

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

CRM BASICS

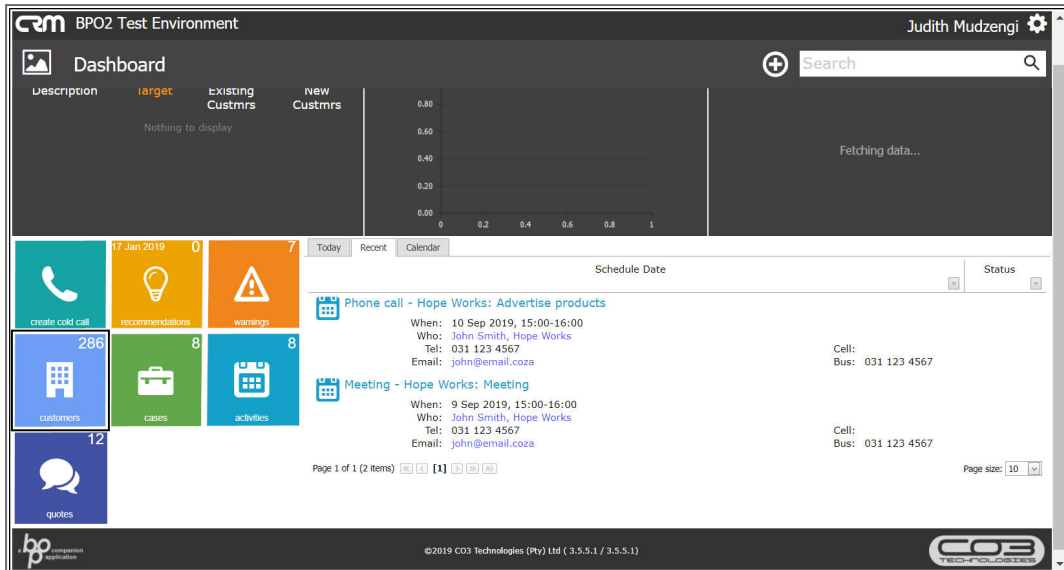
COLD CALL

- A Cold Call is a quick and easy way to raise a new Customer, Contact, Address, Case and Activity.
- A Cold Call can also be created for existing customers.
- A Cold Call for New or Existing Customers can be created from the **Homepage** or the **Customer Homepage** . Either of these processes will direct you to the Create Cold Call screen with the Customer frame clear of any details.
- A **Create Cold Call for Customer** Action button has been added to the Customer Dashboard Information frame. Navigating from this button will auto populate the selected Customer Details.

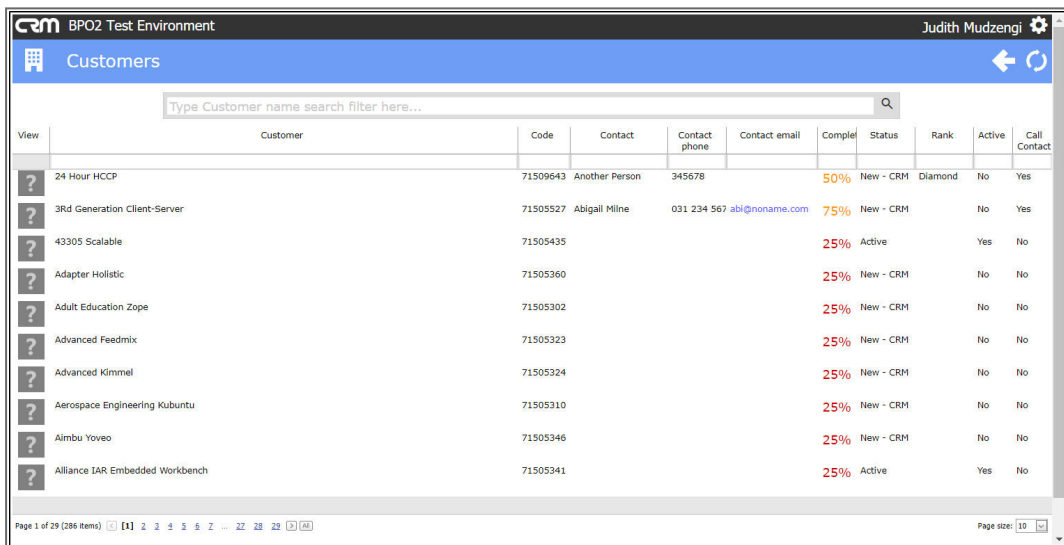
Ribbon Access: Webpage > [http://\[servername\]:\[port-no\]/BPOCRM/User.aspx](http://[servername]:[port-no]/BPOCRM/User.aspx)

ACCESS COLD CALLS FROM CUSTOMER DASHBOARD

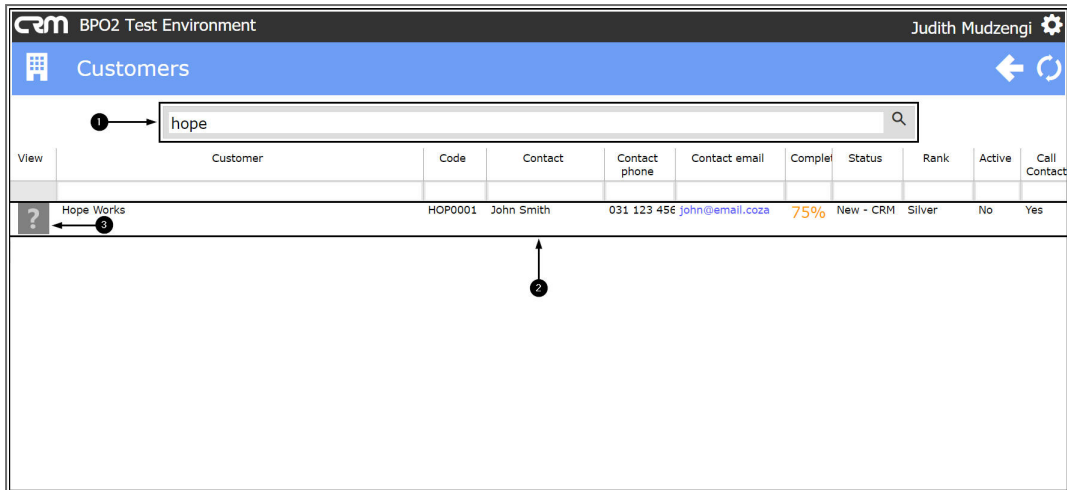
- Click on the **Customers** tile from the **Dashboard** .



- The **Customers** screen will be displayed.
- A list of customers will be displayed.

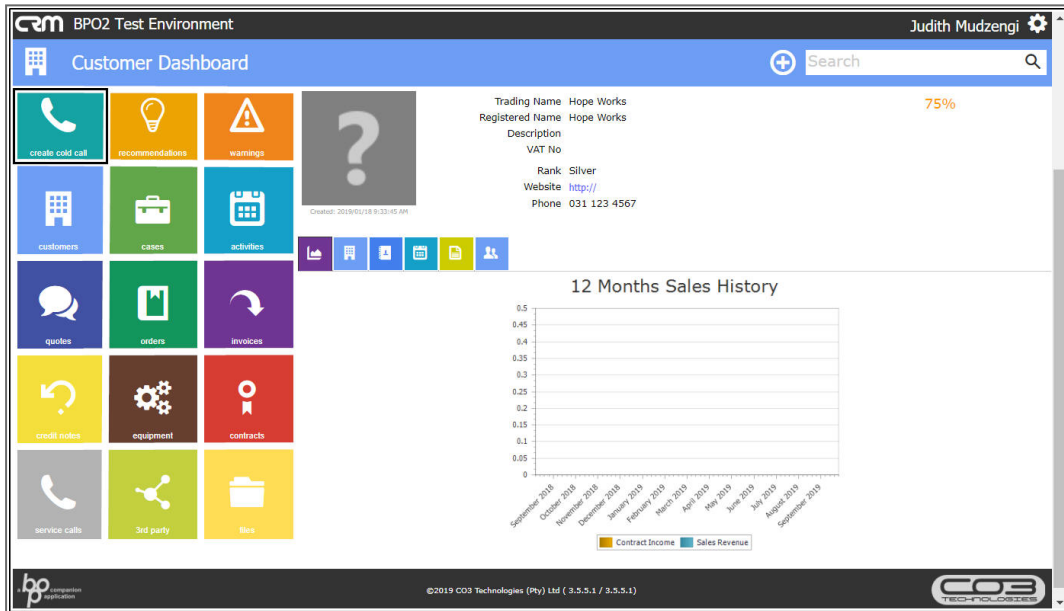


1. Type in the **customer name** that you wish to create a cold call for in the **Search** bar.
2. The system will filter for and display that customer in the list.
3. Click on the **Customer icon** in the **View** column.



The **Customer Dashboard** screen will be displayed.

- Click on the **Create Cold Call** tile.



The **Create Cold Call** screen will be displayed.

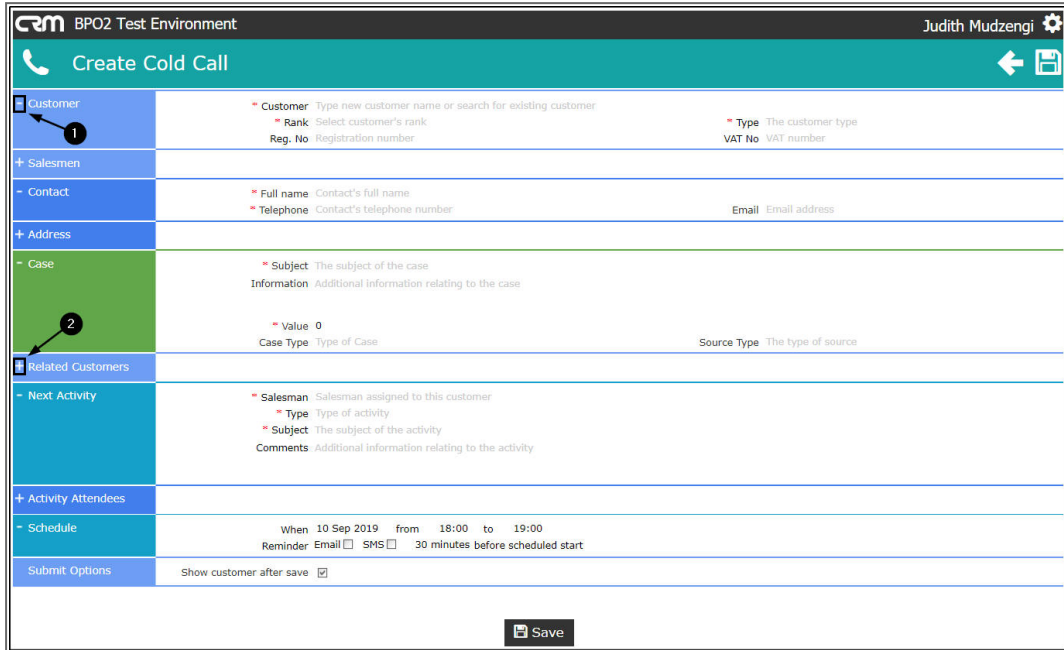
1. Click on the [-] sign to view more details.
2. Click on the [+] sign to view less details.

ACCESS COLD CALLS FROM THE DASHBOARD

1. Click on the **Create Cold Call** in the **Dashboard** (Home page).

The **Create Cold Call** screen will be displayed.

1. Click on the [-] sign to view more details.
2. Click on the [+] sign to view less details.



CREATE COLD CALL FOR NEW CUSTOMER

Customer F rame

- **Customer:**
 1. For a new customer, type in the Customer Name.
 2. As you type, companies with similar names will appear to help prevent duplicates.

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Create Cold Call

Customer

- Customer** **CRB**
- Rank** **3Rd**
- Reg. No** **71504184**
- Type** **The customer type**
- VAT No** **VAT number**

Code	Name	Registered Name	Trading Name	Status
71503836	3Rd Generation Algori	3Rd Generation Algori	3Rd Generation Algori	N
71504184	3Rd Generation Polaris	3Rd Generation Polaris	3Rd Generation Polaris	N
71507930	3Rd Generation Solutor	3Rd Generation Solutor	3Rd Generation Solutor	N
71508725	3Rd Generation Yeast	3Rd Generation Yeast	3Rd Generation Yeast	A
71509011	4205 Asymmetric	4205 Asymmetric	4205 Asymmetric	A
71507793	4Th Generation Shuffel	4Th Generation Shuffel	4Th Generation Shuffel	N
71509033	6Th Generation Client-C	6Th Generation Client-C	6Th Generation Client-C	A

Case

- Subject** The subject of the case
- Information** Additional information relating to the case
- Value** 0
- Case Type** Type of Case
- Source Type** The type of source

Next Activity

- Salesman** Salesman assigned to this customer
- Type** Type of activity
- Subject** The subject of the activity
- Comments** Additional information relating to the activity

Schedule

When 11 Sep 2019 from 11:00 to 12:00
 Reminder: Email SMS 30 minutes before scheduled start

Submit Options Show customer after save

Save

- **Rank:** Click on the **drop-down arrow** and select the relevant rank.
- **Reg No:** Type in the company registration no, if applicable.
- **Type:** Click on the **drop-down arrow** and select the relevant type.
- **VAT No:** Type in the company VAT number, if applicable.

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Create Cold Call

Customer

- Customer** Riverside Investments
- Rank** Select customer's rank
- Reg. No** Registration number
- Type** The customer type
- VAT No** VAT number

Contact

- Full name** Contact's full name
- Telephone** Contact's telephone number
- Email** Email address

Case

- Subject** The subject of the case
- Information** Additional information relating to the case
- Value** 0
- Case Type** Type of Case
- Source Type** The type of source

Next Activity

- Salesman** Judith Mudzengi
- Type** Type of activity
- Subject** The subject of the activity
- Comments** Additional information relating to the activity

Schedule

When 11 Sep 2019 from 12:00 to 13:00
 Reminder: Email SMS 30 minutes before scheduled start

Submit Options Show customer after save

Save

Salesmen Frame

- Select the checkboxes in front of the salesmen that will be linked to this customer. These marked salesmen will be available for selection if you are raising this cold call to assign to another salesman.

The screenshot shows the 'Create Cold Call' form in a CRM system. The 'Salesmen' section is highlighted with a black box and an arrow pointing to the right, indicating where users should select salesmen for the call. The form includes the following sections:

- Customer:** Customer: Riverside Investments, Rank: Diamond (5 days), Reg. No: 789065, Type: Construction, VAT No: 908754637
- Salesmen:** A list of salesmen with checkboxes for selection:

<input type="checkbox"/> Abigail Milne	<input type="checkbox"/> Chris Haynes	<input type="checkbox"/> Judith Mudzengi
<input type="checkbox"/> Adelle Weeder	<input type="checkbox"/> CO3 Admin	<input type="checkbox"/> Kashmira Nirthin
<input type="checkbox"/> Alex Spangenberg	<input type="checkbox"/> Colin Holden	<input type="checkbox"/> Kasia Matland
<input type="checkbox"/> Almeria Teacy	<input type="checkbox"/> Dalene Pillay	<input type="checkbox"/> Kim Engelbrecht
<input type="checkbox"/> Andromache Joselevitch	<input type="checkbox"/> Darryl Muller	<input type="checkbox"/> Lucky Mavuye
<input type="checkbox"/> Angie Roseborough	<input type="checkbox"/> Debbie Lugar	<input type="checkbox"/> Malory Allibon
<input type="checkbox"/> Armando Riechelt	<input type="checkbox"/> Derrick Weeder	<input type="checkbox"/> Marc Rappold
<input type="checkbox"/> Ary Huelin	<input type="checkbox"/> Edwile Mskova	<input type="checkbox"/> Marius Engelbrecht
- Contact:** Full name, Telephone, Email
- Address:** Address field
- Case:** Subject, Information, Value, Case Type, Source Type
- Related Customers:** Related Customers field
- Next Activity:** Salesman, Type, Subject, Comments
- Activity Attendees:** Activity Attendees field
- Schedule:** When, from, to, Reminder
- Submit Options:** Show customer after save

Contact Frame

- **Full Name:** Type in the full name of the customer contact.
- **Telephone:** Type in the telephone number of the customer contact.
- **Email Address:** Type in the email address of the customer contact.

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Judith Mudzengi

📞 Create Cold Call
←
📄

Customer	* Customer Riverside Investments * Rank Diamond (5 days) Reg. No 789065	* Type Construction VAT No 908754637																					
Salesmen	<table style="width: 100%; border-collapse: collapse;"> <tr> <td><input checked="" type="checkbox"/> Abigail Hillne</td> <td><input type="checkbox"/> Chris Haynes</td> <td><input checked="" type="checkbox"/> Judith Mudzengi</td> </tr> <tr> <td><input type="checkbox"/> Adele Weeder</td> <td><input checked="" type="checkbox"/> CO3 Admin</td> <td><input type="checkbox"/> Kashmira Nirghin</td> </tr> <tr> <td><input type="checkbox"/> Alex Spangenberg</td> <td><input type="checkbox"/> Colin Holden</td> <td><input type="checkbox"/> Kessia Maltland</td> </tr> <tr> <td><input checked="" type="checkbox"/> Almeria Teacy</td> <td><input type="checkbox"/> Dalena Pillay</td> <td><input type="checkbox"/> Kim Engelbrecht</td> </tr> <tr> <td><input type="checkbox"/> Andromache Joselevitch</td> <td><input type="checkbox"/> Darryl Muller</td> <td><input type="checkbox"/> Lucky Mavuye</td> </tr> <tr> <td><input type="checkbox"/> Angie Roseborough</td> <td><input type="checkbox"/> Debbie Lugar</td> <td><input type="checkbox"/> Malory Allibon</td> </tr> <tr> <td><input type="checkbox"/> Armando Reichelt</td> <td><input type="checkbox"/> Derrick Weeder</td> <td><input type="checkbox"/> Marc Reppold</td> </tr> </table>		<input checked="" type="checkbox"/> Abigail Hillne	<input type="checkbox"/> Chris Haynes	<input checked="" type="checkbox"/> Judith Mudzengi	<input type="checkbox"/> Adele Weeder	<input checked="" type="checkbox"/> CO3 Admin	<input type="checkbox"/> Kashmira Nirghin	<input type="checkbox"/> Alex Spangenberg	<input type="checkbox"/> Colin Holden	<input type="checkbox"/> Kessia Maltland	<input checked="" type="checkbox"/> Almeria Teacy	<input type="checkbox"/> Dalena Pillay	<input type="checkbox"/> Kim Engelbrecht	<input type="checkbox"/> Andromache Joselevitch	<input type="checkbox"/> Darryl Muller	<input type="checkbox"/> Lucky Mavuye	<input type="checkbox"/> Angie Roseborough	<input type="checkbox"/> Debbie Lugar	<input type="checkbox"/> Malory Allibon	<input type="checkbox"/> Armando Reichelt	<input type="checkbox"/> Derrick Weeder	<input type="checkbox"/> Marc Reppold
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Contact	* Full name <small>Contact's full name</small> * Telephone <small>Contact's telephone number</small>																						
Address	Email <small>Email address</small>																						
Case	* Subject <small>The subject of the case</small> Information <small>Additional information relating to the case</small> * Value 0 Case Type <small>Type of Case</small>																						
+ Related Customers																							
Next Activity	* Salesman Judith Mudzengi * Type <small>Type of activity</small> * Subject <small>The subject of the activity</small> Comments <small>Additional information relating to the activity</small>																						
+ Activity Attendees																							
Schedule	When 12 Sep 2019 from 11:00 to 12:00 Reminder Email <input type="checkbox"/> SMS <input type="checkbox"/> 30 minutes before scheduled start																						

Save

Address Frame

- **Existing:** Click on the drop-down arrow and select **New** .
- **Address Line 1 and 2:** Type in the relevant customer address details.
- **Suburb:** Type in the name of the suburb.
- **City:** Type in the city.
- **Province / State:** Type in the Province / State.
- **Post Code:** Type in the postal code.
- **Country:** Type in the country.

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Judith Mudzengi

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Create Cold Call

Customer	* Customer: Riverside Investments * Rank: Diamond (5 days) Reg. No: 789065 * Type: Construction VAT No: 908754627																								
Salesmen	<table style="width: 100%; border: none;"> <tr> <td style="border: none;"><input checked="" type="checkbox"/> Abigail Milne</td> <td style="border: none;"><input type="checkbox"/> Chris Haynes</td> <td style="border: none;"><input checked="" type="checkbox"/> Judith Mudzengi</td> </tr> <tr> <td style="border: none;"><input type="checkbox"/> Adele Weeder</td> <td style="border: none;"><input checked="" type="checkbox"/> CO3 Admin</td> <td style="border: none;"><input type="checkbox"/> Kashmiria Nirghin</td> </tr> <tr> <td style="border: none;"><input type="checkbox"/> Alex Spangenberg</td> <td style="border: none;"><input type="checkbox"/> Colin Holden</td> <td style="border: none;"><input type="checkbox"/> Kessia Maitland</td> </tr> <tr> <td style="border: none;"><input checked="" type="checkbox"/> Almeria Teacy</td> <td style="border: none;"><input type="checkbox"/> Dalene Pillay</td> <td style="border: none;"><input type="checkbox"/> Kim Engelbrecht</td> </tr> <tr> <td style="border: none;"><input type="checkbox"/> Andromache Joselevitch</td> <td style="border: none;"><input type="checkbox"/> Darryl Muller</td> <td style="border: none;"><input type="checkbox"/> Lucky Mawuye</td> </tr> <tr> <td style="border: none;"><input type="checkbox"/> Angie Roseborough</td> <td style="border: none;"><input type="checkbox"/> Debbie Luger</td> <td style="border: none;"><input type="checkbox"/> Malory Allibon</td> </tr> <tr> <td style="border: none;"><input type="checkbox"/> Armando Reichelt</td> <td style="border: none;"><input type="checkbox"/> Derrick Weeder</td> <td style="border: none;"><input type="checkbox"/> Marc Ragsold</td> </tr> <tr> <td style="border: none;"><input type="checkbox"/> Arv Huelin</td> <td style="border: none;"><input type="checkbox"/> Edvial Msakiva</td> <td style="border: none;"><input type="checkbox"/> Marius Engelbrecht</td> </tr> </table>	<input checked="" type="checkbox"/> Abigail Milne	<input type="checkbox"/> Chris Haynes	<input checked="" type="checkbox"/> Judith Mudzengi	<input type="checkbox"/> Adele Weeder	<input checked="" type="checkbox"/> CO3 Admin	<input type="checkbox"/> Kashmiria Nirghin	<input type="checkbox"/> Alex Spangenberg	<input type="checkbox"/> Colin Holden	<input type="checkbox"/> Kessia Maitland	<input checked="" type="checkbox"/> Almeria Teacy	<input type="checkbox"/> Dalene Pillay	<input type="checkbox"/> Kim Engelbrecht	<input type="checkbox"/> Andromache Joselevitch	<input type="checkbox"/> Darryl Muller	<input type="checkbox"/> Lucky Mawuye	<input type="checkbox"/> Angie Roseborough	<input type="checkbox"/> Debbie Luger	<input type="checkbox"/> Malory Allibon	<input type="checkbox"/> Armando Reichelt	<input type="checkbox"/> Derrick Weeder	<input type="checkbox"/> Marc Ragsold	<input type="checkbox"/> Arv Huelin	<input type="checkbox"/> Edvial Msakiva	<input type="checkbox"/> Marius Engelbrecht
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Contact	* Full name: Joel Reeds * Telephone: 031 210 455 Email: joelreeds@email.com																								
Address	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 2px;">Existing</td> <td style="width: 50%; padding: 2px;">Address for the contact</td> </tr> <tr> <td style="padding: 2px;">Address Line 1</td> <td style="padding: 2px;">Address Line 1</td> </tr> <tr> <td style="padding: 2px;">Address Line 2</td> <td style="padding: 2px;">Address Line 2</td> </tr> <tr> <td style="padding: 2px;">Suburb</td> <td style="padding: 2px;">Suburb</td> </tr> <tr> <td style="padding: 2px;">City</td> <td style="padding: 2px;">City</td> </tr> <tr> <td style="padding: 2px;">Province/State</td> <td style="padding: 2px;">Province/State</td> </tr> <tr> <td style="padding: 2px;">Post Code</td> <td style="padding: 2px;">Post Code</td> </tr> <tr> <td style="padding: 2px;">Country</td> <td style="padding: 2px;">Country...</td> </tr> </table>	Existing	Address for the contact	Address Line 1	Address Line 1	Address Line 2	Address Line 2	Suburb	Suburb	City	City	Province/State	Province/State	Post Code	Post Code	Country	Country...								
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Address Line 2	Address Line 2																								
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Province/State	Province/State																								
Post Code	Post Code																								
Country	Country...																								
Case	* Subject: The subject of the case Information: Additional information relating to the case * Value: 0 Case Type: Type of Case Source Type: The type of source																								
+ Related Customers																									
+ Next Activity	* Salesman: Judith Mudzengi * Type: Type of activity * Subject: The subject of the activity Comments: Additional information relating to the activity																								
+ Activity Attendees																									
+ Schedule	When: 12 Sep 2019 from 11:00 to 12:00 Reminder: Email <input type="checkbox"/> SMS <input type="checkbox"/> 30 minutes before scheduled start																								
Submit Options	Show customer after save: <input checked="" type="checkbox"/>																								

Save

Case Frame

- **Subject:** Type in the subject of the case.
- **Information:** Type in additional information relating to the case if applicable.
- **Value:** Type in the estimated value of the case.
- **Case Type:** Click on the drop-down arrow and select from the list, the relevant case type.
- **Source Type:** (Where did you obtain this customer contact e.g. was this customer 'recommended' or 'referred'.) Click on the drop-down arrow and select from the list, the relevant source type.

CRM BPO2 Test Environment Judith Mudzengi

Create Cold Call

Customer
 * Customer: Riverside Investments
 * Rank: Diamond (5 days)
 * Type: Construction
 Reg. No: 789065 VAT No: 908754637

Salesmen
 Abigail Milne
 Adèle Weeder
 Alex Spangenberg
 Almeria Teacy
 Andromache Joselevitch
 Angie Roseborough
 Armando Reichelt
 Arv Huelin
 Chris Haynes
 CO3 Admin
 Colin Holden
 Dalene Pillay
 Darryl Muller
 Debbie Luger
 Derrick Weeder
 Edwile Maakva
 Judith Mudzengi
 Kashmira Ilirghin
 Kestla Maibland
 Kim Engelbrecht
 Lucky Mavuye
 Malory Allison
 Marc Reppold
 Marius Encebrecht

Contact
 * Full name: Joel Reeds
 * Telephone: 031 210 455
 Email: joelreeds@email.com

Address
 Existing New
 Address Line 1: 12 Salby Court
 Address Line 2: 7 Colinton Rd
 Suburb: Gillits
 City: Durban
 Province/State: KZN
 Post Code: 4000
 Country: RSA

Case
 * Subject: The subject of the case
 Information: Additional information relating to the case
 * Value: 0
 Case Type: Type of case
 Source Type: The type of source

Related Customers

Next Activity
 * Salesman: Judith Mudzengi
 * Type: Type of activity
 * Subject: The subject of the activity
 Comments: Additional information relating to the activity

Activity Attendees

Schedule
 When: 11 Sep 2019 from 12:00 to 12:00
 Reminder: Email SMS 30 minutes before scheduled start

Submit Options
 Show customer after save

Save

Related Customer Frame

You have the ability to link **Related Customers**. This enables you to invite contacts from various clients to an activity - such as a meeting or training session.

If you do not need to link a **Related Customer**, you can move on to the **Activity frame**.

Add Related Customer

1. Click on the drop-down arrow and select the relevant **customer** from the list.
2. Click on the [+] button to save this customer to this frame.

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📞 ← 📄

+ Customer

* Customer Riverside Investments

* Rank Diamond (5 days)

Reg. No 789065

* Type Construction

VAT No 908754637

+ Salesmen

<input checked="" type="checkbox"/> Abigail Milne	<input type="checkbox"/> Chris Haynes	<input checked="" type="checkbox"/> Judith Mudzengi
<input type="checkbox"/> Adele Weeder	<input checked="" type="checkbox"/> CO3 Admin	<input type="checkbox"/> Kashmira Nirghin
<input type="checkbox"/> Alex Spangenberg	<input type="checkbox"/> Colin Holden	<input type="checkbox"/> Kessia Maitland
<input checked="" type="checkbox"/> Almeria Teacy	<input type="checkbox"/> Dalene Pillay	<input type="checkbox"/> Kim Engelbrecht
<input type="checkbox"/> Andromache Joselevitch	<input type="checkbox"/> Darryl Muller	<input type="checkbox"/> Lucky Mavuyeh
<input type="checkbox"/> Angie Roseborough	<input type="checkbox"/> Debbie Lugar	<input type="checkbox"/> Malory Allibon
<input type="checkbox"/> Armando Reichelt	<input type="checkbox"/> Derrick Weeder	<input type="checkbox"/> Marc Rapsold
<input type="checkbox"/> Arv Huelin	<input type="checkbox"/> Edwail Maskiva	<input type="checkbox"/> Marius Enzelbrecht

+ Contact

* Full name Joel Reeds

* Telephone 031 210 455

Email joelreeds@email.com

+ Address

Existing ↔ New

Address Line 1 12 Selby Court

Address Line 2 7 Colinton Rd

Suburb Gillits

City Durban

Province/State KZN

Post Code 4000

Country RSA

+ Case

* Subject Market New Products

Information Market New Products

* Value 200000

Case Type New Customer

Source Type Referral

+ Related Customers

Related Customers + - 🗑️ Deleted Customers

No data to display

+ Next Activity

* Salesman Judith Mudzengi

* Type Type of activity

* Subject The subject of the activity

Comments additional information relating to the activity

+ Activity Attendees

+ Schedule

When 11 Sep 2019 from 12:00 to 13:00

Reminder Email SMS 30 minutes before scheduled start

+ Submit Options

Show customer after save

Save

Delete Related Customer

- Click on the **Delete** icon if you wish to remove a linked related customer.

CRM BPO2 Test Environment
Judith Mudzengi

☎ ➔ 📄

Customer

* Customer: Riverside Investments
 * Rank: Diamond (5 days)
 Reg. No: 789065

* Type: Construction
 VAT No: 908754637

Salesmen

<input checked="" type="checkbox"/> Abigail Milne	<input type="checkbox"/> Chris Haynes	<input checked="" type="checkbox"/> Judith Mudzengi
<input type="checkbox"/> Adele Weeder	<input checked="" type="checkbox"/> CO3 Admin	<input type="checkbox"/> Kashmiria Kirghin
<input type="checkbox"/> Alex Spangenberg	<input type="checkbox"/> Colin Holden	<input type="checkbox"/> Kessia Maitland
<input checked="" type="checkbox"/> Almeria Teacy	<input type="checkbox"/> Dalene Pillay	<input type="checkbox"/> Kim Engelbrecht
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<input type="checkbox"/> Angie Roseborough	<input type="checkbox"/> Debbie Lugar	<input type="checkbox"/> Malory Allibon
<input type="checkbox"/> Armando Reichelt	<input type="checkbox"/> Derrick Weeder	<input type="checkbox"/> Marc Repsold
<input type="checkbox"/> Ann-Marie	<input type="checkbox"/> Edward Meehan	<input type="checkbox"/> Megan Engelbrecht

Contact

* Full name: Joel Reeds
 * Telephone: 031 210 455
 Email: joelreeds@email.com

Address

Existing New

Address Line 1: 12 Salby Court
 Address Line 2: 7 Colinton Rd
 Suburb: Gillits
 City: Durban
 Province/State: KZN
 Post Code: 4000
 Country: RSA

Case

* Subject: Market New Products
 Information: Market New Products

* Value: 200000
 Case Type: New Customer
 Source Type: Referral

Related Customers

Related Customers: ● Hope Works: HOP0001
■ Hope Works - HOP0001

Next Activity

* Salesman: Judith Mudzengi
 * Type: Type of activity
 * Subject: The subject of the activity
 Comments: Additional information relating to the activity

Activity Attendees

Schedule

When: 11 Sep 2019 from 16:00 to 17:00
 Reminder: Email SMS 30 minutes before scheduled start

Submit Options

Show customer after save:

Save

Next Activity Frame

- **Salesman:** The person currently logged on to the system will be selected by default. You can assign this Customer, Case and Activity to another salesman, if you are raising this cold call on their behalf.
 - To assign this case to another salesman, click on the **drop-down arrow** and select the relevant salesman.
 - **Note:** You will only be able to assign the case to one of the salesmen you selected in the **Salesmen frame**.
- **Type:** Select the type of Activity, e.g. 'Call'
- **Subject:** Type in the subject of the activity.

- **Comments:** This text box give you the opportunity to type in any additional information relating to the activity.

The screenshot shows the 'Create Cold Call' form in a CRM system. The form is divided into several sections:

- Customer:** * Customer: Riverside Investments; * Rank: Diamond (5 days); Reg. No: 789065; * Type: Construction; VAT No: 908754637
- Salesmen:** A list of salesmen with checkboxes, including Abigail Milne, Adele Weeder, Alex Spangenberg, Almeria Teacy, Andromache Joselevitch, Angie Roseborough, Armando Reichelt, Arvi Huelin, Chris Haynes, CO3 Admin, Colin Holden, Dalene Pillay, Darryl Muller, Debbie Lugar, Derrick Weeder, Edwiel Msakva, Judith Mudzengi, Kashmira Ningshin, Kessia Maitland, Kim Engelbrecht, Lucky Mavuyeye, Malory Allibon, Marc Repsold, and Marius Engelbrecht.
- Contact:** * Full name: Joel Reeds; * Telephone: 031 210 455; Email: joelreeds@email.com
- Address:** Existing New; Address Line 1: 12 Selby Court; Address Line 2: 7 Collinton Rd; Suburb: Gillits; City: Durban; Province/State: KZN; Post Code: 4000; Country: RSA
- Case:** * Subject: Market New Products; Information: Market New Products; * Value: 200000; Case Type: New Customer; Source Type: Referral
- Related Customers:** Related Customers: Hope Works: HOP0001; Hope Works - HOP0001
- Next Activity:** * Salesman: Judith Mudzengi; * Type: Type of activity; * Subject: The subject of the activity; Comments: Additional information relating to the activity (indicated by an arrow).
- Activity Attendees:** (Empty field)
- Schedule:** When: 12 Sep 2019 from 11:00 to 12:00; Reminder: Email SMS 30 minutes before scheduled start
- Submit Options:** Show customer after save

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

Activity Attendees Frame

It is only necessary to link Activity Attendees if you want to send email invites to these people to join an activity - such as a meeting. The attendees can accept or reject this request. If they accept, this activity will display as an event on their calendar.

1. The Salesman and Customer Contact will be linked as Activity Attendees by default (and cannot be removed).

2. You can also link other employees, case customer contacts and related customer contacts. To do so, click on the **drop-down arrow** and select the person from the list.
3. Then click on the ' + ' button.
4. Tick the **Send Email Invites** check box if you wish to send email invites to the attendees.
 - **Note:** The **Send Email Invites** option may be selected by default (**depending on the BPOCRM configuration**).

The screenshot shows the 'Create Cold Call' form with the following details:

- Customer:** Riverside Investments, Rank: Diamond (5 days), Reg. No: 783665, Type: Construction, VAT No: 908754637
- Salesmen:** A list of salesmen including Abigail Milne, Adele Weader, Alex Spangenberg, Almeria Tsoy, Andromache Joselevitch, Angie Roseborough, Armando Reichelt, Arv Huelin, Chris Haynes, CO3 Admin, Colin Holden, Dalene Pillay, Darryl Muller, Debbie Lugar, Derrick Weader, Edvill Maakva, Judith Mudzengi, Kashmiri Nirghin, Kaspera Matland, Kim Engelbracht, Lucky Mavuye, Malory Allibon, Marc Rappold, and Marius Enselbrecht.
- Contact:** Full name: Joel Reeds, Telephone: 031 210 455, Email: joelreeds@email.com
- Address:** Existing New, Address Line 1: 12 Selby Court, Address Line 2: 7 Colinton Rd, Suburb: Gillies, City: Durban, Province/State: KZN, Post Code: 4000, Country: RSA
- Case:** Subject: Market New Products, Information: Market New Products, Value: 200000, Case Type: New Customer, Source Type: Referral
- Related Customers:** Hope Works - HOP0001
- Next Activity:** Salesman: Judith Mudzengi, Type: Phone call, Subject: Market New Products, Comments: Market New Products
- Activity Attendees:** A list of attendees with checkboxes for 'Attendees' and 'Send Email Invites'. A note states: 'Case contact and salesman are always made attendees'.
- Schedule:** When: 12 Sep 2019, from: 11:00 to 12:00, Reminder: Email, SMS, 30 minutes before scheduled start
- Submit Options:** Show customer after save:

5. Click on the **Delete** icon if you wish to remove an attendee.

CRM BPO2 Test Environment
Judith Mudzengi

📞 Create Cold Call ← 📄

Customer	* Customer Riverside Investments * Rank Diamond (5 days) Reg. No 789065	* Type Construction VAT No 908753637			
Salesmen	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%; vertical-align: top;"> <input checked="" type="checkbox"/> Abigail Milne <input type="checkbox"/> Adele Weeder <input type="checkbox"/> Alex Spangenberg <input type="checkbox"/> Almeria Teacy <input type="checkbox"/> Andromache Joselevitch <input type="checkbox"/> Angie Roseborough <input type="checkbox"/> Armando Reichelt <input type="checkbox"/> Arv Huelin </td> <td style="width: 33%; vertical-align: top;"> <input type="checkbox"/> Chris Haynes <input checked="" type="checkbox"/> CO3 Admin <input type="checkbox"/> Colin Holden <input type="checkbox"/> Dalene Pillay <input type="checkbox"/> Darryl Muller <input type="checkbox"/> Debbie Lugar <input type="checkbox"/> Derrick Weeder <input type="checkbox"/> Edvill Maskva </td> <td style="width: 33%; vertical-align: top;"> <input checked="" type="checkbox"/> Judith Mudzengi <input type="checkbox"/> Kashmira Nirghin <input type="checkbox"/> Kessia Matland <input type="checkbox"/> Kim Engelbrecht <input type="checkbox"/> Lucky Mawaya <input type="checkbox"/> Malory Allibon <input type="checkbox"/> Marc Rapsold <input type="checkbox"/> Manus Enselbrecht </td> </tr> </table>		<input checked="" type="checkbox"/> Abigail Milne <input type="checkbox"/> Adele Weeder <input type="checkbox"/> Alex Spangenberg <input type="checkbox"/> Almeria Teacy <input type="checkbox"/> Andromache Joselevitch <input type="checkbox"/> Angie Roseborough <input type="checkbox"/> Armando Reichelt <input type="checkbox"/> Arv Huelin	<input type="checkbox"/> Chris Haynes <input checked="" type="checkbox"/> CO3 Admin <input type="checkbox"/> Colin Holden <input type="checkbox"/> Dalene Pillay <input type="checkbox"/> Darryl Muller <input type="checkbox"/> Debbie Lugar <input type="checkbox"/> Derrick Weeder <input type="checkbox"/> Edvill Maskva	<input checked="" type="checkbox"/> Judith Mudzengi <input type="checkbox"/> Kashmira Nirghin <input type="checkbox"/> Kessia Matland <input type="checkbox"/> Kim Engelbrecht <input type="checkbox"/> Lucky Mawaya <input type="checkbox"/> Malory Allibon <input type="checkbox"/> Marc Rapsold <input type="checkbox"/> Manus Enselbrecht
<input checked="" type="checkbox"/> Abigail Milne <input type="checkbox"/> Adele Weeder <input type="checkbox"/> Alex Spangenberg <input type="checkbox"/> Almeria Teacy <input type="checkbox"/> Andromache Joselevitch <input type="checkbox"/> Angie Roseborough <input type="checkbox"/> Armando Reichelt <input type="checkbox"/> Arv Huelin	<input type="checkbox"/> Chris Haynes <input checked="" type="checkbox"/> CO3 Admin <input type="checkbox"/> Colin Holden <input type="checkbox"/> Dalene Pillay <input type="checkbox"/> Darryl Muller <input type="checkbox"/> Debbie Lugar <input type="checkbox"/> Derrick Weeder <input type="checkbox"/> Edvill Maskva	<input checked="" type="checkbox"/> Judith Mudzengi <input type="checkbox"/> Kashmira Nirghin <input type="checkbox"/> Kessia Matland <input type="checkbox"/> Kim Engelbrecht <input type="checkbox"/> Lucky Mawaya <input type="checkbox"/> Malory Allibon <input type="checkbox"/> Marc Rapsold <input type="checkbox"/> Manus Enselbrecht			
Contact	* Full name Joel Reeds * Telephone 031 210 455 Email joelreeds@email.com				
Address	Existing <input type="checkbox"/> New <input checked="" type="checkbox"/> Address Line 1 12 Selby Court Address Line 2 7 Colinton Rd Suburb Gillits City Durban Province/State KZN Post Code 4000 Country RSA				
Case	* Subject Market New Products Information Market New Products * Value 200000 Case Type New Customer Source Type Referral				
Related Customers	Related Customers + Hope Works - HOP0001 + Hope Works - HOP0001 🗑️				
Next Activity	* Salesman Judith Mudzengi * Type Phone call * Subject Market New Products Comments Market New Products				
Activity Attendees	Attendees + John Smith: Hope Works + John Smith Page 1 of 1 (1 items) 📄 →				
Schedule	When 12 Sep 2019 from 13:00 to 14:00 Reminder Email <input type="checkbox"/> SMS <input type="checkbox"/> 30 minutes before scheduled start				
Submit Options	Show customer after save <input checked="" type="checkbox"/>				

Save

Schedule Section

- **When:** This field will be auto populated. Click on the **drop-down arrow** and select the relevant date.
- **From:** This field will be auto populated. Use the **up and down arrows** to select the relevant time.
- **To:** This field will be auto populated. Use the **up and down arrows** to select the relevant time.
- **Reminder:** If you wish to send a reminder to your attendees, you can choose whether to send the reminder by **Email** or **SMS**.
 1. Tick the **Email** check box if you wish to send the reminder by email.
 2. Tick the **SMS** check box if you wish to send the reminder by SMS.

3. ' **Reminder Time** ': You can also choose when to send the reminder by clicking on the **drop-down arrow** and selecting the appropriate time period.

- **Note:** Reminders will only work if your mobile number and email address have been configured in **BPO** .

Submit Options Section

- **Show customer after save:** This will be selected by default. Unselect if you do not wish to see the customer after saving.

CRM BPO2 Test Environment
Judith Mudzengi

📞 ➔ 📄

Customer

* Customer: Riverside Investments

* Rank: * Type: Construction

Reg. No: 789065 VAT No: 908753637

Salesmen

<input checked="" type="checkbox"/> Abigail Milne	<input type="checkbox"/> Chris Haynes	<input checked="" type="checkbox"/> Judith Mudzengi
<input type="checkbox"/> Adele Weeder	<input type="checkbox"/> CO3 Admin	<input type="checkbox"/> Kashmira Nirghin
<input type="checkbox"/> Alex Spangenberg	<input type="checkbox"/> Colin Holden	<input type="checkbox"/> Kessia Maitland
<input checked="" type="checkbox"/> Almeria Teacy	<input type="checkbox"/> Delene Pillay	<input type="checkbox"/> Kim Engelbrecht
<input type="checkbox"/> Andromache Joselevitch	<input type="checkbox"/> Derryl Muller	<input type="checkbox"/> Lucky Mavuye
<input type="checkbox"/> Angie Roseborough	<input type="checkbox"/> Debbie Lugar	<input type="checkbox"/> Malory Allibon
<input type="checkbox"/> Armando Raichelt	<input type="checkbox"/> Derrick Weeder	<input type="checkbox"/> Marc Repsold
<input type="checkbox"/> Arv Huelin	<input type="checkbox"/> Edvell Mtsakova	<input type="checkbox"/> Marius Enqelbrecht

Contact

* Full name: Joel Reads

* Telephone: 031 210 455

Email: joelreads@email.com

Address

Existing New

Address Line 1: 12 Selby Court

Address Line 2: 7 Collinton Rd

Suburb: Gillits

City: Durban

Province/State: KZN

Post Code: 4000

Country: RSA

Case

* Subject: Market New Products

Information: Market New Products

* Value: 200000

Case Type: New Customer

Source Type: Referral

Related Customers

Related Customers:

- Hope Works - HOP0001
- Hope Works - HOP0001

Next Activity

* Salesman: Judith Mudzengi

* Type: Phone call

* Subject: Market New Products

Comments: Market New Products

Activity Attendees

Attendees:

- John Smith: Hope Works
- John Smith

Page 1 of 1 (1 items)

Page size:

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

Schedule

When: 13 Sep 2019 from 11:00 to 12:00

Reminder: Email SMS 30 minutes before scheduled start

Submit Options

Show customer after save

Save

SAVE

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

CRM BPO2 Test Environment
Judith Mudzengi

📞 Create Cold Call
←

Customer

* Customer: Riverside Investments

* Rank: Diamond (5 days)

Reg. No: 789065

* Type: Construction

VAT No: 908753637

Salesmen

<input checked="" type="checkbox"/> Abigail Milne	<input type="checkbox"/> Chris Haynes	<input checked="" type="checkbox"/> Judith Mudzengi
<input type="checkbox"/> Adele Weeder	<input type="checkbox"/> CO3 Admin	<input type="checkbox"/> Kashmiri Nirghin
<input type="checkbox"/> Alex Spangenberg	<input type="checkbox"/> Colin Holden	<input type="checkbox"/> Kessia Maitland
<input checked="" type="checkbox"/> Almeria Teacy	<input type="checkbox"/> Delene Pillay	<input type="checkbox"/> Kim Engelbrecht
<input type="checkbox"/> Andromache Joselevitch	<input type="checkbox"/> Derryl Muller	<input type="checkbox"/> Lucky Mavuye
<input type="checkbox"/> Angie Roseborough	<input type="checkbox"/> Debbie Lugar	<input type="checkbox"/> Malory Allibon
<input type="checkbox"/> Armando Raichelt	<input type="checkbox"/> Derrick Weeder	<input type="checkbox"/> Marc Repsold
<input type="checkbox"/> Arv Huelin	<input type="checkbox"/> Edvill Msaikova	<input type="checkbox"/> Marius Enqelbrecht

Contact

* Full name: Joel Reads

* Telephone: 031 210 455

Email: joelreads@email.com

Address

Existing New

Address Line 1: 12 Selby Court

Address Line 2: 7 Collinton Rd

Suburb: Gillits

City: Durban

Province/State: KZN

Post Code: 4000

Country: RSA

Case

* Subject: Market New Products

Information: Market New Products

* Value: 200000

Case Type: New Customer

Source Type: Referral

Related Customers

Related Customers:

- Hope Works - HOP0001
- Hope Works - HOP0001

Next Activity

* Salesman: Judith Mudzengi

* Type: Phone call

* Subject: Market New Products

Comments: Market New Products

Activity Attendees

Attendees:

- John Smith: Hope Works
- John Smith

Page 1 of 1 (1 items) [1]

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

Schedule

When: 13 Sep 2019 from 11:00 to 12:00

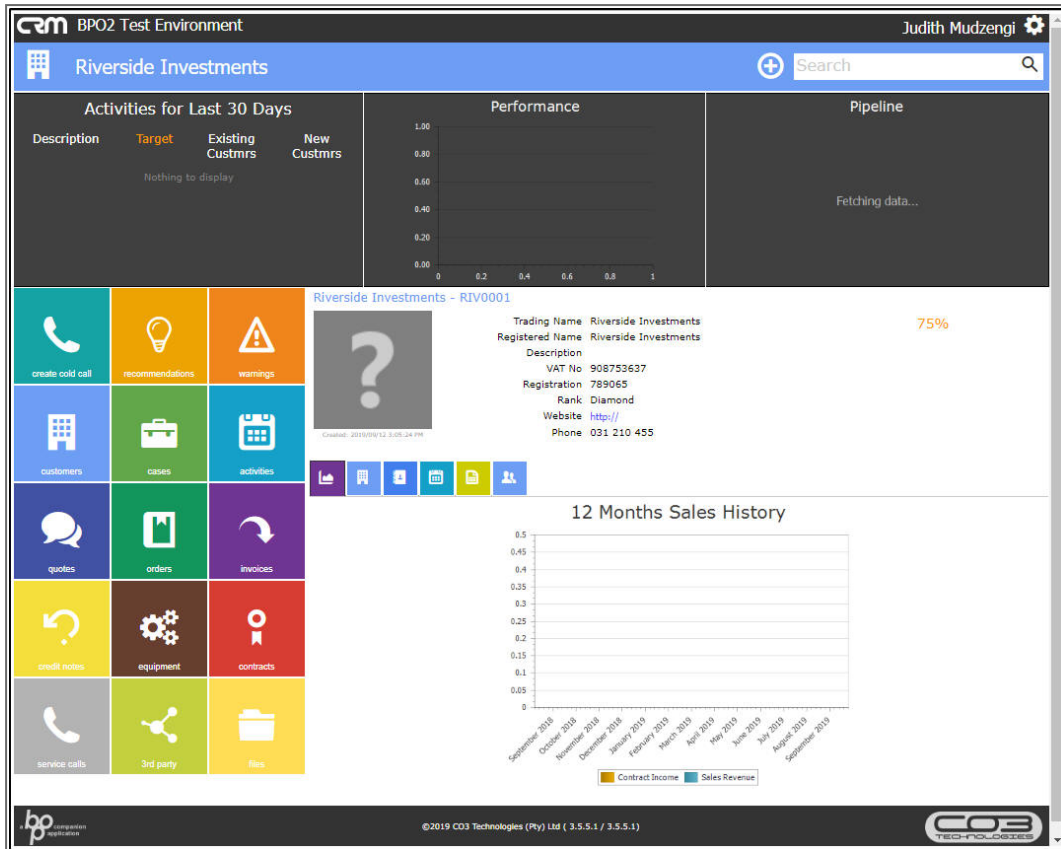
Reminder: Email SMS 30 minutes before scheduled start

Submit Options

Show customer after save

1 →

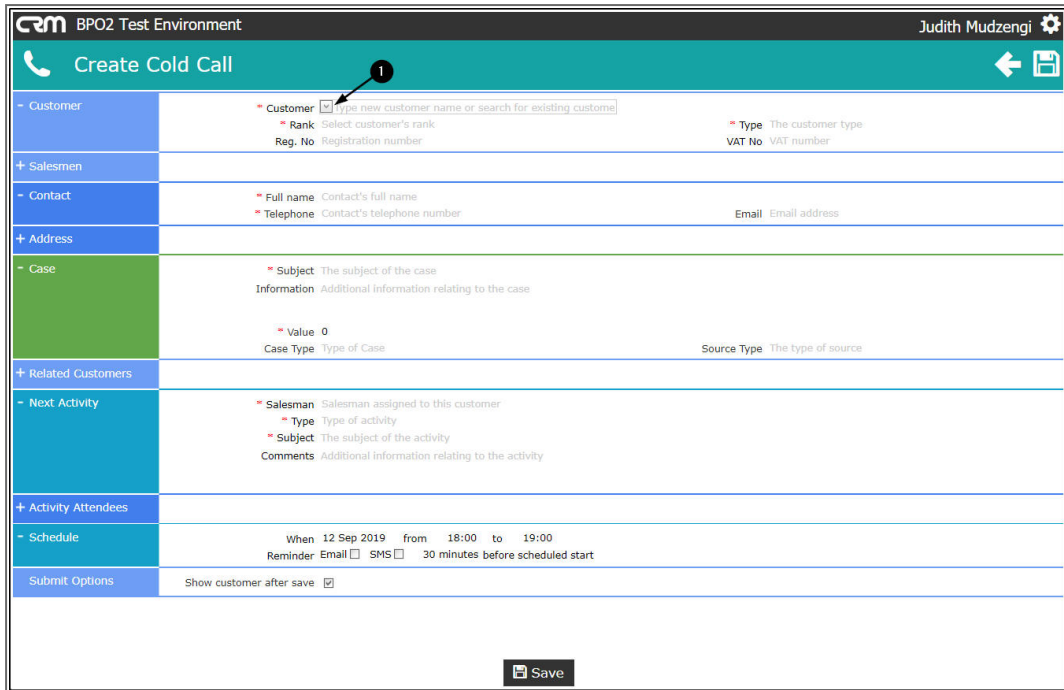
- The **Customer Dashboard** will be displayed.
- The newly added customer can be viewed in this screen.



CREATE COLD CALL FOR EXISTING CUSTOMER

Customer Section

- **Customer:**
 1. For an existing customer, either click on the **drop-down arrow** and select the relevant customer or



- **Customer:**
 1. type in the Customer Name,
 2. a customers list will pop up. As you type,the amount of customers in the list this will reduce. Select the relevant customer.

CRM BPO2 Test Environment Judith Mudzengi

Create Cold Call

Customer

* Customer: Hop
 * Rank: 71505978
 * Reg. No: 71506696

Code	Name	Registered Name	Trading Name	Status
71505978	Arthropyrreniaceae Flash	Arthropyrreniaceae Flash	Arthropyrreniaceae Flash	N
71506696	Cell Kypoplasty	Cell Kypoplasty	Cell Kypoplasty	N
71509577	Extended Arthropyrreniaceae	Extended Arthropyrreniaceae	Extended Arthropyrreniaceae	N
HOP0001	Hope Works	Hope Works	Hope Works	N
71505688	Kypoplasty Customiz	Kypoplasty Customiz	Kypoplasty Customiz	A
71502461	Kypoplasty Function	Kypoplasty Function	Kypoplasty Function	N
71509711	Kypoplasty IDX	Kypoplasty IDX	Kypoplasty IDX	N

* Full name: 71505688
 * Telephone: 71502461

Case

* Subject: The subject of the case
 Information: Additional information relating to the case
 * Value: 0
 Case Type: Type of Case Source Type: The type of source

Next Activity

* Salesman: Judith Mudzengi
 * Type: Type of activity
 * Subject: The subject of the activity
 Comments: Additional information relating to the activity

Schedule

When: 12 Sep 2019 from 18:00 to 19:00
 Reminder: Email SMS 30 minutes before scheduled start

Submit Options: Show customer after save

- **Rank:** This field will auto populated and cannot be edited.
- **Reg No:** This field will auto populated and cannot be edited.
- **Type:** This field will auto populated and cannot be edited.
- **VAT No:** This field will auto populated and cannot be edited.

CRM BPO2 Test Environment Judith Mudzengi

Create Cold Call

Customer

* Customer: Hope Works
 * Rank: Silver (60 days)
 * Reg. No: Registration number
 * Type: Retail
 * VAT No: VAT number

Contact

* Full name: Contact's full name
 * Telephone: Contact's telephone number
 Email: Email address

Case

* Subject: The subject of the case
 Information: Additional information relating to the case
 * Value: 0
 Case Type: Type of Case Source Type: The type of source

Next Activity

* Salesman: Judith Mudzengi
 * Type: Type of activity
 * Subject: The subject of the activity
 Comments: Additional information relating to the activity

Schedule

When: 13 Sep 2019 from 11:00 to 12:00
 Reminder: Email SMS 30 minutes before scheduled start

Submit Options: Show customer after save

Sales Section

- Previously selected salesmen will already be marked. You can unselect a salesman if applicable.
- Mark additional salesmen that will be linked to this customer if required. These marked salesmen will be available for selection if you are raising this cold call to assign to another salesman.

Contact Section

- **Full Name:** Click on the **drop-down arrow** and select the customer contact.
- **Telephone:** This field will auto populate when the customer contact is selected but can be edited if required.

- **Email Address:** This field will auto populate when the customer contact is selected can be edited if required.

Address Section

- You can either select an existing customer address or add a **new** customer address.
- For the purpose of this manual, an existing customer address will be used.
 - **Existing:** Click on the **drop-down arrow** and select an existing customer address.
 - **Address Line 1 and 2:** These fields will auto populate but can be edited if applicable.
 - **Suburb:** This field will auto populate but can be edited if applicable.

- **City:** This field will auto populate but can be edited if applicable.
- **Province / State:** This field will auto populate but can be edited if applicable.
- **Post Code:** This field will auto populate but can be edited if applicable.
- **Country:** This field will auto populate but can be edited if applicable.

Case Section

- **Subject:** Type in the subject of the case.
- **Information:** Type in additional information relating to the case if applicable.
- **Value:** Type in the estimated value of the case.

- **Case Type:** Click on the **drop-down arrow** and select the relevant case type.
- **Source Type:** Click on the **drop-down arrow** and select the relevant source type.

Related Customer Section

- You have the ability to link **Related Customers** . This enables you to invite contacts from various clients to an activity - such as a meeting or training session.
- If you don't need to link a **Related Customer** , you can move on to the **Activity section** .

- **Related Customers:**
 1. Click on the **drop-down arrow** and select the relevant customer from the list and
 2. click on the ' + ' button.

The screenshot shows the 'Create Cold Call' form in a CRM system. The form is divided into several sections:

- Salesmen:** A list of salesmen with checkboxes. The first column has a '+' icon.
- Contact:** Fields for Full name (John Smith), Telephone (031 123 4567), and Email (john@email.coza).
- Address:** Fields for Existing (26 Lavender Road), Address Line 1 (26 Lavender Road), Address Line 2 (New Town), Suburb (Forest Hills), City (Durban), Province/State (KZN), Post Code (1234), and Country (South Africa).
- Case:** Fields for Subject (Site Inspection), Information (Site Inspection), Value (100000), Case Type (Corporate), and Source Type (Cold Call).
- Related Customers:** A search bar with a '+' button and a dropdown arrow. A red circle '1' points to the dropdown arrow, and a red circle '2' points to the '+' button. Below the search bar, it says 'No data to display'.
- Next Activity:** Fields for Salesman (Judith Mudzengi), Type (Type of activity), Subject (The subject of the activity), and Comments (Additional information relating to the activity).
- Activity Attendees:** A section for adding attendees.
- Schedule:** Fields for When (13 Sep 2019), from (11:00), to (12:00), and Reminder (Email, SMS, 30 minutes before scheduled start).
- Submit Options:** A checkbox for 'Show customer after save'.

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

- **Related Customers:**
 3. Click on the **Delete** icon if you wish to remove a linked related customer.

CRM BPO2 Test Environment
Judith Mudzengi

📞 Create Cold Call
← 📄

Customer	* Customer Hope Works * Rank Silver (60 days) Reg. No. Registration number * Type Retail VAT No. VAT number																								
Salesmen	<table style="width: 100%; border: none;"> <tr> <td style="width: 33%; border: none;"><input checked="" type="checkbox"/> Abigail Milne</td> <td style="width: 33%; border: none;"><input type="checkbox"/> Chris Haynes</td> <td style="width: 33%; border: none;"><input checked="" type="checkbox"/> Judith Mudzengi</td> </tr> <tr> <td style="border: none;"><input type="checkbox"/> Adele Weeder</td> <td style="border: none;"><input type="checkbox"/> CO3 Admin</td> <td style="border: none;"><input type="checkbox"/> Kaashira Ninghin</td> </tr> <tr> <td style="border: none;"><input checked="" type="checkbox"/> Alex Spangenberg</td> <td style="border: none;"><input checked="" type="checkbox"/> Colin Holden</td> <td style="border: none;"><input type="checkbox"/> Kessia Maitland</td> </tr> <tr> <td style="border: none;"><input type="checkbox"/> Almeria Teacy</td> <td style="border: none;"><input type="checkbox"/> Dalene Pillay</td> <td style="border: none;"><input type="checkbox"/> Kim Engelbrecht</td> </tr> <tr> <td style="border: none;"><input type="checkbox"/> Andromache Joselevitch</td> <td style="border: none;"><input type="checkbox"/> Darryl Muller</td> <td style="border: none;"><input type="checkbox"/> Lucky Mawuye</td> </tr> <tr> <td style="border: none;"><input type="checkbox"/> Angie Roseborough</td> <td style="border: none;"><input type="checkbox"/> Debbie Lugar</td> <td style="border: none;"><input type="checkbox"/> Malory Allibon</td> </tr> <tr> <td style="border: none;"><input type="checkbox"/> Armando Reichelt</td> <td style="border: none;"><input type="checkbox"/> Derrick Weeder</td> <td style="border: none;"><input type="checkbox"/> Marc Ragsold</td> </tr> <tr> <td style="border: none;"><input type="checkbox"/> Arv Huelin</td> <td style="border: none;"><input type="checkbox"/> Edwell Msakiva</td> <td style="border: none;"><input type="checkbox"/> Marius Engelbrecht</td> </tr> </table>	<input checked="" type="checkbox"/> Abigail Milne	<input type="checkbox"/> Chris Haynes	<input checked="" type="checkbox"/> Judith Mudzengi	<input type="checkbox"/> Adele Weeder	<input type="checkbox"/> CO3 Admin	<input type="checkbox"/> Kaashira Ninghin	<input checked="" type="checkbox"/> Alex Spangenberg	<input checked="" type="checkbox"/> Colin Holden	<input type="checkbox"/> Kessia Maitland	<input type="checkbox"/> Almeria Teacy	<input type="checkbox"/> Dalene Pillay	<input type="checkbox"/> Kim Engelbrecht	<input type="checkbox"/> Andromache Joselevitch	<input type="checkbox"/> Darryl Muller	<input type="checkbox"/> Lucky Mawuye	<input type="checkbox"/> Angie Roseborough	<input type="checkbox"/> Debbie Lugar	<input type="checkbox"/> Malory Allibon	<input type="checkbox"/> Armando Reichelt	<input type="checkbox"/> Derrick Weeder	<input type="checkbox"/> Marc Ragsold	<input type="checkbox"/> Arv Huelin	<input type="checkbox"/> Edwell Msakiva	<input type="checkbox"/> Marius Engelbrecht
<input checked="" type="checkbox"/> Abigail Milne	<input type="checkbox"/> Chris Haynes	<input checked="" type="checkbox"/> Judith Mudzengi																							
<input type="checkbox"/> Adele Weeder	<input type="checkbox"/> CO3 Admin	<input type="checkbox"/> Kaashira Ninghin																							
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<input type="checkbox"/> Almeria Teacy	<input type="checkbox"/> Dalene Pillay	<input type="checkbox"/> Kim Engelbrecht																							
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<input type="checkbox"/> Armando Reichelt	<input type="checkbox"/> Derrick Weeder	<input type="checkbox"/> Marc Ragsold																							
<input type="checkbox"/> Arv Huelin	<input type="checkbox"/> Edwell Msakiva	<input type="checkbox"/> Marius Engelbrecht																							
Contact	* Full name John Smith * Telephone 031 123 4567 Email john@email.coza																								
Address	Existing 26 Lavender Road Address Line 1 26 Lavender Road Address Line 2 New Town Suburb Forest Hills City Durban Province/State KZN Post Code 1234 Country South Africa																								
Case	* Subject Site Inspection Information Site Inspection * Value 100000 Case Type Corporate Customer Source Type Cold Call																								
Related Customers	Related Customers JIRA Networked: 71505555 JIRA Networked - 71505555																								
Next Activity	* Salesman Judith Mudzengi * Type Type of activity * Subject The subject of the activity Comments Additional information relating to the activity																								
Activity Attendees																									
Schedule	When 13 Sep 2019 from 11:00 to 12:00 Reminder: Email <input type="checkbox"/> SMS <input type="checkbox"/> 30 minutes before scheduled start																								
Submit Options	Show customer after save <input checked="" type="checkbox"/>																								

Save

Next Activity Section

- **Salesmen:** You will be selected by default. You can assign this Customer, Case and Activity to another salesman, if you are raising this on their behalf.
 - To assign this case to another salesman, click on the **drop-down arrow** and select the relevant salesman.
 - **Note:** You can only assign the case to the salesmen selected in the **Salesmen section**.
- **Type:** Select the type of Activity, e.g. 'Call'.
- **Subject:** Type in the subject of the activity.

- **Comments:** Type in additional information relating to the activity.

The screenshot shows the 'Create Cold Call' form in a CRM system. The form is divided into several sections:

- Salesmen:** A list of salesmen with checkboxes. Judith Mudzengi is checked.
- Contact:** Fields for Full name (John Smith), Telephone (031 123 4567), and Email (john@email.co.za).
- Address:** Fields for Existing, Address Line 1 (26 Lavender Road), Address Line 2 (New Town), Suburb (Forest Hills), City (Durban), Province/State (KZN), Post Code (1234), and Country (South Africa).
- Case:** Fields for Subject (Site Inspection), Information (Site Inspection), Value (100000), Case Type (Corporate), and Source Type (Cold Call).
- Related Customers:** A section with a search bar and a 'No data to display' message.
- Next Activity:** A section with fields for Salesman (Judith Mudzengi), Type (Type of activity), Subject (The subject of the activity), and Comments (Additional information relating to the activity). This section is highlighted with a black box and an arrow.
- Activity Attendees:** A section for adding attendees.
- Schedule:** Fields for When (13 Sep 2019), from (11:00), to (12:00), and Reminder (Email, SMS, 30 minutes before scheduled start).
- Submit Options:** A checkbox for 'Show customer after save'.

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

Activity Attendees Section

- It is only necessary to link Activity Attendees if you want to send email invites to these people to join an activity - such as a meeting. The attendees can accept or reject this request. If they accept, this activity will display as an event on their calendar.
 1. The Salesman and Customer Contact will be linked as Activity Attendees by default (and cannot be removed).
 2. You can also link other employees, case customer contacts and related customer contacts. To do so, click on the **drop-down arrow** and select the relevant person from the list.
 3. Then click on the ' + ' button.

4. Tick the **Send Email Invites** check box if you wish to send email invites to the attendees.

- **Note:** The **Send Email Invites** option may be selected by default **depending on the BPOCRM configuration**.

The screenshot shows the 'Create Cold Call' form in the CRM BPO2 Test Environment. The form is divided into several sections:

- Customer:** * Customer: Hope Works, * Rank: Silver (60 days), * Type: Retail. Fields for Reg. No. and VAT No. are present.
- Salesmen:** A list of salesmen with checkboxes. Judith Mudzengi is checked.
- Contact:** * Full name: John Smith, * Telephone: 031 123 4567, Email: john@email.coza
- Address:** Existing: 26 Lavender Road, Address Line 1: 26 Lavender Road, Address Line 2: New Town, Suburb: Forest Hills, City: Durban, Province/State: KZN, Post Code: 1234, Country: South Africa.
- Case:** * Subject: Site Inspection, Information: Site Inspection, * Value: 100000, Case Type: Corporate Customer, Source Type: Cold Call.
- Related Customers:** Related Customers, No data to display.
- Next Activity:** * Salesman: Judith Mudzengi, * Type: Site Inspection, * Subject: Site Inspection, Comments: Site inspection at site 2.
- Activity Attendees:** Attendees list with a 'Send Email Invites' checkbox (circled 4) and a 'Delete' icon (circled 1). A note says 'Case contact and salesman are always made attendees'. A circled '3' points to the attendees list.
- Schedule:** When: 13 Sep 2019 from 11:00 to 12:00, Reminder: Email, SMS, 30 minutes before scheduled start.
- Submit Options:** Show customer after save: checked.

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

5. Click on the **Delete** icon if you wish to remove an attendee.

CRM BPO2 Test Environment
Judith Mudzengi

☎ ➔ 📄

☎ ➔ 📄

Customer

* Customer: Hope Works

* Rank: Silver (60 days)

Reg. No. Registration number

* Type: Retail

VAT No. VAT number

Salesmen

<input checked="" type="checkbox"/> Abigail Milne	<input type="checkbox"/> Chris Haynes	<input checked="" type="checkbox"/> Judith Mudzengi
<input type="checkbox"/> Adele Weeder	<input type="checkbox"/> CO3 Admin	<input type="checkbox"/> Kashmira Nirghin
<input checked="" type="checkbox"/> Alex Spangenberg	<input checked="" type="checkbox"/> Colin Holden	<input type="checkbox"/> Kessia Maitland
<input type="checkbox"/> Almeria Teacy	<input type="checkbox"/> Dalene Pillay	<input type="checkbox"/> Kim Engelbrecht
<input type="checkbox"/> Andromache Joselevitch	<input type="checkbox"/> Darryl Muller	<input type="checkbox"/> Lucky Mavuye
<input type="checkbox"/> Angie Roseborough	<input type="checkbox"/> Debbie Lugar	<input type="checkbox"/> Malory Allibon
<input type="checkbox"/> Armando Reichelt	<input type="checkbox"/> Derrick Weeder	<input type="checkbox"/> Marc Rapsold
<input type="checkbox"/> Arv Huelin	<input type="checkbox"/> Edwell Msakiva	<input type="checkbox"/> Marius Engelbrecht

Contact

* Full name: John Smith

* Telephone: 031 123 4567

Email: john@email.coza

Address

Existing: 26 Lavender Road

Address Line 1: 26 Lavender Road

Address Line 2: New Town

Suburb: Forest Hills

City: Durban

Province/State: KZN

Post Code: 1234

Country: South Africa

Case

* Subject: Site Inspection

Information: Site Inspection

* Value: 100000

Case Type: Corporate Customer

Source Type: Cold Call

Related Customers

Related Customers + Related Customers

No data to display

Next Activity

* Salesman: Judith Mudzengi

* Type: Site Inspection

* Subject: Site Inspection

Comments: Site inspection at site 2

Activity Attendees

Attendees + Abigail Milne

▲ Abigail Milne

5 ➔ 📄

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

Schedule

When: 13 Sep 2019 from 11:00 to 12:00

Reminder: Email SMS 30 minutes before scheduled start

Submit Options

Show customer after save

Save

Schedule Section

- **When:** This field will be auto populated. Click on the **drop-down arrow** and select the relevant date.
- **From:** This field will be auto populated. Use the **up and down arrows** to select the relevant time.
- **To:** This field will be auto populated. Use the **up and down arrows** to select the relevant time.
- **Reminder:** If you wish to send a reminder to your attendees, you can choose whether to send the reminder by **Email** or **SMS**.
 1. Tick the **Email** check box if you wish to send the reminder by email.

2. Tick the **SMS** check box if you wish to send the reminder by SMS.
3. '**Reminder Time** ': You can also choose when to send the reminder by clicking on the **drop-down arrow** and selecting the appropriate time period.
 - **Note:** Reminders will only work if your mobile number and email address have been configured in **BPO** .

CRM BPO2 Test Environment Judith Mudzengi

Create Cold Call

Customer
 * Customer: Hope Works
 * Rank: Silver (60 days)
 Reg. No: Registration number
 * Type: Retail
 VAT No: VAT number

Salesmen
 Abigail Mine
 Chris Haynes
 Judith Mudzengi
 Adele Weeder
 CO3 Admin
 Kashmiri Ninghin
 Alex Spangenberg
 Colin Holden
 Kessia Maitland
 Almeria Teacy
 Dalene Pillay
 Kim Engelbrecht
 Andromache Joselevitch
 Darryl Muller
 Lucky Mawuye
 Angie Roseborough
 Debbie Lugar
 Malory Allibon
 Armando Reichelt
 Derrick Weeder
 Marc Repsold
 Arv Huelin
 Edwell Msakva
 Marius Engelbrecht

Contact
 * Full name: John Smith
 * Telephone: 021 123 4567
 Email: john@email.coza

Address
 Existing: 26 Lavender Road
 Address Line 1: 26 Lavender Road
 Address Line 2: New Town
 Suburb: Forest Hills
 City: Durban
 Province/State: KZN
 Post Code: 1234
 Country: South Africa

Case
 * Subject: Site Inspection
 Information: Site Inspection
 * Value: 100000
 Case Type: Corporate Customer
 Source Type: Cold Call

Related Customers
 Related Customers + Related Customers
 No data to display

Next Activity
 * Salesman: Judith Mudzengi
 * Type: Site Inspection
 * Subject: Site Inspection
 Comments: Site inspection at site 2

Activity Attendees
 Attendees + Attendees
 Case contact and salesman are always made attendees
 Send Email Invites *note that invitations can only be sent to attendees with valid email addresses

Schedule
 When: 13 Sep 2019 from 11:00 to 12:00
 Reminder: Email SMS 30 minute before scheduled start

Submit Options
 Show customer after save

Save

Submit Option Section

- **Show customer after save:** This will be selected by default. Unselect if you do not wish to see the customer after saving.

CRM BPO2 Test Environment
Judith Mudzengi

📞 Create Cold Call
← 📄

Customer	* Customer: Hope Works * Rank: Silver (60 days) Reg. No. Registration number * Type: Retail VAT No. VAT number			
Salesmen	<table style="width: 100%; border: none;"> <tr> <td style="width: 33%; border: none;"> <input checked="" type="checkbox"/> Abigail Milne <input type="checkbox"/> Adele Weeder <input checked="" type="checkbox"/> Alex Spangenberg <input type="checkbox"/> Almeria Teacy <input type="checkbox"/> Andromache Joselevitch <input type="checkbox"/> Angie Roseborough <input type="checkbox"/> Armando Reichelt <input type="checkbox"/> Anu Huelin </td> <td style="width: 33%; border: none;"> <input type="checkbox"/> Chris Haynes <input type="checkbox"/> CO3 Admin <input checked="" type="checkbox"/> Colin Holden <input type="checkbox"/> Dalene Pillay <input type="checkbox"/> Darryl Muller <input type="checkbox"/> Debbie Lugar <input type="checkbox"/> Derrick Weeder <input type="checkbox"/> Edwell Msakiva </td> <td style="width: 33%; border: none;"> <input checked="" type="checkbox"/> Judith Mudzengi <input type="checkbox"/> Kashmira Ninghin <input type="checkbox"/> Kessia Maitland <input type="checkbox"/> Kim Engelbrecht <input type="checkbox"/> Lucky Mavuye <input type="checkbox"/> Malory Allibon <input type="checkbox"/> Marc Repsold <input type="checkbox"/> Marius Engelbrecht </td> </tr> </table>	<input checked="" type="checkbox"/> Abigail Milne <input type="checkbox"/> Adele Weeder <input checked="" type="checkbox"/> Alex Spangenberg <input type="checkbox"/> Almeria Teacy <input type="checkbox"/> Andromache Joselevitch <input type="checkbox"/> Angie Roseborough <input type="checkbox"/> Armando Reichelt <input type="checkbox"/> Anu Huelin	<input type="checkbox"/> Chris Haynes <input type="checkbox"/> CO3 Admin <input checked="" type="checkbox"/> Colin Holden <input type="checkbox"/> Dalene Pillay <input type="checkbox"/> Darryl Muller <input type="checkbox"/> Debbie Lugar <input type="checkbox"/> Derrick Weeder <input type="checkbox"/> Edwell Msakiva	<input checked="" type="checkbox"/> Judith Mudzengi <input type="checkbox"/> Kashmira Ninghin <input type="checkbox"/> Kessia Maitland <input type="checkbox"/> Kim Engelbrecht <input type="checkbox"/> Lucky Mavuye <input type="checkbox"/> Malory Allibon <input type="checkbox"/> Marc Repsold <input type="checkbox"/> Marius Engelbrecht
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Contact	* Full name: John Smith * Telephone: 031 123 4567 Email: john@email.coza			
Address	Existing: 26 Lavender Road Address Line 1: 26 Lavender Road Address Line 2: New Town Suburb: Forest Hills City: Durban Province/State: KZN Post Code: 1234 Country: South Africa			
Case	* Subject: Site Inspection Information: Site Inspection * Value: 100000 Case Type: Corporate Customer Source Type: Cold Call			
Related Customers	Related Customers Related Customers No data to display			
Next Activity	* Salesman: Judith Mudzengi * Type: Site inspection * Subject: Site Inspection Comments: Site inspection at site 2			
Activity Attendees	Attendees Attendees Case contact and salesman are always made attendees Send Email Invites <input type="checkbox"/> *note that invitations can only be sent to attendees with valid email addresses			
Schedule	When: 16 Sep 2019 from 11:00 to 12:00 Reminder: Email <input checked="" type="checkbox"/> SMS <input type="checkbox"/> 15 minutes before scheduled start			
Submit Options	Show customer after save: <input checked="" type="checkbox"/> ←			

Save

Save

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

CRM BPO2 Test Environment
Judith Mudzengi

☎ ➔ 📄
⬅

Customer	* Customer: Hope Works * Rank: Silver (60 days) Reg. No. Registration number * Type: Retail VAT No. VAT number			
Salesmen	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%; vertical-align: top;"> <input checked="" type="checkbox"/> Abigail Milne <input type="checkbox"/> Adele Weeder <input checked="" type="checkbox"/> Alex Spangenberg <input type="checkbox"/> Almeria Teacy <input type="checkbox"/> Andromache Joselevitch <input type="checkbox"/> Angie Roseborough <input type="checkbox"/> Armando Reichelt <input type="checkbox"/> Anu Huelin </td> <td style="width: 33%; vertical-align: top;"> <input type="checkbox"/> Chris Haynes <input type="checkbox"/> CO3 Admin <input checked="" type="checkbox"/> Colin Holden <input type="checkbox"/> Dalene Pillay <input type="checkbox"/> Darryl Muller <input type="checkbox"/> Debbie Lugar <input type="checkbox"/> Derrick Weeder <input type="checkbox"/> Edwell Msakiva </td> <td style="width: 33%; vertical-align: top;"> <input checked="" type="checkbox"/> Judith Mudzengi <input type="checkbox"/> Kashmira Ninghin <input type="checkbox"/> Kessia Maitland <input type="checkbox"/> Kim Engelbrecht <input type="checkbox"/> Lucky Mavuye <input type="checkbox"/> Malory Allibon <input type="checkbox"/> Marc Repsold <input type="checkbox"/> Marius Engelbrecht </td> </tr> </table>	<input checked="" type="checkbox"/> Abigail Milne <input type="checkbox"/> Adele Weeder <input checked="" type="checkbox"/> Alex Spangenberg <input type="checkbox"/> Almeria Teacy <input type="checkbox"/> Andromache Joselevitch <input type="checkbox"/> Angie Roseborough <input type="checkbox"/> Armando Reichelt <input type="checkbox"/> Anu Huelin	<input type="checkbox"/> Chris Haynes <input type="checkbox"/> CO3 Admin <input checked="" type="checkbox"/> Colin Holden <input type="checkbox"/> Dalene Pillay <input type="checkbox"/> Darryl Muller <input type="checkbox"/> Debbie Lugar <input type="checkbox"/> Derrick Weeder <input type="checkbox"/> Edwell Msakiva	<input checked="" type="checkbox"/> Judith Mudzengi <input type="checkbox"/> Kashmira Ninghin <input type="checkbox"/> Kessia Maitland <input type="checkbox"/> Kim Engelbrecht <input type="checkbox"/> Lucky Mavuye <input type="checkbox"/> Malory Allibon <input type="checkbox"/> Marc Repsold <input type="checkbox"/> Marius Engelbrecht
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Contact	* Full name: John Smith * Telephone: 031 123 4567 Email: john@email.coza			
Address	Existing: 26 Lavender Road Address Line 1: 26 Lavender Road Address Line 2: New Town Suburb: Forest Hills City: Durban Province/State: KZN Post Code: 1234 Country: South Africa			
Case	* Subject: Site Inspection Information: Site Inspection * Value: 100000 Case Type: Corporate Customer Source Type: Cold Call			
Related Customers	Related Customers + Related Customers No data to display			
Next Activity	* Salesman: Judith Mudzengi * Type: Site inspection * Subject: Site Inspection Comments: Site inspection at site 2			
Activity Attendees	Attendees + Attendees Case contact and salesman are always made attendees Send Email Invites <input type="checkbox"/> *note that invitations can only be sent to attendees with valid email addresses			
Schedule	When: 16 Sep 2019 from 11:00 to 12:00 Reminder: Email <input checked="" type="checkbox"/> SMS <input type="checkbox"/> 15 minutes before scheduled start			
Submit Options	Show customer after save <input checked="" type="checkbox"/>			

1 ➔ Save

- The **Customer Dashboard** will be displayed.
- The newly added customer can be viewed in this screen.

CRM BPO2 Test Environment
Judith Mudzengi

Hope Works
Search

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Nothing to display			

Performance

Pipeline

Fetching data...

create cold call

recommendations

warnings

customers

cases

activities

quotes

orders

invoices

credit notes

equipment

contracts

service calls

3rd party

files

Hope Works - HOP0001

Trading Name Hope Works

Registered Name Hope Works

Description

VAT No

Rank Silver

Website [http://](#)

Phone 031 123 4567

75%

Created: 2019/05/16 9:32:45 AM

12 Months Sales History

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