

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]:[portno]/BPOCRM/User.aspx

## ACCESS COLD CALLS FROM CUSTOMER DASHBOARD

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



### Cold Call

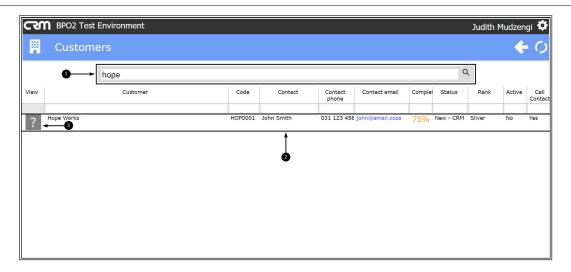
CCM BPO2 Test Environment		Judith Mudzengi 🌣
🔝 Dashboard		Search Q
vescription larget Existing Custmis Nothing to display	New Custmrs         0.50           0.60         0.40           0.40         0.20           0.00         0.92           0.00         0.92	Fetching data
17 Jan 2019     0       Create cold call     0       286     8       casimons     286       casimons     286       cases     280	7       Today       Recent       Calendar         Schedule Date         When: 10 Sep 2019, 15:00-16:00         When: 10 Sep 2019, 15:00-16:00         When: 10 Sep 2019, 15:00-16:00         Wheting - Hope Works: Meeting         Wheeting - Hope Works: Meeting         Where: 9 Sep 2019, 15:00-16:00         Where: 031 123 4567         Email: john@email.coza         Page 1 of 1 (2 tems) @ (1) 2 D A	Cell: Bus: 031 123 4567 Cell: Bus: 031 123 4567 Page size: 10 v
	©2019 CO3 Technologies (Pty) Ltd ( 3.5.5.1 / 3.5.5.1)	

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

	BPO2 Test Environment							Judith	Mudzer	igi 🌣
Ħ	Customers								÷	- O
	Type Customer name search filter here						٩			
View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
?	24 Hour HCCP	71509643	Another Person	345678		50%	New - CRM	Diamond	No	Yes
?	3Rd Generation Client-Server	71505527	Abigail Milne	031 234 567	abi@noname.com	75%	New - CRM		No	Yes
?	43305 Scalable	71505435				25%	Active		Yes	No
?	Adapter Holistic	71505360				25%	New - CRM		No	No
?	Adult Education Zope	71505302				25%	New - CRM		No	No
?	Advanced Feedmix	71505323				25%	New - CRM		No	No
?	Advanced Kimmel	71505324				25%	New - CRM		No	No
?	Aerospace Engineering Kubuntu	71505310				25%	New - CRM		No	No
?	Aimbu Yoveo	71505346				25%	New - CRM		No	No
?	Alliance IAR Embedded Workbench	71505341				25%	Active		Yes	No
age 1 of	29 (266 items) [ [1] 2 2 4 5 6 7 27 28 29 3 A								Page size	s: 10 🖂

- 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.

CRM BPO2	Test Environ	ment		Judith Mudzengi 🍄 î
🗰 Cust	omer Dash	board	Search	Q
create cold call	recommendations	A warnings	Trading Name Hope Works Registered Name Hope Works Description VAT No	75%
customers	cases	activities	Counter 2015 PL 2016 OVER Counter 2015 PL 2016 OVER Phone 031 123 4567	
quotes	orders	invoices	12 Months Sales History	
	equipment	Contracts	0.35 0.3 0.25 0.2 0.15	
service calls	Reference of the second	files	1.55 → → → → → → → → → →	
			@2019 C03 Technologies (Pty) Ltd ( 3.5.5.1 / 3.5.5.1)	

• 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.



CCM BPO2 Test B	nvironment		Judith Mudzengi 🌣
📞 Create C	old Call		🗲 🗎
Customer	<ul> <li>Customer Type new customer name or search for existing customer</li> <li>Rank: Select customer's rank</li> <li>Reg. No. Registration number</li> </ul>	" Type The customer type VAT No VAT number	
- Contact	<ul> <li>Full name. Contact's full name</li> <li>Telephone Contact's telephone number</li> </ul>	Email Email address	
+ Address			
- Case	* Subject The subject of the case Information Additional information relating to the case		
2	← Value 0 Case Type of Case	Source Type The type of source	
+ Related Customers			
- Next Activity	<ul> <li>Salesman .Salesman assigned to this customer</li> <li>Type Type of activity</li> <li>Subject The subject of the activity</li> <li>Comments :Additional information relating to the activity</li> </ul>		
+ Activity Attendees			
- Schedule	When 10 Sep 2019 from 18:00 to 19:00 Reminder Email SMS 30 minutes before scheduled start		
Submit Options	Show customer after save 🖉		
	🖹 Save		

### **ACCESS COLD CALLS FROM THE DASHBOARD**

- CRM BPO2 Test Environment Judith Mudzengi 🌣 Dashboard 🕀 Sear Q Performance Activities for Last 30 Days Existing New Custmrs Today Recent Calendar Status Schedule Date  $\mathbb{Q}$ ¥ A Phone call - Riverside Investments: Market New Products When: 13 Sep 2019, 11:00-12:00 Who: Joel Reeds, Riverside Investr Tel: 031 210 455 Email: joelreeds@email.com Cell: Bus: 031 210 455 Ë ш ÷ Page 1 of 1 (1 items) 《 < [1] > 》 All Page size: 10 🖂
- 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.

CCM BPO2 Test E	nvironment		Judith Mudzengi 🌣
📞 Create C	old Call		🔶 🗎
Customer	<ul> <li>Customer Type new customer name or search for existing customer</li> <li>Rank: Select customer's rank</li> <li>Reg. No: Registration number</li> </ul>	" Type The customer type VAT No VAT number	
- Contact + Address	<ul> <li>Full name Contact's full name</li> <li>Telephone Contact's telephone number</li> </ul>	Email Email address	
- Case	* Subject: The subject of the case Information: Additional information relating to the case		
2 + Related Customers	" Value 0 Case Type of Case	Source Type The type of source	
- Next Activity	<ul> <li>Salesman Salesman assigned to this customer</li> <li>Type Type of activity</li> <li>Subject The subject of the activity</li> <li>Comments Additional Information relating to the activity</li> </ul>		
+ Activity Attendees			
- Schedule	When 10 Sep 2019 from 18:00 to 19:00 Reminder Email SMS 30 minutes before scheduled start		
Submit Options	Show customer after save 🕑		
	🖺 Save		

### **CREATE COLD CALL FOR NEW CUSTOMER**

#### **Customer F rame**

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



	nvironment	Judith Mudzengi 🕻
📞 Create Co	old Call 🥠	← 🗄
- Customer + Salesmen - Contact + Address	Customer IR R     Kanne Repidered Name Treding Name Status     Forpe The Customer Type     Reg. No 7530149 384 Generation Napidit 384 Generation Alpoints N     Reg. No 7530149 384 Generation Napidit 384 Generation Alpoints N     Subscription 12547373 844 Generation Napidit 384 Generation Napidit N     TSIS01273 844 Generation National 384 Generation Name N     Subscription 12557373 844 Generation Name N     Subscription 1255731 844 Generation Subscription Name N     Telephone 7557739 444 Generation Subsfill 41 Constraints Subscription Name N     Telephone 7557739 444 Generation Subsfill 41 Constraints Subsfill 41 Cons	
- Case	* Subject: The subject of the case Information: Additional information relating to the case * Value 0 Case Type: The type of Case Source Type: The type of source	
+ Related Customers		
- Next Activity	<ul> <li>Salesman Salesman assigned to this customer</li> <li>Type Type of activity</li> <li>Subject. The subject of the activity</li> <li>Comments. Additional information relating to the activity</li> </ul>	
+ Activity Attendees		
- Schedule	When 11 Sep 2019 from 11:00 to 12:00 Reminder Email□ SMS□ 30 minutes before scheduled start	
	Show customer after 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.

CRM BPO2 Test E	nvironment	Judith Mudzengi 🌣
📞 Create C	old Call	🗲 🗎
- Customer	<ul> <li>Customer Riverside Investments</li> <li>Rank. Select customer's rank</li> <li>Reg. No Registration number</li> </ul>	► Type The customer type ► VAT No VAT number
+ Salesmen		
- Contact	<ul> <li>Full name Contact's full name</li> <li>Telephone Contact's telephone number</li> </ul>	Email Email address
+ 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
+ Related Customers		
- Next Activity	<ul> <li>Salesman Judith Mudzengl</li> <li>Type Type of activity</li> <li>Subject The subject of the activity</li> <li>Comments Additional information relating to the activity</li> </ul>	
+ 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	



### 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.

• Create Cold Call       • Customer Nverside Investments Sakes Dumond (S days) Reg. No 789065        • "Type Construction VIT No 90754537          • Sakesment          Adapt Weeder Adapt Weeder Address Source Type The type of source Yolkie Ø Cordet Address Yolkie Ø Case Yee Type Tone of adapt Yee Type of adapt Yee Yolkie Ø Case Yee Type of adapt Yee Yolkie Ø Yolkie Ø Case Yee Type of adapt Yee Yolkie Ø Yolkie Ø	CCM BPO2 Test	Environment		Judith Mudzengi
************************************	📞 Create (	Cold Call		<del>¢</del>
<ul> <li>Adde Wieder </li> <li>Ad</li></ul>	- Customer	* Rank Diamond (5 days)		
Image: Contract's telephone number       Email Email address         + Address       -         - Cose       * Subject The subject of the case Information Additional Information relating to the case is value 0 Case Type Type of Case       Source Type The type of source         + Related Customers       -         + Related Customers       -         - Next Activity       * Salesman Judith Nudsengi is Type Type of activity Comments Additional information relating to 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 © 20 minutes before scheduled start	- Salesmen	Adele Weeder Alex Spangenberg Ameria Taccy Andromache Joselevitch Angle Roseborough Armando Reichelt	CO3 Admin Colin Holden Dalene Pillay Darryl Muller Debbie Lugar	Kashmira Ninghin Kesia Maltland Kimi Engelovecht Lucky Mawuya Malory Allbon Mar Repsold
Cose Cose Cose Cose Cose Cose Cose Cose	- Contact		imber	Email Email address
Information Additional Information relating to the case       * Value 0 Case Type Type of Case     Source Type The type of source       * Related Customers     * Salesman Judith Muderopi * Type of activity * Type of activity Comments Additional information relating to the activity Comments Additional information relating to the activity       Activity Attendees       * Schedule     When 11 Sep 2019 from 12:00 to 13:00 Berninder Enall SMS 20 minutes before scheduled start	+ Address			
Case Type Type of Case     Source Type The type of source       F Related Customers     * Salesman Judith Mudzengi       * Next Activity     * Salesman Judith Mudzengi       * Subject The subject of the activity     * Subject of the activity       * Subject The subject of the activity     Comments Addational information relating to the activity       * Activity Attendees     ************************************	• Case			
Next Activity     Salesman Judith Mudzengi     Type Type of activity     Subject The subject of the 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				Source Type The type of source
* Type Type of activity     * Subject The subject of the activity     * Subject The subject of the activity     Comments Additional information nalating to the activity     Comments Additional information nalating to the activity     Schedule     When 11 Sep 2019 from 12:00 to 13:00     Reminder Email _ SMS _ 30 minutes before scheduled start	Related Customers			
- Schedule Whan 11 Sep 2019 from 12:00 to 13:00 Reminder Email SMS 20 minutes before scheduled start	• Next Activity	<ul> <li>Type Type of activity</li> <li>Subject The subject of the activity</li> </ul>		
Reminder Email SMS 30 minutes before scheduled start	+ Activity Attendees			
	- Schedule			
Submit Options Show customer after save V	Submit Options	Show customer after save 🕑		
			🗎 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.



CRM BPO2 Test B	CM BPO2 Test Environment Judith Mudzengi 🌣					
📞 Create C	old Call		🗲 🗎			
- Customer	<ul> <li>Customer Riverside Investments</li> <li>* Rank Diamond (5 days)</li> <li>Reg. No 789065</li> </ul>	<sup>∞</sup> Type Construction VAT No 908754637	*			
- Salesmen	🗹 Almeria Teacy 🗌 Dalen	dmin Rahmira Mirghin Holden Rassia Maitand e Pillay Clim Engelbrecht I Muller Lucky Mawuye e Lugar Malory Allicon	•			
- Contact	<ul> <li>Full name Contact's full name</li> <li>Telephone Contact's telephone number</li> </ul>	Email Email address	←			
+ Address						
- Case	<ul> <li>Subject: The subject of the case Information Additional information relating to the case</li> <li>value 0</li> <li>Case Type Type of Case</li> </ul>	Source Type The type of source				
+ Related Customers	Савенуре туре о Саве	Source type the type of source.				
- Next Activity	<ul> <li>Salesman Judith Mudzangi</li> <li>"Type Type of activity</li> <li>Subject: The subject of the activity</li> <li>Comments: Additional information relating to the activity</li> </ul>					
+ Activity Attendees						
- Schedule	When 12 Sep 2019 from 11:00 to 12:00 Reminder Email SMS 30 minutes before schedu		•			

#### **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.



CTM BPO2 Test E	Environment				Judith Mudzengi 🌣
📞 Create C	old Call				🔶 🗎
- Customer		Riverside Investments Diamond (5 days) 789065		* Type Construction VAT No 908754637	
- Salesmen	Abigail Milne     Adele Weeder     Alex Spangenberg     Almeria Teacy     Andromache Joselevitch     Angie Roseborough     Armando Reichelt     Arv Huelin		Chris Haynes CO3 Admin Colin Holden Dalene Pillay Darryl Muller Debbie Lugar Derrick Weeder Edwell Msakwa	Y Judith Mudzengi     Kashmira Nirghin     Kesia Malitand     Kim Engelbracht     Lucky Mawuye     Malory Allibon     Marc Rapsold     Marcus Engelbracht	
- Contact	* Full name * Telephone			Email joelreeds@email.com	
- Address	Address Line 1 Address Line 2 Suburb City Province/State Post Code	Address Line 2 Suburb Gity Province/State	-		
- Case		The subject of the case Additional information relating to the ca	se		
	* Value Case Type	0 Type of Case		Source Type The type of source	
+ Related Customers					
- Next Activity	* Type * Subject	Judith Mudzengi Type of activity The subject of the activity Additional information relating to the ac	tivity		
+ Activity Attendees					
- Schedule		12 Sep 2019 from 11:00 to Email SMS 30 minutes before			
Submit Options	Show customer after save	V			
			🖹 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.



CTM BPO2 Test I	Environment			Judith Mudzengi 🌣
📞 Create C	Cold Call			🔶 🖹
- Customer	* Customer Riverside Investments * Rank Diamond (5 days) Reg. No 789065		Type Construction VAT No 908754637	
- Salesmen	Abigall Mifne     Adde Weeder     Adde Sweeder     Adde Sweeder     Adde Sweeder     Adde Sweeder     Adde Assessment     Andromache Zestelwitch     Angie Resident     Artyle Resident     Artyle Resident	Chris Haynes CO3 Admin Colin Holden Dalens Pillay Daryn Muller Debble Lugar Derrick Weeder Edwill Maalava	Judith Mudsengi     Kashnina Kinghin     Kashnina Kinghin     Kona Bushandh     Ludoy Maviyas     Malory Allibon     Marc Repsold     Marcashnekh	Ţ
- Contact	* Full name Joel Reeds * Telephone 031 210 455		Email joelreeds@email.com	
- Address	Existing New Address Une 1 12 Selby Court Address Une 2 7 Collitors Rd Suburb Gillits City Durban Province/State K2N Post Code 4000 Country RSA			
- Case	<ul> <li>Subject The subject of the case Information Additional information relating to the case</li> <li>Value 0 Case Type Type of Case</li> </ul>	se l	Source Type The type of source	←
+ Related Customers				
- Next Activity	<ul> <li>Salesman Judith Mudzengi</li> <li>Type Type of activity</li> <li>Subject The subject of the activity</li> <li>Comments: Additional information relating to the act</li> </ul>	svity		
+ Activity Attendees				
- Schedule	When 11 Sep 2019 from 12:00 to Reminder Email SMS 20 minutes before :	13:00 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 <u>not</u> 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.



CCM BPO2 Test	Environment	Judith Mudzengi 🌣
📞 Create (	Cold Call	🔶 🖪
- Customer	* Customer Riverside Investments * Rank. Diamond (5 days) Reg. No. 789065 VAT No. 908734637	î
- Salesmen	Ø Abigall Milne     Chris Haynes     Ø Judith Mudzengi       Adale Weadar     Ø G3 Admin     Kashmin Mighin       Adate Weadar     Ø G3 Admin     Kashmin Mighin       Adate Vageneherg     Calin Holden     Kassia Maltand       Andromache Joselevitch     Dalene Pillay     Kim Engebrecht       Andromache Joselevitch     Darryl Muller     Ludy Mavuye       Andromache Joselevitch     Darryl Muller     Malory Allibon       Armando Reichtit     Detrick Weeder     Marc Repebler       Arvin Huelin     Edrivell Makrua     Marine Engelbrecht	
- Contact	<ul> <li>Full name Joel Reeds</li> <li>Telephone 031 210 455</li> <li>Email joelreeds@email.com</li> </ul>	
- Address	Existing New Address Line 1 12 Selby Court Address Line 2 7 Colinton Rd Suburb Gillits City Durban Province/Statk 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 😯 🗹 gradied 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**

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



CCM BPO2 Test E	Environment				Judith Mudzengi 🔅
📞 Create C	old Call				🔶 🗎
- Customer		Riverside Investments Diamond (5 days) 789065		* Type Construction VAT No 908754637	
- Salesmen	Abigail Milne     Adele Weeder     Alex Spangenberg     Almeria Teacy     Andromache Joselevitch     Angle Roseborough     Armando Reichelt     Angu Unalin	Chi Coi Dai Dai Deb	is Haynes 3 Admin in Holden ene Pillay Yryl Muller bible Lugar rick Waeder ad Mankum	Judith Mudzengi     Kashmira Nirghin     Kessa Maitland     Kim Engelsnecht     Lucky Mavuye     Malory Allbon     Marc Repaold     Morise Engelsnecht	·
- Contact	* Full name * Telephone			Email joelreeds@email.com	
- Address	Existing Address Line 1 Address Line 2 Suburb City Province/State Post Code Country	12 Selby Court 7 Colinton Rd Gillits Durban KZN 4000			
- Case		Market New Products Market New Products 200000			
- Related Customers		New Customer O Hope Works: HOP0001 Ħ Hope Works - HOP0001		Source Type Referral	3-→□
- Next Activity	* Type * Subject	Judith Mudzengi Type of activity The subject of the activity Additional information relating to the activity			<u> </u>
+ Activity Attendees					
- Schedule		11 Sep 2019 from 16:00 to 17:00 Email SMS 30 minutes before sched			
Submit Options	Show customer after save	2			
		8	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.

CCM BPO2 Test E	nvironment			Judith Mudzengi 🌣
📞 Create C	old Call			🔶 🗎
- Customer		Riverside Investments Diamond (5 days) 789065	* Type Construction VAT No 908754637	
- Salesmen	Abigail Milne     Adele Weeder     Alex Spangenberg     Almeria Teacy     Andromache Joselevitch     Angie Roseborough     Arrundo Reichelt     Arv Huelin	Chris Haynes COS Admin Colin Holden Dalene Pillay Darryl Muller Debbie Lugar Edwell Maskva	Judith Mudzengi     Kashmira Nirghin     Kasia Matiland     Kim Engelbracht     Lucky Mawuye     Malory Allibon     Marc Repsold     Marius Engelbracht	Ţ
- Contact	* Full name * Telephone	Joel Reeds 031 210 455	Email joelreeds@email.com	
- Address	Existing Address Line 1 Address Line 2 Suburb City Province/State Post Code Country	12 Salby Court 7 Colinton Rd Gillts Durban KZN 4000		
- Case	Information * Value			
- Related Customers		New Customer O Hope Works: HOP0001 Hope Works - HOP0001	Source Type Referral	
- Next Activity	* Type * Subject	Judith Mudzeng) Type of activity The subject of the activity Additional information relating to the activity	<b>←</b>	
+ Activity Attendees				
- Schedule		12 Sep 2019 from 11:00 to 12:00 Email SMS 30 minutes before scheduled start		
Submit Options	Show customer after save	V		
		🖹 Save		

### **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 ).

CCM BPO2 Test I	Environment				Judith Mudzengi 🌻
📞 Create C	Cold Call				🔶 🗎
- Customer	* Rank	Riverside Investments Diamond (5 days) 789065		* Type Construction VAT No 908754637	
- Salesmen	<ul> <li>Abigail Milne</li> <li>Adele Weeder</li> <li>Alex Spangenberg</li> <li>Almeria Teacy</li> <li>Andremache Joselevitch</li> <li>Angie Roseborough</li> <li>Armando Reichelt</li> <li>Arv Huelin</li> </ul>		Chris Haynes 9 C03 Admin Colin Holdan Dalene Billay Darryl Muller Debite Lugar Debite Lugar Berkell Maskva	Judith Muddengi     Kashnira Nirghin     Kashnira Nirghin     Kasisan     Kasisan     Lucky Manuya     Mater Apasold     Marc Apasold     Marc Benaltextt	• •
- Contact	* Full name * Telephone	Joel Reeds 031 210 455		Email joelreeds@email.com	
- Address	Address Line 2 Suburb	12 Selby Court 7 Colinton Rd Gillits Durban KZN 4000			
- Case		Market New Products Market New Products			
		200000 New Customer		Source Type Referral	
- Related Customers	Related Customers	O Hope Works; HOP0001			ti
- Next Activity	* Type * Subject	Judith Mudzengi Phone call Market New Products Market New Products			
- Activity Attendees	Attendees 3 Send Email Invites		Case contact and sale	sman are always made attendees -	
- Schedule	When	12 Sep 2019 from 11:00 Email SMS 30 minutes	to 12:00		
Submit Options	Show customer after save	V			
			B Save		

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



CCM BPO2 Test	Environment				Judith Mudzengi 🌻
📞 Create (	Cold Call				🔶 🗎
- Customer	* Customer Riversic * Rank Diamon Reg. No 789065	d (5 days)		* Type Construction VAT No 908753637	Î
- Salesmen	Abigail Milne     Adele Weeder     Ades Spanganberg     Almaria Tascy     Andromache Joselevitch     Angle Roseborough     Armando Raichelt     Arv Neelin		Chris Haynes Ø C03 Admin Colin Holden Dalene Pillay Darryl Muller Debble Lugar Derrick Weeder Edvell Maskva	Judich Mudzengi     Kašhmira Kirghin     Kašhmira Kirghin     Koste Brogbindit     Kutove     Kutove     Lucky Mavuve     Malor Albon     Mark Repseld     Marius Enablrecht	
- Contact	* Full name Joel Rei * Telephone 031 210			Email joelreeds@email.com	
- Address	Existing New Address Line 1 12 Selb Address Line 2 7 Colint Suburb Gillts City Durban Province/State KZN Post Code 4000 County RSA				
- Case	* Subject Market Information Market	New Products			
	* Value 200000 Case Type New Cu			Source Type Referral	
- Related Customers	Related Customers 😋 Hop 🛚 Hop	e Works: HOP0001 e Works - HOP0001			Ü
- Next Activity	* Salesman Judith I * Type Phone * Subject Market Comments Market	call New Products			
- Activity Attendees	1 John Page 1 d	ohn Smith; Hope Works a Smith f 1 (1 items) ( [1] ) (1) te that invitations can only b	e sent to attendees with valid email address	85	5 → 🕅
- Schedule		2019 from 13:00 to SMS 30 minutes be			
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.

CCM BPO2 Test	Environment				Judith Mudzengi 🌣
📞 Create (	Cold Call				🔶 🗎
- Customer	* Rank	Riverside Investments Diamond (5 days) 789065		* Type Construction VAT No 908753637	
- Salesmen	Abigail Milne     Adele Weeder     Alex Spangenberg     Almeria Teacy     Andromache Joselevitch     Angie Roseborough     Armado Reicheit     Arv Huelin		Chris Haynes P C03 Admin Colin Holden Dalene Pillay Darry Muller Debble Lugar Debrik Wieder Edwell Maskva	Judith Mudzengi     Kashmira Nirghin     Kasis Maltand     Kim Engelbrecht     Lucky Mawuye     Malory Allibon     Marcy Repold     Marcus Engelbrecht	ĺ
- Contact	* Full name * Telephone	Joel Reeds 031 210 455		Email joelreeds@email.com	
- Address	Address Line 2 Suburb	12 Selby Court 7 Colinton Rd Gillits Durban KZN 4000			
- Case	Information	Market New Products Market New Products 200000			
		New Customer		Source Type Referral	
- Related Customers	Related Customers	O Hope Works; HOP0001 ■ Hope Works - HOP0001			ti
- Next Activity	* Type * Subject	Judith Mudzengi Phone call Market New Products Market New Products			
- Activity Attendees		<ul> <li>John Smith: Hope Works</li> <li>John Smith</li> <li>Page 1 of 1 (1 items) &lt; [1] and</li> <li>*note that invitations can only be</li> </ul>	sent to attendees with valid email addresse	15	Page size: 10 🐷
- Schedule	When	12 Sep 2019 from 11:00 to Email SMS 20 minute befor	12:00		
Submit Options	Show customer after save				
		00	🖹 Save		

### **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.



CCM BPO2 Test	Environment			Judith Mudzengi 🌣
📞 Create (	Cold Call			🔶 🗎
- Customer	<sup>®</sup> Customer Riverside Investments <sup>®</sup> Rank <sup>™</sup> Diamond (5 days) Reg. No 789065		* Type Construction VAT No 908753637	
- Salesmen	Addgrift Ming     Adds     Addromache Josebrough     Amrando Reichelt     Ary Huelin	Chris Haynes CO3 Admin Colin Holden Dalene Pillay Daryi Muller Debbie Lugar Derrick Weeder Edwell Makivna	Judith Mudangi Kakamira Binjahin Kasila Matand Kim Engalbrecht Lucky Maruye Malory Allibon Mare Repaid Mare Repaid	
- Contact	* Full name Joel Reeds * Telephone 031 210 455		Email joelreeds@email.com	
- Address	Existing New Address Une 1: 12 Selby Court Address Line 2: 7 Collator Rd Suburb Gillits City Durban Province/State K2N 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 関 Hope Works - HOP0001			莭
- Next Activity	<ul> <li>Salesman Judith Mudzengi</li> <li>Type Phone call</li> <li>Subject Market New Products Comments Market New Products</li> </ul>			
- Activity Attendees	Attendees O John Smithi Hope Works John Smith Page 1 of 1 (1 kama) (1) om			Page size: 10 💌
- Schedule	Send Email Invites 🗌 *note that invitations can only When 13 Sep 2019 from 11:00	to 12:00	35	
Submit Options	Reminder Email 🗹 SMS 🗌 30 minutes b Show customer after save 🕼 🗲	efore scheduled start		
		🖹 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	Ĩ	* Type Construction VAT No 908753637	ĺ
- Salesmen	Abigail Mine     Abigail Mine     Adus Veedenro     Andus Yeedenro     Andromache Jossevich     Andromache Jossevich     Arnando Reichelt     Arv Houlin	Chris Haynes Cola Holden Cola Holden Darry Moller Debbie Lugar Christik Weeder Edwell Maskva	Judith Mudzengi     Kashmira Yinghin     Kashmira Yinghin     Kim Engelsvecht     Lucky Maruye     Malory Allibon     Marc Repoid     Marc Repoid	ĺ
- 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 Gillat City Durban Province/State XZN 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 関 Hope Works - HOP0001			(iii)
- Next Activity	<ul> <li>Salesman Judith Mudzengi</li> <li>Type Phone call</li> <li>Subject Market New Products Comments Market New Products</li> </ul>			
<ul> <li>Activity Attendees</li> </ul>	Attendees 🛟 John Smith; Hope W L John Smith Page I of 1 (1 kens) (c [1] Send Email Invites 🗆 *note that invitations c		·	Page size: 10 🔽
- Schedule	When 13 Sep 2019 from 1 Reminder Email	1:00 to 12:00 nutes before scheduled start		
Submit Options	Show customer after save 🕑			
		1> 🖻 Save		

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



### Cold Call

CRM BPO2	2 Test Enviror	nment		Judith Mudzengi 🖁	¢ ^
📕 Rive	rside Inves	stments		🕀 Search C	ર
Acti	ivities for La	ast 30 Days	Performance	Pipeline	
Action Description	Target Nothing to c		0.40 0.40 0.40 0.20 0.00 0.02 0.4 0.6 0.8 1	Fetching data	
create cold call	recommendations	Rivers warnings	de Investments - RIV0001 Trading Name Riverside Investments Registered Name Riverside Investments Description VAT No 908753637 Registration 789065	75%	
customers	cases	activities	Rank Diamond Website http:// Phone 031 210 455		
Quotes	orders	invoices	12 Months Sales	s History	
Scredit notes	equipment	<b>P</b> contracts	83 025 82 0.15 6.1		
Service calls	K 3rd party	nes -	0.05 0 0 0 0 0 0 0 0 0 0 0 0 0	4	
			©2019 CO3 Technologies (Pty) Ltd ( 3.5.5.1 / 3.5.5.1)		•

### CREATE COLD CALL FOR EXISTING CUSTOMER

### **Customer Section**

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



CCM BPO2 Test E	invironment		Judith Mudzengi 🌣
📞 Create C	old Call		🔶 🗎
- Customer	Customer Dype new customer name or search for existing custome     Rank. Select customer's rank     Reg. No. Registration number	* Type The customer type VAT No VAT number	
+ Salesmen			
- Contact	<ul> <li>Full name Contact's full name</li> <li>Telephone Contact's telephone number</li> </ul>	Email Email address	
+ Address			
- Case	* Subject The subject of the case Information Additional information relating to the case		
	" Value 0 Case Type of Case	Source Type The type of source	
+ Related Customers			
- 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		
+ Activity Attendees			
- 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 🕑		
	🗎 Save		

#### • Customer:

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



Customer       Image: Customer Hop:         * Rank       * Customer Hop:         * Rank       * Solesmen         Contact       * Full name         * Telephone       * Solesmen         Contact       * Full name         * Subject of the case       Kryphoglasty Customizet Kryphoglasty C	CRM BPO2 Test	Environment							Judith Mudzengi 🕏
image: state in the state	Create (	Cold Call	0						🔶 🗄
Salesmen       Image No. 200778 Classifysipher and a thispyresized is that attropyresized is that it is a thispyresized is the image of the image o	- Customer	* Customer	Нор						
Salesman       Trigging       Trigging <thtrigging< th="">       Trigging       <tht< th=""><th></th><th>* Rank</th><th>Code</th><th>Name</th><th>Registered Name</th><th>Trading Name</th><th>Status</th><th>ner type</th><th></th></tht<></thtrigging<>		* Rank	Code	Name	Registered Name	Trading Name	Status	ner type	
Salesmen       1256696       Cell kynbiolasty Totsforded Athlogyneis Contact       Cell kynbiolasty Notesided Athlogyneis Contact ** Full name 2558953       Kynbiolasty Nynbiolasty Function Nynbiolasty Function Nynbiolasty Nynbiol		Reg. No						.▲ er	
Contact       ** Full mane       1000001       10000001       1000001<								-	
Contact       ** Full name       1355568       type/pairstry function       Kyphoplatry function       Kyphoplatry function       K	F Salesmen							-   ←	
Address       135244       typebolaty Function       Kyphoplaty Function       N       Image: Control of Section 1000 (Section 1000) (Section 10000) (Section 1000) (Section 10000) (Section 1000) (Sect	Contact							-	
Address       Issortial       Kyshoplakty IDX       Kyshoplakty IDX       Kyshoplakty IDX       N       Image: Constraint of the case of	Contact							-	
Address		* Telephone	71502701					ress	
Information Additional Information relating to the case   • Value 0   Case Type The type of source   Related Customers   Next Activity   * Salesman Judith Mudzengi   * Type Type of activity   * Subject The subject of the activi	+ Address		/1505/11	Kypilopiasty IDA	Kyphopiasty IDX	Kyphopiascy tox	N		
• Value 0       Source Type The type of source         Related Customers          Next Activity       • Salesman Judith Mudzengi         • Type Type of activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity	Case	* Subject	The subject of th	ie case					
• Value 0       Source Type The type of source         Related Customers          Next Activity       • Salesman Judith Mudzengi         • Type Type of activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity         • Subject The subject of the activity       • Subject of the activity		Information							
Case Type Type of Case       Source Type The type of source         Related Customers          Next Activity       "Salesman Judit Mudzengi "Type of activity" "Subject fre subject of the activity Comments Additional information relating to the activity Comments Additional Information relating to the activity         Activity Attendees          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 I			0						
Related Customers       Next Activity       * Salesman Judith Mudzengi       * Type Type of activity       * Subject of the activity       * Subject of the activity       * Subject of the activity       Comments Additional Information relating to the activity       Activity Attendees       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 I						-			
Next Activity       * Salesman Judith Mudzengi * Type Type of activity * Subject of the activity Comments Additional information relating to the activity         Activity Attendees		Case Type	type or case			5	source Type The t	type of source	
* Type Type of activity         * Subject of the activity         * Subject of the activity         Comments Additional information relating to the activity         Activity Attendees         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 III									
* Subject The subject of the activity Comments Additional Information relating to the activity       Activity Attendees       Schedule       When 12 Sep 2019 from 18:00 to 19:00 Reinider Email SMS 30 minutes before scheduled start       Submit Options     Show customer after save 🖉	• Next Activity	* Salesman	Judith Mudzengi						
Comments Additional information relating to the activity       Activity Attendees       Schedule       When 12 Sep 2019 from 18:00 to 19:00 Reminder Email SMS 30 minutes before scheduled start       Submit Options		* Туре	Type of activity						
Activity Attendees       Schedule       When 12 Sep 2019 from 18:00 to 19:00 Reminder Email       Submit Options       Show customer after save		* Subject	The subject of th	ne 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 Ø		Comments		nation relating to the a	ctivity				
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 Ø									
Reminder Email SMS 30 minutes before scheduled start       Submit Options	- Activity Attendees								
Reminder Email SMS 30 minutes before scheduled start       Submit Options	- Schedule	When	12 Son 2010	from 18:00 to	10:00				
Submit Options Show customer after save 🗵	CARACTER								
		Reminder		50 minutes perore	e scheduled start				
		Show customer after save	V						
🖨 Save									
🛱 Save									
🛱 Save									
🗄 Save									
🖹 Save				_					
					🗄 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.

CTM BPO2 Test I	Environment		Judith Mudzengi 🌣
📞 Create C	Cold Call		÷ 🗎
- Customer	<ul> <li>Customer Hope Works</li> <li>* Rank. Silver (60 days)</li> <li>Reg. No Registration number</li> </ul>	* Type Retail VAT No VAT number	←
+ Salesmen			
- Contact	<ul> <li>Full name Contact's full name</li> <li>Telephone Contact's telephone number</li> </ul>	Email Email address	
+ Address			
- Case	• Subject The subject of the case Information Additional information relating to the case		
	■ Value 0 Case Type of Case	Source Type The type of source	
+ Related Customers			
- Next Activity	<ul> <li>Salesman Judith Mudzengi         <ul> <li>Type Type of activity</li> <li>Subject The subject of the activity</li> </ul>         Subject The subject of the activity</li> </ul> <li>Comments Additional information relating to the activity</li>		
+ Activity Attendees			
- 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		

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### **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.

CCM BPO2 Test I	Environment			Judith Mudzengi 🌣
📞 Create C	old Call			🔶 🗎
- Customer	* Customer Hope Works * Rank Silver (60 days) Reg. No Registration numb	er	* Type Retail VAT No VAT number	
- Salesmen	Abigail Milne     Adele Weeder     Alex Spagneherg     Almeria Teacy     Andromach Joselevitch     Angle Roseborough     Armando Reichelt     Art Huelin	Chris Haynes Co3 Admin Coin Holden Darryf Muller Debbie Lugar Debbie Lugar Edwall Maakva	Judith Mudzengi     Kashmira Nirghin     Kesisi Maitland     Kim Engelbrecht     Lucky Manuya     Maiory Allibon     Marc Repool     Marc Repool     Markus Engelbrecht	← .
- Contact	* Full name: Contact's full nam * Telephone: Contact's telephon		Email Email address	
+ Address				
- Case	Subject The subject of the Information Additional informa			
	* 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 Comments Additional informa			
+ Activity Attendees				
- Schedule	When 13 Sep 2019 fr Reminder Email SMS	om 11:00 to 12:00 30 minutes before scheduled start		
Submit Options	Show customer after save 🕑			
		🖹 Save		

### **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.

C CIII Droz Test I	Environment		2. 	Judith Mudzengi 🌣
📞 Create C	old Call			🔶 🗎
- Customer	* Customer Hope Works * Rank Silver (60 days) Reg. No. Registration number		* Type Retail VAT No VAT number	
- Salesmen	Abigail Milne     Adele Weeder     Adele Meeder     Alex Spangenberg     Andromache Joselevitch     Angie Roseborough     Armando Reicheit     Ary Huein	Chris Haynes CO3 Admin CO3 Admin Dalene Pilay Dalene Pilay Debbie Lugar Debbie Lugar Detrick Weeder	Judith Mudzengi     Kashnira Nirghin     Kesis Maltand     Kim Engelsreaht     Lucky Manuye     Malory Allibon     Marc Repool     Marc Repool	
- Contact	* Full name Contact's full name * Telephone Contact's telephone num!	ber	Email Email address	←
+ Address				
- Case	* Subject The subject of the case Information Additional Information rel	ating to the case		
	* Value 0			
+ Related Customers	Case Type Type of Case		Source Type: The type of source	
- Next Activity	<ul> <li>Salesman Judith Mudzengi</li> <li>Type of activity</li> <li>Subject The subject of the activity</li> <li>Comments Additional information rel</li> </ul>			
+ Activity Attendees				
- Schedule	When 13 Sep 2019 from Reminder Email SMS 30 m			

### **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.

CCM 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 Milne     Advie Weader     Alex Spangenberg     Ameria Tacogelevitch     Angle Rasberough     Armando Reichelt     Arv Huein	Chris Haynes C03 Admin Colin Holden Darryl Muller Derrick Weeder Edwil Maskva	Judith Mudsangi     Kashmira Nirghin     Kessa Halland     Kim Engelforecht     Lucky Marvuye     Malory Allibon     Marc Repsold     Marius Engelforecht	×
- Contact	<ul> <li>Full name John Smith</li> <li>Telephone 031 123 4567</li> </ul>		Email john@email.coza	
- Address	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 Past Code Country Country	-		
- Case	<ul> <li>Subject The subject of the case</li> <li>Information Additional information relating to</li> </ul>	the case		
	* Value 0 Case Type Type of Case		Source Type The type of source	
+ Related Customers	<ul> <li>Salesman Judih Mudzengi</li> <li>Type Type of activity</li> <li>Subject The subject of the activity</li> <li>Comments: Additional information relating to</li> </ul>	the activity		
+ Activity Attendees				
- Schedule	When 13 Sep 2019 from 11:00 Reminder Email SMS 30 minutes t	to 12:00 before scheduled start		
Submit Options	Show customer after save 🕑			
		🖹 Save		

#### **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.

CCM BPO2 Test I	Environment			Judith Mudzengi 🌣
📞 Create C	old Call			🔶 🖪
- Customer	* Customer Hope W * Rank Silver (/ Reg. No Registra	0 days)	* Type Retail VAT No. VAT number	
- Salesmen	Abigail Milne     Adele Weeder     Adele Sangenberg     Alex Sangenberg     Anmaria Teacy     Andromacha Joselevitch     Angie Rosborough     Armando Reichelt     Arv Huelin	Chris Haynes C03 Admin O C03 Admin O Dalene Pillay Dalene Pillay Darryi Mullar Derrick Weader Edrick Weader	Judith Mudzengi     Kashmira Nirghin     Kessis Maitand     Kim Engelbracht     Ludy/ Marinye     Malor/ Allicon     Marc Repsold     Marine Engelbracht	×
- Contact	* Full name John Sn * Telephone 031 123		Email john@email.coza	
- Address	Existing 26 Lave Address Line 1 26 Lave Address Line 2 New To Suburb Forest H City Durban Province/State K2N Post Code 1234 Country South A	n n Illa		
- Case	* Subject The sub Information Addition * Value 0	ect of the case al information relating to the case		←
+ Related Customers	Case Type Type of	lase	Source Type The type of source	
- Next Activity	* Salesman Judith N * Type Type of * Subject The sub Comments Addition	activity		
+ Activity Attendees				
- Schedule		2019 from 11:00 to 12:00 SMS - 30 minutes before scheduled start		
Submit Options	Show customer after save 🕑			
		🖹 Save		

#### **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.

CRM BPO2 Test	Environment				Judith Mudzengi 🎗
Create (	Cold Call				🔶 🗄
- Salesmen	Abigail Milne     Adele Weeder     Alex Spangenberg     Almeria Teacy     Andre Roseborough     Armando Reichelt     Arr Huelin	Debbie	lmin olden Pillay Muller Lugar Weeder	Judith Mudzengi     Kashimira Nirghin     Kessia Mailand     Kim Engelbracht     Lucky Mawuye     Malory Allibon     Marc Repsold     Marius Engelbracht	· ·
- Contact	* Full name * Telephone	John Smith 031 123 4567		Email_john@email.coza	
- Address	Address Line 1 Address Line 2 Suburb City Province/State Post Code	Forest Hills Durban KZN			
- Case		Site Inspection Site Inspection			
	* Value Case Type	100000 Corporate		Source Type Cold Call	
- Related Customers	Related Customers	C Related Customers			
- Next Activity	* Salesman * Type * Subject	Judith Mudzengi Type of activity The subject of the activity Additional information relating to the activity			
+ Activity Attendees					
- Schedule		13 Sep 2019 from 11:00 to 12:00 Email SMS 30 minutes before schedu			
Submit Options	Show customer after save	S			

#### • Related Customers:

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

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CCM BPO2 Test E	Environment				Judith Mudzengi 🌣
📞 Create C	old Call				← 🗎
- Customer		Hope Works Silver (60 days) Registration number		* Type Retail VAT No VAT number	
- Salesmen	Abigail Milne     Adele Weeder     Alex Spangenberg     Almeria Teacy     Andromache Joselevitch     Angie Roseborough     Armando Reichelt     Arv Huelin		Chris Haynes CO3 Admin Colin Holden Dalene Pillay Darryl Muller Debbie Lugar Dertick Weeder Edwell Msakwa	Judith Mudzengi     Kashmira Nirghin     Kessia Maitland     Kim Engelbracht     Lucky Mairivge     Maiory Alliban     Marc Respold     Marius Engelbracht	
- Contact	* Full name * Telephone	John Smith 031 123 4567		Email john@email.coza	
- Address	Address Line 1 Address Line 2 Suburb City Province/State Post Code	Forest Hills Durban KZN			
- Case	Information * Value				
- Related Customers		Corporate Customer JIRA Networked; 71505555 JIRA Networked - 71505555		Source Type Cold Call	3→□
- Next Activity	* Type * Subject	Judith Mudzengi Type of activity The subject of the activity Additional information relating to	the activity		
+ Activity Attendees					
- Schedule		13 Sep 2019 from 11:00 Email SMS 30 minutes b	to 12:00 refore scheduled start		
Submit Options	Show customer after save	v			
			B 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.

CRM BPO2 Test I	Environment				Judith Mudzengi 🌣
📞 Create C	old Call				🔶 🖨
- Salesmen	Abigail Milne     Adele Weeder     Alex Spangenberg     Almeria Teacy     Angie Roseborough     Armado Reichelt     Ary Huelin		Chris Haynes CO3 Admin Colin Holden Dalene Pillay Darryl Muller Debbie Lugar Derrick Weeder Edwell Msakwa	Judith Mudsengi     Kashinia Nirghin     Kessia Maitland     Kin Engelbrecht     Lucky Mawaye     Maiory Allibon     Marc Repsold     Marius Engelbrecht	î î
- Contact	* Full name * Telephone	John Smith 031 123 4567		Email john@email.coza	
- Address	Address Line 1 Address Line 2 Suburb City Province/State Post Code	Forest Hills Durban KZN			
- Case		Site Inspection Site Inspection			
	* Value Case Type			Source Type Cold Call	
- Related Customers	Related Customers	Related Customers No data to display			
- Next Activity	* Type * Subject	Judith Mudzengi Type of activity The subject of the activity Additional information relating to th	ne activity	←	
+ Activity Attendees					
- Schedule		13 Sep 2019 from 11:00 t Email SMS 30 minutes be			
Submit Options	Show customer after save				
			B Save		

### **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).
  - You can also link other employees, case customer contacts and related customer contacts. To do so, click on the **dropdown 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 .

CCM BPO2 Test B					Judith Mudzengi 🌣
- Customer	* Rank	Hope Works Silver (60 days) Registration number		* Type Retail VAT No VAT number	
- Salesmen	Abigail Milne     Adele Weeder     Alex Spangenberg     Almeria Teacy     Andromache Joselevitch     Angie Roseborough     Armando Reichelt     Arv Huelin		Chris Haynes CO3 Admin Colin Holden Dalene Pillay Darryl Muller Debbie Lugar Derrick Weeder Edwell Msakwa	Judith Mudzengi     Kasimira Nirghin     Kessia Maidand     Kim Engelbrecht     Lucky Mawuye     Malory Allibon     Marc Repsold     Marus Engelbrecht	
- Contact	* Full name * Telephone	John Smith 031 123 4567		Email john@email.coza	
- Address	Address Line 1 Address Line 2 Suburb City Province/State Post Code	Forest Hills Durban KZN			
- Case		Site Inspection Site Inspection			
	* Value Case Type	100000 Corporate Customer		Source Type Cold Call	
- Related Customers	Related Customers	<ul> <li>Related Customers</li> <li>No data to display</li> </ul>			
- Next Activity	* Type * Subject	Judith Mudzengi Site inspection Site Inspection Site inspection at site 2			
- Activity Attendees	Attendees	O E condees		are always made attendees 🗲 🕕 🚺	
- Schedule	When	<ul> <li>*note that invitations can only be sen</li> <li>13 Sep 2019 from 11:00 to 1</li> <li>Email SMS 30 minutes before so</li> </ul>	2:00	resses 🗲 4	
Submit Options	Show customer after save				
			Save		

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



CCM BPO2 Test	Environment					Judith Mudzengi 🌣
📞 Create C	Cold Call					🔶 🗎
- Customer	* Rank	Hope Works Silver (60 days) Registration number		* Type F VAT No V	letail AT number	
- Salesmen	Abigail Milne     Adele Weeder     Alex Spangenberg     Almeria Teacy     Andre Roseborough     Armando Reichelt     Ary Huelin		Chris Haynes CO3 Admin Colin Holden Dalene Pillay Darnyl Muller Debbie Lugar Derrick Weeder Edwell Msakwa		Judith Mudzengi     Kashmira Nirghin     Kessia Maitland     Kim Engelbrecht     Lucky Mawuye     Malory Allibon     Marc Repsold     Marius Engelbrecht	
- Contact	* Full name * Telephone	John Smith 031 123 4567		Email j	ohn@email.coza	
- Address	Address Line 1 Address Line 2 Suburb City Province/State Post Code	Forest Hills Durban KZN				
- Case		Site Inspection Site Inspection				
		Corporate Customer		Source Type C	Cold Call	
- Related Customers	Related Customers	<ul> <li>Related Customers</li> <li>No data to display</li> </ul>				
- Next Activity	* Type * Subject	Judith Mudzengi Site inspection Site Inspection Site inspection at site 2				
- Activity Attendees	Attendees	<ul> <li>Abigail Milne;</li> <li>Abigail Milne</li> </ul>				5-→[
	Send Email Invites	*note that invitations	s can only be sent to attendees with	valid email addresses		
- Schedule	When Reminder	13 Sep 2019 from Email SMS 30 n	11:00 to 12:00 ninutes before scheduled start			
Submit Options	Show customer after save	V				
			🖹 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.

📞 Create (	Cold Call				
Customer		Hope Works Silver (60 days) Registration number		* Type Retail VAT No VAT number	
Salesmen	Abigail Milne     Adele Weeder     Alex Spangenberg     Ameria Teacy     Andromache Joselevitch     Angie Roseborough     Armando Reichelt     Ary Huelin		Chris Haynes CO3 Admin Colin Holden Dalene Pillay Debbie Lugar Detrick Weeder Edvell Maakva	Judith Mudzengi     Kashmira Nirghin     Kosis Matland     Kim Engelbrecht     Lucky Maruyre     Malory Allibon     Marc Repsold     Marus Engelsrecht	
Contact	* Full name * Telephone	John Smith 031 123 4567		Email john@email.coza	
Address	Address Line 1 Address Line 2 Suburb City Province/State Post Code	Forest Hills Durban KZN			
Case	Information * Value				
Related Customers		Corporate Customer     Related Customers     No data to display		Source Type Cold Call	
Next Activity	* Type * Subject	Judith Mudzengi Site inspection Site Inspection Site inspection at site 2			
Activity Attendees	Attendees			isman are always made attendees	
Schedule	When		n only be sent to attendees with valid em	ill addresses	
	Show customer after save		use peroré scheduled start		

### **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.



📞 Create (	Cold Call				🔶 🗧
		pe Works ver (60 days) gistration number		* Type Retail VAT No VAT number	
- Salesmen	Abigail Milne     Adele Weeder     Alex Spangenberg     Almeria Teacy     Andromache Joselevitch     Angle Roseborough     Armando Reichelt     Ary Huelin		Chris Haynes CO3 Admin Colin Holden Darryl Muller Debbie Lugar Derrick Weeder Edwell Msakwa	Judith Mudzengi     Kashmira Nirghin     Kashmira Nirghin     Kesia Malitad     Kim Engelbrecht     Lucky Mawye     Malory Allibon     Marc Repold     Marus Engelbrecht	
Contact	* Full name Joh * Telephone 03			Email john@email.coza	
• Address	Existing 26 Address Line 1 26 Address Line 2 Ne Suburb For City Du Province/State K2 Post Code 12 Country So	w Town rest Hills rban N 34			
• Case	* Subject Sit Information Sit * Value 10	e Inspection			
		rporate Customer		Source Type Cold Call	
	Related Customers 🙃 No	Related Customers data to display			
• Next Activity	* Subject Site	e inspection			
Activity Attendees	Attendees 📀		Case contact a n only be sent to attendees with va	nd salesman are always made attendees Iid amail addrosses	
• Schedule	When 16	Sep 2019 from 11	:00 to 12:00 utes before scheduled start	an in an	
Submit Options	Show customer after save	-			

#### Save

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



CCM BPO2 Test E	Environment				Judith Mudzengi 🌣
📞 Create C	old Call				🔶 🖨
- Customer		Hope Works Silver (60 days) Registration number		* Type Retail VAT No VAT number	2
- Salesmen	Abigail Milne     Adele Weeder     Alex Spangenberg     Almeria Teacy     Andromache Joselevitch     Angie Roseborough     Armando Reichelt     Arv Huelin		Chris Haynes CO3 Admin Colin Holden Dalane Pillay Derryt Muller Debbie Lugar Derrick Weeder Edwell Maskwa	Judith Mudzengi     Kashmira Nirghin     Kesi Maltland     Kim Engelbracht     Lucky Marcuye     Malory Allbon     Marc Rapsold     Marius Engelbracht	•
- Contact	* Full name * Telephone	John Smith 031 123 4567		Email john@email.coza	
- Address	Address Line 1 Address Line 2 Suburb City Province/State Post Code	Forest Hills Durban KZN			
- Case	Information * Value				
- Related Customers		Corporate Customer Related Customers No data to display		Source Type Cold Call	
- Next Activity	* Type * Subject	Judith Mudzengi Site inspection Site Inspection Site inspection at site 2			
- Activity Attendees		Attendees     *note that invitations ca	Case contact and	salesman are always made attendees email addresses	
- Schedule	When	16 Sep 2019 from 11 Email SMS 15 min	:00 to 12:00		2
Submit Options	Show customer after save	V			
		0-	► 🖹 Save		

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



### Cold Call

<b>CRM</b> BPO2	Test Enviro	onment					Judith Mudzengi 🌻
📕 Норе	e Works					🕀 Search	۹
Act	ivities for I	Last 30 Day	s	Performance		Pipeline	
Description		Existing Custmrs	New Custmrs				
				0.40		Fetching data.	-
				0.00 0 0.2 0.4 0.6	0.8 1		
			Hope Wor	<s -="" hop0001<="" th=""><th></th><th></th><th></th></s>			
	Ŷ			Trading Name Hope Registered Name Hope Description			75%
create cold call		warnings		VAT No			
				Rank Silve Website http:/	ys.		
	- <b></b> -	Ē	Greated: 2210/0	Phone 031	123 4567		
customers		activities	۱.	g 📾 🔒 x			
					Months Sales	History	
$\mathcal{Q}$				0.5	Fioricits Suice	stristory	
quotes	orders	invoices		0.45			
				0.35			
5	<b>O</b>			0.25			
credit notes	equipment	contracts		0.15			
				0.05			
	🗶 -			and the coast and the second	an and responsible the set of the set of the set	The set of	
service calls				Salar State State State	the Burg charge war, we .	and the second second	
					Contract Income Sal	les Revenue	
				©2019 CO3 Technologies (Pty) Ltd ( 3.5.5.1	l / 3.5.5.1)		

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