

# 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 already 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 cannot be more than **1** open Activity at a time, per Case.

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**Access:** Webpage - [http://\[servername\]:\[portno\]/BPOCRM/User.aspx](http://[servername]:[portno]/BPOCRM/User.aspx)

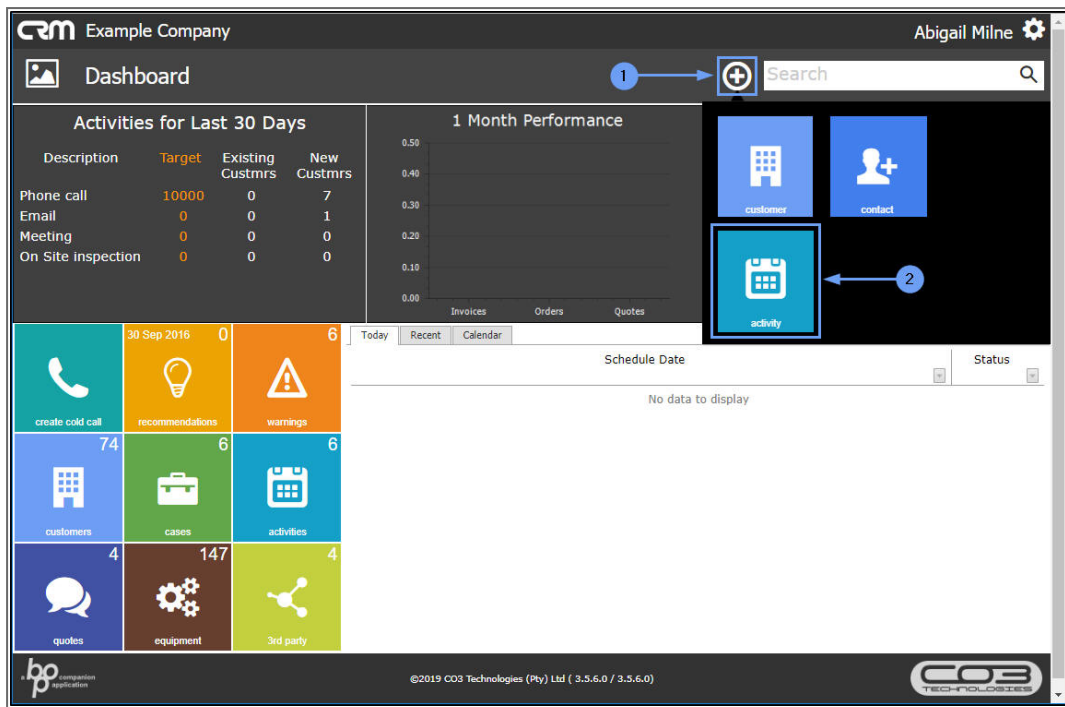
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## CREATE NEW ACTIVITY

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In the CRM *Homepage*,

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

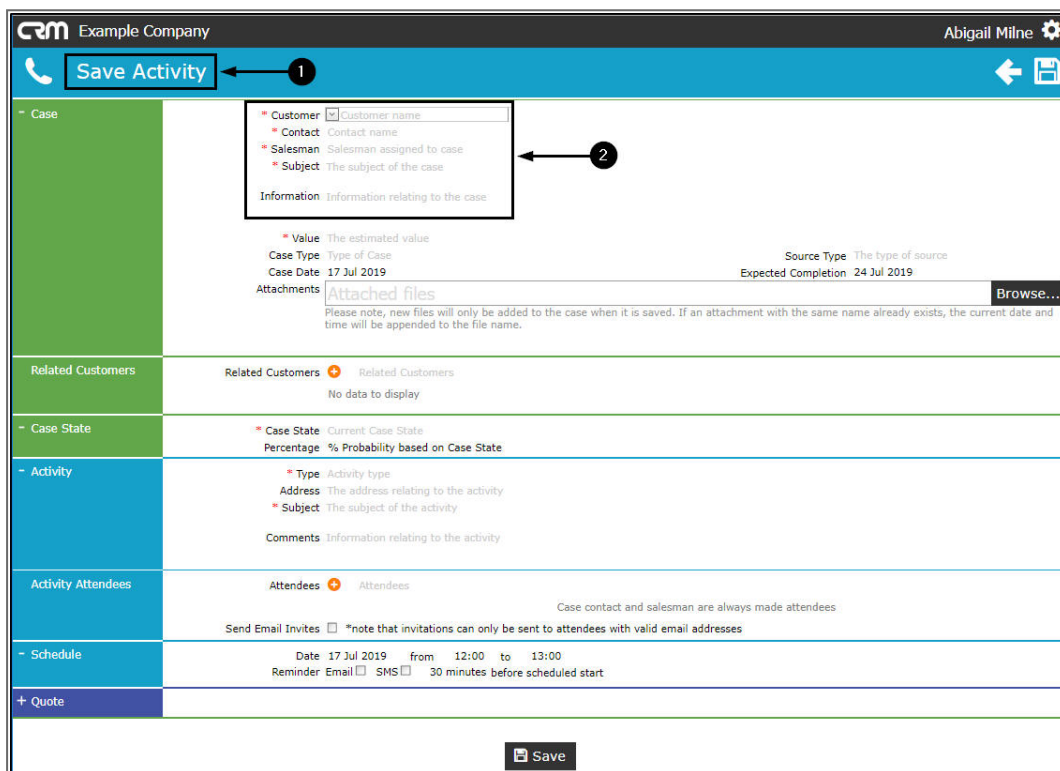


1. The **Save Activity** screen will be displayed.

## 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.



CRM Example Company Abigail Milne

**Save Activity**

**Case**

- \* Customer  Customer name
- \* Contact  Contact name
- \* Salesman  Salesman assigned to case
- \* Subject  The subject of the case
- Information  Information relating to the case
- \* Value  The estimated value
- Case Type  Type of Case
- Case Date  17 Jul 2019
- Source Type  The type of source
- Expected Completion  24 Jul 2019
- Attachments  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 current date and time will be appended to the file name.

**Related Customers**

Related Customers  Related Customers

No data to display

**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 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**

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

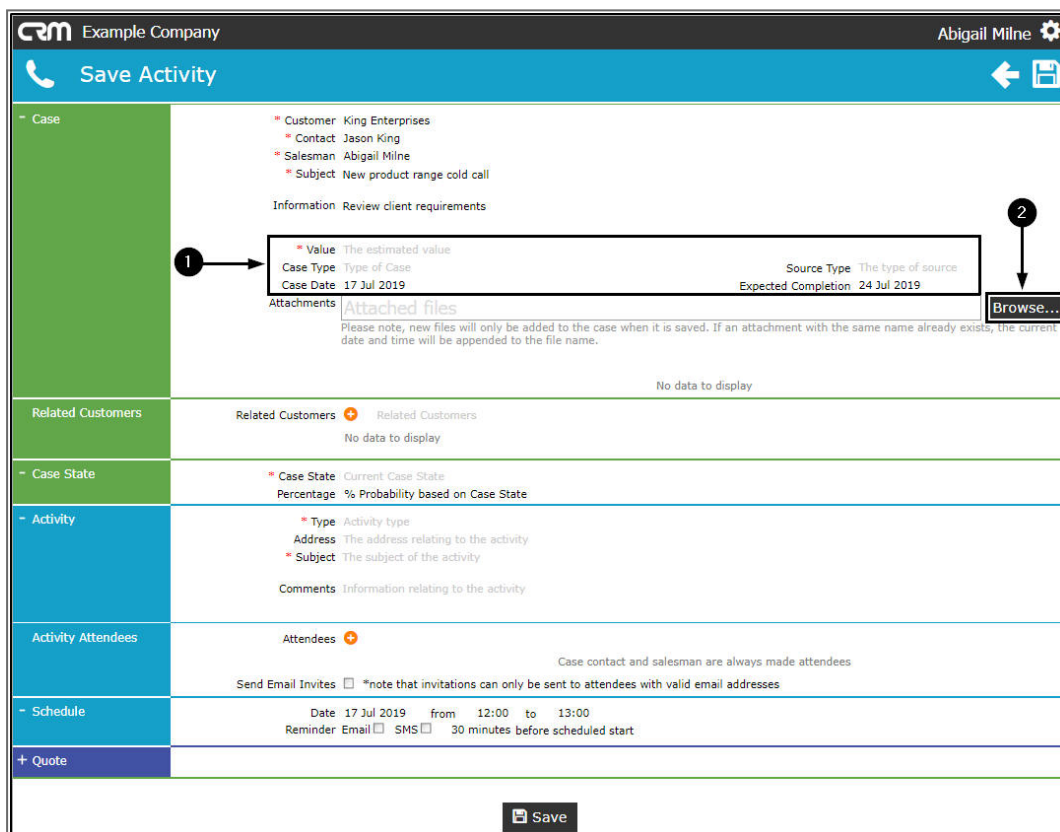
**Source Type:** Click in this field to display a list of all the source types set up on the system (e.g. Referral, Google Ads - how you heard about this customer). Select the applicable source type.

**Expected Completion:** This will auto populate with the date 7 days after 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.



CRM 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** The estimated value

Case Type: Type of Case Source Type: The type of source

Case Date: 17 Jul 2019 Expected Completion: 24 Jul 2019

**Attachments** 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 current date and time will be appended to the file name.

Browse...

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**

- 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 +

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**

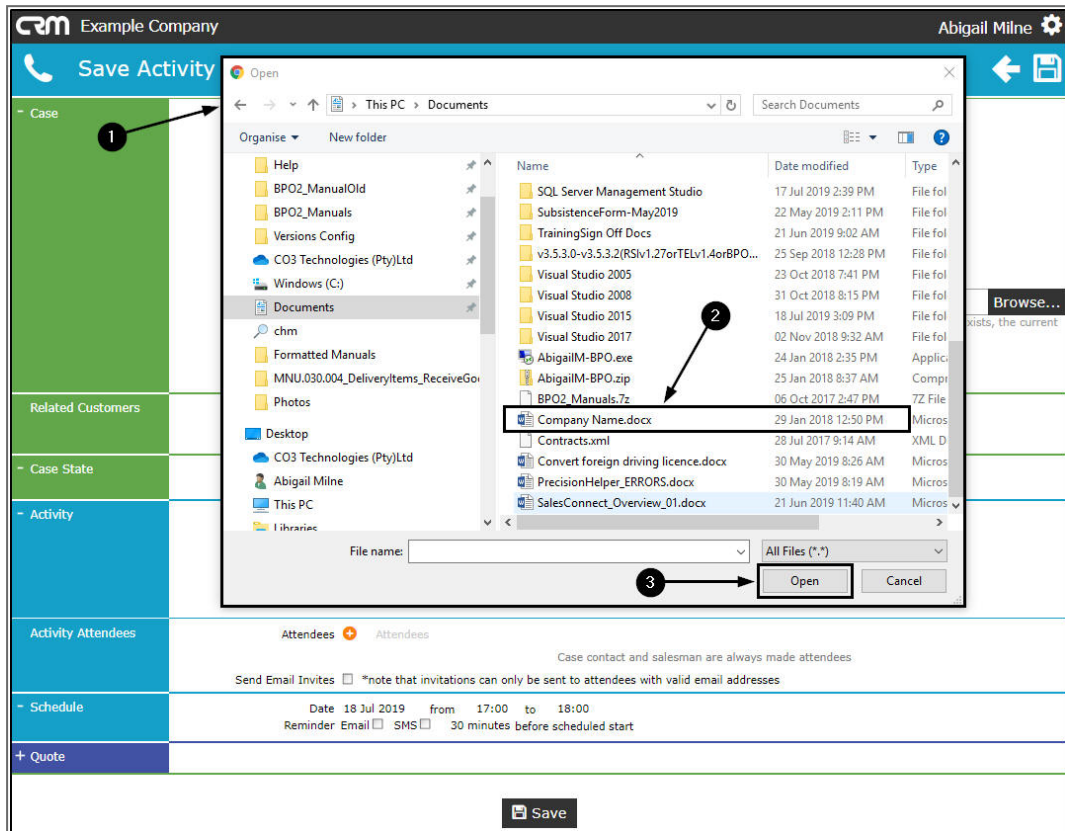
Date: 17 Jul 2019 from: 12:00 to: 13:00

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.

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

CRM

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

Type of Case

Case Date

18 Jul 2019

Source Type

Cold Call

Expected Completion

25 Jul 2019

Attachments

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 current date and time will be appended to the file name.

Company Name.docx

Browse...

Related Customers

Related Customers

No data to display

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

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

18 Jul 2019

from

17:00

to

18:00

Reminder Email

☐

SMS

☐

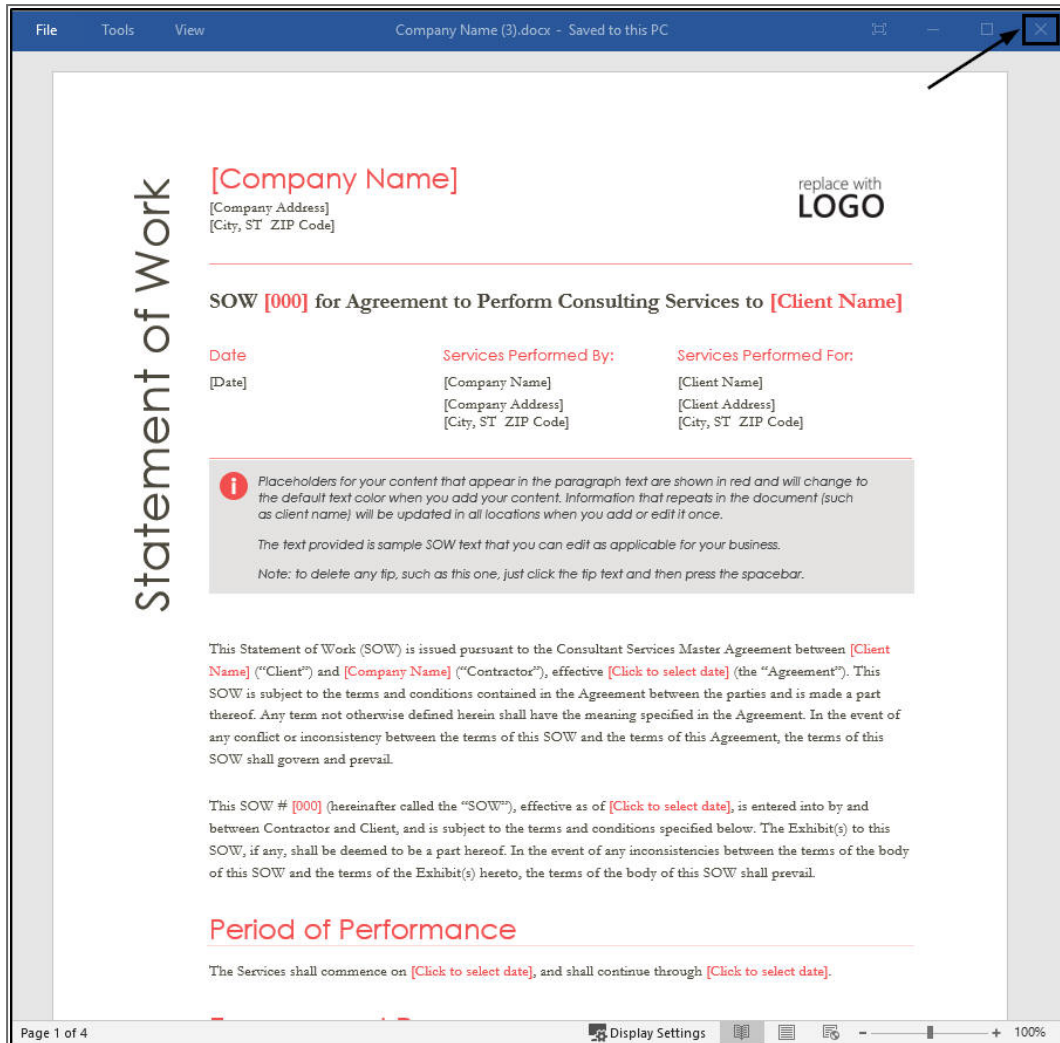
30 minutes before scheduled start

Save

Company Name (...).docx

Show all

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



File Tools View Company Name (3).docx - Saved to this PC

Statement of Work

[Company Name]  
[Company Address]  
[City, ST ZIP Code]

replace with  
LOGO

SOW [000] for Agreement to Perform Consulting Services to [Client Name]

Date	Services Performed By:	Services Performed For:
[Date]	[Company Name] [Company Address] [City, ST ZIP Code]	[Client Name] [Client Address] [City, ST ZIP Code]

**Tip:** Placeholders for your content that appear in the paragraph text are shown in red and will change to the default text color when you add your content. Information that repeats in the document (such as client name) will be updated in all locations when you add or edit it once.

The text provided is sample SOW text that you can edit as applicable for your business.

Note: to delete any tip, such as this one, just click the tip text and then press the spacebar.

This Statement of Work (SOW) is issued pursuant to the Consultant Services Master Agreement between [Client Name] ("Client") and [Company Name] ("Contractor"), effective [Click to select date] (the "Agreement"). This SOW is subject to the terms and conditions contained in the Agreement between the parties and is made a part thereof. Any term not otherwise defined herein shall have the meaning specified in the Agreement. In the event of any conflict or inconsistency between the terms of this SOW and the terms of this Agreement, the terms of this SOW shall govern and prevail.

This SOW # [000] (hereinafter called the "SOW"), effective as of [Click to select date], is entered into by and between Contractor and Client, and is subject to the terms and conditions specified below. The Exhibit(s) to this SOW, if any, shall be deemed to be a part hereof. In the event of any inconsistencies between the terms of the body of this SOW and the terms of the Exhibit(s) hereto, the terms of the body of this SOW shall prevail.

**Period of Performance**

The Services shall commence on [Click to select date], and shall continue through [Click to select date].

Page 1 of 4 Display Settings 100%

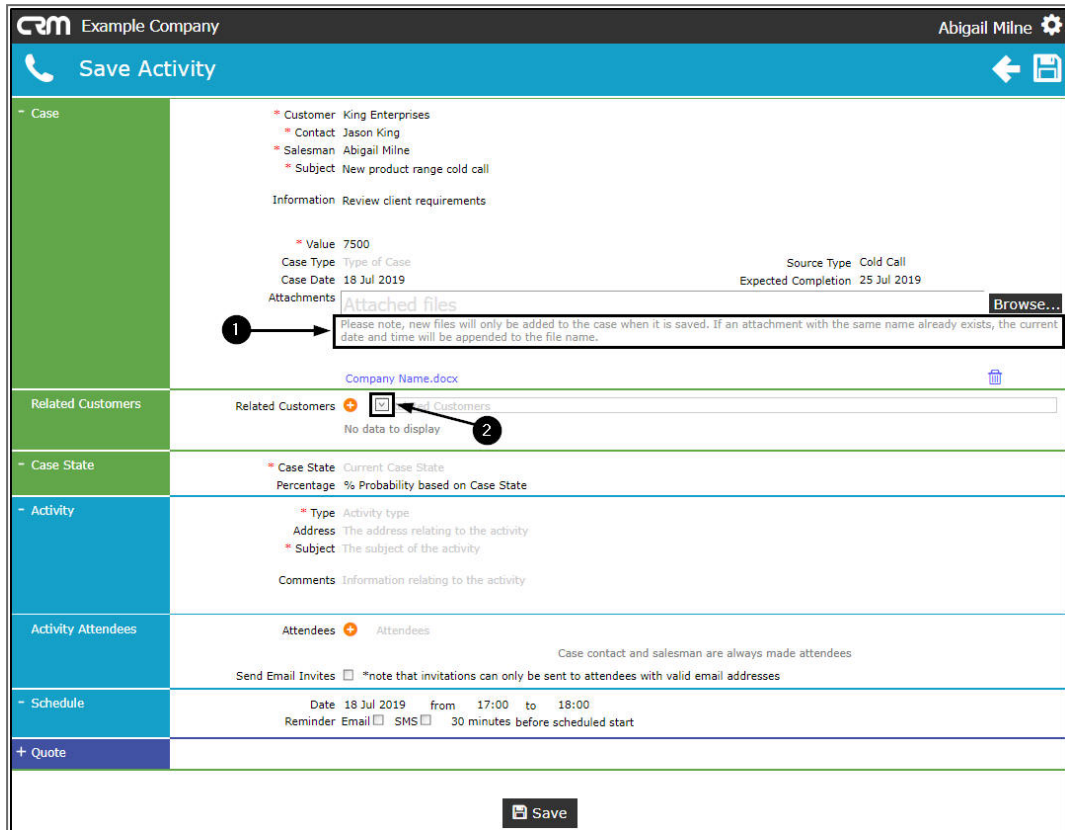
1. An Attachments information message informs you;
  - ***Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.***

## 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.



**CRM 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: Type of Case
- Case Date: 18 Jul 2019
- Source Type: Cold Call
- Expected Completion: 25 Jul 2019

**Attachments** Attached files **Browse...**

1 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  **Related Customers**

No data to display

2


**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 sent to attendees with valid email addresses

**Schedule**


Date: 18 Jul 2019 from 17:00 to 18:00


Reminder 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.


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 Machine Sale

Value: 7500
Case Type: Type of Case
Case Date: 17 Jul 2019
Source Type: Cold Call
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.

Related Customers

Related Customers

Name
Code

Hack PC - IT Shop
HAC001

Healing Hands
HEA0001

Hope Works
HOP001

IT Supplies
ITS0001

Joes Carpentry Shop
JOE0001

Judes Jewels
JUD0001

Just In Time
JUS001

Case State

Case State: Cui
Percentage: % P

Activity

Type: Acti
Address: Thi
Subject: Thi

Comments: Information relating to the activity

Activity Attendees

Attendees

Case contact and salesman are always made attendees

Schedule

Date: 17 Jul 2019
from: 13:00
to: 14:00

Reminder: Email
SMS
30 minutes before scheduled start

Quote

Save

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

CRM

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 Machine Sale

Value

7500

Case Type

Type of Case

Case Date

17 Jul 2019

Source Type

Cold Call

Expected Completion

24 Jul 2019

Attachments

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 current date and time will be appended to the file name.

Browse...

Related Customers

Related Customers

🗑

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 sent to attendees with valid email addresses

Schedule

Date

17 Jul 2019

from

13:00

to

14:00

Reminder Email

☐

SMS

☐

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 delete 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.


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
Case Date: 17 Jul 2019
Source Type: Cold Call
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.

Related Customers

Related Customers
+

Hope 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 sent to attendees with valid email addresses

Schedule

Date: 17 Jul 2019
from: 16:00
to: 17:00

Reminder: Email
☐
SMS
☐
30 minutes before scheduled start

+ Quote

Save

1. The list of **customers** will be displayed.
2. Select the additional related customer.

CRM

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

Case Date: 17 Jul 2019

Source Type: Cold Call

Expected Completion: 24 Jul 2019

Attachments

Attached files

Browse...

Related Customers

Related Customers

test

TES0001

The Very Interesting Shop of Goodies

THE0001

Tinas Coffee Shop

TIN001

Titan Group

TTA001

Westwood Dynamic

WES001

Young Designs

YOU0001

Young Electric

YES001

Case State

Case State

Current

Percentage

Activity

Type: Activity

Address: The

Subject: The

Comments: Information relating to the activity

Activity Attendees

Attendees

Case contact and salesman are always made attendees

Schedule

Date: 17 Jul 2019

from: 16:00 to: 17:00

Reminder: Email SMS 30 minutes before scheduled start

Quote

Save

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

CRM 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

Case Date: 17 Jul 2019

Source Type: Cold Call

Expected Completion: 24 Jul 2019

Attachments

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 current date and time will be appended to the file name.

Browse...

Related Customers

Related Customers

Titan Group: TIA001

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

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 16:00 to 17:00

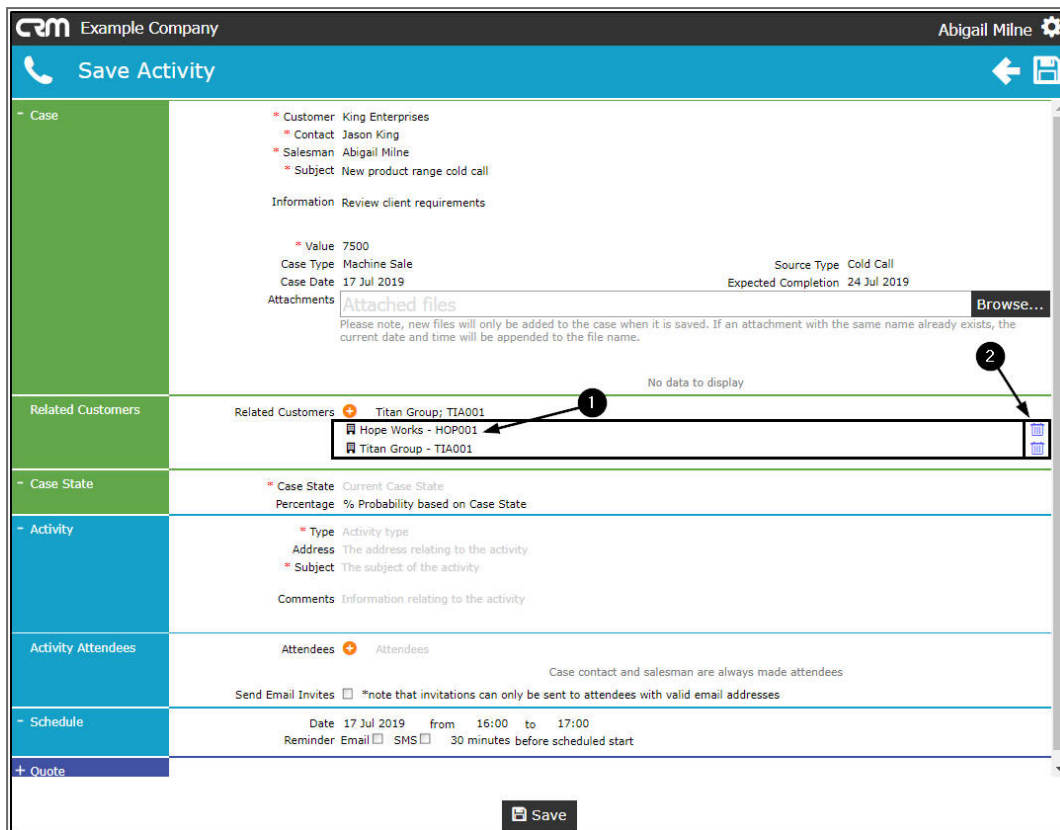
Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

Quote

Save

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

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



**CRM 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

Case Date: 17 Jul 2019

Source Type: Cold Call

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.

**Related Customers**

Related Customers: Titan Group - TIA001

Hope Works - HOP001

Titan Group - TIA001

**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 sent to attendees with valid email addresses

**Schedule**

Date: 17 Jul 2019 from: 16:00 to: 17:00

Reminder: Email ☐ SMS ☐ 30 minutes before scheduled start

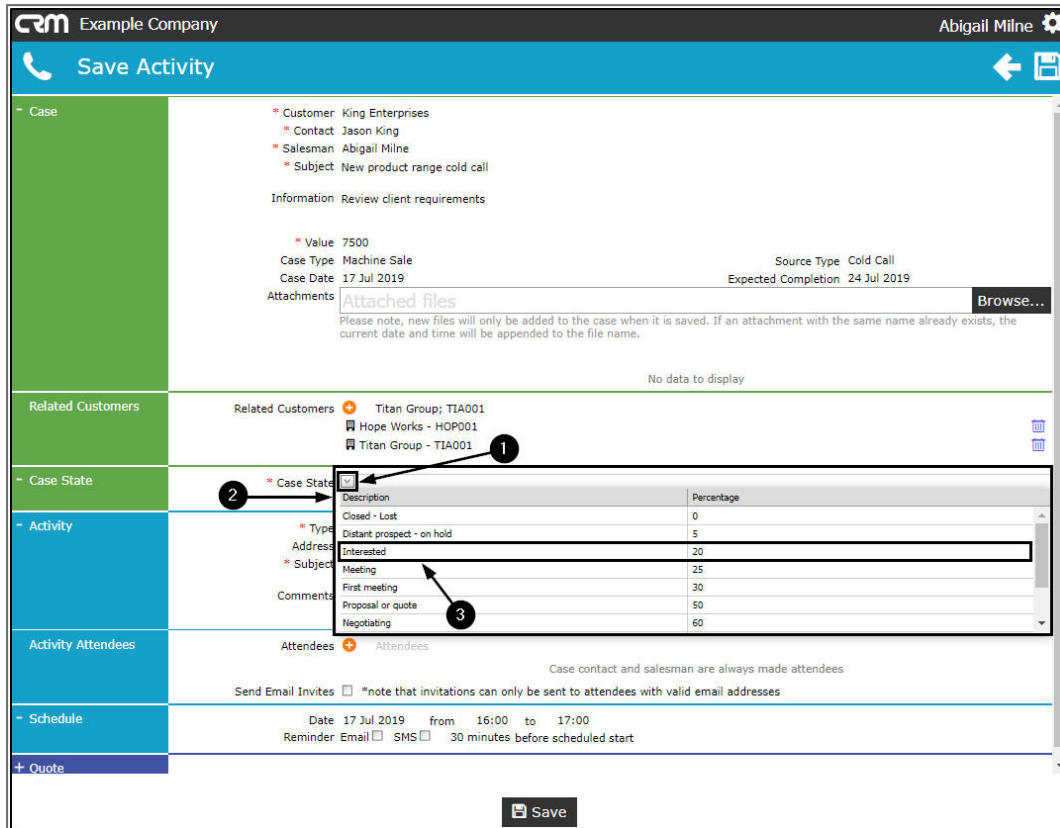
**+ Quote**

**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 [Stage Gates](#) enabled, you can select whether to update the Stage Gates settings after saving the Case.
  - **Note 2:** If this Case Type has [Stage Gates](#) 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.



**CRM 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...](#)

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: **Case State**

Description	Percentage
Closed - Lost	0
Distant prospect - on hold	5
Interested	20
Meeting	25
First meeting	30
Proposal or quote	50
Negotiating	60

**Activity**

- \* Type: **Activity Type**
- \* Address: **Address**
- \* Subject: **Subject**
- \* Comments: **Comments**

**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: 17 Jul 2019 from 16:00 to 17:00

Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

**+ Quote**


**Save**


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).




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
Case Date: 17 Jul 2019
Source Type: The type of source
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.

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: Email
Subject: Meeting
Comments: On Site inspection

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: 18 Jul 2019
from: 11:00
to: 12:00
Reminder: Email
☐
SMS
☐
30 minutes before scheduled start




Quote

Save

1. 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.


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
Case Date 17 Jul 2019
Source Type The type of source
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.

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
Subject
Comments

1 Richmond Street Richmond Town Richmond City
2 Upton Road Upton Town Upton City
1 New Street New Town New City
1 Downton Street Downton Town Downton City
10 Main Road Main Town Main City KZN
10 Main Road Main Town Main City KZN

Activity Attendees

Attendees
Case contact and salesman are always made attendees


Schedule


Date 18 Jul 2019 from 11:00 to 12:00
Reminder Email SMS 30 minutes before scheduled start




Quote

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).


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
Case Date 17 Jul 2019

Source Type The type of source
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.

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 The subject of the activity

Comments Information relating to the activity

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

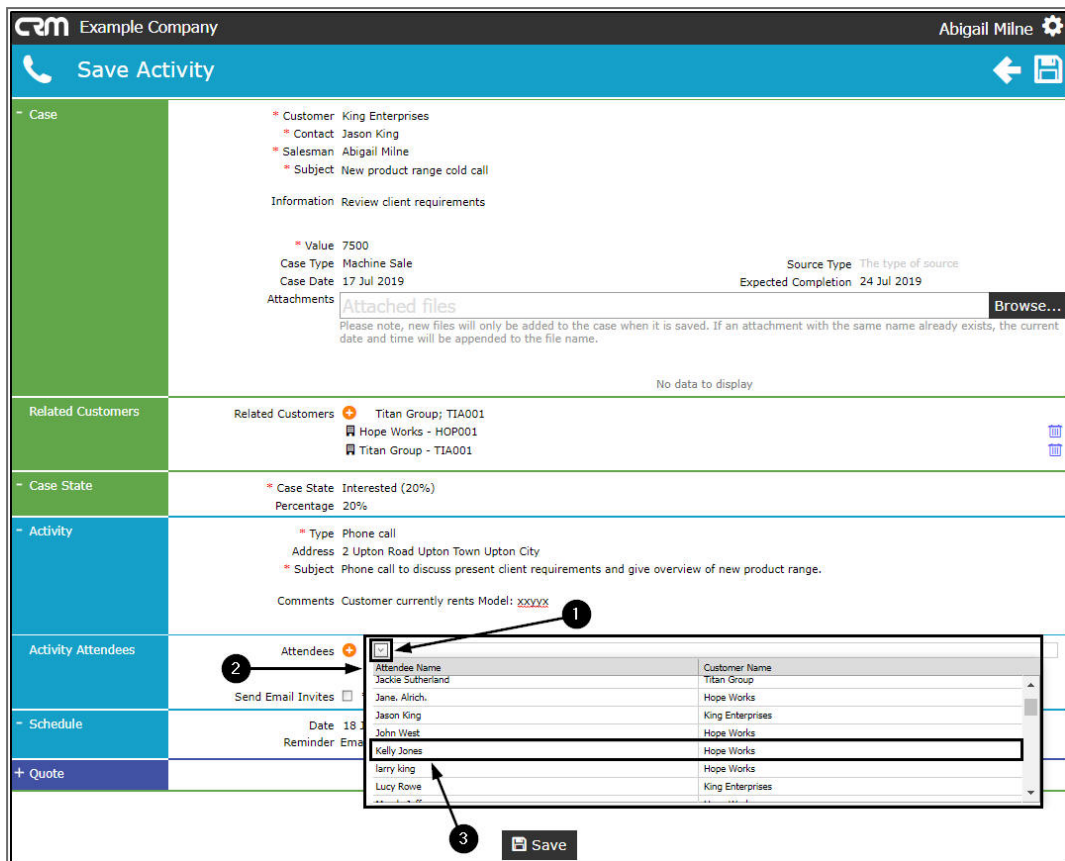
Date 18 Jul 2019
from 11:00 to 12:00
Reminder Email
☐
SMS
☐
30 minutes before scheduled start

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 the **Customer Name** that each is linked to, will be displayed.
3. Select the **Attendee** that you wish to add to this Activity.



The screenshot shows the 'Save Activity' form in a CRM system. The form is divided into several sections: Case, Related Customers, Case State, Activity, Activity Attendees, Schedule, and Quote. The 'Activity Attendees' section is highlighted with a blue background. A dropdown menu is open, showing a list of attendees with their names and customer names. The dropdown is triggered by a plus sign button (labeled 2). The selected attendee, Jackie Sutherland, is highlighted in the dropdown (labeled 1). The 'Save' button is at the bottom right (labeled 3).

**Case Information:**

- \* 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
- Case Date: 17 Jul 2019
- Source Type: The type of source
- Expected Completion: 24 Jul 2019

**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.
- Comments: Customer currently rents Model: xxxxxx

**Activity Attendees:**

Attendee Name	Customer Name
Jackie Sutherland	Titan Group
Jane, Alrich	Hope Works
Jason King	King Enterprises
John West	Hope Works
Kelly Jones	Hope Works
Larry King	Hope Works
Lucy Rowe	King Enterprises

**Schedule:**

- Date: 18 Jul 2019
- Reminder Email: [ ]

**Quote:**

[ ]

**Save**

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

CRM

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

Case Date

17 Jul 2019

Source Type

The type of source

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.

Comments

Customer currently rents Model: xyxxx

Activity Attendees

Attendees

Kelly Jones

Send Email Invites

☐

\*note that invitations can only be sent to attendees with valid email addresses

Schedule

Date

18 Jul 2019

from

11:00

to

12:00

Reminder Email

☐

SMS

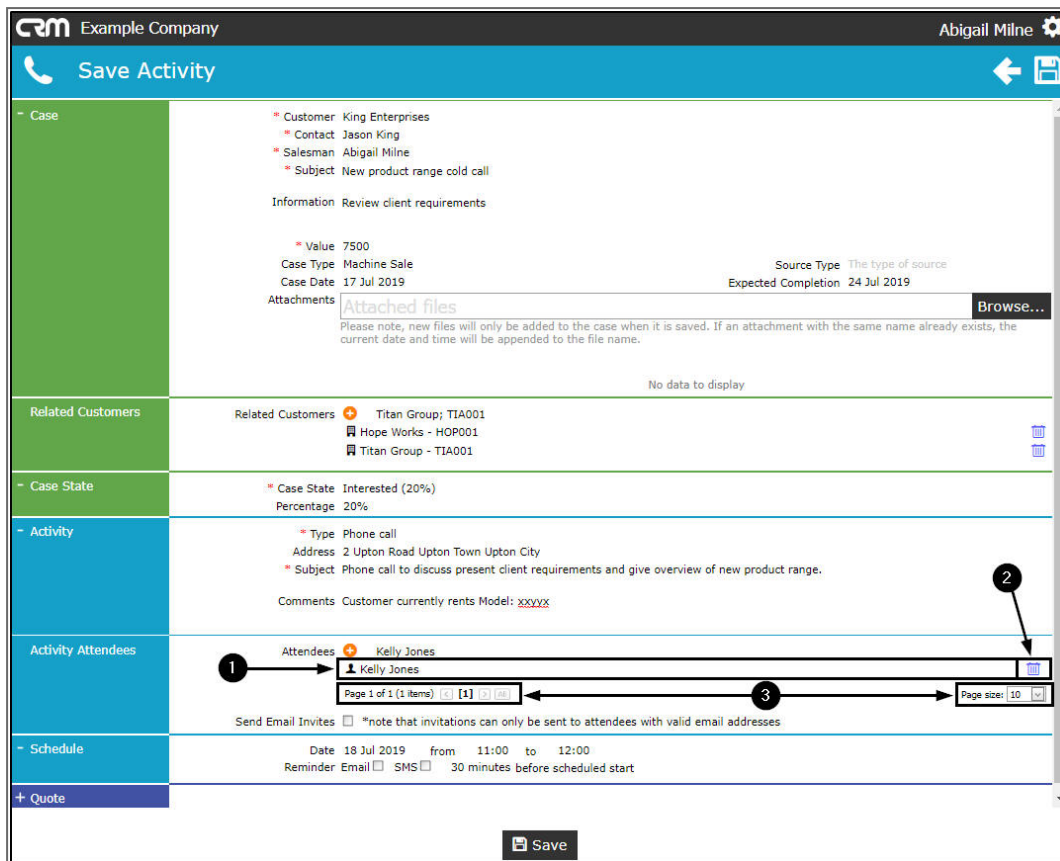
☐

30 minutes before scheduled start

Quote

Save

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



**CRM 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

Case Date: 17 Jul 2019

Source Type: The type of source

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.

Comments: Customer currently rents Model: xxxxx

**Activity Attendees**

Attendees: Kelly Jones

Kelly Jones

Page 1 of 1 (1 items) [1] [2] [All]

Page size: 10

Send Email Invites ☐ \*note that invitations can only be sent to attendees with valid email addresses

**Schedule**

Date: 18 Jul 2019 from: 11:00 to: 12:00

Reminder 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.

CRM 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

Case Date 17 Jul 2019

Source Type The type of source

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.

Comments Customer currently rents Model: xxxxxx

Activity Attendees

Attendees

Send Email Invites

Date 18 Jul 2019

Reminder Email

Attendee Name	Customer Name
Colly Jones	Hope Works
Accounts Contact	Hope Works
Duncan McCredie	Hope Works
Jackie Samuels	Hope Works
Jackie Sutherland	Titan Group
Jane, Alrich	Hope Works
Jason King	King Enterprises
John West	Hope Works

Schedule

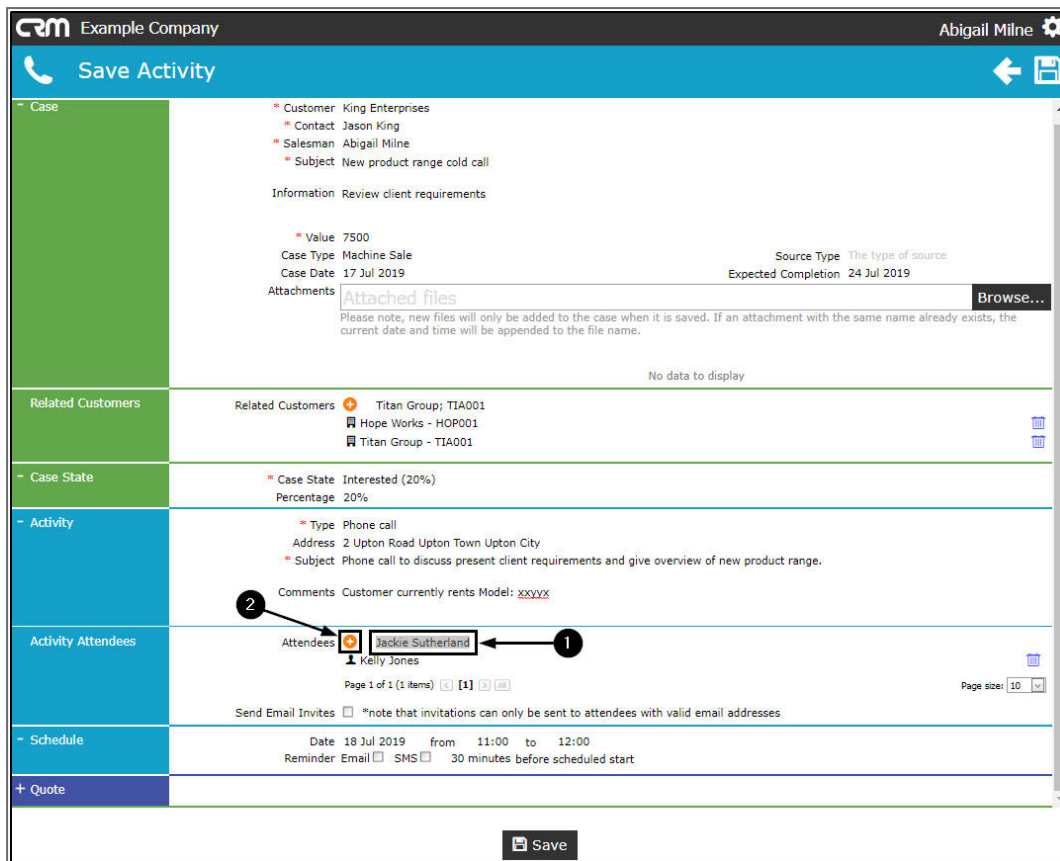
Date 18 Jul 2019

Reminder Email

Quote

Save

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



**CRM 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
- Case Date: 17 Jul 2019
- Source Type: The type of source
- 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.
- Comments: Customer currently rents Model: xxxxx

**Activity Attendees**

Attendees: Jackie Sutherland (1) Kelly Jones

Page 1 of 1 (1 items) [1] [2] [3]

Send Email Invites ☐ \*note that invitations can only be sent to attendees with valid email addresses

**Schedule**

Date: 18 Jul 2019 from 11:00 to 12:00

Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

**Quote**

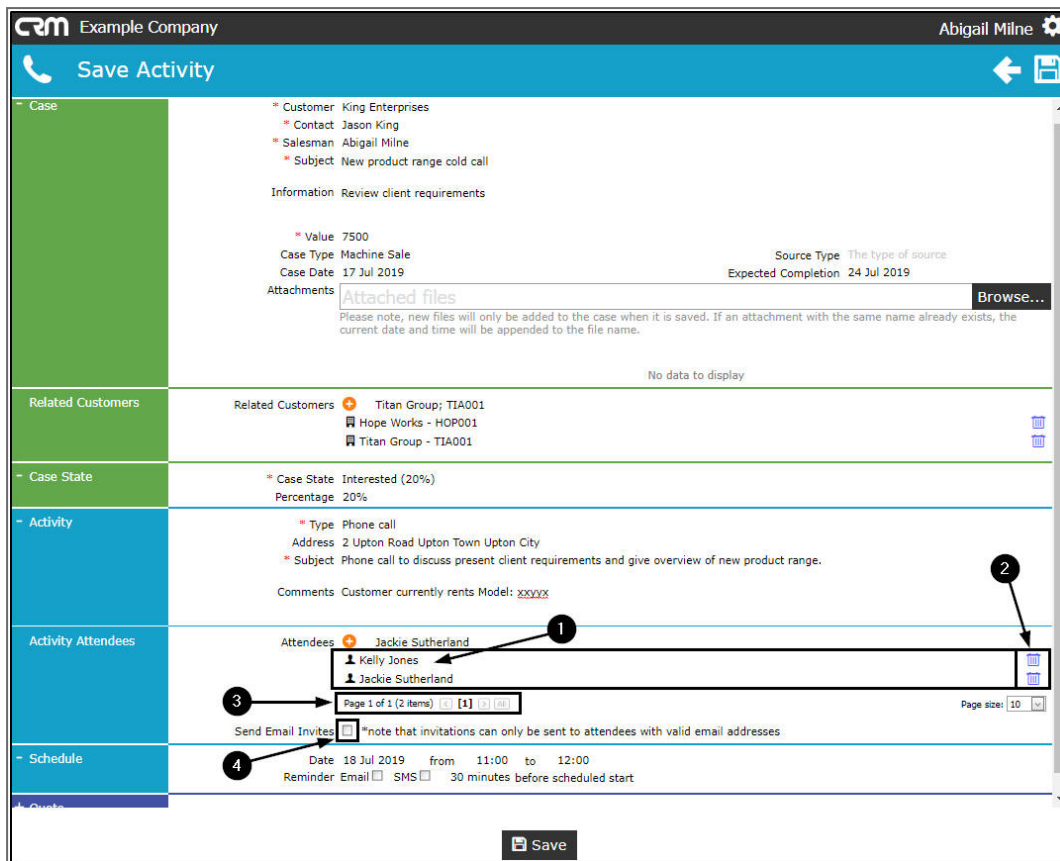
**Save**

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

You can continue to add attendees in this way until you have all 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 valid email address set up to receive an email invitation.





**CRM 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 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.

Comments Customer currently rents Model: xxxxxx

**Activity Attendees**

Attendees + Jackie Sutherland

Kelly Jones  
Jackie Sutherland

Page 1 of 1 (2 items) [1] [2] [3] [4] [5] [6] [7] [8] [9] [10]

Page size: 10

Send Email Invites ☐ \*note that invitations can only be sent to attendees with valid email addresses

**Schedule**

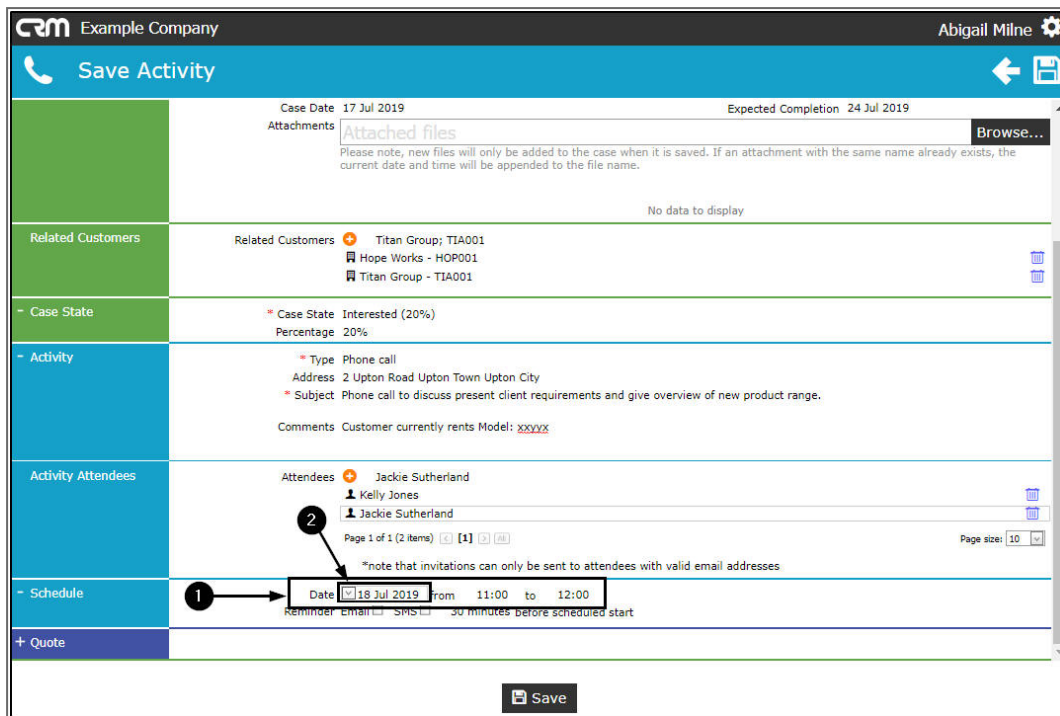
Date 18 Jul 2019 from 11:00 to 12:00

Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

[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.



CRM Example Company Abigail Milne

**Save Activity**

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: Titan Group - TIA001, Hope Works - HOP001, Titan Group - TIA001

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: xxxxx

Activity Attendees: Jackie Sutherland, Kelly Jones, Jackie Sutherland

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

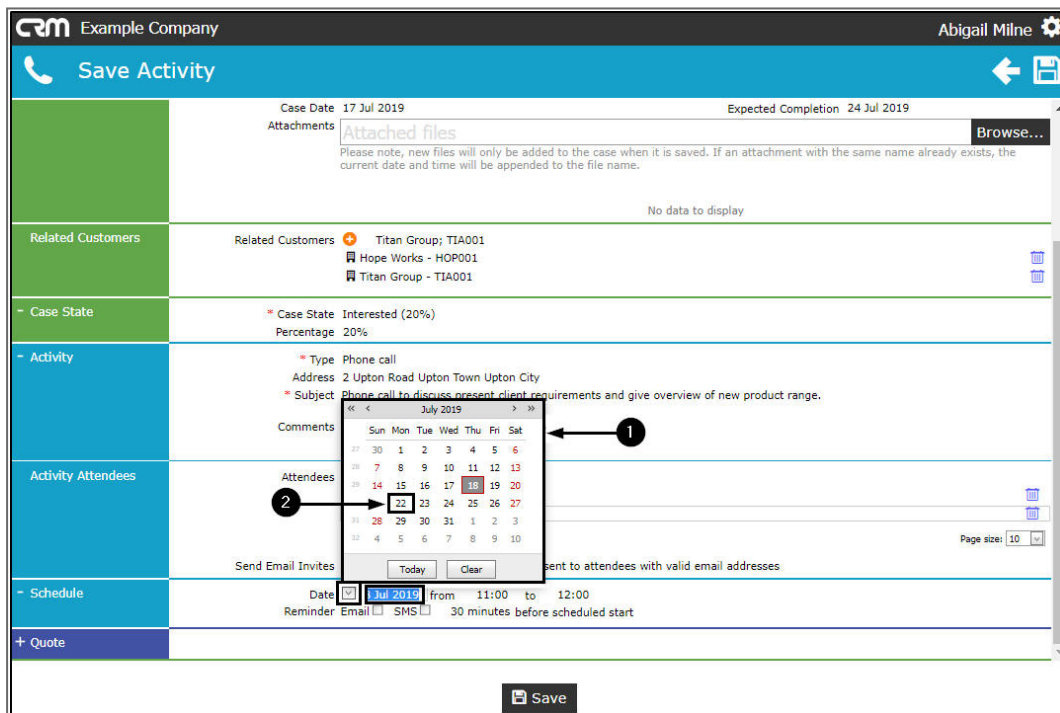
\*note that invitations can only be sent to attendees with valid email addresses

Schedule: Date: 17 Jul 2019 From: 11:00 to 12:00  
Reminder Email: ☐ SMS: ☐ 30 minutes before scheduled start

+ Quote

**Save**

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



CRM Example Company Abigail Milne

**Save Activity**

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: Titan Group - TIA001, Hope Works - HOP001, Titan Group - TIA001

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: xxxxx

Activity Attendees: Jackie Sutherland, Kelly Jones, Jackie Sutherland

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

\*note that invitations can only be sent to attendees with valid email addresses

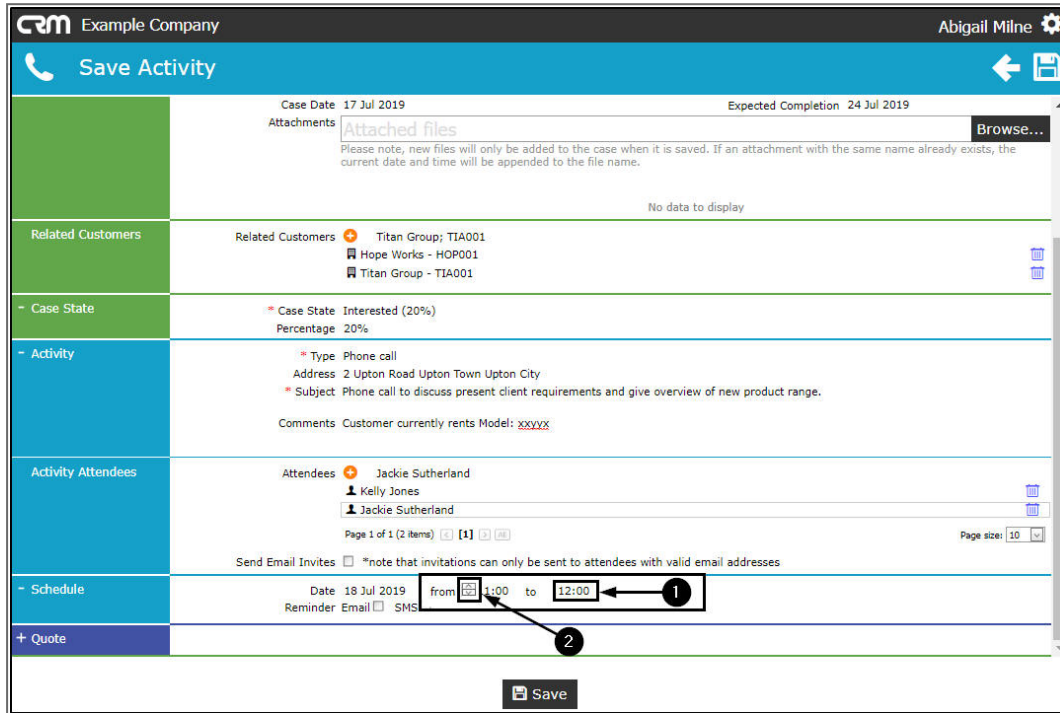
Schedule: Date: 18 Jul 2019 From: 11:00 to 12:00  
Reminder Email: ☐ SMS: ☐ 30 minutes before scheduled start

+ Quote

**Save**

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.



CRM Example Company Abigail Milne

**Save Activity**

Case Date: 17 Jul 2019 Expected Completion: 24 Jul 2019

Attachments: Attached files [Browse...](#)

No data to display

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, Comments Customer currently rents Model: xyxyx

Activity Attendees: Attendees Jackie Sutherland, Kelly Jones, Jackie Sutherland

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

Send Email Invites ☐ \*note that invitations can only be sent to attendees with valid email addresses

Schedule: Date 18 Jul 2019 from 11:00 to 12:00

Reminder Email ☐ SMS

+ Quote

**Save**

## REMINDER EMAIL / SMS

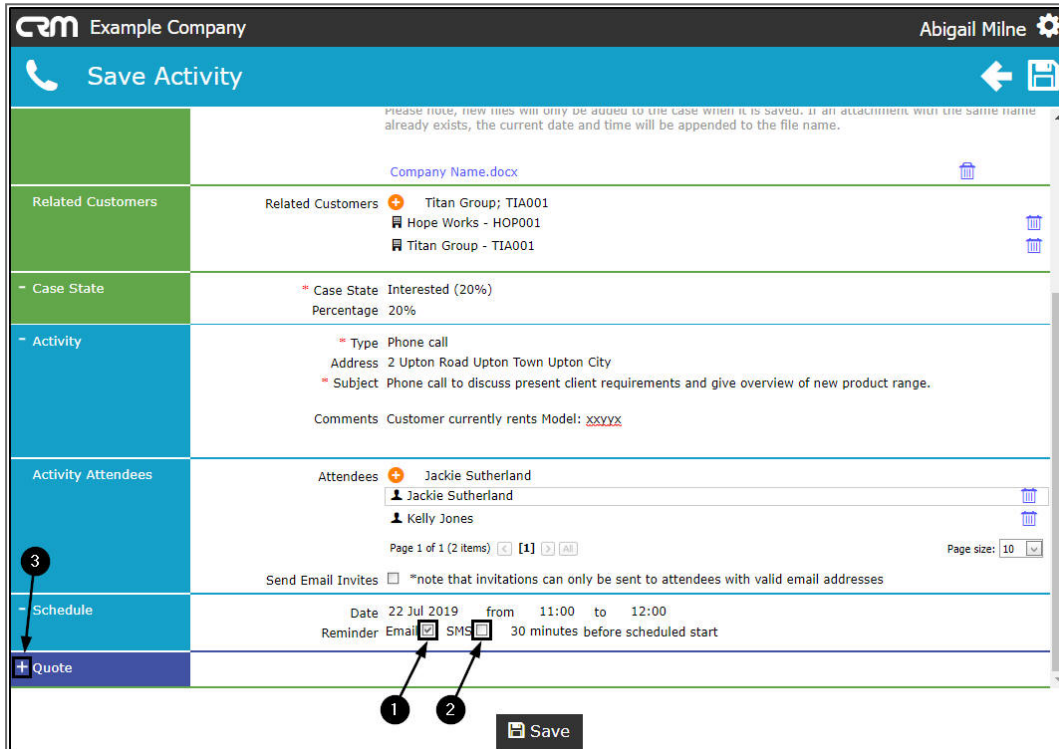
1. **Reminder Email:** Select this check box if you wish to have a reminder email sent to you, 30 minutes before the Activity start time.
2. **Reminder SMS:** Select this check box if you wish to have a reminder SMS sent to you, 30 minutes before the Activity start time.
  - **Note:** These reminders will only 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.



The screenshot shows the 'Save Activity' form in a CRM system. The form has a sidebar on the left with sections: Related Customers, Case State, Activity, Activity Attendees, Schedule, and Quote. The main area displays details for each section. The Quote section is at the bottom, and a 'Save' button is visible. Arrows and numbers 1, 2, and 3 indicate the steps to expand the Quote section and click the Save button.

- The **Quote** section will be expanded to expose the:
  - **Quote Financials**
  - **Add Quotes Items**
  - and **Quote Items** frames.
- 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.

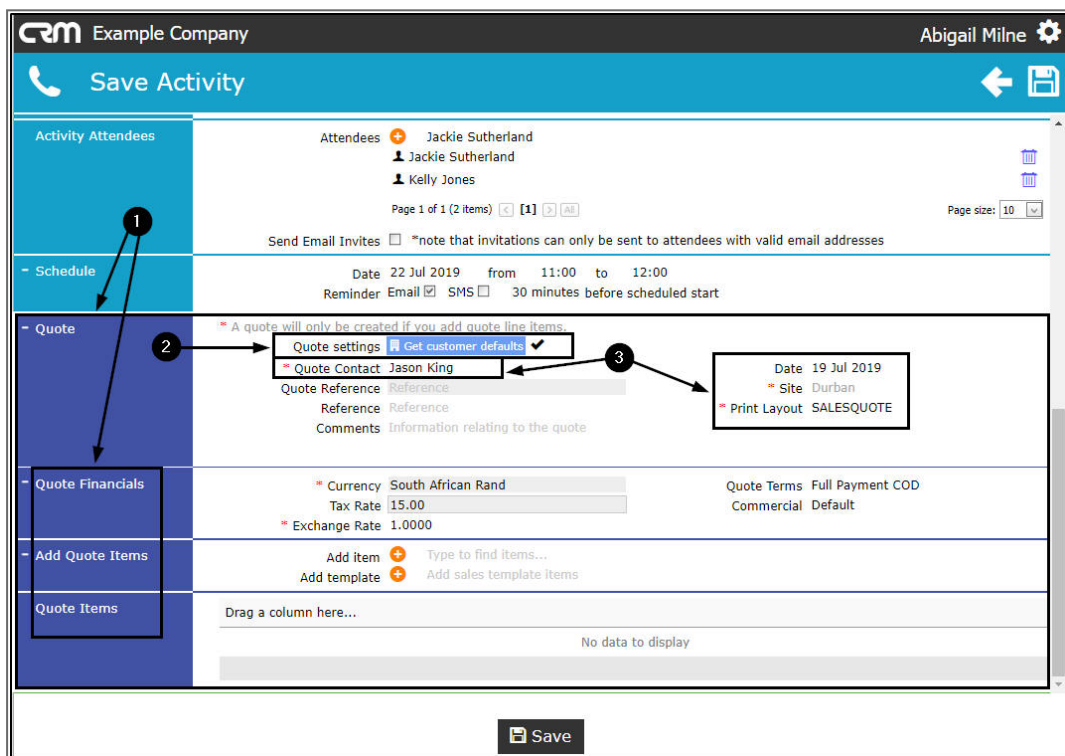
- You can click on the drop-down arrow and select an alternative contact from the drop-down list, if required.

**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.



The screenshot shows the 'Save Activity' form in a CRM system. The form is divided into several sections: 'Activity Attendees', 'Schedule', 'Quote', 'Quote Financials', 'Add Quote Items', and 'Quote Items'. Annotations 1, 2, and 3 point to specific fields in the 'Quote' section. Annotation 1 points to the 'Quote Contact' field, which currently shows 'Jason King'. Annotation 2 points to the 'Quote Reference' field, which is currently empty. Annotation 3 points to the 'Quote Date' field, which shows '19 Jul 2019'. The 'Quote' section also includes fields for 'Quote Reference', 'Reference', 'Comments', 'Quote Settings', 'Quote Contact', 'Quote Reference', 'Reference', and 'Comments'. The 'Quote Financials' section includes fields for 'Currency', 'Tax Rate', 'Exchange Rate', 'Quote Terms', and 'Full Payment COD'. The 'Add Quote Items' section includes 'Add item' and 'Add template' buttons. The 'Quote Items' section is currently empty, showing 'No data to display'.

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

---

2. **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.

CRM

Example Company

Abigail Milne

Save Activity

Activity Attendees

Attendees

Jackie Sutherland

Jackie Sutherland

Kelly Jones

Page 1 of 1 (2 items)

<

[1]

>

ALL

Send Email Invites

\*note that invitations can only be sent to attendees with valid email addresses

Schedule

Date

22 Jul 2019

from

11:00

to

12:00

Reminder

Email

SMS

30 minutes before scheduled start

Quote

\* A quote will only be created if you add quote line items.

Quote settings

Get customer defaults

\* Quote Contact

Jason King

Date

19 Jul 2019

Quote Reference

Reference

Reference

Reference

Comments

Information relating to the quote

\* 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 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.


Example Company

Abigail Milne



Save Activity



Activity Attendees


Attendees

Jackie Sutherland  
Kelly Jones  
Jackie Sutherland  
Page 1 of 1 (2 items)

1

All

Send Email Invites
☐
\*note that invitations can only be sent to attendees with valid email addresses

Schedule

Date 22 Jul 2019 from 13:00 to 14:00  
Reminder Email ☒ SMS ☐ 30 minutes before scheduled start



Quote

\* A quote will only be created if you add quote line items.  
Quote settings  Get customer defaults ☒  
\* Quote Contact Jason King Date 19 Jul 2019  
Quote Reference Reference Site Durban  
Reference Q/KE/001 \* Print Layout SALESQUOTE  
Comments Quote for old rental machine to be replaced with a new model.

Quote Financials


\* Currency South African Rand Quote Terms Full Payment COD  
Tax Rate 15.00 Commercial Default  
\* Exchange Rate 1.0000

Add Quote Items

Add item    
Add template  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.



CRM Example Company Abigail Milne

**Save Activity**

---

**Activity Attendees**

Attendees + Jackie Sutherland  
 Kelly Jones  
 Jackie Sutherland

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

Send Email Invites ☐ \*note that invitations can only be sent to attendees with valid email addresses

---

**Schedule**

Date 22 Jul 2019 from 13:00 to 14:00  
 Reminder Email ☒ SMS ☐ 30 minutes before scheduled start

---

**Quote**

\* A quote will only be created if you add quote line items.  
 Quote settings [Get customer defaults](#) ✓  
 Quote Contact Jason King  
 Quote Reference Reference  
 Reference Q/KE/001  
 Comments Quote for old rental machine to be replaced with a new model.

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 +  
 Add template +

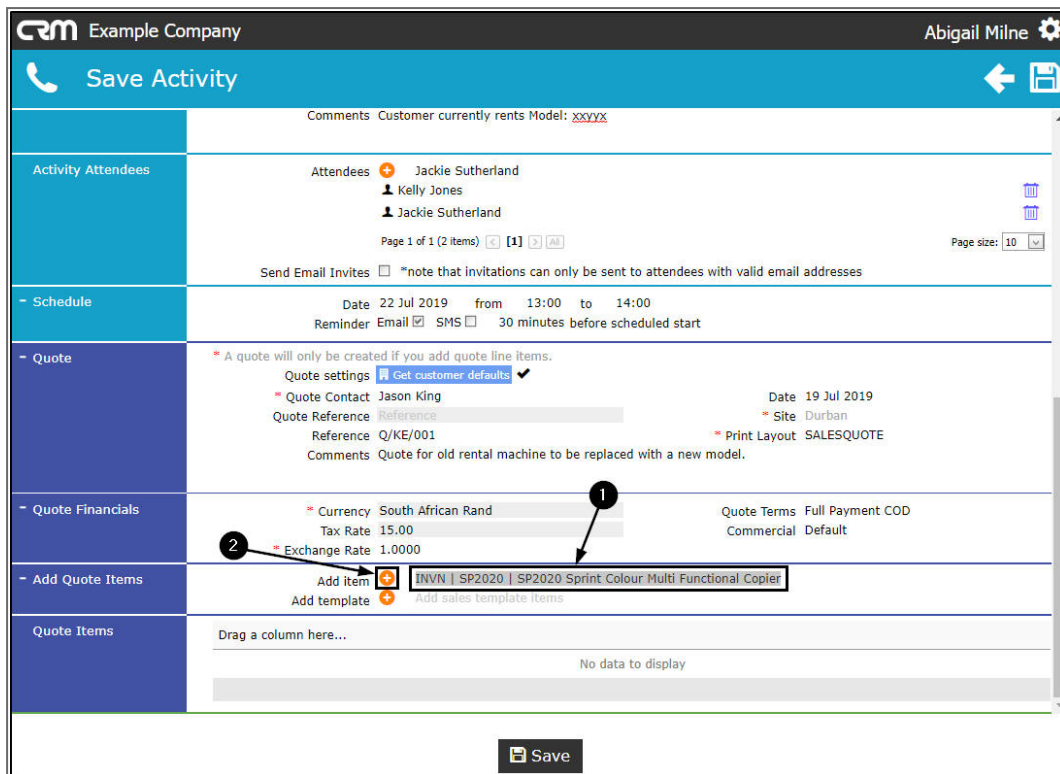
Drag a column here...

**Quote Items**

Type	Code	Description	#
INWN	SP2020	SP2020 Sprint Colour Multi Functiona	1
INWN	SP1818	Sprint copier	12
INWN	1458-96523	K147 Kyocera Colour	13
INWN	K04250MFP	Konica Minolta Colour Multi-Functions	20
INWN	SP19-123456	SP19-12 Colour	22
INWN	SP204	SP204 Colour	26
INWN	SP1020	Copier	57

**Save**

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



CRM Example Company Abigail Milne

**Save Activity**

Comments Customer currently rents Model: xxxx

**Activity Attendees**

Attendees Jackie Sutherland  
Kelly Jones  
Jackie Sutherland

Page 1 of 1 (2 items) [1] [All]

Send Email Invites ☐ \*note that invitations can only be sent to attendees with valid email addresses

**Schedule**

Date 22 Jul 2019 from 13:00 to 14:00  
Reminder Email ☒ SMS ☐ 30 minutes before scheduled start

**Quote**

\* A quote will only be created if you add quote line items.  
Quote settings ☒ Get customer defaults ✓  
Quote Contact Jason Kling Date 19 Jul 2019  
Quote Reference Reference Site Durban  
Reference Q/KE/001 \* Print Layout SALESQUOTE  
Comments Quote for old rental machine to be replaced with a new model.

**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 **1**  
Add template  
INVN | SP2020 | SP2020 Sprint Colour Multi Functional Copier

**Quote Items**


Drag a column here...  
No data 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 edit the item details e.g. quantity, price, if required.
  - ii. A **Delete** button. This will enable you to delete the item from the quote, if required.


## EDIT QUOTE ITEM




3. Click on the **Edit** button.



Example Company

Abigail Milne



Save Activity




Jackie Sutherland

Page 1 of 1 (2 items)




Page size: 10




Send Email Invites ☐ \*note that invitations can only be sent to attendees with valid email addresses

Schedule

Date 22 Jul 2019 from 13:00 to 14:00  
Reminder Email ☒ SMS ☐ 30 minutes before scheduled start

Quote

\* A quote will only be created if you add quote line items.



Quote settings  [Get customer defaults](#) 

Quote Contact Jason King Date 19 Jul 2019  
Quote Reference  Site Durban  
Reference Q/KE/001 \* Print Layout SALESQUOTE  
Comments Quote for old rental machine to be replaced with a new model.



Quote Financials


\* Currency South African Rand Quote Terms Full Payment COD  
Tax Rate 15.00 Commercial Default  
\* Exchange Rate 1.0000

Add Quote Items

Add item  Type to find items...  
Add template  Add sales 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	SP2020 Sprint Colour Multi Functional Copier	1	5610.67	5400.00		5400.00	 	6210.00
				5610.67	5400.00	0.00	5400.00		6210.00


Save

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
6. Click on the **Apply Changes** icon [  ] to save your changes or the the **Cancel changes** icon [  ] to cancel the changes, as required.

CRM Example Company Abigail Milne

## Save Activity

Page 1 of 1 (2 items) Page size: 10

Send Email Invites ☐ \*note that invitations can only be sent to attendees with valid email addresses

**Schedule**  
 Date: 22 Jul 2019 from 13:00 to 14:00  
 Reminder: Email ☒ SMS ☐ 30 minutes before scheduled start

**Quote**  
 \* A quote will only be created if you add quote line items.  
 Quote settings [Get customer defaults](#) ☒  
 Quote Contact: Jason King Date: 19 Jul 2019  
 Quote Reference:  Site: Durban  
 Reference: Q/KE/001 \* Print Layout: SALESQUOTE  
 Comments: Quote for old rental machine to be replaced with a new model.

**Quote Financials**  
 Currency: South African Rand Quote Terms: Full Payment COD  
 Tax Rate: 15.00 Commercial: Default  
 Exchange Rate: 1.0000

**Add Quote Items**  
 Add item + Type to find items...  
 Add template + Add sales template 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

**Quote Items**

Quote Item Description:  Quantity:  Unit Cost:  Item Price:  ☒ ☐

1. In this example, the changes have been cancelled and the original item details remain.

## LINK ADDITIONAL QUOTE ITEMS

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

CRM

Example Company

Abigail Milne

Save Activity

Activity Attendees

Attendees

Jackie Sutherland

Kelly Jones

Jackie Sutherland

Page 1 of 1 (2 items)

Send Email Invites ☐ \*note that invitations can only be sent to attendees with valid email addresses

Schedule

Date: 22 Jul 2019 from 13:00 to 14:00

Reminder: Email ☒ SMS ☐ 30 minutes before scheduled start

Quote

\* A quote will only be created if you add quote line items.

Quote settings [Get customer defaults](#)

Quote Contact: Jason King Date: 19 Jul 2019

Quote Reference: Reference Site: Durban

Reference: Q/KE/001 Print Layout: SALESQUOTE

Comments: Quote for old rental machine to be replaced with a new model.

Quote Financials

Currency: South African Rand Quote Terms: Full Payment COD

Tax Rate: 15.00 Commercial: Default

Exchange Rate: 1.0000

Add Quote Items

Add item

Add template

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		6210.00
				5610.67	5400.00	0.00	5400.00		6210.00

Save

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.

CRM Example Company Abigail Milne

## Save Activity

Activity Attendees

Attendees Jackie Sutherland  
Kelly Jones  
Jackie Sutherland

Page 1 of 1 (2 items) [1] [2] [All]

Send Email Invites ☐ \*note that invitations can only be sent to attendees with valid email addresses

Page size: 10

Schedule

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Quote settings [Get customer defaults](#) ✓

Quote Contact: Jason King Date: 19 Jul 2019  
Quote Reference: Reference Site: Durban  
Reference: Q/KE/001 \* Print Layout: SALESQUOTE  
Comments: Quote for old rental machine to be replaced with a new model.

Quote Financials

\* Currency: South African Rand Quote Terms: Full Payment COD  
Tax Rate: 15.00 Commercial: Default  
\* Exchange Rate: 1.0000

Add Quote Items

Add item  Add template

Type	Code	Description	#
INVN	2020-147K	Black Toner SP2020	2
INVN	SP19-147K	Black Toner SP1919	4
INVN	SP19-147Y	Yellow Toner SP1919	6
INVN	SP19-147M	Magenta Toner SP1919	7
INVN	2020-147M	Magenta Toner SP2020	8
INVN	2020-147C	Cyan Toner SP2020	9
INVN	147-888544	K147 Black Toner	14

Item Type: INVN Item Code: SP2020

5610.67 5400.00 0.00 5400.00 6210.00

Save

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

CRM

Example Company

Abigail Milne

Save Activity

Activity Attendees

Attendees

Jackie Sutherland

Kelly Jones

Jackie Sutherland

Page 1 of 1 (2 items)

Send Email Invites

\*note that invitations can only be sent to attendees with valid email addresses

Schedule

Date: 22 Jul 2019 from 13:00 to 14:00

Reminder: Email ☒ SMS ☐ 30 minutes before scheduled start

Quote

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Quote settings [Get customer defaults](#)

Quote Contact: Jason King

Quote Reference: [Reference](#)

Reference: Q/KE/001

Comments: Quote for old rental machine to be replaced with a new model.

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

Add template

INVN | 2020-147K | Black toner SP2020

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	<a href="#">Edit</a> <a href="#">Delete</a>	6210.00
				5610.67	5400.00	0.00	5400.00		6210.00


Save




1. The additional 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**.


Example Company

Abigail Milne



Save Activity



Page 1 of 1 (2 items)
☐ 1
☐ 2
☐ All

Page size: 10


Send Email Invites ☐ \*note that invitations can only be sent to attendees with valid email addresses

Schedule

Date 22 Jul 2019 from 13:00 to 14:00  
Reminder Email ☒ SMS ☐ 30 minutes before scheduled start

Quote

\* A quote will only be created if you add quote line items.

Quote settings  [Get customer defaults](#) ☒

\* Quote Contact Jason King Date 19 Jul 2019  
\* Site Durban

Quote Reference   
Reference Q/KE/001 \* Print Layout SALESQUOTE

Comments Quote for old rental machine to be replaced with a new model.





Quote Financials


\* Currency South African Rand Quote Terms Full Payment COD  
Tax Rate 15.00 Commercial Default  
\* Exchange Rate 1.0000

Add Quote Items

Add item ☒ Type to find items...  
Add template ☒ Add sales template items

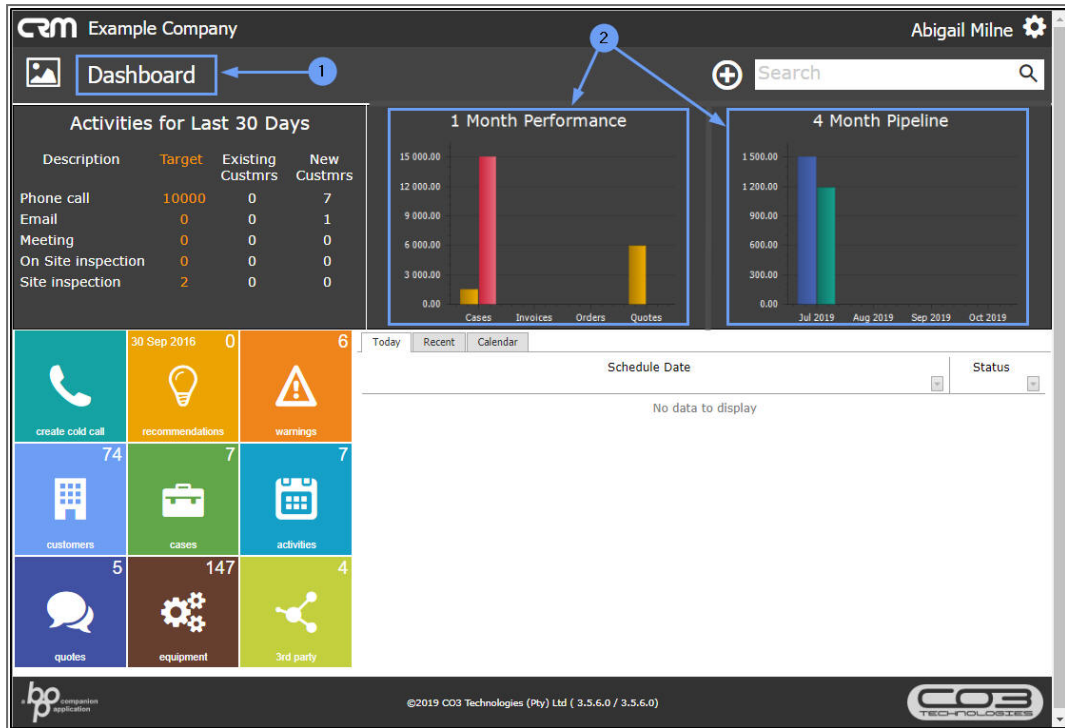
Quote Items

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	1	5610.67	5400.00		5400.00	 	6210.00
INVN	2020-147K	Black toner SP2020	1	481.70	526.63	526.63	526.63	 	605.62
				6092.37	5926.63	526.63	5926.63		6815.62

 Save

- 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](#)

CRM.000.006

