Customer Relation

Customer Relation manual

Introduction

CRM dashboard can be found under "Work" menu

home-crm-en.png

Dashboard

Following is an example dashboard

There are several major sections; Customer, Quote, Order/Return, Work-order, Invoice/Credit, Charge, Inventory, RMA, Report, Tool.

Some sections may not be available from customization

crm-en.png

Customer

Introduction

Following shows a sample window.

The chapter describes features available within the window.

crm-customer-en.png

Create customer

Click "New customer" on upper right corner of customer table

finance-customer-en.png

Enter customer data, then click "Create".

modal-new-customer-en.png

Update Customer

Click "Update" button on the right of customer

finance-customer-en.png

Update information, then click "Update".

customer-update-modal-en.png

View Customer

Click "View" button on the right of customer

finance-customer-en.png

Customer modal appears

receivable-customer-view-modal-en.png

Customer Performance

Click "View" button on the right of receivable

finance-customer-en.png

Performance modal appears

customer-performance-en.png

Quote

Introduction

Following shows a sample window.

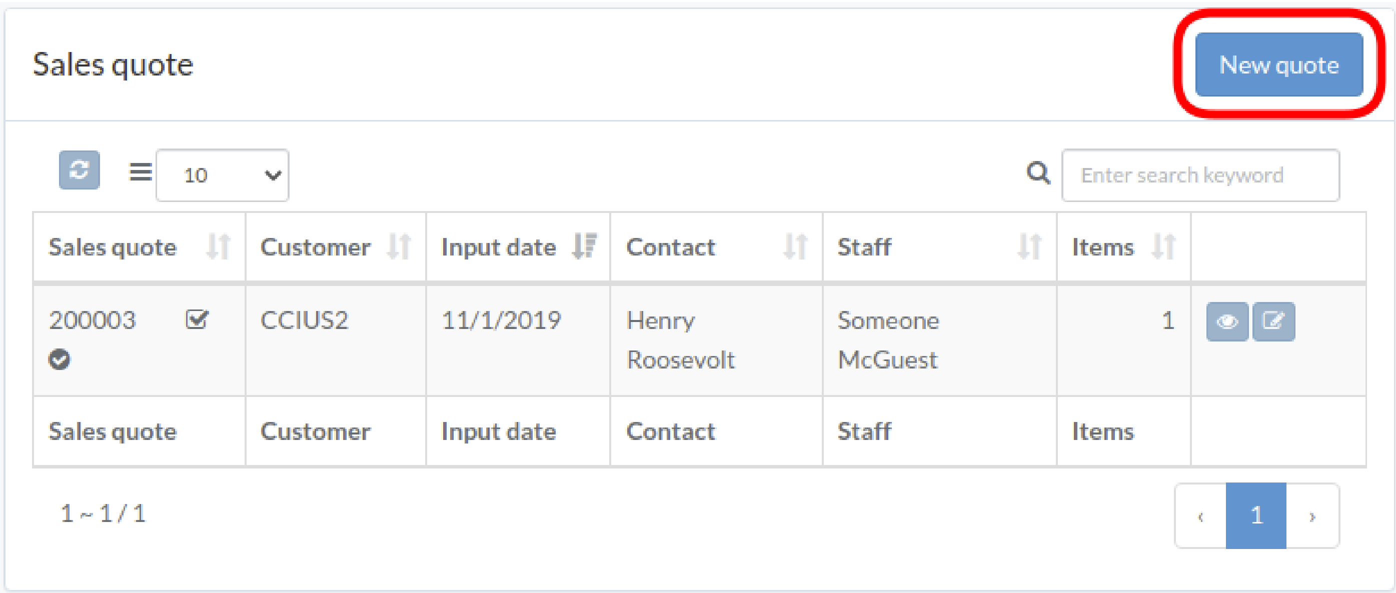
The chapter describes features available within the window.

crm-quote-en.png

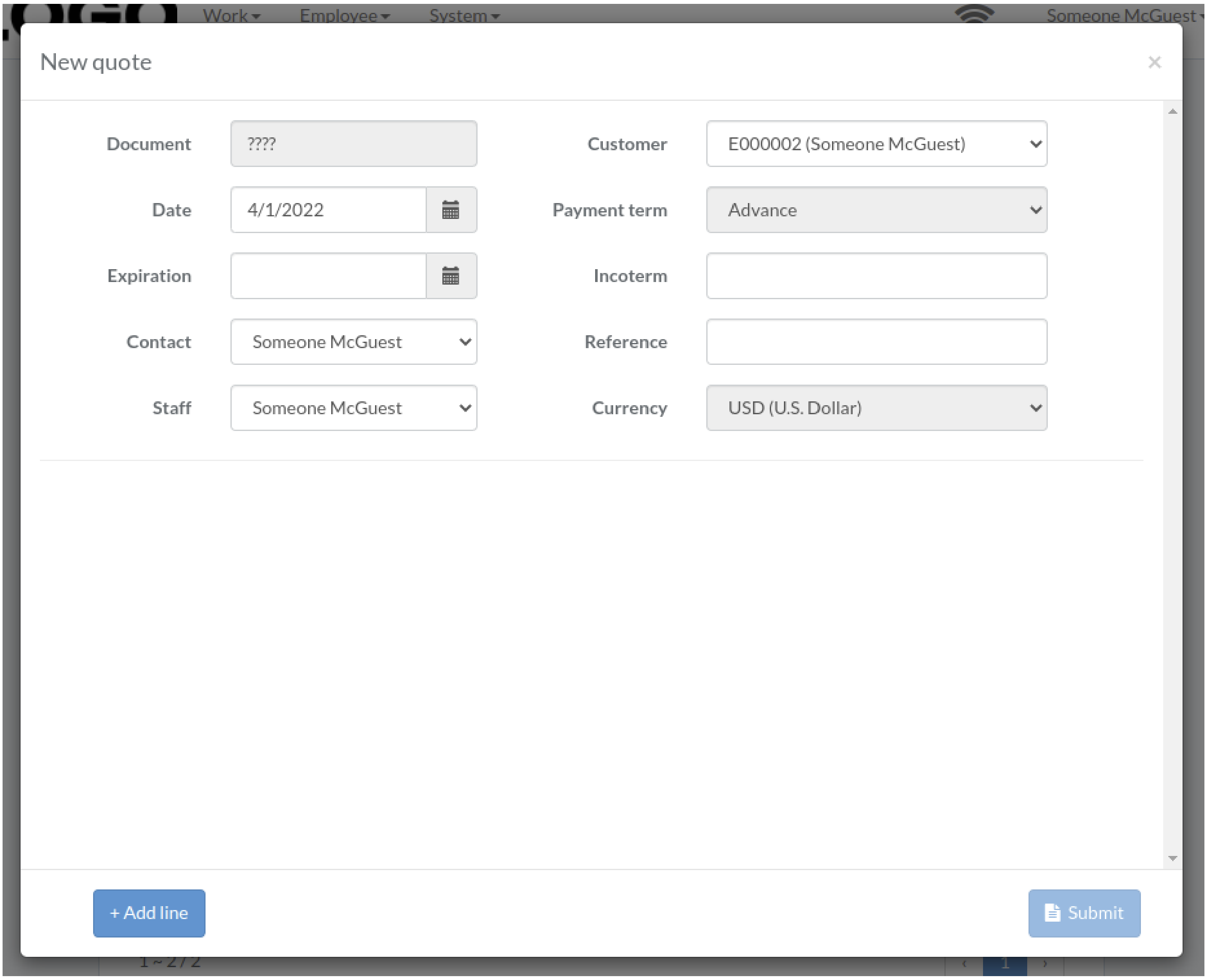
Quote

Create quote

Click "New quote" on upper right corner of quote table



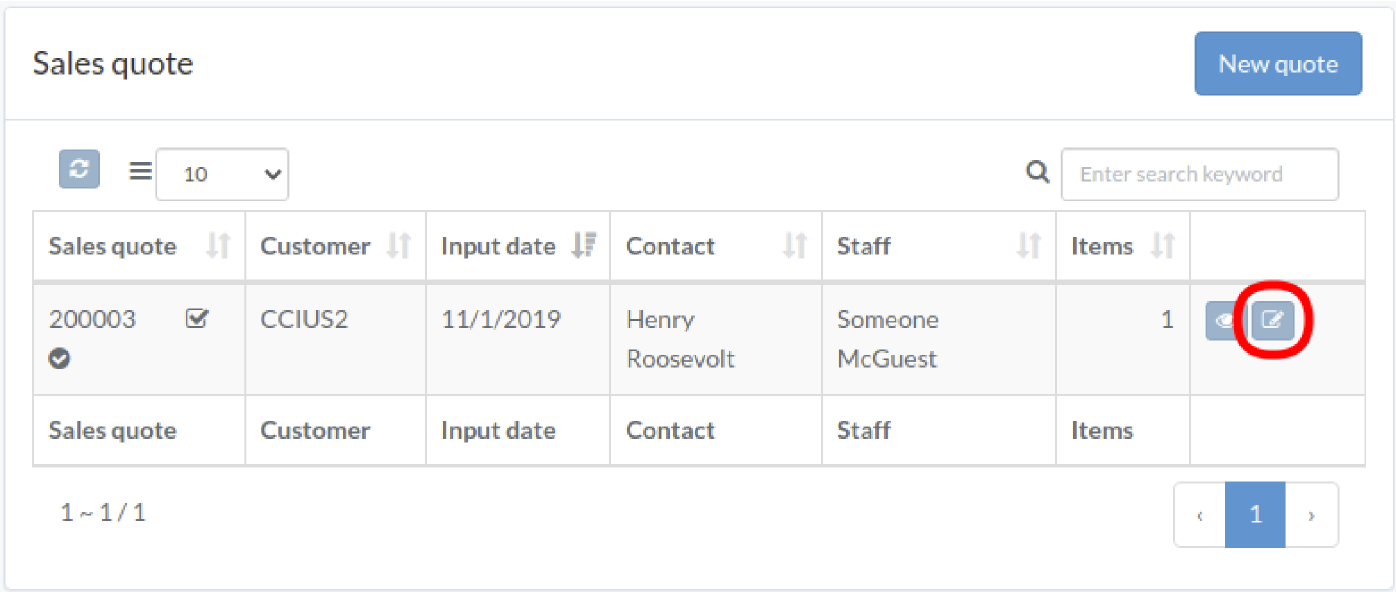
Enter quote data. Click "+ Add line" if needed. Click "Submit" when done.


Work
Employee
System
Someone McGuest
New quote
Document
????
Customer
E000002 (Someone McGuest)
Date
4/1/2022
Payment term
Advance
Expiration
Incoterm
Contact
Someone McGuest
Reference
Staff
Someone McGuest
Currency
USD (U.S. Dollar)
+ Add line
Submit

Quote

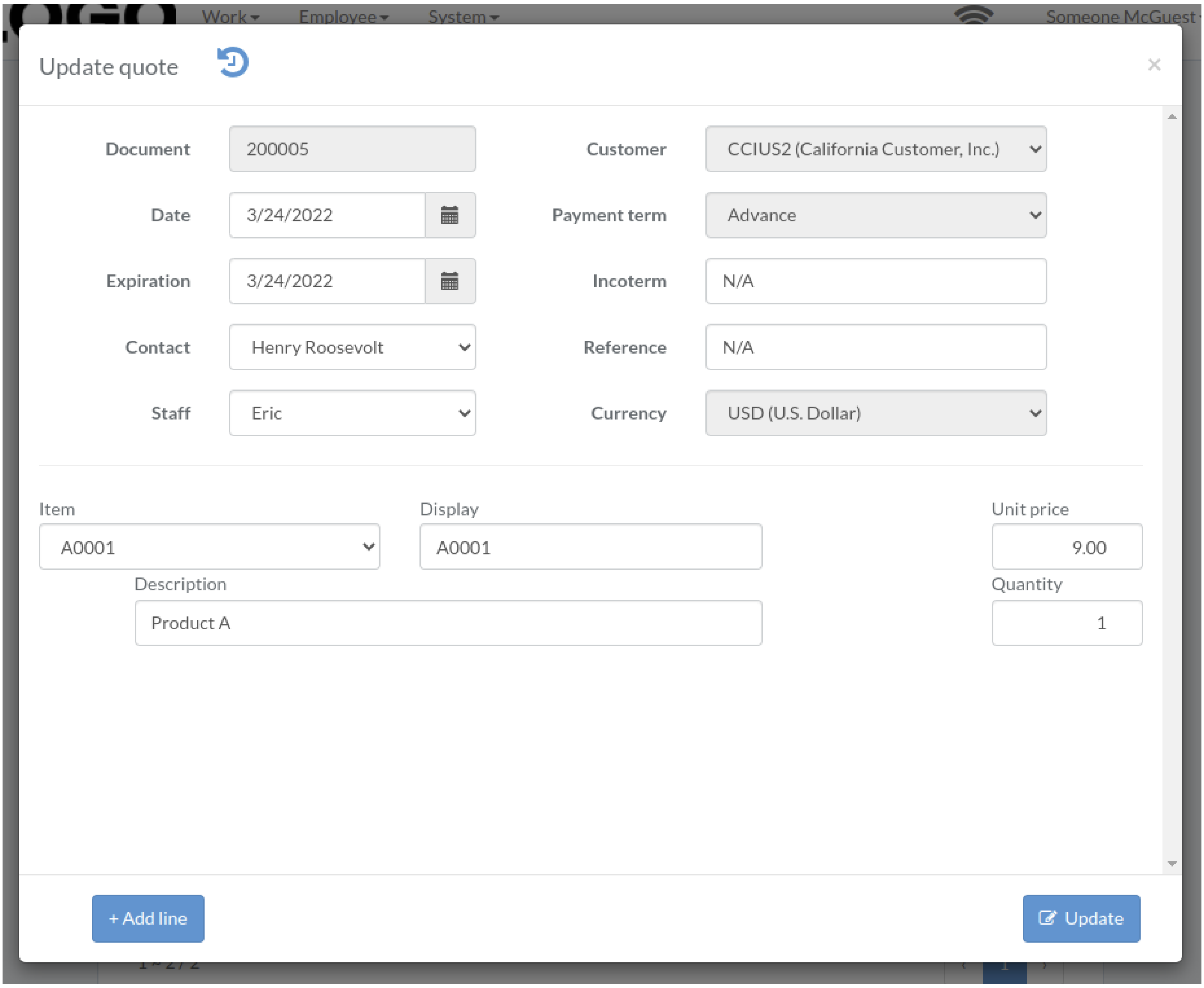
Update quote

Click "Update" button on right of the quote



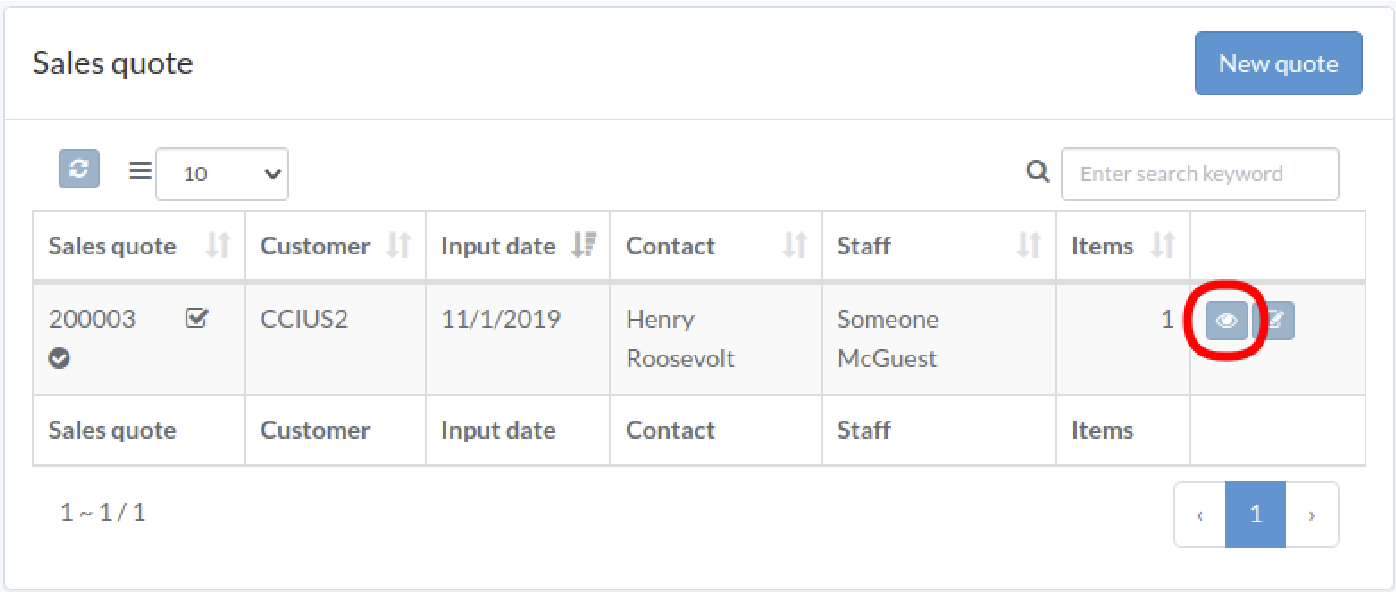
Update quote data, then click "Update"

Click "+ Add line" if needed

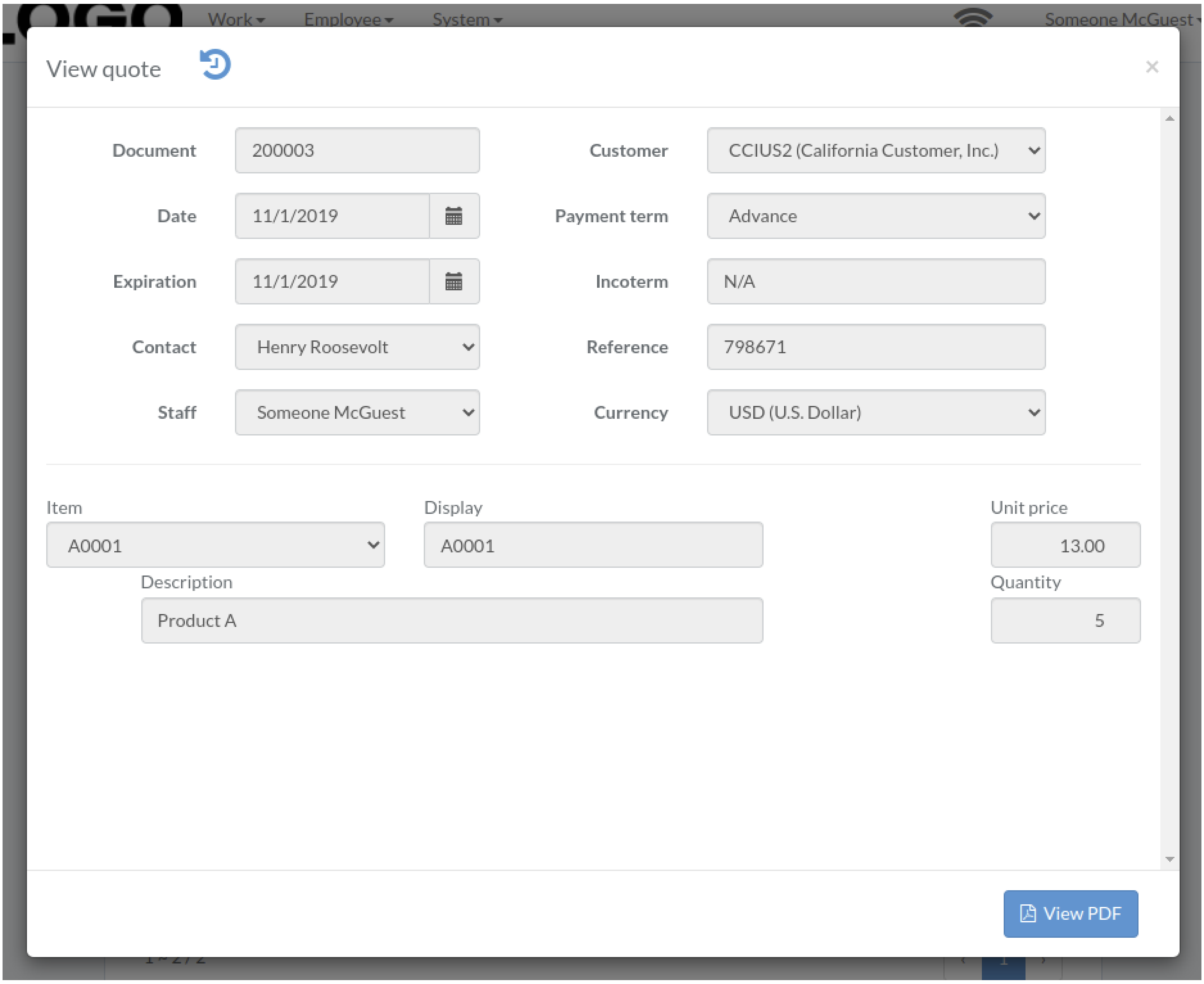

Work
Employee
System
Someone McGuest
Update quote
Document
200005
Customer
CCIUS2 (California Customer, Inc.)
Date
3/24/2022
Payment term
Advance
Expiration
3/24/2022
Incoterm
N/A
Contact
Henry Roosevolt
Reference
N/A
Staff
Eric
Currency
USD (U.S. Dollar)
Item
A0001
Display
A0001
Unit price
9.00
Description
Product A
Quantity
1
+ Add line
Update

View quote

Click "View" button on right of the quote

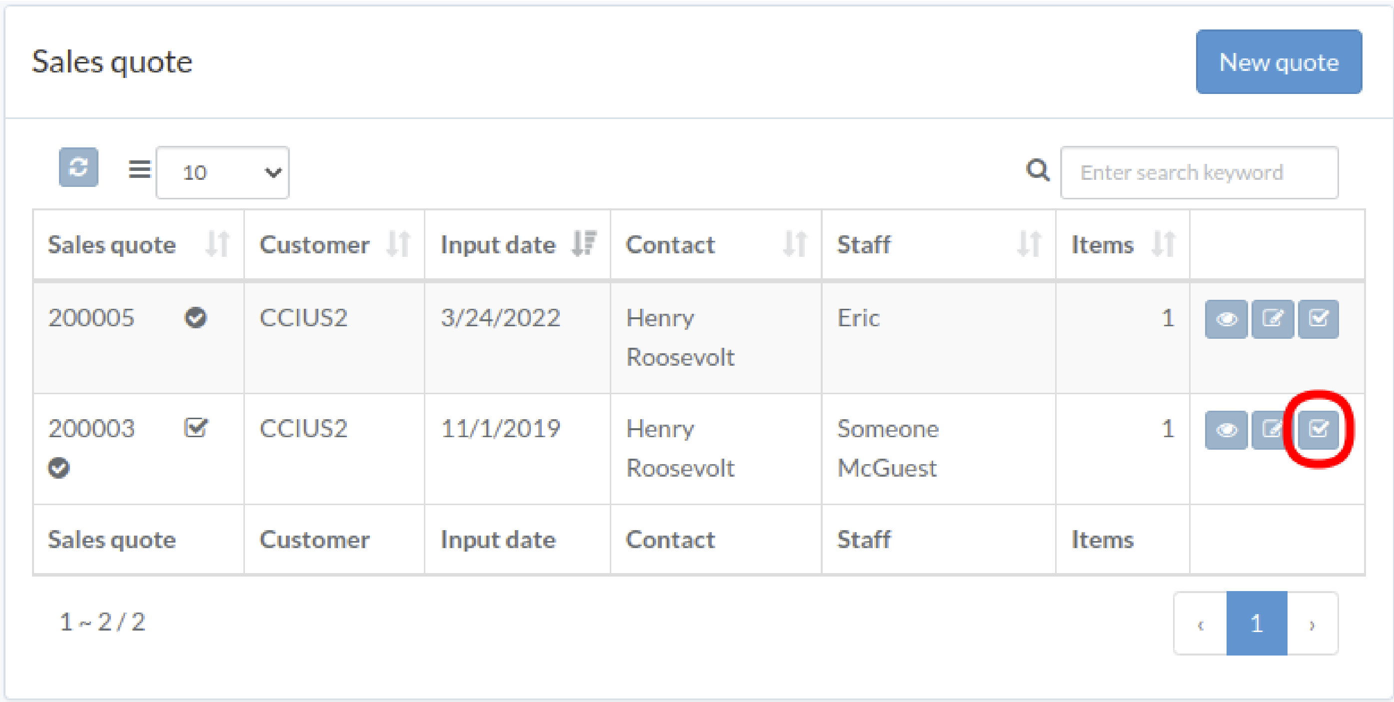


Quote modal appears

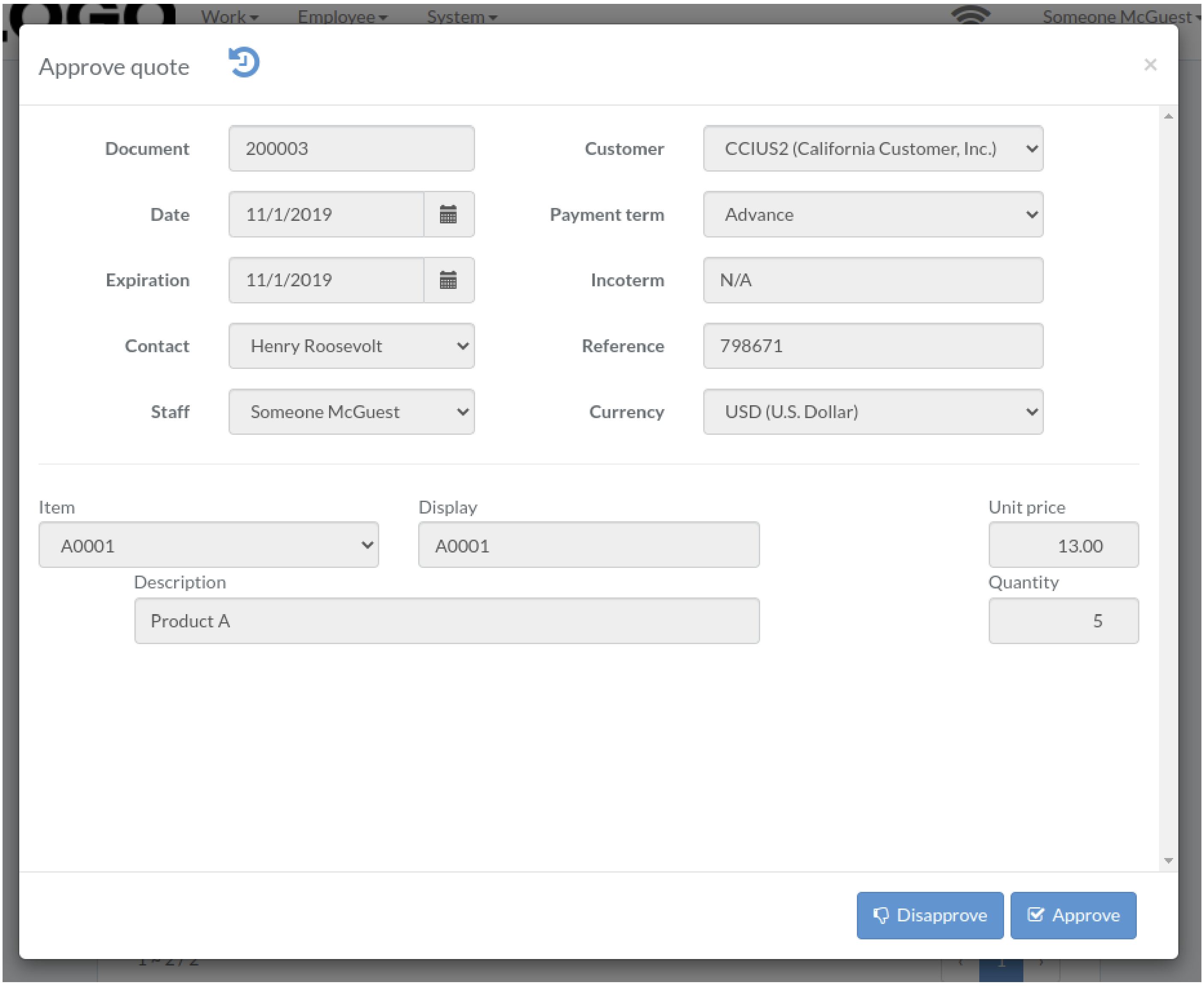

Work
Employee
System
Someone McGuest
View quote
Document
200003
Customer
CCIUS2 (California Customer, Inc.)
Date
11/1/2019
Payment term
Advance
Expiration
11/1/2019
Incoterm
N/A
Contact
Henry Roosevolt
Reference
798671
Staff
Someone McGuest
Currency
USD (U.S. Dollar)
Item
A0001
Display
A0001
Unit price
13.00
Description
Product A
Quantity
5
View PDF

Approve quote

Click "Approve" button on the right of quote



When quote modal appears, click "Approve" or "Disapprove" button to confirm


Work
Employee
System
Someone McGuest
Approve quote
Document
200003
Customer
CCIUS2 (California Customer, Inc.)
Date
11/1/2019
Payment term
Advance
Expiration
11/1/2019
Incoterm
N/A
Contact
Henry Roosevolt
Reference
798671
Staff
Someone McGuest
Currency
USD (U.S. Dollar)
Item
A0001
Display
A0001
Unit price
13.00
Description
Product A
Quantity
5
Disapprove
Approve

Order

Introduction

Following shows a sample window.

The chapter describes features available within the window.

crm-order-en.png

Create Order

Click "New entry", and select order or return

crm-order-en.png

Enter order/return data, then click "Submit"

Click "+ Add line" if needed

so-modal-new-en.png

Update Order

Click "Update" button on right of the order/return

crm-order-en.png

Update order/return data, then click "Update"

Click "+ Add line" if needed

so-update-modal-en.png

View Order

Click "View" button on right of the order/return

crm-order-en.png

Order/return modal appears

so-view-modal-en.png

Reserve Title

Click "Reserve" button to the right of the order/return

crm-order-en.png

After successful attempt, hover mouse to title of order/return, receivable title will appear

reserved-en.png

Approve Order

Click "Approve" button on the right of order/return

crm-order-en.png

When order/return modal appears, click "Approve" or "Disapprove" button to confirm

so-approve-modal-en.png

Work order

Introduction

Following shows a sample window.

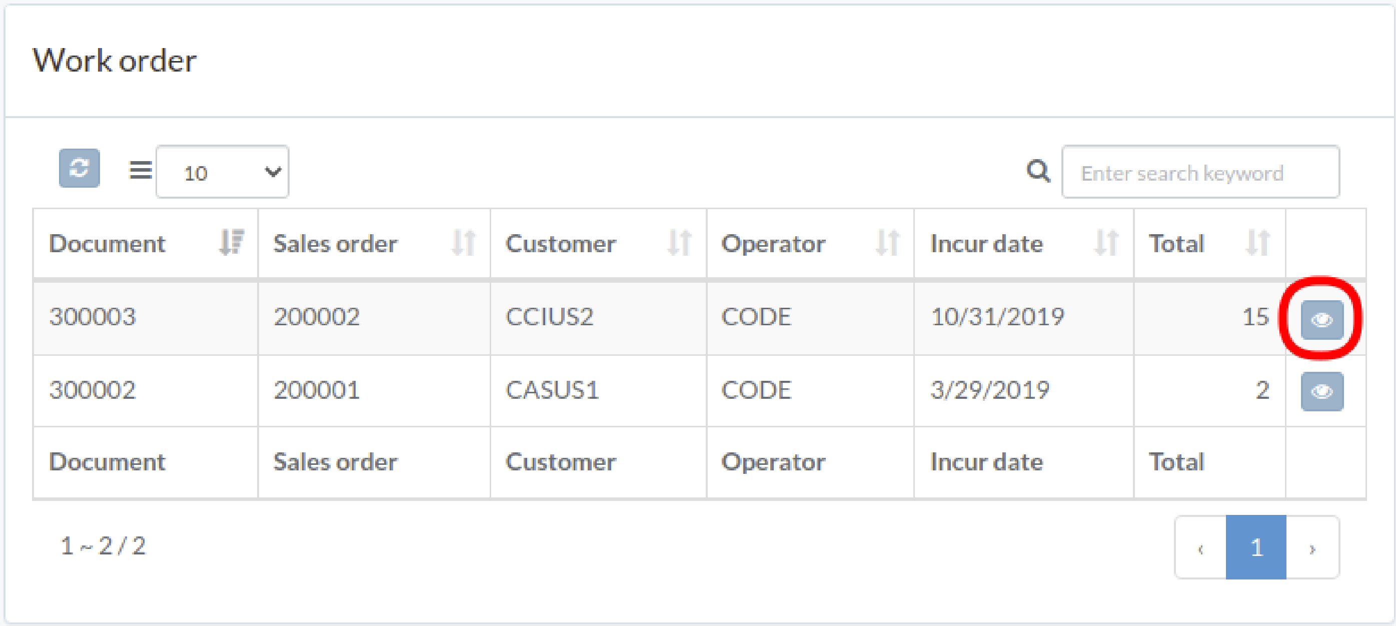
The chapter describes features available within the window.

crm-wo-en.png

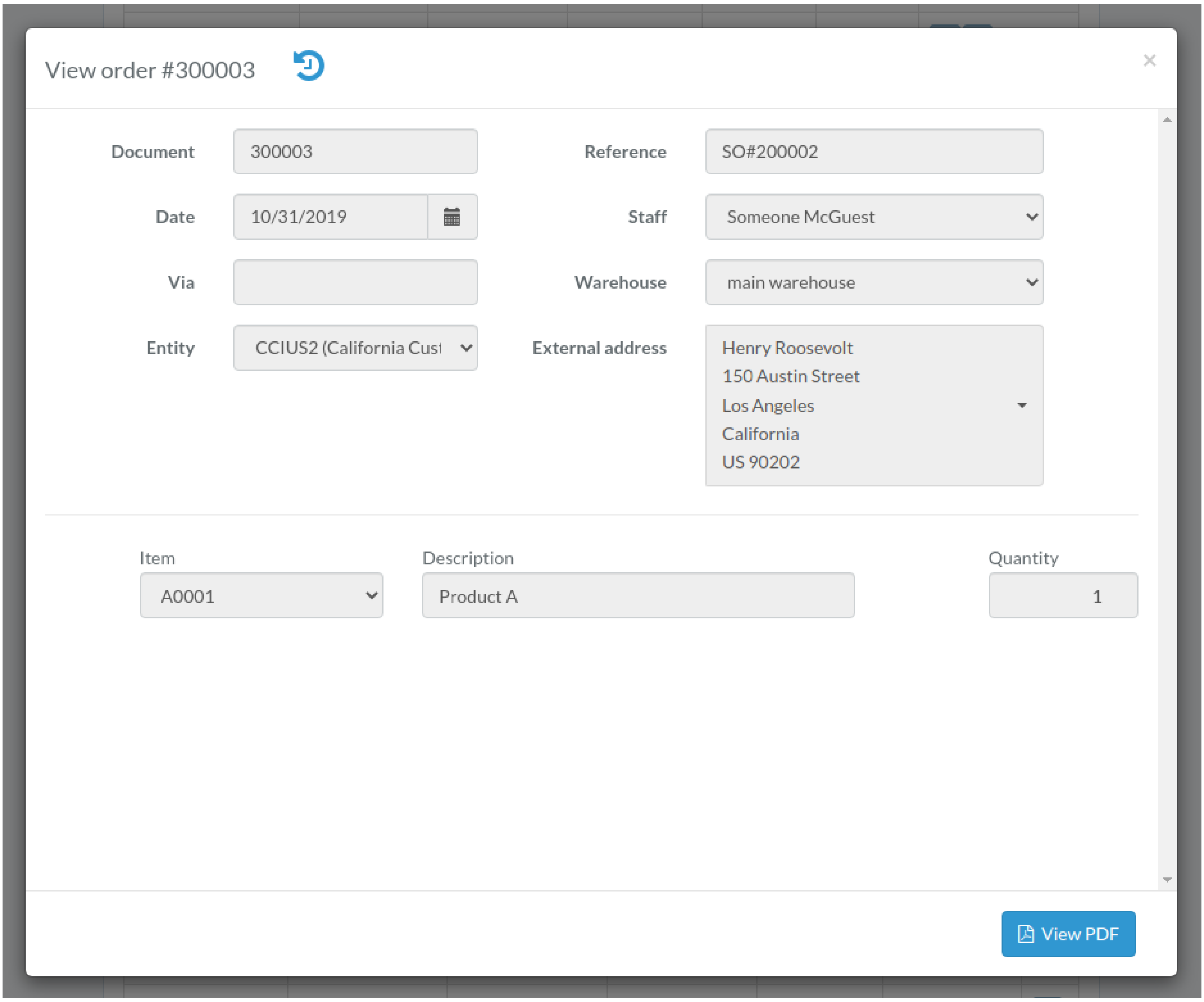
Work order

View order

Click "View" button on the right of order



Order modal appears


View order #300003
Document
300003
Reference
SO#200002
Date
10/31/2019
Staff
Someone McGuest
Via
Warehouse
main warehouse
Entity
CCIUS2 (California Cust
External address
Henry Roosevolt
150 Austin Street
Los Angeles
California
US 90202
Item
A0001
Description
Product A
Quantity
1
View PDF

Invoice

Introduction

Following shows a sample window.

The chapter describes features available within the window.

crm-receivable-en.png

Invoice

View Receivable

Click "View" button on the right of receivable

crm-receivable-en.png

Receivable modal appears

finance-receivable-view-en.png

Expense

Introduction

Following shows a sample window.

The chapter describes features available within the window.

crm-expense-en.png

Create Expense

Click "New expense" on upper right corner of expense table

expense-new-en.png

When expense modal appears, enter all information and click "Create" button.

Click "+ Add line" if needed

expense-new-expense-en.png

Update Expense

Click "Update" button on the right of expense

If no "Update" button, the expense can not be updated.

expense-update-en.png

when expense modal appears, update expense data and click "Update" button

Click "+ Add line" if needed

expense-update-expense-en.png

View Expense

Click "View" button on the right of expense

expense-view-en.png

Expense modal appears

expense-view-expense-en.png

Submit Expense

Click "Submit" button on the right of expense

If no "Submit" button, the expense can not be submitted.

expense-submit-en.png

When expense modal appears, click "Submit" button to confirm submission

expense-submit-expense-en.png

Retract Expense

Click "Retract" button on the right of expense

If no "Retract" button, the expense can not be retracted.

expense-retract-en.png

When expense modal appears, click "Retract" button to confirm retraction

expense-retract-expense-en.png

Approve Expense

Click "Approve" button on the right of expense

expense-approve-en.png

When expense modal appears, click "Approve" or "Disapprove" button to confirm

expense-approve-expense-en.png

Inventory

Introduction

Following shows a sample window.

The chapter describes features available within the window.

crm-inventory-en.png

Inventory

Click "View" button on the right of inventory item

warehouse-inventory-en.png

inventory transaction modal of the item appears

inventory-transaction-modal-en.png

RMA

Report

Introduction

Following shows a sample window.

The chapter describes features available within the window.

crm-report-en.png

Tool

Introduction

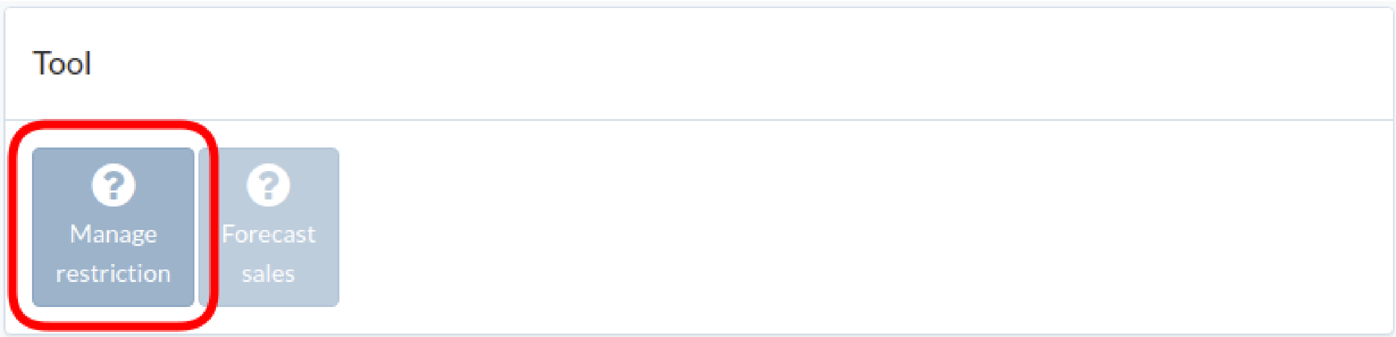
Following shows a sample window.

The chapter describes features available within the window.

crm-tool-en.png

Sales restriction

Click "Sales restriction" in tool window



Select entity, filter, product, and validity.

Click "+ Add line" if more restrictions are needed

Click "Update" when done.

Sales restriction

Entity	Filter	Product	Valid
All	Include	PEPSI-COLA-20	☑
All	Include	COCA-COLA-2L	☑
All	Include	DR-PEPPER-2L	☑
All	Exclude	Expense - Inventory	☑
All	Include	A0001-CTN	☑
All	Include	A0002-CTN	☑

+ Add line

Update