

CRM CUSTOMERS

SERIALISED EQUIPMENT

In CRM, you can view serialised equipment items for the customer in 2 different screens:

- The **Equipment for [Salesman's Name] Customers** screen
 - This will list by **serial number**, all the equipment items that are linked to the salesman's customers.
 - From this screen, you can view:
 - The Contract Details linked to each serialised equipment item, if applicable.
 - The Contract Performance Report for each serialised equipment item.
- The **Equipment for [Customer Name]** screen
 - This will list by **serial number**, all the equipment items that are linked to the selected customer.
 - From this screen, you can also view:
 - The **Model No., Description, and contract details** of each serialised equipment item, if applicable.
 - The Contract Performance Report for each serialised equipment item, if applicable. (Access to this report will depend on your security rights.)

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

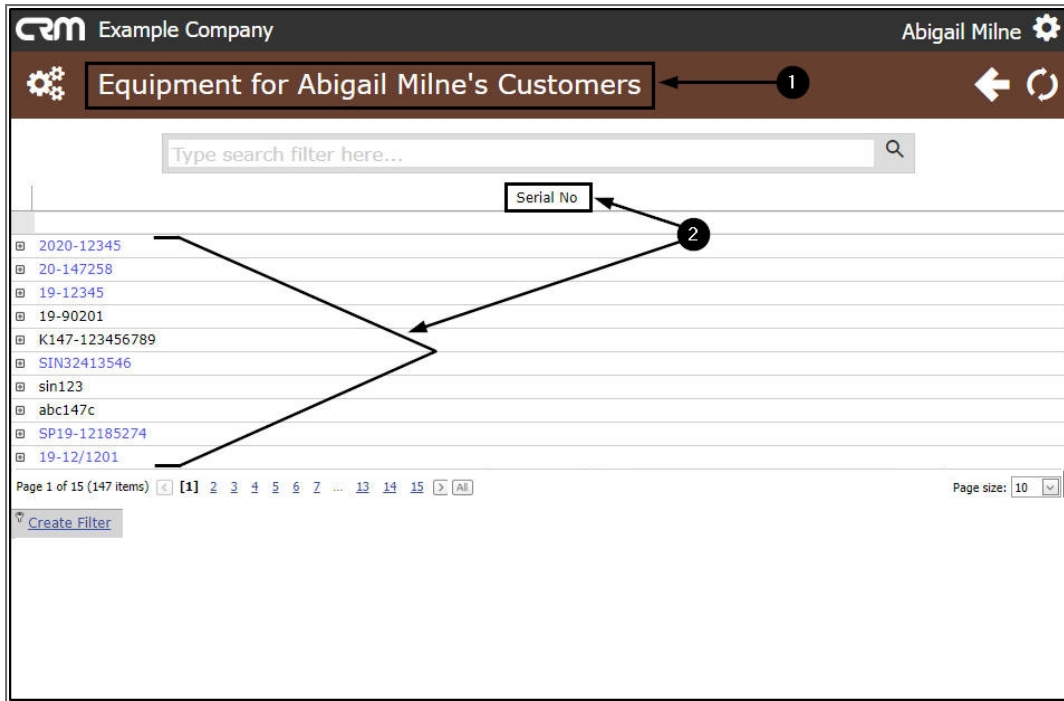
THE 'EQUIPMENT FOR [SALESMAN'S NAME] CUSTOMERS' SCREEN

1. In the *Homepage*,
2. Click on the *Equipment* tile.
3. You will note a *number* in the top right corner of this tile - this indicates the *total amount* of serialised equipment items linked to the salesman's customers.

The screenshot shows a CRM dashboard for 'Example Company' with the user 'Abigail Milne'. The dashboard includes a search bar, a 'Dashboard' tab, and several performance charts. A table shows activities for the last 30 days. A grid of tiles is visible, with the 'equipment' tile highlighted in red and containing the number '147'. Other tiles include 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', and '3rd party'.

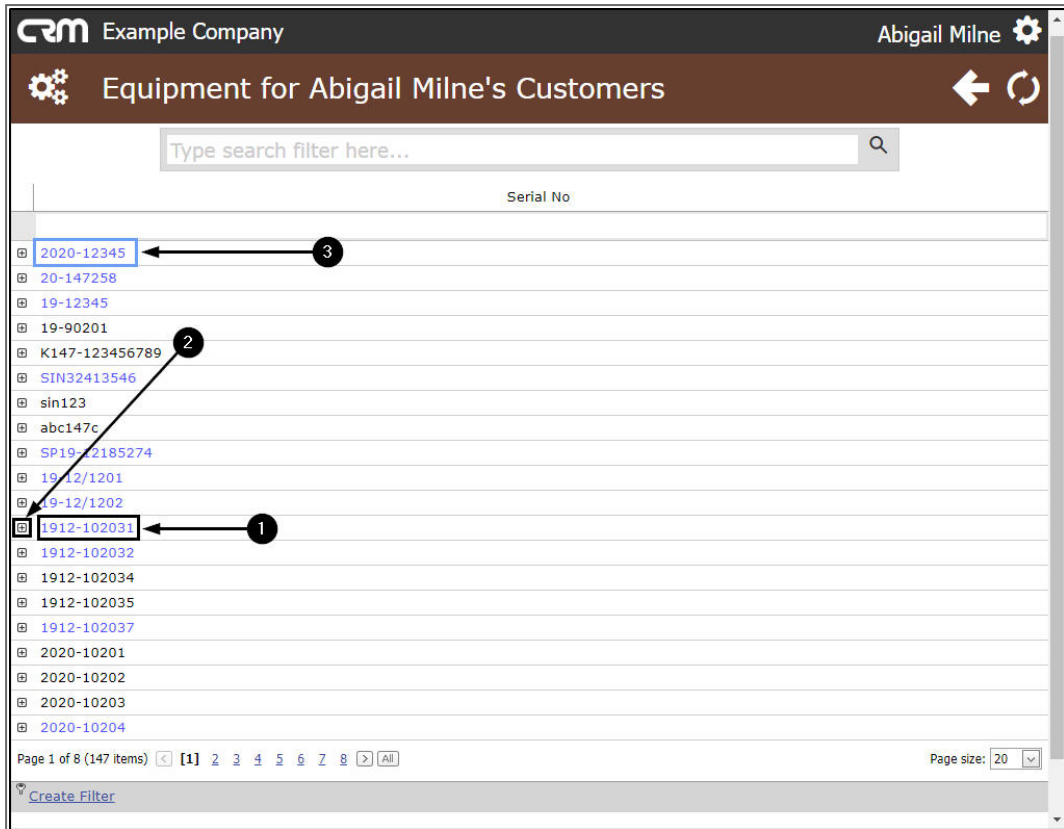
Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	8
Email	30	0	4
Meeting	40	0	3
On Site Inspection	50	0	1
Site inspection	2	0	0

1. The *Equipment for [Salesman's Name] Customers* page will open.
2. These items are listed by *Serial No.*



VIEW EQUIPMENT ITEM 'CONTRACT DETAILS'

1. Use the **scroll bar**, the **Create Filter** row or the **Filter Box** to search for the specific serial number that you wish to view the contract details of.
2. Click on the **expand** icon in front of that selected serial number.
3. Note that only the **blue**-coloured serial numbers are currently linked to contracts. The **black** serial numbers are **invoiced** equipment items.



1. A **sub-grid** will open containing details of the **contract** that is linked to this serialised equipment item.
2. **Collapse** the sub-grid when you have finished viewing it.



CRM Example Company Abigail Milne

Equipment for Abigail Milne's Customers

Type search filter here...

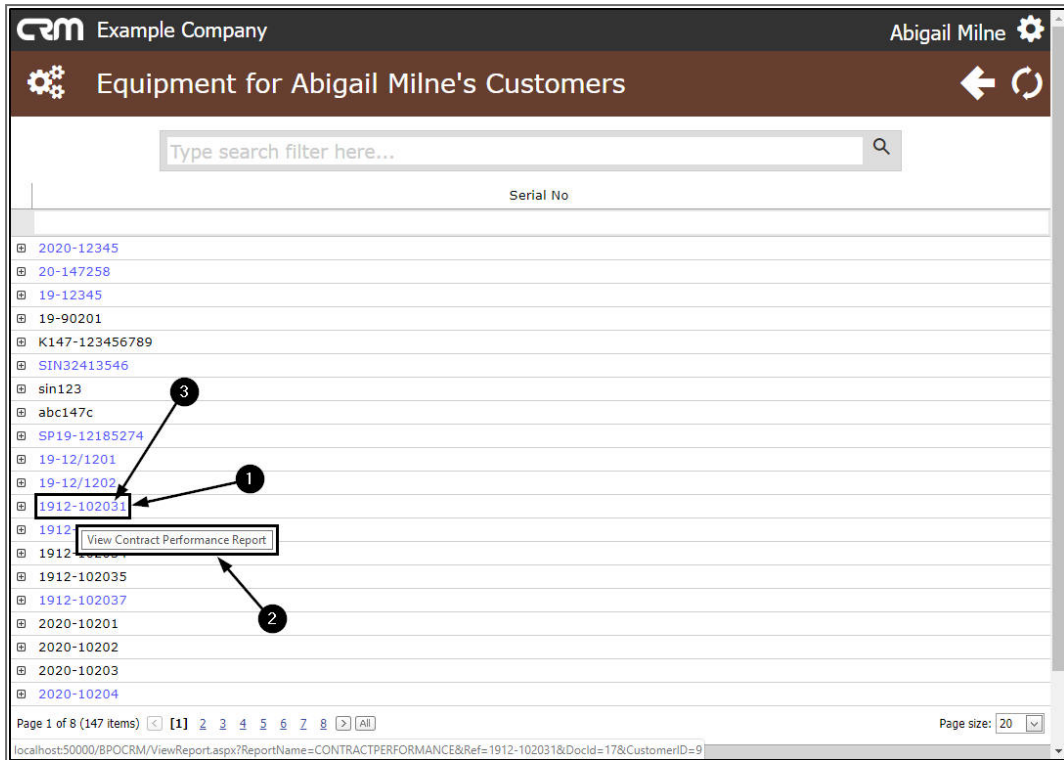
Serial No

- 2020-12345
- 20-147258
- 19-12345
- 19-90201
- K147-123456789
- SIN32413546
- sin123
- abc147c
- SP19-12185274
- 19-12/1201
- 19-12/1202
- 1912-102031
- 1912-102032
- 1912-102034
- 1912-102035
- 1912-102037
- 2020-10201
- 2020-10202

Description	Contract Usage	Unit	Prior Usage	2 Months Ago	3 Month Avg	6 Month Avg	12 Month Avg
Mono meter	4524	Copies	0	0.0	0.0	0.0	450.0

VIEW 'CONTRACT PERFORMANCE REPORT'

1. **Hover** over the serial number of the equipment item that you wish to view the Contract Performance Report of.
 - Remember this will be a **blue**-coloured number.
2. A **screen tip** will pop up with the text; **View Contract Report**.
3. Click anywhere on the serial number.



1. The **Report Viewer and Emailer** preview screen will be displayed.
2. Here, you can view, download and / or print the **Contract Performance** report.
3. *Either*, click on the **Back** button to return to the previous page.
4. *Or*, click on the **Page icon** in the top left of the page to return to the Homepage .

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main content area is titled 'Contract Performance' and displays a 'Company Logo' and contract details. The interface includes a top navigation bar with a 'Report Viewer and Emailer' button (1), a back button (3), and a refresh button. A sidebar on the left has a 'CONTRACTPERFORMANCE' tab (4). The main content area has a download button (2). The contract details include:

Contract Performance
Example Company
 Street No and Road Name: PO Box 1234
 Area: New Town
 City: Durban
 South Africa: South Africa
 0000: 1234
 Reg No.: 0000000asa4521 Fax No.: 031 12 4545
 VAT No.: 0000000 Tel No.: 031 123 4567

Contract Number : CO0000018 **Contract Status** **Active**

Contract Information:
Billed every Month
Customer : SAM001 Samanthas Diner
Salesperson : Belinda Sharman **Site :** Durban
Manager : Chris Haynes **Period :** 60 Months
Start Date : 09 Jul 2014 **Order No.:**
End Date : 09 Jul 2019 **Currency :** ZAR
Aggregate Bill : No **Tax Rate :** 14.00000
Hide Fees : No Contract to be escalated in period 5 by 10.0000 Percent

Item Information:
Model No. : SP19-12 **Serial No. :** 19-12/1202 **Reg No. :**

Description	Account Code	Fee	Start Date	Hide Invoice		
Insurance	1203	338.45	09 Jul 2014			
Item escalated in period 11 by 10.0000 Percent						
Monthly service	1101	1023.28	09 Jul 2014			
Item escalated in period 8 by 10.0000 Percent						
Description	Units	Account Code	Start Reading	Last Reading	Min Billing	Min Qty
Colour Meter	Copies	1101	5478	6704	0.00	
Item escalated in period 4 by 10.0000 Percent						
Mono meter	Copies			2700	0.00	

THE 'EQUIPMENT FOR[CUSTOMER NAME]' SCREEN

1. In the *Homepage*,
2. Click on the *Customers* tile.

CRM Example Company Abigail Milne

Dashboard Search

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Phone call	400	0	8
Email	30	0	4
Meeting	40	0	3
On Site inspection	50	0	1
Site inspection	2	0	0

1 Month Performance

Category	Value
Cases	~15,000.00
Invoices	~1,000.00
Orders	~15,000.00
Quotes	~15,000.00

4 Month Pipeline

Month	Value
Aug 2019	~1,500.00
Sep 2019	0.00
Oct 2019	0.00
Nov 2019	0.00

Dashboard Tiles:

- create cold call: 30 Sep 2016, 0
- recommendations: 6
- warnings: 6
- customers: 74
- cases: 6
- activities: 6
- quotes: 6
- equipment: 147
- 3rd party: 4

Calendar View: Today, Recent, Calendar. Schedule Date: [Dropdown]. Status: [Dropdown]. No data to display.

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1. The **Customers** page will open.
2. Use the **Page Reference** field, **scroll bar** or **Filter Text Box** to find the applicable customer.
3. Click in the **View** column in the row of the selected customer.
 - In this example, the selected customer is **Hope Works**.

The screenshot shows a CRM interface for 'Example Company' with the user 'Abigail Milne'. The main navigation bar has a 'Customers' tab highlighted with a circled '1'. Below it is a search bar with the placeholder text 'Type Customer name search filter here...'. A table lists customer records with columns: View, Customer, Code, Contact, Contact phone, Contact email, Comple, Status, Rank, Active, and Call Contact. The first row, 'Hope Works', is selected, indicated by a circled '3' and a mouse cursor. At the bottom, a pagination control shows 'Page 4 of 8 (73 items)' with a circled '2' pointing to the page number '4'. A circled '2' also points to the 'Contact email' column header.

View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
	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

- The selected **Customer Homepage** will be displayed.
- Click on the **Equipment** tile.

The screenshot shows a CRM dashboard for 'Example Company' with user 'Abigail Milne'. The main header includes a search bar and a navigation menu. A sidebar on the left contains a grid of icons for various functions: create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files. The 'equipment' icon is highlighted with a circled '2'. The main content area displays 'Hope Works - HOP001' with a 75% completion indicator. It includes a table for 'Activities for Last 30 Days', a '1 Month Performance' bar chart, a '4 Month Pipeline' bar chart, and a '12 Months Sales History' bar chart. The sales history chart shows 'Contract Income' (yellow) and 'Sales Revenue' (blue) from August 2018 to August 2019. The footer contains the CO3 Technologies logo and copyright information.

1. The **Equipment for [Customer Name]** page will open.
2. As well as listing the equipment items by **Serial No**, this page also contains columns for the:
 - **Model No** and
 - **Description** of each item.
3. You can view **Contract Information** columns in this page:
 - **Contract No**
 - **Months Remaining**
 - **Avg Monthly Copies**
 - **Avg Monthly Invoice**

- Avg Monthly Costs
- Avg Monthly NP

4. You can view the **Available Upgrade Budget** information for each item.

Serial No	Model No	Description	Contract No.	Months Remaining	Avg Monthly Copies	Avg Monthly Invoice	Avg Monthly Costs	Avg Monthly NP	Available Upgrade Budget
2020-12345	SP2020	SP2020 Sprint Colour Multi Functional Copier	CO0000010	-43	31.00	1.85	-16.77	-14.92	0.00
20-147258	SP2020	SP2020 Sprint Colour Multi Functional Copier		0	0.00	0.00	0.00	0.00	0.00
SIN32413546	K147	K147 Kyocera Colour Copier	CO0000020	-43	0.00	0.00	-27.97	-27.97	0.00
2020-102040	SP2020	SP2020 Sprint Colour Multi Functional Copier	CO0000010	-43	0.00	0.00	-16.77	-16.77	0.00
2020-102042	SP2020	SP2020 Sprint Colour Multi Functional Copier	CO0000052	33	0.00	0.00	0.00	0.00	0.00
2020-102043	SP2020	SP2020 Sprint Colour Multi Functional Copier	CO0000010	-43	0.00	0.00	-16.77	-16.77	0.00
1912-102043	SP19-12	SP19-12 Colour Copier		0	0.00	0.00	0.00	0.00	0.00
NMACH123		New Machine	CO0000062	52	0.00	0.00	0.00	0.00	0.00
1020-1478	SP1020	Copier		0	0.00	0.00	0.00	0.00	0.00
478-1234	1020-478	Staple Unit	CO0000062	52	0.00	0.00	-18.75	-18.75	0.00

In this page - you can:

1. Use the **Filter Row** or the **Create Filter** functionality to search for specific details.
2. View the serialised equipment **Contract details**, if applicable, (the blue-coloured serial numbers are linked to contracts).
3. View the **Contract Performance Report**, if applicable, (the **blue**-coloured serial numbers are linked to contracts).
4. Click on the **Customers** icon to return to the Customer Homepage.
5. Click on the **Back** button to return to the previous page.
6. Click on the **page icon** on the top left of the page to return to the Homepage.

CRM Example Company Abigail Milne

Equipment for Hope Works 5

Serial No	Model No	Description	Contract No.	Months Remaining	Avg Monthly Copies	Avg Monthly Invoice	Avg Monthly Costs	Avg Monthly NP	Available Upgrade Budget
2020-12345	SP2020	SP2020 Sprint Colour Multi Functional Copier	CO0000010	-43	31.00	1.85	-16.77	-14.92	0.00
20-147258	SP2020	SP2020 Sprint Colour Multi Functional Copier		0	0.00	0.00	0.00	0.00	0.00
SIN32413546	K147	K147 Kyocera Colour Copier	CO0000020	-43	0.00	0.00	-27.97	-27.97	0.00
2020-102040	SP2020	SP2020 Sprint Colour Multi Functional Copier	CO0000010	-43	0.00	0.00	-16.77	-16.77	0.00
2020-102042	SP2020	SP2020 Sprint Colour Multi Functional Copier	CO0000052	33	0.00	0.00	0.00	0.00	0.00
2020-102043	SP2020	SP2020 Sprint Colour Multi Functional Copier	CO0000010	-43	0.00	0.00	-16.77	-16.77	0.00
1912-102043	SP19-12	SP19-12 Colour Copier		0	0.00	0.00	0.00	0.00	0.00
NMACH123		New Machine	CO0000062	52	0.00	0.00	0.00	0.00	0.00
1020-1478	SP1020	Copier		0	0.00	0.00	0.00	0.00	0.00
478-1234	1020-478	Staple Unit	CO0000062	52	0.00	0.00	-18.75	-18.75	0.00

Page 1 of 8 (76 items) Page size: 10

Create Filter

CRM.002.010