

### Welcome to Nucleus CRM Mobile Online Help

The Sales Connect mobile application provides a quick, simple interface for sales people to perform basic operations to manage their daily CRM Activities. The functionality includes:

- CRM Activities displayed in a calendar view
- The ability to filter these Activities by Activity Type
- Linking Images to the Activities Case
- Editing Activity Notes
- Logging the **Start** and **End** of an Activity
- Logging Start and End Travel for Meeting Activities
- Creating the **Next Activity** or **Rescheduling** an Activity

Sales Connect also enhances the effective management and reporting on sales performance in the field by:

- Enforcing the capture of data
- Capturing additional business relevant management information
- Logging the activities and movements of sales people



### **QUICK LINKS**



### Introduction to CRM Mobile



Download and Log In/Out

Help v2024.5.0.7/1.0 - Pg 2 - Printed: 21/08/2024





**Environment** 



Edit Activity Details

Help v2024.5.0.7/1.0 - Pg 3 - Printed: 21/08/2024

CO3 Technologies (Pty) Ltd © Company Confidential





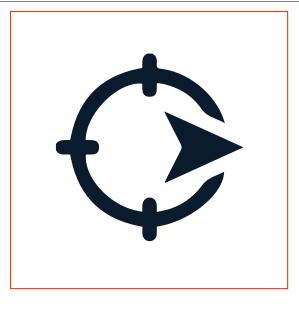
Link Image/Photo to an Activity



Add Notes to an Activity

Help v2024.5.0.7/1.0 - Pg 4 - Printed: 21/08/2024





Link Start and End Travel to an Activity

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

## Latest Updates

- The apk is now 64 bit compatible (it was only x86 compatible previously)
- The apk is now fully compatible with Android 9 and 10

# Connectivity

The CRMWebService will provide the end points to read and write the relevant data via a REST web service that sends and receives data in JSON format.

# **Application Version Compatibility**



- Sales Connect v1.0.12 Release
- BPOCRM v3.5.5.1 or later
- SalesConnect apk v1.0.12 or later
- BPO\_RSI v1.27.0.0 or later | BPO\_TEL v1.4.0.0 or later | BPO2 v2.1.0.31 or later

LP06

Help v2024.5.0.7/1.0 - Pg 6 - Printed: 21/08/2024

CO3 Technologies (Pty) Ltd © Company Confidential