

CRM BASICS

ACTIVITIES

In CRM, an activity is any type of interaction that involves your customer:

- A Call
- An Email
- A Meeting
- An On-Site Inspection

Client specific activities can be accessed from Customer Homepage.

A full list of <u>all</u> customers activities can be accessed from the **Homepage** as set out below.

Access: Webpage > http://[servername]:[portno]/BPOCRM/User.aspx

CUSTOMERS ACTIVITIES FROM THE HOMEPAGE

- 1. Click on the *Activities* tile in the *Homepage*.
- 2. The *number* in the top right of this tile shows you the amount of open activities.



CCM BPO2 Test Environment Judith Mudzengi 🌣					
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Activities for Last 30 Days Description Target Existing New Custurns Custurns Nothing to display	Performance 1.00 0.00	Pipeline Fetching data			
Create call all recommendations	Calendar Schedule Date Schedule Date Ction - Hope Works: contract signal Who: 10 Aug 2019, 11:00-12:00 Who: 2019 Saffar Terral: joingemail.com Email: joingemail.com e (1) > mail	Cell: Bus: 031 123 4567 Page size: 10 v			
	©2019 CO3 Technologies (Pty) Ltd (3.5.5.1 / 3.5.5.1)				

MY ACTIVITIES PAGE

- My Activities page will be open.
- A list of activities will be displayed (where you have open activities).

CCM BPO2 Test Environment	Judith Mudzengi 🌣 📤
🛗 My Activities	↔ 0
Schedule Date	Status
Phone call - Build Construction: New products When: 20 Aug 2019, 16:00-16:28 Who: John Holland, Build Construction Tel: 031 456 789 Email: Site inspection - Hope Works; contract signing	Cell: Bus: 031 456 789
When: 19 Aug 2019, 11:00-12:00 Who: John Smith, Hope Works Tel: 031 123 4567 Email: john@email.coza	Cell: Bus: 031 123 4567
Meeting - 24 Hour HCCP: First Meeting When: 7 Aug 2019, 16:00-17:00 Who: Tandi De Jager, 24 Hour HCCP Tel: 031 448 4476 Email: Tandi@customer10337.com Page 1 of 1 (3 items)	Cell: 083 448 4476 Bus: 031 448 4476 Page size: 10 🔽



- *Action* buttons are available by hovering over an *Activity*, and the options are:
 - Reschedule this Activity
 - View / Edit Activity
 - Close this Case
 - View Case Info and History
 - View Customer
 - Next Action (close current activity and create new activity)

CCM BPO2 Test Environment		Judith Mudzengi 🌣	*
🛗 My Activities		← 0	
	Schedule Date	Status	
 Phone call - Build Construction: New products When: 20 Aug 2019, 16:00-16:28 Who: John Holland, Build Construction Tel: 031 456 789 Email: Site inspection - Hope Works: contract signing When: 19 Aug 2019, 11:00-12:00 When: 19 Aug 2019, 11:00-12:00 When: 19 Aug 2019, 11:00-12:00 When: 19 Aug 2019, 15:00-17:00 When: 7 Aug 2019, 16:00-17:00 When: 7 Aug 476 Email: 1031 448 476 Email: 10	Cel Bus Cel	s: 031 456 789	

• Click on an *Activity* to access a quick view summary of the activity information.



CRM BPO2 Test E	invironment	:	Judith Mudzengi 🔅 📤
🛗 My Activi	ties		€ Ø
	Schedule Date		Status
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Site inspection - H Who: Who: Tel: Email: Where: Case:	ope Works: contract signing 19 Aug 2019, 11:00-12:00 John Smith, Hope Works 031 123 4567 John@email.coza contract signing contract signing	Cell: Bus: 031 123 /	
When: Who: Tel:	HCCP: First Meeting 7 Aug 2019, 16:00-17:00 Tandi De Jager, 24 Hour HCCP 031 448 4476 Tandi@customer10337.com mi@Home.aspx	Cell: 083 448 4 Bus: 031 448 4	

ACTION BUTTONS

- 1. Hover over an activity.
- 2. *Action* buttons will be displayed.

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Schedule Date	Status
Phone call - Build Construction: New products When: 20 Aug 2019, 16:00-16:28 Who: John Holland, Build Construction Tel: 031 456 789 Email:	Cell: Bus: 031 456 789
Site inspection - Hope Works: contract signing When: 19 Aug 2019, 11:00-12:00 Who: John Smith, Hope Works Tel: 031 123 4567 Email: john@email.coza	Cell: Bus: 031 123 4567
Meeting - 24 Hour HCCP: First Meeting When: 7 Aug 2019, 16:00-17:00 Who: Thad De Jager, 24 Hour HCCP Tel: 031 448 4476 Email: Thad@customer10337.com Page 1 of 1 (3 Rems) © < [1] 2 (b) All	Cell: 083 448 4476 Bus: 031 448 4476 Page size: 10 💌

VIEW / EDIT ACTIVITY

• Click on the View / Edit this Activity icon.



CCM BPO2 Test Environment	Judith Mudzengi 🍄 📤
🛗 My Activities	♦ Ø
Schedule Date	Status
Phone call - Build Construction: New products When: 20 Aug 2019, 16:00-16:28 Who: John Holland, Build Construction Tel: 031 456 789 Email:	Cell: Bus: 031456 789
Site inspection - Hope Works: contract signing When: 19 Aug 2019, 11:00-12:00 Who: John Smith, Hope Works Tel: 031 123 4567 Email: John@email.coza	Cell: Bus: 031 123 4567
Meeting - 24 Hour HCCP: First Meeting When: 7 Aug 2019, 16:00-17:00 Who: Tandl De Jager, 24 Hour HCCP Tel: 031 448 4476 Email: Tandl@customer10337.com	Cell: 083 448 4476 Bus: 031 448 4476
Page 1 of 1 (3 items) @ < [1] > >> All	Page size: 10 💌

Save Activity

- The *Save Activity* screen will be displayed.
 - Click on the ' + ' sign to view more details or the ' sign to view less details.

CCM BPO2 Test	Environment	Judith Mudzengi 🌣
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- Case State	 Case State Distant prospect - on hold (5%) Percentage 5% 	
- Activity	* Type Phone call Address 23 Roldock Road Upper Highway Gillits Durban KZN * Subject New products Comments New products	
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Schedule	Date 22 Aug 2019 from 15:00 to 15:30 Reminder Email ፼ SMS □ 30 minutes before scheduled start	
+ Quote	🖺 Save	

1. CASE DETAILS

• **Customer** : The customer will auto populate. This field cannot be edited.



- **Contact** : The contact will auto populate. Click in this field to display a list of all the contacts linked to the selected customer. Select the relevant contact if applicable.
- **Salesman** : The salesman will auto populate. This field cannot be edited.
- *Subject* : Delete and type in the relevant subject if applicable.
- *Information* : Delete and type in the relevant information if applicable.

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- Case State	* Case State Distant prospect - on hold (5%) Percentage 5%
- Activity	* Type Pione call Address 23 Rodock Road Upper Highway Gillits Durban KZN * Subject Here products Comments Here products
Activity Attendees	Attendees
Schedule	Date 22 Aug 2019 from 15:00 to 15:30 Reminder Email® SMS 0 minutes before scheduled start
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	■ Save

1. Case Details Continue

- *Value* : Type in or edit the estimated value if required.
- *Case Type* : The case type will auto populate. This field cannot be edited.
- *Case Date* : Click on the drop-down arrow and select the required date from the calender if applicable.



- *Source Type* : Click in this field to display a list of all source types and select the required source type if applicable.
- *Expected Completion* : Click on the drop-down arrow and select the required date if applicable.
- 2.
- *Attachments* : You can add (hyperlink needed 000.014) an attachment if applicable.0
- 3.
- *Attachments* : You can also delete an attachment by clicking on the *Delete* icon if applicable.

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- Case		* Customer Build Construction * Contract Clerk Zolvie * Salesman Judit Mudangi * Subject New comment products Information New comment products	
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Scheo	dule	Date 22 Aug 2019 from 15100 to 15130 Reminder Email	
+ Quote	e		
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- A message box will pop up asking you;
 - Are you sure you want to remove the attachment from the case? You cannot undo this action.
- Click on Ok.



CCM BPO2 Test E Save Act	Customer Build Construction Contact Clere Zodva Salesman Jointh Hudzengi Subject New cement products	192.168.100.150:60005 says Are you sure you want to remove this attachment from the case? You cannot undo this action. OK Cancel	Judith Mudzengi 🕻 🔶 📔
	Information New cement products * Value 130000.0000 Case Tipe OMACTNEWC Case Data 23 Aug 2019 Attachments Attached Files Please note, new files v contract.dock	vill only be added to the case when it is saved. If an attachment with the same name alread	Source Type Referral Excected Completion 30 Aug 2019 Browsee. dy exists, the current date and time will be appended to the file name.
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• The attachment will be removed from the *Case* section.

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1.



• *Related Customers* : You can add related customers if applicable. (hyperlink needed 000.014)

2.

• *Related Customers* : You can delete a related customer if applicable by clicking on the *Delete* icon.

ດຈາ	BPO2 Test Envir	onment		Judith Mudzengi 🍄
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- A message box will pop up asking you;
 - Are you sure you want to remove this customer from the case? All this customer's contacts will also be removed from activity attendees.
- Click on Ok.



CCM BPO2 Test I	"Ontact Clere Zolve * Salesman Judih Mudzenji * Subject New cament produkts Information New cament produkts	192.168.100.150:60005 says Are you sure you want to remove this customer from the case? All this customer's contacts will also be removed from activity attendees. OK Cancel	Judith Mudzengi 🌣 🗲 🗎
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- Activity	* Type Phone call Address 23 Roldock Road Upper * Subject New products Comments New products	Highway Gillits Durban KZN	
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• The customer will be removed from the *Related Customers* section.

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- Case State	 Case State Distant prospect - on hold (5%) Parcentage 5% 	
- Activity	" Type Phone call Address 23 Roldock Road Upper Highway Gillitz Durban KZN " Subject New products Comments New products	
Activity Attendees	Attandes 💿 Attandess Luddh Mudsangi Clara Zodva John Kolland Age 1 (2 hang) (1) (2) (2) Send Email Invites — nonly be sent to attandees with valid email addresses	10 V
Schedule	Date 22 Aug 2019 from 15:00 to 15:30 Reminder Email® SMS 30 minutes before scheduled start	
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Case State Details

- *Case State* : Click in this field to display a list of all the Case States Descriptions and their Percentages on the system. Select the relevant description if applicable.
- **Percentage** : This field will populate according to the Case State selected.

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Save Acti	y .	🔶 🗎
- Case	Customer Build Construction Contact Clere Zodua Saleman Judth Mudsangi Subject New cement products Information New cement products Information New cement products Source Type Referral Case Type Extend Them Construction Case Type Extend Them Completion 30 Aug 2019 Attachments Attachments Attachments	Browse
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Schedule	Date 22 Aug 2019 from 15:00 to 15:00 Reminder Email® SMS 30 minutes before scheduled start	
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Activity Details

- *Type* : The type will auto populate. This field cannot be edited.
- Address : Click in the Address field, a list of all addresses linked to the customer will be displayed.
 Select the relevant address from this list if applicable.



- *Subject* : Edit the subject if applicable.
- *Comments* : Edit the comments if applicable.

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- Case	Customer Build Construction Contact Citre Zodya Seleman Judit Mudengi Subject New coment products Information New coment products Value 150000.0000 Case Type Referral Case Date 23 Aug 2015 Attachment Attachment Mass 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.	Browse
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Activity Attendees

- 1. *Attendees* : You can link additional attendees if applicable. (hyperlink needed 000.014)
- 2. *Send Email Invites* : Tick the checkbox if you wish to send email invites. Untick the checkbox if you do not wish to send email invites.
- Attendees : You can delete an additional attendee (one who is not the case salesman or case customer contact) if applicable by clicking on the *Delete* icon.



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- Case	Customer Build Construction Contact Clere Zodvia Subject New cement products Information New cement products Information New cement products Subject New cement products Case Type Competition 30 Aug 2019 Case Type Competition 30 Aug 2019 Attachment Attachment 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.
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- A message box will pop up asking you;
 - Are you sure you want to remove this attendee from the activity?
- Click on Ok.



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• The attendee will be removed from the *Activity Attendee* section.

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Scheduling

- 1. **Date** : You can change the scheduled date and or the time if applicable.
- 2. *Reminder* : Select either Email or SMS by ticking the relevant check box if applicable.
- 3. *Reminder (Time Period)* : Hover over the field, a *down arrow* will be displayed. Click on the *down arrow* and select the relevant time period from the *drop-down menu* if applicable.

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Quote Details

• You can edit quote details if applicable.



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Save Changes

- 1. Click on either the *Save* button or
- 2. Save icon.



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Quote Items	Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print
	1	INVN	2HS08110	ACTUATOR MPF	1		0.00	0.00	1131.78		1131.78	0	1301.54	
			FS-1018MFP	FS 1018MFP	1	0.00	0.00	0.00	726.18	726.18	726.18	0	835.11 2136.65	

• You will return to the *My Activities* screen.

CM BPO2 Test Environment	Judith Mudze	ngi 🍄 î
🛗 My Activities		- O
Schedule Date	Sta	itus
Meeting - Hope Works: Meeting When: 22 Aug 2019, 15:00-17:00 Who: John Smith, Hope Works Tel: 031 123 4567 Email: john@email.cora	Cell: Bus: 031 123 4567	
Phone call - Build Construction: Market new products When: 22 Aug 2019, 15:00-15:30 Who: Cifere Zodwa, Build Construction Tel: 031 455 798 Email: conregmentation	Cell: 060 251 451 Bus: 031 456 789	
Site inspection - Hope Works: contract signing When: 19 Aug 2019, 11:00-12:00 Who: John Smith, Hope Works Tel: 031 123 4567 Email: john@email.coza	Cell: Bus: 031 123 4567	
Meeting - 24 Hour HCCP: First Meeting When: 7 Aug 2019, 16:00-17:00 Who: Tand DE Jager, 24 Hour HCCP Tel: 031 448 4476 Email: Tandi@customer10337.com	Cell: 083 448 4476 Bus: 031 448 4476	
Page 1 of 1 (4 items) (c) (c) (1) (2) (b) (d)	Page size	: 10 🗸

RESCHEDULE AN ACTIVITY

• Click on the *Reschedule this Activity* icon.



CCM BPO2 Test Environment	Judith Mudzengi 🍄 👚
🛗 My Activities	♦ Ø
Schedule Date	Status
Phone call - Build Construction: New products When: 20 Aug 2019, 16:00-16:28 Who: John Holland, Build Construction Tel: 0311 456 789 Email:	Cell: Bus: 031 456 789 ➡
Site inspection - Hope Works: contract signing When: 19 Aug 2019, 11:00-12:00 Who: John Smith, Hope Works Tel: 031 123 4567 Email: john@email.coza	Cell: Bus: 031 123 4567
Meeting - 24 Hour HCCP: First Meeting When: 7 Aug 2019, 16:00-17:00 Who: Tandi De Jager, 24 Hour HCCP Tel: 031 443 4476 Email: Tandi@customer10337.com	Cell: 083 448 4476 Bus: 031 448 4476
Page 1 of 1 (3 items) (C ([1]))) All	Page size: 10 🔍

• The *Save Activity* screen will be displayed.

CCM BPO2 Test F	Environment		Judith Mudzengi 🌣
📞 Save Activity			🔶 🗎
+ Case	Subject	New products	
- Case State	* Case State Percentage	Distant prospect - on hold (5%) 5%	
- Activity	Address * Subject	Phone call 23 Roldock Road Upper Highway Gillits Durban KZN New products New products	
Activity Attendees	Attendees Send Email Invites	Judith Mudzengi Judith Mudzengi John Holland Page 1 of 1 (2 items) C [1] >	Page size: 10 🗸
Schedule		20 Aug 2019 from 16:00 to 16:28 Email ☑ SMS ☐ 30 minutes before scheduled start	
+ Quote			
		🗄 Save	

- 1. Go to the *Schedule* section.
- 2. You can adjust the date and or
- 3. time.



CCM BPO2 Test I	Environment		Judith Mudzengi 🌣
📞 Save Act	ivity		🗲 🗎
+ Case	Subject	New products	
- Case State	* Case State Percentage	Distant prospect - on hold (5%) 5%	
- Activity	Address * Subject	Phone call 23 Roldock Road Upper Highway Gillits Durban KZN New products New products	
Activity Attendees	Attendees	 ♥ ♥ Judith Mudzengi ♥ John Holland Page 1 of 1 (2 items) < [1] > /// 	Page size: 10 💌
Schedule	2 Date	*note that invitations can only be sent to attendees with valid email addresses 20 Aug 2019 [from 16:00 to 16:28] Top SMS 30 minutes before scheduled start	
+ Quote			
		E Save	

Adjust the Date

1. Hover over the *Date* field, a *down arrow* will be displayed. Click on this *arrow*.

CCM BPO2 Test B	CCM BPO2 Test Environment Ju		
📞 Save Act			+ 🗎
+ Case	Subject	New products	
- Case State	* Case State Percentage	Distant prospect - on hold (5%) 5%	
- Activity	Address * Subject	Phone call 23 Roldock Road Upper Highway Gillits Durban KZN New products New products	
Activity Attendees		Judith Mudzengi John Holland Page 1 of 1 (2 items) ([1]) ** *note that invitations can only be sent to attendees with valid email addresses	Page size: 10 🖂
Schedule	Date	≥ 20 Aug 2019 from 16:00 to 16:28	
+ Quote		D Save	



- 1. A *calendar* will pop up.
- 2. Select the relevant date.

CCM BPO2 Test E	Environment		Judith Mudzengi 🌣
📞 Save Act	ivity		🔶 🗎
+ Case	Subject	New products	
- Case State	Case State Percentage	Distant prospect - on hold (5%) 5%	
- Activity	Address	Phone call 23 Roldock Road Upper Highway Gillits Durban KZN New products <u>K K August 2019 > > > > > > Sun Mon Tue Wed Thu Fri Sat</u>	
Activity Attendees	Send Email Invites	$\begin{array}{c ccccccccccccccccccccccccccccccccccc$	Page size: 10 🗸
Schedule		The date is form from 16:00 to 16:28 Email 🗹 SMS 🗌 30 minutes before scheduled start	
+ Quote			
		B Save	

• The *Date* field will now be populated with the selected date.

CCM BPO2 Test B	Environment		Judith Mudzengi 🌣
📞 Save Act	ivity		🗲 🗎
+ Case	Subject	New products	*
- Case State	* Case State Percentage	Distant prospect - on hold (5%) 5%	
- Activity	Address * Subject	Phone call 23 Roldock Road Upper Highway Gillits Durban KZN New products New products	
Activity Attendees	Attendees Send Email Invites	Judith Mudzengi John Holland Page 1 of 1 (2 Rems) [[1]] M *note that invitations can only be sent to attendees with valid email addresses	Page size: 10 💌
Schedule		22 Aug 2019 from 16:00 to 16:28 Email SMS 30 minutes before scheduled start Save	·



Adjust the Time

- *From*: Either hover over the field and click on the *directional arrows* to adjust the time or
- type in the relevant time.

CCM BPO2 Test F	Environment		Judith Mudzengi 🌣
📞 Save Act	ivity		+ 🗎
+ Case	Subject	New products	
- Case State	* Case State Percentage	Distant prospect - on hold (5%) 5%	
- Activity	Address * Subject	Phone call 23 Roldock Road Upper Highway Gillits Durban KZN New products New products	
Activity Attendees	Attendees Send Email Invites	Judith Mudzengi Judith Mudzengi John Holland Page 1 of 1 (2 items) [[1]] [m] "note that invitations can only be sent to attendees with valid email addresses	Page size: 10 🔍
Schedule		22 Aug 2019 from	
+ Quote		🗄 Save	

- **To** : Either hover over the field and click on the **up and down arrows** to adjust the time or
- type in the relevant time.



CCM BPO2 Test I	Environment	Judith Mudzengi 🌣
📞 Save Act	ivity	🔶 🖪 🗎
+ Case	Subject New products	
- Case State	* Case State Distant prospect - c Percentage 5%	on hold (5%)
- Activity	* Type Phone call Address 23 Roldock Road Up * Subject New products Comments New products	pper Highway Gillits Durban KZN
Activity Attendees	Attendees O L Judith Mudzengi L John Holland Page 1 of 1 (2 Rems) @ Send Email Invites *note that invit	
Schedule		m 15:00 to 16:28 30 minutes before scheduled start
+ Quote		
		🖹 Save

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

CTM BPO2 Test	Environment	Judith Mudzengi 🌣
📞 Save Act	tivity	🔶 🖪 🚍
+ Case	Subject New products	Ī
- Case State	Case State	2
- Activity	* Type Phone call Address 23 Roldock Road Upper Highway Gillits Durban KZN * Subject New products Comments New products	
Activity Attendees	Attendees 🚱 £ Judith Mudzengi £ John Holland Page 1 of 1 (2 Rems) ([1]) int Send Email Invites I *note that invitations can only be sent to attendees with valid email addresses	Page size: 10 v
Schedule	Date 22 Aug 2019 from 15:00 to 15:30 Reminder Email ፼ SMS □ 30 minutes before scheduled start	
+ Quote	● → Bave	

- The *Activities for []* screen will be displayed.
- The rescheduled activity will be displayed in this screen.



CM BPO2 Test Environment	Judi	th Mudzengi 🍄
Activities for Build Construction		🗲 🖪 🗘
Schedule Date		Status
CALL - New products When: 22 Aug 2019, 15:00-15:30 Who: John Holland, Build Construction Tel: 031 456 789 Email:	Cell: Bus: 031 456 789	
CALL - New products When: 19 Aug 2019, 15:48-15:48 Who: John Holland, Build Construction Tel: 031 456 789 Email: Page 1 of 1 (2 Items) C (1) () () ()	Cell: Bus: 031 456 789	Page size: 10 💌

NEXT ACTION

This allows you to close a current activity and create a new activity.

• Click on the Next Action icon.

CCM BPO2 Test Environment	Judith I	Mudzengi 🍄 🔶
🛗 My Activities		€ Ø
Schedule Date	5	Status
Meeting - Hope Works: Meeting		
When: 22 Aug 2019, 16:00-17:00 Who: John Smith, Hope Works Tel: 031 123 4567 Email: john⊜email.coza	Cell: Bus: 031 123 4567	
Phone call - Build Construction: Market new products When: 22 Aug 2019, 15:00-15:30 Who: Clere Zodaw, Build Construction Tel: 033 455 798 Email: dcere@noemail.com	Cell: 060 251 451 Bus: 031 456 789	⊘⊡ ⊚✓
Site inspection - Hope Works: contract signing		
When: 19 Aug 2019, 11:00-12:00 Wib: John Smith, Hope Works Tel: 031 123 4567 Email: john@email.coza	Cell: Bus: 031 123 4567	_
Meeting - 24 Hour HCCP: First Meeting When: 7 Aug 2019, 16:00-17:00 Who: Tandi De Jager, 24 Hour HCCP Tel: 03: 448 4476	Cell: 083 448 4476	
Email: Tandi@customer10337.com Page 1 of 1 (4 items) @ (11) > 0 mil	Bus: 031 448 4476	Page size: 10 🔍
		*

- The *Next Activity* screen will be displayed.
 - Click on the ' + ' sign to view more details or click on the ' ' sign to view less details.
 - 2. The current case / activity details will auto populate but you can edit the details if you wish to.



3. Type in the relevant *completion notes* of the current activity.

CRM BPO2 Test	Environment Judith Mudzeng	ji 🎝
→ Next Ac	tivity 🔶	B
+ Case - Case State	Subject New cement products	
- Case State	* Case State Cold Call (10%) Percentage 10%	
- Completed Activity	Summary Clere Zodwa - Build Construction Market new products 2019/09/22 3:00 DPH-3:30 PM Thotes Completion index about a Civity 	
- New Activity	* Type Address 3 Colinton Road Gillts Upper Highway KZN * Subject The subject of the activity Comments Information relating to the activity 2	
Activity Attendees	Attendees Attendees Judith Mudzengi Clere Zodwa Page 1 of 1 (Z temp) Send Email Invites ***********************************	10 💟
Schedule	Date 27 Aug 2019 from 16:00 to 17:00	
Reminder	Reminder Email 🗌 SMS 🗍 30 minutes before scheduled start	
	Save	

- 1. Update the new activity information.
- 2. Click on either the *Save* button or
- 3. *Save* icon.

CCM BPO2 Test E	Environment		Judith Mudzengi 🍄
Next Act	ivity		🗲 🛱
+ Case	Subject	New cement products	
- Case State	* Case State Percentage	Cold Call (10%) 10%	9
- Completed Activity		Clere Zodwa - Build Construction Market new products 2019/08/22 3:00 PM-3:30 PM Meeting was successful. Next activity - site visit	
- New Activity	* Subject	Site Inspection Site Inspection Site Inspection	Address 3 Colinton Road Gillits Upper Highway KZN
Activity Attendees	Attendees	Attendees Judith Mudzengi Clere Zodwa Page I of 1 (Rems) E [1]] # *note that invitations can only be sent to attendees with valid email add	
Schedule		30 Aug 2019 from 09:00 to 10:00	1 65565
Reminder		Email 🖉 SMS 🗌 30 minutes before scheduled start	
		2 🕒 🗄 Save	



- The *My Activities* screen will be displayed.
- The completed activity will be removed from this screen.
- The new activity will be displayed in this screen.

CM BPO2 Test Environment	Judit	h Mudzengi	\\$
🛗 My Activities		÷	Q
Schedule Date		Status	w.
Site inspection - Build Construction: Site Inspection When: 30 Aug 2019, 09:00-10:00 Who: Clere Zodaw, Build Construction Tel: 031 456 798 Email: dere@noemail.com	Cell: 060 251 451 Bus: 031 456 789		
Wheeting - Hope Works: Meeting When: 22 Aug 2019, 16:00-17:00 Who: John Smith, Hope Works Tel: 031 123 4567 Email: John@email.coza	Cell: Bus: 031 123 4567		
Site inspection - Hope Works: contract signing When: 19 Aug 2019, 11:00-12:00 Who: John Smith, Hope Works Tel: 031 123 4567 Email: John@email.coza	Cell: Bus: 031 123 4567		
Meeting - 24 Hour HCCP: First Meeting When: 7 Aug 2019, 16:00-17:00 Who: Tanda De Jages, 24 Hour HCCP Tel: 031.448 4476 Email: TandigCustomer10337.com	Cell: 083 448 4476 Bus: 031 448 4476		
Page 1 of 1 (4 fterns) @ < [1] > (b) #		Page size: 10	✓

VIEW CUSTOMER

• Click on the *View Customer* icon.

CM BPO2 Test Environment Judith		th Mudzengi 🌣 🔶
🛗 My Activities		← Ø
	Schedule Date	Status
Site inspection - Build Construction: Site Inspection	n	
When: 30 Aug 2019, 09:00-10:00 Who: Clere Zodwa, Build Construction Tel: 031 455 798 Email: clere@noemail.com	Cell: 060 251 451 Bus: 031 456 789	
Meeting - Hope Works: Meeting When: 22 Aug 2019, 16:00-17:00 Who: John Smith, Hope Works Tel: 031 123 4567 Email: John@email.coza	Cell: Bus: 031 123 4567	⊘∷ ©✓ →∭₊
Site inspection - Hope Works: contract signing When: 19 Aug 2019, 11:00-12:00 Who: John Smith, Hope Works Tel: 031 123 4567 Email: John@email.coza	Cell: Bus: 031 123 4567	
Meeting - 24 Hour HCCP: First Meeting When: 7 Aug 2019, 16:00-17:00 Who: Tandl De Jager, 24 Hour HCCP Tel: 031 448 4476 Email: Tandi@customer10337.com	Cell: 083 448 4476 Bus: 031 448 4476	
Page 1 of 1 (4 items) 《 < [1] > >> All		Page size: 10 🔽 🗸

- The *Customer Dashboard* will be displayed.
- You can now view the selected customer's details.



CM BPO2 Test Environment Judith Mudzengi 🍄						
💾 Cust	omer Dash	board			🕒 Search	Q
Construction Description Custor Description Custor		or Last 30 D Existing Custmrs Ing to display	New Custmrs	Performance	Pipeline Fetching data	
creste cold call	recommendations	A warnings	Hope Works - HOP00	Trading Name Hope Works Registered Name Hope Works Description VAT No	71	5%
customers	cases	activities	Crussel: 2010/01/18 10 20 45 AM	Rank Silver Webste Men:// Phone 031 123 4567		
Quotes	orders	Invoices		12 Months Sales History		
redit notes	equipment	eontracts		83 83 81 81		
Service calls	K 3rd party			55 → → → → → → → → → → → → → → → → → → →	and and a set	
. bo				@2019 CD3 Technologies (Pty) Ltd (3.5.5.1 / 3.5.5.1)		 .

OTHER ACTION ITEMS

You can also

• View Case Info and History

CM BPO2 Test Environment		Judith Mudzengi 🌣 🔒
🛗 My Activities		€ 0
	Schedule Date	Status
Site inspection - Build Construction: Site Inspecti When: 30 Aug 2019, 09:00-10:00 Who: Clere Zodwa, Build Construction Tel: 031 455 798	on	Cell: 060 251 451
Email: clere@noemail.com		Bus: 031 456 789
When: 22 Aug 2019, 16:00-17:00 Who: John Smith, Hope Works Tel: 031 123 4567 Email: john@email.coza		Cell: Bus: 031 123 4567
Site inspection - Hope Works: contract signing When: 19 Aug 2019, 11:00-12:00		
When, 19 Aug 2017, 11:00-12:00 Who: John Smith, Hope Works Tel: 031 123 4567 Email: john@email.coza		Cell: Bus: 031 123 4567
Meeting - 24 Hour HCCP: First Meeting		
When: 7 Aug 2019, 16:00-17:00 Who: Tandi De Jager, 24 Hour HCCP Tel: 031 448 4476 Email: Tandi@customer10337.com		Cell: 083 448 4476 Bus: 031 448 4476
Page 1 of 1 (4 items) 《 < [1] > >> All		Page size: 10 v

and

• Close a Case.



CCM BPO2 Test Environment		Judith Mudzengi 🌣
🛗 My Activities		🗲 Q
	Schedule Date	Status
Site inspection - Build Construction: Site Inspection		
When: 30 Aug 2019, 09:00-10:00 Who: Clere Zodwa, Build Construction Tel: 031 456 798 Email: clere@noemail.com		Cell: 060 251 451 Bus: 031 456 789
Meeting - Hope Works: Meeting		
When: 22 Aug 2019, 16:00-17:00 Who: John Smith, Hope Works Tel: 0311234567 Email: john@email.coza		Cell: Bus: 031 123 4567
Site inspection - Hope Works: contract signing		
When: 19 Aug 2019, 11:00-12:00 Who: John Smith, Hope Works Tel: 031 123 4567 Email: john@email.coza		Cell: Bus: 031 123 4567
Meeting - 24 Hour HCCP: First Meeting		
When: 7 Aug 2019, 16:00-17:00 Who: Tandi De Jager, 24 Hour HCCP Tel: 031 448 4476 Email: Tandi@customer10337.com		Cell: 083 448 4476 Bus: 031 448 4476
Page 1 of 1 (4 items) 《 < [1] > >> All		Page size: 10 v

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