

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

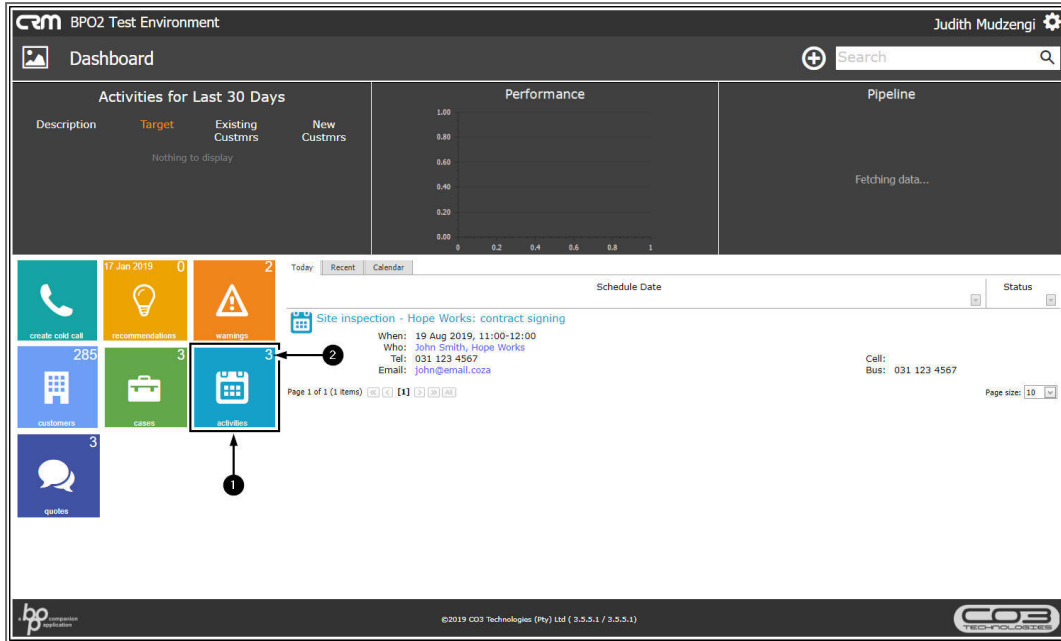
Client specific activities can be accessed from Customer Homepage.

A full list of 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)

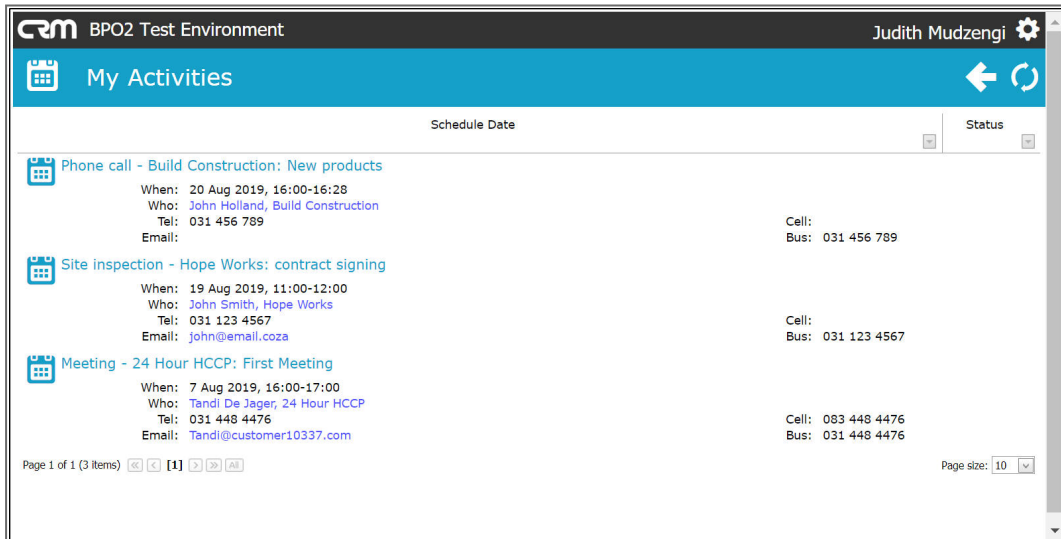
CUSTOMERS ACTIVITIES FROM THE HOMEPAGE

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.

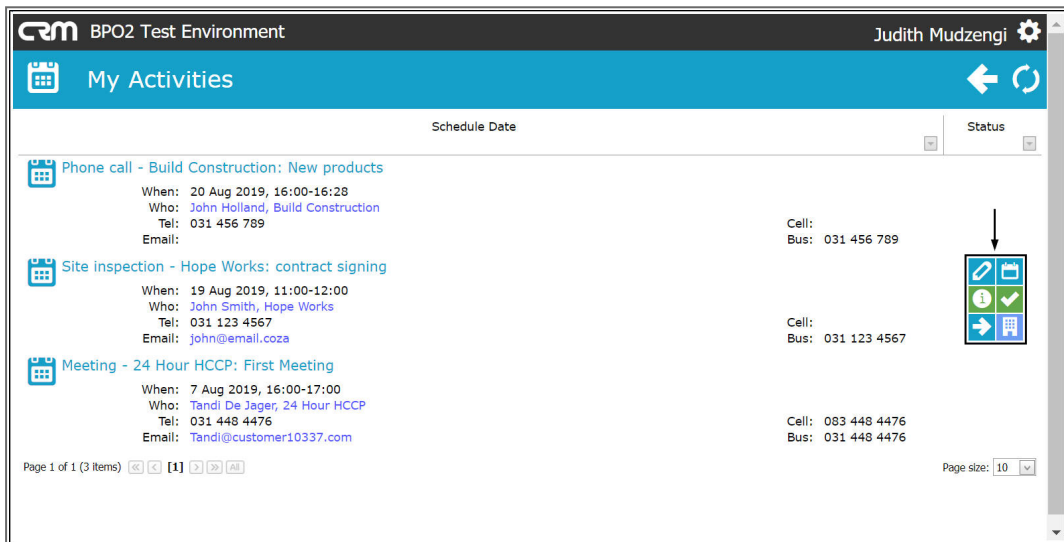


MY ACTIVITIES PAGE

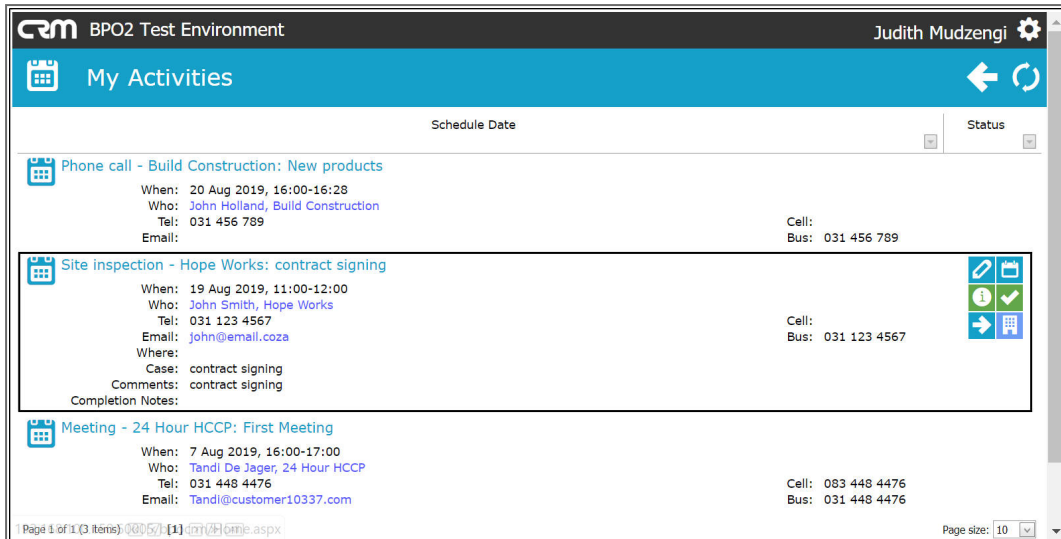
- **My Activities** page will be open.
- A list of activities will be displayed (where you have open activities).



- **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)

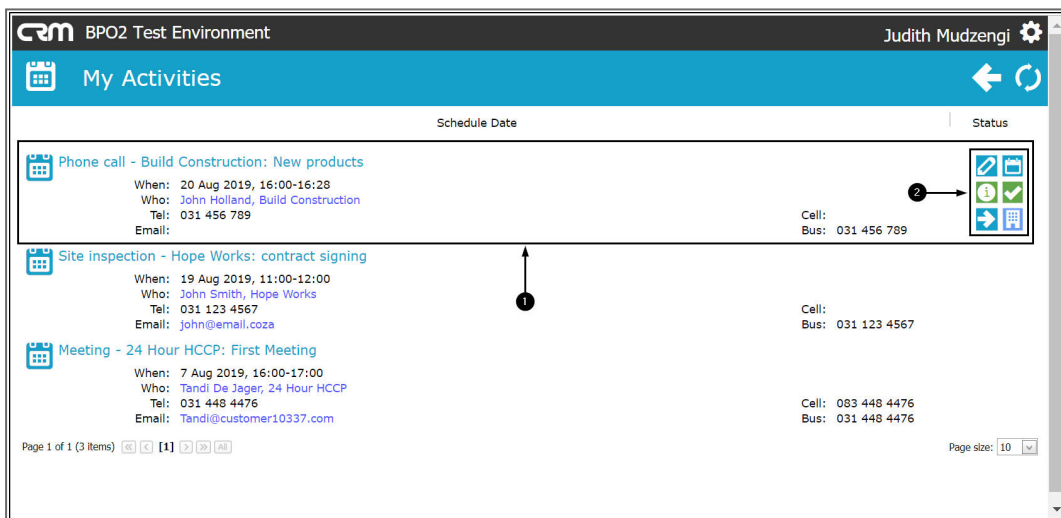


- Click on an **Activity** to access a quick view summary of the activity information.



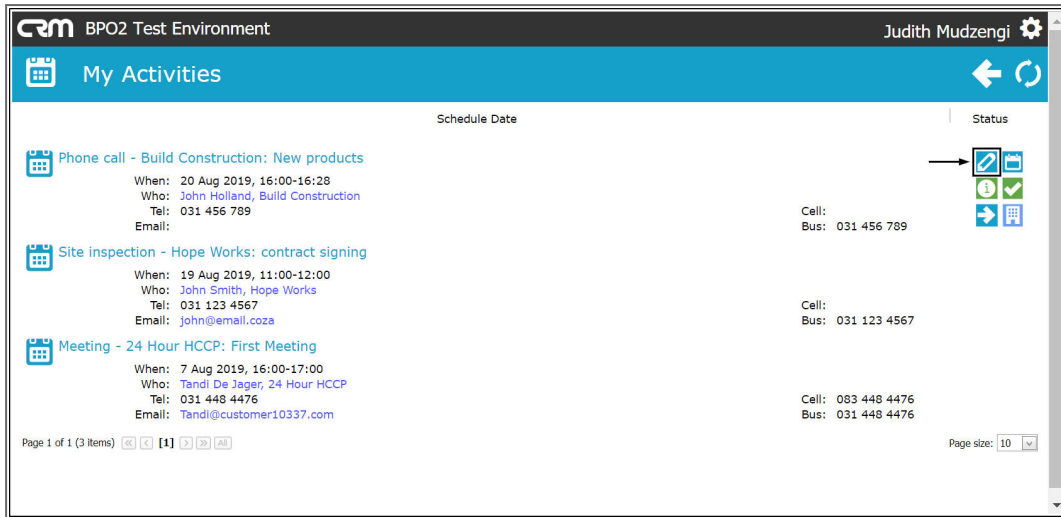
ACTION BUTTONS

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



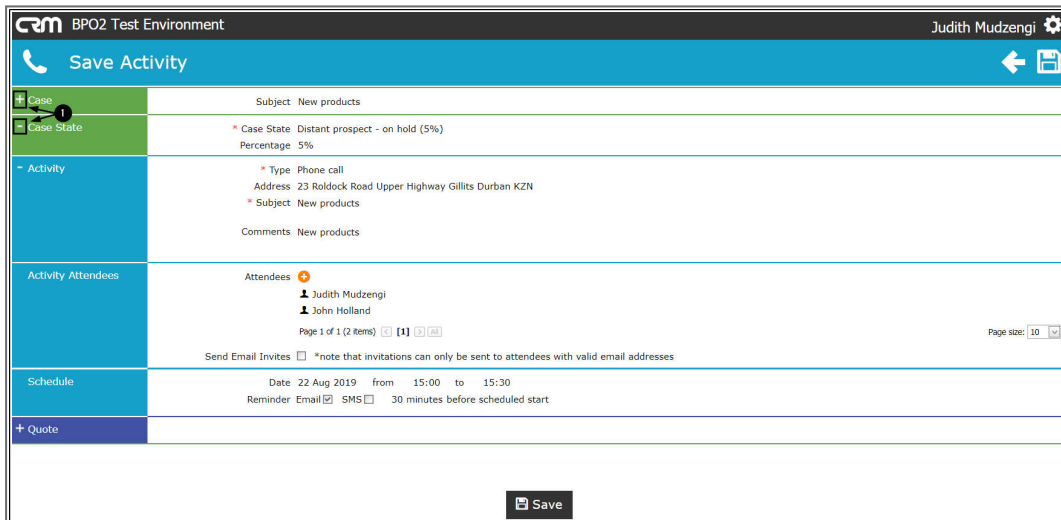
VIEW / EDIT ACTIVITY

- 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

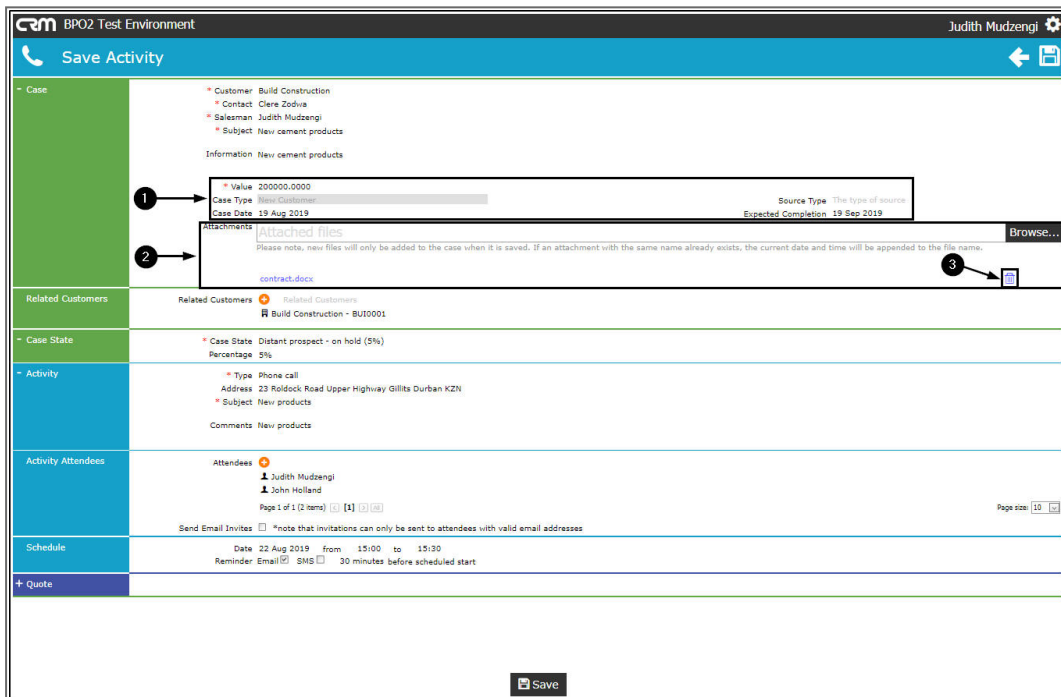
- Customer** : The customer will auto populate. This field cannot be edited.

- **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

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: CRMCCTNEWC

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) [1] [2] [3]

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: CRMCCTNEWC

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) [1] [2] [3]

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

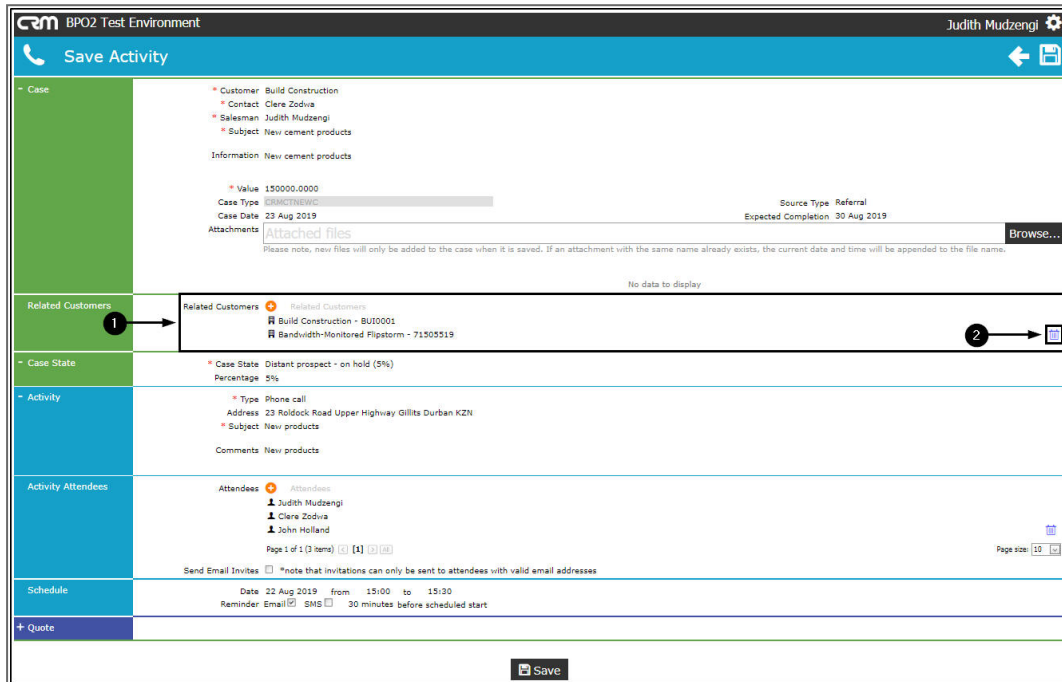
Quote

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: DRACHTNEVC
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 Build Construction - BU00001
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

- Judith Mudzengi
- Clere Zodiva
- 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: 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: DRACHTNEVC
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 Build Construction - BU00001

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 Zodiva
- 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: 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.

The screenshot shows the 'Save Activity' form in the CRM BPO2 Test Environment. The form is divided into several sections:

- Case**: Customer Build Construction, Contact Clere Zodia, Salesman Judith Mudzengi, Subject New cement products, Information New cement products, Value 150000.0000, Case Type BUI0001, Case Date 23 Aug 2019, Source Type Referral, Expected Completion 30 Aug 2019.
- Related Customers**: Build Construction - BU0001.
- 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.
- Quote**: (Empty field)

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

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.

The screenshot shows the 'Save Activity' form in the CRM BPO2 Test Environment. The form is divided into several sections:

- Case:** Customer (Build Construction), Contact (Clere Zodia), Salesman (Judith Mudzengi), Subject (New cement products), Information (New cement products), Value (150000.0000), Case Type (Sales/Referral), Case Date (23 Aug 2019), Source Type (Referral), Expected Completion (30 Aug 2019).
- Attachments:** Attached files (Browse... button).
- Related Customers:** Build Construction - BU10001.
- Case State:** Cold Call (10%), Percentage (10%).
- Activity:** Type (Phone call), Address (23 Roldock Road Upper Highway Gillits Durban KZN), Subject (New products), Comments (New products). A red box highlights this section with an arrow.
- Activity Attendees:** Judith Mudzengi, Clere Zodia, John Holland. Page 1 of 1 (3 items).
- Schedule:** Date (22 Aug 2019), from (15:00) to (15:30), Reminder (Email, SMS, 30 minutes before scheduled start).
- Quote:** (Empty field).

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

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.

CRM BPO2 Test Environment Judith Mudzengi

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: **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: Related Customers

- Build Construction - BU00001

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
- 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

Quote

- 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)

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)

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**: Includes fields for Customer (Build Construction), Contact (Clere Zodwa), Salesman (Judith Mudzengi), Subject (New cement products), Information (New cement products), Value (150000.0000), Case Type (BRMCTNEWC), Case Date (23 Aug 2019), Source Type (Referral), and Expected Completion (30 Aug 2019). There is an 'Attachments' section with a 'Browse...' button.
- Related Customers**: Shows 'Build Construction - BUJ0001'.
- Case State**: Shows 'Cold Call (10%)' and 'Percentage 10%'.
- Activity**: Includes 'Type Phone call', 'Address 3 Collinton Road Gillits Upper Highway KZN', 'Subject Market new products', and 'Comments Market new products'.
- Activity Attendees**: Lists 'Judith Mudzengi' and 'Clere Zodwa'. There are pagination controls for attendees.
- Schedule**: This section is highlighted with a blue bar. It contains:
 - 'Send Email Invites' checkbox (unchecked) and a note: '*note that invitations can only be sent to attendees with valid email addresses'.
 - 'Date' field: 22 Aug 2019, with a circled '1' pointing to it.
 - 'from' field: 15:00, with a circled '2' pointing to it.
 - 'to' field: 15:30, with a circled '3' pointing to it.
 - 'Reminder' section: 'Email' checkbox (checked), 'SMS' checkbox (unchecked), and a dropdown menu set to '30 minutes before scheduled start'.
- Quote**: A section at the bottom with a '+' icon.

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

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) [1] [2]

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 15:00
Reminder: Email SMS 30 minutes before scheduled start

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

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

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	🔗 🗑️	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
 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) [1] [2] [3]
 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 15:00
 Reminder: Email SMS 30 minutes before scheduled start

Quote
 * A quote will only be created if you add quote line items.
 Quote settings: [Customer default]
 Quote Contact: Clere Zodwa
 Quote Reference: [Reference]
 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 [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	

[1] → Save

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

CRM BPO2 Test Environment Judith Mudzengi

My Activities

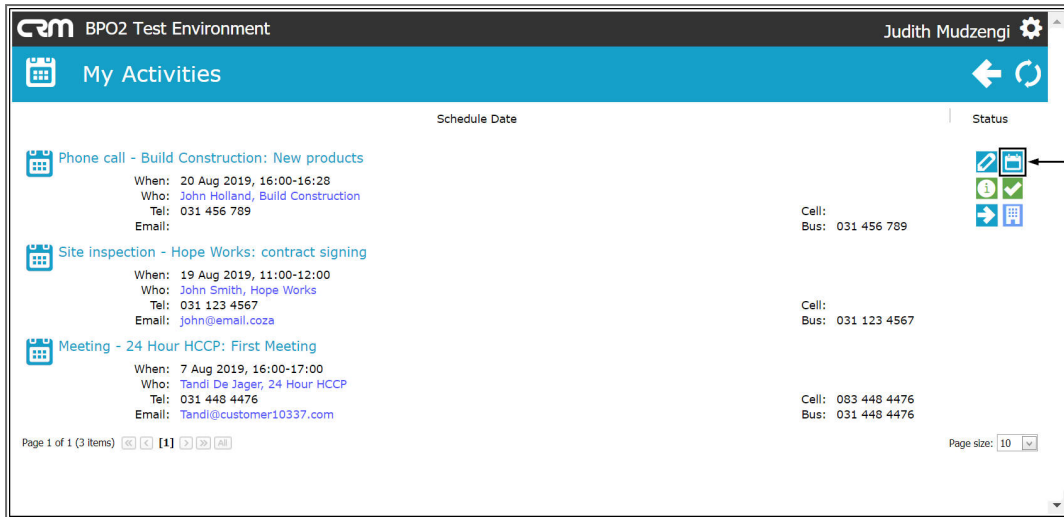
Schedule Date [Filter] Status [Filter]

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
Phone call - Build Construction: Market new products When: 22 Aug 2019, 15:00-15:30 Who: Clere Zodwa, Build Construction Tel: 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 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

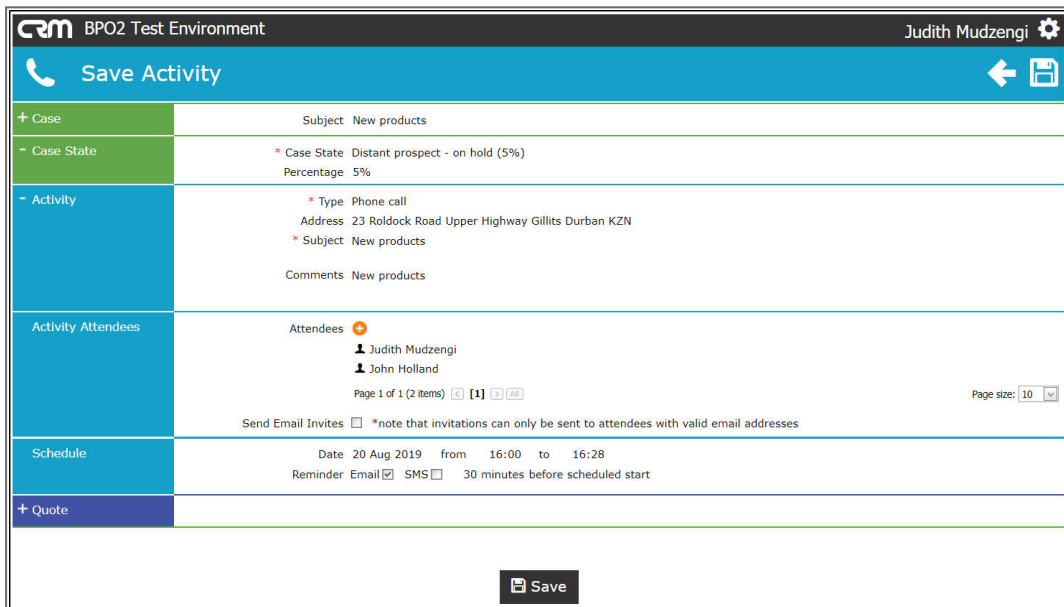
Page 1 of 1 (4 items) [1] [2] [3] [4] Page size: 10

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**.

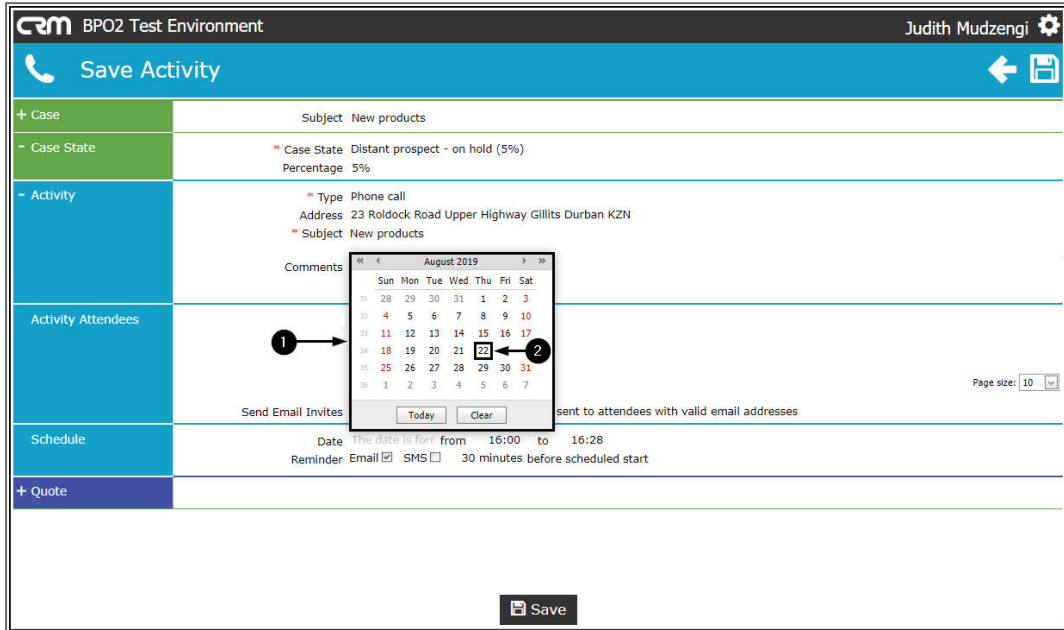
The screenshot shows the 'Save Activity' form in a CRM system. The form is titled 'Save Activity' and is in the 'BPO2 Test Environment'. The user is 'Judith Mudzengi'. The form has several sections: 'Case' (Subject: New products), 'Case State' (Distant prospect - on hold (5%), Percentage: 5%), 'Activity' (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), 'Schedule' (Date: 20 Aug 2019, from 16:00 to 16:28, Reminder: Email [checked], SMS [unchecked], 30 minutes before scheduled start), and 'Quote'. A 'Save' button is at the bottom.

Adjust the Date

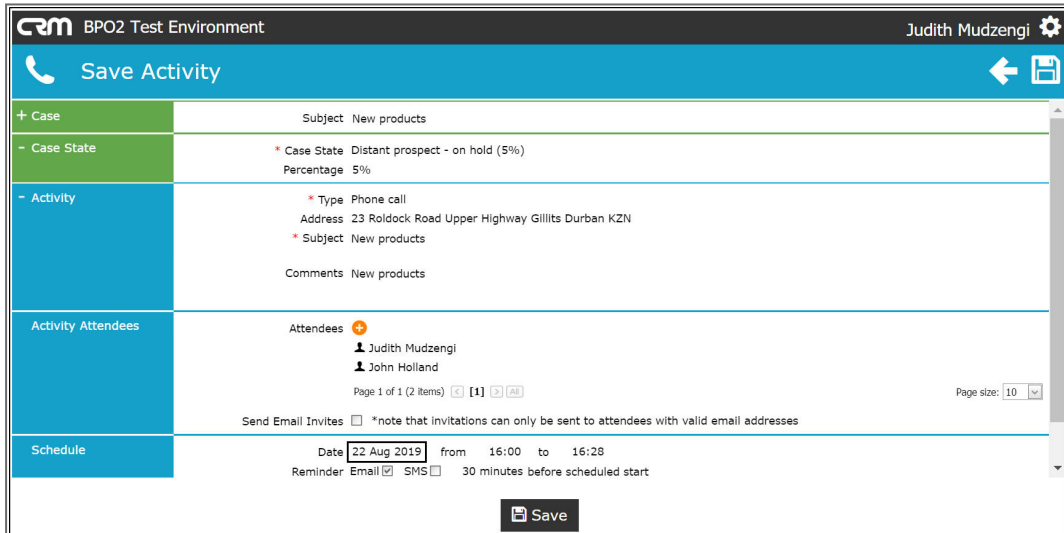
1. Hover over the **Date** field, a **down arrow** will be displayed. Click on this **arrow**.

This screenshot is identical to the previous one, but with a small change: a small downward-pointing arrow is now visible next to the 'Date' field in the 'Schedule' section, indicating that a dropdown menu is available for selecting a different date.

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

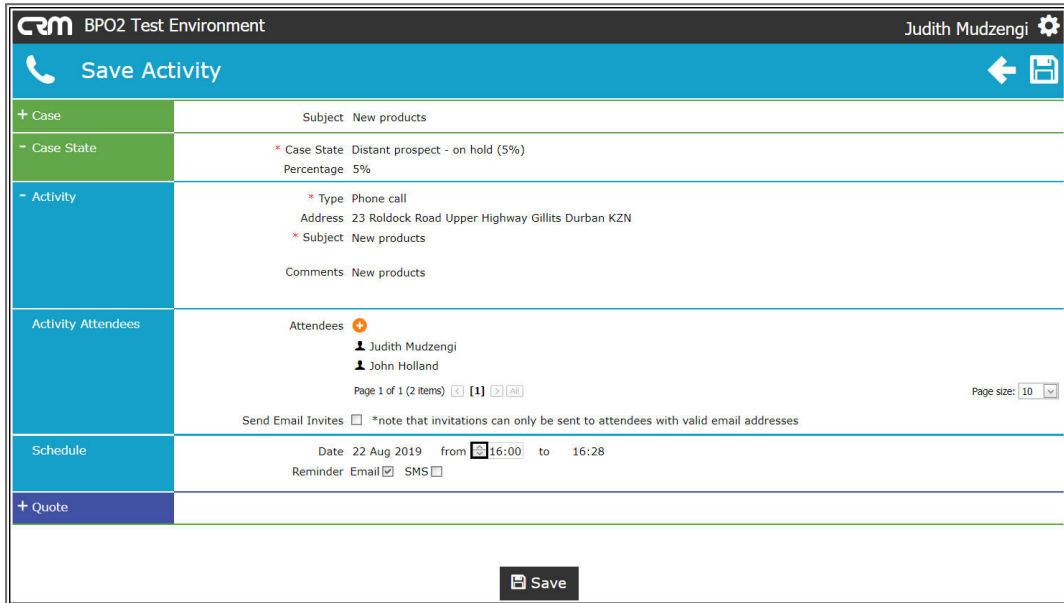


- The **Date** field will now be populated with the selected date.



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 'BPO2 Test Environment' with the user 'Judith Mudzengi'. The main form is titled 'Save Activity' and contains 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

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.

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 +
Judith Mudzengi
John Holland
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 16:28
Reminder Email SMS 30 minutes before scheduled start

+ Quote

Save

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

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 +
Judith Mudzengi
John Holland
Page 1 of 1 (2 items) Page size: 10

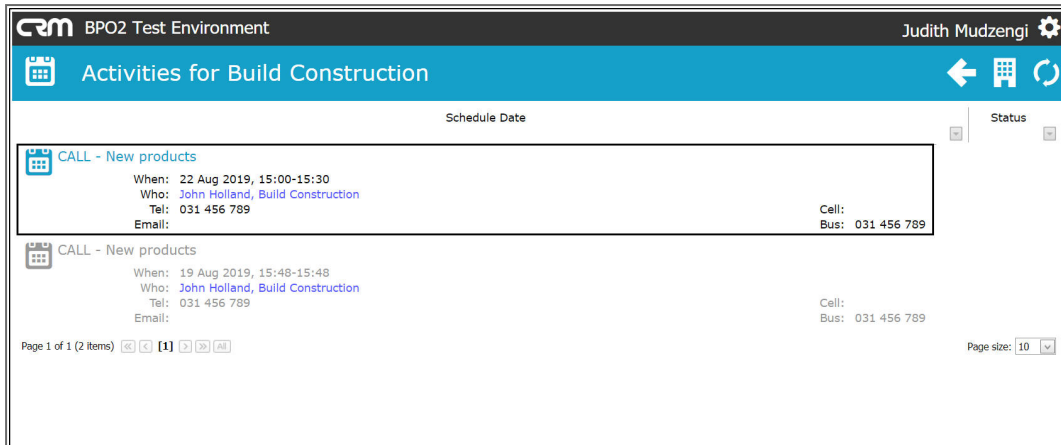
Send Email Invites *note that invitations can only be sent to attendees with valid email addresses

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

+ Quote

Save

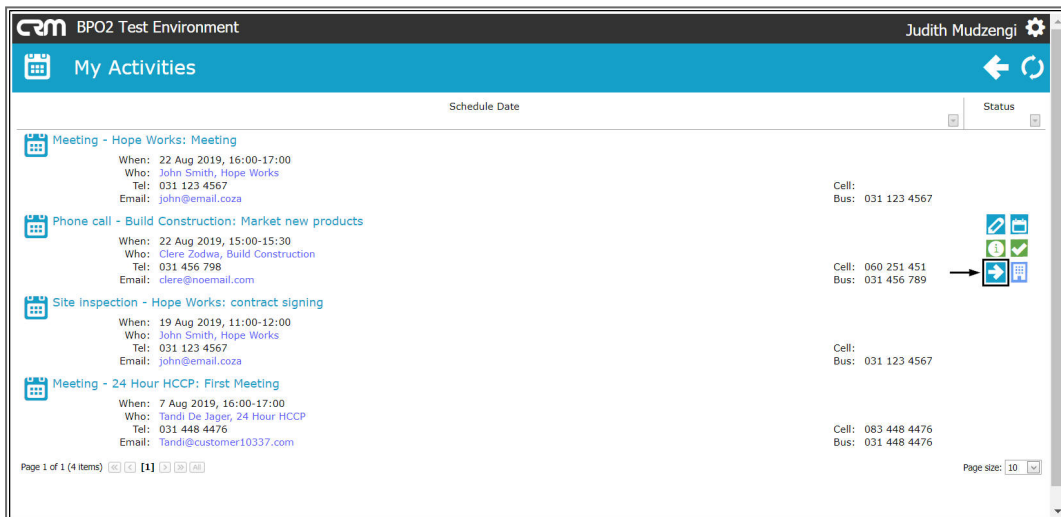
- The **Activities for []** screen will be displayed.
- The rescheduled activity will be displayed in this screen.



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.

CRM BPO2 Test Environment Judith Mudzengi

Next Activity

Case	Subject New cement products
Case State	* Case State Cold Call (10%) Percentage 10%
Completed Activity	Summary Clere Zodwa - Build Construction Market new products 2019/08/22 3:00 PM-3:30 PM * Notes Completion notes about activity
New Activity	* Type activity type * Subject The subject of the activity Comments information relating to the activity Address 3 Colinton Road Gillits Upper Highway KZN
Activity Attendees	Attendees Judith Mudzengi Clere Zodwa Page 1 of 1 (2 items) [1] [2] [3] Send Email Invites <input type="checkbox"/> *note that invitations can only be sent to attendees with valid email addresses
Schedule	Date 27 Aug 2019 from 16:00 to 17:00
Reminder	Reminder Email <input type="checkbox"/> SMS <input type="checkbox"/> 30 minutes before scheduled start

Save

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

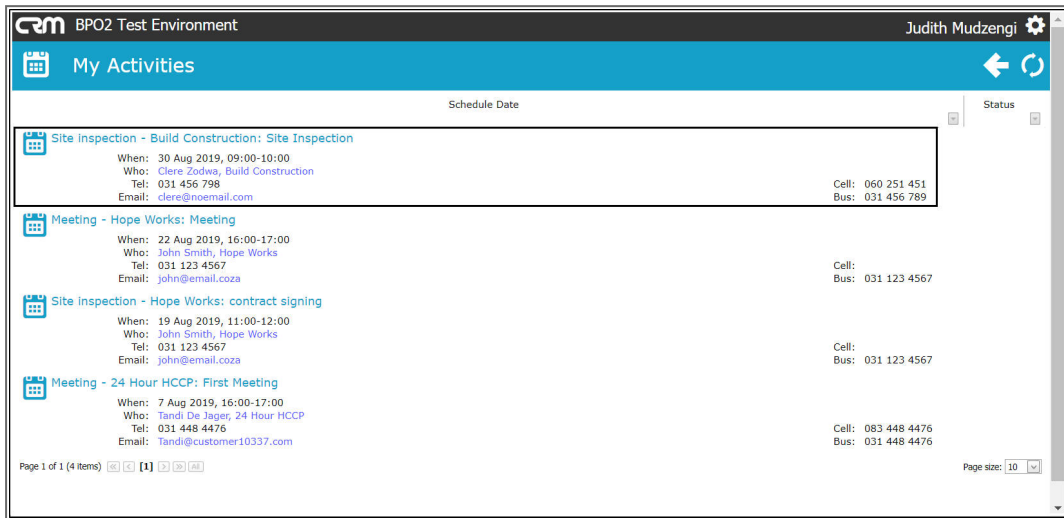
CRM BPO2 Test Environment Judith Mudzengi

Next Activity

Case	Subject New cement products
Case State	* Case State Cold Call (10%) Percentage 10%
Completed Activity	Summary Clere Zodwa - Build Construction Market new products 2019/08/22 3:00 PM-3:30 PM * Notes Meeting was successful. Next activity - site visit
New Activity	* Type Site inspection * Subject Site Inspection Comments Site Inspection Address 3 Colinton Road Gillits Upper Highway KZN
Activity Attendees	Attendees Judith Mudzengi Clere Zodwa Page 1 of 1 (2 items) [1] [2] [3] Send Email Invites <input type="checkbox"/> *note that invitations can only be sent to attendees with valid email addresses
Schedule	Date 30 Aug 2019 from 09:00 to 10:00
Reminder	Reminder Email <input checked="" type="checkbox"/> SMS <input type="checkbox"/> 30 minutes before scheduled start

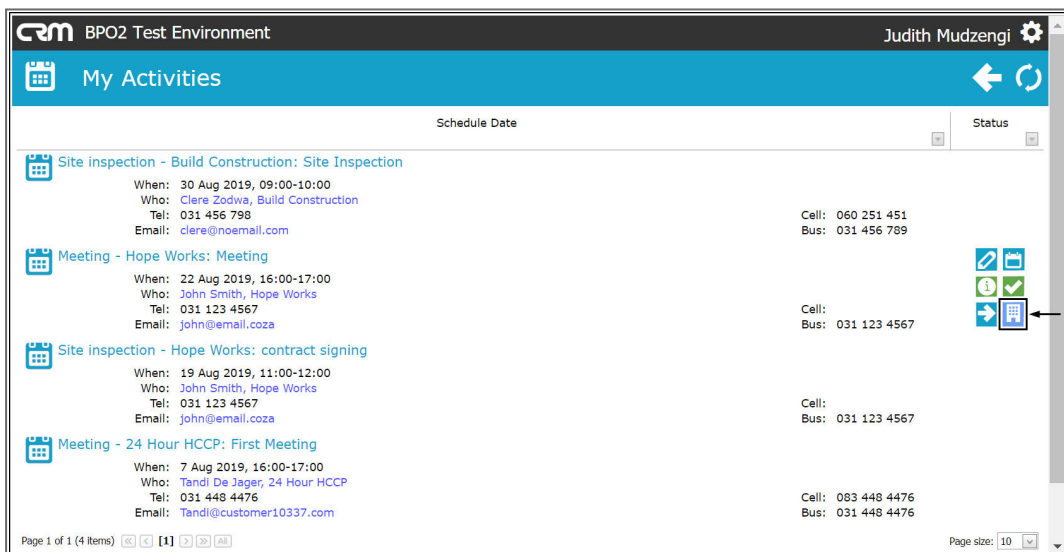
Save

- 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.



VIEW CUSTOMER

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



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

OTHER ACTION ITEMS

You can also

- [View Case Info and History](#)

and

- [Close a Case.](#)

The screenshot shows the 'My Activities' page in a CRM system. The page header includes 'CRM BPO2 Test Environment' and the user name 'Judith Mudzengi'. The main content area lists four activities, each with a calendar icon and a title. The activities are:

- 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: 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

At the bottom of the list, it says 'Page 1 of 1 (4 items)'. On the right side, there are navigation icons and a 'Page size: 10' dropdown menu.

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