

# SALES CONNECT

## ENVIRONMENT

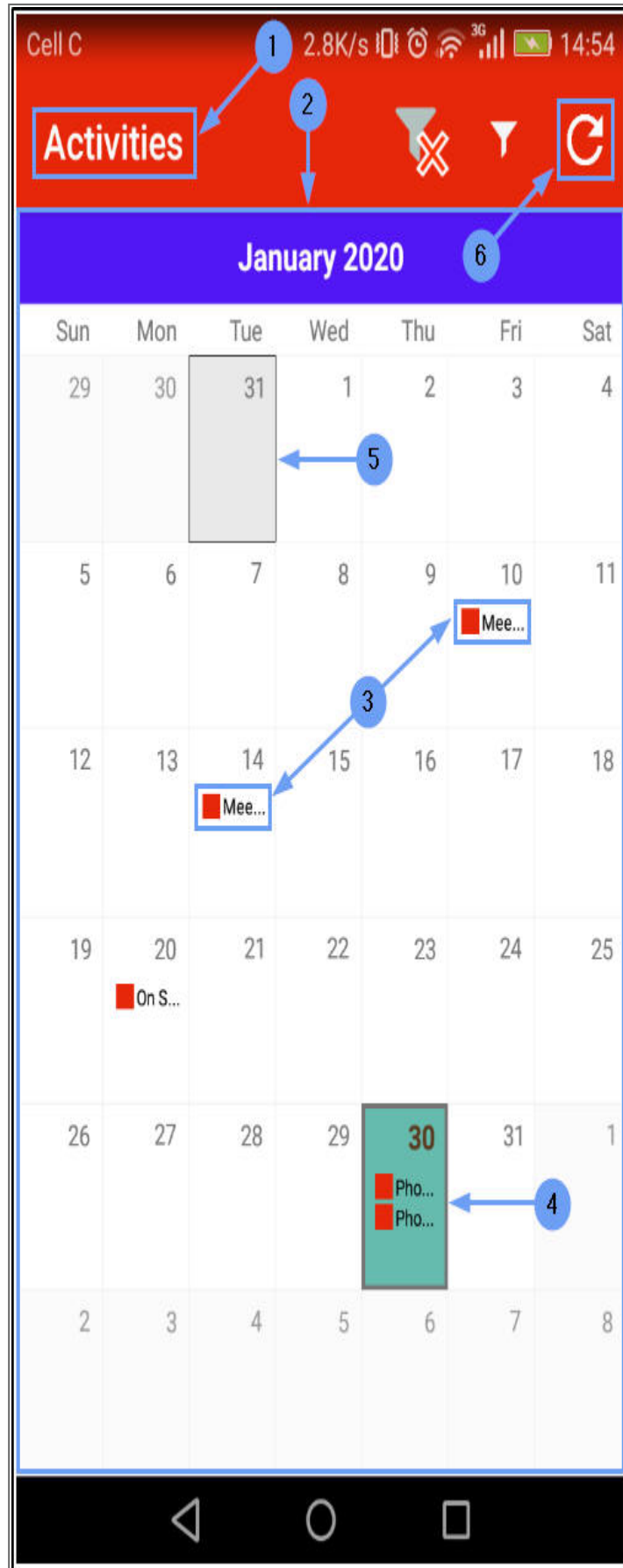
There are two main screens in the Sales Connect environment. After login the **Activities** screen will open. Selections made in this screen will direct you to the **Activity Details** screen. From here you are able to navigate to 3 subsidiary screens: the **Call** screen, the **Compose** screen and the **Start Travel** screen, as well as three **edit activity** screens: **Reschedule Activity**, **Add Photo** and **Add Activity Note**.

[\[Watch the video\]](#)

## ACTIVITIES SCREEN OVERVIEW

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1. After [initial login](#) the Activities screen will open.
2. This will display a **calendar view** of the current month.
  - i. Swipe left to view **future** months.
  - ii. Swipe right to view **previous** months.
  - iii. Touch and hold an area on your device with two fingers, then pinch them together to zoom out to see the **year view**.
  - iv. Touch and hold an area with two fingers. Then spread them apart to zoom back in to the **month view**.
3. The salesperson activities will display as **red squares** on the particular day that they are due.
4. The **current** day will be highlighted in colour.
5. Any day you tap on will be highlighted grey.
6. If there was a period where you did not have internet connection, you can select **Refresh** to check for any activities recently added in **CRM**.



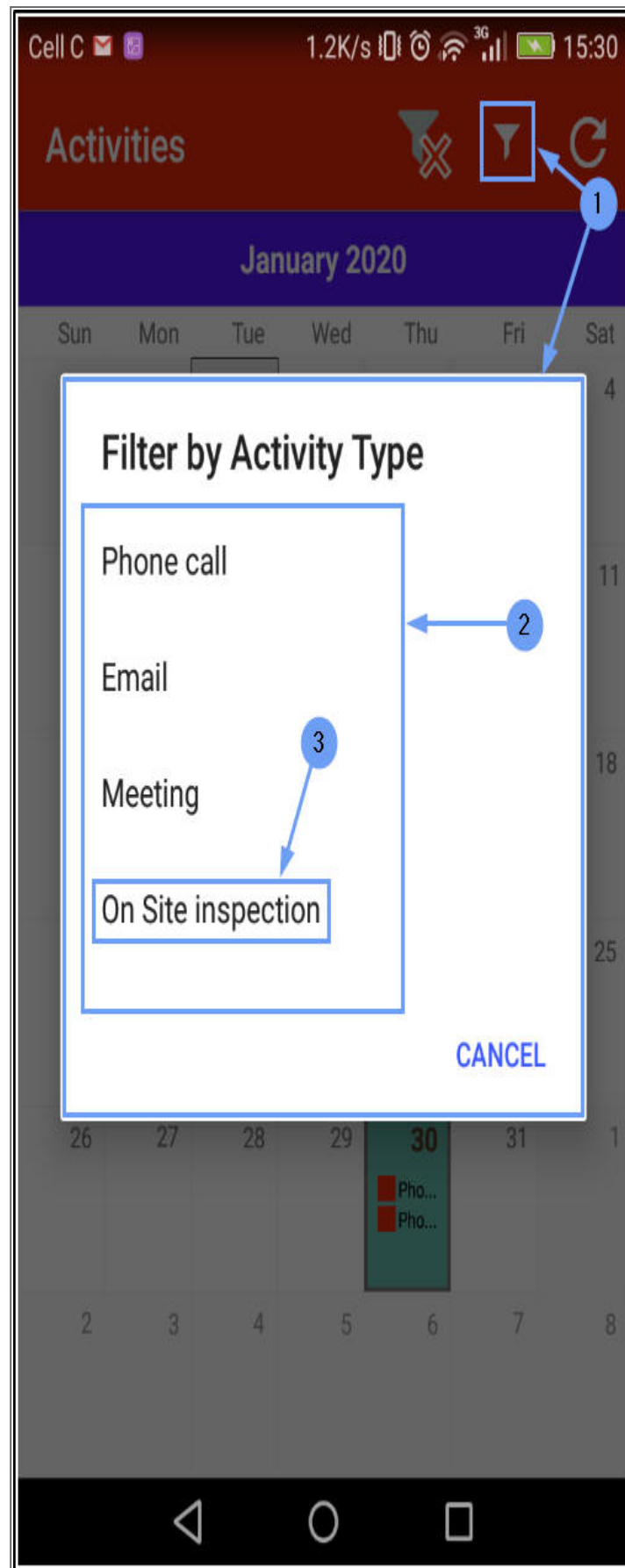
## **FILTER BY ACTIVITY TYPE**

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1. Tap on the Filter icon to display the **Filter by Activity Type** menu.
2. Select an **Activity Type** from the list.

Note: All Activity Types can be [configured in CRM](#) according to your company requirements.

3. In this example, **Site Inspection** has been selected.

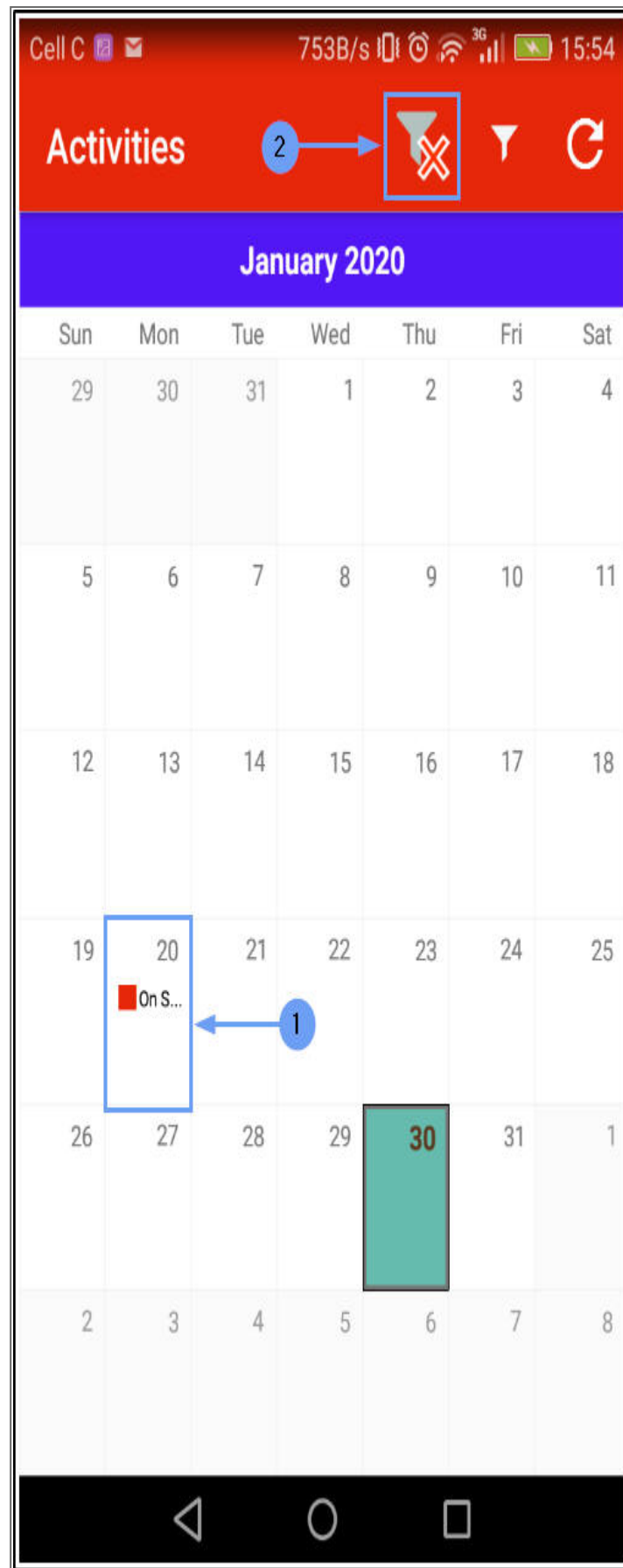


1. The screen will filter and display on the calendar, only the activity types selected in the previous step. In this example only **Site Inspection** activities are now displayed.

### **REMOVE ACTIVITY TYPE FILTER**

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2. Tap on the **Clear Filter** icon to display all the activity types again.



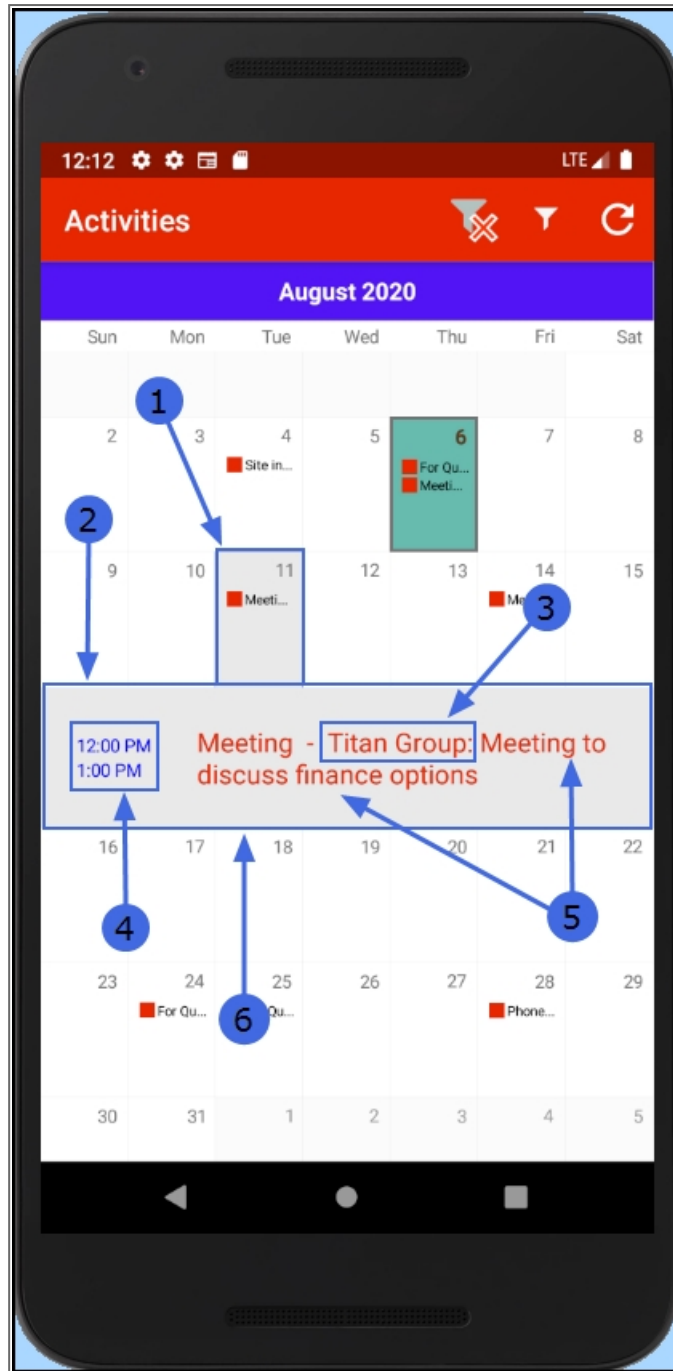
## QUICK VIEW ACTIVITY INFORMATION

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1. Tap on a **date** that contains an activity.
  - In this example the **11th** has been selected - this date contains a **Meeting** activity.
2. A **text box** will pop up with more information regarding the activity.

You can now view:

3. the **name** of the customer linked to the activity,
4. the **time** of the activity and
5. a brief **description** of the subject of the activity.
6. Tap on the text box.



## THE ACTIVITY DETAILS SCREEN

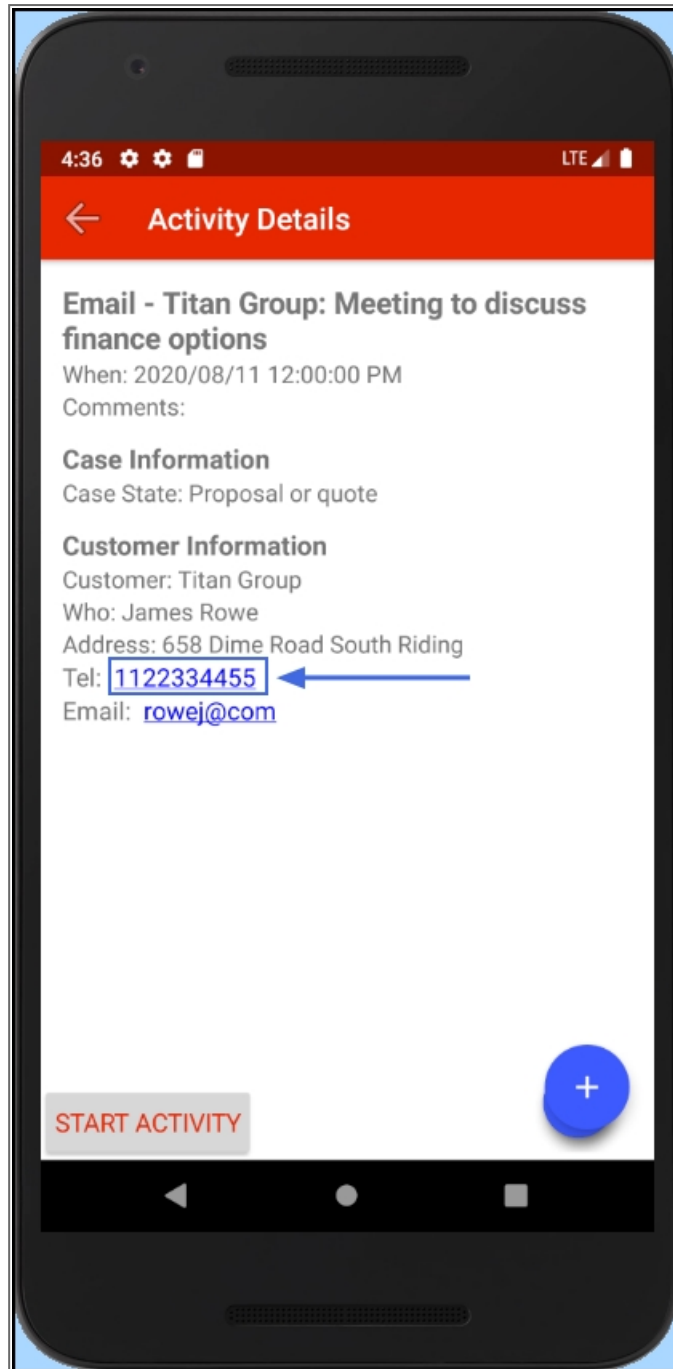
1. The Activity Details screen will be displayed.
2. Here you can view much more information regarding the activity:



3. any linked **Comments** (if text has been typed into the Activity 'Comments' section in CRM),
4. the **Case State** and
5. More **Customer** specifics, such as:
  - **who** the meeting is with and **where** it is (the **address** )
  - the **Telephone No.** and **Email Address** of the customer (if these details have been entered onto **CRM/BPO**).



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## ***The Call (Phone) Screen***

1. The **Call (Phone)** screen will be displayed. Here you can view: the **customer name** and **number**

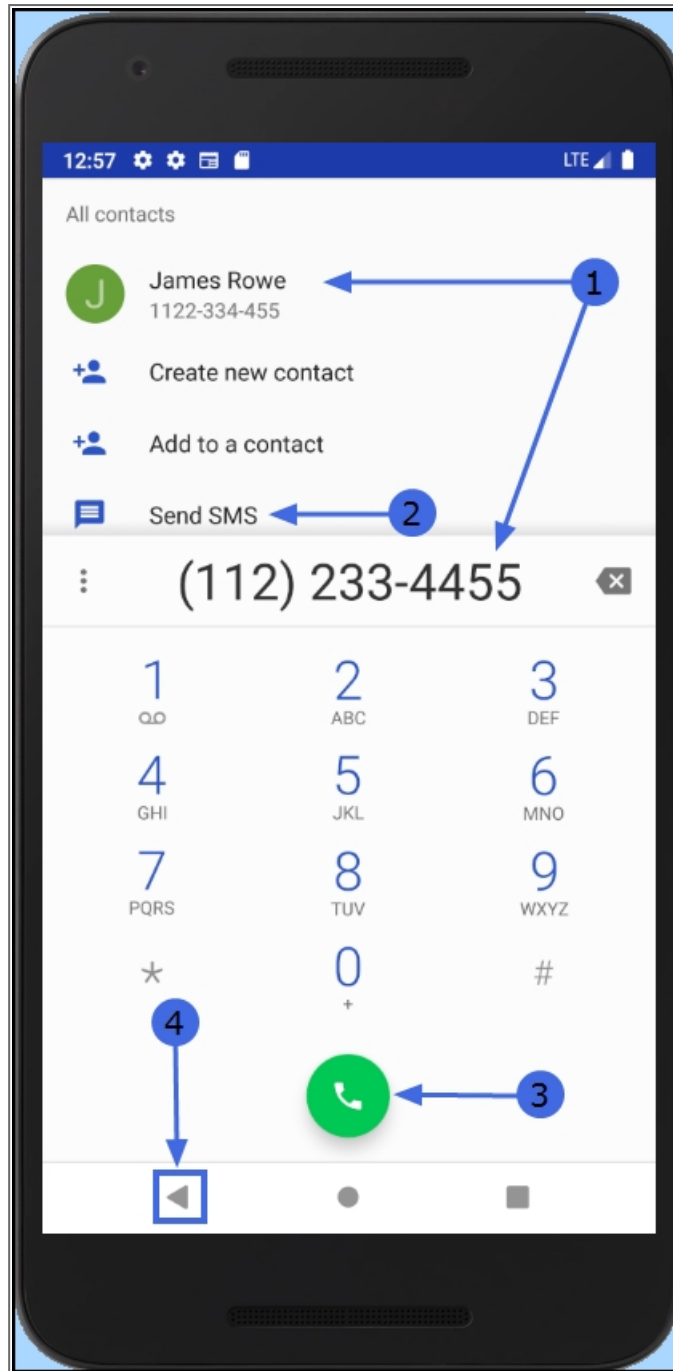
You can select whether to

2. send an **sms** or
3. **call** your customer

### ***Cancel Call / Exit Call (Phone) Screen***

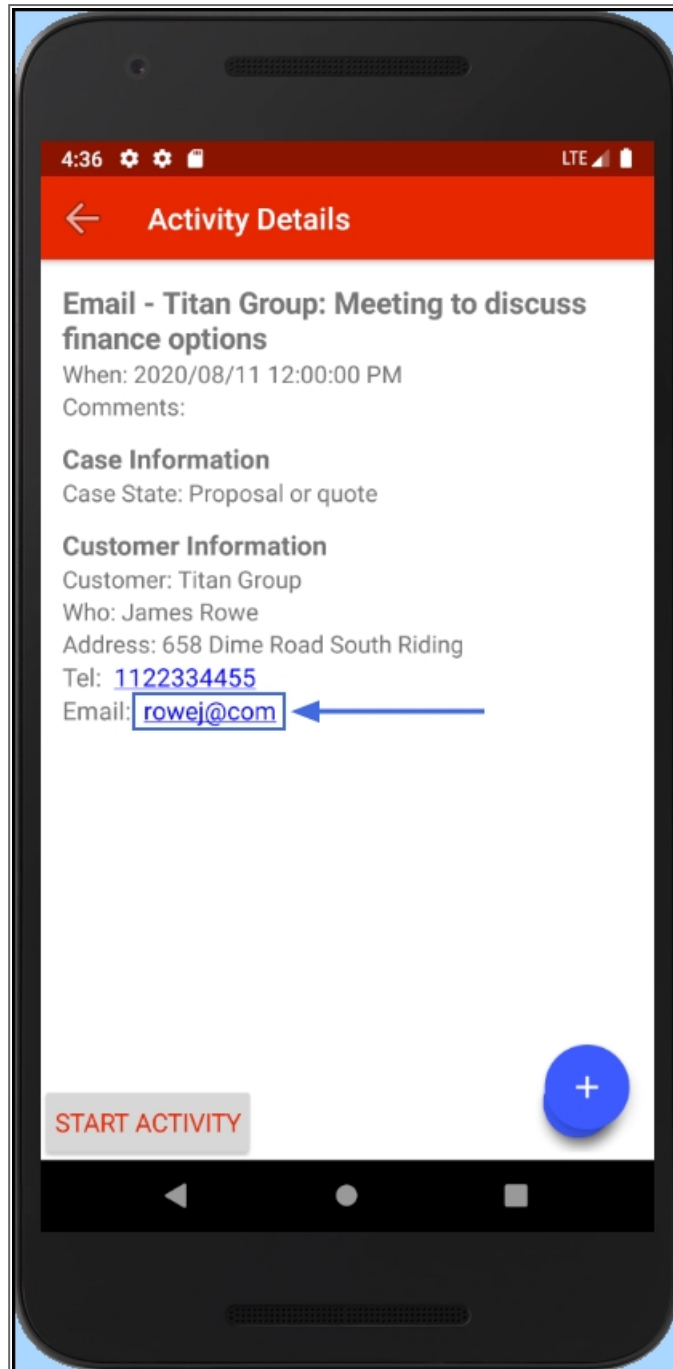
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4. Tap on the **Back** button to return to the **Activity Details** screen.



## EMAIL CUSTOMER – FROM THE ACTIVITY DETAILS SCREEN

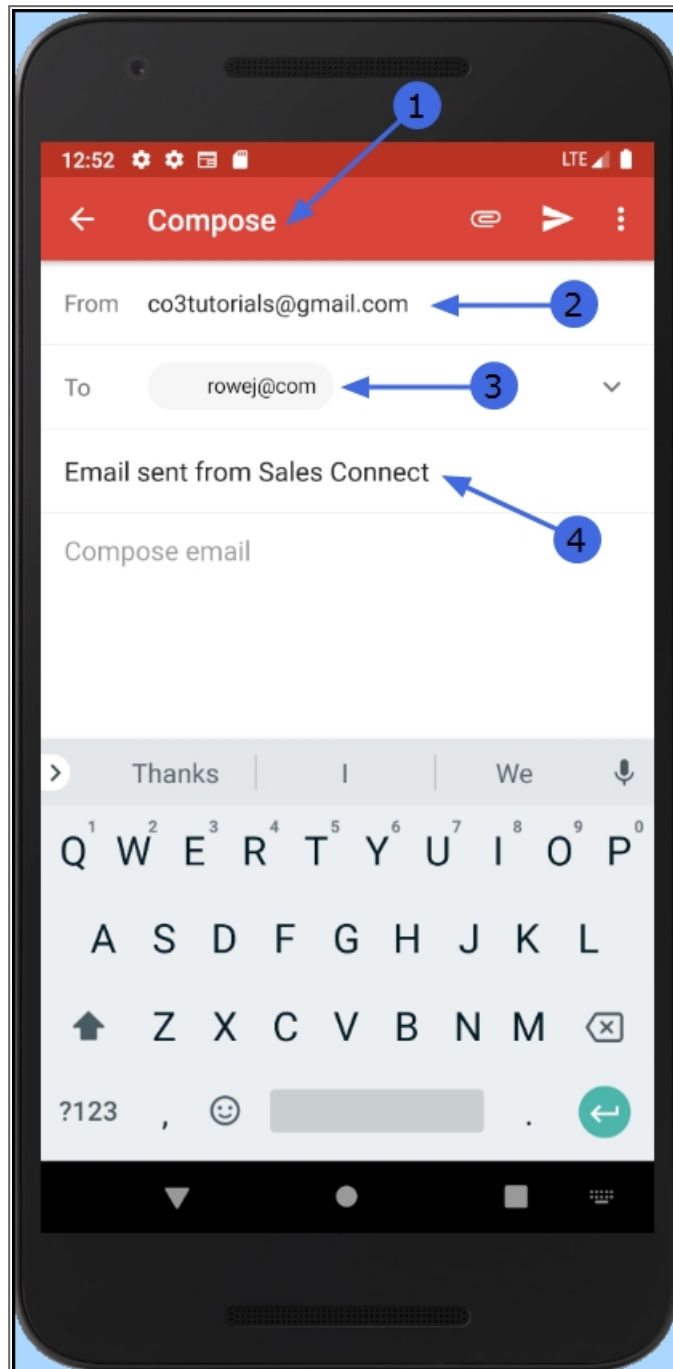
- In the Activity Details screen, tap on the blue customer Email Address.



### ***The Compose (Email) Screen***

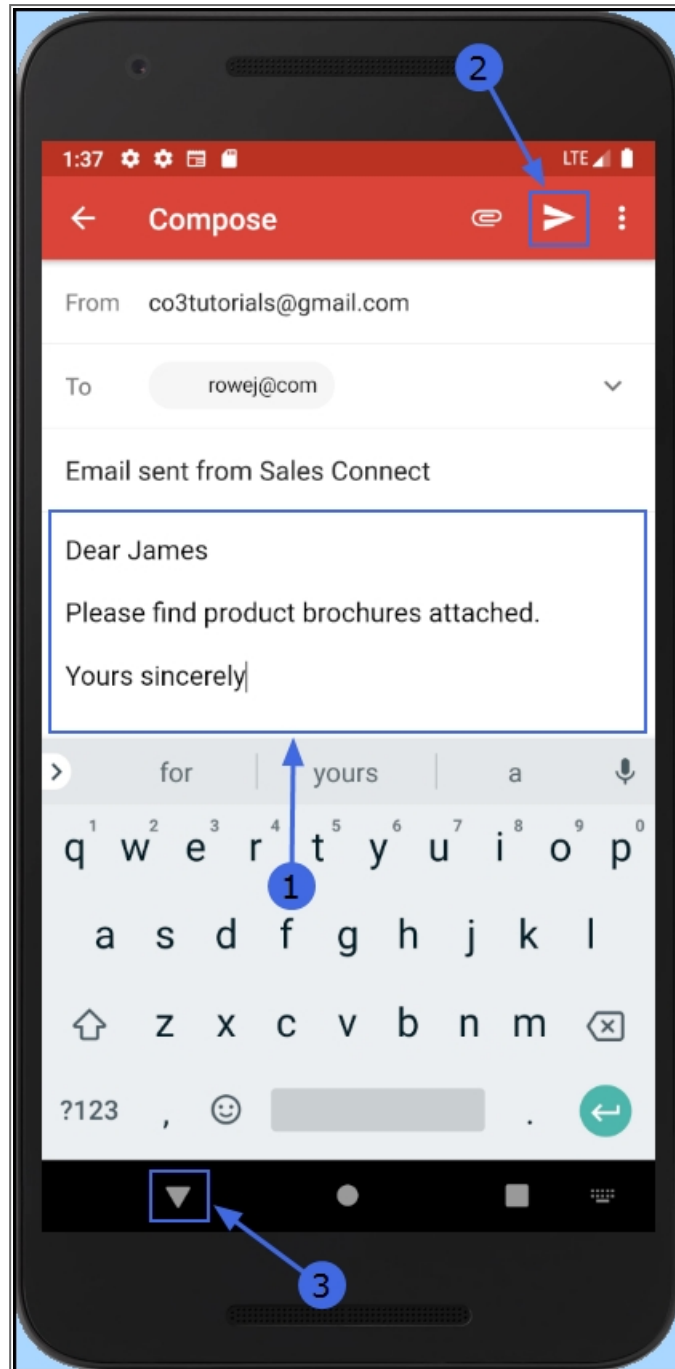
1. The **Compose** (Email) screen will be displayed. Here you can view:
2. **From:** the address from which this email will be sent.

3. **To:** the destination address.
4. **Email header:** This will be auto populated but you can replace the header text with your own words.



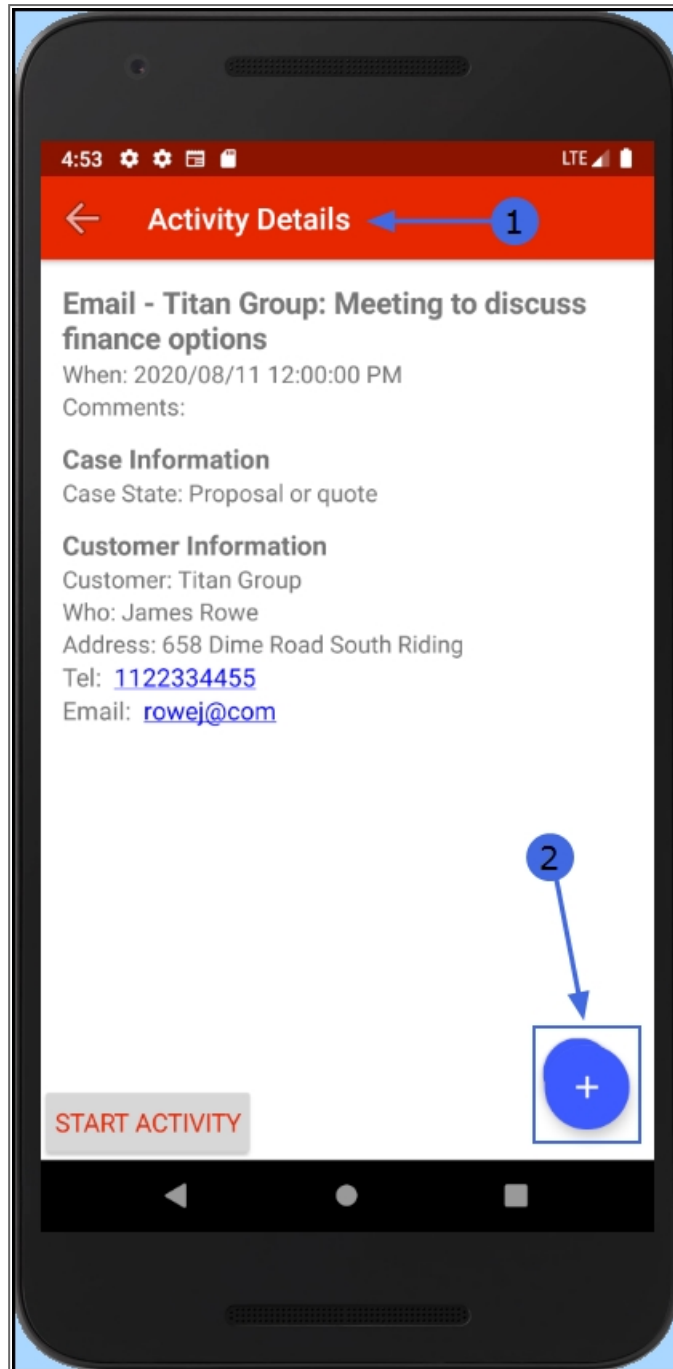
1. When you have composed your email content, either tap on
2. **Send** to dispatch your email, (you will then return to the **Activity Details** page) or
3. tap on **Back** to discard the email and return to the **Activity Details** page.





## THE ACTIVITY EDIT BUTTONS

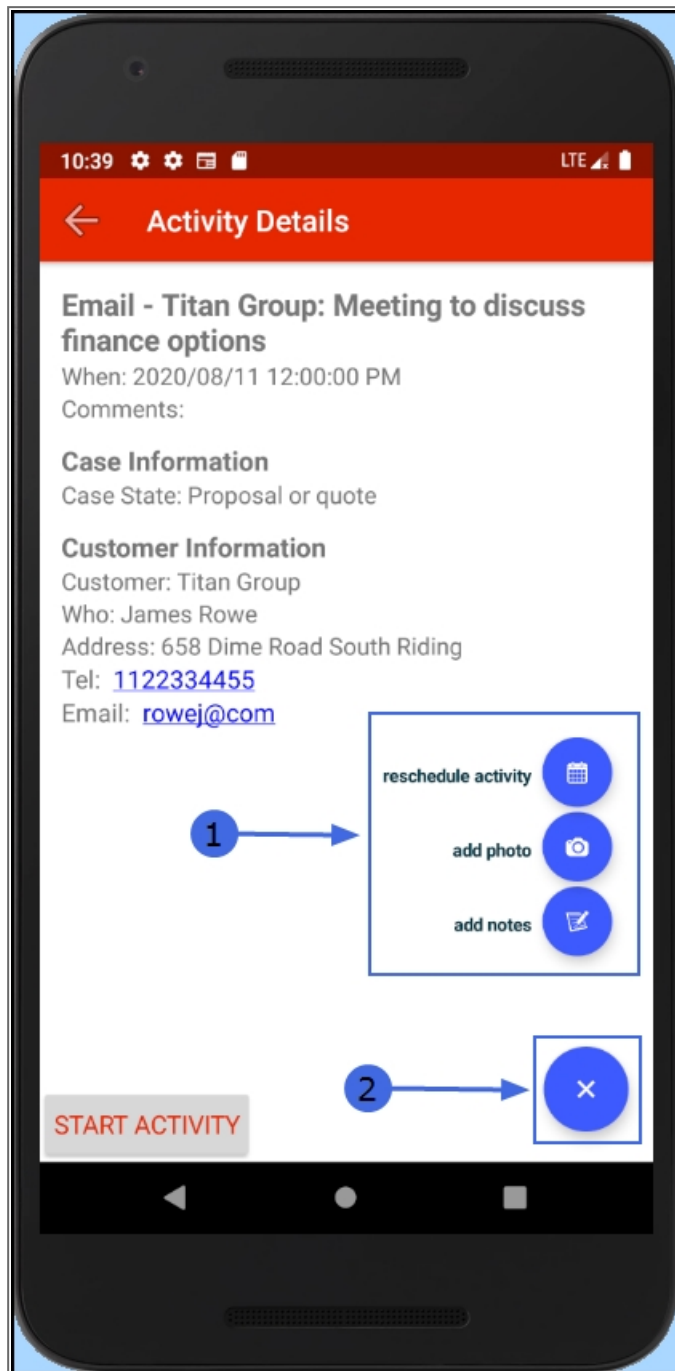
1. In the **Activity Details** screen,
2. tap on the expand [+]  
button.



1. The screen will now display 3 editing buttons:
  - i. **reschedule activity**
  - ii. **add photo**
  - iii. **add notes**

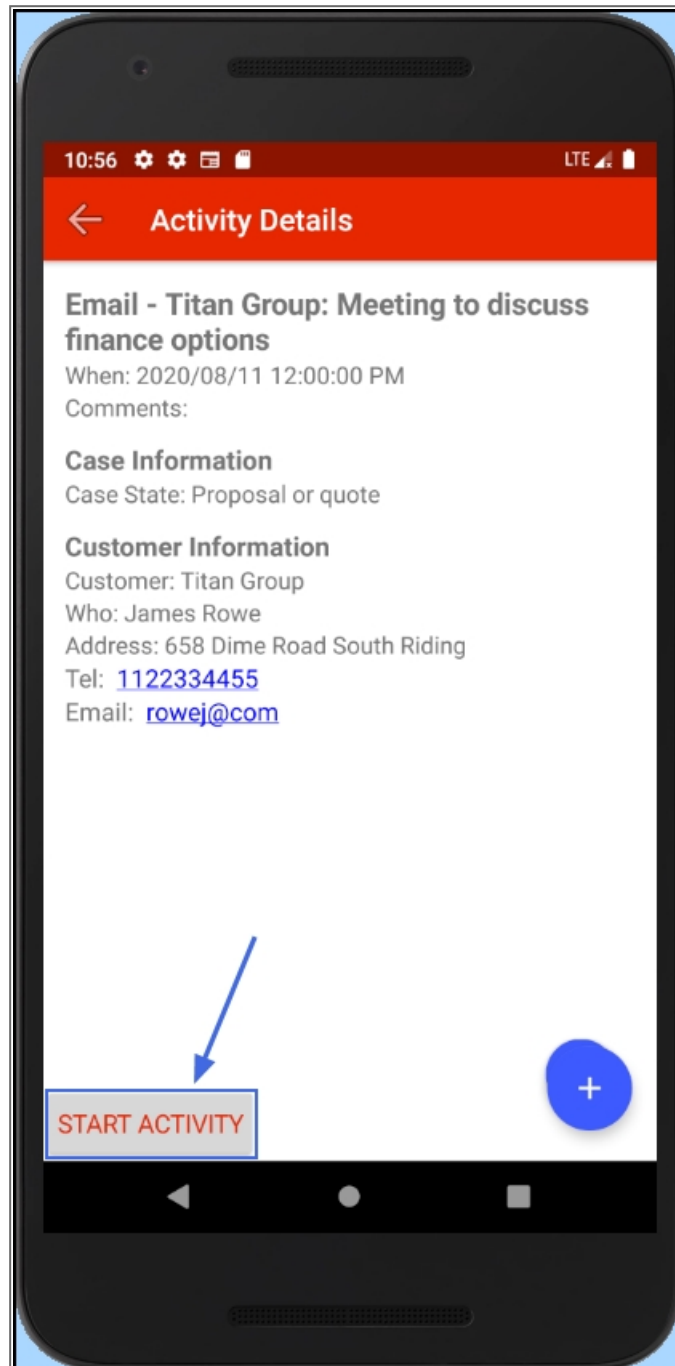
These are covered in more detail in the [Related Topics](#) manuals.

2. Tap on [x] to collapse the edit buttons.



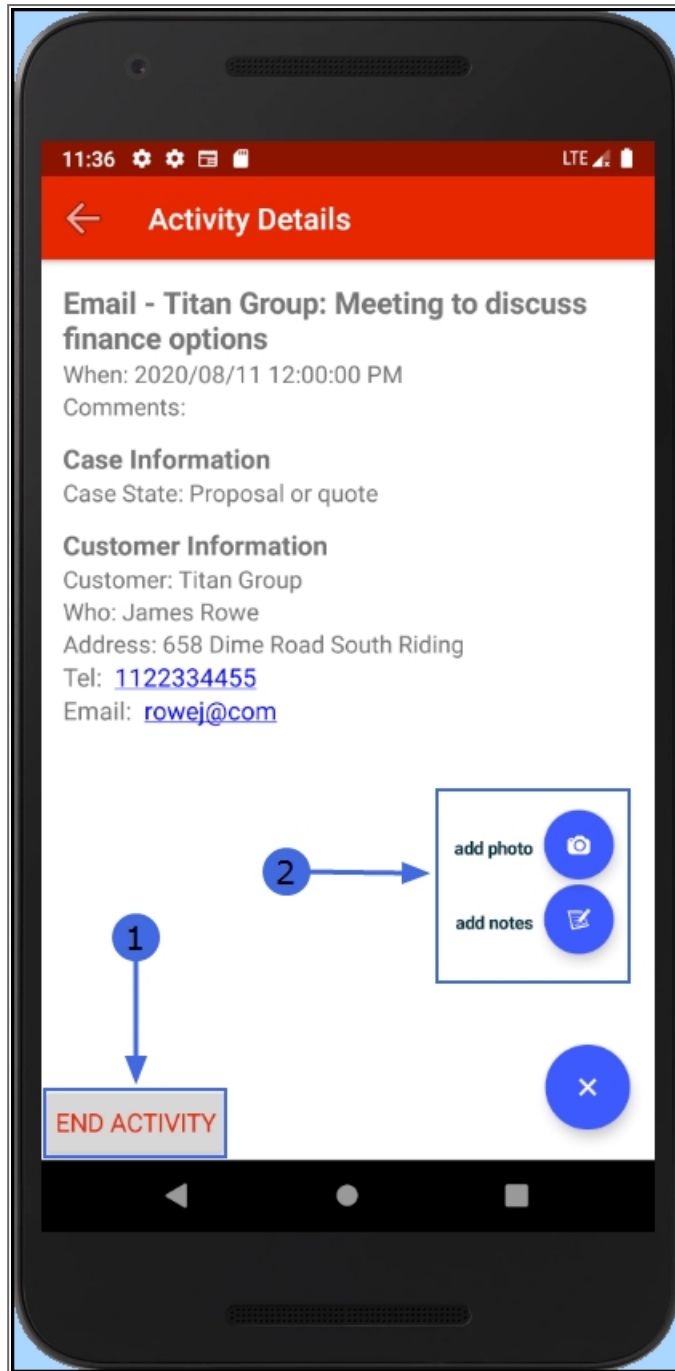
## THE START / END ACTIVITY BUTTON

- If the activity that you have selected to view has not yet begun, a **Start Activity** button will be available in this screen.
- When you are ready to begin the activity, tap on this button.



The screen will **refresh**

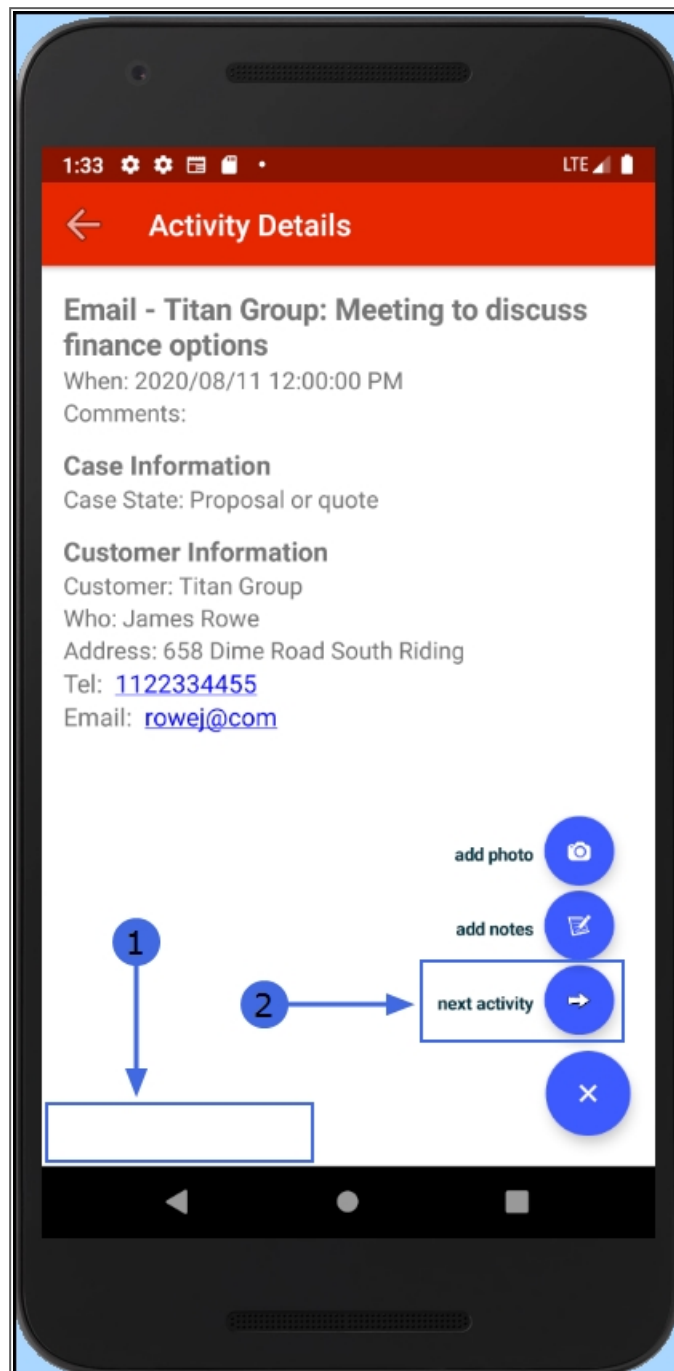
1. The button will now be replaced with the **End Activity** button.
2. If you tap on the expand **[+]** button, you will note that the **reschedule activity** button is no longer available. This is because the activity has already started, it can no longer be rescheduled. You are still able to link **Notes** and /or **Photos** to this activity.



## END ACTIVITY / NEXT ACTIVITY BUTTON

If you tap on the **End Activity** button, the screen will **refresh**,

1. the button will disappear and
2. the [+] button will automatically expand to display a new **Next Activity** button. Tap on this button.



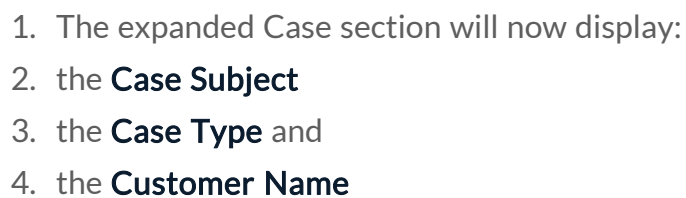
## ***The Next Activity Screen***

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The **Next Activity** screen will be displayed. All the fields except the Case section are editable.

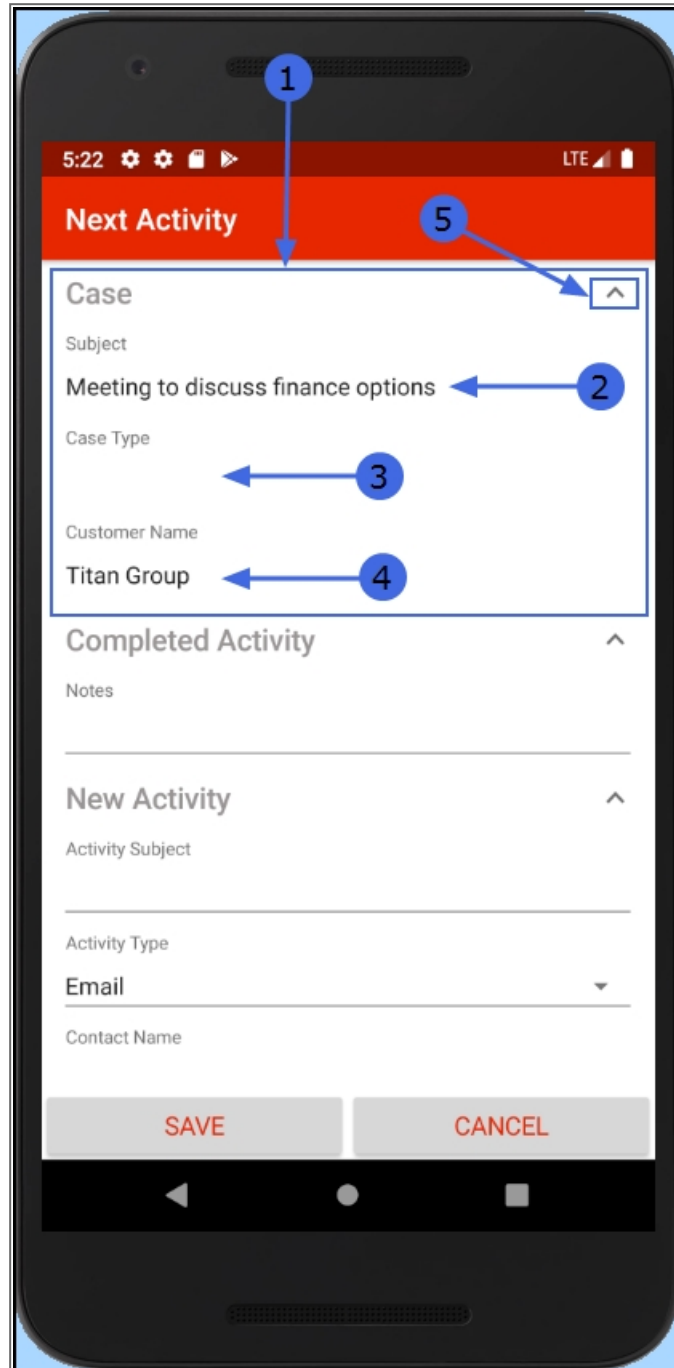
**Case:** tap on the drop-down arrow to expand this section.





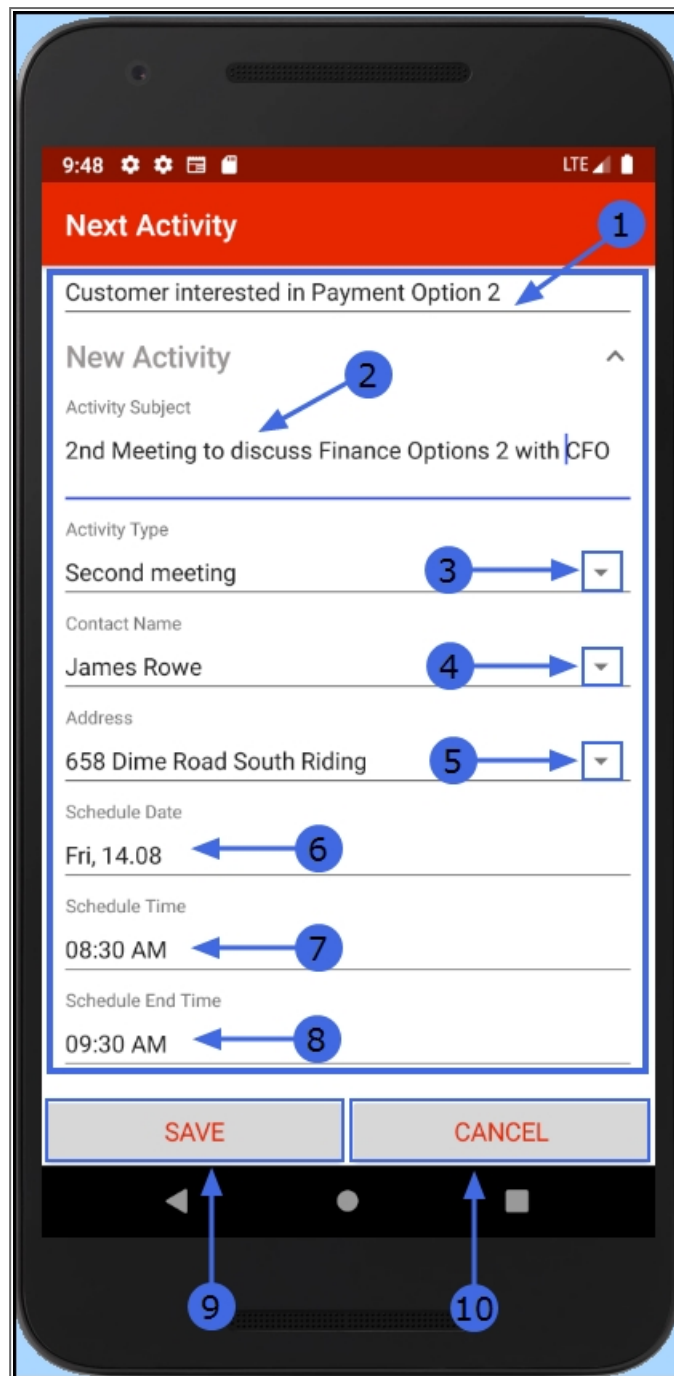
These fields are populated from information entered into **CRM** and are unreadable in **Sales Connect**.

5. **Collapse** the section when you have finished looking at it, to enable you to view and edit the remaining sections.



1. **Completed Activity:** Type in a note regarding the **outcome** of the completed activity, (for example any progress made).
2. **New Activity:** Type in a brief description regarding the **subject** of next activity.
3. **Activity Type:** Tap on the drop-down arrow and select from the menu, the **type** of this next activity.
4. **Contact Name:** Tap on the drop-down arrow and select from the menu, the **contact** you wish to link to this next activity.
5. **Address:** Tap on the drop-down arrow and select from the menu, the **address** you wish to link to this next activity.
6. **Schedule Date:** Tap on the date already populated in this field, to display the Calendar function. Select the **date** for the next activity.
7. **Schedule Time:** Tap on the time already populated in this field, to display the Clock function. Select the **start time** for the next activity.
8. **Schedule End Time:** Tap on the time already populated in this field, to display the Clock function. Select the **end time** for the next activity.
9. If you are happy with your changes, tap on **Save**,
10. or tap on **Cancel** to return to the Activity Details screen.

For the purpose of this manual, **Save** is selected.



9:48 9:48 LTE

**Next Activity** 1

Customer interested in Payment Option 2

**New Activity** 2

Activity Subject  
2nd Meeting to discuss Finance Options 2 with CFO

Activity Type  
Second meeting 3

Contact Name  
James Rowe 4

Address  
658 Dime Road South Riding 5

Schedule Date  
Fri, 14.08 6

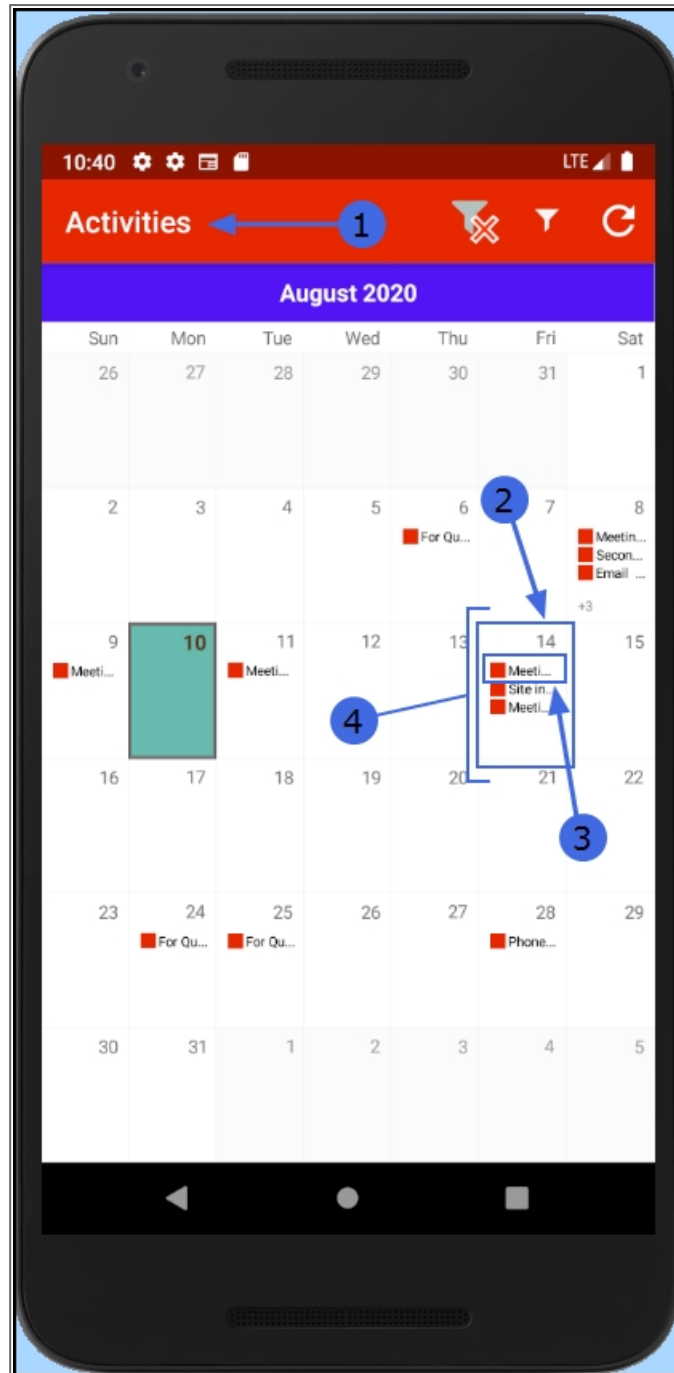
Schedule Time  
08:30 AM 7

Schedule End Time  
09:30 AM 8

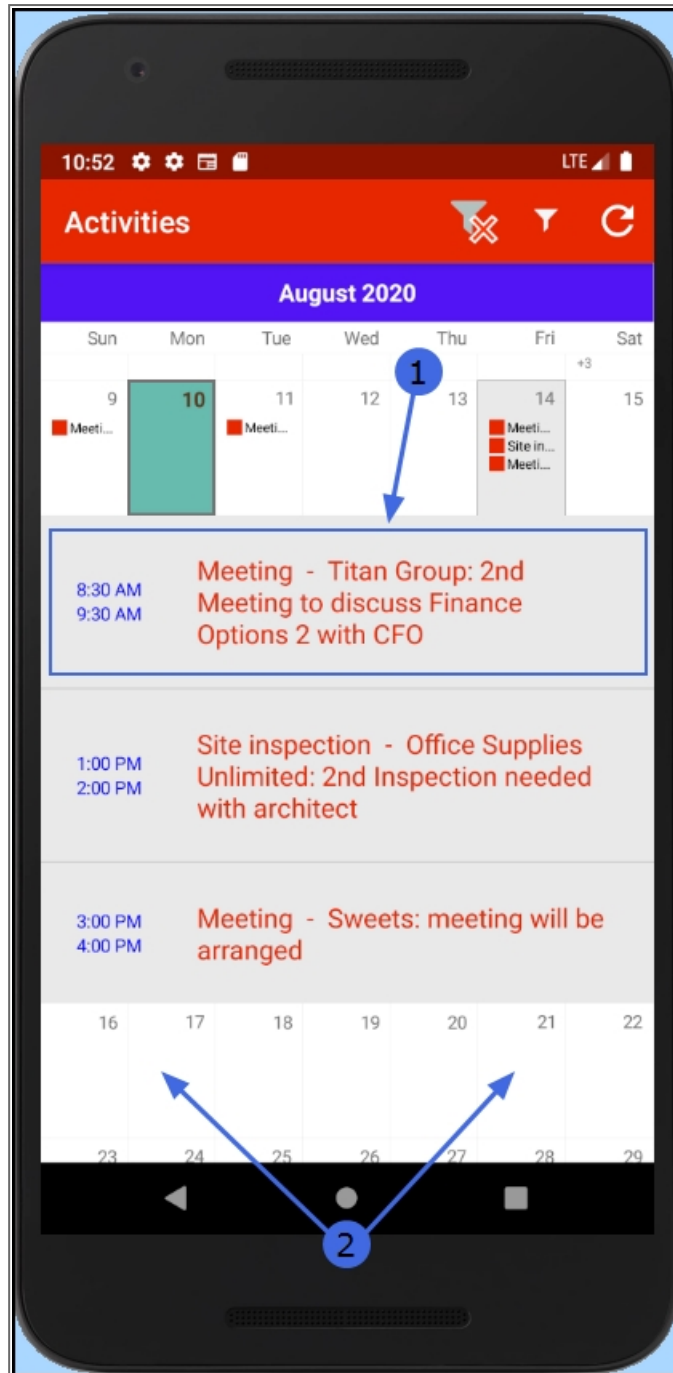
SAVE CANCEL

9 10

1. The screen will refresh and the **Activities** screen will be displayed.
2. In the calendar, navigate to the **date** you selected for the new activity.
3. A new **red square** with the new **Activity Type** can be seen in this date.
4. Tap on the date.



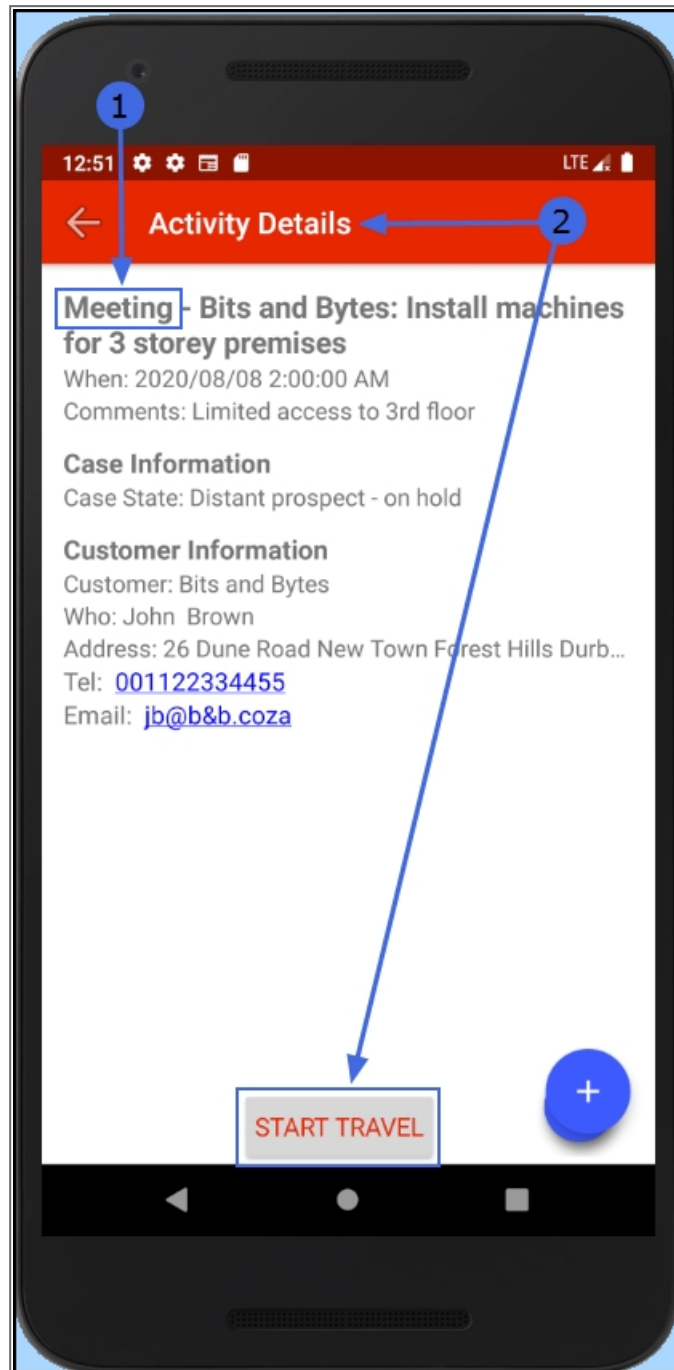
1. A 'quick view' of the new activity will pop up. It has been successfully added to the calendar.
2. Tap anywhere on the calendar, outside of the 'quick view' text box, to return to the **Activities** screen.



## THE START TRAVEL BUTTON

Sales Connect allows you to link **travel time** directly to your **Meeting** activities.

1. Firstly, ensure that you have selected a **Meeting** activity.
2. In the Activity Details screen, tap on the **Start Travel** button.



## ***The Start Travel Screen***

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1. The **Start Travel** screen will open.

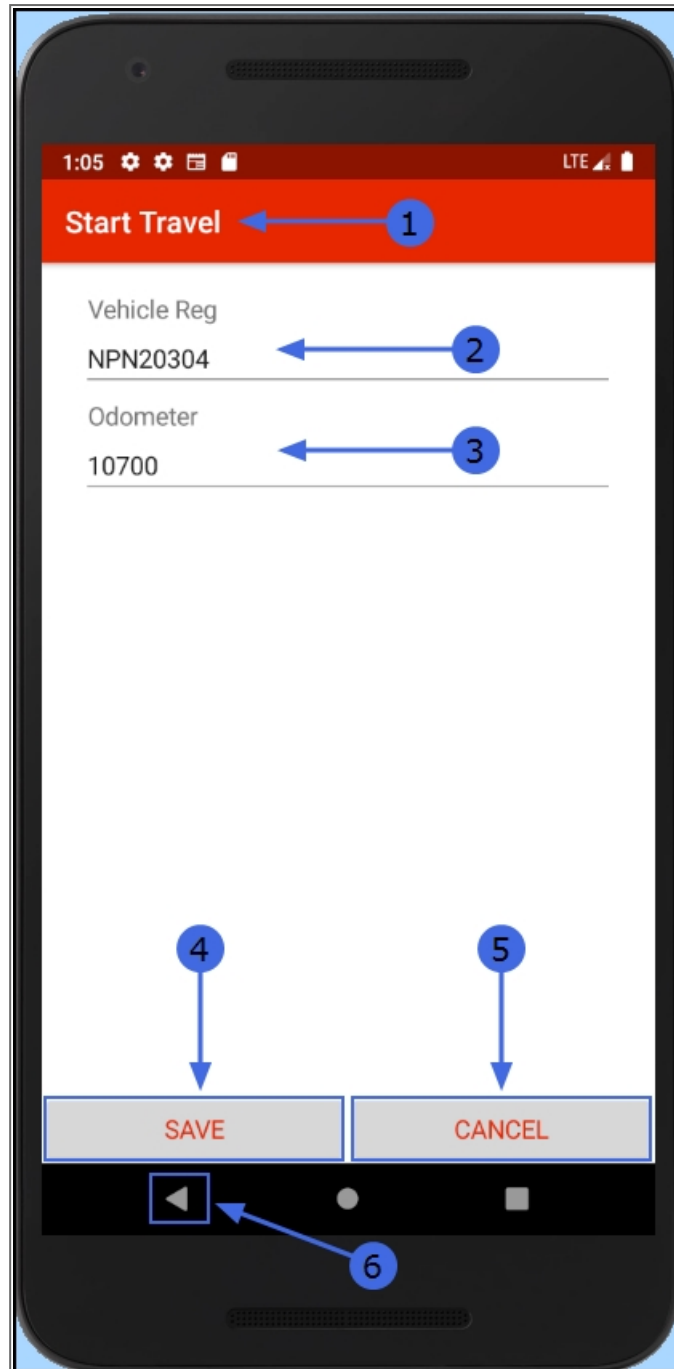
Type in:

2. your **vehicle registration number** and
3. your **odometer start reading** and
4. *Either*, select to **Save** the details,
5. *Or*, tap on **Cancel** to void any changes and return to the Activity Details screen.

For more information refer to [Activity Start Travel](#).

6. Click on **Back** to return to the **Activity Details** screen.





### Related Topics

- [Sales Connect - Introduction and Index](#)
- [Sales Connect - Download and Log In / Out](#)

- [Sales Connect - Edit Activity Details](#)
- [Sales Connect - Add Image / Photo to an Activity](#)
- [Sales Connect - Add Notes to an Activity](#)
- [Sales Connect - Link Start and End Travel to an Activity](#)
- [CRM](#)

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