

CRM BASICS

COLD CALL

- A Cold Call is a quick and easy way to raise a new Customer, Contact, Address, Case and Activity.
- A Cold Call can also be created for existing customers.
- A Cold Call for New or Existing Customers can be created from the *Homepage* or the *Customer Homepage*. Either of these processes will direct you to the Create Cold Call screen with the Customer frame clear of any details.
- A **Create Cold Call for Customer** Action button has been added to the Customer Dashboard Information frame. Navigating from this button will auto populate the selected Customer Details.

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

ACCESS COLD CALLS FROM CUSTOMER DASHBOARD

• Click on the *Customers* tile from the *Dashboard*.



CCM BPO2 Test Environment		Judith Mudzengi 🍄 🏠
🖾 Dashboard		Search Q
Description larget Existing Custmins Nothing to display	Lustmrs 0.50 0.60 0.20 0.02 0.4 0.6 0.8 1	Fetching data
17 Jan 2019 0 Create cold call Calebres	Today Recent Calendar Phone call - Hope Works: Advertise Products When: 10 Sep 2019, 15:00-16:00 When: 10 Sep 2019, 15:00-16:00 Whe: 30:10234567 Email: join@email.coza Email: join@email.coza When: 9 Sep 2019, 15:00-16:00 When: 9 Sep 2019, 15:00-16:00 When: 9 Sep 2019, 15:00-16:00 When: 9 Sep 2019, 15:00-16:00 When: 9 Sep 2019, 15:00-16:00 When: 30 hom Smith, Hope Works Tel: 0311234567 Email: join@email.coza Page 1 of 1 (2 tens) @ [1]) D @ Page 1 of 1 (2 tens) @ [1]) D @	Cell: Bus: 031 123 4567 Cell: Bus: 031 123 4567 Page size: 10 v
. Comparison Application	©2019 C03 Technologies (Pty) Ltd (3.5.5.1 / 3.5.5.1)	

- The *Customers* screen will be displayed.
- A list of customers will be displayed.

C2 0	BPO2 Test Environment							Judith I	Mudzen	gi 🍄 🍧
Ħ	Customers								÷	C)
	Type Customer name search filter here						۹			- 1
View	Customer	Code	Contact	Contact phone	Contact email	Complet	Status	Rank	Active	Call Contact
?	24 Hour HCCP	71509643	Another Person	345678		50%	New - CRM	Diamond	No	Yes
?	3Rd Generation Client-Server	71505527	Abigail Milne	031 234 567	abi@noname.com	75%	New - CRM		No	Yes
?	43305 Scalable	71505435				25%	Active		Yes	No
?	Adapter Holistic	71505360				25%	New - CRM		No	No
?	Adult Education Zope	71505302				25%	New - CRM		No	No
?	Advanced Feedmix	71505323				25%	New - CRM		No	No
?	Advanced Kimmel	71505324				25%	New - CRM		No	No
?	Aerospace Engineering Kubuntu	71505310				25%	New - CRM		No	No
?	Aimbu Yoveo	71505346				25%	New - CRM		No	No
?	Alliance IAR Embedded Workbench	71505341				25%	Active		Yes	No
Page 1 of	29(285 Hame) (1) [1] 2 3 4 5 6 7 27 28 29 5 (4)								Pane size	10
eage 1 of	es lean usual In Tel 7 7 3 5 7 77 75 75 15 191								Page Size	- IV M

- Type in the *customer name* that you wish to create a cold call for in the *Search* bar.
- 2. The system will filter for and display that customer in the list.
- 3. Click on the *Customer icon* in the *View* column.





The *Customer Dashboard* screen will be displayed.

- CCM BPO2 Test Environment Judith Mudzengi 🌣 🕀 Searc Q Trading Name Hope Works Registered Name Hope Works Description VAT No 75% Q A Rank Silver Website http:// Phone 031 123 4567 щ ÷ 12 Months Sales History J 0.5 0.45 0.35 0.3 0.25 0.2 0.15 0.1 0.05 0 \mathbf{O}_{a}^{a} ക്ര
- Click on the *Create Cold Call* tile.

The Create Cold Call screen will be displayed.

- 1. Click on the [] sign to view more details.
- 2. Click on the [+] sign to view less details.



CCM BPO2 Test E	nvironment		Judith Mudzengi 🌣
📞 Create C	old Call		🔶 🖪
Customer	* Customer Type new customer name or search for existing customer * Rank: Select customer's rank Reg. No: Registration number	" Type The customer type VAT No VAT number	
- Contact	 Full name Contact's full name Telephone Contact's telephone number 	Email Email address	
+ Address			
- Case	* Subject: The subject of the case Information: Additional information relating to the case		
2	" Value 0 Case Type of Case	Source Type The type of source	
+ Related Customers			
- Next Activity	 Salesman Salesman assigned to this customer Type Type of activity Subject The subject of the activity Comments Additional information relating to the activity 		
+ Activity Attendees			
- Schedule	When 10 Sep 2019 from 18:00 to 19:00 Reminder Email SMS 30 minutes before scheduled start		
Submit Options	Show customer after save 🕑		
	🖺 Save		

ACCESS COLD CALLS FROM THE DASHBOARD

- CRM BPO2 Test Environment Judith Mudzengi 🌣 Dashboard 🕀 Sear Q Performance Activities for Last 30 Days Existing New Custmrs Today Recent Calendar Status Schedule Date \mathbb{Q} ¥ A Phone call - Riverside Investments: Market New Products When: 13 Sep 2019, 11:00-12:00 Who: Joel Reeds, Riverside Investr Tel: 031 210 455 Email: joelreeds@email.com Cell: Bus: 031 210 455 Ë ш ÷ Page 1 of 1 (1 items) 📧 🗧 [1] 🕨 🛝 Page size: 10 🖂
- 1. Click on the *Create Cold Call* in the *Dashboard* (Home page).

The *Create Cold Call* screen will be displayed.



- 1. Click on the [] sign to view more details.
- 2. Click on the [+] sign to view less details.

CCM BPO2 Test E	invironment		Judith Mudzengi 🌣
📞 Create C	old Call		🔶 🗃
Customer	* Customer Type new customer name or search for existing customer * Rank Select customer's rank Reg. Nor Registration number	" Type The customer type VAT No VAT number	
- Contact	 Full name Contact's full name Telephone Contact's telephone number 	Email Email address	
+ Address			
- Case	* Subject The subject of the case Information Additional information relating to the case		
2	← Value 0 Case Type of Case	Source Type The type of source	
+ Related Customers			
- Next Activity	 Salesman: Salesman assigned to this customer Type: Type of activity Subject: The subject of the activity Comments: Additional information relating to the activity 		
+ Activity Attendees			
- Schedule	When 10 Sep 2019 from 18:00 to 19:00 Reminder Email SMS 30 minutes before scheduled start		
Submit Options	Show customer after save 🕑		
	🖺 Save		

CREATE COLD CALL FOR NEW CUSTOMER

Customer F rame

- Customer:
 - 1. For a <u>new</u> customer, type in the Customer Name.
 - 2. As you type, companies with similar names will appear to help prevent duplicates.



	nvnonment	Judith Mudzengi
📞 Create C	old Call 🔎	← 🗄
- Customer + Salesmen - Contact	Customer TR/ Fance Soften Fance Fa	
+ Audress		
	Information Additional information relating to the case Value 0 Case Type The type of Case Source Type The type of source	
+ Related Customers		
- Next Activity	 Salesman Salesman assigned to this customer Type Type of activity Subject The subject of the activity Comments Additional information relating to the activity 	
+ Activity Attendees		
- Schedule	When 11 Sep 2019 from 11:00 to 12:00 Reminder Email SMS 30 minutes before scheduled start	
	Show customer after save II	

- **Rank:** Click on the *drop-down arrow* and select the relevant rank.
- **Reg No:** Type in the company registration no, if applicable.
- **Type:** Click on the *drop-down arrow* and select the relevant type.
- VAT No: Type in the company VAT number, if applicable.

CRM BPO2 Test B	Environment	Judith Mudzengi 🌣
📞 Create C	old Call	🗲 🗃
- Customer	Customer Riverside Investments Rank Select customer's rank Reg. No. Registration number	► Type The customer type VAT No VAT number
+ Salesmen		
- Contact	 Full name Contact's full name Telephone Contact's telephone number 	Email Email address
+ Address		
- Case	Subject The subject of the case. Information Additional information relating to the case.	
	Value 0 Case Type Type of Case	Source Type The type of source
+ Related Customers		
- Next Activity	 Salesman Judith Mudzengi Type Type of activity Subject The subject of the activity Comments Additional information relating to the activity 	
+ Activity Attendees		
- Schedule	When 11 Sep 2019 from 12:00 to 13:00 Reminder Email SMS 30 minutes before scheduled start	
Submit Options	Show customer after save 🔽	
	🖬 Save	



Salesmen Frame

• Select the checkboxes in front of the salesmen that will be linked to this customer. These marked salesmen will be available for selection if you are raising this cold call to assign to another salesman.

CCM BPO2 Test	t Environment		Judith Mudzengi 🕯
📞 Create	Cold Call		🗲 🛙
- Customer	 Customer Riverside Investment Rank Diamond (5 days) Reg. No 789065 	3	" Type Construction VAT No 908754637
- Salesmen	Abigai Milne Adele Weeder Alex Spagneherg Adromach Joselwitch Andromach Joselwitch Angle Roseborough Armande Palchelt Art Huelin	Chris Haynes CG3 Admin Colin Holden Dalee Pilay Darryl Muller Deble Lugar Derrick Weeder Edveld Maskva	Judish Mudangi Kashmira Kirghin Kassa Katikand Kim Bngelkrecht Lucky Mavuya Malary Allikon Marc Regala Maric Engelsrecht
- Contact	 Full name Contact's full name Telephone Contact's telephone I 	number	Email Email address
+ Address			
- Case	* Subject The subject of the ca Information Additional information	se n relating to the case	
	* Value 0 Case Type Type of Case		Source Type The type of source
+ Related Customers			
- Next Activity	 Salesman Judith Mudzengi Type Type of activity Subject The subject of the ac Comments Additional information 	tivity relating to the activity	
+ Activity Attendees			
- Schedule	When 11 Sep 2019 from Reminder Email SMS	12:00 to 13:00 30 minutes before scheduled start	
Submit Options	Show customer after save 🕑		
		🖹 Save	

Contact Frame

- Full Name: Type in the full name of the customer contact.
- **Telephone:** Type in the telephone number of the customer contact.
- Email Address: Type in the email address of the customer contact.



CRM BPO2 Test B	Environment			Judith Mudzengi 🌣
📞 Create C	old Call			🔶 🗎
- Customer	 Customer Riverside Investments Rank Diamond (5 days) Reg. No 789065 		[∞] Type Construction VAT No 908754637	*
- Salesmen	Abigail Milne Adele Weeder Alex Spangenberg Alerefa Teacy Andromache Joselevitch Angle Rosebrough Armando Reichelt	Chris Haynes Co3 Admin Colin Holden Dalene Pillay Darnyl Nuller Darnyl Nuller Derbie Lugar Derrick Weeder	Judith Mudzengi Kashmira Mirghin Kessia Maitland Kim Engelbrecht Lucky Mawuye Malory Allibon Marc Repsold	•
- Contact	* Full name Contact's full name * Telephone Contact's telephone nu	mber	Email Email address	←
+ Address				
- Case	Subject The subject of the case Information Additional Information r Value 0	relating to the case		
+ Related Customers	Case type Type of Case		Source type the type of source	
- Next Activity	 Salesman Judith Mudzengi "Type Type of activity Subject: The subject of the activic Comments: Additional information of the activic Comments." 	ity relating to the activity		
+ Activity Attendees				
- Schedule	When 12 Sep 2019 from Reminder Email SMS 30	11:00 to 12:00 minutes before scheduled start		•
		🗎 Save		

Address Frame

- Existing: Click on the drop-down arrow and select New.
- Address Line 1 and 2: Type in the relevant customer address details.
- **Suburb:** Type in the name of the suburb.
- **City:** Type in the city.
- Province / State: Type in the Province / State.
- **Post Code:** Type in the postal code.
- **Country:** Type in the country.



CTM BPO2 Test I	Environment			Judith Mudzengi 🌣
📞 Create C	old Call			🔶 🗎
- Customer	* Customer * Rank Reg. No	Riverside Investments Diamond (5 days) 789065	* Type Construction VAT No 908754637	
- Salesmen	Abigail Milne Adele Weeder Alex Spangenberg Almeria Teacy Andromache Joselevitch Angie Roseborough Armando Reichelt Arv Huelin	Chris Haynes 9 C03 Admin Colin Holden Dalene Pillay Darryl Muller Debbie Luga Derrik Weeder Edwell Maskva	Judith Mudsengi Kassia Maitand Kirghin Kassia Maitand Kin Engelbrecht Lucky Maxwae Malory Allibon Marca Regeld Marius Engelbrecht	•
- Contact	* Full name * Telephone	Joel Reeds 031 210 455	Email joelreeds@email.com	
- Address	Existing Address Line 1 Address Line 2 Suburb City Province/State Post Code Country	Address for the contact Address Line 1 Address Line 2 Subarb Gity Province/State Post Code Contry		
- Case	* Subject Information	The subject of the case. Additional information relating to the case		
	* Value Case Type	0 Type of Case	Source Type The type of source	
+ Related Customers	2			
- Next Activity	* Salesman * Type * Subject Comments	Judith Mudzengi Type of activity The subject of the activity Additional information relating to the activity		
+ Activity Attendees				
- Schedule	When Reminder	12 Sep 2019 from 11:00 to 12:00 Email SMS 30 minutes before scheduled start		
Submit Options	Show customer after save			
		🗎 Save		

Case Frame

- **Subject:** Type in the subject of the case.
- **Information:** Type in additional information relating to the case if applicable.
- Value: Type in the estimated value of the case.
- **Case Type:** Click on the drop-down arrow and select from the list, the relevant case type.
- **Source Type:** (Where did you obtain this customer contact e.g. was this customer 'recommended' or 'referred'.) Click on the drop-down arrow and select from the list, the relevant source type.



CRM BPO2 Test	Environment			Judith Mudzengi 🌣
📞 Create C	Cold Call			🗲 🖹
- Customer	 Customer Riverside Investments Rank: Diamond (5 days) Reg. No 789065 		* Type Construction VAT No 908754637	
- Salesmen	Abigail Milne Ade Weeden Aks. Sparspering Ade Streegening Andromache Soneleritch Angle Rossborugh Ammando Reichelt Any Holin	Chris Haynes CO3 Admin Colin Holden Dalene Pillay Darry Muller Darbibi Lugar Darbick Lugar Edwall Maskva	Judith Mudsangi Kashmira Ninghin Kashmira Ninghin Kashmira Ninghin Kashmira Ninghin Kudy Minoya Mayor Alibon Marc Regold Marc Regold	
- Contact	* Full name Joel Reeds * Telephone 031 210 455		Email joelreeds@email.com	
- Address	Existing New Address Line 1 2 Selby Court Address Line 2 7 Collinon Rd Suburb Gillits City Durban Province/State K2N Post Code 4000 Country RSA			
- Case	 Subject The subject of the case Information Additional information relating to th Value 0 	e case		-
+ Related Customers	Case type type or Case		Source type the type of source	
 Next Activity 	 Salesman Judith Mudsengi Type Type of activity Subject The subject of the activity Comments Additional information relating to the 	e activity		
+ Activity Attendees				
- Schedule	When 11 Sep 2019 from 12:00 to Reminder Email SMS 30 minutes bef	5 13:00 fore scheduled start		
Submit Options	Show customer after save 🕑			
		🖪 Save		

Related Customer Frame

You have the ability to link *Related Customers.* This enables you to invite contacts from various clients to an activity - such as a meeting or training session.

If you do <u>not</u> need to link a *Related Customer*, you can move on to the Activity frame.

Add Related Customer

- Click on the drop-down arrow and select the relevant *customer* from the list.
- 2. Click on the [+] button to save this customer to this frame.



CRM BPO2 Test	Environment	Judith Mudzengi 🌣
Create (Cold Call	🗲 🖪
- Customer	* Customer Riverside Investments * Rank. Diamond (5 days) Reg. No. 789065 V	Type Construction AT No 908754637
- Salesmen	Abigail Milne Chris Haynes Adek Weeder GO3 Admin Adex Sanganbarg Colin Holden Andromache Joseborough Andromache Joseborough Armando Reichelt Chris Haynes Armando Reichelt Derrick Weeder Arry Huelin	Judith Mudzengi Kashmize Nighin Kesis Malland Kim Engelbrecht Lucky Maxvuye Marc Repsold Marc Repsold Marc Repsold Marc Repsold
- Contact	 Full name Joel Reeds Telephone 031 210 455 	Email joelreeds@email.com
- Address	Existing New Address Line 1 12 Selly Court Address Line 2 7 Colinton Rd Suburb Gillits Chy Durban Province/State KZN Post Code 4000 Country RSA	
- Case	* Subject Market New Products Information Market New Products * Value 200000	
- Related Customers	Case Type New Customer Source Related Customers No data to display	e Type Referral
- Next Activity	 Selesman Judith Mudzengi Type of activity Subject The subject of the activity Comments Additional information relating to the activity 	
+ Activity Attendees		
- Schedule	When 11 Sep 2019 from 12:00 to 13:00 Reminder Email SMS 30 minutes before scheduled start	
Submit Options	Show customer after save 🕑	
	🖺 Save	

Delete Related Customer

3. Click on the *Delete* icon if you wish to remove a linked related customer.



CTM BPO2 Test	Environment			Judith Mudzengi 🌣
Create C	cold Call			🔶 🖪
- Customer	* Customer	Riverside Investments		<u> </u>
	* Rank Reg. No	Diamond (5 days) 789065	* Type Construction VAT No 908754637	
- Salesmen	Abigail Milne Adele Weeder Alex Spangenberg Almeria Teacy Angie Roseborough Armando Reichelt Are Unalize	Chris Haynes O C03 Admin Colin Holden Datery Multer Dataryl Multer Debbie Lugar Detrick Wede Columnational Materials	Y Judith Mudzengi Kashmira Nirohin Kesia Mališand Kim Engelbrecht Lucky Marvuye Malory Allibon Marc Repsold Marc Repsold	
- Contact	* Full name * Telephone	Joel Reeds 031 210 455	Email joelreeds@email.com	
- Address	Existing Address Line 1 Address Line 2 Suburb City Province/State Post Code Country	New 12 Selby Court 7 Colinton Rd Gillita Durban KZN 4000 RSA		
- Case	* Subject Information * Value	Market New Products Market New Products 200000		
	Case Type	New Customer	Source Type Referral	
- Related Customers	Related Customers	ා Hope Works; HOP0001 H Hope Works - HOP0001		3→⊡
- Next Activity	* Salesman * Type * Subject Comments	Judith Mudzengi Type of activity The subject of the activity Additional information relating to the activity		
+ Activity Attendees				
- Schedule	When Reminder	11 Sep 2019 from 16:00 to 17:00 Email SMS 30 minutes before scheduled start	ξ	
Submit Options	Show customer after save	N		
		🖹 Save		

Next Activity Frame

- Salesman: The person currently logged on to the system will be selected by default. You can assign this Customer, Case and Activity to another salesman, if you are raising this cold call on their behalf.
 - To assign this case to another salesman, click on the *drop-down arrow* and select the relevant salesman.
 - Note: You will only be able to assign the case to one of the salesmen you selected in the Salesmen frame .
- Type: Select the type of Activity, e.g. 'Call'
- **Subject:** Type in the subject of the activity.



• **Comments:** This text box give you the opportunity to type in any additional information relating to the activity.

CCM BPO2 Test E	nvironment			Judith Mudzengi 🌣
📞 Create C	old Call			🔶 🖪
- Customer	* Customer * Rank	Riverside Investments Diamond (5 days) Zonger	* Type Construction	
- Salesmen	Reg. No Abigail Milne Adele Weeder Alex Spangenberg Andromache Joselevitch Angie Roseborough Armando Reichelt Arru Huelin	Zasuba Chris Haynes CO3 Admin Colin Holden Dalene Pillay Darryl Muller Debibe Lugar Debibe Lugar Edwell Maskvra	VAI no 308/3453/ Judith Mudzengi Kashmira Nirghin Kesia Maitland Lucky Mawuye Malory Allibon Marx Repeloid Marus Engelbracht	Ţ
- Contact	* Full name * Telephone	Joel Reeds 031 210 455	Email joelreeds@email.com	
- Address	Existing Address Line 1 Address Line 2 Suburb City Province/State Post Code Country	New 12 Selby Court 7 Colinton Rd Gillita Durban KZN 4000 RSA		
- Case	* Subject Information * Value	Market New Products Market New Products 200000		
- Related Customers	Case Type Related Customers	New Customer O Hope Works; HOP0001 Hope Works - HOP0001	Source Type Reterral	
- Next Activity	* Salesman * Type * Subject Comments	Judith Mudzeng) Type of activity The subject of the activity Additional information relating to the activity	←	
+ Activity Attendees				
- Schedule	When Reminder	12 Sep 2019 from 11:00 to 12:00 Email SMS 30 minutes before scheduled start		
Submit Options	Show customer after save	V		
		🖺 Save		

Activity Attendees Frame

It is only necessary to link Activity Attendees if you want to send email invites to these people to join an activity - such as a meeting. The attendees can accept or reject this request. If they accept, this activity will display as an event on their calendar.

1. The Salesman and Customer Contact will be linked as Activity Attendees by default (and cannot be removed).



- 2. You can also link other employees, case customer contacts and related customer contacts. To do so, click on the *drop-down arrow* and select the person from the list.
- 3. Then click on the ' + ' button.
- 4. Tick the *Send Email Invites* check box if you wish to send email invites to the attendees.
 - *Note:* The *Send Email Invites* option may be selected by default (depending on the BPOCRM configuration).

CRM BPO2 Test I	Environment				Judith Mudzengi 🌣
📞 Create C	old Call				🔶 🗎
- Customer	* Customer * Rank Reg. No	Riverside Investments Diamond (5 days) 789065		* Type Construction VAT No 908754637	
- Salesmen	Abigail Milne Adele Weeder Alex Spangenberg Almeria Teacy Andromache Joselevitch Angie Roseborough Armando Reichelt Arv Huelin	1	Chris Haynes CO3 Admin CO3 Admin Dalene Pilay Darry Muller Debib Lugar Derrick Weeden Edvall Maskva	Judith Mudaengi Judith Mudaengi Jasharar firogan Kon Regalineaht Lucky Manuya Malor y Alloon Mark Repsole Mark Benefecht	•
- Contact	* Full name * Telephone	Joel Reeds 031 210 455		Email joelreeds@email.com	
- Address	Existing Address Line 1 Address Line 2 Suburb City Province/State Post Code Country	New 12 Selby Court 7 Colinton Rd Gillits Durban KZN 4000 RSA			
- Case	* Subject Information	Market New Products Market New Products			
	* Value Case Type	200000 New Customer		Source Type Referral	
- Related Customers	Related Customers	O Hope Works; HOP0001			
- Next Activity	* Salesman * Type * Subject Comments	Judith Mudzengi Phone call Market New Products Market New Products			
- Activity Attendees	Attendees 3 Send Email Invites	*note that invitations can only	Case contact and sale	sman are always made attendees -	
- Schedule	When Reminder	12 Sep 2019 from 11:00 Email SMS 30 minutes (to 12:00 efore scheduled start		
Submit Options	Show customer after save	v			
			🖺 Save		

5. Click on the *Delete* icon if you wish to remove an attendee.



CCM BPO2 Test	Environment				Judith Mudzengi 🏟
📞 Create (Cold Call				🔶 🗎
- Customer	* Customer * Rank Reg. No	Riverside Investments Diamond (5 days) 789065		* Type Construction VAT No 908753637	
- Salesmen	Abigail Milne Adele Weeder Alex Spangenberg Almeria Teacy Andromache Joselevitch Angle Roseborough Armando Reichelt Arry Huelin		Chris Haynes CO3 Admin Colin Holden Dalene Pillay Darryl Muller Debrie Lugar Derrick Weeder Edrull Maskva	 Judith Mudzengi Kasihmira Ninghin Krasih Mathand Krin Engeloracht Lucky Manoye Maior Allbon Marc Repaid Marc Repaid 	*
- Contact	* Full name * Telephone	Joel Reeds 031 210 455		Email joelreeds@email.com	
- Address	Existing Address Line 1 Address Line 2 Suburd City Province/State Post Code Country	New 12 Selby Court 7 Colinton Rd Gilltis Durban KZN 4000 RSA			
- Case	* Subject Information	Market New Products Market New Products			
	* Value Case Type	200000 New Customer		Source Type Referral	
	Related Customers	😌 Hope Works; HOP0001 関 Hope Works - HOP0001			<u></u>
- Next Activity	* Salesman * Type * Subject Comments	Judith Mudzengi Phone call Market New Products Market New Products			
- Activity Attendees	Attendees Send Email Invites	John Smith; Hope Works John Smith Page 1 of 1 (1 items) < [1] > mi "note that invitations can only	be sent to attendees with valid email addresses		5≻⊡
- Schedule	When Reminder	12 Sep 2019 from 13:00 Email SMS 30 minutes be	to 14:00 sfore scheduled start		
	Show customer after save	V			
			🖹 Save		

Schedule Section

- *When:* This field will be auto populated. Click on the *drop-down arrow* and select the relevant date.
- *From:* This field will be auto populated. Use the *up and down arrows* to select the relevant time.
- *To:* This field will be auto populated. Use the *up and down arrows* to select the relevant time.
- *Reminder:* If you wish to send a reminder to your attendees, you can choose whether to send the reminder by *Email* or *SMS*.
 - 1. Tick the *Email* check box if you wish to send the reminder by email.
 - Tick the SMS check box if you wish to send the reminder by SMS.



- 3. '*Reminder Time* ': You can also choose when to send the reminder by clicking on the *drop-down arrow* and selecting the appropriate time period.
 - *Note:* Reminders will only work if your mobile number and email address have been configured in *BPO*.

CCM BPO2 Test	Environment				Judith Mudzengi 🔅
📞 Create (Cold Call				🔶 🗎
- Customer	* Customer * Rank Reg. No	Riverside Investments Diamond (5 days) 789065		 Type Construction VAT No 908753637 	
- Salesmen	Abigail Milne Adele Weeder Alex Spangenberg Almein Teacy Andrein Teacy Andrein Teacy Andrein Teacy Andrein Andreit Angle Roseborough Armando Reicheit Ary Huelin		Chris Haynes Y CO3 Admin Colin Holden Dalene Pillay Darry Muller Debbio Lugar Debbio Lugar Debrik Weeder Edwell Maskva	Judith Mudzengi Kashmira Nirghin Kash Malland Kim Engellenecht Lucky Mawuye Malory Allibon Marc Repsold Marcs Engelsrecht	Í
- Contact	* Full name * Telephone	Joel Reeds 031 210 455		Email joelreeds@email.com	
- Address	Existing Address Line 1 Address Line 2 Suburb City Province/Stable Post Code Country	New 12 Selby Court 7 Colinton Rd Gillita Durban KZN 4000 RSA			
- Case	* Subject Information	Market New Products Market New Products			
	* Value Case Type	200000 New Customer		Source Type Referral	
- Related Customers	Related Customers	O Hope Works; HOP0001			
- Next Activity	* Salesman * Type * Subject Comments	Judith Mudzengi Phone call Market New Products Market New Products			
- Activity Attendees	Attendees Send Email Invites	 John Smith: Hope Works John Smith Page 1 of 1 (1 items) < [1] a million *note that invitations can only be 	sent to attendees with valid email addresses	15	Paga sizar 10 🐷
- Schedule	When Reminder	12 Sep 2019 from 11:00 to Email SMS 20 minute befor	12:00 re scheduled start		
Submit Options	Show customer after save				
		00	E Save		

Submit Options Section

• *Show customer after save:* This will be selected by default. Unselect if you do not wish to see the customer after saving.



CRM BPO2 Test	Environment		Juc	lith Mudzengi 🌻
📞 Create (Cold Call			🔶 🗎
- Customer	* Customer Riverside Investments * Rank [w]Diamond (5 days) Reg. No 783065		* Type Construction VAT No 908753637	
- Salesmen	Addigati Miloa Addis Viewafer Addis Viewafer Addis Viewafer Addis Viewafer Angle Roadbraug Angle Roadbraug Angle Roadbraug Armando Reichelt Ary Houelin	Chris Haynes CO3 Admin Colin Holden Darry Muller Derry Muller Derrick Weeder Edvell Maskva	Judith Middangi Kapila Mathad Kapila Mathad Lucky Manuye Mathad Marc Repolecht Marc Repolecht	
- Contact	* Full name Joel Reeds * Telephone 031 210 455		Email joelreeds@email.com	
- Address	Existing New Address Line 1 12 Selby Court Address Line 2 7 Colinton Rd Suburb Gillite City Durban Province/State KZN Post Code 4000 Country, RSA			
- Case	* Subject Market New Products Information Market New Products			
	Case Type New Customer		Source Type Referral	
- Related Customers	Related Customers 📀 Hope Works; HOP0001 🛱 Hope Works - HOP0001			텞
- Next Activity	 Salesman Judith Mudzengi Type Phone call Subject Market New Products Comments Market New Products 			
- Activity Attendees	Attandees O John Smith; Hope Works I John Smith Page 1 of 1 (1 kems) (1) Send Email Invites * *note that invitations can only be sent to	p attendees with valid email addresses		Page size: 10 💌
- Schedule	When 13 Sep 2019 from 11:00 to 12:0 Reminder Email SMS 30 minutes before sche	00 duled start		
Submit Options	Show customer after save 🕑			
		E Save		

SAVE

- Click on either the
 - 1. Save button or
 - 2. Save icon.



CCM BPO2 Test	Environment			Judith	ı Mudzengi 🍄
📞 Create C	Cold Call				🔶 🗎
- Customer	* Customer Rive * Rank 🔽 Reg. No 789	erside Investments Diamond (5 days) 1065		* Туре Construction VAT No 908733637	
- Salesmen	Abigail Milne Adele Weeder Adele Weeder Alex Spangenberg Almeria Teacy Andromache Joselevitch Angie Roseborough Armando Reichelt Ary Nuelin		Chris Haynes CO3 Admin Colin Holden Dalene Pillay Derryl Muller Debbie Lugar Derrick Weeder Edwelf Msakwa	Judith Hudsengi Kashmira Hirghin Kashmira Hirghin Kasan Jakafund Lucky Haruyae Malory Allbon Marc Repool Maruse Encelbrecht	Â
- Contact	* Full name Joe * Telephone 031	Reeds 210 455		Email joelreeds@email.com	
- Address	Existing Nev Address Line 1 12 ! Address Line 2 7C Suburb Gill City Dur Province/State KZP Poot Code 400 Country R54	w Selby Court Olinton Rd Itta ban V N O A			
- Case	* Subject Mar Information Mar * Value 200	ket New Products ket New Products 1000			
- Related Customers	Case Type Nev Related Customers 😯	v Customer Hope Works; HOP0001 Hope Works - HOP0001		Source Type Referral	
- Next Activity	* Salesman Judi * Type Pho * Subject Mar Comments Mar	ith Mudzengi ne call ket New Products ket New Products			
- Activity Attendees	Attendees 😲 🛓 : Pag Send Email Invites 🗌	John Smith; Hope Works John Smith e 1 of 1 (1 items) ⓒ [1]) an *note that invitations can only be sen	t to attendees with valid email addr	5565	Page size: 10 💌
- Schedule	When 13: Reminder Ema	Sep 2019 from 11:00 to 1 all SMS 30 minutes before so	2:00 cheduled start		
Submit Options	Show customer after save 🕑				
		0-	Save		

- The *Customer Dashboard* will be displayed.
- The newly added customer can be viewed in this screen.



Cold Call

CSU BPO3	? Test Enviro	nment		Judith Mudzengi 🌣
📕 Rive	rside Inve	stments		🔂 Search 🔍
Acti	vities for L	ast 30 Days	Performance	Pipeline
Description	Target Nothing to	Existing New Custmrs Custmrs display	0.00 0.00 0.00 0.00 0 0.2 0.4 0.5 0.8 1	Fetching data
create cold call	C	Rivers warnings	de Investments - RIV0001 Trading Name Riverside Investments Registered Name Riverside Investments Description VAT No 908753637 Registration 789665	75%
customers	cases	contes	Rank Diamond Website http:// Phone 031 210 455	
Quotes	orders	↑ invoices	12 Months Sale	es History
sredit notes	¢¢	Contracts	63 0.25 6.2 0.15 6.1	
service calls	Kan Strid Party	nes.	0.55	2 ³ and ¹² and ¹² and ¹² and ¹²
			©2019 CO3 Technologies (Rty) Ltd (3.5.5.1 / 3.5.5.1)	

CREATE COLD CALL FOR EXISTING CUSTOMER

Customer Section

- Customer:
 - For an existing customer, either click on the *drop-down arrow* and select the relevant customer or



CCM BPO2 Test E	invironment		Judith Mudzengi 🌣
📞 Create C	old Call		🔶 🗃
- Customer	 Customer Prove new customer name or search for existing custome Rank: Select customer's rank Reg. No. Registration number 	* Type The customer type VAT No VAT number	
+ Salesmen			
- Contact	 Full name Contact's full name Telephone Contact's telephone number 	Email Email address	
+ Address			
- Case	* Subject: The subject of the case Information Additional information relating to the case		
	= Value 0 Case Type of Case	Source Type The type of source	
+ Related Customers			
- Next Activity	 Salesman Salesman assigned to this customer Type Type of activity Subject The subject of the activity Comments Additional Information relating to the activity 		
+ Activity Attendees			
- Schedule	When 12 Sep 2019 from 18:00 to 19:00 Reminder Email 🗌 SMS 🗌 30 minutes before scheduled start		
Submit Options	Show customer after save 🕑		
	🖻 Save		

- Customer:
 - 1. type in the Customer Name,
 - a customers list will pop up. As you type, the amount of customers in the list this will reduce. Select the relevant customer.



Customer * Customer * Customer * Customer * Customer * Customer * Rank * Rank * For type + Salesmen * Solesmen * Solesmen * Solesmen * Solesmen * For type * Solesmen	Create Cold	Customer * Rank Reg. No * Full name * Telephone " Subject Information	1 Hop Code 71505978 71505978 71505977 HoP0001 71505888 71502461 71502461 71509711 The subject of th Additional inform	Name Artholipyrenisceae Fissk Cell Kryblipilusty Extended Artholipyrenis Höje Works Kryblipilusty Customize Kryblipilusty Customize Kryblipilusty LDX e Case extension relating to the c	Registered Name Arthopyreniaceae Flash Cell Kyphoplasty Estended Arthopyreniac Hope Worls Kyphoplasty Customia Kyphoplasty IDX	Trading Name Arthopyreniaceae Flash Cell Kyphoplasty Extended Arthopyreniac Hope Works Kyphoplasty Customizat Kyphoplasty Function Kyphoplasty IDX	Status N N N A A N N	her type	← [
- Customer * Customer Hop * Rank Code Name Registered Name Trading Name Data Properties * Rank Code Subserve Code Nynbigility Code Nynbigility Data Properties Code Anthopyreniac Case Flack Anthopyreniac Case Flack Non- Data Properties Data Properties Code Anthopyreniac Case Flack A	- Customer	* Customer * Rank Reg. No * Full name * Tellephone * Subject Information	Hop Code 71505978 71506696 71506966 71505977 HOP0001 71505688 71505688 71505711 The subject of th Additional inform	Name Arthopyrenisceae Flash Cell Kyphopiasty Extended Arthopyrenia Hope Works Kyphopiasty Customiza Kyphopiasty Function Kyphopiasty TDX e case aution relating to the c	Registered Name Arthopyreniaceae Flash Cell Kryhoplasty Extended Arthopyreniac Hope Works Kryhoplasty Customizat Kryhoplasty Function Kryhoplasty IDX	Trading Name Arthopyreniaceae Flash Cell Kyphoplasty Extended Arthopyreniac Hope Works Kyphoplasty Customizal Kyphoplasty Function Kyphoplasty IDX	Status N N N A N N	er er ess)
* Rank Reg. No Solds Name Register Toding Name Statu norr type * Salesmen Image: Signed Sig	+ Salesmen Contact Contact	= Rank Reg. No - Full name - Tellephone - Subject Information	Code 71505978 71506696 71509577 HOP0001 71505688 71502461 71502461 71509711 The subject of th Additional inform	Name Arthopyreniaceae Flash Cell Kyphopiasty Extended Arthopyreniae Hope Works Kyphopiasty Customize Kyphopiasty Function Kyphopiasty Function Kyphopiasty IDX e case aution relating to the c	Registered Name Arthopyreniaceae Flash: Cell Kyphoplasty Extended Arthopyreniac Hope Works Kyphoplasty Customizel Kyphoplasty Function Kyphoplasty IDX	Trading Name Arthopyreniaceae Flash: Cell Kyphoplasty Extended Arthopyreniac Hope Works Kyphoplasty Customizat Kyphoplasty Function Kyphoplasty IDX	Status N N N A A N N	er er ess)
Reg. N0 25:0578 Ardiogramicsee Flack Ardiogramicsee Flack Ardiogramicsee Flack N + Salesmen 75:05577 Extended Ardiogramicsee Flack Ardiogramicsee Flack N - Contlact 75:05577 Extended Ardiogramics Extended Ardiogramics Extended Ardiogramics Extended Ardiogramics Extended Ardiogramics N - Contlact - Full nam 75:05577 Extended Ardiogramics Extended Ardiogramics Extended Ardiogramics N + Address - Full nam 75:05588 Kyphioglary Inaction Kyphoglary Customica Kyphoglary Function N N - Case - Subject of the case Information Additional Information relating to the case Source Type The type of Source - Value 0 Case Type Type of Case Source Type The type of Source + Related Customers - Subject of the activity Source Type The type of Source + Next Activity - Salesman Judith Mudaengi - Type Type of Case Source Type The type of Source + Activity Attendees - Schedule When 12 Sep 2019 from 18:00 to 19:00 Sec Source Type The type of Source - Schedule Show customer after save S - Source structure scheduled start - Source Type The type of Source	+ Salesmen Contact Address Case	Reg. No Full name Telephone Subject Information	71505978 71506966 71509577 H0P0001 71505688 71502461 71509711 The subject of th Additional inform	Arthopyreniaceae Flash Cell Kyphoplasty Extended Arthopyrenia Hope Works Kyphoplasty Customize Kyphoplasty Function Kyphoplasty IDX	Arthopyreniaceae Flash Cell Kyphoplasty Extended Arthopyreniac Hope Works Kyphoplasty Customizat Kyphoplasty Function Kyphoplasty IDX	Arthopyreniaceae Flash: Cell Kyphoplasty Extended Arthopyreniac Hope Works Kyphoplasty Customizal Kyphoplasty Function Kyphoplasty IDX	N N A N	er CSS	
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Salesmen 199977 Extended Attingsprenies Extended Attingsprenies Number Provided Pro	Contact Address Case	" Full name " Telephone " Subject Information	71509577 H0P0001 71505688 71502461 71509711 The subject of th Additional inform	Extended Arthopyrenia Hope Works Kyphoplasty Customiza Kyphoplasty Function Kyphoplasty IDX	Extended Arthopyreniac Hope Works Kyphoplasty Customizał Kyphoplasty Function Kyphoplasty IDX	Extended Arthopyreniac Hope Works Kyphoplasty Customizal Kyphoplasty Function Kyphoplasty IDX	N A N N	ress	
Contact * Full name * For States Key Biolisky States Key Works Key Works Note Address ** Telephone * 55524 Key Biolisky States Kynhoplaky Function N • ess Address ** Subject The subject of the case ** Subject of the case ** Value 0 • case • case ** Value 0 • case • case • value 0 • case • case • value 0 • value 0 <td< td=""><td>Contact Address Case</td><td>* Full name * Telephone * Subject Information</td><td>HOP0001 71505688 71502461 71509711 The subject of th Additional inform</td><td>Hope Works Kyphoplasty Customiza Kyphoplasty Function Kyphoplasty IDX e case nation relating to the c</td><td>Hope Works Kyphoplasty Customizał Kyphoplasty Function Kyphoplasty IDX</td><td>Hope Works Kyphoplasty Customizal Kyphoplasty Function Kyphoplasty IDX</td><td>N A N N</td><td>ress</td><td></td></td<>	Contact Address Case	* Full name * Telephone * Subject Information	HOP0001 71505688 71502461 71509711 The subject of th Additional inform	Hope Works Kyphoplasty Customiza Kyphoplasty Function Kyphoplasty IDX e case nation relating to the c	Hope Works Kyphoplasty Customizał Kyphoplasty Function Kyphoplasty IDX	Hope Works Kyphoplasty Customizal Kyphoplasty Function Kyphoplasty IDX	N A N N	ress	
CONTACK ** Full name * Telephone ** Stability inclus	Address Case	* Full name * Telephone * Subject Information	71505688 71502461 71509711 The subject of th Additional Inform	Kyphoplasty Customiza Kyphoplasty Function Kyphoplasty IDX	Kyphoplasty Customizat Kyphoplasty Function Kyphoplasty IDX	Kyphoplasty Customizal Kyphoplasty Function Kyphoplasty IDX	A N N	Tess	
Image: Control of the state of the stat	- Address	* Telephone * Subject Information	71502461 71509711 The subject of th Additional inform	Kyphoplasty runction Kyphoplasty IDX ee case hation relating to the c	kyphoplasty runction Kyphoplasty IDX	Kyphoplasty IDX	N		
Address Image: Case information additional information relating to the activity Image: I	Address Case	[∞] Subject Information	The subject of th Additional inform	e case nation relating to the c	kyphoplasty IDX	Kyphoplasty IDX	N		
Case * Subject The subject of the case Information Additional Information relating to the case * Value 0 Case * Value 0 Case * Source Type The type of source Related Customers * Subject The subject of the activity Next Activity * Salesman Judith Mudzengi * Type Type of activity * Subject The subject of the activity * Subject The subject of the activity Comments Additional information relating to the activity Activity Attendees * Schedule When 12 Sep 2019 from 18:00 to 19:00 Reminder Email © Shis © 30 minutes before scheduled start Submit Options	Case	* Subject Information	The subject of th Additional inform	e case nation relating to the c	ase				
Information Additional Information relating to the case "Value 0 Case Type Type of Case Related Customers Next Activity "Subject The subject of the activity Comments Additional Information relating to the activity Activity Attendees Schedule Subput Options Show customer after save IP		Information	Additional inform	nation relating to the c	ase				
Related Customers "Value 0 Case Type Type of Case! Source Type The type of source Related Customers **Salesman Judith Mudzengi "Type Type of activity "Subject The subject of the activity Comments Additional information relating to the activity Activity Attendees Schedule Submit Options Show customer after save IP				autor reading to the c					
Related Customers Next Activity "Salesman Judith Mudzengi "Type of activity "Type of activity Subject free subject of the activity Comments: Additional information relating to the activity Comments: Additional information relating to the activity Schedule Vhen 12 Sep 2019 from 18:00 to 19:00 Reminder Email SMSS Submit Options Show customer after save IP		* Value Case Type	0 Type of Case			s	ource Type The t	ype of source	
Next Activity "Salesman Judith Mudzengi "Type Type of activity "Subject of the activity Comments Additional information relating to the activity + Activity Attendees * Schedule * Schedule When 12 Sep 2019 from 18:00 to 19:00 Reminder Email SMS 30 minutes before scheduled start Submit Options Show customer after save Ø	Related Customers								
* Type Type of activity "Subject of the activity Comments Additional Information relating to the activity Activity Attendees Schedule When 12 Sep 2019 from 18:00 to 19:00 Reminder Email: SMS: 30 minutes before scheduled start Submit Options Show customer after save IP	Next Activity	Salesman	Judith Mudzengi						
* Subject The subject of the activity Comments Additional information relating to the activity * Activity Attendees * Schedule * Schedule When 12 Sep 2019 from 18:00 to 19:00 Reminder Email SHIS 30 minutes before scheduled start Submit Options Show customer after save Ø		* Type	Type of activity						
Activity Attendees Schedule Submit Options Show customer after save IM		* Subject	The subject of th	e activity					
Characteristic When 12 Sep 2019 from 18:00 to 19:00 Reminder Email: Submit Options Show customer after save IIII		Comments	Additional inform	nation relating to the a	activity				
Activity Attendees Schedule When 12 Sep 2019 from 18:00 to 19:00 Reminder Email SMSC 30 minutes before scheduled start Submit Options Show customer after save 🗹									
Schedule When 12 Sep 2019 from 18:00 to 19:00 Reminder Email Submit Options Show customer after save 🗹	- Activity Attendees								
Reminder Email SMS 30 minutes before scheduled start Submit Options Show customer after save 🖉	- Schedule	When	12 Sep 2019	from 18:00 to	19:00				
Submit Options Show customer after save 🗹		Reminder	Email 🗌 SMS 🗆	30 minutes before	e scheduled start				
Show cascher are save w	Submit Options	Show customer after save							
	Color States and Association	onon costonici ditei save	<u>ت</u>						
				_					
					🖹 Save				

- *Rank:* This field will auto populated and cannot be edited.
- *Reg No:* This field will auto populated and cannot be edited.
- *Type:* This field will auto populated and cannot be edited.
- **VAT No:** This field will auto populated and cannot be edited.

CCM BPO2 Test I	Environment		Judith Mudzengi 🌣
📞 Create C	cold Call		÷ 🗎
- Customer	 Customer Hope Works Rank. Silver (60 days) Reg. No. Registration number 	▲ Type Retail VAT No VAT number	←
+ Salesmen			
- Contact	 Full name Contact's full name Telephone Contact's telephone number 	Email Email address	
+ Address			
- Case	 Subject The subject of the case Information Additional information relating to the case 		
	■ value 0 Case Type of Case	Source Type The type of source	
+ Related Customers			
- Next Activity	 Salesman Judith Mudzengi Type Type of activity Subject The subject of the activity Comments Additional information relating to the activity 		
+ Activity Attendees			
- Schedule	When 13 Sep 2019 from 11:00 to 12:00 Reminder Email SMS 30 minutes before scheduled start		
Submit Options	Show customer after save 🕑		
	🖺 Save		



Sales Section

- Previously selected salesmen will already be marked. You can unselect a salesman if applicable.
- Mark additional salesmen that will be linked to this customer if required. These marked salesmen will be available for selection if you are raising this cold call to assign to another salesman.

CRM BPO2 Test B	Environment			Judith Mudzengi 🌣
📞 Create C	old Call			🗲 🗎
- Customer	* Customer Hope Work * Rank Silver (60 Reg. No Registratio	is days) n number	* Type Retail VAT No VAT number	
- Salesmen	Abigail Milne Adele Weeder Alex Spangehberg Aneria Teacy Andromache Joselevitch Angle Roseborough Armando Reichelt Ary Huelin	Chris Haynes C03 Admin Dalene Pillay Dalene Pillay Debble Lugar Derrick Weeden Edwall Maskva	Judith Mudzengi Kashmira Nirghin Kressia Maidand Kim Engelbrecht Lucky Maxuye Malory Allibon Marc Repsold Marine Engelbrecht	←
- Contact	* Full name Contact's * Telephone Contact's	ull name velephone number	Email Email address	
+ Address				
- Case	Subject The subject Information Additional	t of the case information relating to the case		
	* Value 0 Case Type Type of Ca	SP.	Source Type The type of source	
+ Related Customers				
- Next Activity	* Salesman Judith Muc * Type Type of ac * Subject The subjec Comments Additional	zengi Livity Ł of the activity information relating to the activity		
+ Activity Attendees				
- Schedule	When 13 Sep 20 Reminder Email 🗌 3	19 from 11:00 to 12:00 SMS 30 minutes before scheduled start		
Submit Options	Show customer after save 🕑			
		🖹 Save		

Contact Section

- *Full Name:* Click on the *drop-down arrow* and select the customer contact.
- **Telephone:** This field will auto populate when the customer contact is selected but can be edited if required.



• *Email Address:* This field will auto populate when the customer contact is selected can be edited if required.

CCM BPO2 Test I	nvironment			Judith Mudzengi 🌣
🌜 Create C	old Call			🗲 🗎
- Customer	* Customer Hope Works * Rank Silver (60 days) Reg. No Registration number		* Type Retail VAT No VAT number	
- Salesmen	Abigail Milne Adele Weeder Adele Angeneberg Anreria Teacy Andromache Joselevitch Angie Roseborough Armando Reichelt Ary Huelin	Chris Haynes CO3 Admin Colin Holden Dalene Pillay Deble Lugar Derrick Waeder Edvell Msakva	Judith Mudzengi Kashmira Nirghin Kesia Maitland Kim Engelbrecht Lucky Manuye Malory Allibon Marc Repaid Marcs Engelbrecht	
- Contact	* Full name: Contact's full name * Telephone: Contact's telephone numb	er	Email Email address	-
+ Address				
- Case	Subject The subject of the case Information Additional information relation	ating to the case		
	* Value 0			
+ Related Customers	Case Type Type of Case		Source Type The type of source	
- Next Activity	 Salesman Judith Mudzengi Type of activity Subject The subject of the activity Comments Additional information relations 	ating to the activity		
+ Activity Attendees				
- Schedule	When 13 Sep 2019 from 1 Reminder Email SMS 30 m	11:00 to 12:00 inutes before scheduled start		
Submit Options	Show customer after save 🕑			
5		🖹 Save		

Address Section

- You can either select an existing customer address or add a new customer address.
- For the purpose of this manual, an existing customer address will be used.
 - *Existing:* Click on the *drop-down arrow* and select an existing customer address.
 - *Address Line 1 and 2:* These fields will auto populate but can be edited if applicable.
 - *Suburb:* This field will auto populate but can be edited if applicable.



- *City:* This field will auto populate but can be edited if applicable.
- *Province / State:* This field will auto populate but can be edited if applicable.
- *Post Code:* This field will auto populate but can be edited if applicable.
- *Country:* This field will auto populate but can be edited if applicable.

CCM BPO2 Test	Environment			Judith Mudzengi 🌣			
📞 Create (Cold Call			🔶 🗎			
- Customer	* Customer Hope Works * Rank, Silver (50 days) Req. No. Registration number		* Type Retail VAT No. VAT number				
- Salesmen	Abigail Milne Adele Weeder Adele Weeder Alax Spangenberg Aneria Teacy Andromache Joseforugh Angle Reachelt Ary Meelin	Chris Haynes CQ3 Admin V Colin Holden Datene Pilay Datene Pilay Debbie Lugar Detrick Weeder Edwall Maskwa	Judith Mudsengi Kashmira Kinghin Kesia Maffand Kin Bingelbrecht Lucky Mawaye Malory Allibon Marc Repoold Marc Repoold	Ŷ			
- Contact	* Full name John Smith * Telephone 031 123 4567		Email john@email.coza				
- Address	Existing Address for the contact Address Line 1 Address Line 1 Address Line 2 Address Line 2 Suburb Suburb City City Province/State Province/State Post Code Contry, Country.						
- Case	 Subject The subject of the case Information Additional information relating 	to the case					
	* Value 0 Case Type Type of Case		Source Type The type of source				
 Related Customers Next Activity 	 Salesman Judith Mudzengi Type of activity Subject The subject of the activity Comments Additional information relating 	to the activity					
+ Activity Attendees							
- Schedule	When 13 Sep 2019 from 11:00 Reminder Email SMS 30 minute	to 12:00 5 before scheduled start					
Submit Options	Show customer after save 🕑						
Save							

Case Section

- *Subject:* Type in the subject of the case.
- *Information:* Type in additional information relating to the case if applicable.
- *Value:* Type in the estimated value of the case.



- *Case Type:* Click on the *drop-down arrow* and select the relevant case type.
- *Source Type:* Click on the *drop-down arrow* and select the relevant source type.

CTM BPO2 Test	Environment			Judith Mudzengi 🌣				
📞 Create C	old Call			🔶 🗎				
- Customer	* Customer Hope Works * Rank Silver (60 days) Reg. No. Registration number		* Type Retail VAT No. VAT number					
- Salesmen	Abigail Mine Adele Weeder Alex Spagnebrg Aimeria Teacy Andromache Joselevitch Angle Rosborough Armando Reichelt Arv Huein	Chris Haynes Cola Admin Cola Holden Delene Pillay Debrie Lugar Debbie Lugar Derrick Weeder Edwall Maskva	Judith Mudzengi Kashmira Ninphin Keshmira Ninphin Kesia Maltand Kim Engelbracht Lucky Marvure Maicry Allibon Marc Repold Marc Repold	×				
- Contact	* Full name John Smith * Telephone 031 123 4567		Email john@email.coza					
- Address	Existing 26 Lavender Road Address Line 1 26 Lavender Road Address Line 2 New Town Suburb Forest Hills City Durban Province/State KZN Post Code 1234 Country South Africa							
- Case	* Subject The subject of the ca Information Additional information	se n relating to the case		←				
+ Dalated Customere	Case Type Type of Case		Source Type The type of source					
Next Activity	 Salesman Judith Mudzengi Type Type of activity Subject The subject of the ac Comments Additional Information 	tivity n relating to the activity						
+ Activity Attendees								
- Schedule	When 13 Sep 2019 from Reminder Email SMS	11:00 to 12:00 30 minutes before scheduled start						
Submit Options	Show customer after save 🕑							
	🖻 Save							

Related Customer Section

- You have the ability to link *Related Customers*. This enables you to invite contacts from various clients to an activity such as a meeting or training session.
- If you don't need to link a *Related Customer*, you can move on to the Activity section.



- Related Customers:
 - 1. Click on the *drop-down arrow* and select the relevant customer from the list and
 - 2. click on the ' + ' button.

CRM BPO2 Test	Environment			Judith Mudzengi 🏟
📞 Create C	Cold Call			🔶 🗎
= Salesmen	Abigail Milne Adele Weeder Alex Spangenberg Almeria Teacy Andromache Joselevitch Angie Roseborough Armando Reichelt Arv Huein	Chris Haynes CO3 Admin Collin Holden Dalene Pillay Darryl Muller Debbie Lugar Derrick Weeder Edwell Maskwa	Judith Mudzengi Kushmira Nirghin Kessia Maidand Licky Marwye Malory Allibon Marc Repool Marc Repool	Î
- Contact	* Full name * Telephone	ihn Smith 31 123 4567	Email john@email.coza	
- Address	Existing Address Line 1 Address Line 2 Suburb City Province/State Post Code Country	6 Lavender Road 5 Lavender Road ew Town orest Hills urban 224 234 234		
- Case	* Subject Information	te Inspection te Inspection		
	* Value Case Type	oocoo	Source Type Cold Call	
- Related Customers	Related Customers) ☑ Related Customers o data to display		
- Next Activity	* Salesman * Type * Subject Comments	udth Mudzengi ype of activity e subject of the activity ditional information relating to the activity		
+ Activity Attendees				
- Schedule	When Reminder	3 Sep 2019 from 11:00 to 12:00 nail SMS 30 minutes before scheduled start		
Submit Options	Show customer after save	2		
		B Save		

- Related Customers:
 - 3. Click on the *Delete* icon if you wish to remove a linked related customer.



CCM BPO2 Test E	Environment				Judith Mudzengi 🌣
📞 Create C	old Call				🔶 🖪
- Customer	* Customer * Rank Reg. No	Hope Works Silver (60 days) Registration number		* Type Retail VAT No. VAT number	
- Salesmen	 Abigail Milne Adele Weeder Alex Spangenberg Almeria Teacy Andromache Joselevitch Angie Roseborough Armando Reichelt Arv Huelin 		Chris Haynes CO3 Admin Colin Holden Dalene Pillay Darryl Muller Debbie Lugar Derrick Weeder Edwell Maskwa	Judith Mudzengi Kashmira Nirghin Kessia Maitland Kim Engelbracht Lucky Maruya Malory Alliban Marc Repsold Marus Engelbracht	
- Contact	* Full name * Telephone	John Smith 031 123 4567		Email john@email.coza	
- Address	Existing Address Line 1 Address Line 2 Suburb City Province/State Post Code Country	26 Lavender Road 26 Lavender Road New Town Forest Hills Durban KZN 1234 South Africa			
- Case	* Subject Information * Value	Site Inspection Site Inspection 100000		Server Ture Cold Coll	
- Related Customers	Related Customers	JIRA Networked: 71505555		Source type Cold Call	3→=
- Next Activity	* Salesman * Type * Subject Comments	Judith Mudzengi Type of activity The subject of the activity Additional information relating to	the activity		
+ Activity Attendees					
- Schedule	When Reminder	13 Sep 2019 from 11:00 Email SMS 30 minutes (to 12:00 before scheduled start		
Submit Options	Show customer after save	v			
			B Save		

Next Activity Section

- *Salesmen:* You will be selected by default. You can assign this Customer, Case and Activity to another salesman, if you are raising this on their behalf.
 - To assign this case to another salesman, click on the
 - *drop-down arrow* and select the relevant salesman.*Note:* You can only assign the case to the
 - salesmen selected in the Salesmen section.
- *Type:* Select the type of Activity, e.g. 'Call'.
- *Subject:* Type in the subject of the activity.



• *Comments:* Type in additional information relating to the activity.

CCM BPO2 Test	Environment				Judith Mudzengi 🄅
📞 Create C	Cold Call				🔶 🗎
- Salesmen	Abigail Milne Adele Weeder Alex Spangenberg Almeria Teacy Andromache Joselevitch Angie Roseborough Armando Reichelt Arv Huelin		Chris Haynes CO3 Admin Colin Holden Dalene Pillay Darryl Muller Debbie Lugar Derrick Weeder Edwell Msakwa	Judith Mudsengi Kashmira Nirghin Kessia Maitand Kim Engelbracht Lucky Manuya Malory Allibon Marc Repaidd Marcs Engelbracht	· · ·
- Contact	* Full name * Telephone	John Smith 031 123 4567		Email john@email.coza	
- Address	Existing Address Line 1 Address Line 2 Suburb City Province/State Post Code Country	26 Lavender Road 26 Lavender Road New Town Foreat Hills Durban K2M 1234 South Africa			
- Case	* Subject Information	Site Inspection Site Inspection			
	* Value Case Type	100000 Corporate		Source Type Cold Call	
- Related Customers	Related Customers	🕂 🖂 Related Customers No data to display			
- Next Activity	* Salesman * Type * Subject Comments	Judith Mudzengi Type of activity The subject of the activity Additional information relating tr	o the activity	←	
+ Activity Attendees					
- Schedule	When Reminder	13 Sep 2019 from 11:00 Email SMS 30 minutes	to 12:00 before scheduled start		
Submit Options	Show customer after save				
			B Save		

Activity Attendees Section

- It is only necessary to link Activity Attendees if you want to send email invites to these people to join an activity - such as a meeting. The attendees can accept or reject this request. If they accept, this activity will display as an event on their calendar.
 - 1. The Salesman and Customer Contact will be linked as Activity Attendees by default (and cannot be removed).
 - You can also link other employees, case customer contacts and related customer contacts. To do so, click on the *dropdown arrow* and select the relevant person from the list.
 - 3. Then click on the ' + ' button.



- 4. Tick the *Send Email Invites* check box if you wish to send email invites to the attendees.
 - *Note:* The *Send Email Invites* option may be selected by default depending on the BPOCRM configuration .

Customer Customer Salesmen Abiga Adele Adee Adeee Adee Adee Adee Adeee Adeee	* Customer Hope Works * Rank Silver (60 days) Reg. No Registration number Il Nilne Weeder Spangenberg Ia Tacy mache Joselevitch Roseborough do Reichelt uelin * Felighone 031 123 4567 Existing 26 Lavender Road Address Line 2 flavender Road Address Line 1 26 Lavender Road Address Line 1 26 Lavender Road	Chris Haynes Co3 Admin Co3 Admin Co3 Holden Darnyl Muller Darnyl Muller Derrick Weeder Edwell Msakwa	= Type VAT No Email 3	Retail VXT number Stathmark Singhin Kashmia Singhin Kassia Maitland Kim Engelbrecht Lucky Mawuye Malory Allibon Marc Repsold Marius Engelbrecht John@email.ccza	
 Salesmen Abiga Abiga Ades Alex 5 Amaro Angro <	II Milne Weeder Spangenberg Ia Teacy Marche Joselevitch Reseberuigh and Reichelt uellin * Full name John Smith * Tellephone 031 123 4567 Existing 26 Lavender Road Address Line 1 26 Lavender Road Address Line 2 New Town Suburb Forest Hills City Durban	Chris Haynes CO3 Admin CO3 Admin Dalene Pillay Dalene Pillay Debie Lugar Debie Lugar Edwell Msakwa	Email 3	Yudith Mudzengi Kashnira Nirghin Kessi Maltand Kim Engelbrecht Lucky Marwye Malory Allibon Marc Repsold Marius Engelbrecht	
- Contact - Address	* Full name John Smith * Telephone 031 123 4567 Existing 26 Lavender Road Address Line 1 26 Lavender Road Address Line 2 New Town Suburb Forest Hills City Durban		Email j	john@email.coza	
- Address	Existing 26 Lavender Road Address Line 1 26 Lavender Road Address Line 2 New Town Suburb Forest Hills City Durban				
	Province/State KZN Post Code 1234 Country South Africa				
- Case	* Subject Site Inspection Information Site Inspection				
	* Value 100000 Case Type Corporate Customer		Source Type	Cold Call	
- Related Customers	elated Customers 📀 Related Customers No data to display				
- Next Activity	* Salesman Judith Mudzengi * Type Site inspection * Subject Site Inspection Comments Site inspection at site 2 3				
- Activity Attendees	Attendees 📀 🗵 conidees	Case contac	ct and salesman are always mad		
- Schedule	end Email Invites 📄 *note that invitations When 13 Sep 2019 from Reminder Email SMS 30 m	can only be sent to attendees with 11:00 to 12:00 ninutes before scheduled start	valid email addresses 🔫	4	
Submit Options Show cu	stomer after save 🕑				

5. Click on the *Delete* icon if you wish to remove an attendee.



CRM BPO2 Test	Environment					Judith Mudzengi 🌣
📞 Create (Cold Call					🔶 🗎
- Customer	* Customer * Rank Reg. No	Hope Works Silver (60 days) Registration number		* Type Retail VAT No VAT n	umber	
- Salesmen	Abigail Milne Adele Weeder Alex Spangenberg Almeria Teacy Andrea Teacy Andrea Roseborough Armando Reichelt Ary Huelin		Chris Haynes CO3 Admin CO3 Admin Dalene Pillay Darryl Muller Derbib Luga Derrick Weeder Edwell Maakwa		Judith Mudzengi Kashmira Nirghin Kessia Maitland Kim Engelbrecht Lucky Mawuye Malory Allibon Marc Repsold Marius Engelbrecht	
- Contact	* Full name * Telephone	John Smith 031 123 4567		Email john@	Demail.coza	
- Address	Existing Address Line 1 Address Line 2 Suburb City Province/State Post Code Country	26 Lavender Road 26 Lavender Road New Town Forest Hills Durban KZN 1234 South Africa				
- Case	* Subject Information * Value	Site Inspection Site Inspection 100000		Source Type Cold (
- Related Customers	Related Customers	Related Customers No data to display		Source type cold t		
- Next Activity	* Salesman * Type * Subject Comments	Judith Mudzengi Site inspection Site Inspection Site inspection at site 2				
- Activity Attendees	Attendees	 Abigail Milne; Abigail Milne 				5>⊡
- Schodulo	Send Email Invites	*note that invitations	can only be sent to attendees with v	ralid email addresses		
Schedule	When Reminder	Email SMS 30 n	11:00 to 12:00 ninutes before scheduled start			
Submit Options	Show customer after save	V				
			E Save			

Schedule Section

- *When:* This field will be auto populated. Click on the *drop-down arrow* and select the relevant date.
- *From:* This field will be auto populated. Use the *up and down arrows* to select the relevant time.
- *To:* This field will be auto populated. Use the *up and down arrows* to select the relevant time.
- *Reminder:* If you wish to send a reminder to your attendees, you can choose whether to send the reminder by *Email* or *SMS*.
 - 1. Tick the *Email* check box if you wish to send the reminder by email.



- 2. Tick the *SMS* check box if you wish to send the reminder by SMS.
- 3. ' *Reminder Time* ': You can also choose when to send the reminder by clicking on the *drop-down arrow* and selecting the appropriate time period.
 - *Note:* Reminders will only work if your mobile number and email address have been configured in *BPO*.

CTM BPO2 Test I	Environment				Judith Mudzengi 🌣
📞 Create C	old Call				🗲 🗎
- Customer	* Customer * Rank Reg. No	Hope Works Silver (60 days) Registration number		* Type Retail VAT No. VAT number	
- Salesmen	Abigail Milne Adele Weeder Alex Spangenberg Almeria Teacy Andromache Joselevitch Angie Roseborough Armando Reichelt Arv Huelin		Chris Haynes CO3 Admin Ø Colin Holden Dalene Pillay Darryl Muller Derbie Lugar Derrick Weeder Edrick Weeder	Judith Mudzengi Kashmira Nirghin Kessia Matland Kim Engelbrecht Lucky Marvys Malory Allibon Marc Repaold Marius Engelbrecht	
- Contact	* Full name * Telephone	John Smith 031 123 4567		Email john@email.coza	
- Address	Existing Address Line 1 Address Line 2 Suburb City Province/State Post Cotate Country	26 Lavender Road 26 Lavender Road New Town Forest Hills Durban KZN 1234 South Africa			
- Case	* Subject Information	Site Inspection Site Inspection			
	Case Type	Corporate Customer		Source Type Cold Call	
- Related Customers	Related Customers	 Related Customers No data to display 			
- Next Activity	* Salesman * Type * Subject Comments	Judith Mudzengi Site inspection Site Inspection Site inspection at site 2			
- Activity Attendees	Attendees Send Email Invites	Attendees *note that invitations	Case contact s can only be sent to attendees with v	and salesman are always made attendees alid email addresses	
- Schedule	When Reminder	13 Sep 2019 from Email SMS . 230	11:00 to 12:00 minute before scheduled start		
Submit Options	Show customer after save				
		00	3 Bave		

Submit Option Section

• *Show customer after save:* This will be selected by default. Unselect if you do not wish to see the customer after saving.



CRM BPO2 Test	Environment				Judith Mudzengi 🌣
📞 Create C	cold Call				← 🗎
- Customer	* Customer * Rank Reg. No	Hope Works Silver (60 days) Registration number		* Type Retail VAT No VAT number	
- Salesmen	Abigail Milne Adele Weeder Alex Spangenberg Almeria Teacy Andromache Joselevitch Angie Roseborough Armando Reichelt Arv Huelin		Chris Haynes CO3 Admin CO3 Admin Dalene Pillay Darnyl Muller Derrick Weeder Edwall Maskva	Judith Mudzengi Kashmira Nirghin Kessi Maitland Krin Engelbrecht Locky Navuye Halory Allibon Marc Repool	ĺ
- Contact	* Full name * Telephone	John Smith 031 123 4567		Email john@email.coza	
- Address	Existing Address Line 1 Address Line 2 Suburb City Province/State Post Code Country	26 Lavender Road 26 Lavender Road New Town Forest Hills Durban KZN 1234 South Africa			
- Case	* Subject Information * Value	Site Inspection Site Inspection 100000			
- Related Customers	Case Type Related Customers	Corporate Customer		Source Type Cold Call	
- Next Activity	* Salesman * Type * Subject Comments	No data to display Judith Mudzengi Site inspection Site Inspection Site inspection at site 2			
- Activity Attendees	Attendees	• Attendees	Case contact and	salesman are always made attendees	
- Schedule	Send Email Invites When Reminder	□ -note that invitations 16 Sep 2019 from Email ♥ SMS □ 15 m	can only be sent to attendees with valid 11:00 to 12:00 inutes before scheduled start	email addresses	
Submit Options	Show customer after save	☑ ←			
			🖹 Save		

Save

- Click on either the
 - 1. Save button or
 - 2. Save icon.



CCM BPO2 Test E	Environment				Judith Mudzengi 🌣
📞 Create C	old Call				🔶 🖨
- Customer	* Customer * Rank Reg. No	Hope Works Silver (60 days) Registration number		* Type Retail VAT No VAT number	2
- Salesmen	Abigail Milne Adele Weeder Alex Spangenberg Almeria Teacy Andromache Joselevitch Angie Roseborough Armando Reichelt Arv Huelin		Chris Haynes CO3 Admin Colin Holden Dalene Pillay Derryl Muller Debbie Lugar Derrick Weaden Edwell Msakwa	 Judith Mudzengi Kashmira Nirghin Kesia Matland Kim Engelbracht Lucky Marcuye Malory Allbon Marc Rapsold Marius Engelbracht 	•
- Contact	* Full name * Telephone	John Smith 031 123 4567		Email john@email.coza	
- Address	Existing Address Line 1 Address Line 2 Suburb City Province/State Post Code Country	26 Lavender Road 26 Lavender Road New Town Forest Hills Durban KZN 1234 South Africa			
- Case	* Subject Information * Value	Site Inspection Site Inspection 100000			
- Related Customers	Case Type Related Customers	Related Customers No data to display		Source type Cold Call	
- Next Activity	* Salesman * Type * Subject Comments	Judith Mudzengi Site inspection Site Inspection Site inspection at site 2			
- Activity Attendees	Attendees Send Email Invites	Attendees *note that invitations ca	Case contact and	salesman are always made attendees email addresses	
- Schedule	When Reminder	16 Sep 2019 from 11 Email SMS 15 min	:00 to 12:00 utes before scheduled start		
Submit Options	Show customer after save	V			
		0-	► 🖹 Save		

- The *Customer Dashboard* will be displayed.
- The newly added customer can be viewed in this screen.



Cold Call

CSU BPO2	2 Test Enviro	nment								Ju	udith Mudzengi 🌣
💾 Нор	e Works								🕀 Sea	rch	Q
Ac	tivities for	Last 30 Days		43000	Perform	ance				Pipeline	
Description		Existing Custmrs	New Custmrs	1,00							
				0.40							
			Hope Work	s - HOP0001				10			
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create cold call		warnings	2		Descript VAT	tion F No					
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quotes	orders	invoices			0.4						
5		0			0.3						
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credit notes	equipment	contracts			0.1						
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