

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

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- Open Activities
- Notes
- Salesmen

Access: Webpage - 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.





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

## **CUSTOMER ACTION BUTTONS**

- 2. 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.

C	Example Company							Abi	gail Mil	ne 🍄
	Customers	-0							¢	- O
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View	Customer	2 Code	Contact	Contact phone	Contact email	Complet	Status	Rank	Active	Call Contact
٠	Hope Works	HOP001	Matthew Thompson	031 123 456		75%	Active	Plathoum	Yes	Yes
?	IT Supplies	ITS0001				8%	Active	3	No	No
?	Joes Carpentry Shop	JOE0001	Mary Watson	031 123 456	E	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	0210134508		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	Ę	66%	Active	Silver	No	Yes
?	Lovely Test Customer	LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes
Page 4 of	8 (73 items) <u>(1 2 3</u> [4] <u>5 6</u>	Z <u>8</u> > Al							Page size	e: 10 🗸
2										



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

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H	Customers								÷	· O
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٠	Hope Works	HOP001	Matthew Thompson	031 123 456		75%	Active	Platinum	Yes	Yes
?	IT Supplies	ITS0001	y		/	8%	Active	6	No	No
?	Joes Carpentry Shop	JOE0001	Mary Watson	031 123 456		50%	New - CRM	Gold	No	Yes
?	Judes Jewels	JUD0001		0		8%	New - CRM	Silver	No	No
?	Just In Time	JUS001				16%	Active	-1	Yes	No
?	King Copiers	KIN0001	Jason King	0210134508		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
Page 4 of	8 (73 items) <u>(123</u> [4] <u>567</u>	8 (> (AL)							Page size	: 10 🖂
localhos	t:50000/BPOCRM/AddNote.aspx?Cust	omerID=2								

#### **NEW - CRM**

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



omer Code HOP001 ITS0001 DP JOE0001	Contact Matthew Thompson	Contact phone	Contact email	Complet	<u>Status</u>	Q, Rank	Active	Call Contac
omer Code HOP001 ITS0001	Contact	Contact phone			<u>Status</u>		Active	
HOP001 ITS0001		phone			<u>Status</u>	Rank	Active	
ITS0001	Matthew Thompson	031 123 456						-
				75%	Active	Platinum	Yes	Yes
JOE0001				8%	Active		No	No
	Mary Watson	031 123 456		50%	New - CRM	Gold	No	Yes
JUD0001				8%	New - CRM	Silver	No	No
JUS001				16%	Active		Yes	No
KIN0001	Jason King	0210134508		58%	Released	Bronze	No	Yes
KIN0002	Lucy Rowe			50%	Released	Silver	No	Yes
LIB0001	Jemma Jones	0120230340	0	58%	New - CRM	Silver	No	Yes
Release Customer	John Ginseng	031 123 456	U	66%	Active	Silver	No	Yes
LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes
3 [4] 5 6 Z 8 > AI							Page size	. 10 5
	KIN0001 KIN0002 LIB0001 Release Customer LUT0001	KIN0001 Jason King KIN0002 Lucy Rowe LIB0001 Jemma Jones Release Customer LOV0001 Mr Lovely	KIN0001   Jason King   0210134508     KIN0002   Lucy Rowe     LIB0001   Jemma Jones   0120230340     Release Customer   LIT0001   John Ginseng   031 123 456     LOV0001   Mr Lovely   324234	KIN0001 Jason King 0210134508   KIN0002 Lucy Rowe   LIB0001 Jemma Jones 0120230340   Image: Customer LIT0001 John Ginseng 031 123 456   LOV0001 Mr Lovely 324234	KIN0001 Jason King 0210134508 58%   KIN0002 Lucy Rowe 50%   LIB0001 Jemma Jones 012023034C 58%   Release Customer LIT0001 John Ginseng 031 123 45€ 66%   ner L0V0001 Mr Lovely 324234 41%	KIN0001 Jason King 0210134506 58% Released   KIN0002 Lucy Rowe 50% Released   LIB0001 Jemma Jones 012023034C 58% New - CRM   Image: Release Customer LIT0001 John Ginseng 031 123 456 66% Active   Image: Release Customer LOV0001 Mr Lovely 324234 41% Released	KIN0001 Jason King 0210134506 58% Released Bronze   KIN0002 Lucy Rowe 50% Released Silver   LIB0001 Jemma Jones 0120230340 58% New - CRM Silver   Release Customer LIT0001 John Ginseng 031 123 456 66% Active Silver   New L0V0001 Mr Lovely 324234 41% Released Platinum	KIN0001 Jason King 021013450E 58% Released Bronze No   KIN0002 Lucy Rowe 50% Released Silver No   LIB0001 Jemma Jones 0120230340 58% New - CRM Silver No   Release Customer LIT0001 John Ginseng 031 123 45€ 66% Active Silver No   ner LOV0001 Mr Lovely 324234 41% Released Platinum No

# **CUSTOMER HOME PAGE**

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

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



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'iew	Customer	Code	Contact	Contact phone	Contact email	Complet	Status	Rank	Active	Call Conta
•	Hope Works	HOP001	Matthew Thompson	031 123 45 <del>6</del>		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	0210134508		58%	Released	Bronze	No	Yes
?	King Enterprises	KIN0002	Lucy Rowe			50%	Released	Silver	No	Yes
2	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	New - CRM	Silver	No	Yes
-	0 🕹 ≺ 🕒		<b>ii</b> 🔍							
?	$\langle \rangle$	LIT0001	John Ginseng	031 123 456		66%	Active	Silver	No	Yes
?	Ò	LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes

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 Exan	mple Company	/	Abigail N	4ilne 🍄 🔒
Cust	tomer Dasł	nboard 🔫		Q
Activitie	es for Last 3	0 Days	1 Month Performance 4 Month Pipeline	
Description	Target Existi Custr		15 000.00 0.40	
Phone call	400 0		12 000.00	
Email	30 0		9 000.00 0.20	
Meeting On Site	40 0 50 0		6 000.00	
inspection	50 0	) 0	3 000.00	
Site inspection	2 0	0 (	0.00 0.00 Cases Invoices Orders Quotes Sep 2019 Oct 2019 Nov 2019	Dec 2019
			Liberty Jones - LIB0001	
create cold call	recommendations	A warnings	Trading Name Liberty Jones 58% Registered Name Liberty Jones Description Household and Clothing Stores Head Office VAT No	
		odano de la	Rank Silver	
<b>.</b>	-	Ē	Created 2010/01/21 2.27-01/99 WebSite http:// Phone 0120230340	
customers	cases	activities		
2		•	12 Months Sales History	3
quotes	orders	invoices	0.4	-
			0.35	
5	Q.	<b>9</b>	0.3	
			0.2	
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S.	$\prec$		0.05 0 compared to the poly of	
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			Contract Income Sales Revenue	
			©2019 C03 Technologies (Pty) Ltd ( 3.5.6.0 / 3.5.6.0)	E.

- 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 Exam	ple Compa	iny	Abigail Milne 🂠
📕 Cust	omer Da	shboard	🚯 Search 🔍
Activiti	es for La	st 30 Days	1 Month Performance 4 Month Pipeline
Description	Target	Existing New Custmrs Custmrs	15 000.00
Phone call		0 0	12 000.00
Email		0 0	9 000.00 0.20
Meeting On Site inspectio	40 on 50	0 0 0 0	-6 UUU.NU
Site inspection	2	0 0	3 000.00 0.10
			0.00 0.00 Cases Invoices Orders Quotes Sep 2019 Oct 2019 Nov 2019 Dec 2019
create cold call	P	ns warnings	Liberty Jones - LIB0001 Trading Name Liberty Jones Registered Name Liberty Jones Description Household and Clothing Stores Head Office VAT No
		(000)	Rank Silver Website http://
	-		Created: 2019/09/21 2.27.40 9H Phone 0120230340
customers	cases	activities	
			12 Months Sales History
		<b>↓</b>	0.5
quotes	orders	invoices	0.4
			0.25
$\sim$		0	0.3
	- <b>1</b>	<b>X</b>	0.2
credit notes	equipment	contracts	0.15
			0.05 -
<b>S</b>	~		a the second sec
service calls	3rd party	fies	Contract Income Sales Revenue
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