

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

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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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 Who: 19 Aug 2019, 11:00-12:00 Who: 13 Abs7 Tel: 031 123 4567 Email: john@email.coza 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) @ ([1] > p @ 		Cell: Bus: 031 456 789 Cell: Bus: 031 123 4567 Cell: 083 448 4476 Bus: 031 448 4476 Bus: 031 448 4476

• 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
When: Who:	Construction: New products 20 Aug 2019, 16:00-16:28 John Holland, Build Construction 031 456 789	Cell: Bus: 031 456 ;	700
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.

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: 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: Tandl De Jager, 24 Hour HCCP Tel: 031 448 4476 Email: Tandl@customer10337.com Page 1 of 1 (3 Rems) @ < [1] > > @ @	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	CM BPO2 Test Environment 3			
📞 Save Ac	tivity	🔶 🗎		
+ 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	Attendes O Judith Mudzengi John Holland Page 1 of 1 (2 Rems) [1] : m Send Email Invites "note that invitations can only be sent to attendees with valid email addresses	Page site: 10 🔽		
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.

CCM BPO2 Test E	Environment	Judith Mudzengi 🍄
📞 Save Act	tivity	🔶 🗃
- Case	Customer Build Construction Constat: John Holland Subtex: Itev products Information: New products Information: New products Case Type Ward Contained Case Type Ward Contained Case Type Mard Contained Case Type Ma	Source Type The type of source Expected Completion 19 Sep 2019 EffOWSC n 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	No data to display
Related Customers.	Build Costoners	
- Case State	 Case State Distant prospect - on hold (5%) Percentage 5% 	
- Activity	* Type Phone call Address 23 Roblock Read Upper Highway Gillts Durban KZN * Subject New products Comments New products	
Activity Attendees	Atlandees O 1 Judith Mudzangi 2 John Holland Rogs Lof J (Lance) C (L) S (M) Send Email Invites C * note that invitations can only be sent to attendees	Page doe 10 🕞
Schedule	Date 22 Aug 2019 from 15:00 to 15:30 Reminder Email 🗹 SMS 🗌 30 minutes before scheduled start	
+ Quote		
		🖺 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.

ເຈົ	BPO2 Test E	invironment	Judith	Mudzengi 🌣
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- Case		* Customer Bu * Contact Ck * Salesman Ju * Subject Ne		
			iew Custamer Source Type The type of source	Browse
Relati	ed Customers	2	antract.docx	▲ @
			R Build Construction - BUJ0001	
- Case	State	* Case State Di: Percentage 59	listant prospect - on hold (\$%) %	
- Activi	ty	* Type Ph Address 23 * Subject Ne Comments Ne	3 Roldock Road Upper Highway Gillits Durban KZN ev producta	
Activi	ty Attendees	1 Po	1 Judith Mudangi John Holland Age of 1 (2 temp) ((1) (1)) "Ande that invitations can only be sent to attendees with valid email addresses	Page size: 10 💌
Schee	lule	Date 22 Reminder Em	2 Aug 2019 from 15/00 to 15/30 mail® SMS 0 30 minutes before scheduled start	
+ Quote	8			
			E Save	

- 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		192.168.100.150/60005 says Are you sure you want to remove this attachment from the case? You cannot undo this action.	Judith Mudzengi 🌣 🔶 🗎
	Information New cement products * Volue 10000.0000 Cese Dats 724 02019 Attachments Attachments Attachments Reserved Files Files Contract.docs	will only be added to the case when it is saved, $\ensuremath{\mathcal{I}}$ an attachment with the same name alrea	Source Type Referral Expected Completion 30 Aug 2019 Browsex ely exists, the current date and time will be appended to the file name.
Related Customers	Related Customers 📀 Related Customs 関 Build Construction		
- Case State	* Case State Distant prospect - on Percentage 5%	hold (S%)	
- Activity	* Type Phone call Address 23 Roldock Road Uppe * Subject New products Comments New products	r Highway Gillits Durban KZN	
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Schedule	Date 22 Aug 2019 from Reminder Email ☑ SMS □ 34	15:00 to 15:30 O minutes before scheduled start	
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		🖹 Save	

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

ດາເ	BPO2 Test Envir	onment	Judith Mudzengi 🌣
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- Case		Customer Build Construction Constat Clere Zolova Subcent New cement products Subcet New cement products Information New cement products Models to Solow Sol	anded to the file name.
Relate	ed Customers	Related Customers 📀 Related Customers	
- Case	State	Case State Distant prospect - on hold (5%) Percentage 5%	
- Activi	ty	* Type Phone call Address 23 Roldock Read Upper Hiphway Gillits Durban K2N * Subject New products Commenta New products	
Activi	ty Attendees	Atlandess 😧 I. Johth Mudsengi I. Clere Zodva I. John Holland Page 1 of (3 Jame) [1] [2] Send Email Invites 🔤 "note that invitations can only be sent to attendees with valid email addresses	Page slose 10 cc
Sched	lule	Date 22 Aug 2019 from 15:00 to 15:30 Reminder Email 🗹 SMS 🗌 30 minutes before acheduled start	
+ Quote			
		🖺 Save	

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.

പപ	BPO2 Test E	invironment		Judith Mudzengi 🌣
5	Save Act	ivity		🗲 🗎
- Case		 Contact Salesman Subject Information Value Case Type Case Date Attachments 	Build Construction Cire Zolva Juddh Mudangi Nev cement products 150000.0000 CENCTINEVC 23 Aug 2019 Expected Completion 30 Aug 2019 Attached Files Filess 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 app	Browse
Related	l Customers	Related Customers	Rulated Customers Related Customers Build Construction - BU0001 Build Construction - 1230519	
- Case S	tate	* Case State Percentage	Distant prospect - on hold (\$%)	9 2
- Activity	,	Address * Subject	Phone call 23 Roldock Road Upper Highway Gillits Durban KZN New products New products	
Activity	/ Attendees		Attendens Judith Mudenpi Judith Mudenpi Johr Solina John Holland Page 1 of 1 (Jama) (1) (1) monte that invitations can only be sent to attendees with valid email addresses	Page sizer 10 💌
Schedu + Quote	le	Date Reminder	22 Aug 2019 from 15:00 to 15:30 Email⊠ 5NB □ 30 minutes before scheduled start	
+ Quote			🛱 Save	

- 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 B		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.	Judith Mudzengi 🌣 🔶 🖹
	Value 150000.0000 Case Type CRACTHEWC Case Date 22 Aug 2019 Attachments Attached files	only be added to the case when it is saved. If an attachment with the same name almad No data to display	Source Type Referral Expected Completion 30 Aug 2019 Periods, the current date and time vill be appended to the file name.
Related Customers	Related Customers 📀 Related Customer 🖩 Build Construction - S 🖷 Bandwidth-Monitored	NI0001	(m)
- Case State	* Case State Distant prospect - on ho Percentage 5%	d (5%)	
- Activity	* Type Phone call Address 23 Roldock Road Upper I * Subject New products Comments New products	lighway Gillits Durban KZN	
Activity Attendees		can only be sent to attendees with valid email addresses	Fige dae 10 🕞
Schedule	Date 22 Aug 2019 from Reminder Email SMS 30 r	15:00 to 15:30 ninutes before scheduled start	
+ Quote		🖺 Save	7

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

CRM BPG	02 Test Environment	Judith Mudzengi 🌣
📞 Sa	ve Activity	🔶 🗎
- Case	* Contact	Bulla Construction Clare Zodiva
	* Subject	Judih Mudangi New caman producta
		15000.000
	Case Type	CRMCTNEWC Source Type Referral
		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 Cust	tomers Related Customers	Related Contractory = BU0001
- Case State	* Case State Percentage	Distant prospect - on hold (3%) 5%
- Activity	Address * Subject	Phone call 29 Roldsch Kazad Upper Highway Gillitz Durban KZN New products
Activity Atter		Attendes Judit Medengi Loide Medengi Circe Zohn Loine Tohn for a
Schedule	Date	22 Aug 2019 from 15/00 to 15/30 Email: 5 State
+ Quote		
		C Save

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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.

CCM BPO2 Test Er	onment Judit	n Mudzengi 🌻
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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- Case State	R Build Construction - BUI0001 Cress State Distant prospect - on hold (2%) 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 15:00 Reminder Email® SMS 30 minutes before scheduled start	
+ Quote		
	🖹 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.

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- Case		Contact C C Contact C C Contact C C Contact C	udah Mudaengi levi cement producta levi cement producta Solosonopoo Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanako Jakonanakonanako Jakonanakonanakonakonakonakonakonakonakon	Source Type Referral Expected Completion 30 Aug 2019 It is saved. If an attachment with the same name already exists, the current date and time will be appended to the file nam	Browse
and the second second				No data to display	
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- Case Sta	te	* Case State C Percentage j			
- Activity			13 Roldock Road Upper Highway Gillits Durban KZN iew products		
Activity A	Attendees			h valid email addresses	Page size: 10 💌
Schedule			12 Aug 2019 from 15:00 to 15:30 mail		
+ Quote					
				🖻 Save	

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.



CCM BPO2 Test E	nvironment Judith Mudzengi 🌣
📞 Save Acti	ivity 🔶 🗧
- Case	Customer Build Construction Contact: Clare Zodwa Salesman Juild Mudempi Subject: New cennent products Subject: New cennent products Information: New cennent products Value: 150000.0000 Case Type: Selfernal Case Data: 20 2019 Case Data
Related Customers	No data to display Related Customers Related Customers
Related Customers	Related Customers
- Case State	* Case State Cold Call (10%) Percentage 10%
- Activity	* Tope Phone call Address 3 Collocate Road Ollits Upper Highway KZN * Subject Market new products Comments Market new products
Activity Attendees	Attandese
Schedule	Date 22 Aug 2019 from 15:00 to 15:30 Reminder Email⊠ SMS 30 minutes before scheduled start
+ Quote	
	🖺 Save

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



CCM BPO2 Test	vity ok Job Job Job Job Market of Leffort and Bathania and an and a control.
- Case	Custome Build Costruction Costant Clarp Zoola Selesman Judith Moderngi Subject New cennet products Information New cennet products Value 150000.0000 Case Type Confermation 20 Aug 2019 Expected Completion 30 Aug 2019 Attachment Mathematication 20 Aug 2019 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 🕘 Related Customers
- Case State	* Case State Cold Call (10%) Percentage 10%
- Activity	* Tippe Phone call Address 3 Colliner Road Ollits Upper Highway KZN * Subject Market new products Comments Market new products
Activity Attendees	Attendese O L Judih Mudaengi L Cire Zohva L John Holland Page 1 of (2 Hem) (; [1]) (28) Seed Email Julies — Those to attendees with valid email addresses
Schedule	Dete 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.

CCM BPO2 Test E	Environment		Judith Mudzengi 🄅
📞 Save Act	ivity		🔶 🗎
- Case	Customer Contact Salesman Subject Information Value Case Type	Build Construction Clare Zohia Judih Modengi New cemant produts 15000.0000 CMCTINEVIC 2 Jug 2019 Expected Completion 30 Aug 2019	
	Attachments	Attached files 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 appende No data to display	Browse
Related Customers	Related Customers	Related Customers Related Customers	
- Case State	* Case State Percentage	Cold Call (10%) 10%	
- Activity	Address * Subject	Phone call 2 Goldhane Racel Gillis Upper Highway KZN Markat new products Markat new products	
Activity Attendees		Attendess Juddh Mudzengi Cire Zohna Pop i d' (2 kanaj (1)) "rote that invitations can only be sent to attendees with valid email addresses	Page size: 10 💌
Schedule		22 Aug 2019 from 15:00 to 15:30 Email® SMS 30 minutes before scheduled start	
+ Quote		🖺 Save	

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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.

Ę	BPO2 Test Env	vironment	Judith Mu	udzengi 🌣
5	Save Activ	vity		+ 🗎
- Case		" Contact " Salesman " Subject Information " Value Case Type Case Date Attachments	Build Construction Clare Zolava Judth Mudesoli New cement products 150000.0000 Source Type Referral 2 Aug 2019 Expected Completion 30 Aug 2019 Attached files Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exotts, the current date and time will be appended to the file name	Browse
	d Customers	Related Customers	No data to display	
- Case S	itate	* Case State Percentage	Cold Call (10%)	
- Activity	X	Address * Subject	Phone call 3 Colinton Road Gillits Upper Highway KZN Markat new products Markat new products	
Activity	y Attendees	Attendees Send Email Invites	1 Judih Mudsengi 1 Clare Zodwa	Page size: 10 🔽
Schedu + Quote	lle	O →Date Reminder	22 Aug 2019 from 15:00 to 15:30 Email 50 BMC 50 minute before scheduled start	
			🖪 Save	

Quote Details

• You can edit quote details if applicable.



CCM BPO2 Test I	Environment												Judith Mu	dzengi 🕇
Save Act	tivity													← 🖪
- Case	Sut	oject New cen	nent products											
- Case State	* Case State Cold Call (10%) Percentage 10%													
• Activity	* Type Phone call Address ⊡P Collinten Road Gills Upper Highway K2N * Subject Hindric Hav products Comments Market new products													
Activity Attendees		L Clere Page 1 of	1 (2 items) 💰 [1] 2 M	ttendees with v	alid email addre	15565						Pa	ige size: 10
Schedule		Date 22 Aug 2	2019 from	15:00 to 15:30 minutes before schedu	6									
Quote	* A quote will only be created if you add quote line items. Quote stilling I Get consume (debug * Quote Central Cless Zodra Quote Reference Quote Comments Quote													
Quote Financials	Tax	ency South Af Rate 15.00 Rate 10.0000							erms Cash on ercial Default	Delivery				
• Add Quote Items	Add	item 🔮 🗆 Ty	pe to find items	5										
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
		INVN	2HS08110	ACTUATOR MPF	1		0.00	0.00	1131.78		1131.78	01	1301.54	
	2	INVN	FS-1018MFP	FS 1018MFP	1		0.00	0.00	726.18	726.18	726.18	01	835.11	
						0.00	0.00	0.00	1857.96	726.18	1857.96		2136.65	
					_		I							
						🖹 Save								

Save Changes

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



C CI BPOZ Test	Environment												Judith Mud	lzengi 🗳
Save Ac	tivity													← 🗄
+ Case	Su	bject New cen	ent products											- 1
- Case State		* Case State Cold Cell (10%) Percentage 10%												
- Activity	Ad "Su	* Type Phone call Address [=] 3 Colintan Road Gillits Upper Highway K2N * Subject Market new products Comments Market new products												
Activity Attendees		L Clere Page 1 of	1 (2 items) 💽 [1) > M	attendees with v	alid email addre	5595						Pa	ge size: 10 💌
Schedule		Date 22 Aug 3	019 from	15:00 to 15:3 minutes before sched	0									
- Quote	A quote will only be created if you add quote line items. Quote sattings Gre cuoteme diskts Quote Contact Clere Zodwa Quote Contact Clere Zodwa Contact Clere Zodwa Contact Clere Zodwa Forference Quote Comments Quote Comments Quote													
- Quote Financials	Тах	rency South Af Rate 15.00 Rate 10.0000	rican Rand						erms Cash on ercial Default	Delivery				
- Add Quote Items	Add	item 😋 ा	pe to find items	6.1. ²										
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
		INVN	2HS08110	ACTUATOR MPF FS 1018MFP	1		0.00	0.00	1131.78 726.18	726.18	1131.78 726.18	0 m	1301.54 835.11	
	-		10 1010000	10 LOLOHIPP		0.00	0.00	0.00	1857.96	726.18	1857.96	₩ Ш	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.



CM BPO2 Test Environment		Judith M	ludzengi 🌣 🔷
🛗 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: 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: 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 I (3 items) @ < [1] > () All			Page size: 10 💌

• The Save Activity screen will be displayed.

CCM BPO2 Test E	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 John Holland Page 1 of 1 (2 items) ([1]) A *note that invitations can only be sent to attendees with valid email addresses	Page size: 10 💌
Schedule		20 Aug 2019 from 16:00 to 16:28 Email ☑ SMS ☐ 30 minutes before scheduled start	
+ Quote			
		E 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 I	CCM BPO2 Test Environment		
📞 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		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		C Save	



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

CCM BPO2 Test	Environment		Judith Mudzengi 🌣
📞 Save Ac	ivity		÷ 🗎
+ Case	Subject New products		
- Case State	Case State Distant prospect Percentage 5%	- on hold (5%)	
- Activity	Subject New products Comments	Upper Highway Gillits Durban KZN ust 2019 : Wed Thu Fn Sat 31 1 2 3	
Activity Attendees	0 4 5 6 0 11 12 13 18 19 20 27 1 2 3 2 Send Email Invites Today	7 8 9 10 14 15 16 17 21 22 - 2	Page size: 10 🔍
Schedule	Date The date is form f		
+ Quote			
		🖹 Save	

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

CCM BPO2 Test E	Invironment	Judith Mudzengi 🌣
📞 Save Act	ivity	🗲 🗎
+ Case	Subject Ne	w products
- Case State	* Case State Dis Percentage 5%	tant prospect - on hold (5%)
- Activity	* Type Phr Address 23 * Subject Ner Comments Ner	Roldock Road Upper Highway Gillits Durban KZN v products
Activity Attendees	1 Pag	Judith Mudzengi John Holland ei 1 of 1 (2 items) < [1] > All Page size: 10 w *note that invitations can only be sent to attendees with valid email addresses
Schedule	Date 22 Reminder Em	Aug 2019 from 16:00 to 16:28 all 🛛 SMS 🗋 30 minutes before scheduled start 🗸 🗸



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 E	Environment	Judith Mudzengi 🌣
📞 Save Act	tivity	🔶 🖪 🖨
+ 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 1 John Holland Page 1 of 1 (2 kems) < [1] [2 mil] Send Email Invites 🔲 *note that invitations can only be sent to attendees with valid email addresses	Page size: 10 🕑
Schedule	Date 22 Aug 2019 from 15:00 to ☐ 16:28 Reminder Email ☑ SMS □ 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 Rems) @ < [1] > D All	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	Judit	h Mudzengi 🌣 📤
🛗 My Activities		↔ Ø
Schedule Date		Status
Meeting - Hope Works: Meeting		
When: 22 Aug 2019, 16:00-17:00 Who: John Smith, Hope Works Te: 031 123 4567 Email: john⊜ernall.coza	Cell: Bus: 031 123 4567	
Phone call - Build Construction: Market new products		
When: 22 Aug 2019, 15:00-15:30 Who: Clere Zodwa, Build Construction Te: 031 456 798 Email: clere@noemail.com	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 Te: 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	Cell: 083 448 4476	_
Email: Tandi@customer10337.com	Bus: 031 448 4476	
Page 1 of 1 (4 items) @ ([1]))		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	t Environment Judith	Mudzengi 🌣
🔶 Next Ac	tivity	🔶 🗎
+ 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 OPH-3:30 PM * Notes Completion notes about activity	
- New Activity	* Type Activity type Address 3 Colinton Road Gillits Upper Highway K2N * Subject The subject of the activity Comments: Information relating to the activity 2	
Activity Attendees	Attendees Attendees Judith Hudzengi Clere Zodwa Post 5f 1(2 Rem) (11) (Send Email Invites * note that invitations can only be sent to attendees with valid email addresses	Page size: 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	105505
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.

S	η βρο2 τε	st Environment		Judit	h Mud	lzengi	\$
	Му Ас	tivities				÷	C)
		Schedule Date			¥	Status	×
	Wh	n - Build Construction: Site Inspection en: 30 Aug 2019, 09:00-10:00 bio: Clere Zodwa, Build Construction Fel: 031, 456 798 Bi: Cere@noemail.com		060 251 451 031 456 789			
	WH	e Works: Meeting en: 22 Aug 2019, 16:00-17:00 hoi: John Smith, Hope Works Fel: 031, 123 4567 ali: john@email.coza	Cell: Bus:	031 123 4567			
Ë	WH	1 - Hope Works: contract signing en: 19 Aug 2019, 11:00-12:00 hoi: John Smith, Hope Works Fel: 031, 123 4567 ali: john@email.com	Cell: Bus:	031 123 4567			
	WH	Hour HCCP: First Meeting en: 7 Aug 2019, 16:00-17:00 ho: Tandi De Jager, 24 Hour HCCP Fiel: 031:448 4476 ail: Tandi@customer10337.com		083 448 4476 031 448 4476			
Page 1	of 1 (4 items) 📧 🤇				Page	e size: 10	~

VIEW CUSTOMER

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

CRM BPO2 Test	Environment	Judith Mu	dzengi 🍄 🗅
🛗 My Activ	ities		€ Ø
	Schedule Date		Status
Site inspection -	Build Construction: Site Inspection		
When: Who: Tel:	30 Aug 2019, 09:00-10:00 Clere Zodwa, Build Construction 031 456 788 clere@noemail.com	Cell: 060 251 451 Bus: 031 456 789	
Meeting - Hope V	/orks: Meeting		
When: Who: Tel:	22 Aug 2019, 16:00-17:00 John Smith, Hope Works 031 123 4567 John@emal.coza	Cell: Bus: 031 123 4567	0 ✓ → □ ←
Site inspection -	Hope Works: contract signing		
When: Who: Tel:	19 Aug 2019, 11:00-12:00 John Smith, Hope Works 031 123 4567 john@email.coza	Cell: Bus: 031 123 4567	
Meeting - 24 Hou	r HCCP: First Meeting		
When: Who: Tel:	7 Aug 2019, 16:00-17:00 Tandl De Jager, 24 Hour HCCP 031 448 4476 Tandi@customer10337.com	Cell: 083 448 4476 Bus: 031 448 4476	
Page 1 of 1 (4 items)		Pa	ge 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 Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor Custor 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	Created: 2010/01/18 () 22 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.

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CCM BPO2 Test Environment	Judith Mudzengi 🌣	
📰 My Activities		🔶 🗘
	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: 03 1123 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: 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 🗸

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