

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

CRM CUSTOMERS

CUSTOMER ACTIONS BUTTONS

You can access and add more customer information to **CRM** using the customer **Action buttons**, available in both the **Customers** listing screen and the **Customer Dashboard** (Customer Home page).

Ribbon Access: Webpage > http://[servername]:[portno]/BPOCRM/User.aspx

NAVIGATE TO THE <u>CUSTOMERS LISTING</u> PAGE:

- 1. In the **Dashboard** (Home page),
- 2. Click on the **Customers** tile.
- 3. **Note:** The number in the top left of the tile indicates how many customers that you are linked to.



CCM Exan	nple Cor	npany			Abigail Milne 🌣
🖾 Das	hboard	」 ←	-1	Gearch	Q
Activitie	s for L	ast 30 C	Days		Month Pipeline
Description	Target	Existing Custmrs	New Custmrs	15 000.00 0.40 0.40	
Phone call Email	400 30	0 0	0 0	9 000.00	
Meeting	40	0	0	6 000.00 0.20	
On Site inspection		0	0	3 000.00 0.10	
Site inspection			0	0.00 Cases Invoices Orders Quotes Aug 2019	Sep 2019 Oct 2019 Nov 2019
create cold call	30 Sep 201	144ions 6 147 147	warnings warnings activities activities activities	Today Recent Calendar Schedule Date No data to display	U Status U
				©2019 CO3 Technologies (Pty) Ltd (3.5.6.0 / 3.5.6.0)	

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

VIEW ACTIVE OR RELEASED CUSTOMER ACTION BUTTONS

- 2. Hover anywhere in the row of a selected customer.
- 3. You will note that the customer status in this example is **Active**. (Active and Released customers will display the same Action buttons.)



	Type Custor	ner name sea	rch filter here				۹		
View	Customer	2 Code	Contact	Contact Contact email phone	Complet	Status	Rank	Active	Cal Conta
٠	Hope Works	HOP001	Matthew Thompson	031 123 45€	75%	Active	Plathoum	Yes	Yes
?	IT Supplies	ITS0001			8%	Active	3	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	0210134508	58%	Released	Bronze	No	Yes
?	King Enterprises	KIN0002	Lucy Rowe		50%	Released	Silver	No	Yes
?	Liberty Jones	LIB0001	Jemma Jones	0120230340	58%	New - CRM	Silver	No	Yes
?	Little Bee Honey	LIT0001	John Ginseng	031 123 45€	66%	Active	Silver	No	Yes
?	Lovely Test Customer	LOV0001	Mr Lovely	324234	41%	Released	Platinum	No	Yes

- 1. The <u>Active</u> customer **Action** buttons will be displayed:
 - Edit Customer
 - Add Contact
 - Add Third Party
 - Add Note
 - Maintain Customer Salesmen
 - New Activity
 - New Quote



	Company Example Company							Abi	gail Milı	ne 🌻
Ħ	Customers								- 🖪	0
	Type Customer	- search	filter here					۹		
View	Customer	Code	Contact	Contact phone	Contact email	Complet	Status	Rank	Active	Call Contac
٠	Hope Works	HOP001	Matthew Thompson	031 123 456		75%	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	0210134508		58%	Released	Bronze	No	Yes
?	King Enterprises	KIN0002	Lucy Rowe			50%	Released	Silver	No	Yes
?	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	New - CRM	Silver	No	Yes
?	Little Bee Honey	LIT0001	John Ginseng	031 123 45€		66%	Active	Silver	No	Yes
?	Lovely Test Customer	LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes
age 4 of	58 (73 items) € <u>1</u> 2 3 [4] <u>5</u> <u>6</u> Z <u>8</u> ≥ Al								Page size	: 10 🗸

VIEW <u>NEW-CRM</u> CUSTOMER ACTION BUTTONS

- 1. Hover anywhere in the row of a New CRM customer.
- 2. With <u>New-CRM</u> customers, the Action buttons displayed will include the Release Customer button.



	Customers								;- ₩	C
	Type Customer n	ame search	filter bere					Q		
/iew	Customer	Code	Contact	Contact phone	Contact email	Complet	Status	Rank	Active	Call Conta
•	Hope Works	HOP001	Matthew Thompson	031 123 45€		75%	Active	Platinum	Yes	Yes
?	IT Supplies	ITS0001				8%	Active		No	No
· ?	Joes Carpentry Shop	JOE0001	Mary Watson	031 123 45€		50%	New - CRM	Gold	No	Yes
?	Judes Jewels	JUD0001				8%	New - CRM	Silver	No	No
?	Just In Time	JUS001	0			16%	Active		Yes	No
?	King Copiers	U1100001	Jason King	0210134508		58%	Released	Bronze	No	Yes
?	King Enterprises	KIN0002	Lucy Rowe			50%	Released	Silver	No	Yes
?	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	New - CRM	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
ge 4 of	8 (73 items) < <u>1</u> <u>2</u> <u>3</u> [4] <u>5</u> <u>6</u> <u>7</u> <u>8</u> <u>2</u>	AL							Page size	: 10 🕟

You can either view and add customer information directly from this **Customers** page or you can navigate to the selected **Customer Dashboard** to view the same buttons.

NAVIGATE TO THE <u>CUSTOMERS DASHBOARD</u> (CUSTOMER HOME PAGE) PAGE:

- 1. In the **Customers** listing page,
- 2. Select a specific customer by clicking on the icon next to that customer name, in the **View** column.
- You will note that the customer selected in this example (Hope Works) is an Active customer - this will affect the <u>Action button options</u> that will be available.



Company Example Company							Abi	gail Mil	ne 🌻
Customers 🗲								- 4	- ¢
Type Custom	er name s	search filter here	e			6	۹		
Customer	Code	Contact	Contact phone	Contact email	Complet		Rank	Active	Call Conta
Hope Works	HOP001	Matthew Thompson	031 123 456		75%	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	0210134508		58%	Released	Bronze	No	Yes
King Enterprises	KIN0002	Lucy Rowe			50%	Released	Silver	No	Yes
Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	New - CRM	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
8 (73 items) < <u>1</u> <u>2</u> <u>3</u> [4] <u>5</u> <u>6</u>	Z 8 > AI							Page size	e: 10 🗸
	Customers	Customers Code Type Customer Amount Customer Code Hope Works TITS0001 Tr Supplies TITS0001 Joes Carpentry Shop JOE0001 Judes Jewels JUD0001 Just In Time JUS001 King Copiers KIN0002 Liberty Jones LIB0001	Type Customer Code Contact Lope Works Code Contact To supplies 2 HOP001 Matthew Thompson To supplies 2 HOP001 Matthew Thompson Joes Carpentry Shop JOE0001 Mary Watson Judes Jewels JUD0001 JUS001 King Copiers KIN0001 Jason King King Enterprises KIN0002 Lucy Rowe Liberty Jones LIB0001 Jemma Jones Little Bee Honey LIT0001 Mr Lovely	Image: Search filter here Customer Code Contact Contact Contact Phone Hope Works Code Contact Contact Phone Phone	Image: Search filter here Type Customer name search filter here Customer Code Contact Contact Contact email Hope Works Contact Contact Contact email Contact email To uppe Works T Contact Contact Contact email To uppe Works T TS0001 Matthew Thompson 031 123 45¢ To uppe Savels JUD0001 Mary Watson 031 123 45¢ Judes Jewels JUD0001 Mary Watson 031 123 45¢ Judes Jewels JUD0001 Jason King 0210134508 King Copiers KIN0002 Lucy Rowe Itelever Liberty Jones LIB0001 Jemma Jones 0120230340 Little Bee Honey LIT0001 John Ginseng 031 123 45¢ Lovely Test Customer LOV0001 Mr Lovely 324234	Customers Type Customer name search filter here Customer Code Contact Contact Contact email Complet Hope Works C Code Contact Contact Contact email Complet Hope Works C TS0001 Matthew Thompson 031 123 45€ 75% T Supplies C TS0001 Mary Watson 031 123 45€ 50% Judes Jewels JUD0001 Mary Watson 031 123 45€ 50% Judes Jewels JUD0001 Mary Watson 031 123 45€ 50% Just In Time JUS001 Jason King 0210134508 58% King Copiers KIN0001 Jason King 0210134508 58% Liberty Jones LIB0001 Jemma Jones 0120230340 58% Liberty Jones LIT0001 John Ginseng 031 123 45€ 66% Lovely Test Customer LOV0001 Mr Lovely 324234 41%	Customer Type Customer name search filter here Customer Code Contact Contact Contact email Comple Status Hope Works Code Contact Contact Contact email Comple Status Hope Works O HOP001 Matthew Thompson 031 123 456 75% Active Joes Carpentry Shop JOE0001 Mary Watson 031 123 456 50% New - CRM Judes Jewels JUD0001	Customer name search filter here Customer Code Contact Contact Contact email Comple Status Ank Hope Works Code Contact Contact Contact email Comple Status Ank Hope Works HOP001 Matthew Thompson 031 123 456 75% Active Plainum Ti Supplies 105001 Mary Watson 031 123 456 50% New - CRM Gold Judes Jeweis JUD0001 Mary Watson 031 123 456 50% New - CRM Silver Just In Time JUS001	Customer Code Contact Contact email Comple Status Artive Lustomer Code Contact Contact Contact email Comple Status Artive Artive Hope Works HOP001 Matthew Thompson 031 123 456 75% Active Plainum Yes Jusplies 175001 Matthew Thompson 031 123 456 50% New - CRM Gold No Judes Jewels JUD0001 Mary Watson 031 123 456 50% New - CRM Silver No Just In Time JUS001 Juson King 0210134508 58% Released Bronze No Liberty Jones LIB0001 Jason King 021034508 58% Neeased Silver No Liberty Jones LIB0001 Jemma Jones 0120230340 58% Neeased Silver No Lucely Test Customer L0V001 Mr Lovely 324234 41% Released Plainum No

1. The **Customer Dashboard** (Customer Home page) page will open.

Note: If you wish to have more <u>space</u> on this page to view your customer information more clearly, you can change your page **Settings**.

2. This will **hide** the customer dashboard panel.

Select the 'Hide dashboard panel on customer page' setting

3. Click on the **Settings** icon.



	nple Company e Works	2 3 → 🖸 D → Search Q
Activitie	es for Last 30 Days	1 Month Performance 4 Month Pipeline
Description Phone call Email Meeting On Site inspection Site inspection	Target Existing Custmrs New Custmr 400 0 0 30 0 0 40 0 0 50 0 0 2 0 0	15 000.00 3 000.00 12 000.00 2 500.00 9 000.00 2 500.00 6 000.00 1 500.00 3 000.00 1 500.00 6 000.00 5 00.00 0.00 Cases Invoices 0.00 Cases Invoices 0.00 5ep 2019 Oct 2019 Nov 2019 Dec 2019
create cold call	recommendations	Created: 2014/04/03 1 44: 44 PW Registration 123456789 Rank Platinum Website http://www.hopeworks.co.za Phone 031 123 4567
Quotes	orders invoice	12 Months Sales History
eresti notes	equipment contract	600 300 0 -300 -600
service calls	3rd party Nes	Contract Income Sales Revenue C2019 C03 Technologies (Pty) Ltd (3.5.6.0/ 3.5.6.0)

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





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



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create cold call	recommendations	2 A warnings	settings sa Options Show items for subor	esmen settings dinates	customer ranks	case config	logout	
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			©2019 CO3 Technologies (Pty)	Ltd (3.5.6.0 / 3.5.6	5.0)			

• Click <u>outside</u> of the Settings frame to view the full page <u>without</u> the Dashboard.

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VIEW CUSTOMER INFORMATION: ACTION BUTTONS

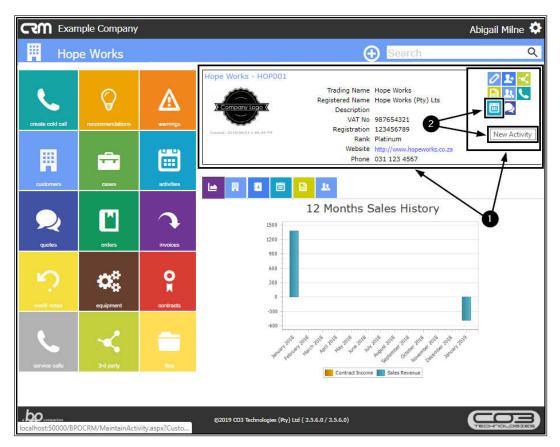
1. Hover anywhere over the Customer Information frame to display the

Action buttons.

- Edit Customer
- Add Contact
- Add Third Party
- Add Note
- Maintain Customer Salesman
- Create Cold Call
- New Activity
- New Quote
- 2. Hover over a specific Action button to display that button description:



Note: You can <u>single click</u> on the Customer Information frame to keep the Action buttons <u>consistently displayed</u> in this frame.



EDIT CUSTOMER

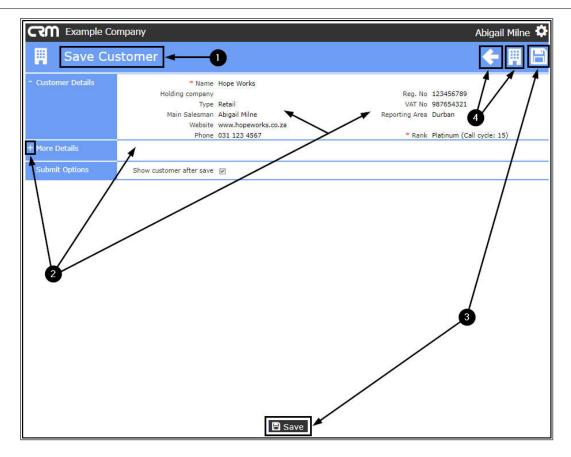
• Click on the Edit Customer action button.



CCM Exan	nple Company		Abigail Milne 🄅
📕 Нор	e Works		🔂 Search 🔍
create cold call	recommendations	A warnings	Hope Works - HOP001 Trading Name Hope Works Registered Name Hope Works (Pty) Lts Description VAT No 987654321 Registration 123456789
cusiomers	cases	activities	Rank Platinum Website http://www.hopeworks.co.za Phone 031 123 4567
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.bo Iocalhost:50000/BP	OCRM/MaintainCon	tact.aspx?Customer	e2019 003 Technologies (Pv) Itd (3.5.6.0 / 3.5.6.0) ID=2&ContactFields=0&customer-name=0&customer_info=2

- 1. The Save Customer page will open.
- 2. In this page you can expand the **More Details** frame and <u>add to</u> or <u>edit</u> the customer details, as required.
- 3. When you are done, you can either **Save** any changes made,
- 4. Or click on either the **Back** icon or the **Customer** icon to return to the previous/Customer page.





ADD CONTACT

- 1. In the **Customer** home page,
- 2. Click on the Add Contact action button.



CRM Exam	nple Company		Abigail Milne 🍄
💾 Нор	e Works –	-0	Search Q
create cold call	recommendations	A warnings	Hope Works - HOP001 Trading Name Hope Works Registered Name Hope Works (Pty) Lts Description VAT No 987554321 Registration 123456789
Ħ	÷		Rank Platinum Website http://www.hopeworks.co.za Phone 031 123 4567
quotes	cases	invoices	12 Months Sales History
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service calls	Sind party	ties .	-600
, boo commention localhost:50000/BP	OCRM/MaintainCon	tact.aspx?Customer	(P2019.003 Tedinekoies (P20) ted (335.6.0/3.35.6.0) ID=2&/NewContact=true&customer-name=0&customer_info=1&/ContactFields=2

- 1. The Save Contact page will open.
- In this page you can expand the Customer Details frame and <u>add to</u> or <u>edit</u> the contact details, as required.
- 3. When you are done, you can either **Save** any changes made,
- 4. Or click on either the **Back** icon or the **Customer** icon to return to the previous/Customer page.

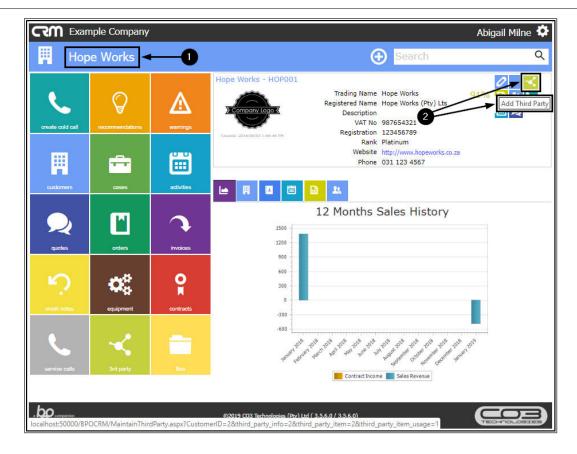


CCM Example Com	ipany			Abigai	il Milne 🍄
👤 Save Cont	tact 🗕 🗍			÷	H B
+ Customer Details				1	11
Contact Info	* First Name * Last Name Preferred Other emails	Title of contact The contact's first name The contact's last name A name the contact prefers Other email addresses separated with semi-colons Any narrative description	Mobile Email Fax	Telephone nurvier Mobile phone nur ber Email addrus Fax number	
Address	1	Address Line 2 Address Line 3 Address Line 4		Post Code Country	
CRM Info			Contact Parent ccepts Sales Calls Send Email		
Submit Options	Show customer after save				
		E Save			

ADD THIRD PARTY

- 1. In the **Customer** home page,
- 2. Click on the Add Third Party action button.

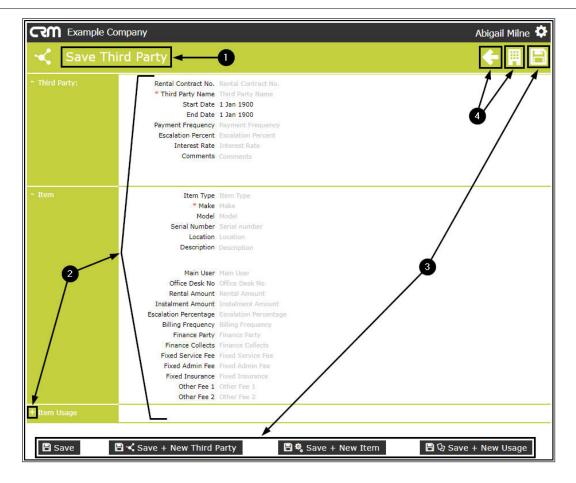




- 1. The **Save Third Party** page will open. This page is for main information regarding the Third Party and the contract details.
- In this page you can expand the Item Usage frame and <u>add to</u> or <u>edit</u> the third party details, as required.
- 3. When you are done, you can either select one of the Save options to keep any changes made,
- 4. Or click on either the **Back** icon or the **Customer** icon to return to the previous/Customer page.

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.





ADD NOTE

- 1. In the **Customer** home page,
- 2. Click on the **Add Note** action button.



CRM Exan	nple Company		Abigail Milne 🌣
Нор	e Works ┥	-0	🔂 Search 🔍
Create cold call	Contraction of the second seco	A warnings	Hope Works - HOP001 Trading Name Hope Works Registered Name Hope Works (Pty) Lts Description VAT No 987654321 Registration 123456789
			Rank Platinum Website http://www.hopeworks.co.za Phone 031 123 4567
customers	cases	activities	
Q	Ľ		12 Months Sales History
quotes	orders	invoices	1500 1200 900 600 300
service calls	Kan Strate Strat	Files	-300 -600 -600 -500 -500 -500 -500 -500 -5
.bo localhost:50000/BPO0	CRM/AddNote.aspx?Cu		©2019 CO3 Technologies (Pty) Ltd (3.5.6.0 / 3.5.6.0)

- 1. The Add Note page will open.
- 2. Type in a note about the customer in the frame outlined.



CCM Example Company	Abigail Milne 🍄
Add Note	🔶 📕 🖻
Notes A note about the customer	
2	
	Save

1. When you have typed in the required note,

Either,

2. Click on **Save**, the note will be saved and you will return to the Customer home page.

Or, if you do not wish to save the note:

3. Click on **Back** to return to the previous page,

or,

4. Click on the **Customer icon** to return to the Customer home page,

or,

5. Click on the **CRM logo** to return to the Dashboard (Home page).

Note: You can view this note (and any other notes linked to this customer) by clicking on the Notes Detail tile in the Customer home page.



С Л	Example Com	pany	Abigail Milne 🍄
	Add Note	3—	- 🗲 🖪 🖻
Notes	5	Existing third party contract pending renewal. Client interested in our new pr	roduct range.
			2
		E Save	

MAINTAIN CUSTOMER SALESMEN

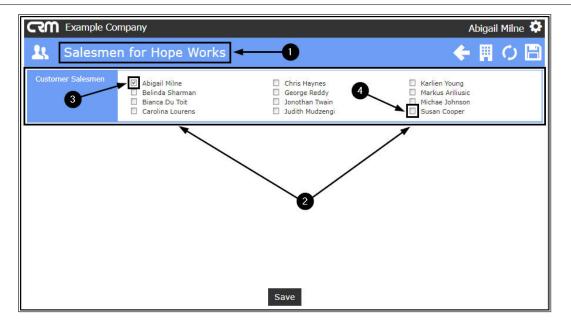
- 1. In the **Customer** home page,
- 2. Click on the Maintain Customer Salesmen action button.



CCM Exan	nple Company		Abigail Milne 🍄	
Нор	e Works <	0	Search Q	
create cold call	recommendations	A warnings	Hope Works - HOP001 Trading Name Hope Works Registered Name Hope Works (Pty) Lts Description VAT No 987654321 Registration 123456789	
customers	cases	activities	Rank Platinum Website http://www.hopeworks.co.za Phone 031 123 4567	
quotes	orders	invoices	12 Months Sales History	
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service calls	Kan San San San San San San San San San S		-300 -600 -600 -500 -500 -500 -500 -500 -5	
Docalhost50000/BPOCRM/MaintainCustomerSalesmen.aspx?CustomerID=2 E2019 003 Technologies (Pxy) Led (3.5.6.0 / 3.5.6.0)				

- 1. The Salesmen for [Customer] page will open.
- 2. Here you can view a list of <u>all</u> the company salespersons (currently set up on the system).
- 3. The names that have a **ticked** check box in front are currently linked to this customer.
- 4. To link <u>another</u> salesman, **select** the check box in front of that salesman's name.





When you have finished making the required changes,

Either,

1. Click on **Save**, your changes will be saved and you will return to the Customer home page.

Or, if you do not wish to save your changes:

2. Click on **Back** to return to the previous page,

or,

- 3. Click on the **Customer icon** to return to the Customer home page, or,
- 4. Click on the **CRM logo** to return to the Dashboard (Home page).

Note: You can view the customer salesmen by clicking on the Salesman Details tile in the Customer home page.



Example Co	mpany	Abigail Milne 🌣	
Salesme	n for Hope Works		₃→買∁⊟
Custome Salesmen	 Abigail Milne Belinda Sharman Bianca Du Toit Carolina Lourens 	Chris Haynes George Reddy Jonothan Twain Judith Mudzengi	 Karlien Young Markus Ariliusic Michae Johnson Ø Susan Cooper
			2
			0
		Save	

CUSTOMER DETAILS - ACTION ITEMS

CREATE COLD CALL FOR CUSTOMER

This will enable creating a cold call specifically for this customer.

- 1. In the **Customer** Home page,
- 2. Click on the **Create Cold Call for Customer** action button.



CCM Example Company Abigail Milne 🌣					
📕 Hope Works 🗲 🕕			ં 2્ વ		
Hop	Contraction of the second seco	A warnings	Hope Works - HOP001 Trading Name Hope Works Registered Name Hope Works (Pty) Lts Description VAT No 987654321 Registration 123456789		
Ħ	÷	i	Rank Platinum Website http://www.hopeworks.co.za Phone 031 123 4567		
customers	cases	invoices	12 Months Sales History		
redit notes	equipment	contracts	1200 900 600 300 0		
service calls	K 3rd party		-300 -600 -600 -600 -600 -600 -600 -600		
bo assessment 62019 003 Technologies (Psy) Ltd (3.5.6.0 / 3.5.6.0)					

- 1. The Create Cold call page will open.
- As this is a cold call created for this existing customer, you will note that the Customer frame will already be populated with this customer's details.
- Complete the remaining cold call details as required. Refer to Creating a Cold Call for more information/directions.

When you have finished making the required changes,

Either,

4. Click on **Save**, your cold call information will be saved and you will return to the Customer home page.

Or, if you do not wish to save your changes:

5. Click on the **Customer icon** to return to the Customer home page,



or,

6. Click on **Back** to return to the previous page,

or,

7. Click on the **CRM logo** to return to the Dashboard (Home page).

Example Company	Abigail Milne 🂠
Create Cold Call	
2 → *Ra Reg.	ner Hope Works Ink Platinum (15 days) Type Retail No 123456789 VAT No 987654321
+ Salesmen	
Control of the second	me Contact's full name one Contact's telephone number Email Email address
Address Line Address Line Sub C Province/St Post Co	ing Address for the contact e 1 Address Line 1 e 2 Address Line 2 urb Suburb Uty City e Province/State de Post Code try Country
3 Informati	ect. The subject of the case ion Additional information relating to the case lue 0
Case Ty	rpe Type of Case Source Type The type of source
+ Related Customers	
* Ty * Subje	nan Abigail Milne Type of activity ect The subject of the activity Ints Additional information relating to the activity
+ Activity Attendees	
CARACTERISTIC CONTRACTOR	ten 9 Oct 2019 from 15:00 to 16:00 der Email SMS 30 minutes before scheduled start
Submit Options Show customer after sa	ave 🗹
	Save

NEW ACTIVITY

This gives you the ability to add a new Case/Activity for the current customer.

- 1. In the **Customer** Home page,
- 2. Click on the **New Activity** action button.





- 1. The Save Activity page will open.
- 2. You will note that the **Customer Name** has auto populated in the **Case** frame.
- 3. Fill in the remaining **Case**, **Activity** and **Quote** details, as required. Refer to Add/Edit an Activity for more information/directions.

When you have finished making the required changes,

Either,

4. Click on **Save**, the new activity will be saved and you will return to the Customer home page.

Or, if you do not wish to save your changes:

5. Click on the **Customer icon** to return to the Customer home page,

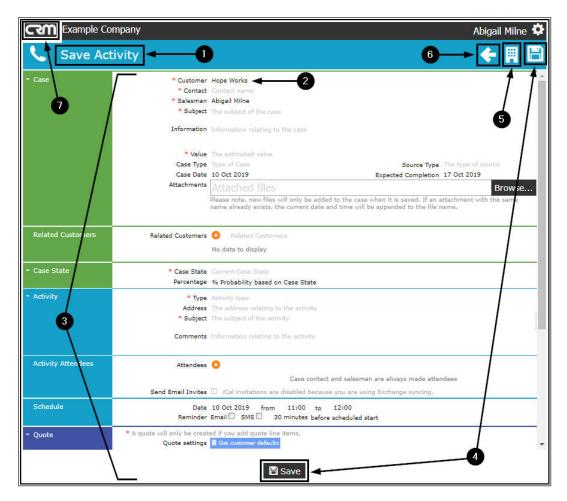
or,



6. Click on **Back** to return to the previous page,

or,

7. Click on the **CRM logo** to return to the Dashboard (Home page).



NEW QUOTE

- 1. In the **Customer** Home page,
- 2. Click on the **New Quote** action button.



CRM Exan	nple Company	â	Abi <u>c</u>	jail Milne 🌣
💾 Нор	e Works <	0	Search	Q
create cold call	recommendations	A warnings	Hope Works - HOP001 Trading Name Hope Works 91% Registered Name Hope Works (Pty) Lts Description VAT No 987654321 Registration 123456789	New Quote
	-	i	Consist: 2014/04/01 1.46.44 MM Prepisoration 1.254-06769 2 Rank Platinum Website http://www.hopeworks.co.za Phone 031 123 4567	New Quote
customers	cases	activities		
Q		•	12 Months Sales History	
quotes	orders	invoices	1500	
redit notes	equipment	contracts	900 600 300 0	
service calls	Srd party.		-500 +600 +600 +600 tota and t	
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- 1. The Save Quote page will open.
- 2. You will note that some of the details in this page have auto populated.
- Fill in the remaining Case, Quote, Quote Financials and Quote Items details, as required. Refer to Add a New Quote for more information/directions.

When you have finished making the required changes,

Either,

4. Click on **Save**, the new activity will be saved and you will return to the Customer home page.

Or, if you do not wish to save your changes:

5. Click on the **Customer icon** to return to the Customer home page,

or,

6. Click on **Back** to return to the previous page,



or,

7. Click on the **CRM logo** to return to the Dashboard (Home page).

Example Company			Abigail Milne 🌣
Save Quote ┥	-0		6
+ Case	Subject (No case linked	1
• • • • • • • • • • • • • • • • • • •	* Customer + Quote Contact S ote Reference + Reference +	Select Date	10 Oct 2019 Select HOP001_SALESQUOTE
- Quote Financials	* Currency 5 Tax Rate 1 xchange Rate 1	15.00 Commercial	Full Payment COD Default
- Quote Items Prag a colum	Add item Add template nn here	그는 사람들은 전자가 안 집에서 가지 않는 것이 같아요.	
		No data to display	
		E Save	4

RELEASE CUSTOMER

Note: This Release action button is <u>only</u> available for a customer that is in status: New - CRM. Once the customer has moved from New - CRM to Released, your accounts department can check/update all financial details and then either Approve or Decline the Customer (this will move the customer to the Active status if Approved or back to the New status if Declined).

- 1. In the (New CRM) Customer Home page,
- 2. Click on the **Release Customer** action button.



CCM Exan	nple Company			Abigail Milne 🍄
📕 Libe	erty Jones	0	Search	Q
create cold call	Contract of the second	A warnings	Liberty Jones - LIB0001 Trading Name Liberty Jones Registered Name Liberty Jones Description Household and Clothing Stores Head Office	58%
customers	cases	activities	Centred: 3019(06/21 2:37:40 94. VAT No Rank Silver Website http:// Phone 0120230340	
quotes	orders	invoices	Le P I I I I Annu La Constanti I I Months Sales History	
eredit notes	QU	contracts	0.4 0.35 0.25 0.2 0.15	
service calls	Kan Sind party	Res	0.1 0.05 0 10000000000000000000000000000	No 100
Contract Income Seles Revenue				

- 1. The Release Customer page will open.
- 2. A message will display on this page:
 - Are you sure you want to release this customer? Click the Back button to cancel.

Either,

3. Click on the **Yes, Release Customer** button or the **Save** button to release this customer.

Or, if you do not wish to release this customer:

- 4. Click on the **Customer icon** to return to the Customer home page, or,
- 5. Click on **Back** to return to the previous page,

or,

6. Click on the **CRM logo** to return to the Dashboard (Home page).



		Abigail Milne 🍄
🚆 Release Customer 🗲	-0	5 → 🗲 🛒 🔁
Are you sure you want to release this cu	stomer?	t t
Click the back button to cancel. Liberty Jones - LIB0001		
Trading Name Registered Name Description VAT No Rank Website	Liberty Jones Household and Clothing Stores Head Office Silver	58%
	윈 Yes, Release Customer	

- 1. If you released the customer, you will return to the Customer Home page.
- 2. Note that the Release Customer button is no longer available.

This customer will now need to be **Approved** in BPO in order to become Active.





CRM.002.014

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