

CRM BASICS

ACTIVITIES

In CRM, an activity is any type of interaction that involves your customer:

- A Call
- An Email
- A Meeting
- An On-Site Inspection

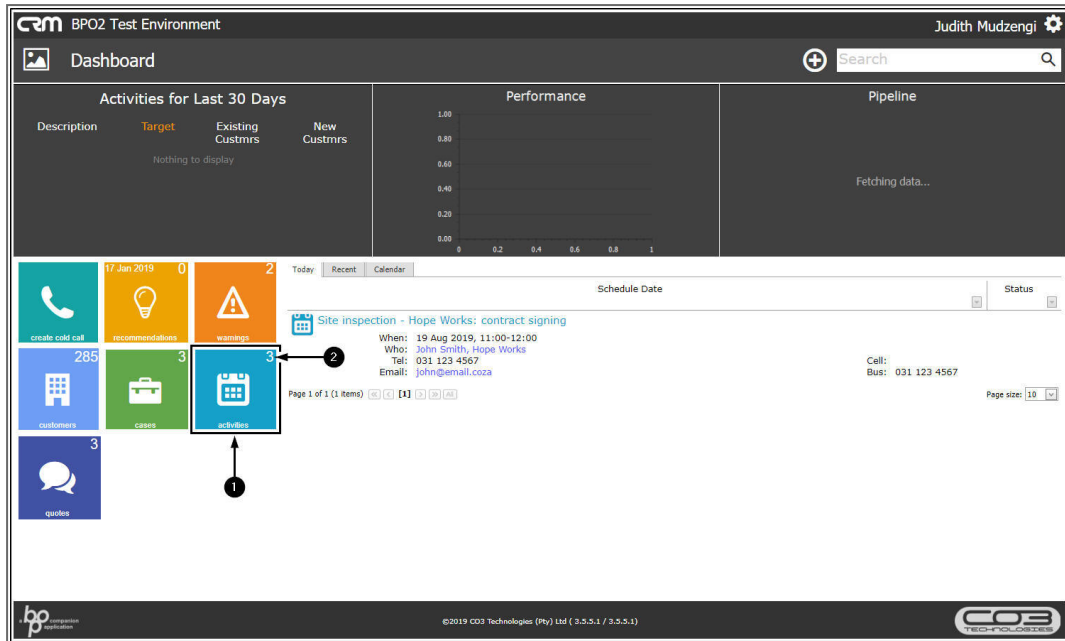
Client specific activities can be accessed from Customer Homepage.

A full list of all customers activities can be accessed from the **Homepage** as set out below.

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

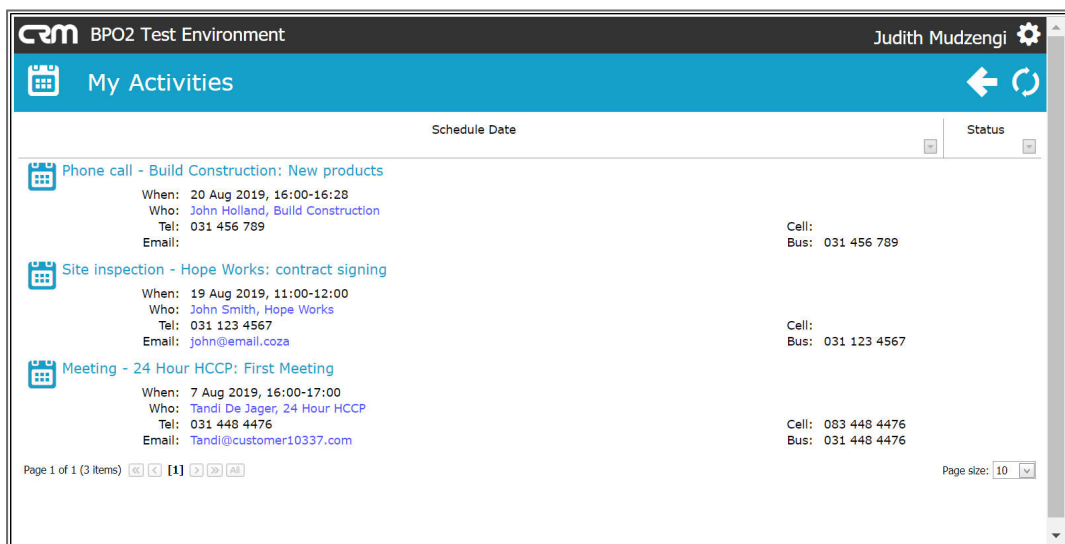
CUSTOMERS ACTIVITIES FROM THE HOMEPAGE

1. Click on the **Activities** tile in the **Homepage**.
2. The **number** in the top right of this tile shows you the amount of open activities.

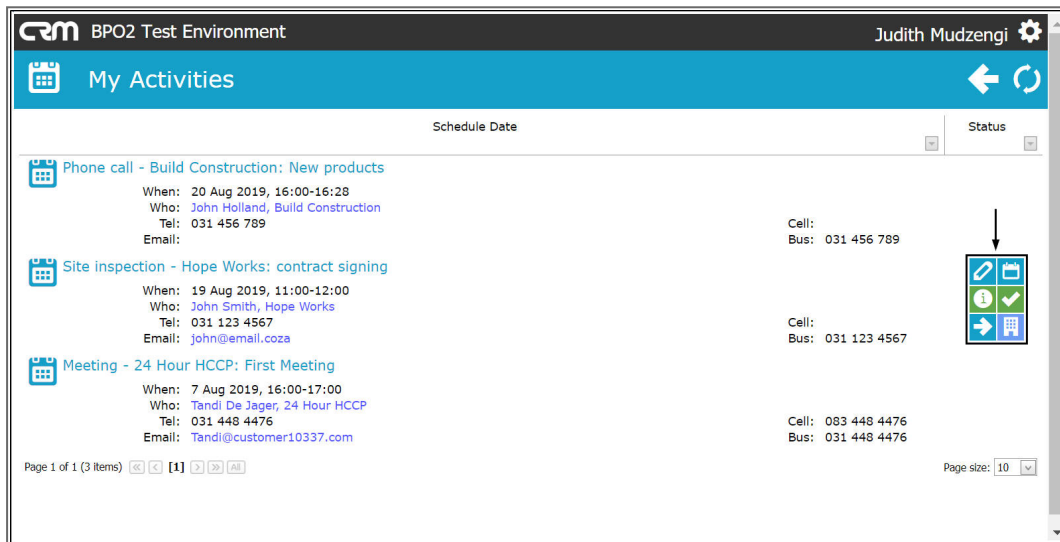


MY ACTIVITIES PAGE

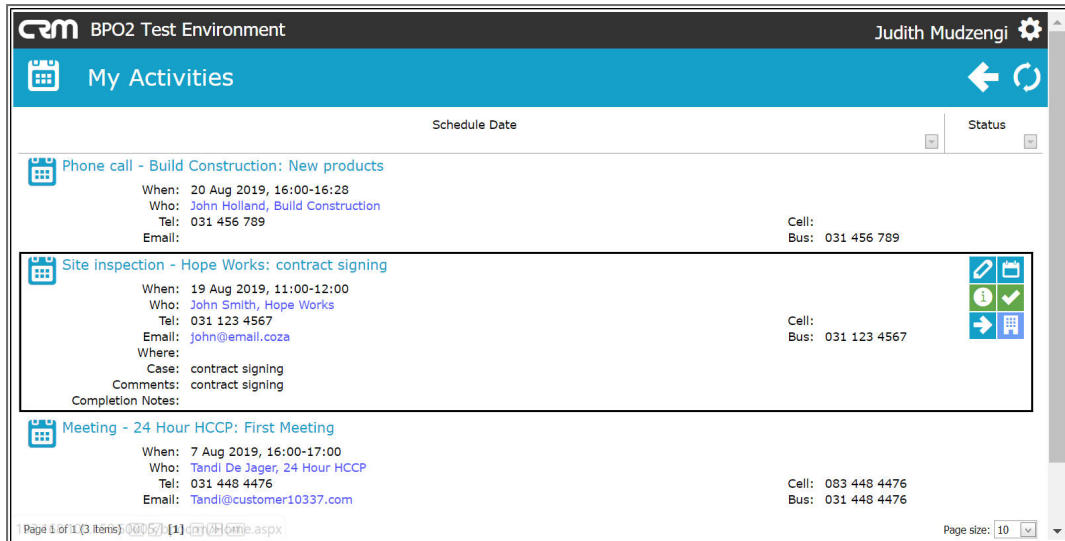
- **My Activities** page will be open.
- A list of activities will be displayed (where you have open activities).



- **Action** buttons are available by hovering over an **Activity** , and the options are:
 - Reschedule this Activity
 - View / Edit Activity
 - Close this Case
 - View Case Info and History
 - View Customer
 - Next Action (close current activity and create new activity)

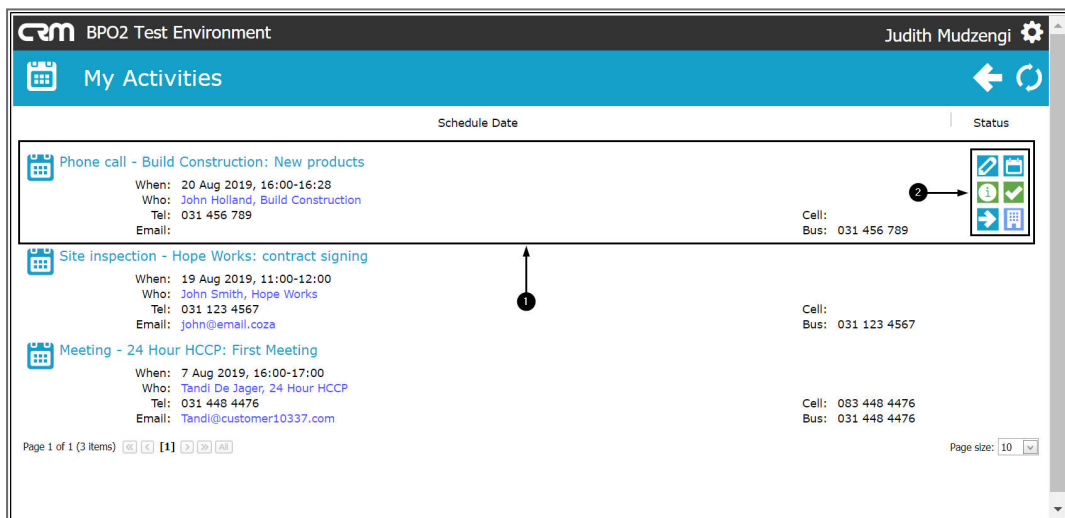


- Click on an **Activity** to access a quick view summary of the activity information.



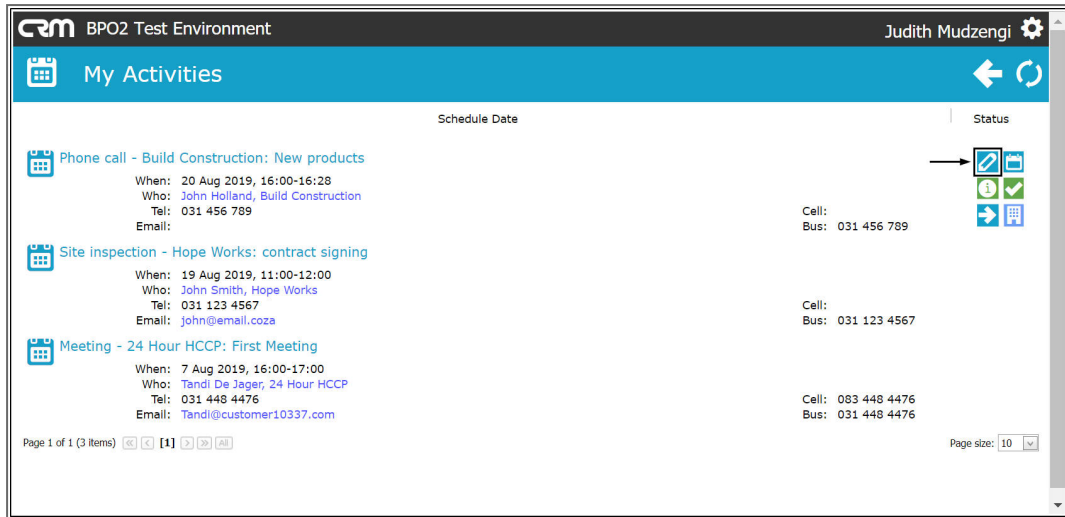
ACTION BUTTONS

1. Hover over an activity.
2. **Action** buttons will be displayed.



VIEW / EDIT ACTIVITY

- Click on the **View / Edit this Activity** icon.



CRM BPO2 Test Environment Judith Mudzengi

My Activities

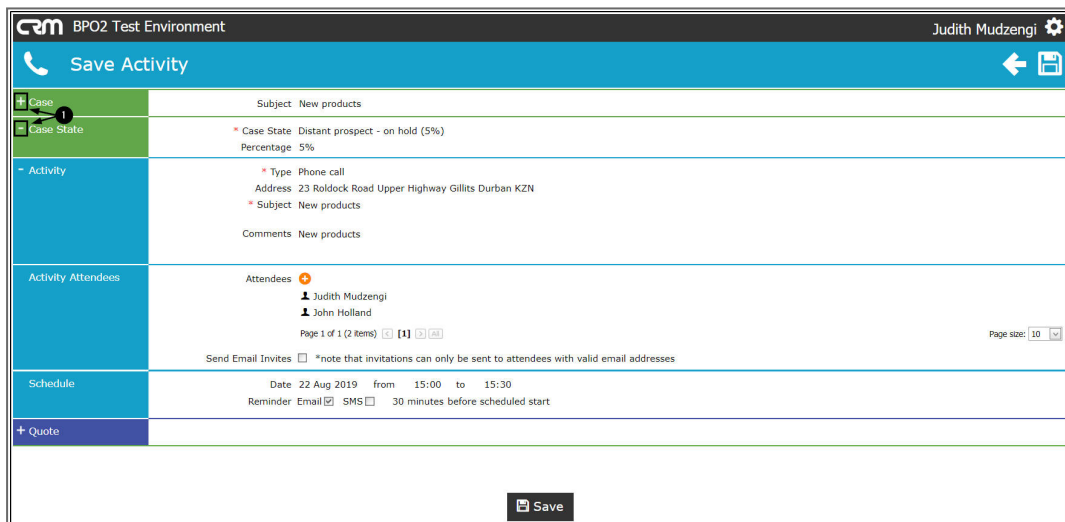
Schedule Date | Status

- Phone call - Build Construction: New products**
 - When: 20 Aug 2019, 16:00-16:28
 - Who: John Holland, Build Construction
 - Tel: 031 456 789
 - Email:
 - Cell: 031 456 789
 - Bus: 031 456 789
- Site inspection - Hope Works: contract signing**
 - When: 19 Aug 2019, 11:00-12:00
 - Who: John Smith, Hope Works
 - Tel: 031 123 4567
 - Email: john@email.co.za
 - Cell: 031 123 4567
 - Bus: 031 123 4567
- Meeting - 24 Hour HCCP: First Meeting**
 - When: 7 Aug 2019, 16:00-17:00
 - Who: Tandi De Jager, 24 Hour HCCP
 - Tel: 031 448 4476
 - Email: Tandi@customer10337.com
 - Cell: 083 448 4476
 - Bus: 031 448 4476

Page 1 of 1 (3 items) [1] [2] [3] [4] Page size: 10

Save Activity

- The **Save Activity** screen will be displayed.
 - Click on the ' + ' sign to view more details or the - ' sign to view less details.



CRM BPO2 Test Environment Judith Mudzengi

Save Activity

Case Subject: New products

Case State * Case State: Distant prospect - on hold (5%)
Percentage: 5%

Activity * Type: Phone call
Address: 23 Roldock Road Upper Highway Gillits Durban KZN
* Subject: New products
Comments: New products

Activity Attendees Attendees: Judith Mudzengi, John Holland
Page 1 of 1 (2 items) [1] [2] [3] [4] Page size: 10

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

Schedule Date: 22 Aug 2019 from 15:00 to 15:30
Reminder: Email ☒ SMS ☐ 30 minutes before scheduled start

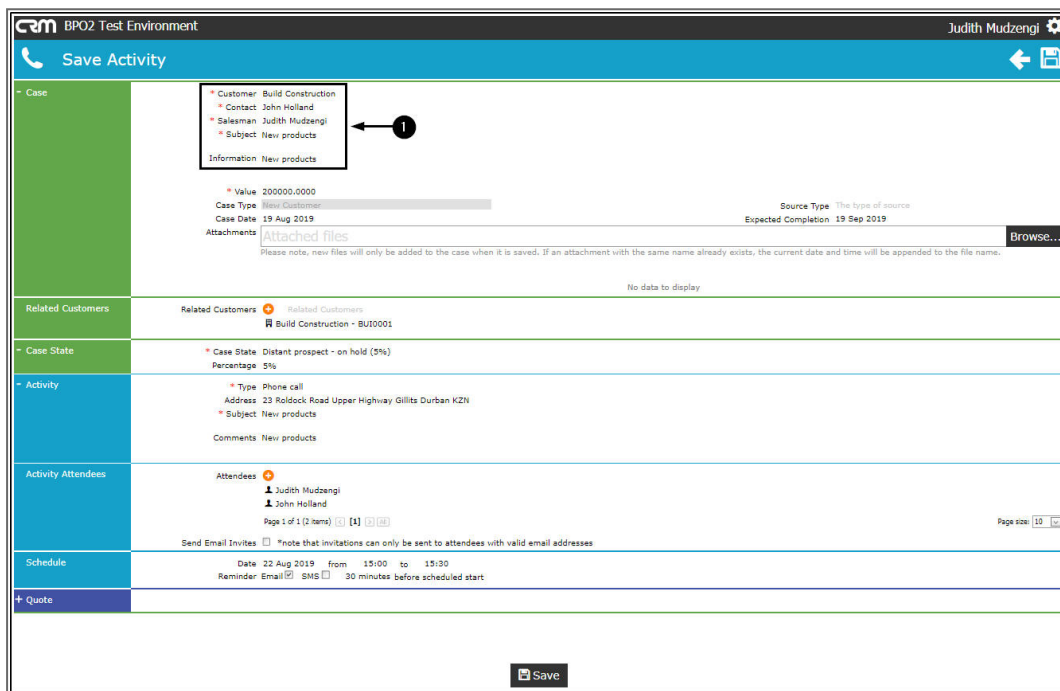
+ Quote

Save

1. CASE DETAILS

- Customer** : The customer will auto populate. This field cannot be edited.

- **Contact** : The contact will auto populate. Click in this field to display a list of all the contacts linked to the selected customer. Select the relevant contact if applicable.
- **Salesman** : The salesman will auto populate. This field cannot be edited.
- **Subject** : Delete and type in the relevant subject if applicable.
- **Information** : Delete and type in the relevant information if applicable.



CRM BPO2 Test Environment Judith Mudzengi

Save Activity

Case

- * Customer: Build Construction
- * Contact: John Holland
- * Salesman: Judith Mudzengi
- * Subject: New products
- Information: New products

* Value: 200000.0000

Case Type: New customer

Case Date: 19 Aug 2019

Source Type: The type of source

Expected Completion: 19 Sep 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: Build Construction - BU00001

Case State

* Case State: Distant prospect - on hold (5%)

Percentage: 5%

Activity

* Type: Phone call

Address: 23 Roldock Road Upper Highway Gillits Durban KZN

* Subject: New products

Comments: New products

Activity Attendees

Attendees:

- Judith Mudzengi
- John Holland

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

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

Schedule

Date: 22 Aug 2019 from 15:00 to 15:30

Reminder: Email ☐ SMS ☐ 30 minutes before scheduled start

Quote

[Save](#)

1. Case Details Continue

- **Value** : Type in or edit the estimated value if required.
- **Case Type** : The case type will auto populate. This field cannot be edited.
- **Case Date** : Click on the drop-down arrow and select the required date from the calendar if applicable.

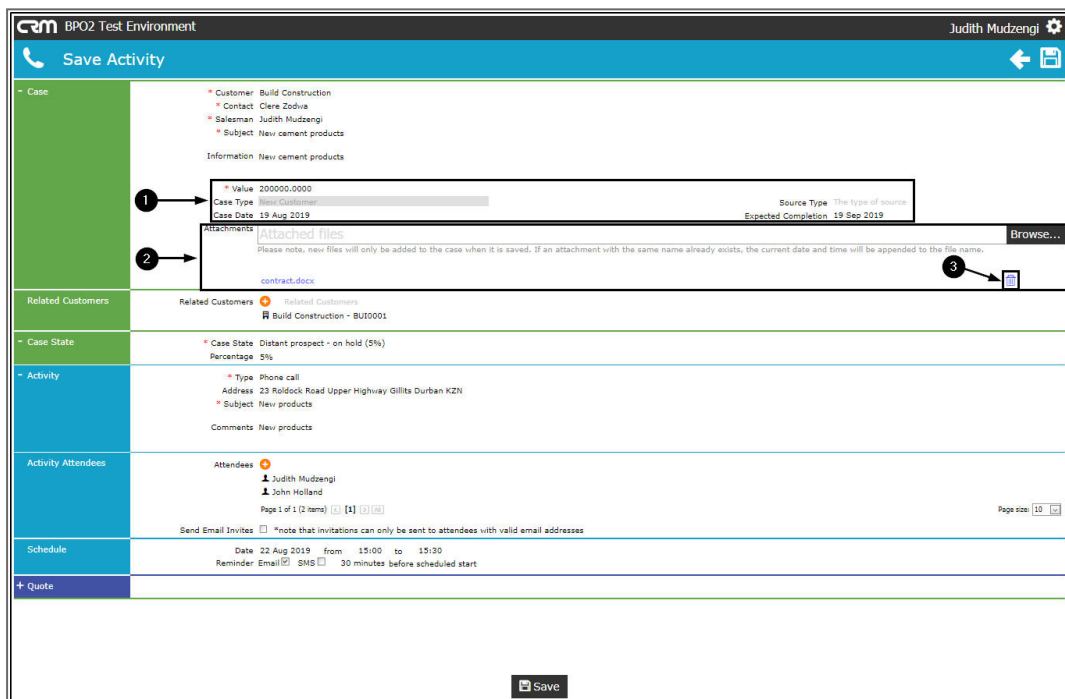
- **Source Type** : Click in this field to display a list of all source types and select the required source type if applicable.
- **Expected Completion** : Click on the drop-down arrow and select the required date if applicable.

2.

- **Attachments** : You can add (hyperlink needed 000.014) an attachment if applicable.0

3.

- **Attachments** : You can also delete an attachment by clicking on the **Delete** icon if applicable.



The screenshot shows the 'Save Activity' form in the CO3 BPO2 Test Environment. The form is titled 'Save Activity' and has a user profile for Judith Mudzengi. The form is divided into several sections:

- Case**: Includes fields for Value (200000.0000), Case Type (New Construction), Case Date (19 Aug 2019), Source Type (The type of source), and Expected Completion (19 Sep 2019).
- Related Customers**: Includes a list of related customers, such as 'Build Construction - BU10001'.
- Case State**: Includes a field for Case State (Distant prospect - on hold (5%)) and Percentage (5%).
- Activity**: Includes a field for Type (Phone call), Address (23 Roldock Road Upper Highway Gills Durban KZN), Subject (New products), and Comments (New products).
- Activity Attendees**: Includes a list of attendees, such as 'Judith Mudzengi' and 'John Holland'. It also includes a 'Send Email Invites' checkbox and a note that invitations can only be sent to attendees with valid email addresses.
- Schedule**: Includes a field for Date (22 Aug 2019), Time (15:00 to 15:30), and Reminder (Email, SMS, 30 minutes before scheduled start).
- Quote**: A section at the bottom of the form.

At the bottom right of the form is a 'Save' button.

- A message box will pop up asking you;
 - **Are you sure you want to remove the attachment from the case? You cannot undo this action.**
- Click on **Ok**.

CRM BPO2 Test Environment

Judith Mudzengi

Save Activity

Case

Customer: Build Construction

Contact: Clere Zodwa

Salesman: Judith Mudzengi

Subject: New cement products

Information: New cement products

Value: 150000.0000

Case Type: CRMCCTNEWC

Case Date: 23 Aug 2019

Source Type: Referral

Expected Completion: 30 Aug 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...

contract.docx

Related Customers

Related Customers

Build Construction - BU10001

Case State

Case State: Distant prospect - on hold (5%)

Percentage: 5%

Activity

Type: Phone call

Address: 23 Roldock Road Upper Highway Gillits Durban KZN

Subject: New products

Comments: New products

Activity Attendees

Attendees

Judith Mudzengi

Clere Zodwa

John Holland

Page 1 of 1 (3 items)

Send Email Invites

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

Schedule

Date: 22 Aug 2019

from: 15:00

to: 15:30

Reminder: Email

SMS

30 minutes before scheduled start

Quote

Save

192.168.100.150:60005 says

Are you sure you want to remove this attachment from the case?

You cannot undo this action.

OK

Cancel

- The attachment will be removed from the **Case** section.

CRM BPO2 Test Environment

Judith Mudzengi

Save Activity

Case

Customer: Build Construction

Contact: Clere Zodwa

Salesman: Judith Mudzengi

Subject: New cement products

Information: New cement products

Value: 150000.0000

Case Type: CRMCCTNEWC

Case Date: 23 Aug 2019

Source Type: Referral

Expected Completion: 30 Aug 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

Build Construction - BU10001

Case State

Case State: Distant prospect - on hold (5%)

Percentage: 5%

Activity

Type: Phone call

Address: 23 Roldock Road Upper Highway Gillits Durban KZN

Subject: New products

Comments: New products

Activity Attendees

Attendees

Judith Mudzengi

Clere Zodwa

John Holland

Page 1 of 1 (3 items)

Send Email Invites

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

Schedule

Date: 22 Aug 2019

from: 15:00

to: 15:30

Reminder: Email

SMS

30 minutes before scheduled start

Quote

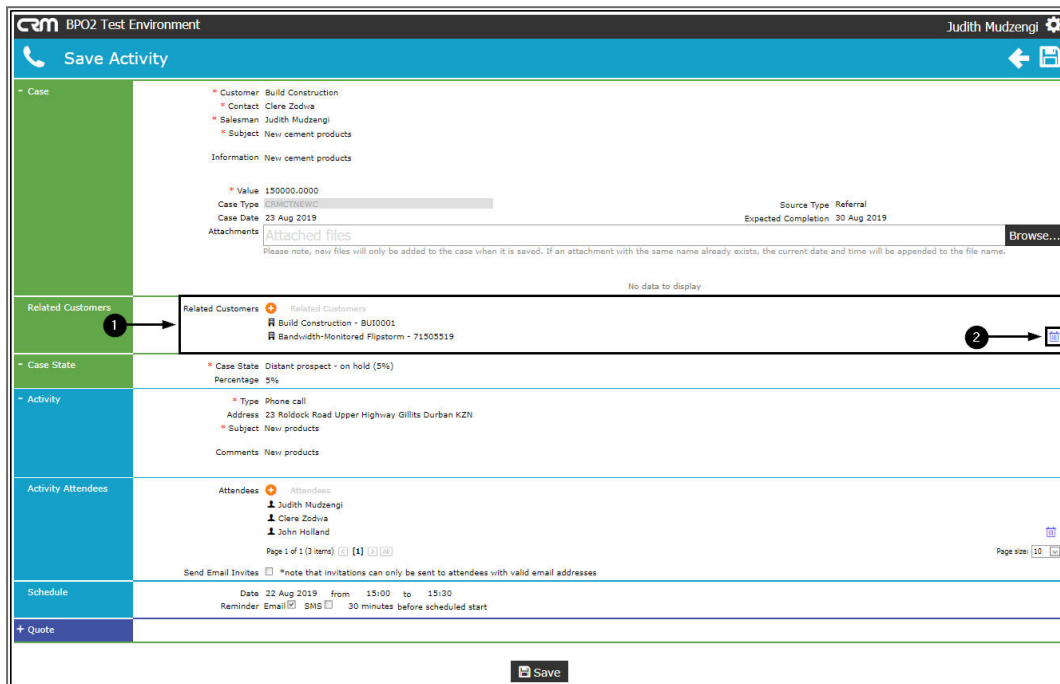
Save

1.

- **Related Customers** : You can add related customers if applicable. (hyperlink needed 000.014)

2.

- **Related Customers** : You can delete a related customer if applicable by clicking on the **Delete** icon.



- A message box will pop up asking you;
 - **Are you sure you want to remove this customer from the case? All this customer's contacts will also be removed from activity attendees.**
- Click on **Ok**.

CRM BPO2 Test Environment

192.168.100.150:60005 says
Are you sure you want to remove this customer from the case?
All this customer's contacts will also be removed from activity attendees.

Judith Mudzengi

Save Activity

Contact: Clere Zodwa

Salesman: Judith Mudzengi

Subject: New cement products

Information: New cement products

Value: 150000.0000

Case Type: CRNCTNEWC

Case Date: 23 Aug 2019

Source Type: Referral

Expected Completion: 30 Aug 2019

Attached files

Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

Browse...

Related Customers

Related Customers

Build Construction - BU10001

Bandwidth-Monitored Flipform - 71500519

Case State

Case State: Distant prospect - on hold (5%)

Percentage: 5%

Activity

Type: Phone call

Address: 23 Roldock Road Upper Highway Gillits Durban KZN

Subject: New products

Comments: New products

Activity Attendees

Attendees

Judith Mudzengi

Clere Zodwa

John Holland

Page 1 of 1 (3 items)

Send Email Invites

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

Schedule

Date: 22 Aug 2019 from 15:00 to 15:30

Reminder: Email SMS 30 minutes before scheduled start

Quote

Save

- The customer will be removed from the **Related Customers** section.

CRM BPO2 Test Environment

Judith Mudzengi

Save Activity

Customer: Build Construction

Contact: Clere Zodwa

Salesman: Judith Mudzengi

Subject: New cement products

Information: New cement products

Value: 150000.0000

Case Type: CRNCTNEWC

Case Date: 23 Aug 2019

Source Type: Referral

Expected Completion: 30 Aug 2019

Attached files

Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

Browse...

Related Customers

Related Customers

Build Construction - BU10001

Case State

Case State: Distant prospect - on hold (5%)

Percentage: 5%

Activity

Type: Phone call

Address: 23 Roldock Road Upper Highway Gillits Durban KZN

Subject: New products

Comments: New products

Activity Attendees

Attendees

Judith Mudzengi

Clere Zodwa

John Holland

Page 1 of 1 (3 items)

Send Email Invites

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

Schedule

Date: 22 Aug 2019 from 15:00 to 15:30

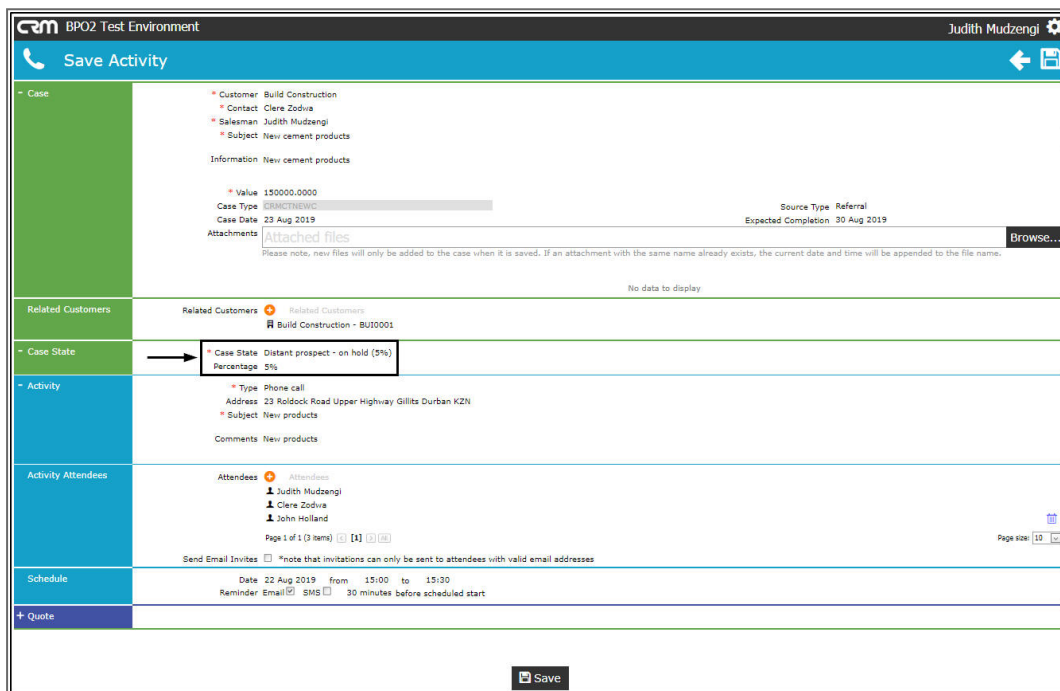
Reminder: Email SMS 30 minutes before scheduled start

Quote

Save

Case State Details

- **Case State** : Click in this field to display a list of all the Case States Descriptions and their Percentages on the system. Select the relevant description if applicable.
- **Percentage** : This field will populate according to the Case State selected.



CRM BPO2 Test Environment Judith Mudzengi

Save Activity

Case

- * Customer: Build Construction
- * Contact: Cleve Zodia
- * Salesman: Judith Mudzengi
- * Subject: New cement products
- Information: New cement products
- * Value: 150000.0000
- Case Type:
- Case Date: 23 Aug 2019
- Source Type: Referral
- Expected Completion: 30 Aug 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: Build Construction - BU10001

Case State

* Case State: Distant prospect - on hold (5%)

Percentage: 5%

Activity

- * Type: Phone call
- Address: 23 Roldock Road Upper Highway Gillits Durban KZN
- * Subject: New products
- Comments: New products

Activity Attendees

Attendees: Judith Mudzengi, Cleve Zodia, John Holland

Page 1 of 1 (3 items)

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

Schedule

Date: 22 Aug 2019 from 15:00 to 15:30

Reminder: Email ☒ SMS ☐ 30 minutes before scheduled start

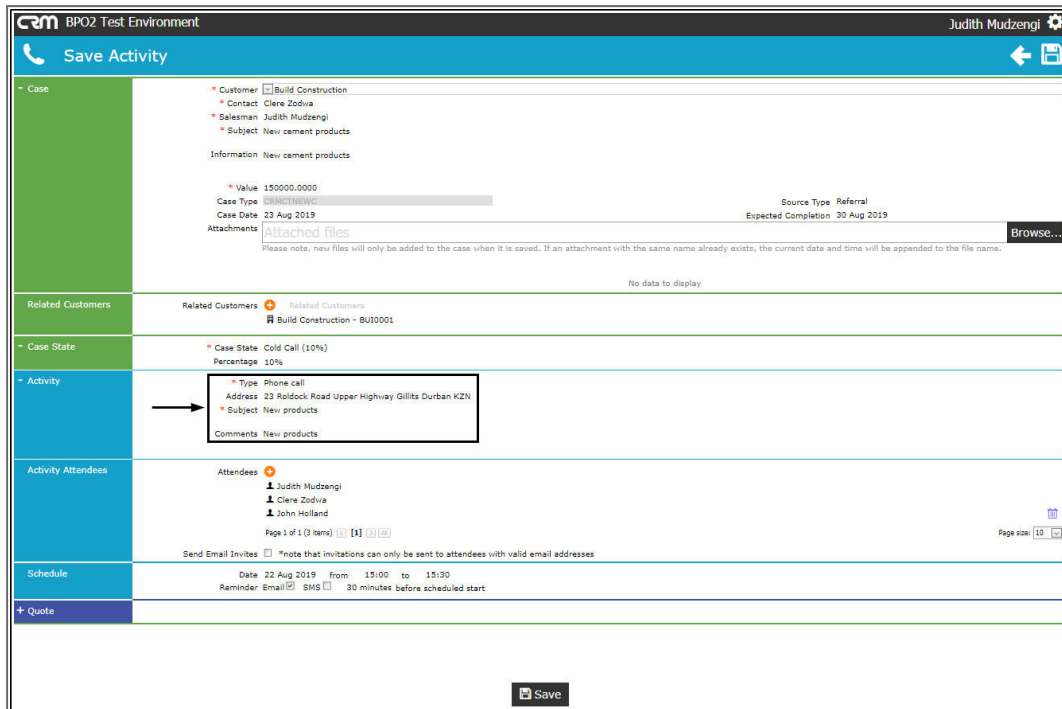
+ Quote

[Save](#)

Activity Details

- **Type** : The type will auto populate. This field cannot be edited.
- **Address** : Click in the Address field, a list of all addresses linked to the customer will be displayed. Select the relevant address from this list if applicable.

- **Subject** : Edit the subject if applicable.
- **Comments** : Edit the comments if applicable.



Save Activity

Case

- Customer: Build Construction
- Contact: Cleve Zodia
- Salesman: Judith Mudzengi
- Subject: New cement products
- Information: New cement products
- Value: 150000.0000
- Case Type: 0000000000
- Case Date: 23 Aug 2019
- Source Type: Referral
- Expected Completion: 30 Aug 2019
- Attachments: Attached files (Browse...)

Related Customers

- Related Customers: Build Construction - BU00001

Case State

- Case State: Cold Call (10%)
- Percentage: 10%

Activity

- Type: Phone call
- Address: 23 Roldock Road Upper Highway Gills Durban KZN
- Subject: New products
- Comments: New products

Activity Attendees

- Attendees: Judith Mudzengi, Cleve Zodia, John Holland
- Page 1 of 1 (3 items)
- Send Email Invites: ☐ (note that invitations can only be sent to attendees with valid email addresses)

Schedule

- Date: 22 Aug 2019 from 15:00 to 15:30
- Reminder: Email ☐ SMS ☐ 30 minutes before scheduled start

Quote

Save

Activity Attendees

1. **Attendees** : You can link additional attendees if applicable. (hyperlink needed 000.014)
2. **Send Email Invites** : Tick the checkbox if you wish to send email invites. Untick the checkbox if you do not wish to send email invites.
3. **Attendees** : You can delete an additional attendee (one who is not the case salesman or case customer contact) if applicable by clicking on the **Delete** icon.

CRM

BPO2 Test Environment

Judith Mudzengi

Save Activity

Case

Customer: Build Construction

Contact: Clare Zodwa

Salesman: Judith Mudzengi

Subject: New cement products

Information: New cement products

Value: 150000.0000

Case Type:

Source Type: Referral

Case Date: 23 Aug 2019

Expected Completion: 30 Aug 2019

Attachments:

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

Build Construction - BU10001

Case State

Case State: Cold Call (10%)

Percentage: 10%

Activity

Type: Phone call

Address: 3 Colinton Road Gillits Upper Highway KZN

Subject: Market new products

Comments: Market new products

Activity Attendees

Attendees

Judith Mudzengi

Clare Zodwa

John Holland

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

Send Email Invites

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

Schedule

Date: 23 Aug 2019

from: 15:00 to: 15:30

Reminder: Email ☐ SMS ☐ 30 minutes before scheduled start

Quote

Save

- A message box will pop up asking you;
 - ***Are you sure you want to remove this attendee from the activity?***
- Click on **Ok**.

CRM BPO2 Test Environment

192.168.100.150:60005 says
Are you sure you want to remove this attendee from the activity?

Judith Mudzengi

Save Activity

Case

Customer Build Construction

Contact Clere Zodwa

Salesman Judith Mudzengi

Subject New cement products

Information New cement products

Value 150000.0000

Case Type CRMCNEWS

Case Date 23 Aug 2019

Source Type Referral

Expected Completion 30 Aug 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

Build Construction - BU0001

Case State

Case State Cold Call (10%)

Percentage 10%

Activity

Type Phone call

Address 3 Colinton Road Gillits Upper Highway KZN

Subject Market new products

Comments Market new products

Activity Attendees

Attendees

Judith Mudzengi

Clere Zodwa

John Holland

Page 1 of 1 (3 items)

Send Email Invites

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

Schedule

Date 22 Aug 2019 from 15:00 to 15:30

Reminder Email SMS 30 minutes before scheduled start

Quote

Save

- The attendee will be removed from the **Activity Attendee** section.

CRM BPO2 Test Environment

Judith Mudzengi

Save Activity

Case

Customer Build Construction

Contact Clere Zodwa

Salesman Judith Mudzengi

Subject New cement products

Information New cement products

Value 150000.0000

Case Type CRMCNEWS

Case Date 23 Aug 2019

Source Type Referral

Expected Completion 30 Aug 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

Build Construction - BU0001

Case State

Case State Cold Call (10%)

Percentage 10%

Activity

Type Phone call

Address 3 Colinton Road Gillits Upper Highway KZN

Subject Market new products

Comments Market new products

Activity Attendees

Attendees

Judith Mudzengi

Clere Zodwa

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 Aug 2019 from 15:00 to 15:30

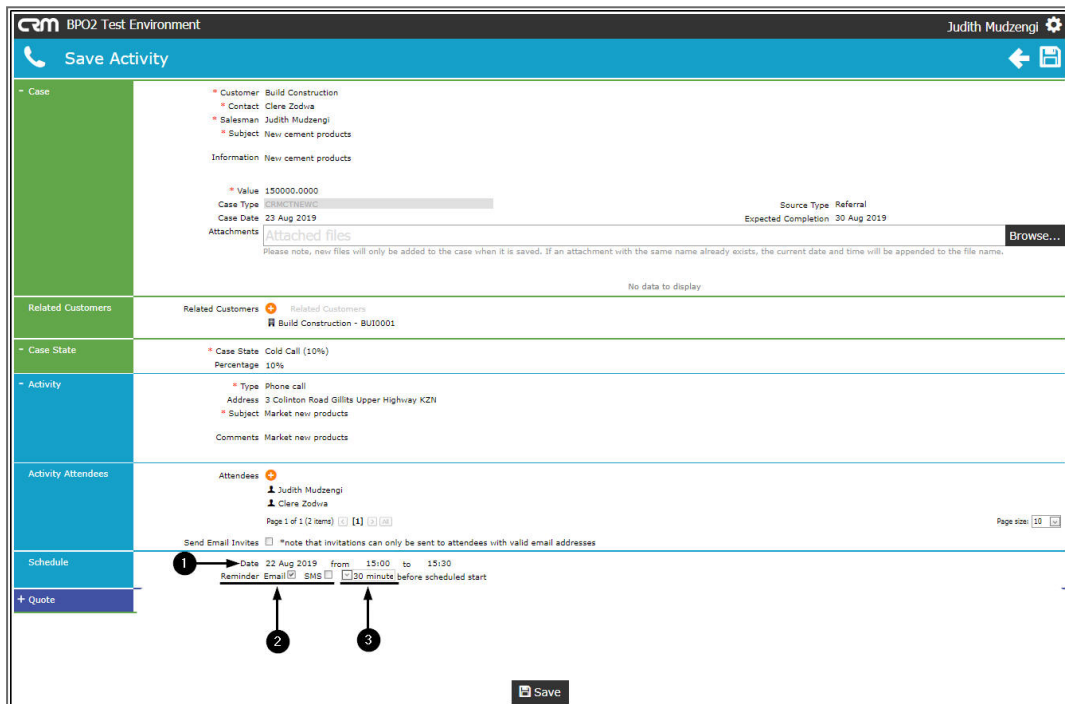
Reminder Email SMS 30 minutes before scheduled start

Quote

Save

Scheduling

1. **Date** : You can change the **scheduled date** and or the **time** if applicable.
2. **Reminder** : Select either Email or SMS by ticking the relevant check box if applicable.
3. **Reminder (Time Period)** : Hover over the field, a **down arrow** will be displayed. Click on the **down arrow** and select the relevant time period from the **drop-down menu** if applicable.



CRM BPO2 Test Environment Judith Mudzengi

Save Activity

Case

- Customer: Build Construction
- Contact: Clere Zodia
- Salesman: Judith Mudzengi
- Subject: New cement products
- Information: New cement products
- Value: 150000.0000
- Case Type: CRMCTNEWC
- Source Type: Referral
- Case Date: 23 Aug 2019
- Expected Completion: 30 Aug 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: Build Construction - BU10001

Case State

Case State: Cold Call (10%)
Percentage: 10%

Activity

Type: Phone call
Address: 3 Colinton Road Gills Upper Highway KZN
Subject: Market new products
Comments: Market new products

Activity Attendees

Attendees: Judith Mudzengi, Clere Zodia
Page 1 of 1 (2 items) [1](#) [2](#)

Schedule

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

Date: 22 Aug 2019 from 15:00 to 15:30
Reminder: Email ☐ SMS ☐ 30 minute before scheduled start

Quote

[Save](#)

Quote Details

- You can **edit** quote details if applicable.

Save Changes

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

CRM BPO2 Test Environment Judith Mudzengi

Save Activity

Case Subject: New cement products

Case State Cold Call (10%)
Percentage: 10%

Activity Type: Phone call
Address: 3 Colinton Road Gillits Upper Highway KZN
Subject: Market new products
Comments: Market new products

Activity Attendees Attendees: Judith Mudzengi, Clere Zodwa
Page 1 of 1 (2 items)

Schedule Date: 22 Aug 2019 from 15:00 to 15:30
Reminder: Email SMS 30 minutes before scheduled start

Quote A quote will only be created if you add quote line items.
Quote settings: ☒ Create customer defaults
Quote Contact: Clere Zodwa
Quote Reference:
Reference: Quote
Comments: Quote
Date: 27 Aug 2019
Site: London
Print Layout: SALESQUOTE

Quote Financials Currency: South African Rand
Tax Rate: 15.00
Exchange Rate: 10.0000
Quote Terms: Cash on Delivery
Commercial: Default

Add Quote Items Add Item Type to find items...

Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
1	INVN	ZHS08110	ACTUATOR MPP	1	0.00	0.00	0.00	1131.78		1131.78		1301.54	
2	INVN	FS-1018MPP	FS 1018MPP	1	0.00	0.00	0.00	1857.96	726.18	2584.14		2136.65	

1 → Save

- You will return to the **My Activities** screen.

CRM BPO2 Test Environment Judith Mudzengi

My Activities

Schedule Date Status

Meeting - Hope Works: Meeting
When: 22 Aug 2019, 16:00-17:00
Who: John Smith, Hope Works
Tel: 031 123 4567
Email: john@email.co.za
Cell: 031 123 4567

Phone call - Build Construction: Market new products
When: 22 Aug 2019, 15:00-15:30
Who: Clere Zodwa, Build Construction
Tel: 031 456 798
Email: clere@noemail.com
Cell: 060 251 451
Bus: 031 456 789

Site Inspection - Hope Works: contract signing
When: 19 Aug 2019, 11:00-12:00
Who: John Smith, Hope Works
Tel: 031 123 4567
Email: john@email.co.za
Cell: 031 123 4567

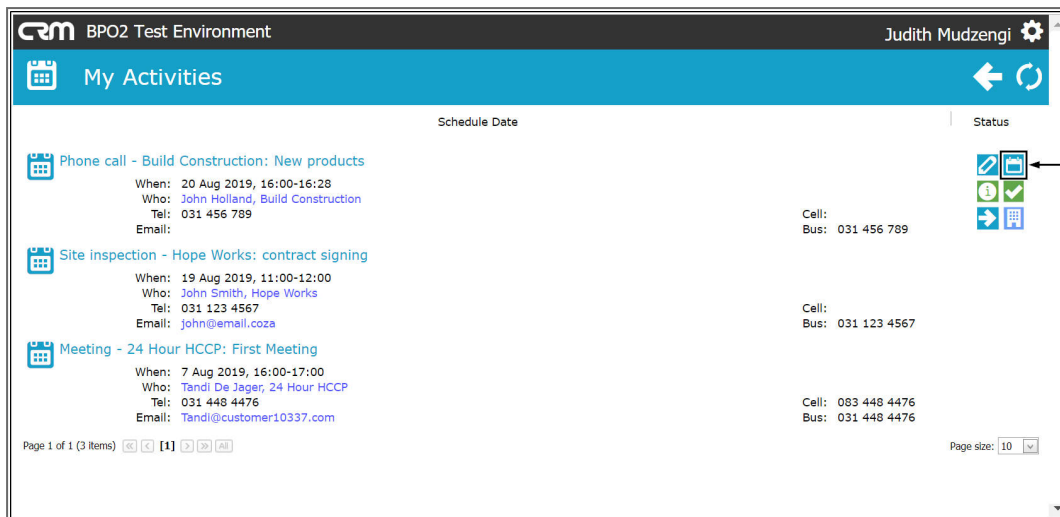
Meeting - 24 Hour HCCP: First Meeting
When: 7 Aug 2019, 16:00-17:00
Who: Tandi De Jager, 24 Hour HCCP
Tel: 031 448 4476
Email: Tandi@customer10337.com
Cell: 083 448 4476
Bus: 031 448 4476

Page 1 of 1 (4 items) [1] [2] [3] [4]

Page size: 10

RESCHEDULE AN ACTIVITY

- Click on the **Reschedule this Activity** icon.



CRM BPO2 Test Environment Judith Mudzengi

My Activities

Schedule Date

Status

- Phone call - Build Construction: New products**
 - When: 20 Aug 2019, 16:00-16:28
 - Who: John Holland, Build Construction
 - Tel: 031 456 789
 - Email:
 - Cell: 031 456 789
 - Bus: 031 456 789
- Site inspection - Hope Works: contract signing**
 - When: 19 Aug 2019, 11:00-12:00
 - Who: John Smith, Hope Works
 - Tel: 031 123 4567
 - Email: john@email.co.za
 - Cell: 031 123 4567
 - Bus: 031 123 4567
- Meeting - 24 Hour HCCP: First Meeting**
 - When: 7 Aug 2019, 16:00-17:00
 - Who: Tandi De Jager, 24 Hour HCCP
 - Tel: 031 448 4476
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 - Bus: 031 448 4476

Page 1 of 1 (3 items) [1] [2] [3] [4] [5] [6] [7] [8] [9] [10] [11] [12] [13] [14] [15] [16] [17] [18] [19] [20] [21] [22] [23] [24] [25] [26] [27] [28] [29] [30] [31] [32] [33] [34] [35] [36] [37] [38] [39] [40] [41] [42] [43] [44] [45] [46] [47] [48] [49] [50] [51] [52] [53] [54] [55] [56] [57] [58] [59] [60] [61] [62] [63] [64] [65] [66] [67] [68] [69] [70] [71] [72] [73] [74] [75] [76] [77] [78] [79] [80] [81] [82] [83] [84] [85] [86] [87] [88] [89] [90] [91] [92] [93] [94] [95] [96] [97] [98] [99] [100] [101] [102] [103] [104] [105] [106] [107] [108] [109] [110] [111] [112] [113] [114] [115] [116] [117] [118] [119] [120] [121] [122] [123] [124] [125] [126] [127] [128] [129] [130] [131] [132] [133] [134] [135] [136] [137] [138] [139] [140] [141] [142] [143] [144] [145] [146] [147] [148] [149] [150] [151] [152] [153] [154] [155] [156] [157] [158] [159] [160] [161] [162] [163] [164] [165] [166] [167] [168] [169] [170] [171] [172] [173] [174] [175] [176] [177] [178] [179] [180] [181] 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BPO2 Test Environment

Judith Mudzengi



Save Activity



+ Case	Subject New products
- Case State	* Case State Distant prospect - on hold (5%) Percentage 5%
- Activity	* Type Phone call Address 23 Roldock Road Upper Highway Gillits Durban KZN * Subject New products Comments New products
Activity Attendees	Attendees  Judith Mudzengi John Holland Page 1 of 1 (2 items)  [1]   Send Email Invites ☐ *note that invitations can only be sent to attendees with valid email addresses
Schedule	2 Date 20 Aug 2019 from 16:00 to 16:28 3 1 Reminder Email ☒ SMS ☐ 30 minutes before scheduled start
+ Quote	

 Save

Adjust the Date

1. Hover over the **Date** field, a **down arrow** will be displayed. Click on this **arrow**.


BPO2 Test Environment

Judith Mudzengi



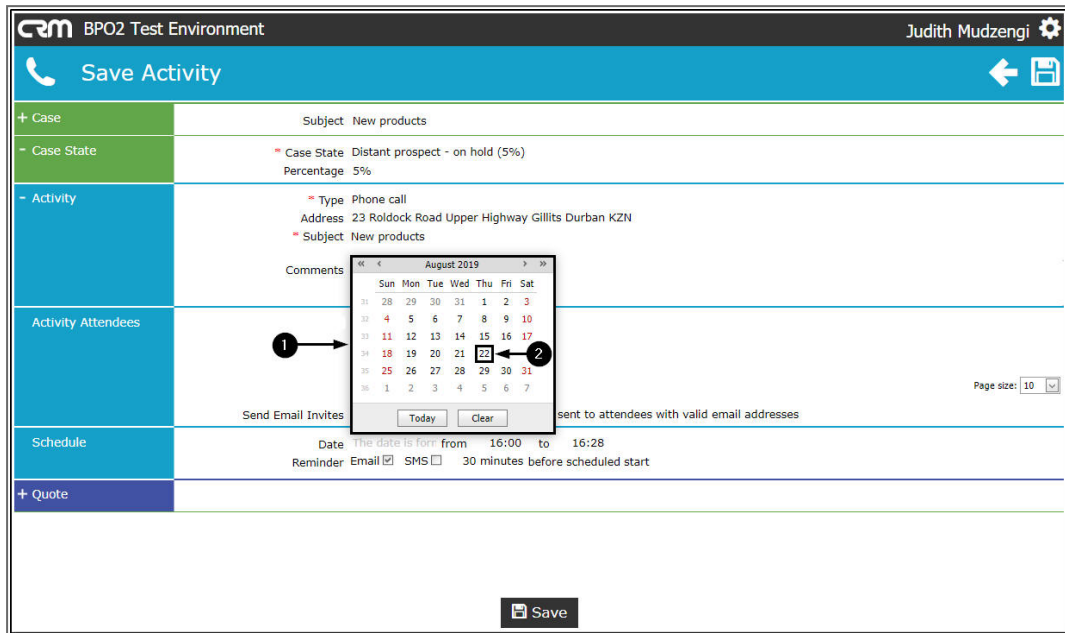
Save Activity



+ Case	Subject New products
- Case State	* Case State Distant prospect - on hold (5%) Percentage 5%
- Activity	* Type Phone call Address 23 Roldock Road Upper Highway Gillits Durban KZN * Subject New products Comments New products
Activity Attendees	Attendees  Judith Mudzengi John Holland Page 1 of 1 (2 items)  [1]   Send Email Invites ☐ *note that invitations can only be sent to attendees with valid email addresses
Schedule	Date  20 Aug 2019 from 16:00 to 16:28
+ Quote	

 Save

1. A **calendar** will pop up.
2. Select the relevant date.



CRM BPO2 Test Environment Judith Mudzengi

Save Activity

+ Case Subject New products

- Case State * Case State Distant prospect - on hold (5%)
Percentage 5%

- Activity * Type Phone call
Address 23 Roldock Road Upper Highway Gillits Durban KZN
* Subject New products

Comments

Activity Attendees

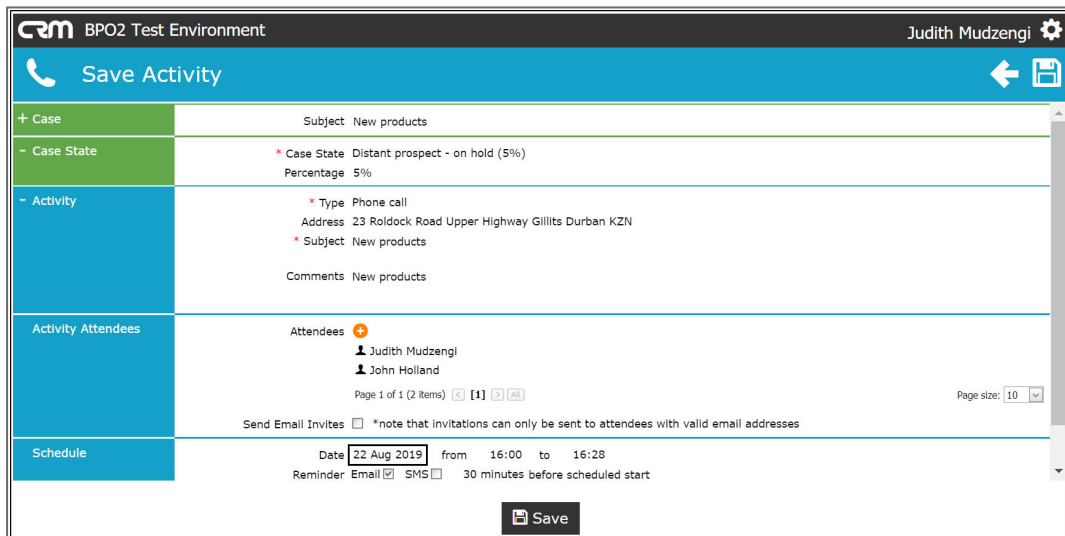
Send Email Invites Today Clear sent to attendees with valid email addresses

Schedule Date The date is from from 16:00 to 16:28
Reminder Email ☒ SMS ☐ 30 minutes before scheduled start

+ Quote

Save

- The **Date** field will now be populated with the selected date.



CRM BPO2 Test Environment Judith Mudzengi

Save Activity

+ Case Subject New products

- Case State * Case State Distant prospect - on hold (5%)
Percentage 5%

- Activity * Type Phone call
Address 23 Roldock Road Upper Highway Gillits Durban KZN
* Subject New products

Comments New products

Activity Attendees

Attendees +
Judith Mudzengi
John Holland
Page 1 of 1 (2 items) [1] [All]

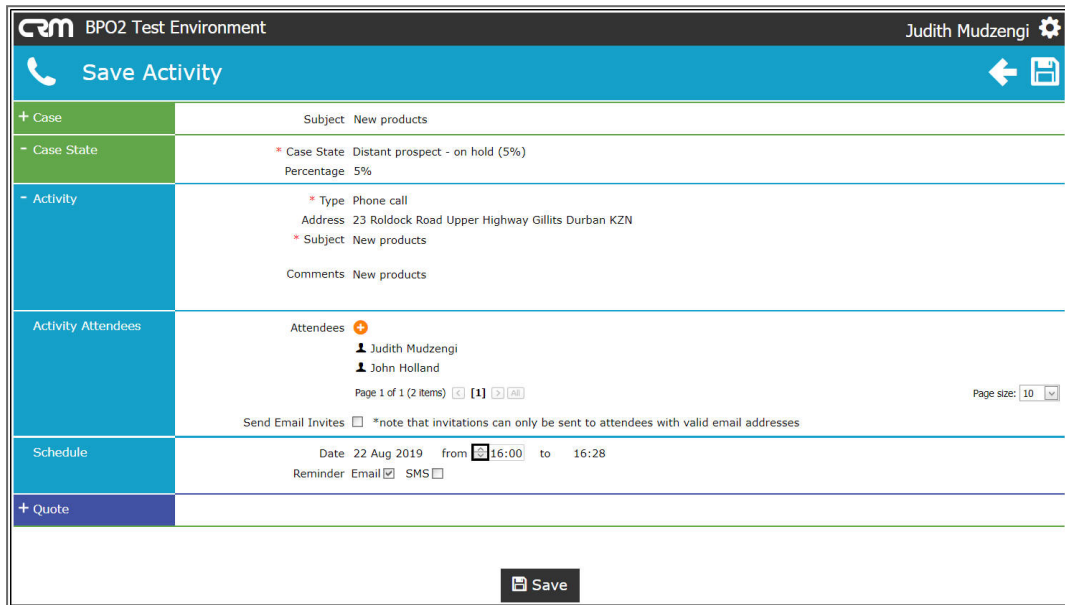
Send Email Invites ☐ *note that invitations can only be sent to attendees with valid email addresses

Schedule Date 22 Aug 2019 from 16:00 to 16:28
Reminder Email ☒ SMS ☐ 30 minutes before scheduled start

Save

Adjust the Time

- **From:** Either hover over the field and click on the **directional arrows** to adjust the time or
- type in the relevant time.



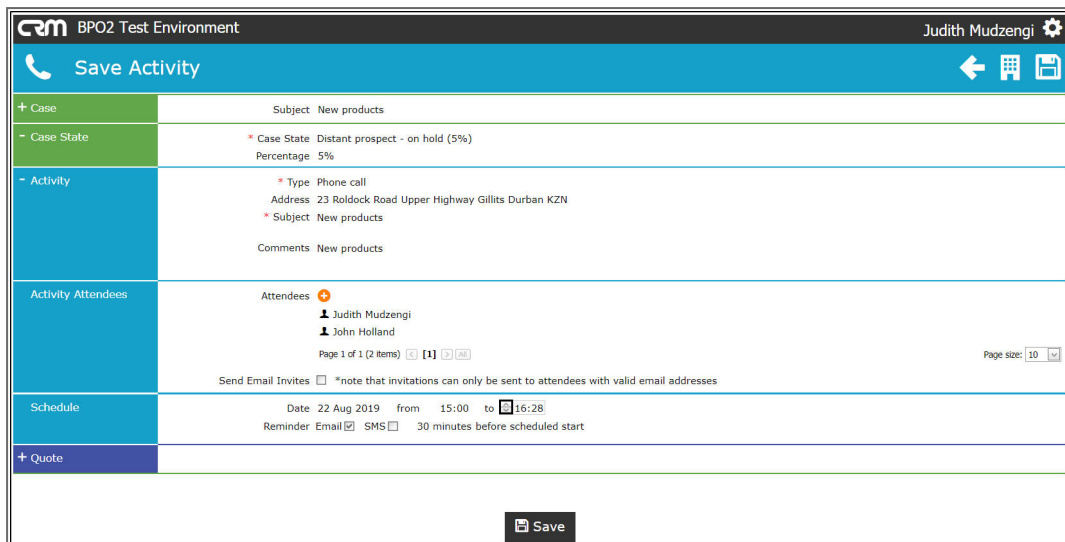
CRM BPO2 Test Environment Judith Mudzengi

Save Activity

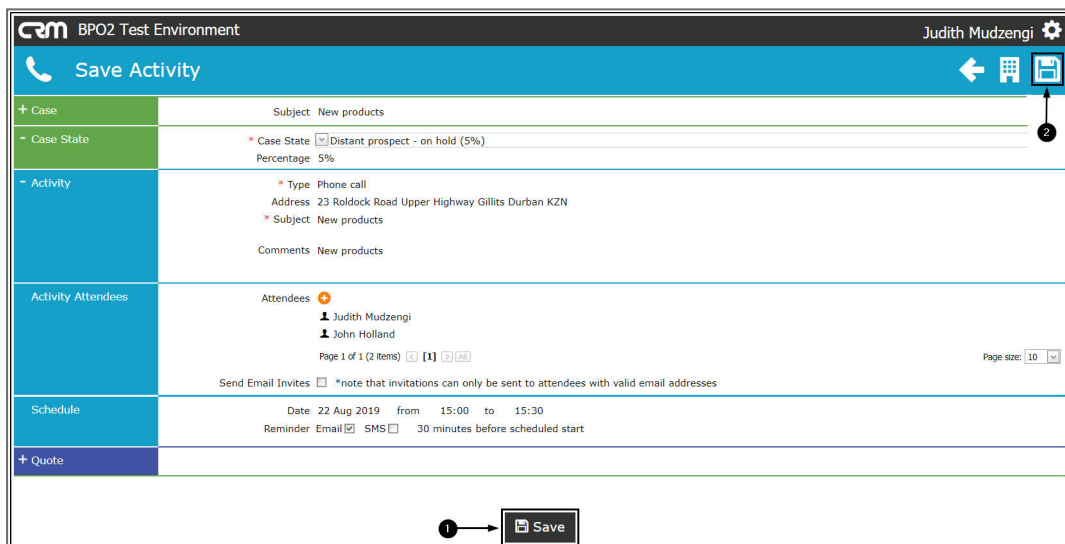
+ Case	Subject: New products
- Case State	* Case State: Distant prospect - on hold (5%) Percentage: 5%
- Activity	* Type: Phone call Address: 23 Roldock Road Upper Highway Gillits Durban KZN * Subject: New products Comments: New products
Activity Attendees	Attendees + Judith Mudzengi John Holland Page 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	Date: 22 Aug 2019 from 16:00 to 16:28 Reminder Email ☒ SMS ☐
+ Quote	

Save

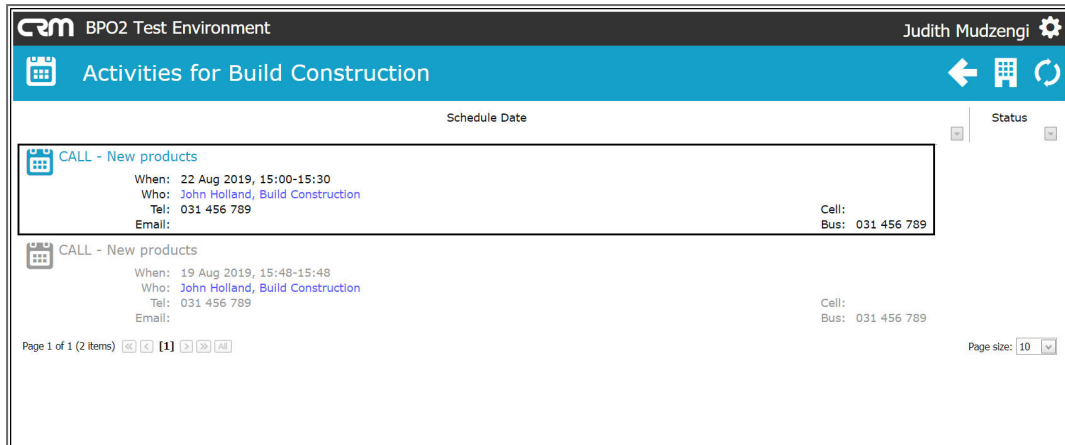
- **To :** Either hover over the field and click on the **up and down arrows** to adjust the time or
- type in the relevant time.



- Click on either the **Save** button or
- **Save** icon.



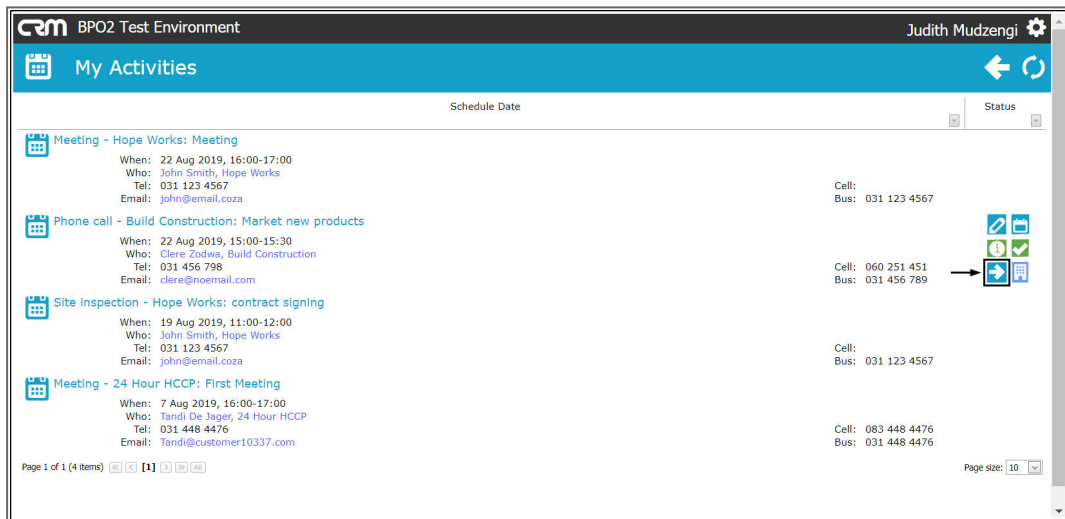
- The **Activities for []** screen will be displayed.
- The rescheduled activity will be displayed in this screen.



NEXT ACTION

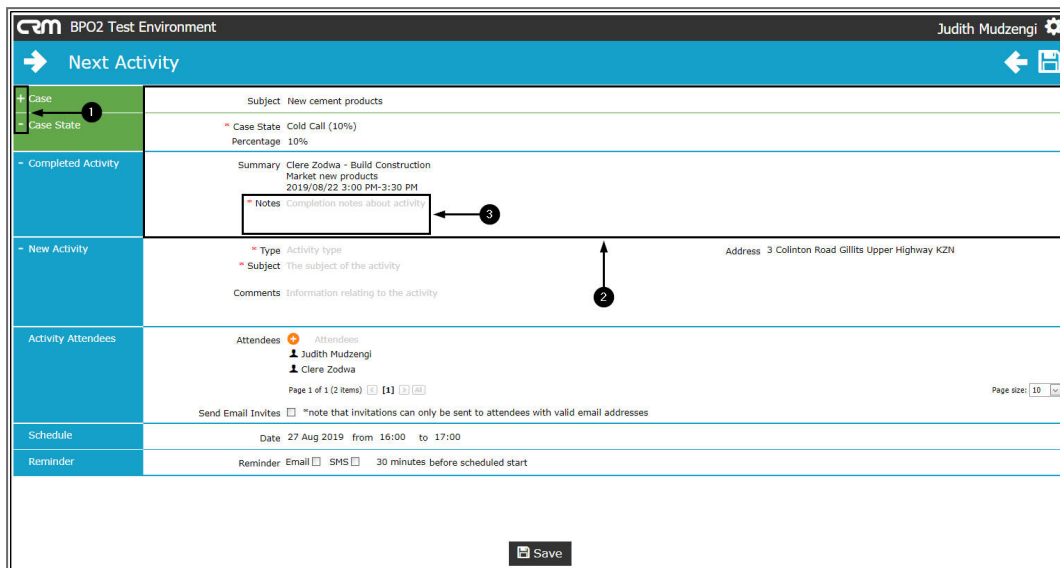
This allows you to close a current activity and create a new activity.

- Click on the **Next Action** icon.



- The **Next Activity** screen will be displayed.
 1. Click on the ' + ' sign to view more details or click on the ' - ' sign to view less details.
 2. The current case / activity details will auto populate but you can edit the details if you wish to.

3. Type in the relevant **completion notes** of the current activity.



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Next Activity

Case Subject New cement products

Case State Case State Cold Call (10%) Percentage 10%

Completed Activity Summary Clere Zodwa - Build Construction Market new products 2019/08/22 3:00 PM-3:30 PM Notes Completion notes about activity

New Activity Type activity type Subject The subject of the activity Address 3 Colinton Road Gillits Upper Highway KZN Comments information relating to the activity

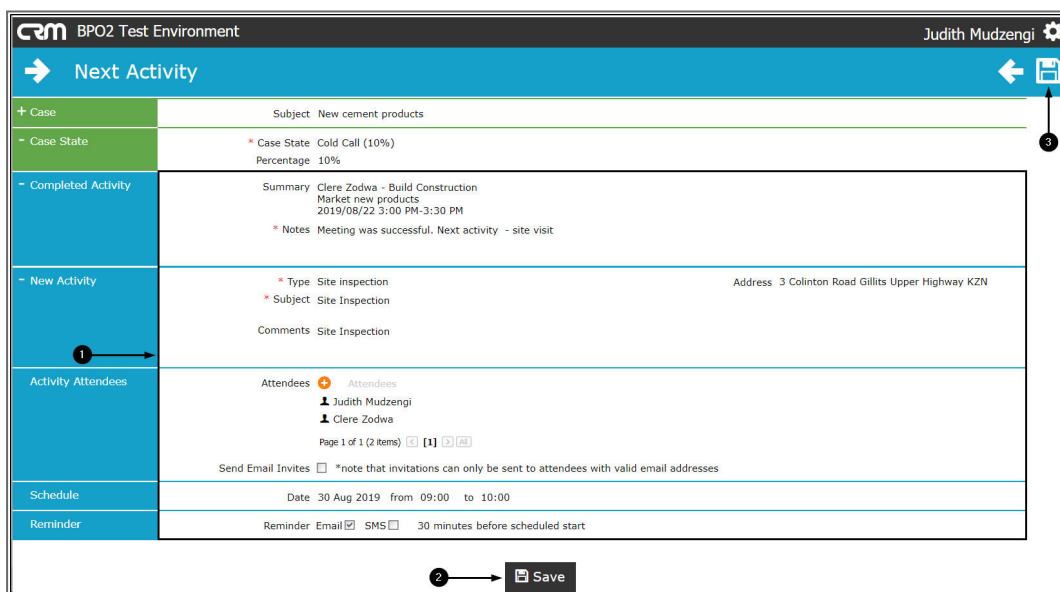
Activity Attendees Attendees Attendees Judith Mudzengi Clere Zodwa Page 1 of 1 (2 items) [1] [2] [3] Send Email Invites ☐ *note that invitations can only be sent to attendees with valid email addresses

Schedule Date 27 Aug 2019 from 16:00 to 17:00

Reminder Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

Save

1. **Update** the new activity information.
2. Click on either the **Save** button or
3. **Save** icon.



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Next Activity

Case Subject New cement products

Case State Case State Cold Call (10%) Percentage 10%

Completed Activity Summary Clere Zodwa - Build Construction Market new products 2019/08/22 3:00 PM-3:30 PM Notes Meeting was successful. Next activity - site visit

New Activity Type Site inspection Address 3 Colinton Road Gillits Upper Highway KZN Subject Site Inspection Comments Site Inspection

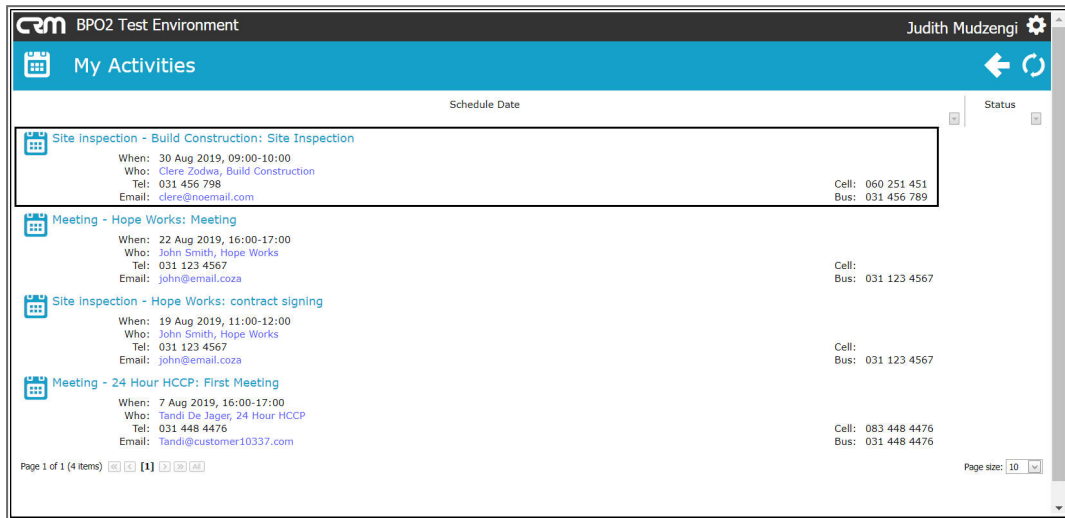
Activity Attendees Attendees Attendees Judith Mudzengi Clere Zodwa Page 1 of 1 (2 items) [1] [2] [3] Send Email Invites ☐ *note that invitations can only be sent to attendees with valid email addresses

Schedule Date 30 Aug 2019 from 09:00 to 10:00

Reminder Reminder Email ☒ SMS ☐ 30 minutes before scheduled start

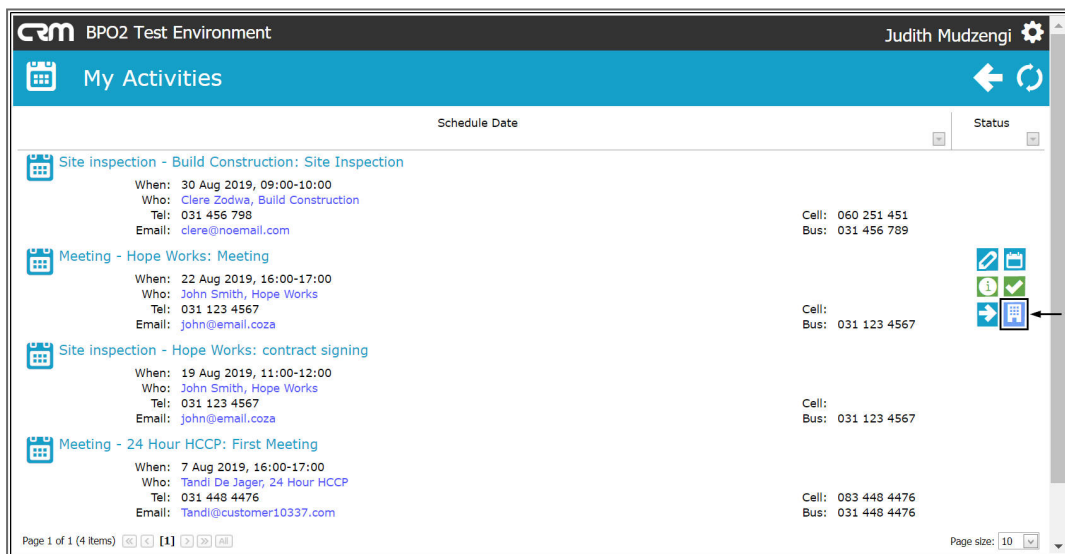
Save

- The **My Activities** screen will be displayed.
- The completed activity will be removed from this screen.
- The new activity will be displayed in this screen.

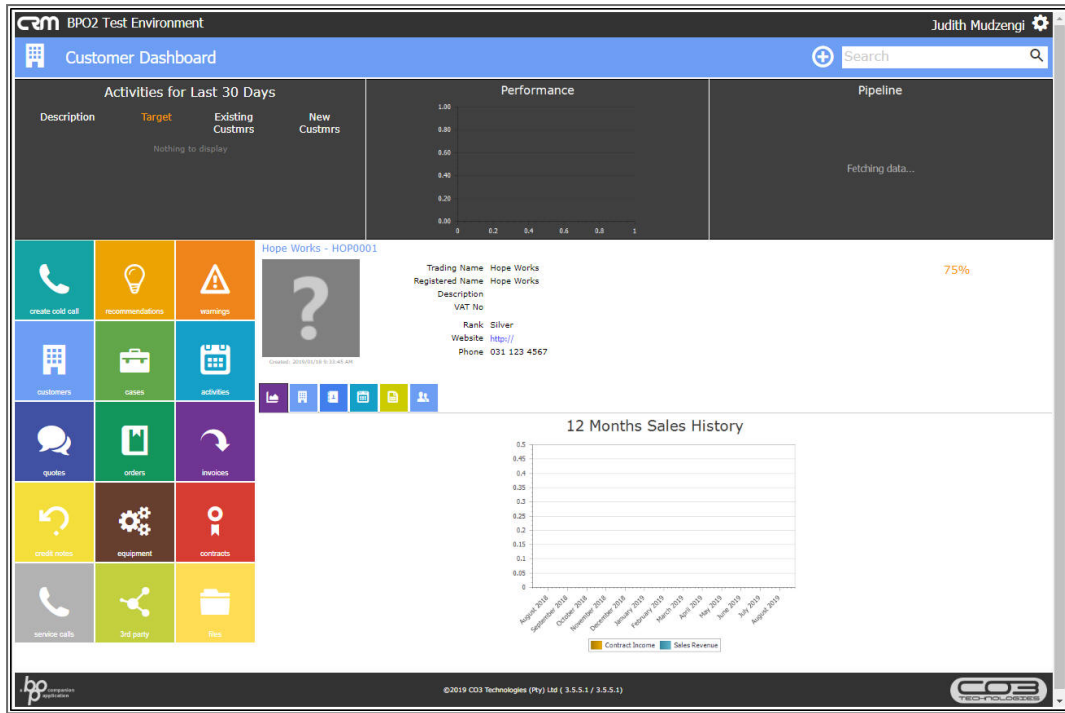


VIEW CUSTOMER

- Click on the **View Customer** icon.



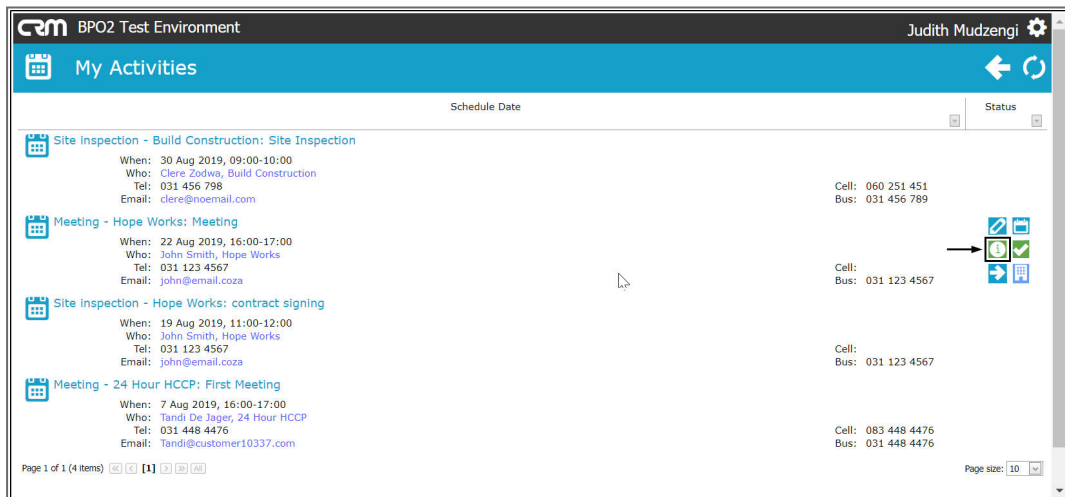
- The **Customer Dashboard** will be displayed.
- You can now view the selected customer's details.



OTHER ACTION ITEMS

You can also

- View Case Info and History



and

- Close a Case.


BPO2 Test Environment

Judith Mudzengi



My Activities




Schedule Date


Status


 Site Inspection - Build Construction: Site Inspection When: 30 Aug 2019, 09:00-10:00 Who: Clere Zodwa, Build Construction Tel: 031 456 798 Email: clere@noemail.com	Cell: 060 251 451 Bus: 031 456 789
 Meeting - Hope Works: Meeting When: 22 Aug 2019, 16:00-17:00 Who: John Smith, Hope Works Tel: 031 123 4567 Email: john@email.co.za	Cell: 031 123 4567 Bus: 031 123 4567
 Site Inspection - Hope Works: contract signing When: 19 Aug 2019, 11:00-12:00 Who: John Smith, Hope Works Tel: 031 123 4567 Email: john@email.co.za	Cell: 031 123 4567 Bus: 031 123 4567
 Meeting - 24 Hour HCCP: First Meeting When: 7 Aug 2019, 16:00-17:00 Who: Tandi De Jager, 24 Hour HCCP Tel: 031 448 4476 Email: Tandi@customer10337.com	Cell: 083 448 4476 Bus: 031 448 4476

Page 1 of 1 (4 items)



1

Page size: 10


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