CRM CUSTOMERS

CUSTOMER ACTIONS BUTTONS

You can access and add more customer information to **CRM** using the customer **Action buttons**, available in both the **Customers** listing screen and the **Customer Dashboard** (Customer Home page).

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

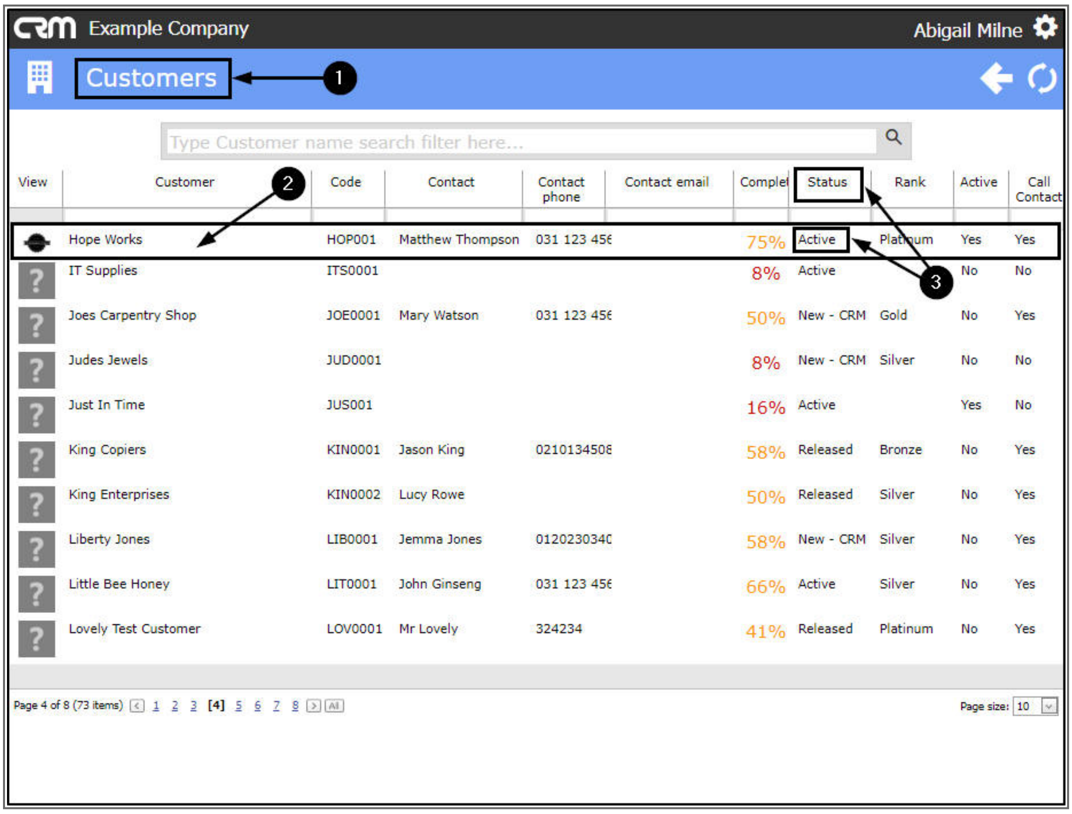
NAVIGATE TO THE CUSTOMERS LISTING PAGE:

1. In the ***Dashboard*** (Home page),
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.

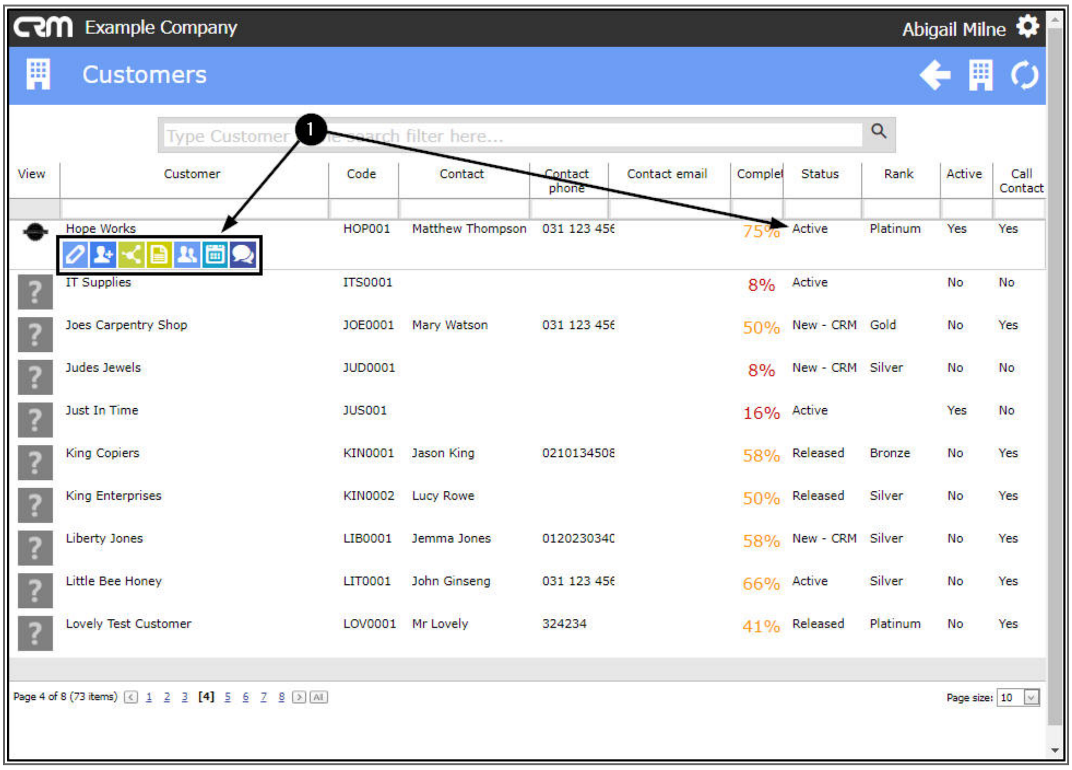
1. The ***Customers*** (listing) page will open.

VIEW ACTIVE OR RELEASED CUSTOMER ACTION BUTTONS

2. ***Hover anywhere*** in the row of a selected customer.
3. You will note that the customer status in this example is ***Active***. (Active and Released customers will display the same Action buttons.)

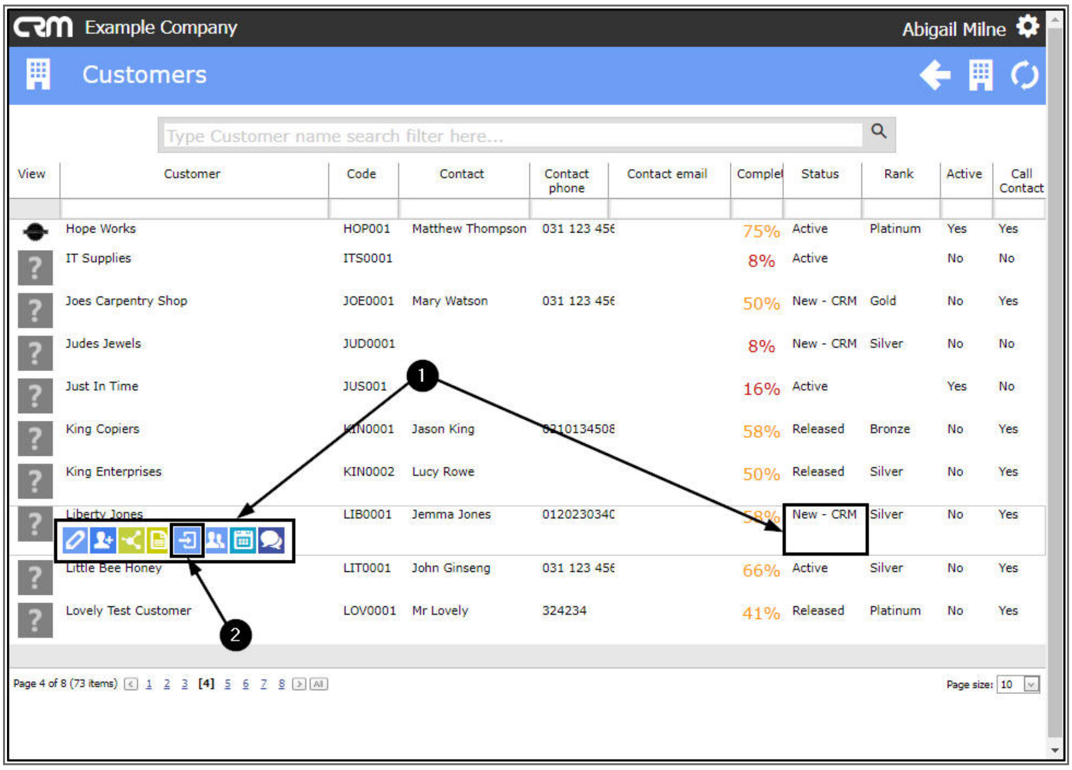


1. The Active customer ***Action*** buttons will be displayed:
    - **Edit Customer**
    - **Add Contact**
    - **Add Third Party**
    - **Add Note**
    - **Maintain Customer Salesmen**
    - **New Activity**
    - **New Quote**



VIEW NEW-CRM CUSTOMER ACTION BUTTONS

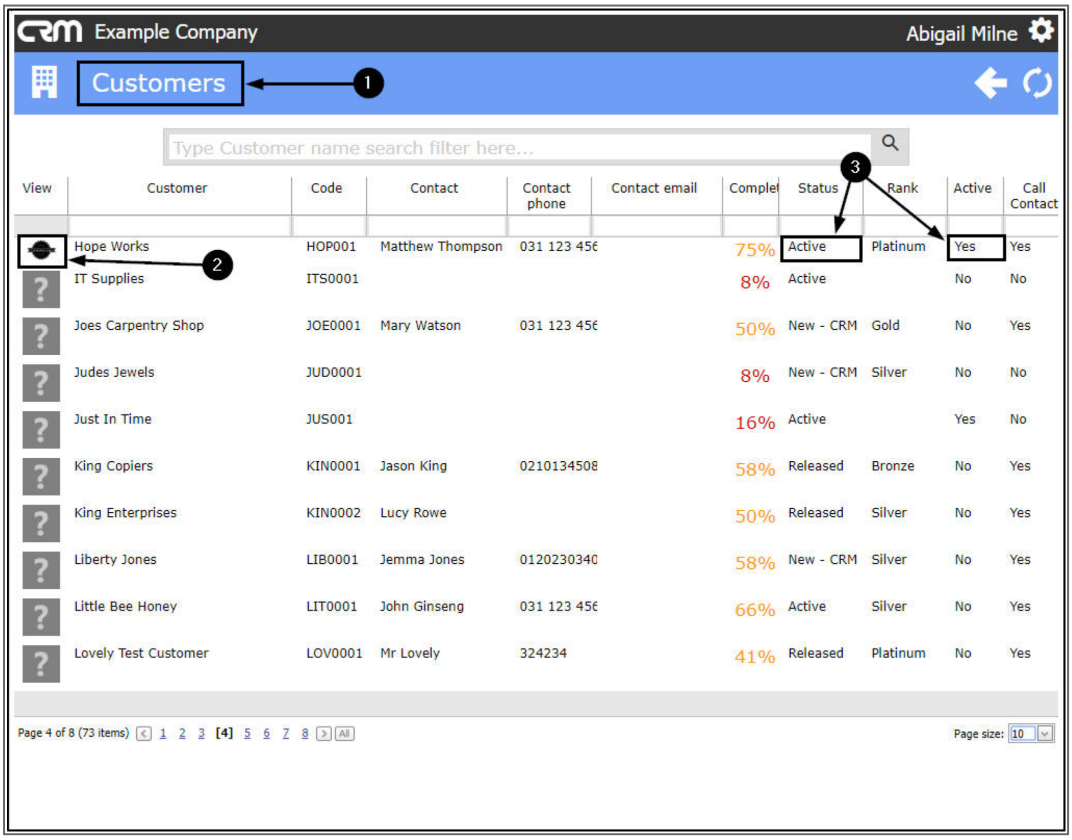
1. ***Hover anywhere*** in the row of a ***New - CRM*** customer.
2. With New-CRM customers, the Action buttons displayed will include the Release Customer button.



You can either view and add customer information directly from this ***Customers*** page or you can navigate to the selected ***Customer Dashboard*** to view the same buttons.

NAVIGATE TO THE CUSTOMERS DASHBOARD (CUSTOMER HOME PAGE) PAGE:

1. In the ***Customers*** listing page,
2. Select a specific customer by clicking on the icon next to that customer name, in the ***View*** column.
3. You will note that the customer selected in this example (Hope Works) is an ***Active*** customer - this will affect the Action button options that will be available.



1. The ***Customer Dashboard*** (Customer Home page) page will open.

   Note: If you wish to have more space on this page to view your customer information more clearly, you can change your page ***Settings***.

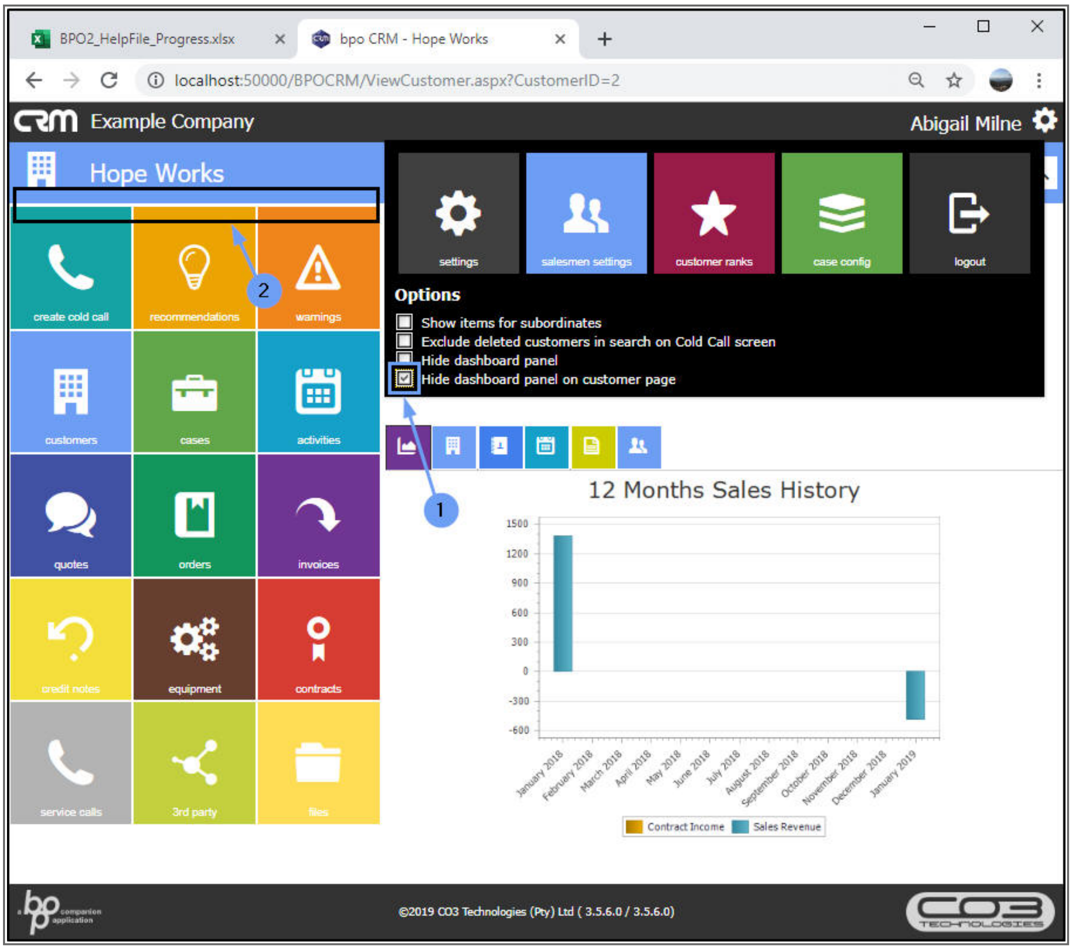
2. This will ***hide*** the customer dashboard panel.

   Select the **'Hide dashboard panel on customer page'** setting

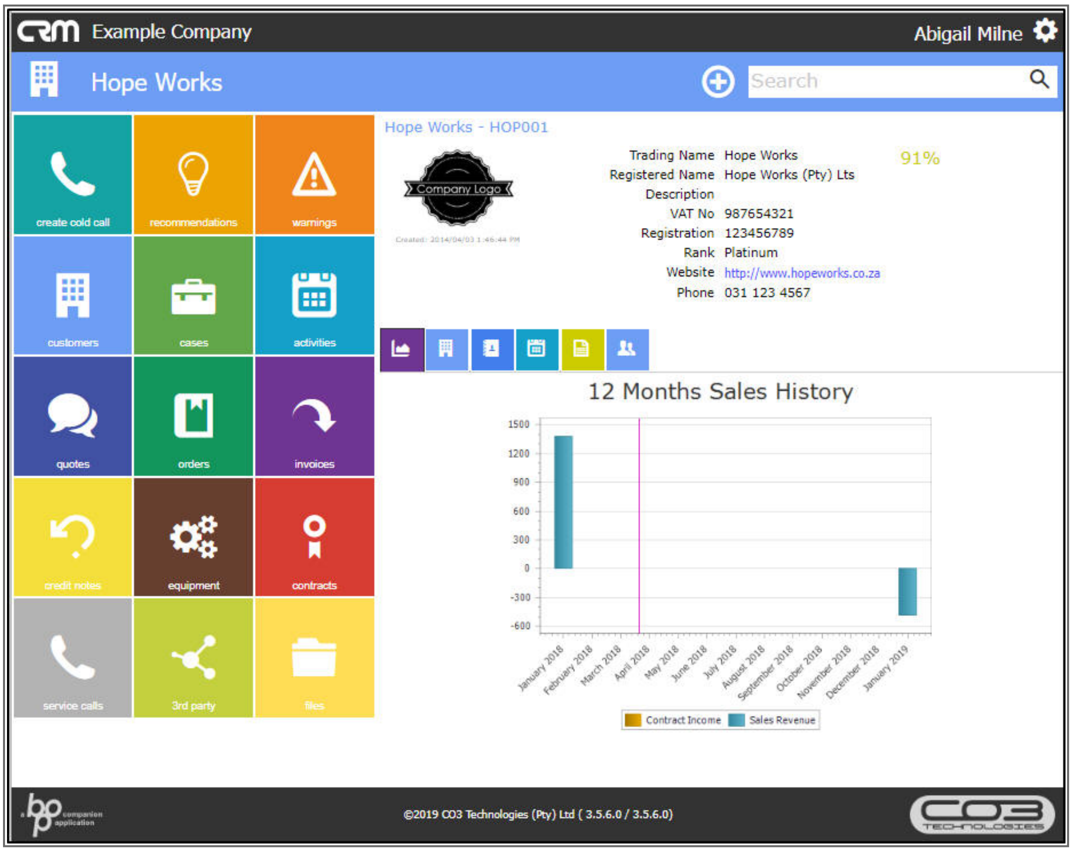
3. Click on the ***Settings*** icon.

1. The ***Setting panel*** will be expanded.
2. Select the ***'Hide dashboard panel on customer page'*** checkbox.

1. As you select the check box,
2. The ***Dashboard panel*** will disappear from the screen.



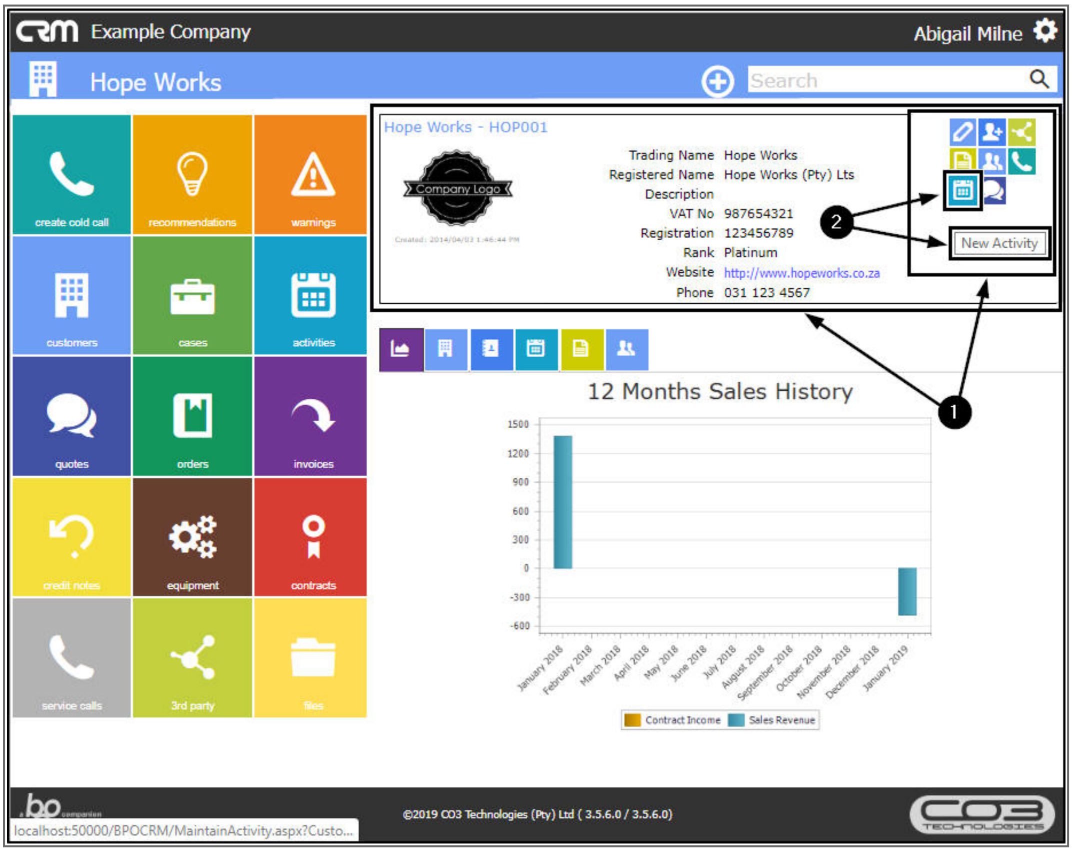
- Click outside of the Settings frame to view the full page without the Dashboard.



VIEW CUSTOMER INFORMATION: ACTION BUTTONS

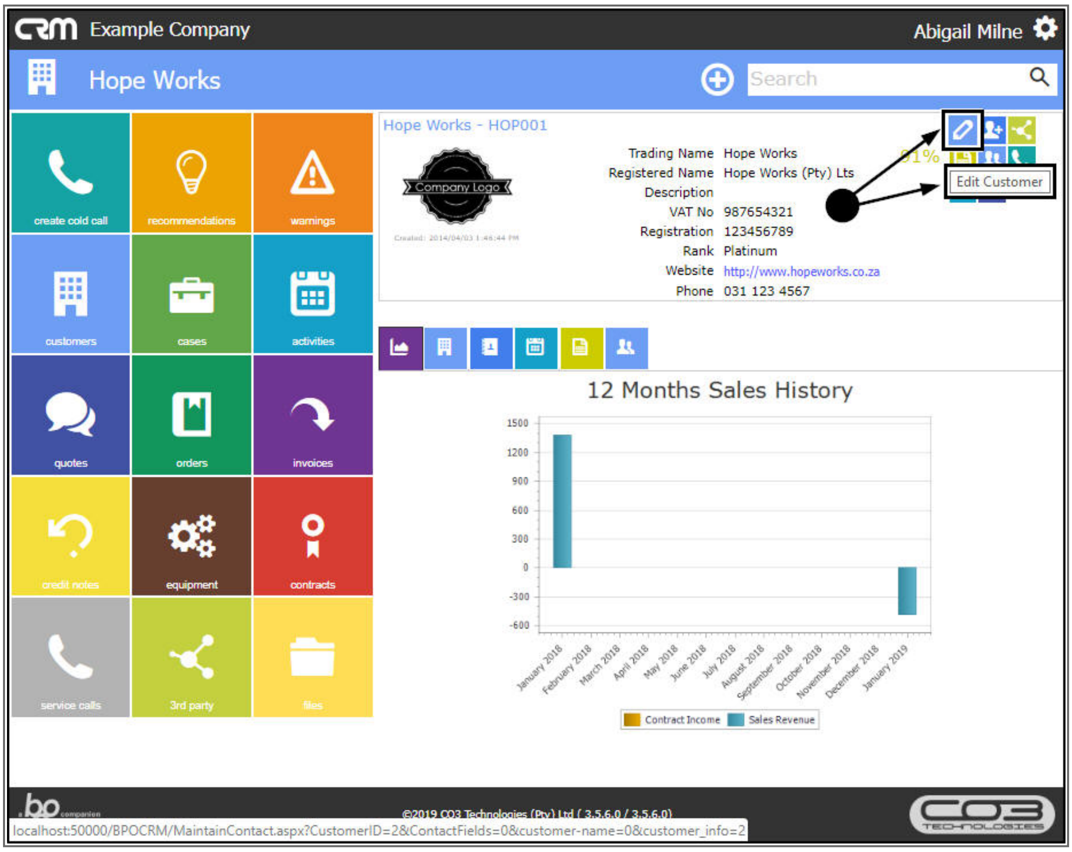
1. Hover anywhere over the Customer Information frame to display the ***Action buttons***.
    - **Edit Customer**
    - **Add Contact**
    - **Add Third Party**
    - **Add Note**
    - **Maintain Customer Salesman**
    - **Create Cold Call**
    - **New Activity**
    - **New Quote**
2. ***Hover over*** a specific Action button to display that button description:

Note: You can single click on the Customer Information frame to keep the Action buttons consistently displayed in this frame.

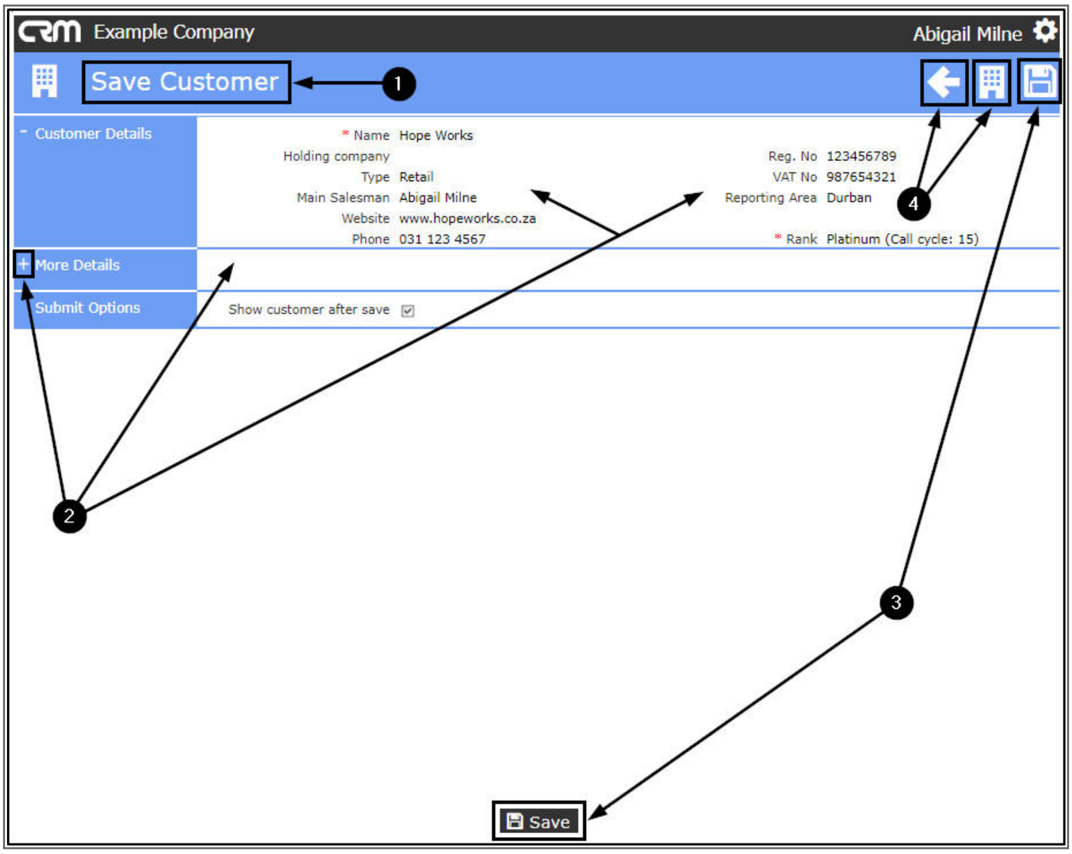


EDIT CUSTOMER

- Click on the ***Edit Customer*** action button.



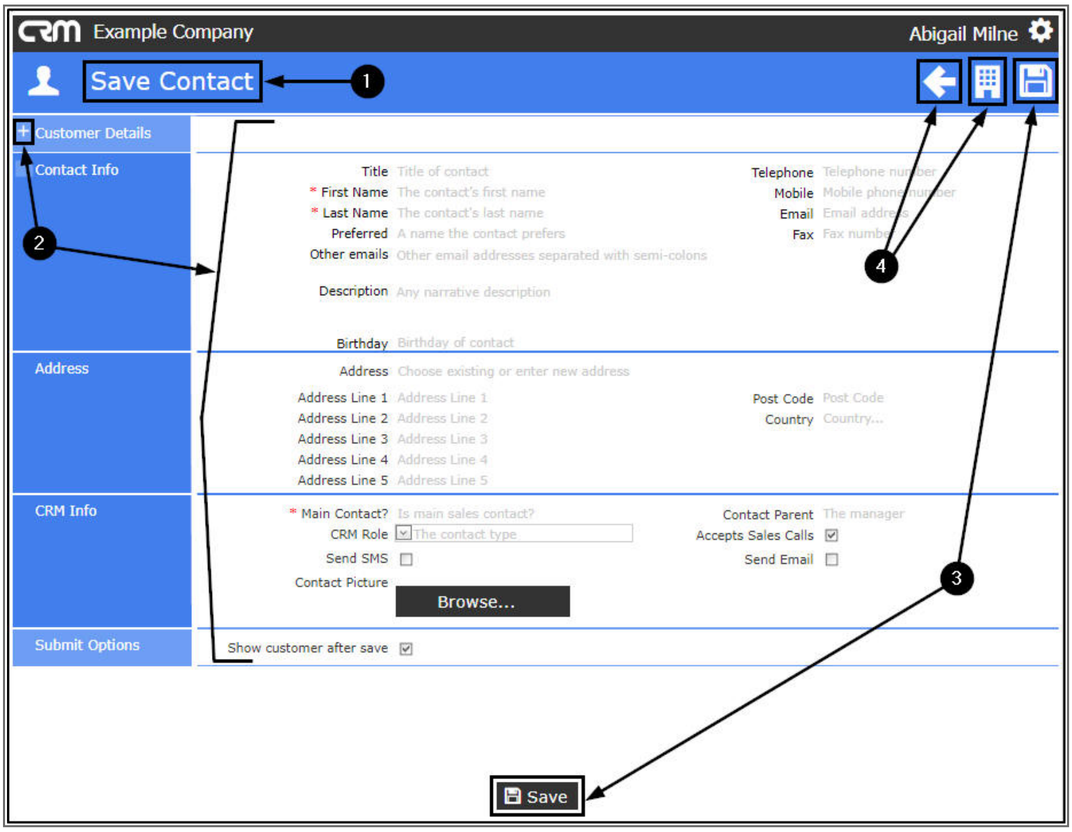
1. The ***Save Customer*** page will open.
2. In this page you can expand the ***More Details*** frame and add to or edit the customer details, as required.
3. When you are done, you can either ***Save*** any changes made,
4. Or click on either the ***Back*** icon or the ***Customer*** icon to return to the previous/Customer page.



ADD CONTACT

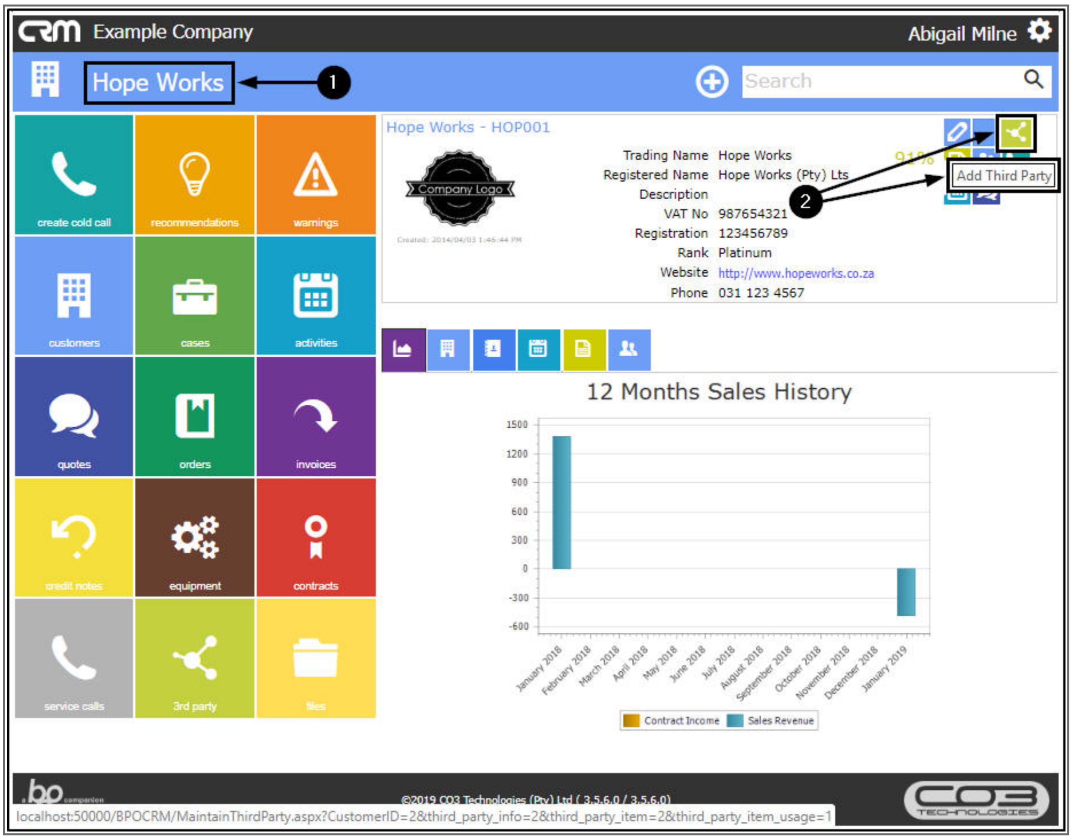
1. In the ***Customer*** home page,
2. Click on the ***Add Contact*** action button.

1. The ***Save Contact*** page will open.
2. In this page you can expand the ***Customer Details*** frame and add to or edit the contact details, as required.
3. When you are done, you can either ***Save*** any changes made,
4. Or click on either the ***Back*** icon or the ***Customer*** icon to return to the previous/Customer page.



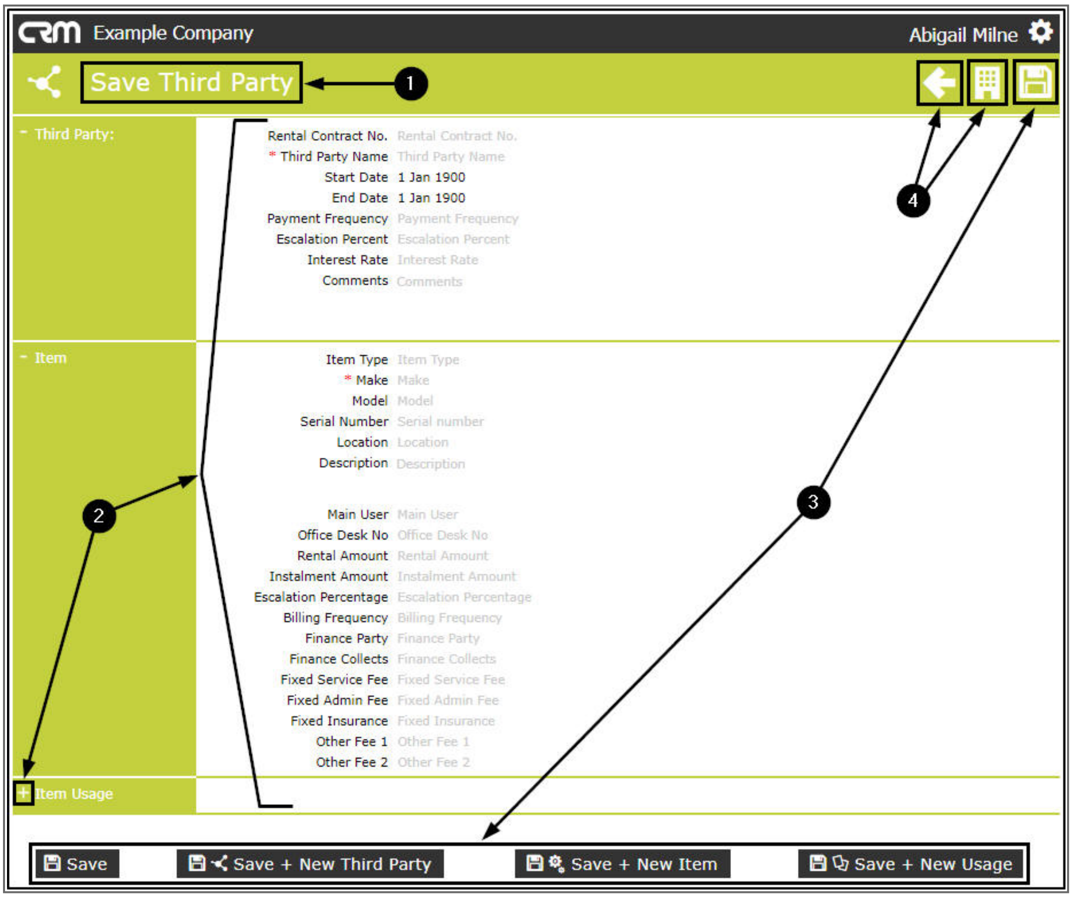
ADD THIRD PARTY

1. In the ***Customer*** home page,
2. Click on the ***Add Third Party*** action button.



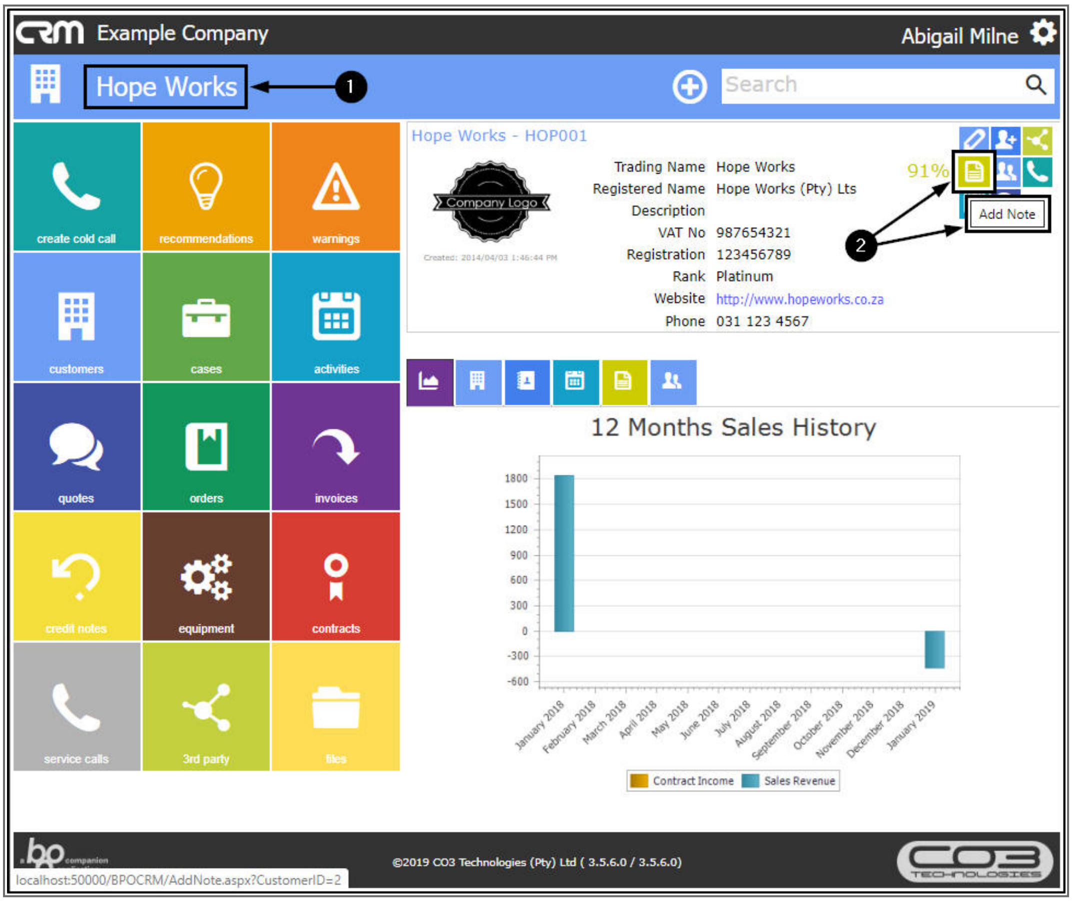
1. The ***Save Third Party*** page will open. This page is for main information regarding the Third Party and the contract details.
2. In this page you can expand the ***Item Usage*** frame and add to or edit the third party details, as required.
3. When you are done, you can either select one of the Save options to keep any changes made,
4. Or click on either the ***Back*** icon or the ***Customer*** icon to return to the previous/Customer page.

Note: You may not have all the third party information, but CRM provides fields for all relevant contract information. Fields with a red asterisk (*) are mandatory.

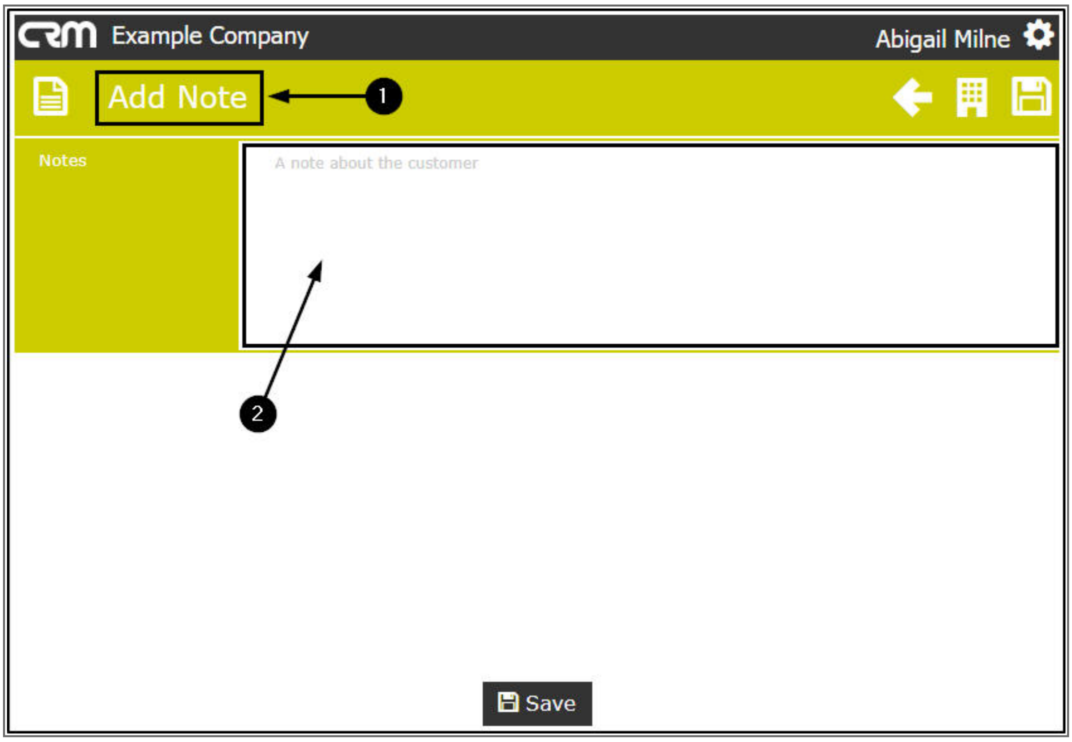


ADD NOTE

1. In the ***Customer*** home page,
2. Click on the ***Add Note*** action button.



1. The ***Add Note*** page will open.
2. Type in a note about the customer in the frame outlined.



1. When you have typed in the required note,

   Either,

2. Click on ***Save***, the note will be saved and you will return to the Customer home page.

   Or, if you do not wish to save the note:

3. Click on ***Back*** to return to the previous page,

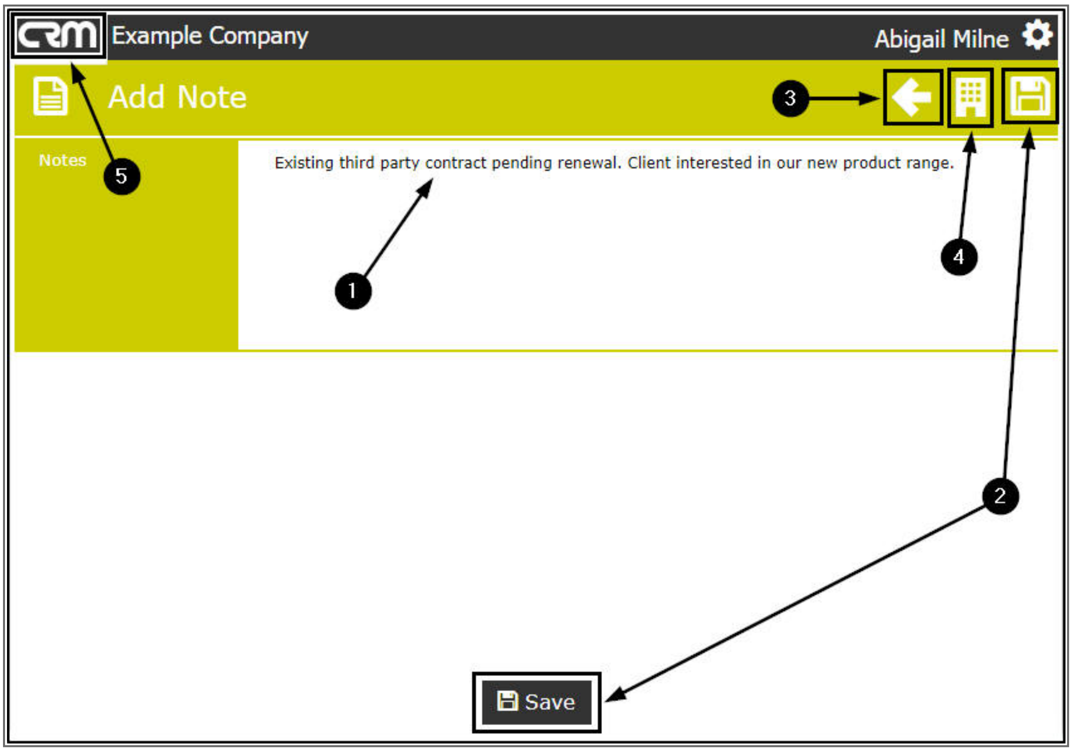
   or,

4. Click on the ***Customer icon*** to return to the Customer home page,

   or,

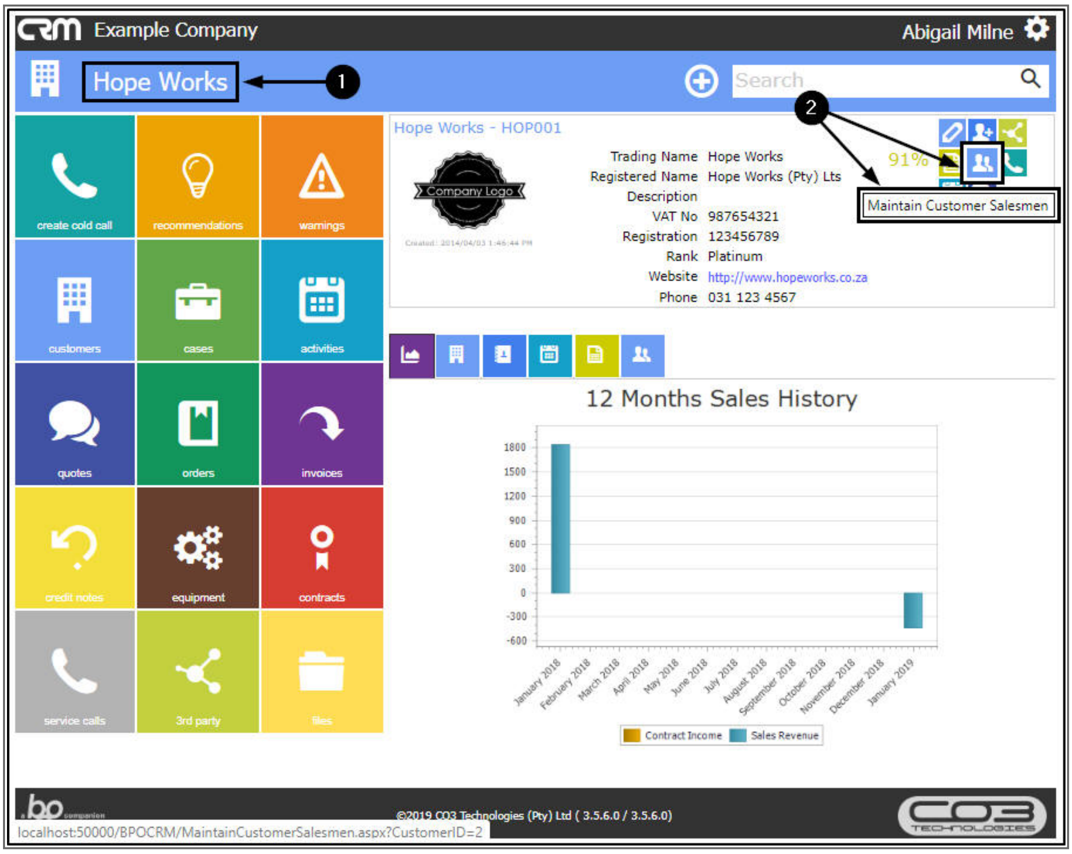
5. Click on the ***CRM logo*** to return to the Dashboard (Home page).

> **Note**: You can view this note (and any other notes linked to this customer) by clicking on the Notes Detail tile in the Customer home page.

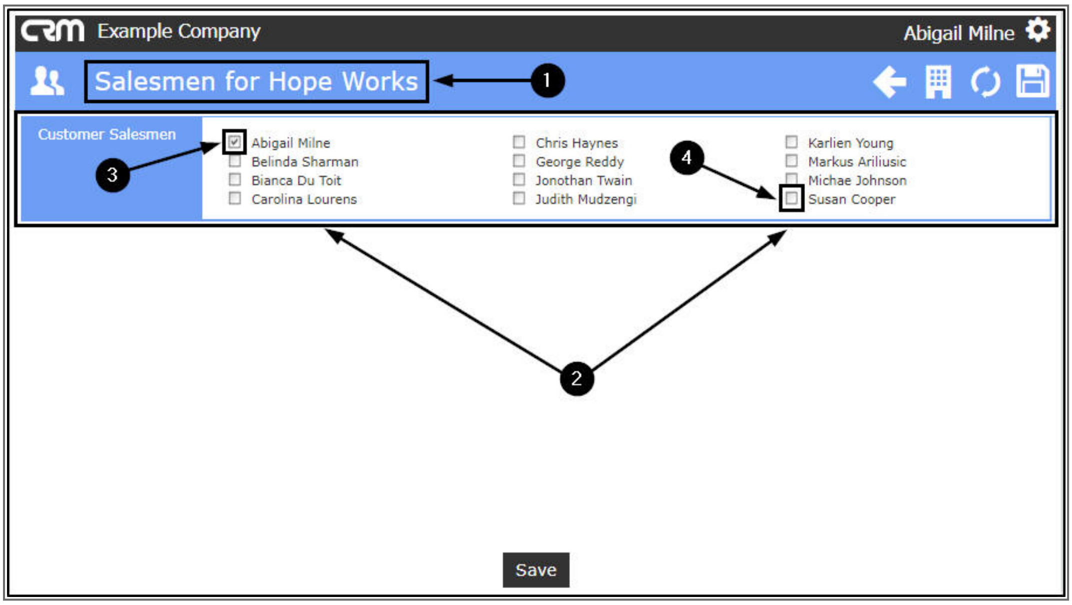


MAINTAIN CUSTOMER SALESMEN

1. In the ***Customer*** home page,
2. Click on the ***Maintain Customer Salesmen*** action button.



1. The ***Salesmen for [Customer]*** page will open.
2. Here you can view a list of all the company salespersons (currently set up on the system).
3. The names that have a ***ticked*** check box in front are currently linked to this customer.
4. To link another salesman, ***select*** the check box in front of that salesman's name.



When you have finished making the required changes,

Either,

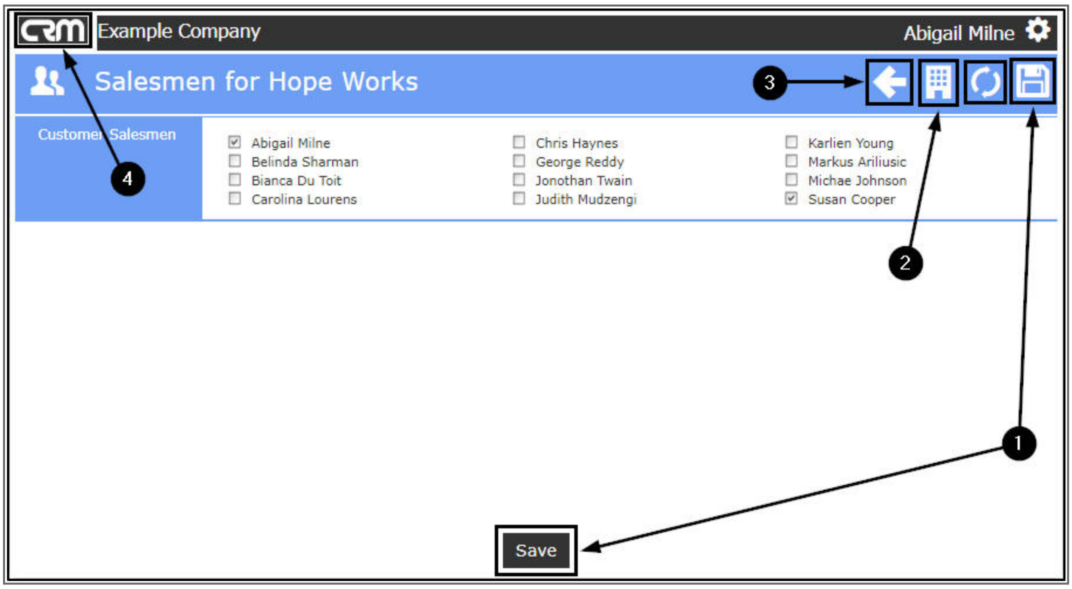
1. Click on ***Save***, your changes will be saved and you will return to the Customer home page.

   Or, if you do not wish to save your changes:
2. Click on ***Back*** to return to the previous page,

   or,
3. Click on the ***Customer icon*** to return to the Customer home page,

   or,
4. Click on the ***CRM logo*** to return to the Dashboard (Home page).

Note: You can view the customer salesmen by clicking on the Salesman Details tile in the Customer home page.

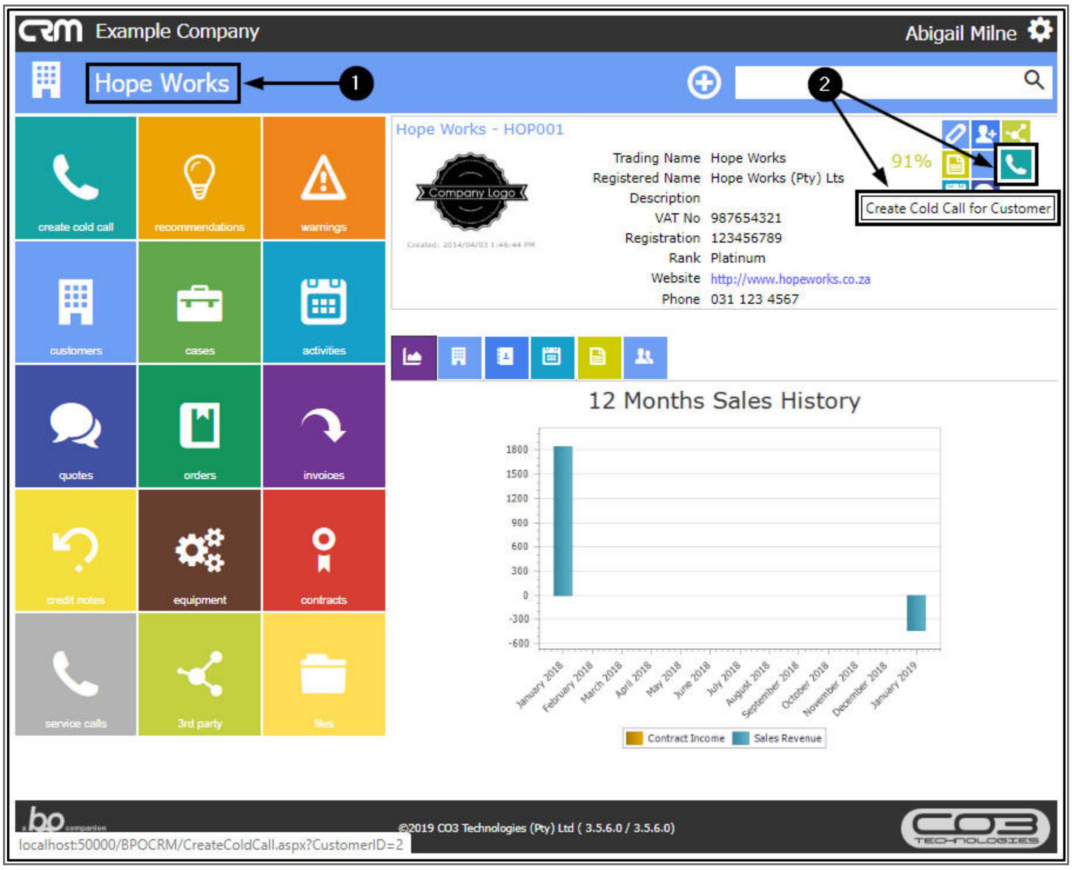


CUSTOMER DETAILS - ACTION ITEMS

CREATE COLD CALL FOR CUSTOMER

This will enable creating a cold call specifically for this customer.

1. In the ***Customer*** Home page,
2. Click on the ***Create Cold Call for Customer*** action button.



1. The Create Cold call page will open.
2. As this is a cold call created for this existing customer, you will note that the Customer frame will already be populated with this customer's details.
3. Complete the remaining cold call details as required. Refer to Creating a Cold Call for more information/directions.

When you have finished making the required changes,

Either,

4. Click on ***Save***, your cold call information will be saved and you will return to the Customer home page.

Or, if you do not wish to save your changes:

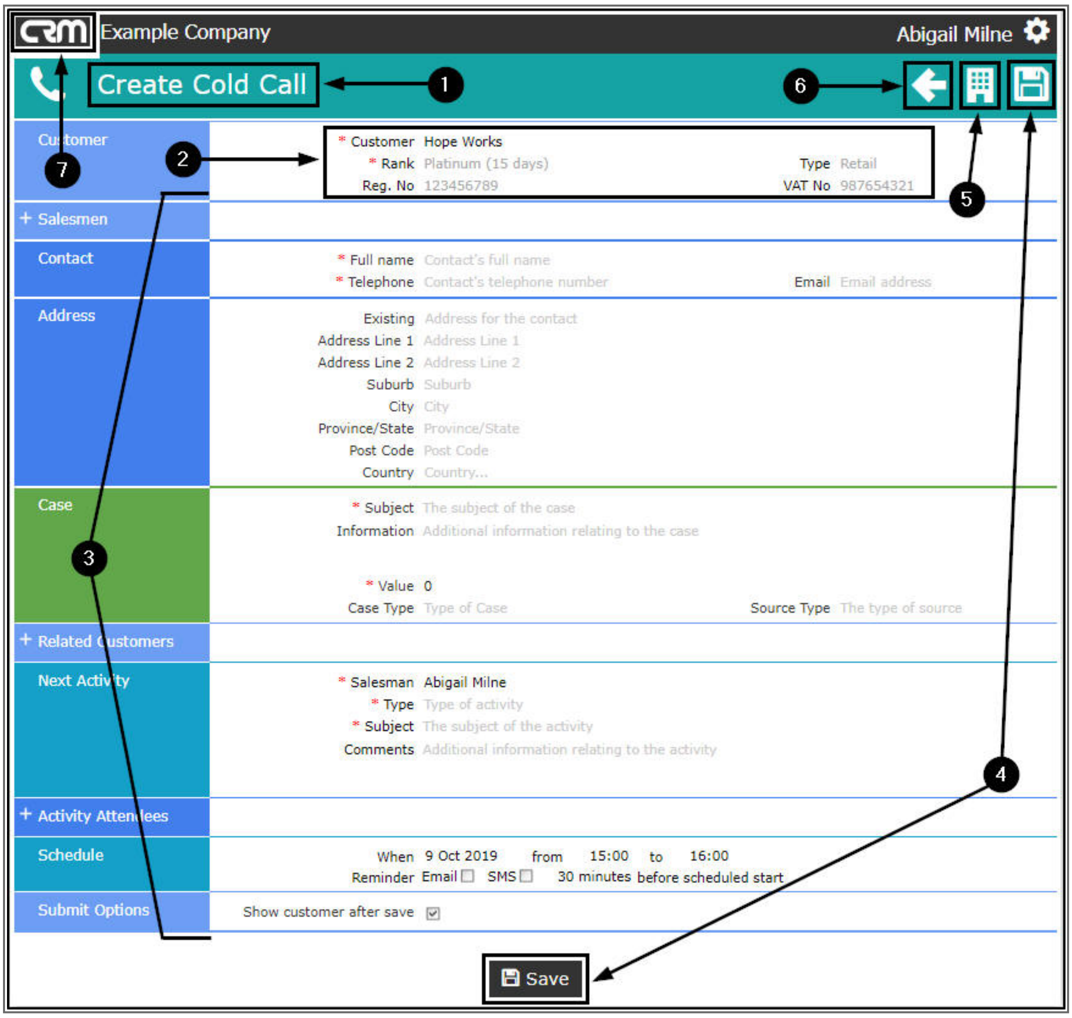
5. Click on the ***Customer icon*** to return to the Customer home page,

or,

6. Click on ***Back*** to return to the previous page,

   or,

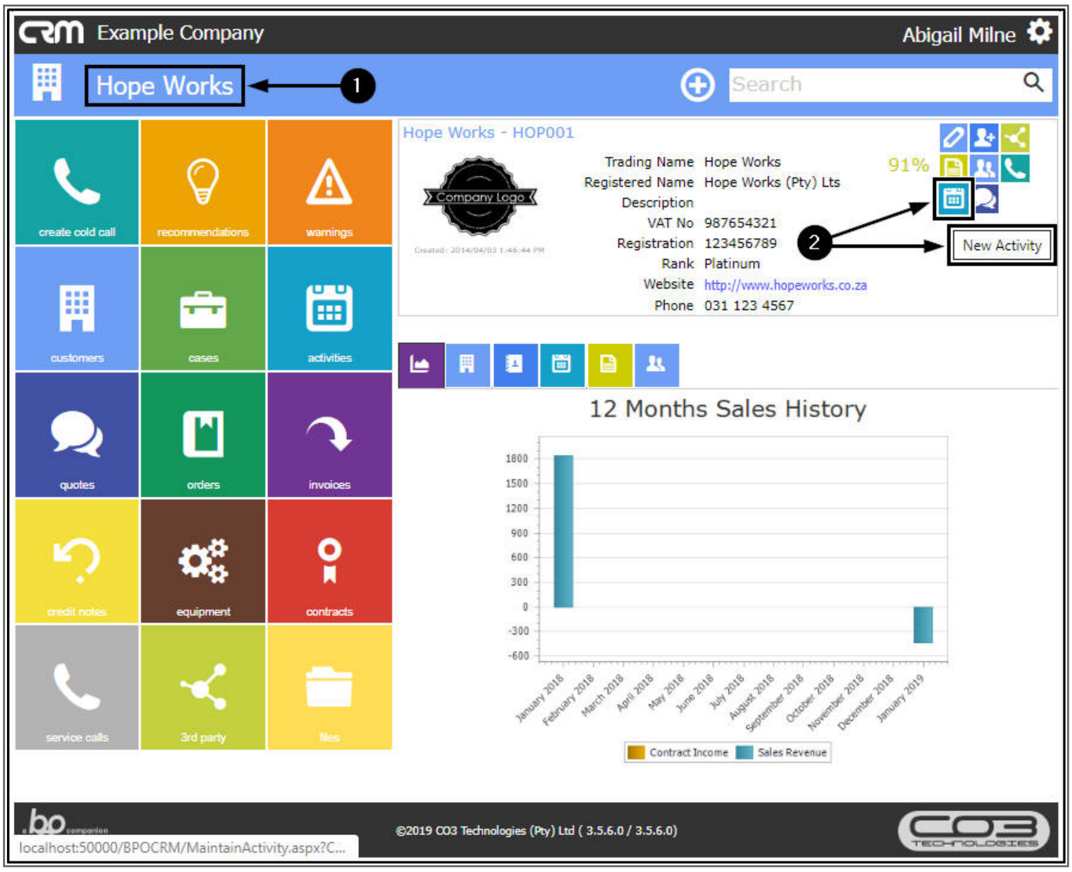
7. Click on the ***CRM logo*** to return to the Dashboard (Home page).



NEW ACTIVITY

This gives you the ability to add a new Case/Activity for the current customer.

1. In the ***Customer*** Home page,
2. Click on the ***New Activity*** action button.



1. The ***Save Activity*** page will open.
2. You will note that the ***Customer Name*** has auto populated in the ***Case*** frame.
3. Fill in the remaining ***Case***, ***Activity*** and ***Quote*** details, as required. Refer to Add/Edit an Activity for more information/directions.

When you have finished making the required changes,

Either,

4. Click on ***Save***, the new activity will be saved and you will return to the Customer home page.

Or, if you do not wish to save your changes:

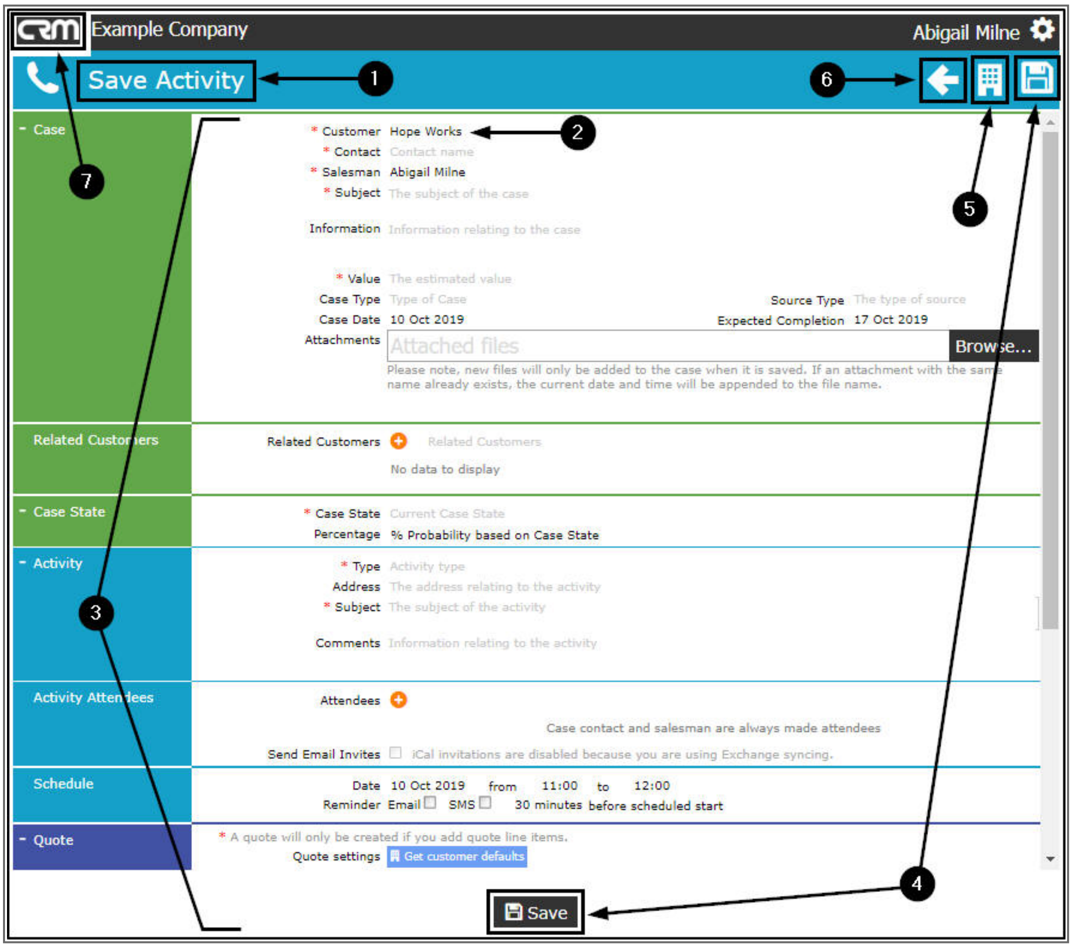
5. Click on the ***Customer icon*** to return to the Customer home page,

or,

6. Click on ***Back*** to return to the previous page,

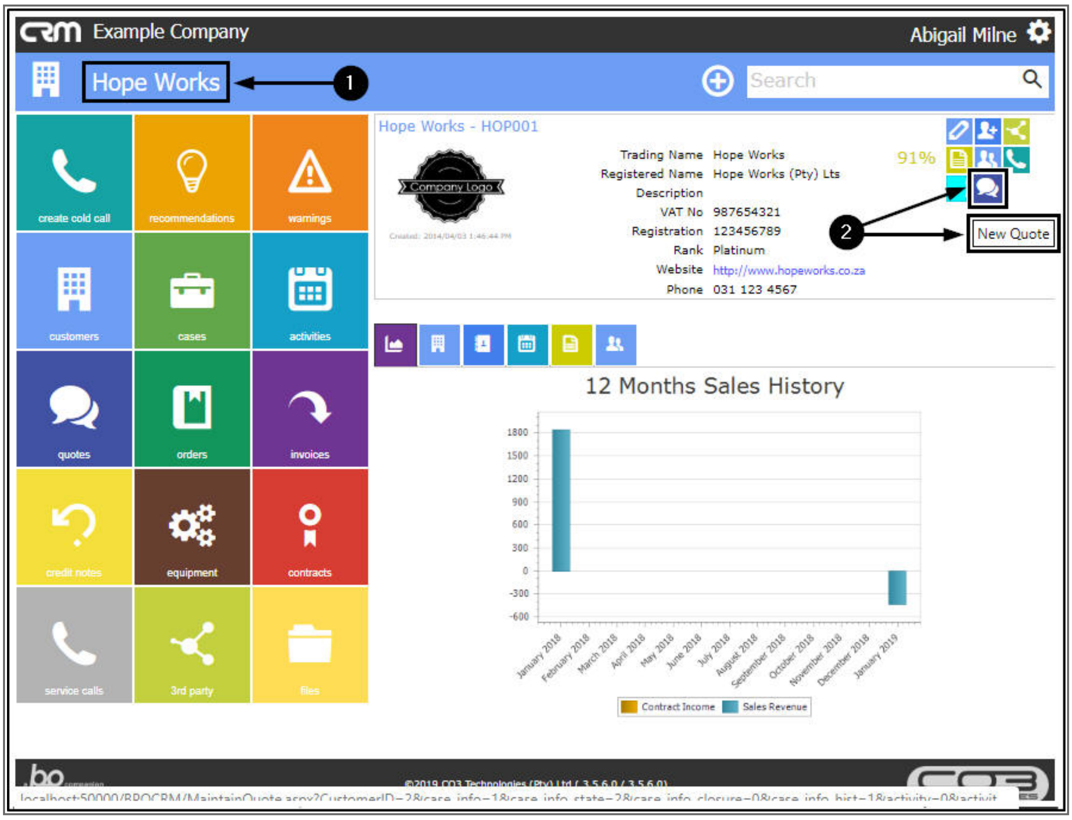
   or,

7. Click on the ***CRM logo*** to return to the Dashboard (Home page).



NEW QUOTE

1. In the ***Customer*** Home page,
2. Click on the ***New Quote*** action button.



1. The ***Save Quote*** page will open.
2. You will note that some of the details in this page have auto populated.
3. Fill in the remaining ***Case***, ***Quote***, ***Quote Financials*** and ***Quote Items*** details, as required. Refer to Add a New Quote for more information/directions.

When you have finished making the required changes,

Either,

4. Click on ***Save***, the new activity will be saved and you will return to the Customer home page.

Or, if you do not wish to save your changes:

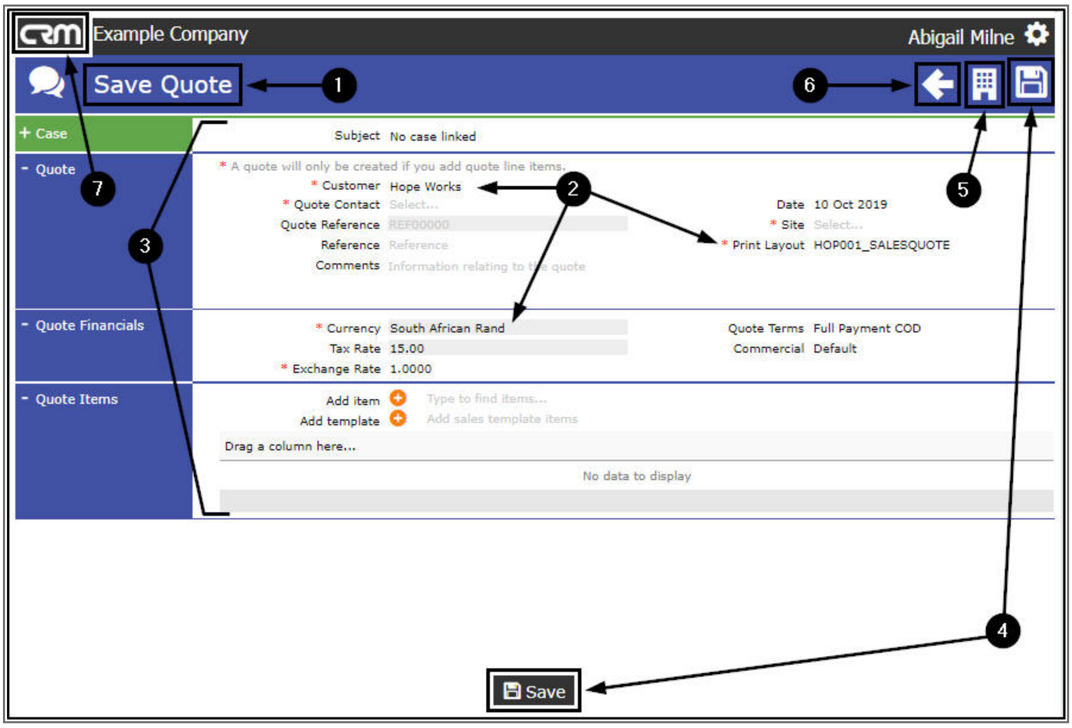
5. Click on the ***Customer icon*** to return to the Customer home page,

or,

6. Click on ***Back*** to return to the previous page,

or,

7. Click on the ***CRM logo*** to return to the Dashboard (Home page).



RELEASE CUSTOMER

Note: This ***Release*** action button is only available for a customer that is in status: New - CRM. Once the customer has moved from New - CRM to ***Released***, your accounts department can check/update all financial details and then either Approve or Decline the Customer (this will move the customer to the ***Active*** status if ***Approved*** or back to the ***New*** status if ***Declined***).

1. In the (New - CRM) ***Customer*** Home page,
2. Click on the ***Release Customer*** action button.

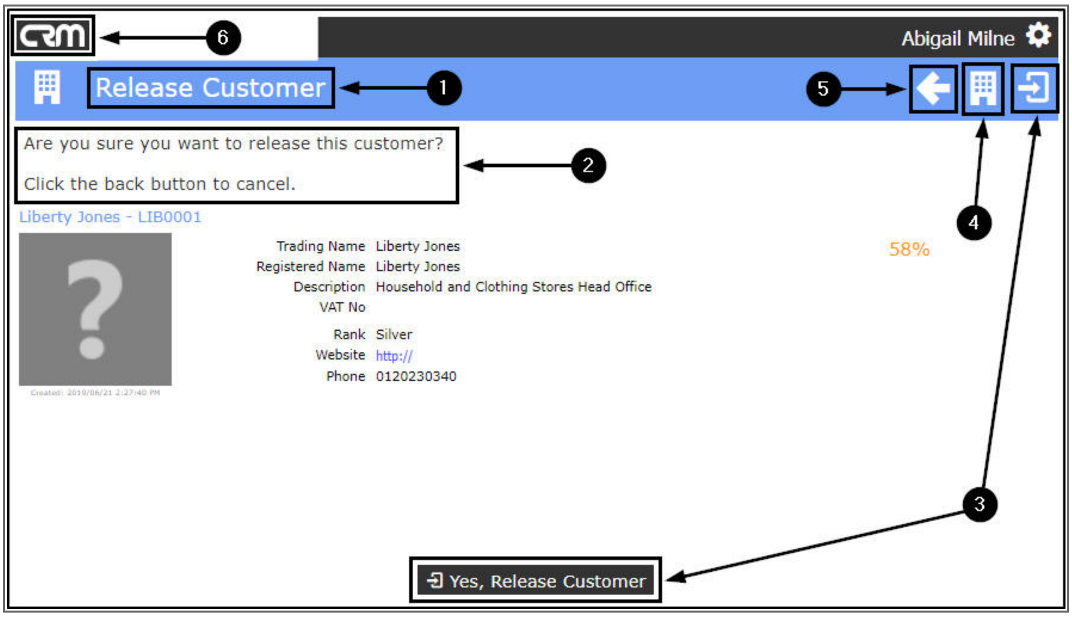
1. The Release Customer page will open.
2. A message will display on this page:
    - ***Are you sure you want to release this customer? Click the Back button to cancel.***

      Either,
3. Click on the ***Yes, Release Customer*** button or the ***Save*** button to release this customer.

   Or, if you do not wish to release this customer:
4. Click on the ***Customer icon*** to return to the Customer home page,

   or,
5. Click on ***Back*** to return to the previous page,

   or,
6. Click on the ***CRM logo*** to return to the Dashboard (Home page).



1. If you released the customer, you will return to the Customer Home page.
2. Note that the Release Customer button is no longer available.

This customer will now need to be Approved in BPO in order to become Active.


Example Company
Abigail Milne
Liberty Jones
1
Search
Liberty Jones - LIB0001
Trading Name Liberty Jones
Registered Name Liberty Jones
Description Household and Clothing Stores Head Office
VAT No
Rank Silver
Website http://
Phone 0120230340
58%
2
create cold call
recommendations
warnings
customers
cases
activities
quotes
orders
invoices
credit notes
equipment
contracts
service calls
3rd party
files
12 Months Sales History
Contract Income
Sales Revenue
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