

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     | <b>」</b> ←                 | -1   | Gearch   | Q                          |
| Activitie             | s for L    | ast 30 C                   | Days   |  | Month Pipeline             |
| Description           | Target     | Existing<br>Custmrs        | New<br>Custmrs   | 15 000.00 0.40 0.40  |                            |
| Phone call<br>Email   | 400<br>30  | 0<br>0                     | 0<br>0   | 9 000.00   |                            |
| Meeting               | 40         | 0                          | 0  | 6 000.00 0.20  |                            |
| On Site<br>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<br>6<br>147<br>147 | warnings<br>warnings<br>activities<br>activities<br>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<br>phone | Complet | Status    | Rank     | Active | Cal<br>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<br>phone | Contact email | Complet | Status    | Rank     | Active    | Call<br>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 <b>[4]</b> <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<br>Conta |
| •       | Hope Works   | HOP001     | Matthew Thompson | 031 123 45€   |               | 75%     | Active    | Platinum | Yes       | Yes           |
| ?       | IT Supplies  | ITS0001    |                  |               |               | 8%      | Active    |          | No        | No            |
| ·<br>?  | 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<br>phone   | Contact email   | Complet  |   | Rank  | Active   | Call<br>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<br>e Works   | 2 3 → 🖸<br>D → Search Q   |
|---|---|---|
| Activitie   | es for Last 30 Days   | 1 Month Performance 4 Month Pipeline  |
| Description<br>Phone call<br>Email<br>Meeting<br>On Site<br>inspection<br>Site inspection | Target         Existing<br>Custmrs         New<br>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<br>Rank Platinum<br>Website http://www.hopeworks.co.za<br>Phone 031 123 4567   |
| Quotes  | orders invoice  | 12 Months Sales History   |
| eresti notes  | equipment contract  | 600<br>300<br>0<br>-300<br>-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.



| BPO2_HelpF                               | File_Progress.xlsx | × 🔯 bpo C       | RM - Hope Works   | × +                                      |                          |                          | - 0             | ×   |
|--|--------------------|-----------------|---|--|--------------------------|--------------------------|-----------------|-----|
| $\leftarrow \  \   \rightarrow \  \   G$ | (i) localhost:5    | 0000/BPOCRM/V   | ewCustomer.aspx?Custo   | merID=2                                  |                          |                          | ର 🕁 🥃           | :   |
| CCM Exam                                 | nple Company       | r               |   |  |                          |                          | Abigail Miln    | e 🏟 |
| 📕 Нор                                    | e Works            |                 | *   | 1  | *                        |                          | Ŀ               | ŀ   |
| create cold call                         | recommendations    | 2 A<br>warnings | settings sa<br>Options<br>Show items for subor                        | esmen settings<br>dinates                | customer ranks           | case config              | logout          |     |
|  | <del></del>        | activities      | Exclude deleted custo<br>Hide dashboard panel<br>Hide dashboard panel | omers in search<br>I<br>I on customer pa |                          |                          |                 |     |
| customers                                |                    |                 |   |  | nths Sales               | History                  |                 |     |
| quotes                                   | orders             | invoices        | 1200  |  |                          |                          |                 |     |
| L.S.                                     | <b>Q</b> 0         | Ŷ               | 600<br>300<br>0   |  |                          |                          |                 |     |
|  | equipment          |                 | -300<br>-600  | Super Price Date Sort Price              | A DIA HAR DIA TATA A DIA | 1918 1919 1919 1918 1918 | 6 <sup>19</sup> |     |
| service calls                            | 3rd party          | files           | -1 <sup>674</sup> 4 <sup>35</sup>                                     |  | ontract Income 🗾 Sales   |                          |                 |     |
|  |                    |                 | ©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**

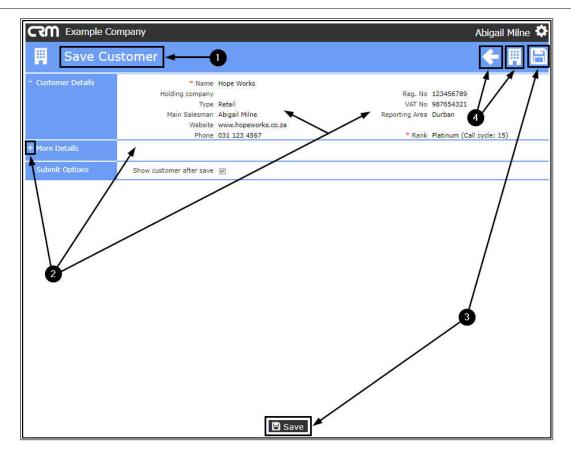
• Click on the Edit Customer action button.



| CCM Exan                  | nple Company                            |                    | Abigail Milne 🄅   |
|---------------------------|---|--------------------|---|
| 📕 Нор                     | e Works                                 |                    | 🔂 Search 🔍  |
| create cold call          | recommendations                         | A<br>warnings      | Hope Works - HOP001<br>Trading Name Hope Works<br>Registered Name Hope Works (Pty) Lts<br>Description<br>VAT No 987654321<br>Registration 123456789 |
| cusiomers                 | cases                                   | activities         | Rank Platinum<br>Website http://www.hopeworks.co.za<br>Phone 031 123 4567   |
| Quotes                    | orders                                  | invoices           | 12 Months Sales History   |
| redit notes               | equipment                               | oontracts          | 900<br>600<br>300<br>   |
| service calls             | Kan |                    | -500<br>-600<br>  |
| .bo<br>Iocalhost:50000/BP | OCRM/MaintainCon                        | tact.aspx?Customer | e2019 003 Technologies (Pv) Itd (3.5.6.0 / 3.5.6.0)<br>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<br>warnings      | Hope Works - HOP001<br>Trading Name Hope Works<br>Registered Name Hope Works (Pty) Lts<br>Description<br>VAT No 987554321<br>Registration 123456789 |
| Ħ                                      | ÷                | <b></b>            | Rank Platinum<br>Website http://www.hopeworks.co.za<br>Phone 031 123 4567   |
| quotes                                 | cases            | invoices           | 12 Months Sales History   |
| redit notes                            | CC Republic      | ontracts           | 900<br>600<br>300<br>   |
| service calls                          | Sind party       | ties .             | -600<br>  |
| , boo commention<br>localhost:50000/BP | OCRM/MaintainCon | tact.aspx?Customer | (P2019.003 Tedinekoies (P20) ted (335.6.0/3.35.6.0)<br>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<br>* Last Name<br>Preferred<br>Other emails | Title of contact<br>The contact's first name<br>The contact's last name<br>A name the contact prefers<br>Other email addresses separated with semi-colons<br>Any narrative description | Mobile<br>Email<br>Fax                             | Telephone nurvier<br>Mobile phone nur ber<br>Email addrus<br>Fax number |            |
| Address            | 1  | Address Line 2<br>Address Line 3<br>Address Line 4   |  | Post Code<br>Country  |            |
| CRM Info           |  |  | Contact Parent<br>ccepts Sales Calls<br>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.

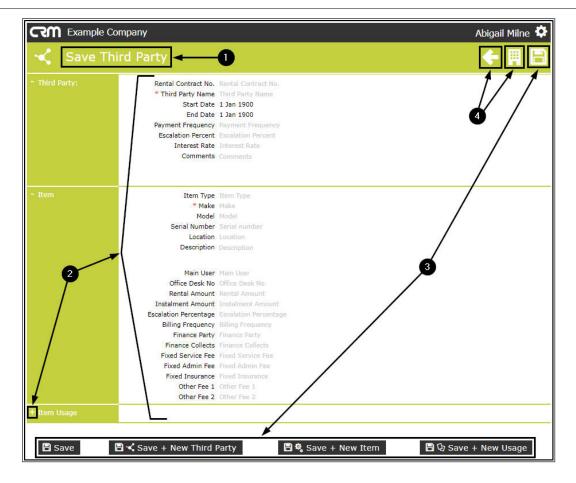




- 1. The **Save Third Party** page will open. This page is for main information regarding the Third Party and the contract details.
- In this page you can expand the Item Usage frame and <u>add to</u> or <u>edit</u> the third party details, as required.
- 3. When you are done, you can either select one 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<br>warnings | Hope Works - HOP001<br>Trading Name Hope Works<br>Registered Name Hope Works (Pty) Lts<br>Description<br>VAT No 987654321<br>Registration 123456789 |
|                             | <del></del>  | <b></b>       | Rank Platinum<br>Website http://www.hopeworks.co.za<br>Phone 031 123 4567   |
| customers                   | cases  | activities    |   |
| Q                           | Ľ  |               | 12 Months Sales History   |
| quotes                      | orders   | invoices      | 1500<br>1200<br>900<br>600<br>300   |
| service calls               | Kan Strate Strat | Files         | -300<br>-600<br>-600<br>-500<br>-500<br>-500<br>-500<br>-500<br>-5  |
| .bo<br>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<br>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

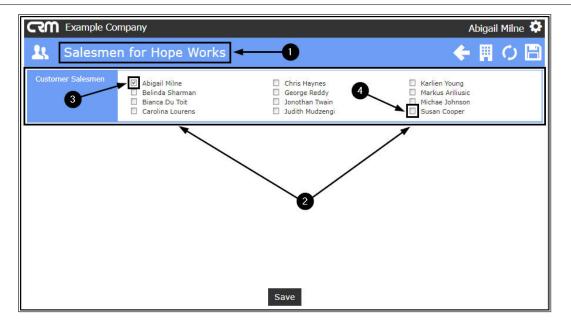
- 1. In the **Customer** home page,
- 2. Click on the Maintain Customer Salesmen action button.



| CCM Exan   | nple Company                              |               | Abigail Milne 🍄   |  |
|--|---|---------------|---|--|
| Нор  | e Works <                                 | 0             | Search Q  |  |
| create cold call   | recommendations                           | A<br>warnings | Hope Works - HOP001<br>Trading Name Hope Works<br>Registered Name Hope Works (Pty) Lts<br>Description<br>VAT No 987654321<br>Registration 123456789 |  |
| customers  | cases                                     | activities    | Rank Platinum<br>Website http://www.hopeworks.co.za<br>Phone 031 123 4567   |  |
| quotes   | orders                                    | invoices      | 12 Months Sales History   |  |
| srædit notes   | ¢;  | ontracts      | 1200<br>900<br>600<br>300<br>0  |  |
| service calls  | Kan San San San San San San San San San S |               | -300<br>-600<br>-600<br>-500<br>-500<br>-500<br>-500<br>-500<br>-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 | <ul> <li>Abigail Milne</li> <li>Belinda Sharman</li> <li>Bianca Du Toit</li> <li>Carolina Lourens</li> </ul> | Chris Haynes<br>George Reddy<br>Jonothan Twain<br>Judith Mudzengi | <ul> <li>Karlien Young</li> <li>Markus Ariliusic</li> <li>Michae Johnson</li> <li>Ø Susan Cooper</li> </ul> |
|                  |  |   | 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<br>warnings | Hope Works - HOP001<br>Trading Name Hope Works<br>Registered Name Hope Works (Pty) Lts<br>Description<br>VAT No 987654321<br>Registration 123456789 |  |  |
| Ħ   | ÷  | i             | Rank Platinum<br>Website http://www.hopeworks.co.za<br>Phone 031 123 4567   |  |  |
| customers   | cases  | invoices      | 12 Months Sales History   |  |  |
| redit notes   | equipment  | contracts     | 1200<br>900<br>600<br>300<br>0  |  |  |
| service calls   | K<br>3rd party   |               | -300<br>-600<br>-600<br>-600<br>-600<br>-600<br>-600<br>-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<br>Reg.   | ner Hope Works<br>Ink Platinum (15 days) Type Retail<br>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<br>Address Line<br>Sub<br>C<br>Province/St<br>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<br>ion Additional information relating to the case<br>lue 0   |
| Case Ty   | rpe Type of Case Source Type The type of source  |
| + Related Customers   |  |
| * Ty<br>* Subje   | nan Abigail Milne<br>Type of activity<br>ect The subject of the activity<br>Ints Additional information relating to the activity |
| + Activity Attendees  |  |
| CARACTERISTIC CONTRACTOR | ten 9 Oct 2019 from 15:00 to 16:00<br>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,

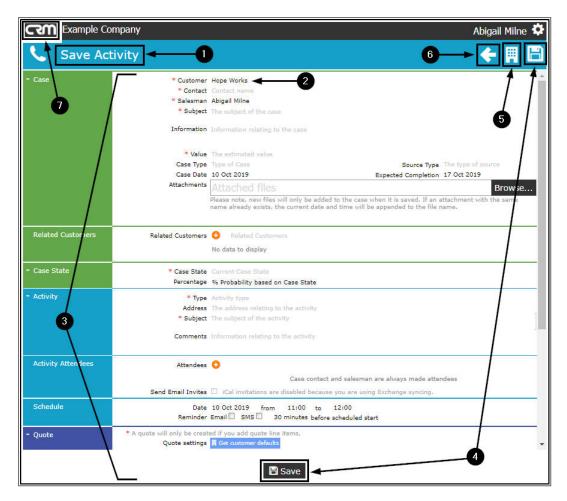
or,



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<br>warnings      | Hope Works - HOP001<br>Trading Name Hope Works 91%<br>Registered Name Hope Works (Pty) Lts<br>Description<br>VAT No 987654321<br>Registration 123456789   | New Quote    |
|                  | <del>-</del>    | i                  | Consist: 2014/04/01 1.46.44 MM Prepisoration 1.254-06769 2<br>Rank Platinum<br>Website http://www.hopeworks.co.za<br>Phone 031 123 4567   | New Quote    |
| customers        | cases           | activities         |   |              |
| Q                |                 | •                  | 12 Months Sales History   |              |
| quotes           | orders          | invoices           | 1500  |              |
| redit notes      | equipment       | contracts          | 900<br>600<br>300<br>0  |              |
| service calls    | Srd party.      |                    | -500<br>+600<br>+600<br>+600 tota and t |              |
| .bo              | DOCRM/MaintainC | luoto serv?( ueton | Expansional Technological (2001) 10 (13,560 (13,550))<br>part/D - 20/rase info - 12/rase info classical info classical info classical info biot - 12/rase info classical info   | Ractivit     |

- 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 +<br>Quote Contact S<br>ote Reference +<br>Reference + | Select Date                     | 10 Oct 2019<br>Select<br>HOP001_SALESQUOTE |
| - Quote Financials                    | * Currency 5<br>Tax Rate 1<br>xchange Rate 1                      | 15.00 Commercial                | Full Payment COD<br>Default                |
| - Quote Items<br>Prag a colum         | Add item<br>Add template<br>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<br>warnings | Liberty Jones - LIB0001<br>Trading Name Liberty Jones<br>Registered Name Liberty Jones<br>Description Household and<br>Clothing Stores<br>Head Office | 58%             |
| customers                     | cases   | activities    | Centred: 3019(06/21 2:37:40 94. VAT No<br>Rank Silver<br>Website http://<br>Phone 0120230340  |                 |
| quotes                        | orders  | invoices      | Le P I I I I Annu La Constanti I I Months Sales History   |                 |
| eredit notes                  | <b>QU</b>   | contracts     | 0.4<br>0.35<br>0.25<br>0.2<br>0.15  |                 |
| service calls                 | Kan Sind party  | Res           | 0.1<br>0.05<br>0<br>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.<br>Liberty Jones - LIB0001                 |  |                 |
| Trading Name<br>Registered Name<br>Description<br>VAT No<br>Rank<br>Website | Liberty Jones<br>Household and Clothing Stores Head Office<br>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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