

# **SALES CONNECT**

## ADD NOTES / COMMENTS TO AN ACTIVITY

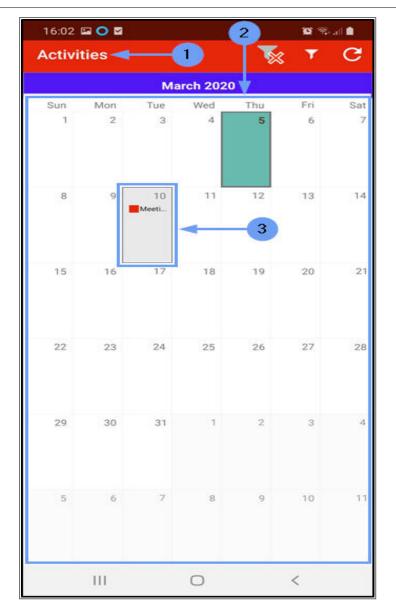
You can link notes directly to an activity in Sales Connect. These notes will pull through to CRM where they can be viewed and deleted or edited. Any changes made in CRM or in Sales Connect will reflect in the other respective application.

[Watch the video]

### **SELECT THE ACTIVITY**

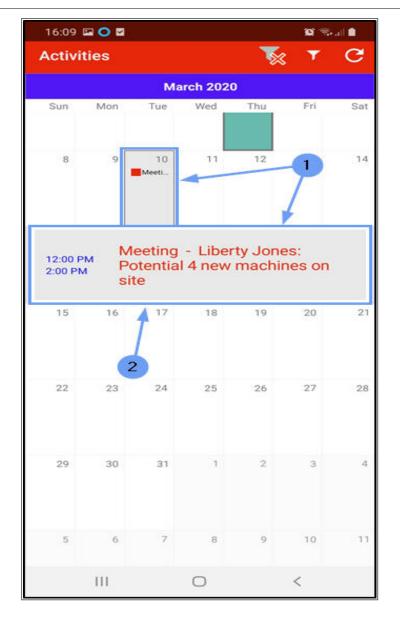
- 1. After initial login to Sales Connect the Activities screen will open.
- 2. This will display a **calendar view** of the current month.
  - i. Swipe left to view **future** months.
  - ii. Swipe right to view **previous** months.
- Tap on the date that contains the Activity that you wish to link a note to.





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

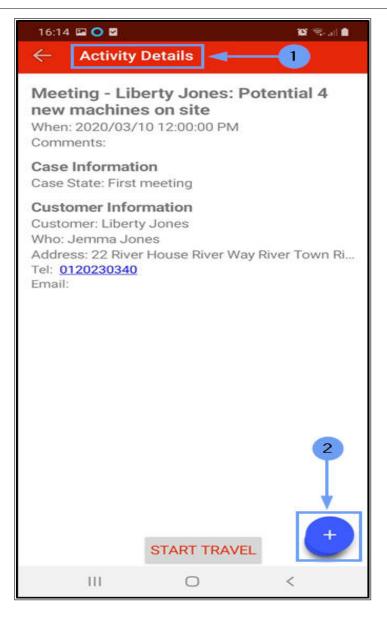




### THE ACTIVITY DETAILS SCREEN

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





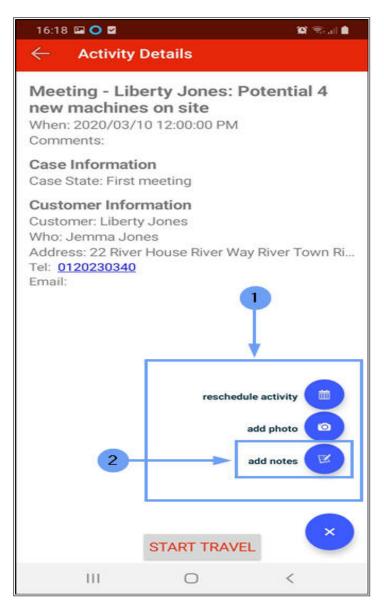
### THE ACTIVITY EDIT BUTTONS

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



#### **ADD NOTE**

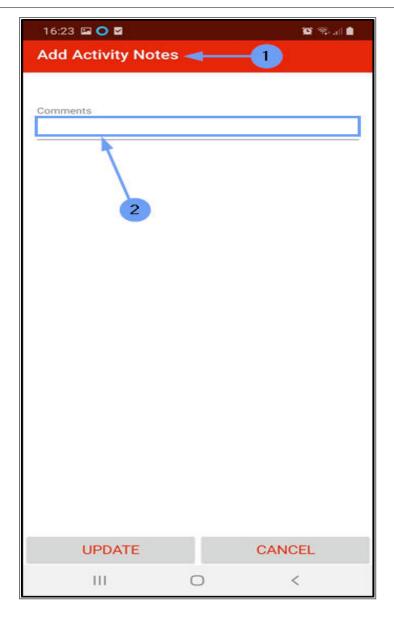
2. Tap on **add notes**.



### THE ADD ACTIVITY NOTES SCREEN

- 1. The Add Activity Notes screen will open.
- 2. Tap in the **Comments** section.





- 1. Your device's **keyboard** will display on the screen.
- 2. A **cursor** will appear in the Comments section.

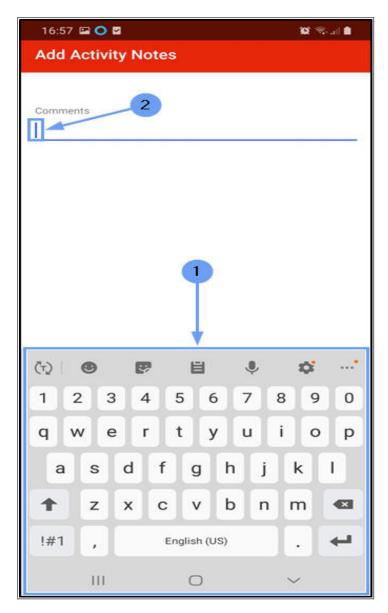
You can now start typing in your note.

### NOTES (COMMENTS) CONTENT

Notes (comments) can be:



- i. Related <u>directly</u> to the Activity:
  - e.g. "Take SP20 product brochures to the meeting"
- ii. Of a <u>more personal nature</u> to prompt you to build good relationship with your customer:
  - **e.g.** "[Customer's name] birthday this week. Be sure to acknowledge this"





#### **Note Content Alert**

- 1. Comments <u>cannot</u> contain text other than letters and numbers.
- 2. Any other text symbols and characters will cause this **Alert** error to appear on the screen when you try to **save/update** the note.
- 3. Tap on **OK** and then **delete** the unsupported characters in your Comments section.



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#### **CLOSE THE KEYPAD**

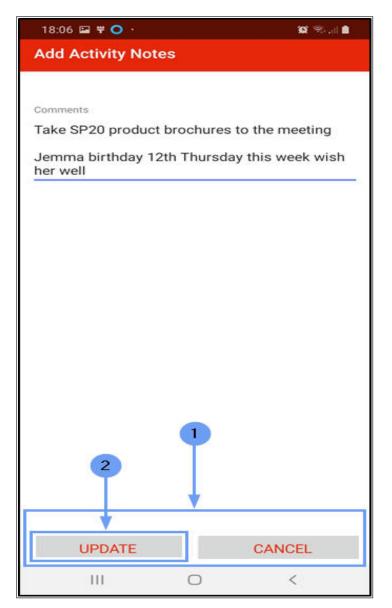
- 1. When you have finished adding the Note (Comment) (and have removed any unsupported characters),
- 2. **Close** the device keyboard.





### SAVE / UPDATE NOTES

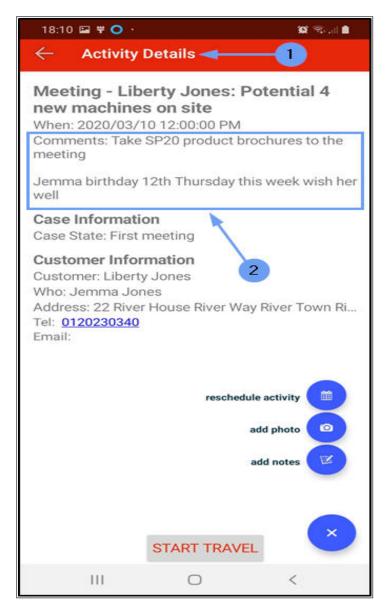
- 1. You will be able to view the **Update** and **Cancel** buttons again.
- 2. Tap on **Update**.





#### **VIEW NOTES IN THE ACTIVITY DETAILS SCREEN**

- 1. You will return to the Activity Details screen.
- 2. The added notes can now be viewed in the **Comments** section.



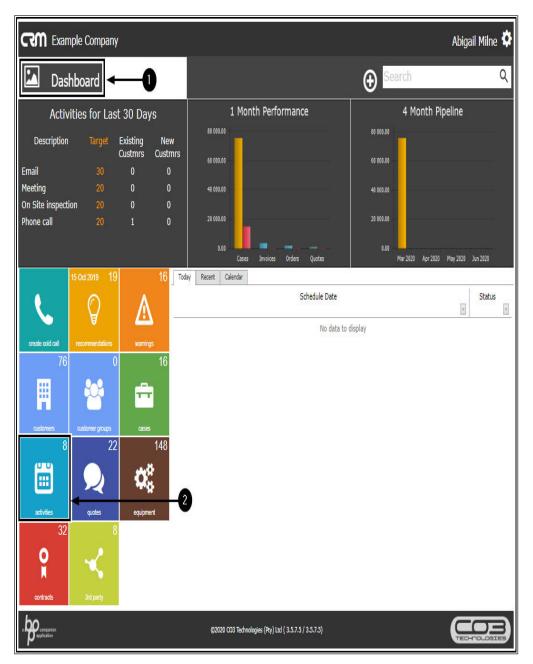
### **VIEW ACTIVITY NOTES IN CRM**

These notes will pull through to your CRM.



1. In your CRM Dashboard,

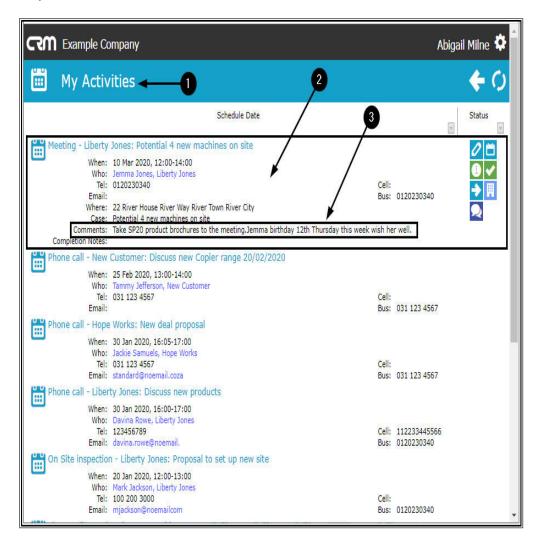
2. click on the **Activities** tile.



- 1. The My Activities page will open.
- 2. Single click anywhere on the <u>same</u>**Activity** that you added the note to.



3. The Activity frame will expand to display the **Comments** section. Here you can view the added note.



### EDIT ACTIVITY NOTES IN CRM

You can edit these Activity notes directly in **CRM** but for any changes to reflect in **Sales Connect**, you will need to go to the Activities screen in your device and tap on **Refresh**.



- 1. In the My Activities page,
- 2. Hover over the same Activity that you added the note to, until the **Action Buttons** appear.
- 3. Click on the **View/Edit this Activity** button.

CCM Example Company	Abigail Milne 🌣 🇴
🛗 My Activities 🛶 🕕 1	<b>€</b> 0
Schedule Date	Status
Meeting - Liberty Jones: Potential 4 new machines on site When: 10 Mar 2020, 12:00-14:00 Who: Jemma Jones, Liberty Jones Tel: 0120230340 Email:	3 Cell: Bus: 0120230340
Phone call - New Customer: Discuss new Copier range 20/02/2020 When: 25 Feb 2020, 13:00-14:00 Who: Tammy Jefferson, New Customer Tel: 031 123 4567 Email:	Cell: Bus: 031 123 4567
Phone call - Hope Works: New deal proposal When: 30 Jan 2020, 16:05-17:00 Who: Jackie Samuels, Hope Works Tel: 031 123 4567 Email: standard@noemail.coza	Cell: Bus: 031 123 4567
Phone call - Liberty Jones: Discuss new products When: 30 Jan 2020, 16:00-17:00 Who: Davina Rowe, Liberty Jones Tel: 123456789 Email: davina.rowe@noemail.	Cell: 112233445566 Bus: 0120230340
On Site inspection - Liberty Jones: Proposal to set up new site When: 20 Jan 2020, 12:00-13:00 Who: Mark Jackson, Liberty Jones Tel: 100 200 3000 Email: mjackson@noemailcom	Cell: Bus: 0120230340
Phone call - Apple Juice Inc: Machine x 4 When: 14 Jan 2020, 12:00-13:00 Who: Duncan McCreddie, Apple Juice Inc Tel: Email:	Cell: Bus: 013 123 4567
Meeting - ABI Goods: Customer keen to upgrade current machines When: 10 Dec 2019, 15:00-23:00 Who: David Rowe, ABI Goods	e II. (//000000

- 1. The Save Activity page will open.
- 2. Go to the **Comments** section.



3. Place your cursor next to the part of the comment that you wish to either <u>add</u> text to or <u>remove</u> text from.

CM Example Company		
🛗 Save Act	ivity 🗕 🕕	🔶 🗄
+ Case	Subject	Potential 4 new machines on site
- Case State	*Case State	First meeting (30%)
	Percentage	30%
- Activity	*Type	Meeting 3
	Address	22 River House River Way River Town River City
	*Subject	Potential 4 new machines on site
	2 Comments	Take SP20 product brochures to the meeting Jemma birthday 12th Thursday this week wish her we
Activity Attendees	Attendees	0
	Include case contact	Include the case contact as an attendee
		Abigail Milne
		L Jemma Jones
		L Davina Rowe
		Page 1 of 1 (4 items) C [1] P all Page size: 10
	Send Email Invites	□ iCal invitations are disabled because you are using Exchange syncing.
Schedule		10 Mar 2020 from 12:00 to 14:00 Email SMS

#### **SAVE CHANGES**

- 1. When you are happy with your changes (in this example, the **birth date** and **day** has been changed),
- 2. Click on Save.

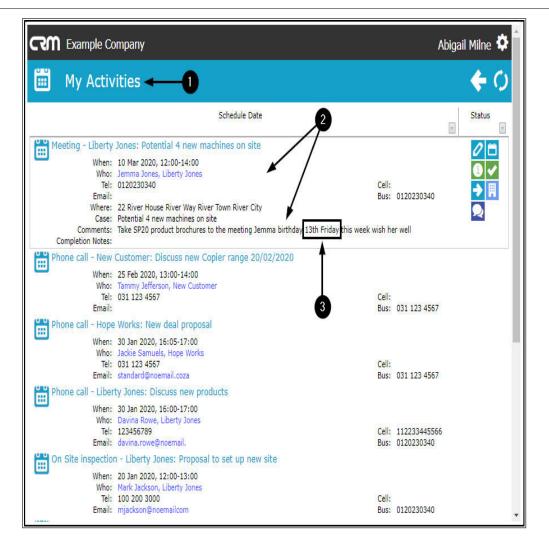


CCM Example Company			ne 🌻
🛗 Save Acti	vity	<b></b>	• 🗎
+ Case	Subject	Potential 4 new machines on site	1
- Case State	*Case State Percentage	First meeting (30%) 30%	
- Activity	Address *Subject	Meeting 22 River House River Way River Town River City Potential 4 new machines on site Take SP20 product brochures to the meeting Jemma birthday 13th Friday this week wish he	er well
Activity Attendees		Include the case contact as an attendee Abigail Milne Jemma Jones Davina Rowe Mark Jackson Page 1 of 1 (4 items) (1) A Page size I cal invitations are disabled because you are using Exchange syncing.	10 ×
Schedule		10 Mar 2020 from 12:00 to 14:00 Email SMS 60 days before scheduled start	
+ Quote			
+ Quote		■ Save	

- 1. You will return to the **My Activities** page.
- 2. Click on the Activity to expand the frame and display the **Comments** section.
- 3. You can see the contents have been updated.

**Remember**: To see these changes in Sales Connect, you will need to go to the Activities screen and tap on *Refresh*.

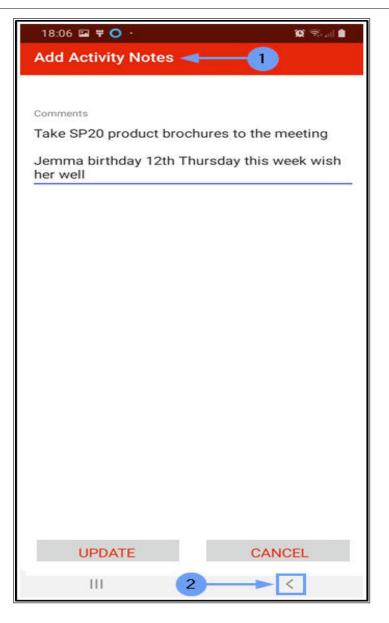




### **VIEW CHANGES IN SALES CONNECT**

- 1. If you are already in the Add Activity Notes screen,
- you will need to go Back to the Activity Details screen and then the Activities screen to be able to Refresh the app.





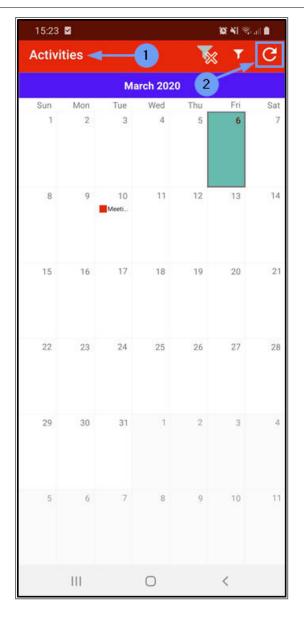
- 1. In the Activity Details screen,
- 2. tap on **Back** to return to the to the **Activities** screen.



14:39 🗹 🔰 2		io XI 🖘 "II 🛔		
	tails ┥	1		
Meeting - Libert new machines of When: 2020/03/10 Comments: Take SP meeting	20 product bro	chures to the		
Jemma birthday 12 her well	th Thursday thi	s week wish		
Case Information Case State: First me	eting			
Customer Information Customer: Liberty Jones Who: Jemma Jones Address: 22 River House River Way River Town Ri Tel: <u>0120230340</u> Email:				
	reschedule	activity		
		dd notes		
S	TART TRAVEL	×		
111	0	<		

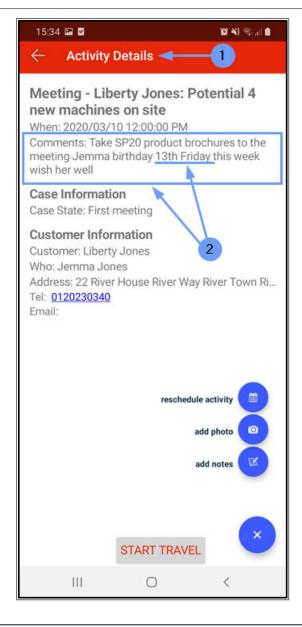
- 1. In the Activities screen,
- 2. you can now tap on Refresh .





- 1. Navigate back to Activity Details screen.
- 2. The **Comments** will have updated to match the changes made in **CRM**.





#### **Related Topics**

- <u>Sales Connect Introduction and Index</u>
- <u>Sales Connect Download and Log In / Out</u>
- <u>Sales Connect Environment</u>
- <u>Sales Connect Edit Activity Details</u>
- <u>Sales Connect Add Image / Photo to an Activity</u>
- Sales Connect Link Start and End Travel to an Activity
- <u>CRM</u>



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