

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

## CRM BASICS

### THIRD PARTY

Third Party contains information relating to a customer's current (or expired) contract with a third party provider.

This is helpful for the various reasons including the following:

- To know when to contact your client as their third party contract ends / is due to end.
- To know what your client's current **Item(s)** and **Item(s) Usage** charges are, so that when you create a proposal or quote - you can ensure that it is competitive.

In **CRM** , you can access current Third Party information for a customer in **2** different pages:

1. From the CRM **Homepage**. This will direct you to the **Third Party for [Salesman's Name] Customers** page:
  - This will list all the salesman's customers that are linked to Third Party contracts.
2. From the **Customer Homepage**. This will direct you to the **Third Party for [Customer Name]** page:
  - This will list all the Third Party contracts linked to the selected customer.

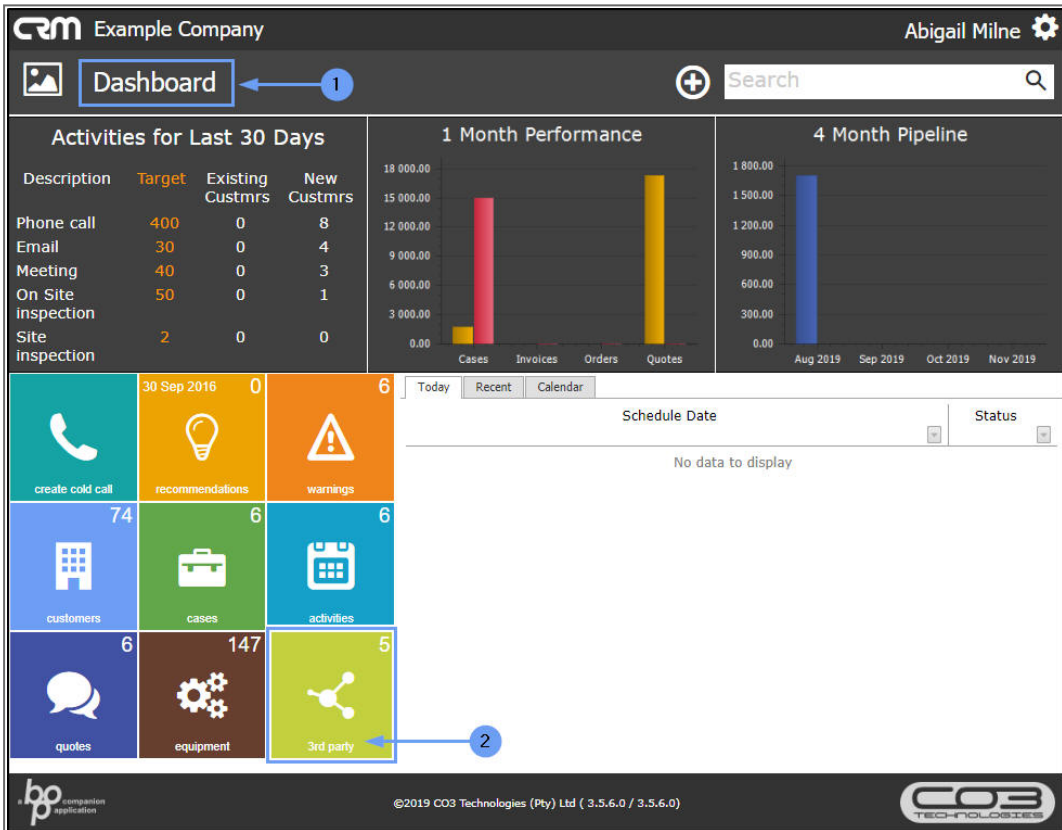
To [Add a new Third Party to a Customer](#), it is quickest to navigate from the Customers (listing) page.

In this manual we will cover the **1st** process; accessing Third Party information from the CRM **Homepage**.

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

## THIRD PARTY HOMEPAGE TILE

1. In the CRM **Homepage**,
2. Click on the **3rd Party** tile.
  - You will note a **number** in the top right corner of this tile - this indicates the **total amount** of Third Party Contracts linked to the salesman's customers.



The screenshot shows the CRM homepage for 'Example Company' with user 'Abigail Milne'. The 'Dashboard' tab is selected, indicated by a blue circle and arrow labeled '1'. The dashboard includes a table for 'Activities for Last 30 Days', two bar charts for '1 Month Performance' and '4 Month Pipeline', and a grid of tiles. The '3rd party' tile, which shows a count of 5, is highlighted with a blue circle and arrow labeled '2'. Other tiles include 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', and 'equipment'. A search bar and a 'Schedule Date' field are also visible.

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	8
Email	30	0	4
Meeting	40	0	3
On Site inspection	50	0	1
Site Inspection	2	0	0

## **THIRD PARTY FOR [SALESMAN'S NAME] PAGE**

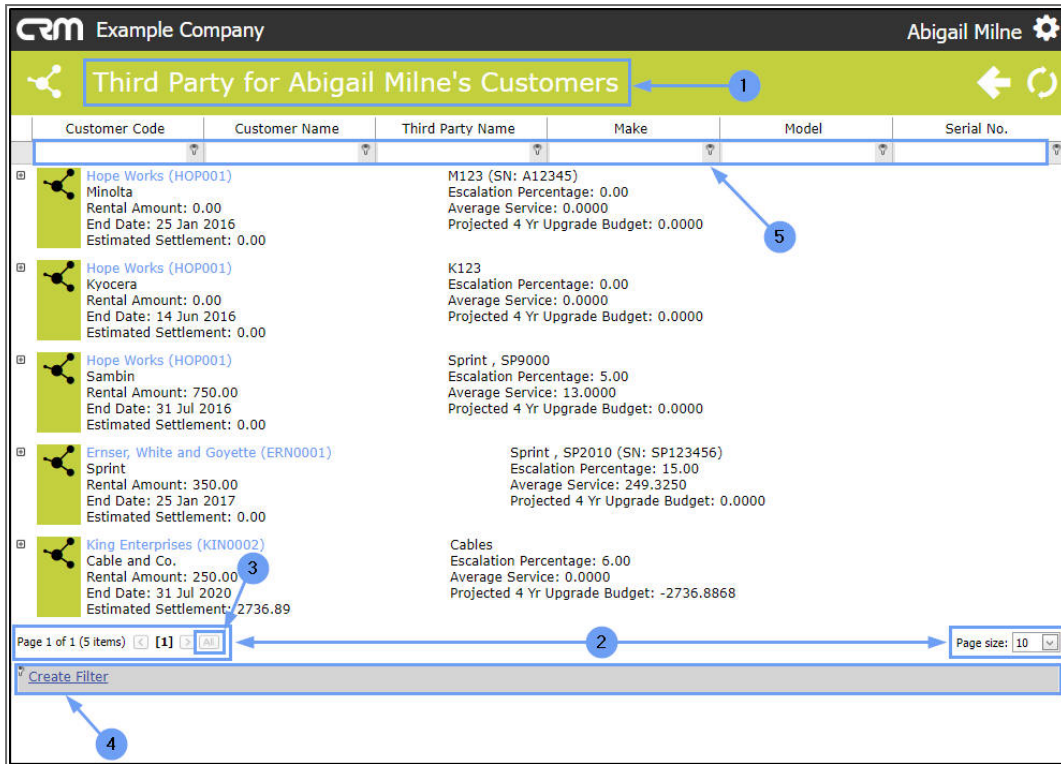
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1. The **Third Party for [Salesman's Name] Customers** page will open.

Here you can view a list of all the salesman's customers linked to third party contracts with a summary of each contract.

For more information on the features and functions in this page, click on the following links:

2. The [Page Reference and Page Size](#) fields
3. The [All](#) Button
4. The [Create Filter](#) row
  - The [Filter Builder](#) screen
  - [Clear the Filter](#) (but keep the filter sequence reference)
  - [Clear the Filter Sequences](#)
5. The [Filter Text Box](#)
  - [Clear the Filter Text Box](#)

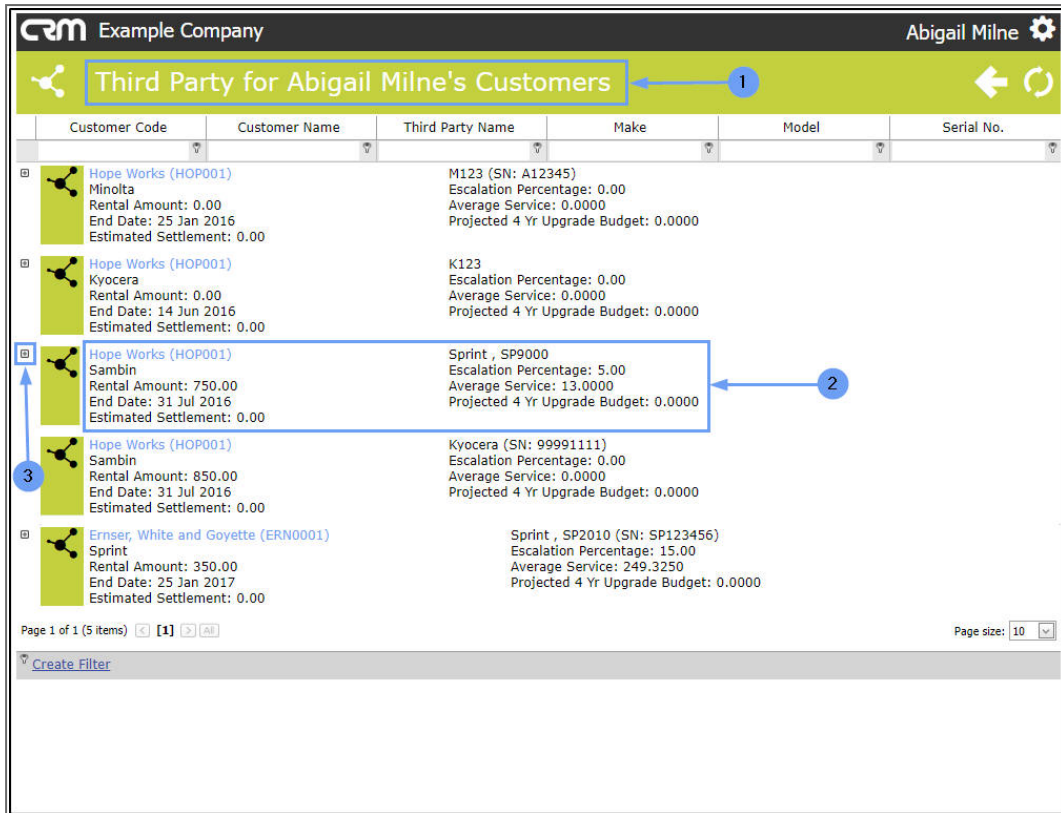


## QUICK VIEW THIRD PARTY 'MAIN' INFORMATION SUMMARY

1. In the **Third Party for**[Salesman's Name]**Customers** page,
2. You can view a summary of the Third Party **main information**.

## QUICK VIEW THIRD PARTY 'ITEM' INFORMATION SUMMARY

3. Click on the **expand** icon in front of the Third Party that you wish to view the Item information of.



1. The selected Third Party frame will expand to reveal a summary of the Third Party **Item**.  
This **Item** section allows you to save information regarding the equipment item itself.

## QUICK VIEW THIRD PARTY 'ITEM USAGE TYPE' INFORMATION SUMMARY

2. Click on the **expand** icon in front of the **Item** frame.

CRM Example Company		Abigail Milne			
Third Party for Abigail Milne's Customers					
Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
Hope Works (HOP001)	Minolta	M123 (SN: A12345)			
	Rental Amount: 0.00	Escalation Percentage: 0.00			
	End Date: 25 Jan 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Kyocera	K123			
	Rental Amount: 0.00	Escalation Percentage: 0.00			
	End Date: 14 Jun 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Sambin	Sprint , SP9000			
	Rental Amount: 750.00	Escalation Percentage: 5.00			
	End Date: 31 Jul 2016	Average Service: 13.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Sprint , SP9000 (Equipment)					
Location:		Serial No:			
Rental Amount: 750.00		Main user:			
Instalment Amount: 0.00		Office desk:			
Billing Frequency: Months		Escalation Percentage: 5.00			
Fixed Service Fee: 0.00		Finance Party: Lekker Loans			
Fixed Admin Fee: 0.00		Finance Collects:			
Fixed Insurance: 5.00		Other Fee 1: 0.00			
		Other Fee 2: 0.00			
Hope Works (HOP001)	Sambin	Kyocera (SN: 99991111)			
	Rental Amount: 850.00	Escalation Percentage: 0.00			
	End Date: 31 Jul 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Ernser, White and Goyette (ERN0001)	Sprint	Sprint , SP2010 (SN: SP123456)			
	Rental Amount: 350.00	Escalation Percentage: 15.00			
	End Date: 25 Jan 2017	Average Service: 249.3250			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			

1. The Item frame will expand to reveal the Item **Usage Type** frame with a summary of the usage information.

This frame allows you to add details for the minimum and maximum billing and the cost per copy charges, if applicable.

2. You can now view a summary of each tier of the Third Party:

- **Contract** summary
- **Item** Summary
- Item **Usage Type** summary

← ↻

### Third Party for Abigail Milne's Customers

Rental Amount: 0.00 End Date: 14 Jun 2016 Estimated Settlement: 0.00	Average Service: 0.0000 Projected 4 Yr Upgrade Budget: 0.0000
Hope Works (HOP001) Sambin Rental Amount: 750.00 End Date: 31 Jul 2016 Estimated Settlement: 0.00	Sprint , SP9000 Escalation Percentage: 5.00 Average Service: 13.0000 Projected 4 Yr Upgrade Budget: 0.0000
Sprint , SP9000 (Equipment) Location: Rental Amount: 750.00 Instalment Amount: 0.00 Billing Frequency: Months Fixed Service Fee: 0.00 Fixed Admin Fee: 0.00 Fixed Insurance: 5.00	Serial No: Main user: Office desk: Escalation Percentage: 5.00 Finance Party: Lekker Loans Finance Collects: Other Fee 1: 0.00 Other Fee 2: 0.00
Usage Type	
Usage type: Mono meter Min Billing: 0.00 Free Usage Qty: 0.00 Avg Qty: 2500.00	Per Unit Charge: 0.52 Tier1 Unit Charge: 0.60 Tier1 Usage Limit: 0.70 Tier2 Unit Charge: 0.80 Tier2 Usage Limit: 0.00
Hope Works (HOP001) Sambin Rental Amount: 850.00 End Date: 31 Jul 2016 Estimated Settlement: 0.00	Kyocera (SN: 99991111) Escalation Percentage: 0.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: 0.0000
Ernsler, White and Goyette (ERN0001) Sprint Rental Amount: 350.00 End Date: 25 Jan 2017 Estimated Settlement: 0.00	Sprint , SP2010 (SN: SP123456) Escalation Percentage: 15.00 Average Service: 249.3250 Projected 4 Yr Upgrade Budget: 0.0000

Page 1 of 1 (5 items) [1] [All] Page size: 10

[Create Filter](#)

## VIEW / EDIT AND DELETE ACTION BUTTONS

- You can hover over any of these 3 frames to display the **Action** buttons:

- View/Edit
- Delete

Hope Works (HOP001) Sambin Rental Amount: 750.00 End Date: 31 Jul 2016 Estimated Settlement: 0.00	Sprint , SP9000 Escalation Percentage: 5.00 Average Service: 13.0000 Projected 4 Yr Upgrade Budget: 0.0000	
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Sprint , SP9000 (Equipment) Location: Rental Amount: 750.00 Instalment Amount: 0.00 Billing Frequency: Months Fixed Service Fee: 0.00 Fixed Admin Fee: 0.00 Fixed Insurance: 5.00	Serial No: Main user: Office desk: Escalation Percentage: 5.00 Finance Party: Lekker Loans Finance Collects: Other Fee 1: 0.00 Other Fee 2: 0.00	
--	---	--

Usage Type	
Usage type: Mono meter Min Billing: 0.00 Free Usage Qty: 0.00 Avg Qty: 2500.00	Per Unit Charge: 0.52 Tier1 Unit Charge: 0.60 Tier1 Usage Limit: 0.70 Tier2 Unit Charge: 0.80 Tier2 Usage Limit: 0.00

## VIEW / ADD / EDIT THIRD PARTY 'MAIN' INFORMATION

1. Hover over a Third Party **Main Information** summary to reveal the **Action** buttons:
2. Click on the **View / Edit this Third Party** button.

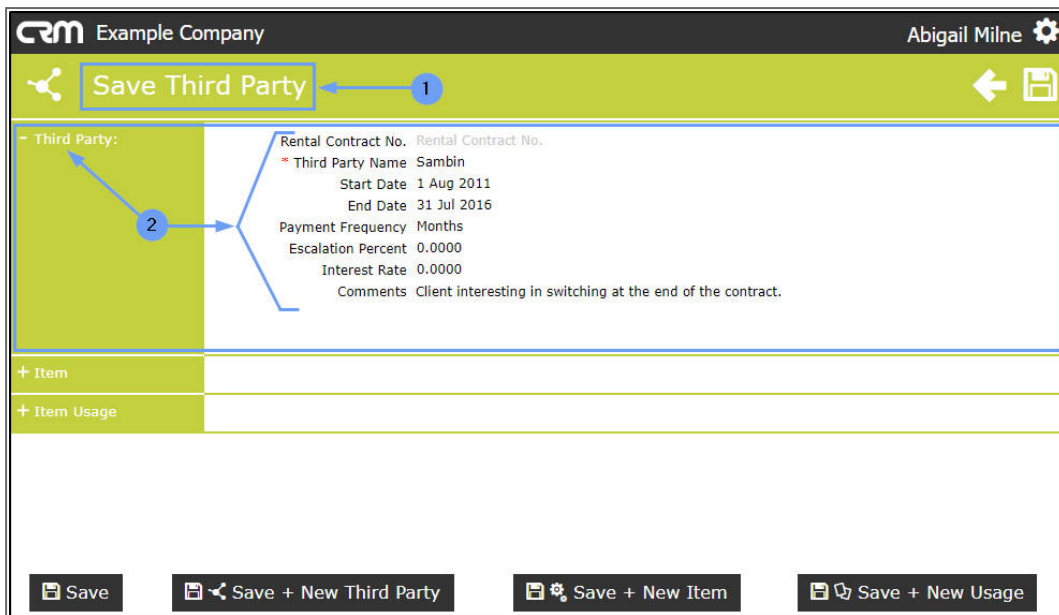
Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
Hope Works (HOP001)	Minolta	M123 (SN: A12345)			
Hope Works (HOP001)	Kyocera	K123			
Hope Works (HOP001)	Sabin	Sprint , SP9000			
Ernser, White and Goyette (ERN0001)	Sprint	Sprint , SP2010 (SN: SP123456)			
King Enterprises (KIN0002)	Cable and Co.	Cables			

1. The **Save Third Party** page will open.
2. The **Third Party** section will be auto-expanded. This section is for entering the **Main Information** regarding the Third Party and the contract details. You can view, add and or edit the details as required:



- **Rental Contract No:** Type in the rental contract no.
- **Third Party Name:** Type in the Third Party name.
- **Start Date:** Click in this field and either type in the start date or click on the drop-down arrow and use the calendar function to select the date.
- **End Date:** Click in this field and either type in the end date or click on the drop-down arrow and use the calendar function to select the end date.
- **Payment Frequency:** Click in this field and select from the drop-down menu the payment frequency (e.g. **monthly**).
- **Escalation Period:** Click in this field and either type in or use the directional arrows to select the escalation percentage.
- **Interest Rate:** Click in this field and either type in or use the directional arrows to select the interest rate.
- **Comments:** Click in this field and type in a comment relating to this Third Party contract, if required.

**Note:** You may not have all the Third Party information, but **CRM** provides fields for all relevant contract information. Fields with a red asterisk (\*) are mandatory.



1. When you have entered or edited the Third Party detail as required, you have several choices in this page:
2. You can expand the Item section and [view / edit / add](#) any 'Item' Information, if applicable.
3. You can expand the Item Usage section and [view / edit / add](#) any 'Item Usage' information, if applicable.

## SAVE OPTIONS

4. Or you can select one of the **Save** options,
5. **Save**,
6. **Save + New Third Party**,
7. **Save + New Item**
8. **Save + New Usage**

CRM Example Company Abigail Milne

## Save Third Party

- Third Party:

Rental Contract No.	Rental Contract No.
* Third Party Name	Sambin
Start Date	1 Aug 2011
End Date	31 Jul 2016
Payment Frequency	Bi-annual
Escalation Percent	5.0000
Interest Rate	0.0000
Comments	Client interested in switching at the end

+ Item

+ Item Usage

Save Save + New Third Party Save + New Item Save + New Usage

## SAVE

- If you click on **Save**,

CRM Example Company Abigail Milne

## Save Third Party

- Third Party:

Rental Contract No.	Rental Contract No.
* Third Party Name	Sambin
Start Date	1 Aug 2011
End Date	31 Jul 2016
Payment Frequency	Bi-annual
Escalation Percent	5.0000
Interest Rate	0.0000
Comments	Client interested in switching at the end

+ Item

+ Item Usage

Save Save + New Third Party Save + New Item Save + New Usage

- The edited details will be **saved** and you will return to the **Third Party for [Salesman's Name] Customers** page.

Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
[icon] Hope Works (HOP001)	Minolta	M123 (SN: A12345)			
	Rental Amount: 0.00	Escalation Percentage: 0.00			
	End Date: 25 Jan 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
[icon] Hope Works (HOP001)	Kyocera	K123			
	Rental Amount: 0.00	Escalation Percentage: 0.00			
	End Date: 14 Jun 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
[icon] Hope Works (HOP001)	Samblin	Sprint , SP9000			
	Rental Amount: 750.00	Escalation Percentage: 5.00			
	End Date: 31 Jul 2016	Average Service: 13.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
[icon] Ernsler, White and Goyette (ERN0001)	Sprint	Sprint , SP2010 (SN: SP123456)			
	Rental Amount: 350.00	Escalation Percentage: 15.00			
	End Date: 25 Jan 2017	Average Service: 249.3250			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
[icon] King Enterprises (KIN0002)	Cable and Co.	Cables			
	Rental Amount: 250.00	Escalation Percentage: 6.00			
	End Date: 31 Jul 2020	Average Service: 0.0000			
	Estimated Settlement: 2736.89	Projected 4 Yr Upgrade Budget: -2736.8868			

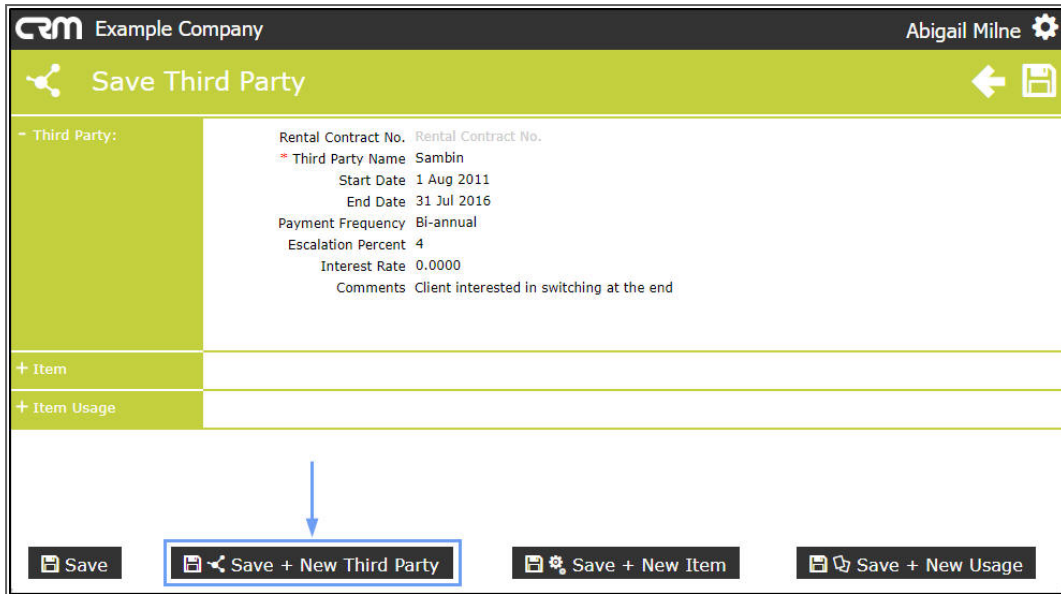
Page 1 of 1 (5 items) [1] Page size: 10

[Create Filter](#)

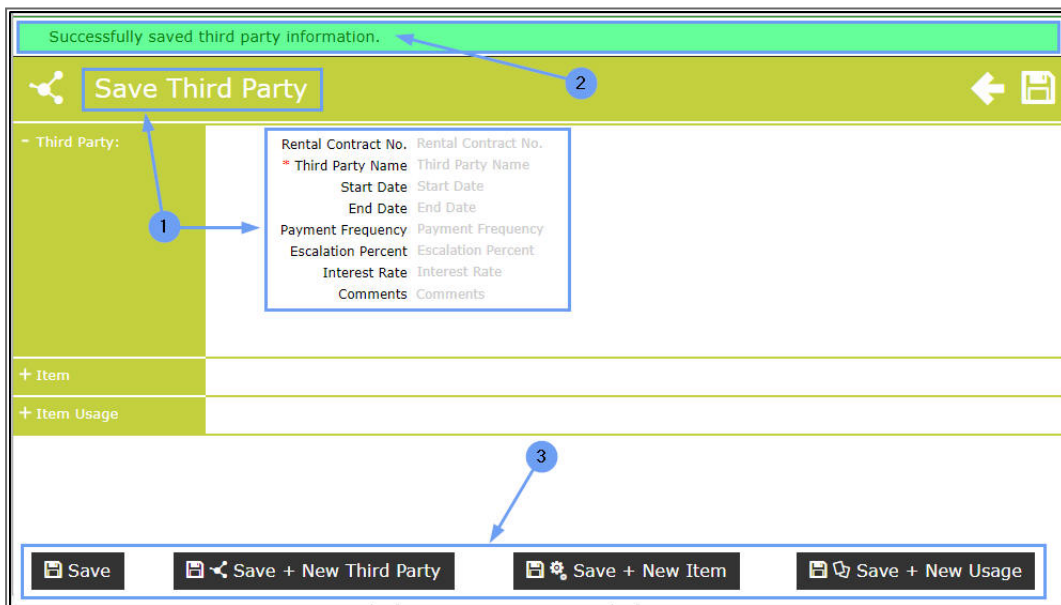
## SAVE + NEW THIRD PARTY

(save all details and add a new Third Party)

- If you click on **Save + New Third Party**,



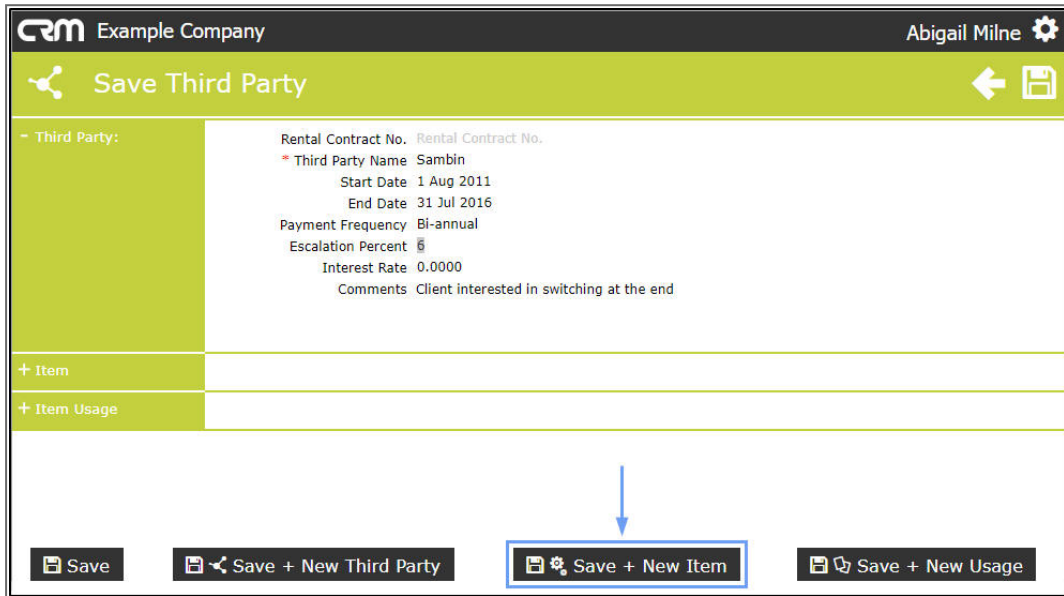
1. The page will **refresh** and clear the Third Party section details, ready for you to add new Third Party details.
2. A message bar will appear at the top of the page stating;
  - **Successfully saved third party information.**
3. Select the appropriate **Save option** to save your changes.



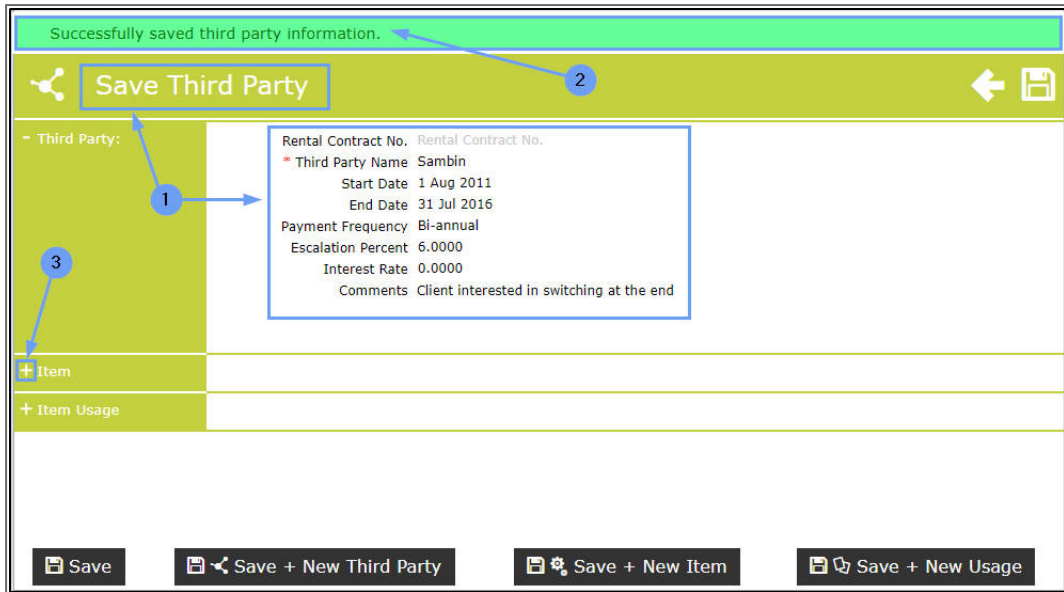
## SAVE + NEW ITEM

(saves all details and adds a new equipment items for the same Third Party)

- If you click on **Save + New Item**,



1. The page will **refresh** but the Third Party details will remain in this page, ready for you to add a **new item** to this Third Party Item section.
2. A message bar will appear at the top of the page stating;
  - **Successfully saved third party information.**
3. Click on the **expand** icon in front of **Item**.



1. The **Item** section will **expand** and the details will have been cleared, ready for you to add new Item details.
2. When you have added the new Item details, select the appropriate **Save option** to save your changes.

Successfully saved third party information.

## Save Third Party

**- Third Party:**

Rental Contract No. Rental Contract No.  
\* Third Party Name **Sambin**  
Start Date 1 Aug 2011  
End Date 31 Jul 2016  
Payment Frequency Bi-annual  
Escalation Percent 6.0000  
Interest Rate 0.0000  
Comments Client interested in switching at the end

**- Item**

Item Type Item Type  
\* Make Make  
Model Model  
Serial Number Serial number  
Location Location  
Description Description

Main User Main User  
Office Desk No Office Desk No  
Rental Amount Rental Amount  
Instalment Amount Instalment Amount  
Escalation Percentage Escalation Percentage  
Billing Frequency Billing Frequency  
Finance Party Finance Party  
Finance Collects Finance Collects  
Fixed Service Fee Fixed Service Fee  
Fixed Admin Fee Fixed Admin Fee  
Fixed Insurance Fixed Insurance  
Other Fee 1 Other Fee 1  
Other Fee 2 Other Fee 2

**+ Item Usage**

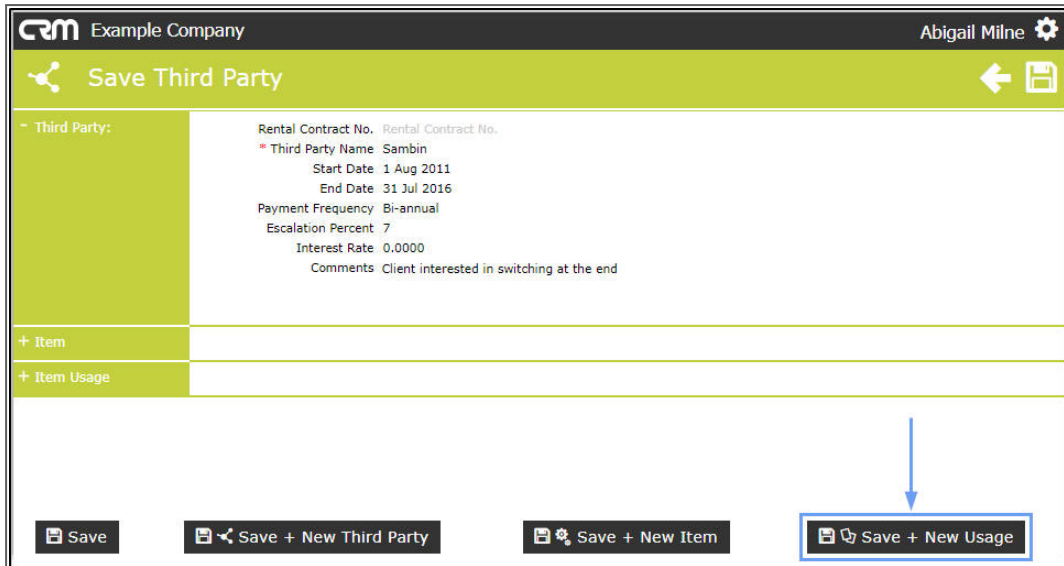
Save Save + New Third Party Save + New Item Save + New Usage

## SAVE + NEW USAGE

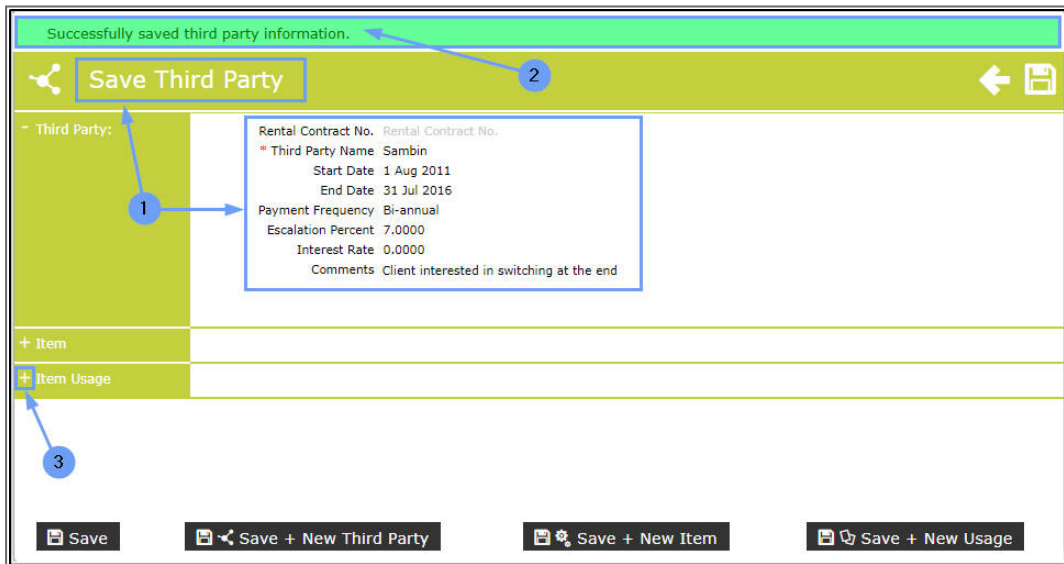
(saves all details and adds new usage for the same machine)

- If you click on **Save + New Usage**,





1. The page will **refresh** but the Third Party details will remain in this page, ready for you to add a new item usage for this Third Party to the **Item Usage** section.
2. A message bar will appear at the top of the page stating;
  - **Successfully saved third party information.**
3. Click on the **expand** icon in front of **Item Usage**.



1. The **Item Usage** section will **expand** and the details will have been cleared, ready for you to add new Item Usage details.
2. When you have added the new Item Usage details, select the appropriate **Save option** to save your changes.

Successfully saved third party information.

← ↻ Save Third Party ← ↻

- Third Party:	Rental Contract No. Rental Contract No. * Third Party Name Sambin Start Date 1 Aug 2011 End Date 31 Jul 2016 Payment Frequency Bi-annual Escalation Percent 7.0000 Interest Rate 0.0000 Comments Client interested in switching at the end
+ Item	
- Item Usage	<div style="border: 1px solid #ccc; padding: 5px;">                     * Note: Usage information will only be saved if you select a Usage/Meter Type and valid Item information is provided above.                 </div> * Usage/Meter Type Usage/Meter Type Minimum Billing Minimum Billing Free Usage Qty Free Usage Qty Average Qty Average Qty Per Unit Charge Per Unit Charge Tier 1 Unit Charge Tier 1 Unit Charge Tier 1 Usage Limit Tier 1 Usage Limit Tier 2 Unit Charge Tier 2 Unit Charge Tier 2 Usage Limit Tier 2 Usage Limit Escalation Percentage Escalation Percentage Billing Frequency Billing Frequency Average 6 Month Spend Average 6 Month Spend Month 1 Spend Month 1 Spend Month 2 Spend Month 2 Spend Month 3 Spend Month 3 Spend Month 4 Spend Month 4 Spend Month 5 Spend Month 5 Spend Month 6 Spend Month 6 Spend

Save Save + New Third Party Save + New Item Save + New Usage

## DELETE THIRD PARTY 'MAIN' INFORMATION

1. In the **Third Party for [Salesman's Name] Customers** page
2. Hover over a selected Third Party summary to reveal the **Action Item** buttons:
3. Click on the **Delete this Third Party** button.

Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
Hope Works (HOP001)	Minolta	M123 (SN: A12345)	Escalation Percentage: 0.00		
Hope Works (HOP001)	Kyocera	K123	Escalation Percentage: 0.00		
Hope Works (HOP001)	Sambin	Sprint , SP9000	Escalation Percentage: 5.00		
Hope Works (HOP001)	Sambin	Kyocera (SN: 99991111)	Escalation Percentage: 0.00		
Ermsy, White and Goyette (ERN0001)	Sprint	Sprint , SP2010 (SN: SP123456)	Escalation Percentage: 15.00		
King Enterprises (KIN0002)	Cable and Co.	Cables	Escalation Percentage: 6.00		

1. A message box will pop up asking;
  - **Are you sure you want to delete this? You cannot undo these changes.**
2. Click on **Ok**.

The screenshot shows a CRM interface for 'Example Company' with a user 'Abigail Milne'. The main area displays a table of 'Third Party for AB' records. The table has columns for 'Customer Code', 'Customer', 'Model', and 'Serial No.'. The last row is highlighted, and a delete icon is visible. A confirmation dialog box is overlaid on the table, asking for confirmation to delete the selected item. The dialog has 'OK' and 'Cancel' buttons. A blue circle '1' points to the delete icon on the last row, and a blue circle '2' points to the 'OK' button.

Customer Code	Customer	Model	Serial No.
Hope Works (HOP001)	Minolta		
Hope Works (HOP001)	Kyocera	K123	
Hope Works (HOP001)	Sambin	Sprint , SP9000	
Hope Works (HOP001)	Sambin	Kyocera (SN: 99991111)	
Ernser, White and Goyette (ERN0001)	Sprint	Sprint , SP2010 (SN: SP123456)	
King Enterprises (KIN0002)	Cable and Co.	Cables	

1. The Third Party will be **removed** from the page.
2. The **Page Reference** field will adjust to account for the deleted Third Party.

Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
Hope Works (HOP001)	Minolta	M123 (SN: A12345)	Escalation Percentage: 0.00	Average Service: 0.0000	Projected 4 Yr Upgrade Budget: 0.0000
Hope Works (HOP001)	Kyocera	K123	Escalation Percentage: 0.00	Average Service: 0.0000	Projected 4 Yr Upgrade Budget: 0.0000
Hope Works (HOP001)	Sambin	Sprint, SP9000	Escalation Percentage: 5.00	Average Service: 13.0000	Projected 4 Yr Upgrade Budget: 0.0000
Hope Works (HOP001)	Sambin	Kyocera (SN: 99991111)	Escalation Percentage: 0.00	Average Service: 0.0000	Projected 4 Yr Upgrade Budget: 0.0000
Ermsr, White and Goyette (ERN0001)	Sprint	Sprint, SP2010 (SN: SP123456)	Escalation Percentage: 15.00	Average Service: 249.3250	Projected 4 Yr Upgrade Budget: 0.0000

Page 1 of 1 (5 items) [1] [2] [3] [4] [5] [6] [7] [8] [9] [10]

Page size: 10

Create Filter

## VIEW / EDIT / ADD THIRD PARTY 'ITEM' INFORMATION

This **Item** section allows you to save information regarding the equipment item itself.

These details are **important** to include, particularly the amounts (e.g. Instalment amount, Service and Admin fees etc.) as you will take all these figures into account (as well as the Item Usage figures) when creating your **proposal** or **quote**. The aim will be to create a better deal for this customer to win their custom.

**Note:** If you need to add multiple equipment items, you can select **Save + New Item** to add another equipment item.

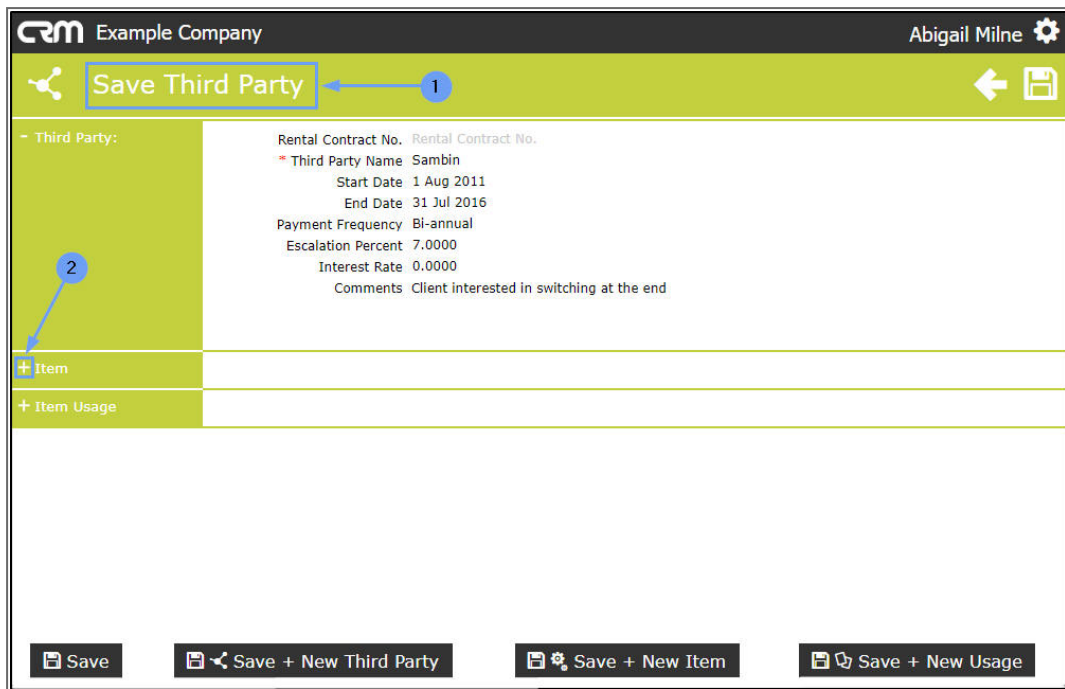
You can navigate to the (edit) **Item** details frame in 2 ways:

Either

1. In the **Third Party for [Salesman's Name] Customers** page
2. Hover over a Third Party summary to reveal the **Action Item** buttons:
3. Click on the **View / Edit this Third Party** button.

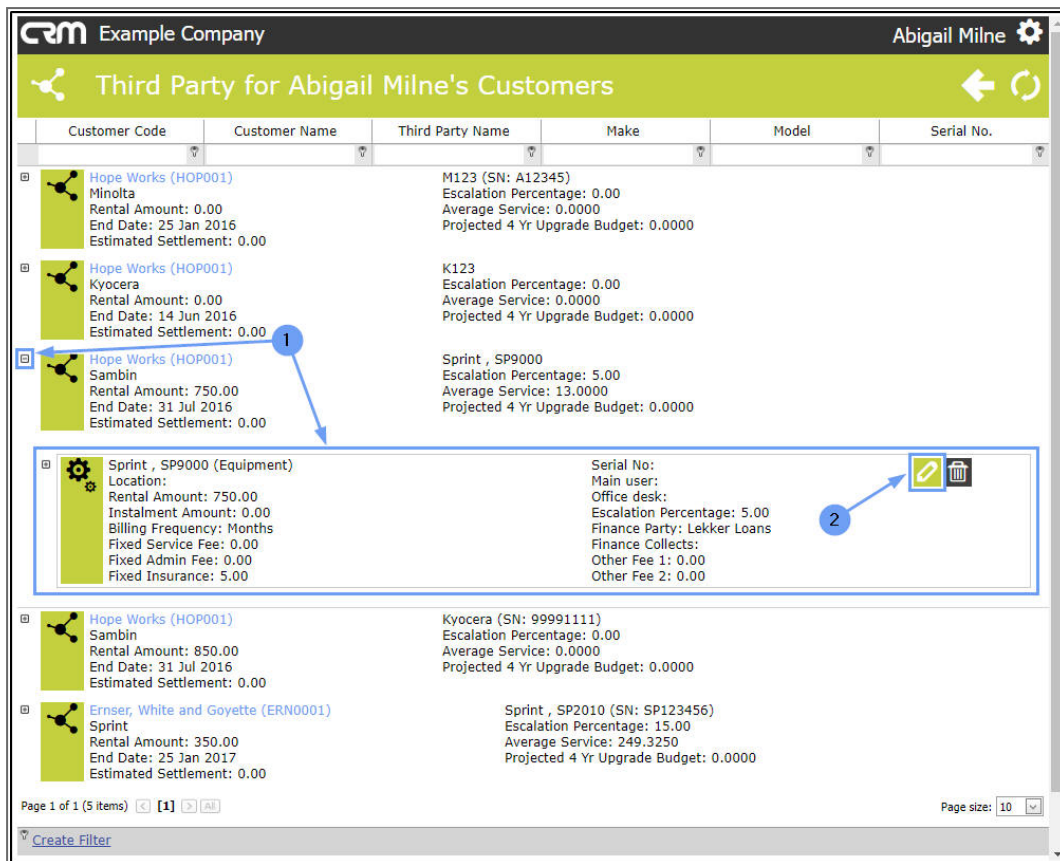


1. The **Save Third Party** page will open.
2. Click on the expand icon in front of **Item**.



Or

1. In the **Third Party for [Salesman's Name] Customers** page
2. Expand the selected Third Party summary to reveal the **Item** summary.
3. Hover over the Item summary to reveal the Action buttons and click on the **View / Edit this Third Party** button.



1. The **Save Third Party** page will open.
2. The **Item** frame will be auto-expanded ready for you to make changes.
3. **Add** or **Edit** the Item information as required:
  - **Item Type:** Select from the drop-down menu the type e.g. Toners, Spares, Accessories.
  - **Make:** Select from the drop-down menu the make e.g. Kyocera
  - **Model:** Type in the Model No. of the item.
  - **Serial Number:** Type in the Serial No. of the item.
  - **Location:** Type in the location of the item.
  - **Description:** Type in a brief description of the item.



- **Main User:** Type in the name of the user who mainly uses this item, if applicable.
- **Office Desk No:** Type in the office desk number of the user, if applicable.
- **Rental Amount:** Type in or use the directional arrows to select the rental amount.
- **Instalment Amount :** Type in or use the directional arrows to select the instalment amount that is being paid.
- **Escalation Percentage:** Type in or use the directional arrows to select the escalation percentage of this particular item.
- **Billing Frequency:** Select from the drop-down list the billing frequency e.g. months, quarterly.

- **Finance Party:** Type in the Finance Party name.
- **Finance Collects:** Select **Yes** if the Finance Party collects the fee and **No** if not.
- **Fixed Service Fee:** If there is a fixed Service Fee, either type in or use the directional arrows to select this fee amount.
- **Fixed Admin Fee :** If there is a fixed Admin Fee, either type in or use the directional arrows to select this fee amount.
- **Fixed Insurance:** If there is a fixed Service Fee, either type in or use the directional arrows to select this fee amount.
- **Other Fee 1 - 2 :** Use these fields to add any additional fees (not listed here) that may be linked to this third party, if applicable.

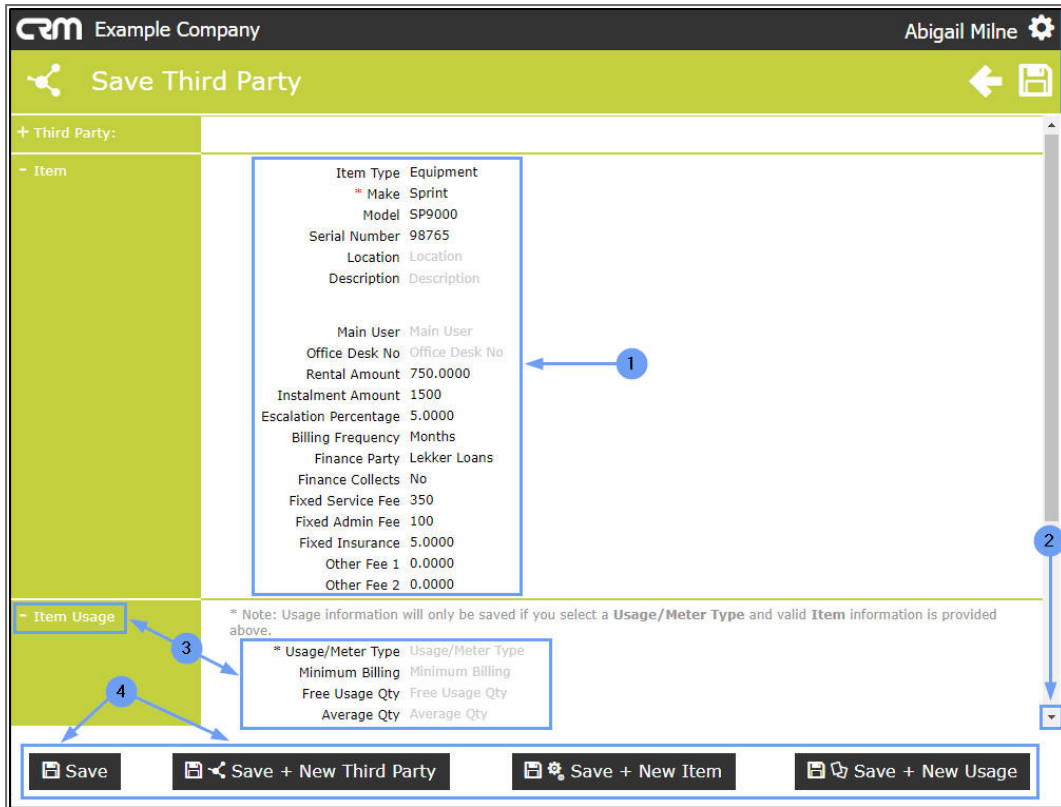
1. Once you have edited the Item details as required, you have several choices:

Either

2. Scroll down the page to view all the Item Usage details.
3. [Add or Edit the Item Usage](#) information as required.

Or

4. Select one of the [Save Options](#) as explained above.



## DELETE THIRD PARTY 'ITEM' INFORMATION

1. In the **Third Party for [Salesman's Name] Customers** page,
2. **Expand** the selected Third Party summary to display the **Item summary**.
3. **Hover over** this Item summary to reveal the **Actions buttons**.
4. Note that the **Page Reference field** states that there are currently **6** items.
5. Click on the **Delete** button.

CRM Example Company Abigail Milne

Third Party for Abigail Milne's Customers

Rental Amount: 0.00 End Date: 25 Jan 2016 Estimated Settlement: 0.00	Average Service: 0.0000 Projected 4 Yr Upgrade Budget: 0.0000
Hope Works (HOP001) Kyocera Rental Amount: 0.00 End Date: 14 Jun 2016 Estimated Settlement: 0.00	K123 Escalation Percentage: 0.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: 0.0000
Hope Works (HOP001) Sambin Rental Amount: 750.00 End Date: 31 Jul 2016 Estimated Settlement: 0.00	Sprint , SP9000 Escalation Percentage: 5.00 Average Service: 13.0000 Projected 4 Yr Upgrade Budget: 0.0000
Hope Works (HOP001) Sambin Rental Amount: 850.00 End Date: 31 Jul 2016 Estimated Settlement: 0.00	Kyocera (SN: 99991111) Escalation Percentage: 0.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: 0.0000
Hope Works (HOP001) Minolta Rental Amount: 550.00 End Date: 25 Jan 2016 Estimated Settlement: 0.00	Kyocera , Delux (SN: KD9876) Escalation Percentage: 5.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: 0.0000
Kyocera , Delux (Equipment) Location: Rental Amount: 550.00 Instalment Amount: 1500.00 Billing Frequency: Months Fixed Service Fee: 350.00 Fixed Admin Fee: 150.00 Fixed Insurance: 100.00	Serial No: KD9876 Main user: John Smith Office desk: 12 Escalation Percentage: 5.00 Finance Party: Finance Collects: Other Fee 1: 0.00 Other Fee 2: 0.00
Ernsner, White and Goyette (ERN0001) Sprint Rental Amount: 350.00 End Date: 25 Jan 2017 Estimated Settlement: 0.00	Sprint , SP2010 (SN: SP123456) Escalation Percentage: 15.00 Average Service: 249.3250 Projected 4 Yr Upgrade Budget: 0.0000

Page 1 of 1 (6 items) [1] Page size: 10

1. A message box will pop up asking;
  - **Are you sure you want to delete this item? You cannot undo these changes.**
2. Click on **OK**.

localhost:50000 says  
Are you sure you want to delete this item? You cannot undo these changes.

2

OK Cancel

1

Item Name	Details
Rental Amount: 0.00 End Date: 25 Jan 2016 Estimated Settlement: 0.00	
Hope Works (HOP001) Kycera Rental Amount: 0.00 End Date: 14 Jun 2016 Estimated Settlement: 0.00	K123 Escalation Percentage: 0.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: 0.0000
Hope Works (HOP001) Sambin Rental Amount: 750.00 End Date: 31 Jul 2016 Estimated Settlement: 0.00	Sprint , SP9000 Escalation Percentage: 5.00 Average Service: 13.0000 Projected 4 Yr Upgrade Budget: 0.0000
Hope Works (HOP001) Sambin Rental Amount: 850.00 End Date: 31 Jul 2016 Estimated Settlement: 0.00	Kyocera (SN: 99991111) Escalation Percentage: 0.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: 0.0000
Hope Works (HOP001) Minolta Rental Amount: 550.00 End Date: 25 Jan 2016 Estimated Settlement: 0.00	Kyocera , Delux (SN: KD9876) Escalation Percentage: 5.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: 0.0000
Kyocera , Delux (Equipment) Location: Rental Amount: 550.00 Instalment Amount: 1500.00 Billing Frequency: Months Fixed Service Fee: 350.00 Fixed Admin Fee: 150.00 Fixed Insurance: 100.00	Serial No: KD9876 Main user: John Smith Office desk: 12 Escalation Percentage: 5.00 Finance Party: Finance Collects: Other Fee 1: 0.00 Other Fee 2: 0.00
Ernser, White and Goyette (ERN0001) Sprint Rental Amount: 350.00 End Date: 25 Jan 2017 Estimated Settlement: 0.00	Sprint , SP2010 (SN: SP123456) Escalation Percentage: 15.00 Average Service: 249.3250 Projected 4 Yr Upgrade Budget: 0.0000

Page 1 of 1 (6 items) [1] [Alt]

Page size: 10

Create Filter

- The screen will refresh and the deleted item will be removed. The Page Reference field will adjust to reflect the reduced number of items.

Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
Hope Works (HOP001)	Minolta	M123 (SN: A12345)			
	Rental Amount: 0.00	Escalation Percentage: 0.00			
	End Date: 25 Jan 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Kyocera	K123			
	Rental Amount: 0.00	Escalation Percentage: 0.00			
	End Date: 14 Jun 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Sambin	Sprint , SP9000			
	Rental Amount: 750.00	Escalation Percentage: 5.00			
	End Date: 31 Jul 2016	Average Service: 13.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Sambin	Kyocera (SN: 99991111)			
	Rental Amount: 850.00	Escalation Percentage: 0.00			
	End Date: 31 Jul 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			
Hope Works (HOP001)	Minolta	Kyocera , Delux (SN: KD9876)			
	Rental Amount: 550.00	Escalation Percentage: 5.00			
	End Date: 25 Jan 2016	Average Service: 0.0000			
	Estimated Settlement: 0.00	Projected 4 Yr Upgrade Budget: 0.0000			

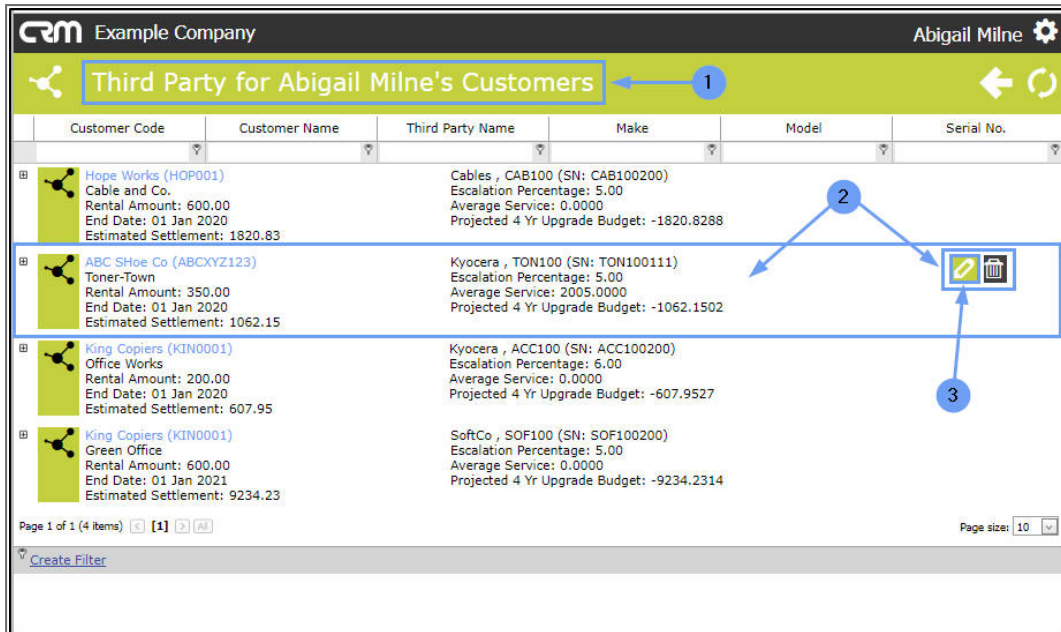
## VIEW / EDIT / ADD THIRD PARTY ' ITEM USAGE' INFORMATION

These details are **important** to include, if available as you will also take all these figures into account (as well as the **Item** figures) when creating your **proposal** or **quote**. The aim being to create a better deal for this customer to win their custom.

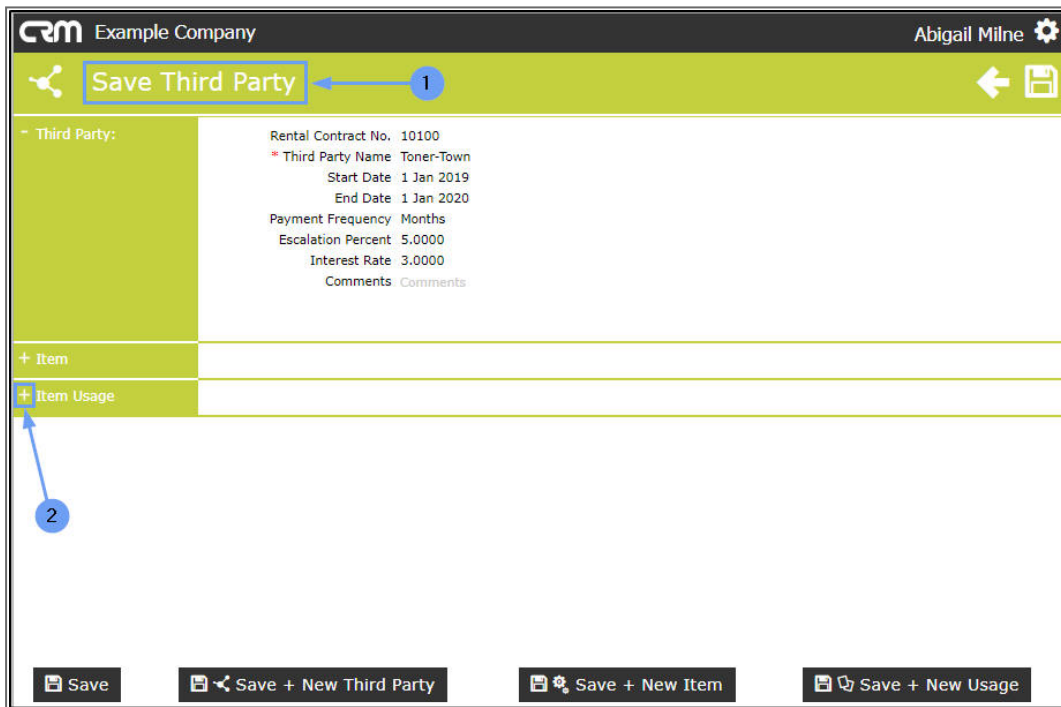
You can navigate to the **Item Usage** frame in 2 ways:

Either

1. In the **Third Party for [Salesman's Name] Customers** page
2. Hover over a Third Party summary to reveal the **Action Item** buttons:
3. Click on the **View/Edit this Third Party** button.



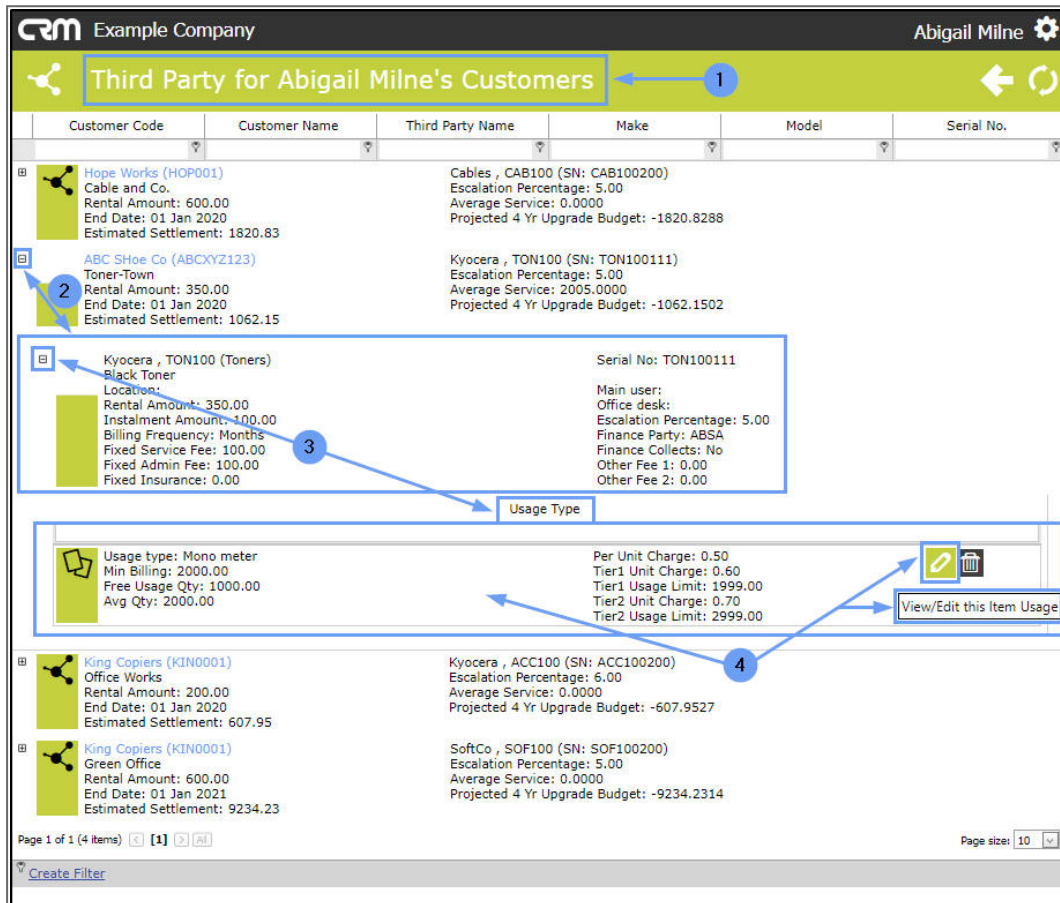
1. The **Save Third Party** page will open.
2. Click on the expand icon in front of **Item Usage**.



Or



1. In the **Third Party for [Salesman's Name] Customers** page
2. **Expand** the selected Third Party Main Information summary to reveal the **Item** summary.
3. **Expand** this Item summary to reveal the Item **Usage Type** summary.
4. **Hover over** the Item Usage Type summary to reveal the Action buttons and click on the **View / Edit this Item Usage** Action button.



1. The **Save Third party** page will open.
2. Both the **Item** frame and the
3. **Item Usage** frame will be expanded ready for you to Add / Edit / Delete Item and Item Usage information.
4. The reason that both frames are auto-expanded is explained in the **Note** found at the top of the Item Usage frame:

\* **Note:** Usage information will only be saved if you select a Usage/Meter Type and valid Item information is provided above.

- **Add or Edit** the Item Usage information as required:
  - **Usage / Meter Type:** Select from the drop-down menu the type e.g. Mono meter, Colour A3.
  - **Minimum Billing:** Either type in or use the arrow indicators to select the minimum billing amount (in Rand value), if applicable
  - **Free Usage Qty:** Either type in or use the arrow indicators to select the free usage quantity, if applicable.

- **Average Qty:** Either type in or use the arrow indicators to select the average usage quantity.
- **Per Unit Charge:** Either type in or use the arrow indicators to select the per unit charge.

CRM Example Company Abigail Milne

**Save Third Party**

**Item**

Item Type Toners  
 \* Make Kyocera  
 Model TON100  
 Serial Number TON100111  
 Location Location  
 Description Black Toner

Main User Main User  
 Office Desk No Office Desk No  
 Rental Amount 350.0000  
 Instalment Amount 100.0000  
 Escalation Percentage 5.0000  
 Billing Frequency Months  
 Finance Party ABSA  
 Finance Collects No  
 Fixed Service Fee 100.0000  
 Fixed Admin Fee 100.0000  
 Fixed Insurance 0.0000  
 Other Fee 1 0.0000  
 Other Fee 2 0.0000

**Item Usage**

\* Note: Usage information will only be saved if you select a Usage/Meter Type and valid Item information is provided above.

\* Usage/Meter Type  Mono meter  
 Minimum Billing 2000.0000  
 Free Usage Qty 1000.00  
 Average Qty 2000.00  
 Per Unit Charge 0.50  
 Tier 1 Unit Charge 0.6000  
 Tier 1 Usage Limit 1999.0000  
 Tier 2 Unit Charge 0.7000  
 Tier 2 Usage Limit 2999.0000  
 Escalation Percentage 5.0000  
 Billing Frequency Months  
 Average 6 Month Spend 0.0000  
 Month 1 Spend 2500.0000  
 Month 2 Spend 0.0000  
 Month 3 Spend 0.0000  
 Month 4 Spend 0.0000  
 Month 5 Spend 0.0000  
 Month 6 Spend 0.0000

Save Save + New Third Party Save + New Item Save + New Usage

- **Tier 1 Unit Charge:**
- **Tier 1 Usage Limit:**
- **Tier 2 Unit Charge:**
- **Tier 2 Usage Limit:**

CRM Example Company
Abigail Milne

Save Third Party

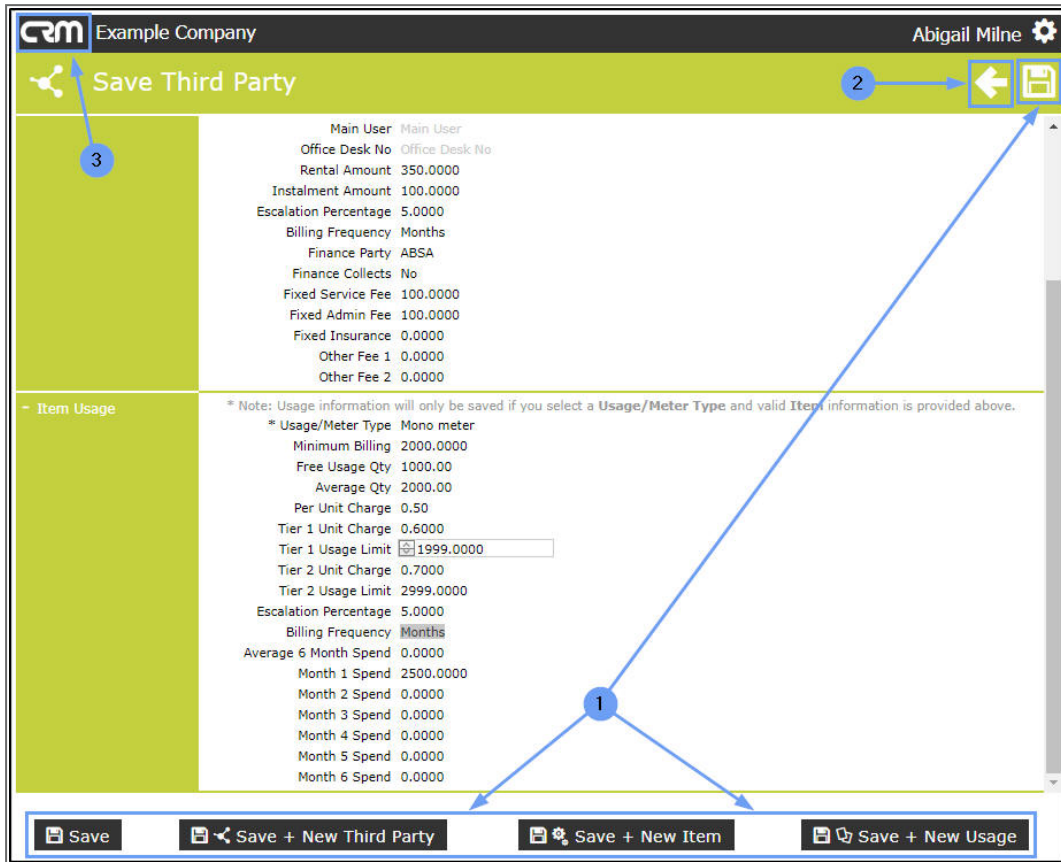
Item	Item Type Toners * Make Kyocera Model TON100 Serial Number TON100111 Location Location Description Black Toner
Item Usage	* Note: Usage information will only be saved if you select a Usage/Meter Type and valid Item information is provided above. * Usage/Meter Type <input checked="" type="checkbox"/> Mono meter Minimum Billing 2000.0000 Free Usage Qty 1000.00 Average Qty 2000.00 Per Unit Charge 0.50 <div style="border: 1px solid blue; padding: 2px; display: inline-block;">                     Tier 1 Unit Charge 0.6000                      Tier 1 Usage Limit 1999.0000                      Tier 2 Unit Charge 0.7000                      Tier 2 Usage Limit 2999.0000                 </div> Escalation Percentage 5.0000 Billing Frequency Months Average 6 Month Spend 0.0000 Month 1 Spend 2500.0000 Month 2 Spend 0.0000 Month 3 Spend 0.0000 Month 4 Spend 0.0000 Month 5 Spend 0.0000 Month 6 Spend 0.0000

Save
 Save + New Third Party
 Save + New Item
 Save + New Usage

- Escalation Percentage:
- Billing Frequency:
- Average 6 Month Spend:
- Month 1 Spend to Month 6 Spend:

- When you have finished adding or editing the **Item Usage** information,
  - Either,
    - Select one of the Save Options or
    - or,
    - Click on **Back** to return to the **previous page** (any changes made will not be saved)
    - or,
    - Click on the **CRM logo** to return to the **Dashboard** (Home page), (any changes made will not be saved).

**Note:** If you are adding equipment that has multiple meters - then select '**Save + New Usage**' to add another meter.



## DELETE THIRD PARTY 'ITEM USAGE' INFORMATION

1. In the **Third Party for [Salesman's Name] Customers** page
2. **Expand** the selected Third Party **Main Information** summary to reveal the **Item** summary.
3. **Expand** this Item summary to reveal the Item **Usage Type** summary.
4. **Hover over** the Item Usage Type summary to reveal the **Action buttons**.
5. Click on the **Delete this Item Usage** Action button.

**CRM Example Company** | Abigail Milne

### Third Party for Abigail Milne's Customers

Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
Hope Works (HOP001)	Cable and Co.	Cables , CAB100 (SN: CAB100200)			
ABC SHoe Co (ABCXYZ123)	Toner-Town	Kyocera , TON100 (SN: TON100111)			
King Copiers (KIN0001)	Office Works	Kyocera , ACC100 (SN: ACC100200)			
King Copiers (KIN0001)	Green Office	SoftCo , SOF100 (SN: SOF100200)			

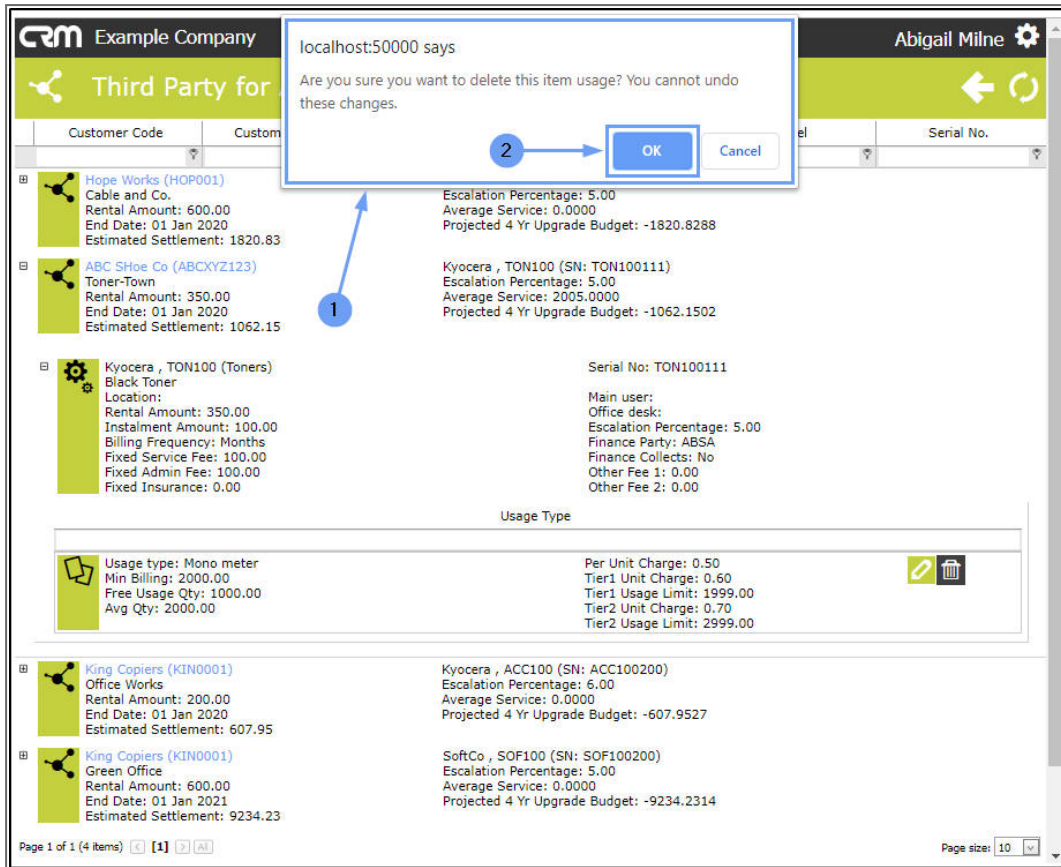
**Usage Type**

Usage type: Mono meter  
 Min Billing: 2000.00  
 Free Usage Qty: 1000.00  
 Avg Qty: 2000.00

Per Unit Charge: 0.50  
 Tier1 Unit Charge: 0.60  
 Tier1 Usage Limit: 1999.00  
 Tier2 Unit Charge: 0.70  
 Tier2 Usage Limit: 2999.00

Page 1 of 1 (4 Items) | Page size: 10

1. A message box will pop up asking;
  - Are you sure you want to delete this item usage? You cannot undo these changes.
2. Click on **OK**.



1. The screen will **refresh** and the deleted item usage type information will be **removed**.
2. The Usage Type frame will contain a **No data to display** message.
3. Click on **Back** to return to the previous page or,
4. Click on the **CRM logo** to return to the CRM Homepage.



**CRM** Example Company
Abigail Milne

Third Party for Abigail Milne's Customers
3

Customer Code	Customer Name	Third Party Name	Make	Model	Serial No.
4	<b>Hope Works (HOP001)</b> Cable and Co. Rental Amount: 600.00 End Date: 01 Jan 2020 Estimated Settlement: 1820.83	Cables , CAB100 (SN: CAB100200) Escalation Percentage: 5.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: -1820.8288			
	<b>ABC SHoe Co (ABCXY123)</b> Toner-Town Rental Amount: 350.00 End Date: 01 Jan 2020 Estimated Settlement: 1062.15	Kyocera , TON100 (SN: TON100111) Escalation Percentage: 5.00 Average Service: 2005.0000 Projected 4 Yr Upgrade Budget: -1062.1502			
	<b>Kyocera , TON100 (Toners)</b> Black Toner Location: Rental Amount: 350.00 Instalment Amount: 100.00 Billing Frequency: Months Fixed Service Fee: 100.00 Fixed Admin Fee: 100.00 Fixed Insurance: 0.00	Serial No: TON100111  Main user: Office desk: Escalation Percentage: 5.00 Finance Party: ABSA Finance Collects: No Other Fee 1: 0.00 Other Fee 2: 0.00			
<div style="display: flex; justify-content: space-between; align-items: center;"> <span>1 </span> <span>Usage Type</span> </div> <div style="border: 1px solid gray; padding: 5px; text-align: center; margin-top: 5px;">                     No data to display <span style="float: right;">2 </span> </div>					
	<b>King Copiers (KIN0001)</b> Office Works Rental Amount: 200.00 End Date: 01 Jan 2020 Estimated Settlement: 607.95	Kyocera , ACC100 (SN: ACC100200) Escalation Percentage: 5.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: -607.9527			
	<b>King Copiers (KIN0001)</b> Green Office Rental Amount: 600.00 End Date: 01 Jan 2021 Estimated Settlement: 9234.23	SoftCo , SOF100 (SN: SOF100200) Escalation Percentage: 5.00 Average Service: 0.0000 Projected 4 Yr Upgrade Budget: -9234.2314			

Page 1 of 1 (4 items) **1** 
Page size: 10

[Create Filter](#)

CRM.000.025

