

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

CRM CUSTOMERS

SALES ORDERS

You can view, download, print and/or email Sales Orders for your Customers in CRM.

However, Sales Orders are **created** in BPO only.

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

NAVIGATE TO CUSTOMER DASHBOARD (CUSTOMER HOME PAGE)

To access your customer-specific list of Sales Orders, you will first need to navigate to the Customer Dashboard (Customer Home page).

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



1. The **Customers** listing page will open.

SEARCH FOR AND SELECT THE CUSTOMER

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 a CRM interface for 'Example Company' with user 'Abigail Milne'. The main navigation bar has a 'Customers' tab (1) and a search bar (4) with the placeholder 'Type Customer name search filter here...'. Below is a table of customer records. The first row is 'Hope Works' (5), which is selected. The table columns are: View, Customer, Code, Contact, Contact phone, Contact email, Complet, Status, Rank, Active, and Call Contact. The bottom of the screen shows a pagination control (2) for 'Page 4 of 8 (74 items)' and a 'Page size: 10' dropdown.

View	Customer	Code	Contact	Contact phone	Contact email	Complet	Status	Rank	Active	Call Contact
<input checked="" type="checkbox"/>	Hope Works	HOP001	Duncan McCreddie	098 765 432	d.mccreddie@noem	91%	Active	Platinum	Yes	Yes
<input type="checkbox"/>	IT Supplies	ITS0001				8%	Active		No	No
<input type="checkbox"/>	Joes Carpentry Shop	JOE0001	Mary Watson	031 123 456		50%	New - CRM	Gold	No	Yes
<input type="checkbox"/>	Judes Jewels	JUD0001				8%	New - CRM	Silver	No	No
<input type="checkbox"/>	Just In Time	JUS001				16%	Active		Yes	No
<input type="checkbox"/>	King Copiers	KIN0001	Jason King	0210134506		58%	Released	Bronze	No	Yes
<input type="checkbox"/>	King Enterprises	KIN0002	Lucy Rowe			50%	Active	Silver	No	Yes
<input type="checkbox"/>	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	Active	Silver	No	Yes
<input type="checkbox"/>	Little Bee Honey	LIT0001	John Ginseng	031 123 456		66%	Active	Silver	No	Yes
<input type="checkbox"/>	Lovely Test Customer	LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes

1. The **Customer Dashboard** (Customer Home page) will open.
2. Click on the **Orders** tile.

The screenshot shows a CRM dashboard for 'Example Company' with user 'Abigail Milne'. The main navigation bar includes 'Hope Works' (highlighted with a '1') and a search bar. The dashboard is divided into several sections:

- Activities for Last 30 Days:** A table showing activity counts for different types.

Description	Target	Existing Custmrs	New Custmrs
Email	30	2	0
Meeting	20	0	2
On Site inspection	20	1	0
Phone call	20	2	0
- 1 Month Performance:** A bar chart showing performance metrics for Cases, Invoices, Orders, and Quotes over the last month.
- 4 Month Pipeline:** A bar chart showing the pipeline over a 4-month period from Nov 2019 to Feb 2020.
- Customer Profile (Hope Works - HOP001):**
 - Trading Name: Hope Works (91%)
 - Registered Name: Hope Works (Pty) Lts
 - Description: VAT No 987654321, Registration 123456789, Rank Platinum, Website www.hopeworks.co.za, Phone 031 123 4567
- Navigation Grid:** A grid of icons for various functions. The 'orders' icon is highlighted with a '2'.
- 12 Months Sales History:** A line chart showing sales revenue and contract income from January 2018 to January 2019. The chart shows a significant drop in sales revenue in January 2019.

THE ORDERS FOR [SELECTED CUSTOMER] LISTING PAGE

1. The **Orders for [selected customer]** listing page will open.
2. All of the Orders linked to this customer will be displayed (even ones where you are not the Salesman).
3. The **Order Status** and **Order Status Description** can be viewed (e.g. I = Invoiced Order, N = New Order).

- Each **Order Value** can be viewed.
- The **Currency** of each Order can be viewed.

Order No	Order Status	Order Status Desc	Order Value	Currency
OR0000238	I	Invoiced order	14073.30	ZAR
OR0000239	N	New order	517.50	ZAR
OR0000240	I	Invoiced order	6210.00	ZAR
OR0000242	I	Invoiced order	6210.00	ZAR
OR0000243	I	Invoiced order	6210.00	ZAR
OR0000244	I	Invoiced order	3220.00	ZAR
OR0000246	N	New order	2686.98	ZAR
OR0000247	I	Invoiced order	1005.10	ZAR
OR0000248	I	Invoiced order	805.00	ZAR
OR0000249	I	Invoiced order	6210.00	ZAR

Page 14 of 14 (140 items) [1] [2] [3] [8] [9] [10] [11] [12] [13] [14] [All]

Create Filter

SEARCH FOR AND SELECT AN ORDER

- You can use the **Page Reference field** or the
- Filter Row** or the
- Create Filter Row** functionality to search for a particular Order.

VIEW, DOWNLOAD OR PRINT CUSTOMER ORDER

- In the **Order No.** column, click on the blue number of the Order that you wish to **View**, **Print** or **Download**.

CRM Example Company Abigail Milne

Orders for Hope Works

Order No	Order Status	Order Status Desc	Order Value	Currency
OR0000238	I	Invoiced order	14073.30	ZAR
OR0000239	N	New order	517.50	ZAR
OR0000240	I	Invoiced order	6210.00	ZAR
OR0000242	I	Invoiced order	6210.00	ZAR
OR0000243	I	Invoiced order	6210.00	ZAR
OR0000244	I	Invoiced order	3220.00	ZAR
OR0000246	N	New order	2686.98	ZAR
OR0000247	I	Invoiced order	1005.10	ZAR
OR0000248	I	Invoiced order	805.00	ZAR
OR0000249	I	Invoiced order	6210.00	ZAR

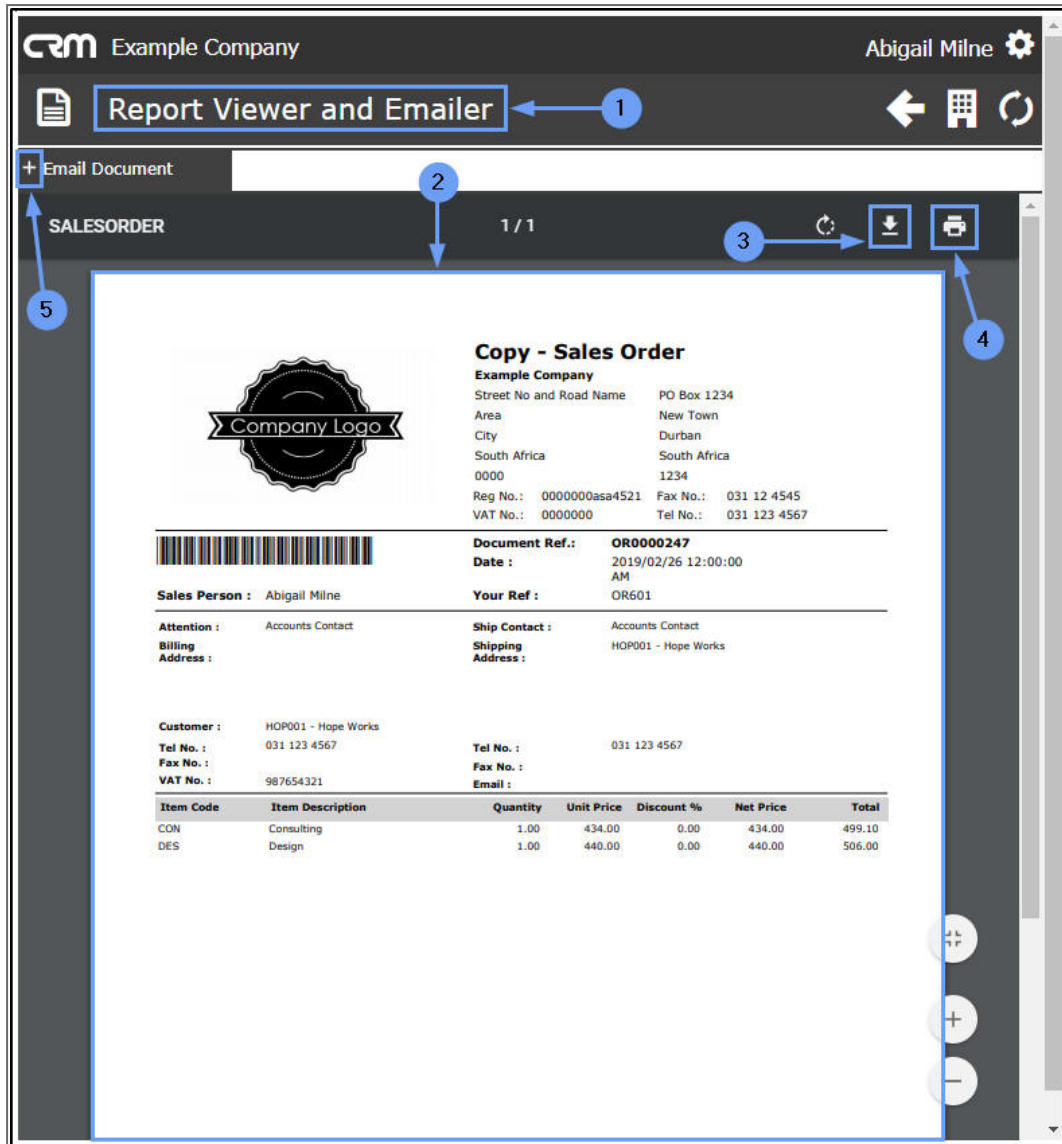
Page 14 of 14 (140 items) [1] [2] [3] ... [8] [9] [10] [11] [12] [13] [14] [All] Page size: 10

Create Filter

1. The **Report Viewer and Emailer** page will open.
2. The selected Order will be displayed.
3. Here you can **Download** the Order and/or
4. **Print** the Order.

EMAIL ORDER

5. Click on the expand icon [+] on the **Email Document** tab.



1. The **Email Document** frame will be expanded.

Check and/or add the following details, as necessary:

2. **To:** Either click in the field and select the preferred contact from the list, or type in the contact email address.
3. **Cc:** Here, you can add other email recipients, if applicable.
 - Either click in the field and select customer contacts from the list, or type in additional addresses as noted above

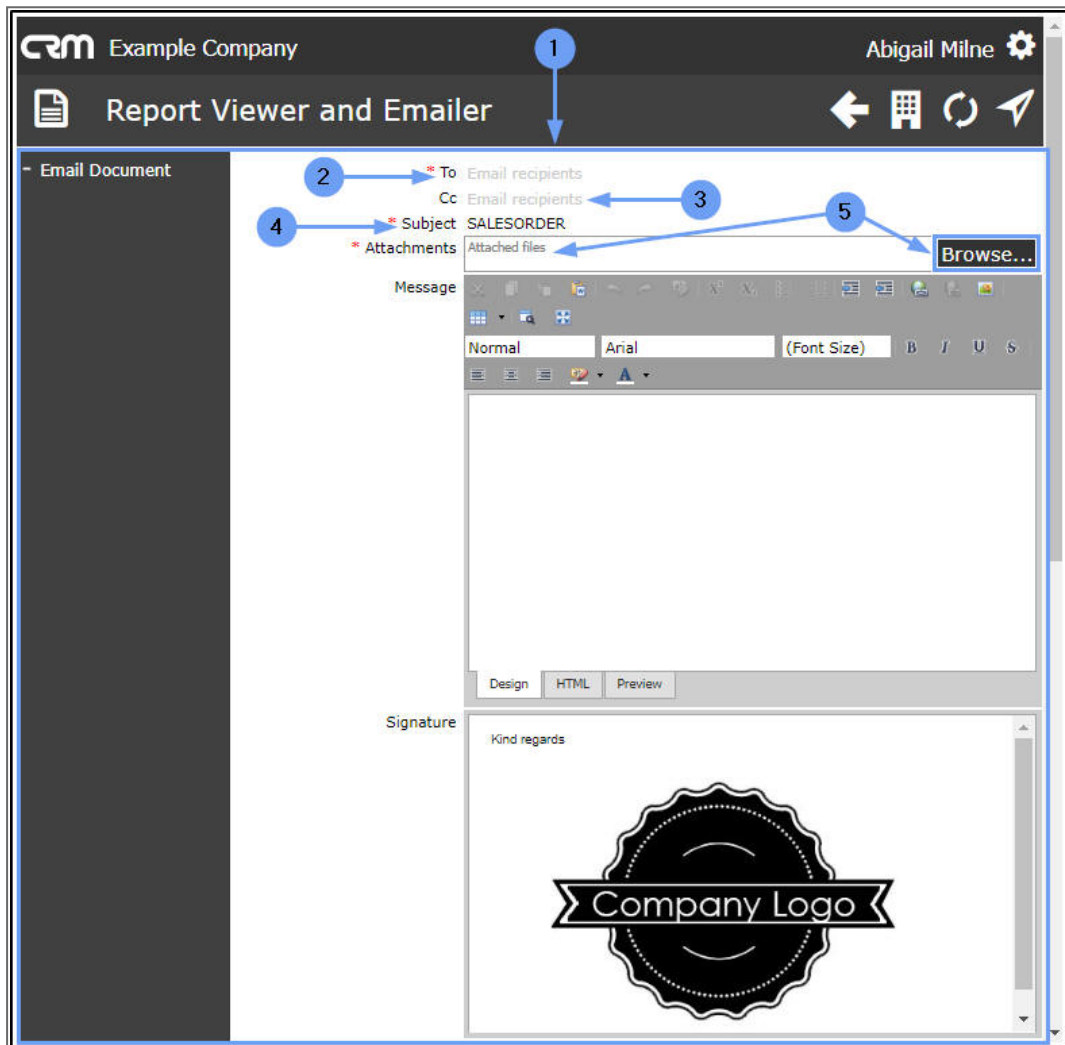
(separated by a semi-colon and a space).

4. **Subject:** This field will auto populate with **Sales Order** but you can edit this, if required.

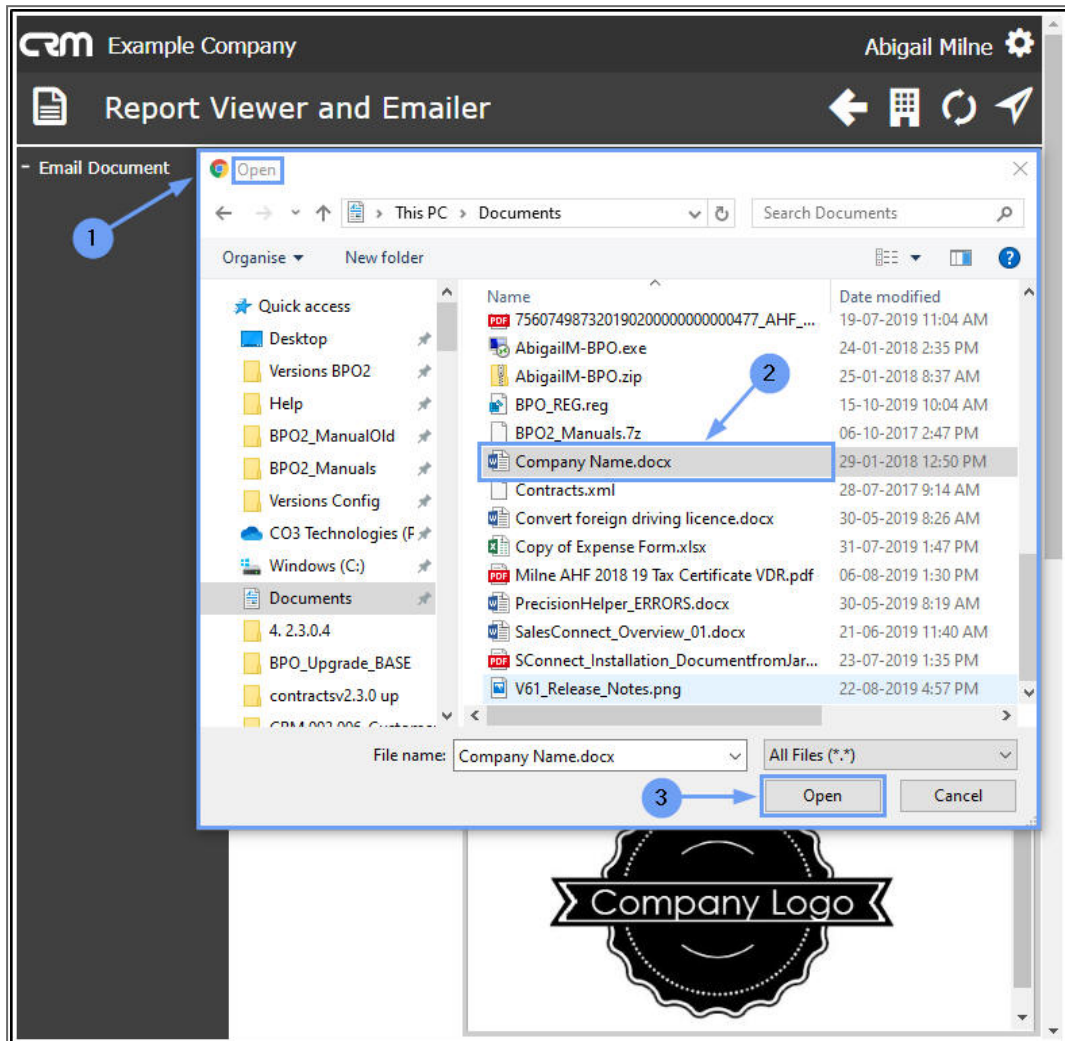
ADD AN ATTACHMENT

You can add other documents, as attachments, if required.

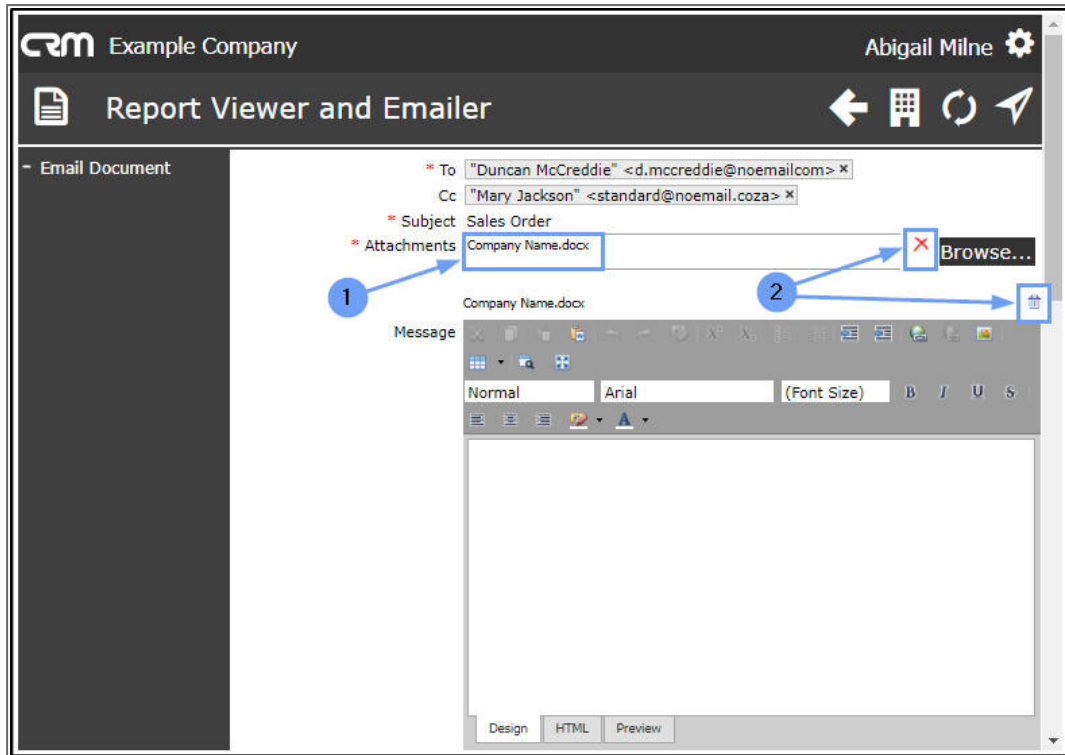
5. **Attachments:** Click on **Browse**.



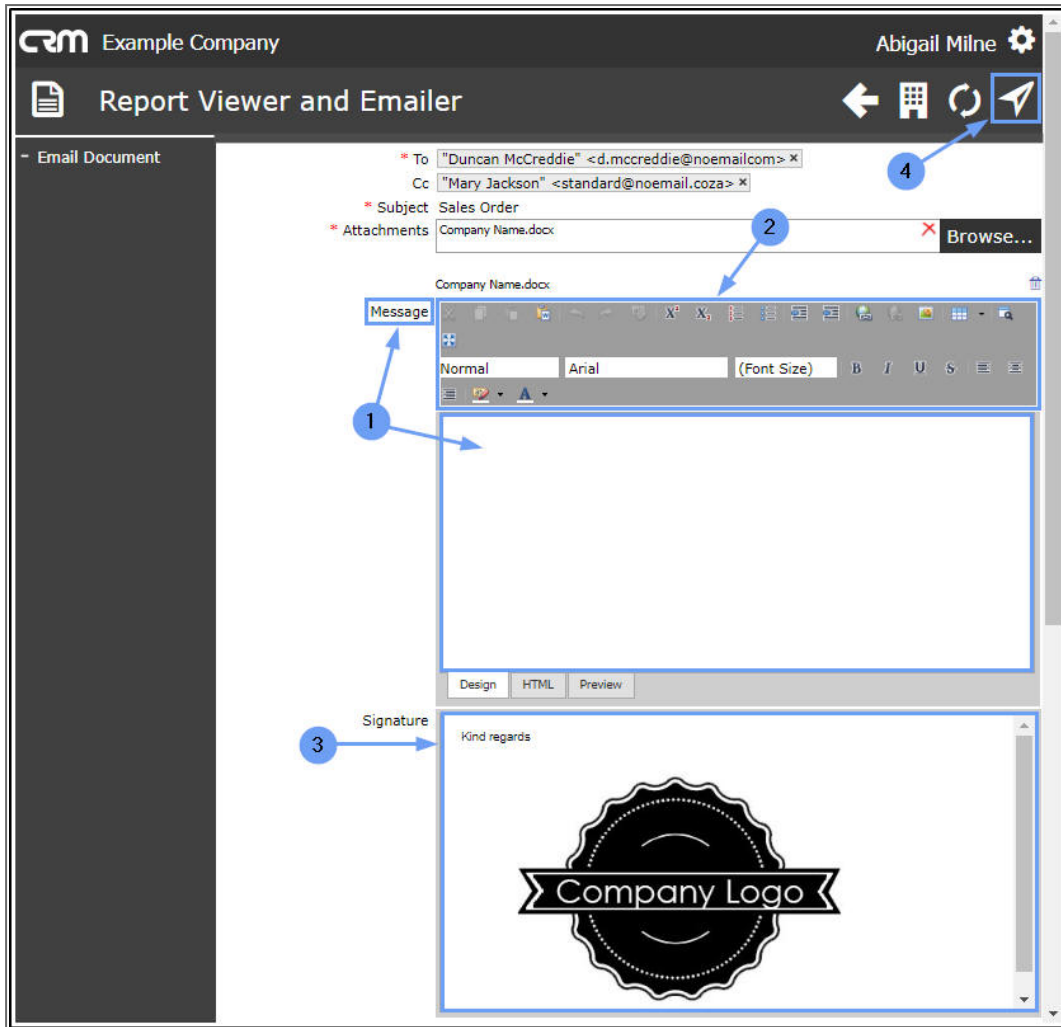
1. The **Open** screen will pop up.
2. Search for and select the file you wish to link to this Order.
3. Click on **Open** .



1. The file will now be attached to the email.
2. You can delete the attachment if required by clicking on either of the **Delete** icons.



1. Type a relevant message in the **Message** body.
2. The **Message tool bar** can be used to customise your email message.
3. **Signature:** If you have a **Signature configured in CRM** - your Signature will pull through here, otherwise the **Company default CRM mail signature** will pull through.
4. Click on the **Send** icon.




1. A **message box** will pop up informing you of the status of the sent email.
2. Click on **Back**.

Email saved to queue.

Report Viewer and Emailer

+ Email Document

SALESORDER 1 / 1



Company Logo

Copy - Sales Order

Example Company

Street No and Road Name: PO Box 1234
 Area: New Town
 City: Durban
 South Africa: South Africa
 0000: 1234
 Reg No.: 0000000asa4521 Fax No.: 031 12 4545
 VAT No.: 0000000 Tel No.: 031 123 4567

Sales Person : Abigail Milne

Attention : Accounts Contact
Billing Address :

Customer : HOP001 - Hope Works
Tel No. : 031 123 4567
Fax No. :
VAT No. : 987654321

Document Ref.: OR0000247
Date : 2019/02/26 12:00:00 AM
Your Ref : OR601

Ship Contact : Accounts Contact
Shipping Address : HOP001 - Hope Works

Tel No. : 031 123 4567
Fax No. :
Email :

Item Code	Item Description	Quantity	Unit Price	Discount %	Net Price	Total
CON	Consulting	1.00	434.00	0.00	434.00	499.10
DES	Design	1.00	440.00	0.00	440.00	506.00

1. You will return to the **Orders for [selected customer]** listing page.
2. Select another Order to View, Download, Print or Email, if required.
3. Click on the **Customers** icon to return to the **Customer Dashboard** (Customer Home page).
4. Click on the **CRM** icon to return to the **Dashboard** (Home page).

CRM Example Company Abigail Milne

Orders for Hope Works

Order No	Order Status	Order Status Desc	Order Value	
OR0000238	I	Invoiced order	14073.30	ZAR
OR0000239	N	New order	517.50	ZAR
OR0000240	I	Invoiced order	6210.00	ZAR
OR0000242	I	Invoiced order	6210.00	ZAR
OR0000243	I	Invoiced order	6210.00	ZAR
OR0000244	I	Invoiced order	3220.00	ZAR
OR0000246	N	New order	2686.98	ZAR
OR0000247	I	Invoiced order	1005.10	ZAR
OR0000248	I	Invoiced order	805.00	ZAR
OR0000249	I	Invoiced order	6210.00	ZAR

Page 14 of 14 (140 items) [1] [2] [3] ... [8] [9] [10] [11] [12] [13] [14] [A1] Page size: 10

Create Filter

CRM.002.007

