CRM BASICS

ADD A CONTACT

Each customer needs to have a **contact** , in order to:

- Call
- Send Emails
- Send Activity Notes

A customer must have a contact linked, who is set to **Receive Sales Calls**.

It is important to remember that additional contact people will need to be configured later within BPO2:

- In order for a customer to be approved within BPO, an **Accounts Contact** is required. This contact will receive invoicing.
- Each customer should have a **Primary Contact**. This person will receive notifications regarding service call status changes.
- You can also add a contact in the Save Customer page.

Access: *Webpage - http://[servername]:[portno]/BPOCRM/User.aspx*

ADD NEW CONTACT FROM THE HOMEPAGE

- Click on the ***Add new items...*** icon.
- Click on the ***Contact*** tile.

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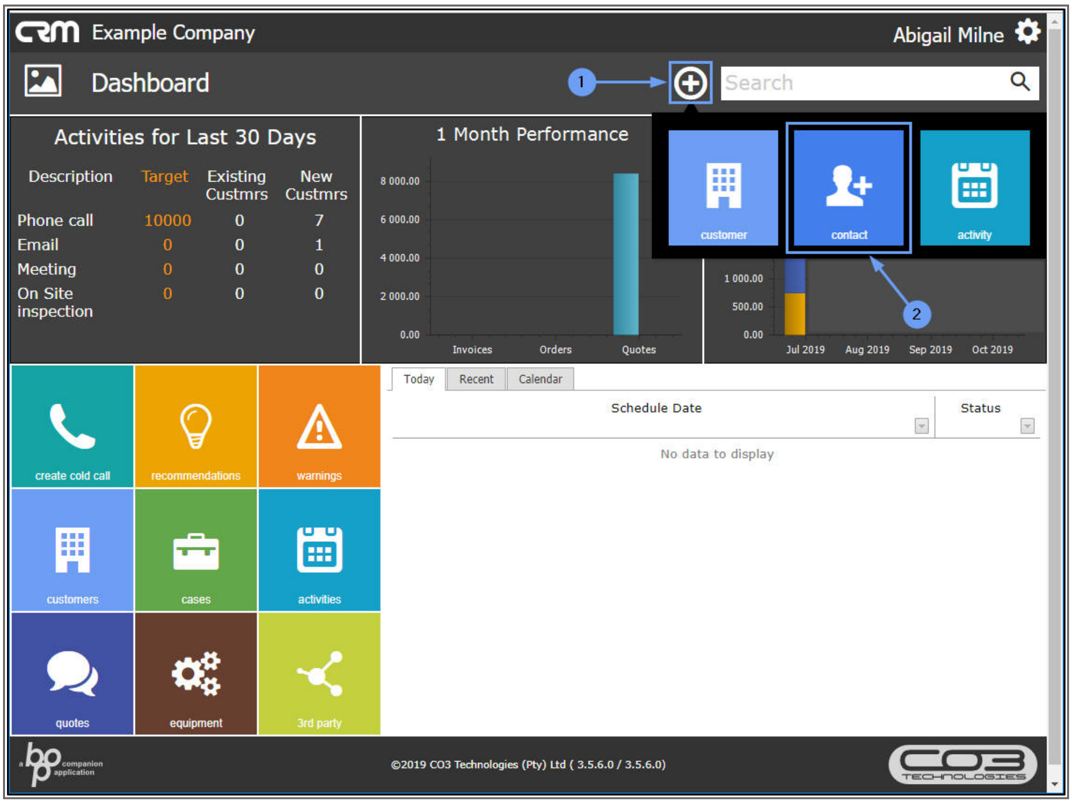

CONTACT INFO MANDATORY FIELDS

1. The ***Save Contact*** screen will open with the ***More Details*** section automatically expanded to display the ***Contact Info*** frame.
2. Click in the mandatory fields [*] and type in the contact details.

   - **Note**: that only the ***First Name*** and ***Last Name*** fields are mandatory but you can add details to all the fields in this section if you have the information on hand.

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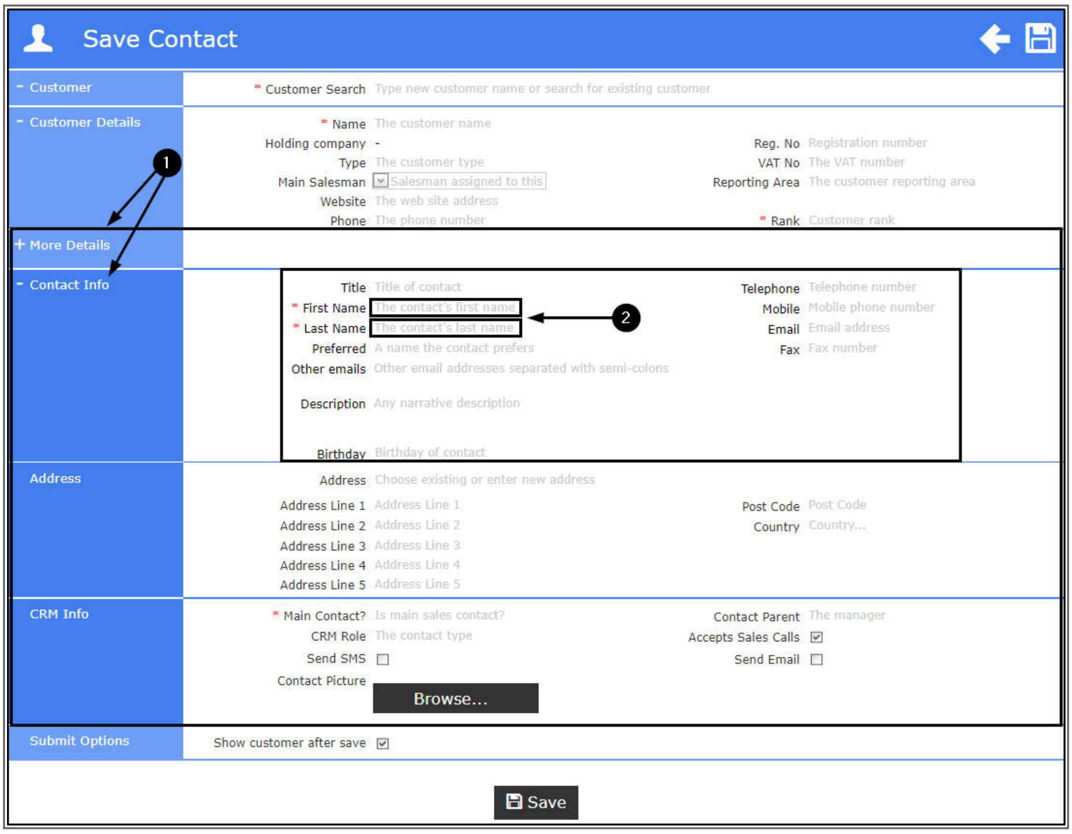

CUSTOMER SEARCH

NEW CUSTOMER

If you are adding the contact details for a ***new*** customer:

1. Go to the ***Customer*** frame, click in the ***Customer Search*** field and type in the new customer name.
2. Go to the ***Customer Details*** frame. As you click anywhere in this frame, the ***Name*** field will auto populate with the same text that was typed into the ***Customer Search*** field.
3. Click in the ***Rank*** field and select from the drop-down list the Rank ***Call Cycle*** for this new customer (e.g. ***Platinum*** Rank = the call cycle for this customer is every **15** days).

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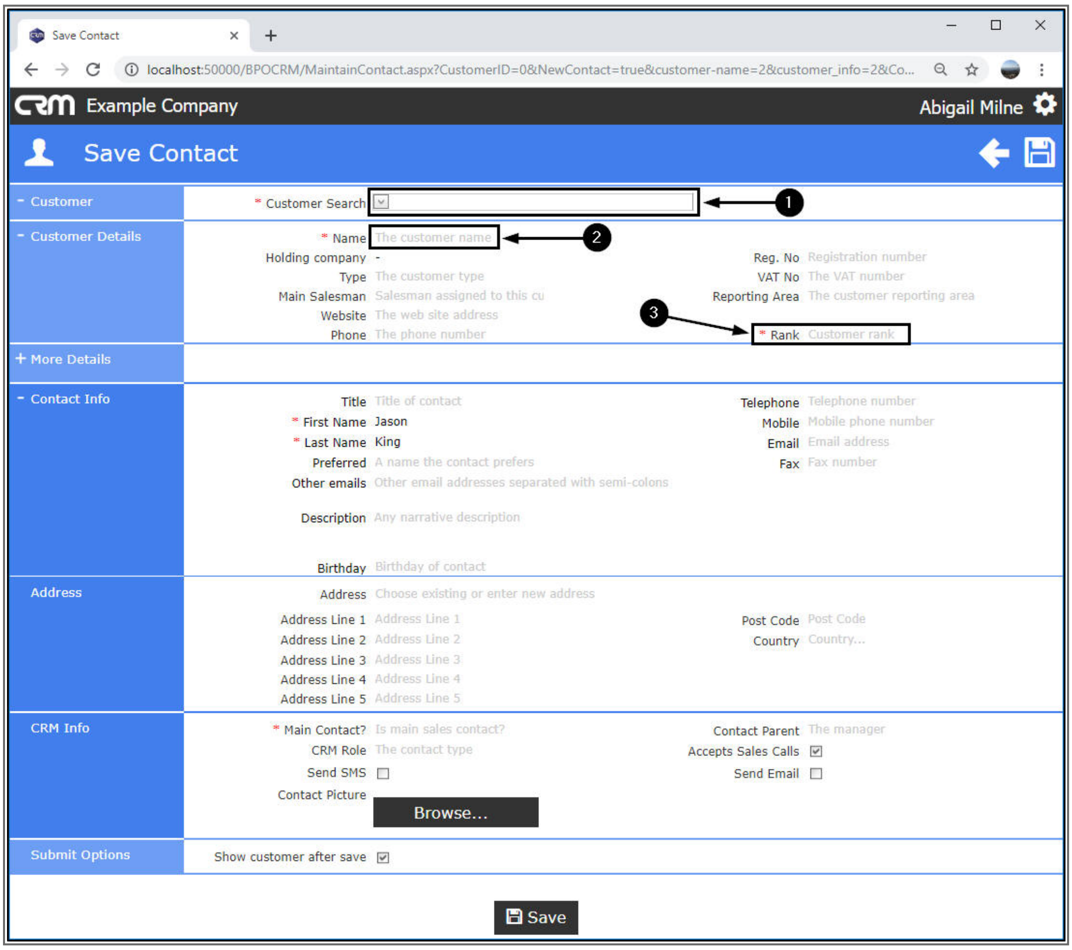
Rank is based on how much you ***value*** this customer and helps to define the call cycle per client. For example, a ***Wood*** ranking indicates that you will only contact this customer every **365** days - this customer is not valuable to you. However a ***Platinum*** ranking indicates that this is a very important customer that you wish to maintain a good relationship with, therefore you will contact them every **15** days.

Each customer must be linked to a Rank in CRM. Customer Rank can also be linked in the Customer Maintenance screen in BPO2.

The above mentioned fields are mandatory [*] but you can add details to all the fields in these frames if you have the information on hand.



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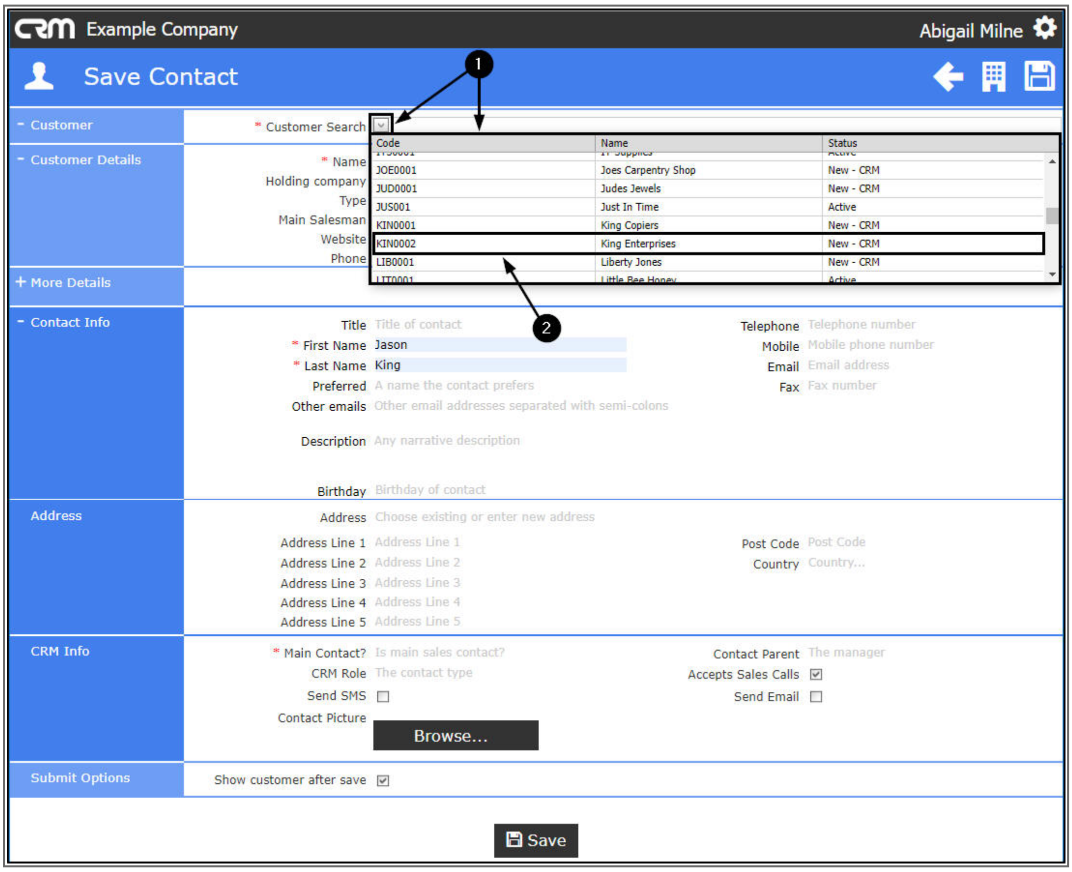
CURRENT CUSTOMER

If you are adding the contact details for a ***current*** customer:

1. Hover over the ***Customer Search*** field, a drop-down arrow will be revealed. Click on this arrow to display a list of all the customers on the system.
2. Select the relevant customer to be linked to the new contact.



SELECT AN ADDRESS

If this is a current customer already loaded into CRM, you can select an ***address***.

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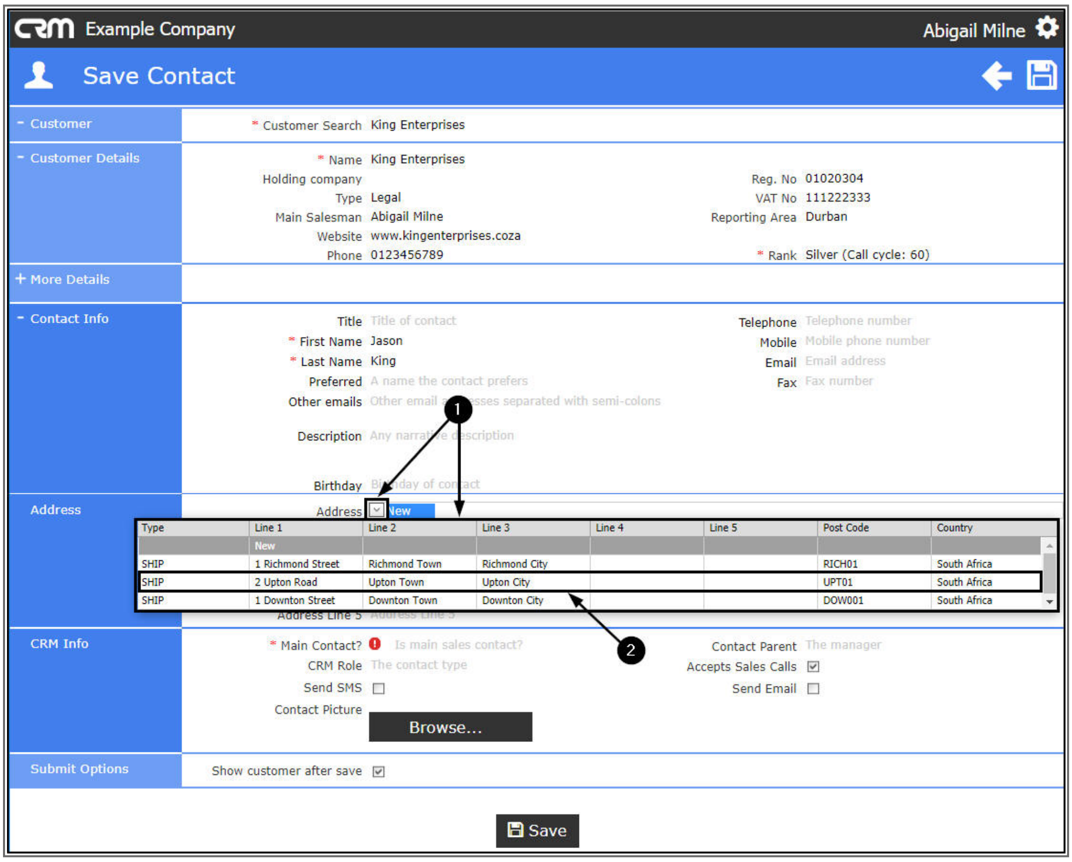
1. Hover over the ***Address*** field, a drop-down arrow will be revealed. Click on this arrow to display a list of all the shipping addresses linked to this customer.
2. Select the relevant address to be linked to the new contact.



CREATE A NEW ADDRESS

If the new contact address is not on this list:

1. As you click in the ***Address*** field ensure that you select ***New***.

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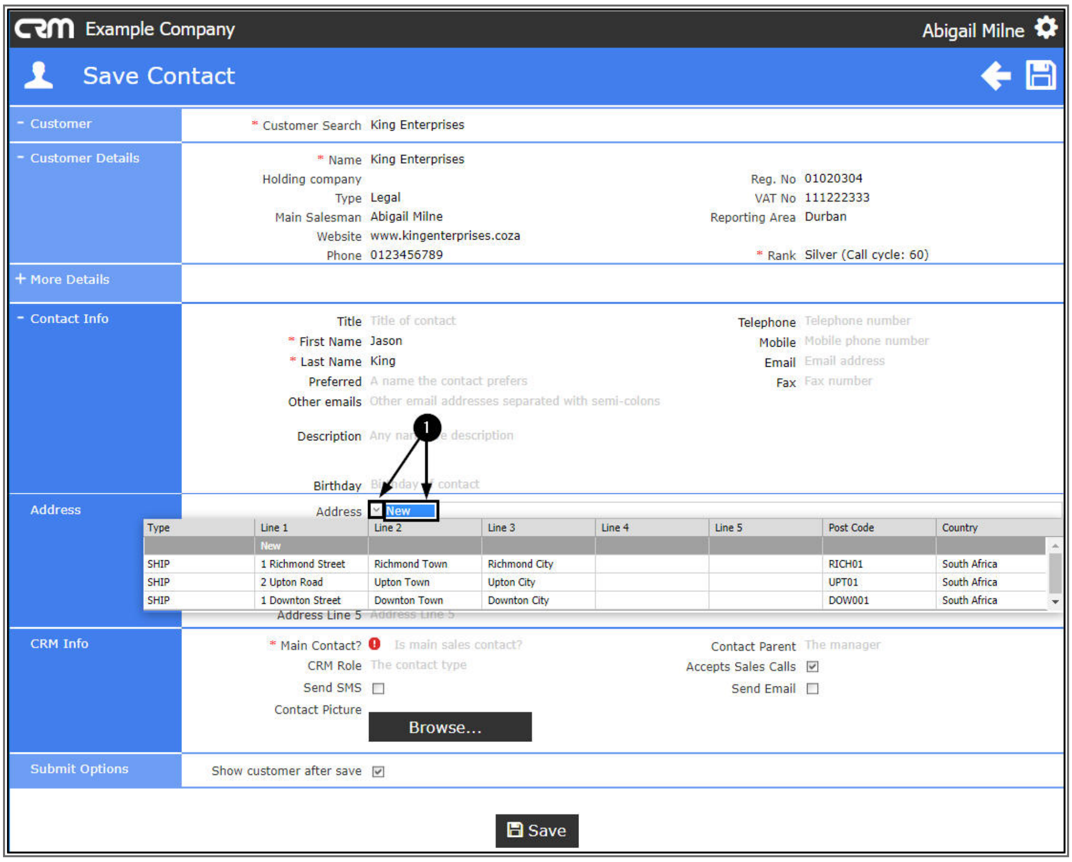

1. With ***New*** selected,
2. You can now type in the new address in all the relevant fields

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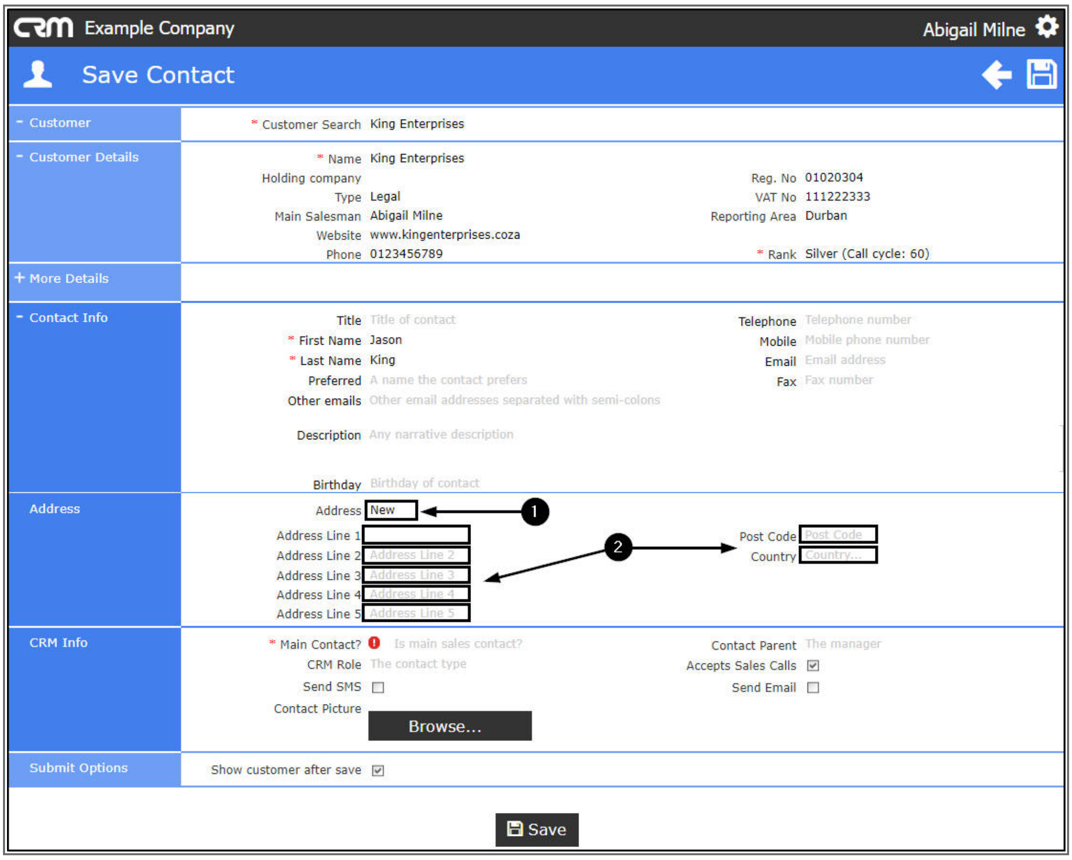

THE 'CRM INFO' FRAME.

Move down the page to the ***CRM Info*** frame.

MAIN CONTACT

1. Hover over the ***Main Contact*** field to reveal a drop-down arrow. Click on this arrow to display a drop-down list with the options: ***Yes*** and ***No***.
2. In this example, ***Yes*** is selected.

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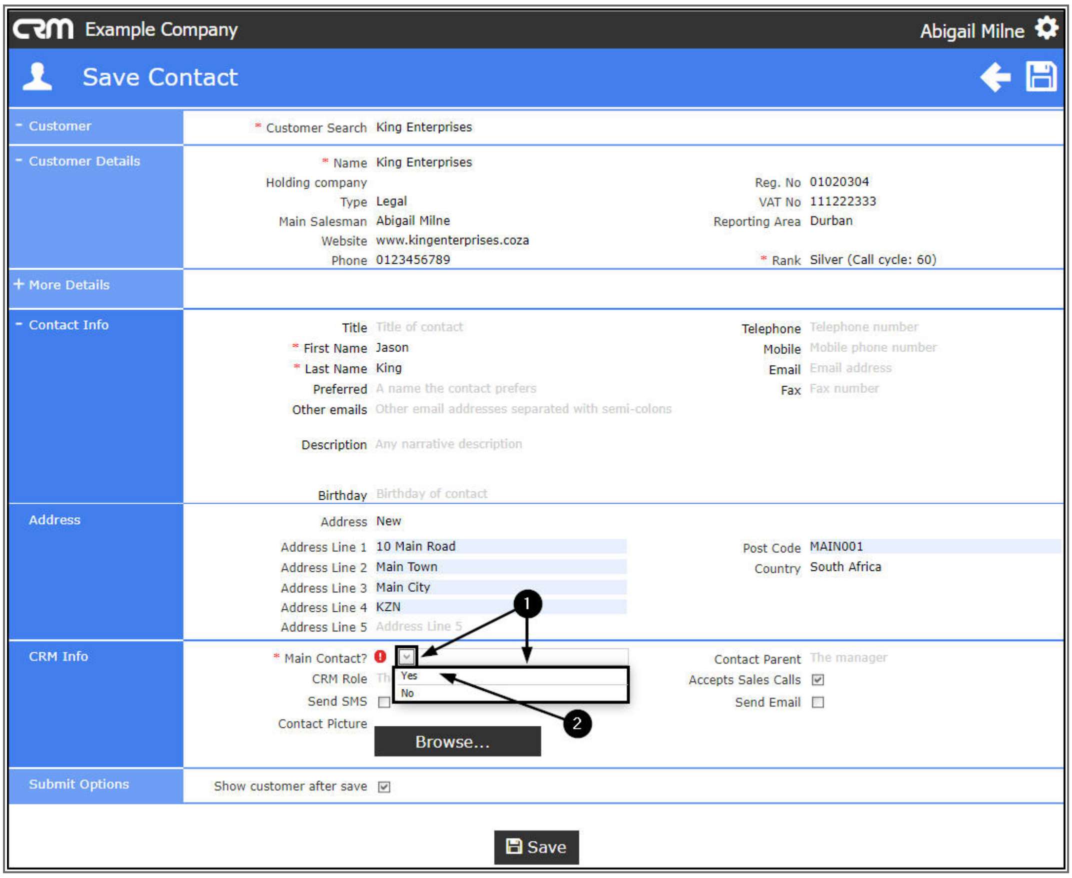

CRM ROLE

1. Hover over the ***CRM Role*** field to reveal a drop-down arrow. Click on this arrow to display a ***Contact Type/Role*** list.
2. Select from this list the specific role that this contact holds in their company. In this example, ***Buying Officer*** is selected.

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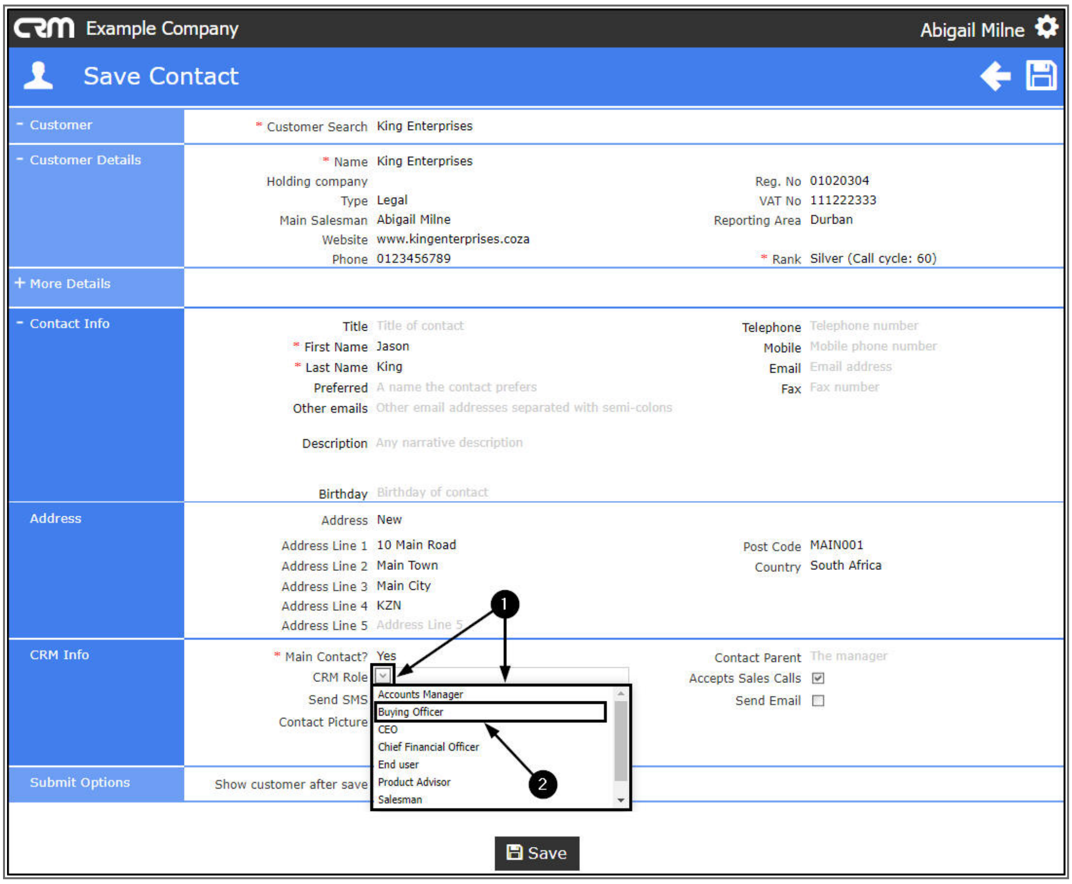

1. **Send SMS** : Select this check box if this contact accepts SMS communication.
2. **Accept Sales Calls** : Select this check box if this contact accepts sales calls.
    - **Note** : This check box is auto selected by the system, you can un-check it, if required.
3. **Send Email** : Select this check box if this contact accepts Email communication.

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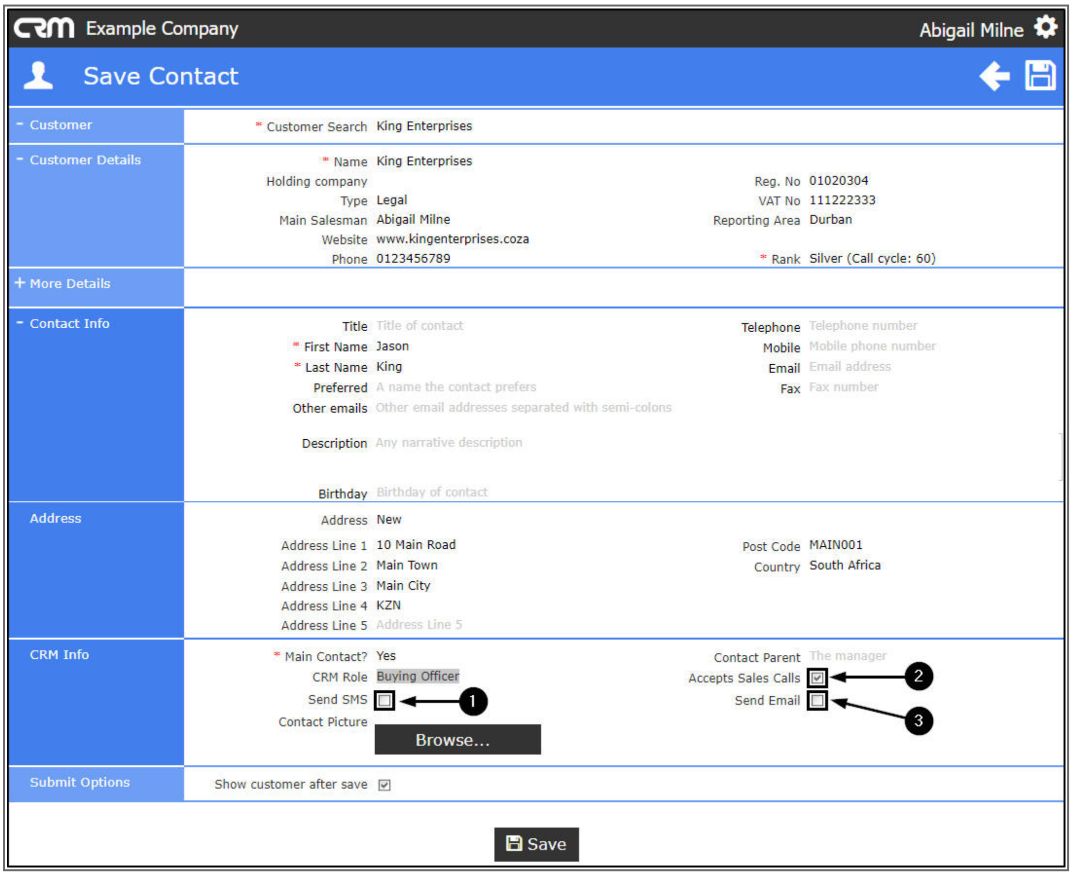

LINK A CONTACT PICTURE

1. Click on ***Browse...***
2. An ***Open*** screen will pop up.
3. Double click on the file that contains the image.
4. Click on the image.
5. Click on ***Open***.

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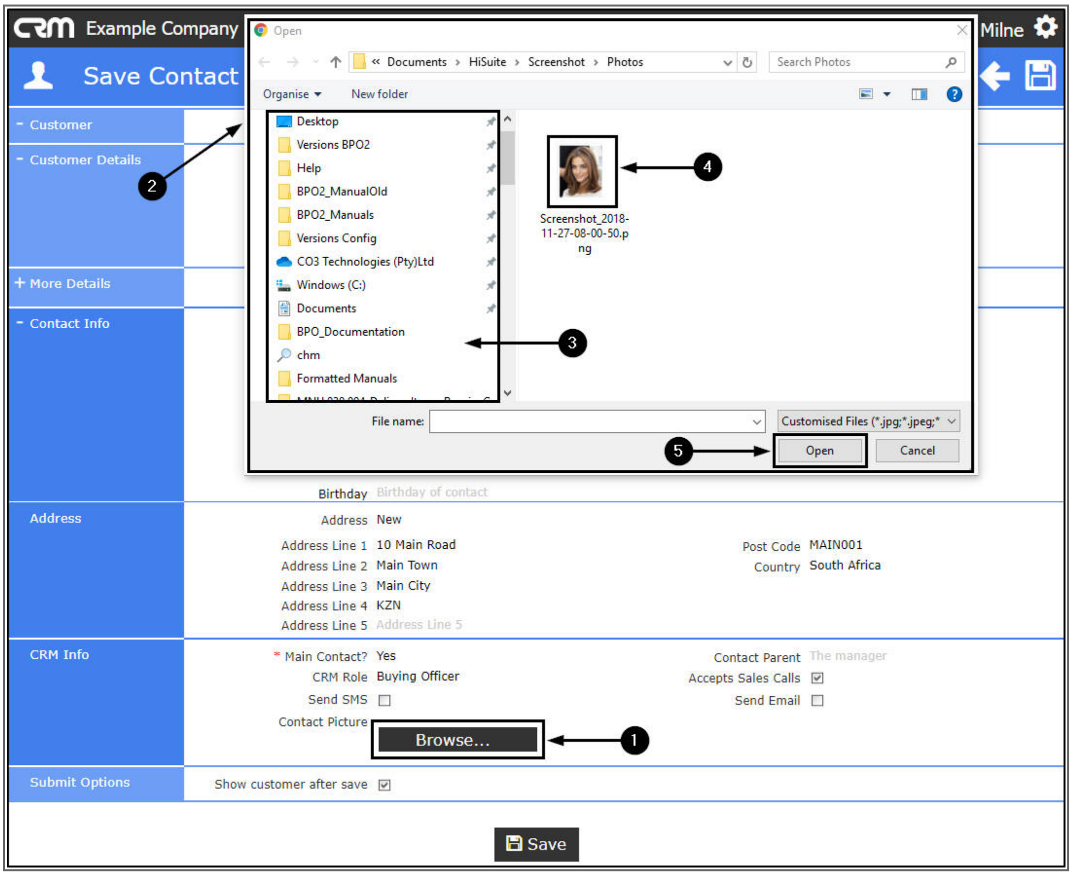

1. The contact picture will be inserted into this ***CRM Info*** frame

CONTACT PARENT

2. Click in this field and type in the ***'report to'*** person for this contact e.g. the Buying Manager
   - **Note**: If there are Contact Parents set up against this customer, a drop-down arrow will appear as you hover over this field. Click on this arrow to display a list of contact parents from which you can make a selection.

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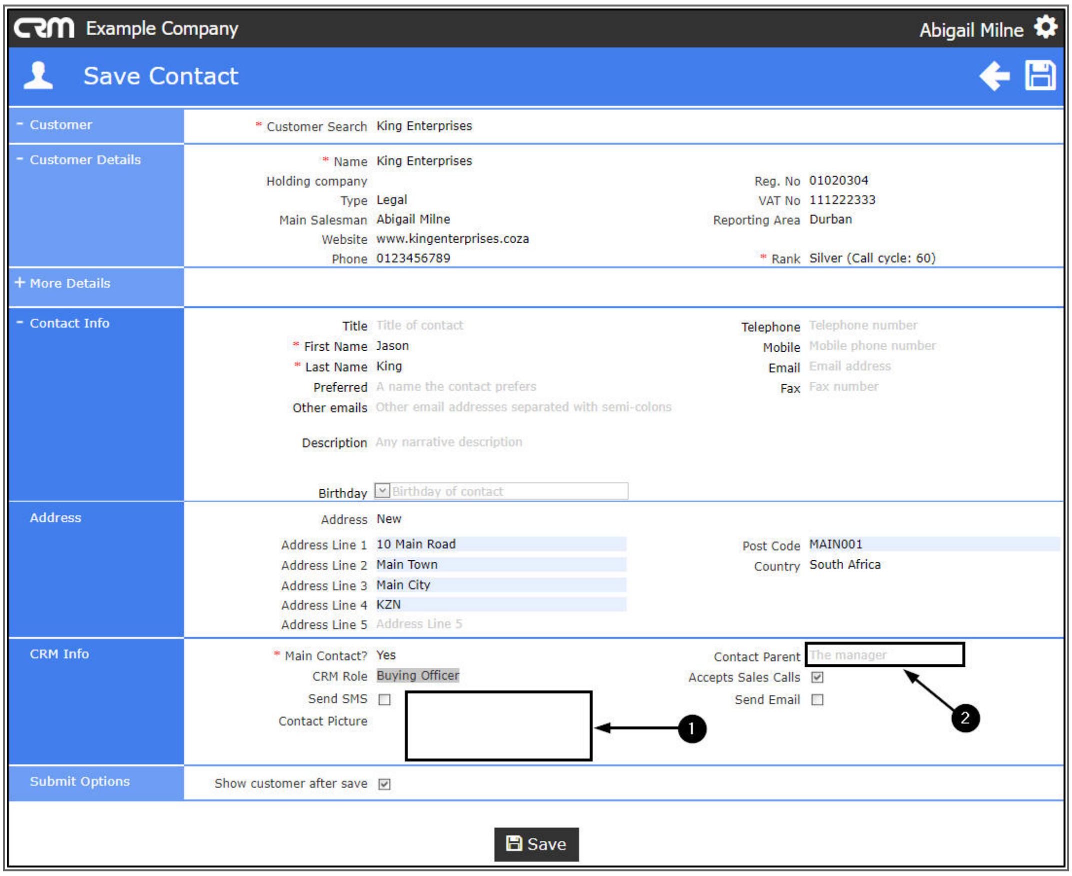

SUBMIT OPTIONS

SHOW CUSTOMER AFTER SAVE

1. This check box is auto selected. You can un-select it if you do not wish to view the customer details in the Homepage after you have saved this contact.

SAVE NEW CONTACT

2. Click on ***Save***.

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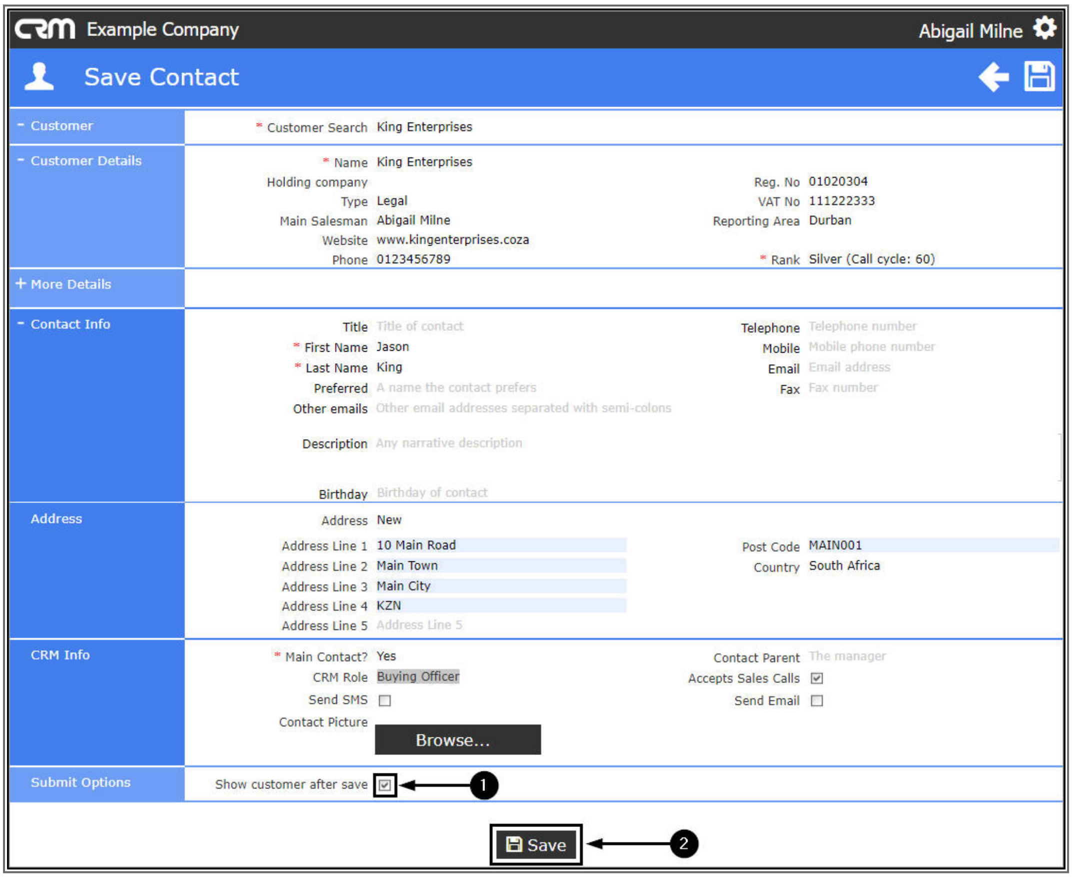

1. You will either return to the Homepage or Customer Homepage depending on your selection in the previous step.
2. If you selected to 'Show Customer After Save', then you will now be able to view the customer details (e.g. 12 Months Sales History) in this screen as well as customer-specific tiles that are not available in the Main Homepage.

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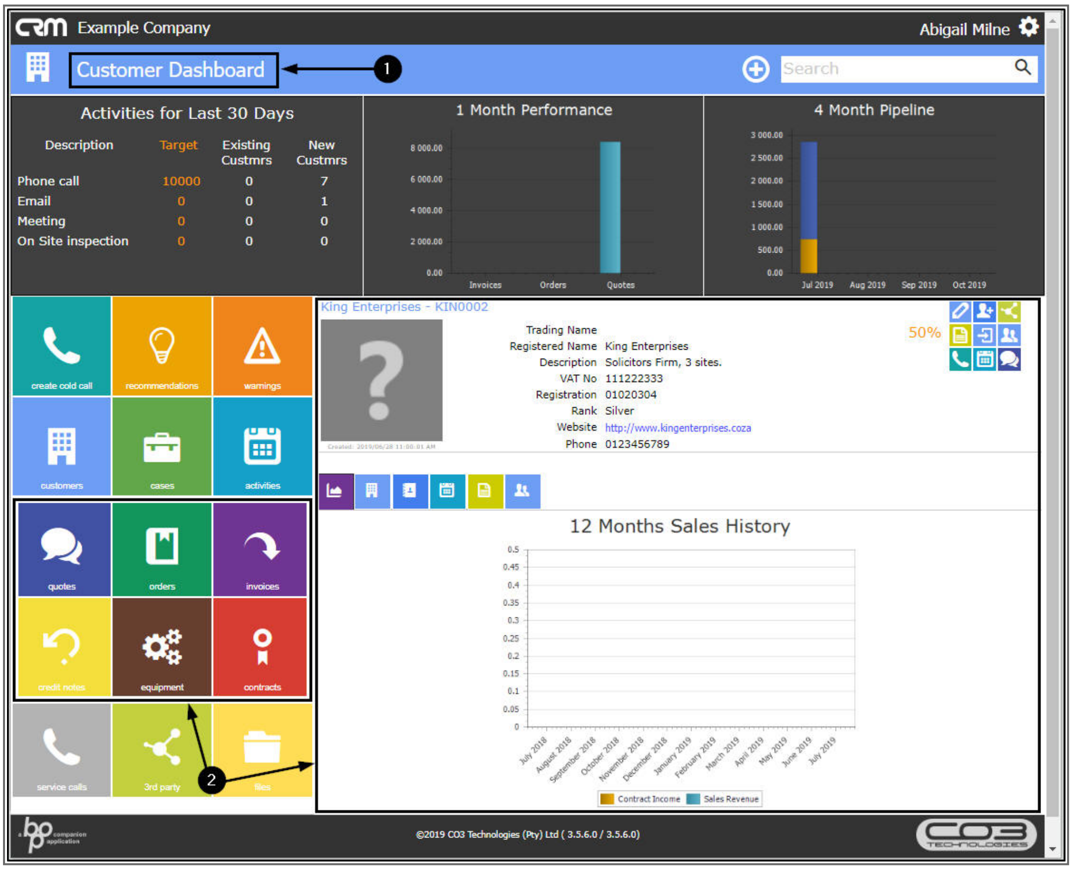

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