

## CRM BASICS

### VIEW / PRINT / EMAIL A QUOTE

A full list of **Quotes** can be accessed from the Dashboard (Home page), or **customer-specific Quotes** can be accessed from the Customer Dashboard (Customer Home page).

Quotes in either of these pages can be: Viewed, Downloaded, Printed and Emailed.

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

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### LIST OF ALL QUOTES

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(linked to you as the Salesman) from the [Dashboard](#)

1. In the **Dashboard**,
2. Click on the **Quotes** tile.
3. The number in the top right of this tile shows the total number of **New**, **Accepted** and **Rejected** Quotes (for all customers) that are linked to you as the Salesman.

CRM Example Company Abigail Milne

Dashboard 1

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Phone call	20	2	2
Email	30	2	1
Meeting	20	0	2
On Site inspection	20	1	0
Site inspection	2	0	0

1 Month Performance

4 Month Pipeline

15 Oct 2019 19

75 8 7

13 147 8

2

3

create cold call recommendations warnings

customers cases activities

quotes equipment 3rd party

Today Recent Calendar Schedule Date Status

No data to display

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1. The **Quotes** listing page will open.
2. A list of **New**, **Accepted** and **Rejected** quotes for all customers on the system, where you are the Salesman, will be displayed.
3. Use the **Page Reference** field, or the **Filter Row** to search for a particular quote.

Follow the process to

- **View**,
  - **Download**,
  - **Print** or
  - **Email**
- the selected Quote, as required.

Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000206	HOP001	Hope Works	HW Q-0123	1380.00	ZAR	21 May 2018	New quote	Yes
QT0000207	HOP001	Hope Works	QAB11/10/2018	1398.40	ZAR	12 Oct 2018	New quote	Yes
QT0000209	HOP001	Hope Works	Q9001	506.00	ZAR	25 Feb 2019	Accepted quote	Yes
QT0000210	HOP001	Hope Works	HWQ000444	9616.16	ZAR	17 Jun 2019	New quote	Yes
QT0000211	KIN0002	King Enterprises	Q/KE/001	6815.62	ZAR	19 Jul 2019	Accepted quote	Yes
QT0000212	KIN0001	King Copiers	Q/KC/9002	13025.62	ZAR	30 Jul 2019	New quote	Yes
QT0000213	TRA0001	Training Wheels	TW001	31050.00	ZAR	14 Oct 2019	Accepted quote	Yes
QT0000214	HOP001	Hope Works	HW/Q199	7436.62	ZAR	24 Oct 2019	Rejected quote	Yes
QT0000215	KIN0001	King Copiers	KCQU101	13025.62	ZAR	31 Oct 2019	New quote	No
QT0000218	HOP001	Hope Works		6210.00	ZAR	12 Nov 2019	New quote	No

## CUSTOMER SPECIFIC QUOTES

1. In the *Dashboard*,
2. Click on the *Customers* tile.
3. The number in the top right of this tile shows the total number of *Customers*, on the System.

1. The **Customers** listing page will open.
2. You can use the **Page Reference field**,
3. the **Filter Row** or
4. the **Filter Text Box** to **search** for your customer.
5. Click on the selected **Customer icon** in the **View** column.

The screenshot shows a CRM interface for 'Example Company' with the user 'Abigail Milne'. The 'Customers' dashboard is active. A search bar is present with the placeholder text 'Type Customer name search filter here...'. Below the search bar is a table with the following columns: View, Customer, Code, Contact, Contact phone, Contact email, Comple, Status, Rank, Active, and Call Contact. The table contains 12 rows of customer data. At the bottom of the table, there is a pagination control showing 'Page 5 of 8 (74 items)' and a 'Page size: 10' dropdown.

View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
?	Maggies Clothing Shop	MAG0001	Maggie Smith			33%	Released	Gold	No	Yes
?	Mandy Norton	MAN0001				8%	Active		No	No
?	Marks Building Supplies	MAR0001				8%	Active		No	No
?	Mary Contrary	HIL000001				8%	Active		No	No
?	Maxi Mobile	MAX0001	George Lanchester	031 123 456		41%	Active		No	Yes
?	Mike Goldwen	SHO00000				8%	Released	Plastic	No	No
?	Milne Associates	MIL0001	Mark	0123405678		50%	New - CRM	Wood	No	Yes
?	Most Wonderful Customer	MOS0001	Wonder Boy			25%	Released		No	Yes
?	Network and Accessories	NET002				16%	Active	Gold	No	No
?	Networking and Laptops	NET001	John Jackson			50%	Active	Metal	No	Yes

1. The **Customer Dashboard** (Customer Home page) will open.
2. Click on the **Quotes** tile.

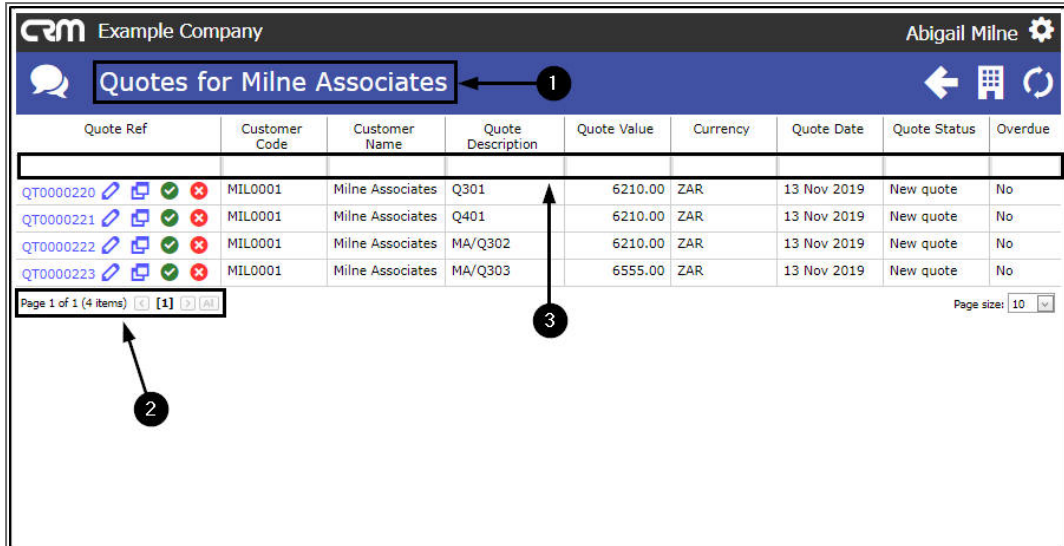
The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main header displays 'Milne Associates' with a search bar. Below this, there are three charts: 'Activities for Last 30 Days', '1 Month Performance', and '4 Month Pipeline'. The 'Activities for Last 30 Days' table is as follows:

Description	Target	Existing Custmrs	New Custmrs
Phone call	20	2	2
Email	30	2	1
Meeting	20	0	2
On Site Inspection	20	1	0
Site inspection	2	0	0

The '1 Month Performance' chart shows data for Cases, Invoices, Orders, and Quotes. The '4 Month Pipeline' chart shows data for Nov 2019, Dec 2019, Jan 2020, and Feb 2020. A central panel displays customer details for 'Milne Associates - MIL0001', including Trading Name, Registered Name, Description, VAT No, Rank (Wood), Website (http://), and Phone (0123405678). A '12 Months Sales History' chart is also visible, showing Contract Income and Sales Revenue from January 2018 to January 2019. A navigation grid on the left includes icons for create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files. A red circle '1' points to the 'Milne Associates' header, and a red circle '2' points to the 'quotes' icon in the navigation grid.

1. The **Quotes for [selected customer]** page will open.
  - All of the quotes linked to this customer will be displayed (even ones where you are not the Salesman).
2. You can use the **Page Reference field** or the
3. **Filter Row** to search for a particular Quote.

Follow the process to **View, Download, Print** or **Email** the selected Quote, as required.



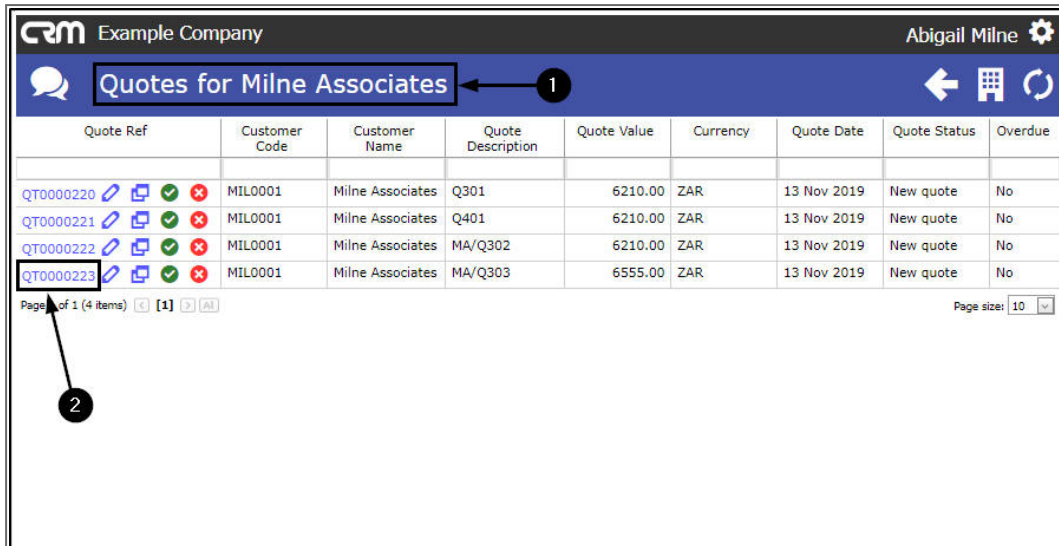
Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000220	MIL0001	Milne Associates	Q301	6210.00	ZAR	13 Nov 2019	New quote	No
QT0000221	MIL0001	Milne Associates	Q401	6210.00	ZAR	13 Nov 2019	New quote	No
QT0000222	MIL0001	Milne Associates	MA/Q302	6210.00	ZAR	13 Nov 2019	New quote	No
QT0000223	MIL0001	Milne Associates	MA/Q303	6555.00	ZAR	13 Nov 2019	New quote	No

Page 1 of 1 (4 items) [1] [2] [3] Page size: 10

## VIEW A QUOTE

In either the Quotes listing page or the Quotes for [selected customer] page you can search for and **View**, **Download**, **Print** or **Email** a selected Quote. For the purpose of this manual, we will start from the Quotes for [selected customer] page.

1. In the **Quotes for [selected customer]** page,
2. Click on the blue **number** of the Quote that you wish to **View**, **Download**, **Print** or **Email**.



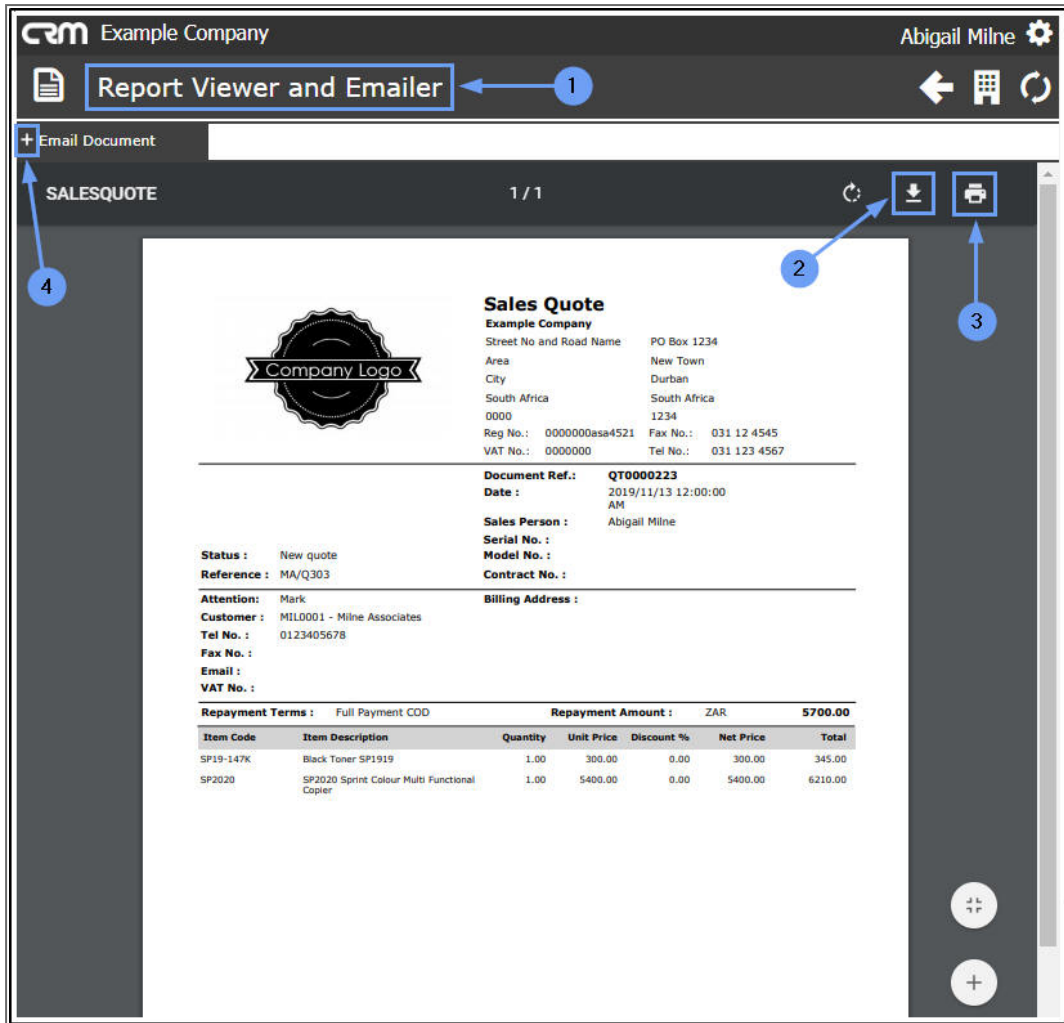
Quote Ref	Customer Code	Customer Name	Quote Description	Quote Value	Currency	Quote Date	Quote Status	Overdue
QT0000220	MIL0001	Milne Associates	Q301	6210.00	ZAR	13 Nov 2019	New quote	No
QT0000221	MIL0001	Milne Associates	Q401	6210.00	ZAR	13 Nov 2019	New quote	No
QT0000222	MIL0001	Milne Associates	MA/Q302	6210.00	ZAR	13 Nov 2019	New quote	No
QT0000223	MIL0001	Milne Associates	MA/Q303	6555.00	ZAR	13 Nov 2019	New quote	No

Page 1 of 1 (4 items) [1] Page size: 10

1. The **Report Viewer and Emailer** page will open.
  - The selected quote will be displayed in Report format.
2. You can **download** and/or
3. **Print** the Sales Quote, if required.

## EMAIL QUOTE

4. Click on the expand [ + ] sign on the **Email Document** tab.



1. The **Email Document** frame will be expanded.

Check and/or add the following details, as necessary:

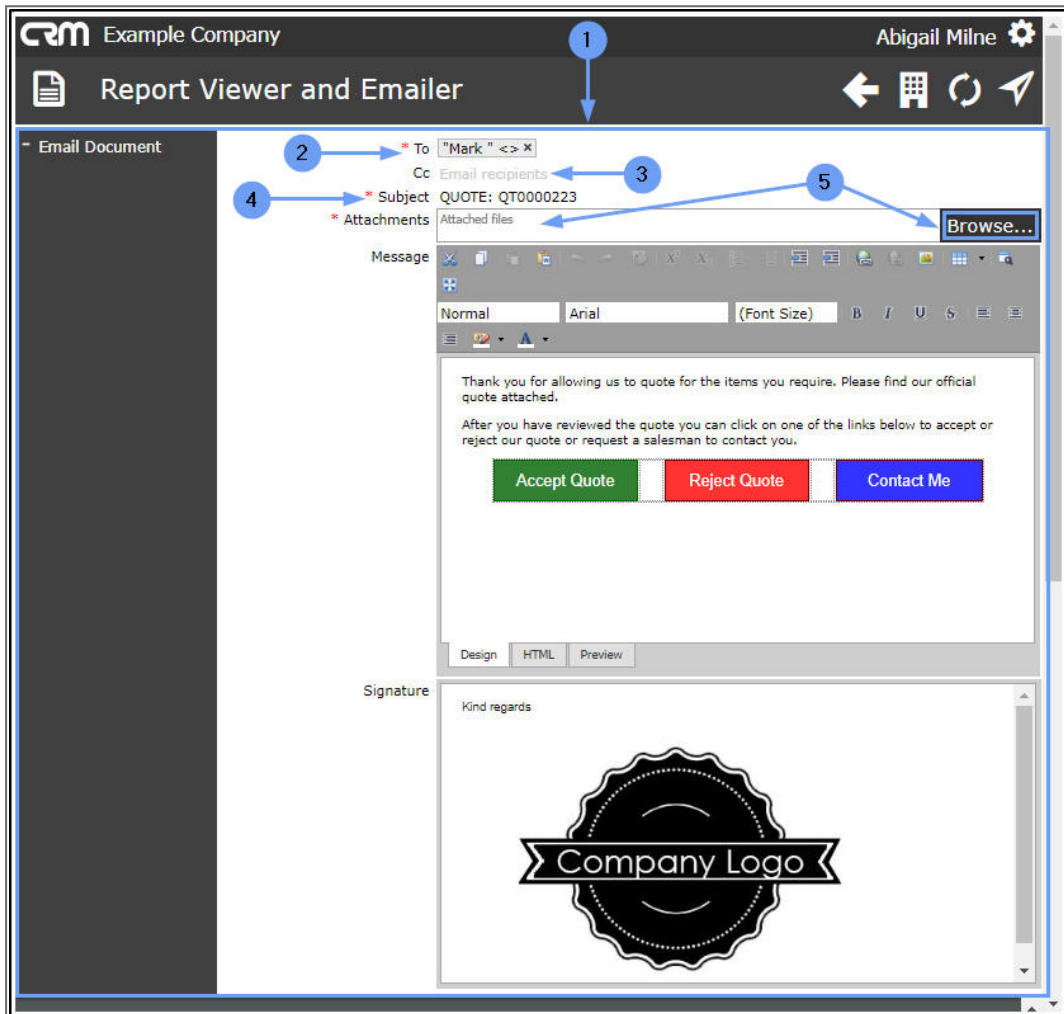
2. **To:** This will auto populate with the CRM contact for the quote (case) but you can change this, if required.
3. **Cc:** Here, you can add other email recipients, if applicable.
  - Either click in the field and select customer contacts from the list, or type in additional addresses as noted above (separated by a semi-colon and a space).

4. **Subject:** This field will auto populate with the selected quote number but you can edit this, if required.

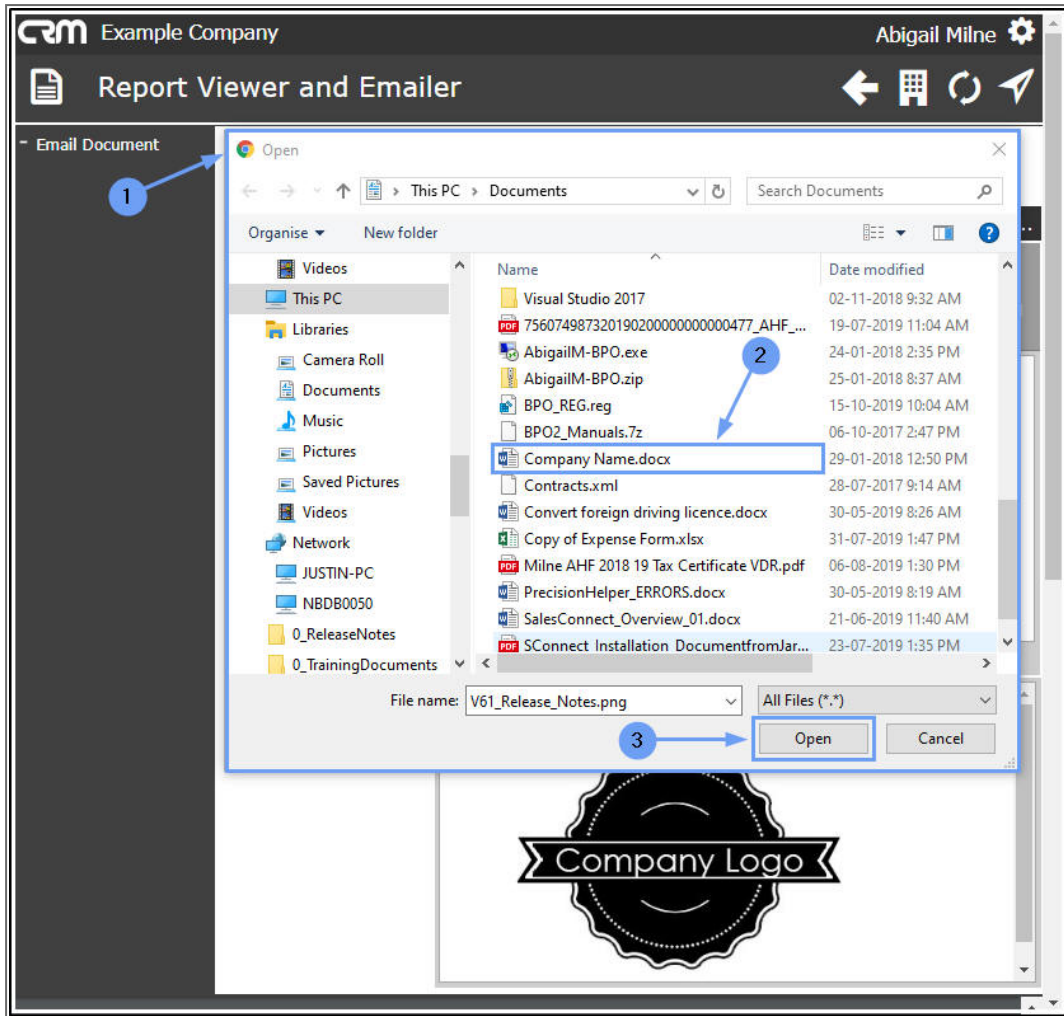
## ADD AN ATTACHMENT TO THE QUOTE

You can add other documents, as attachments, if required.

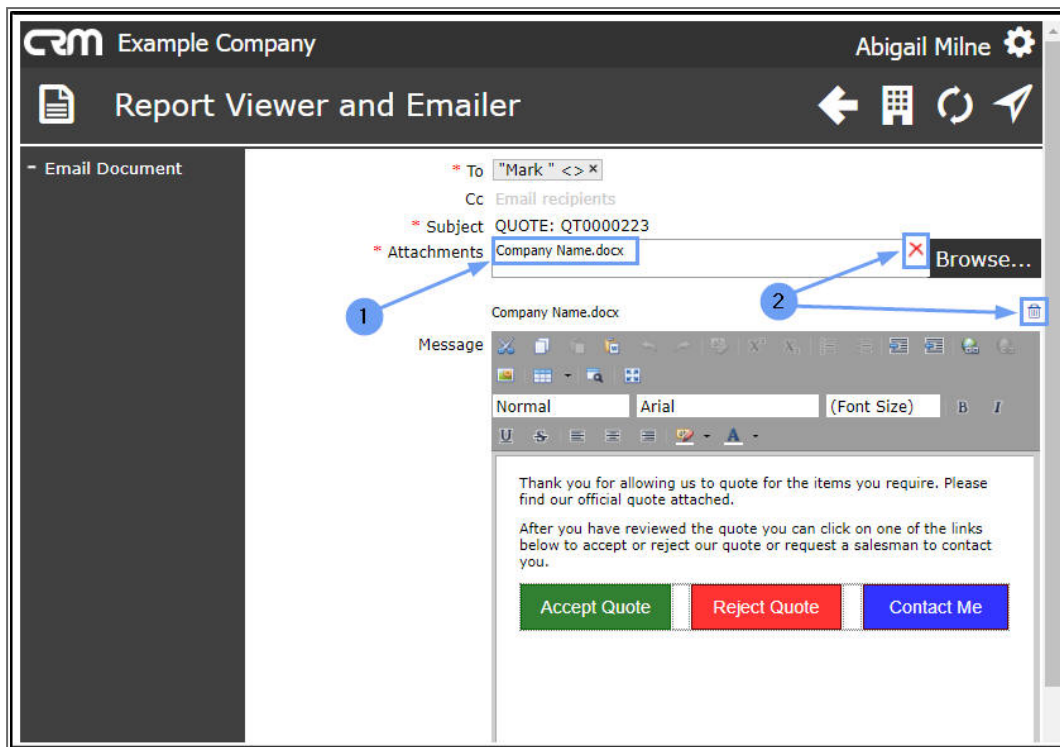
5. **Attachments:** Click on *Browse*.



1. The *Open* screen will pop up.
2. Search for and select the file you wish to link.
3. Click on *Open*.



1. The file will now be attached to the email.
2. You can delete the attachment if required by clicking on either of the **Delete** icons.



1. A default message will populate the **Message body** but this can be edited, if required.
  - Type in the relevant details in the message body.
2. The **Message tool bar** can be used to customise your email message.

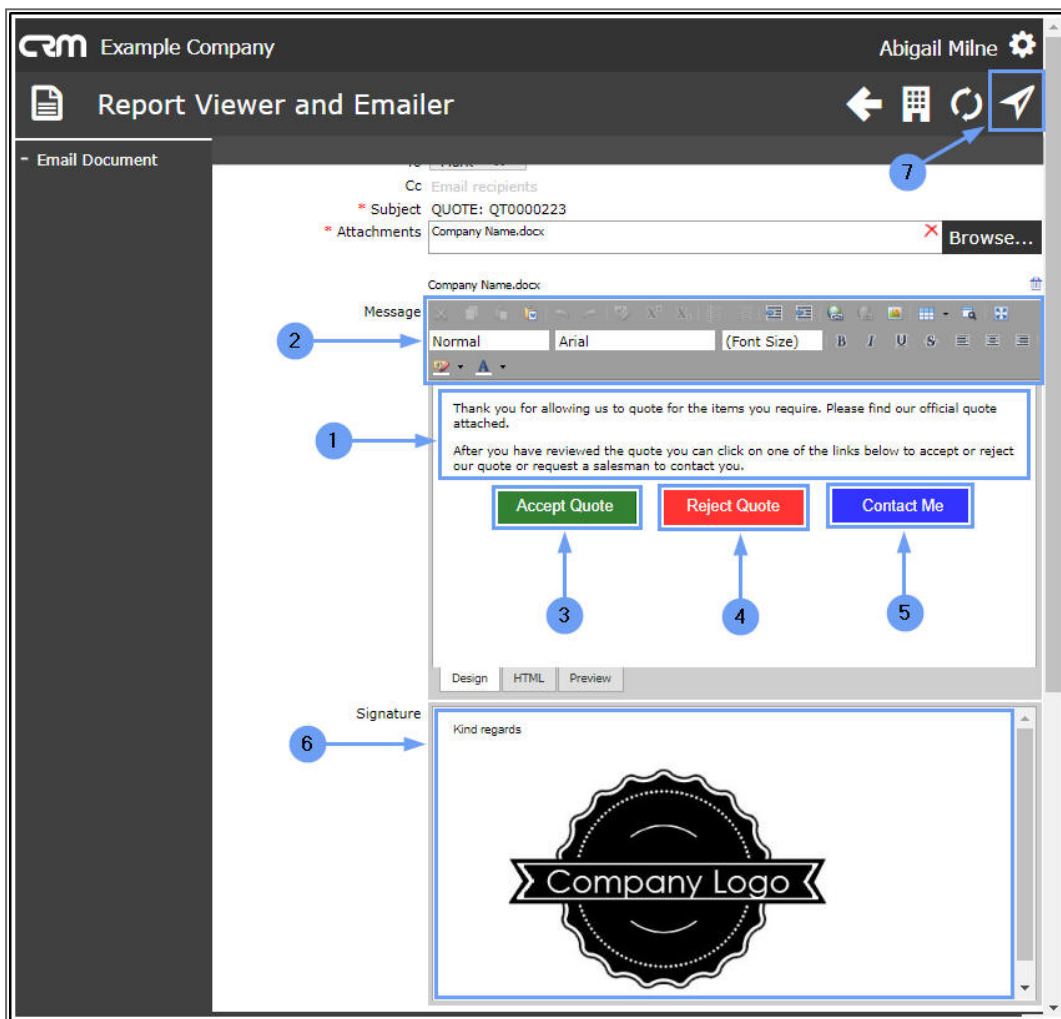
## EMAIL ACTION BUTTONS

The message body contains **3Action** buttons that allow the recipient to:

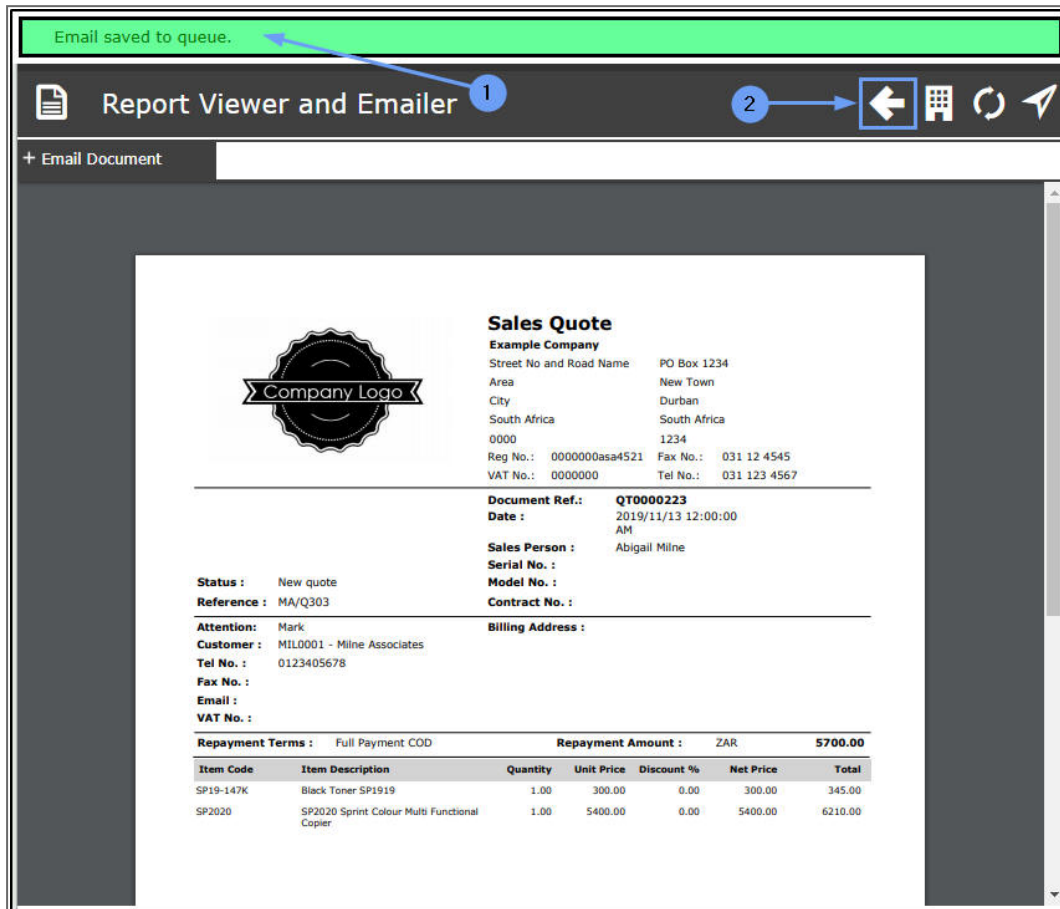
3. **Accept Quote:** If the client selects Accept - the Quote Status will be updated and a quote status notification email will be sent to the salesman (where the Quote Status Notification email flag is set to Yes). The quote will automatically be **marked as accepted** in the **Quotes / Quotes for [ ]** screen.
4. **Reject Quote:** If the client selects Reject - the Quote Status will be updated and a quote status notification email will be sent to the

salesman (where the Quote Status Notification email flag is set to Yes). The quote will automatically be **marked as rejected** in the **Quotes / Quotes for [ ]** screen.

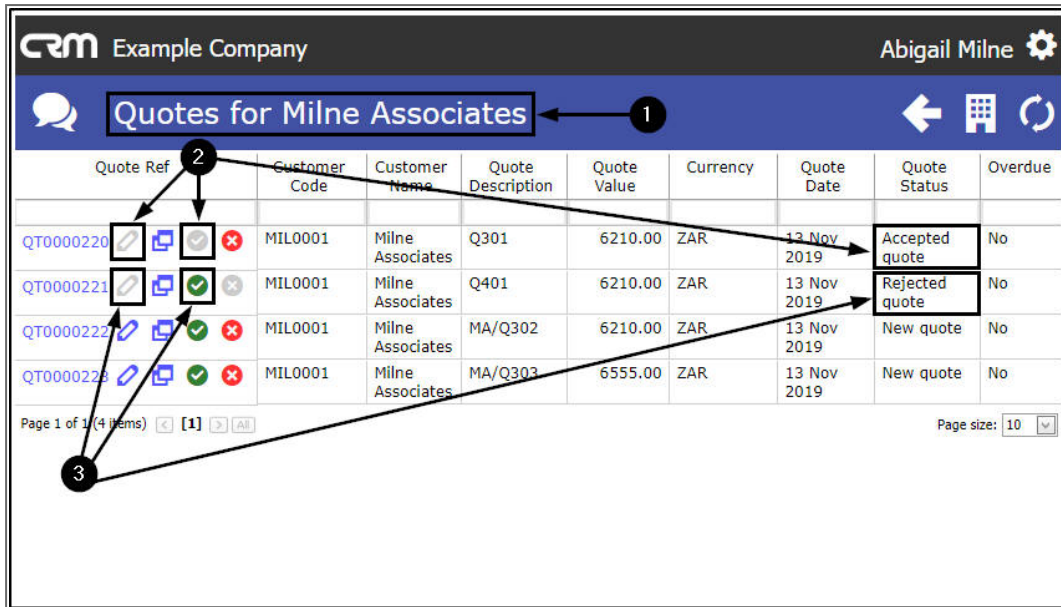
5. **Contact Me:** If the client selects to be contacted - the quote status will remain unchanged. An email will be sent to the salesman requesting that he/she follow up with the client.
6. **Signature:** If you have a **Signature configured in CRM** - your Signature will pull through here, otherwise the **Company default CRM mail signature** will pull through.
7. Click on the **Send** icon.



1. A message box will pop up informing you of the status of the sent email.
2. Click on **Back**.



1. You will return to the **Quotes for [selected customer]** listing page.
2. If, on receipt of your email, your customer selected to **Accept the Quote**, then the **Edit** icon and the **Mark as Accepted** icon will now be Inactive (greyed out) and the Quote Status will have changed to **Accepted Quote**.
3. If, on receipt of your email, your customer selected to **Reject the Quote**, then the **Edit** icon and the **Mark as Rejected** icon will now be Inactive (greyed out) and the Quote Status will have changed to **Rejected Quote**.



1. Click on **Back** to return to the previous page or
2. Click on the **Customers** icon to return to the **Customer Dashboard** or
3. Click on the **CRM logo** to return to the **Dashboard** (Home page).



CRM.015.002

