

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

CRM BASICS

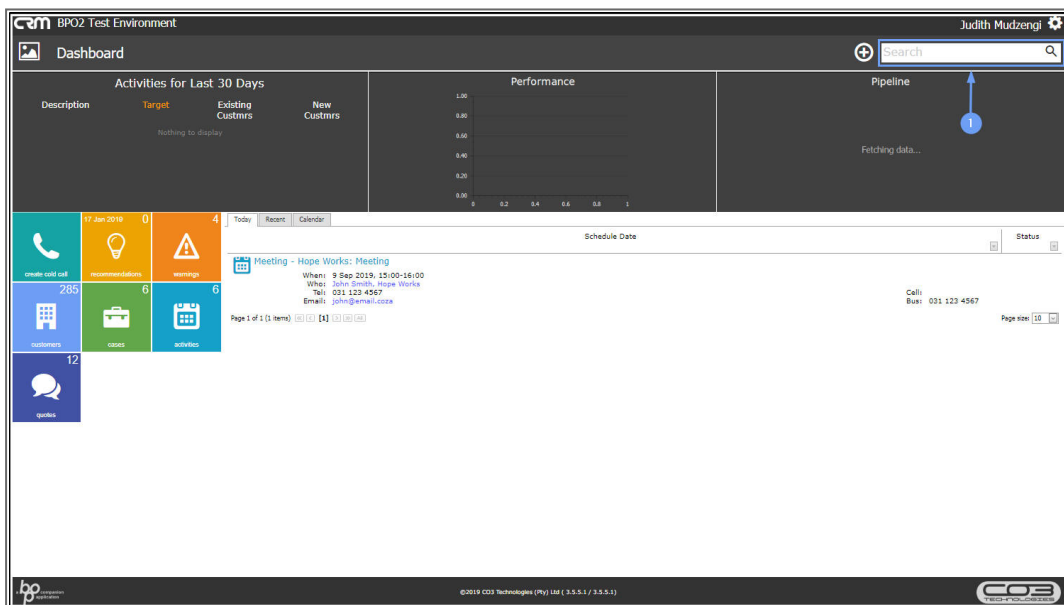
SEARCH CUSTOMER/CLIENT

You can search for a customer using the Customer Name, Trading Name or Registered Name. Just type all or part of the text that you are looking for and press **Enter** on your keyboard or click on the **Search** icon.

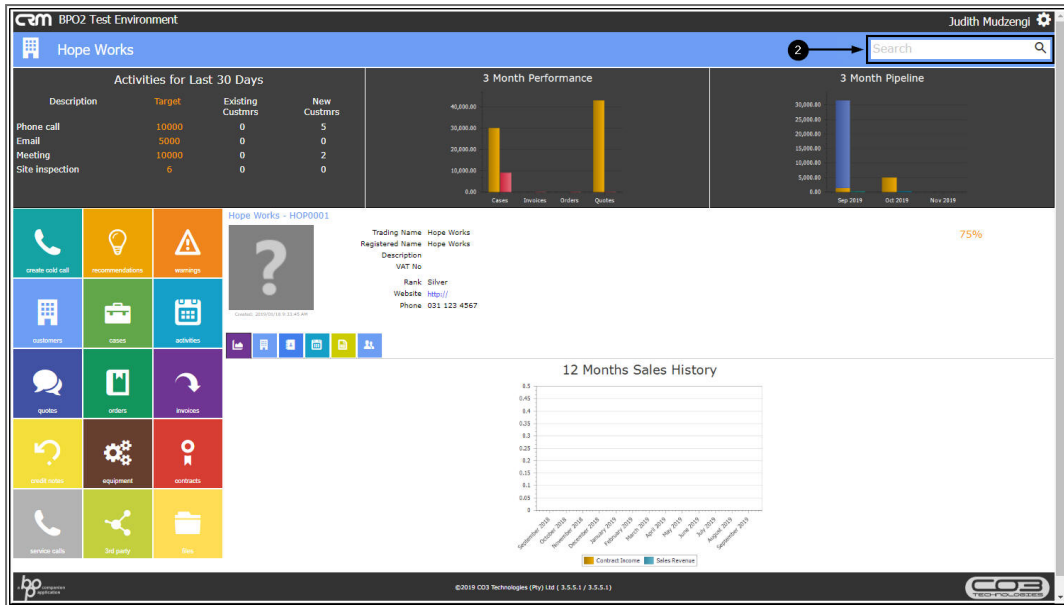
You can also search for a customer by Contact Name.

Ribbon Access: Webpage > [http://\[servername\]:\[port-no\]/BPOCRM/User.aspx](http://[servername]:[port-no]/BPOCRM/User.aspx)

1. You can either access the **Search Bar** from the **Homepage**.



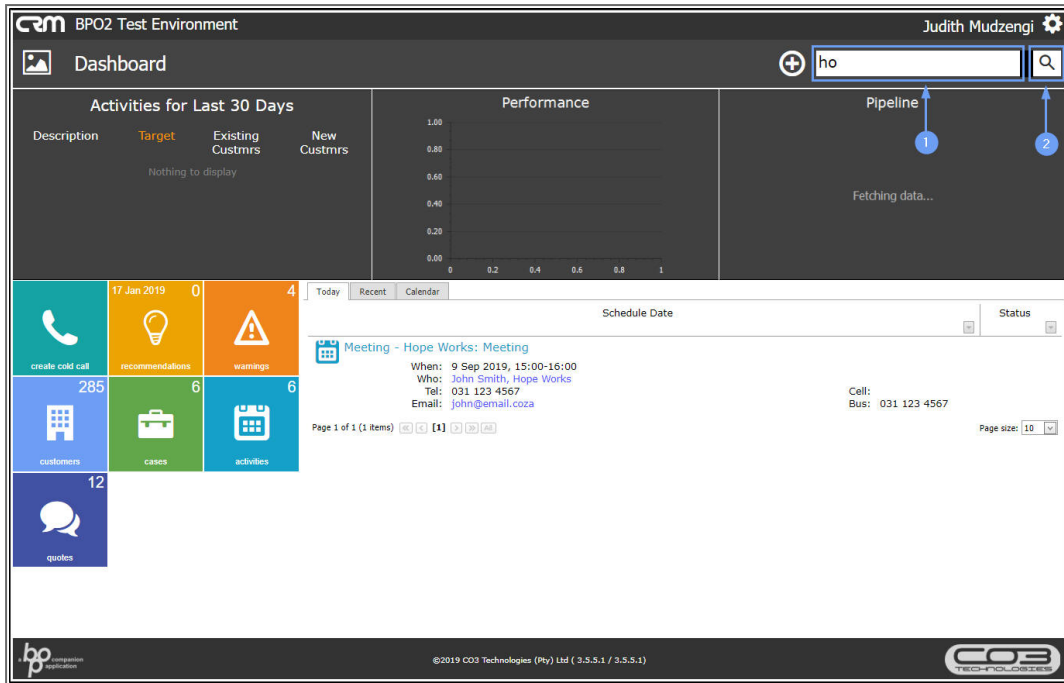
2. or from the **Customer Homepage**.



SEARCH FROM THE HOMEPAGE

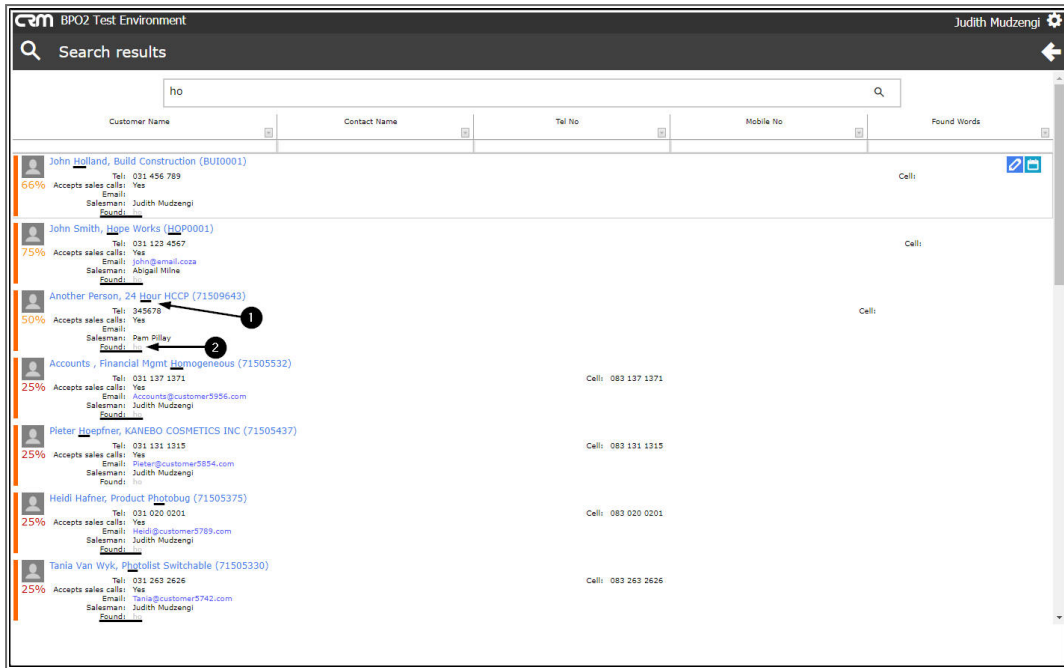
For the purpose of this manual, we will work from the **Homepage**.

1. In the **Search Bar**, type in the search query or Customer Name or Trading Name or Registered Name or Customer Contact .
2. Click on the **Search icon**.



The **Search Results** screen will be displayed.

1. All the customers that have the 'search' word in their customer name / customer contact / trading name / registered name will be displayed.
2. The system will show which part of the 'search' word was found during the search on each result.



1. You can also type in multiple words in the **Search Bar** to refine your search.
2. All the customers that have any part of the 'search' word(s) in their customer name / customer contact / trading name / registered name will be displayed. The search engine will list the 'closest' match(es) higher on the list to help you find the contact you are looking for.
3. The system will show which part of the 'search' word(s) was found during the search on each result.

The screenshot shows a search results page in a CRM system. The search bar contains 'hope wor'. Below the search bar is a table with columns: Customer Name, Contact Name, Tel No, Mobile No, and Found Words. The results are as follows:

Customer Name	Contact Name	Tel No	Mobile No	Found Words
John Smith, Hope Works (HOP0001)		031		
Theresa Wheeler, JIRA Networked (71505555)		031 215 415	061 512 415	
Johan van Staden, Framework HCFA (71505361)		031 039 0388	083 039 0388	
Makos, Alliance IAR Embedded Workbench (71505341)		031 312 3122	083 312 3122	
Lizelle Bairstow, Framework HCFA (71505361)		031 039 0388	083 039 0388	

Annotations in the image: 1 points to the search bar, 2 points to the 'Tel:' field of the first result, and 3 points to the 'Found:' field of the first result.

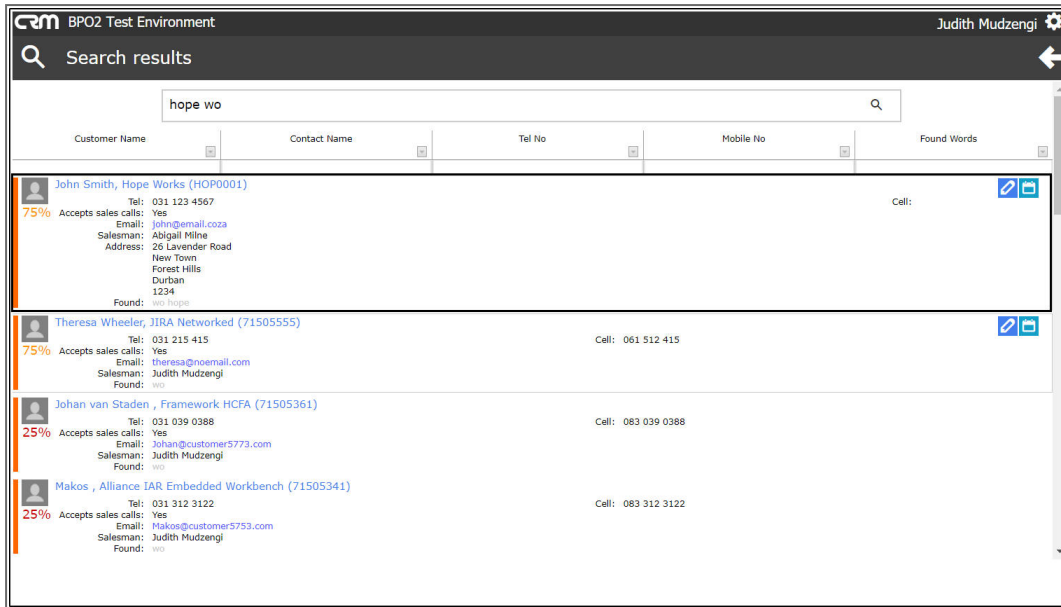
- Click on the on the item you wish to view more details for.

The screenshot shows the same search results page, but with the first result, 'John Smith, Hope Works (HOP0001)', expanded to show more details. The details for this result are:

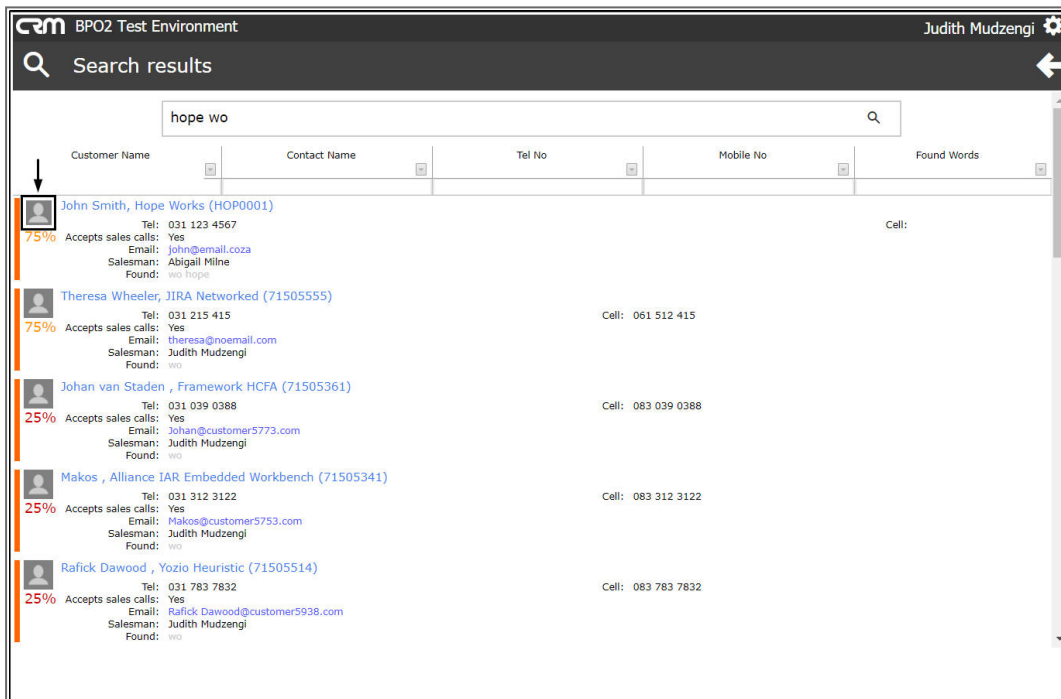
- 75% Accepts sales calls: Yes
- Tel: 031 123 4567
- Email: john@email.co.za
- Salesman: Abigail Milne
- Found: wo

The other results in the table remain the same as in the previous screenshot.

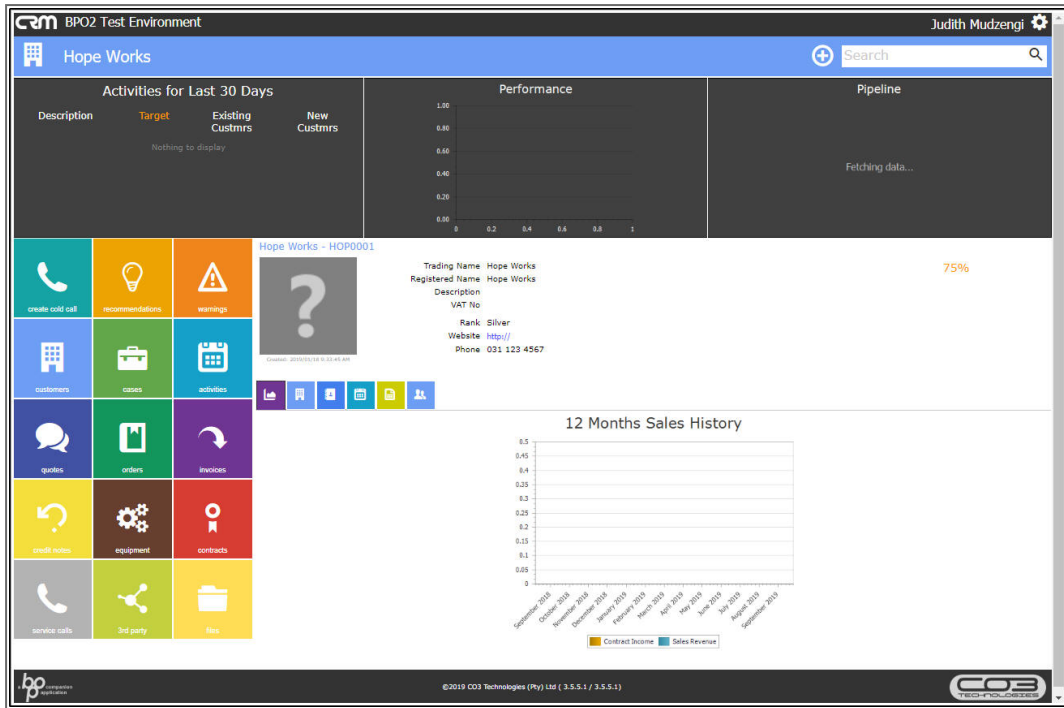
- More details of the item will be displayed.



- Click on the **View** icon of the customer you wish to observe.



The **Customer Homepage** will be displayed.



- Hover over an item.
- The following action items will be displayed:
 1. View / Edit this Contact
 2. Create a new case and activity for this contact

Note: You can only view / edit a contact or create a new case and activity for customers where **(a)** you are the main salesman or linked salesmen, and **(b)** where the customer has addresses configured.

CRM BPO2 Test Environment
Judith Mudzengi

Search results

Customer Name	Contact Name	Tel No	Mobile No	Found Words
John Smith, Hope Works (HOP0001) 75% Accepts sales calls: Yes Email: john@email.co.za Salesman: Abigail Milne Found: wo hope				Cell:
Theresa Wheeler, IIRA Networked (71505555) 75% Accepts sales calls: Yes Email: theresa@noemail.com Salesman: Judith Mudzengi Found: wo			Cell: 061 512 415	
Johan van Staden, Framework HCFA (71505361) 25% Accepts sales calls: Yes Email: johan@customer5773.com Salesman: Judith Mudzengi Found: wo			Cell: 083 039 0388	
Makos, Alliance IAR Embedded Workbench (71505341) 25% Accepts sales calls: Yes Email: Makos@customer5753.com Salesman: Judith Mudzengi Found: wo			Cell: 083 312 3122	
Rafick Dawood, Yozio Heuristic (71505514) 25% Accepts sales calls: Yes Email: Rafick.Dawood@customer5938.com Salesman: Judith Mudzengi Found: wo			Cell: 083 783 7832	

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