

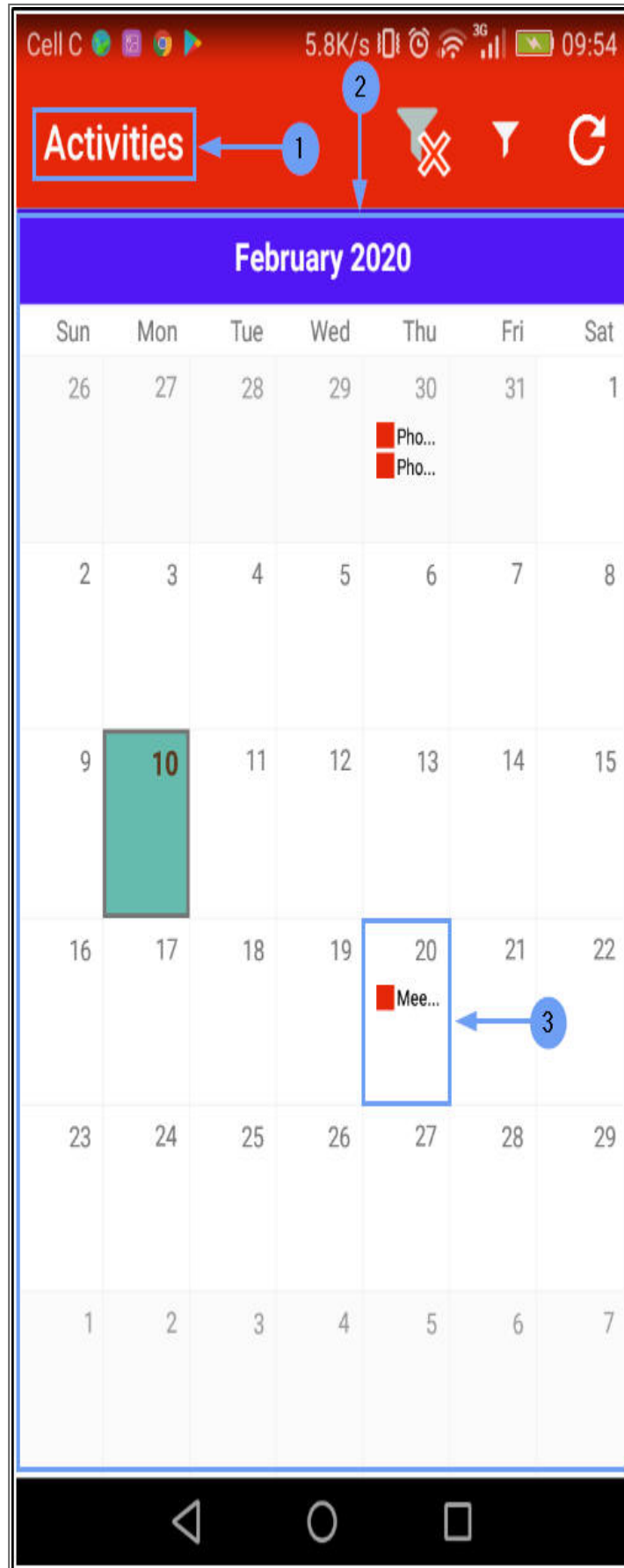
SALES CONNECT

LINK IMAGE OR PHOTO TO AN ACTIVITY

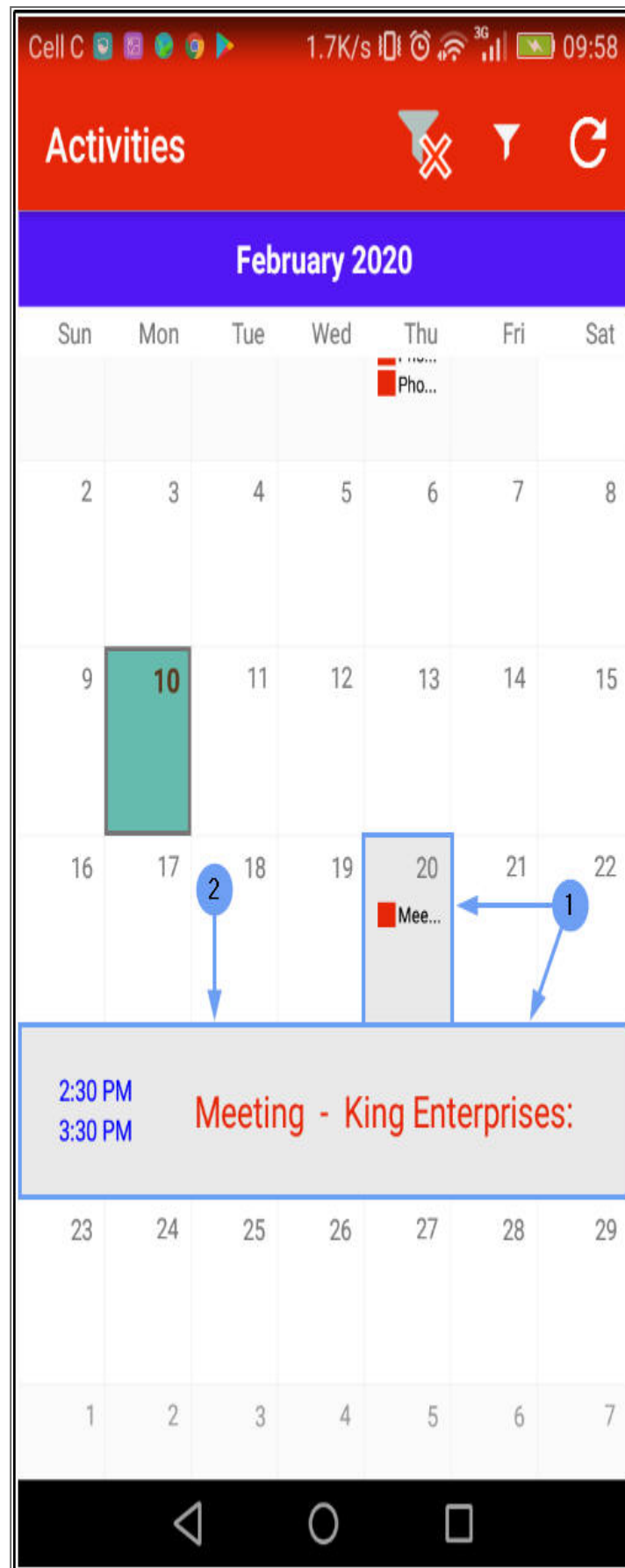
You can link an image directly to an **Activity Case** in Sales Connect. This image will pull through to the **Case** section of the Save Activity page in **CRM** where it can be downloaded, viewed, edited or deleted, as required.

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.

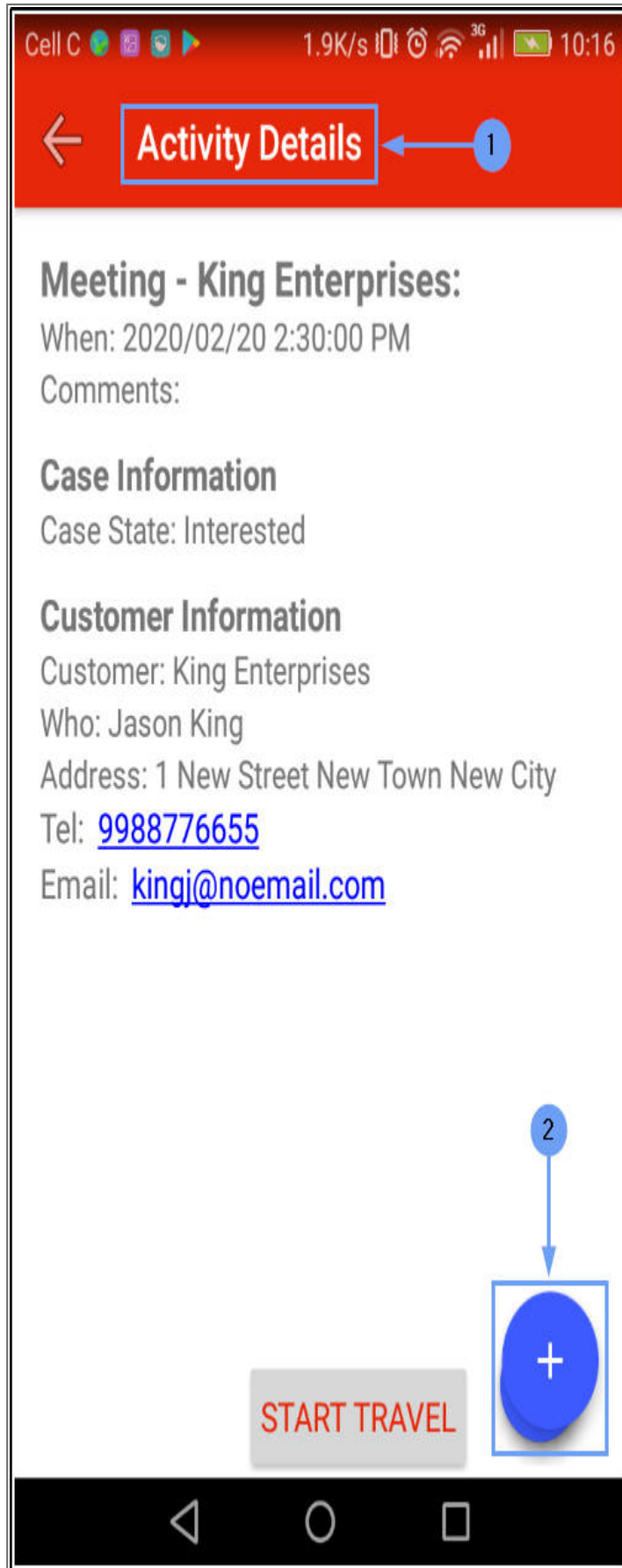


1. A **text box** will pop up with more information regarding the activity.
2. Tap on this text box.



THE ACTIVITY DETAILS SCREEN

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

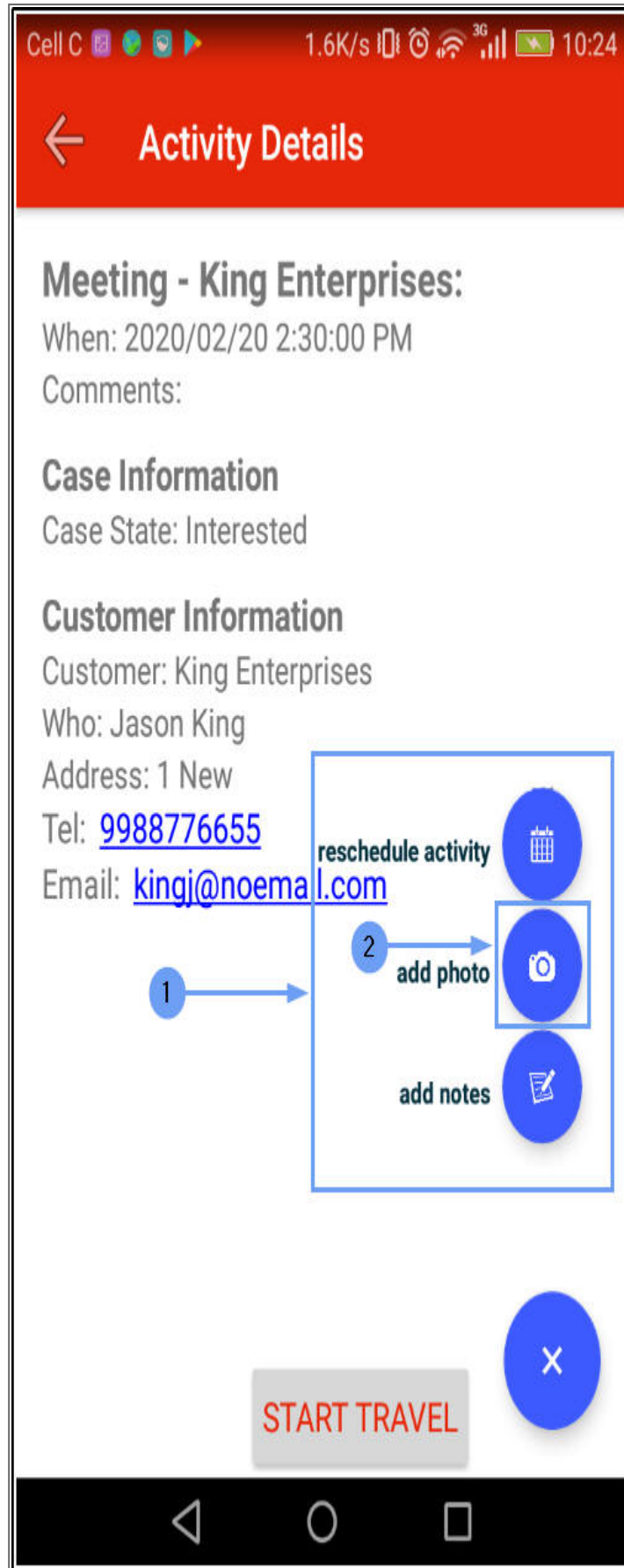


THE ACTIVITY EDIT BUTTONS

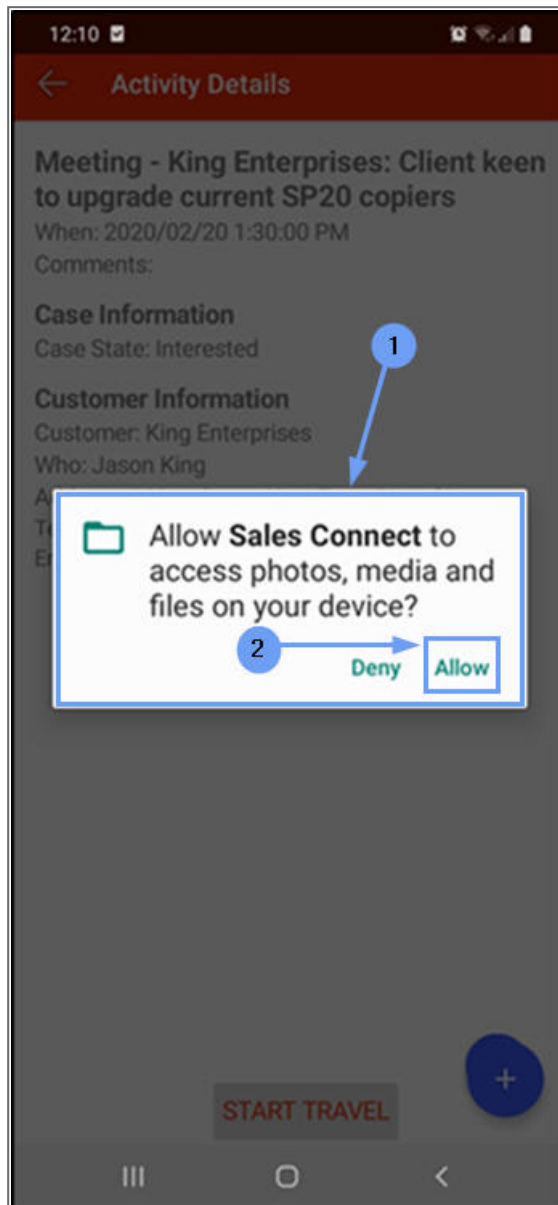
1. The screen will now display **3** editing buttons:
 - i. [reschedule activity](#)
 - ii. **add photo**
 - iii. [add notes](#)

ADD PHOTO

2. Tap on **add photo**.

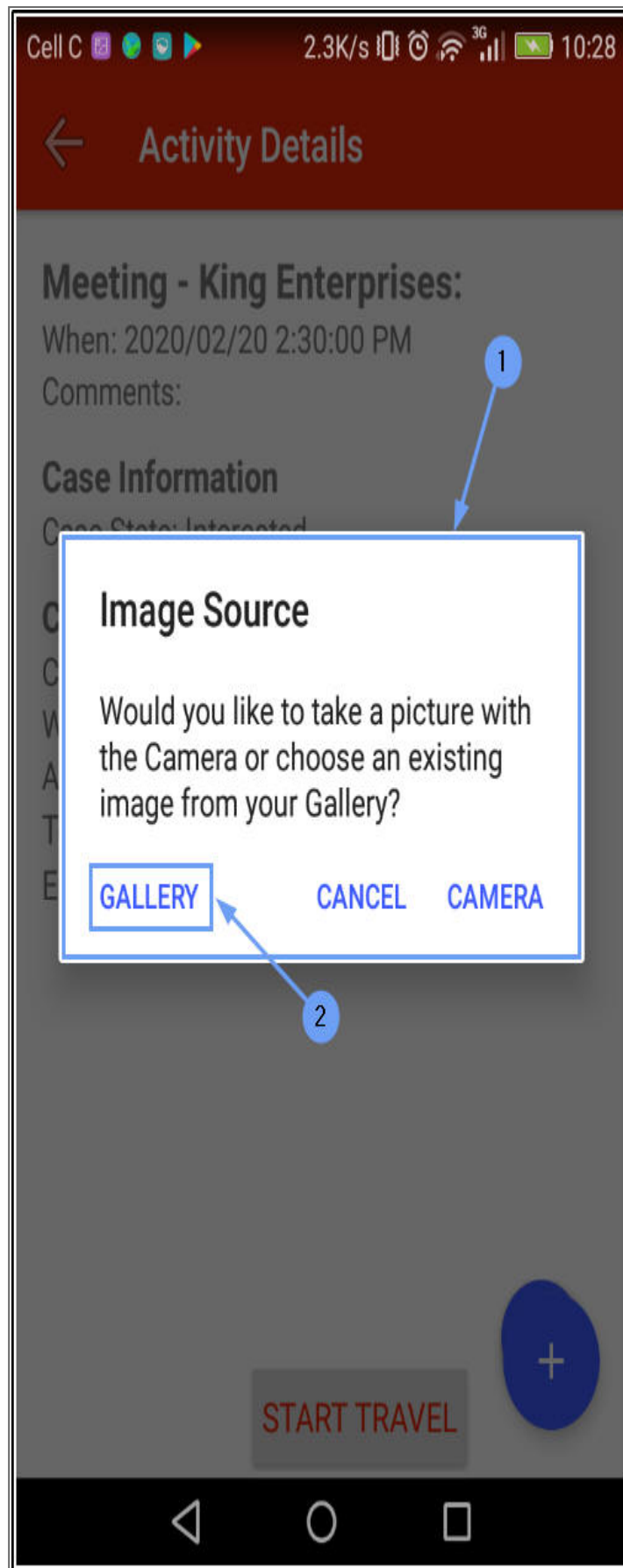


1. An **Access** message box may pop up in this screen asking;
 - *Allow Sales Connect to access photos, media and files on your device?*
2. Tap on **Allow**.



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**.

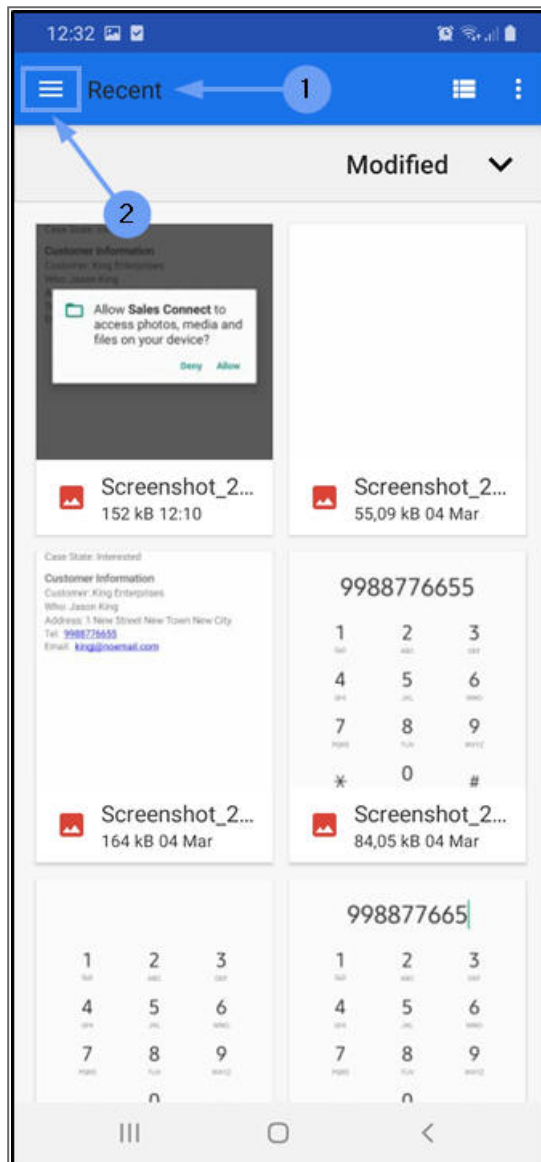


1. For convenience, the **Recent** screen will open with the most recently taken images displayed.

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.



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.

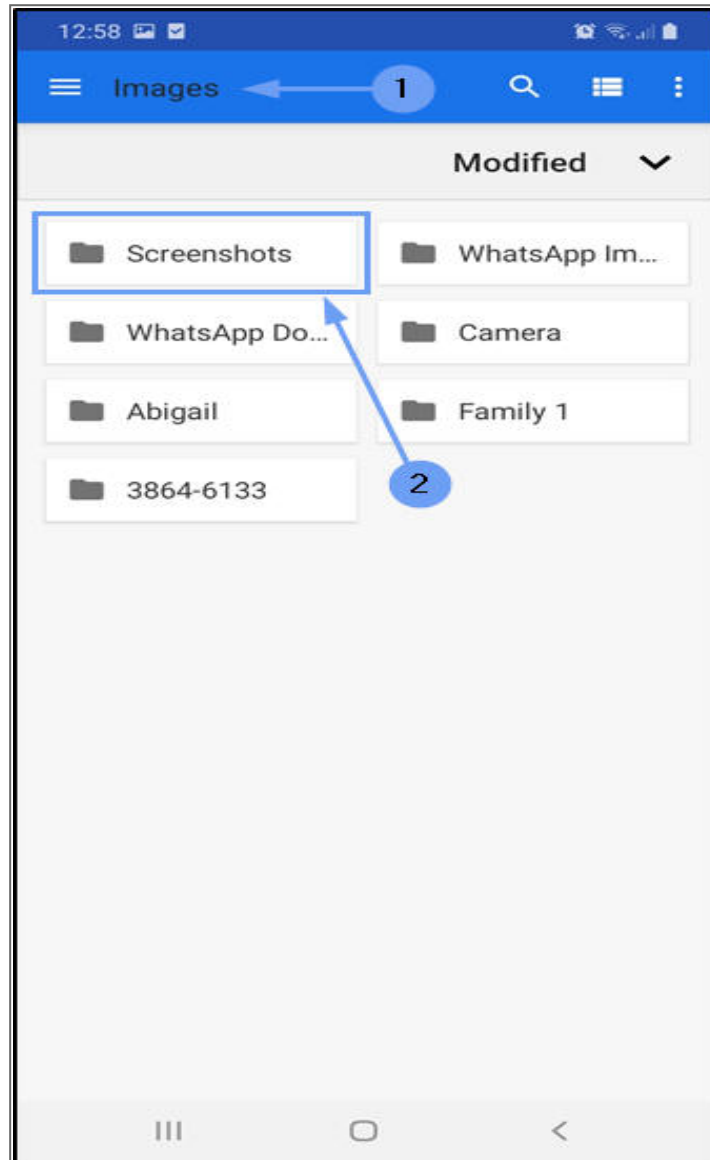


1. The **Images** screen will open.

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**.

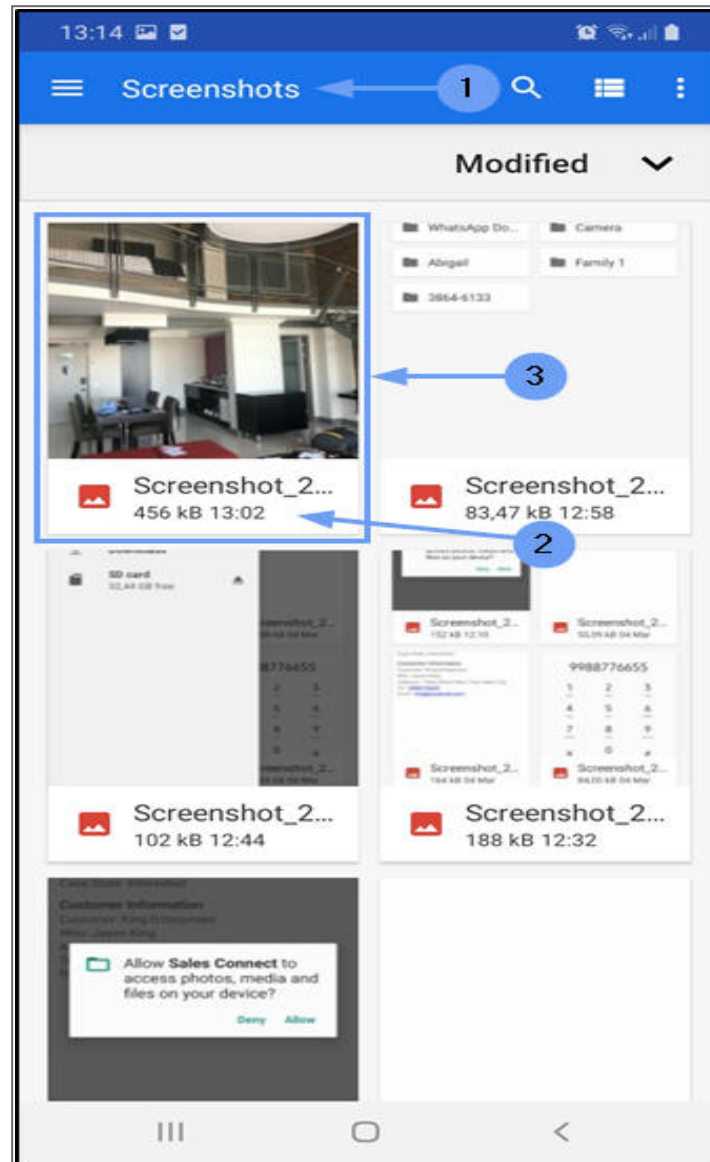


1. The **Screenshots** screen will open with the most recent screenshots - that have been uploaded to your device - displayed first.

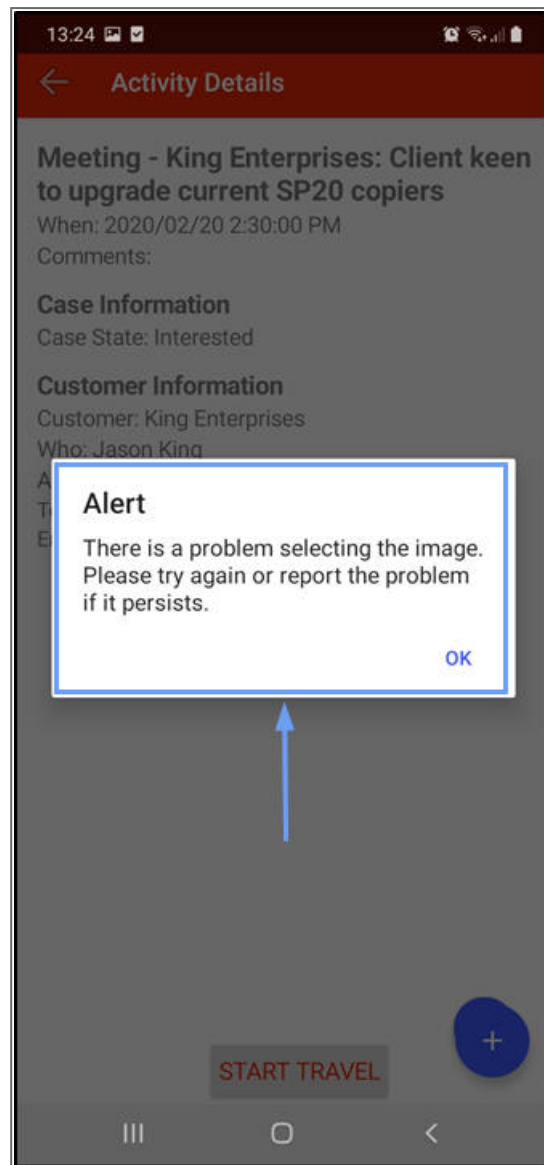
- The **Time** and **File Size** will be listed at the foot of each image.

Select Image

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



- Process under construction...
- Text...
- Text...



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



UNDER CONSTRUCTION

We are currently updating our site; thank you
for your patience, please check back soon.



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



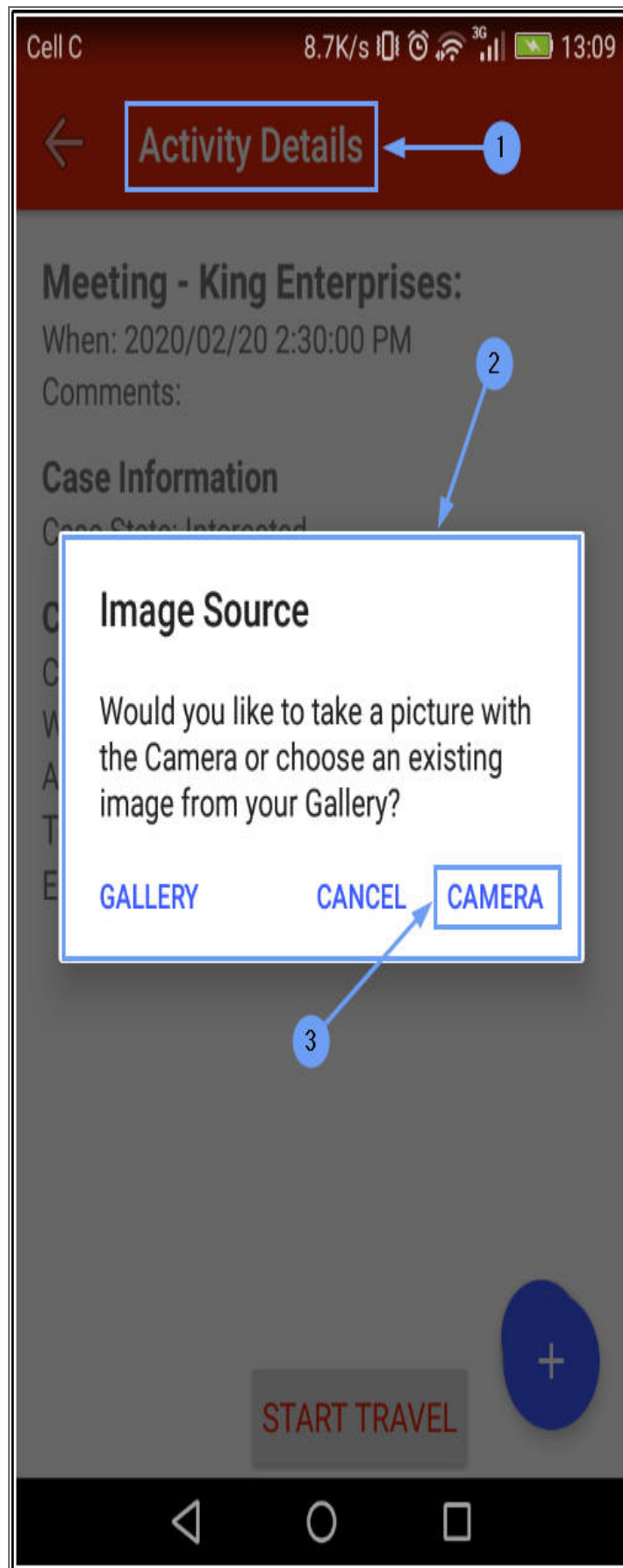
UNDER CONSTRUCTION

We are currently updating our site; thank you
for your patience, please check back soon.

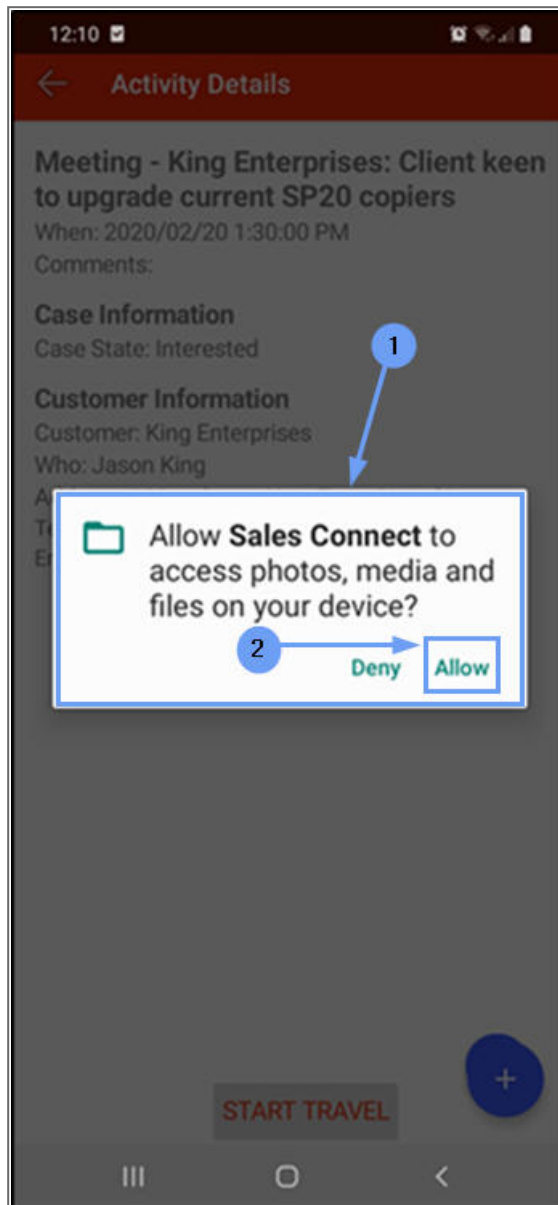


iii. Select Image Source - Camera

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

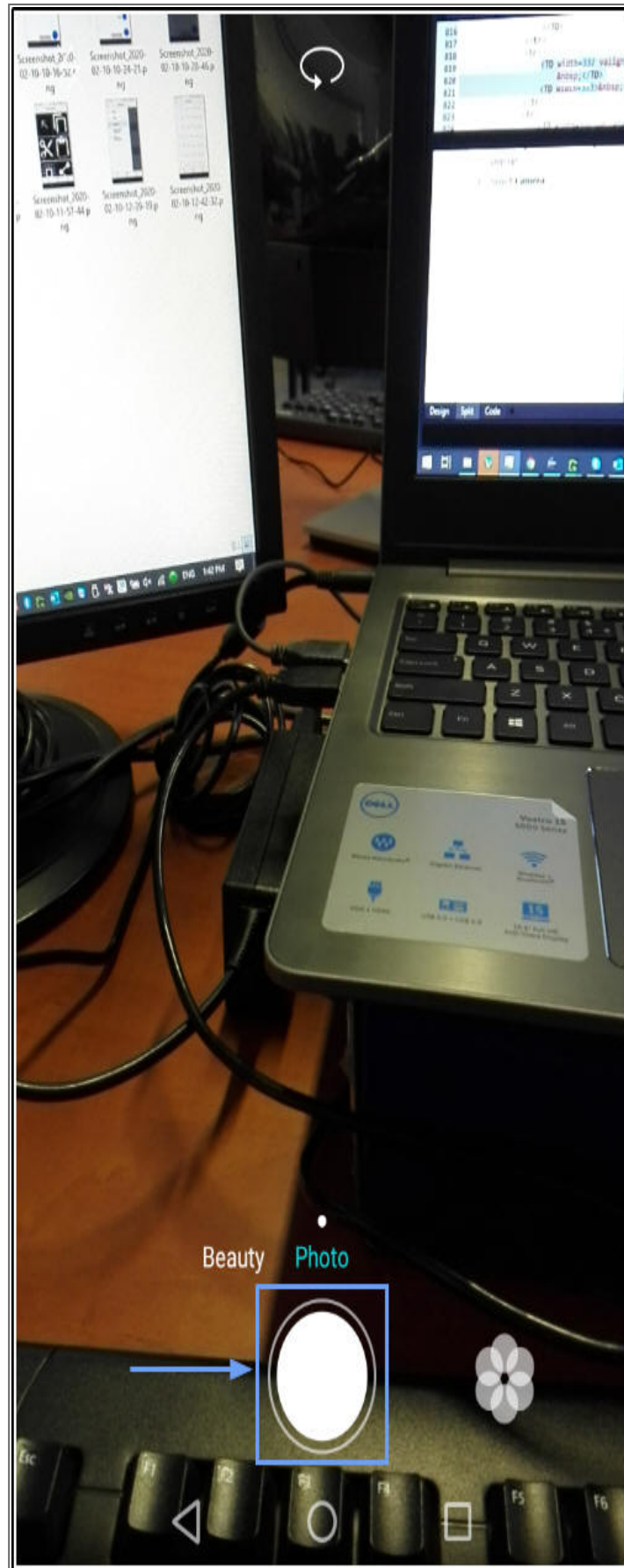


1. A message box may pop up in this screen asking;
 - *Allow Sales Connect to access photos, media and files on your device?*
2. Tap on **Allow**.



The Camera Capture Screen

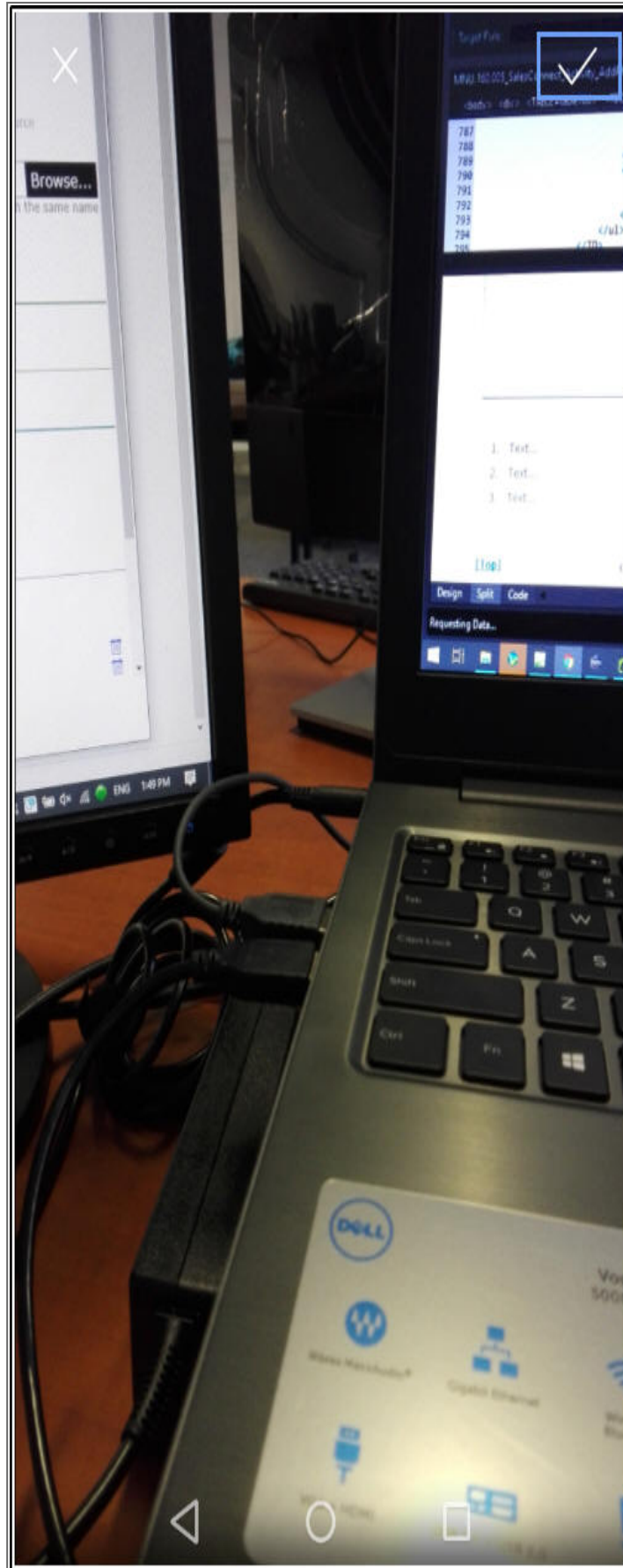
- The **Capture** screen will open on your device.
- When you have selected the scene that you wish to record/- photograph, tap on **Capture**.



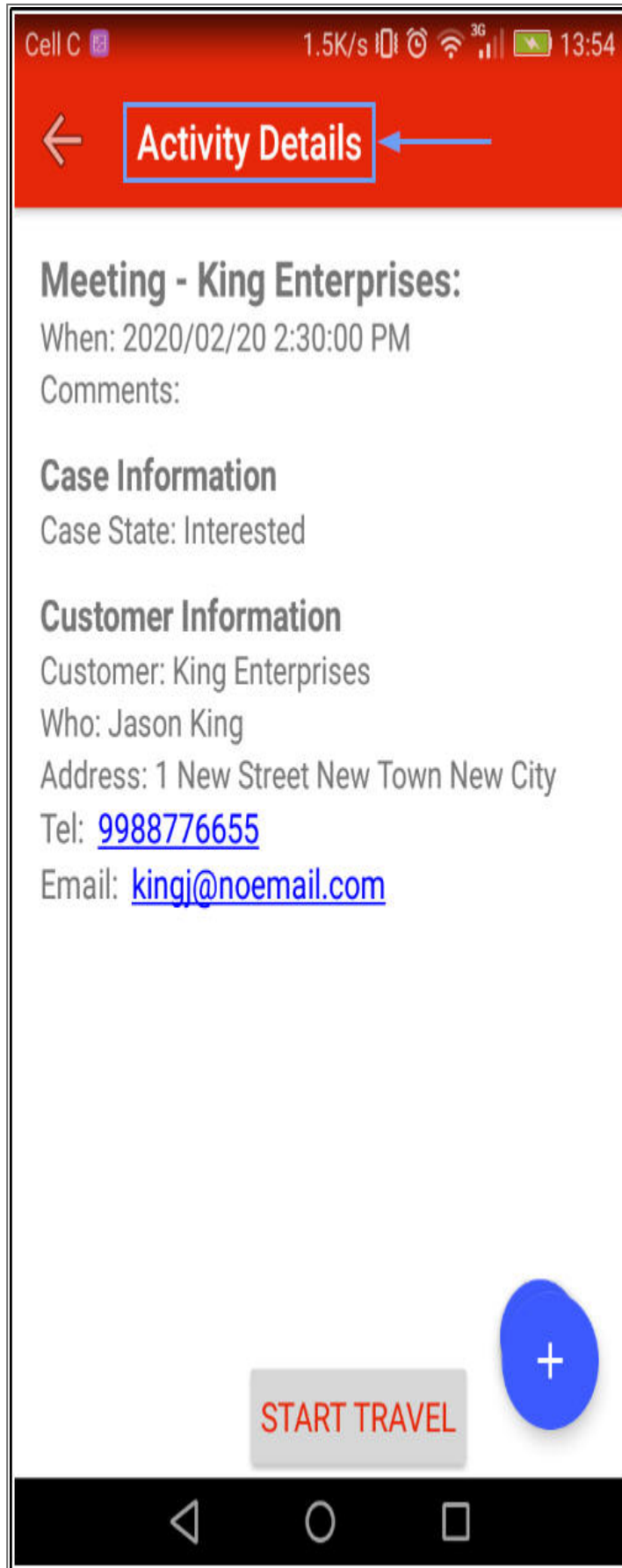
- Your captured image will be displayed on the screen.

SAVE IMAGE

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





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




VIEW LINKED IMAGE IN CRM

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



Example Company

Abigail Milne





Dashboard

1



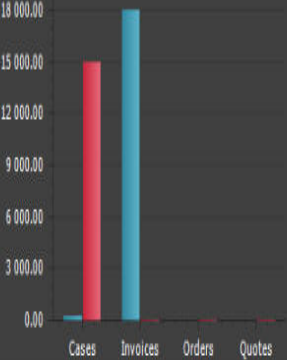
Search



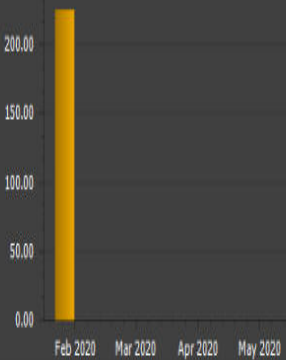
Activities for Last 30 Days

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



4 Month Pipeline



Today

Recent

Calendar

Schedule Date

Status

No data to display

15 Oct 2019 19

create cold call

12

recommendations

12

warnings

75

customers

13

cases

11

activities

2

15


quotes

148

equipment

8

3rd party




companion


application


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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**.


Example Company


Abigail Milne




My Activities






Schedule Date
Status


Meeting - Liberty Jones: Potential 4 new machines on site









When: 10 Mar 2020, 12:00-14:00
Who: [Jemma Jones](#), [Liberty Jones](#)
Tel: 0120230340
Email:


Cell: 0120230340
Bus: 0120230340


Meeting - King Enterprises:

When: 20 Feb 2020, 14:30-15:30
Who: [Jason King](#), [King Enterprises](#)
Tel: 9988776655
Email: [kingj@noemail.com](#)


Cell: 0113456789
Bus: 0113456789


Phone call - Hope Works: New deal proposal


When: 30 Jan 2020, 16:05-17:00
Who: [Jackie Samuels](#), [Hope Works](#)
Tel: 031 123 4567
Email: [standard@noemail.co.za](#)

Cell: 031 123 4567
Bus: 031 123 4567


Phone call - Liberty Jones: Discuss new products


When: 30 Jan 2020, 16:00-17:00
Who: [Davina Rowe](#), [Liberty Jones](#)
Tel:
Email:

Cell: 0120230340
Bus: 0120230340


On Site inspection - Liberty Jones: Proposal to set up new site

When: 20 Jan 2020, 12:00-13:00
Who: [Mark Jackson](#), [Liberty Jones](#)
Tel: 100 200 3000
Email: [mjackson@noemail.com](#)

Cell: 0120230340
Bus: 0120230340



Phone call - Lovely Test Customer: Customer keen to discuss upgrade

When: 6 Dec 2019, 13:00-14:00
Who: [Mr Lovely](#), [Lovely Test Customer](#)
Tel: 324234
Email:

Cell: 324234
Bus: 324234


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


Example Company

Abigail Milne





Save Activity








<div> <div>+</div> Case </div>	Subject Machine Upgrade
<div> <div>+</div> Case State </div>	<div> <div>*Case State</div> Interested (20%) </div> <div> Percentage 20% </div>
<div> <div>-</div> Activity </div>	<div> <div>*Type</div> Meeting </div> <div> Address 1 New Street New Town New City </div> <div> <div>*Subject</div> The subject of the activity </div> <div> Comments Information relating to the activity </div>
<div> <div>+</div> Activity Attendees </div>	<div> Attendees <div> <div>+</div> </div> <div> <div>Abigail Milne</div> <div>Jason King</div> <div>Belinda Sharman</div> <div>Carolina Lourens</div> </div> <div> <div>Page 1 of 1 (4 items)</div> <div> <div><</div> <div>[1]</div> <div>></div> <div>All</div> </div> <div> Page size: 10 </div> </div> <div> Send Email Invites <input type="checkbox"/> iCal invitations are disabled because you are using Exchange syncing. </div> </div>
<div> <div>+</div> Schedule </div>	<div> Date 20 Feb 2020 from 14:30 to 15:30 </div> <div> Reminder Email <input type="checkbox"/> SMS <input type="checkbox"/> ... 37 days before scheduled start </div>
<div> <div>+</div> Quote </div>	


Save

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**.


Example Company

Abigail Milne



Save Activity



Case

*Customer King Enterprises
*Contact Jason King
*Salesman Abigail Milne
*Subject Machine Upgrade


Information Potential 4 new machines

*Value 40000.00

Case Type Type of Case
Source Type The type of source
Case Date 30 Jan 2020
Expected Completion 6 Feb 2020

Attachments
Attached files
Browse...

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

132_10-Feb-2020_13_53_54.jpg


Related Customers

Related Customers + Related Customers
King Enterprises - KIN0002

+ Case State


Activity

*Type Meeting
Address 1 New Street New Town New City
*Subject The subject of the activity


Comments Information relating to the activity


Activity Attendees




Attendees +

 Save

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


Example Company

Abigail Milne



Save Activity



Case

*Customer King Enterprises
*Contact Jason King
*Salesman Abigail Milne
*Subject Machine Upgrade

Information Potential 4 new machines


*Value 40000.00

Case Type Type of Case
Source Type The type of source
Case Date 30 Jan 2020
Expected Completion 6 Feb 2020

Attachments

Attached files
Browse...

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

132_10-Feb-2020_13_53_54.jpg


Related Customers


Related Customers
+ Related Customers
King Enterprises - KIN0002


+ Case State

Activity

*Type Meeting
Address 1 New Street New Town New City
*Subject The subject of the activity

Comments Information relating to the activity


Save


132_10-Feb-2020_...jpg
^

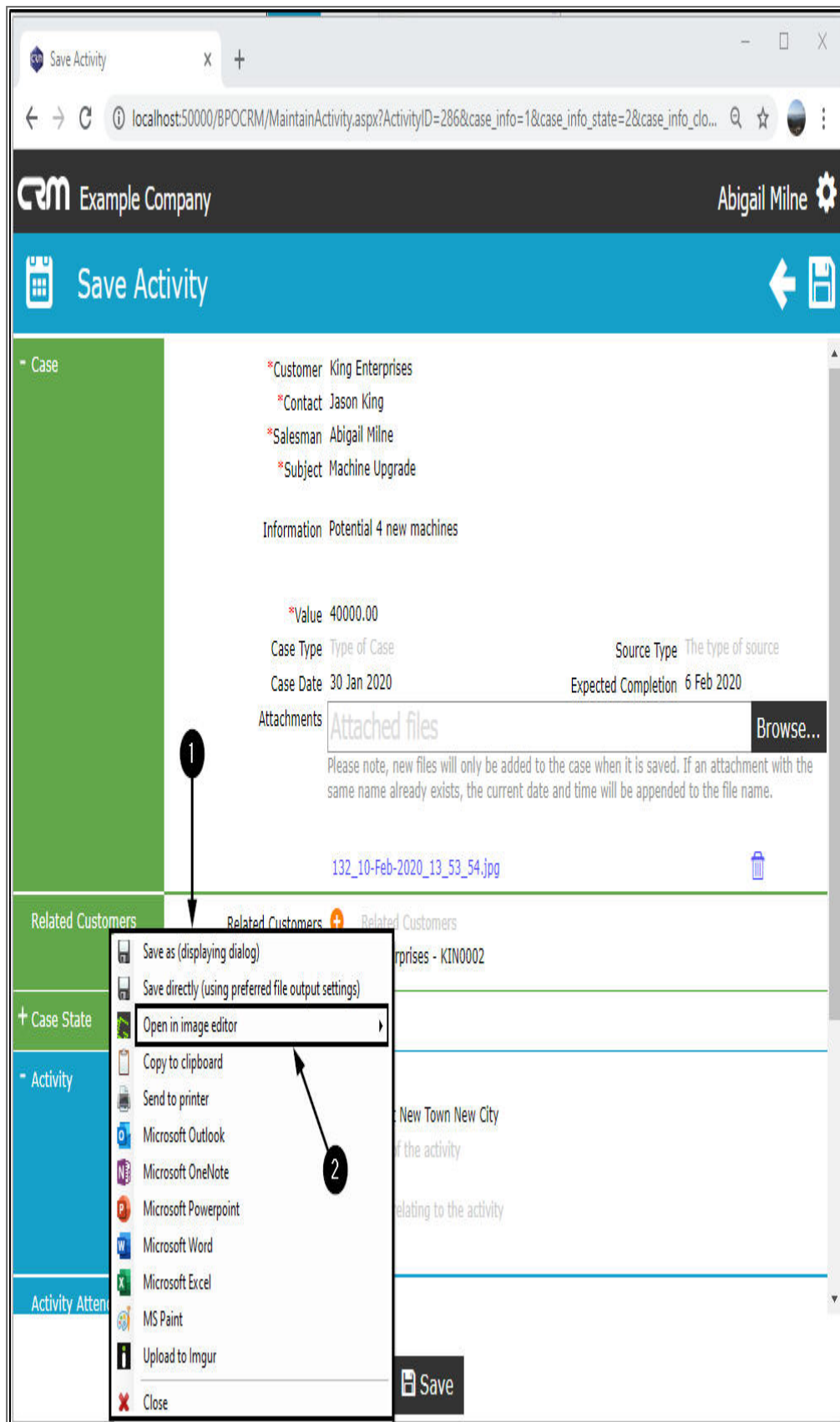
1

Show all
X

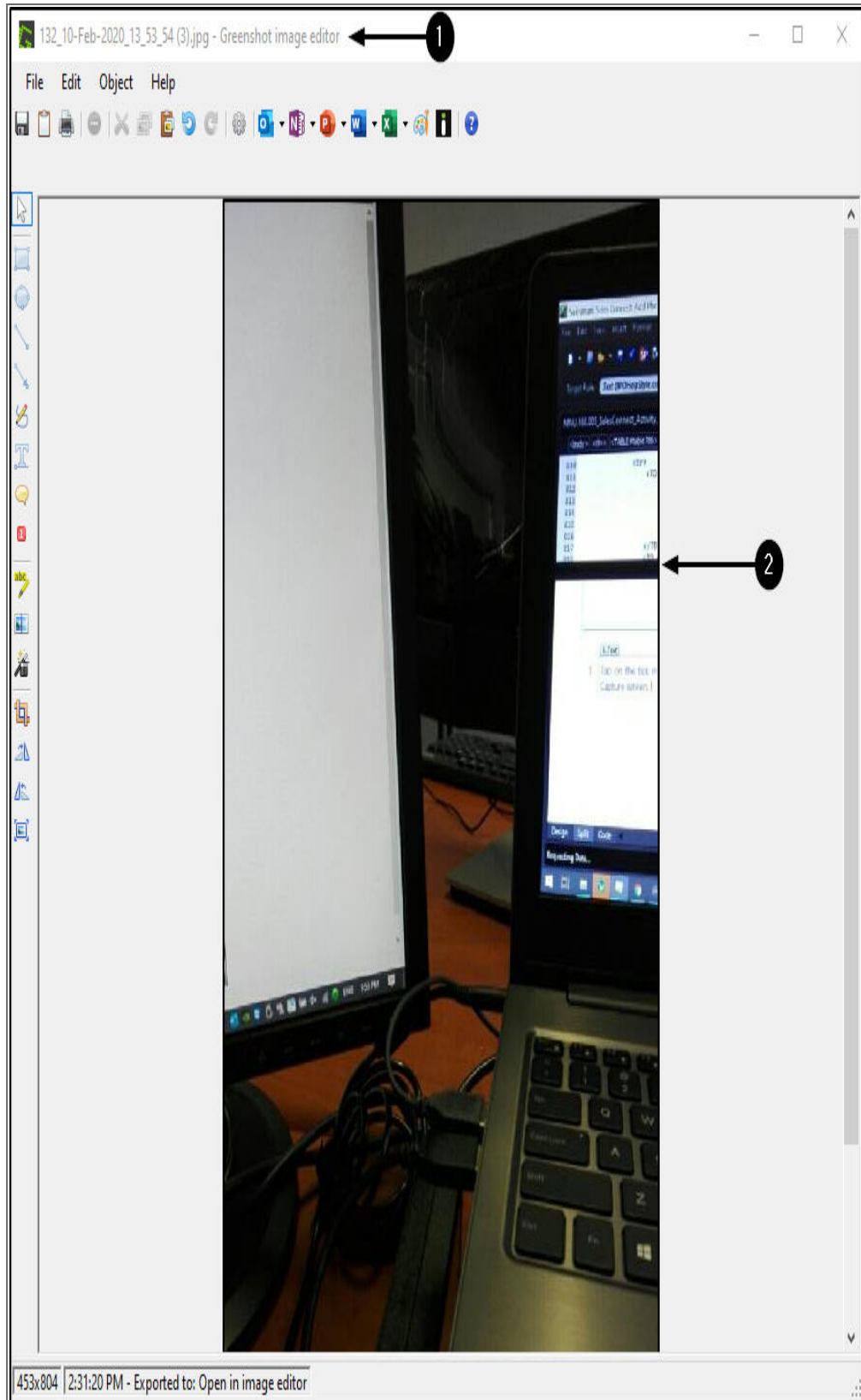
Help v2.5.1.4 - Pg 36 - Printed: 27/06/2024

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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.



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



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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