

# **CRM BASICS**

# ADD / EDIT AN ACTIVITY

When creating a **new** activity from the Dashboard (Home page), you will also be creating a **new Case** for the Customer.

A Case can be seen as an umbrella over all the underlying activities that work towards achieving a contract with that customer.

If a Case and an Activity <u>already</u> exists for a customer, then you need to:

- View the current Activity
- Process the 'Next Action'
- Which will complete the current Activity and then
- Create a new Activity

There <u>cannot</u> be more that **1** open Activity at a time, per Case.

Access: Webpage - http://[servername]:[portno]/BPOCRM/User.aspx

#### **CREATE NEW ACTIVITY**

In the CRM *Homepage*,

- 1. Click on the *Add new items...* icon
- 2. Click on the *Activity* tile.



CRM Exam	iple Compa	ny			Abigail Milne 🍄 🕯
🔼 Dasł	nboard			Search	Q
Activit	ies for La	st 30 Da	iys	1 Month Performance	
Description		Existing Custmrs	New Custmrs	0.50	÷
Phone call Email		0	7 1	0.30 customer conta	et
Meeting On Site inspection	on O	0	0	0.29 0.19 0.00	-2
	30 Sep 2016	0	6	Invoices Orders Quotes activity	
	0		λ -	Schedule Date	Status
create cold call	recommendation	s war		No data to display	
74		6	6		
	-	Ë	Ë.		
customers	cases 12	acti 17	vities 4		
$\mathcal{Q}$	¢,		ς [		
quotes	equipment	3rd	party		
a programment application				©2019 C03 Technologies (Pty) Ltd ( 3.5.6.0 / 3.5.6.0)	

1. The **Save Activity** screen will be displayed.

#### **CASE DETAILS**

- 2. Add details to the following fields:
  - i. **Customer**: Click in this field to display a list of all the customers on the system. Select the relevant customer.
  - ii. Contact: Click in this field to display a list of all the contacts linked to the customer specified above. Select the applicable contact.
  - iii. **Salesman**: This will auto populate with the person currently logged on to the system
  - iv. Subject: Type in the subject of this case (e.g. New product range cold call ).
  - v. **Information**: Type in any additional information pertinent to this case (e.g. *Review client requirements*).



Note: Although this is not a mandatory field, it is an important one. A salesman may not always remember extra details specific to a customer. Here you can include any extra pertinent information that may help build good customer relationship which will help the salesman achieve / win this case.

CCM Example Con	mpany		Abigail Milne 🔅
📞 🛛 Save Acti	ivity 🗕 🕕		🗲 🗎
- Case	* Customer * Contact * Salesman * Subject Information	Customer name Contact name Salesman assigned to case The subject of the case Information relating to the case	←-2
	* Value Case Type	The estimated value Type of Case	Source Type The type of source
	Case Date	17 Jul 2019	Expected Completion 24 Jul 2019
	Attachments		Browse
		Please note, new files will only be add time will be appended to the file name	ed to the case when it is saved. If an attachment with the same name already exists, the current date and v
Related Customers	Related Customers	<ul> <li>Related Customers</li> <li>No data to display</li> </ul>	
- Case State	* Case State Percentage	Current Case State % Probability based on Case State	
- Activity	* Type Address * Subject Comments	Activity type The address relating to the activity The subject of the activity Information relating to the activity	
Activity Attendees	Attendees Send Email Invites	Attendees     *note that invitations can only be	Case contact and salesman are always made attendees sent to attendees with valid email addresses
- Schedule	Date Reminder	17 Jul 2019 from 12:00 to Email SMS 30 minutes befor	13:00 e scheduled start
+ Quote			
			B Save

1. Value: Type in the estimated value of this case.

**Case Type**: Click in this field to display a list of all the Case Types set up on the system (e.g. Machine Sales or New Deal). Select the relevant Case Type.

**Case Date**: This will auto populate with the current date.

• Either type in, or click on the drop-down arrow that appears and use the calendar function to



select the date of this case

**Source Type**: Click in this field to display a list of all the source types set up on the system (e.g. Referral, Google Ads - how you heard about this customer). Select the applicable source type.

**Expected Completion**: This will auto populate with the date 7 days <u>after</u> the auto populated case date.

• Either type in, or click on the drop-down arrow that appears and use the calendar function to select the expected completion date of this case.

#### **ATTACHMENTS**

2. Click on the *Browse…* button.

CCM Example Co	pany Abigail Miln	е 🎝
Save Act	ity 🗲	В
- Case	Customer King Enterprises Contact Jason King Contact Jason King Salesman Abigail Mine Subject New product range cold call Information Review client requirements 2	
	Value The estimated value     Case Type The type of Case     Case Type Type of Case     Case Date 17 Jul 2019     Attachment     Attachment Attachment     Attachment Mith the same name already exists, the of     date and time will be appended to the file name.	vse
	No data to display	
Related Customers	Related Customers 🗘 Related Customers No data to display	
- Case State	Case State: Current Case State Percentage % Probability based on Case State	
- Activity	<ul> <li>Type Activity type</li> <li>Address The address relating to the activity</li> <li>Subject The subject of the activity</li> <li>Comments Information relating to the activity</li> </ul>	
Activity Attendees	Attendees 📀 Case contact and salesman are always made attendees Send Email Invites 🗌 *note that invitations can only be sent to attendees with valid email addresses	
- Schedule	Date 17 Jul 2019 from 12:00 to 13:00 Reminder Email SMS 30 minutes before scheduled start	
+ Quote		
	🖹 Save	



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



- 1. The link for the selected document is now attached in the *Case* frame
- 2. You can now view a *Bin* icon. This can be used this to *Delete* the attachment from this frame, if required.

#### **VIEW ATTACHMENT**

3. Click on the link.



CCM Example Co	ompany		At	oigail Milne 🌻
Save Act	tivity			+ 🗎
- Case	* Customer * Contact * Salesman * Subject Information	King Enterprises Jason King Abigail Milne New product range cold call Review client requirements		
	Value Case Type Case Date Attachments	7500 Type of Case 18 Jul 2019 Attached files Please note, new files will only be added to date and time will be appended to the file	Source Type Cold Call Expected Completion 25 Jul 2019 o the case when it is saved. If an attachment with the same name already	Browse exists, the current
Related Customers	Related Customers	Company Name.docx Company Name.docx Related Customers No data to display	-8 <u>0</u>	
- Case State	* Case State Percentage	Current Case State % Probability based on Case State		
- Activity	* Type Address * Subject Comments	Activity type The address relating to the activity The subject of the activity Information relating to the activity		
Activity Attendees	Attendees Send Email Invites	Attendees      The sent of the sent o	ase contact and salesman are always made attendees t to attendees with valid email addresses	
- Schedule	Date Reminder	18 Jul 2019 from 17:00 to 1 Email SMS 30 minutes before sc	8:00 heduled start	
+ Quote				
		🖹 Save	2	

• A *tab* will open at the foot of the screen, click on this tab.



CCM Example Compa	iny		Abigail Miln	e 🤇
📞 Save Activit	<b>y</b>		<del>¢</del>	F
Case	* Customer * Contact * Salesman * Subject Information * Value Case Type	King Enterprises Jason King Abigail Milne New product range cold call Review client requirements 7500 Type of Case	Source Type Cold Call	
	Case Date Attachments	Attached files Please note, new files will only be added to the case when it is saved. If an current date and time will be appended to the file name. Company Name door	attachment with the same name already exists, the	
Related Customers	Related Customers	Related Customers No data to display		
Case State	* Case State Percentage	Current Case State % Probability based on Case State		
Activity	* Type Address * Subject Comments	Activity type The address relating to the activity. The subject of the activity Information relating to the activity		
Activity Attendees	Attendees Send Email Invites	Attendees     Case contact and salesman are alwa     "note that invitations can only be sent to attendees with valid email ad	iys made attendees dresses	
Schedule	Date Reminder	18 Jul 2019 from 17:00 to 18:00 Email SMS 30 minutes before scheduled start		
Company Name (docx	^		Show all	),

• The attachment will open for viewing. *Exit* the screen to return to the *Save Activity* screen.





- 1. An Attachments information message informs you;
  - Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

## **RELATED CUSTOMERS**

You can link a *Related Customer*, in order to invite contacts from various clients to an Activity - such as a meeting or training session.



2. Hover over the *Related Customers* field to reveal a drop-down arrow, click on this arrow.

CM Example Con	npany		Abigail Milne 🌻
📞 🛛 Save Acti	vity		🔶 🗎
- Case	* Customer	King Enterprises	
	* Contact	Jason King Abiasil Milas	
	* Subject	New product range cold call	
	Information	Review client requirements	
	* Value	7500	
	Case Type	Type of Case Source Type Cold Call	
	Case Date	18 Jul 2019 Expected Completion 25 Jul 2019	
	Attachments		Browse
	0>[	Please note, new files will only be added to the case when it is saved. If an attachment with the same name a date and time will be appended to the file name.	Iready exists, the current
	13	Company Name.docx	<b>b</b>
Related Customers	Related Customers	O V wed Customers	
		No data to display 2	
- Case State	* Case State	Gurrent Case State	
	Percentage	% Probability based on Case State	
- Activity	* Type	Artivity tuna	
	Address		
	* Subject	The subject of the activity	
	Comments	Information relating to the activity	
Activity Attendees	Attendees	Attendees	
		Case contact and salesman are always made attendees	
	Send Email Invites	*note that invitations can only be sent to attendees with valid email addresses	
- Schedule	Date Reminder	18 Jul 2019 from 17:00 to 18:00 Email SMS 30 minutes before scheduled start	
+ Quote			
		🖹 Save	

- 1. A *list of customers* already set up on the system will be displayed.
- 2. Select the applicable related customer.



CCM Example Com	pany		Abigail Milne 🌣
📞 Save Activ	vity		🗲 🗎
- Case	* Customer Kil * Contact Ja * Salesman Ab * Subject Ne Information Re * Value 75 Case Type Ty Case Date 17 Attachments Attachments	ng Enterprises son King igail Mine w Product Range Cold Call view client requirements Machine Sale 00 pe of Case Jul 2019 ttached files are note new files will only be added to	Source Type Cold Call Expected Completion 24 Jul 2019 The case when it is caued. If an attachment with the same name already exist, the current
Related Customers	dal Related Customers	te and time will be appended to the file r	No data to display
	$0 \rightarrow$	Hack PC - IT Shop	HACODI
- Case State	* Case State Cu Percentage %	Healing Hands Pr Hope Works	HEA0001 HOP001
- Activity	* Type Ac Address Th * Subject Th Comments Inf	1 Josphines     Jose Carponies     Jose Carpony Shop     Judes Jewels     Just In Time     formation relating to the activity     2	1 150001 30E0001 30D0001 305001
Activity Attendees	Attendees 🔇 Send Email Invites 🗌	Attendees Ca *note that invitations can only be sent	ise contact and salesman are always made attendees to attendees with valid email addresses
- Schedule	Date 17 Reminder Em	Jul 2019 from 13:00 to 14 mil □ SMS □ 30 minutes before sch	1:00 eduled start
+ Quote			
		🖹 Save	

- 1. The selected *Customer Name* and *Code* will populate the field.
- 2. Click on the *plus*[+] button.



CCM Example Co	mpany	Abigail Milne 🌻
Save Act	ivity	🔶 🗎
- Case	<ul> <li>Customer King Enterprises</li> <li>Contact Jason King</li> <li>Salesman Abigail Milne</li> <li>Subject New Product Range C</li> <li>Information Review client requires</li> </ul>	Cold Call ments Machine Sale
	Value 7500 Case Type Type of Case Case Date 17 Jul 2019 Attachments Please note, new files date and time will be	Source Type Cold Call Expected Completion 24 Jul 2019 5 will only be added to the case when it is saved. If an attachment with the same name already exists, the current appended to the file name.
	2	No data to display
Related Customers	Related Customers 🗿 Hope Works; H No data to display	
- Case State	* Case State Current Case State Percentage % Probability based	on Case State
- Activity	<ul> <li>Type Activity type</li> <li>Address The address relating</li> <li>Subject The subject of the address comments. Information relations</li> </ul>	to the activity tivity to the activity
Activity Attendees	Attendees 😋 Attendees	
	Send Email Invites 🗌 *note that invitat	Case contact and salesman are always made attendees tions can only be sent to attendees with valid email addresses
- Schedule	Date 17 Jul 2019 from Reminder Email SMS 3	1 13:00 to 14:00 30 minutes before scheduled start
+ Quote		
		Save

- 1. The selected customer name will now appear in the data grid below this field.
- 2. You can now view a *Bin* icon you can use this to <u>delete</u> the customer from this data grid, if required.

#### LINK ADDITIONAL RELATED CUSTOMER(S)

3. Hover over the *Related Customers* field again to reveal the drop-down arrow, click on this arrow.



CCM Example Company	(			Abigail Milne 🕇
📞 Save Activity				🔶 🗄
- Case	* Customer	King Enterprises		
	* Contact	Jason King		
	* Salesman	Abigail Milne		
	* Subject	New product range cold call		
	Information	Review client requirements		
	* Value	7500		
	Case Type	Machine Sale	Source Type Cold Call	
	Case Date	17 Jul 2019	Expected Completion 24 Jul 2019	
	Attachments	Attached files		Browse
	3	Please note, new files will only be adder date and time will be appended to the f	d to the case when it is saved. If an attachment with the same name alr ile name.	eady exists, the curre
	~	\	No data to display	
Related Customers	Related Customers	Hone Works: HOP001		
		Hope Works - HOP001		
- Case State	* Case State	Current Case State		
	Percentage	% Probability based on Case State		
- Activity	* Type	Activity type		
	Address	The address relating to the activity		
	* Subject	The subject of the activity		
	Comments	Information relating to the activity		
Activity Attendees	Attendees	⊕ Attendees		
			Case contact and salesman are always made attendees	
	Send Email Invites	*note that invitations can only be s	ent to attendees with valid email addresses	
- Schedule	Date Reminder	17 Jul 2019 from 16:00 to Email SMS 30 minutes before	17:00 scheduled start	
+ Quote				
		💾 Sa	ve	

- 1. The list of *customers* will be displayed.
- 2. Select the <u>additional</u> related customer.



CCM Example Co	mpany		Abigail Milne 🍄
Save Act	ivity		← 🗎
- Case	* Customer Kin * Contact Jas * Salesman Abi * Subject Nev Information Rev	g Enterprises on King gail Miline v product range cold call iew client requirements	
	* Value 750 Case Type Mad Case Date 17 Attachments	oo chine Sale Jul 2019 tached files	Source Type Cold Call Expected Completion 24 Jul 2019 Browse
Related Contarran	Plea date	se note, new files will only be added to the cr a and time will be appended to the file name.	se when it is saved. If an attachment with the same name already exists, the current No data to display
Related Customers	Related Customers 😔	ViHope Works: HOP001	Code TES001
- Case State	Case State Cur Percentage % I	The Very Interesting Shop of Goodies Tinas Coffee Shop	THE0001 TIN001 TX001
~ Activity	* Type Act Address The * Subject The Comments Info	Westwood Dynamic Young Designs Young Electric ormation relating to the activity	VE5001 YOU0001 YE5001
Activity Attendees	Attendees 📀 Send Email Invites 🗌	Attendees Case cor *note that invitations can only be sent to attr	ntact and salesman are always made attendees endees with valid email addresses
- Schedule	Date 17 Reminder Ema	Jul 2019 from 16:00 to 17:00 ail SMS 30 minutes before scheduler	i start
+ Quote			
		🖹 Save	

- 1. The selected <u>additional</u> Customer Name and Code will populate the *Related Customers* field.
- 2. Click on the *plus* [+] button.



CCM Example Con	npany		Abigail Milne 🍄
📞 Save Acti	vity		🗲 🗃
- Case	* Customer = Contact * Salesman * Subject Information * Value	King Enterprises Jason King Abigail Milne New product range cold call Review client requirements 7500	
	Case Type	Machine Sale	Source Type Cold Call
	Case Date	17 Jul 2019	Expected Completion 24 Jul 2019
	2	Please note, new files will only be added date and time will be appended to the fi	I to the case when it is saved. If an attachment with the same name already exists, the current le name. No data to display
Related Customers	Related Customers	Titan Group; TIA001	-0 🚥
- Case State	* Case State Percentage	Current Case State % Probability based on Case State	
- Activity	* Type Address * Subject Comments	Activity type The address relating to the activity The subject of the activity Information relating to the activity	
Activity Attendees	Attendees Send Email Invites	Attendees     *note that invitations can only be so	Case contact and salesman are always made attendees ant to attendees with valid email addresses
- Schedule	Date Reminder	17 Jul 2019 from 16:00 to Email SMS 30 minutes before	17:00 scheduled start
+ Quote			
		🖺 Sa	ve

- 1. The <u>additional</u> customer name will now populate the data grid.
- 2. Note the *additional bin* to enable you to <u>remove</u> this additional customer, if required.

You can continue to add customers in this way until you have <u>all</u> the related customers listed in the data grid.



CCM Example Company	1		Abigail Milne		
📞 Save Activity			<b>+</b>		
Case	* Customer	King Enterprises			
	* Contact	Jason King			
	* Salesman	Abigail Milne			
	* Subject	New product range cold call			
	Information	Review client requirements			
	* Value	7500			
	Case Type	Machine Sale	Source Type Cold Call		
	Case Date	17 Jul 2019	Expected Completion 24 Jul 2019		
	Attachments		Browse.		
		Please note, new files will only be added to th current date and time will be appended to the	ie case when it is saved. If an attachment with the same name already exists, the file name.		
Polated Cuctomore					
Related Customers	Related Costoners • Inan Group, 14001				
		Titan Group - TIA001	Ĩ		
Case State	* Case State	Current Case State			
a	Fercencage	78 Probability based on case state			
ACUVILY	* Type				
	Address				
	* Subject	The subject of the activity			
	Comments	Information relating to the activity			
Activity Attendees	Attendees	• Attendees			
	Sand Empil Invites	Case (	contact and salesman are always made attendees		
Schedule	Date	17 Jul 2019 from 16:00 to 17:0			
	Reminder	Email SMS 30 minutes before sched	uled start		
Quote					
		🗎 Save			

## CASE STATE

- 1. Hover over the *Case State* field to reveal the drop-down arrow, click on this arrow.
- 2. A list of Case State *Descriptions* and their related *Percentages* (% probability based on Case State) will be displayed.
- 3. Select the Case State *Description* that applies to this activity.
  - Note 1: If this Case Type has <u>Stage Gates</u> enabled, you can select whether to update the Stage Gates settings after saving the Case.
  - Note 2: If this Case Type has <u>Stage Gates</u> enabled, the Case State will update automatically to the first Case State configured (You will need to update the Stage Gate Answers to move to the next Case State). Otherwise, select the Case State.



 Note 3: The Case State Percentage will update based on the Case State selected.

CCM Example Co	ompany		Abigail Milne 🂠
Save Act	tivity		+ 🗎
- Case	* Customer * Contact * Salesman * Subject Information	King Enterprises Jason King Abigail Milne New product range cold call Review client requirements	×
	* Value Case Type Case Date Attachments	7500 Machine Sale 17 Jul 2019 Attached files Please note, new files will only be adde current date and time will be appended	Source Type Cold Call Expected Completion 24 Jul 2019 d to the case when it is saved. If an attachment with the same name already exists, the to the file name.
Related Customers	Related Customers	<ul> <li>Titan Group; TIA001</li> <li>Hope Works - HOP001</li> <li>Titan Group - TIA001</li> </ul>	No data to display
- Case State	2 * Case State	Description	Percentage
- Activity	* Type Address * Subject Comments	Closed - Lost Distant prospect - on hold Interested Meeting Proposal or quote 3	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0
Activity Attendees	Attendees Send Email Invites	Attendees     *note that invitations can only be s	Case contact and salesman are always made attendees sent to attendees with valid email addresses
- Schedule	Date Reminder	17 Jul 2019 from 16:00 to Email SMS 30 minutes before	17:00 e scheduled start
+ Quote		🖺 Sa	•

1. The *Percentage* field will populate according to the Case State selected.

## ACTIVITY

- 2. Click in the *Type* field to display an *Activity Type* drop-down list.
- 3. Select from this list the applicable type (e.g. Phone call).



CCM Example Co	mpany		Abigail Milne 🌣
Save Act	ivity		<del>¢</del> 🗎
- Case	* Customer * Contact * Salesman * Subject Information	King Enterprises Jason King Abigail Milne New product range cold call Review client requirements	
	* Value Case Type Case Date Attachments	7500 Machine Sale 17 Jul 2019 Attached files Please note, new files will only be added to the ca date and time will be appended to the file name.	Source Type The type of source Expected Completion 24 Jul 2019 Browse se when it is saved. If an attachment with the same name already exists, the current
			No data to display
Related Customers	Related Customers	Titan Group; TIA001     Hope Works - HOP001     Titan Group - TIA001	10 10 10
- Case State	* Case State Percentage	Interested (20%)	
- Activity	* Type Address * Subject Comments	Phone call Second Secon	
Activity Attendees	Attendees	Attendees     Case con	itact and salesman are always made attendees
- Schedule	Send Email Invites Date Reminder	<ul> <li>*note that invitations can only be sent to atte</li> <li>18 Jul 2019 from 11:00 to 12:00</li> <li>Email SMS 30 minutes before scheduled</li> </ul>	indees with valid email addresses
+ Quote			
		🖹 Save	

- Click in the *Address* field, a list of all addresses linked to the customer will be displayed.
- 2. Select the applicable address from this list.



CCM Example Co	mpany		Abigail Milne 🗭
Save Act	tivity		<b>+</b> 🗄
- Case	* Customer	King Enterprises	
	* Contact	Jason King	
	* Salesman	Abigail Milne	
	* Subject	New product range cold call	
	Information	Review client requirements	
	* Value	7500	
	Case Type	Machine Sale	Source Type The type of source
	Case Date	17 Jul 2019	Expected Completion 24 Jul 2019
	Attachments		Browse
		Please note, new files will only be added to the cas date and time will be appended to the file name.	e when it is saved. If an attachment with the same name already exists, the current
			No data to display
Related Customers Re	Related Customers	<ul> <li>Titan Group; TIA001</li> </ul>	
		Hope Works - HOP001	tin the second se
		Titan Group - TIA001	
- Case State	* Case State	Interested (20%)	
	Percentage	20%	
- Activity	* Type	Phone call	
	Address	~	
	* Subject	1 Richmond Street Richmond Town Richmond City	
	00000	2 Upton Road Upton Town Upton City	2
	Comments	1 New Street New Town New City	
		1 Downton Street Downton Town Downton City	
A CARL MADE AND COMPANY		10 Main Road Main Town Main City KZN	
Activity Attendees	Attendees	10 Main Road Main Town Main City KZN	art and colorests are always made attendess
	Send Email Invites	*note that invitations can only be sent to atter	idees with valid email addresses
- Schedule	Date	18 Jul 2019 from 11:00 to 12:00	
	Reminder	Email SMS 30 minutes before scheduled	start
+ Quote			
		B Save	

- 1. Type in the *Subject* of this Activity (e.g. Phone call to discuss present client requirements and give overview of new product range).
- 2. Type in a *Comment* relating to this Activity (e.g. Customer currently rents Model: xxyyx).



CCM Example Co	ompany		Abigail Milne 🌣
📞 Save Act	tivity		🔶 🗎
- Case	* Customer * Contact * Salesman * Subject Information	King Enterprises Jason King Abigail Milne New product range cold call Review client requirements	
	Value Case Type Case Date Attachments	7500 Machine Sale S 17 Jul 2019 Expected ( Attached files Please note, new files will only be added to the case when it is saved. If an attachment date and time will be appended to the file name.	ource Type. The type of source Completion 24 Jul 2019 Browse It with the same name already exists, the current
Related Customers	Related Customers	No data to display Titan Group; TIA001 H Hope Works - HOP001 Titan Group - TIA001	
- Case State	* Case State Percentage	Interested (20%) 20%	
- Activity	* Type Address * Subject Comments	Phone call 2 Upton Road Upton Town Upton City The subject of the activity Information relating to the activity	
Activity Attendees	Attendees Send Email Invites	Attendees     Case contact and salesman are always made     *note that invitations can only be sent to attendees with valid email addresses	attendees
- Schedule	Date Reminder	18 Jul 2019 from 11:00 to 12:00 Email SMS 30 minutes before scheduled start	
+ Quote			
		🖹 Save	

#### **ACTIVITY ATTENDEES**

- 1. Hover over the *Attendees* field to reveal the drop-down arrow, click on this arrow.
- 2. A list of *Attendee Names* and and the *Customer Name* that each is linked to, will be displayed.
- 3. Select the *Attendee* that you wish to <u>add</u> to this Activity.



CCM Example Com	pany		Abigail Milne 🕻
📞 Save Activ	/ity		🔶 🗧
Case	* Customer	King Enterprises	
	* Contact	Jason King	
	* Salesman	Abigail Milne	
	* Subject	New product range cold call	
	Information	Review client requirements	
	* Value	7500	
	Case Type	Machine Sale	Source Type The type of source
	Case Date	17 Jul 2019	Expected Completion 24 Jul 2019
	Attachments	Attached files	Browse
		Please note, new files will only be added to the date and time will be appended to the file name	ne case when it is saved. If an attachment with the same name already exists, the curren
			No data to display
Related Customers	Related Customers	Titan Group; TIA001	
		Hope Works - HOP001	
		📕 Titan Group - TIA001	
· Case State	* Case State	Interested (20%)	
	Percentage	20%	
- Activity	* Type	Phone call	
	Address	2 Unton Road Unton Town Upton City	
	* Subject	Phone call to discuss present client requirem	ents and give overview of new product range.
	82		
	Comments	Customer currently rents Model: xxyyx	
Activity Attendance	1		
Activity Attenuees	Attendees	Affendes Nama	Customer Nama
	4	Jackie Sutherland	Titan Group
	Send Email Invites	Jane, Alrich.	Hope Works
manufacture -	121	Jason King	King Enterprises
Schedule	Date	18 John West	Hope Works
	Reminder	Kelly Jones	Hope Works
		and the second second second	Hone Works
- Quote		larry king	Tope Hone
+ Quote		Lucy Rowe	King Enterprises

- 1. The selected **Attendee Name** will populate the **Attendees** field.
- 2. Click on the *plus*[+] button.



CCM Example Co	ompany	Abigail Milr	ne 🌣
📞 Save Ac	tivity	÷	Β
- Case	Customer Contact Salesman Subject Information Value Case Type Case Date Attachments	King Enterprises Jason King Abigail Milne New product range cold call Review client requirements 7500   Machine Sale 17 Jul 2019 Expected Completion 24 Jul 2019 Attached files Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the date and time will be appended to the file name.	wse
		No data to display	
Related Customers	Related Customers	<ul> <li>Titan Group; TIA001</li> <li>□ Hope Works - HOP001</li> <li>□ Titan Group - TIA001</li> </ul>	
- Case State	* Case State Percentage	Interested (20%) 20%	
- Activity	* Type Address * Subject Comments	Phone call 2 Upton Road Upton Town Upton City Phone call to discuss present client requirements and give overview of new product range. Customer currently rents Model: <u>XXYYX</u>	
Activity Attendees	Attendees Send Email Invites	Kelly Jones     Case contact and salesman are always made attendees     Case contact and salesman are always made attendees     *note that invitations can only be sent to attendees with valid email addresses	
- Schedule	Date Reminder	18 Jul 2019 from 11:00 to 12:00 Email SMS 30 minutes before scheduled start	
+ Quote			
		Save	

- 1. The selected Attendee Name will now appear in the data grid below this field.
- 2. You can now view a *Bin* icon you can use this to <u>delete</u> the Attendee from this data grid, if required.
- 3. Note that there is now a *Page Reference* field that reflects the contents of this data grid:
  - (Page 1 of 1 ( <u>1</u> items).



CCM Example Co	mpany	Abigail Milne 🌻
📞 Save Act	ivity	🔶 🗃
- Case	* Customer * Contact * Salesman * Subject Information * Value Case Type Case Date Attachments	King Enterprises Jason King Abigail Mine New product range cold call Review client requirements 7500 Machine Sale 17 Jul 2019 Expected Completion 24 Jul 2019 Attached files Prowse Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.
Related Customers	Related Customers	No data to display          Titan Group; TIA001         Hope Works - HOP001         Titan Group - TIA001
- Case State	* Case State Percentage	Interested (20%) 20%
- Activity	* Type Address * Subject Comments	Phone call 2 Upton Road Upton Town Upton City Phone call to discuss present client requirements and give overview of new product range. Customer currently rents Model: <u>xxvyx</u>
Activity Attendees	Attendees	Kelly Jones      Kelly Jones      Kelly Jones      Page 1 of 1 (1 fems) (1)      Page size: 10      Page size: 10      Page size: 10
- Schedule	Date Reminder	18 Jul 2019 from 11:00 to 12:00 Email SMS 30 minutes before scheduled start
+ Quote		Save

#### LINK ADDITIONAL ATTENDEE(S)

- 1. Hover over the *Attendees* field again to reveal the drop-down arrow, click on this arrow.
- 2. The list of *Attendee Names* will display again.
- 3. Select the additional Attendee that you wish to add to this Activity.



CCM Example Compa	ny		Abigail Milne 🌻
📞 Save Activit	y		🗕 🔶
- Case	* Customer	King Enterprises	A
	* Contact	Jason King	
	* Salesman	Abigail Milne	
	* Subject	New product range cold call	
	Information	Review client requirements	
	* Value	7500	
	Case Type	Machine Sale	Source Type The type of source
	Case Date	17 Jul 2019	Expected Completion 24 Jul 2019
	Attachments	Attached files	Browse
		Please note, new files will only be added current date and time will be appended	d to the case when it is saved. If an attachment with the same name already exists, the to the file name.
			No data to display
Related Customers	Related Customers	Titan Group; TIA001	
		Hope Works - HOP001	
		🖪 Titan Group - TIA001	III III III III III III III III III II
- Case State	* Case State	Interested (20%)	
	Percentage	20%	
- Activity	* Type	Phone call	
	Address	2 Upton Road Upton Town Upton City	
	* Subject	Phone call to discuss present client requ	uirements and give overview of new product range.
	<b>A</b>	Culture and the sector Medale sector	
	Comments		
Activity Attendees	Attendees		
	Accondeed	1 k Attendee Name	Customer Name
	6	Accounts Contact	Hope Works
	9	Duncan McCreddie	Hope Works
	Send Email Invites	🔲 🌯 Jackie Samuels 🛛 🚩	Hope Works
	in the second	Jackie Sutherland	Titan Group
Schedule	Date	18 J Jane, Alrich.	Hope Works
	Reminder	Emai Jason King	King Enterprises
+ Quote		John West	Hope Works 👻
			· · · · · · · · · · · · · · · · · · ·
		1	
		🗎 Sa	ve
2			

- 1. The <u>additional</u> Attendee Name will populate the Related Customers field.
- 2. Click on the *plus*[+] button.



CCM Example Company		Abigail Milne 🌣
📞 Save Activity		🔶 🚍
- Case	* Customer	King Enterprises
	* Contact	Jason King
	* Salesman	Abigail Milne
	* Subject	New product range cold call
	Information	Review dient requirements
	* Value	7500
	Case Type	Machine Sale Source Type The type of source
	Case Date	17 Jul 2019 Expected Completion 24 Jul 2019
	Attachments	Attached files Browse
		Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.
		No data to display
Related Customers	Related Customers	😌 Titan Group; TIA001
		Hope Works - HOP001
		🕅 Titan Group - TIA001 🔟
- Case State	* Case State	Interested (20%)
	Percentage	20%
- Activity	* Type	Phone call
	Address	2 Upton Road Upton Town Upton City
	* Subject	Phone call to discuss present client requirements and give overview of new product range.
	2 Comments	Customer currently rents Model: xxyyx
Activity Attendees	Attendees	Jackie Sutherland     Kelly Jones
		Page 1 of 1 (1 items) < [1] Page size: 10
	Send Email Invites	*note that invitations can only be sent to attendees with valid email addresses
- Schedule	Date Reminder	18 Jul 2019 from 11:00 to 12:00 Email SMS 30 minutes before scheduled start
+ Quote		
		B Save

- 1. The additional *Attendee Name* will now populate the data grid.
- 2. Note the *additional bin* to enable you to <u>remove</u> this additional attendee, if required.
- 3. Note that the *Page Reference* field has updated to reflect the additional attendee:
  - (Page 1 of 1 ( <u>2</u> items).

You can continue to add attendees in this way until you have <u>all</u> the attendees required, listed in the data grid.

- 4. Send Email Invites: Select this check box if you wish to invite these attendees via *email*.
  - Each attendee must have a <u>valid email address set up</u> to receive an email invitation.



CCM Example Cor	mpany		Abigail Milne 🔅
📞 Save Act	ivity		
- Case	* Customer	King Enterprises	· · · · · · · · · · · · · · · · · · ·
	* Contact	Jason King	
	* Salesman	Abigail Milne	
	* Subject	New product range cold call	
	Information	Review client requirements	
	* Value	7500	
	Case Type	Machine Sale	Source Type The type of source
	Case Date	17 Jul 2019	Expected Completion 24 Jul 2019
	Attachments	Attached files	Browse
		Please note, new files will only be added to the current date and time will be appended to the fi	ase when it is saved. If an attachment with the same name already exists, the e name.
			No data to display
Related Customers	Related Customers	• Titan Group; TIA001	
		Hope Works - HOP001	
		🖪 Titan Group - TIA001	
- Case State	* Case State	Interested (20%)	
	Percentage	20%	
- Activity	* Type	Phone call	
	Address	2 Upton Road Upton Town Upton City	
	* Subject	Phone call to discuss present client requirement	s and give overview of new product range.
	Comments	Customer currently rents Model: xxyyx	٦
Activity Attendees	Attendees	3 Jackie Sutherland	4
	A SCHOOL ST	L Kelly Jones	
		1 Jackie Sutherland	
		Page 1 of 1 (2 items) 🤇 [1] 🔁 👘	Page size: 10 🖂
	Send Email Invites	*note that invitations can only be sent to at	endees with valid email addresses
- Schedule	4 Date Reminder	18 Jul 2019 from 11:00 to 12:00 Email SMS 30 minutes before schedule	d start
-h. Ousta			.*
		🖹 Save	

#### **SCHEDULE**

- 1. The *Date* and *Time* of this Activity will auto populate with the current date and time.
- 2. Either type an alternative date directly into this field or click in the drop-down arrow.



CCM Example Con	npany	Abigail Milne 🍄
📞 🛛 Save Acti	vity	🔶 🗎
r	Case Date	17 Jul 2019 Expected Completion 24 Jul 2019
	Attachments	Attached files Browse
		Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.
		No data to display
Related Customers	Related Customers	C Titan Group; TIA001
		Hope Works - HOP001
		Titan Group - TIA001
- Case State	* Case State	Interested (20%)
	Percentage	20%
- Activity	* Type	Phone call
	Address	2 Upton Road Upton Town Upton City
	* Subject	Phone call to discuss present client requirements and give overview of new product range.
	Comments	Customer currently rents Model: xxyyx
Activity Attendees	Attendees	Jackie Sutherland
		1 Kelly Jones
	2	1 Jackie Sutherland
		Page 1 of 1 (2 items) 🥑 [1] 🗇 🧥 Page size: 10 🔍
	N N	*note that invitations can only be sent to attendees with valid email addresses
- Schedule	Date Reminder	T18 Jul 2019 rom 11:00 to 12:00 Email: Suminutes before scheduled start
+ Quote		
		🖺 Save

- 1. The calendar function will pop up.
- 2. Select an alternative date, if required.

CCM Example Comp	oany	Abigail Milne	\$
📞 Save Activ	vity	🔶 🖉	7
-	Case Date	17 Jul 2019 Expected Completion 24 Jul 2019	
	Attachments	Attached files Browse	
		Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.	
		No data to display	-
Related Customers	Related Customers	G Titan Group; TIA001	
		R Hope Works - HOP001	
		🕅 Titan Group - TIA001	į.
- Case State	* Case State	Interseted (20%)	
	Percentage	20%	
- Activity	* Type	Phone call	-
	Address	2 Upton Road Upton Town Upton City	
	* Subject	Phone call to discuss present client requirements and give overview of new product range.	
	Commente	V July 2019 > W	
	Comments	Sun Mon Tue Wed Thu Fri Sat	
		7 8 9 10 11 12 13	-
Activity Attendees	Attendees	<sup>29</sup> 14 15 16 17 18 19 20	
	2—	22 23 24 25 26 27	1
			1
		Page size: 10 V	4
	Send Email Invites	Today Clear sent to attendees with valid email addresses	-
- Schedule	Date	V 13ul 2019 from 11:00 to 12:00	
	Reminder	Email SMS 30 minutes before scheduled start	
+ Quote			
			-
		E Caus	



#### In the time *from* and *to* fields:

- 1. Either type the alternative time directly in the field,
- 2. Or, click in the field to display directional arrows, use these to select an alternative time.

CCM Example Co	mpany		Abigail Milne 🌣
📞 Save Act	ivity		<del>(</del>
	Case Date	17 Jul 2019 Expected Completion 24 Jul 2019	
	Attachments	Attached files	Browse
		Please note, new files will only be added to the case when it is saved. If an attachment with the same nam current date and time will be appended to the file name.	e already exists, the
		No data to display	
Related Customers	Related Customers	S Titan Group; TIA001	
		Hope Works - HOP001	<b></b>
		Titan Group - TIA001	缸
- Case State	* Case State	Interested (20%)	
	Percentage	20%	
- Activity	* Type	Phone call	
	Address	2 Upton Road Upton Town Upton City	
	* Subject	Phone call to discuss present client requirements and give overview of new product range.	
	Comments	Customer currently rents Model: xxyyx	
Activity Attendees	Attendees	S Jackie Sutherland	
		L Kelly Jones	<b>İ</b>
		▲ Jackie Sutherland	<u>iii</u>
		Page 1 of 1 (2 items) < [1] > as	Page size: 10 🖂
	Send Email Invites	$\hfill\square$ *note that invitations can only be sent to attendees with valid email addresses	
- Schedule	Date Reminder	18 Jul 2019 from ∰ 100 to 12:00 ← 0	
+ Quote		2	-
		E Save	

#### **REMINDER EMAIL / SMS**

- 1. **Reminder Email**: Select this check box if you wish to have a reminder email sent to you, 30 minutes before the Activity start time.
- 2. **Reminder SMS**: Select this check box if you wish to have a reminder SMS sent to you, 30 minutes before the Activity start time.
  - Note: These reminders will <u>only</u> work if your mobile number and email address have been configured in BPO2.



#### **SAVE ACTIVITY**

You can now skip the next few steps and Save the activity if you do not wish to add a quote. Otherwise follow the process below to add a quote.

## **ADD A QUOTE - OPTIONAL**

3. Click on the *expand* icon [+] in the Quote frame.

	mpany	A	bigail Milne 🍄
📞 🛛 Save Act	ivity		🔶 🖨
		prease note, new mes will only be abled to the case when it is saved, if an attachment wit already exists, the current date and time will be appended to the file name.	n ule same name
		Company Name.docx	<b></b>
Related Customers	Related Customers	O Titan Group; TIA001 ■ Hope Works - HOP001 ■ Titan Group - TIA001	1
- Case State	* Case State Percentage	Interested (20%) 20%	
- Activity	<ul> <li>Type</li> <li>Address</li> <li>Subject</li> <li>Comments</li> </ul>	Phone call 2 Upton Road Upton Town Upton City Phone call to discuss present client requirements and give overview of new product range. Customer currently rents Model: <u>XXYYX</u>	
Activity Attendees	Attendees Send Email Invites	Jackie Sutherland     Jackie Sutherland     Jackie Sutherland     Kelly Jones Page 1 of 1 (2 items) ( [1] ) (m)     "note that invitations can only be sent to attendees with valid email addresses	Page size: 10 V
- Schedule	Date Reminder	22 Jul 2019 from 11:00 to 12:00 Email SMS 30 minutes before scheduled start	
+ Quote			*
		Ú 2 □ Save	

- 1. The *Quote* section will be expanded to expose the:
  - Quote Financials
  - Add Quotes Items
  - and *Quote Items* frames.
- 2. **Quote Settings**: As the Quote section is expanded, the system will pull through the customer default information and populate the following fields:



- 3. **Quote Contact**: This will populate with the contact selected in the Case section.
  - You can click on the drop-down arrow and select an alternative contact from the drop-down list, if required.

Date: This will populate with the current date.

You can either type directly in this field to change the date, or click on the drop-down arrow and use the calendar function to select an alternative date if required.

**Site**: This will auto populate with the site set up on the customer. **Print Layout**: This will auto populate with Sales Quote.

CCM Example Co	mpany	Abigail Milne 🍄
📞 Save Act	ivity	🗲 🗎
Activity Attendees	Attendees O Jackie Sutherland Jackie Sutherland Kelly Jones Page 1 of 1 (2 items) C [1] Mil Send Email Invites " "note that invitations can only be sent to	Page size: 10 v
- Schedule	Date 22 Jul 2019 from 11:00 to 12:00 Reminder Email ☑ SMS □ 30 minutes before sched	0 uled start
- Quote	A quote will only be created if you add quote line items. Quote settings if Get castomer defaults Quote Contact Jason King Quote Reference Reference Reference Reference Comments Information relating to the quote	Date 19 Jul 2019 * Site Durban * Print Layout SALESQUOTE
- Quote Financials	Currency South African Rand Tax Rate 15.00     Exchange Rate 1.0000	Quote Terms Full Payment COD Commercial Default
- Add Quote Items	Add item 😌 Type to find items Add template 😌 Add sales template items	
Quote Items	Drag a column here	
	No data to di	splay v
	🖹 Save	

1. **Quote Reference**: The system will allocate a reference number as the quote is saved.

**Reference**: Type in a reference for this quote.

**Comments**: Type in a comment / additional information relating to this quote.



#### **QUOTE FINANCIALS**

- Currency: This will auto populate with the currency set up on the customer.
  - You can click on the drop-down arrow and select an alternative currency, if required.

**Tax Rate**: This will auto populate with the tax rate set up on the customer.

**Exchange Rate**: This will auto populate with the exchange rate set up on the customer.

**Quote Terms**: This is the quote repayment factor and should be configured in Static Data: Sales Quote Terms or Repayment Method This will auto populate with Full Payment COD.

> • You can click on the drop-down arrow and select an alternative payment period, if required.

**Commercial**: This will auto populate with the **commercial** set up on the customer.

• You can click on the drop-down arrow and select an alternative commercial, if required.



CCM Example Co	mpany	Abigail Milne 🌻
Save Act	tivity	🗲 🗎
Activity Attendees	Attendees O Jackie Sutherland J Jackie Sutherland Kelly Jones Page 1 of 1 (2 items) C [1] > m Send Email Invites " "note that invitations can only be sent to attendees with valid email addresses	Page size: 10 v
- Schedule	Date 22 Jul 2019 from 11:00 to 12:00 Reminder Email ☑ SMS □ 30 minutes before scheduled start	
- Quote	<ul> <li>A quote will only be created if you add quote line items. Quote settings   Get customer defaults  ✓</li> <li>Quote Contact Jason King</li> <li>Quote Reference Reference</li> <li>Reference Reference</li> <li>Comments Information relating to the quote</li> </ul>	
- Quote Financials	Currency South African Rand     Quote Terms Full Payment Co     Tax Rate 15.00     Commercial Default     Exchange Rate 1.0000	DD
- Add Quote Items	Add item O Type to find items Add template O Add sales template items	
Quote Items	Drag a column here No data to display	
	🖹 Save	

#### ADD QUOTE ITEM

You now have the ability to add single items to a quote.

- Note: For Part Numbers to pull through to this list you need to ensure that the Quote Products are specified.
- In the *Add item* field, start typing the *code* or *description* of the item you wish to link to this quote.



CCM Example Co	mpany	Abigail Milne 🏟
Save Act	ivity	<b>+</b> 🗄
Activity Attendees	Attendees 😯 Jackie Sutherland L Kelly Jones L Jackie Sutherland Page 1 of 1 (2 items) 🤇 [1] 🔉 🛤 Send Email Invites 🗖 "note that invitations can only be sent 1	v to attendees with valid email addresses
- Schedule	Date 22 Jul 2019 from 13:00 to 14 Reminder Email ₪ SMS □ 30 minutes before sch	:00 eduled start
- Quote	<ul> <li>A quote will only be created if you add quote line items. Quote settings  Get customer defaults ✓</li> <li>Quote Contact Jason King Quote Reference Reference Reference Q/KE/001 Comments Quote for old rental machine to be replaced</li> </ul>	Date 19 Jul 2019 * Site Durban * Print Layout SALESQUOTE with a new model.
<ul> <li>Quote Financials</li> </ul>	* Currency South African Rand Tax Rate 15.00 * Exchange Rate 1.0000	Quote Terms Full Payment COD Commercial Default
- Add Quote Items	Add item 😳 🔽 🖌 Add sales template items	
Quote Items	Drag a column here No data to	display
	🗎 Save	

- 1. As you start typing in the field, a *Type*, *Code* and *Description* list of all items on the system, will be displayed.
- 2. The system will filter for the item that you are searching for.
- 3. Select the applicable item from this list.



					Abigail Milne 🕻
tivity					🔶 🗧
Attendees 😧	Jackie Sutherland Kelly Jones Jackie Sutherland ge 1 of 1 (2 items) ( 1] ]	) All	with valid amain	laddroscoc	Page size: 10 💌
Date 22 Reminder Em	Jul 2019 from 1 ail 🗹 SMS 🗌 30 mir	3:00 to 14:00 hutes before scheduled start	with valid enfait	auresses	
A quote will only be created 1     Quote settings     Quote Contact Jas     Quote Reference Q/I     Comments Qu	f you add quote line iter Get customer defaults son King ference KE/001 ote for old rental machin	ns. ne to be replaced with a new	Date * Site * Print Layout model.	19 Jul 2019 Durban SALESQUOTE	
* Currency So Tax Rate 15 * Exchange Rate 1.(	uth African Rand	•	Quote Terms Commercial	Full Payment COD Default	
Add item 😯 Add template 😯	Copier Type Code	Description			#
Drag a column here	INVN SP19-123456 INVN SP19-123456 INVN SP204	Sprine Copier K147 Kyocera Colour Copier Konica Minolta Colour Multi-FU SP19-12 Colour Copier SP204 Colour Copier	Inctional Copier	2	1 12 13 20 22 26
	ivity Attendees  Attendees  Send Email Invites  Send Email Invites  Date 22 Reminder Em  A quote will only be created  Quote settings  Quote Reference Q/ Comments Qu  Comments Qu  Comments Qu  Comments Qu  Comments Qu  Comments Qu  Drag a column here	Attendees       ③ Jackie Sutherland         I Kelly Jones       I Jackie Sutherland         Page 1 of 1 (2 items)       [1]         Send Email Invites       "note that invitations of         Date 22 Jul 2019       from 1         Reminder Email Ø SMS       30 min         * A quote will only be created if you add quote line iter         Quote settings       I cet customer defaults         * Quote Contact Jason King         Quote Reference       Reference         Reference Q/KE/001       Comments Quote for old rental machin         * Currency South African Rand       Tax Rate 15.00         * Exchange Rate 1.0000       Add item ②         Add template ③       Topic         Drag a column here       INVN         INVN       SP2020         INVN       SP203         INVN       SP204	Attendees       ③ Jackie Sutherland         I Kelly Jones       I Jackie Sutherland         Page 1 of 1 (2 items)       [1] ) ▲         Send Email Invites       "note that invitations can only be sent to attendeed         Date 22 Jul 2019       from 13:00 to 14:00         Reminder Email Ø SMS       30 minutes before scheduled start         * A quote will only be created if you add quote line items.         Quote settings       Get oustomer defaults         * Quote contact Jason King         Quote Reference       Reference Q/KE/001         Comments       Quote for old rental machine to be replaced with a new         * Currency South African Rand       Tax Rate 15:00         * Exchange Rate       1:000         Add template       Opier         Wrivi       \$92020       \$92020 Sprint Colour Multi Fu         Wrivi       \$92020       \$92020 Sprint Colour Multi Fu         Drag a column here       Wrivi       \$92020       \$9701 Colour Gouer         Wrivi       \$92020       \$9701 Colour Gouer       \$919:122355       \$919:12260	Attendees       Jackie Sutherland         I Kelly Jones       Jackie Sutherland         Page 1 of 1 (2 items)       [1] > m         Send Email Invites       "note that invitations can only be sent to attendees with valid email         Date 22 Jul 2019       from 13:00 to 14:00         Reminder Email © SMS       30 minutes before scheduled start         * A quote will only be created if you add quote line items.       Quote contact Jason King         Quote contact Jason King       © Terrint Layout         Comments Quote for old rental machine to be replaced with a new model.       * Site         * Currency South African Rand       Quote Terms         Tax Rate       1.0000       Add item O         Add item O       Opier       SP2020 Spint Colour Mult Functione Copier         INVIN       SP2020       Spint Colour Mult Functione Copier         INVIN       SP2020       Spint Colour Mult Functione Copier         INVIN       SP2020       Spint Colour Mult Functione Copier         INVIN       SP3053       Start Noise Colour Copier         INVIN       SP3042       SP3042 Colou Copier	Attendees       Jackie Sutherland         I Kelly Jones       Jackie Sutherland         Page I of 1 (2 items)       [1] )         Send Email Invites       "note that invitations can only be sent to attendees with valid email addresses         Date 22 Jul 2019       from 13:00 to 14:00         Reminder Email Ø SMS       30 minutes before scheduled start         "A quote will only be created if you add quote line items.       Quote settings         Quote settings       Cet customer defaults         "Quote contact Jason King       Date 19 Jul 2019         Quote Reference       "Site Durban         Reference QVEE/001       "Print Layout SALESQUOTE         Comments       Quote for old rental machine to be replaced with a new model.         "Currency South African Rand       Quote Terms Full Payment COD         Commercial Default       Strip Spoze         Add template       INVN         SP1912       Strip Spoze         Intra spin Spin Spin Spin Spin Colour Multi Functione       Copier         INVN       SP1020       Spin Spin Spin Colour Multi Functione         Drag a column here       INVN       SP1020       Spin Spin Colour Multi Functione         INVN       SP1020       Spin Spin Colour Multi Functione       Copier         INVN       SP1040<

- 1. The selected item code and description will populate the *Add* item field.
- 2. Click on the *plus*[+] button.



	ompany				Abigail Milne 🌣
Save Ac	tivity				🔶 🗎
	Comments	Customer currently rents Model: XXYXX			-
Activity Attendees	Attendees Send Email Invites	<ul> <li>Jackie Sutherland</li> <li>Kelly Jones</li> <li>Jackie Sutherland</li> <li>Page 1 of 1 (2 items) c [1] &gt; AI</li> <li>"note that invitations can only be so</li> </ul>	ent to attendees with valid emai	l addresses	Page size: 10 🗸
- Schedule	Date Reminder	22 Jul 2019 from 13:00 to Email ☑ SMS □ 30 minutes before	14:00 scheduled start		
- Quote	A quote will only be creat Quote settings Quote Contact Quote Reference Reference Comments	ed if you add quote line items. a Get customer defaults Jason King Reference Q/KE/001 Quote for old rental machine to be repla	Date * Site * Print Layout aced with a new model.	19 Jul 2019 Durban SALESQUOTE	
<ul> <li>Quote Financials</li> </ul>	* Currency Tax Rate 2 <u>Exchange</u> Rate	South African Rand 15.00 1.0000	Quote Terms Commercial	Full Payment COD Default	
- Add Quote Items	Add item Add template	INVN   SP2020   SP2020 Sprint C           Add sales template items	Colour Multi Functional Copier		
Quote Items	Drag a column here	No di	ata to display		
		🖹 Save			

- 1. The item will be added to the *Quote Items* frame.
- 2. You will note that there are **2** action buttons linked to this item.
  - i. An *Edit* button. This will enable you to <u>edit</u> the item details e.g. quantity, price, if required.
  - ii. A *Delete* button. This will enable you to <u>delete</u> the item from the quote, if required.

#### EDIT QUOTE ITEM

3. Click on the *Edit* button.



Save A	ctivity									
			1 Jackie Suther	rland						Ē
			Page 1 of 1 (2 items	s) < [1] > Al					Paç	je size: 10 🖂
	Send	Email Invites	*note that in	nvitations can or	nly be sent to a	attendees with	valid email add	resses		
- Schedule		Date Reminder E	22 Jul 2019 Email 🗹 SMS 🗌	from 13:00 ] 30 minutes	to 14:00 before schedu	iled start				
- Quote	* A quote will Q	only be create	d if you add quo	ote line items. Iefaults						
	<b>*</b> q	uote Contact	Jason King				Date 1	9 Jul 2019		
	Que	ote Reference					* Site D	urban		
		Reference (	Q/KE/001			*	Print Layout S.	ALESQUOTE		
		Comments (	Quote for old rei	ntal machine to	be replaced wi	th a new mode	el.			
- Quote Financials		* Currency	South African Ra	and		C	Quote Terms Fi	ull Payment COE	)	
Quote Financials		* Currency Tax Rate	South African Ra 15.00	and		C	Quote Terms Fi Commercial D	ull Payment COE efault	)	
- Quote Financials	- E	* Currency Tax Rate xchange Rate	South African Ra 15.00 1.0000	and		C	Quote Terms Fi Commercial D	ull Payment COE efault	)	
<ul> <li>Quote Financials</li> <li>Add Quote Items</li> </ul>	·- E	* Currency Tax Rate xchange Rate Add item	South African Ra 15.00 1.0000 Type to fir Add sales	and nd Items template items		C	Quote Terms Fi Commercial D	ull Payment COE efault	)	
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<ul> <li>Quote Financials</li> <li>Add Quote Items</li> <li>Quote Items</li> </ul>	E Item Type INVN	* Currency Tax Rate xchange Rate Add item Add template Item Code SP2020	South African Ra 15.00 10000 Type to fir Add sales Quote Item Description SP2020 SP207 Colour Multi Functional Copier	and nd items template items Quantity 1	Unit Cost 5610.67	Item Price 5400.00	Quote Terms Fi Commercial D Payment per Period	Ull Payment COD efault Total 5400.00 3	Actions	Total Inclusive 6210.00

1. An *edit item* frame will be displayed.

Here you can make changes to the following details:

- 2. Item Description
- 3. Item Quantity
- 4. Item Unit Cost
- 5. Item Price
- Click on the *Apply Changes* icon [] to <u>save</u> your changes or the the *Cancel changes* icon [x] to <u>cancel</u> the changes, as required.



Save Ac	civicy									
			Page 1 of 1 (2 items	5) 🔇 [1] 🔈 Al					Pag	e size: 10 🖂
	Send	Email Invites	*note that in	vitations can o	nly be sent to a	attendees with	valid email a	ddresses		
- Schedule		Date Reminder	22 Jul 2019 Email 🗹 SMS 🗆	from 13:00 30 minutes	to 14:00 before schedu	) Jed start				
- Quote	" A quote will Q	only be create uote settings	ed if you add quo	ote line items. Iefaults 🖌						
	* Q	uote Contact	Jason King				Date	19 Jul 2019		
	Que	ote Reference	Reference				* Site	Durban		
		Comments	Quote for old rer	ntal machine to	be replaced wi	ith a new mode	l.			
<ul> <li>Quote Financials</li> </ul>		* Currency	South African Ra	and		ç	uote Terms	Full Payment CO	0	
		Tax Rate	15.00				Commercial	Default		
	* E:	xchange Rate	1.0000							
- Add Quote Items		Add item Add template	<ul><li>Type to fir</li><li>Add sales</li></ul>	nd items template items						
Quote Items	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive
	INVN	SP2020	SP1919 Sprint Colour Multi Functional Copier	1	5610.67	5400.00		5400.00		6210.00
0—	Quote Item [	Description: SP2	020 Sprint Colc	Quantity: 1	<b>≜</b>	Unit Cost: 50	510.674500	Item Price	5400.00	<

 In this example, the changes have been <u>cancelled</u> and the original item details remain.

#### LINK ADDITIONAL QUOTE ITEMS

In the *Add item* field, start typing the *code* or *description* of the <u>next</u> item that you wish to add to the quote.



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ACTIVITY ATTENDEES	Send	Attendees	Jackie Sut Kelly Jones Jackie Suther Page 1 of 1 (2 items	herland (land () (1) ) (1) (1)	nly be sent to a	attendees with	valid email addr	esses	Pag	e size: 10 💌
- Schedule		Date Reminder E	22 Jul 2019 Email 🗹 SMS 🗌	from 13:00 ] 30 minutes	to 14:00 before schedu	led start				
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Quote Items	Item Type	Item Code SP2020	Quote Item Description SP2020 Sprint Colour Multi Functional Copier	Quantity 1	Unit Cost 5610.67	Item Price 5400.00	Payment per Period	Total 5400.00	Actions	Total Inclusive 6210.00
					5610.67	5400.00	0.00	5400.00		6210.00

- 1. As you start typing in the field, the *Type*, *Code* and *Description* list will again be displayed.
- 2. The system will filter for the item that you are searching for.
- 3. Select the applicable item from this list.



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Save Act	tivity								🔶 🗄
ACTIVITY ATTENDEES	Send	Attendees	Jackie Kelly Jon Jackie Su Page 1 of 1 (2 i	Sutherland es therland tems) < [1] > at invitations ca	All n only be sent to atter	ndees with val	lid email a	ddresses	Page size: 10 💌
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				B	Save	5400.00	0.0		6210.00

- 1. The additional item code and description will populate the *Add* item field.
- 2. Click on the *plus* [+] button.



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Activity Attendees	Send Em	Attendees . ail Invites [	<ul> <li>Jackie Sut</li> <li>▲ Kelly Jones</li> <li>▲ Jackie Suther</li> <li>Page 1 of 1 (2 items</li> <li>■ *note that in</li> </ul>	herland land ) C [1] > A witations can of	nly be sent to a	attendees with	valid email addr	esses	Pag	10 v
- Schedule		Date 2 Reminder E	22 Jul 2019 mail 🗹 SMS 🗆	from 13:00 30 minutes	to 14:00 before schedu	led start				
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<ul> <li>Quote Financials</li> <li>Add Quote Items</li> </ul>	Quote	Reference Comments Co	Conception Concep	atal machine to and 20-147K   Blac template items	be replaced wi	C	Print Layout SA I. uote Terms Ful Commercial De	LESQUOTE II Payment COE fault	)	
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<ul> <li>Quote Financials</li> <li>Add Quote Items</li> <li>Quote Items</li> </ul>	Quote C 2 Exch Add Item Type INVN S	Reference Reference Comments C	VKE/001 Quote for old rer South African Ra 15.00 I.0000 I.0000 INVN I 20 Add sales Quote Item Description SP2020 Sprint Colour Multi Functional Copier	and 20-147K   Blac template items Quantity 1	be replaced wi k toner SP202( Unit Cost 5610.67	th a new mode	Print Layout SA I. Juote Terms Ful Commercial De Payment per Period	II Payment COD fault Total 5400.00	Actions	Total Inclusive 6210.00

- 1. The <u>additional</u> item will be added to the **Quote Items** frame.
- 2. Edit the details, if required.
- 3. The quote *Total Inclusive* amount will update to include this item.

## **SAVE ACTIVITY**

4. When you have finished adding items to the Quote sections, click on *Save*.



	Page 1 of 1 (2 items) 🥑 🚺								Page size: 10 🔍	
	Send	Email Invites	*note that in	vitations can or	nly be sent to a	attendees with	valid email ad	dresses		
Schedule	Date 22 Jul 2019 from 13:00 to 14:00 Reminder Email 🗹 SMS 🗆 30 minutes before scheduled start									
- Quote	<ul> <li>A quote will only be created if you add quote line items.</li> <li>Quote settings R Get customer defaults</li> <li>Quote contact Jason Kinn</li> </ul>						Date 1	9 101 2019		
	Ouote Reference Reference					* Site Durban				
		Reference Q/KE/001					* Print Layout SALESQUOTE			
Quote Financials	Currency South African Rand Tax Rate 15.00					Quote Terms Full Payment COD Commercial Default				
Add Quote Items		Add item	<ul> <li>              Type to      </li> <li>             Add sales         </li> </ul>	find items template items	50					
Quote Items	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive
	INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	1	5610.67	5400.00		5400.00 2	0	6210.0
	INVN	2020-147K	Black toner SP2020	1	481.70	526.63	526.63	526.63	0	605.6
0—										

- You will return to the Homepage.
- The 1 Month Performance and 4 Month Pipeline graphs will update to include the new quote statistic.





#### **Related Topics**

• View / Print / Email the Quote

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