

We are currently updating our site; thank you for your patience.

## 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.

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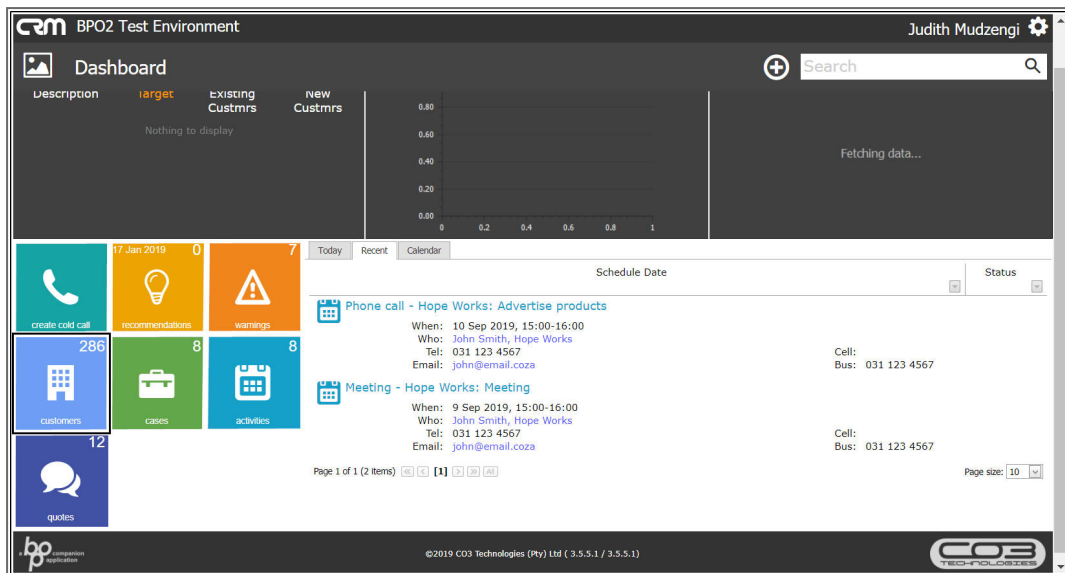
**Ribbon Access:** Webpage > [http://\[servername\]:\[port-no\]/BPOCRM/User.aspx](http://[servername]:[port-no]/BPOCRM/User.aspx)

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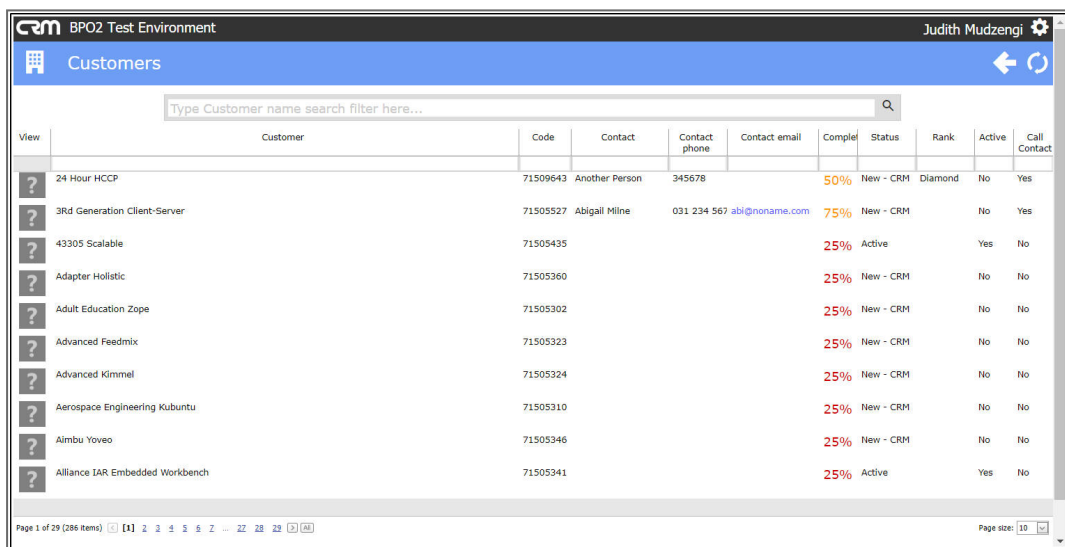
### ACCESS COLD CALLS FROM CUSTOMER DASHBOARD

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

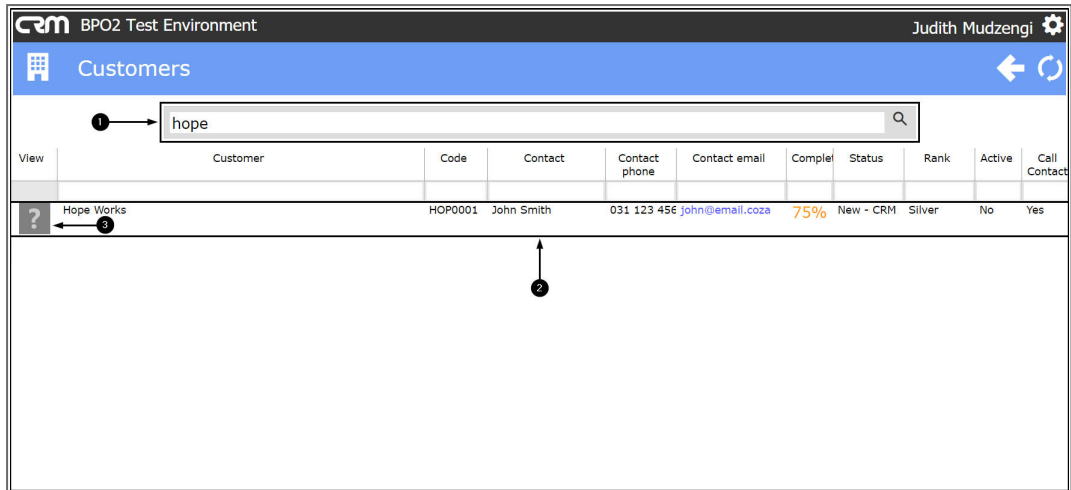


- The **Customers** screen will be displayed.
- A list of customers will be displayed.



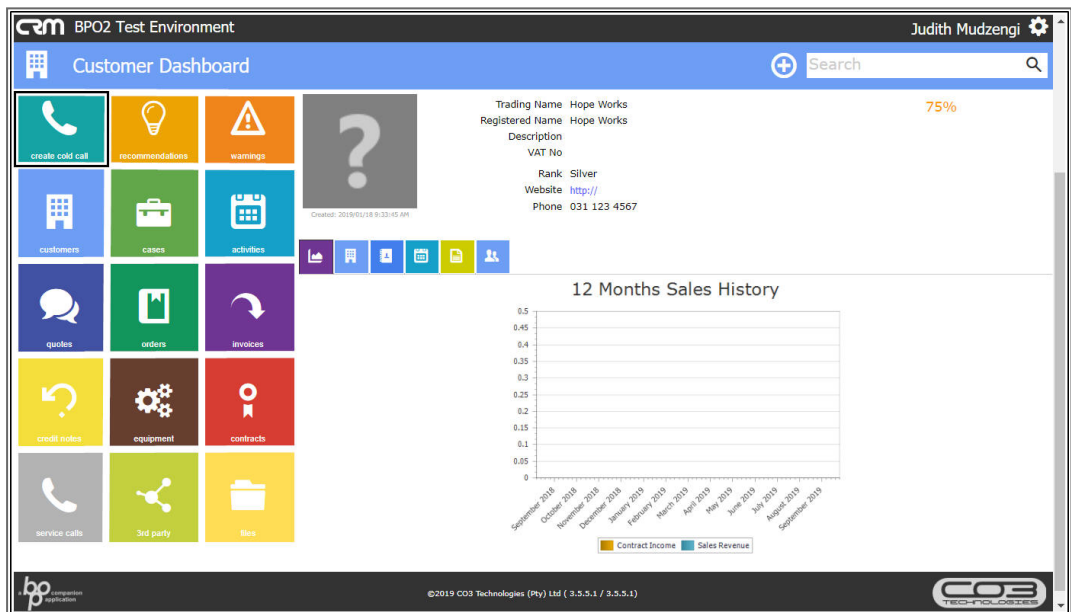
View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
?	24 Hour HCCP	71509643	Another Person	345678		50%	New - CRM	Diamond	No	Yes
?	3rd Generation Client-Server	71505527	Abigail Milne	031 234 567	abi@noname.com	75%	New - CRM		No	Yes
?	43305 Scalable	71509435				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
?	Almbu Yoveo	71505346				25%	New - CRM		No	No
?	Alliance IAR Embedded Workbench	71505341				25%	Active		Yes	No

1. 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.



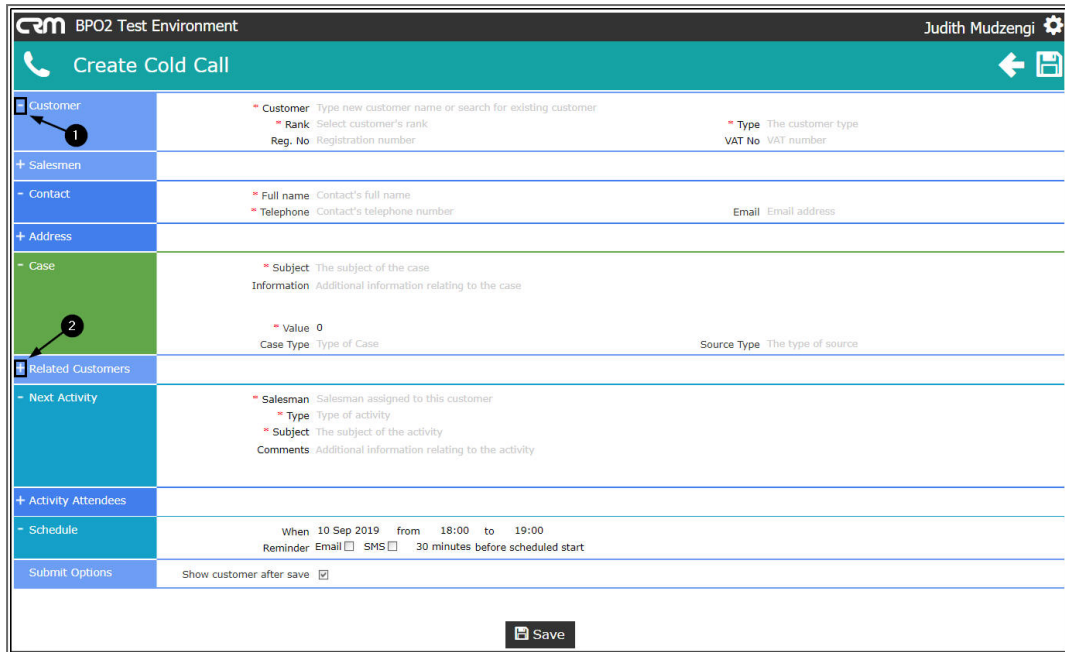
The **Customer Dashboard** screen will be displayed.

- Click on the **Create Cold Call** tile.



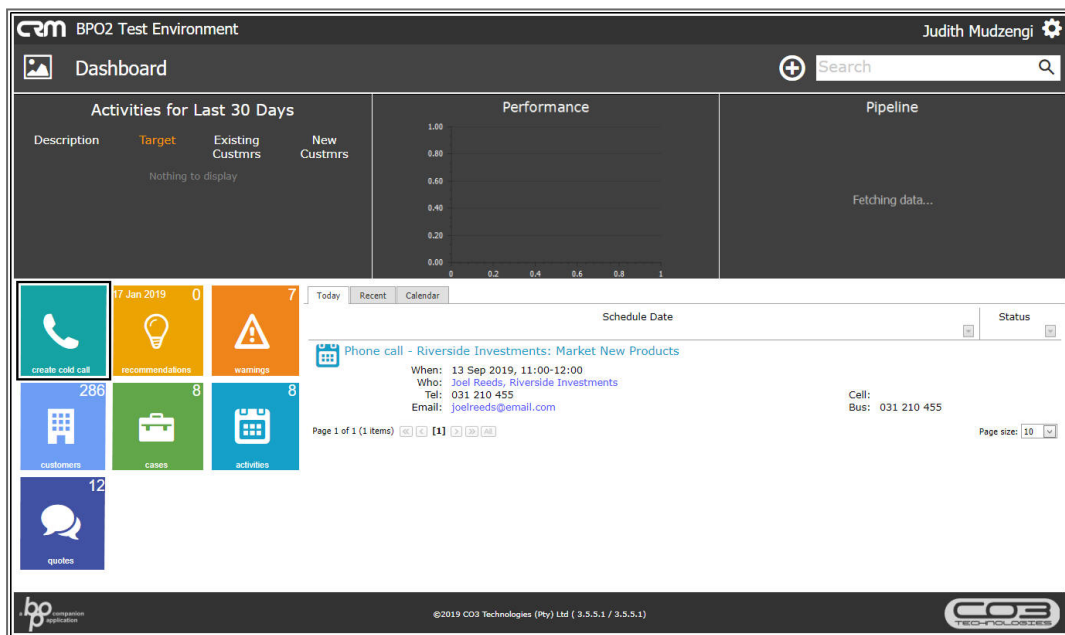
The **Create Cold Call** screen will be displayed.

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



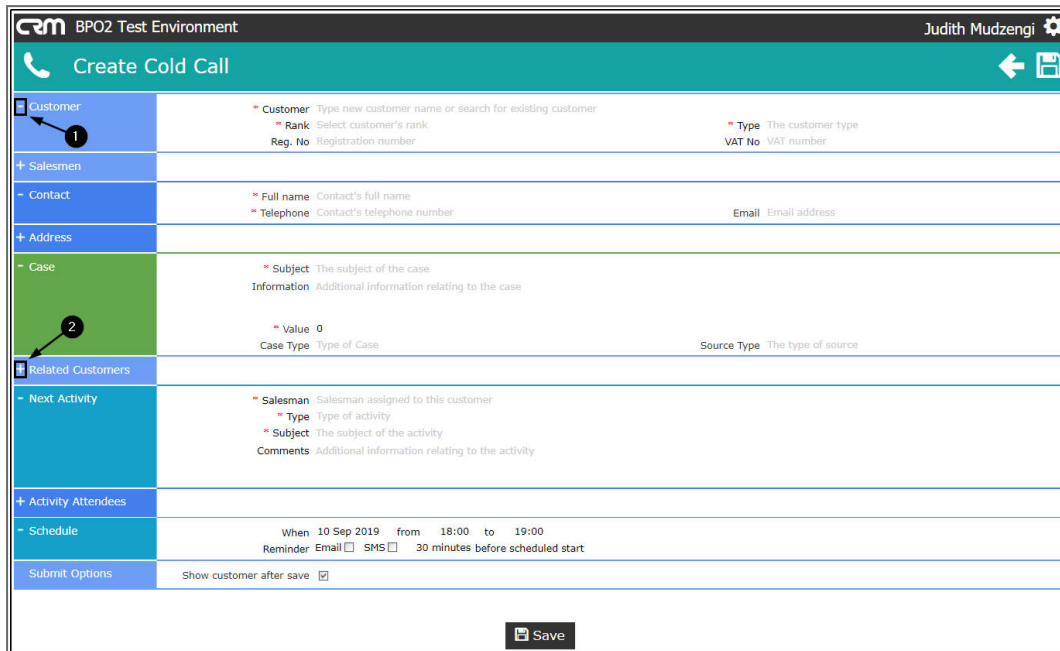
## ACCESS COLD CALLS FROM THE DASHBOARD

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.



## CREATE COLD CALL FOR NEW CUSTOMER

### Customer F rame

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

**CRM BPO2 Test Environment** Judith Mudzengi

## Create Cold Call

**Customer**

Customer: **Rank** **Reg. No** **Type** **VAT No**

**Salesmen**

**Contact**

**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

**Related Customers**

**Next Activity**

**Salesman** Salesman assigned to this customer  
**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 11:00 to 12:00  
Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

**Submit Options**

Show customer after save ☒

**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.

**CRM BPO2 Test Environment** Judith Mudzengi

## Create Cold Call

**Customer**

Customer: **Rank** **Reg. No** **Type** **VAT No**

**Salesmen**

**Contact**

**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

**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 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.

CRM BPO2 Test Environment

Judith Mudzengi

Create Cold Call

Customer

Customer: Riverside Investments

Rank: Diamond (5 days)

Reg. No: 789065

Type: Construction

VAT No: 908754637

Salesmen

☐ Abigail Milne  
☐ Adele Weeder  
☐ Alex Spangenberg  
☐ Almeria Teacy  
☐ Andromache Joselevitch  
☐ Angie Roseborough  
☐ Armando Reichelt  
☐ Ary Huelin

☐ Chris Haynes  
☐ CO3 Admin  
☐ Colin Holden  
☐ Dalene Pillay  
☐ Darryl Muller  
☐ Debbie Luger  
☐ Derrick Weeder  
☐ Edvell Matkova

☐ Judith Mudzengi  
☐ Kashmira Nirghin  
☐ Kassia Maitland  
☐ Kim Engelbrecht  
☐ Lucky Mavuye  
☐ Malory Allibon  
☐ Marc Rapsold  
☐ Marius Engelbrecht

Contact

Full name: Contact's full name

Telephone: Contact's telephone number

Email: Email address

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

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 13:00

Reminder: Email ☐ SMS ☐ 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 Environment

Judith Mudzengi

Create Cold Call

Customer

Customer Riverside Investments

Rank Diamond (5 days)

Reg. No 789065

Type Construction

VAT No 908754637

Salesmen

☒ Abigail Hiline  
☐ Adele Weeder  
☐ Alex Spangenberg  
☒ Almeria Teacy  
☐ Andromache Joselevitch  
☐ Angie Roseborough  
☐ Armando Reichelt

☐ Chris Haynes  
☒ CO3 Admin  
☐ Colin Holden  
☐ Dalene Pillay  
☐ Darryl Muller  
☐ Debbie Lugar  
☐ Derrick Weeder

☒ Judith Mudzengi  
☐ Kashmira Nirghin  
☐ Kessia Maltland  
☐ Kim Engelbrecht  
☐ Lucky Mawuye  
☐ Malory Allibon  
☐ Marc Repsold

Contact

Full name Contact's full name

Telephone Contact's telephone number

Email Email address

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

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 11:00 to 12:00

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.



CRM BPO2 Test Environment

Judith Mudzengi

Create Cold Call

Customer

Customer Riverside Investments

Rank Diamond (5 days)

Reg. No 789065

Type Construction

VAT No 908754637

Salesmen

☒ Abigail Milne  
☐ Adele Weeder  
☐ Alex Spangenberg  
☒ Almeria Teacy  
☐ Andromache Joselevitch  
☐ Angie Roseborough  
☐ Armando Reichelt  
☐ Ary Huelin

☐ Chris Haynes  
☒ CO3 Admin  
☐ Colin Holden  
☐ Dalene Pillay  
☐ Darryl Muller  
☐ Debbie Luger  
☐ Derrick Weeder  
☐ Edvelli Msakva

☒ Judith Mudzengi  
☐ Kashmira Nirghin  
☐ Kessia Maitland  
☐ Kim Engelbrecht  
☐ Lucky Mavuye  
☐ Malory Allibon  
☐ Marc Rapsold  
☐ Marius Engelbrecht

Contact

Full name Joel Reeds

Telephone 031 210 455

Email joelreeds@email.com

Address

Existing Address for the contact

Address Line 1

Address Line 2

Suburb

City

Province/State

Post Code

Country

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

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 11:00 to 12:00

Reminder 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.

CRM BPO2 Test Environment

Judith Mudzengi

Create Cold Call

Customer

Customer: Riverside Investments

Rank: Diamond (5 days)

Reg. No: 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  
☒ CO3 Admin  
☐ Colin Holden  
☐ Dalene Pillay  
☐ Darryl Muller  
☐ Debbie Luger  
☐ Derrick Weeder  
☐ Edwell Meakiva

☒ Judith Mudzengi  
☐ Kashmire Ringhin  
☐ Kessia Maitland  
☐ Kim Engelbrecht  
☐ Lucky Mavuye  
☐ Malory Allison  
☐ Marc Repsold  
☐ Marius Encebrecht

Contact

Full name: Joel Reeds

Telephone: 031 210 455

Email: joelreeds@email.com

Address

Existing: New

Address Line 1: 12 Salby Court

Address Line 2: 7 Colinton 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 case

Value: 0

Case Type: 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 13:00

Reminder: Email ☐ SMS ☐ 30 minutes before scheduled start

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 not need to link a **Related Customer**, you can move on to the **Activity frame**.

## Add Related Customer

1. 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

Customer: Riverside Investments  
Rank: Diamond (5 days)  
Reg. No: 789065  
Type: Construction  
VAT No: 908754637

Salesmen

☒ Abigail Milne  
☐ Adele Weeder  
☐ Alex Spangenberg  
☒ Almeria Teacy  
☐ Andromache Joselevitch  
☐ Angie Roseborough  
☐ Armando Reichelt  
☐ Arv Huellin  
☐ Chris Haynes  
☒ CO3 Admin  
☐ Colin Holden  
☐ Dalene Pillay  
☐ Darryl Muller  
☐ Debbie Luger  
☐ Derrick Weeder  
☐ Edvill Maskiva  
☒ Judith Mudzengi  
☐ Kashmira Nirghin  
☐ Kessia Maitland  
☐ Kim Engelbrecht  
☐ Lucky Mavuye  
☐ Malory Allibon  
☐ Marc Rapsold  
☐ Marius Engelbrecht

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 Colinton Rd  
Suburb: Gillits  
City: Durban  
Province/State: KZN  
Post Code: 4000  
Country: RSA

Case

Subject: Market New Products  
Information: Market New Products  
Value: 200000  
Case Type: New Customer  
Source Type: Referral

Related Customers

Related Customers: ☒ Deleted Customers  
No data to display

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 13:00  
Reminder: Email ☐ SMS ☐ 30 minutes before scheduled start


Submit Options


Show customer after save: ☒

Save

## Delete Related Customer

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


BPO2 Test Environment

Judith Mudzengi


Create Cold Call

Customer

Customer: Riverside Investments
Rank: Diamond (5 days)
Reg. No: 789065

Type: Construction
VAT No: 908754637

Salesmen

☒ Abigail Milne
☐ Chris Haynes
☐ Judith Mudzengi

☐ Adele Weeder
☒ CO3 Admin
☐ Kashmira Ntshini

☐ Alex Spangenberg
☐ Colin Holden
☐ Kessia Maitland

☒ Almeria Teacy
☐ Dalene Pillay
☐ Kim Engelbrecht

☐ Andromache Joselevitch
☐ Darryl Muller
☐ Lucky Mavuye

☐ Angie Roseborough
☐ Debbie Luger
☐ Malory Allibon

☐ Armando Reichelt
☐ Derrick Weeder
☐ Marc Repsold

☐ Ann-Marie
☐ Edward Mubvumba
☐ Mervyn Seneke

Contact

Full name: Joel Reeds
Telephone: 031 210 455
Email: joelreeds@email.com

Address

Existing New
Address Line 1: 12 Salby Court
Address Line 2: 7 Colinton Rd
Suburb: Gillits
City: Durban
Province/State: KZN
Post Code: 4000
Country: RSA

Case

Subject: Market New Products
Information: Market New Products

Value: 200000
Case Type: New Customer
Source Type: Referral

Related Customers

Related Customers:
Hope Works: HOP0001
Hope Works: HOP0001

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 16:00 to 17:00
Reminder: Email ☐ SMS ☐ 30 minutes before scheduled start

Submit Options

Show customer after save: ☒

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.

CRM BPO2 Test Environment

Judith Mudzengi

Create Cold Call

Customer

\* Customer Riverside Investments

\* Rank Diamond (5 days)

Reg. No 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  
☒ CO3 Admin  
☐ Colin Holden  
☐ Dalene Pillay  
☐ Darryl Muller  
☐ Debbie Luger  
☐ Derrick Weeder  
☐ Edwell Msakva

☒ Judith Mudzengi  
☐ Kashmira Ninghin  
☐ Kessia Maitland  
☐ Kim Engelbrecht  
☐ Lucky Mavuye  
☐ Malory Allibon  
☐ Marc Repsold  
☐ Marius Engelbrecht

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 Collinton Rd

Suburb Gillits

City Durban

Province/State KZN

Post Code 4000

Country RSA

Case

\* Subject Market New Products

Information Market New Products

\* Value 200000

Case Type New Customer

Source Type Referral

Related Customers

Related Customers

Hope Works: HOP0001

Hope Works - HOP0001

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 11:00 to 12:00

Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

Submit Options

Show customer after save ☒

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).

- **Note:** The **Send Email Invites** option may be selected by default ( **depending on the BPOCRM configuration** ).

 Save

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CRM BPO2 Test Environment

Judith Mudzengi

Create Cold Call

Customer

Customer

Riverside Investments

Rank Diamond (5 days)

Reg. No 789065

Type Construction

VAT No 908753637

Salesmen

☒ Abigail Milne  
☐ Adele Weeder  
☐ Alex Spangenberg  
☒ Almeria Teacy  
☐ Andromache Josselovitch  
☐ Angie Roseborough  
☐ Armando Reichelt  
☐ Arv Huelin

☐ Chris Haynes  
☒ CO3 Admin  
☐ Colin Holden  
☐ Dalene Pillay  
☐ Darryl Muller  
☐ Debbie Lugar  
☐ Derrick Weeder  
☐ Edvill Maskiva

☒ Judith Mudzengi  
☐ Kashmira Ntshini  
☐ Kessia Marland  
☐ Kim Engelbrecht  
☐ Lucky Mawaya  
☐ Malory Allibon  
☐ Marc Rapsold  
☐ Marius Enelbrecht

Contact

Full name Joel Reeds

Telephone 031 210 455

Email joelreeds@gmail.com

Address

Existing New

Address Line 1 12 Selby Court

Address Line 2 7 Colinton Rd

Suburb Gillits

City Durban

Province/State KZN

Post Code 4000

Country RSA

Case

Subject Market New Products

Information Market New Products

Value 200000

Case Type New Customer

Source Type Referral

Related Customers

Related Customers

Hope Works: HOP0001

Hope Works: HOP0001

Next Activity

Salesman Judith Mudzengi

Type Phone call

Subject Market New Products

Comments Market New Products

Activity Attendees

Attendees

John Smith: Hope Works

John Smith

Page 1 of 1 (1 items)

Send Email Invites

\*note that invitations can only be sent to attendees with valid email addresses

Schedule

When 12 Sep 2019

from 13:00 to 14:00

Reminder Email

SMS

30 minutes before scheduled start

Submit Options

Show customer after save

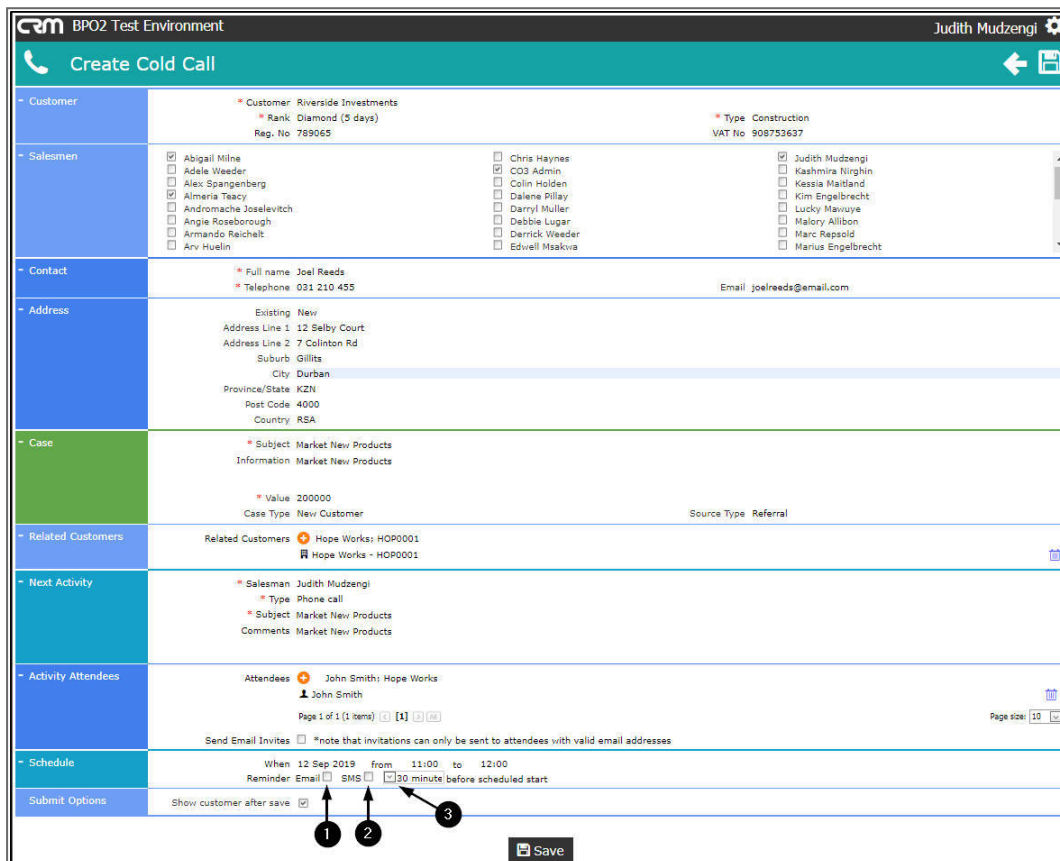
Save

## 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.
  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** .



**CRM BPO2 Test Environment** Judith Mudzengi

**Create Cold Call**

**Customer**  
 \* Customer: Riverside Investments  
 \* Rank: Diamond (5 days)  
 Reg. No: 789065  
 \* Type: Construction  
 VAT No: 908753637

**Salesmen**  
☒ Abigail Milne  
☐ Adele Weeder  
☐ Alex Spangenberg  
☐ Almeria Tracy  
☐ Andromache Josselovitch  
☐ Angie Roseborough  
☐ Armando Reichelt  
☐ Any Huelin  
☐ Chris Haynes  
☒ CO3 Admin  
☐ Colin Holden  
☐ Dalene Pillay  
☐ Darryl Muller  
☐ Debbie Luger  
☐ Derrick Weeder  
☐ Edwile Msakva  
☒ Judith Mudzengi  
☐ Kashmira Nirghin  
☐ Kessia Maitland  
☐ Kim Engelbrecht  
☐ Lucky Mawuye  
☐ Malory Allibon  
☐ Marc Repsold  
☐ Marius Engelbrecht

**Contact**  
 \* Full name: Joel Reeds  
 \* Telephone: 031 210 455  
 Email: joelreeds@gmail.com

**Address**  
 Existing New  
 Address Line 1: 12 Selby Court  
 Address Line 2: 7 Colinton Rd  
 Suburb: Gillits  
 City: Durban  
 Province/State: KZN  
 Post Code: 4000  
 Country: RSA

**Case**  
 \* Subject: Market New Products  
 Information: Market New Products  
 \* Value: 200000  
 Case Type: New Customer  
 Source Type: Referral

**Related Customers**  
 Related Customers: Hope Works: HOP0001  
 Hope Works: HOP0001

**Next Activity**  
 \* Salesman: Judith Mudzengi  
 \* Type: Phone call  
 \* Subject: Market New Products  
 Comments: Market New Products

**Activity Attendees**  
 Attendees: John Smith: Hope Works  
 John Smith  
 Page 1 of 1 (1 items) [1] [2] [3]  
 Send Email Invites ☐ \*note that invitations can only be sent to attendees with valid email addresses

**Schedule**  
 When: 12 Sep 2019 from 11:00 to 12:00  
 Reminder: Email ☐ SMS ☐ 30 minute before scheduled start

**Submit Options**  
 Show customer after save: ☒ 1  
 2  
 3  
 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

Judith Mudzengi

Create Cold Call

Customer

Customer: Riverside Investments

Rank: ☐ Diamond (5 days)

Reg. No: 789065

Type: Construction

VAT No: 908753637

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  
☐ Derryl Muller  
☐ Debbie Luger  
☐ Derrick Weeder  
☐ Edvell Msaikwa

☒ Judith Mudzengi  
☐ Kashmira Ninghin  
☐ Kessia Maitland  
☐ Kim Engelbrecht  
☐ Lucky Maruyie  
☐ Malory Allibon  
☐ Marc Repsold  
☐ Marius Engebrecht

Contact

Full name: Joel Reads

Telephone: 031 210 455

Email: joelreads@email.com

Address

Existing ☐ New ☐

Address Line 1: 12 Selby Court

Address Line 2: 7 Collinton Rd

Suburb: Gillits

City: Durban

Province/State: KZN

Post Code: 4000

Country: RSA

Case

Subject: Market New Products

Information: Market New Products

Value: 200000

Case Type: New Customer

Source Type: Referral

Related Customers

Related Customers: ☒ Hope Works: HOP0001

☐ Hope Works: HOP0001

Next Activity

Salesman: Judith Mudzengi

Type: Phone call

Subject: Market New Products

Comments: Market New Products

Activity Attendees

Attendees: ☒ John Smith: Hope Works

☐ John Smith

Page 1 of 1 (1 item) [1] [2] [3]

Send Email Invites ☐ \*note that invitations can only be sent to attendees with valid email addresses

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

## SAVE

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

CRM BPO2 Test Environment

Judith Mudzengi

Create Cold Call

Customer

Customer: Riverside Investments

Rank: ☐ Diamond (5 days)

Reg. No: 789065

Type: Construction

VAT No: 908753637

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  
☐ Derryl Muller  
☐ Debbie Lugar  
☐ Derrick Weeder  
☐ Edvell Msaikwa

☒ Judith Mudzengi  
☐ Kashmira Ninghin  
☐ Kessia Maitland  
☐ Kim Engelbrecht  
☐ Lucky Maruyee  
☐ Malory Allibon  
☐ Marc Repsold  
☐ Marius Engebrecht

Contact

Full name: Joel Reads

Telephone: 031 210 455

Email: joelreads@email.com

Address

Existing ☐ New ☒

Address Line 1: 12 Selby Court

Address Line 2: 7 Collinton Rd

Suburb: Gillits

City: Durban

Province/State: KZN

Post Code: 4000

Country: RSA

Case

Subject: Market New Products

Information: Market New Products

Value: 200000

Case Type: New Customer

Source Type: Referral

Related Customers

Related Customers

☒ Hope Works: HOP0001  
☐ Hope Works: HOP0001

Next Activity

Salesman: Judith Mudzengi

Type: Phone call

Subject: Market New Products

Comments: Market New Products

Activity Attendees

Attendees

☒ John Smith: Hope Works  
☐ John Smith

Page 1 of 1 (1 item) [1] [2] [3]

Send Email Invites ☐ \*note that invitations can only be sent to attendees with valid email addresses

Schedule

When: 13 Sep 2019 from 11:00 to 12:00

Reminder: Email ☒ SMS ☐ 30 minutes before scheduled start

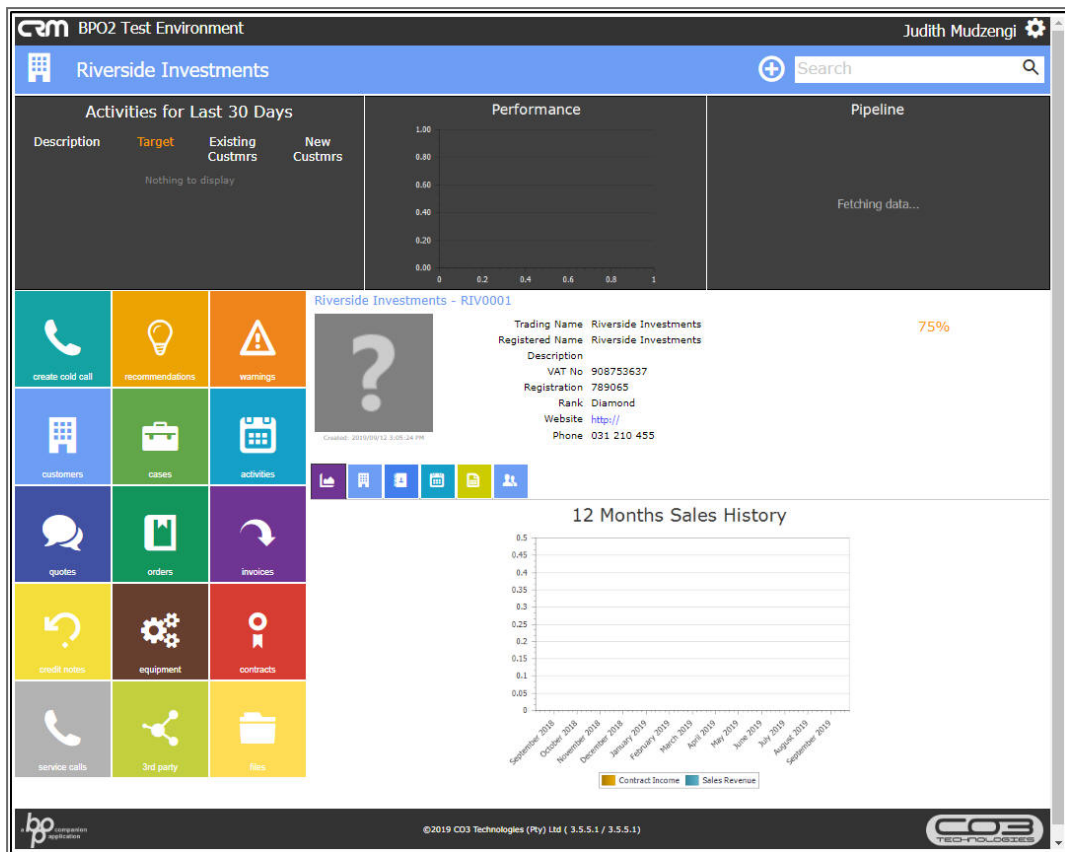
Submit Options

Show customer after save ☒

1

Save

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



## CREATE COLD CALL FOR EXISTING CUSTOMER

### Customer Section

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

CRM BPO2 Test Environment
Judith Mudzengi

Create Cold Call

Customer

Customer

Rank

Reg. No

Type

VAT No

Salesmen

Contact

Full name

Telephone

Email

Address

Case

Subject

Information

Value

Case Type

Source Type

Related Customers

Next Activity

Salesman

Type

Subject

Comments

Activity Attendees

Schedule

When

from

to

Reminder

Email

SMS

30 minutes before scheduled start

Submit Options

Show customer after save

Save

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

**CRM BPO2 Test Environment** Judith Mudzengi

## Create Cold Call

**Customer**

\* Customer: Hop  
 \* Rank: 71505978  
 \* Reg. No: 71506696

**Salesmen**

\* Salesman: 71509577

**Contact**

\* Full name: HOP0001  
 \* Telephone: 71505688

**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

**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: ☒

**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.

**CRM 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**

**Contact**

\* Full name: Contact's full name  
 \* Telephone: Contact's telephone number  
 Email: Email address

**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

**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: 13 Sep 2019 from 11:00 to 12:00  
 Reminder: Email ☐ SMS ☐ 30 minutes before scheduled start

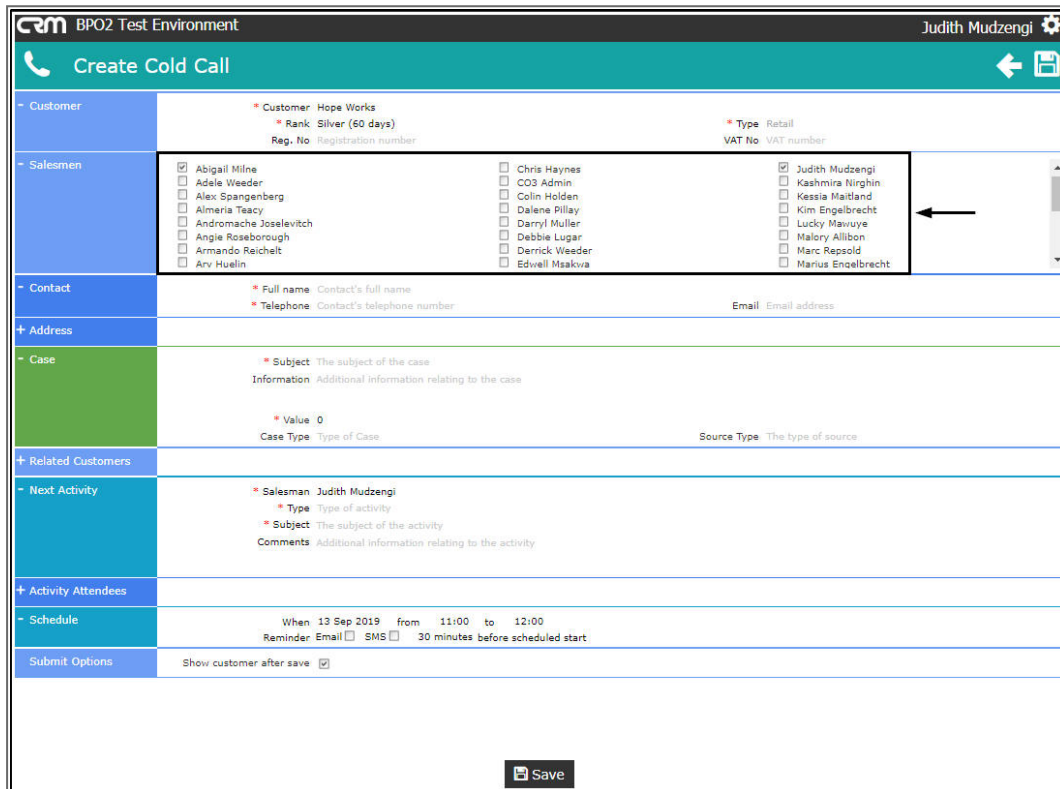
**Submit Options**

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.



**CRM BPO2 Test Environment** Judith Mudzengi

**Create Cold Call**

**Customer**

\* Customer: Hope Works  
 \* Rank: Silver (50 days)  
 \* Type: Retail  
 Reg. No. Registration number VAT No. VAT number

**Salesmen**

<input checked="" type="checkbox"/> Abigail Milne	<input type="checkbox"/> Chris Haynes	<input checked="" type="checkbox"/> Judith Mudzengi
<input type="checkbox"/> Adele Weeder	<input type="checkbox"/> CO3 Admin	<input type="checkbox"/> Kashmira Nigthin
<input type="checkbox"/> Alex Spangenberg	<input type="checkbox"/> Colin Holden	<input type="checkbox"/> Kessia Maitland
<input type="checkbox"/> Almeria Teacy	<input type="checkbox"/> Dalene Pillay	<input type="checkbox"/> Kim Engelbrecht
<input type="checkbox"/> Andromache Joselevitch	<input type="checkbox"/> Darryl Muller	<input type="checkbox"/> Lucky Maruyue
<input type="checkbox"/> Angie Roseborough	<input type="checkbox"/> Debbie Luger	<input type="checkbox"/> Malory Allibon
<input type="checkbox"/> Armando Reichelt	<input type="checkbox"/> Derrick Weeder	<input type="checkbox"/> Marc Repsold
<input type="checkbox"/> Arv Huellin	<input type="checkbox"/> Edvill Msakva	<input type="checkbox"/> Marius Engelbrecht

**Contact**

\* Full name: Contact's full name  
 \* Telephone: Contact's telephone number  
 Email: Email address

**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

**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: 13 Sep 2019 from 11:00 to 12:00  
 Reminder: Email ☐ SMS ☐ 30 minutes before scheduled start

**Submit Options**

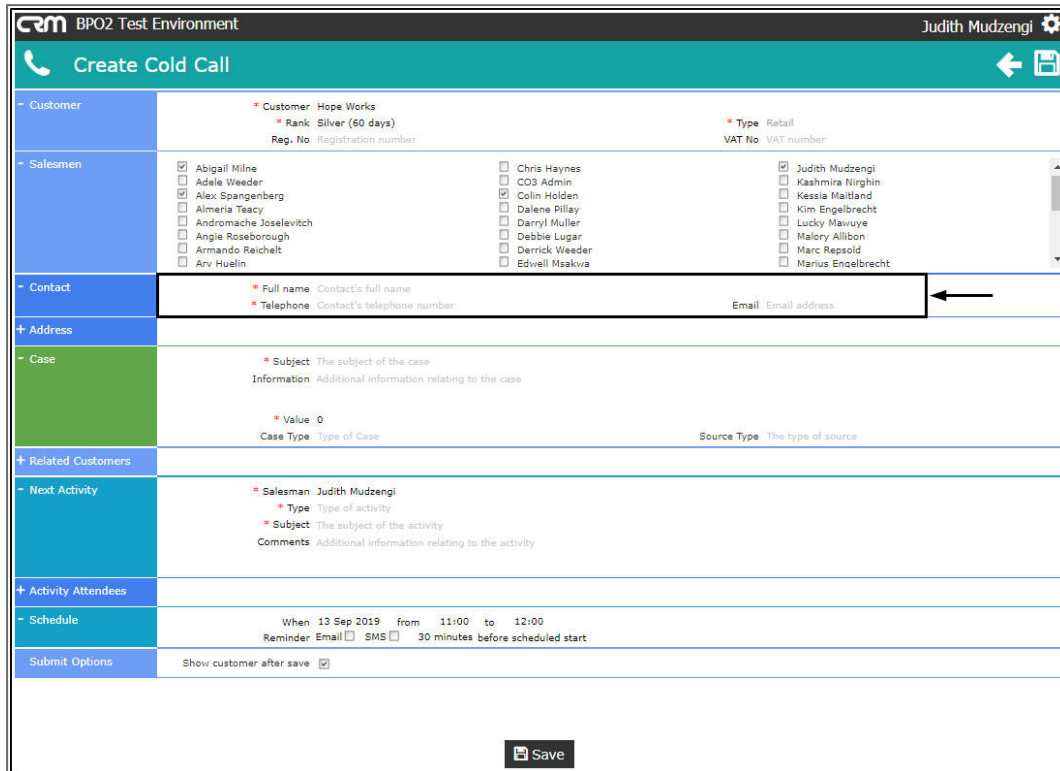
Show customer after save: ☒

**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.

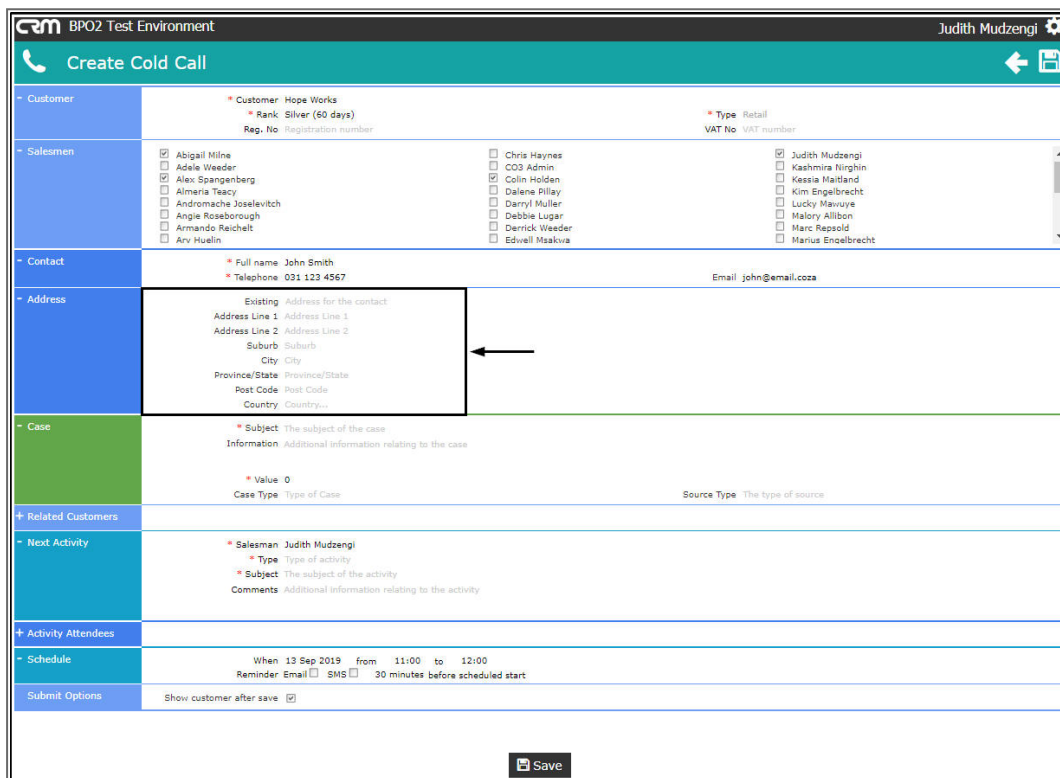
- **Email Address:** This field will auto populate when the customer contact is selected can be edited if required.



## 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.



**CRM BPO2 Test Environment** Judith Mudzengi

## Create Cold Call

**Customer**

\* Customer: Hope Works  
 \* Rank: Silver (60 days)  
 \* Type: Retail  
 Reg. No: Registration number VAT No: VAT number

**Salesmen**

☒ Abigail Milne ☐ Chris Haynes ☒ Judith Mudzengi  
☐ Adele Weeder ☐ CO3 Admin ☐ Kashmira Nirghin  
☒ Alex Spangenberg ☒ Colin Holden ☐ Kessia Maitland  
☐ Almeria Teacy ☐ Dalene Pillay ☐ Kim Engelbrecht  
☐ Andromache Josefowitch ☐ Darryl Muller ☐ Lucky Manoye  
☐ Angie Roseborough ☐ Debbie Luger ☐ Malory Allibon  
☐ Armando Reichelt ☐ Derrick Weeder ☐ Marc Repsold  
☐ Arv Huelin ☐ Edwell Makiwa ☐ Marius Engelbrecht

**Contact**

\* Full name: John Smith  
 \* Telephone: 031 123 4567  
 Email: john@email.co.za

**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: Post Code  
 Country: Country...

**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

**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: 13 Sep 2019 from 11:00 to 12:00  
 Reminder: Email ☐ SMS ☐ 30 minutes 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.

CRM 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  
☐ Adele Weeder  
☐ Alex Spangenberg  
☐ Almeria Teacy  
☐ Andromache Joselevitch  
☐ Angie Roseborough  
☐ Armando Reichelt  
☐ Arv Huellin

☐ Chris Haynes  
☐ CO3 Admin  
☐ Colin Holden  
☐ Dalene Pillay  
☐ Darryl Muller  
☐ Debbie Luger  
☐ Derrick Weeder  
☐ Edweli Maskiva

☒ Judith Mudzengi  
☐ Kashmira Nigthin  
☐ Kessia Matland  
☐ Kim Engelbrecht  
☐ Lucky Mavuye  
☐ Malory Allibon  
☐ Marc Repsold  
☐ Marius Engelbrecht

Contact

Full name: John Smith  
Telephone: 031 123 4567  
Email: john@email.co.za

Address

Existing: 26 Lavender Road  
Address Line 1: 26 Lavender Road  
Address Line 2: New Town  
Suburb: Forest Hills  
City: Durban  
Province/State: KZN  
Post Code: 1234  
Country: South Africa

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

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: 13 Sep 2019 from 11:00 to 12:00  
Reminder: Email ☐ SMS ☐ 30 minutes before scheduled start

Submit Options

Show customer after save: ☒

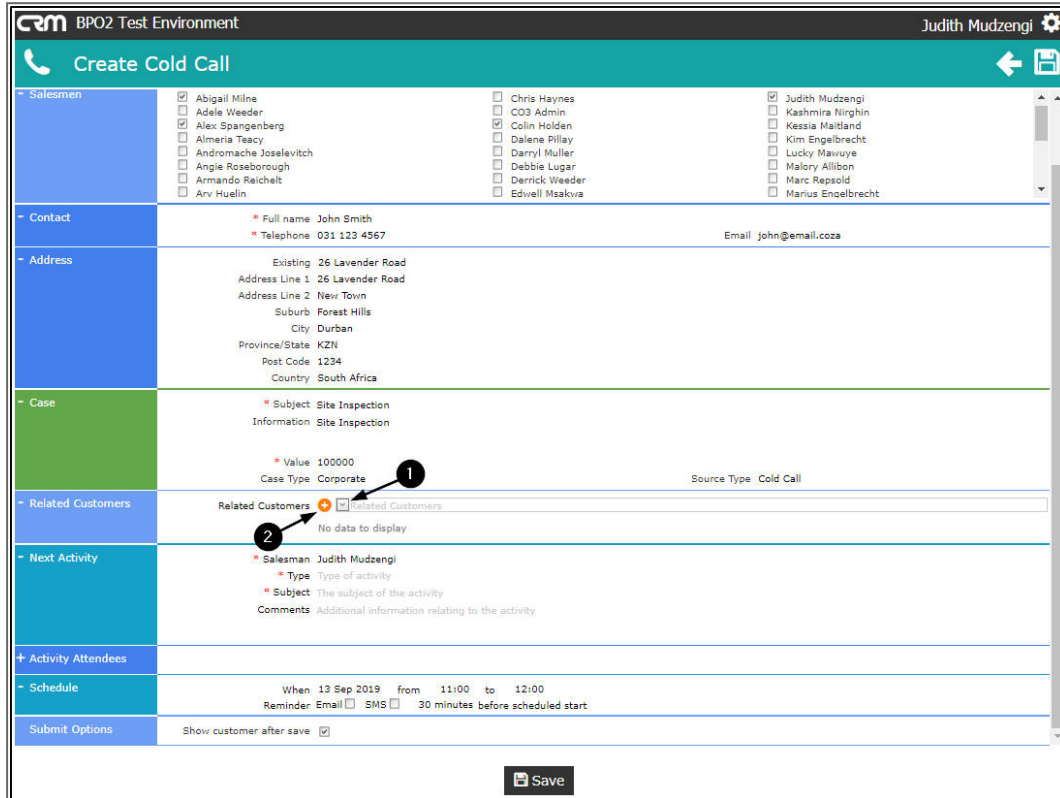
Save

## 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

**Create Cold Call**

**Salesmen**

<input checked="" type="checkbox"/> Abigail Milne	<input type="checkbox"/> Chris Haynes	<input checked="" type="checkbox"/> Judith Mudzengi
<input type="checkbox"/> Adele Weeder	<input type="checkbox"/> CO3 Admin	<input type="checkbox"/> Kashmira Nigbin
<input checked="" type="checkbox"/> Alex Spangenberg	<input type="checkbox"/> Colin Holden	<input type="checkbox"/> Kessia Maitland
<input type="checkbox"/> Almeria Tracy	<input type="checkbox"/> Dalene Pillay	<input type="checkbox"/> Kim Engelbrecht
<input type="checkbox"/> Andromache Joselevitch	<input type="checkbox"/> Darryl Muller	<input type="checkbox"/> Lucky Mavuye
<input type="checkbox"/> Angie Roseborough	<input type="checkbox"/> Debbie Luger	<input type="checkbox"/> Malory Allibon
<input type="checkbox"/> Armando Reichelt	<input type="checkbox"/> Derrick Weeder	<input type="checkbox"/> Marc Repsold
<input type="checkbox"/> Arv Huelin	<input type="checkbox"/> Edvill Maskva	<input type="checkbox"/> Marius Engelbrecht

**Contact**

\* Full name: John Smith  
 \* Telephone: 031 123 4567  
 Email: john@email.co.za

**Address**

Existing: 26 Lavender Road  
 Address Line 1: 26 Lavender Road  
 Address Line 2: New Town  
 Suburb: Forest Hills  
 City: Durban  
 Province/State: KZN  
 Post Code: 1234  
 Country: South Africa

**Case**

\* Subject: Site Inspection  
 Information: Site Inspection  
 \* Value: 100000  
 Case Type: Corporate  
 Source Type: Cold Call

**Related Customers**

Related Customers + Related Customers  
 No data to display

**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: 13 Sep 2019 from 11:00 to 12:00  
 Reminder: Email ☐ SMS ☐ 30 minutes before scheduled start

**Submit Options**

Show customer after save ☒

**Save**

- **Related Customers:**

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

CRM 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  
☐ Adele Weeder  
☒ Alex Spangenberg  
☐ Almeria Teacy  
☐ Andromache Joselevitch  
☐ Angie Roseborough  
☐ Armando Reichelt  
☐ Arvi Huelin

☐ Chris Haynes  
☐ CO3 Admin  
☒ Colin Holden  
☐ Dalene Pillay  
☐ Darryl Muller  
☐ Debbie Luger  
☐ Derrick Weeder  
☐ Edwell Msakiva

☒ Judith Mudzengi  
☐ Kaashira Nigihin  
☐ Kessia Maitland  
☐ Kim Engelbrecht  
☐ Lucky Mawuye  
☐ Malory Allibon  
☐ Marc Reggold  
☐ Marius Engelbrecht

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 New Town

Suburb Forest Hills

City Durban

Province/State KZN

Post Code 1234

Country South Africa

Case

Subject Site Inspection

Information Site Inspection

Value 100000

Case Type Corporate Customer

Source Type Cold Call

Related Customers

Related Customers

JIRA Networked - 71505555

JIRA Networked - 71505555

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 13 Sep 2019 from 11:00 to 12:00

Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

Submit Options

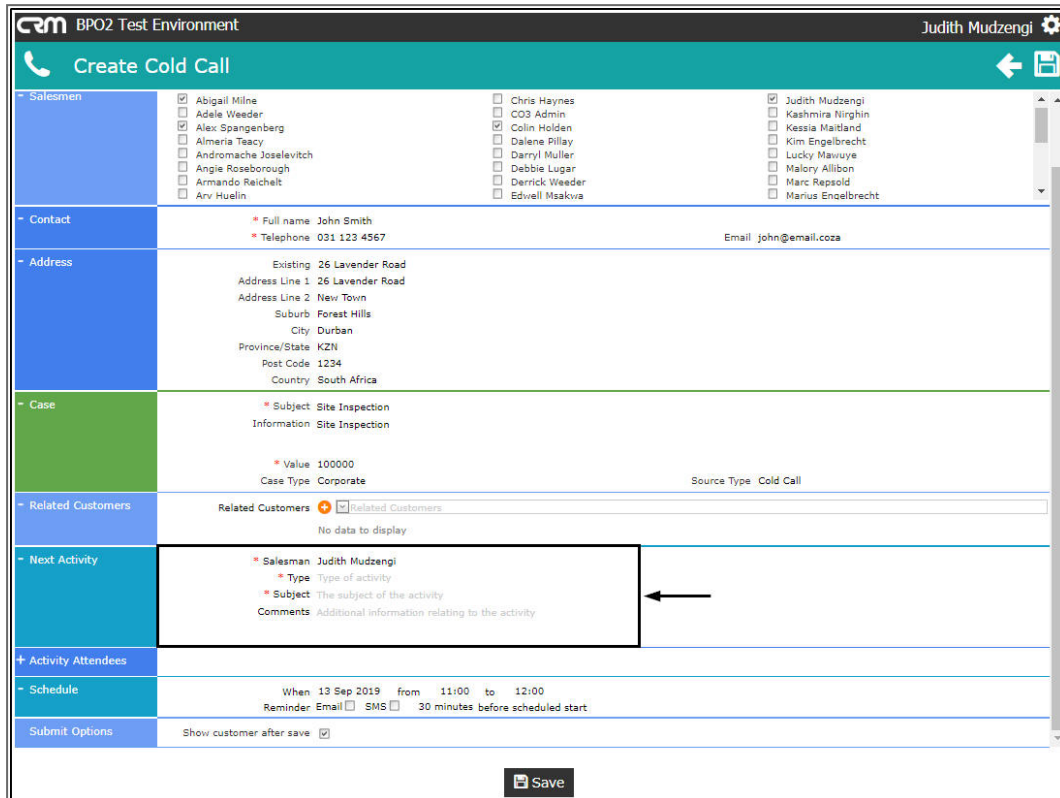
Show customer after save ☒

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.



**CRM BPO2 Test Environment** Judith Mudzengi

**Create Cold Call**

**Salesmen**

<input checked="" type="checkbox"/> Abigail Milne	<input type="checkbox"/> Chris Haynes	<input checked="" type="checkbox"/> Judith Mudzengi
<input type="checkbox"/> Adele Weeder	<input type="checkbox"/> CO3 Admin	<input type="checkbox"/> Kashmiri Nirphin
<input checked="" type="checkbox"/> Alex Spangenberg	<input checked="" type="checkbox"/> Colin Holden	<input type="checkbox"/> Kessia Maitland
<input type="checkbox"/> Almeria Teacy	<input type="checkbox"/> Dalene Pillay	<input type="checkbox"/> Kim Engelbrecht
<input type="checkbox"/> Andromache Joselevitch	<input type="checkbox"/> Darryl Muller	<input type="checkbox"/> Lucky Mavuye
<input type="checkbox"/> Angie Roseborough	<input type="checkbox"/> Debbie Luger	<input type="checkbox"/> Malory Allibon
<input type="checkbox"/> Armando Reichelt	<input type="checkbox"/> Derrick Weeder	<input type="checkbox"/> Marc Rappold
<input type="checkbox"/> Anu Huelin	<input type="checkbox"/> Edvill Mskiva	<input type="checkbox"/> Marius Engelbrecht

**Contact**

\* Full name John Smith  
 \* Telephone 031 123 4567  
 Email john@email.co.za

**Address**

Existing 26 Lavender Road  
 Address Line 1 26 Lavender Road  
 Address Line 2 New Town  
 Suburb Forest Hills  
 City Durban  
 Province/State KZN  
 Post Code 1234  
 Country South Africa

**Case**

\* Subject Site Inspection  
 Information Site Inspection  
 \* Value 100000  
 Case Type Corporate  
 Source Type Cold Call

**Related Customers**

Related Customers + Related Customers  
 No data to display

**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 13 Sep 2019 from 11:00 to 12:00  
 Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

**Submit Options**

Show customer after save ☒

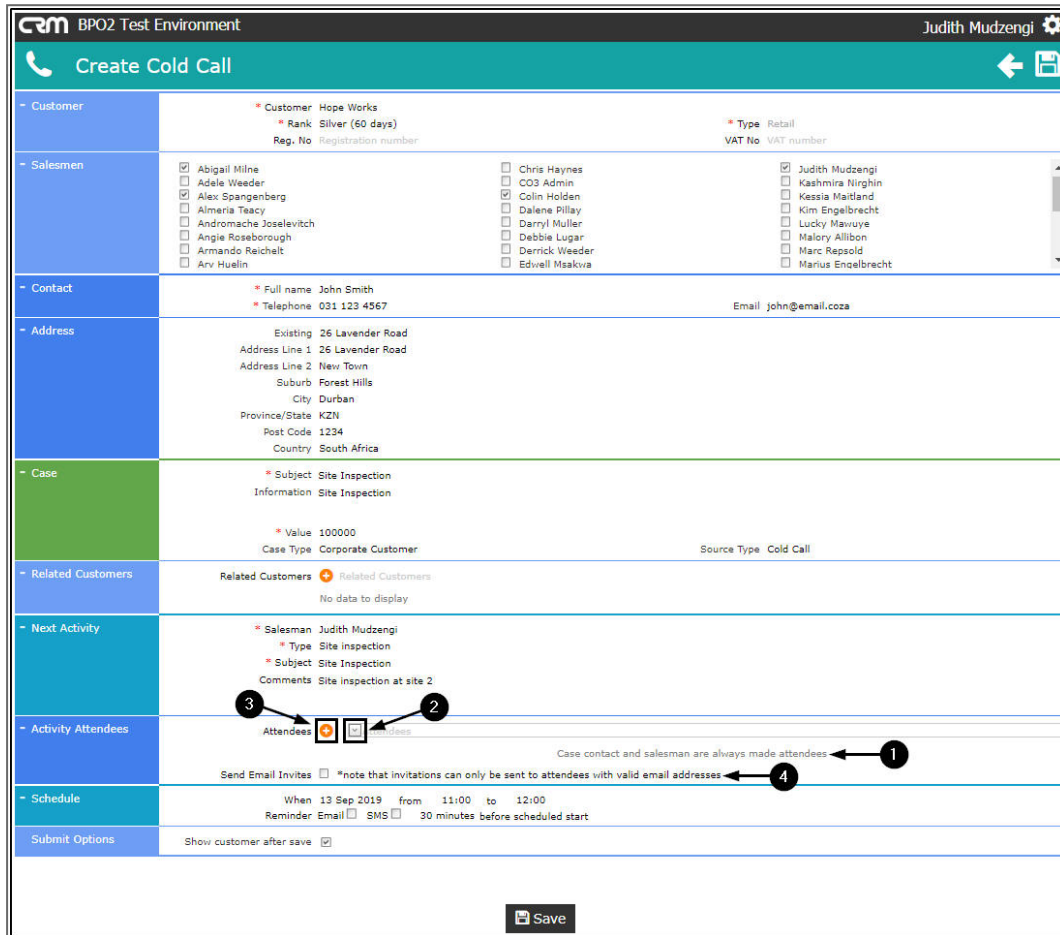
**Save**

## 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).
  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 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 .



**CRM 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  
☐ Adele Weeder  
☒ Alex Spangenberg  
☐ Almeria Teacy  
☐ Andromache Joselevitch  
☐ Angie Roseborough  
☐ Armando Reichalt  
☐ Arv Huelin  
☐ Chris Haynes  
☐ CO3 Admin  
☒ Colin Holden  
☐ Dalene Pillay  
☐ Darryl Muller  
☐ Debbie Lugar  
☐ Derrick Weeder  
☐ Edwell Msakva  
☒ Judith Mudzengi  
☐ Kashmira Ntshini  
☐ Kessia Maitland  
☐ Kim Engelbrecht  
☐ Lucky Mavuye  
☐ Malory Allibon  
☐ Marc Repsold  
☐ Marius Engelbrecht

**Contact**

\* Full name John Smith  
 \* Telephone 031 123 4567  
 Email john@email.co.za

**Address**

Existing 26 Lavender Road  
 Address Line 1 26 Lavender Road  
 Address Line 2 New Town  
 Suburb Forest Hills  
 City Durban  
 Province/State KZN  
 Post Code 1234  
 Country South Africa

**Case**

\* Subject Site Inspection  
 Information Site Inspection  
 \* Value 100000  
 Case Type Corporate Customer  
 Source Type Cold Call



**Related Customers**

Related Customers + Related Customers  
 No data to display

**Next Activity**

\* Salesman Judith Mudzengi  
 \* Type Site Inspection  
 \* Subject Site Inspection  
 Comments Site inspection at site 2

**Activity Attendees**

Attendees   Attendees  
 Case contact and salesman are always made attendees  
 Send Email Invites ☐ \*note that invitations can only be sent to attendees with valid email addresses

**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**

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

CRM 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  
☐ 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 Luger  
☐ Derrick Weeder  
☐ Edwell Msakiva

☒ Judith Mudzengi  
☐ Kashmira Nirghin  
☐ Kessia Maitland  
☐ Kim Engelbrecht  
☐ Lucky Mavuye  
☐ Malory Allibon  
☐ Marc Rapsold  
☐ Marius Engelbrecht

Contact

\* Full name: John Smith  
\* Telephone: 031 123 4567  
Email: john@email.co.za

Address

Existing: 26 Lavender Road  
Address Line 1: 26 Lavender Road  
Address Line 2: New Town  
Suburb: Forest Hills  
City: Durban  
Province/State: KZN  
Post Code: 1234  
Country: South Africa

Case

\* Subject: Site Inspection  
Information: Site Inspection  
\* Value: 100000  
Case Type: Corporate Customer  
Source Type: Cold Call

Related Customers

Related Customers + Related Customers  
No data to display

Next Activity

\* Salesman: Judith Mudzengi  
\* Type: Site Inspection  
\* Subject: Site Inspection  
Comments: Site inspection at site 2

Activity Attendees

Attendees + Abigail Milne  
Abigail Milne

Send Email Invites ☐ \*note that invitations can only be sent to attendees with valid email addresses

Schedule

When: 13 Sep 2019 from 11:00 to 12:00  
Reminder: Email ☐ SMS ☐ 30 minutes before scheduled start

Submit Options

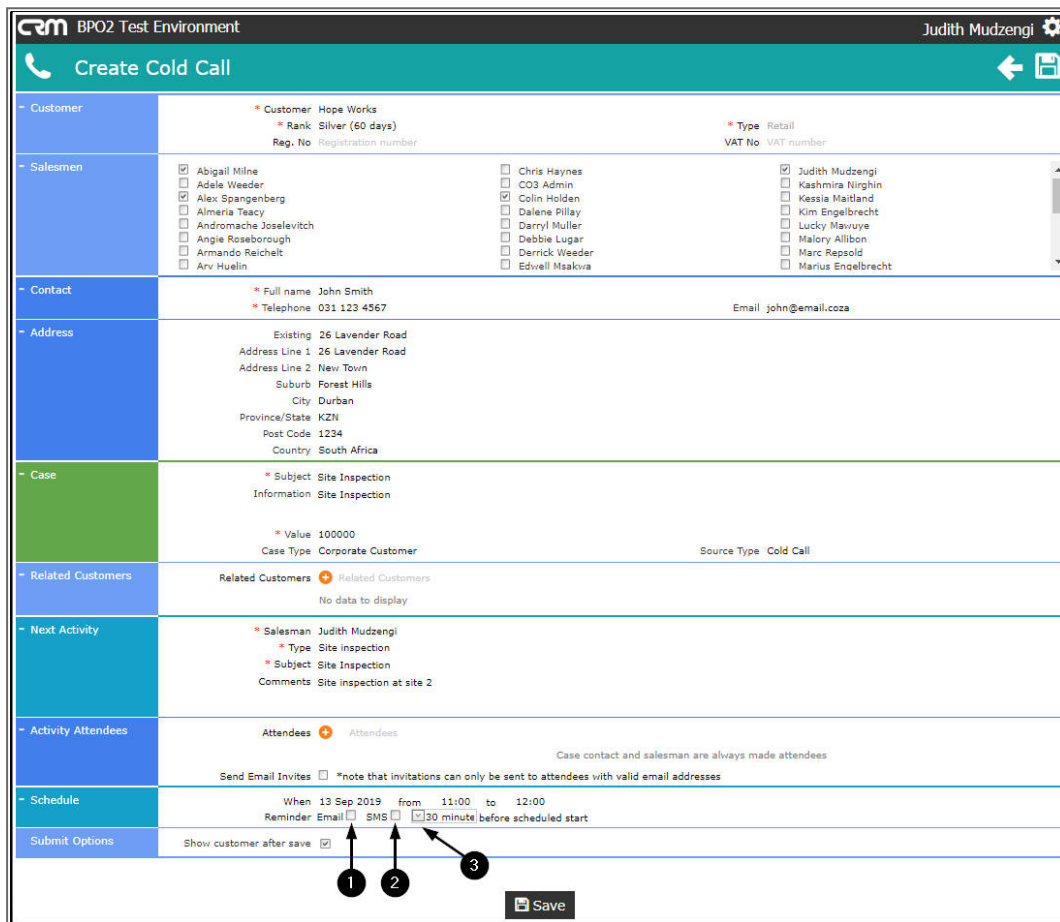
Show customer after save ☒

Save

## 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** .



**CRM 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  
☐ Adele Weeder  
☒ Alex Spangenberg  
☐ Almeria Teacy  
☐ Andromache Joselevitch  
☐ Angie Roseborough  
☐ Armando Reichelt  
☐ Arv Huellin  
☐ Chris Haynes  
☐ CO3 Admin  
☒ Colin Holden  
☐ Dalene Pillay  
☐ Darryl Muller  
☐ Debbie Luger  
☐ Derrick Weeder  
☐ Edwell Msakva  
☒ Judith Mudzengi  
☐ Kashmira Ntshini  
☐ Kessia Maitland  
☐ Kim Engelbrecht  
☐ Lucky Mavuye  
☐ Malory Allibon  
☐ Marc Repsold  
☐ Marius Engelbrecht

**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: New Town  
 Suburb: Forest Hills  
 City: Durban  
 Province/State: KZN  
 Post Code: 1234  
 Country: South Africa

**Case**  
 \* Subject: Site Inspection  
 Information: Site Inspection  
 \* Value: 100000  
 Case Type: Corporate Customer  
 Source Type: Cold Call

**Related Customers**  
 Related Customers + Related Customers  
 No data to display

**Next Activity**  
 \* Salesman: Judith Mudzengi  
 \* Type: Site Inspection  
 \* Subject: Site Inspection  
 Comments: Site inspection at site 2

**Activity Attendees**  
 Attendees + Attendees  
 Case contact and salesman are always made attendees  
 Send Email Invites ☐ \*note that invitations can only be sent to attendees with valid email addresses

**Schedule**  
 When: 13 Sep 2019 from 11:00 to 12:00  
 Reminder: Email ☐ SMS ☐ 30 minute before scheduled start

**Submit Options**  
 Show customer after save ☒

**Save**

## 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.

CRM BPO2 Test Environment

Judith Mudzengi

Create Cold Call

Customer

\* Customer: Hope Works

\* Rank: Silver (60 days)

\* Type: Retail

Reg. No. Registration number

VAT No. VAT number

Salesmen

☒ Abigail Milne  
☐ Adele Weeder  
☒ Alex Spangenberg  
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☐ Lucky Mawuye  
☐ Malory Allibon  
☐ Marc Repsold  
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Contact

\* Full name: John Smith

\* Telephone: 031 123 4567

Email: john@email.co.za

Address

Existing: 26 Lavender Road

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Suburb: Forest Hills

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Province/State: KZN

Post Code: 1234

Country: South Africa

Case

\* Subject: Site Inspection

Information: Site Inspection

\* Value: 100000

Case Type: Corporate Customer

Source Type: Cold Call

Related Customers

Related Customers + Related Customers

No data to display

Next Activity

\* Salesman: Judith Mudzengi

\* Type: Site inspection

\* Subject: Site Inspection

Comments: Site inspection at site 2

Activity Attendees

Attendees + Attendees

Case contact and salesman are always made attendees

Send Email Invites: ☐ \*note that invitations can only be sent to attendees with valid email addresses

Schedule

When: 16 Sep 2019 from 11:00 to 12:00

Reminder: Email ☒ SMS ☐ 15 minutes before scheduled start

Submit Options

Show customer after save: ☒

Save

## Save

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



CRM 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  
☐ Adele Weeder  
☒ Alex Spangenberg  
☐ Almeria Teacy  
☐ Andromache Joselevitch  
☐ Angie Roseborough  
☐ Armando Reichelt  
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☐ Darryl Muller  
☐ Debbie Lugar  
☐ Derrick Weeder  
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☐ Kessia Maitland  
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Case

Subject: Site Inspection

Information: Site Inspection

Value: 100000

Case Type: Corporate Customer

Source Type: Cold Call

Related Customers

Related Customers + Related Customers

No data to display

Next Activity

Salesman: Judith Mudzengi

Type: Site inspection

Subject: Site Inspection

Comments: Site inspection at site 2

Activity Attendees

Attendees + Attendees

Case contact and salesman are always made attendees

Send Email Invites: ☐ \*note that invitations can only be sent to attendees with valid email addresses

Schedule

When: 16 Sep 2019 from 11:00 to 12:00

Reminder: Email ☒ SMS ☐ 15 minutes before scheduled start

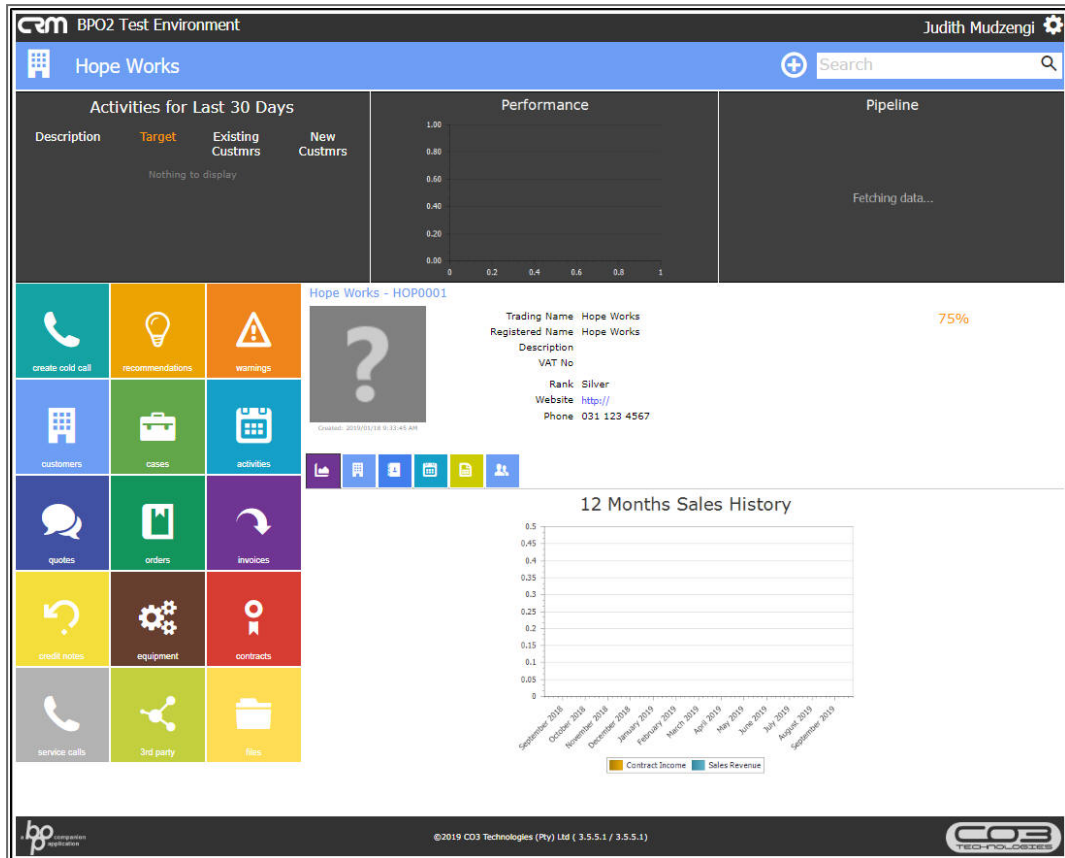
Submit Options

Show customer after save: ☒

1

Save

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



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