

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

## CRM BASICS

### ACTION BUTTONS AND INFORMATION TILES

The customers that you can view in CRM will be:

- the customers where you are the **main salesperson** or
- the customers where you are **linked** as a salesperson.

This list may include current BPO customers or **New - CRM customers**.

In the **Customers** listing page you can view and access the following customer **Actions** buttons:

- **Edit Customer**
- **Add Contact**
- **Add Third Party**
- **Add Note**
- **Maintain Customer Salesmen**
- **New Activity**
- **New Quote**
- **Release Customer** (New CRM Customers only)

In the **Customer Dashboard** (Customer Home page) you can view and access all the **Actions** buttons as listed above as well as the:

- **Create Cold Call for Customer**

You can also access the following customer **Information** tiles:

- **Sales**
- **Addresses**
- **Contacts**

- Open Activities
- Notes
- Salesmen

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

## VIEW CUSTOMER LIST

1. In the **Homepage**,
2. Click on the **Customers** tile.
3. **Note:** The number in the top left of the tile indicates how many customers that you are linked to.

The screenshot shows a CRM dashboard for 'Example Company' with the user 'Abigail Milne'. The dashboard includes a search bar, a table for 'Activities for Last 30 Days', a '1 Month Performance' bar chart, and a '4 Month Pipeline' chart. Below these are several action tiles: 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'equipment', and '3rd party'. The 'customers' tile has a blue circle with the number '2' next to it. The 'Dashboard' button at the top left has a blue circle with the number '1' next to it.

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	0
Email	30	0	0
Meeting	40	0	0
On Site inspection	50	0	0
Site inspection	2	0	0

- The **Customers** listing page will open.
  - Here you can view all the customers where you are either the **main** salesperson or **linked** as a salesperson.

## CUSTOMER ACTION BUTTONS

- Hover over** a selected customer.
  - In this example, **Hope Works** has been selected.

## ACTIVE OR RELEASED

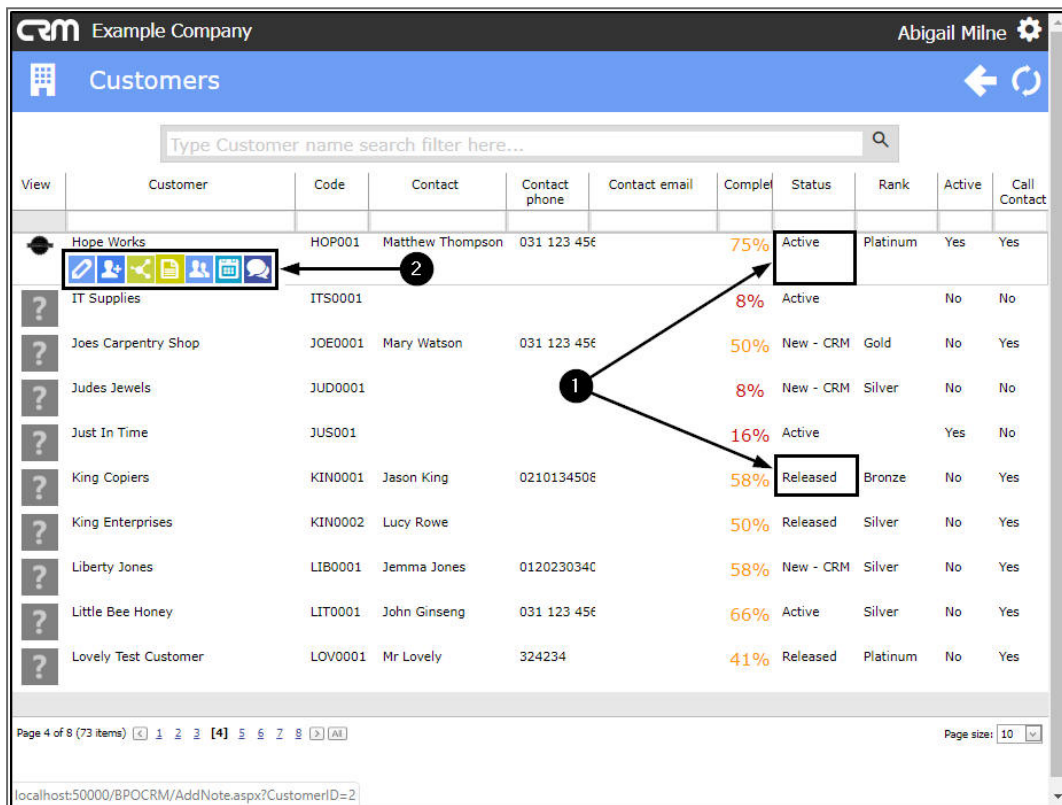
Note on Customer Status **Active** or **Released**

- You will note that the **status** of this customer is **Active**. The Actions buttons that are available (shown in the next image) will depend on the **status** of the selected customer.

View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
?	Hope Works	HOP001	Matthew Thompson	031 123 456		75%	Active	Platinum	Yes	Yes
?	IT Supplies	ITS0001				8%	Active		No	No
?	Joes Carpentry Shop	JOE0001	Mary Watson	031 123 456		50%	New - CRM	Gold	No	Yes
?	Judes Jewels	JUD0001				8%	New - CRM	Silver	No	No
?	Just In Time	JUS001				16%	Active		Yes	No
?	King Copiers	KIN0001	Jason King	0210134506		58%	Released	Bronze	No	Yes
?	King Enterprises	KIN0002	Lucy Rowe			50%	Released	Silver	No	Yes
?	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	New - CRM	Silver	No	Yes
?	Little Bee Honey	LIT0001	John Ginseng	031 123 456		66%	Active	Silver	No	Yes
?	Lovely Test Customer	LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes

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- As you hover over an **Active** or **Released** customer,
- the following **Actions buttons** will be displayed:
  - Edit Customer
  - Add Contact
  - Add Third Party
  - Add Note
  - Maintain Customer Salesmen
  - New Activity
  - New Quote



## NEW - CRM

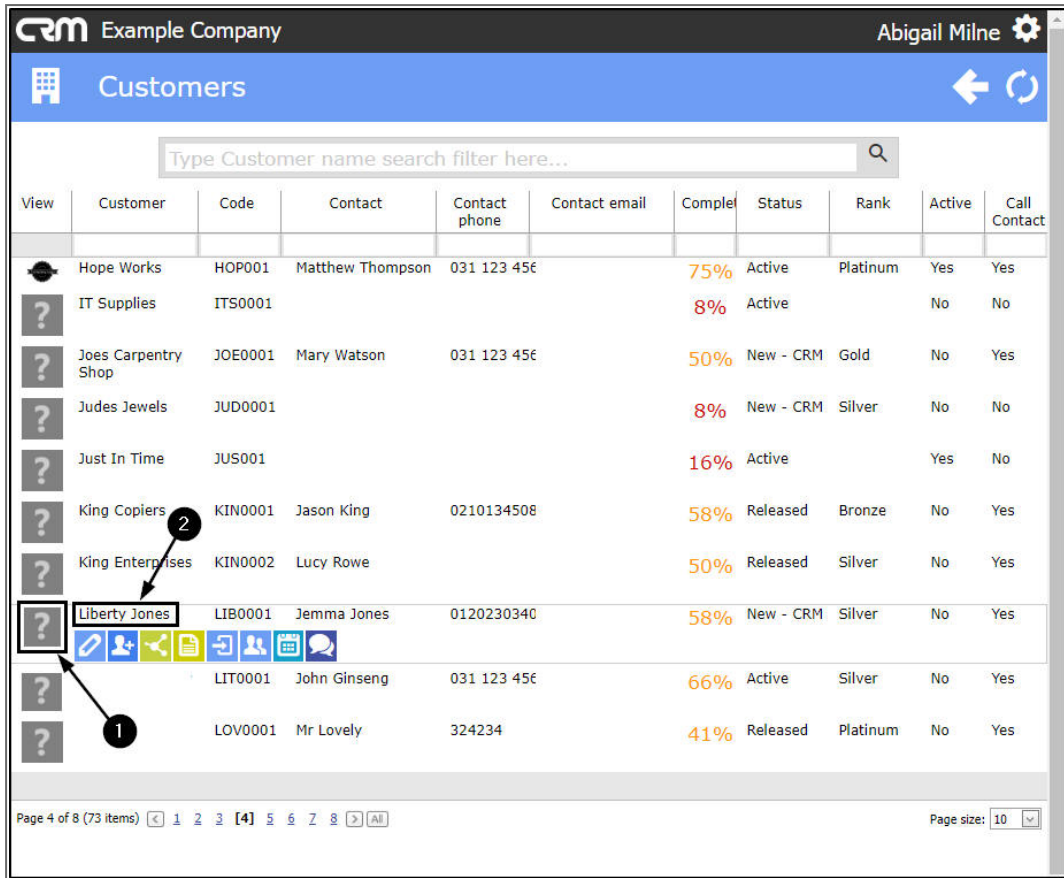
- If you selected a customer that is in status **New - CRM** then you will note an additional Action button:
- Release Customer** (for approval in BPO)

View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
	Hope Works	HOP001	Matthew Thompson	031 123 456		75%	Active	Platinum	Yes	Yes
	IT Supplies	ITS0001				8%	Active		No	No
	Joes Carpentry Shop	JOE0001	Mary Watson	031 123 456		50%	New - CRM	Gold	No	Yes
	Judes Jewels	JUD0001				8%	New - CRM	Silver	No	No
	Just In Time	JUS001				16%	Active		Yes	No
	King Copiers	KIN0001	Jason King	0210134506		58%	Released	Bronze	No	Yes
	King Enterprises	KIN0002	Lucy Rowe			50%	Released	Silver	No	Yes
	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	New - CRM	Silver	No	Yes
	Little Bee Honey	LIT0001	John Ginseng	031 123 456		66%	Active	Silver	No	Yes
	Lovely Test Customer	LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes

## CUSTOMER HOME PAGE

To view both the customer **Actions buttons** and the customer **Information tiles** in the same screen - you will need to navigate to the **Customer Dashboard**.

1. In the **Customers** listing page, click on the selected customer icon in the **View** column.
2. In this example, **Liberty Jones** has been selected.



1. The selected **Customer Dashboard** will open.

## CUSTOMER INFORMATION TILES

2. The customer **Information tiles** are displayed directly on this page:

- Sales
- Addresses
- Contacts
- Open Activities
- Notes
- Salesmen

## CUSTOMER ACTION BUTTONS

3. To view the customer **Action** buttons hover anywhere in the customer information frame.

**CRM Example Company** Abigail Milne

**Customer Dashboard** Search

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	0
Email	30	0	0
Meeting	40	0	0
On Site inspection	50	0	0
Site inspection	2	0	0

**Liberty Jones - LIB0001**

Trading Name: Liberty Jones (58%)  
Registered Name: Liberty Jones  
Description: Household and Clothing Stores Head Office  
VAT No:  
Rank: Silver  
Website: http://  
Phone: 0120230340

**12 Months Sales History**

Contract Income Sales Revenue

1. The customer **Actions Buttons** will then be displayed:

- Edit Customer
- Add Contact
- Add Third Party
- Add Note

- **Maintain Customer Salesmen**
- **Create Cold Call for Customer** (this button is only available from the Customer Home page)
- **New Activity**
- **New Quote**
- **Release Customer** (this button is only available for **New - CRM customers**)

2. Click on any of these buttons to direct you to the relevant **Action page**.

**CRM Example Company** | Abigail Milne

**Customer Dashboard** | Search

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	0
Email	30	0	0
Meeting	40	0	0
On Site inspection	50	0	0
Site inspection	2	0	0

**1 Month Performance**

**4 Month Pipeline**

**Liberty Jones - LIB0001**

Trading Name: Liberty Jones  
Registered Name: Liberty Jones  
Description: Household and Clothing Stores Head Office  
VAT No:  
Rank: Silver  
Website: http://  
Phone: 0120230340

58%

**12 Months Sales History**

Contract Income | Sales Revenue

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