

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

CRM BASICS

VIEW / PRINT / EMAIL A QUOTE

A **full list of Quotes** can be accessed from the Dashboard (Home page), or **customer-specific Quotes** can be accessed from the Customer Dashboard (Customer Home page).

Quotes in either of these pages can be: Viewed, Downloaded, Printed and Emailed.

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

LIST OF ALL QUOTES

(linked to you as the Salesman) from the [Dashboard](#)

1. In the **Dashboard**,
2. Click on the **Quotes** tile.
3. The number in the top right of this tile shows the total number of **New**, **Accepted** and **Rejected** Quotes (for all customers) that are linked to you as the Salesman.



1. The **Quotes** listing page will open.
2. A list of **New**, **Accepted** and **Rejected** quotes for all customers on the system, where you are the Salesman, will be displayed.
3. Use the **Page Reference** field, or the **Filter Row** to search for a particular quote.

Follow the process to

- **View**,
 - **Download**,
 - **Print** or
 - **Email**
- the selected Quote, as required.

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. A 'Quotes' dashboard tile is highlighted with a circled '1'. Below the tile is a table with the following data:

| Quote Ref | Customer Code | Customer Name | Quote Description | Quote Value | Currency | Quote Date | Quote Status | Overdue |
|-----------|---------------|------------------|-------------------|-------------|----------|-------------|----------------|---------|
| QT0000206 | HOP001 | Hope Works | HW Q-0123 | 1380.00 | ZAR | 21 May 2018 | New quote | Yes |
| QT0000207 | HOP001 | Hope Works | QAB11/10/2018 | 1398.40 | ZAR | 12 Oct 2018 | New quote | Yes |
| QT0000209 | HOP001 | Hope Works | Q9001 | 506.00 | ZAR | 25 Feb 2019 | Accepted quote | Yes |
| QT0000210 | HOP001 | Hope Works | HWQ000444 | 9616.16 | ZAR | 17 Jun 2019 | New quote | Yes |
| QT0000211 | KIN0002 | King Enterprises | Q/KE/001 | 6815.62 | ZAR | 19 Jul 2019 | Accepted quote | Yes |
| QT0000212 | KIN0001 | King Copiers | Q/KC/9002 | 13025.62 | ZAR | 30 Jul 2019 | New quote | Yes |
| QT0000213 | TRA0001 | Training Wheels | TW001 | 31050.00 | ZAR | 14 Oct 2019 | Accepted quote | Yes |
| QT0000214 | HOP001 | Hope Works | HW/Q199 | 7436.62 | ZAR | 24 Oct 2019 | Rejected quote | Yes |
| QT0000215 | KIN0001 | King Copiers | KCQU101 | 13025.62 | ZAR | 31 Oct 2019 | New quote | No |
| QT0000218 | HOP001 | Hope Works | | 6210.00 | ZAR | 12 Nov 2019 | New quote | No |

At the bottom of the table, there is a pagination control showing 'Page 1 of 2 (13 items)' and a 'Page size' dropdown set to '10'. Annotations 2 and 3 point to these controls. Annotation 2 points to the 'Page size' dropdown, and annotation 3 points to the 'Page 1 of 2 (13 items)' text.

CUSTOMER SPECIFIC QUOTES

1. In the **Dashboard**,
2. Click on the **Customers** tile.
3. The number in the top right of this tile shows the total number of **Cus-tomers**, on the System.

CRM Example Company Abigail Milne

Dashboard Search

| Description | Target | Existing Custmrs | New Custmrs |
|--------------------|--------|------------------|-------------|
| Phone call | 20 | 2 | 2 |
| Email | 30 | 2 | 1 |
| Meeting | 20 | 0 | 2 |
| On Site inspection | 20 | 1 | 0 |
| Site inspection | 2 | 0 | 0 |

1 Month Performance

| Category | Value |
|----------|------------|
| Cases | ~10,000.00 |
| Invoices | ~15,000.00 |
| Orders | ~12,000.00 |
| Quotes | ~35,000.00 |

4 Month Pipeline

| Month | Value |
|----------|-----------|
| Nov 2019 | ~6,000.00 |
| Dec 2019 | ~2,000.00 |
| Jan 2020 | ~2,000.00 |
| Feb 2020 | ~2,000.00 |

Grid of Tiles:

- create cold call: 3
- recommendations: 19
- warnings: 9
- customers: 75
- cases: 8
- activities: 7
- quotes: 13
- equipment: 147
- 3rd party: 8

Table Area: No data to display

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1. The **Customers** listing page will 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 a CRM interface for 'Example Company' with user 'Abigail Milne'. The 'Customers' dashboard is active. A search filter is present above a table of customer records. Annotations 1-5 point to the 'Customers' tile, the search filter, a contact phone number, the pagination controls, and a specific customer record respectively.

| View | Customer | Code | Contact | Contact phone | Contact email | Comple | Status | Rank | Active | Call Contact |
|------|-------------------------|-----------|-------------------|---------------|---------------|--------|-----------|---------|--------|--------------|
| ? | Maggies Clothing Shop | MAG0001 | Maggie Smith | | | 33% | Released | Gold | No | Yes |
| ? | Mandy Norton | MAN0001 | | | | 8% | Active | | No | No |
| ? | Marks Building Supplies | MAR0001 | | | | 8% | Active | | No | No |
| ? | Mary Contrary | HIL000001 | | | | 8% | Active | | No | No |
| ? | Maxi Mobile | MAX0001 | George Lanchester | 031 123 456 | | 41% | Active | | No | Yes |
| ? | Mike Goldwen | SHO00000 | | | | 8% | Released | Plastic | No | No |
| ? | Milne Associates | MIL0001 | Mark | 0123405678 | | 50% | New - CRM | Wood | No | Yes |
| ? | Most Wonderful Customer | MOS0001 | Wonder Boy | | | 25% | Released | | No | Yes |
| ? | Network and Accessories | NET002 | | | | 16% | Active | Gold | No | No |
| ? | Networking and Laptops | NET001 | John Jackson | | | 50% | Active | Metal | No | Yes |

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

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main header displays 'Milne Associates' with a search bar. Below this, there are three charts: 'Activities for Last 30 Days', '1 Month Performance', and '4 Month Pipeline'. A central panel shows customer details for 'Milne Associates - MIL0001' with a 50% completion indicator. A grid of icons provides navigation to various functions like 'quotes', 'orders', 'invoices', etc. A '12 Months Sales History' chart is also visible at the bottom right.

| Description | Target | Existing Custmrs | New Custmrs |
|--------------------|--------|------------------|-------------|
| Phone call | 20 | 2 | 2 |
| Email | 30 | 2 | 1 |
| Meeting | 20 | 0 | 2 |
| On Site Inspection | 20 | 1 | 0 |
| Site inspection | 2 | 0 | 0 |

| Category | Value |
|----------|------------|
| Cases | ~10,000.00 |
| Invoices | ~15,000.00 |
| Orders | ~10,000.00 |
| Quotes | ~35,000.00 |

| Month | Value |
|----------|-----------|
| Nov 2019 | ~6,000.00 |
| Dec 2019 | ~2,000.00 |
| Jan 2020 | 0.00 |
| Feb 2020 | 0.00 |

Milne Associates - MIL0001

Trading Name: Milne Associates (50%)
 Registered Name: Milne Associates
 Description: VAT No
 Rank: Wood
 Website: Http://
 Phone: 0123405678

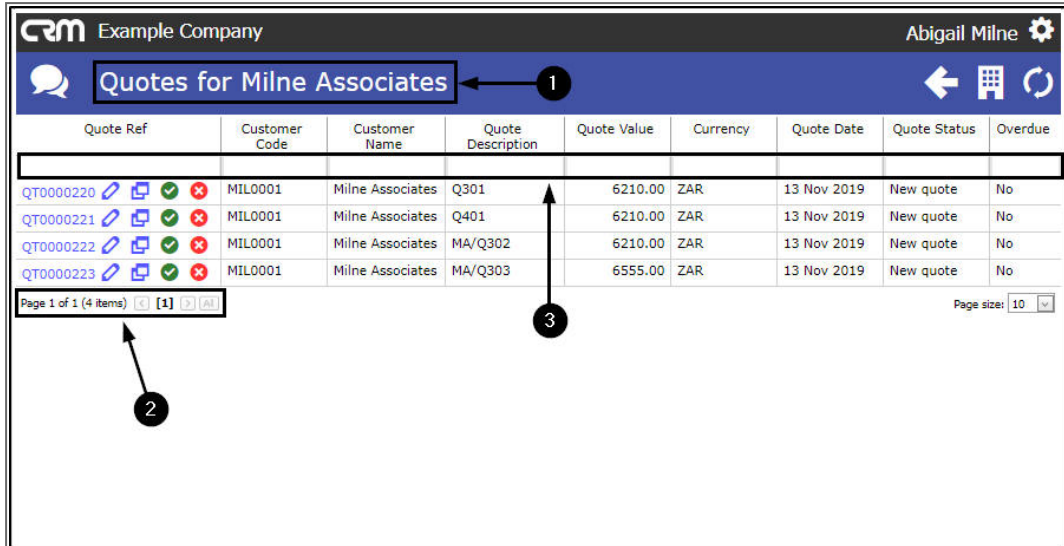
Created: 2019/06/19 3:00:04 PM

12 Months Sales History

| Month | Contract Income | Sales Revenue |
|----------------|-----------------|---------------|
| January 2018 | 0.00 | 0.00 |
| February 2018 | 0.00 | 0.00 |
| March 2018 | 0.00 | 0.00 |
| April 2018 | 0.00 | 0.00 |
| May 2018 | 0.00 | 0.00 |
| June 2018 | 0.00 | 0.00 |
| July 2018 | 0.00 | 0.00 |
| August 2018 | 0.00 | 0.00 |
| September 2018 | 0.00 | 0.00 |
| October 2018 | 0.00 | 0.00 |
| November 2018 | 0.00 | 0.00 |
| December 2018 | 0.00 | 0.00 |
| January 2019 | 0.00 | 0.00 |

1. The **Quotes for [selected customer]** page will open.
 - All of the quotes linked to this customer will be displayed (even ones where you are not the Salesman).
2. You can use the **Page Reference field** or the
3. **Filter Row** to search for a particular Quote.

Follow the process to **View, Download, Print** or **Email** the selected Quote, as required.



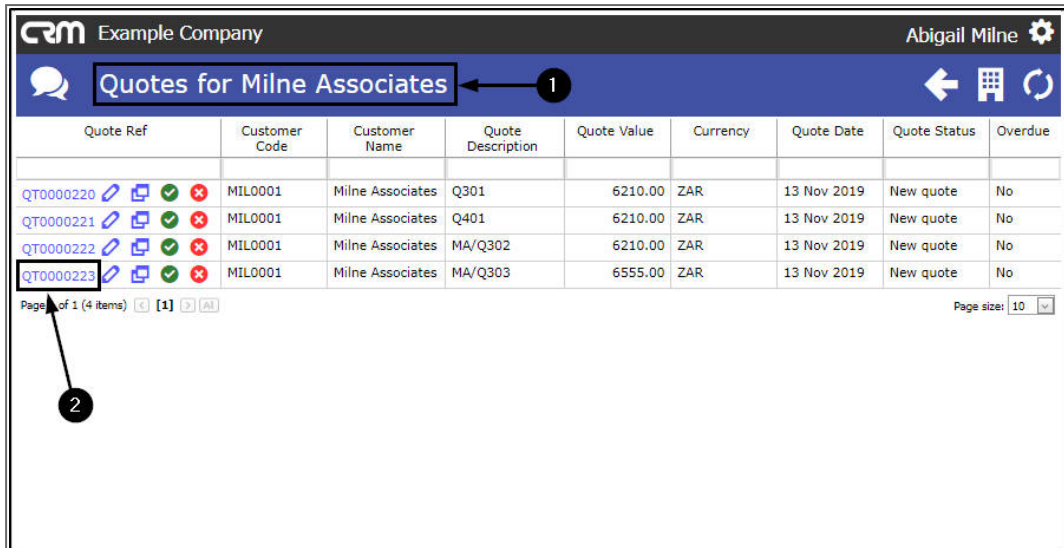
| Quote Ref | Customer Code | Customer Name | Quote Description | Quote Value | Currency | Quote Date | Quote Status | Overdue |
|-----------|---------------|------------------|-------------------|-------------|----------|-------------|--------------|---------|
| QT0000220 | MIL0001 | Milne Associates | Q301 | 6210.00 | ZAR | 13 Nov 2019 | New quote | No |
| QT0000221 | MIL0001 | Milne Associates | Q401 | 6210.00 | ZAR | 13 Nov 2019 | New quote | No |
| QT0000222 | MIL0001 | Milne Associates | MA/Q302 | 6210.00 | ZAR | 13 Nov 2019 | New quote | No |
| QT0000223 | MIL0001 | Milne Associates | MA/Q303 | 6555.00 | ZAR | 13 Nov 2019 | New quote | No |

Page 1 of 1 (4 items) [1] [2] [3] [4] Page size: 10

VIEW A QUOTE

In either the Quotes listing page or the Quotes for [selected customer] page you can search for and **View**, **Download**, **Print** or **Email** a selected Quote. For the purpose of this manual, we will start from the Quotes for [selected customer] page.

1. In the **Quotes for [selected customer]** page,
2. Click on the blue **number** of the Quote that you wish to **View**, **Download**, **Print** or **Email** .



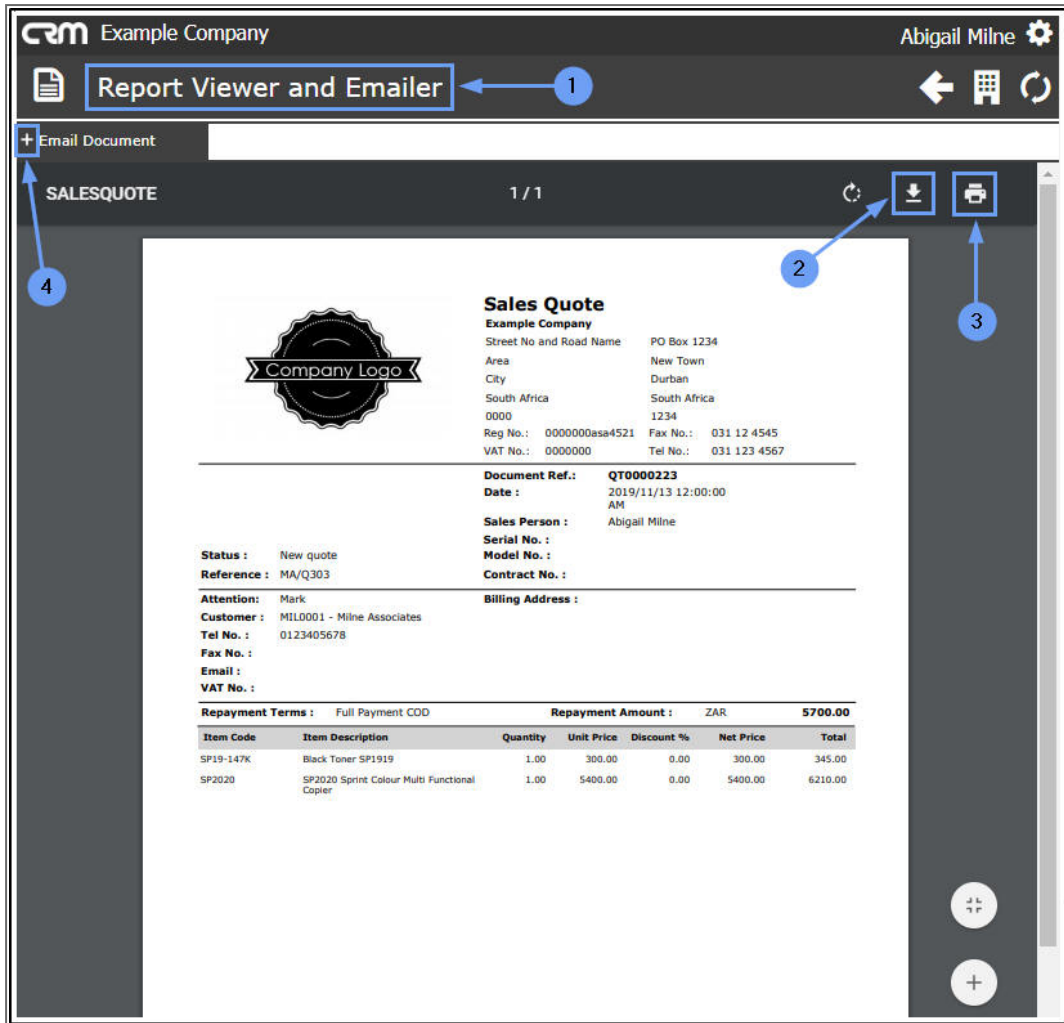
| Quote Ref | Customer Code | Customer Name | Quote Description | Quote Value | Currency | Quote Date | Quote Status | Overdue |
|-----------|---------------|------------------|-------------------|-------------|----------|-------------|--------------|---------|
| QT0000220 | MIL0001 | Milne Associates | Q301 | 6210.00 | ZAR | 13 Nov 2019 | New quote | No |
| QT0000221 | MIL0001 | Milne Associates | Q401 | 6210.00 | ZAR | 13 Nov 2019 | New quote | No |
| QT0000222 | MIL0001 | Milne Associates | MA/Q302 | 6210.00 | ZAR | 13 Nov 2019 | New quote | No |
| QT0000223 | MIL0001 | Milne Associates | MA/Q303 | 6555.00 | ZAR | 13 Nov 2019 | New quote | No |

Page 1 of 1 (4 items) [1] Page size: 10

1. The **Report Viewer and Emailer** page will open.
 - The selected quote will be displayed in Report format.
2. You can **download** and/or
3. **Print** the Sales Quote, if required.

EMAIL QUOTE

4. Click on the expand [+] sign on the **Email Document** tab.



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

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

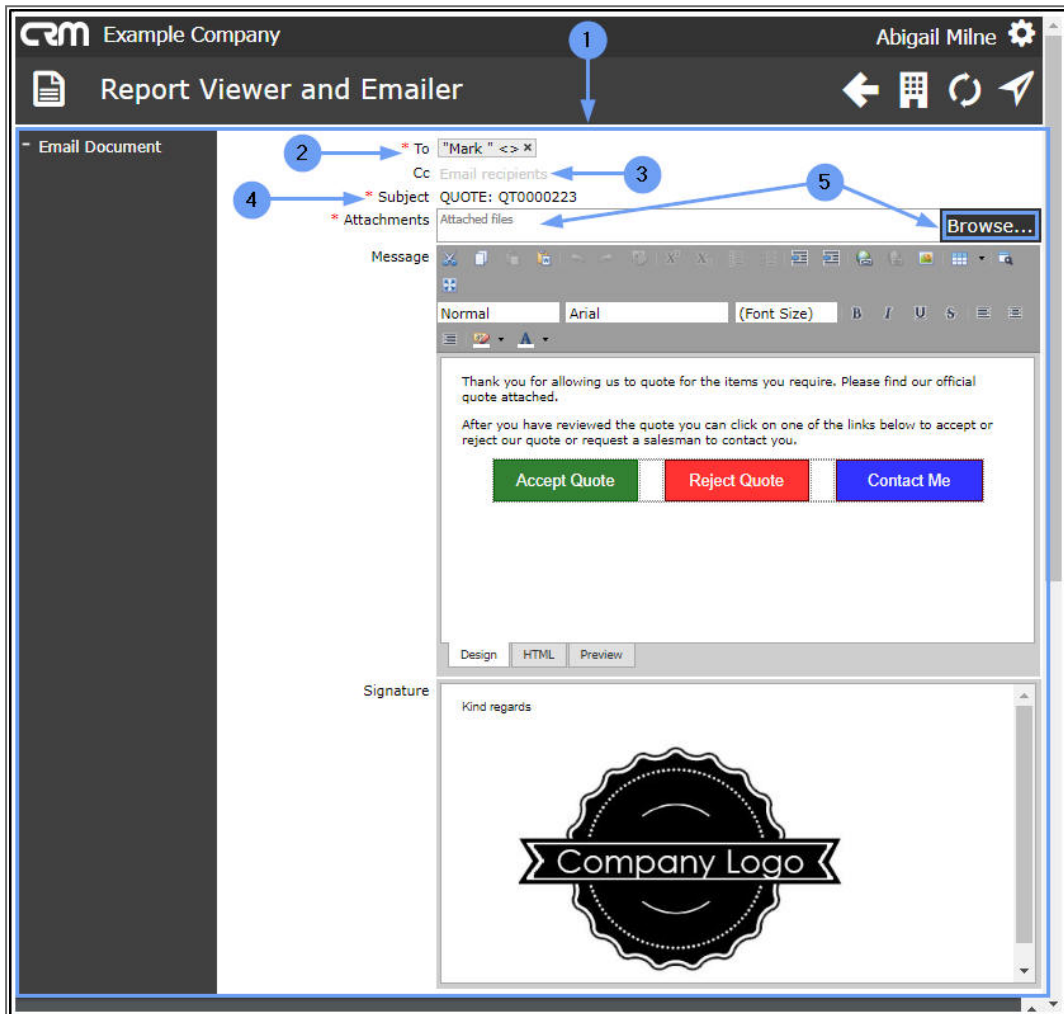
2. **To:** This will auto populate with the CRM contact for the quote (case) but you can change this, if required.
3. **Cc:** Here, you can add other email recipients, if applicable.
 - Either click in the field and select customer contacts from the list, or type in additional addresses as noted above (separated by a semi-colon and a space).

4. **Subject:** This field will auto populate with the selected quote number but you can edit this, if required.

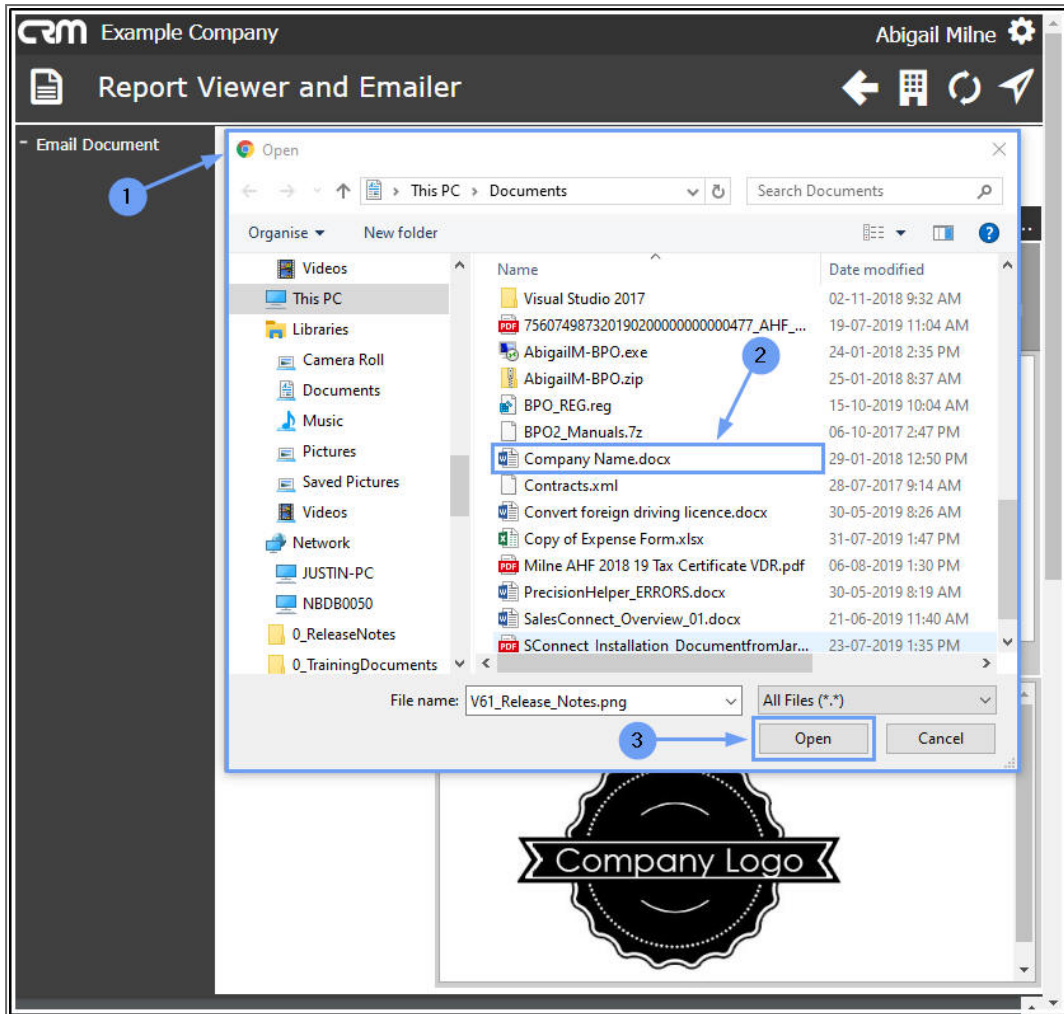
ADD AN ATTACHMENT TO THE QUOTE

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

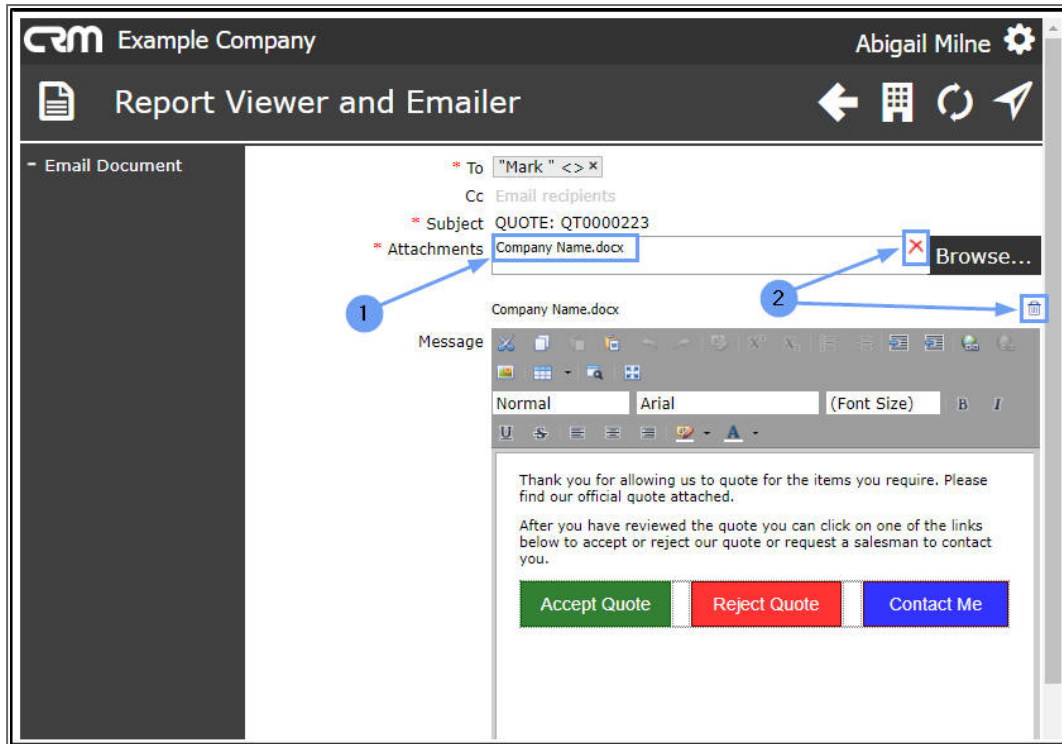
5. **Attachments:** Click on **Browse**.



1. The **Open** screen will pop up.
2. Search for and select the file you wish to link.
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. A default message will populate the **Message body** but this can be edited, if required.
 - Type in the relevant details in the message body.
2. The **Message tool bar** can be used to customise your email message.

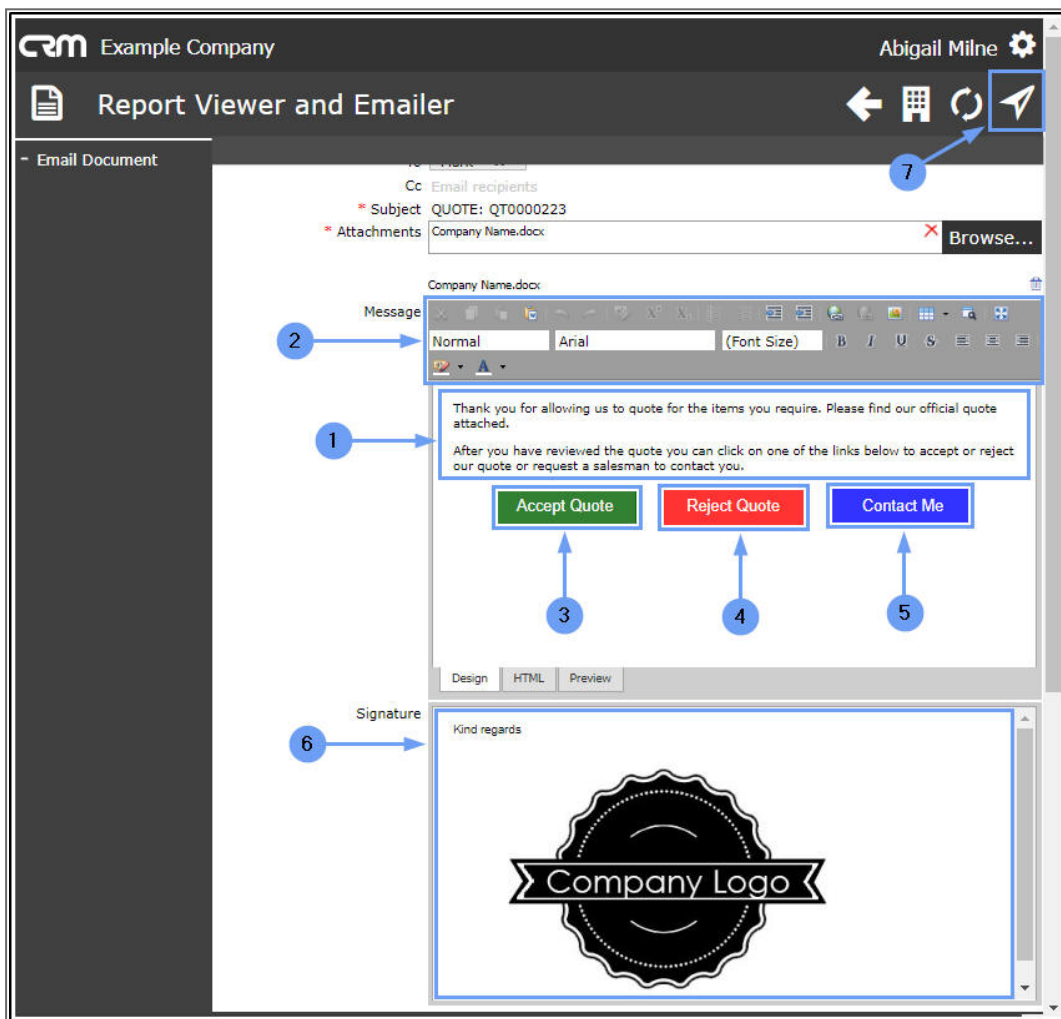
EMAIL ACTION BUTTONS

The message body contains **3Action** buttons that allow the recipient to:

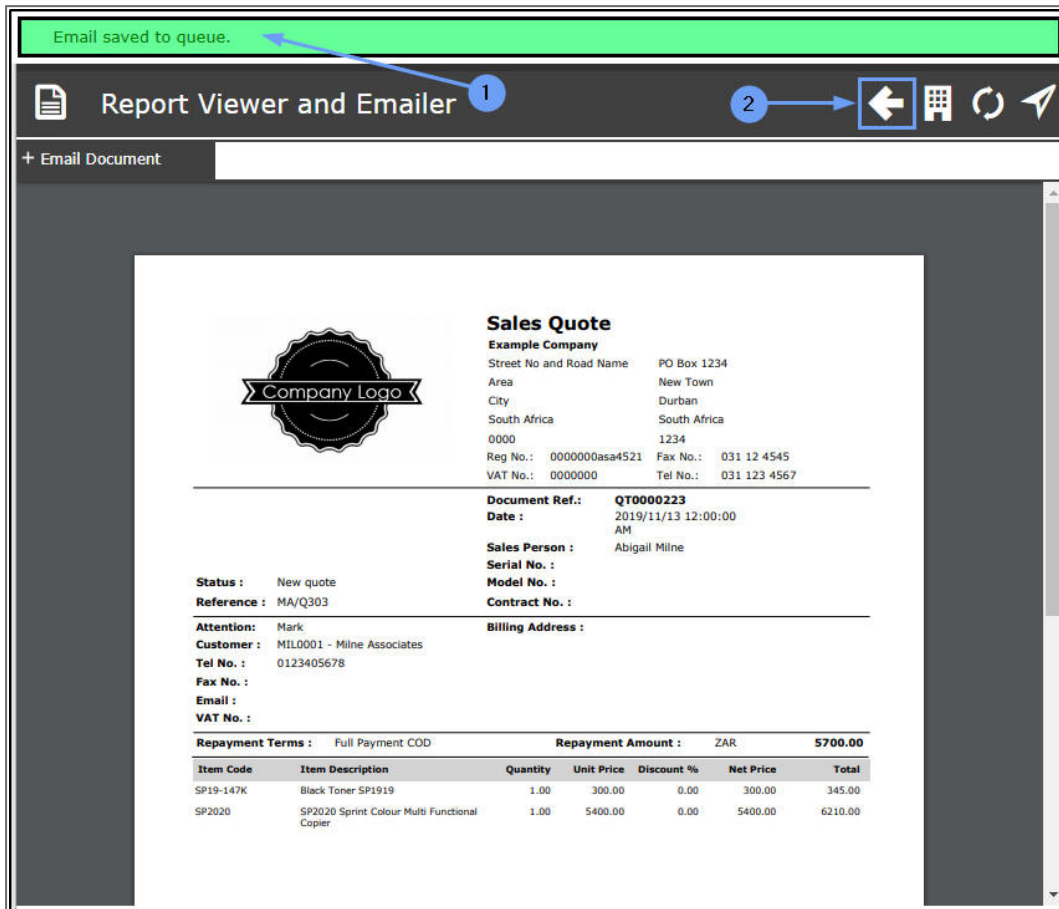
3. **Accept Quote:** If the client selects Accept - the Quote Status will be updated and a quote status notification email will be sent to the salesman (where the Quote Status Notification email flag is set to Yes). The quote will automatically be **marked as accepted** in the **Quotes / Quotes for []** screen.
4. **Reject Quote:** If the client selects Reject - the Quote Status will be updated and a quote status notification email will be sent to the

salesman (where the Quote Status Notification email flag is set to Yes). The quote will automatically be **marked as rejected** in the **Quotes / Quotes for []** screen.

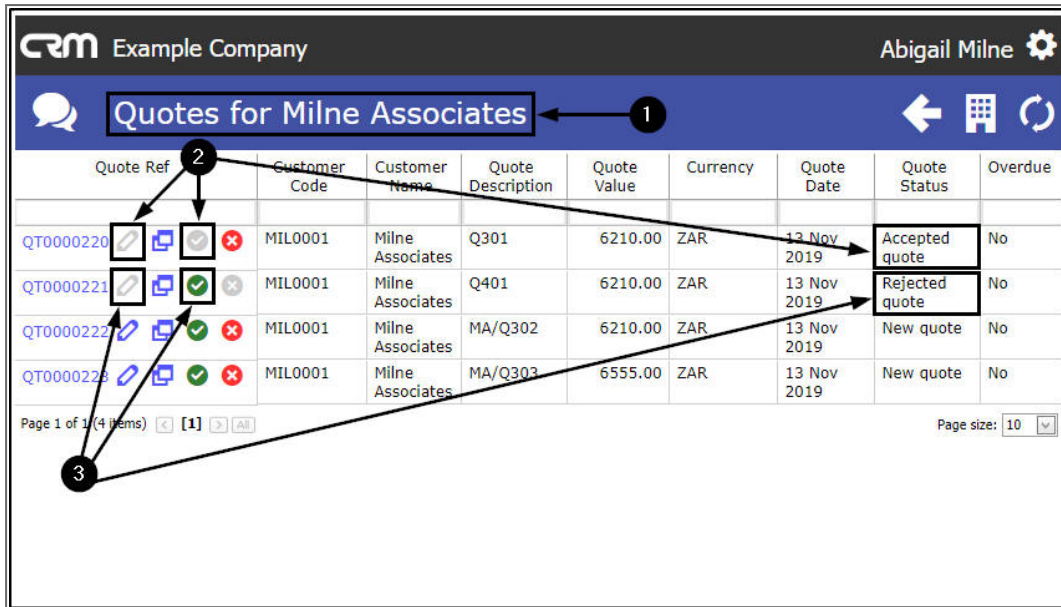
5. **Contact Me:** If the client selects to be contacted - the quote status will remain unchanged. An email will be sent to the salesman requesting that he/she follow up with the client.
6. **Signature:** If you have a **Signature configured in CRM** - your Signature will pull through here, otherwise the **Company default CRM mail signature** will pull through.
7. 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**.



1. You will return to the **Quotes for [selected customer]** listing page.
2. If, on receipt of your email, your customer selected to **Accept the Quote**, then the **Edit** icon and the **Mark as Accepted** icon will now be Inactive (greyed out) and the Quote Status will have changed to **Accepted Quote**.
3. If, on receipt of your email, your customer selected to **Reject the Quote**, then the **Edit** icon and the **Mark as Rejected** icon will now be Inactive (greyed out) and the Quote Status will have changed to **Rejected Quote**.



1. Click on **Back** to return to the previous page or
2. Click on the **Customers** icon to return to the **Customer Dashboard** or
3. Click on the **CRM logo** to return to the **Dashboard** (Home page).



CRM.015.002

