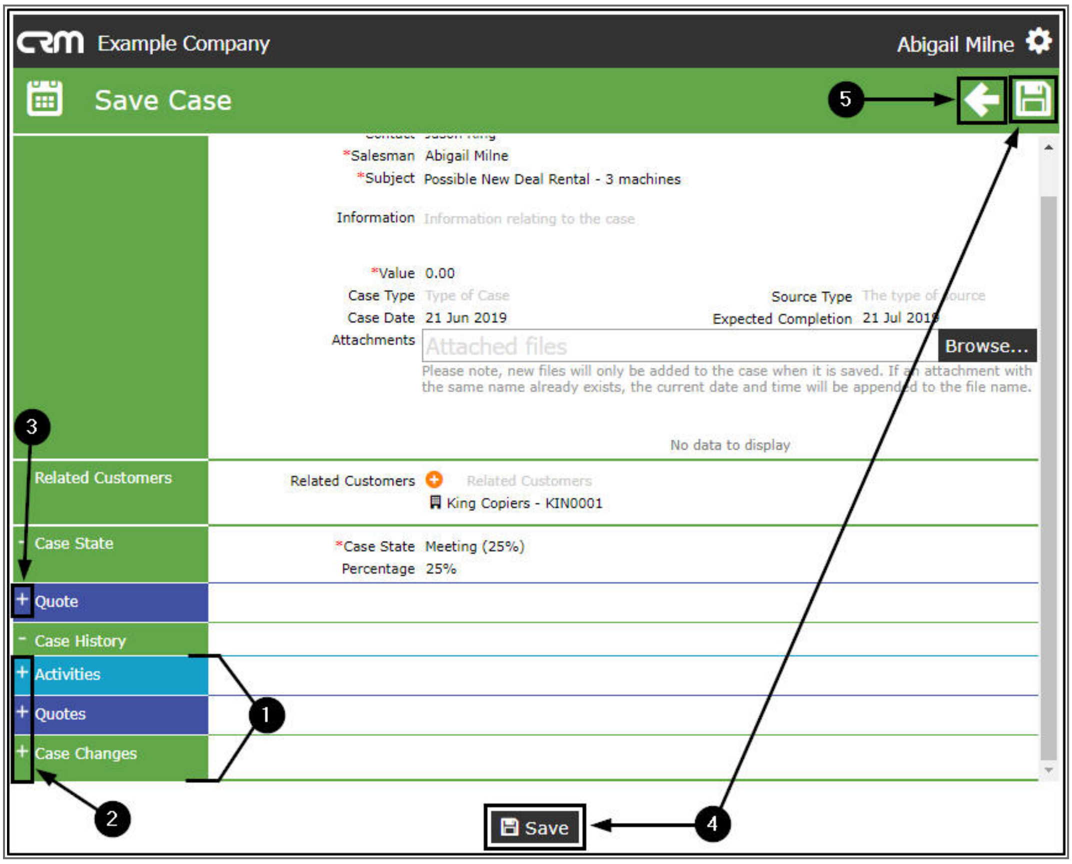
- In the Warnings page, hover over an activity, to reveal the **Action buttons**.
- Click on the **View Case Info and History** icon



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.

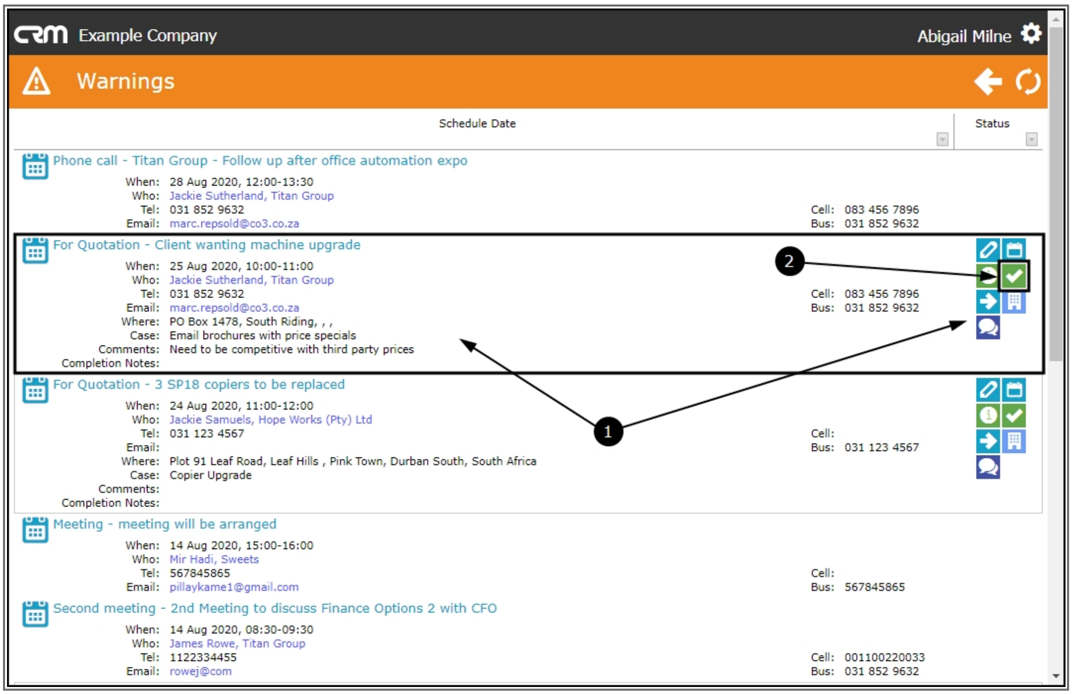


1. The 3 Case History sub-frames can now be viewed.
2. Expand these sub-sections to:
   i. view an historical list of **Activities** and if an Activity is open it can be actioned using the Action buttons,
   ii. view and edit linked **Quotes** and
   iii. view any **Case Changes**.
3. In this page, you 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.

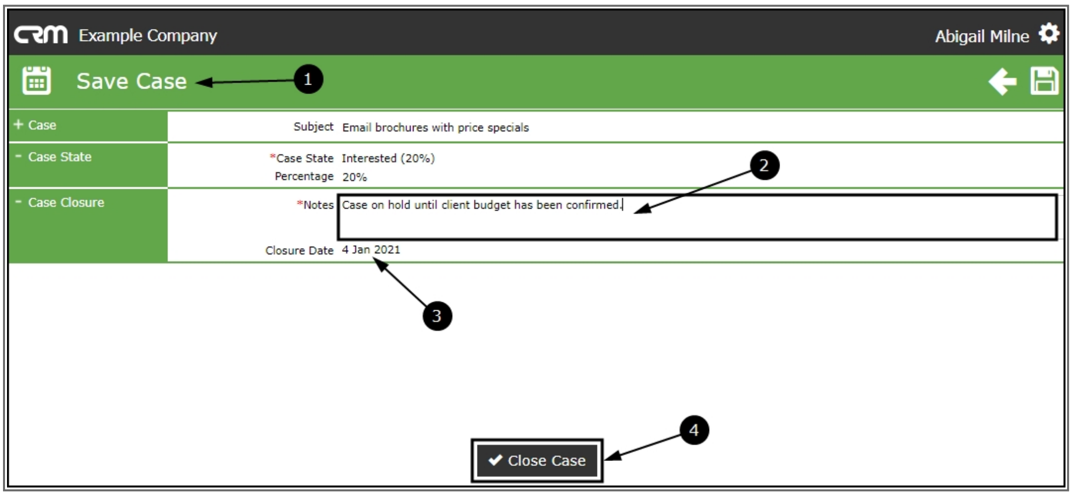


CLOSE THIS CASE

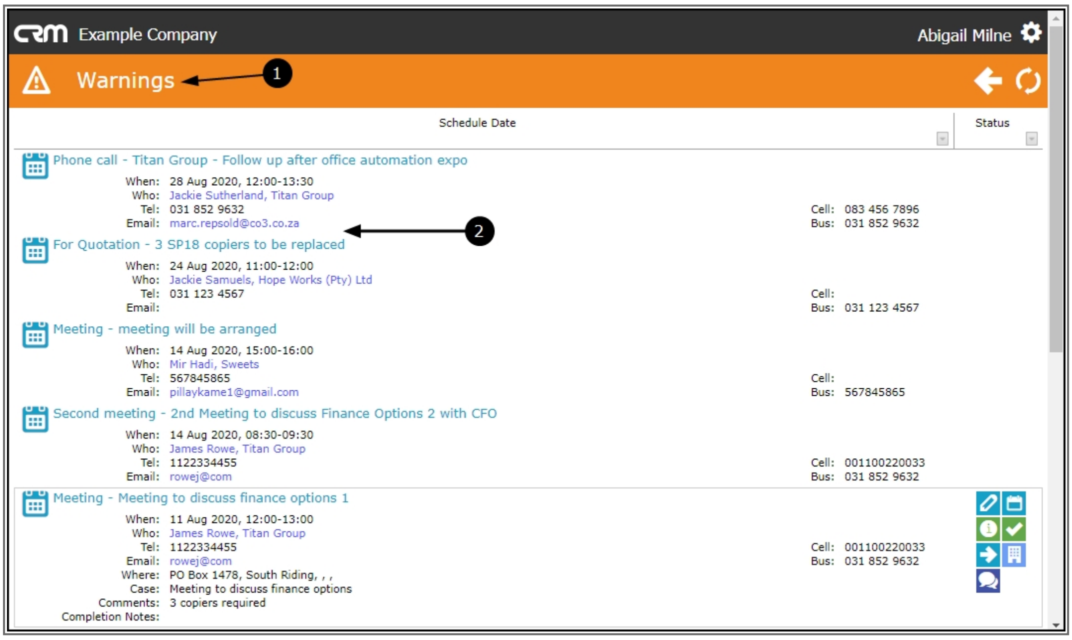
- In the Warnings page, hover over an activity, to reveal the **Action buttons**.
- Click on the **Close this Case** icon.



- 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.



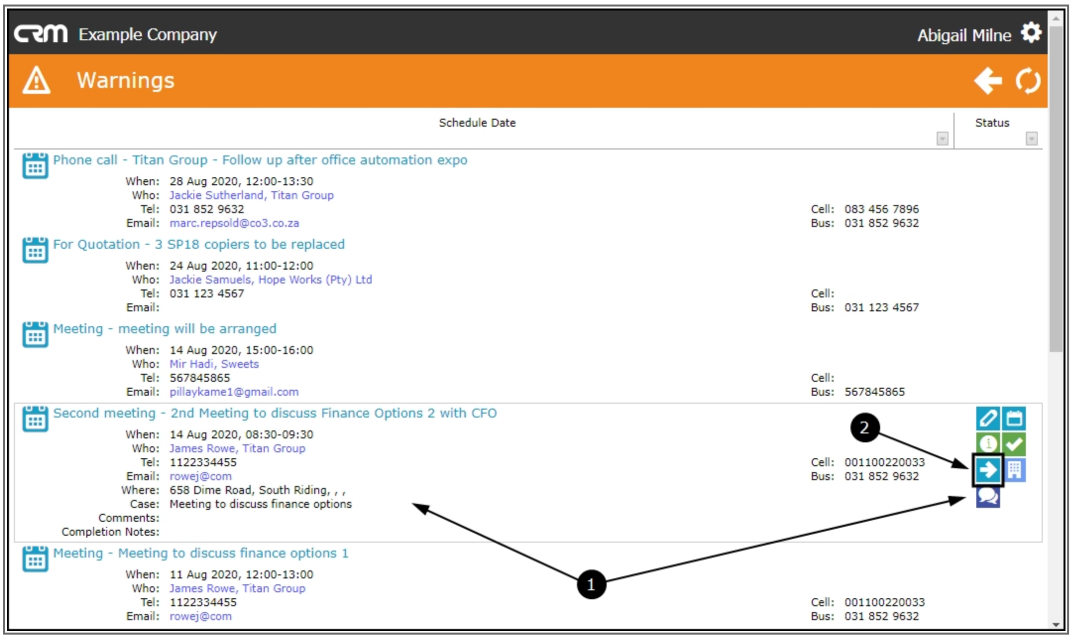
1. You will return to the **Warnings** page.
2. The Warning (Case) that you selected to close, will be removed from the list.



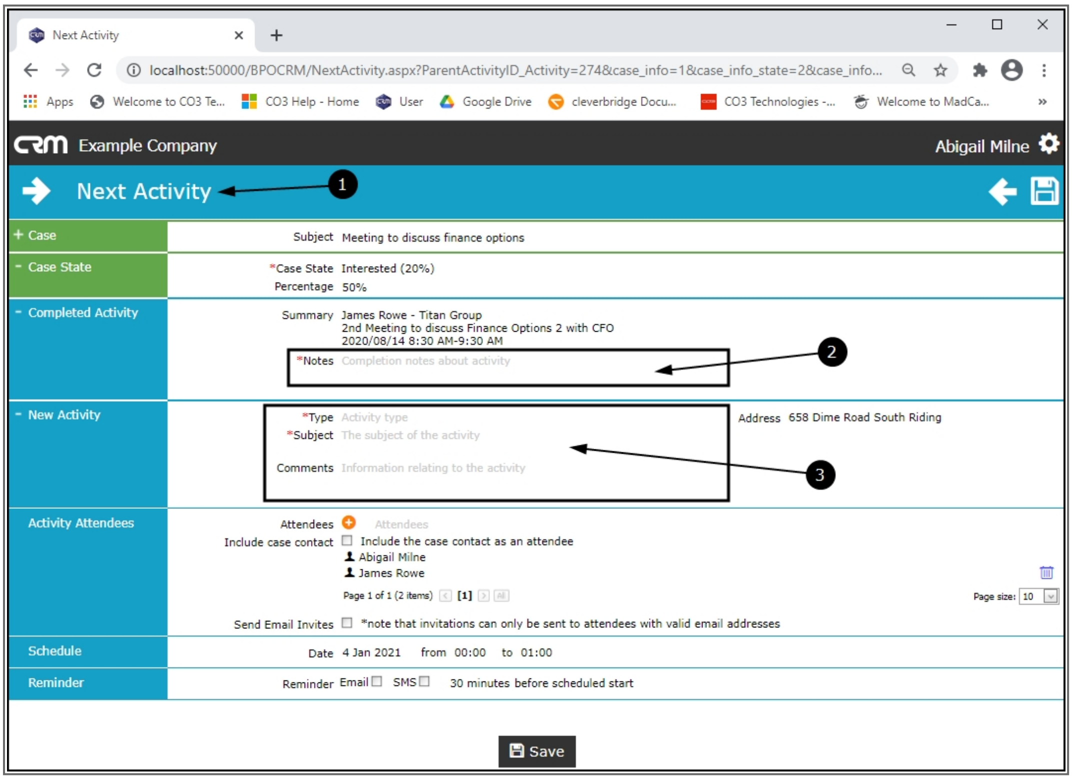
NEXT ACTION

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

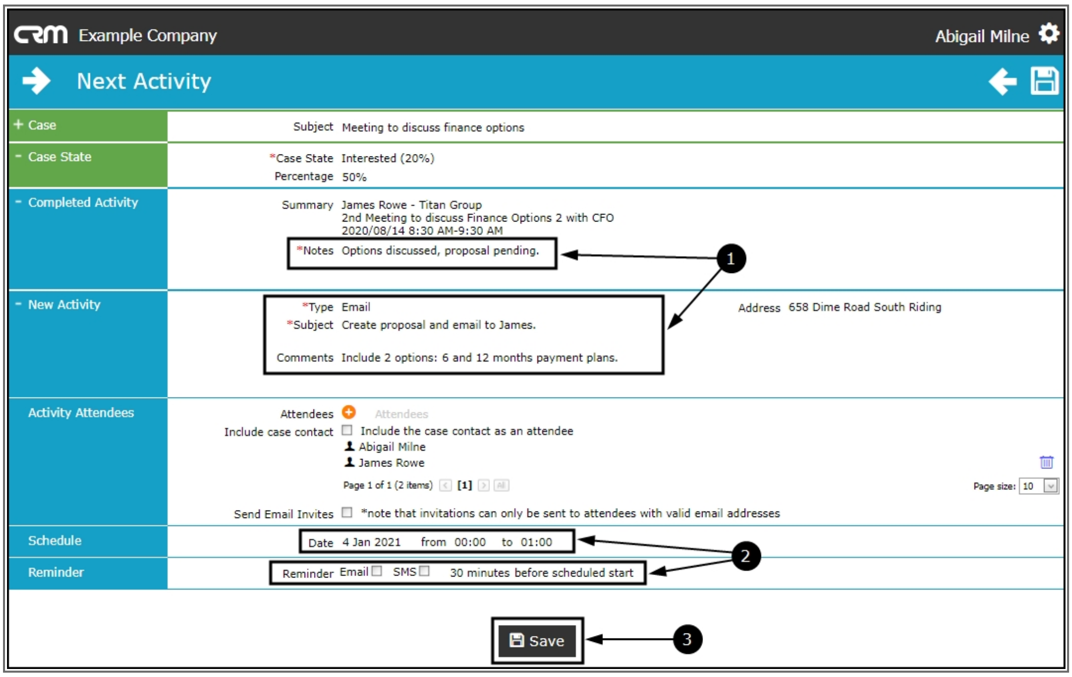
- In the **Warnings** page, hover over an activity, to reveal the **Action buttons**.
- Click on the **Next Action** icon.



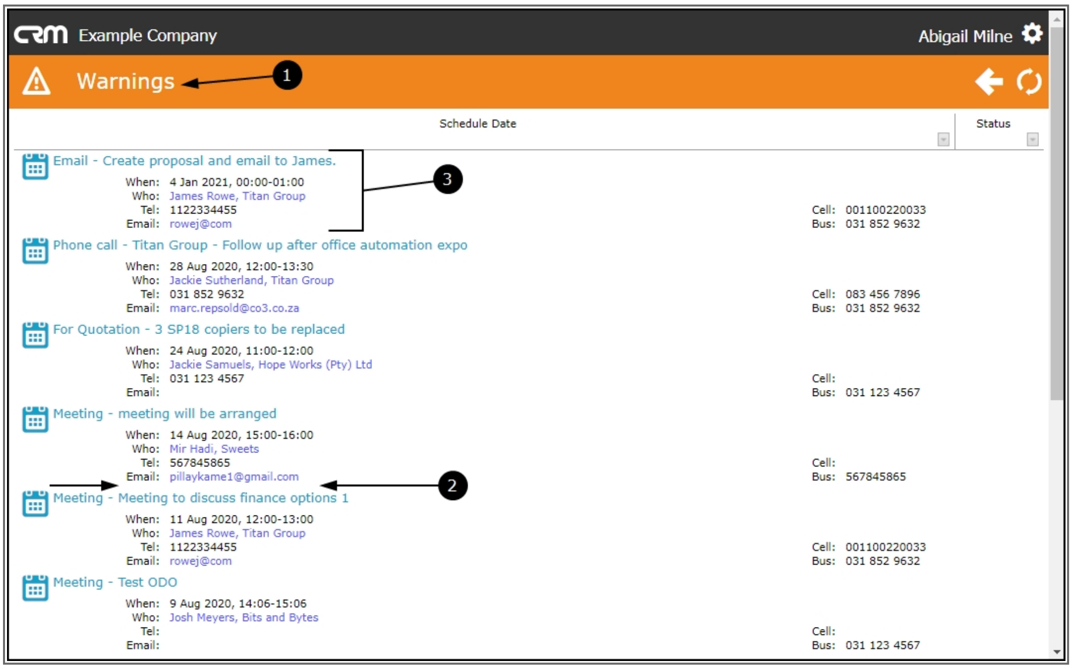
1. The **Next Activity** page will open.
2. Ensure that you update the **Completed Activity** *Notes, this is mandatory.
3. Fill in the information for the **New Activity**.



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 <u>not</u> set the date then it will auto populate with the <u>current</u> date, and the time will be set to a <u>1 hour time slot</u> ahead of the current time.
3. When you have entered the required information, click on **Save**.

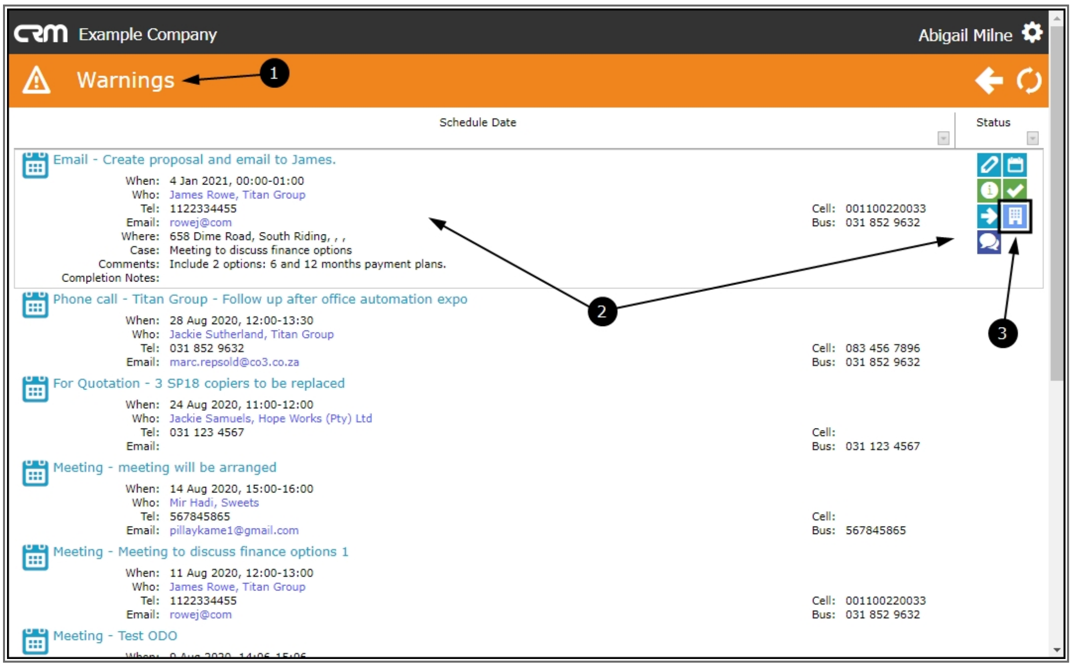


1. You will return to the **Warnings** page.
2. The originally selected Warning will be removed from the list.
3. If you did not set the date and time of the **New Activity**, it will present in the Warnings list, as in this image.
    - If you set an alternative date, ahead of the current date, it will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



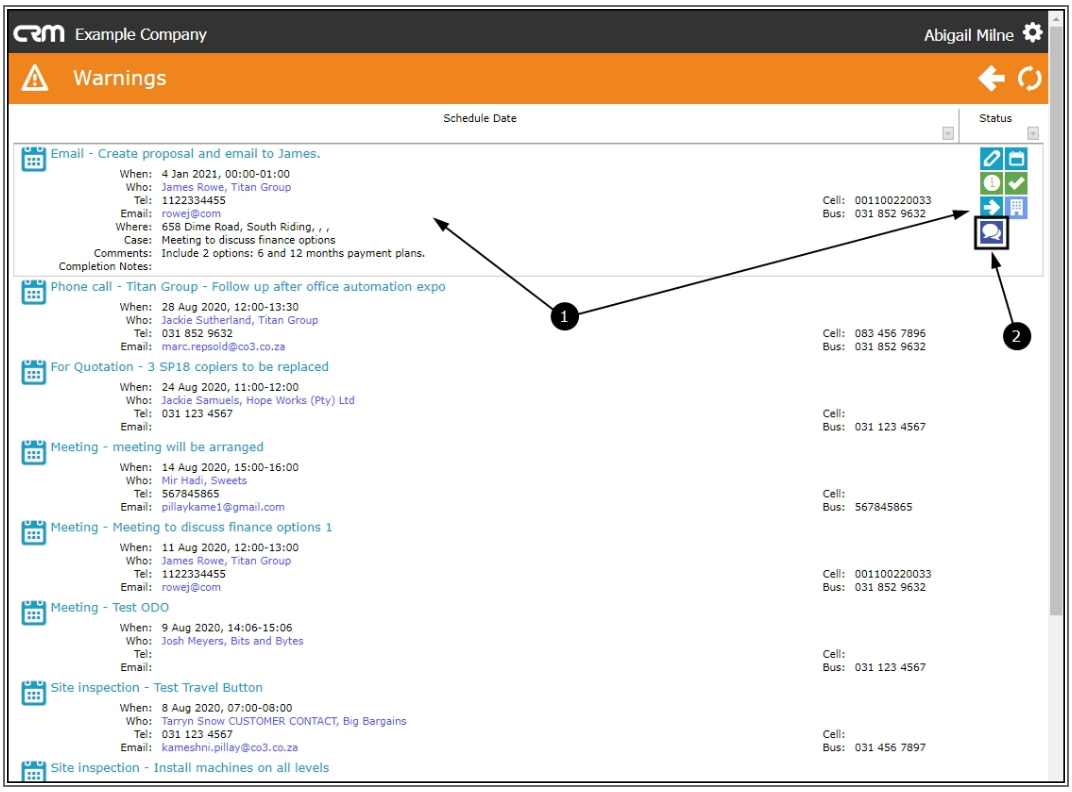
1. The **Customer** page will open.
2. From here, you can access the Customer **Dashboard Tiles**,
3. the Customer **Information Tiles** and the
4. Customer **Action buttons**.

- Use your browser's **back** button to return to the Warning List / Close the 'View Warnings' form.

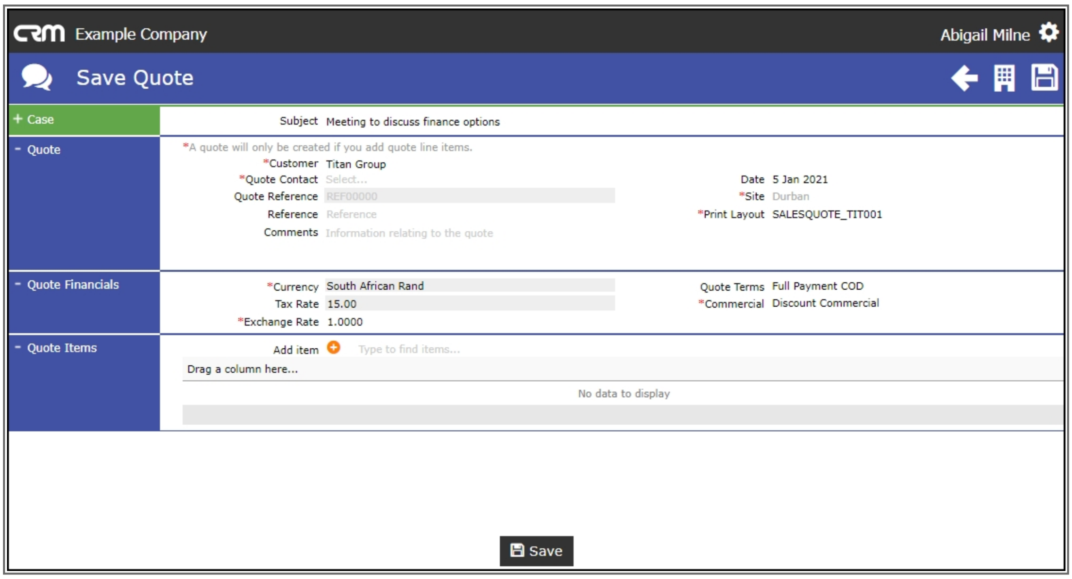
NEW QUOTE

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

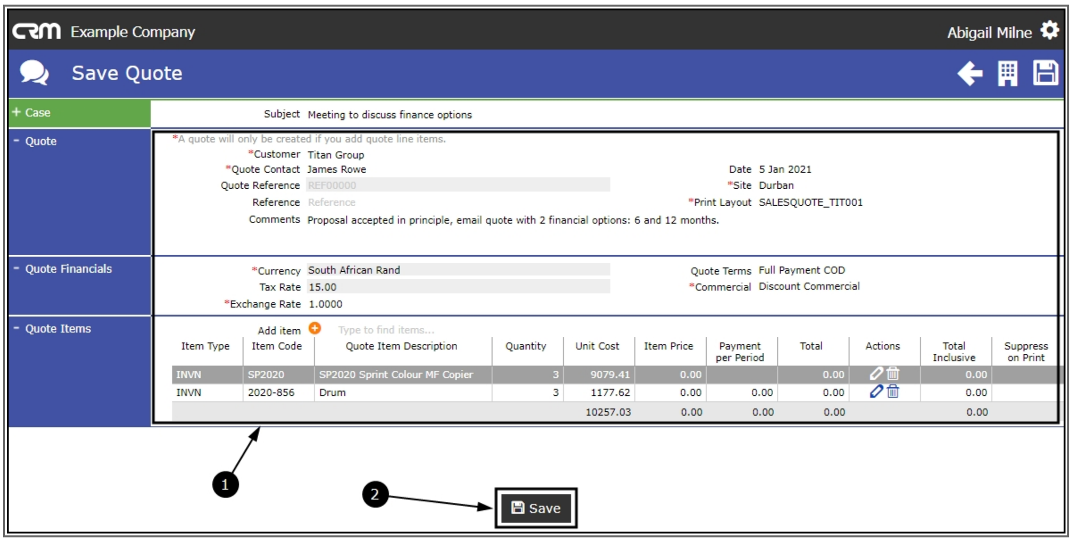
- In the **Warnings** page, hover over an activity, to reveal the **Action buttons**.
- Click on the **Quote** icon.



- The **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**.

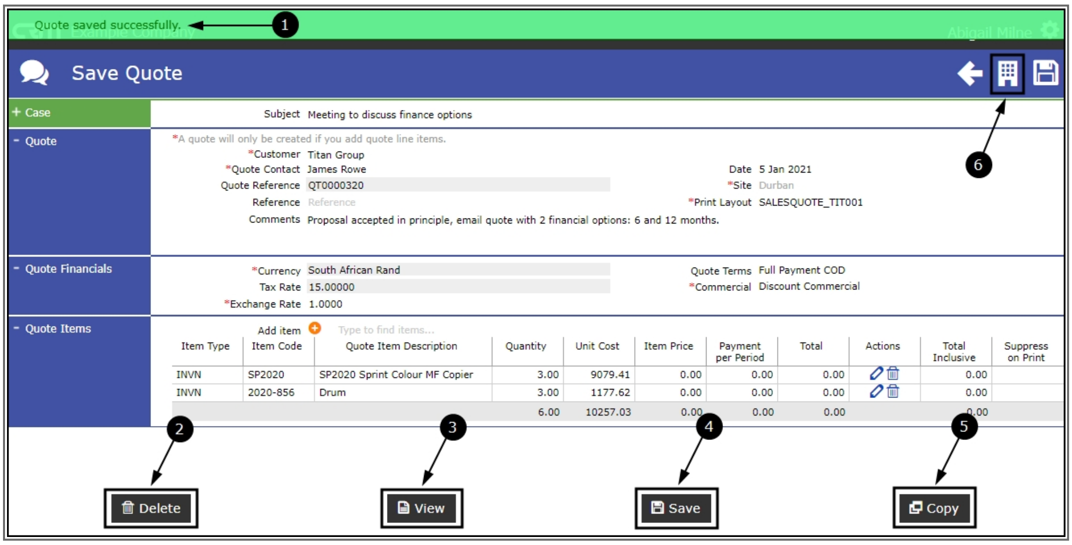


1. A **Quote saved successfully** message box will pop up.

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.



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