

We are currently updating our site; thank you for your patience.

## CRM BASICS

### CONTRACTS

A **Contracts** tile has been added to the CRM Homepage. This button will navigate to the **Contracts listing** page which will display all contracts for the user's customers, irrespective of the contract salesman.

This is useful from a salesman's point of view:

- to show active contracts to encourage the salesman to maintain good relationship with the customers linked to those contracts.
- to alert the salesman to any expiring contracts so that he can pay particular attention to the customers that are coming to the end of their contract to try to make sure that those contracts are renewed.

Selecting a Customer Name, Code or Contract No. in this Contracts listing page will direct the salesman to the **Contract Performance Report**.

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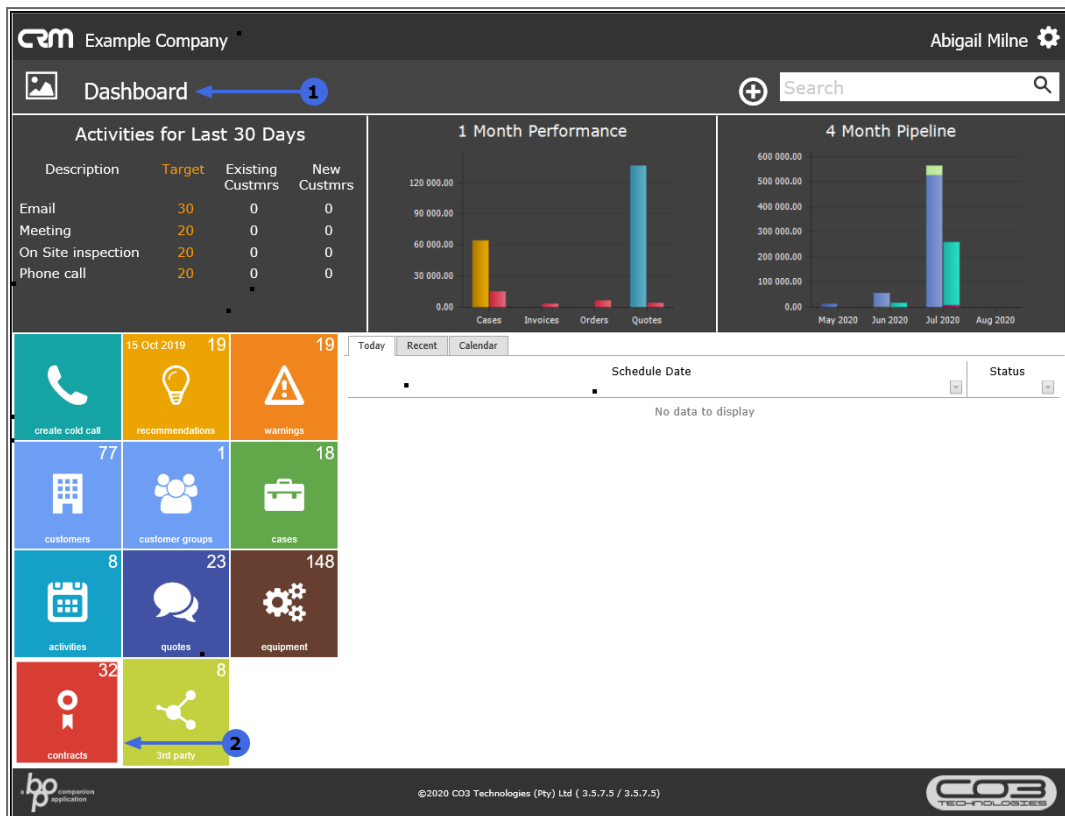
**Ribbon Access:** Webpage > `http://[servername]:[port-no]/BPOCRM/User.aspx`

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### VIEW CONTRACTS LISTING PAGE

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



1. The **Contracts for [Salesman's Name] Customers** listing page will be displayed.
2. Here you can view all the contracts for all the user's customers, irrespective of the contract salesman.

CRM

Example Company

Abigail Milne

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Contracts for Abigail Milne's Customers

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| Contract No | Customer Code | Customer Name             | Salesman Name   | Start Date  | Expiry Date | Months Remaining |
|-------------|---------------|---------------------------|-----------------|-------------|-------------|------------------|
|             | 2             |                           |                 |             |             |                  |
| CO0000009   | DER001        | Derton Technologies       | Chris Haynes    | 07 May 2014 | 07 May 2019 | -12              |
| CO0000012   | TIA001        | Titan Group               | Belinda Sharman | 16 May 2014 | 16 Jun 2014 | -71              |
| CO0000016   | TIA001        | Titan Group               | Belinda Sharman | 13 Jun 2014 | 13 Jun 2019 | -11              |
| CO0000018   | SAM001        | Samanthas Diner           | Belinda Sharman | 09 Jul 2014 | 09 Jul 2019 | -10              |
| CO0000019   | OFF001        | Office Supplies Unlimited | Belinda Sharman | 28 Jul 2014 | 28 Jul 2019 | -10              |
| CO0000020   | HOP001        | Hope Works                | Chris Haynes    | 01 Jan 2011 | 01 Jan 2016 | -52              |
| CO0000022   | SAM001        | Samanthas Diner           | Bianca Du Toit  | 05 Aug 2014 | 05 Aug 2019 | -9               |
| CO0000028   | HAC001        | Hack PC - IT Shop         | Bianca Du Toit  | 29 Jun 2015 | 29 Jun 2020 | 1                |
| CO0000031   | YES001        | Young Electric            | Bianca Du Toit  | 24 Mar 2016 | 24 Mar 2021 | 10               |
| CO0000038   | SAM001        | Samanthas Diner           | Belinda Sharman | 23 Jun 2016 | 23 Jun 2021 | 13               |

Page 1 of 4 (32 Items)

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Create Filter

## VIEW CONTRACT PERFORMANCE REPORT

1. In the **Contracts for [Salesman's Name]Customers** listing page,
2. Click on either the **Customer Name**, **Customer Code** or **Contact No.** in the row of the Contract that you wish to view.

CRM

Example Company

Abigail Milne

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Contracts for Abigail Milne's Customers

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| Contract No | Customer Code | Customer Name       | Salesman Name   | Start Date  | Expiry Date | Months Remaining |
|-------------|---------------|---------------------|-----------------|-------------|-------------|------------------|
| CO0000062   | HOP001        | Hope Works          | Bianca Du Toit  | 14 Dec 2018 | 14 Dec 2023 | 43               |
| CO0000063   | Red0001       | Redhead Building    | Belinda Sharman | 07 Feb 2019 | 07 Feb 2024 | 45               |
| CO0000064   | HOP001        | Hope Works          | Belinda Sharman | 06 Mar 2019 | 06 Mar 2024 | 46               |
| CO0000065   | HOP001        | Hope Works          | Belinda Sharman | 02 Apr 2019 | 02 Apr 2024 | 47               |
| REN0000200  | HOP001        | Hope Works          | Abigail Milne   | 29 Jan 2020 | 29 Feb 2020 | -3               |
| STC0000019  | DER001        | Derton Technologies | Bianca Du Toit  | 22 Apr 2016 | 24 Apr 2016 | -49              |
| STC0000021  | APP0001       | Apple Juice Inc     | Bianca Du Toit  | 08 Jun 2017 | 10 Jun 2017 | -35              |
| STC0000022  | ABCXYZ123     | ABC SHoe Co         | Bianca Du Toit  | 26 Jun 2017 | 27 Jun 2017 | -35              |
| STC0000024  | APP0001       | Apple Juice Inc     | Bianca Du Toit  | 10 Aug 2017 | 20 Aug 2017 | -33              |
| STC0000027  | HOP001        | Hope Works          | Bianca Du Toit  | 09 Jul 2018 | 10 Jul 2018 | -22              |

Page 3 of 4 (32 Items)

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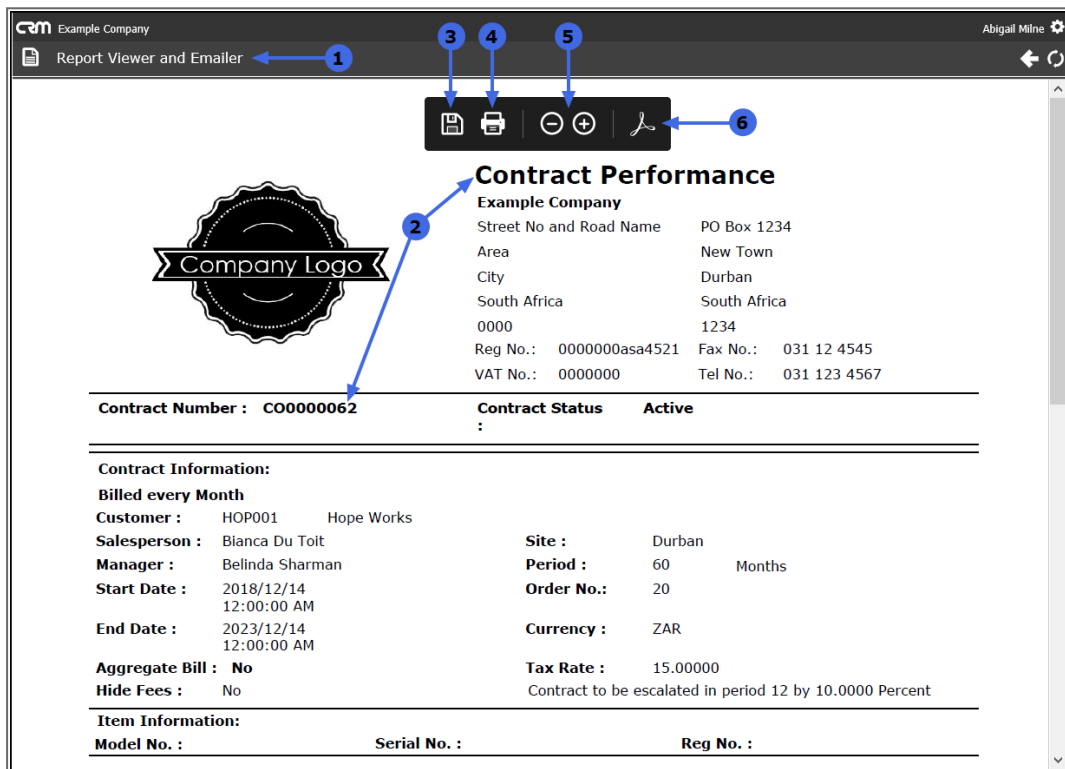
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Create Filter

1. The **Report Viewer and Emailer** page will open.
2. Here you can view the **Contract Performance Report** for the selected contract.

The Following functionality applies in this report page:

3. **Save:** Save a Copy of the report.
4. **Print:** Print a copy of the report.
5. **Zoom** in and out of the report.
6. **Adobe:** Show Adobe Acrobat Reader toolbar. Click on this button.



The screenshot shows a web application interface for 'Example Company'. At the top, a navigation bar includes a 'Report Viewer and Emailer' link (callout 1) and a user profile 'Abigail Milne'. Below the navigation bar is a toolbar with icons for saving (callout 3), printing (callout 4), zooming (callout 5), and showing the Adobe Acrobat Reader toolbar (callout 6). The main content area displays the 'Contract Performance' report for 'Example Company'. It includes a 'Company Logo' (callout 2) and a table of contract details. The contract number is CO0000062, and the status is Active. The report is billed every month and includes customer, salesperson, manager, start/end dates, aggregate bill, and hide fees information. It also lists site, period, order number, currency, and tax rate details.

| Contract Information: |                        |
|-----------------------|------------------------|
| Billed every Month    |                        |
| Customer :            | HOP001 Hope Works      |
| Salesperson :         | Blanca Du Toit         |
| Manager :             | Belinda Sharman        |
| Start Date :          | 2018/12/14 12:00:00 AM |
| End Date :            | 2023/12/14 12:00:00 AM |
| Aggregate Bill :      | No                     |
| Hide Fees :           | No                     |

| Contract Information:                                    |           |
|----------------------------------------------------------|-----------|
| Site :                                                   | Durban    |
| Period :                                                 | 60 Months |
| Order No.:                                               | 20        |
| Currency :                                               | ZAR       |
| Tax Rate :                                               | 15.00000  |
| Contract to be escalated In period 12 by 10.0000 Percent |           |

| Item Information: |              |           |
|-------------------|--------------|-----------|
| Model No. :       | Serial No. : | Reg No. : |

1. The **Adobe Acrobat Reader toolbar** will be displayed. Apply the toolbar functionality if and as required.
2. Click on **Back** to return to the Contracts listing page or the **CRM Home** button to return to the Homepage.



