

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

CRM CUSTOMERS

CONTRACTS

In CRM you can view Contract Performance Reports for customer machines that are on contract.

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

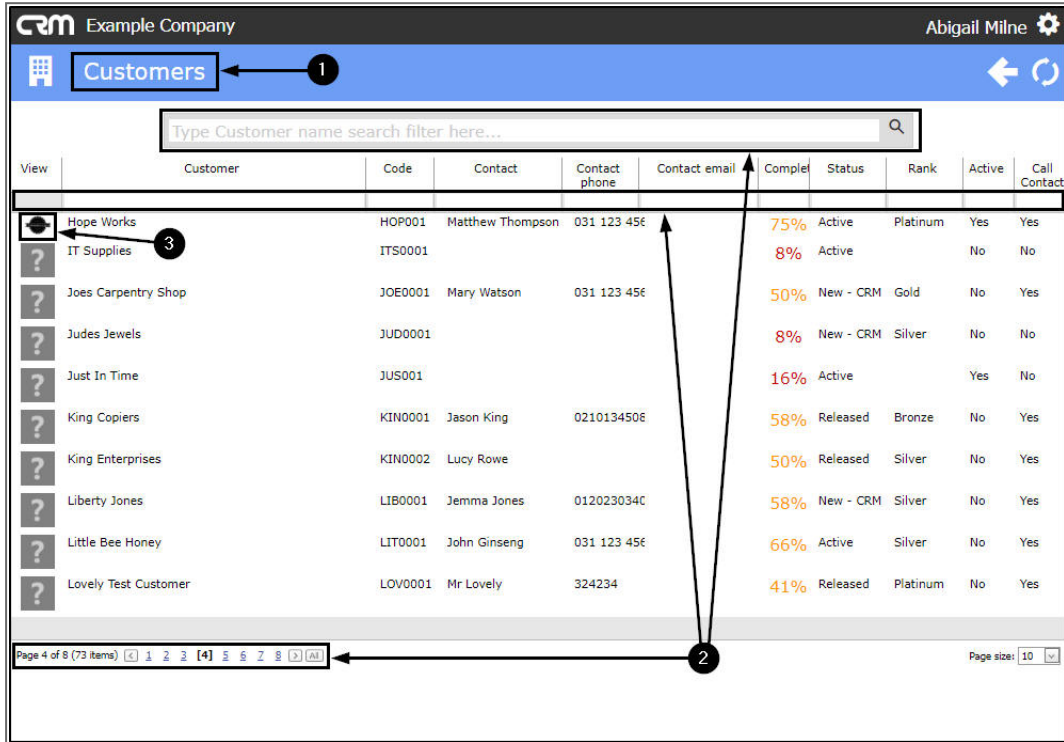
SELECT CUSTOMER

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

The screenshot shows the CRM Dashboard for 'Example Company' with user 'Abigail Milne'. A blue box labeled '1' highlights the 'Dashboard' tab in the top navigation bar. Below the dashboard, there are three main sections: 'Activities for Last 30 Days', '1 Month Performance', and '4 Month Pipeline'. The 'Activities for Last 30 Days' section contains a table with columns for Description, Target, Existing Custmrs, and New Custmrs. The '1 Month Performance' section shows a bar chart for Cases, Invoices, Orders, and Quotes. The '4 Month Pipeline' section shows a bar chart for Aug 2019, Sep 2019, Oct 2019, and Nov 2019. Below these sections is a grid of tiles for various functions: create cold call, recommendations, warnings, customers (74), cases (6), activities (6), quotes (6), equipment (147), and 3rd party (4). A blue box labeled '2' highlights the 'customers' tile. At the bottom of the dashboard, there is a footer with the CO3 Technologies logo and copyright information.

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

1. The **Customers** page will open.
2. Use the **Page Reference** field, **Filter Row** or **Filter Text Box** to find the applicable customer.
3. Click on the selected **Customer icon** in the **View** column.



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

The screenshot shows a CRM dashboard for 'Example Company' with the user 'Abigail Milne'. The main header displays 'Hope Works' with a search bar. Below the header, there are three main sections: 'Activities for Last 30 Days', '1 Month Performance', and '4 Month Pipeline'. The 'Activities for Last 30 Days' section contains a table with columns for Description, Target, Existing Custmrs, and New Custmrs. The '1 Month Performance' section shows a bar chart for Cases, Invoices, Orders, and Quotes. The '4 Month Pipeline' section shows a bar chart for Aug 2019, Sep 2019, Oct 2019, and Nov 2019. A central navigation menu includes icons for create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files. The 'contracts' icon is highlighted with a red circle and a '2'. To the right of the navigation menu, there is a 'Hope Works - HOP001' card with a company logo, trading name, registered name, description, VAT No, registration, rank, website, and phone number. Below this card is a '12 Months Sales History' bar chart showing Contract Income and Sales Revenue from August 2018 to August 2019. The footer includes the CO3 Technologies logo and version information.

THE CONTRACTS FOR [CUSTOMER NAME] PAGE

1. The **Contracts** for [Customer Name] page will open.

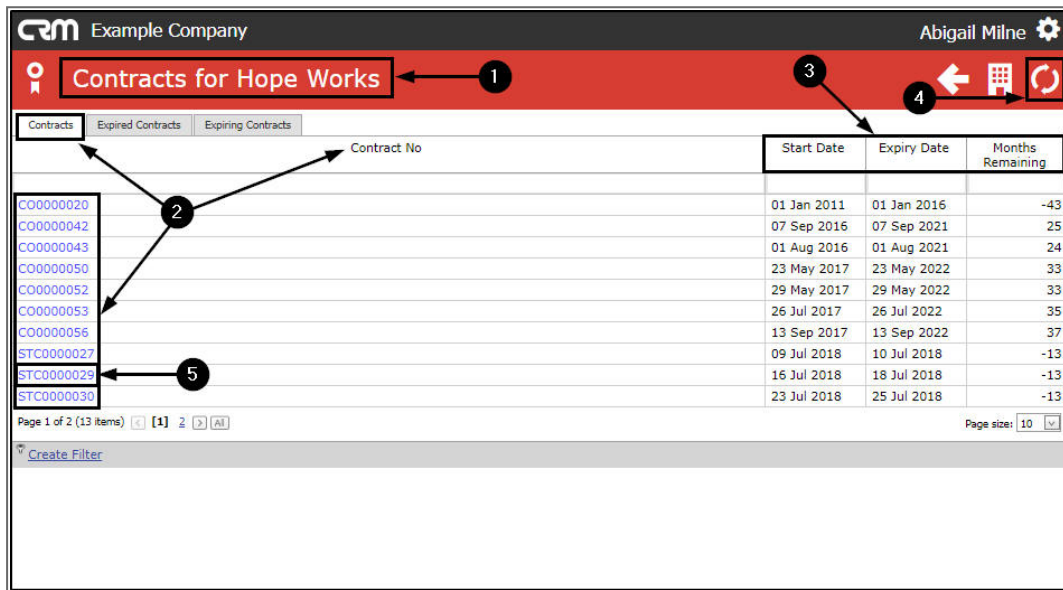
VIEW ALL CONTRACTS

2. The **Contracts** tab will be at the fore which lists, by **Contract No**, all contracts linked to this customer.
3. In this data grid you can view the:
 - **Start Date**,
 - **Expiry Date** and
 - **Months Remaining** for each listed contract.

- Click on the Refresh button at any time to bring the data up to date (if any changes have been made in Nucleus Service, for example).

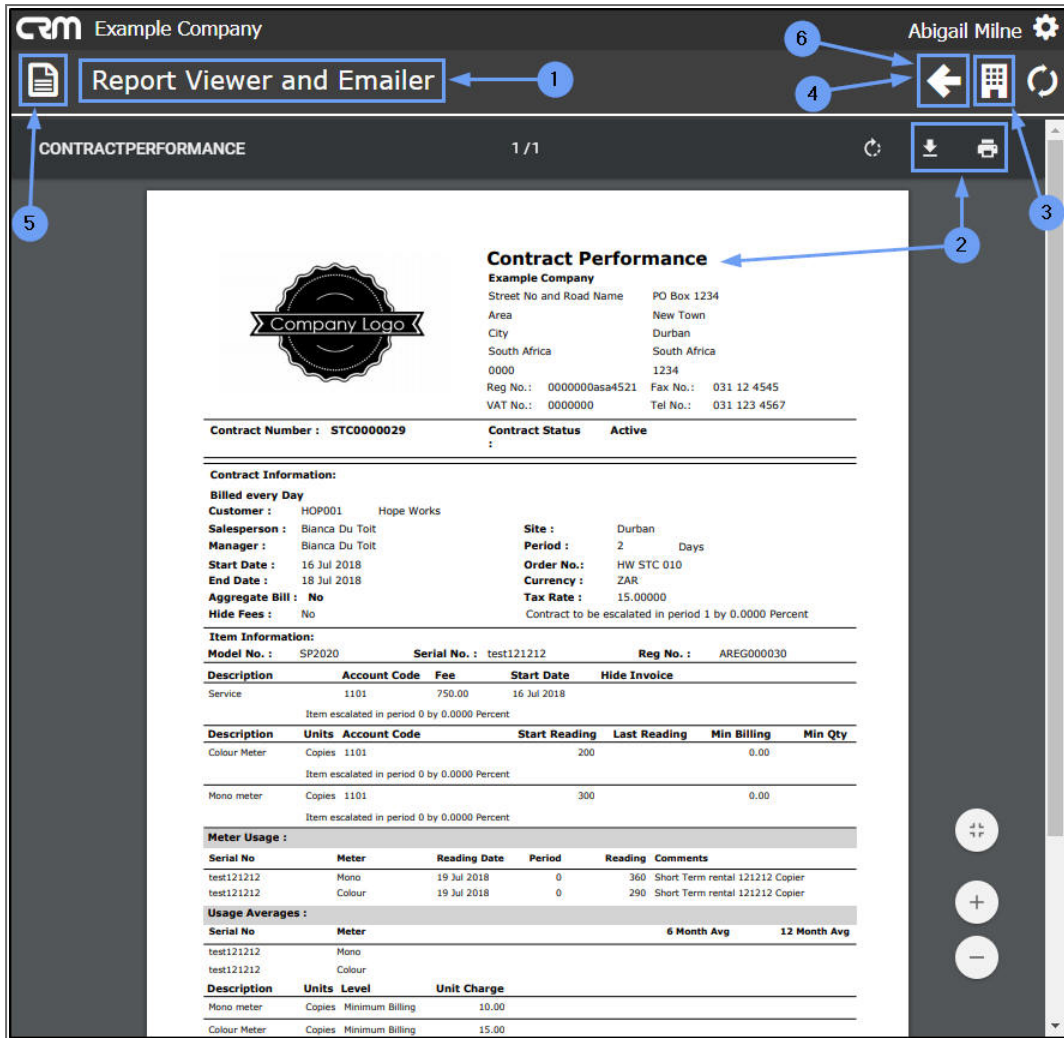
VIEW CONTRACT PERFORMANCE REPORT (CURRENT/ACTIVE CONTRACTS)

- Click on any Contract No. in this list.



Contract No	Start Date	Expiry Date	Months Remaining
CO0000020	01 Jan 2011	01 Jan 2016	-43
CO0000042	07 Sep 2016	07 Sep 2021	25
CO0000043	01 Aug 2016	01 Aug 2021	24
CO0000050	23 May 2017	23 May 2022	33
CO0000052	29 May 2017	29 May 2022	33
CO0000053	26 Jul 2017	26 Jul 2022	35
CO0000056	13 Sep 2017	13 Sep 2022	37
STC0000027	09 Jul 2018	10 Jul 2018	-13
STC0000029	16 Jul 2018	18 Jul 2018	-13
STC0000030	23 Jul 2018	25 Jul 2018	-13

- The **Report Viewer and Emailer** preview screen will be displayed.
- Here, you can view, download and/or print the **Contract Performance** report.
- Either, click on the **Customer** icon to return to the Customer Dashboard (Customer Home page)
- Or, click on the **Back** button to return to the previous page.
- Or, click on the **Page icon** in the top left of the page to return to the Dashboard (Home page).
- For the purpose of this manual, we have selected the **Back** button to return to the previous page.



1. You will return to the **Contracts for [Customer Name]** page.

VIEW EXPIRED CONTRACTS

1. Select the **Expired Contracts** tab. This will list only the expired Contract Nos. linked to this customer.
2. In this screen you can view the:
 - **Start Date**,
 - **Expiry Date** and
 - **Months Remaining** for each listed contract.

- **Note:** As these are expired contracts - the figure in this column will reflect as a negative figure.
3. Click on any **Contract No.** to direct you to the **Report Viewer and EMailer** page where you can view, print and download the **Contract Performance** report.

VIEW EXPIRING CONTRACTS

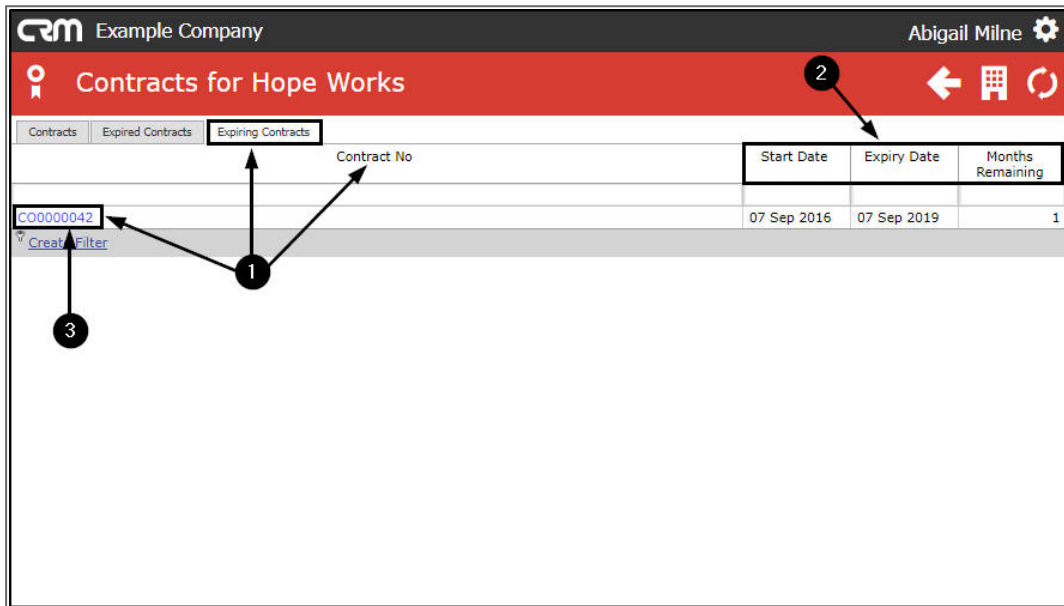
1. Click on the **Expiring Contracts** tab.

Contract No	Start Date	Expiry Date	Months Remaining
CO0000020	01 Jan 2011	01 Jan 2016	-43
STC0000027	09 Jul 2018	10 Jul 2018	-13
STC0000029	16 Jul 2018	18 Jul 2018	-13
STC0000030	23 Jul 2018	25 Jul 2018	-13

1. The **Expiring Contracts** data grid will come to the fore. This will list only the contracts due to expire in the next **6** months.
2. In this screen you can view the:
 - **Start Date,**
 - **Expiry Date** and
 - **Months Remaining** for each listed contract.

VIEW CONTRACT PERFORMANCE REPORT (EXPIRED OR EXPIRING CONTRACTS)

- Click on any **Contract No.** in either of the 2 data grids (Expired Contracts or Expiring Contracts) to view the **Contract Performance** report.



- The **Report Viewer and EMailer** page will open.
- Here you can view, download and/or print the **Contract Performance** report.
- Either, click on the **Customers icon** to return to the Customer Dashboard (Customer Home page).
- Or, click on the **Page icon** in the top left of the page to return to the Dashboard (Home page).
- Or, click on the **Back** button to return to the previous page.
 - For the purpose of this manual, the **Back** button is selected to return you to the **Contracts for [Customer Name]** page.

Contract Performance
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

Contract Number : CO0000042 **Contract Status :** Active

Contract Information:
Billed every Month
Customer : HOP001 Hope Works
Salesperson : Belinda Sharman **Site :** Durban
Manager : Bianca Du Toit **Period :** 36 Months
Start Date : 07 Sep 2016 **Order No.:**
End Date : 06 Sep 2019 **Currency :** ZAR
Aggregate Bill : Yes **Tax Rate :** 14.00000
 Hide Fees : No Contract to be escalated in period 7 by 5.0000 Percent

Item Information:
Model No. : **Serial No. :** **Reg No. :**

Item escalated in period 0 by 0.0000 ZAR

Contract Invoices :

Invoice No	Invoice Date	Salesman	Value
IN0000435	31 Aug 2017	Belinda Sharman	1197.00
IN0000434	31 Jul 2017	Belinda Sharman	1197.00
IN0000402	19 Jun 2017	Belinda Sharman	299.25
IN0000392	14 Jun 2017	Belinda Sharman	299.25
IN0000390	03 Mar 2017	Belinda Sharman	299.25
IN0000381	31 Oct 2016	Belinda Sharman	926.25
IN0000370	26 Oct 2016	Belinda Sharman	926.25
IN0000360	26 Oct 2016	Belinda Sharman	926.25
IN0000351	26 Oct 2016	Belinda Sharman	926.25
IN0000342	18 Oct 2016	Belinda Sharman	926.25
			7923.00

Contract Issues :

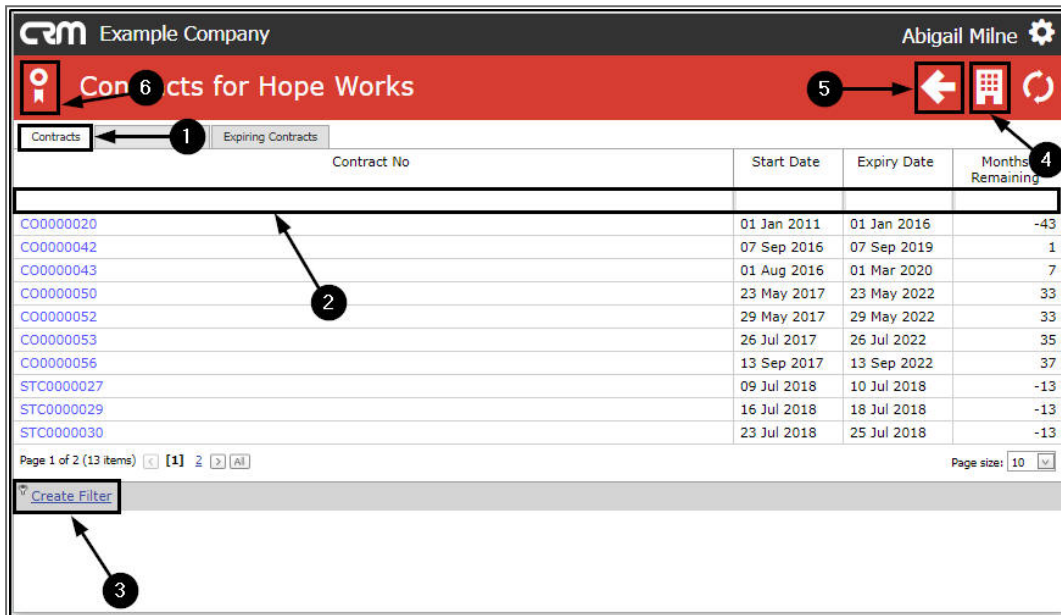
SEARCH FOR A SPECIFIC CONTRACT NO.

To search for a specific contract, it is best to start from the

1. **Contract** data-grid as this will list all contracts; current, expired and due to expire.
2. From here you can use the [Filter Row](#) or the
3. [Create Filter](#) function to search for the applicable contract no.

EXIT THE CONTRACTS FOR [CUSTOMER NAME] PAGE

4. Either, click on the **Customer** icon to return to the Customer Dashboard (Customer Home page)
5. Or, click on the **Back** button to return to the previous page.
6. Or, click on the **Page icon** in the top left of the page to return to the Dashboard (Home page).



CRM.002.011

