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

CRM BASICS

DASHBOARD SETTINGS OPTIONS

CRM is designed with the Salesman in mind. All information viewed is specific to the user that is logged in. This user, sees only his/her Customers, Cases, Activities, Pipeline, etc. and can plan accordingly.

SETTINGS OPTIONS OVERVIEW

You can open the Settings frame to access **4** different settings Options:

Show items for subordinates

- If you are a Sales Manager, you can view your team's information by selecting **Show items for subordinates** in the Dashboard (Home page). Your team is defined by the employee hierarchy / Organisational Chart in Nucleus Service. Each employee within the sales team needs to have their sales manager set up as Manager when adding or editing an employee.

Exclude deleted customers in search on Cold Call screen

- Selecting this option means that only **Active** customers will display in the selection lists when you are doing a search for a customer or contact.

Hide dashboard panel

- Selecting this option will hide the Dashboard panel in both the Home page and the Customer Home page, giving more space to view other details in both of those pages.

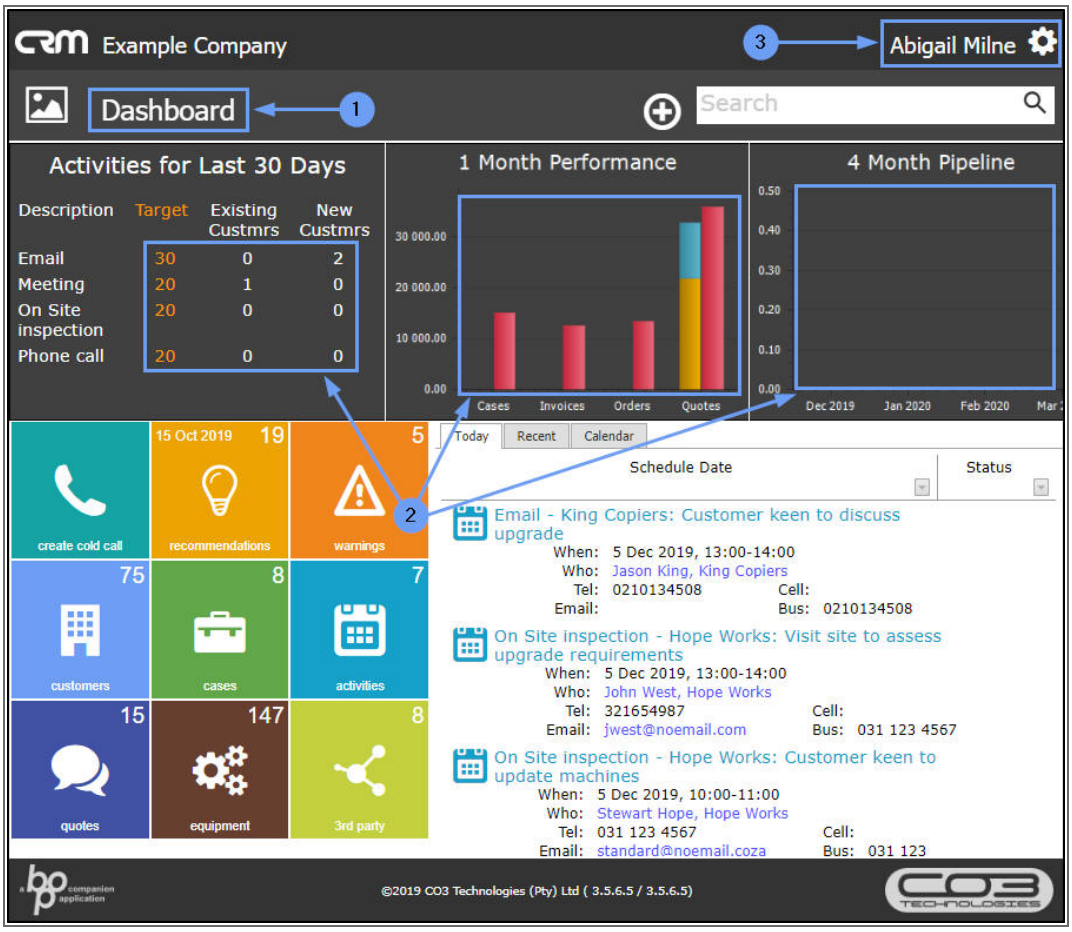
Hide dashboard panel on customer page

- Selecting this option will only hide the Dashboard panel in the Customer Home page, giving more space to view other details in this page.

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

SHOW ITEMS FOR SUBORDINATES

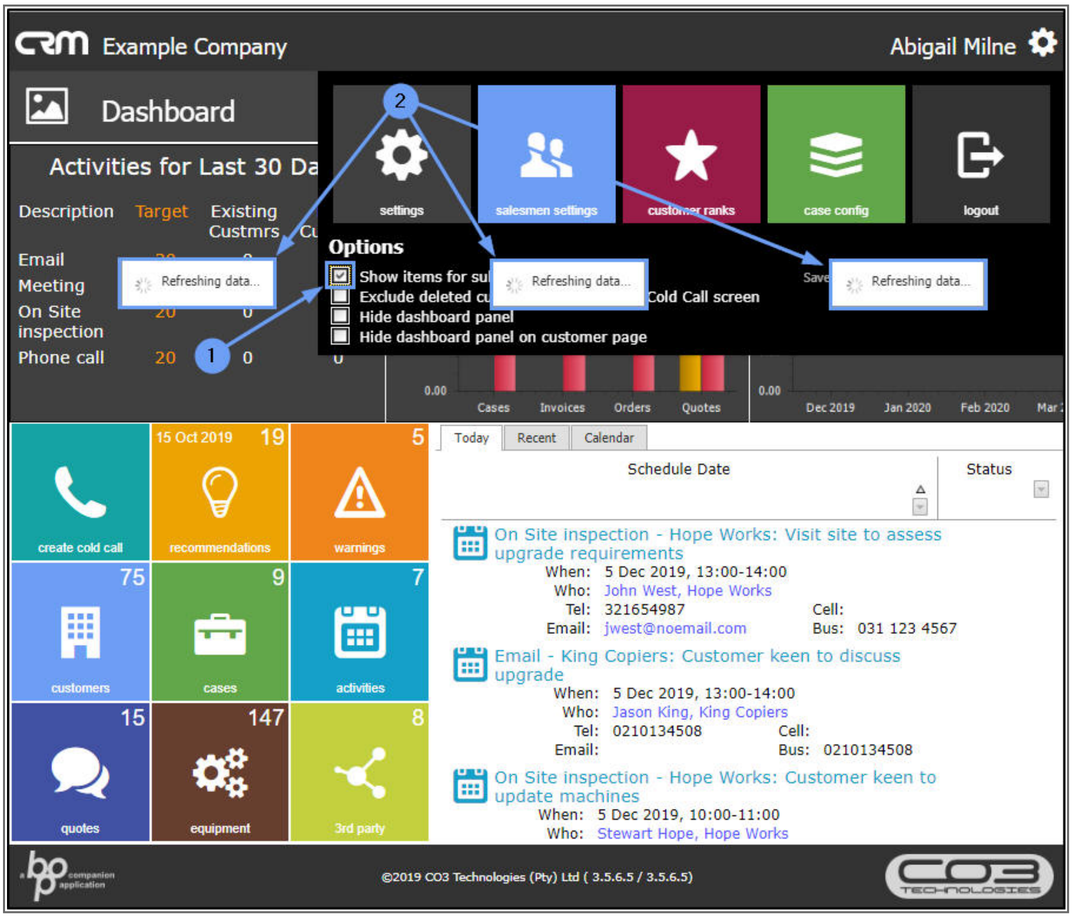
1. In the **Home** page (Dashboard),
2. Note the figures in the **Activities for Last 30 Days** frame and the bar graph amounts in the **1 Month Performance** frame and the **4 Month Pipeline** frame.
3. **Hover over** or click on the **User Name** or **Settings** icon



1. The **Settings** frame will expand and the
2. **Options** list will be displayed.
3. Select the **Show items for subordinates** check box.

1. As you select the check box,
2. The 3 Dashboard frames:
    i. **Activities for the Last 30 Days**
    ii. **1 Month Performance**
    iii. **4 Month Pipeline**

    will automatically refresh.



Click anywhere outside of the expanded Settings frame to collapse it.

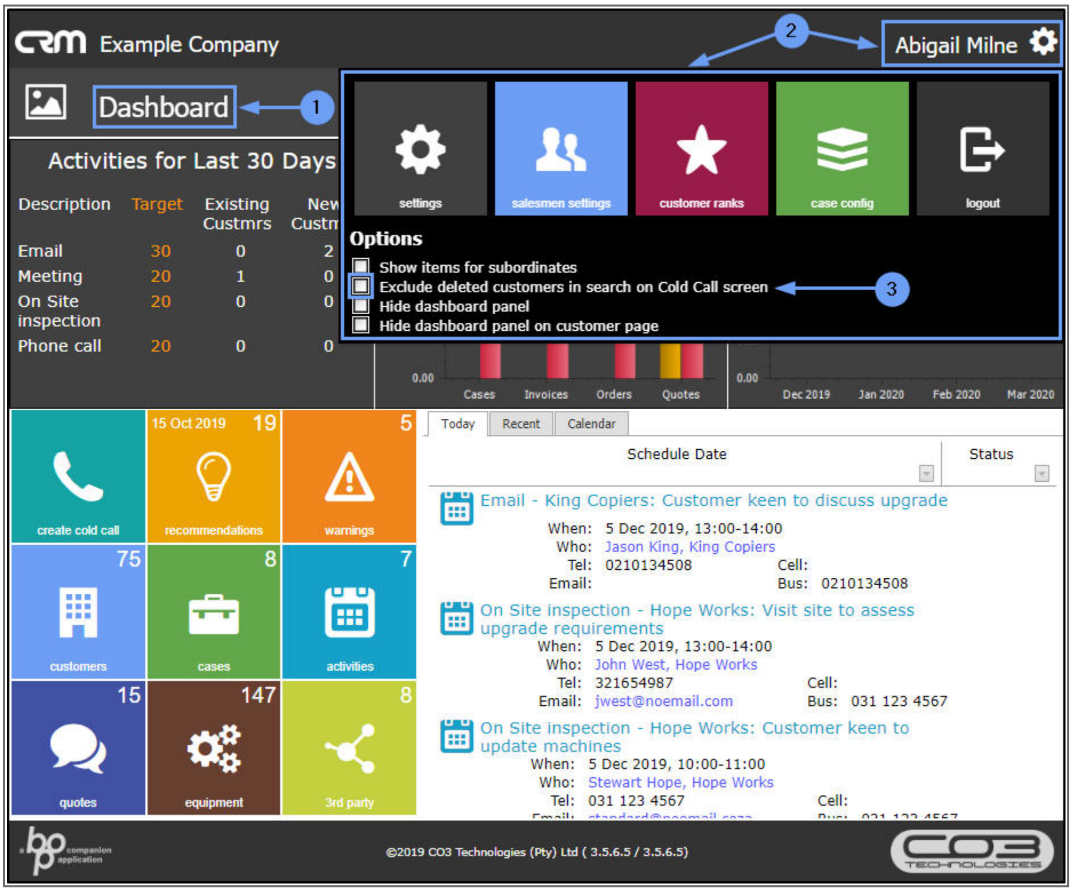
1. The figures in the 3 Dashboard frames:
   i. **Activities for the Last 30 Days**
   ii. **1 Month Performance**
   iii. **4 Month Pipeline**

   will now include the subordinates statistics.

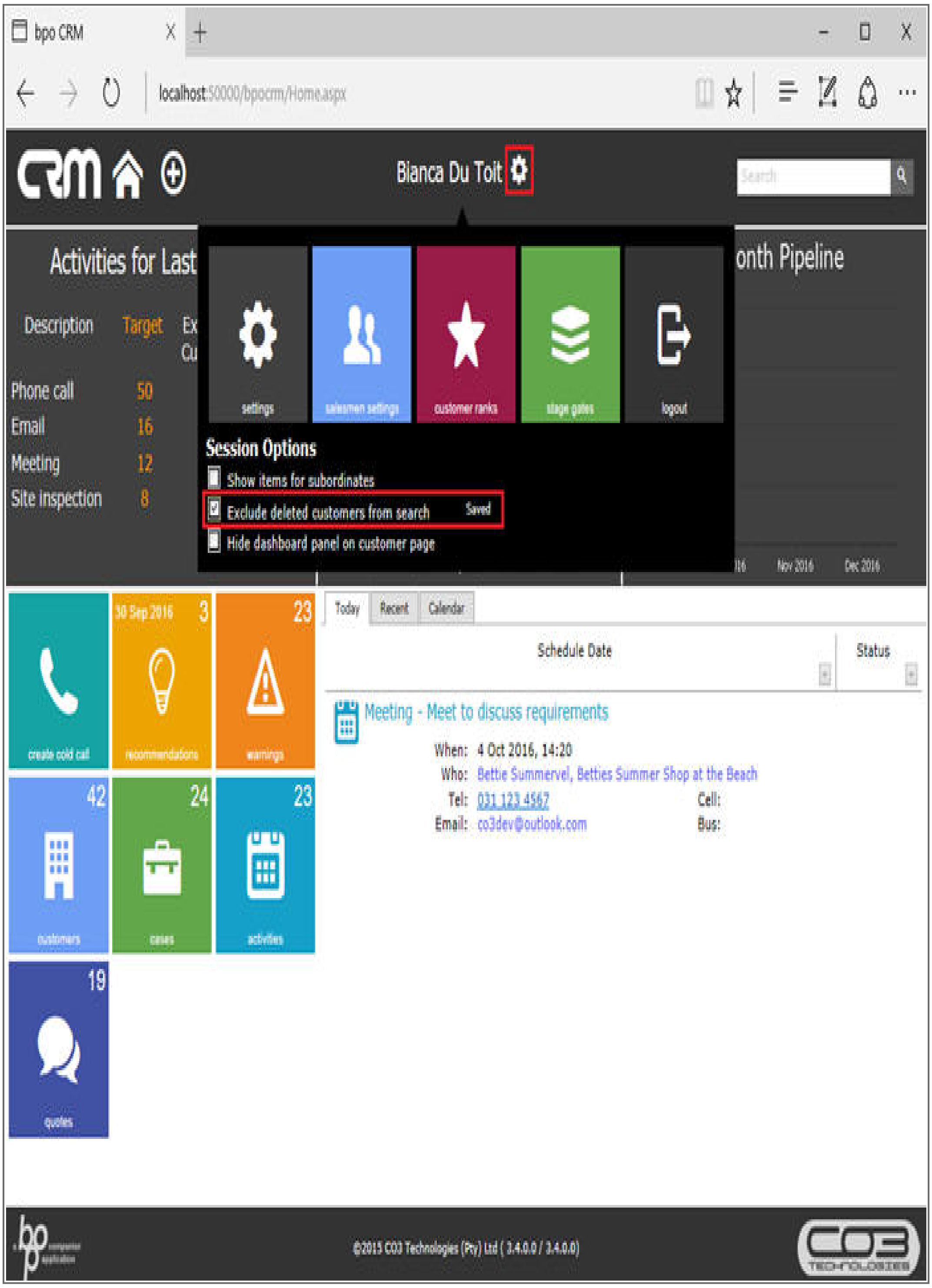
EXCLUDE DELETED CUSTOMERS ON COLD CALL SCREEN

This will show only the Active customers when you are doing a search for a customer or contact.

1. In the **Home** page,
2. **Hover over** or click on the **User Name** or **Settings** icon to display the **Settings** frame.
3. In the **Options** list, select the **Exclude deleted customers in search on Cold call screen** check box.



View the results of this selection here...(tba)


bpo CRM
localhost:50000/bpocrm/Home.aspx
Bianca Du Toit
Activities for Last
onth Pipeline
Description
Target
Phone call
50
Email
16
Meeting
12
Site inspection
8
settings
salesmen settings
customer ranks
stage gates
logout
Session Options
Show items for subordinates
Exclude deleted customers from search
Saved
Hide dashboard panel on customer page
create cold call
recommendations
warnings
customers
cases
activities
quotes
Today
Recent
Calendar
Schedule Date
Status
Meeting - Meet to discuss requirements
When: 4 Oct 2016, 14:20
Who: Bettie Summervel, Betties Summer Shop at the Beach
Tel: 031 123 4567
Cell:
Email: co3dev@outlook.com
Bus:
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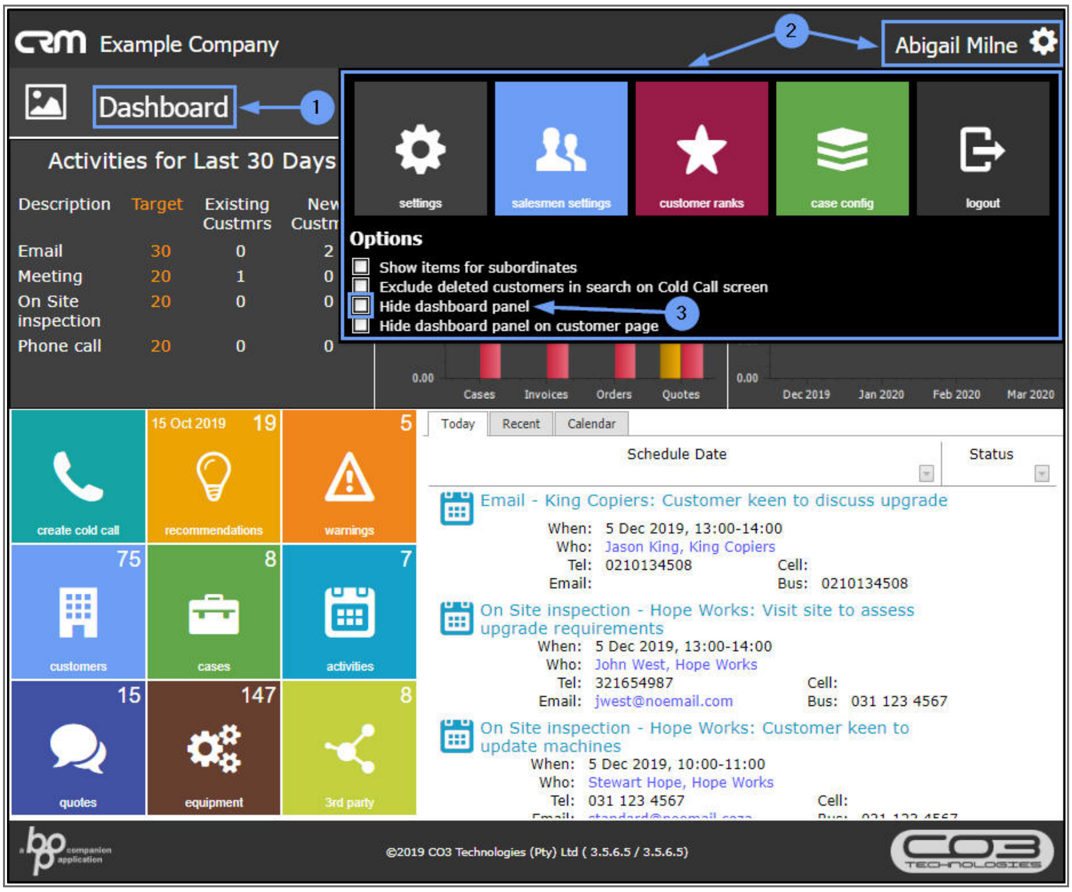
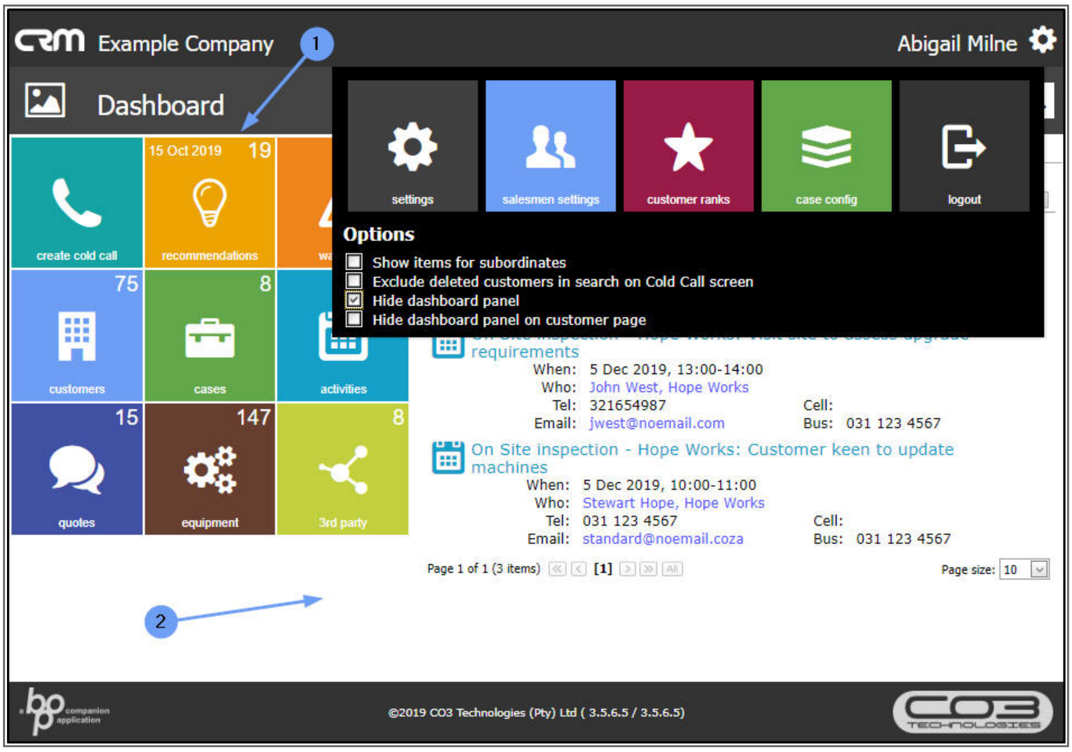
HIDE DASHBOARD PANEL

Hiding the Dashboard panel will give you more space to view the details on your Home page and Customer Home page.

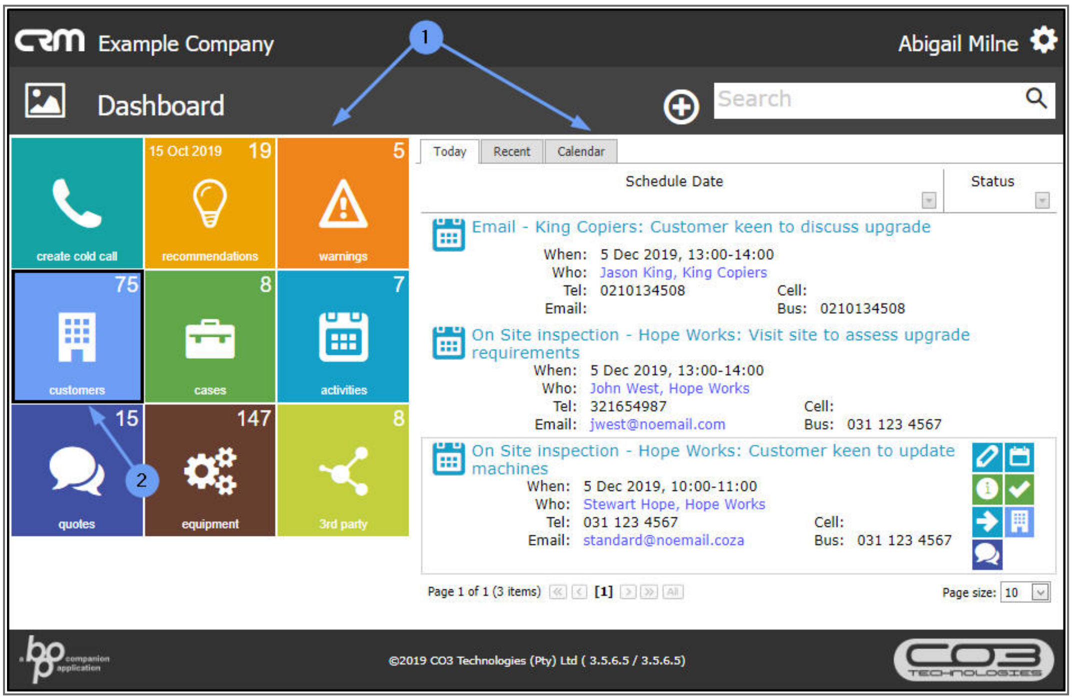
1. In the **Home** page (Dashboard),
2. Hover over or click on the **User Name** or **Settings** icon to display the **Settings** frame.
3. In the **Options** list, select the **Hide Dashboard panel** check box.



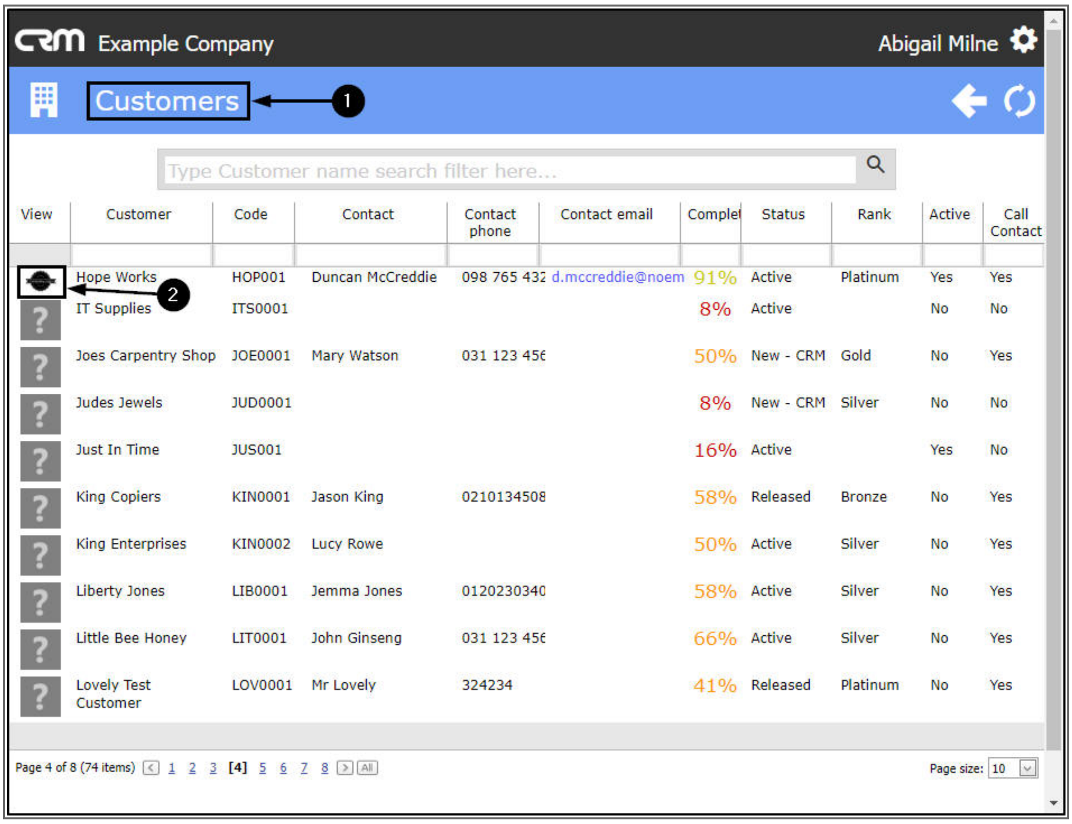
1. The Dashboard will be removed from the Home page.
2. Click anywhere outside of the Settings panel to collapse it to view the Home page fully.



1. You can now view the Home page without the Dashboard.
2. Click on the **Customers** tile.



1. The **Customers** listing page will open.
2. Select any Customer by clicking on the **Customer icon** in the **View** column.

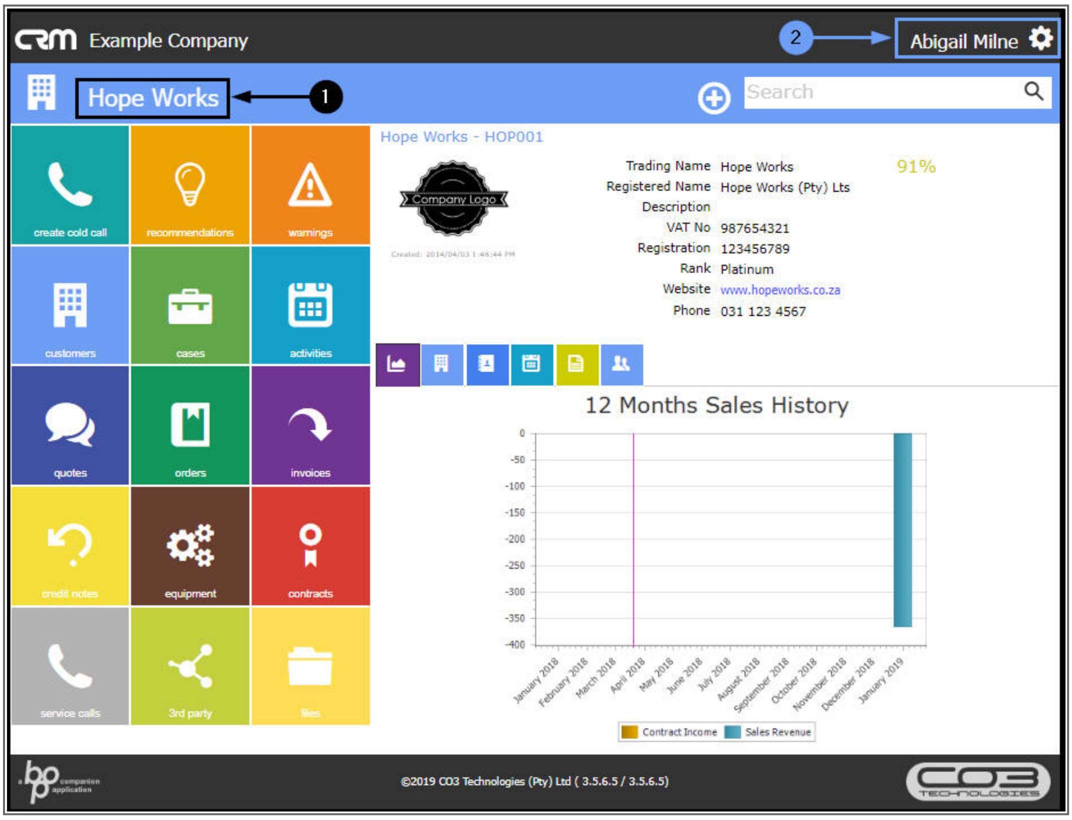


1. The selected **Customer Home** page will open.
2. The Dashboard will also be hidden in this page.

RE-INSTATE THE DASHBOARD VIA CUSTOMER HOME PAGE

The process to **re-instate** the Dashboard is the same from either the **Home page** or **Customer** Home page. For the purpose of this manual we explain the process from the **Customer** Home page.

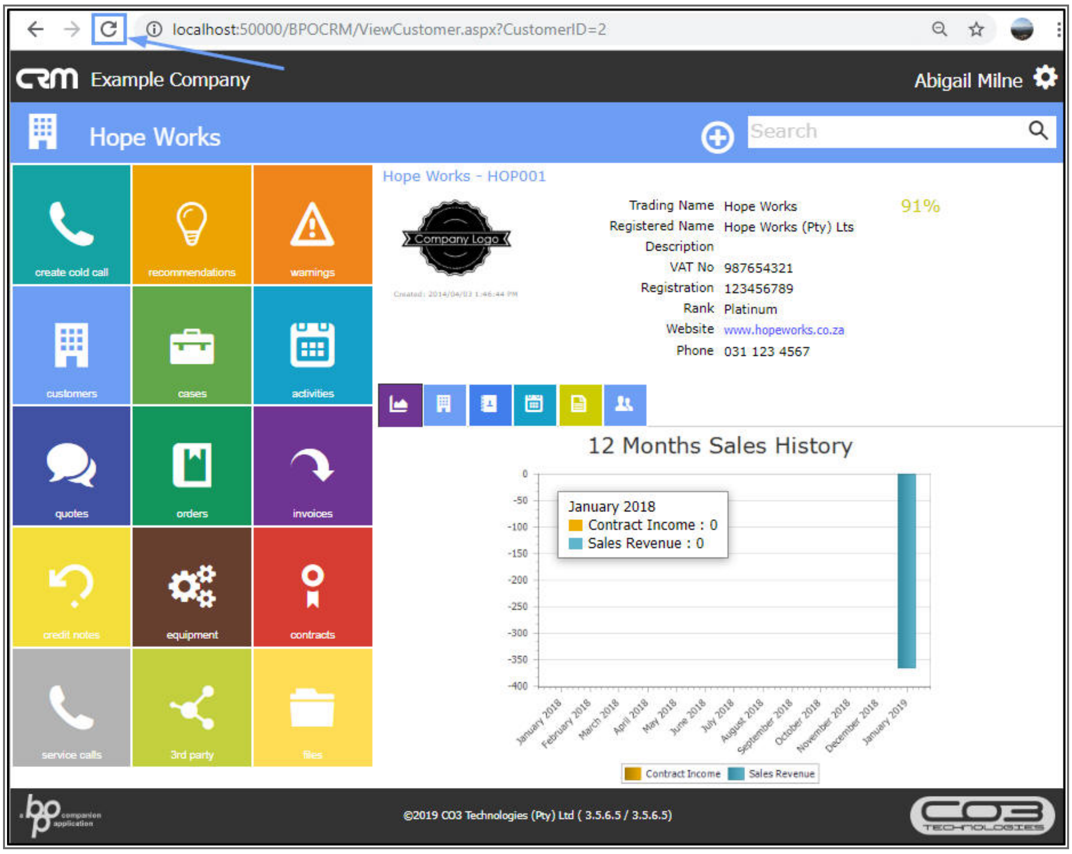
1. In the **Customer** Home page,
2. Hover over or click on the **User Name** or **Settings** icon.



1. The **Settings** frame will be displayed.
2. **Deselect** the **Hide Dashboard panel** check box.

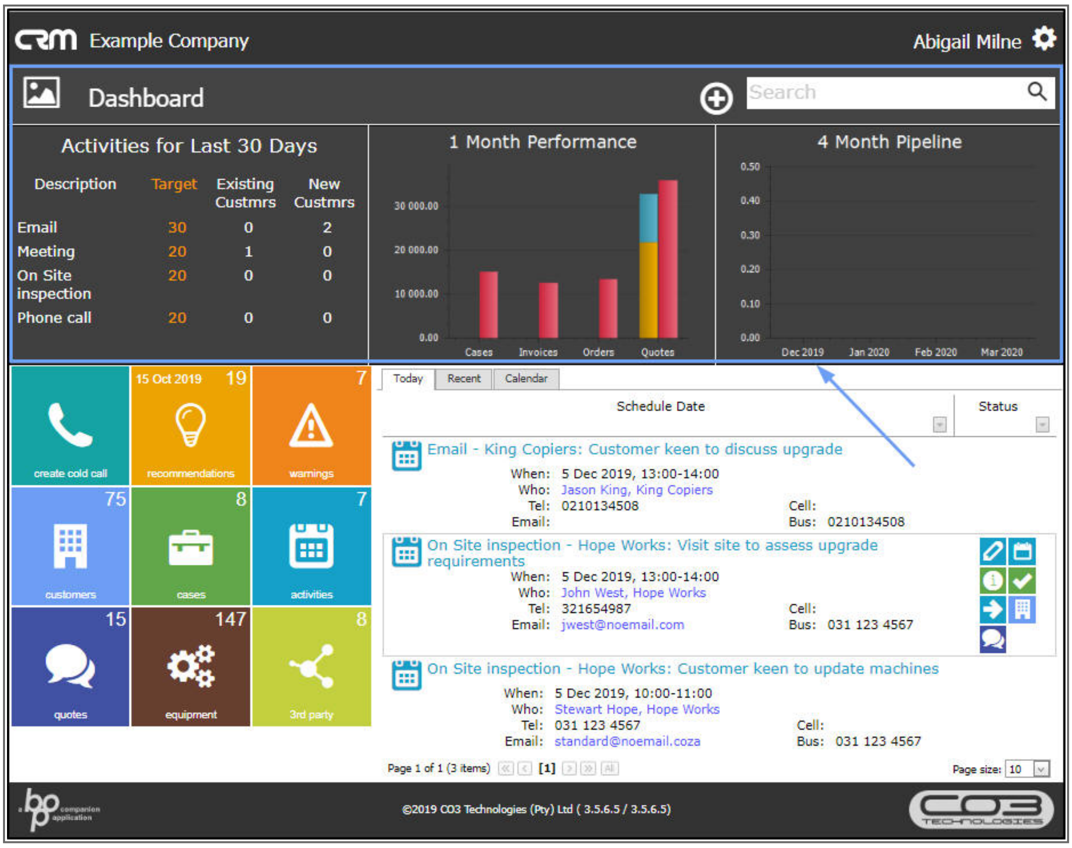
1. As you deselect the Hide Dashboard panel option,
2. A message box will pop up in the Settings panel advising you to
   - **Refresh page to show dashboard.**

- **Refresh** the page.



1. The Dashboard panel can now be viewed in the Customer Home page.
2. Click on the **CRM logo** to return to the **Home** page.

1. The Dashboard panel can also now be viewed in the **Home** page again.



HIDE DASHBOARD PANEL ON CUSTOMER PAGE

Hiding the Dashboard panel on the Customer Home page will give you more space to view the details in this page. This selection will not hide the Dashboard panel on the Home page.

You can select this setting option either from the **Home** page or from the **Customer Home** page.

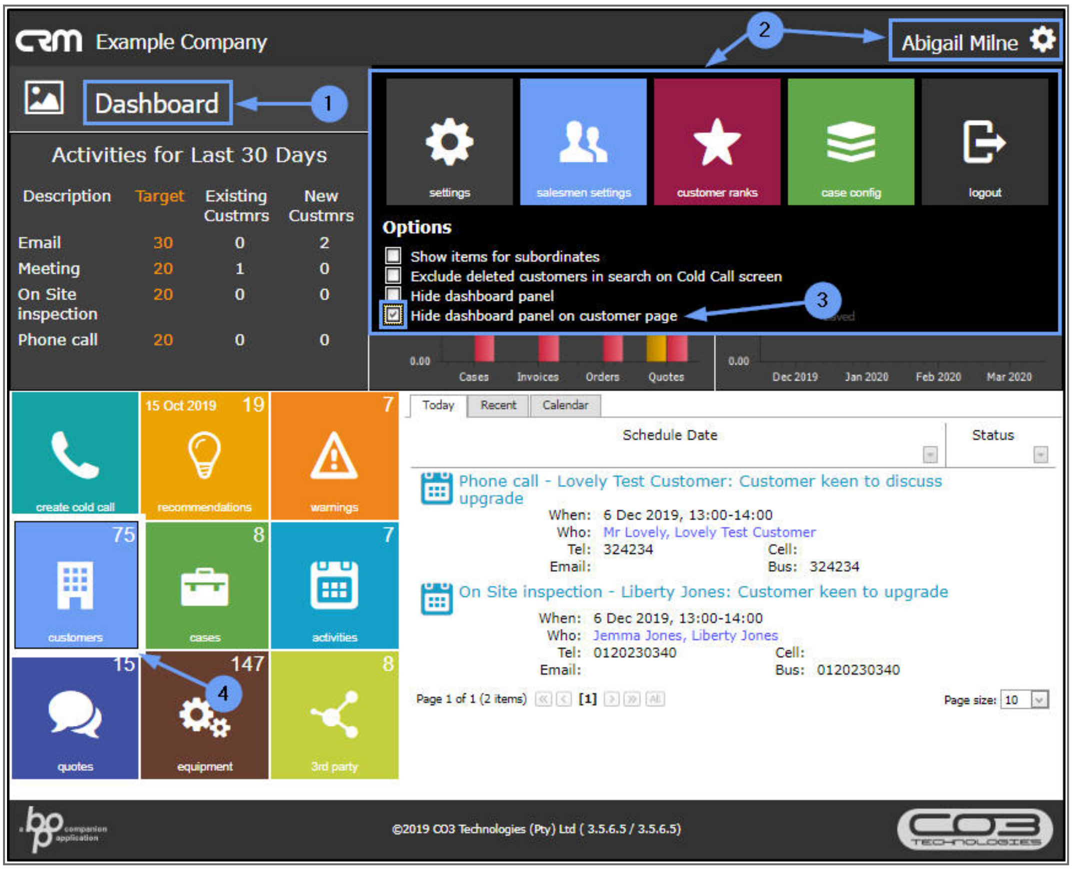
SELECT OPTION FROM HOME PAGE

1. In the **Home** page,
2. Hover over or click on the **User Name** or **Settings** icon to display the **Settings** frame.

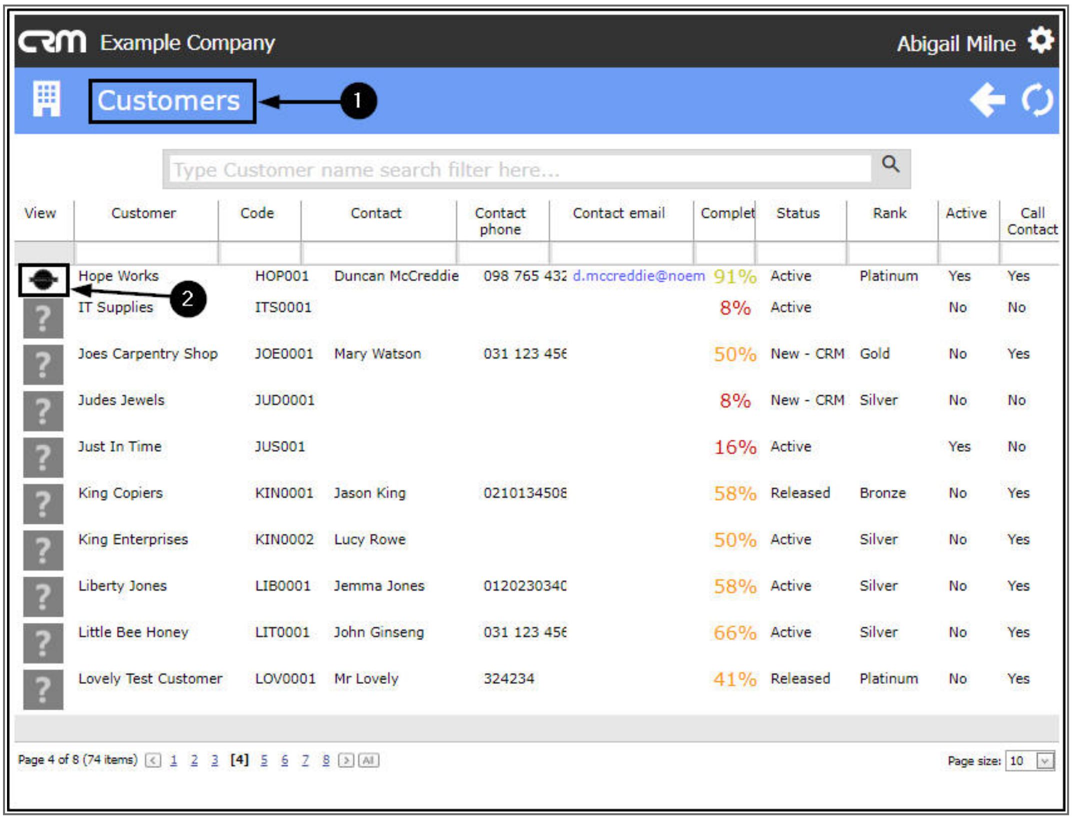
3. In the **Options** list, select the **Hide dashboard panel on customer page** check box.

   To see the result of this selection, you will need to navigate to a **Customer Home** page.

4. Click on the **Customers** tile.



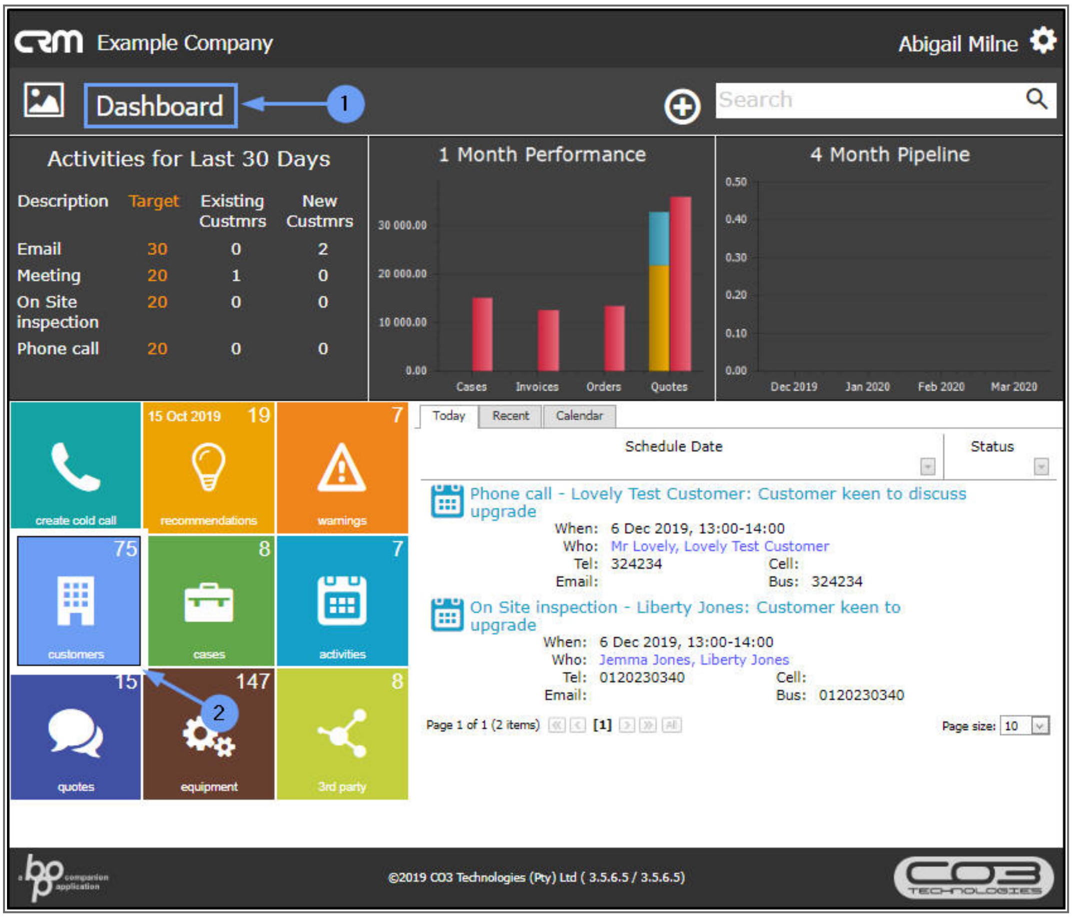
1. The **Customers** listing page will open.
2. Click on any **Customer icon** in the **View** column.



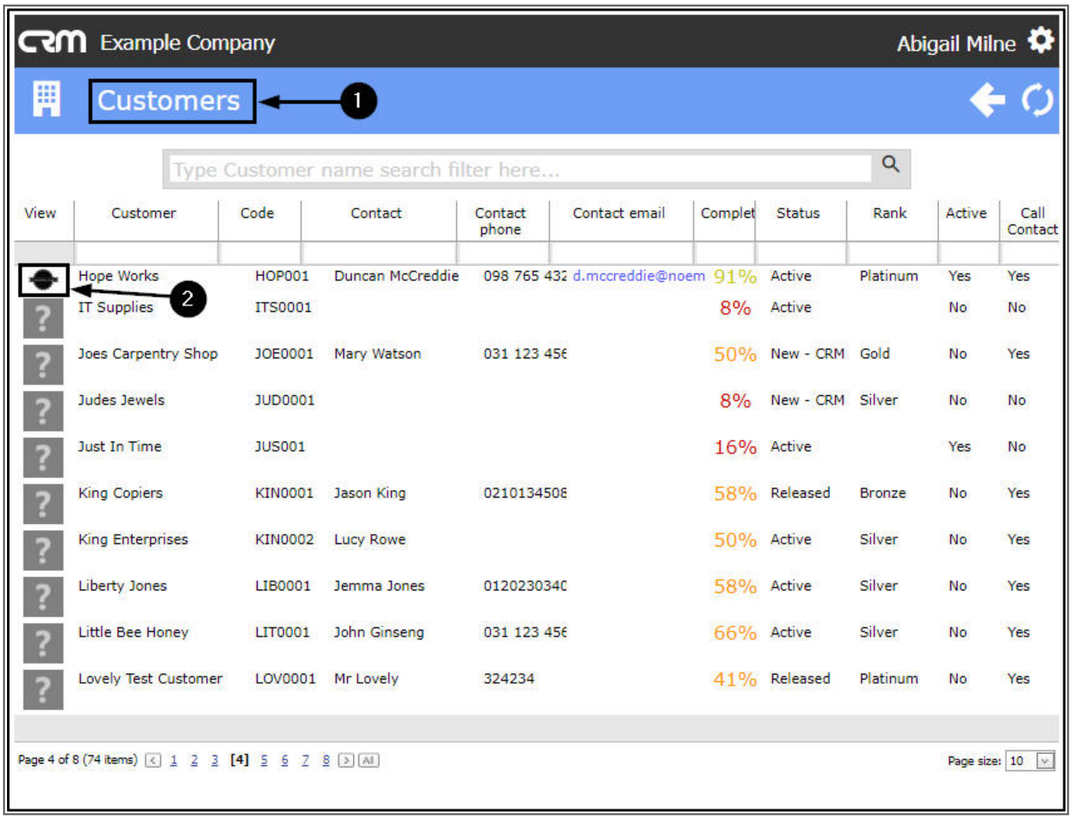
1. The **Customer Home** page will open.
2. The Dashboard will be **hidden** in this page.
3. Click on the **CRM logo** to return to the Home page.

SELECT OPTION FROM CUSTOMER HOMEPAGE

1. In the **Home** page,
2. Click on the **Customers** tile.



1. The **Customers** listing page will open.
2. Click on a **Customer icon** in the **View** column.



1. The **Customer Home** page will open.
2. Hover over or click on the **User Name** or **Settings** icon to display the **Settings** frame.
3. In the **Options** list, select the **Hide Dashboard panel on customer page** check box.

1. As you **select** the check box,
2. The Dashboard will be **hidden** in the page.
3. Click anywhere outside of the Settings frame to **collapse** it.

1. You can now view the whole page **without** the Dashboard
2. Click on the **CRM logo** to return to the **Home page**.

- The Dashboard is still **visible** in this page.

CRM Example Company
Abigail Milne
Dashboard
Search
Activities for Last 30 Days
Description Target Existing Custmrs New Custmrs
Email 30 0 2
Meeting 20 1 0
On Site inspection 20 0 0
Phone call 20 0 0
1 Month Performance
4 Month Pipeline
Cases Invoices Orders Quotes
Dec 2019 Jan 2020 Feb 2020 Mar 2020
create cold call
15 Oct 2019 19
recommendations
warnings
customers
cases
activities
quotes
equipment
3rd party
Today Recent Calendar
Schedule Date
Status
Phone call - Lovely Test Customer: Customer keen to discuss upgrade
When: 6 Dec 2019, 13:00-14:00
Who: Mr Lovely, Lovely Test Customer
Tel: 324234
Cell:
Email:
Bus: 324234
On Site inspection - Liberty Jones: Customer keen to upgrade
When: 6 Dec 2019, 13:00-14:00
Who: Jemma Jones, Liberty Jones
Tel: 0120230340
Cell:
Email:
Bus: 0120230340
Page 1 of 1 (2 items)
Page size: 10
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