

CRM BASICS

CUSTOMER RANKS

Rank is based on how much you *value* a 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.

Ranks are customisable, you can set them up according to your own company requirements.

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

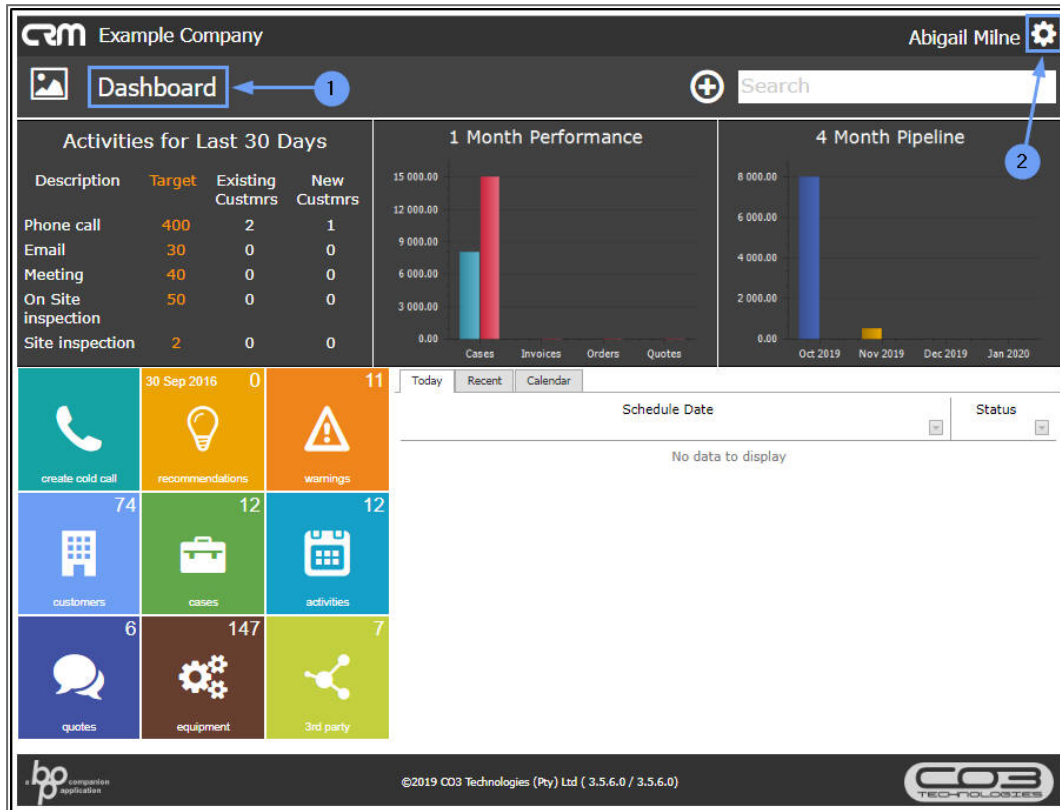
Customer Ranks Overview:

- Customer Ranks help to define the call cycle per client.
- There must be at least one Rank configured and all Customers should be linked to a Rank.
- If 'Customer Rank Call Recommendation' configuration option is set to CanProcess = 'Yes', then the BPOCRM_RecommendationEngine will generate a Recommendation to create a new Activity for this customer using the assigned Customer Rank.

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

VIEW CUSTOMER RANK

1. In the *Homepage*,
2. Click on the *Settings* icon.



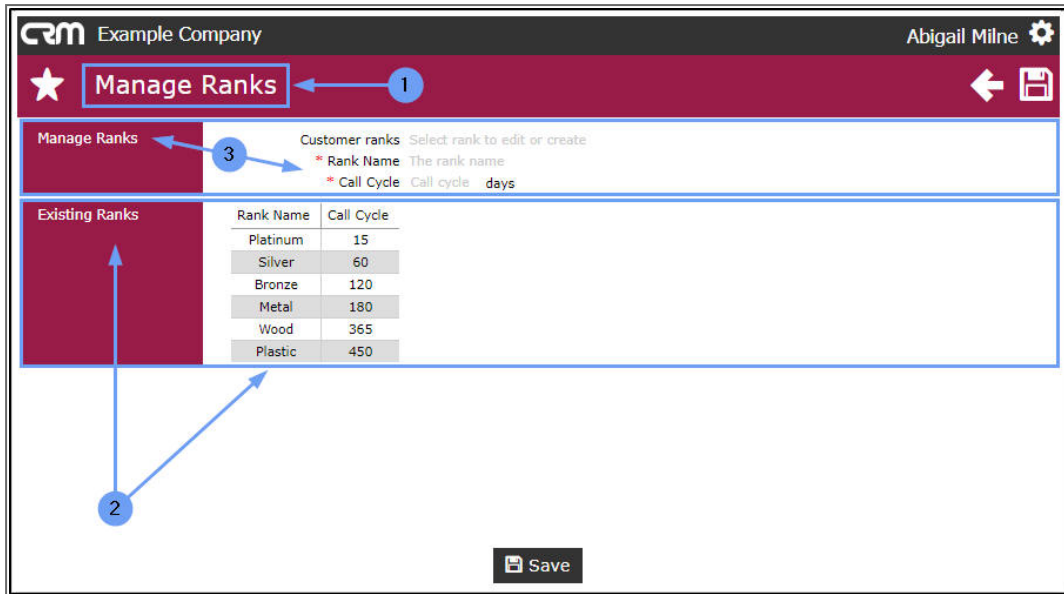
1. The *Settings* panel will be expanded.
2. Click on the *Customer Ranks* tile.



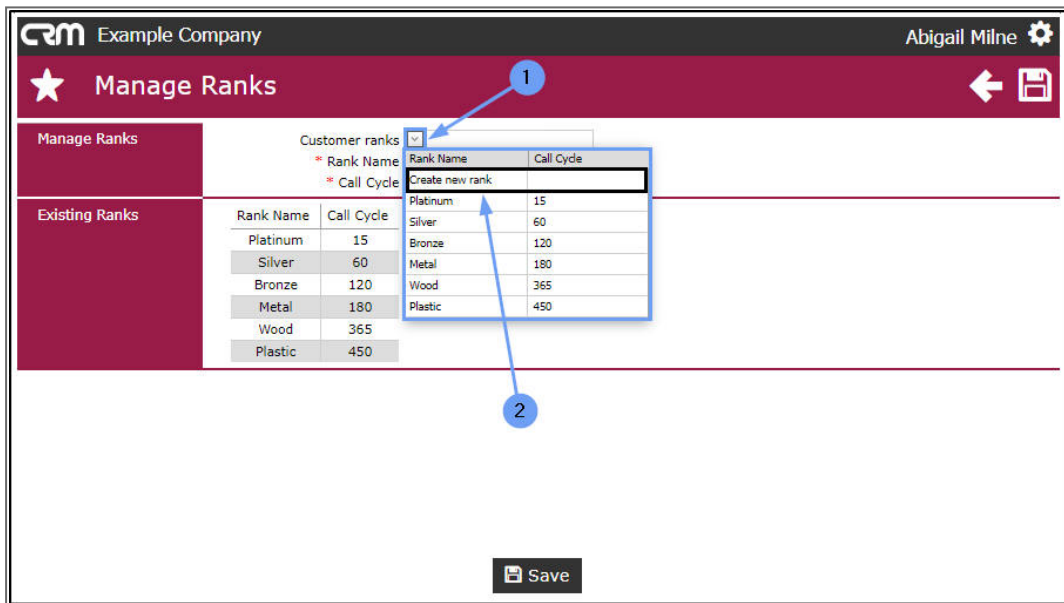
1. The **Manage Ranks** page will open.
2. Here you can view the **Existing Ranks** - (ranks already added to the system). In this example there are **6** ranks set up:
 - i. **Platinum**
 - ii. **Silver**
 - iii. **Bronze**
 - iv. **Metal**
 - v. **Wood**
 - vi. **Plastic**

ADD NEW CUSTOMER RANK

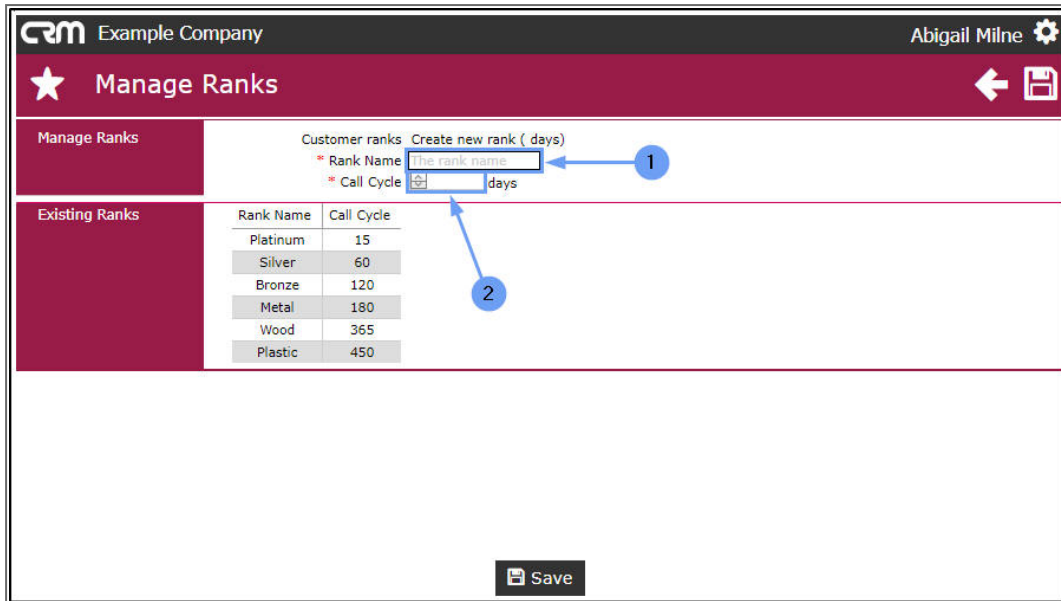
3. Use the fields in the Manage Ranks frame to add a new customer rank.



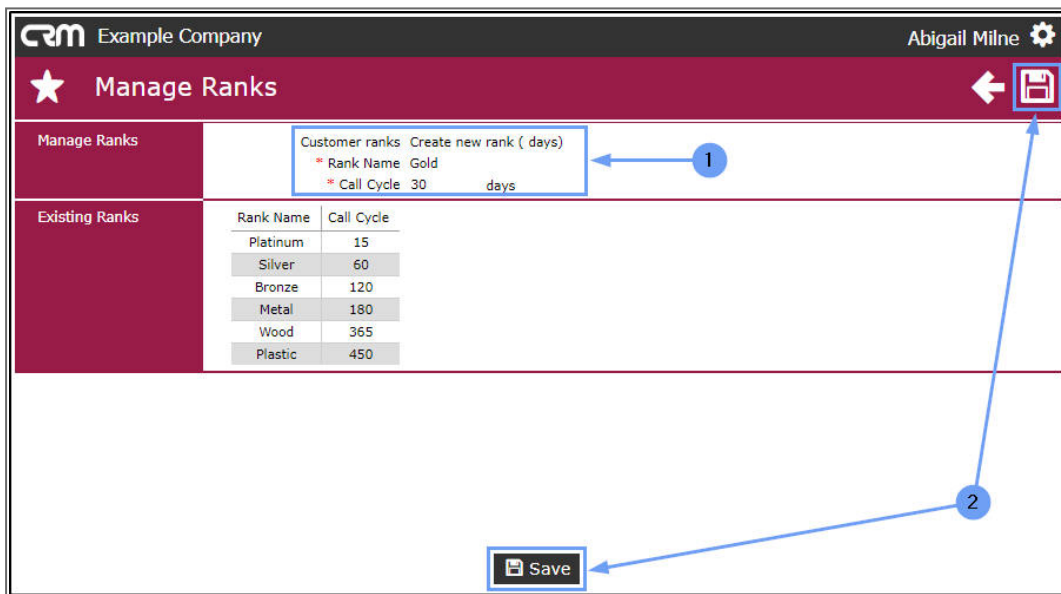
1. Click on the drop-down **arrow** in the **Customer ranks** field.
2. Select **Create new rank** from the drop-down list.



1. **Rank Name:** Type the name of the new rank in this text box
2. **Call Cycle:** Either type in or use the directional arrows to select the Call Cycle amount (in days).

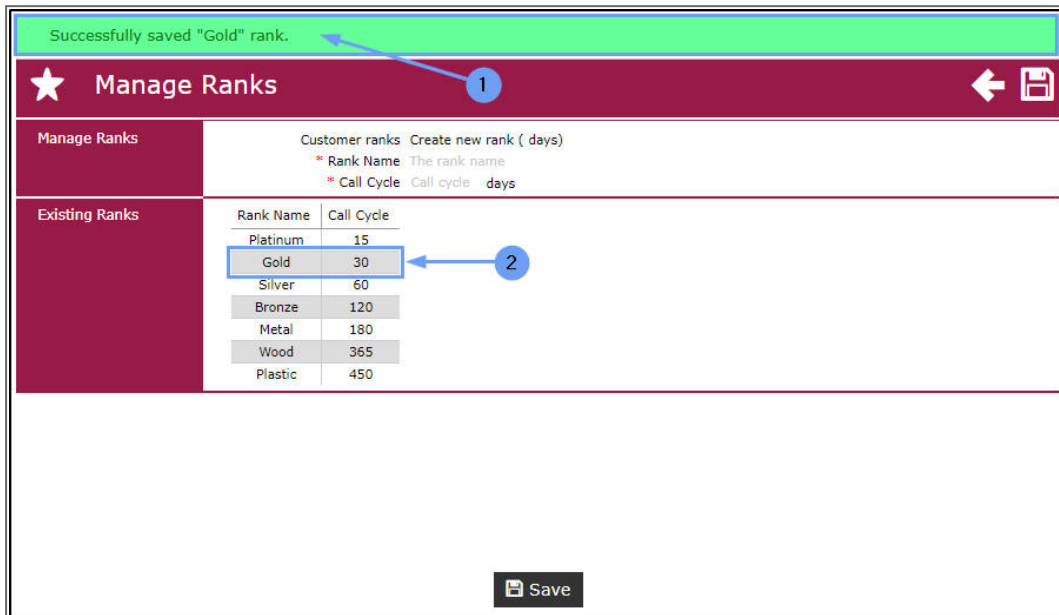


1. When you have finished adding the new rank details,
2. Click on **Save**.



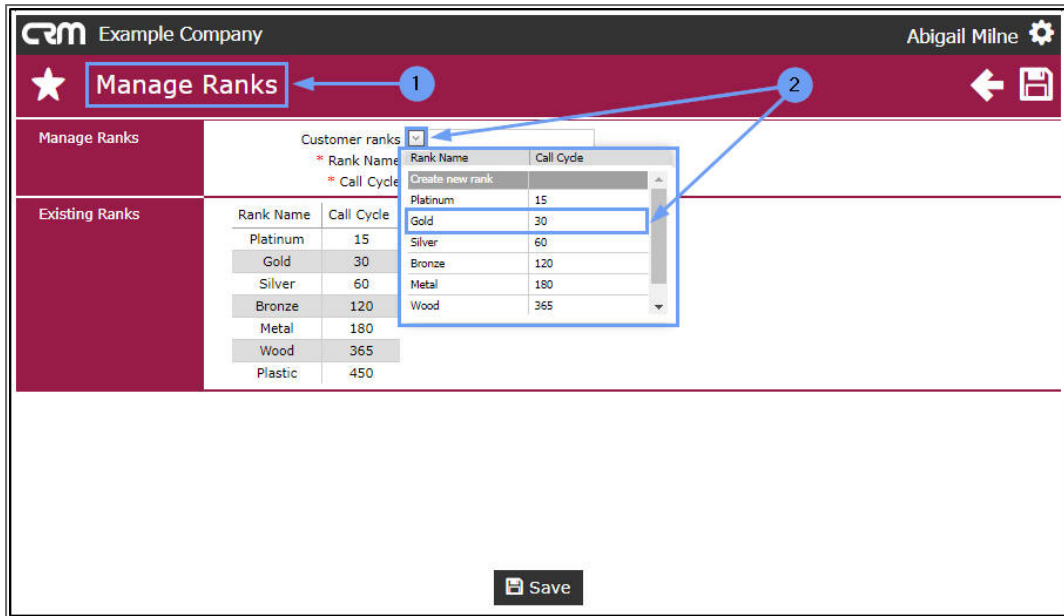
1. The screen will refresh and a **message bar** will appear at the top of the screen;

- **Successfully saved [new rank name] rank.** (Click on this message bar to acknowledge and remove it.)
2. The new rank details will now be listed in the **Existing Ranks** frame.

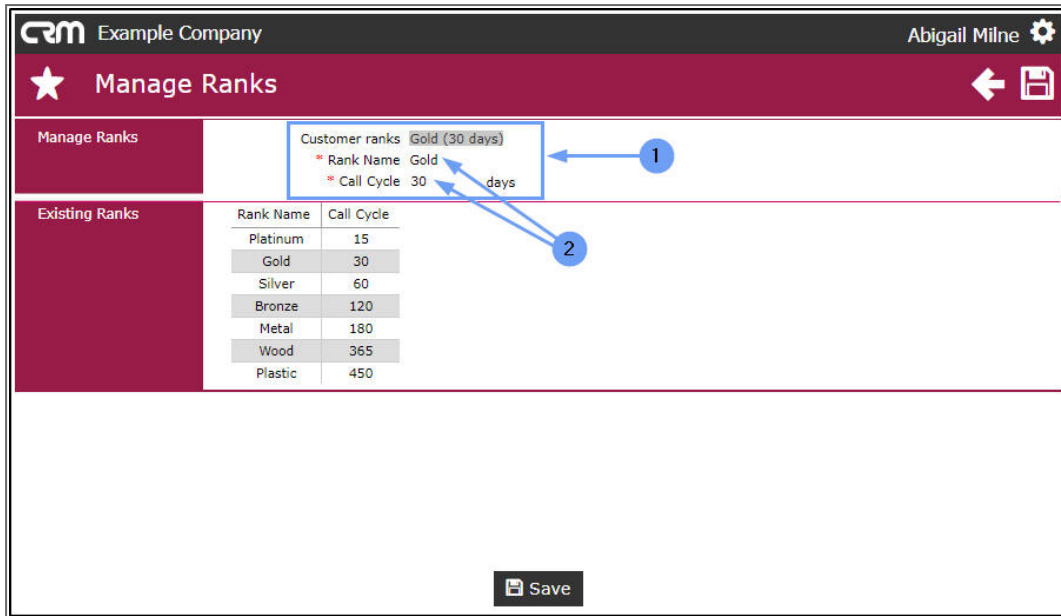


EDIT CUSTOMER RANK

1. In the **Manage Ranks** page,
2. Click on the drop-down arrow in the **Customer ranks** field and select from the list, the rank that you wish to edit.
 - In this example, the **Gold** rank has been selected.

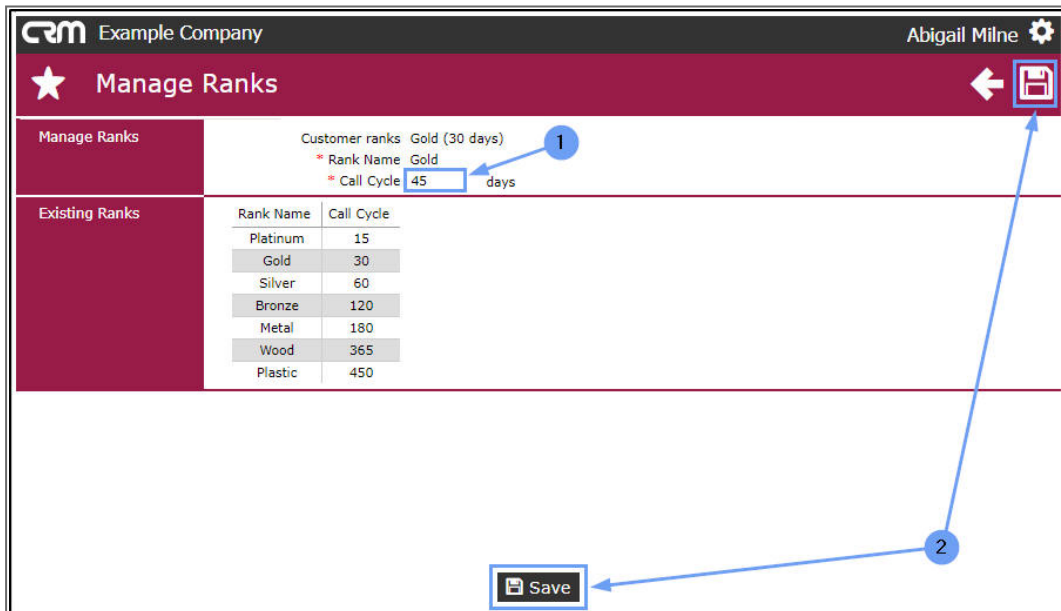


1. The selected **Rank Name** and **Call Cycle** now populate the **Manage Ranks** frame.
2. Edit / Update the details as required:
 - **Rank Name:** Highlight the original text in this field and type in the updated rank name.
 - **Call Cycle:** Highlight the original text in this field and type in the updated call cycle amount, or use the directional arrows to select the updated amount.

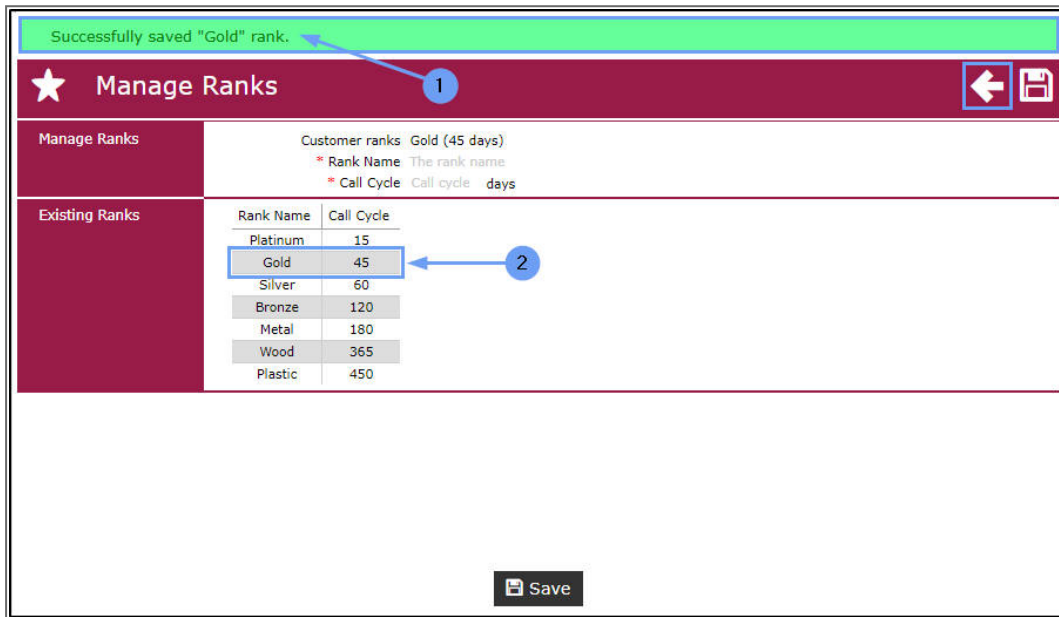


SAVE CUSTOMER RANK

- In this example, only the **Call Cycle** has been edited from **30** to **45** days.
- When you have finished edited the rank details, click on **Save**.



- The screen will refresh and a **message bar** will appear at the top of the screen;
 - Successfully saved [rank name] rank.** (Click on this message bar to acknowledge and remove it.)
- The edited rank details will now be updated in the **Existing Ranks** frame.



When you have finished updating the rank details, either click on;

- The **Back** button to return to the previous page, or
- The **CRM logo** to return to the **Homepage**.

CRM Example Company Abigail Milne

★ Manage Ranks 1

Manage Ranks 2

Customer ranks Gold (45 days)

- * Rank Name The rank name
- * Call Cycle Call cycle days

Rank Name	Call Cycle
Platinum	15
Gold	45
Silver	60
Bronze	120
Metal	180
Wood	365
Plastic	450

Save

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