

# **CRM BASICS**

## COLD CALL

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

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

## ACCESS COLD CALLS FROM CUSTOMER DASHBOARD

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



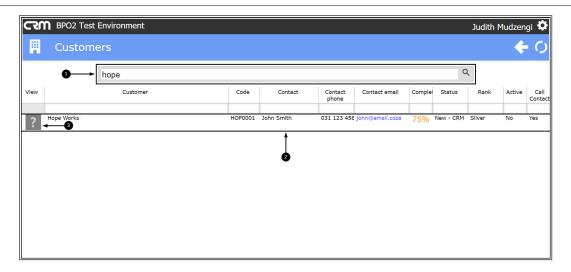
CCM BPO2 Test Environment		Judith Mudzengi 🍄 🏠
🖾 Dashboard		Search Q
Dashboard Description Parget Existing Custmrs Nothing to display 17 Jan 2019 0	New         0.40           Custmms         0.50           0.60         0.40           0.20         0.00           0.00         0.2         0.4           7         Today         Recent:	Fetching data
Control     Control	Image: Schedule Date       Image: Phone call - Hope Works: Advertise products       When: 10 Sep 2019, 15:00-16:00       Who: John Smith, Hope Works       Tel: 031123 4567       Email: John@email.coza       Image: Phone Works: Meeting       When: 9 Sep 2019, 15:00-16:00       Who: John Smith, Hope Works       Tel: 031123 4567       Email: john@email.coza       Page 1 of 1 (2 terms) @ c [1] > D m M	Cell: Bus: 031 123 4567 Cell: Bus: 031 123 4567 Page size: 10 v
quotes	@2019 CO3 Technologies (Phy) Ltd ( 3.5.5.1 / 3.5.5.1)	

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

	BPO2 Test Environment							Judith	Mudzer	igi 🌣
Ħ	Customers								÷	- O
	Type Customer name search filter here						٩			
View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
?	24 Hour HCCP	71509643	Another Person	345678		50%	New - CRM	Diamond	No	Yes
?	3Rd Generation Client-Server	71505527	Abigail Milne	031 234 567	abi@noname.com	75%	New - CRM		No	Yes
?	43305 Scalable	71505435				25%	Active		Yes	No
?	Adapter Holistic	71505360				25%	New - CRM		No	No
?	Adult Education Zope	71505302				25%	New - CRM		No	No
?	Advanced Feedmix	71505323				25%	New - CRM		No	No
?	Advanced Kimmel	71505324				25%	New - CRM		No	No
?	Aerospace Engineering Kubuntu	71505310				25%	New - CRM		No	No
?	Aimbu Yoveo	71505346				25%	New - CRM		No	No
?	Alliance IAR Embedded Workbench	71505341				25%	Active		Yes	No
age 1 of	29 (266 items) [ [1] 2 2 4 5 6 7 27 28 29 3 A								Page size	s: 10 🖂

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





The *Customer Dashboard* screen will be displayed.

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

The Create Cold Call screen will be displayed.

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



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

## **ACCESS COLD CALLS FROM THE DASHBOARD**

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

The *Create Cold Call* screen will be displayed.



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

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

## **CREATE COLD CALL FOR NEW CUSTOMER**

#### **Customer F rame**

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



	nvironment	Judith Mudzengi 🕻
📞 Create Co	old Call 🥠	← 🗄
- Customer + Salesmen - Contact + Address	Customer IR R     Kanne Repidered Name Treding Name Status     Forpe The Customer Type     Reg. No 7530149 384 Generation Napidit 384 Generation Alpoints N     Reg. No 7530149 384 Generation Napidit 384 Generation Alpoints N     Subscription 12547373 844 Generation Napidit 384 Generation Napidit N     TSIS01273 844 Generation National 384 Generation Name N     Subscription 12557373 844 Generation Name N     Subscription 1255731 844 Generation Subscription Name N     Telephone 7557739 444 Generation Subsfill 41 Constraints Subscription Name N     Telephone 7557739 444 Generation Subsfill 41 Constraints Subsfill 41 Cons	
- Case	* Subject: The subject of the case Information: Additional information relating to the case * Value 0 Case Type: The type of Case Source Type: The type of source	
+ Related Customers		
- Next Activity	<ul> <li>Salesman Salesman assigned to this customer</li> <li>Type Type of activity</li> <li>Subject. The subject of the activity</li> <li>Comments. Additional information relating to the activity</li> </ul>	
+ Activity Attendees		
- Schedule	When 11 Sep 2019 from 11:00 to 12:00 Reminder Email□ SMS□ 30 minutes before scheduled start	
	Show customer after save 🗑	

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

CCM BPO2 Test E	nvironment	Judith Mudzengi 🌣
📞 Create C	old Call	🔶 🗎
- Customer	<ul> <li>Customer Riverside Investments</li> <li>"Rank: Select customer's rank Reg. No Registration number</li> </ul>	▲ Type The customer type VAT No VAT number
+ Salesmen		
- Contact	<ul> <li>Full name Contact's full name</li> <li>Telephone Contact's telephone number</li> </ul>	Email Email address
+ Address		
- Case	<b>Subject</b> The subject of the case Information Additional information relating to the case	
	← Value 0 Case Type of Case	Source Type The type of source
+ Related Customers		
- Next Activity	<ul> <li>Salesman Judith Mudzengi</li> <li>Type Type of activity</li> <li>Subject The subject of the activity</li> <li>Comments Additional information relating to the activity</li> </ul>	
+ Activity Attendees		
- Schedule	When 11 Sep 2019 from 12:00 to 13:00 Reminder Email 🗌 SMS 🗌 30 minutes before scheduled start	
Submit Options	Show customer after save 🕑	
	🖺 Save	



#### Salesmen Frame

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

CCM BPO2 Test	t Environment		Judith Mudzengi
📞 Create	Cold Call		🔶 🕻
- Customer	Customer Riverside Investment Rank Diamond (5 days) Reg. No 789065	5	* Type Construction VAT No 908734637
- Salesmen	Abigai Milna Adie Weder Alex Spangenbrg Almeri Tacay Andromache Joselevitch Angle Roseboreuph Armando Reichelt Ary Huein	Chris Haynes OGA Admin Colin Holden Datens Pillay Darry Muller Debbis Lugar Edwell Waskyna	Judéh Mudangi Kabuhira Niryhin Kessia Matland Kim Engelbrecht Lucky Maruye Malory Allbon Marc Repeld Marc Repeld
- Contact	<ul> <li>Full name Contact's full name</li> <li>Telephone Contact's telephone n</li> </ul>	umber	Email Email address
+ Address			
- Case	* Subject The subject of the ca Information Additional information		
	* Value 0 Case Type Type of Case		Source Type The type of source
+ Related Customers			
- Next Activity	<ul> <li>Salesman Judith Mudzengi</li> <li>Type Type of activity</li> <li>Subject The subject of the act</li> <li>Comments Additional information</li> </ul>		
+ Activity Attendees			
- Schedule	When 11 Sep 2019 from Reminder Email SMS 3	12:00 to 13:00 30 minutes before scheduled start	
Submit Options	Show customer after save 🕑		
		🛱 Save	

#### **Contact Frame**

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



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

#### **Address Frame**

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



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

#### Case Frame

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



CTM BPO2 Test	Environment			Judith Mudzengi 🌣
📞 Create (	Cold Call			🔶 🚍
	<ul> <li>Customer: Riverside Investments</li> <li>Rank: Diamond (5 days)</li> <li>Reg. No: 789065</li> </ul>		<ul> <li>Type Construction</li> <li>VAT No 908754637</li> </ul>	
- Salesmen	Abigail Milne     dele Weeden     dele Weeden     des Segentrag     Andromache Joselevich     Andromache Joselevich     Andromache Joselevich     Armando Reichelt     Arv Healen	Chris Haynes CO3 Admin Colin Holden Dalene Pillay Darryl Muller Debble Lugar Derrick Weeder Edrrick Weeder Edrick Weakva	Judith Mudzengi     Kashnina Kinghi     Kashnina Kinghin     Kashnina Kinghin     Kashnina Kinghin     Kashnina Kinghin     Kashnina Kinghin     Mara Reasold     Mara Reasold	
- Contact	* Full name Joel Reeds * Telephone 031 210 455		Email joelreeds@email.com	
- Address	Existing New Address Line 1: 2 Selby Court Address Line 2: 7 Coulton Rd Suburb Gillits City Durban Province/State KZN Post Code 4000 Country RSA			
- Case	• Subject The subject of the case. Information Additional information relating to the	5 case		←
	* Value 0 Case Type of Case		Source Type The type of source	
+ Related Customers				
- Next Activity	* Salesman Judith Mudzengi * Type Type of activity * Subject The subject of the activity Comments Additional information relating to the	activity		
+ Activity Attendees				
- Schedule	When 11 Sep 2019 from 12:00 to Reminder Email SMS 30 minutes bef			
Submit Options	Show customer after save 🕑			
		🖪 Save		

#### **Related Customer Frame**

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

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

#### Add Related Customer

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



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

#### **Delete Related Customer**

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



CCM BPO2 Test I	Environment				Judith Mudzengi 🌣
📞 Create C	old Call				🔶 🗎
- Customer		Riverside Investments Diamond (5 days) 789065		* Type Construction VAT No 908754637	
- Salesmen	Abigail Milne     Adele Weeder     Alex Spangenberg     Almeria Teacy     Andromache Josebevitch     Angie Roseborough     Armando Reichelt     Anz Uselin		Chris Haynes CO3 Admin Colin Holden Darnyl Muller Derrick Weeder Edual Mentues	Judith Mudzengi     Kashmira Nirghin     Kessi Maitland     Kim Engelsrecht     Lucky Marvuye     Malory Allibon     Marc Repsold	, ,
- Contact	* Full name * Telephone			Email joelreeds@email.com	
- Address	Existing Address Line 1 Address Line 2 Suburb City Province/State Post Code Country	12 Selby Court 7 Colinton Rd Gillits Durban KZN 4000			
- Case	Information * Value				
- Related Customers	and a second	New Customer O Hope Works; HOP0001 H Hope Works - HOP0001		Source Type Referral	3-→□
- Next Activity	* Type * Subject	Judith Mudzengi Type of activity The subject of the activity Additional information relating	g to the activity		<u> </u>
+ Activity Attendees					
- Schedule		11 Sep 2019 from 16:0 Email SMS 30 minut	00 to 17:00 tes before scheduled start		
Submit Options	Show customer after save	2			
			🖹 Save		

### **Next Activity Frame**

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



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

CCM BPO2 Test E	invironment			Judith Mudzengi 🌣
📞 Create C	old Call			🔶 🗎
- Customer		Riverside Investments Diamond (5 days) 789065	* Type Construction VAT No 908754637	
- Salesmen	Abigail Milne     Adele Weeder     Alex Spangenberg     Alex Spangenberg     Almeria Teacy     Andromache Joselevitch     Angie Roseborough     Armando Reichelt     Arv Huelin	Chris Haynes Col Admin Colin Holden Datene Pillay Darryl Muller Debbic Live Kleeder Edwell Maskva	Judith Mudzangi     Kashmira Nirghin     Kesia Matthad     Kim Engalbracht     Lucky Mairivge     Malory Alliban     Markar Respold     Markus Engalbracht	×
- Contact	* Full name * Telephone		Email joelreeds@email.com	
- Address	Existing Address Line 1 Address Line 2 Suburb City Province/State Post Code Country	12 Selby Court 7 Colinton Rd Gillita Durban KZN 4000		
- Case		Market New Products Market New Products 200000		
- Related Customers		New Customer O Hope Works: HOP0001 II Hope Works - HOP0001	Source Type Referral	
- Next Activity	* Type * Subject	Judith Mudzengi Type of activity The subject of the activity Additional information relating to the activity	-	
+ Activity Attendees				
- Schedule		12 Sep 2019 from 11:00 to 12:00 Email 🗌 SMS 🗌 30 minutes before scheduled start		
Submit Options	Show customer after save	V		
		🖺 Save		

## Activity Attendees Frame

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

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



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

CCM BPO2 Test	Environment				Judith Mudzengi 🌣
📞 Create C	Cold Call				🔶 🗎
- Customer	* Rank	Riverside Investments Diamond (5 days) 789065		* Type Construction VAT No 908754637	
- Salesmen	Abigail Milne     Adele Weeder     Alex Spangenberg     Almeria Teacy     Angie Roseborough     Armado Reichelt     Ary Huelin	(	Chris Haynes 9 C03 Admin Celin Holdan Dalene Pilley Darryl Moller Debbie Lugar Debbie Lugar Debbie Lugar	Judith Mudsengi     Kahnnira Nivojinin     Kahnnira Nivojinin     Kohnnira Nivojinin     Kon Engelbrecht     Lucky Maxviye     Malor     Marc Repsold     Marc Repsold	•
- Contact	* Full name * Telephone	Joel Reeds 031 210 455		Email joelreeds@email.com	
- Address	Address Line 2 Suburb	12 Selby Court 7 Colinton Rd Gillits Durban KZN 4000			
- Case		Market New Products Market New Products			
		200000 New Customer		Source Type Referral	
- Related Customers	Related Customers	O Hope Works; HOP0001 ■ Hope Works - HOP0001			ţ.
- Next Activity	* Type * Subject	Judith Mudzengi Phone call Market New Products Market New Products			
- Activity Attendees	Attendees 3 Send Email Invites		Case contact and sale	sman are always made attendees -	
- Schedule	When	12 Sep 2019 from 11:00 Email SMS 30 minutes	to 12:00		
Submit Options	Show customer after save	•			
			🖹 Save		

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



CCM BPO2 Test	Environment				Judith Mudzengi 🌻
📞 Create (	Cold Call				🔶 🗎
- Customer	* Customer Riversic * Rank Diamon Reg. No 789065	d (5 days)		* Type Construction VAT No 908753637	Î
- Salesmen	Abigail Milne     Adele Weeder     Ades Spanganberg     Almaria Tascy     Andromache Joselevitch     Angle Roseborough     Armando Raicheit     Arr Neelin		Chris Haynes Ø C03 Admin Colin Holden Dalene Pillay Darryl Muller Debble Lugar Derrick Weeder Edvell Maskva	Judich Mudzengi     Kašhmira Kirghin     Kašhmira Kirghin     Koste Brogbindth     Lucky Mavuye     Malory Allbon     Marc Rappald     Marius Enablrecht	
- Contact	* Full name Joel Rei * Telephone 031 210			Email joelreeds@email.com	
- Address	Existing New Address Line 1 12 Selb Address Line 2 7 Colint Suburb Gillts City Durban Province/State KZN Post Code 4000 County RSA				
- Case	* Subject Market Information Market	New Products			
	* Value 200000 Case Type New Cu			Source Type Referral	
- Related Customers	Related Customers 😋 Hop 🛚 Hop	e Works: HOP0001 e Works - HOP0001			Ü
- Next Activity	* Salesman Judith I * Type Phone * Subject Market Comments Market	call New Products			
- Activity Attendees	1 John Page 1 d	ohn Smith; Hope Works a Smith f 1 (1 items) ( [1] ) (1) te that invitations can only b	e sent to attendees with valid email address	85	5 → 🕅
- Schedule		2019 from 13:00 to SMS 30 minutes be			
Submit Options	Show customer after save 🕑				
			🖺 Save		

#### **Schedule Section**

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



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

CCM BPO2 Test	Environment				Judith Mudzengi 🔅
📞 Create (	Cold Call				🔶 🗎
- Customer	* Rank	Riverside Investments Diamond (5 days) 789065		* Type Construction VAT No 908753637	
- Salesmen	Abigail Milne     Adele Weeder     Alex Spangenberg     Almein Teacy     Andrein Teacy     Andrein Teacy     Andrein Roseborough     Armado Reichelt     Ary Huelin	с.	Chris Haynes 9 C03 Admin Colin Holden Dalene Pillay Darry Muller Debbin Lugar Debrik Weeder Edwell Maskva	Judith Mudzengi     Kashmira Nirghin     Kash Malland     Kim Engellenecht     Lucky Mawuye     Malory Allibon     Marc Repsold     Marcs Engelsrecht	Í
- Contact	* Full name * Telephone	Joel Reeds 031 210 455		Email joelreeds@email.com	
- Address	Address Line 2 Suburb	12 Selby Court 7 Colinton Rd Gillits Durban KZN 4000			
- Case	Information	Market New Products Market New Products			
		200000 New Customer		Source Type Referral	
- Related Customers	Related Customers	O Hope Works; HOP0001 ■ Hope Works - HOP0001			<b></b>
- Next Activity	* Type * Subject	Judith Mudzengi Phone call Market New Products Market New Products			
- Activity Attendees		<ul> <li>John Smith: Hope Works</li> <li>John Smith</li> <li>Page 1 of 1 (1 items) &lt; [1] a million</li> <li>*note that invitations can only be</li> </ul>	sent to attendees with valid email addresse	15	Paga sizar 10 🐷
- Schedule		12 Sep 2019 from 11:00 to Email SMS 20 minute befor			
Submit Options	Show customer after save				
		00	🖹 Save		

## **Submit Options Section**

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



CRM BPO2 Test	Environment		Juc	lith Mudzengi 🄅
📞 Create (	Cold Call			🔶 🖨
- Customer	Customer Riverside Investments * Rank. ⊡Diamond (5 days) Reg. No. 789065		* Type Construction VAT No 908753637	
- Salesmen	Adjagi Mine     Adjagi Mine     Adjagi Ation     Adjagi Atarian     Adjagi Atarian     Angi Tasaborugh     Angi Tasaborugh     Angi Tasaborugh     Angi Tasaborugh     Angi Atarian     Angi Atarian	Chris Haynes CO3 Admin Colin Holden Dalene Pillay Darryh Muller Debbie Lugar Derrick Weeden Edwiell Maskva	Judit Middangi     Adult Middangi     Adavia Ka Middan     Kanada     Ka Midda     Ka Midda     Ka Midda     Ka Midda     Ka Midda     Maruke     Maku Midda     Maru Repaida     Maruke Englehecht	
- Contact	* Full name Joel Reeds * Telephone 031 210 455		Email joelreeds@email.com	
- Address	Existing New Address Line 1 12 Selby Court Address Line 2 7 Colliton Rd Suburb Gillts City Duthan Provincu/State KZN Petr Code 4000 Country: RSA			
- Case	<ul> <li>Subject Market New Products Information Markat New Products</li> <li>Value 200000</li> </ul>			
	Case Type New Customer		Source Type Referral	
- Related Customers	Related Customers 📀 Hope Works; HOP0001 🛚 Hope Works - HOP0001			<b></b>
- Next Activity	<ul> <li>Salesman Judith Mudzengi</li> <li>Type Phone call</li> <li>Subject Market New Products</li> <li>Comments Market New Products</li> </ul>			
- Activity Attendees	Attendees O John Smith; Hope Works 1 John Smith Page 1 of 1 ( Jerms) ( 1) ; m Send Email Invites   *note that invitations can only be sent t	to attendees with valid email addresses		Page size: 10 💌
- Schedule	When 13 Sep 2019 from 11:00 to 12: Reminder Email SMS 30 minutes before sch			
Submit Options	Show customer after save 🕑			
		Save		

#### SAVE

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



CCM BPO2 Test	Environment					Judith Mudzengi 🌣
📞 Create C	Cold Call					🔶 🗎
- Customer		verside Investments Diamond (5 days) 9065			Construction 908753637	2
- Salesmen	Abigail Milne     Adele Weeder     Alex Spangenberg     Almeria Teacy     Andremache Joselevitch     Angle Roseborough     Armando Reicheit     Ary Huelin		Chris Haynes CO3 Admin Colin Holden Dalene Pillay Darry! Muller Debbie Lugar Debrick Weeder Edwell Msakwa		Judith Mudzengi     Kashmira Nirghin     Kesia Maitland     Kim Engelbrecht     Lucky Manuye     Malory Allibon     Marc Repaold     Marius Engelbrecht	~
- Contact	* Full name Joe * Telephone 03:			Email	joelreeds@email.com	
- Address	Existing Ne Address Line 1 12 Address Line 2 7 C Suburb Gil City Du Province/State K2 Post Code 40 County R5	Selby Court Solinton Rd lits rban N 00				
- Case						
- Related Customers	Related Customers 😲	Hope Works: HOP0001 Hope Works - HOP0001		Source Type	kererrai	
- Next Activity						
- Activity Attendees	1 Pag	John Smith: Hope Works John Smith ge 1 of 1 (1 items) c [1] ) in *note that invitations can only be	sent to attendees with valid email	ddresses		Page sizes 10 💌
- Schedule	When 13 Reminder Em	Sep 2019 from 11:00 to ail 🗹 SMS 🗌 30 minutes befo	12:00 re scheduled start			
Submit Options	Show customer after save 🕑					
		Q	Save			

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



## Cold Call

CSU BPO3	? Test Enviror	nment		Judith Mudzer	ngi 🍄 🗎
📕 Rive	rside Inves	stments		🕀 Search	Q
Acti	ivities for La	ast 30 Days	Performance	Pipeline	
Acti	Target Nothing to d		0.00 0.40 0.20 0.00 0 0.2 0.4 0.6 0.3 1	Fetching data	
create cold call	recommendations	Riversid warnings	le Investments - RIV0001 Trading Name Riverside Investments Registered Name Riverside Investments Description VAT No 908753637 Registration 789065	75%	
customers	cases	activities	Rank Diamond Website http:// Phone 031 210 455		
Quotes	orders	A invoices	12 Months Sales	s History	
sredit notes	¢¢	<b>Q</b> contracts	83 025 022 0.1		
service calls	Sird party	and a second sec	0.05 	4	
			@2019 CO3 Technologies (Pky) Ltd ( 3.5.5.1 / 3.5.5.1)		

## CREATE COLD CALL FOR EXISTING CUSTOMER

### **Customer Section**

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



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

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



Customer       * Customer       * Customer       * Customer       * September 12:000000000000000000000000000000000000	CRM BPO2 Test En	vironment							Judith Mudzengi 🌣
Image: Normal State       Selection 1 Section	📞 Create Co	ld Call	0						🔶 🗎
Image:	- Customer	* Customer	Нор						
Neg. No       Typesees       Cell kynbigiliser       Cell kynbigiliser       Cell kynbigiliser       N         - Contact       ** Full name       ** Full name <th></th> <th>* Rank</th> <th>Code</th> <th></th> <th></th> <th></th> <th></th> <th>ner type</th> <th></th>		* Rank	Code					ner type	
+ Salesmen       1799977       Extended Athogrenace Extended Athogrenace N         - Contact       **Fell name       1799977       Totande Kathogrenace Standed Athogrenace N         - Contact       **Fell name       1799977       Totande Kathogrenace N       Image: Non-Standed Athogrenace N         + Address       **Telephone       1799711       Kybioliskary Function       Kybioliskary Function       Kybioliskary Function       Kybioliskary Function       Nybioliskary Function		Reg. No						≜ er	
- Contact       * Full name       1000001       Hole Works       Noe Works       No         * Contact       * Full name       * Full name       1000001       Krybholekty Customize Krybholekty Krybholekty Customize Krybholekty Krybhol	and the second se							-	
- Contact       * Full man       1955488       Kythinilistry function       Ky	+ Salesmen		And the first of the first of the					_   →	
* Telephone       1929451       Kyphilipilatry function       Kyphoplatry function       N       Intervalue	Contract	Sales and the second							
Address     Case     Subject The subject of the case     Information Additional information relating to the case     " Value 0     Case Type Type of Case     Source Type The type of source     Address     Source Type The type of source     Source Type The	- contact							-	
Address     Case     Subject The subject of the case     Information Additional information relating to the case     Source Type The type of source     Value 0     Case Type Type of Case     Source Type The type of source     Value 0     Case Type Type of additional information relating to the case     "Value 0     Case Type Type of Case     Source Type The type of source     Value 0     Case Type Type of additional information relating to the case     "Value 0     Case Type Type of additional information relating to the additing to the additional information relating to the additing to the		* Telephone						ress	
Information Additional information relating to the case         * Value 0         Case Type Type of Case         * Related Customers         • Next Activity         * Salesman Judith Mudzengi         * Type in the activity         * Subject The subject of the activity         * Subject The subject of the activity         * Subject The subject of the activity         * Schedule         When 12 Sep 2019 from 18:00 to 19:00         Reminder Email SMS _ 30 minutes before scheduled start         Submit Options       Show customer after save S	+ Address		/1509/11	Kypilopiasty IDX	Kyphoplasty IDX	Kyphopiasty IDX	N		
Information Additional Information relating to the case         • Value 0 Case Source Type The type of source         • Related Customers         • Next Activity         • Salesman Judith Mudzengi • Type Type of activity • Subject The subject of the activity Comments Additional Information relating to the activity         • Activity Attendees         • Schedule       When 12 Sep 2019 from 18:00 to 19:00 Reminder Email SMS _ 30 minutes before scheduled start         Submit Options       Show customer after save ☑	- Case	* Subject	The subject of the	case					
Value 0     Case Type The type of source     Source Type The type of source									
Next Activity       Salesman Judith Mudzengi         "Type Type of activity       "subject of the activity         "subject The subject of the activity       Comments Additional Information relating to the activity         + Activity Attendees						s	ource Type The I	type of source	
* Type Type of activity         * Subject The subject of the activity         * Subject The subject of the activity         Comments Additional Information relating to the activity         + Activity Attendees         - Schedule       When 12 Sep 2019 from 18:00 to 19:00 Reminder Email SMS 30 minutes before scheduled start         Submit Options       Show customer after save ☑	+ Related Customers								
Submit Options     Show customer after save	- Next Activity	" Salesman	Judith Mudzengi						
Submit Options     Show customer after save		* Type	Type of activity						
Activity Attendees         - Schedule       When 12 Sep 2019 from 18:00 to 19:00 Reminder Email: SMS: 30 minutes before scheduled start         Submit Options       Show customer after save I		" Subject							
+ Activity Attendees         - Schedule       When 12 Sep 2019 from 18:00 to 19:00 Reminder Email         Submit Options       Show customer after save Ø									
Submit Options     Show customer after save Ø		connents		non reading to the t					
Reminder Email     SMS     30 minutes before scheduled start       Submit Options     Show customer after save Ø	+ Activity Attendees								
Reminder Email     SMS     30 minutes before scheduled start       Submit Options     Show customer after save Ø	= Echodulo		12 Cap 2010 6	18:00 ht	10,00				
Submit Options Show customer after save 🗹	Schedule								
		Reminder	Email 📋 SMS 📋	30 minutes before	e scheduled start				
E Save	Submit Options	Show customer after save	V						
E Save									
E Save									
問 Save									
- Odve					🖹 Save				

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

CTM BPO2 Test B	Environment		Judith Mudzengi 🌣
📞 Create C	old Call		🗲 🖹
- Customer	<ul> <li>Customer Hope Works</li> <li>Rank Silver (60 days)</li> <li>Reg. Mo. Registration number</li> </ul>	✓ Type Retail VAT No. VAT number	←
+ Salesmen			
- Contact	" Full name Contact's full name " Telephone Contact's telephone number	Email Email address	
+ Address			
- Case	<ul> <li>Subject The subject of the case</li> <li>Information Additional information relating to the case</li> </ul>		
	← Value 0 Case Type Type of Case	Source Type The type of source	
+ Related Customers			
- Next Activity	<ul> <li>Salesman Judith Mudzengi         <ul> <li>Type: Type of activity</li> <li>Subject The subject of the activity</li> <li>Comments: Additional information relating to the activity</li> </ul> </li> </ul>		
+ Activity Attendees			
- Schedule	When 13 Sep 2019 from 11:00 to 12:00 Reminder Email 🗌 SMS 🔲 30 minutes before scheduled start		
Submit Options	Show customer after save 🕑		
	🖹 Save		



#### **Sales Section**

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

CCM BPO2 Test I	Environment			Judith Mudzengi 🌣
📞 Create C	old Call			🔶 🗎
- Customer	* Customer Hope Works * Rank Silver (50 days) Reg. No Registration numbe	r.	* Type Retail VAT No. VAT number	
- Salesmen	Abigail Milne     Adele Wieder     Adele Wieder     Alex Spangenberg     Andromache Joselevitch     Angle Roseborough     Armando Reichelt     Ary Huein	Chris Haynes Co3 Admin Colin Holden Darnyf Moller Derbike Lugar Derrick Weeder Edwell Maskva	Judith Mudzengi     Kashmira Nirghin     Kesia Maitland     Kim Engelbracht     Lucky Naruye     Malory Allibon     Marc Rappoln     Marius Engelbracht	← .
- Contact	* Full name Contact's full name * Telephone Contact's telephone	number	Email Email address	
+ Address				
- Case	Subject The subject of the c Information Additional informati     Value 0			
	Case Type Type of Case		Source Type The type of source	
+ Related Customers				
- Next Activity	<ul> <li>Salesman Judith Mudzengi</li> <li>Type Type of activity</li> <li>Subject The subject of the a Comments' Additional Information</li> </ul>			
+ Activity Attendees				
- Schedule	When 13 Sep 2019 from Reminder Email SMS	m 11:00 to 12:00 30 minutes before scheduled start		
Submit Options	Show customer after save 🕑			
		🖹 Save		

#### **Contact Section**

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



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

CCM BPO2 Test I	nvironment			Judith Mudzengi 🌣
🌜 Create C	old Call			🔶 🗎
- Customer	* Customer Hope Works * Rank Silver (60 days) Reg. No Registration number		* Type Retail VAT No VAT number	
- Salesmen	Abigail Milne     Adele Weeder     Adele Angeneberg     Anreria Teacy     Andromache Joselevitch     Angie Roseborough     Armando Reichelt     Ary Huelin	Chris Haynes OG3 Admin Colin Holden Dalene Ollay Dalene Ollay Debite Lugar Derrick Weeder Edvell Msakva	Judith Mudzengi     Kashmira Nirghin     Kesia Maitand     Kim Engelbrecht     Lucky Manuye     Malory Alliboo     Mark Engeloon     Mark Engeloon	
- Contact	* Full name: Contact's full name * Telephone: Contact's telephone numb	er	Email Email address	-
+ Address				
- Case	Subject The subject of the case Information Additional information relation	ating to the case		
	* Value 0			
+ Related Customers	Case Type Type of Case		Source Type The type of source	
- Next Activity	<ul> <li>Salesman Judith Mudzengi</li> <li>Type of activity</li> <li>Subject The subject of the activity</li> <li>Comments Additional information relations</li> </ul>			
+ Activity Attendees				
- Schedule	When 13 Sep 2019 from 1 Reminder Email SMS 30 m			
Submit Options	Show customer after save 🕑			
		🖹 Save		

### **Address Section**

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



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

CCM BPO2 Test	Environment			Judith Mudzengi 🌣
📞 Create (	Cold Call			🔶 🖪
- Customer	* Customer Hope Works ** Rank Silver (60 days) Reg. No Registration number		* Type Retail VAT No VAT number	
- Salesmen	Abigail Milne     Advie Weader     Alex Spangenberg     Ameria Tacogelevitch     Angle Rasberough     Armando Reichelt     Arv Huein	Chris Haynes C03 Admin Colin Holden Darryl Muller Derrick Weeder Edwil Maskva	Judith Mudsangi     Kashmira Nirghin     Kessa Halland     Kim Engelforecht     Lucky Marvuye     Malory Allibon     Marc Repsold     Marius Engelforecht	×
- Contact	<ul> <li>Full name John Smith</li> <li>Telephone 031 123 4567</li> </ul>		Email john@email.coza	
- Address	Existing Address for the contact Address Line 1 Address Line 1 Address Line 2 Address Line 2 Suburb Suburb City City Province/State Province/State Post Code Past Code Country Country	-		
- Case	<ul> <li>Subject The subject of the case</li> <li>Information Additional information relating to</li> </ul>	the case		
	* Value 0 Case Type Type of Case		Source Type The type of source	
+ Related Customers	<ul> <li>Salesman Judih Mudzengi</li> <li>Type Type of activity</li> <li>Subject The subject of the activity</li> <li>Comments: Additional information relating to</li> </ul>	the activity		
+ Activity Attendees				
- Schedule	When 13 Sep 2019 from 11:00 Reminder Email SMS 30 minutes t	to 12:00 before scheduled start		
Submit Options	Show customer after save 🕑			
		🖹 Save		

#### **Case Section**

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



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

CCM BPO2 Test	Environment			Judith Mudzengi 🌣
📞 Create C	Cold Call			🔶 🗎
- Customer	* Customer Hope Works * Rank Silver (60 days) Reg. No Registration number		* Type Retail VAT No VAT number	
- Salesmen	Abigail Milne     Adele Weeder     Adele Apageberg     Almeria Teacy     Andromache Joselevitch     Angie Resobrough     Armando Reichelt     Ary Huelin	Chris Haynes CO3 Admin Colin Holden Dafens Pillay Darnyl Moller Debbis Lugar Derhick Weeden Edwell Maakva	Judith Mudzengi     Kashmira Nirghin     Kesisi Maitland     Kim Engelbracht     Lucky Maruyé     Malory Allibon     Marc Repold     Marcs Engelbracht	•
- Contact	* Full name John Smith * Telephone 031 123 4567		Email john@email.coza	
- Address	Existing 26 Lavender Road Address Line 1 26 Lavender Road Address Line 2 Hew Town Suburb Forest Hills City Durban Province/State K2N Pest Code 1234 Country South Africa			
- Case	<ul> <li>Subject The subject of the case Information Additional information r</li> <li>Value 0</li> </ul>			-
+ Related Customers	Case Type Type of Case		Source Type The type of source	
- Next Activity	<ul> <li>Salesman Judith Mudzengi</li> <li>Type Type of activity</li> <li>Subject The subject of the activity</li> <li>Comments Additional Information of the activity</li> </ul>			
+ Activity Attendees				
- Schedule	When 13 Sep 2019 from Reminder Email SMS 30			
Submit Options	Show customer after save 🕑			
		🖹 Save		

#### **Related Customer Section**

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



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

CRM BPO2 Test	Environment			Judith Mudzengi 🄅
📞 Create C	Cold Call			÷ 🗎
= Salesmen	Abigail Milne     Adele Weeder     Alex Spangenberg     Almeria Teacy     Andromache Joselevitch     Angie Roseborough     Armando Reichelt     Arv Huein	Chris Haynes C03 Admin Colin Holden Dalene Pilay Dary Muller Debbie Lugar Debbie Lugar Derkic Weeder Edwell Maskva	Judith Mudzengi     Kashmira Nirghin     Kessi Maldand     Kim Engelbrecht     Lucky Maivuye     Malory Allibon     Marc Repsold     Marius Engelbrecht	Î
- Contact	* Full name * Telephone		Email_john@email.coza	
- Address	Address Line 1 Address Line 2 Suburb City Province/State Post Code	orest Hills urban ZN		
- Case		ite Inspection ite Inspection		
	* Value Case Type		Source Type Cold Call	
- Related Customers	Related Customers	D €Related Customers o data to display		
- Next Activity	* Salesman * Type * Subject	udth Mudzengi ype of activity is subject of the activity ditional information relating to the activity		
+ Activity Attendees				
- Schedule		3 Sep 2019 from 11:00 to 12:00 mail SMS 30 minutes before scheduled start		
Submit Options	Show customer after save	2		
		🖹 Save		

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



CCM BPO2 Test E	invironment				Judith Mudzengi 🌣
📞 Create C	old Call				÷ 🗎
- Customer		Hope Works Silver (60 days) Registration number		* Type Retail VAT No VAT number	
- Salesmen	Abigail Milne     Adele Weeder     Alex Spangenberg     Almeria Teacy     Andromache Joselevitch     Angie Roseborough     Armande Reichelt     Arv Huelin		Chris Haynes CO3 Admin Colin Holden Dalene Pillay Darryl Muller Debbie Lugar Derrick Weeder Edwell Msakwa	Judith Mudzengi     Kashmira Nirghin     Kessia Matiland     Kim Engelbracht     Lucky Marvuye     Malory Allibon     Marc Repsold     Marius Engelbracht	
- Contact	* Full name * Telephone	John Smith 031 123 4567		Email john@email.coza	
- Address	Address Line 1 Address Line 2 Suburb City Province/State Post Code	Forest Hills Durban KZN			
- Case	Information * Value	Site Inspection Site Inspection 100000 Corporate Customer		Source Type 'Cold Call	
- Related Customers		<ul> <li>JIRA Networked: 71505555</li> <li>JIRA Networked - 71505555</li> </ul>			3→ 🗎
- Next Activity	* Type * Subject	Judith Mudzengi Type of activity The subject of the activity Additional information relating to t	the activity		
+ Activity Attendees					
- Schedule		13 Sep 2019 from 11:00 Email SMS 30 minutes b			
Submit Options	Show customer after save	V			
			B Save		

## **Next Activity Section**

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



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

CCM BPO2 Test I	Environment				Judith Mudzengi 🌣
📞 Create C	old Call				🔶 🗎
- Salesmen	Abigail Milne     Adele Weeder     Alex Spangenberg     Almeria Teacy     Andromache Joselevitch     Angie Roseborough     Armando Reichelt     Arv Huelin		Chris Haynes CO3 Admin Colin Holden Dalene Pillay Darryl Muller Debbie Lugar Derrick Weeder Edwell Msakwa	Judith Mudsengi     Kashimia Nirghin     Kessia Maitland     Kim Engelbrecht     Lucky Mawuye     Malory Allibon     Marc Repsold     Marius Engelbrecht	• •
- Contact	* Full name * Telephone	John Smith 031 123 4567		Email john@email.coza	
- Address	Address Line 1 Address Line 2 Suburb City Province/State Post Code	Forest Hills Durban KZN			
- Case		Site Inspection Site Inspection			
	* Value Case Type			Source Type Cold Call	
- Related Customers	Related Customers	🕂 🗹 Related Customers No data to display			
- Next Activity	* Type * Subject	Judith Mudzengi Type of activity The subject of the activity Additional information relating to	the activity	←	
+ Activity Attendees					
- Schedule		13 Sep 2019 from 11:00 Email SMS 30 minutes			
Submit Options	Show customer after save				•
			B Save		

### **Activity Attendees Section**

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



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

CCM BPO2 Test E	Environment				Judith Mudzengi 🌣
📞 Create C	old Call				🔶 🗎
- Customer	* Rank	Hope Works Silver (60 days) Registration number		* Type Retail VAT No VAT number	
- Salesmen	Abigail Milne     Adele Weeder     Alex Spangenberg     Almeria Teacy     Andromache Joselevitch     Angie Roseborough     Armando Reichelt     Arv Huelin		Chris Haynes CO3 Admin Colin Holden Dalene Pillay Darnyl Muller Debbie Lugar Derrik Weeder Edwell Msakwa	Judith Mudzangi     Kashmira Nirghin     Kesisi Maitland     Kim Engelbrecht     Ludcy Manuye     Malory Alliboo     Marc Repool     Marc Repool	
- Contact	* Full name * Telephone	John Smith 031 123 4567		Email john@email.coza	
- Address	Address Line 1 Address Line 2 Suburb City Province/State Post Code	Forest Hills Durban KZN			
- Case		Site Inspection Site Inspection			
		100000 Corporate Customer		Source Type Cold Call	
- Related Customers	Related Customers	<ul> <li>Related Customers</li> <li>No data to display</li> </ul>			
- Next Activity	* Type * Subject	Judith Mudzengi Site inspection Site Inspection at site 2			
- Activity Attendees	Attendees			d salesman are always made attendees 🗲 🕕 🕕	
- Schedule	When	<ul> <li>*note that invitations can only</li> <li>13 Sep 2019 from 11:00</li> <li>Email SMS 30 minutes t</li> </ul>		d email addresses -4	
Submit Options	Show customer after save				
			🖹 Save		

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



CRM BPO2 Test	Environment					Judith Mudzengi 🌣
📞 Create (	Cold Call					🔶 🗎
- Customer	* Rank	Hope Works Silver (60 days) Registration number		* Type Re VAT No VA		
- Salesmen	Abigail Milne     Adele Weeder     Alex Spangenberg     Almeria Teacy     Andrea Teacy     Andrea Roseborough     Armando Reichelt     Ary Huelin		Chris Haynes C03 Admin Ø Colin Holden Dalene Pillay Darryl Muller Debbie Lugar Derrick Weeder Edwell Maskwa		Judith Mudzengi     Kashmira Nirghin     Kessia Maitland     Kim Engelbrecht     Lucky Mawuye     Malory Alibon     Marc Repsold     Marius Engelbrecht	
- Contact	* Full name * Telephone	John Smith 031 123 4567		Email joh	in@email.coza	
- Address	Address Line 1 Address Line 2 Suburb City Province/State Post Code	Forest Hills Durban KZN				
- Case	Information * Value	Site Inspection Site Inspection 100000 Corporate Customer		Source Type Co	ld Call	
- Related Customers		Related Customers     No data to display		Source type Co		
- Next Activity	* Type * Subject	Judith Mudzengi Site inspection Site Inspection Site inspection at site 2				
- Activity Attendees	Attendees	<ul> <li>Abigail Milne;</li> <li>Abigail Milne</li> </ul>				5>⊡
		and an arrest to have been a	s can only be sent to attendees with	valid email addresses		
- Schedule	When Reminder	13 Sep 2019 from Email SMS 30 n	11:00 to 12:00 ninutes before scheduled start			
Submit Options	Show customer after save	V				
			🖹 Save			

#### **Schedule Section**

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



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

📞 Create (	Cold Call				
Customer		Hope Works Silver (60 days) Registration number		* Type Retail VAT No VAT number	
Salesmen	Abigail Milne     Adele Weeder     Alex Spangenberg     Ameria Teacy     Andromache Joselevitch     Angie Roseborough     Armando Reichelt     Arv Huelin		Chris Haynes CO3 Admin Colin Holden Dalene Pillay Debbie Lugar Detrick Weeder Edvell Maakva	Judith Mudzengi     Kashmira Nirghin     Kosis Matland     Kim Engelbrecht     Lucky Maruyre     Malory Allibon     Marc Repsold     Marus Engelsrecht	
Contact	* Full name * Telephone	John Smith 031 123 4567		Email john@email.coza	
Address	Address Line 1 Address Line 2 Suburb City Province/State Post Code	Forest Hills Durban KZN			
Case	Information * Value				
Related Customers		Corporate Customer     Related Customers     No data to display		Source Type Cold Call	
Next Activity	* Type * Subject	Judith Mudzengi Site inspection Site Inspection Site inspection at site 2			
Activity Attendees	Attendees			isman are always made attendees	
Schedule	When		n only be sent to attendees with valid em	ail addresses	
	Show customer after save		use peroré scheduled start		

## **Submit Option Section**

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



Ade V Alex And And	<ul> <li>Customer Hope W</li> <li>Rank Silver (</li> <li>Reg. No Registra</li> <li>pail Milne</li> <li>Reedar</li> <li>cspangenberg</li> <li>aria Taacy</li> <li>romache Joselevitch</li> <li>ite Rossborough</li> <li>ando Reichelt</li> <li>Huelin</li> <li>Full name John Sr</li> <li>Telephone 031 122</li> <li>Existing 26 Lave</li> <li>Address Line 1 26 Lave</li> <li>Address Line 2 New TO</li> <li>Suburb Forest H</li> <li>City Durban</li> <li>Province/State KZN</li> <li>Poat Code 1234</li> <li>Country South A</li> </ul>	nith adon number ad 4567 ander Road ender Road win Hills	Chris Hayne O3 Admin Dalene Pila Dalene Pila Debbie Log Debbie Log Edwell Msak	er		Ratail WAT number 9 Judith Mudzengi 9 Kashmira Kippi 9 Kashmira Kippi 9 Kashmira Kippi 9 Kashmira Kippi 9 Mary Alibon 9 Mary Alibon 9 Mariya Encelbre 9 Marius Encelbre	in t	
- Contact	le Weeder (Spangenberg) erla Tacy formache Joselevitch lie Roseborough tando Reichelt Huelin * Full name. John Sr * Telephone. 0311123 Existing 26 Lave Address Line 1 26 Lave Address Line 2 New To Subort Forest L City Durban Province/State KZN Post Code. 1224 Country. South A	3 4567 ander Road ander Road wn Hills	CO3 Admin Colin Holden Dalene Pillay Darryl Mulle Debbie Luga Derrick Wee	er	Email j	Kashmira Nirghii Kessia Maitland Kim Engelbrecht Lucky Mawuye Malory Allibon Marc Repsold Marius Engelbree	in t	
- Address	* Telephone 031 123 Existing 26 Lave Address Line 1 26 Lave Address Line 2 New To Suburb Forest H City Durban Province/State K2M Post Code 1234 Country South A	3 4567 ander Road ander Road wn Hills			Email j	john@email.coza		
	Address Line 1 26 Lave Address Line 2 New To Suburb Forest H City Durban Province/State KZN Post Code 1234 Country South A	ender Road wn Hills						
- Case	* Subject Site Ins							
	Information Site Ins	pection						
	Case Type Corpora	ate Customer			Source Type	Cold Call		
- Related Customers	Related Customers 👴 Rel No data	ated Customers a to display						
- Next Activity	* Salesman Judith I * Type Site ins * Subject Site Ins Comments Site ins	pection						
- Activity Attendees	Attendees 😌 🗚 Send Email Invites 🗌 *no				man are always mad addresses	le attendees		
- Schedule	When 16 Sep Reminder Email	2019 from 1	1:00 to 12:00 nutes before scheduled sta					
Submit Options Show	customer after save 🗵	←						

#### Save

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



CCM BPO2 Test E	Environment				Judith Mudzengi 🌣
📞 Create C	old Call				🔶 🖨
- Customer	* Rank	Hope Works Silver (60 days) Registration number		* Type Retail VAT No VAT number	2
- Salesmen	Abigail Milne     Adele Weeder     Alex Spangenberg     Almeria Teacy     Andromache Joselevitch     Angie Roseborough     Armando Reichelt     Arv Huelin		Chris Haynes CO3 Admin Co1h Holden Dalene Pillay Derryt Muller Debbie Lugar Derrick Weeder Edwell Msakwa	Judith Mudzengi     Kashmira Nirghin     Kesia Maitland     Kim Engelbracht     Lucky Nawuye     Malory Allibon     Marc Repold     Marius Engelbracht	•
- Contact	* Full name * Telephone	John Smith 031 123 4567		Email john@email.coza	
- Address	Address Line 1 Address Line 2 Suburb City Province/State Post Code	Forest Hills Durban KZN			
- Case	Information * Value	Site Inspection Site Inspection 100000			
- Related Customers		Corporate Customer Related Customers No data to display		Source Type Cold Call	
- Next Activity	* Type * Subject	Judith Mudzengi Site inspection Site Inspection Site inspection at site 2			
- Activity Attendees		Attendees     *note that invitations ca	Case contact and	salesman are always made attendees email addresses	
- Schedule	When	16 Sep 2019 from 11 Email SMS 15 min	:00 to 12:00		
Submit Options	Show customer after save	V			
		0	► 🖹 Save		

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



## Cold Call

CTM BPO2	Test Enviro	nment					Judith Mudzengi
📕 Норе	e Works					🕀 S	earch
Act	ivities for I	Last 30 Days		1.00	Performance		Pipeline
Description		Existing Custmrs	New Custmrs				
				0.40			Fetching data
				0.00	0.2 0.4 0.6 0.8 1		
			Hope Works -	HOP0001	Trading Name Hope Works		750
	$\bigcirc$				Registered Name Hope Works Description		75%
create cold call					VAT No		
		1211-1417	ē		Rank Silver Website http://		
<b></b>	<b>T</b>	Ē	Cruated: 2019/01/18 9:	13:45 AM	Phone 031 123 4567		
customers		activities		I 🕅 🕞	23.		
199	a				12 Months Sa	laa Uistani	
					12 MOTULIS 3d	lies flistory	
quotes	orders	invoices			0.45		
					0.35		
5	0	<b>P</b>			0.25		
credit notes	equipment	contracts			0.15		
					0.1		
	2				and the state and and and the state and	AND HAVE DO AND THE TOP TOP TOP TOP	
service calls					and a start	and way must have been been and	
	and party				Contract Income	Sales Revenue	
.bo				©2019 CC	03 Technologies (Pty) Ltd ( 3.5.5.1 / 3.5.5.1)		

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