

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

CRM CUSTOMERS

CUSTOMERS DASHBOARD

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**.

The **Customer Dashboard** is where you can view and access all of the selected customer details and information.

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

ACCESS THE CUSTOMER DASHBOARD

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

CRM Example Company Abigail Milne

Dashboard 1 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

create cold call	30 Sep 2016 0	recommendations 6	warnings 6
customers 74	cases 6	activities 6	
quotes 6	equipment 147	3rd party 0	

Today Recent Calendar

Schedule Date Status

No data to display

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1. The **Customers** listing page will be open.
2. You can use the **Page Reference field**,
3. the **Filter Row** or
4. the **Filter Text Box** to search for your customer.
5. Click on the selected customer icon in the **View** column.

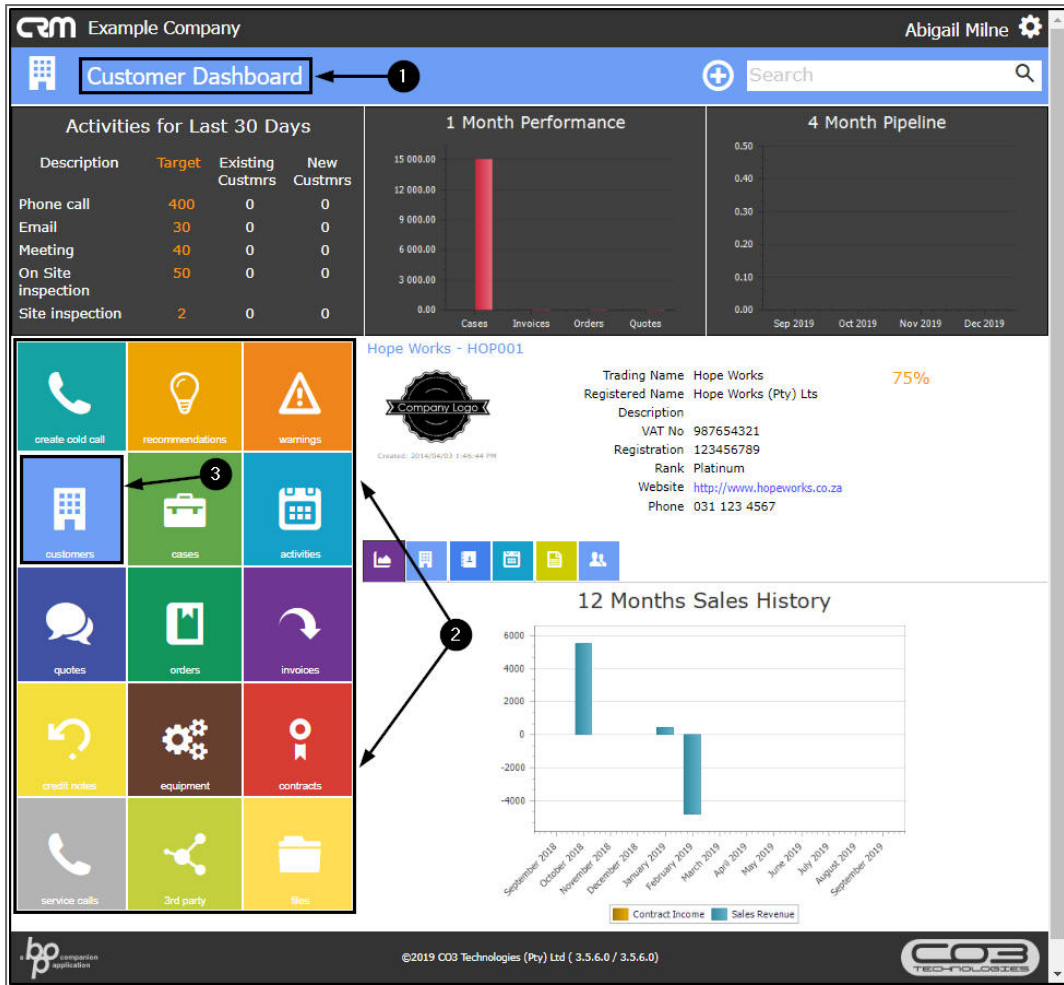
The screenshot shows the CRM interface for 'Example Company' with user 'Abigail Milne'. The main navigation bar includes a 'Customers' tile (1) and a search filter (4). The table below lists customer details:

View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
	Hope Works	HOP001	Duncan McCreddie	098 765 432	d.mccreddie@noem	91%	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%	Active	Silver	No	Yes
	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	Active	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

At the bottom, the pagination shows 'Page 4 of 8 (74 items)' with a selected page '4' (2) and a page size of '10'.

VIEW CUSTOMER DASHBOARD TILES / PAGE LINKS

1. The **Customer Dashboard** (Customer Home page) will open.
2. Most of the page tiles will link you to information specific to the customer you have selected to view,
3. With the exception of the **Customers** tile which will take you back to the **Customers listing** page.



1. In this **Customer Dashboard**,
2. You will find the same tiles that you have available in the **Dashboard** (Home page):

- **Create Cold Call**
- **Recommendations**
- **Warnings**
- **Customers**
- **Cases**
- **Activities**
- **Quotes**



- [Equipment](#)
- [Third Party](#)

CRM Example Company

Dashboard

Activities for Last 30 Days

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 Per

Category	Value
Cases	15 000.00
Invoices	0.00

30 Sep 2016 0

create cold call

0

recommendations

6

warnings

Today Recent Calendar

74

customers

6

cases

6

activities

← 2 →

6

quotes

147

equipment

0

3rd party

business partner application

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CRM Example Company

🏢
Hope Works
1

Activities for Last 30 Days

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 Per

Category	Value
Cases	15 000.00
Invoices	0.00

📞
create cold call

💡
recommendations

⚠️
warnings

🏢
customers

📁
cases

📅
activities

💬
quotes

📄
orders

🔄
invoices

↶
credit notes

⚙️
equipment

🏆
contracts

📞
service calls

🌐
3rd party

📁
files

Hope Works - HOP001

Created: 2014/04/03 1:46:44 PM

📈
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📄
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2

6000
4000
2000
0
-2000
-4000
September 2014

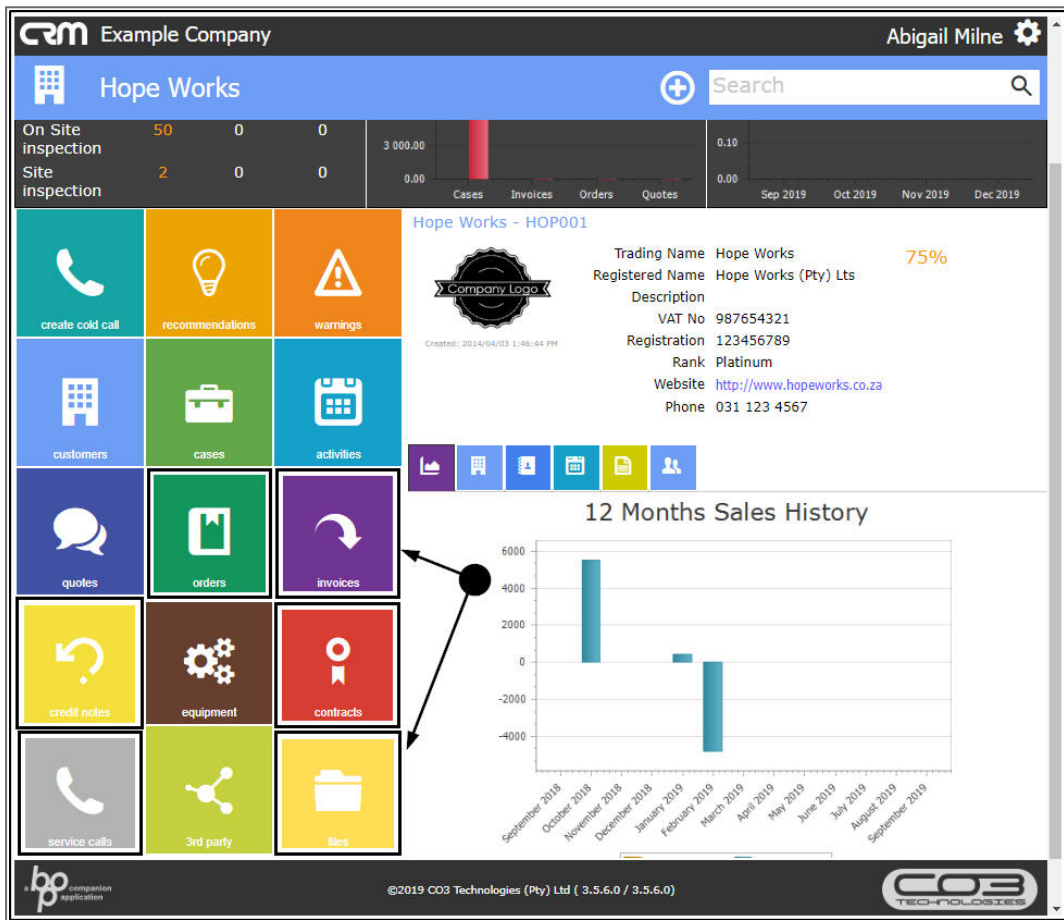
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business
application

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- You will also find the following additional Information tiles in this page:

- **Orders**
- **Invoices**
- **Credit Notes**
- **Contracts**
- **Service Calls**
- **Files**



VIEW CUSTOMER ACTION BUTTONS

- In the **Customer Dashboard** you can view and access the following information via the customer **Actions buttons**:

Note: Hover anywhere over the customer information frame to display these buttons.

- [View/Edit Customer](#)
- [Add Contact](#)
- [Add Third Party](#)
- [Add Note](#)
- [Release Customer](#)
- [Maintain Customer Salesmen](#)
- [Create Cold Call](#)
- [Add New Activity](#)
- [Add New Non-Case Related Quote](#)

2. Click on an individual button to direct you to the relevant **Action** page.



VIEW ADDITIONAL CUSTOMER DETAILS TILES

- You can also view and access more customer information via the customer **Details** tiles :
 - Sales
 - Addresses
 - Contacts
 - Open Activities
 - Notes
 - Salesmen



SETTINGS - 'HIDE DASHBOARD PANEL ON CUSTOMER PAGE' CHECKBOX

If you wish to have more space on this page to view your customer information more clearly, you can change your page **Settings**.

- Click on the **Settings** icon.

The screenshot shows a CRM interface for 'Example Company' with a user profile for 'Hope Works'. The dashboard includes several key sections:

- Header:** 'crm Example Company', 'Hope Works', and a search bar.
- Activities for Last 30 Days:** A table showing activity counts for various types.
- 1 Month Performance:** A bar chart showing performance across Cases, Invoices, Orders, and Quotes.
- 4 Month Pipeline:** A line chart showing the pipeline over the last four months.
- Company Profile:** Details for 'Hope Works - HOP001', including trading name, VAT number, and contact information.
- Navigation Grid:** A 4x3 grid of icons for functions like 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'.
- 12 Months Sales History:** A bar chart showing 'Contract Income' and 'Sales Revenue' from September 2018 to September 2019.

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

Trading Name	Hope Works	75%
Registered Name	Hope Works (Pty) Lts	
Description		
VAT No	987654321	
Registration	123456789	
Rank	Platinum	
Website	http://www.hopeworks.co.za	
Phone	031 123 4567	

Month	Contract Income	Sales Revenue
September 2018	0	0
October 2018	0	0
November 2018	0	0
December 2018	0	0
January 2019	0	0
February 2019	0	0
March 2019	0	0
April 2019	0	0
May 2019	0	0
June 2019	0	0
July 2019	0	0
August 2019	0	0
September 2019	0	0

1. The **Setting** panel will be expanded.
2. Select the **'Hide dashboard panel on customer page'** checkbox.

The screenshot shows the CRM interface for 'Example Company' with user 'Abigail Milne'. The main dashboard for 'Hope Works' includes:

- Activities for Last 30 Days:**

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	0
Email	30	0	0
Meeting	40	0	0
On Site	50	0	0
Inspection	2	0	0
- Options Panel:**
 - Show items for subordinates
 - Exclude deleted customers in search on Cold Call screen
 - Hide dashboard panel
 - Hide dashboard panel on customer page
- Company Profile:**
 - Trading Name: Hope Works (75%)
 - Registered Name: Hope Works (Pty) Lts
 - Description: [blank]
 - VAT No: 987654321
 - Registration: 123456789
 - Rank: Platinum
 - Website: <http://www.hopeworks.co.za>
 - Phone: 031 123 4567
- 12 Months Sales History:**

Month	Contract Income	Sales Revenue
September 2018	0	0
October 2018	0	0
November 2018	0	0
December 2018	0	0
January 2019	0	0
February 2019	0	0
March 2019	0	0
April 2019	0	0
May 2019	0	0
June 2019	0	0
July 2019	0	0
August 2019	0	0
September 2019	0	0

1. As you select the check box,
2. The **Dashboard panel** will disappear from the screen.

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The dashboard is titled 'Hope Works' and contains a grid of 18 functional tiles: create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files. A settings panel is open, showing options like 'Show items for subordinates' and 'Hide dashboard panel'. A '12 Months Sales History' bar chart displays 'Contract Income' (yellow) and 'Sales Revenue' (blue) from September 2018 to September 2019. Annotations '1' and '2' point to the settings icon and the warnings tile.

Month	Contract Income	Sales Revenue
September 2018	0	0
October 2018	0	5000
November 2018	0	0
December 2018	0	0
January 2019	0	0
February 2019	0	0
March 2019	0	0
April 2019	0	0
May 2019	0	0
June 2019	0	0
July 2019	0	0
August 2019	0	0
September 2019	0	0

- Click outside of the Settings frame to view the full page without the Dashboard.

CRM Example Company
Abigail Milne

Hope Works

+ Search 🔍

📞
create cold call

💡
recommendations

⚠️
warnings

🏢
customers

👜
cases

📅
activities

💬
quotes

📄
orders

🔄
invoices

📝
credit notes

⚙️
equipment

🏆
contracts

📞
service calls

👤
3rd party

📁
files

Hope Works - HOP001

Trading Name Hope Works 75%

Registered Name Hope Works (Pty) Lts

Description

VAT No 987654321

Registration 123456789

Rank Platinum

Website <http://www.hopeworks.co.za>

Phone 031 123 4567

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👤
📅
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👤

12 Months Sales History

Month	Contract Income	Sales Revenue
September 2018	0	0
October 2018	0	0
November 2018	0	0
December 2018	0	0
January 2019	0	0
February 2019	0	0
March 2019	0	0
April 2019	0	0
May 2019	0	0
June 2019	0	0
July 2019	0	0
August 2019	0	0
September 2019	0	0

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CRM.002.001

