

SALES CONNECT

EDIT ACTIVITY DETAILS

In Sales Connect, as in CRM, an activity is any type of interaction that involves your customer, for example:

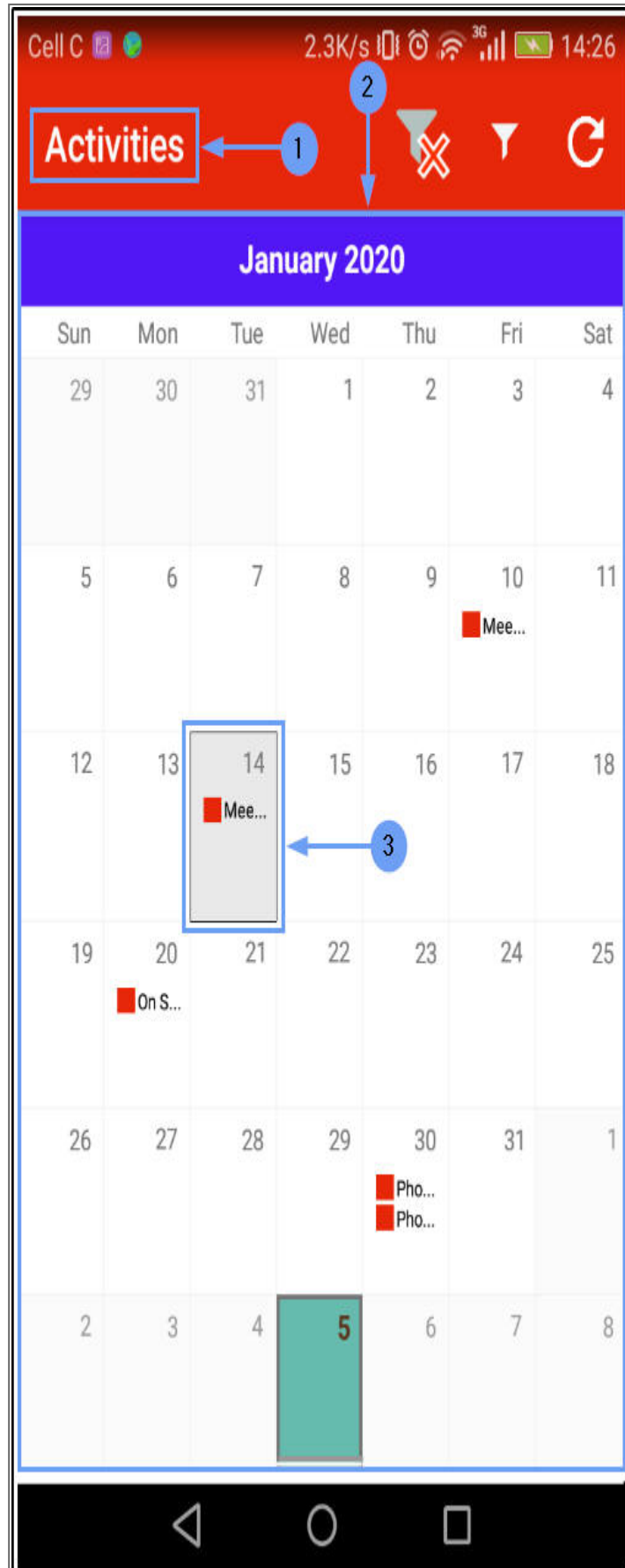
- A **Meeting**
- An **On-site Inspection**
- A **Call**
- An **Email**

These Activities can be configured according to your company requirements.

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

SELECT ACTIVITY

1. After [initial login](#) to Sales Connect 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.
3. Tap on the **date** that contains the Activity that you wish to edit.



Cell C

0.9K/s

14:37

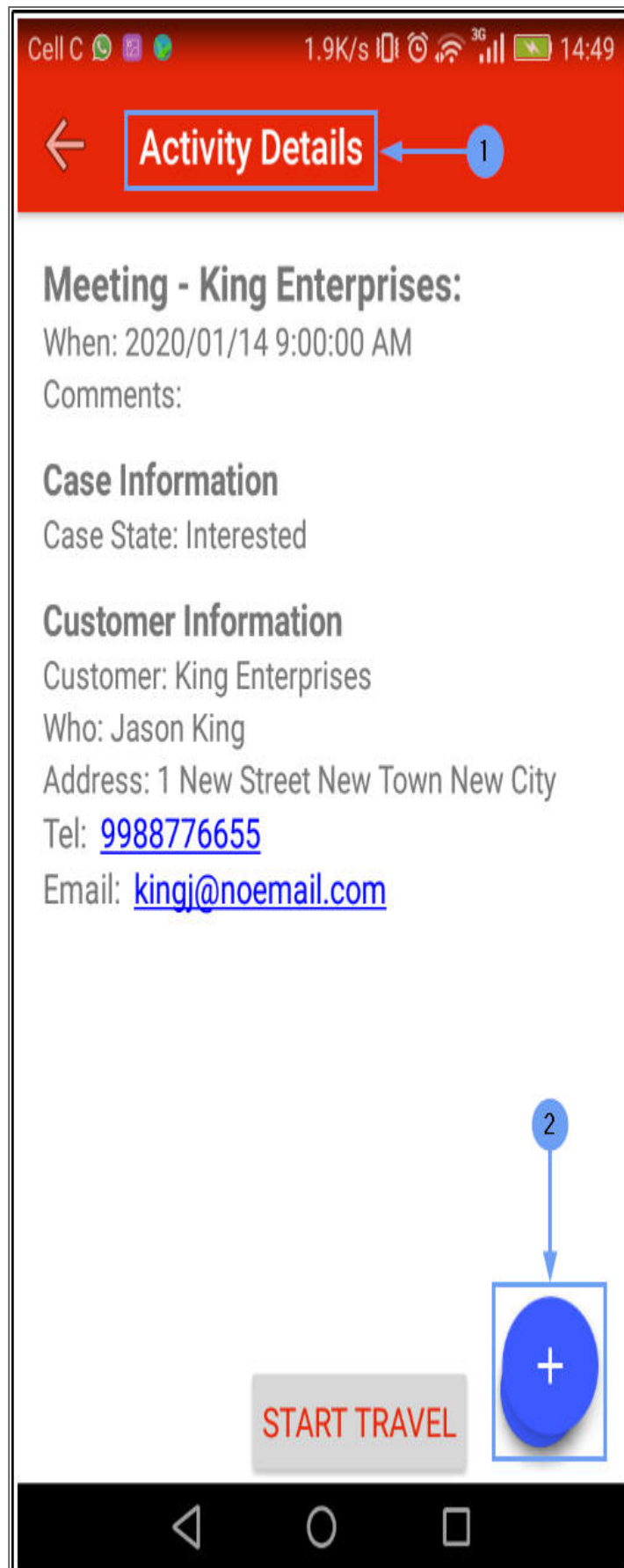
Activities

January 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
5	6	7	8	9	10	11
					Mee...	
12	13	14	15	16	17	18
		Mee...				
<div> <div>9:00 AM</div> <div>11:00 AM</div> <div>Meeting - King Enterprises:</div> </div>						
19	20	21	22	23	24	25
	On S...					
26	27	28	29	30	31	1
				Pho...	Pho...	
2	3	4	5	6	7	8

THE ACTIVITY DETAILS SCREEN

1. The **Activity Details** screen will be displayed.
2. Tap on the **Expand** icon.



Cell C 1.9K/s 3G 14:49

← **Activity Details** 1

Meeting - King Enterprises:
When: 2020/01/14 9:00:00 AM
Comments:

Case Information
Case State: Interested

Customer Information
Customer: King Enterprises
Who: Jason King
Address: 1 New Street New Town New City
Tel: [9988776655](tel:9988776655)
Email: kingj@noemail.com

2

START TRAVEL

+

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

RESCHEDULE THE ACTIVITY

2. Tap on **reschedule activity**.

Cell C

1.9K/s

3G

15:16

←

Activity Details

Meeting - King Enterprises:

When: 2020/01/14 9:00:00 AM

Comments:

Case Information

Case State: Interested

Customer Information

Customer: King Enterprises

Who: Jason King

Address: 1 New

Tel: [998877665](tel:998877665)

Email: kingj@no

1 →

2 ↓

reschedule activity

add photo

add notes

START TRAVEL

×

1. The **Reschedule Activity** screen will open.
2. Here you have the option to edit/update **3** points of the Activity:
 - i. Schedule **Date**
 - ii. Schedule **Time**
 - iii. Schedule **End Time**

Reschedule Activity Date

3. Tap on the **Schedule Date**.

Note that the original date is **14.01**

Cell C 4.6K/s 3G 11:02

Reschedule Activity 1

Schedule Date
Tue, 14.01 3

Schedule Time
09:00 AM

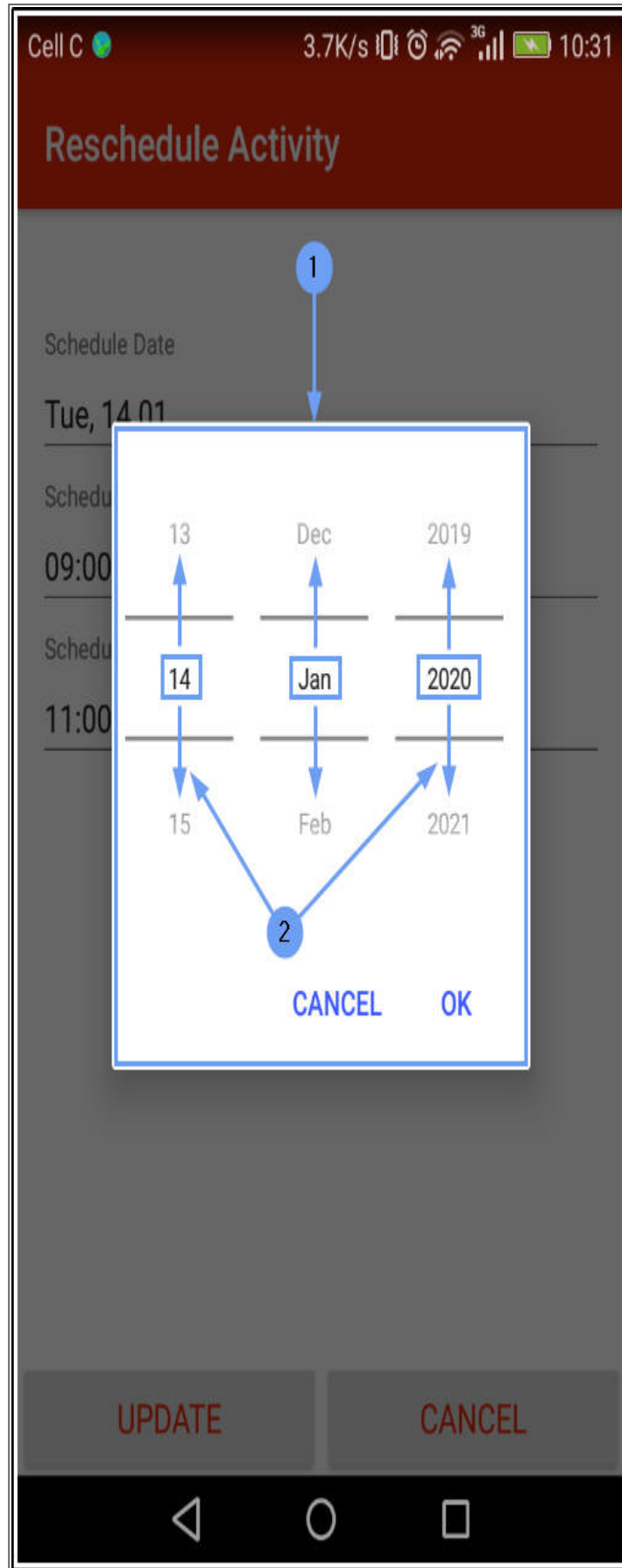
Schedule End Time
11:00 AM

2

UPDATE CANCEL

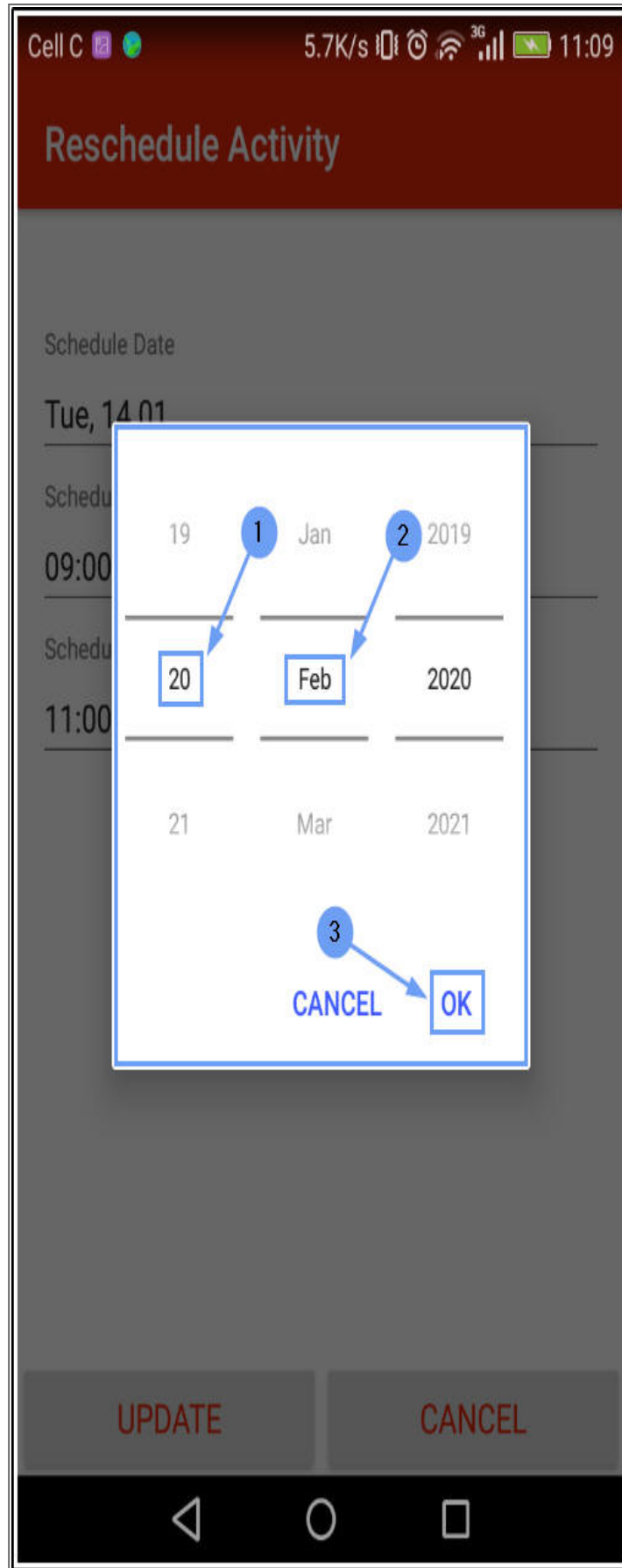
Navigation icons: back, home, recent apps

1. An interactive calendar will pop up displaying the original day, month and year of the Activity.
2. Scroll up or down to edit/update:
 - i. the **Day**
 - ii. the **Month**
 - iii. and / or the **Year**of the Activity.



In this example;

1. The **Day** has been changed to the **20th** (from the 14th).
2. The **Month** has been changed to **February** (from January).
3. When you have finished rescheduling the date, tap on **OK**.



The calendar will disappear from the screen.

1. The **Schedule Date** will have updated to the new date (**20.02**).
 - **Note:** If there is a lag between editing the date and tapping on **Ok** then Sales Connect may not register the change. You will then need to repeat the process more timeously.

Reschedule Activity Time

2. Tap on **Schedule Time**.

Cell C 638B/s 3G 11:21

Reschedule Activity

Schedule Date

Thu, 20.02

1

Schedule Time

09:00 AM

2

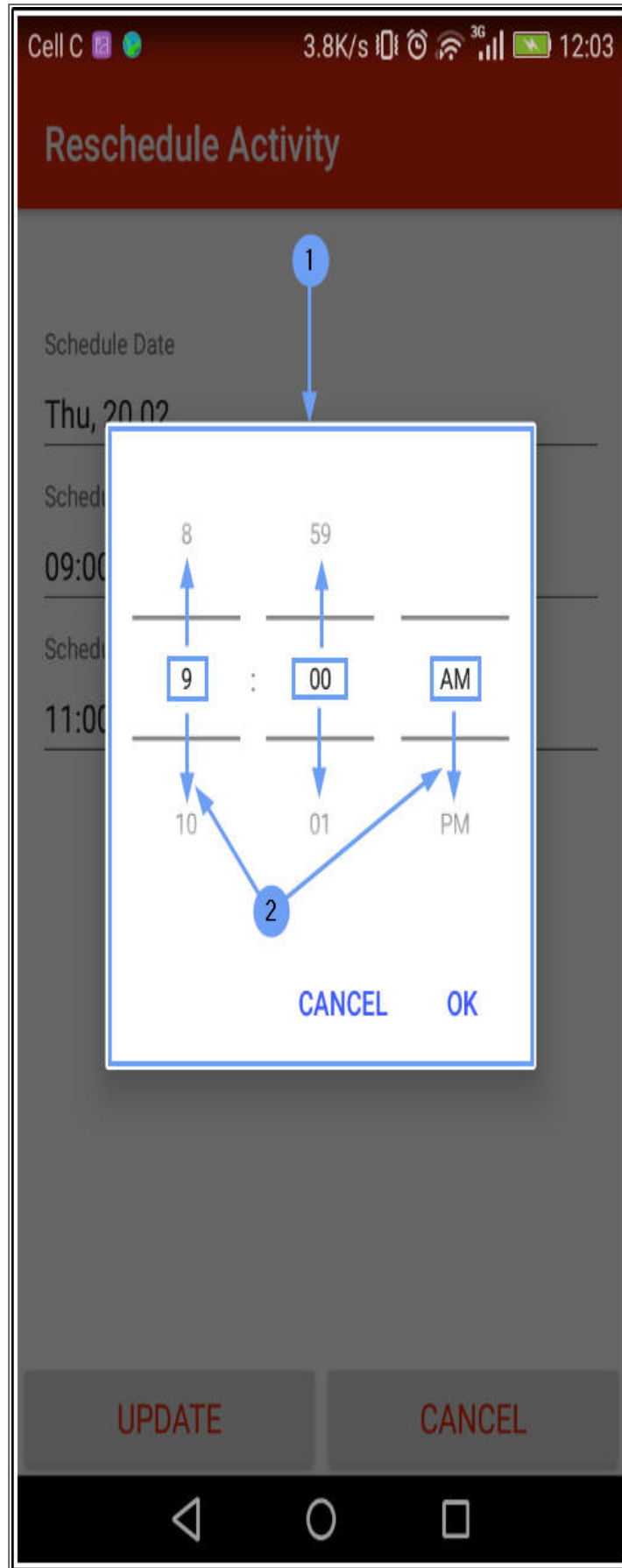
Schedule End Time

11:00 AM

UPDATE

CANCEL

1. An interactive clock will pop up displaying the original **start time** of the activity.
2. Scroll up or down to edit/update:
 - i. the **Hour**
 - ii. the **Minutes**
 - iii. and/or the **Period** (AM or PM)



In this example;

1. The **Hour** has been changed to **2** (from 9).
2. The **Minutes** have been changed to **30** from (00).
3. The **Period** has been changed to **PM** (from AM).
4. When you have finished rescheduling the time, tap on **OK**.

Cell C 3.6K/s 3G 12:19

Reschedule Activity

Schedule Date

Thu, 20 02

Schedule Time

09:00

Schedule Time

11:00

1 29 AM

2 30 PM

3

31

4

CANCEL

OK

UPDATE

CANCEL

The clock will disappear from the screen.

1. The **Schedule Time** will have updated to the new time (**02.30PM**).
 - **Note:** If there is a lag between editing the time and tapping on **OK** then Sales Connect may not register the change. You will then need to repeat the process more timeously.

Reschedule Activity End Time

2. Tap on the **Schedule End Time**.

Cell C 8.1K/s 12:57

Reschedule Activity

Schedule Date

Thu, 20.02

Schedule Time

02:30 PM

Schedule End Time

11:00 AM

UPDATE

CANCEL

1. An interactive clock will pop up again displaying the original **end time** of the activity.
2. Scroll up or down to edit / update:
 - i. the **Hour**
 - ii. the **Minutes**
 - iii. and / or the **Period** (AM or PM)

Cell C 1.5K/s 3G 13:05

Reschedule Activity

1

Schedule Date

Thu, 20 02

Sched

02:30

Sched

11:00

10

59

11

:

00

AM

12

01

PM

2

CANCEL

OK

UPDATE

CANCEL

In this example;

1. The **Hour** has been changed to **3** (from 11).
2. The **Minutes** have been changed to **30** from (00).
3. The **Period** has been changed to **PM** (from AM).
4. When you have finished rescheduling the **end time** , tap on **OK**.

Cell C 1.3K/s 3G 14:02

Reschedule Activity

Schedule Date

Thu, 20 02

Sched

02:30

Sched

11:00

1

2

3

AM

3

:

30

PM

4

31

4

CANCEL

OK

UPDATE

CANCEL





The clock will disappear from the screen.





1. The **Schedule End Time** will have updated to the new time (**03.30PM**).

- **Note:** If there is a lag between editing the end time and tapping on **OK** then Sales Connect may not register the change. You will then need to repeat the process more timeously.

SAVE CHANGES

2. When you have finished editing the activity details,
3. Tap on **Update**.

Cell C    

2.9K/s     14:07

Reschedule Activity

Schedule Date

Thu, 20.02

Schedule Time

02:30 PM

Schedule End Time

03:30 PM

1

2

3

UPDATE

CANCEL

You will return to the Activity Details screen.

1. The activity **Date** and **Schedule Time** will be updated in this screen.

VIEW ACTIVITY UPDATE IN CALENDAR

2. Tap on the **Back** arrow at the top of the screen or
3. the **Back** arrow at the foot of the screen.

Cell C

2

3K/s

3G

15:45

←

Activity Details

Meeting - King Enterprises:

When: 20 Feb 2020 02:30 PM

1

Comments:

Case Information

Case State: Interested

Customer Information

Customer: King Enterprises

Who: Jason King

Address: 1 New Street New Town New City

Tel: [9988776655](tel:9988776655)

Email: kingj@noemail.com

3

START TRAVEL

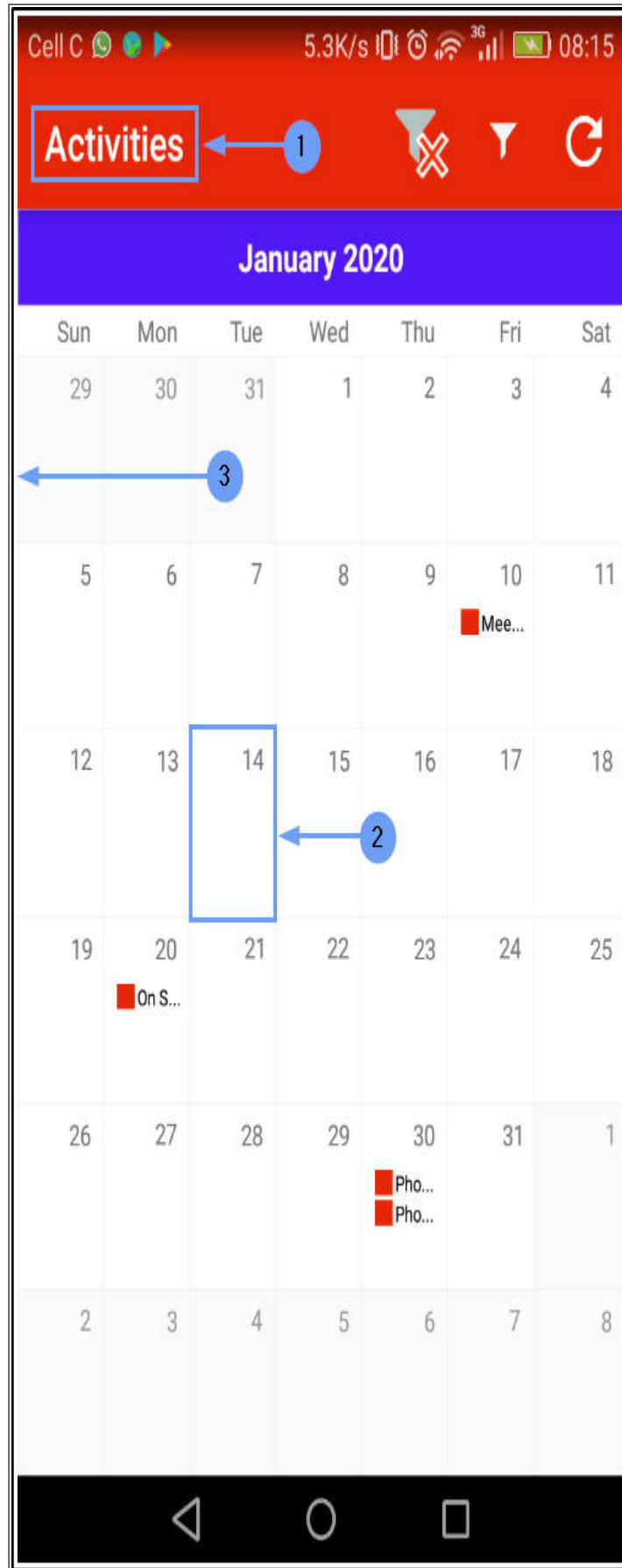
+

◀

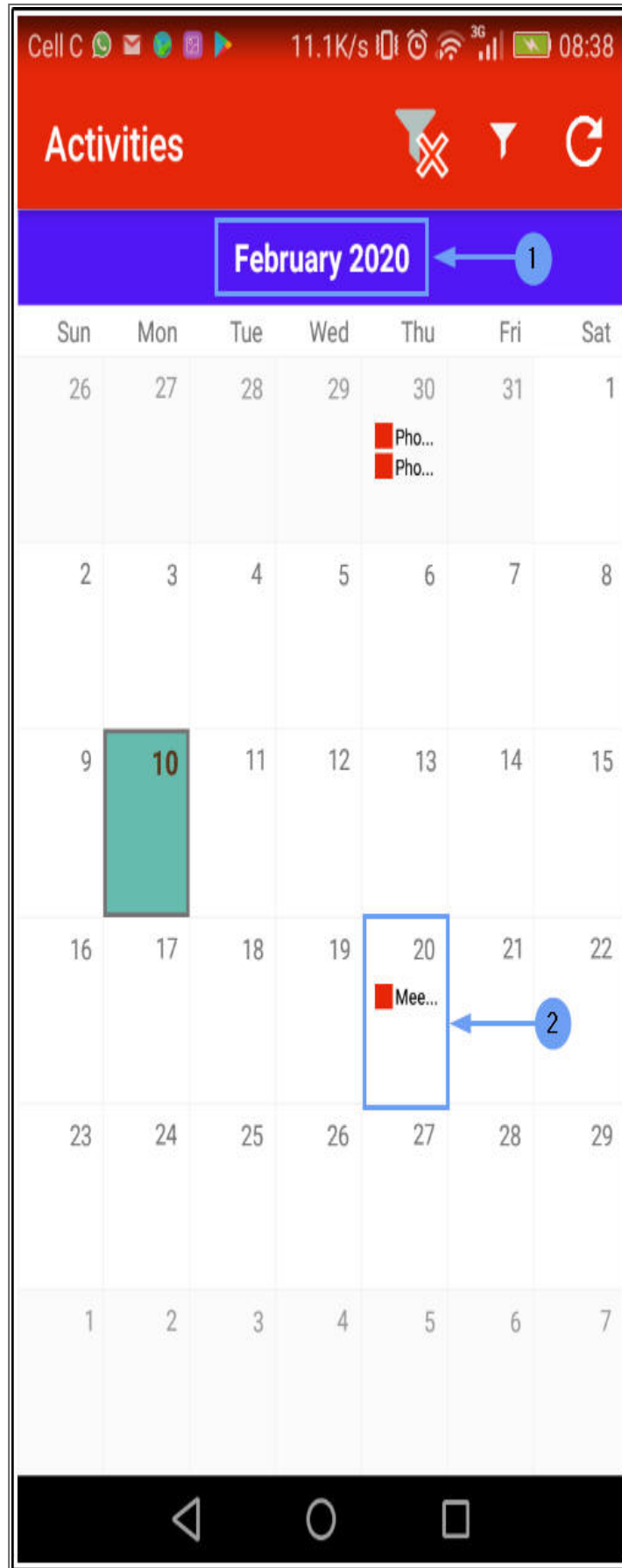
○

□

1. You will return to the **Activities** screen.
2. The activity that you rescheduled will no longer be showing on the original date (14th January).
3. Scroll left to view the next month.



1. The screen will display the calendar for the following month.
2. You can see the activity is now linked to the rescheduled date (20th February).



VIEW ACTIVITY UPDATE IN CRM

1. Log in to the **CRM Dashboard**
2. Select the **Calendar** tab.
3. Ensure that you are viewing the correct week/month that you expect to see your rescheduled activity.
4. The changes made in **Sales Connect** will have auto updated **CRM**.
 - Here you can see the activity is now set for 20th February.

Example Company

Abigail Milne

Dashboard

Search

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Email	30	0	0
Meeting	20	0	0
On Site inspection	20	0	0
Phone call	20	1	0

1 Month Performance

Category	Value
Cases	15,000.00
Invoices	18,000.00
Orders	0.00
Quotes	0.00

4 Month Pipeline

Month	Value
Feb 2020	200.00
Mar 2020	0.00
Apr 2020	0.00
May 2020	0.00

15 Oct 2019 19

19

12

75

13

11

15

148

8

create cold call

recommendations

warnings

customers

cases

activities

quotes

equipment

3rd party

Today

Recent

Calendar

<

>

January - February 2020

Day

Work Week

Week

Month

Timeline

Agenda

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
19 January	20	21	22	23	24	25
26	27	28	29	30	31	01 February
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
				King Enterpri...		

companion application

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Related Topics

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