

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

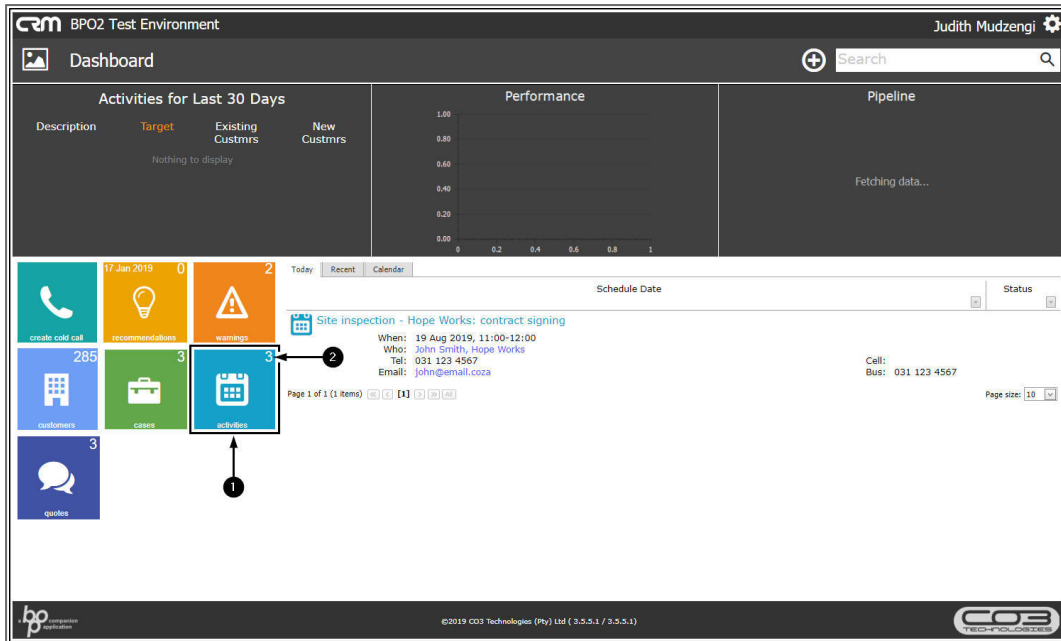
Client specific activities can be accessed from Customer Homepage.

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

Access: *Webpage* > [http://\[servername\]:\[portno\]/BPOCRM/User.aspx](http://[servername]:[portno]/BPOCRM/User.aspx)

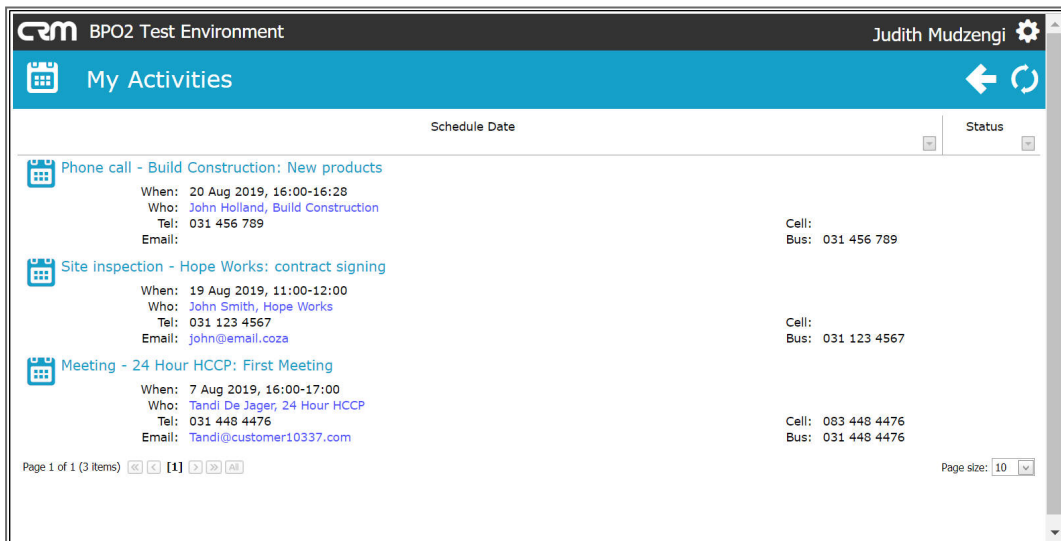
CUSTOMERS ACTIVITIES FROM THE HOMEPAGE

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.

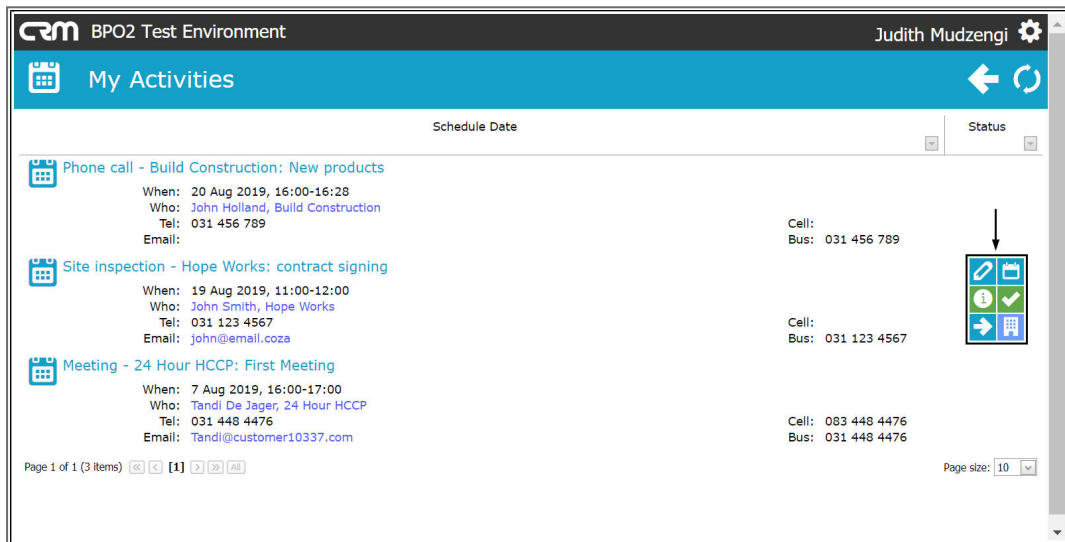


MY ACTIVITIES PAGE

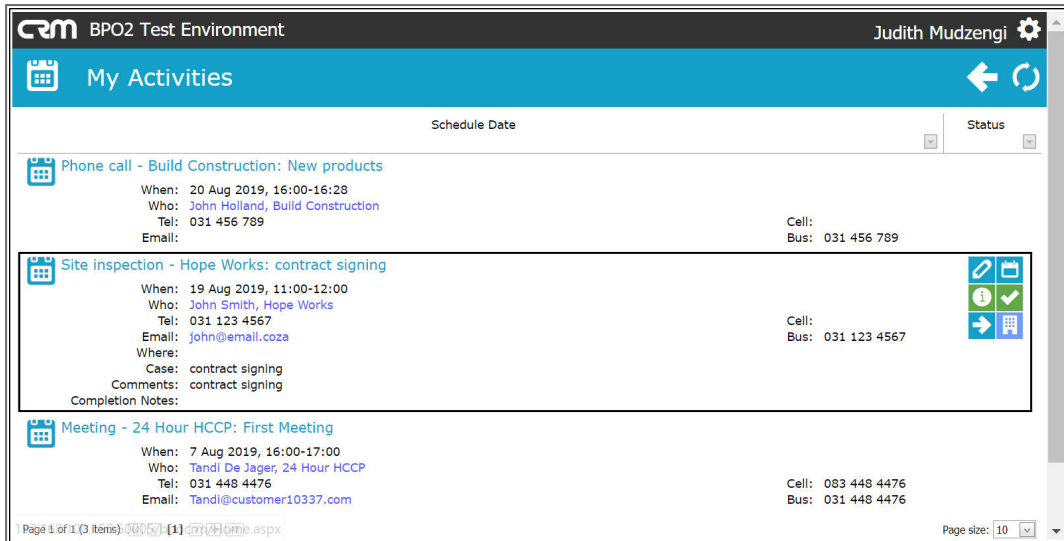
- **My Activities** page will be open.
- A list of activities will be displayed (where you have open activities).



- **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)

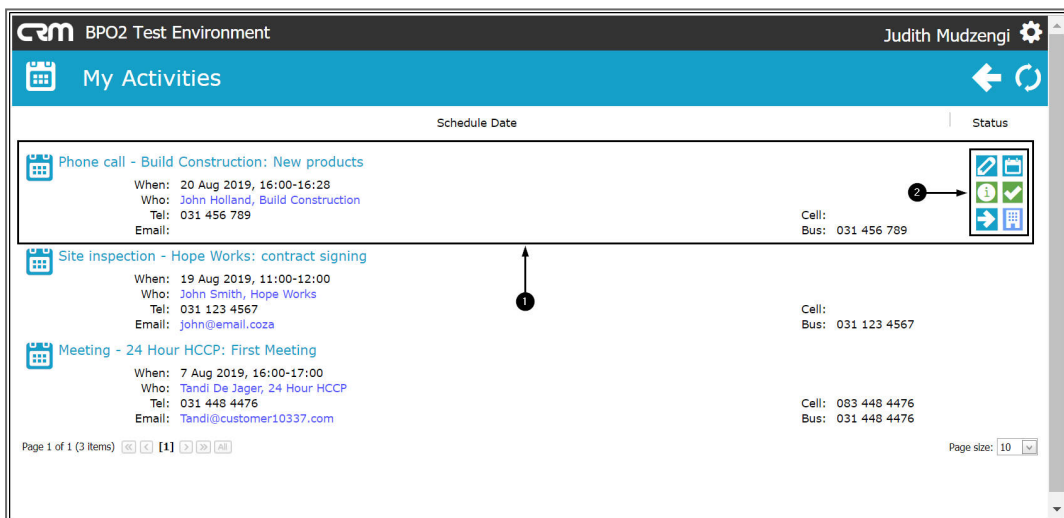


- Click on an **Activity** to access a quick view summary of the activity information.



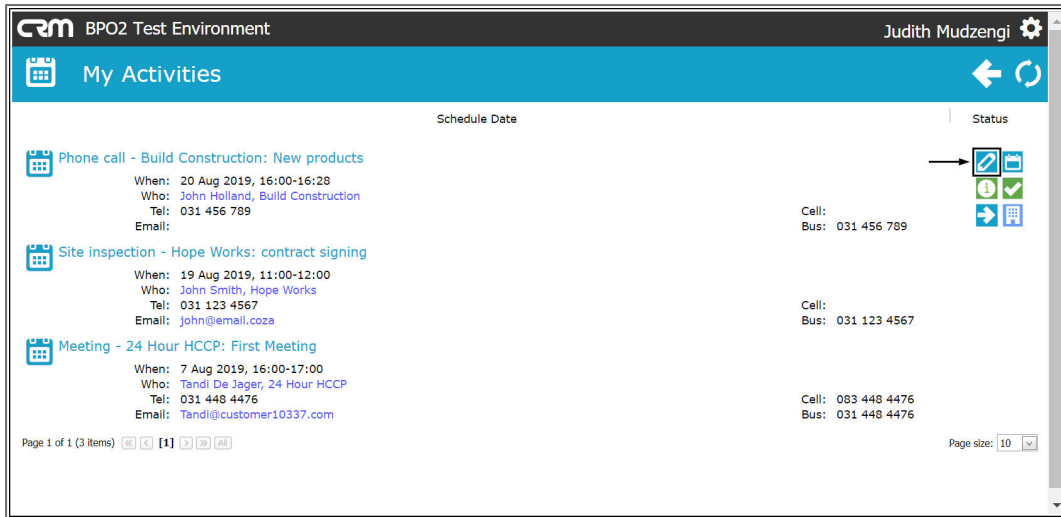
ACTION BUTTONS

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



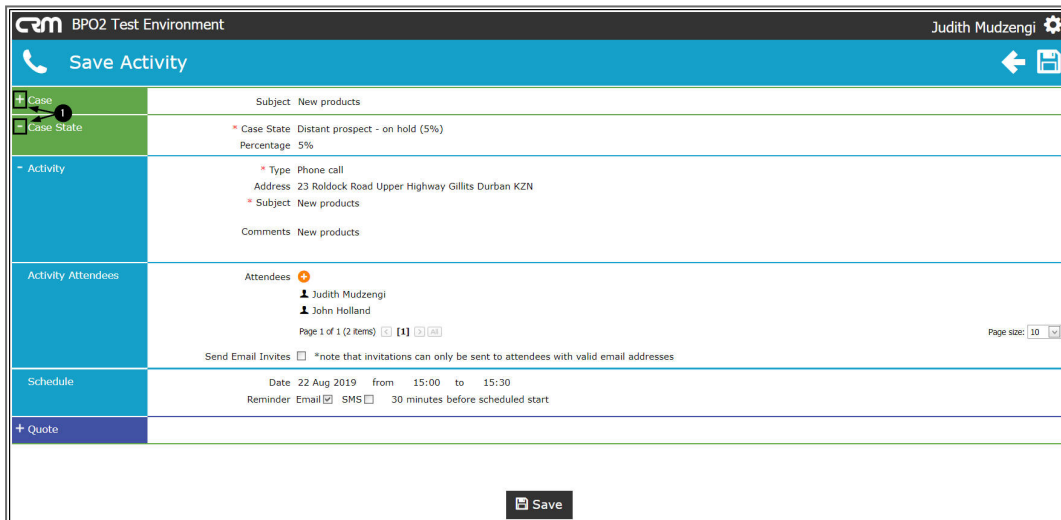
VIEW / EDIT ACTIVITY

- Click on the **View / Edit this Activity** icon.



Save Activity

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



1. CASE DETAILS

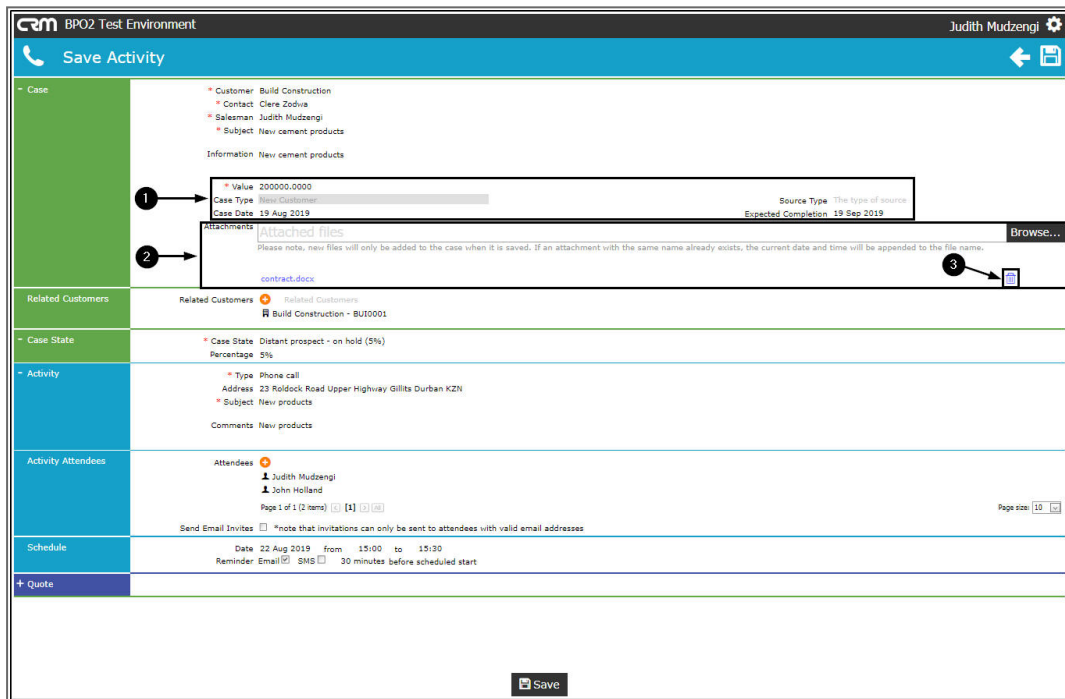
- Customer** : The customer will auto populate. This field cannot be edited.

- **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.

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 calendar 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.



- 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**.

CRM BPO2 Test Environment
192.168.100.150:60005 says
Judith Mudzengi

Save Activity
←
📄

192.168.100.150:60005 says
Are you sure you want to remove this attachment from the case?
You cannot undo this action.

Case

- * Customer: Build Construction
- * Contact: Clere Zodvia
- * Salesman: Judith Mudzengi
- * Subject: New cement products

Information: New cement products

* Value: 150000.0000

Case Type: CRMCTNEWC

Case Date: 23 Aug 2019

Source Type: Referral

Expected Completion: 30 Aug 2019

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.

contract.docx 🗑️

Related Customers

Related Customers +

- Build Construction - BU10001

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

Activity Attendees

Attendees +

- 👤 Judith Mudzengi
- 👤 Clere Zodvia
- 👤 John Holland

Page 1 of 1 (3 items) 📄

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

Schedule

Date: 22 Aug 2019 from 15:00 to 15:30

Reminder: Email SMS 30 minutes before scheduled start

+ Quote

- The attachment will be removed from the **Case** section.

CRM BPO2 Test Environment
Judith Mudzengi

Save Activity
←
📄

Case

- * Customer: Build Construction
- * Contact: Clere Zodvia
- * Salesman: Judith Mudzengi
- * Subject: New cement products

Information: New cement products

* Value: 150000.0000

Case Type: CRMCTNEWC

Case Date: 23 Aug 2019

Source Type: Referral

Expected Completion: 30 Aug 2019

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.

→ No data to display

Related Customers

Related Customers +

- Build Construction - BU10001

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

Activity Attendees

Attendees +

- 👤 Judith Mudzengi
- 👤 Clere Zodvia
- 👤 John Holland

Page 1 of 1 (3 items) 📄

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

Schedule

Date: 22 Aug 2019 from 15:00 to 15:30

Reminder: Email SMS 30 minutes before scheduled start

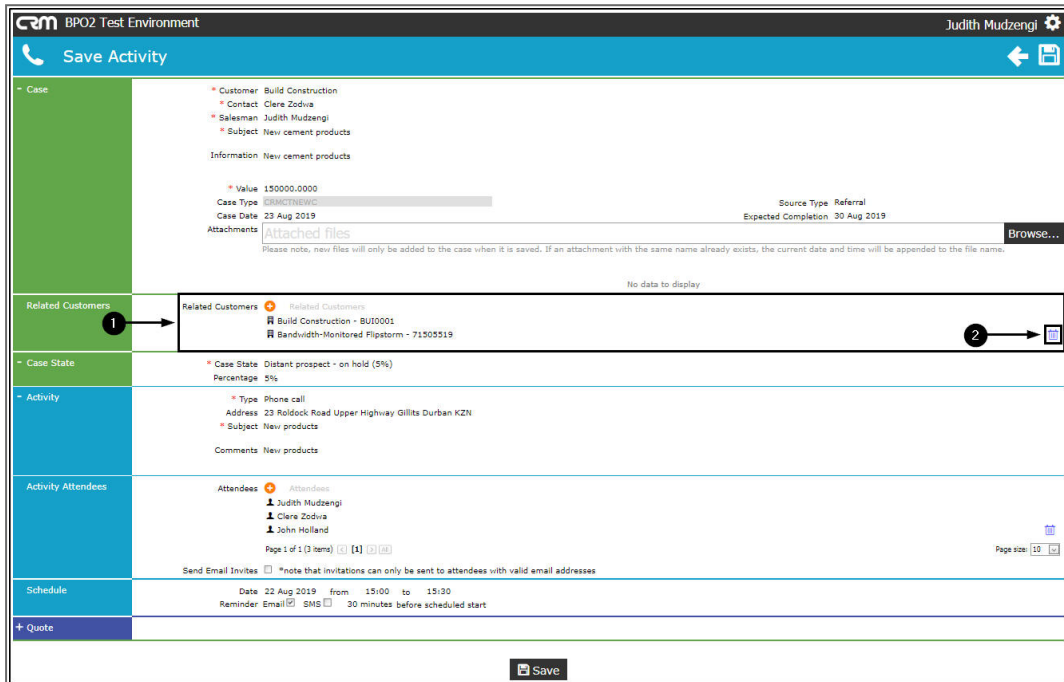
+ Quote

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.



- 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**.

CRM BPO2 Test Environment
192.168.100.150:60005 says
Judith Mudzengi

Save Activity
←
📄

Are you sure you want to remove this customer from the case?
All this customer's contacts will also be removed from activity attendees.

Case

* Contact: Clere Zodiva

* Salesman: Judith Mudzengi

* Subject: New cement products

Information: New cement products

* Value: 150000.0000

Case Type: CRMCNTNEVC

Case Date: 23 Aug 2019

Source Type: Referral

Expected Completion: 30 Aug 2019

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.

Related Customers

Related Customers: + Related Customers

Build Construction - BU10001

Bandwidth-Monitored Flipstorm - 71500519

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

Activity Attendees

Attendees: + Attendees

Judith Mudzengi

Clere Zodiva

John Holland

Page 1 of 1 (3 items) Page size: 10

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

Schedule

Date: 22 Aug 2019 from 15:00 to 15:30

Reminder: Email SMS 30 minutes before scheduled start

+ Quote

- The customer will be removed from the **Related Customers** section.

CRM BPO2 Test Environment
Judith Mudzengi

Save Activity
←
📄

Case

* Customer: Build Construction

* Contact: Clere Zodiva

* Salesman: Judith Mudzengi

* Subject: New cement products

Information: New cement products

* Value: 150000.0000

Case Type: CRMCNTNEVC

Case Date: 23 Aug 2019

Source Type: Referral

Expected Completion: 30 Aug 2019

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.

Related Customers

Related Customers: + Related Customers

Build Construction - BU10001

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

Activity Attendees

Attendees: + Attendees

Judith Mudzengi

Clere Zodiva

John Holland

Page 1 of 1 (3 items) Page size: 10

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

Schedule

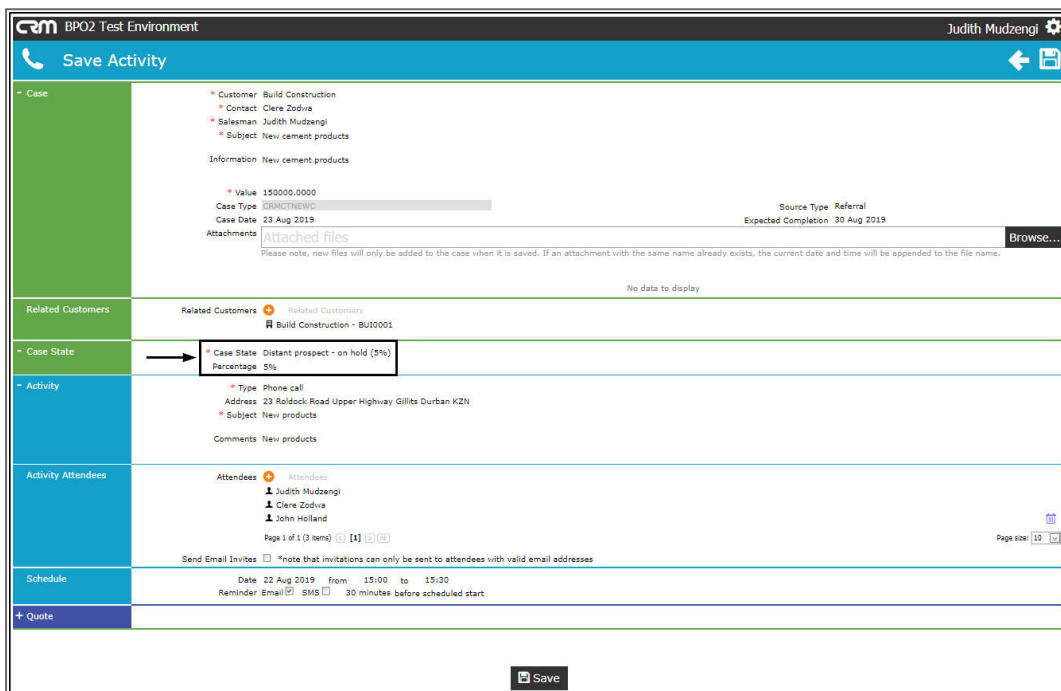
Date: 22 Aug 2019 from 15:00 to 15:30

Reminder: Email SMS 30 minutes before scheduled start

+ Quote

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.



Save Activity

Customer: Build Construction
 Contact: Clere Zodia
 Salesman: Judith Mudzengi
 Subject: New cement products
 Information: New cement products
 Value: 150000.0000
 Case Type: BUILDCON/NEWCEM
 Case Date: 23 Aug 2019
 Source Type: Referral
 Expected Completion: 30 Aug 2019

Related Customers: Build Construction - BU10001

Case State: Distant prospect - on hold (5%)
 Percentage: 5%

Activity: Type Phone call
 Address: 23 Roldoock Road Upper Highway Gillits Durban KZN
 Subject: New products
 Comments: New products

Activity Attendees: Judith Mudzengi, Clere Zodia, John Holland

Schedule: Date 22 Aug 2019 from 15:00 to 15:30
 Reminder: Email SMS 30 minutes before scheduled start

Save

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.

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.
3. **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.

Save Activity

Case

- Customer: Build Construction
- Contact: Clare Zodwa
- Salesman: Judith Mudzengi
- Subject: New cement products

Information: New cement products

Value: 150000.0000

Case Type: Source Type: Referral

Case Date: 23 Aug 2019 Expected Completion: 30 Aug 2019

Attachments:

Related Customers: Related Customers: Build Construction - BU00001

Case State: Cold Call (10%)
Percentage: 10%

Activity

- Type: Phone call
- Address: 3 Colinton Road Gillits Upper Highway KZN
- Subject: Market new products
- Comments: Market new products

Activity Attendees

Attendees

- Judith Mudzengi
- Clare Zodwa
- John Holland

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

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

Schedule

Date: 23 Aug 2019 from 15:00 to 15:30

Reminder: Email SMS 30 minutes before scheduled start

- A message box will pop up asking you;
 - ***Are you sure you want to remove this attendee from the activity?***
- Click on ***Ok***.

CRM BPO2 Test Environment
192.168.100.150:60005 says
Judith Mudzengi

Save Activity
←
📄

Are you sure you want to remove this attendee from the activity?

OK
Cancel

Case

- Customer: Build Construction
- Contact: Clere Zodvia
- Salesman: Judith Mudzengi
- Subject: New cement products

Information: New cement products

Value: 150000.0000

Case Type: CRMCTNEWSC Source Type: Referral

Case Date: 23 Aug 2019 Expected Completion: 30 Aug 2019

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.

No data to display

Related Customers

Related Customers: Build Construction - BU10001

Case State

Case State: Cold Call (10%)

Percentage: 10%

Activity

Type: Phone call

Address: 3 Colinton Road Gillits Upper Highway KZN

Subject: Market new products

Comments: Market new products

Activity Attendees

Attendees:

- Judith Mudzengi
- Clere Zodvia
- John Holland

Page 1 of 1 (3 items) Page size: 10

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

Schedule

Date: 22 Aug 2019 from 15:00 to 15:30

Reminder: Email SMS 30 minutes before scheduled start

+ Quote

Save

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

CRM BPO2 Test Environment
Judith Mudzengi

Save Activity
←
📄

Case

- Customer: Build Construction
- Contact: Clere Zodvia
- Salesman: Judith Mudzengi
- Subject: New cement products

Information: New cement products

Value: 150000.0000

Case Type: CRMCTNEWSC Source Type: Referral

Case Date: 23 Aug 2019 Expected Completion: 30 Aug 2019

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.

No data to display

Related Customers

Related Customers: Build Construction - BU10001

Case State

Case State: Cold Call (10%)

Percentage: 10%

Activity

Type: Phone call

Address: 3 Colinton Road Gillits Upper Highway KZN

Subject: Market new products

Comments: Market new products

Activity Attendees

Attendees:

- Judith Mudzengi
- Clere Zodvia

Page 1 of 1 (2 items) Page size: 10

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

Schedule

Date: 22 Aug 2019 from 15:00 to 15:30

Reminder: Email SMS 30 minutes before scheduled start

+ Quote

Save

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.

The screenshot shows the 'Save Activity' form in a CRM system. The form is divided into several sections: Case, Related Customers, Case State, Activity, Activity Attendees, Schedule, and Quote. The 'Schedule' section is highlighted with a red box and numbered 1. The 'Reminder' section has 'Email' checked and '30 minutes before scheduled start' selected, with a dropdown arrow next to it, numbered 2. The 'Date' field is set to '22 Aug 2019' and 'from 15:00 to 15:30', with a dropdown arrow next to the time field, numbered 3.

Quote Details

- You can **edit** quote details if applicable.

CRM BPO2 Test Environment
Judith Mudzengi

📞 Save Activity ← 📄

+ Case Subject: New cement products

+ Case State * Case State: Cold Call (10%)
Percentage: 10%

+ Activity * Type: Phone call
Address: 3 Colinton Road Gillits Upper Highway KZN
* Subject: Market new products
Comments: Market new products

+ Activity Attendees Attendees: Judith Mudzengi
 Clere Zodia
Page 1 of 1 (2 items)

+ Schedule Date: 22 Aug 2019 From: 15:00 to 15:00
Reminder: Email SMS 30 minutes before scheduled start

+ Quote * A quote will only be created if you add quote line items.
Quote settings: Quote Consumer defaults
* Quote Contact: Clere Zodia Date: 27 Aug 2019
Quote Reference: * Site: London
Reference: Quote * Print Layout: SALESQUOTE
Comments: Quote

+ Quote Financials * Currency: South African Rand Quote Terms: Cash on Delivery
Tax Rate: 15.000 Commercial: Default
* Exchange Rate: 10.0000

+ Add Quote Items Add Item Type to find 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	ZHS08110	ACTUATOR MFP	1	0.00	0.00	0.00	1131.78		1131.78		1301.54	
2	INVN	FS-1018MFP	FS 1018MFP	1	0.00	0.00	0.00	726.18	726.18	726.18		835.11	
									1857.96	726.18	1857.96	2136.65	

Save

Save Changes

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

CRM BPO2 Test Environment Judith Mudzengi

Save Activity

Case: Subject: New cement products

Case State: Cold Call (10%)
Percentage: 10%

Activity: Type: Phone call
Address: 3 Colinton Road Gillits Upper Highway KZN
Subject: Market new products
Comments: Market new products

Activity Attendees: Attendees: Judith Mudzengi, Clere Zodwa
Page 1 of 1 (2 items)

Schedule: Date: 22 Aug 2019 From: 15:00 to 15:00
Reminder: Email SMS 30 minutes before scheduled start

Quote: Quote settings: [Dropdown]
Quote Contact: Clere Zodwa
Quote Reference: [Dropdown]
Reference: Quote
Comments: Quote
Date: 27 Aug 2019
Site: London
Print Layout: SALESQUOTE

Quote Financials: Currency: South African Rand
Tax Rate: 15.00
Exchange Rate: 10.0000
Quote Terms: Cash on Delivery
Commercial: Default

Add Quote Items: Add Item [Icon] Type to find 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	ZHS08110	ACTUATOR MFP	1	0.00	0.00	0.00	1131.78		1131.78	[Icon]	1301.54		
2	INVN	FS-1018MFP	FS 1018MFP	1	0.00	0.00	0.00	726.18	726.18	726.18	[Icon]	835.11		
										1857.96	726.18	1857.96	2136.65	

Save

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

CRM BPO2 Test Environment Judith Mudzengi

My Activities

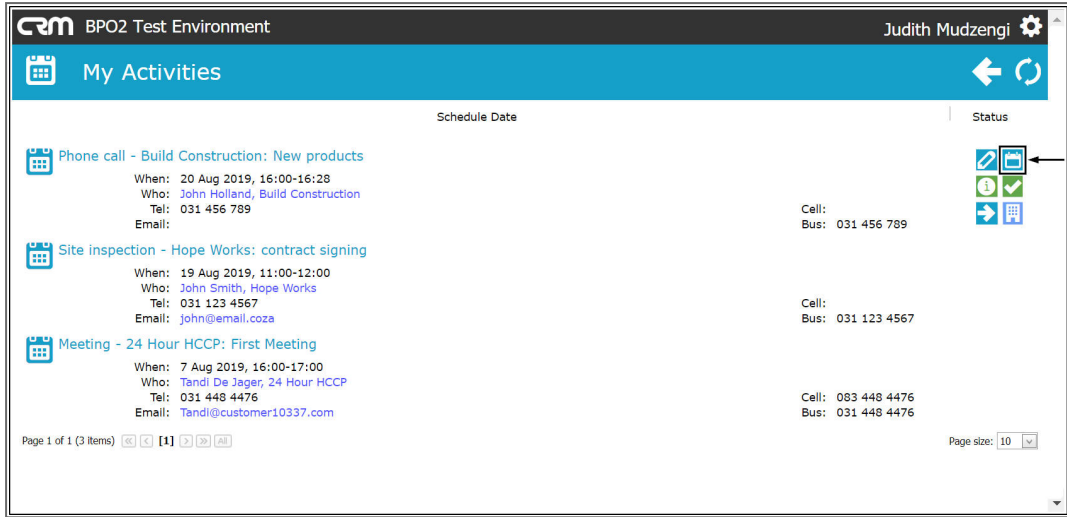
Schedule Date Status

<p>Meeting - Hope Works: Meeting</p> <p>When: 22 Aug 2019, 16:00-17:00 Who: John Smith, Hope Works Tel: 031 123 4567 Email: john@email.co.za</p>	Cell: Bus: 031 123 4567
<p>Phone call - Build Construction: Market new products</p> <p>When: 22 Aug 2019, 15:00-15:30 Who: Clere Zodwa, Build Construction Tel: 031 456 798 Email: clere@noemail.com</p>	Cell: 060 251 451 Bus: 031 456 789
<p>Site Inspection - Hope Works: contract signing</p> <p>When: 19 Aug 2019, 11:00-12:00 Who: John Smith, Hope Works Tel: 031 123 4567 Email: john@email.co.za</p>	Cell: Bus: 031 123 4567
<p>Meeting - 24 Hour HCCP: First Meeting</p> <p>When: 7 Aug 2019, 16:00-17:00 Who: Tandi De Jager, 24 Hour HCCP Tel: 031 448 4476 Email: Tandi@customer10337.com</p>	Cell: 083 448 4476 Bus: 031 448 4476

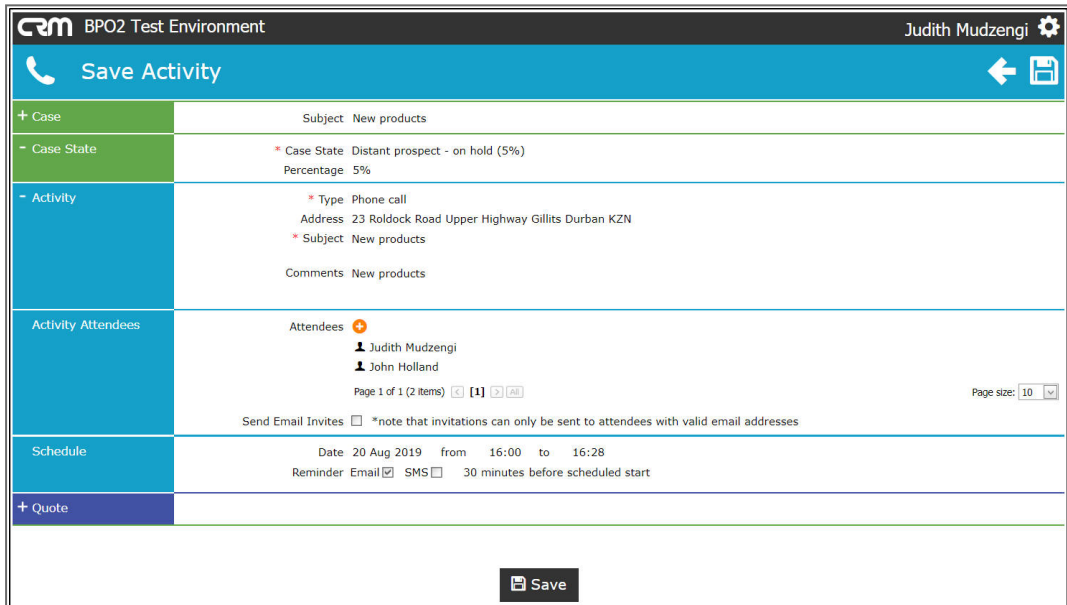
Page 1 of 1 (4 items) Page size: 10

RESCHEDULE AN ACTIVITY

- Click on the **Reschedule this Activity** icon.



- The **Save Activity** screen will be displayed.



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

crm BPO2 Test Environment
Judith Mudzengi

Save Activity

+ Case	Subject New products
- 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
Activity Attendees	Attendees <ul style="list-style-type: none"> Judith Mudzengi John Holland Page 1 of 1 (2 items) Page size: 10
Schedule	<div style="display: flex; align-items: center; gap: 10px;"> 2 → <div style="border: 1px solid black; padding: 2px;">Date: 20 Aug 2019</div> from <div style="border: 1px solid black; padding: 2px;">16:00</div> to <div style="border: 1px solid black; padding: 2px;">16:28 ← 3 </div> <div style="margin-top: 5px;"> Reminder: Email <input checked="" type="checkbox"/> SMS <input type="checkbox"/> 30 minutes before scheduled start </div> </div>
+ Quote	

Save

Adjust the Date

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

crm BPO2 Test Environment
Judith Mudzengi

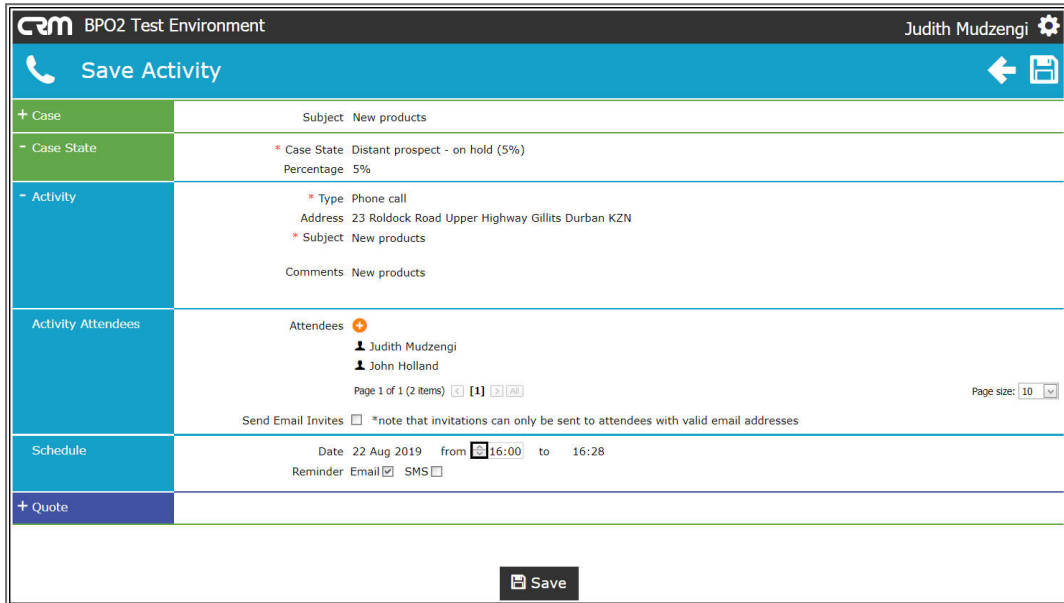
Save Activity

+ Case	Subject New products
- 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
Activity Attendees	Attendees <ul style="list-style-type: none"> Judith Mudzengi John Holland Page 1 of 1 (2 items) Page size: 10
Schedule	<div style="display: flex; align-items: center; gap: 10px;"> <div style="border: 1px solid black; padding: 2px;">Date: 20 Aug 2019</div> from <div style="border: 1px solid black; padding: 2px;">16:00</div> to <div style="border: 1px solid black; padding: 2px;">16:28</div> </div> <div style="margin-top: 5px;"> Reminder: Email <input checked="" type="checkbox"/> SMS <input type="checkbox"/> 30 minutes before scheduled start </div>
+ Quote	

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.

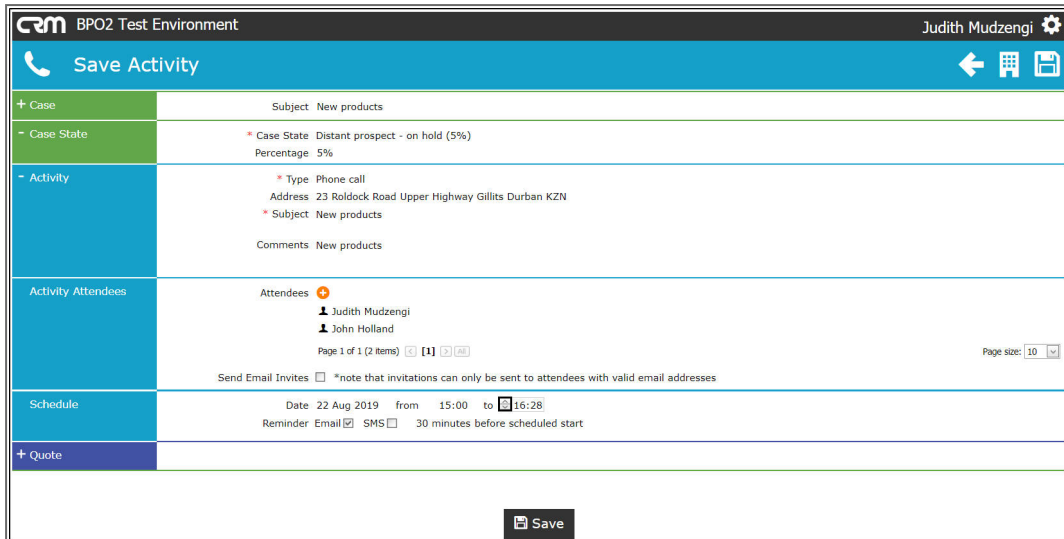


The screenshot shows a CRM interface for 'Save Activity' in a 'BPO2 Test Environment'. The user is identified as 'Judith Mudzengi'. The form is divided into several sections:

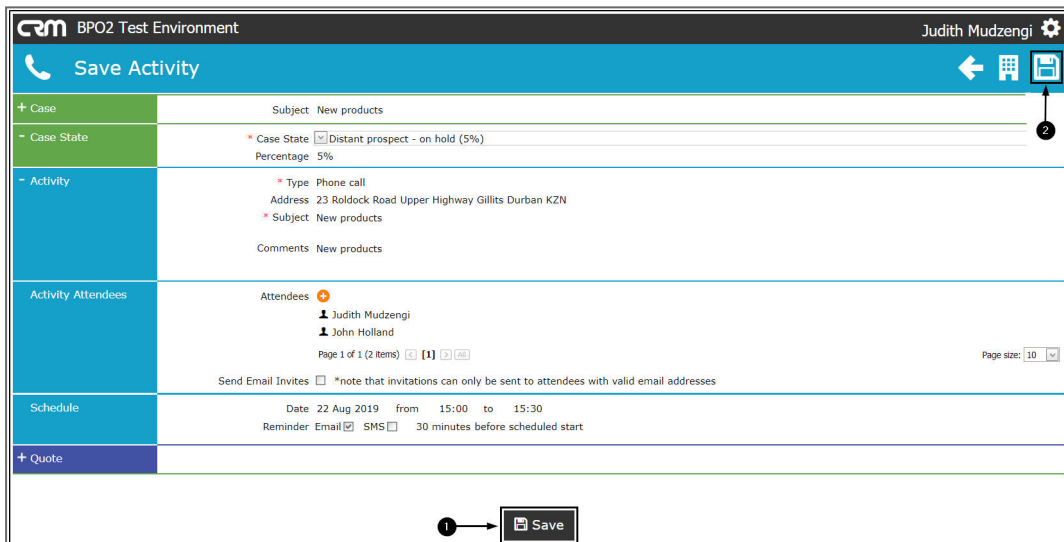
- Case:** Subject: New products
- Case State:** * Case State: Distant prospect - on hold (5%)
Percentage: 5%
- Activity:** * Type: Phone call
Address: 23 Roldock Road Upper Highway Gillits Durban KZN
* Subject: New products
Comments: New products
- Activity Attendees:** Attendees: Judith Mudzengi, John Holland
Page 1 of 1 (2 items) | Page size: 10
- Schedule:** Date: 22 Aug 2019 from 16:00 to 16:28
Reminder Email SMS
- Quote:** (empty)

A 'Save' button is located at the bottom center of the form.

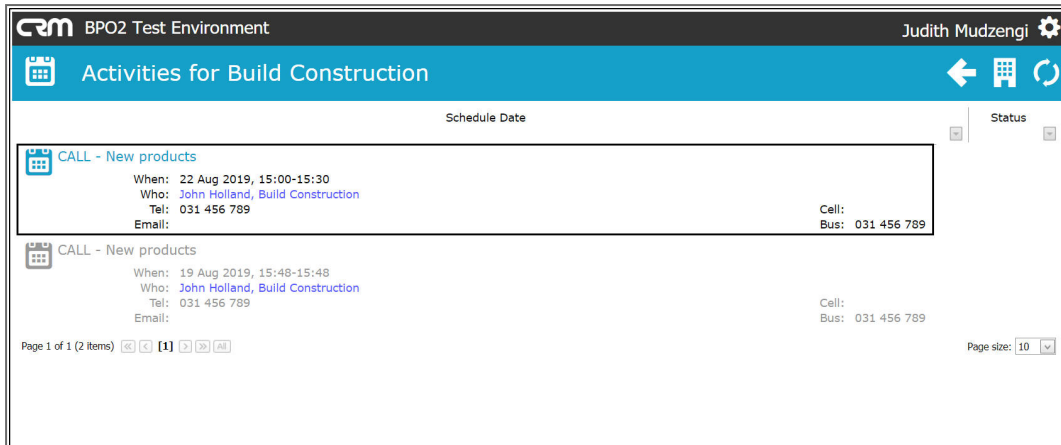
- **To :** Either hover over the field and click on the *up and down arrows* to adjust the time or
- type in the relevant time.



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



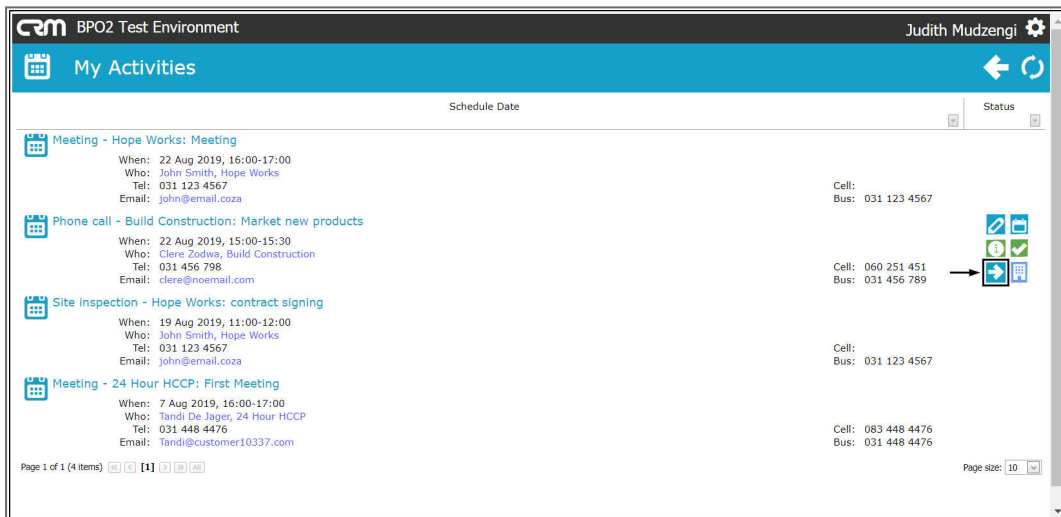
- The **Activities for []** screen will be displayed.
- The rescheduled activity will be displayed in this screen.



NEXT ACTION

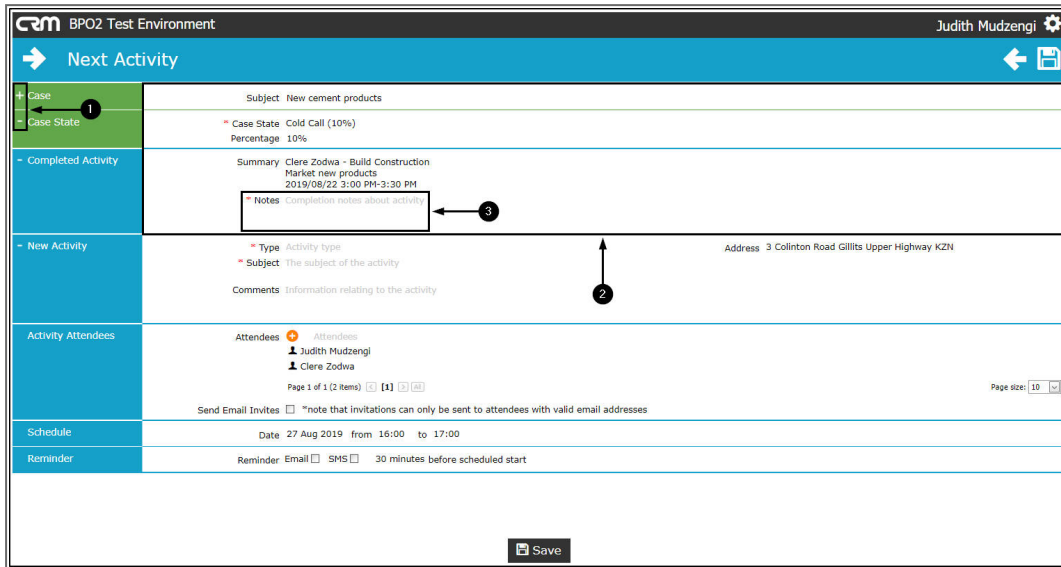
This allows you to close a current activity and create a new activity.

- Click on the **Next Action** icon.

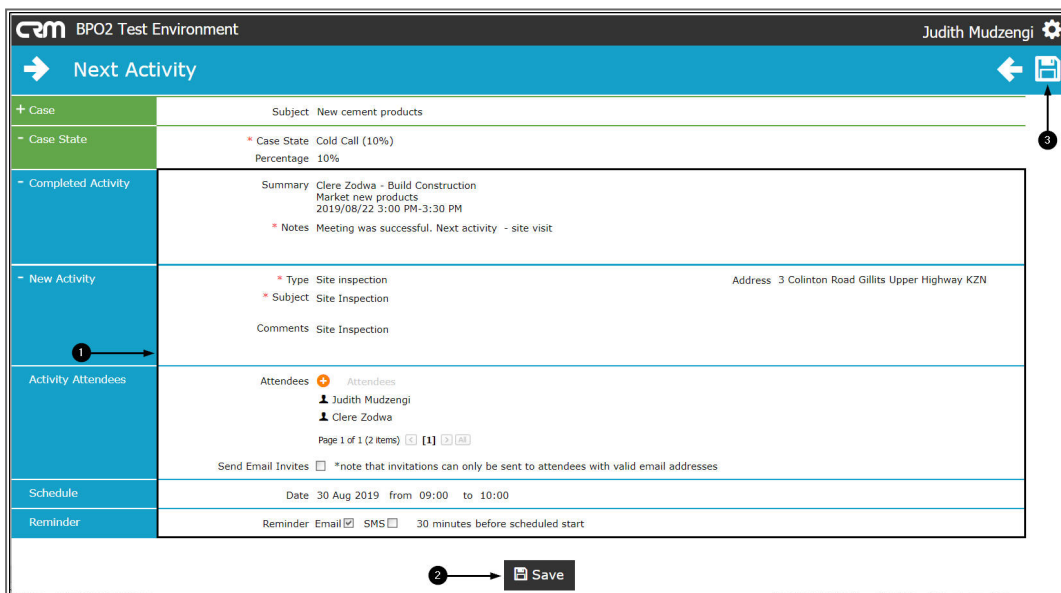


- The **Next Activity** screen will be displayed.
 1. Click on the ' + ' sign to view more details or click on the ' - ' sign to view less details.
 2. The current case / activity details will auto populate but you can edit the details if you wish to.

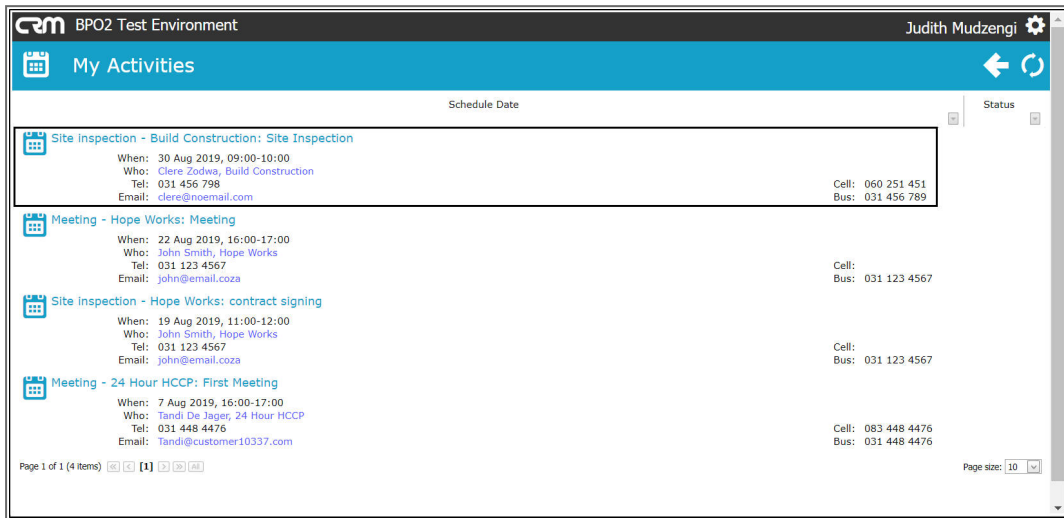
3. Type in the relevant **completion notes** of the current activity.



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

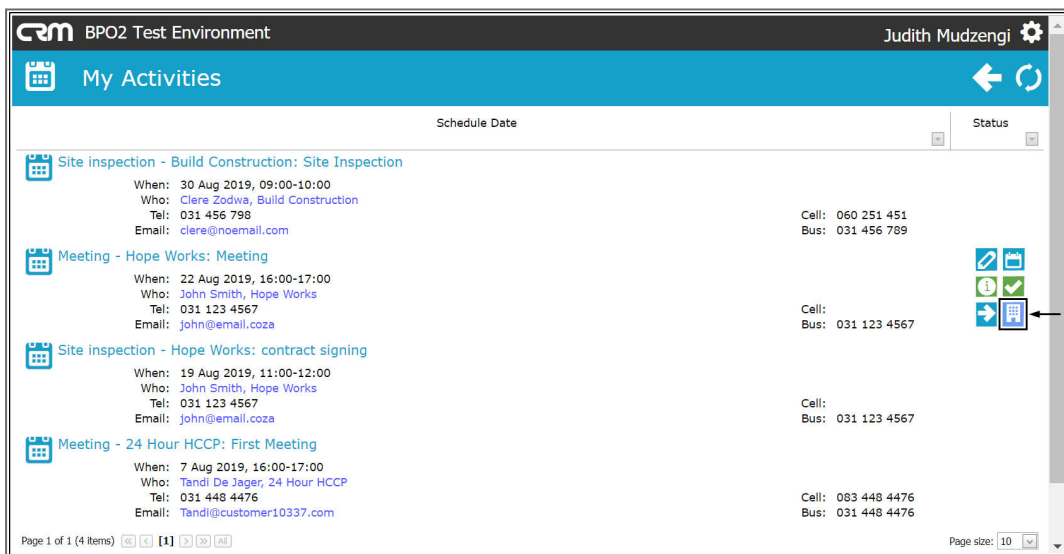


- The **My Activities** screen will be displayed.
- The completed activity will be removed from this screen.
- The new activity will be displayed in this screen.



VIEW CUSTOMER

- Click on the **View Customer** icon.



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

The screenshot shows the CRM Customer Dashboard for 'Hope Works - HOP0001'. The dashboard includes a search bar, a navigation menu with icons for 'create cold call', 'recommendations', 'warnings', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The main content area displays a 'Performance' chart, a 'Pipeline' section with 'Fetching data...', and a '12 Months Sales History' chart. The sales history chart shows 'Contract Income' and 'Sales Revenue' from August 2018 to August 2019. A sidebar on the right provides details for 'Hope Works', including Trading Name, Registered Name, Description, VAT No, Rank (Silver), Website, and Phone (031 123 4567). A 75% progress indicator is also visible.

OTHER ACTION ITEMS

You can also

- [View Case Info and History](#)

The screenshot shows the CRM 'My Activities' page. It displays a list of activities with columns for 'Schedule Date' and 'Status'. The activities listed are:

- Site inspection - Build Construction: Site Inspection**
When: 30 Aug 2019, 09:00-10:00
Who: Clere Zedwa, 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: 031 123 4567
Email: john@email.co.za
Cell: 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.co.za
Cell: 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

The page includes a 'Page 1 of 1 (4 items)' indicator and a 'Page size: 10' dropdown menu.

and

- [Close a Case.](#)

CRM BPO2 Test Environment Judith Mudzengi

My Activities

Schedule Date Status

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Page 1 of 1 (4 items) [1] Page size: 10

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