CRM BASICS

ACTION BUTTONS AND INFORMATION TILES

The customers that you can view in CRM will be:

- the customers where you are the **main salesperson** or
- the customers where you are **linked** as a salesperson.

This list may include current BPO customers or New - CRM customers.

In the **Customers** listing page you can view and access the following customer **Actions buttons**:

- Edit Customer
- Add Contact
- Add Third Party
- Add Note
- Maintain Customer Salesmen
- New Activity
- New Quote
- Release Customer (New CRM Customers only)

In the **Customer Dashboard** (Customer Home page) you can view and access all the **Actions buttons** as listed above as well as the:

- Create Cold Call for Customer

You can also access the following customer **Information tiles**:

- Sales
- Addresses
- Contacts
- Open Activities

- Notes
- Salesmen

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

VIEW CUSTOMER LIST

1. In the ***Homepage***,
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.

1. The ***Customers*** listing page will open.
   - Here you can view all the customers where you are either the ***main*** salesperson or ***linked*** as a salesperson.

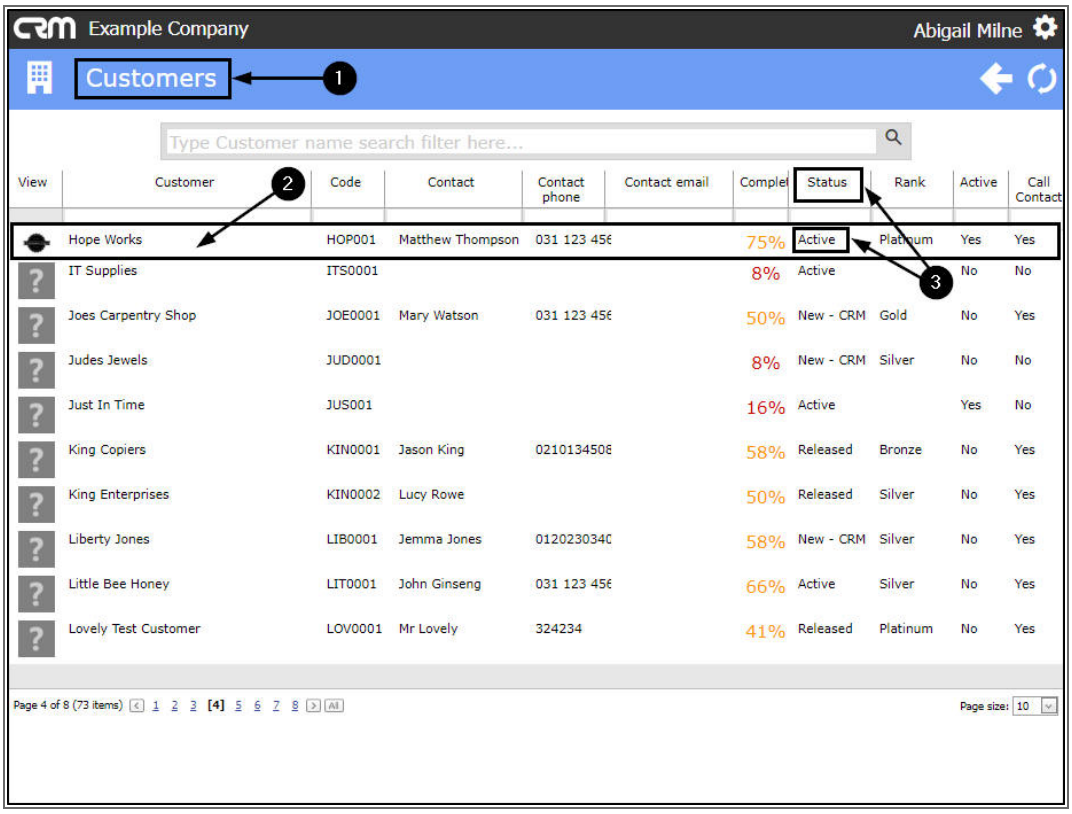
CUSTOMER ACTION BUTTONS

2. ***Hover over*** a selected customer.
    - In this example, ***Hope Works*** has been selected.

ACTIVE OR RELEASED

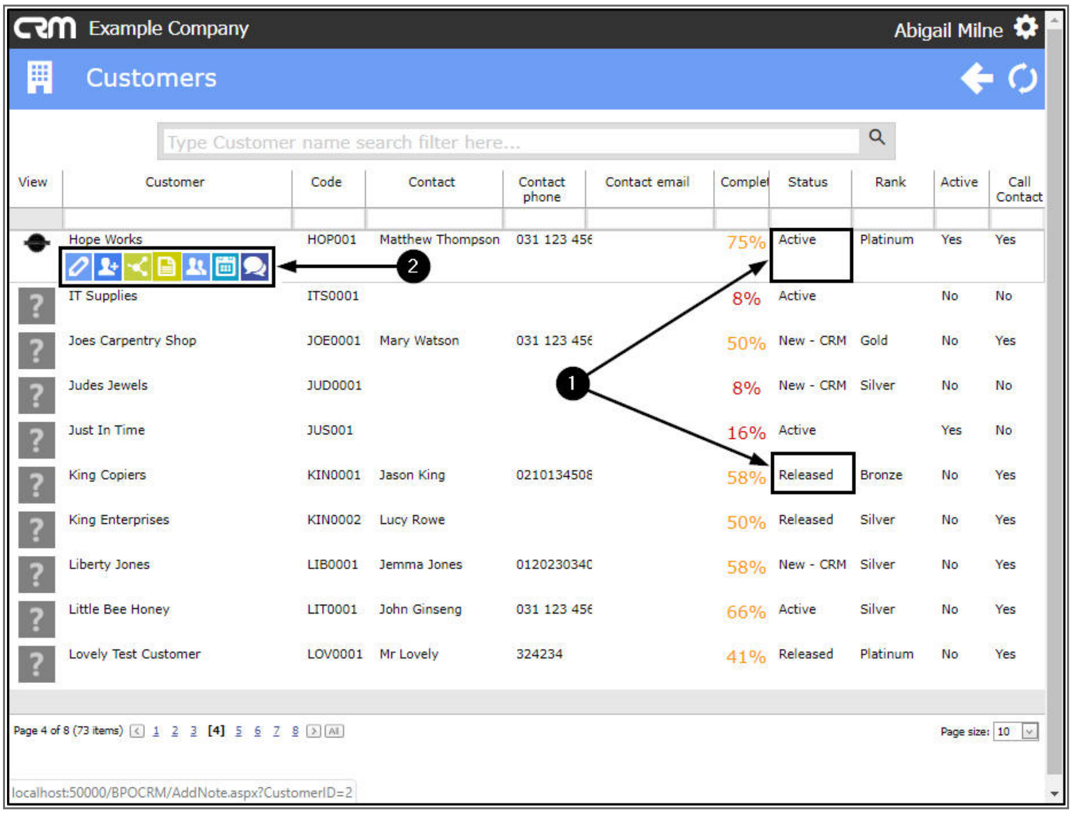
Note on Customer Status **Active** or **Released**

3. You will note that the ***status*** of this customer is ***Active***. The Actions buttons that are available (shown in the next image) will depend on the ***status*** of the selected customer.



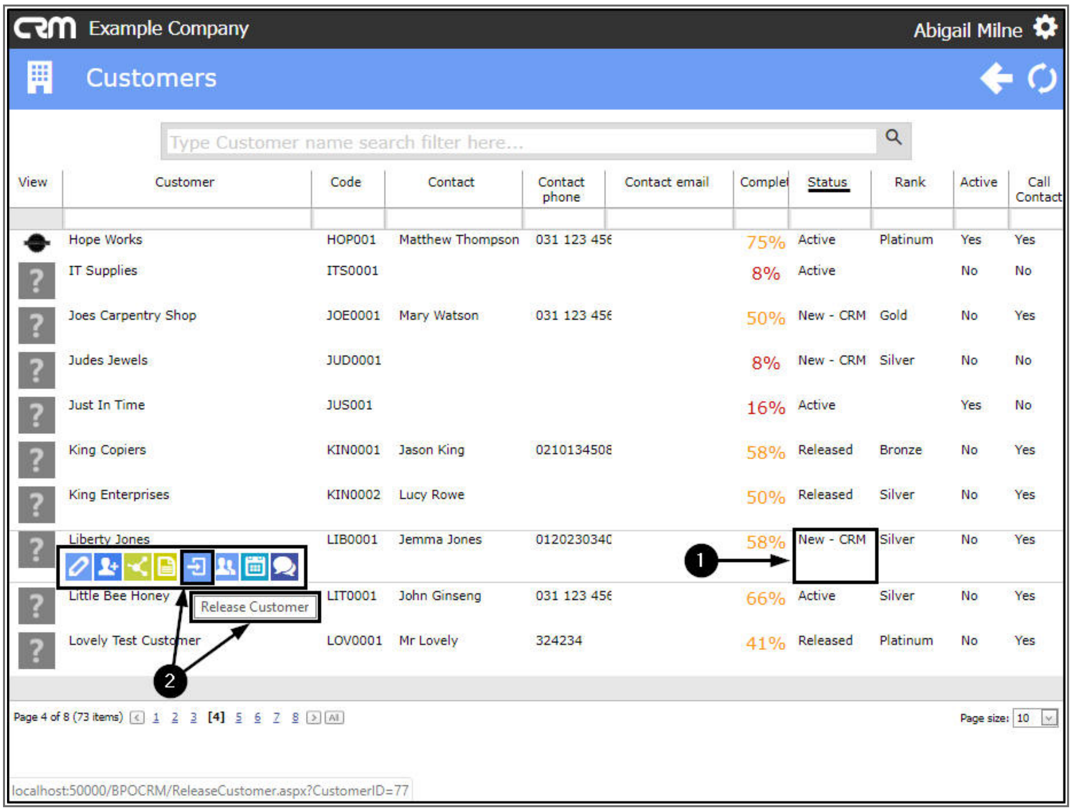
1. As you hover over an ***Active*** or ***Released*** customer,
2. the following ***Actions buttons*** will be displayed:

- Edit Customer
- Add Contact
- Add Third Party
- Add Note
- Maintain Customer Salesmen
- New Activity
- New Quote



NEW - CRM

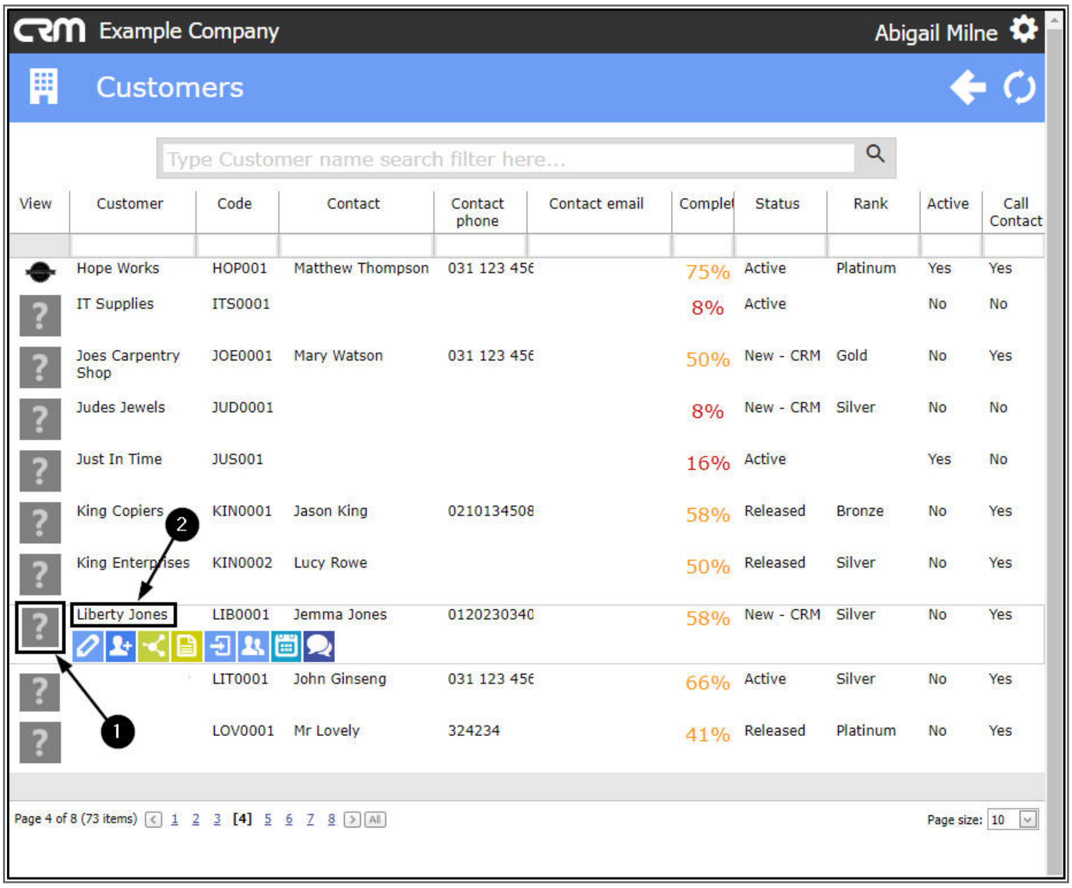
1. If you selected a customer that is in status ***New - CRM*** then you will note an additional Action button:
2. Release Customer (for approval in BPO)



CUSTOMER HOME PAGE

To view both the customer ***Actions buttons*** and the customer ***Information tiles*** in the same screen - you will need to navigate to the ***Customer Dashboard***.

1. In the ***Customers*** listing page, click on the selected customer icon in the ***View*** column.
2. In this example, ***Liberty Jones*** has been selected.



1. The selected ***Customer Dashboard*** will open.

CUSTOMER INFORMATION TILES

2. The customer ***Information tiles*** are displayed directly on this page:
    - Sales
    - Addresses
    - Contacts
    - Open Activities
    - Notes
    - Salesmen

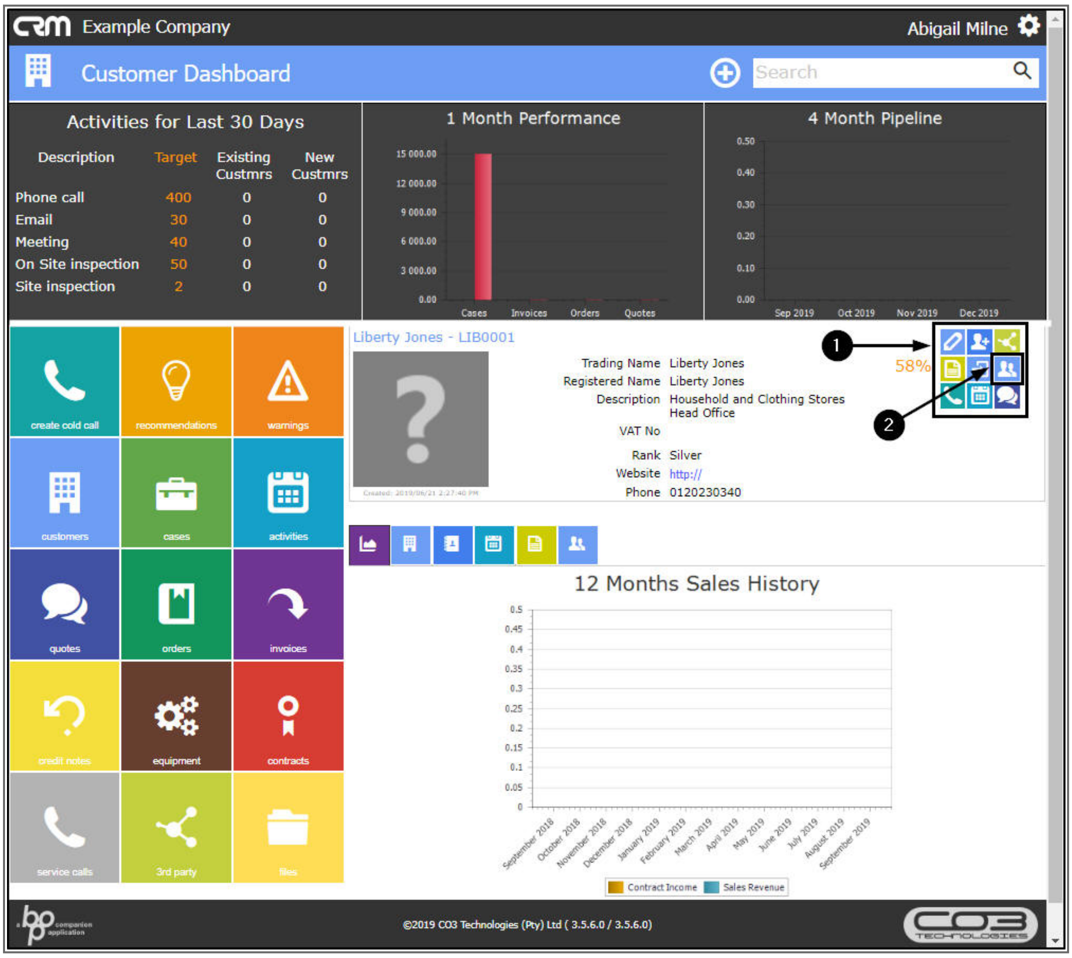
CUSTOMER ACTION BUTTONS

3. To view the customer ***Action*** buttons hover anywhere in the customer information frame.

1. The customer ***Actions Buttons*** will then be displayed:
    - Edit Customer
    - Add Contact
    - Add Third Party
    - Add Note

- Maintain Customer Salesmen
- Create Cold Call for Customer (this button is only available from the Customer Home page)
- New Activity
- New Quote
- Release Customer (this button is only available for New - CRM customers)

2. Click on any of these buttons to direct you to the relevant ***Action page***.



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