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

SALES CONNECT

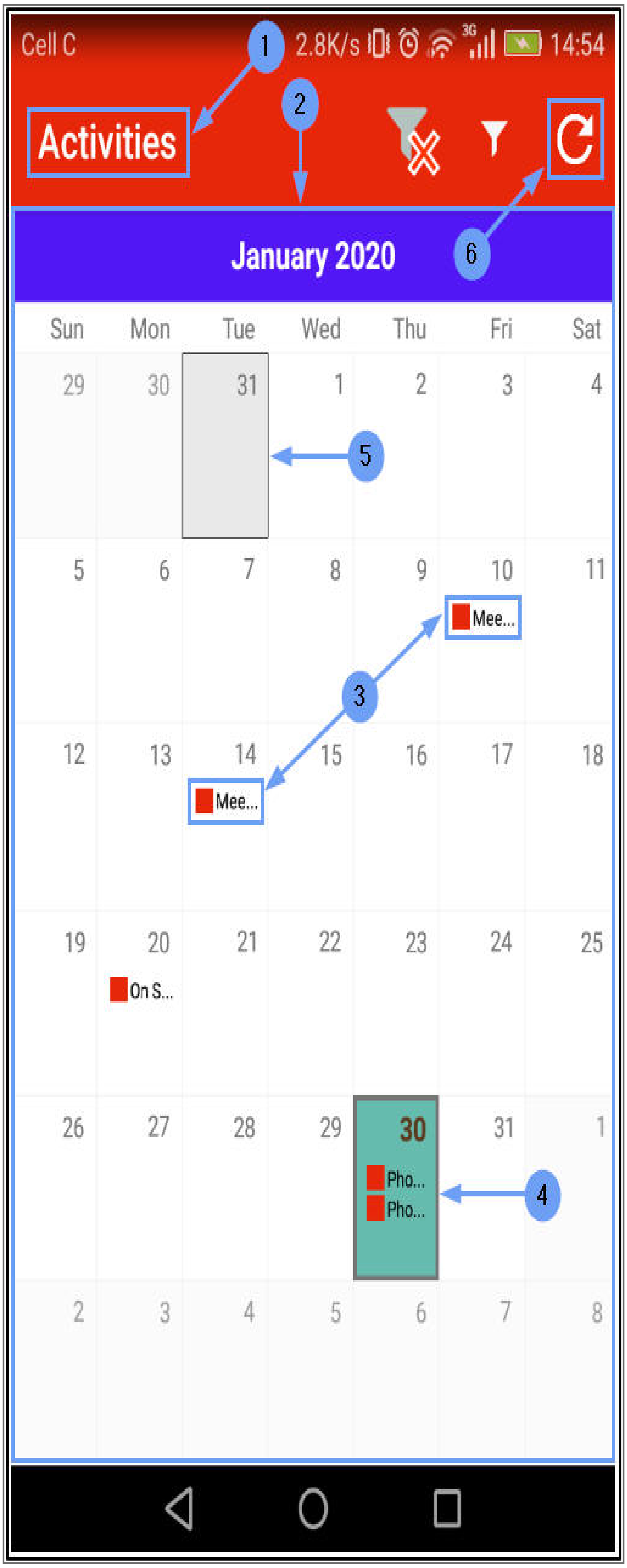
ENVIRONMENT

There are two main screens in the Sales Connect environment. After login the **Activities** screen will open. Selections made in this screen will direct you to the **Activity Details** screen. From here you are able to navigate to 3 sub-sidiary screens: the **Call** screen, the **Compose** screen and the **Start Travel** screen, as well as three **edit activity** screens: **Reschedule Activity**, **Add Photo** and **Add Activity Note**.

[Watch the video]

ACTIVITIES SCREEN OVERVIEW

1. After initial login the Activities screen will open.
2. This will display a **calendar view** of the current month.
   i. Swipe left to view **future** months.
   ii. Swipe right to view **previous** months.
   iii. Touch and hold an area on your device with two fingers, then pinch them together to zoom out to see the **year view**.
   iv. Touch and hold an area with two fingers. Then spread them apart to zoom back in to the **month view**.
3. The salesperson activities will display as **red squares** on the particular day that they are due.
4. The **current** day will be highlighted in colour.
5. Any day you tap on will be highlighted grey.
6. If there was a period where you did not have internet connection, you can select **Refresh** to check for any activities recently added in **CRM**.

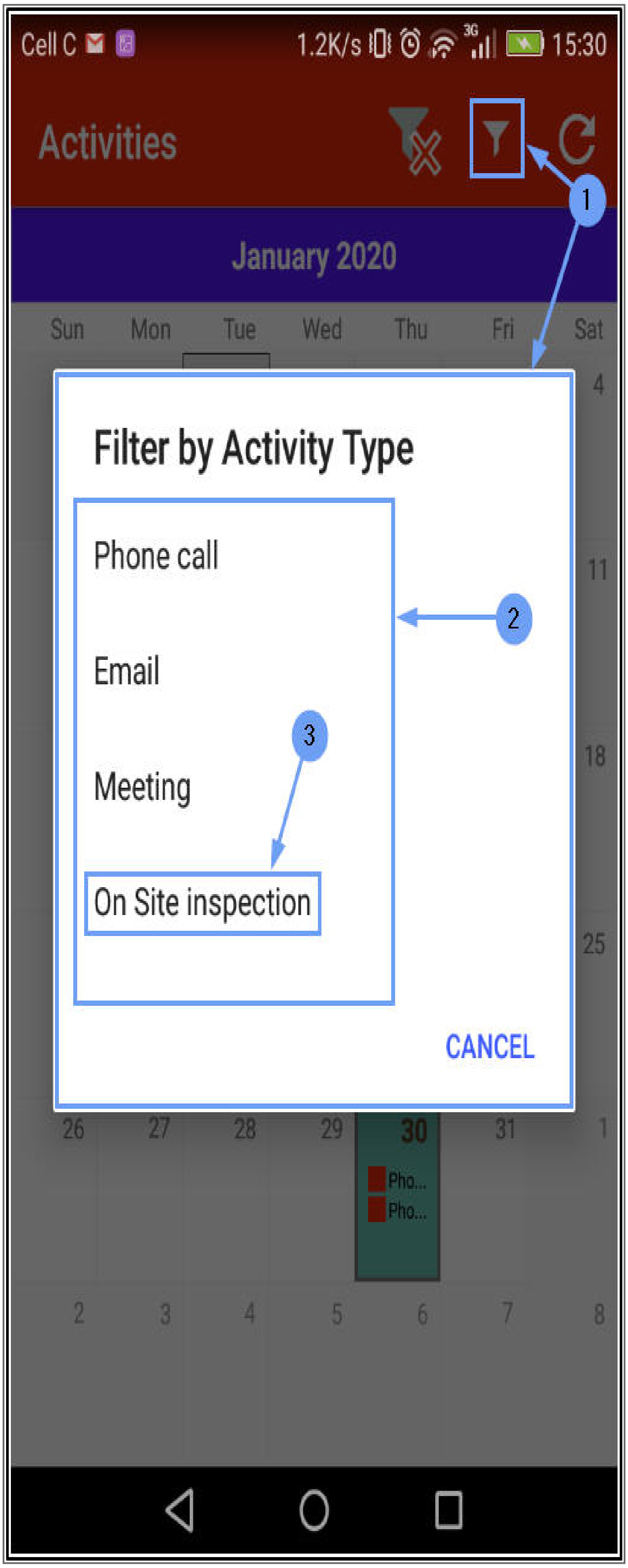

Cell C
2.8K/s
14:54
Activities
January 2020
Sun Mon Tue Wed Thu Fri Sat
Mee...
Mee...
On S...
Pho...
Pho...
1
2
3
4
5
6

FILTER BY ACTIVITY TYPE

1. Tap on the Filter icon to display the **Filter by Activity Type** menu.
2. Select an **Activity Type** from the list.

   Note: All Activity Types can be configured in CRM according to your company requirements.

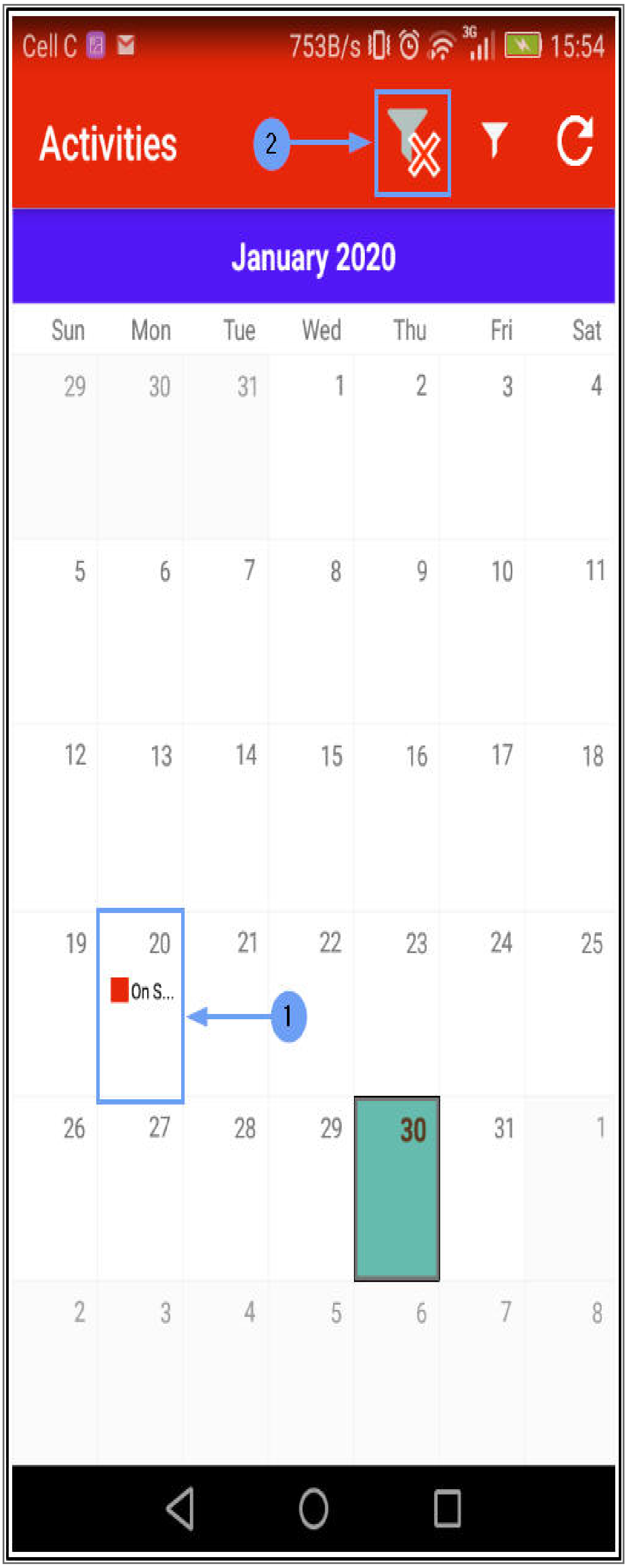
3. In this example, **Site Inspection** has been selected.


Cell C
1.2K/s
15:30
Activities
1
January 2020
Sun
Mon
Tue
Wed
Thu
Fri
Sat
Filter by Activity Type
Phone call
2
Email
3
Meeting
On Site inspection
CANCEL
26
27
28
29
30
31
1
Pho...
Pho...
2
3
4
5
6
7
8

1. The screen will filter and display on the calendar, only the activity types selected in the previous step. In this example only **Site Inspection** activities are now displayed.

REMOVE ACTIVITY TYPE FILTER

2. Tap on the **Clear Filter** icon to display all the activity types again.

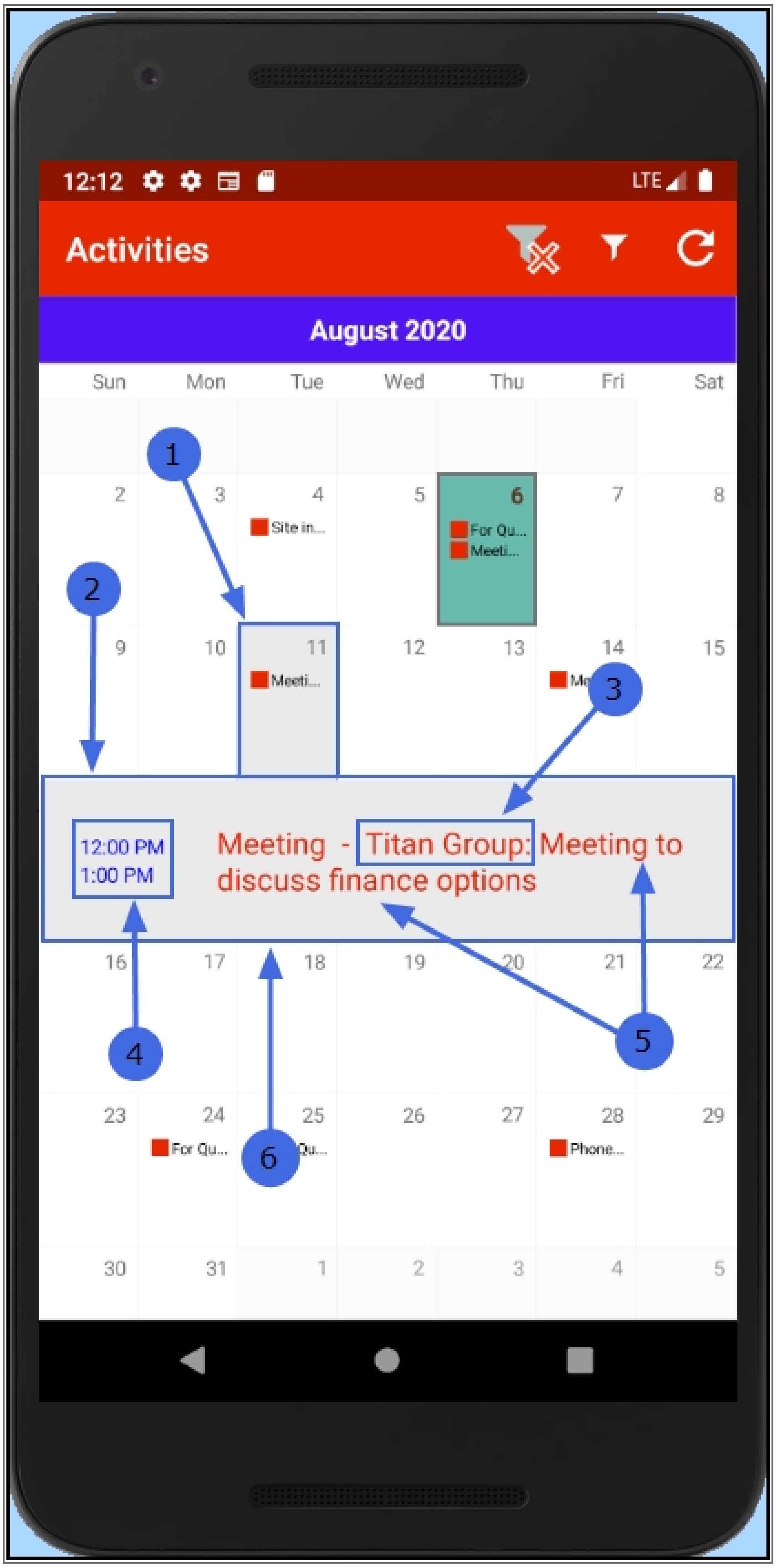

Cell C
753B/s
15:54
Activities
2
January 2020
Sun
Mon
Tue
Wed
Thu
Fri
Sat
29 30 31 1 2 3 4
5 6 7 8 9 10 11
12 13 14 15 16 17 18
19 20 21 22 23 24 25
On S...
1
26 27 28 29 30 31 1
2 3 4 5 6 7 8

QUICK VIEW ACTIVITY INFORMATION

1. Tap on a **date** that contains an activity.
    - In this example the **11th** has been selected - this date contains a **Meeting** activity.
2. A **text box** will pop up with more information regarding the activity.

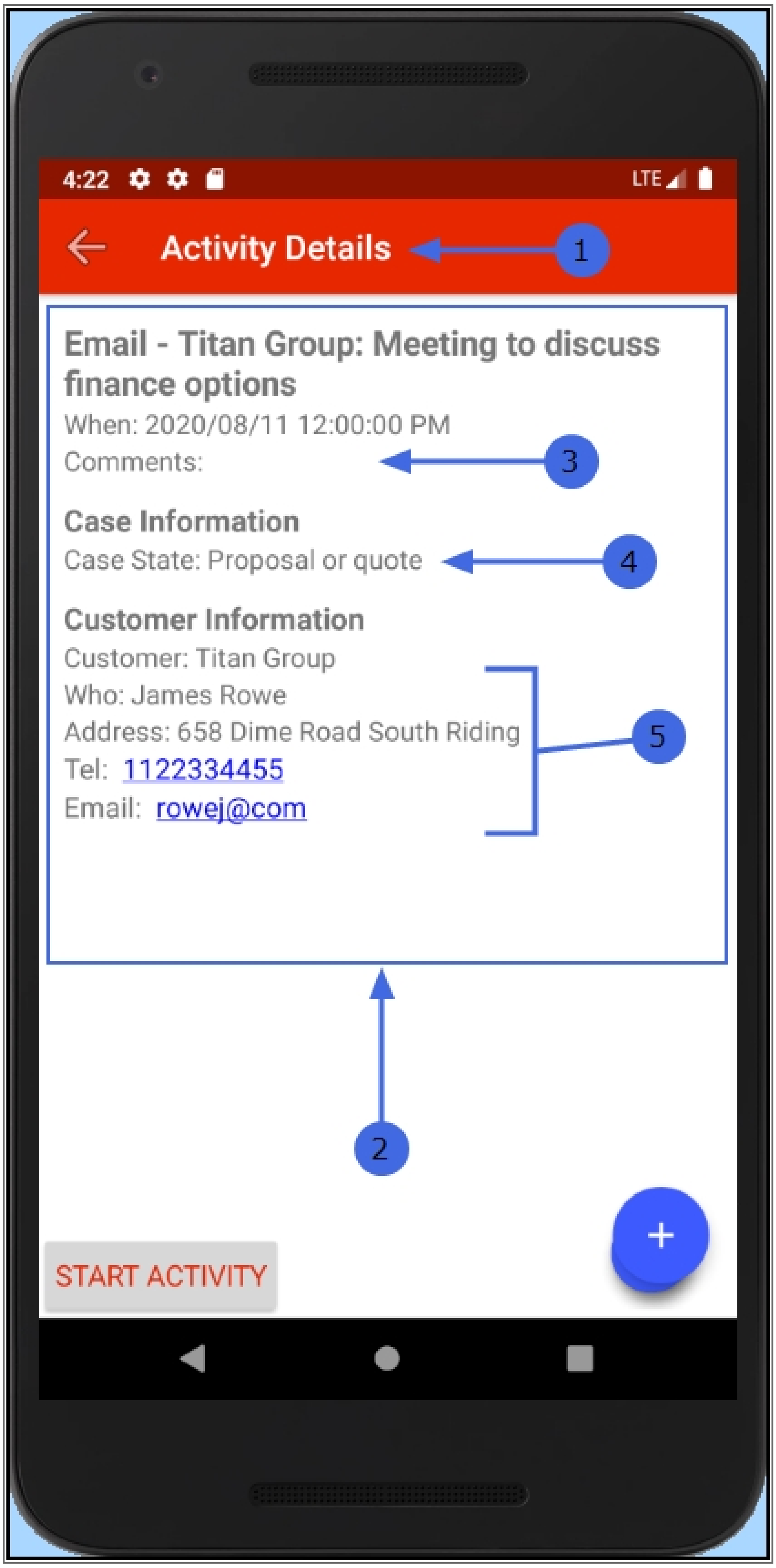
You can now view:

3. the **name** of the customer linked to the activity,
4. the **time** of the activity and
5. a brief **description** of the subject of the activity.
6. Tap on the text box.


12:12
LTE
Activities
August 2020
Sun
Mon
Tue
Wed
Thu
Fri
Sat
1
2
3
4
5
6
Site in...
For Qu...
Meeti...
12:00 PM
1:00 PM
Meeting - Titan Group: Meeting to discuss finance options
Phone...

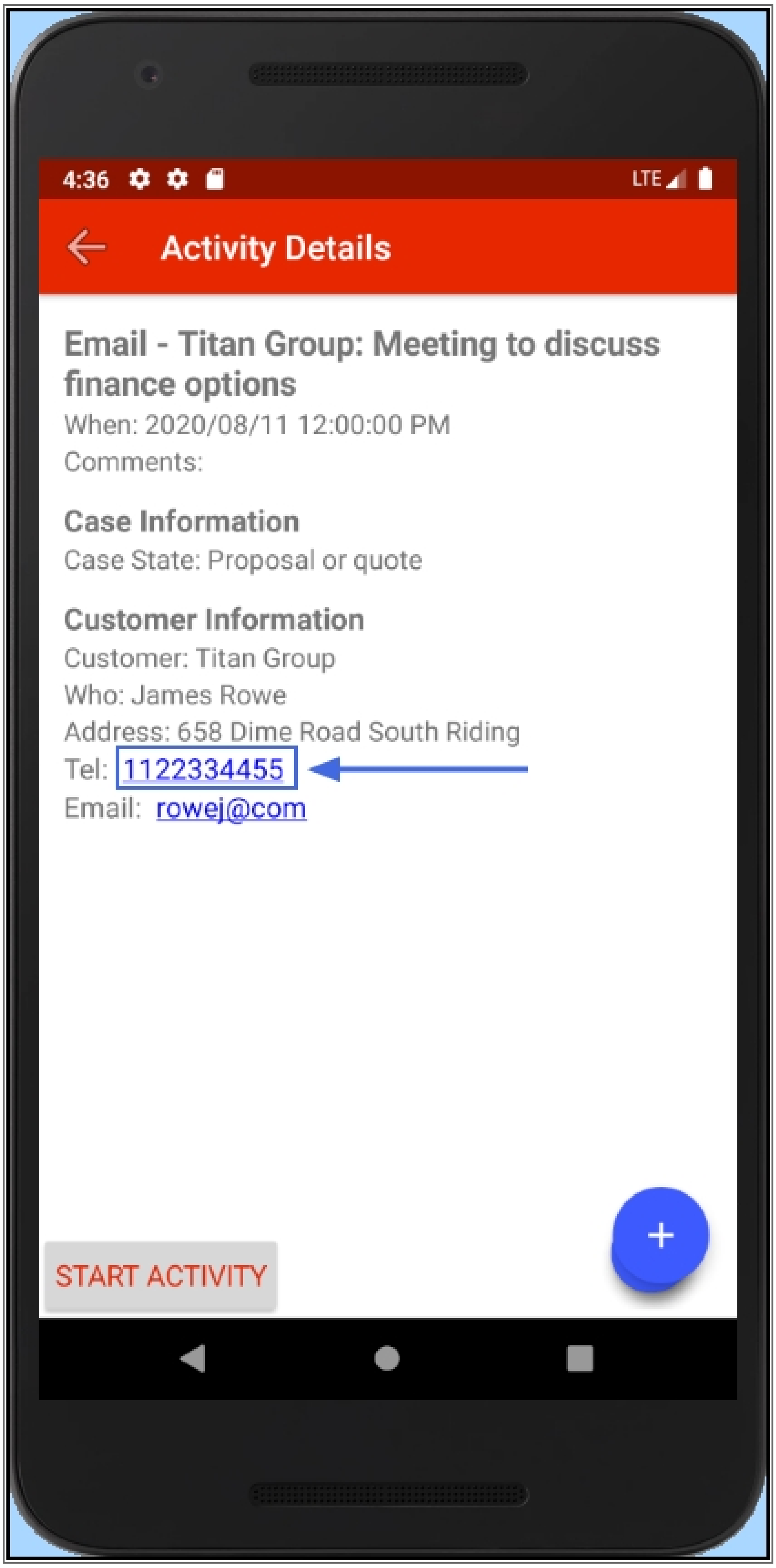
THE ACTIVITY DETAILS SCREEN

1. The **Activity Details** screen will be displayed.
2. Here you can view much more information regarding the activity:
3. any linked **Comments** (if text has been typed into the Activity 'Comments' section in CRM),
4. the **Case State** and
5. More **Customer** specifics, such as:
   - **who** the meeting is with and **where** it is (the **address**)
   - the **Telephone No.** and **Email Address** of the customer (if these details have been entered onto **CRM/BPO**).


4:22
LTE
Activity Details
1
Email - Titan Group: Meeting to discuss finance options
When: 2020/08/11 12:00:00 PM
Comments:
3
Case Information
Case State: Proposal or quote
4
Customer Information
Customer: Titan Group
Who: James Rowe
Address: 658 Dime Road South Riding
Tel: 1122334455
Email: rowej@com
5
2
START ACTIVITY
+

CALL CUSTOMER - FROM THE ACTIVITY DETAILS SCREEN

- Tap on the blue customer **Telephone Number** in this screen.


4:36
LTE
Activity Details
Email - Titan Group: Meeting to discuss finance options
When: 2020/08/11 12:00:00 PM
Comments:
Case Information
Case State: Proposal or quote
Customer Information
Customer: Titan Group
Who: James Rowe
Address: 658 Dime Road South Riding
Tel: 1122334455
Email: rowej@com
START ACTIVITY
+

The Call (Phone) Screen

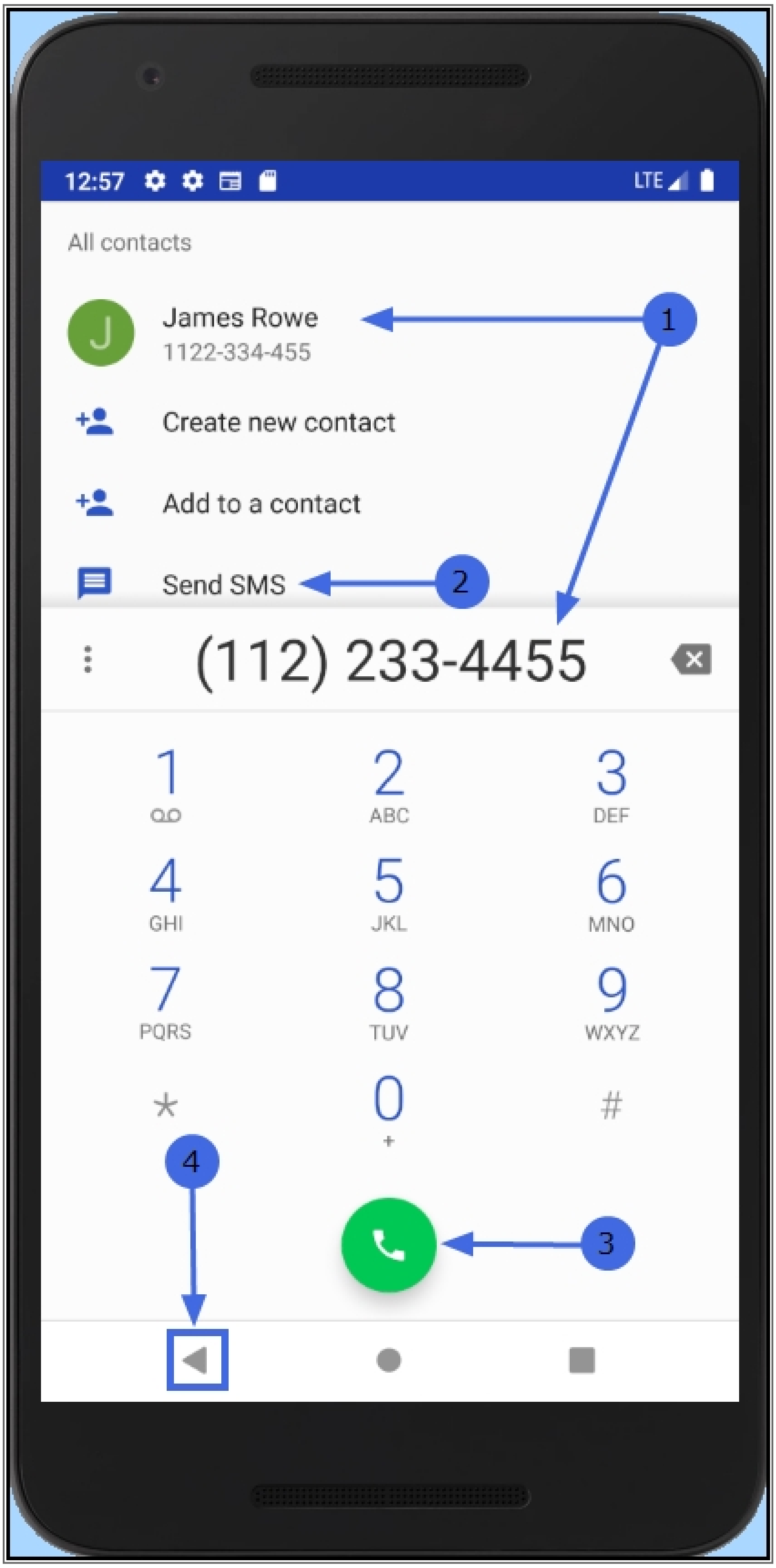
1. The **Call (Phone)** screen will be displayed. Here you can view: the **customer name** and **number**

   You can select whether to

2. send an **sms** or
3. **call** your customer

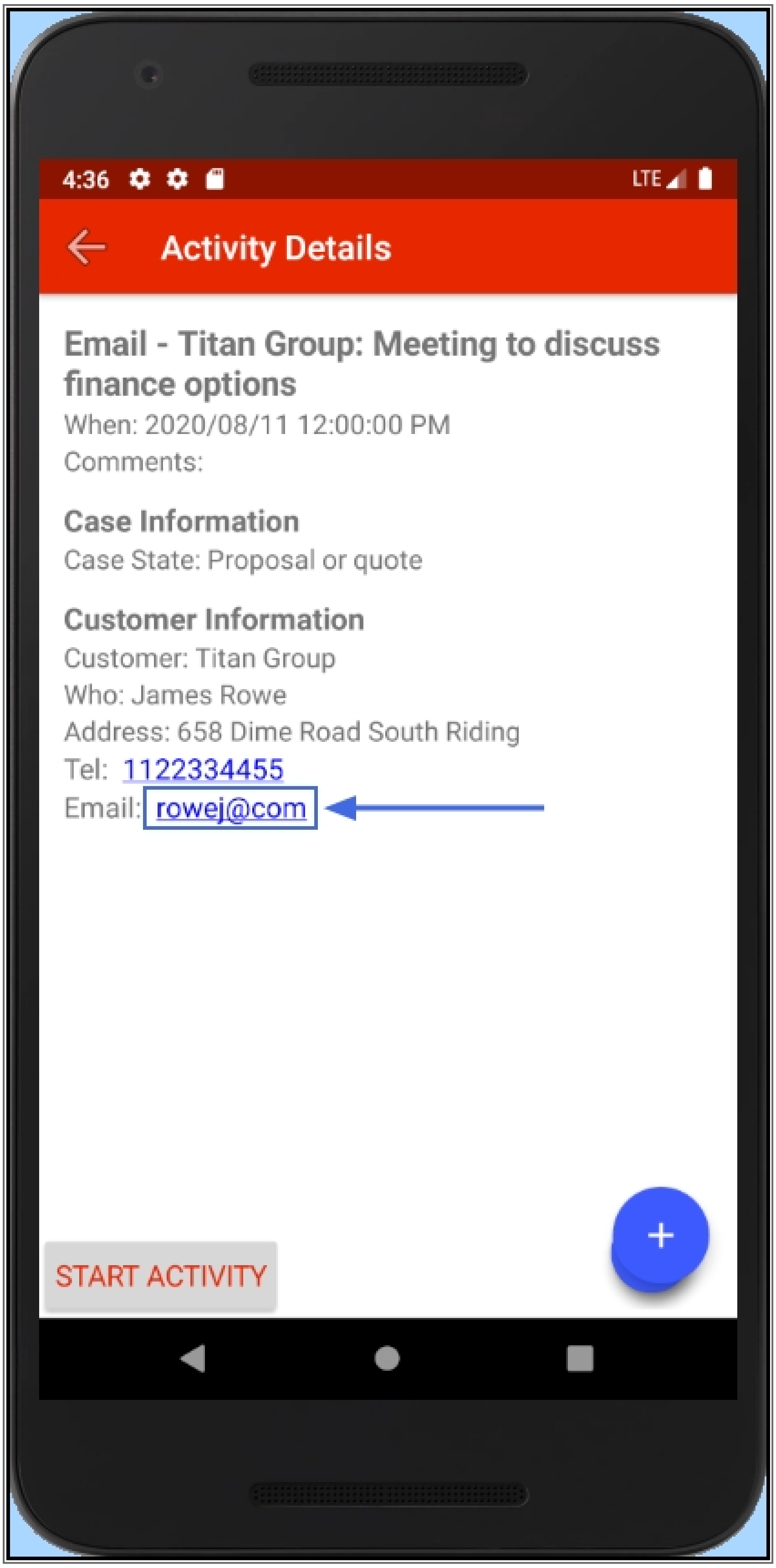
Cancel Call / Exit Call (Phone) Screen

4. Tap on the **Back** button to return to the **Activity Details** screen.


12:57
LTE
All contacts
James Rowe
1122-334-455
1
Create new contact
Add to a contact
Send SMS
2
(112) 233-4455
1
2
ABC
3
DEF
4
GHI
5
JKL
6
MNO
7
PQRS
8
TUV
9
WXYZ
*
0
+
#
4
3

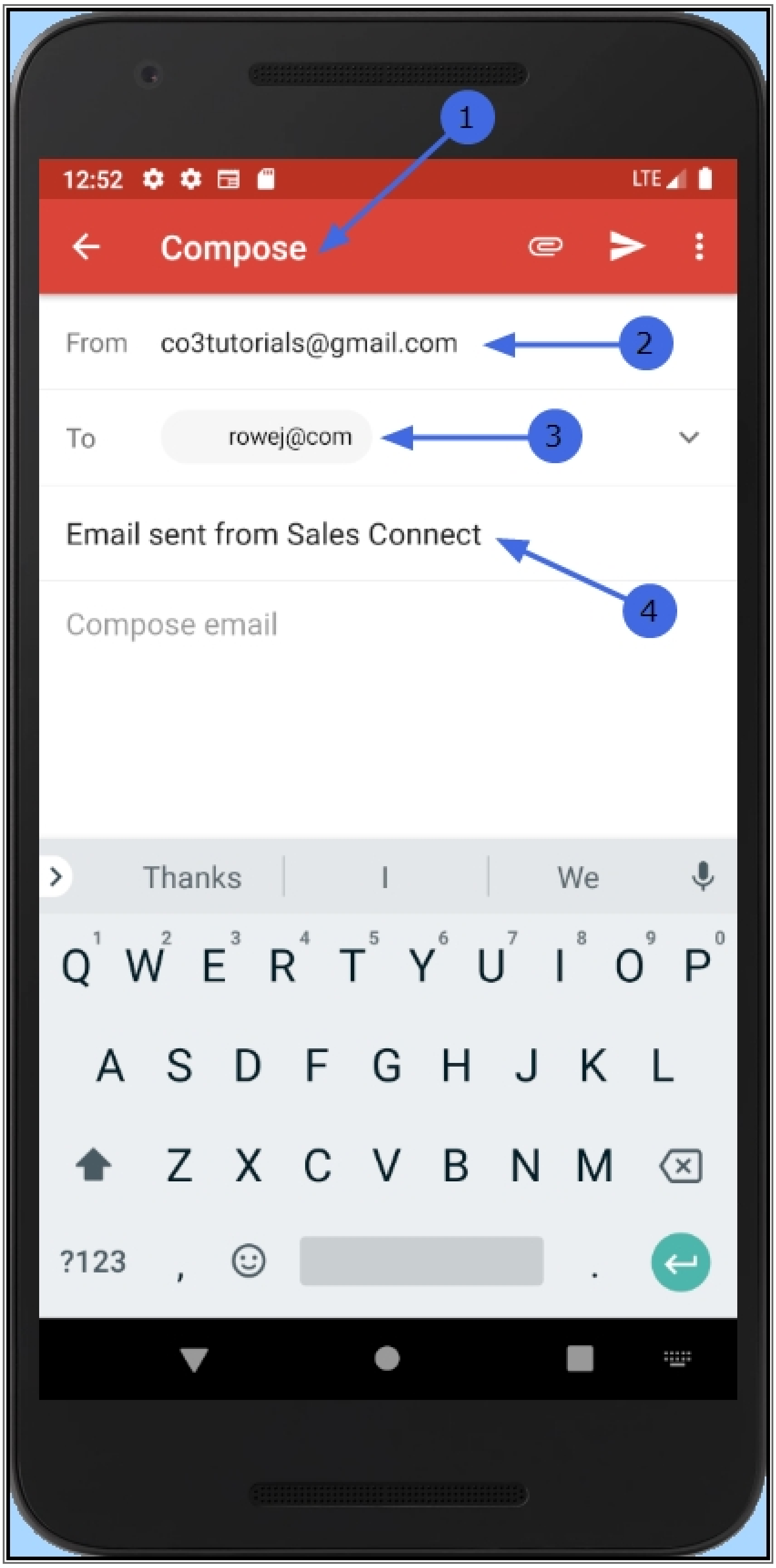
EMAIL CUSTOMER - FROM THE ACTIVITY DETAILS SCREEN

- In the Activity Details screen, tap on the blue customer **Email Address**.

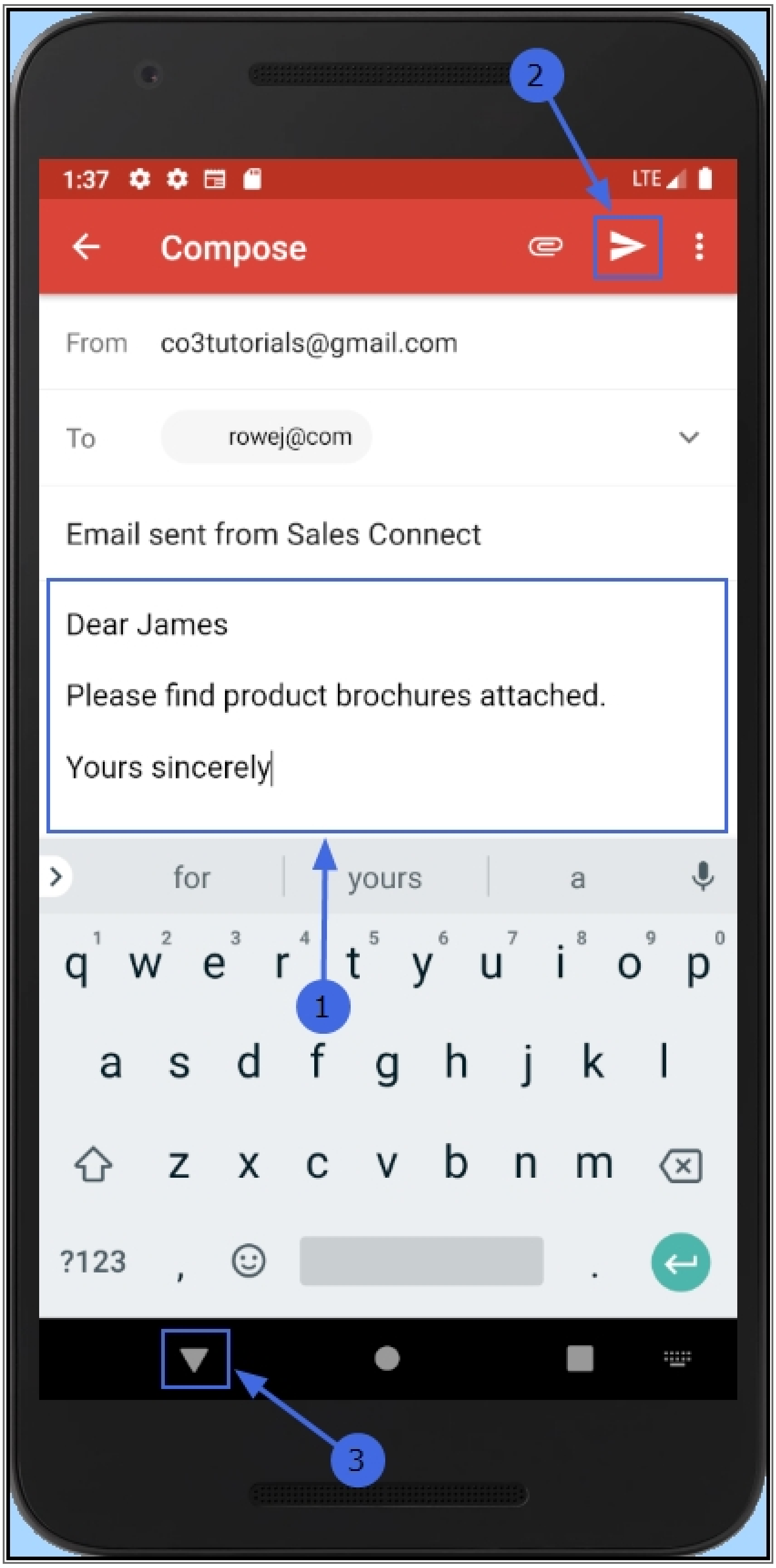

4:36
LTE
Activity Details
Email - Titan Group: Meeting to discuss finance options
When: 2020/08/11 12:00:00 PM
Comments:
Case Information
Case State: Proposal or quote
Customer Information
Customer: Titan Group
Who: James Rowe
Address: 658 Dime Road South Riding
Tel: 1122334455
Email: rowej@com
START ACTIVITY
+

The Compose (Email) Screen

1. The **Compose** (Email) screen will be displayed. Here you can view:
2. **From**: the address from which this email will be sent.
3. **To**: the destination address.
4. **Email header**: This will be auto populated but you can replace the header text with your own words.

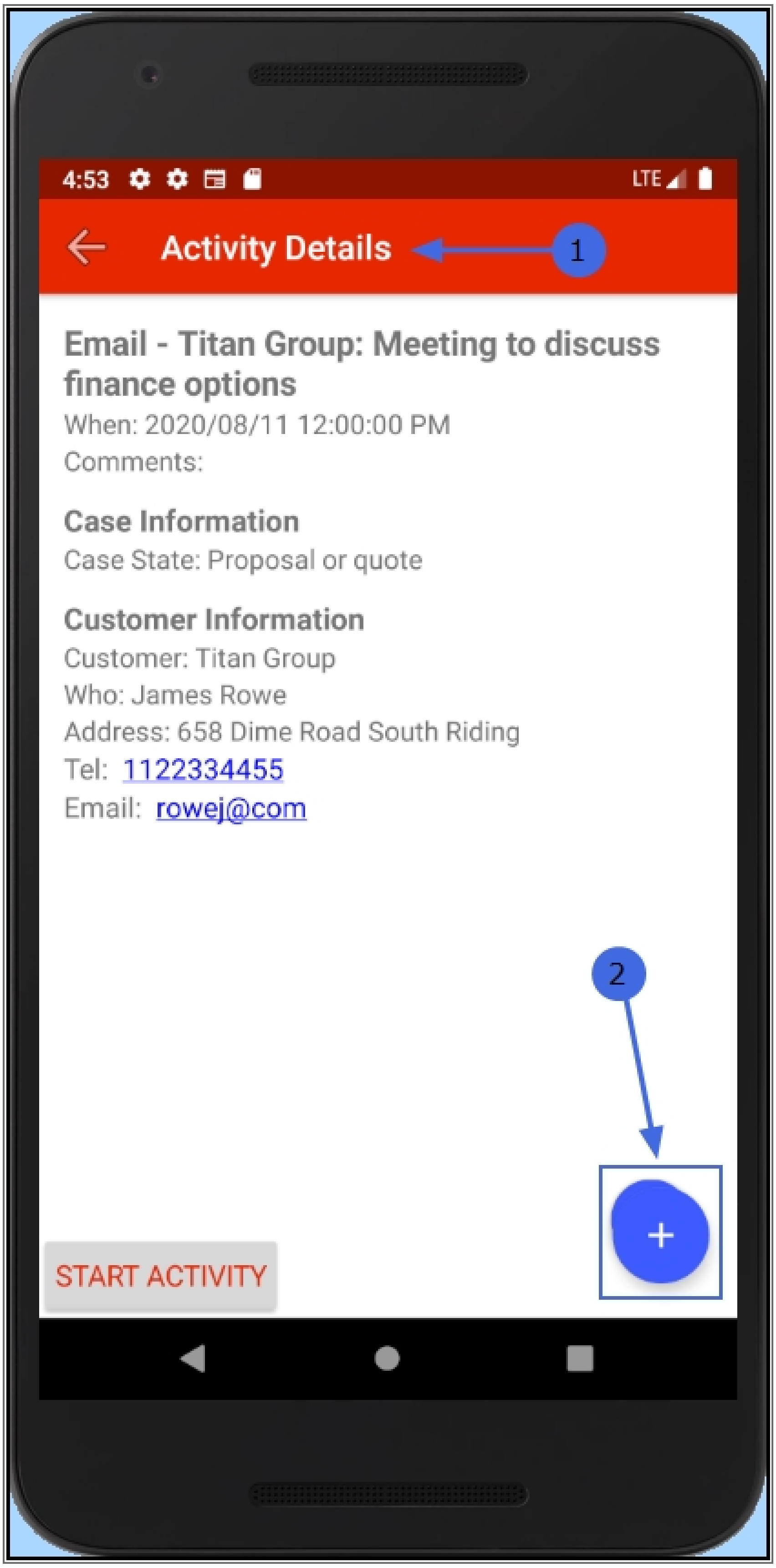

12:52
LTE
Compose
From
co3tutorials@gmail.com
To
rowej@com
Email sent from Sales Connect
Compose email
1
2
3
4
Thanks
I
We
?123

1. When you have composed your email content, either tap on
2. **Send** to dispatch your email, (you will then return to the **Activity Details** page) or
3. tap on **Back** to discard the email and return to the **Activity Details** page.


2
1:37
LTE
Compose
From
co3tutorials@gmail.com
To
rowej@com
Email sent from Sales Connect
Dear James
Please find product brochures attached.
Yours sincerely
for
yours
a
1
3

THE ACTIVITY EDIT BUTTONS

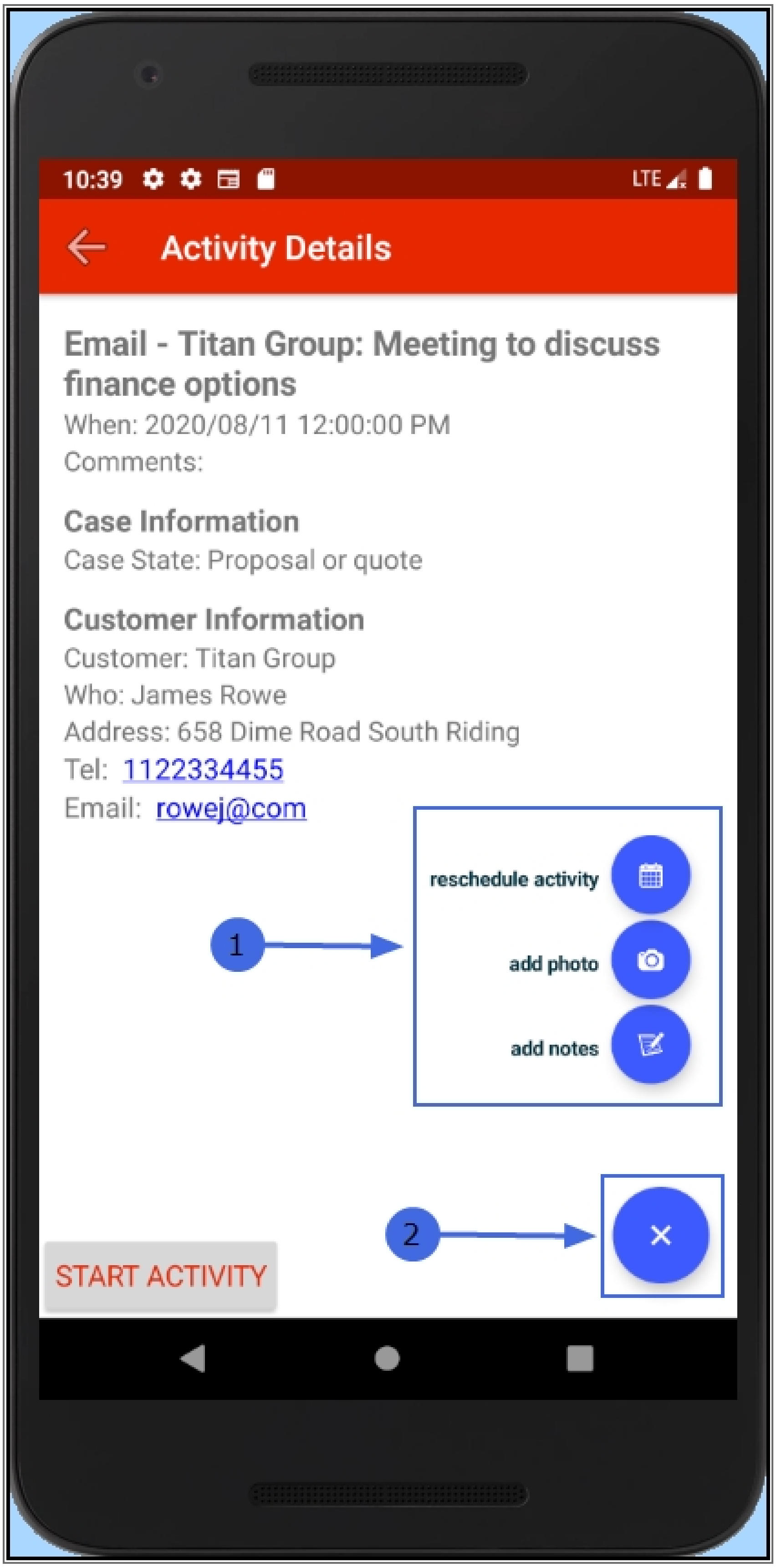
1. In the **Activity Details** screen,
2. tap on the expand **[+]** button.


4:53
LTE
Activity Details
1
Email - Titan Group: Meeting to discuss finance options
When: 2020/08/11 12:00:00 PM
Comments:
Case Information
Case State: Proposal or quote
Customer Information
Customer: Titan Group
Who: James Rowe
Address: 658 Dime Road South Riding
Tel: 1122334455
Email: rowej@com
2
START ACTIVITY
+

1. The screen will now display **3** editing buttons:
    i. reschedule activity
    ii. add photo
    iii. add notes

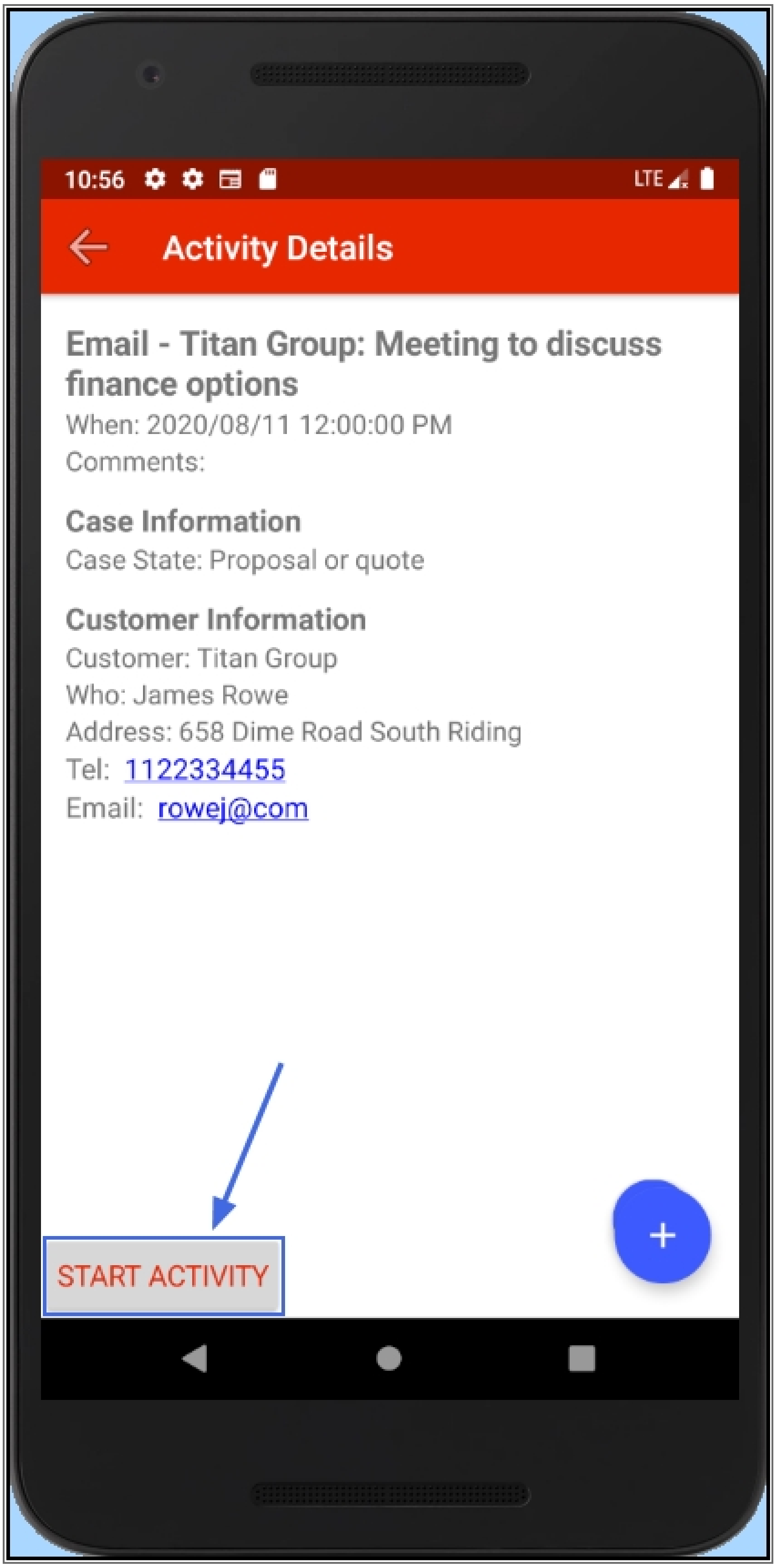
    These are covered in more detail in the Related Topics manuals.

2. Tap on **[x]** to collapse the edit buttons.


10:39
LTE
Activity Details
Email - Titan Group: Meeting to discuss finance options
When: 2020/08/11 12:00:00 PM
Comments:
Case Information
Case State: Proposal or quote
Customer Information
Customer: Titan Group
Who: James Rowe
Address: 658 Dime Road South Riding
Tel: 1122334455
Email: rowej@com
reschedule activity
add photo
add notes
1
2
START ACTIVITY

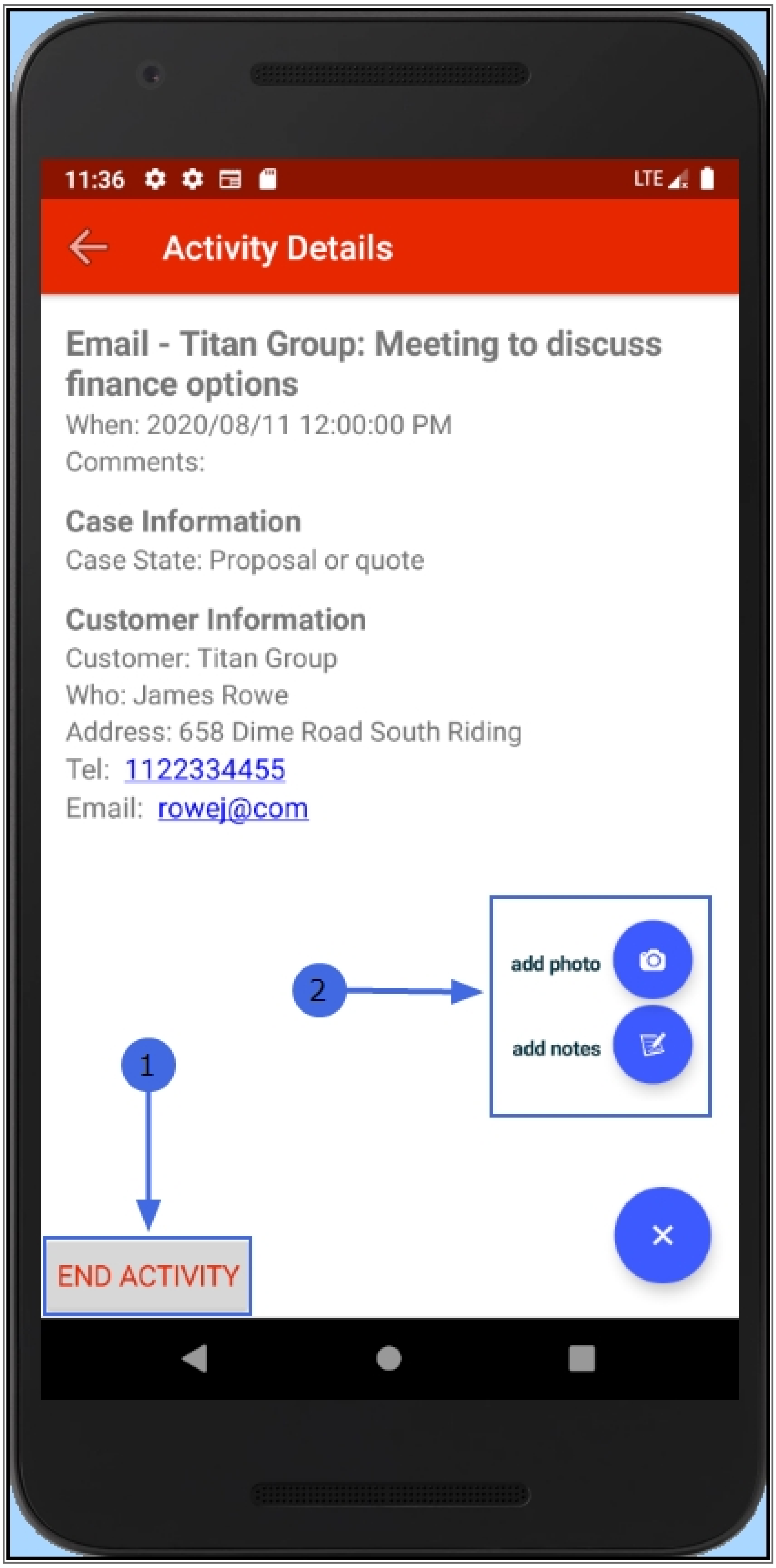
THE START / END ACTIVITY BUTTON

- If the activity that you have selected to view has not yet begun, a **Start Activity** button will be available in this screen.
- When you are ready to begin the activity, tap on this button.


10:56
LTE
Activity Details
Email - Titan Group: Meeting to discuss finance options
When: 2020/08/11 12:00:00 PM
Comments:
Case Information
Case State: Proposal or quote
Customer Information
Customer: Titan Group
Who: James Rowe
Address: 658 Dime Road South Riding
Tel: 1122334455
Email: rowej@com
START ACTIVITY
+

The screen will **refresh**

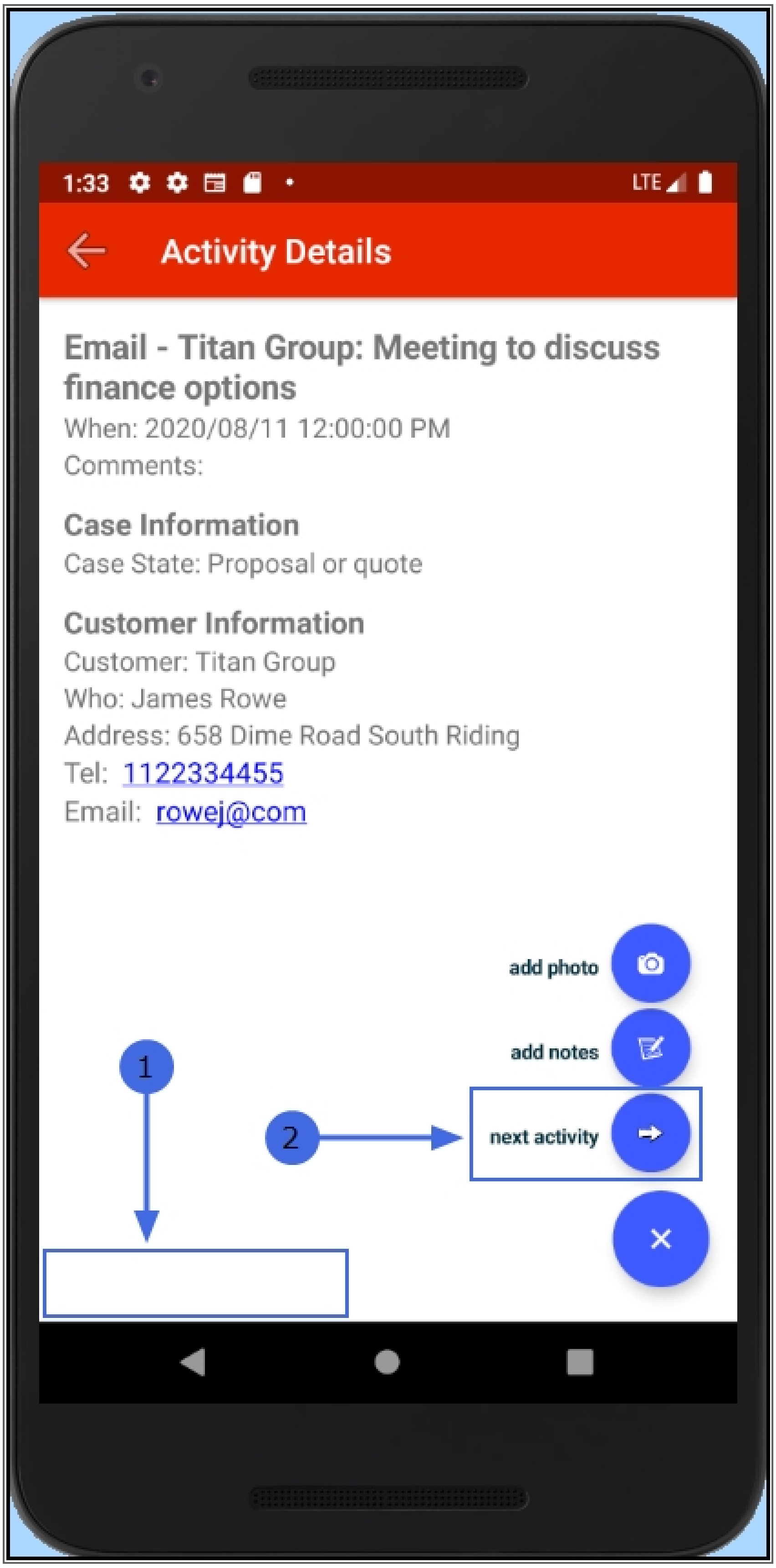
1. The button will now be replaced with the **End Activity** button.
2. If you tap on the expand **[+]** button, you will note that the **reschedule activity** button is no longer available. This is because the activity has already started, it can no longer be rescheduled. You are still able to link **Notes** and /or **Photos** to this activity.


11:36
LTE
Activity Details
Email - Titan Group: Meeting to discuss finance options
When: 2020/08/11 12:00:00 PM
Comments:
Case Information
Case State: Proposal or quote
Customer Information
Customer: Titan Group
Who: James Rowe
Address: 658 Dime Road South Riding
Tel: 1122334455
Email: rowej@com
2
add photo
add notes
1
END ACTIVITY

END ACTIVITY / NEXT ACTIVITY BUTTON

If you tap on the **End Activity** button, the screen will **refresh**,

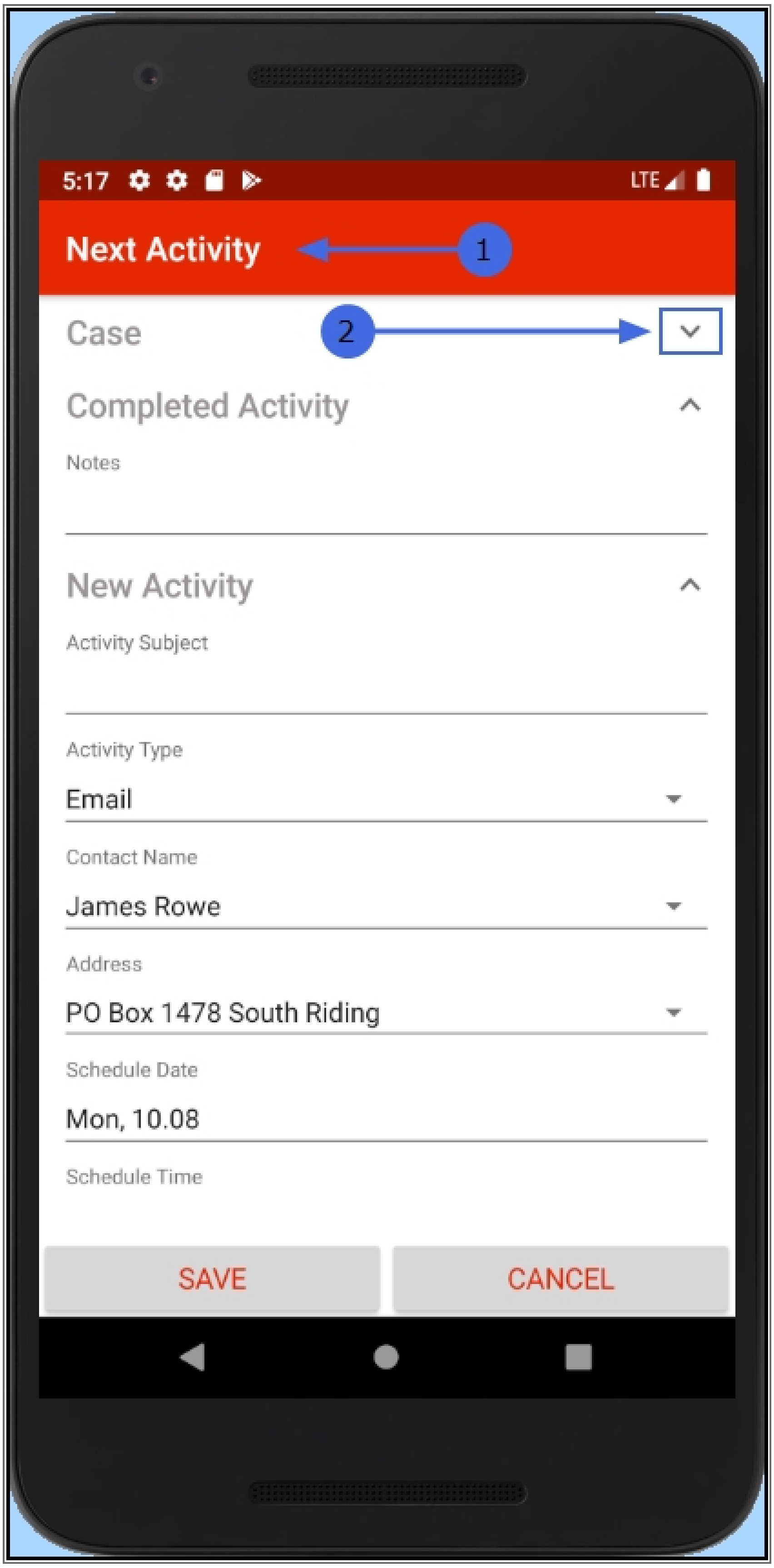
1. the button will disappear and
2. the **[+]** button will automatically expand to display a new **Next Activity** button. Tap on this button.


1:33
LTE
Activity Details
Email - Titan Group: Meeting to discuss finance options
When: 2020/08/11 12:00:00 PM
Comments:
Case Information
Case State: Proposal or quote
Customer Information
Customer: Titan Group
Who: James Rowe
Address: 658 Dime Road South Riding
Tel: 1122334455
Email: rowej@com
add photo
add notes
1
2
next activity

The Next Activity Screen

The **Next Activity** screen will be displayed. All the fields except the Case section are editable.

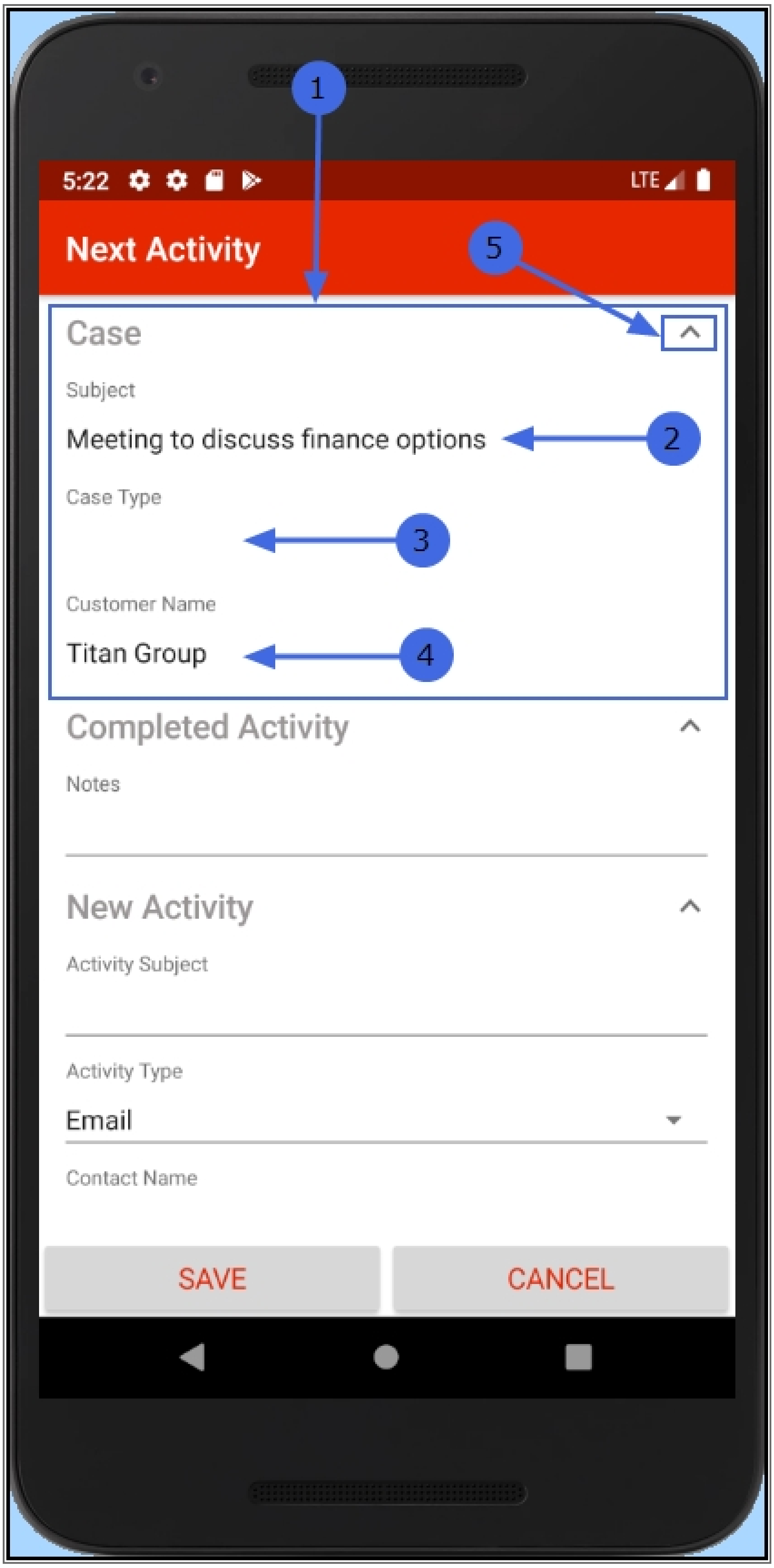
Case: tap on the drop-down arrow to expand this section.


5:17
LTE
Next Activity
1
Case
2
Completed Activity
Notes
New Activity
Activity Subject
Activity Type
Email
Contact Name
James Rowe
Address
PO Box 1478 South Riding
Schedule Date
Mon, 10.08
Schedule Time
SAVE
CANCEL

1. The expanded Case section will now display:
2. the **Case Subject**
3. the **Case Type** and
4. the **Customer Name**

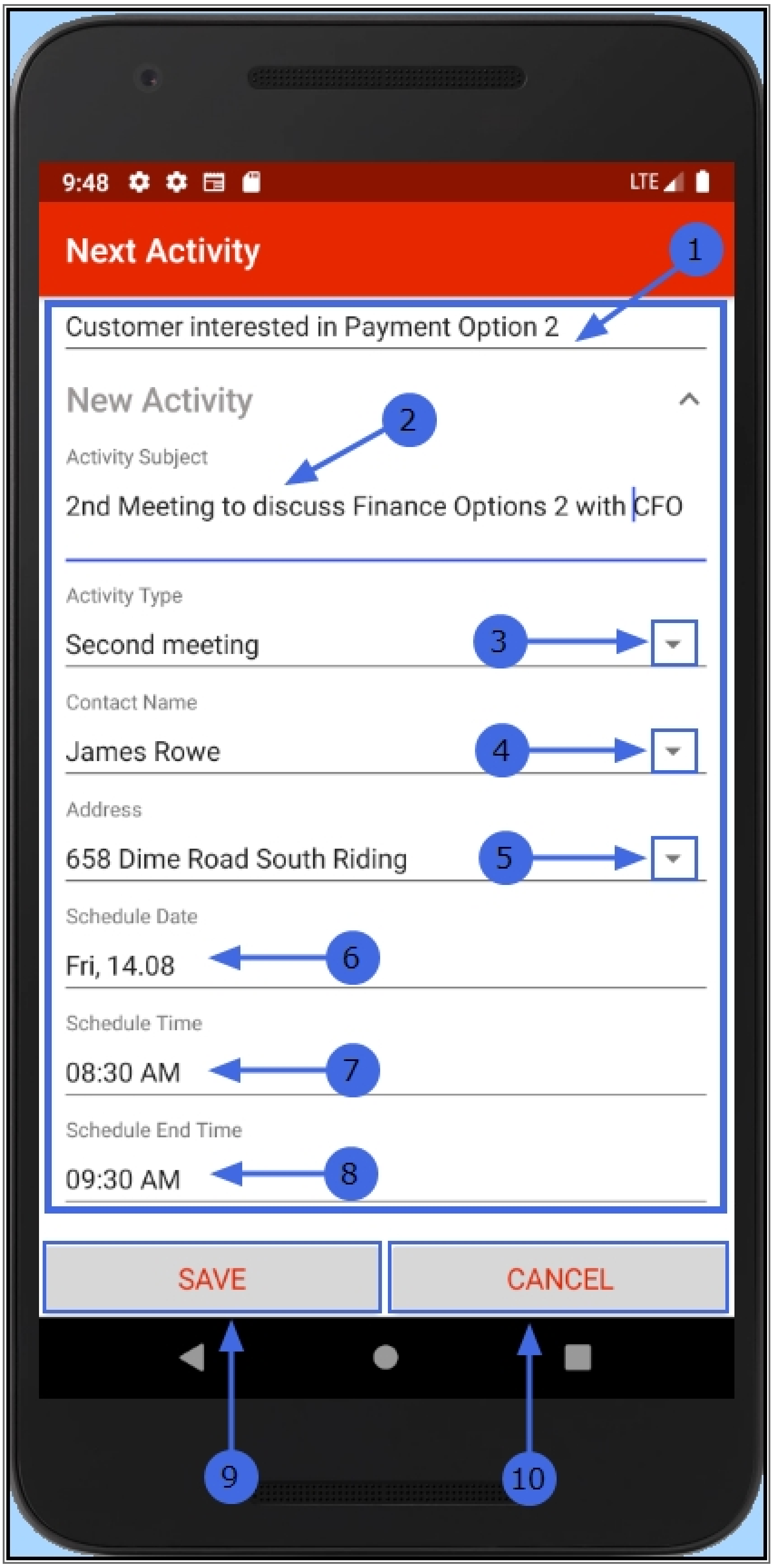
These fields are populated from information entered into **CRM** and are uneditable in **Sales Connect**.

5. **Collapse** the section when you have finished looking at it, to enable you to view and edit the remaining sections.

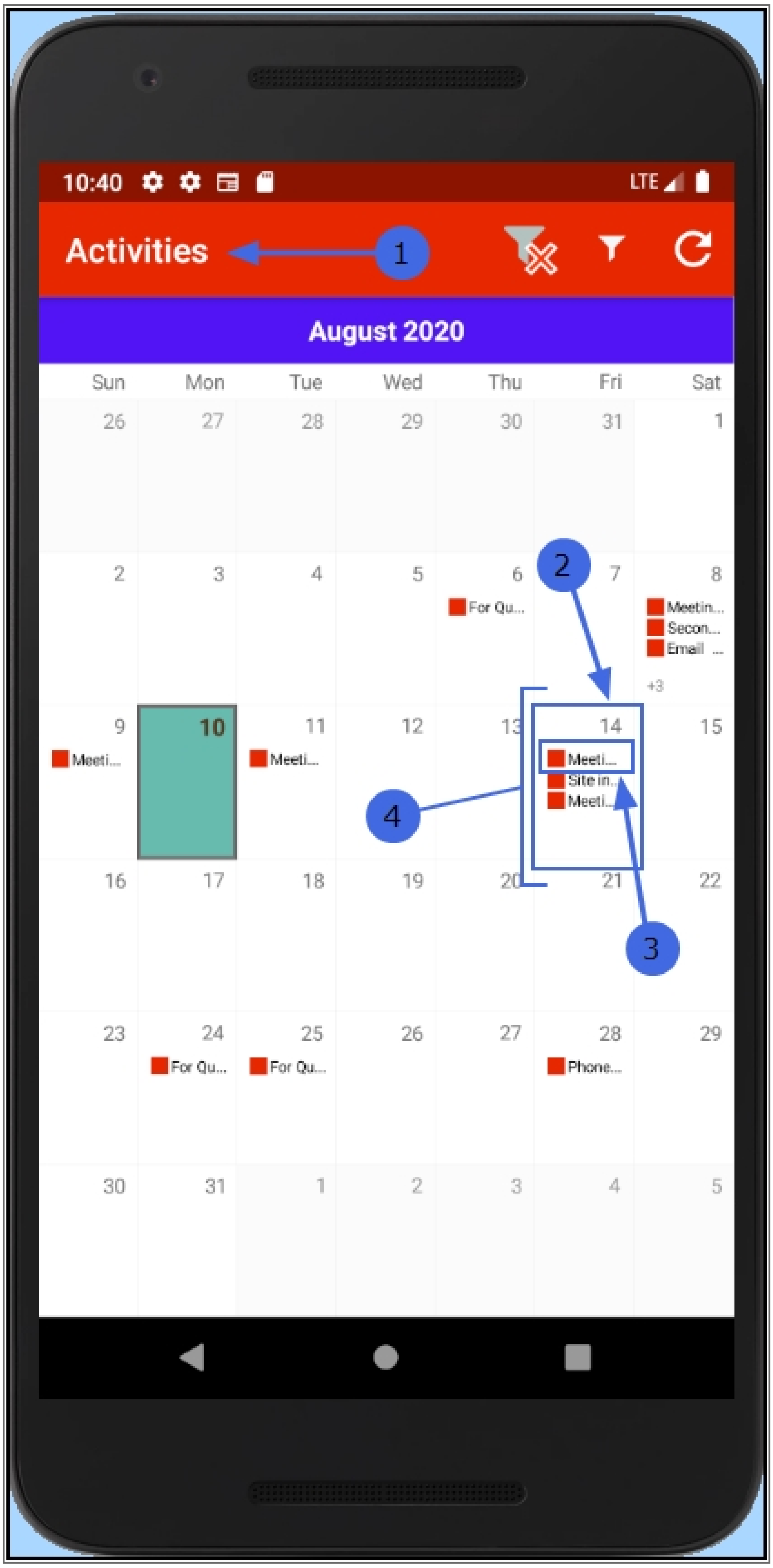

5:22
LTE
Next Activity
1
5
Case
Subject
Meeting to discuss finance options
2
Case Type
3
Customer Name
Titan Group
4
Completed Activity
Notes
New Activity
Activity Subject
Activity Type
Email
Contact Name
SAVE
CANCEL

1. **Completed Activity**: Type in a note regarding the **outcome** of the completed activity, (for example any progress made).
2. **New Activity**: Type in a brief description regarding the **subject** of next activity.
3. **Activity Type**: Tap on the drop-down arrow and select from the menu, the **type** of this next activity.
4. **Contact Name**: Tap on the drop-down arrow and select from the menu, the **contact** you wish to link to this next activity.
5. **Address**: Tap on the drop-down arrow and select from the menu, the **address** you wish to link to this next activity.
6. **Schedule Date**: Tap on the date already populated in this field, to display the Calendar function. Select the **date** for the next activity.
7. **Schedule Time**: Tap on the time already populated in this field, to display the Clock function. Select the **start time** for the next activity.
8. **Schedule End Time**: Tap on the time already populated in this field, to display the Clock function. Select the **end time** for the next activity.
9. If you are happy with your changes, tap on **Save**,
10. or tap on **Cancel** to return to the Activity Details screen.

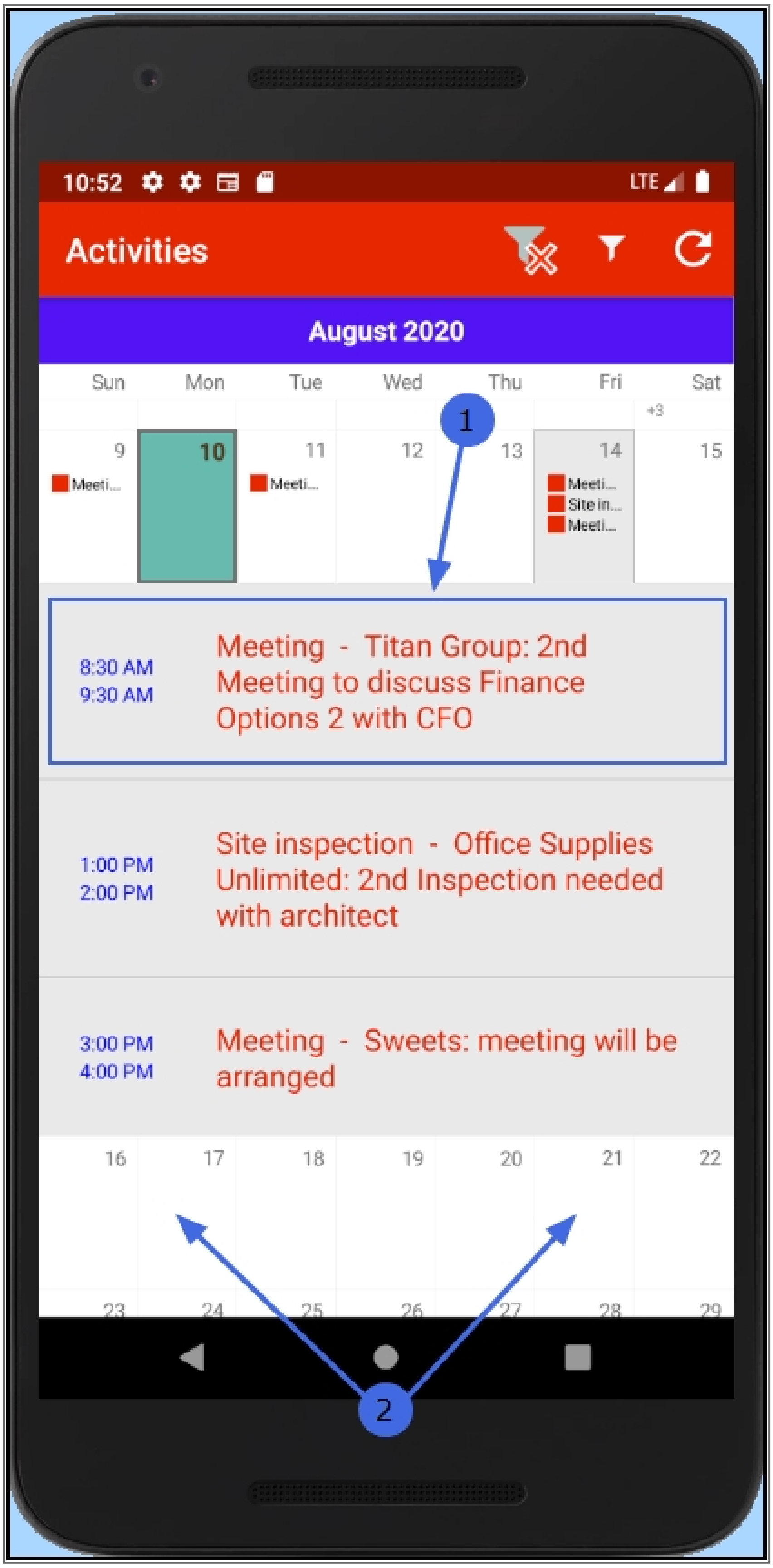
For the purpose of this manual, **Save** is selected.


9:48
LTE
Next Activity
1
Customer interested in Payment Option 2
New Activity
2
Activity Subject
2nd Meeting to discuss Finance Options 2 with CFO
Activity Type
Second meeting
3
Contact Name
James Rowe
4
Address
658 Dime Road South Riding
5
Schedule Date
Fri, 14.08
6
Schedule Time
08:30 AM
7
Schedule End Time
09:30 AM
8
SAVE
CANCEL
9
10

1. The screen will refresh and the **Activities** screen will be displayed.
2. In the calendar, navigate to the **date** you selected for the new activity.
3. A new **red square** with the new **Activity Type** can be seen in this date.
4. Tap on the date.


10:40
LTE
Activities
1
August 2020
Sun
Mon
Tue
Wed
Thu
Fri
Sat
2
3
4
For Qu...
Meetin...
Secon...
Email ...
+3
Meeti...
Meeti...
Site in...
Meeti...
For Qu...
For Qu...
Phone...

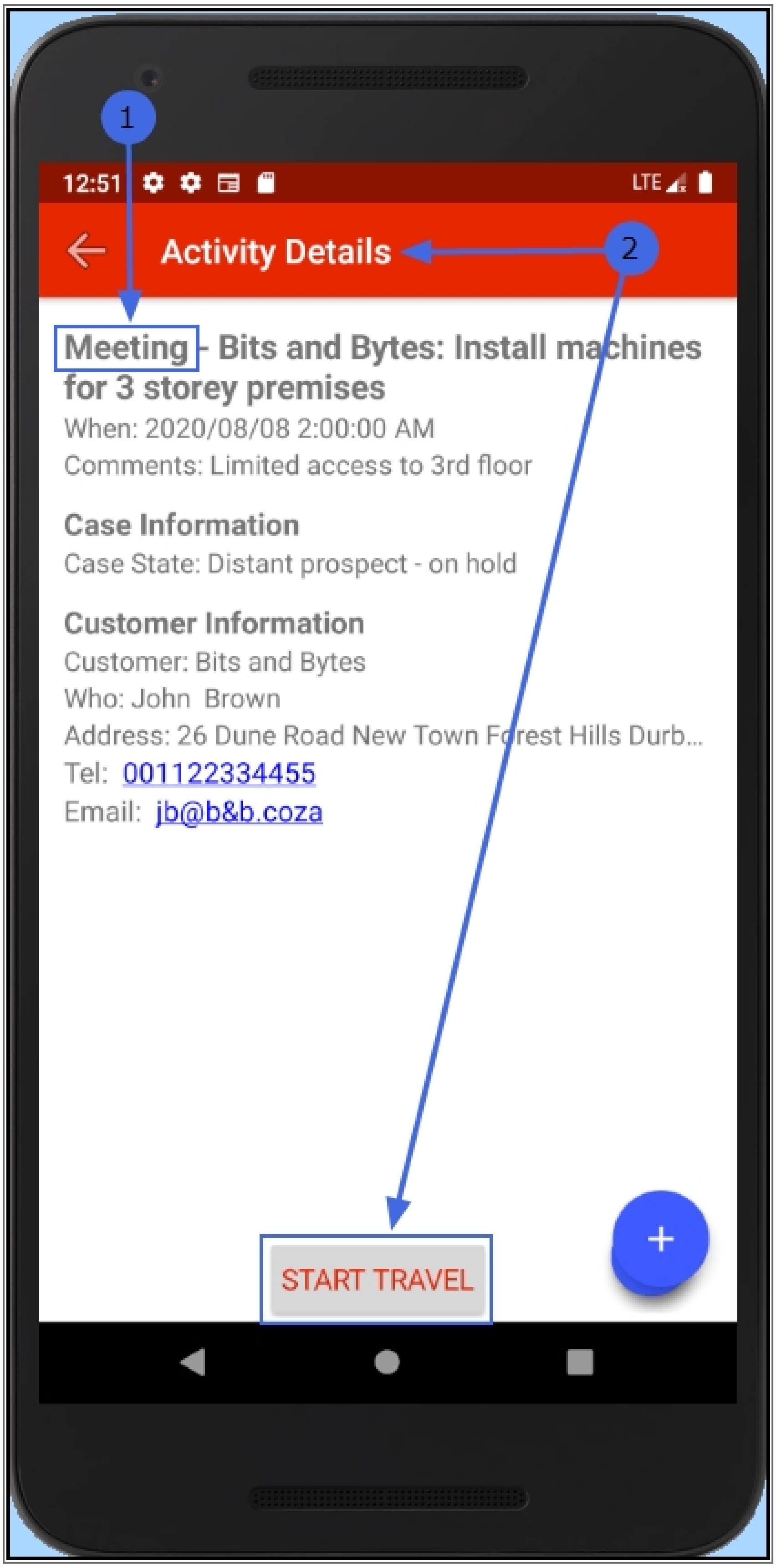
1. A 'quick view' of the new activity will pop up. It has been successfully added to the calendar.
2. Tap anywhere on the calendar, outside of the 'quick view' text box, to return to the **Activities** screen.


10:52
LTE
Activities
August 2020
Sun
Mon
Tue
Wed
Thu
Fri
Sat
+3
1
9
10
11
12
13
14
15
Meeti...
Meeti...
Meeti...
Site in...
Meeti...
8:30 AM
9:30 AM
Meeting - Titan Group: 2nd Meeting to discuss Finance Options 2 with CFO
1:00 PM
2:00 PM
Site inspection - Office Supplies Unlimited: 2nd Inspection needed with architect
3:00 PM
4:00 PM
Meeting - Sweets: meeting will be arranged
16
17
18
19
20
21
22
23
24
25
26
27
28
29
2

THE START TRAVEL BUTTON

Sales Connect allows you to link **travel time** directly to your **Meeting** activities.

1. Firstly, ensure that you have selected a **Meeting** activity.
2. In the Activity Details screen, tap on the **Start Travel** button.


12:51
LTE
Activity Details
1
2
Meeting - Bits and Bytes: Install machines for 3 storey premises
When: 2020/08/08 2:00:00 AM
Comments: Limited access to 3rd floor
Case Information
Case State: Distant prospect - on hold
Customer Information
Customer: Bits and Bytes
Who: John Brown
Address: 26 Dune Road New Town Forest Hills Durb...
Tel: 001122334455
Email: jb@b&b.coza
START TRAVEL
+

The Start Travel Screen

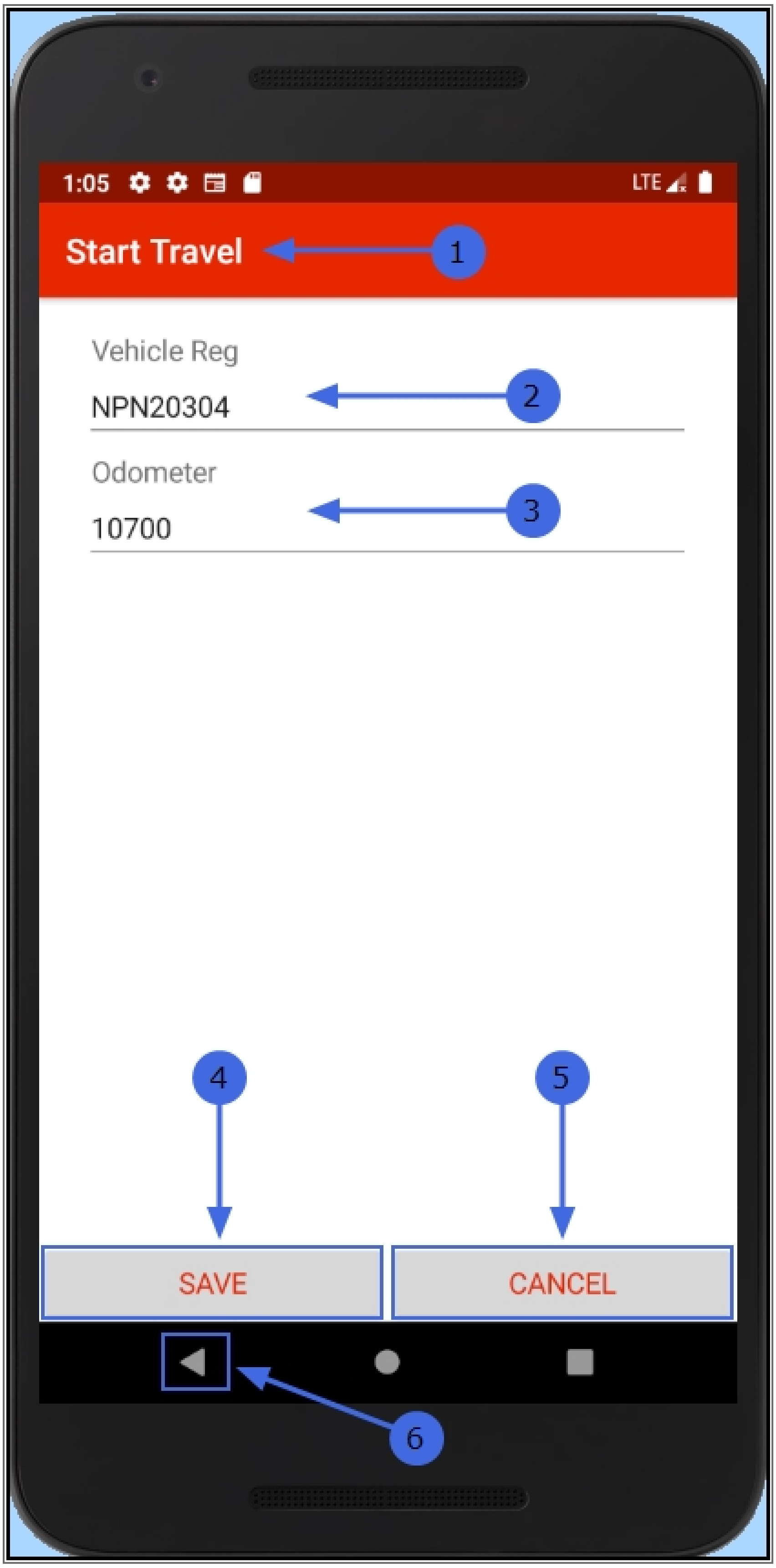
1. The **Start Travel** screen will open.

   Type in:

2. your **vehicle registration number** and
3. your **odometer start reading** and
4. Either, select to **Save** the details,
5. Or, tap on **Cancel** to void any changes and return to the Activity Details screen.

For more information refer to Activity Start Travel.

6. Click on **Back** to return to the **Activity Details** screen.


1:05
LTE
Start Travel
1
Vehicle Reg
NPN20304
2
Odometer
10700
3
4
5
SAVE
CANCEL
6

Related Topics

- Sales Connect - Introduction and Index
- Sales Connect - Download and Log In / Out
- Sales Connect - Edit Activity Details
- Sales Connect - Add Image / Photo to an Activity
- Sales Connect - Add Notes to an Activity
- Sales Connect - Link Start and End Travel to an Activity
- CRM

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