SALES CONNECT

LINK IMAGE OR PHOTO TO AN ACTIVITY

You can link an image directly to an **Activity Case** in Sales Connect. This image will pull through to the **Case** section of the Save Activity page in **CRM** where it can be downloaded, viewed, edited or deleted, as required.

SELECT THE 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 link an **image** to.

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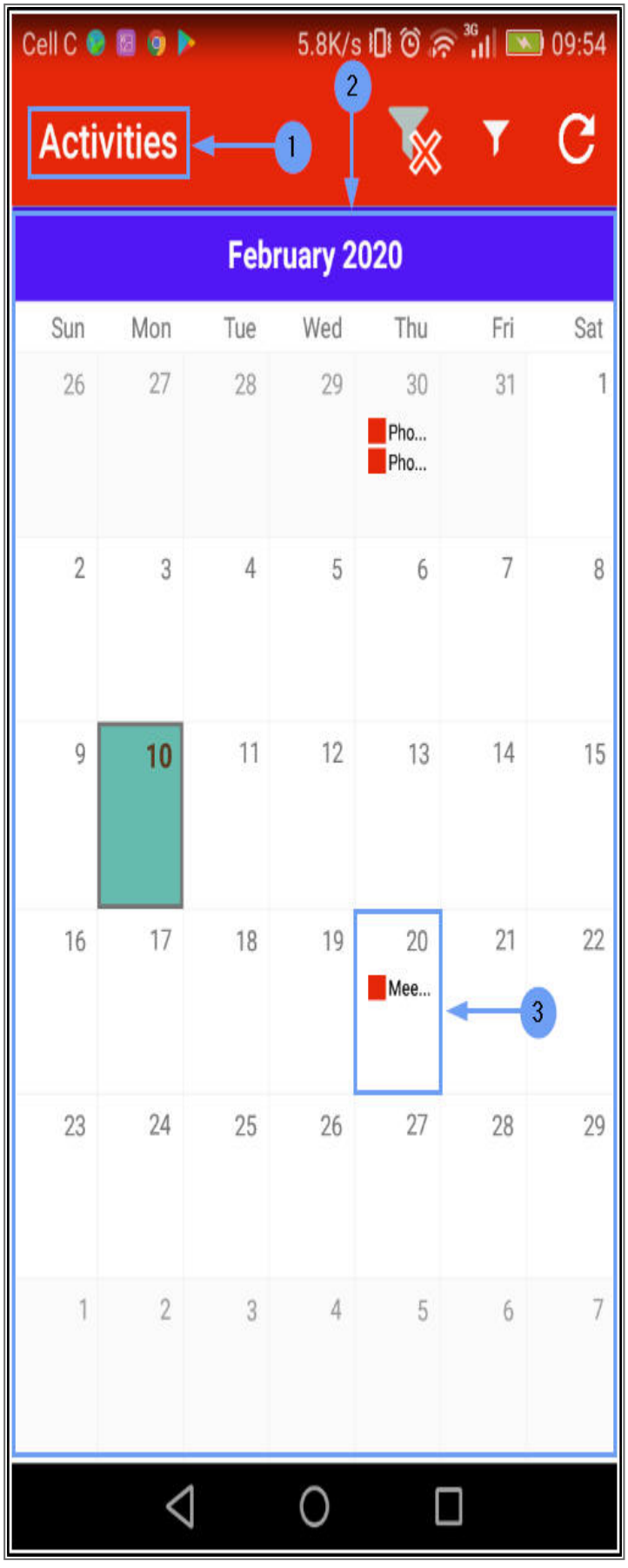

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1. A **text box** will pop up with more information regarding the activity.
2. Tap on this text box.

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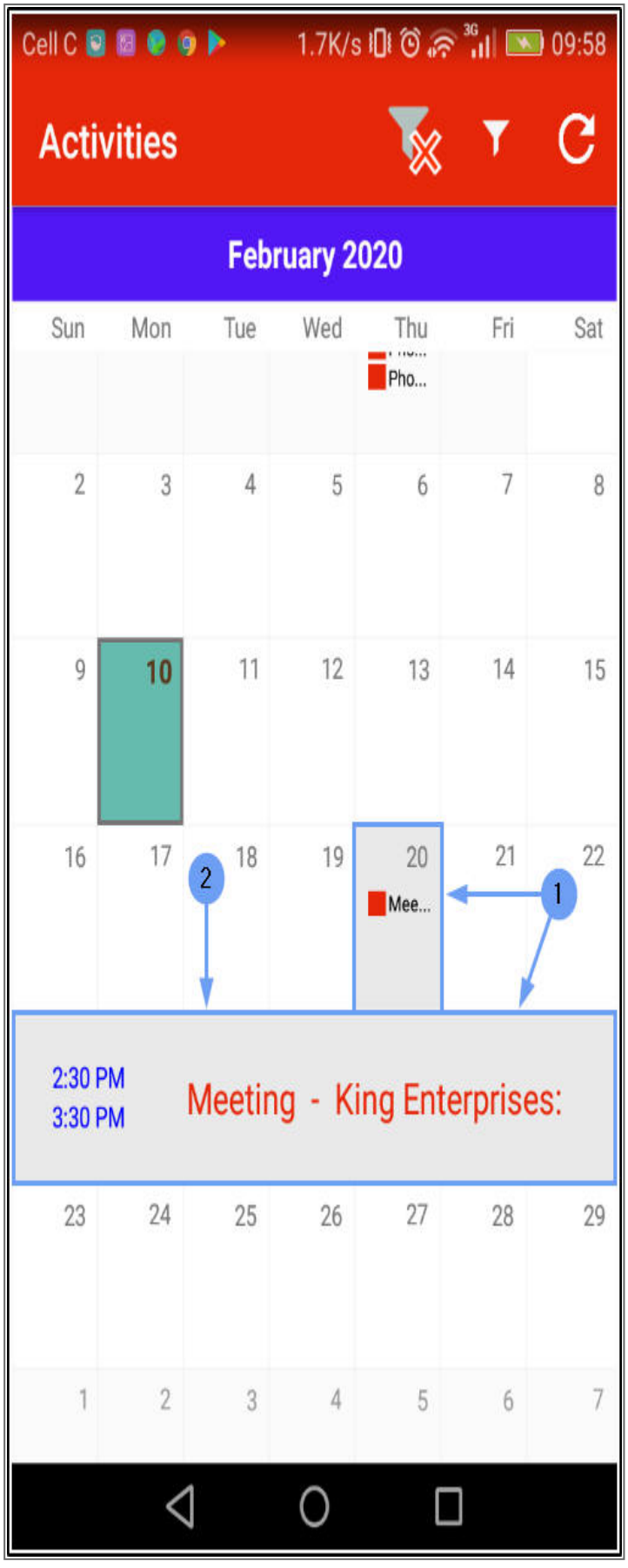

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THE ACTIVITY DETAILS SCREEN

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

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THE ACTIVITY EDIT BUTTONS

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

ADD PHOTO

2. Tap on **add photo**.

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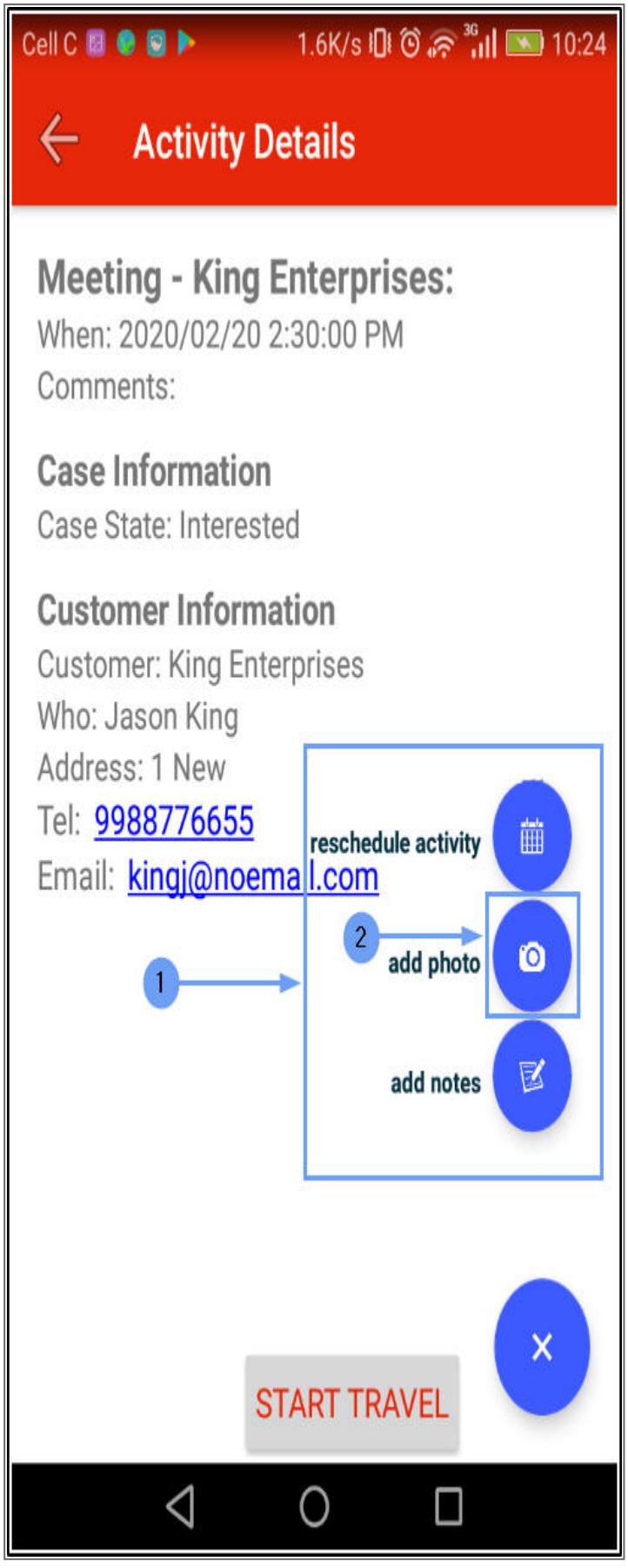

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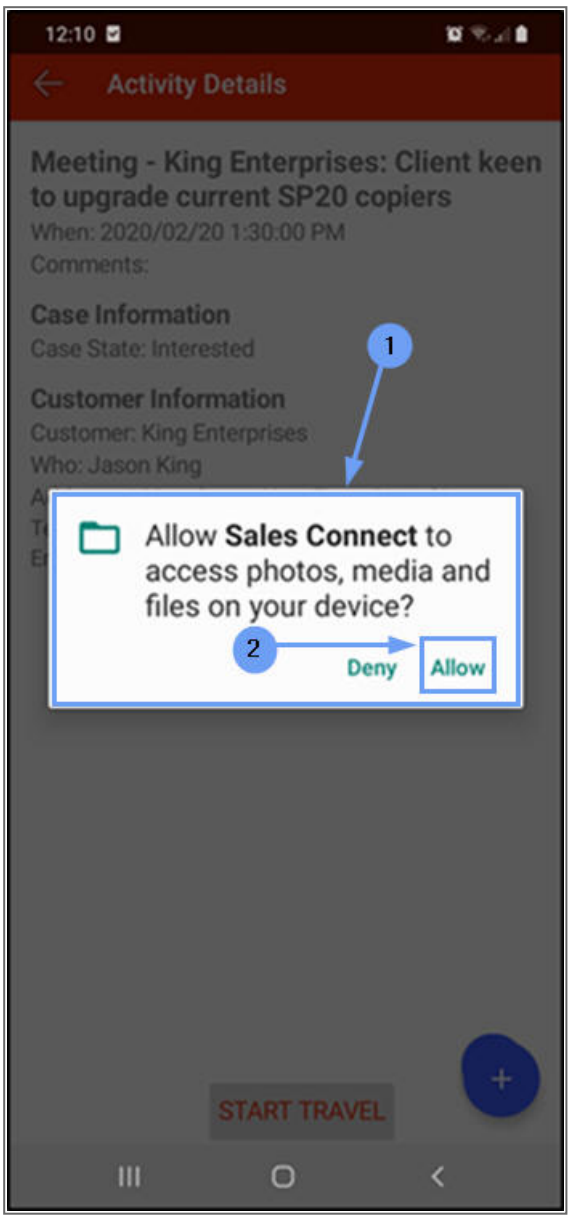
1. An **Access** message box may pop up in this screen asking;
    - *Allow Sales Connect to access photos, media and files on your device?*
2. Tap on **Allow**.



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I. SELECT IMAGE SOURCE - GALLERY

1. An **Image Source** message box will pop up asking;
    - *Would you like to take a picture with the Camera or choose an existing image from your Gallery?*
2. Tap on **Gallery**.

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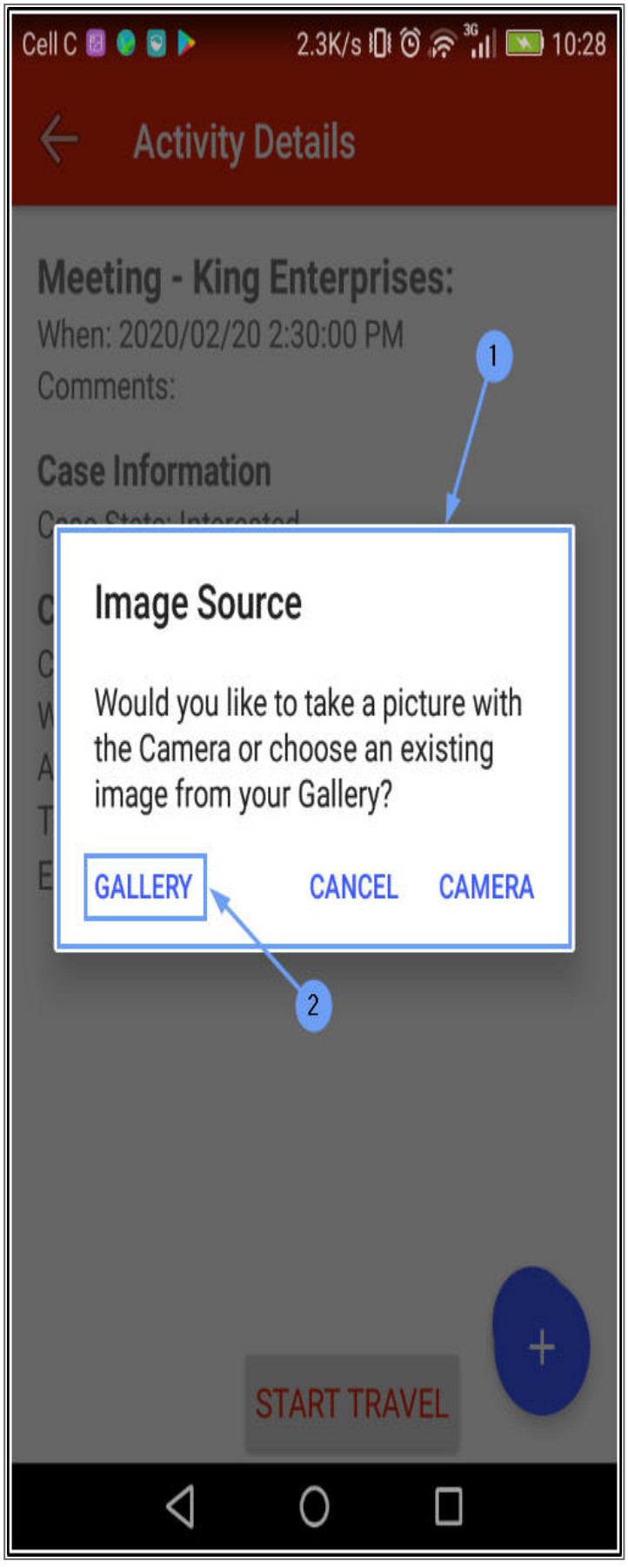

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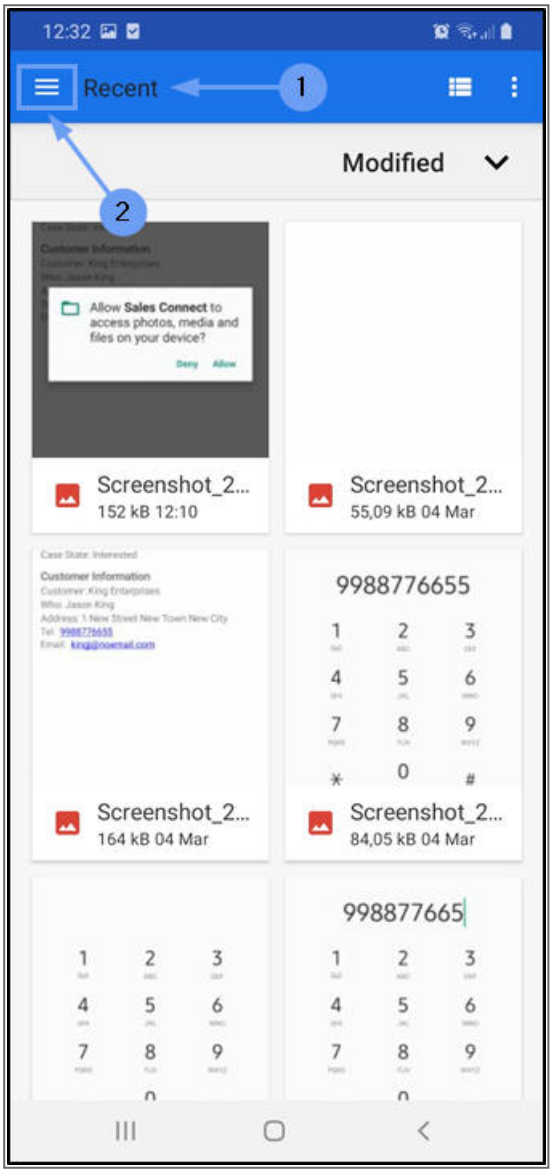
1. For convenience, the **Recent** screen will open with the most recently taken images displayed.

II. SELECT IMAGE FROM OTHER SOURCES

You will have the option to select images from other sources depending on the contents of your device.

2. Tap on the **menu** button.



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1. The **Open from** screen will be displayed.
2. There are 4 different image sources linked to this particular device:
    - **Images**
    - **Recent**
    - **Downloads** and
    - **SD card**
3. In this example, **Images** is selected.

1. The **Images** screen will open.

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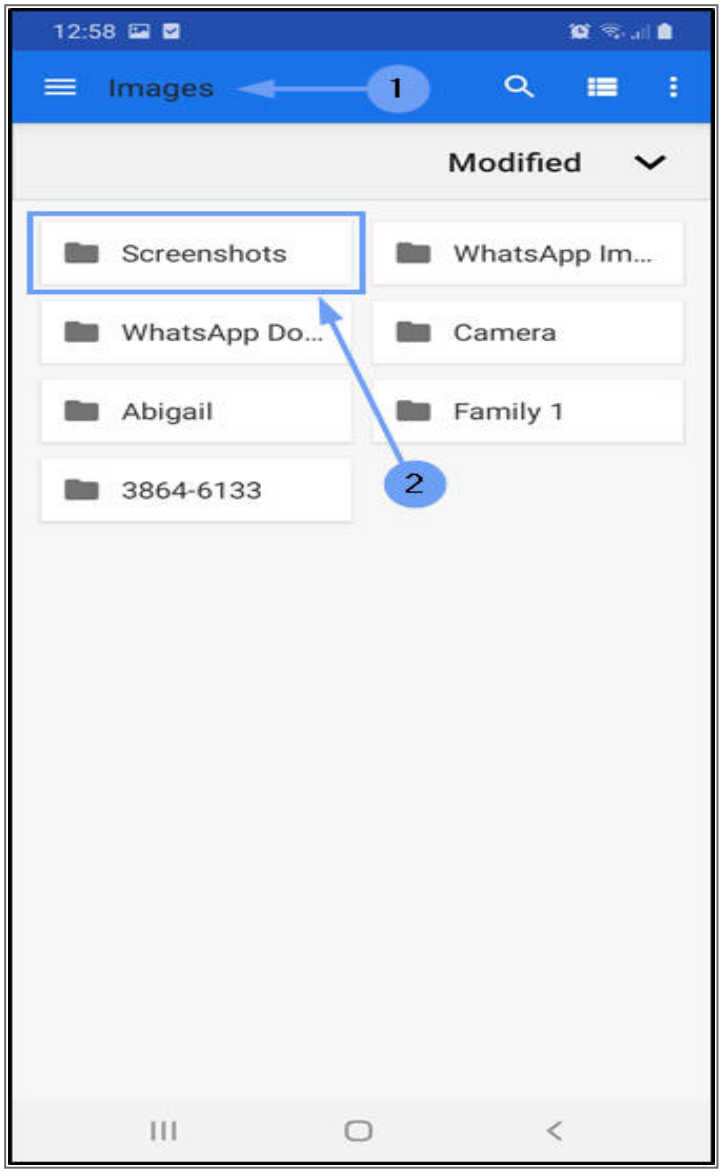
Select Image Folder

You will have the option to select images from different folders - depending on the contents of your device.

2. Tap on the selected folder - in this example, **Screenshots**.



1. The **Screenshots** screen will open with the most recent screenshots - that have been uploaded to your device - displayed first.

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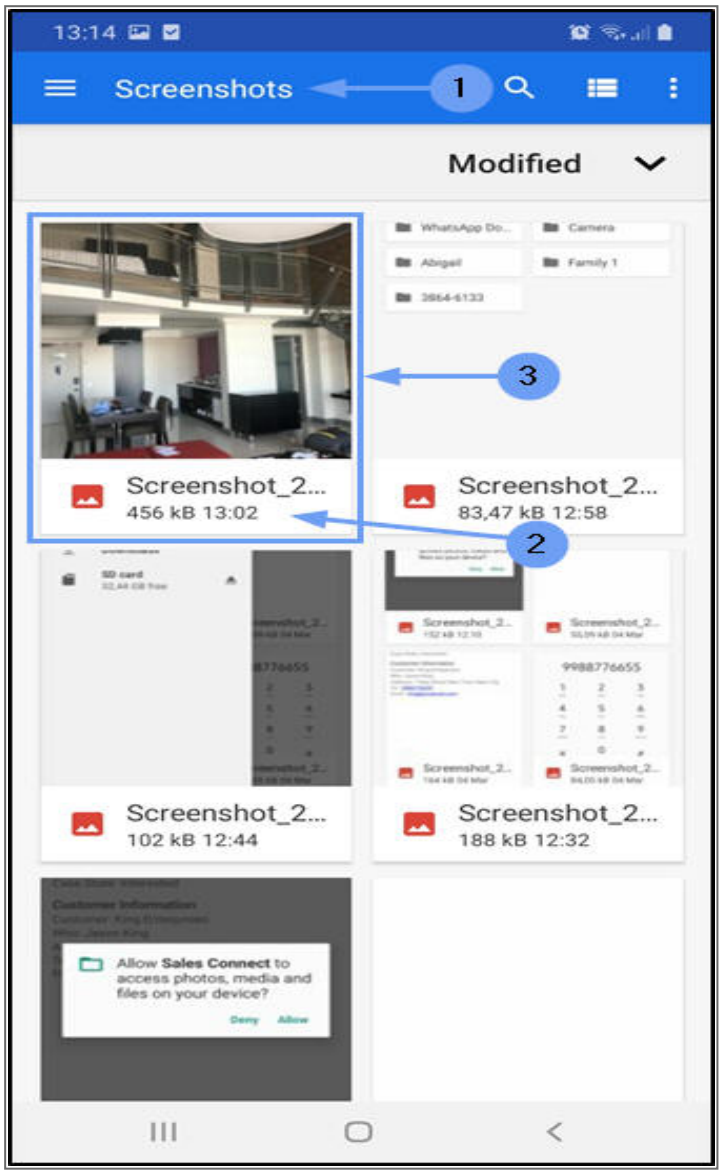
2. The **Time** and **File Size** will be listed at the foot of each image.

Select Image

3. Tap on the **image** that you wish to link to your selected activity.



1. Process under construction...
2. Text...
3. Text...

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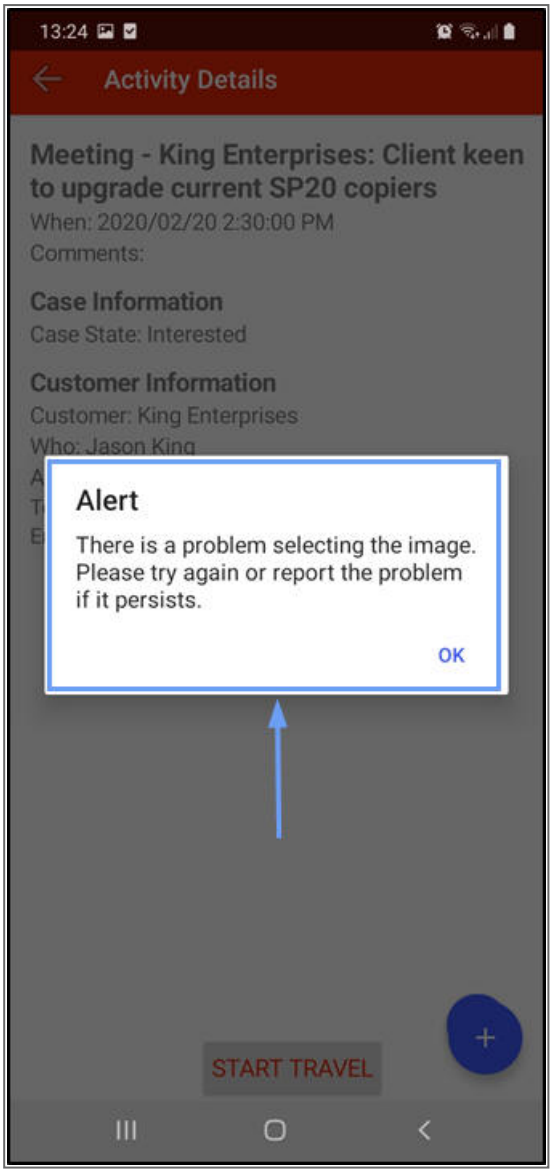

1. Process under construction...
2. Text...
3. Text...

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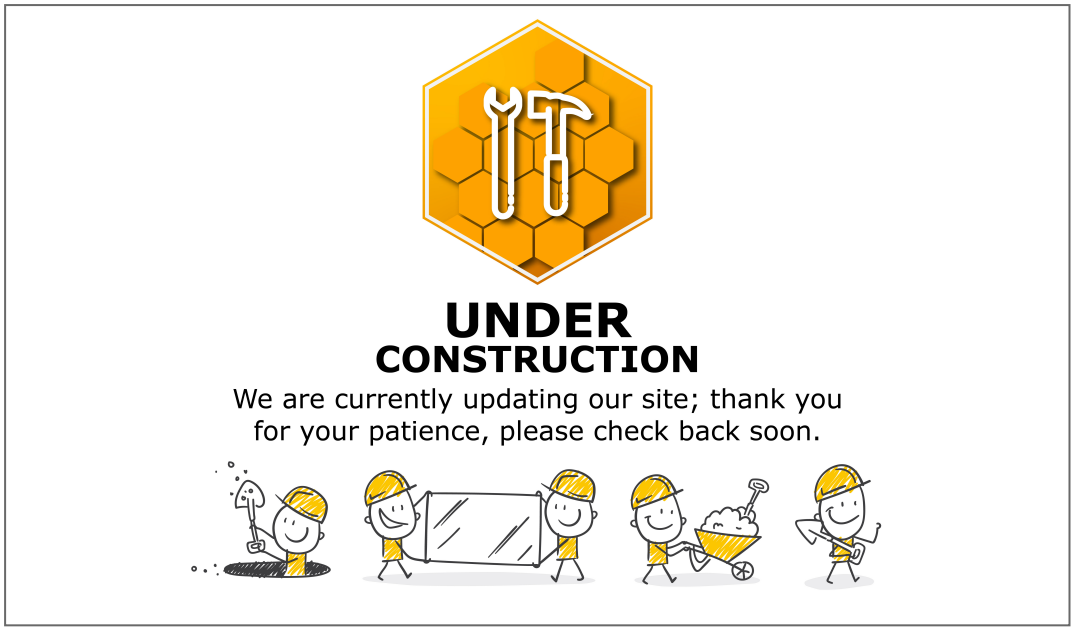
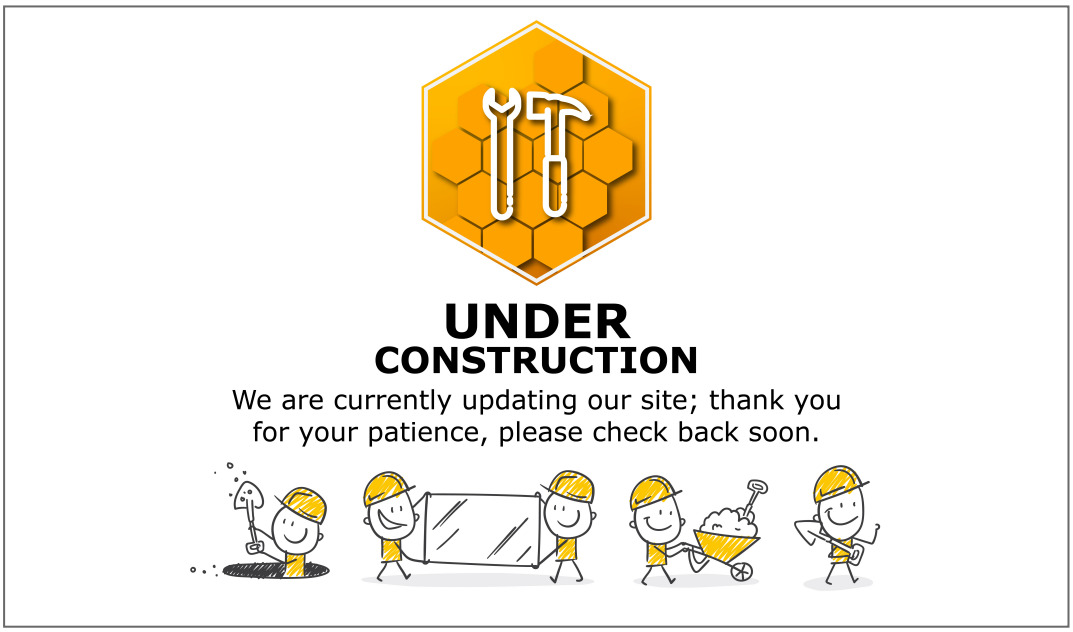


1. Process under construction... .
2. Text...
3. Text...



iii. Select Image Source - Camera

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1. In the Activity Details screen, after you have selected add photo,
2. the **Image Source** message box will pop up.
3. Select **Camera**.

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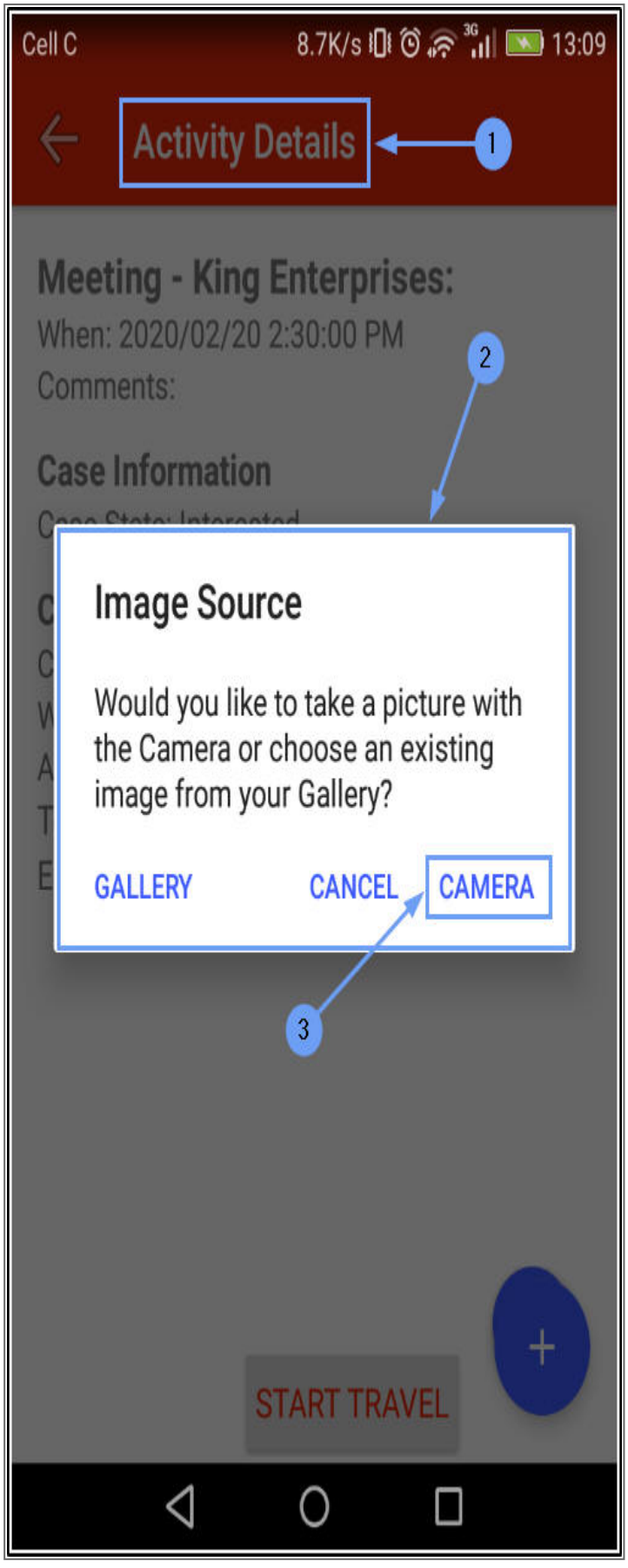

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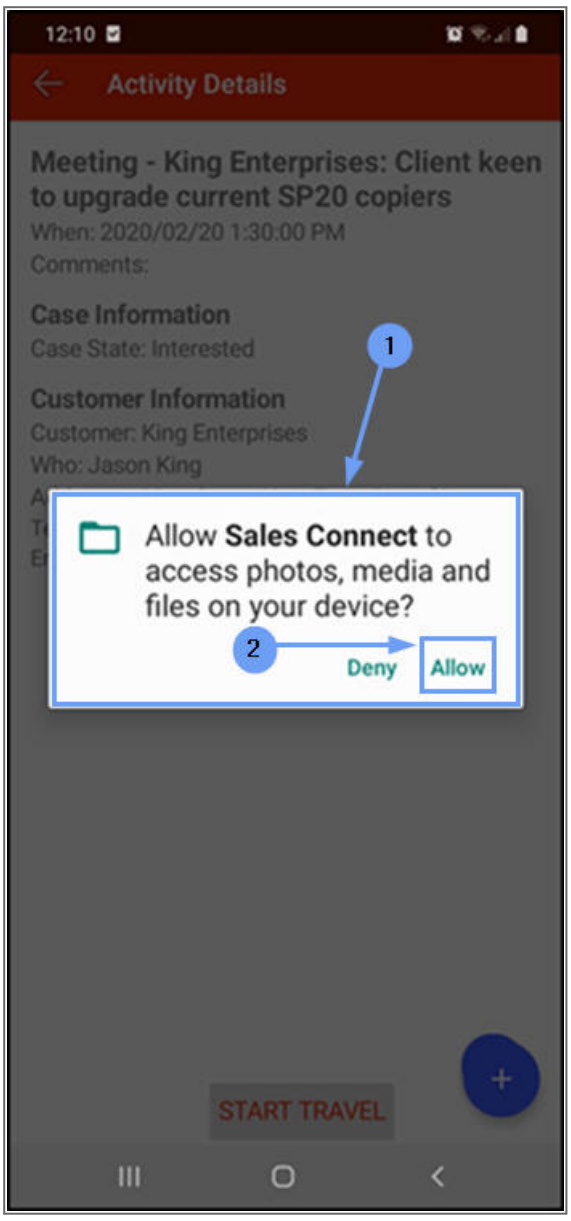
1. A message box may pop up in this screen asking;
    - *Allow Sales Connect to access photos, media and files on your device?*

2. Tap on **Allow**.



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The Camera Capture Screen

- The **Capture** screen will open on your device.
- When you have selected the scene that you wish to record/-photograph, tap on **Capture**.

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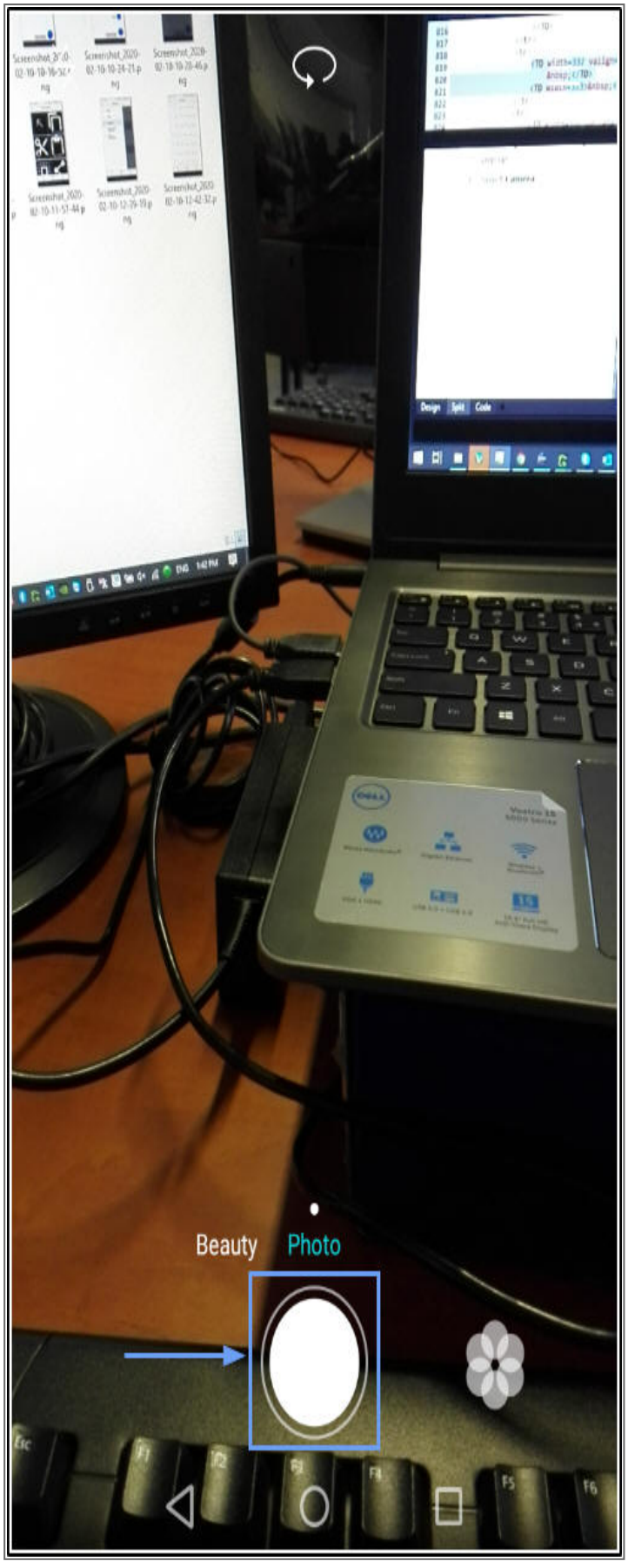

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- Your captured image will be displayed on the screen.

SAVE IMAGE

- Tap on the **Save/OK** button (specific to your device).

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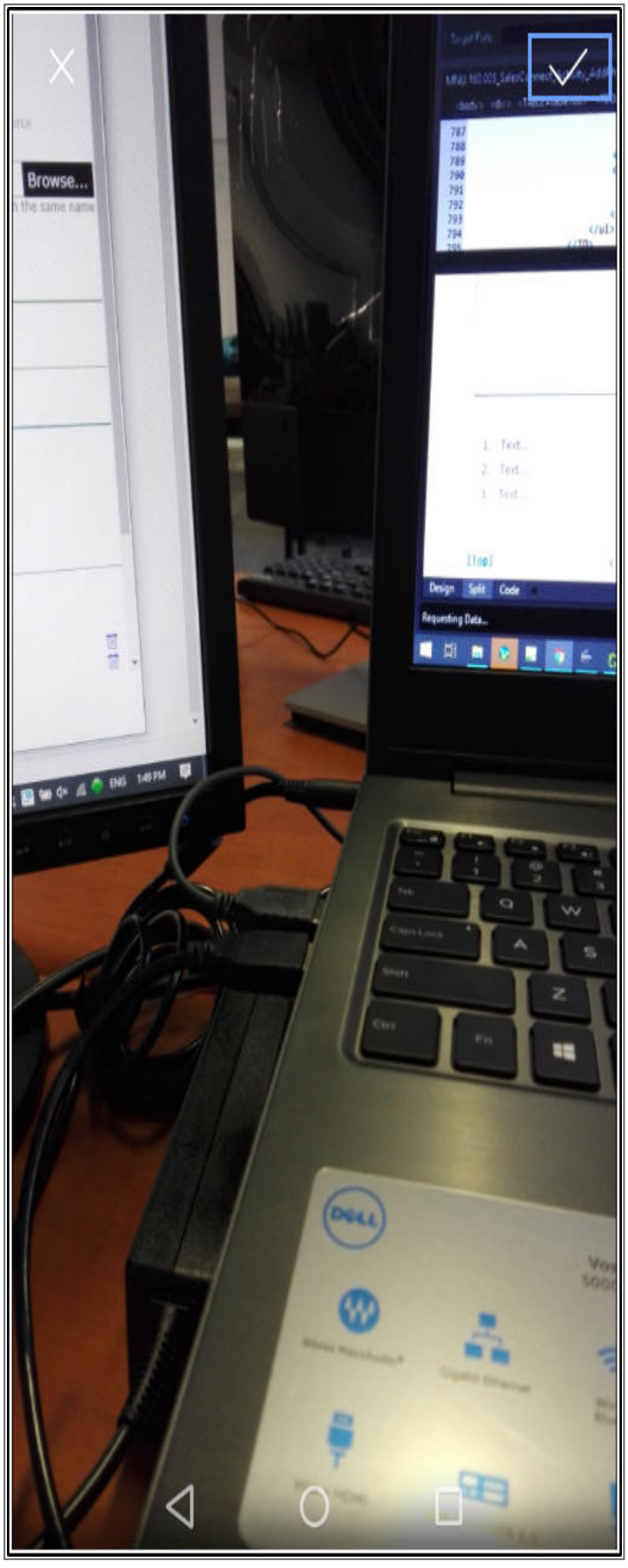

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- Your image will be linked to the selected activity in CRM and you will return to the **Activity Details** screen.

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VIEW LINKED IMAGE IN CRM

1. Log in to your **CRM Dashboard**.
2. Select the **Activities** tile.

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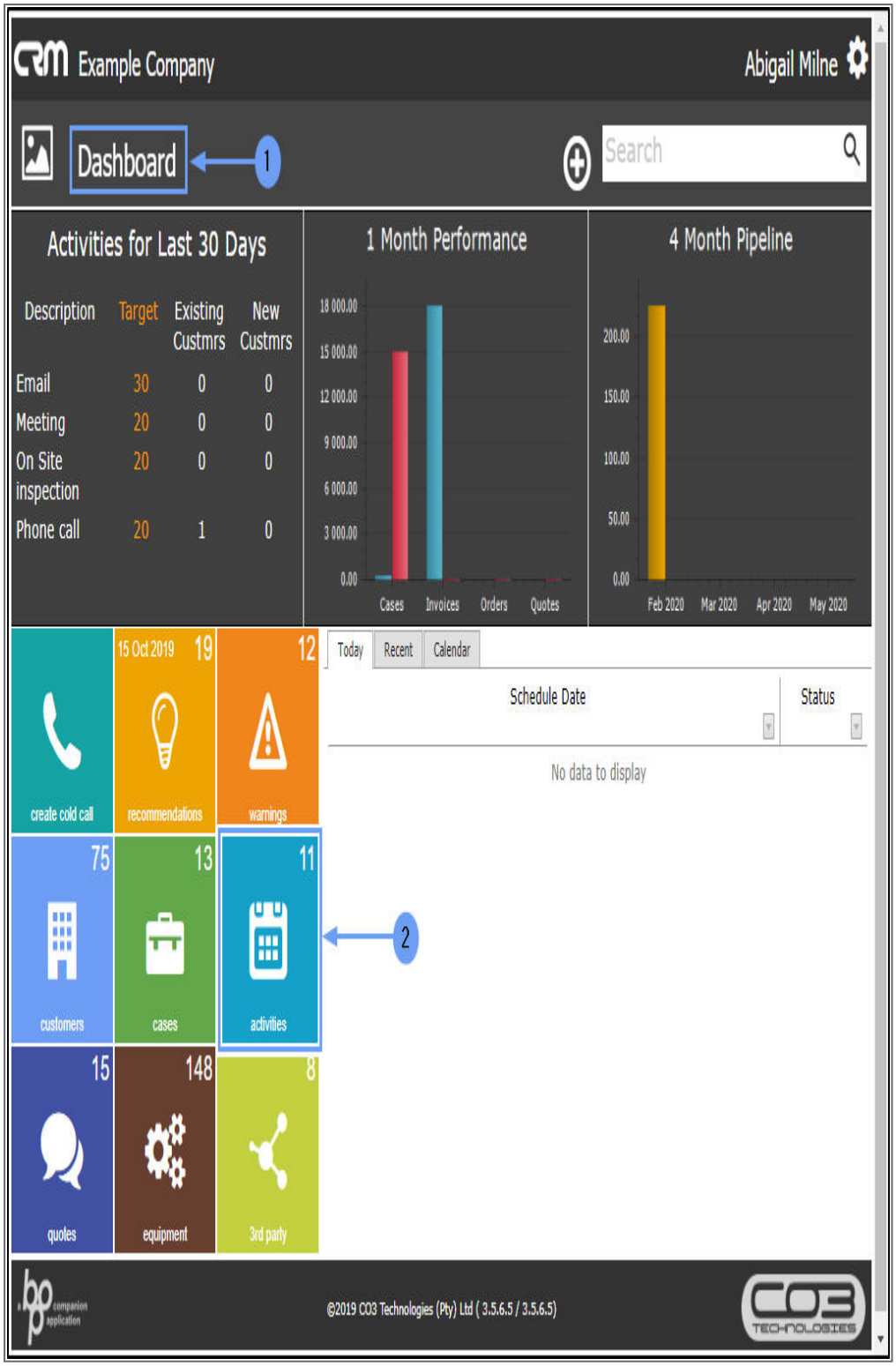

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1. The **My Activities** page will open.
2. Hover over the Activity (that is linked to the image) until the **Actions buttons** are displayed.
3. Select **View/Edit this Activity**.

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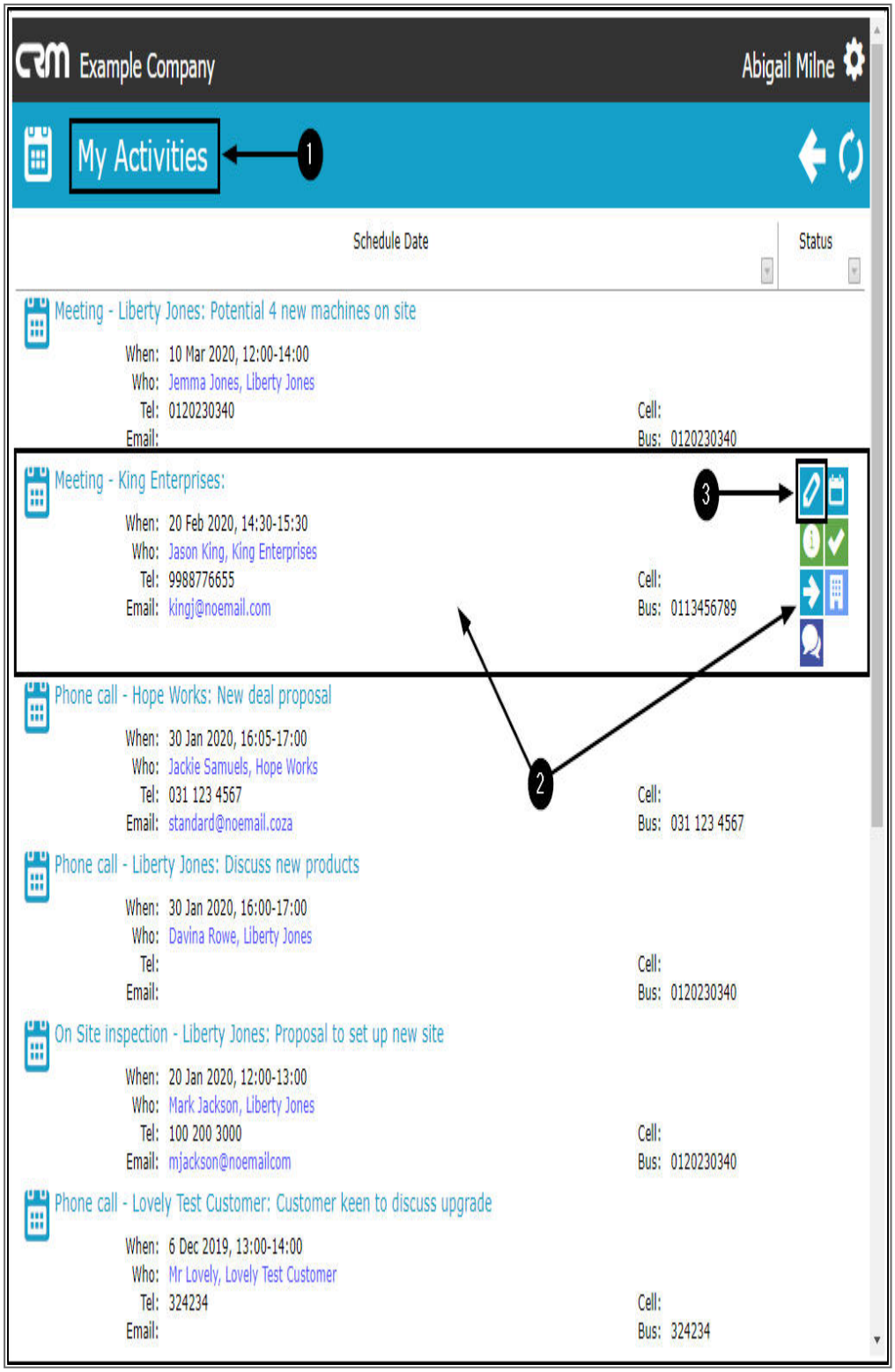

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1. The **Save Activity** page will open.
2. Expand the **Case** section.

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1. You can now view more details regarding the Case.
2. Go to the **Attachments** section.
3. You can see that a file is linked to this activity, click on the **file name**.

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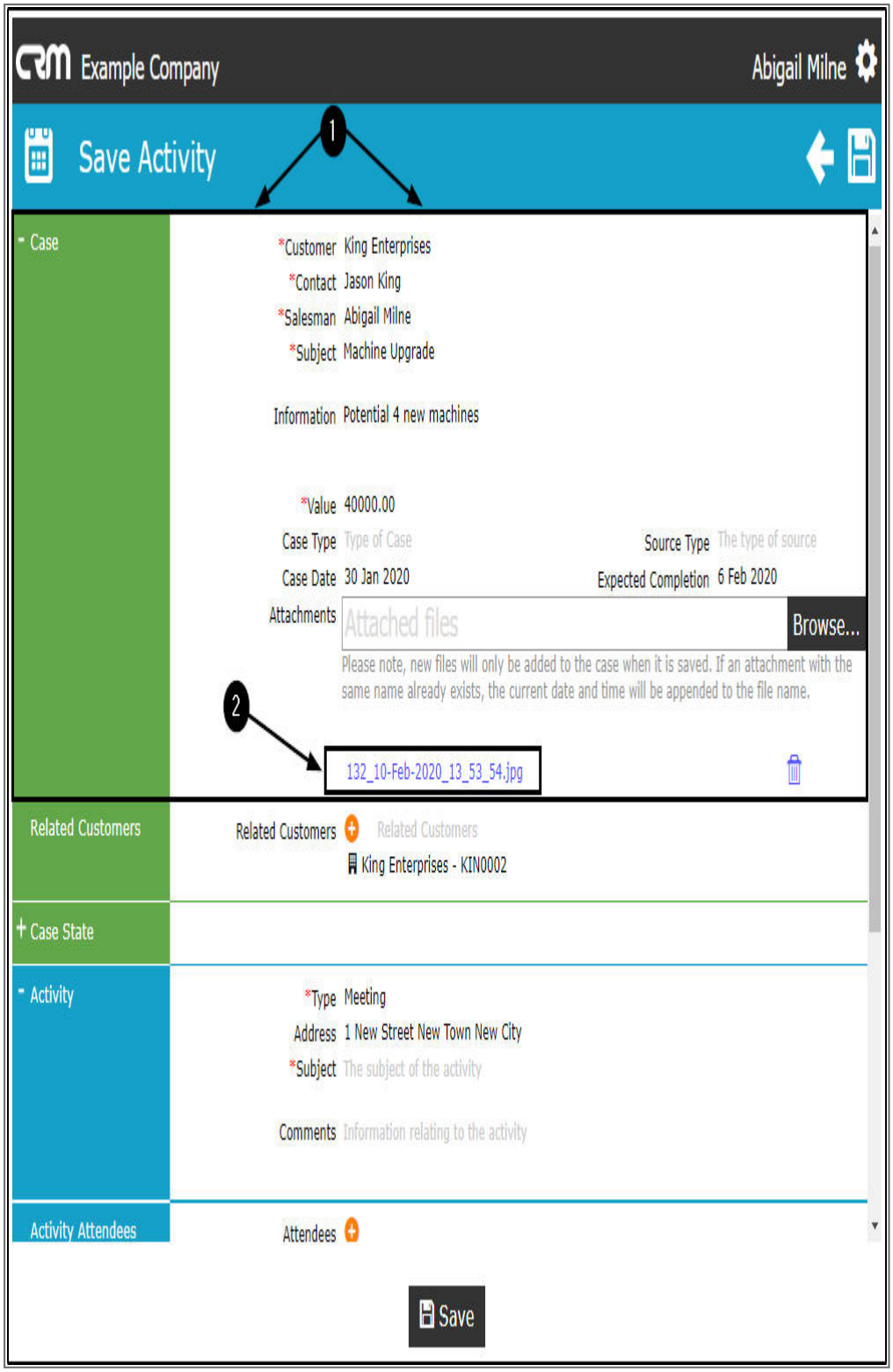

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1. In the bottom left of the page, a **download notification box** will appear. Click on this box.

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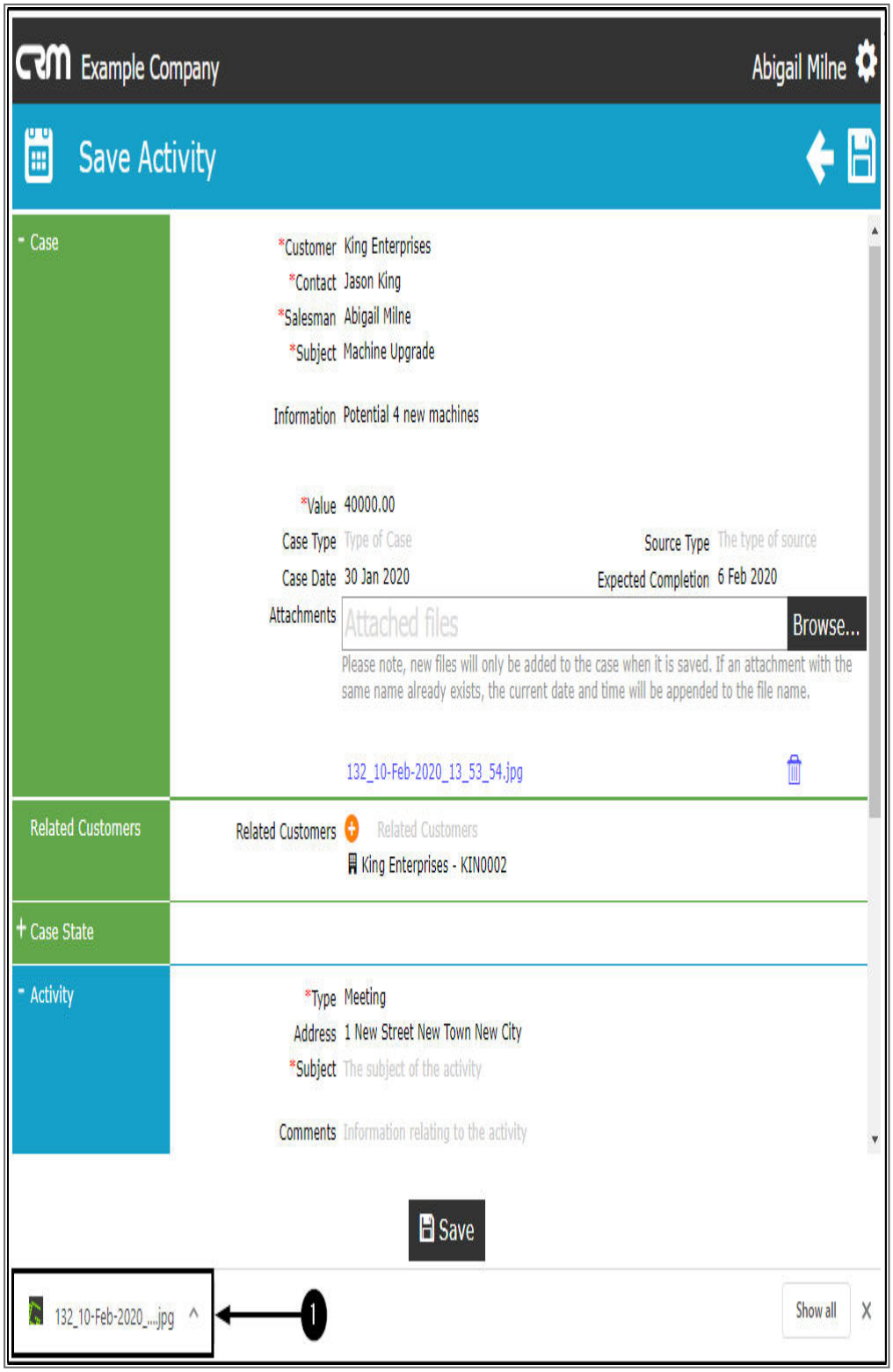

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1. You will be prompted to select a method of opening the image file.
2. In this example, **Greenshot image editor** is selected.

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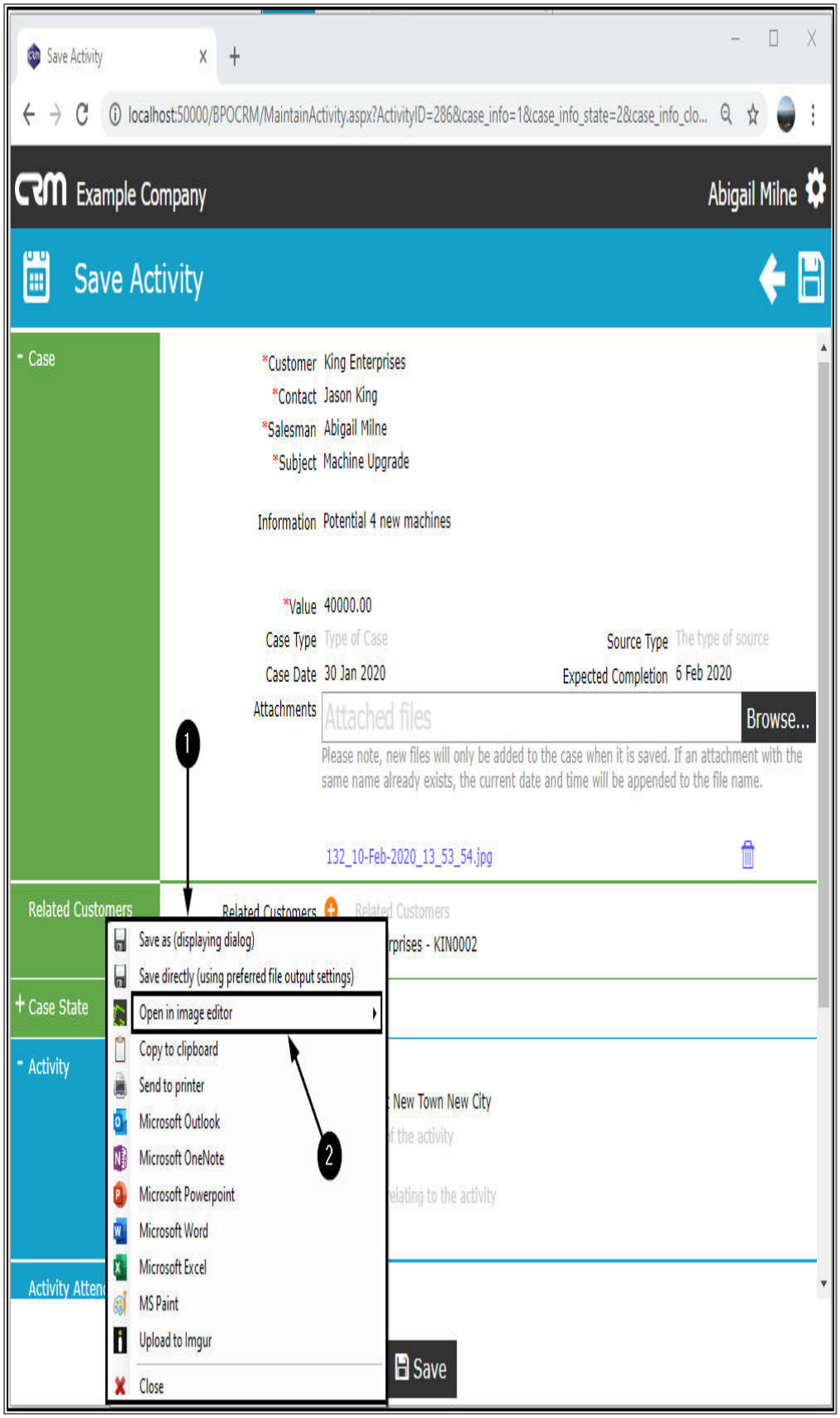

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1. The image editor will open.
2. You can now view your image.

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Related Topics

- Sales Connect - Overview and Index
- Sales Connect - Download and Log In / Out
- Sales Connect - Environment
- Sales Connect - Edit Activity Details
- Sales Connect - Add Notes to an Activity
- Sales Connect - Link Start and End Travel to an Activity
- CRM

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