CRM CUSTOMERS

THIRD PARTY

Third Party contains information relating to a customer's current (or expired) contract with a third party provider.

This is helpful for the various reasons including the following:

- To know when to contact your client when their third party contract ends / is due to end.
- To know what your client's current **Item(s)** and **Item(s) Usage** charges are, so that when you create a proposal or quote - you can ensure that it is competitive.

In **CRM** , you can access current Third Party information for a customer in **2** different pages:

1. From the CRM **Homepage**. This will direct you to the ***Third Party for [Salesman's Name] Customers*** page:
   - This will list all the salesman's customers that are linked to Third Party contracts. This process is covered in CRM Basics: Third Party.
2. From the **Customer Homepage**. This will direct you to the ***Third Party for [Customer Name]*** page:
   - This will list all the Third Party contracts linked to the selected customer.

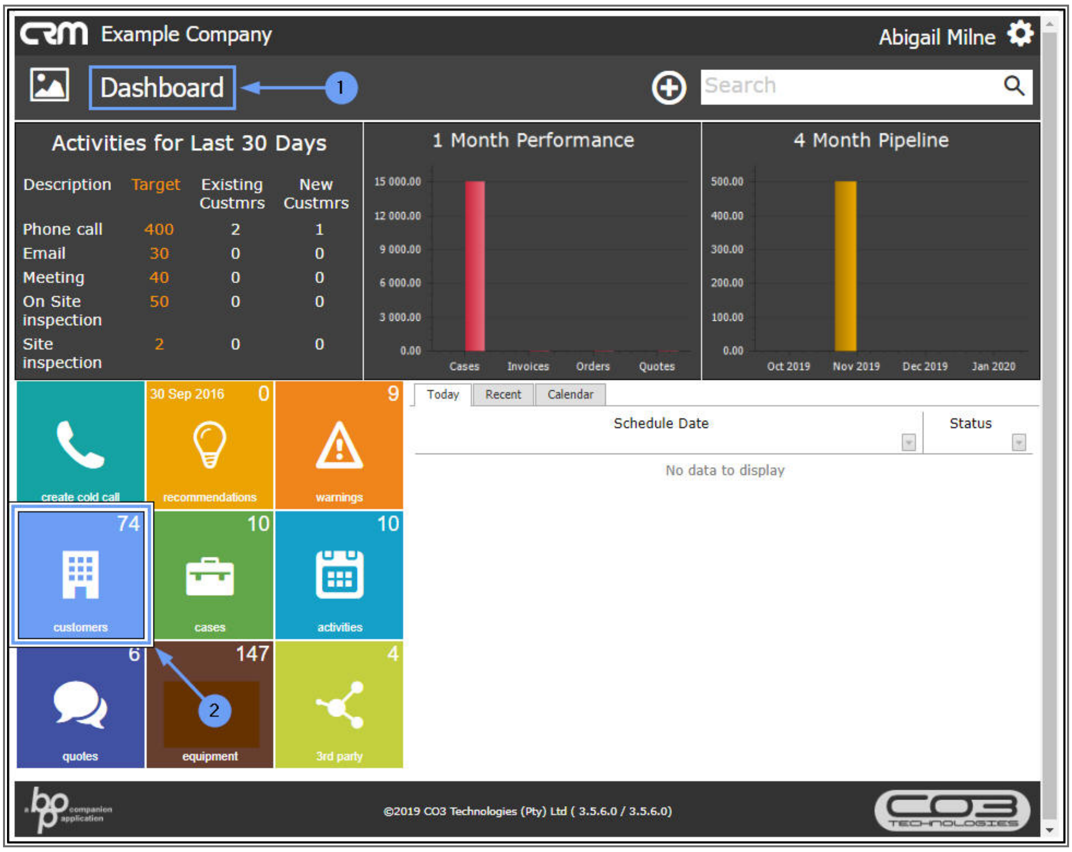
The **2nd** process is covered in *this* manual.

Note: To Add a ***new*** Third Party to a Customer, it is quickest to navigate from the Customers (listing) page.

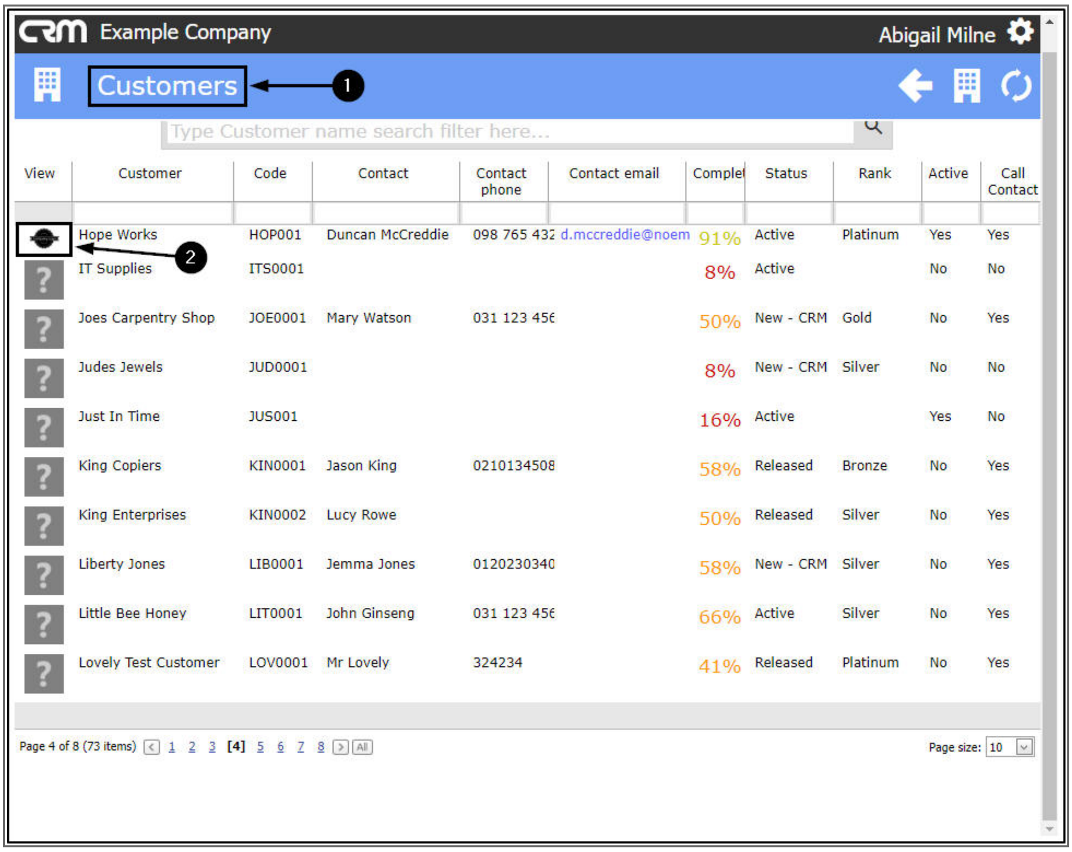
Ribbon Access: *Webpage > http://[servername]:[port-no]/BPOCRM/User.aspx*

ACCESS CURRENT THIRD PARTY INFORMATION FROM THIRD PARTY FOR *[CUSTOMER NAME]* PAGE

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



1. The ***Customers*** page will open.
2. Click on the selected ***Customer Logo*** in the ***View*** column.

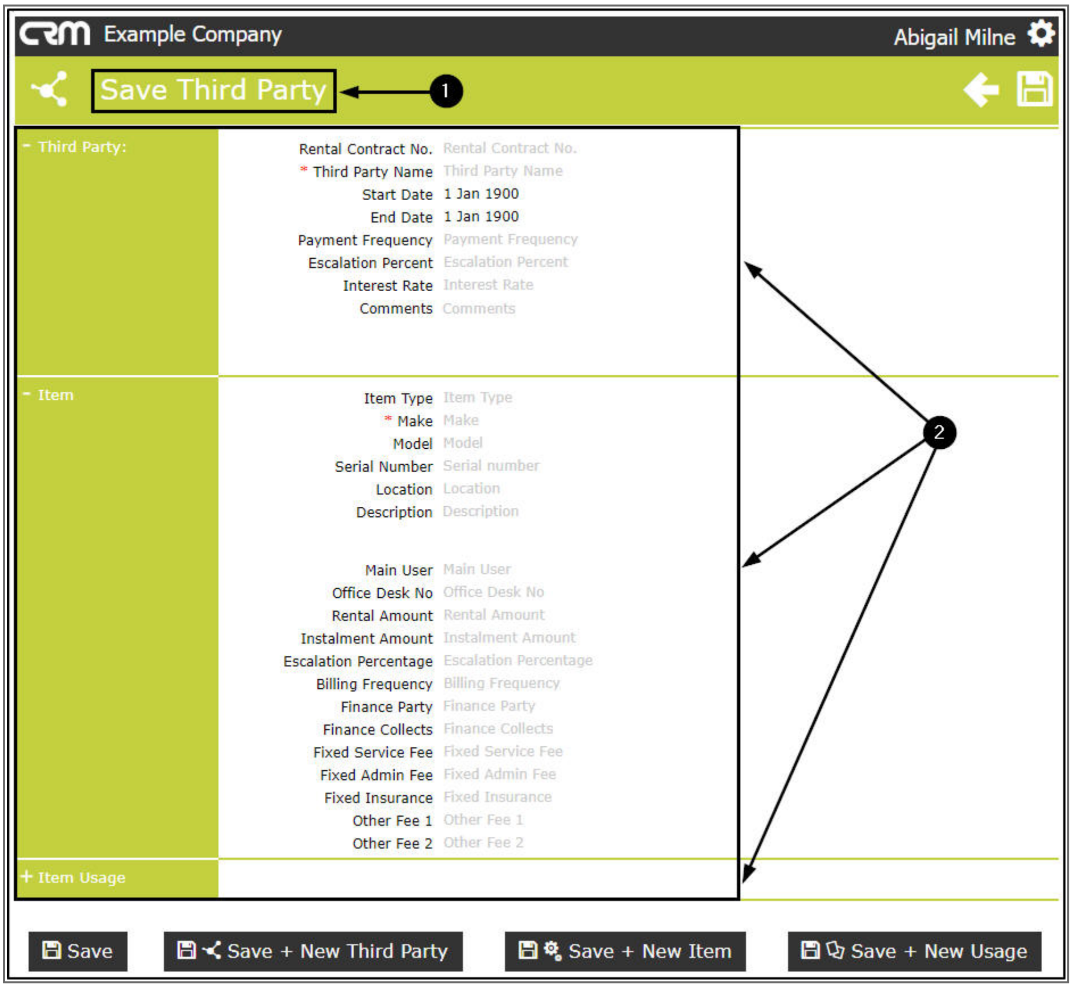


1. The selected ***Customer Home page*** will open.
2. Click on the ***Third Party*** tile.

1. The ***Third Party for [Customer]*** page will open.
2. Here you can view a list of <u>all</u> the Third Party contracts 'Main' Information linked to this <u>specific</u> customer.
3. Click on the expand icons to Quick View the Third Party Item and Quick View the Third Party Item Usage.
4. You can hover over any of these frames to display the Action buttons:
    - View / Edit
    - Delete

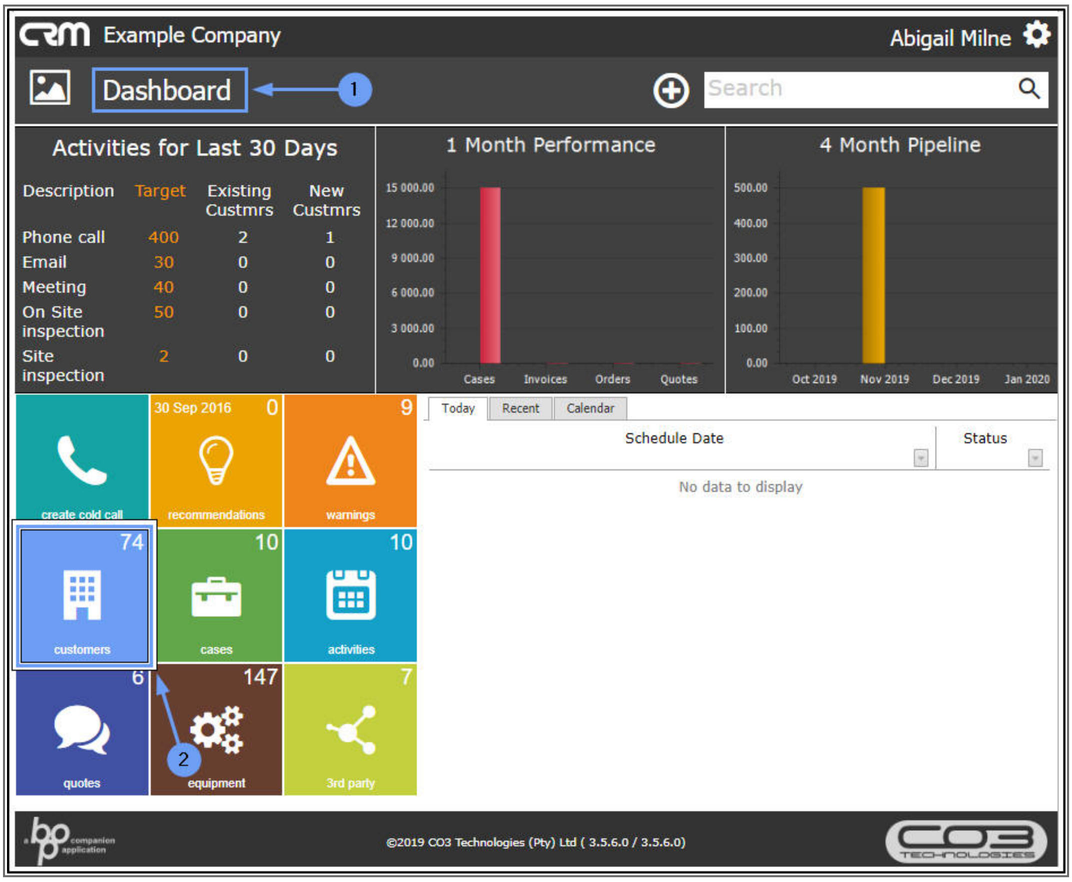
Use these buttons to;

i. View / Add /Edit the Third Party 'main' information,
ii. View / Add /Edit the Third Party 'item' information,
iii. View / Add /Edit the Third Party 'item usage' information,

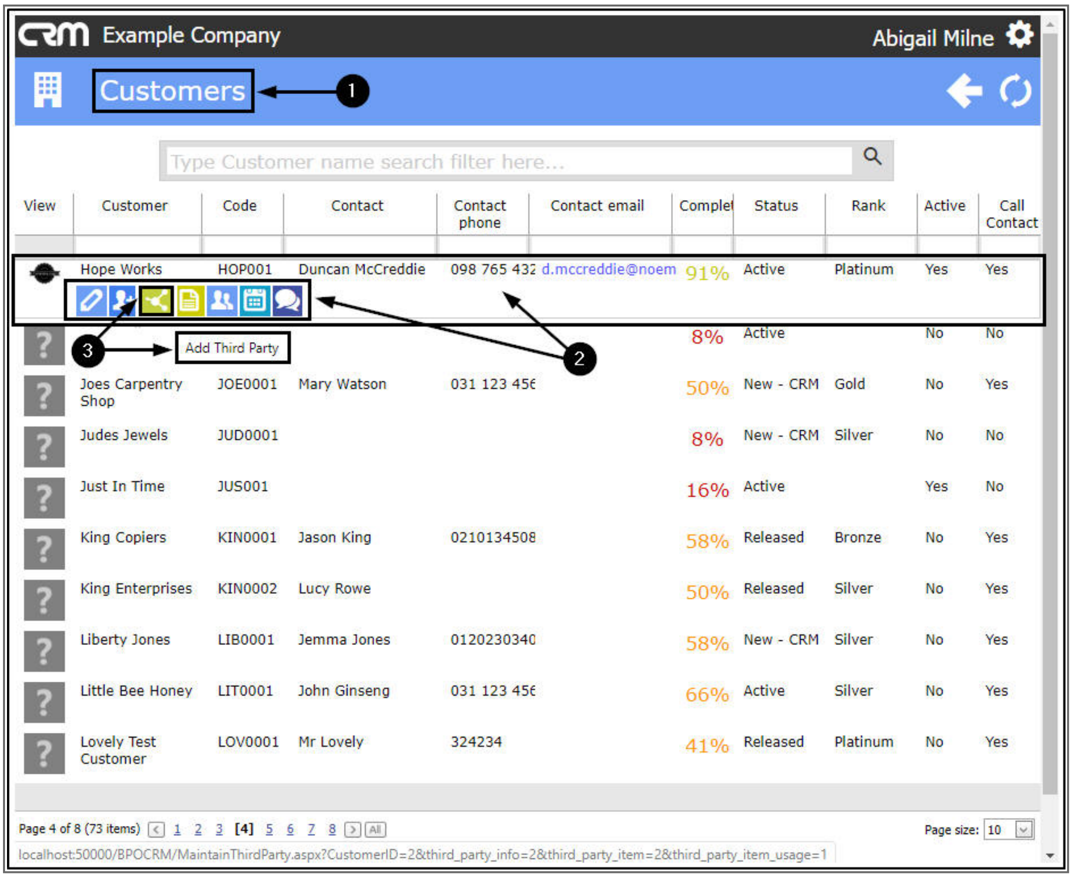


ADD NEW THIRD PARTY INFORMATION DIRECTLY FROM THE CUSTOMERS (LISTING) PAGE

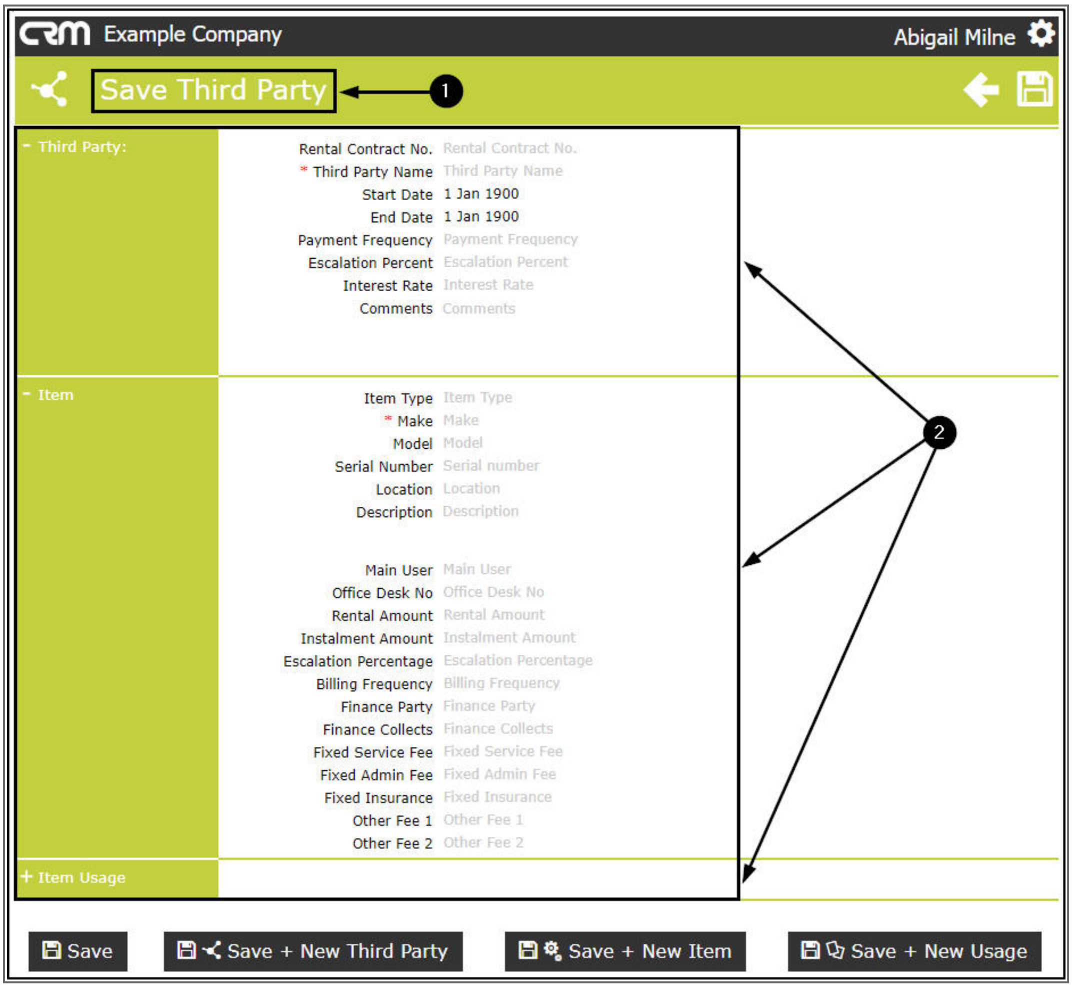
1. In the CRM ***Homepage***,
2. Click on the ***Customers*** tile.



1. The ***Customers*** (listing) page will open.
2. Hover over the selected customer until you can view the ***Action buttons*** panel.
3. Click on the ***Add Third Party*** button.



1. The ***Save Third Party*** page will open.
2. You can now add the new Third Party Main Information, Item Information and Item Usage Information as described in the Basics: Third Party manual.



Example Company
Abigail Milne
Save Third Party
1
- Third Party:
Rental Contract No. Rental Contract No.
* Third Party Name Third Party Name
Start Date 1 Jan 1900
End Date 1 Jan 1900
Payment Frequency Payment Frequency
Escalation Percent Escalation Percent
Interest Rate Interest Rate
Comments Comments
- Item
Item Type Item Type
* Make Make
Model Model
Serial Number Serial number
Location Location
Description Description
Main User Main User
Office Desk No Office Desk No
Rental Amount Rental Amount
Instalment Amount Instalment Amount
Escalation Percentage Escalation Percentage
Billing Frequency Billing Frequency
Finance Party Finance Party
Finance Collects Finance Collects
Fixed Service Fee Fixed Service Fee
Fixed Admin Fee Fixed Admin Fee
Fixed Insurance Fixed Insurance
Other Fee 1 Other Fee 1
Other Fee 2 Other Fee 2
+ Item Usage
2
Save
Save + New Third Party
Save + New Item
Save + New Usage

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