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

SALES CONNECT

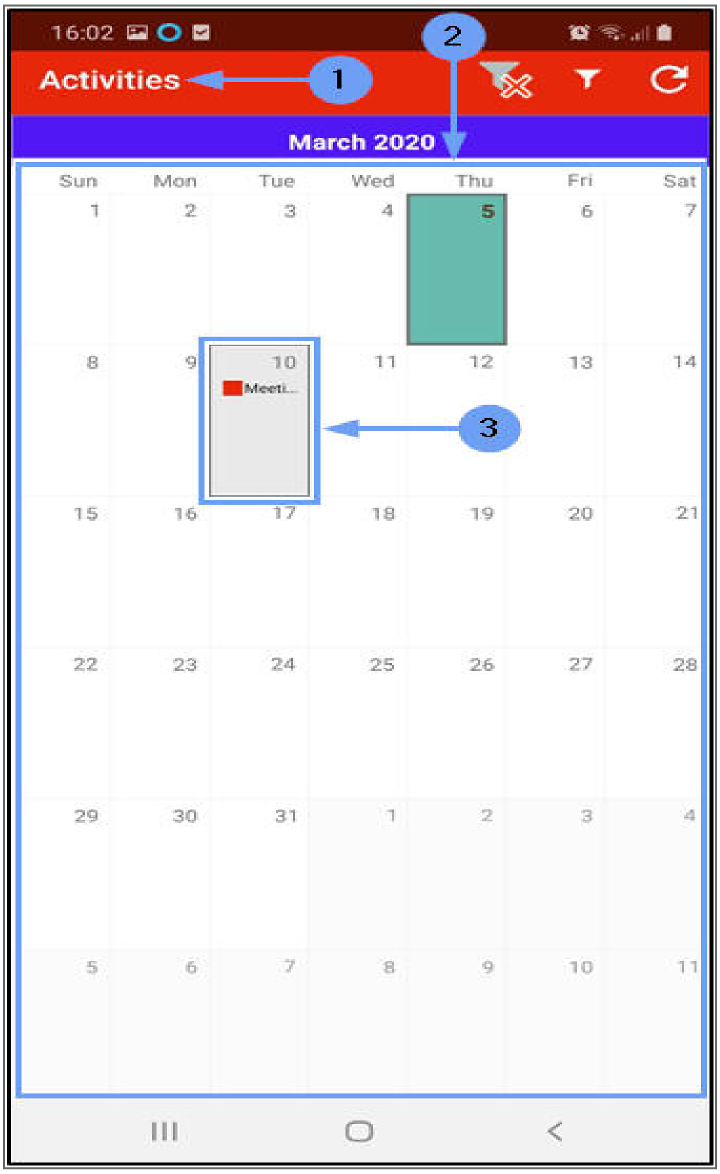
ADD NOTES / COMMENTS TO AN ACTIVITY

You can link notes directly to an activity in Sales Connect. These notes will pull through to CRM where they can be viewed and deleted or edited. Any changes made in CRM or in Sales Connect will reflect in the other respective application.

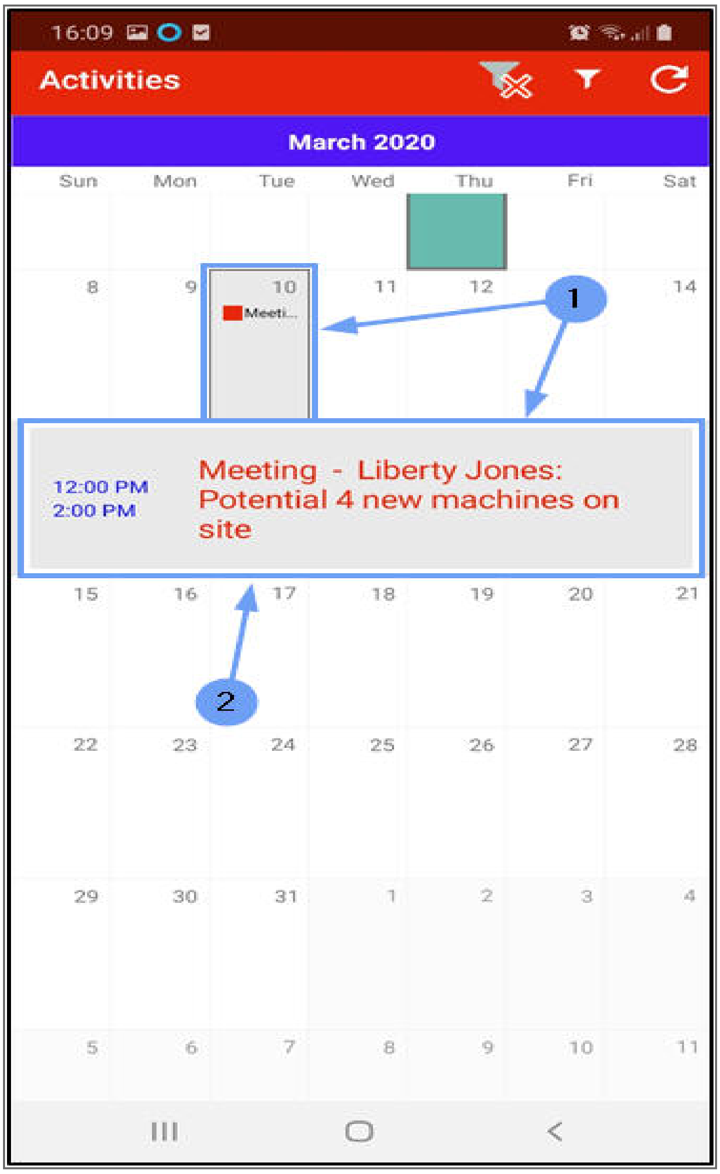
[Watch the video]

SELECT THE ACTIVITY

1. After initial login to Sales Connect 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.
3. Tap on the **date** that contains the Activity that you wish to link a **note** to.

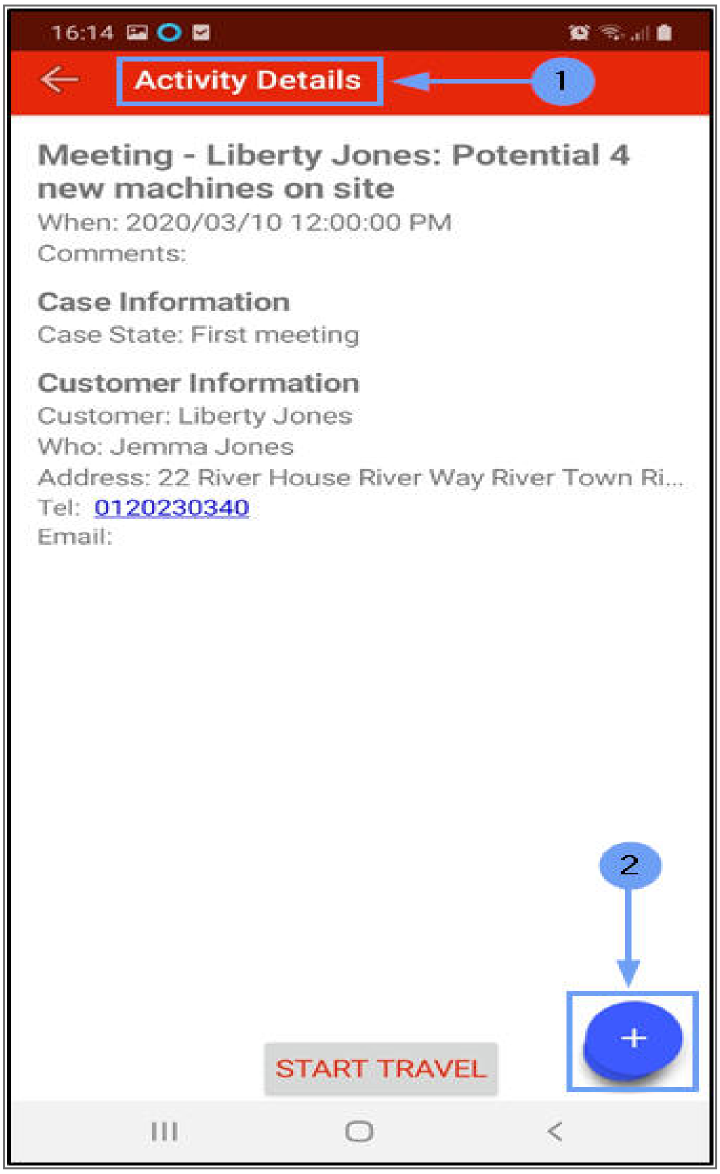


1. A **text box** will pop up with more information regarding the activity.
2. Tap on this text box.



THE ACTIVITY DETAILS SCREEN

1. The **Activity Details** screen will be displayed.
2. Tap on the **Expand** icon.

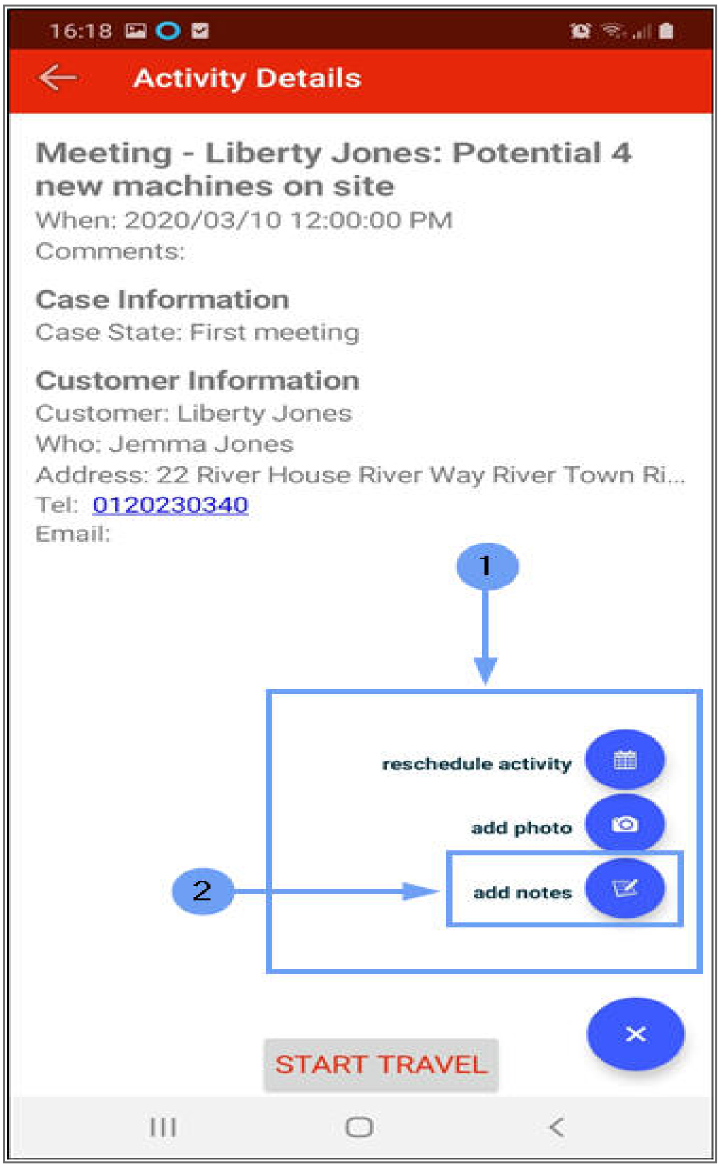


THE ACTIVITY EDIT BUTTONS

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

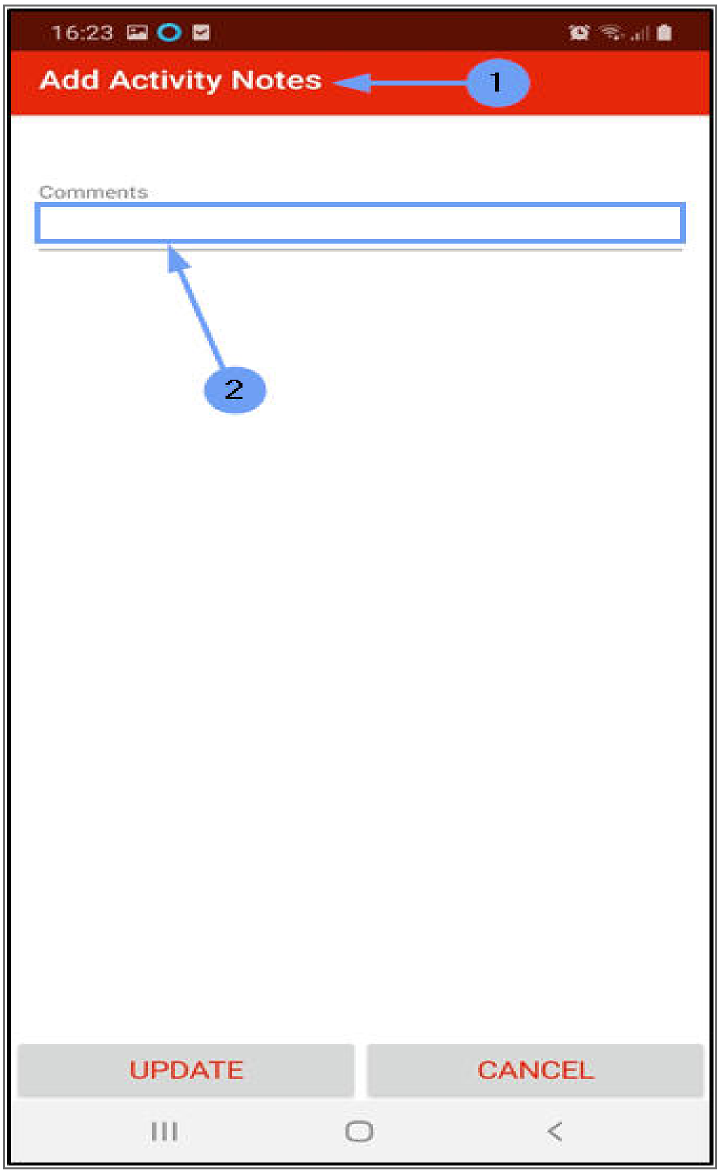
ADD NOTE

2. Tap on **add notes**.



THE ADD ACTIVITY NOTES SCREEN

1. The **Add Activity Notes** screen will open.
2. Tap in the **Comments** section.



1. Your device's **keyboard** will display on the screen.
2. A **cursor** will appear in the Comments section.

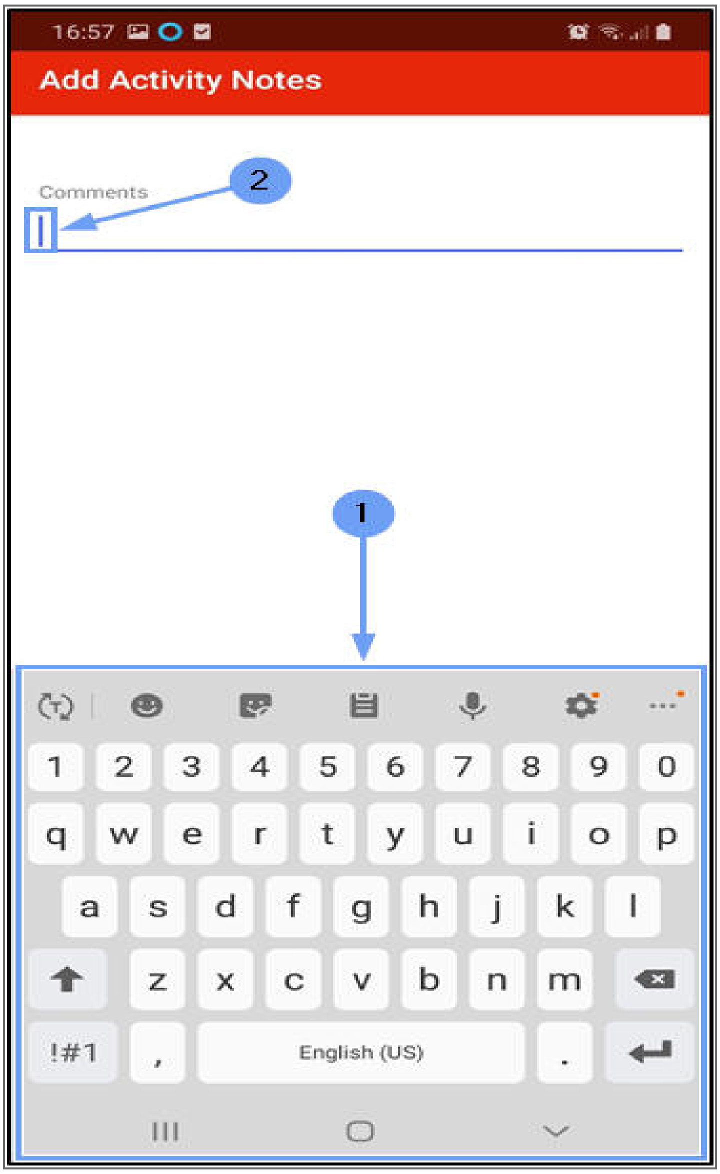
You can now start typing in your note.

NOTES (COMMENTS) CONTENT

Notes (comments) can be:

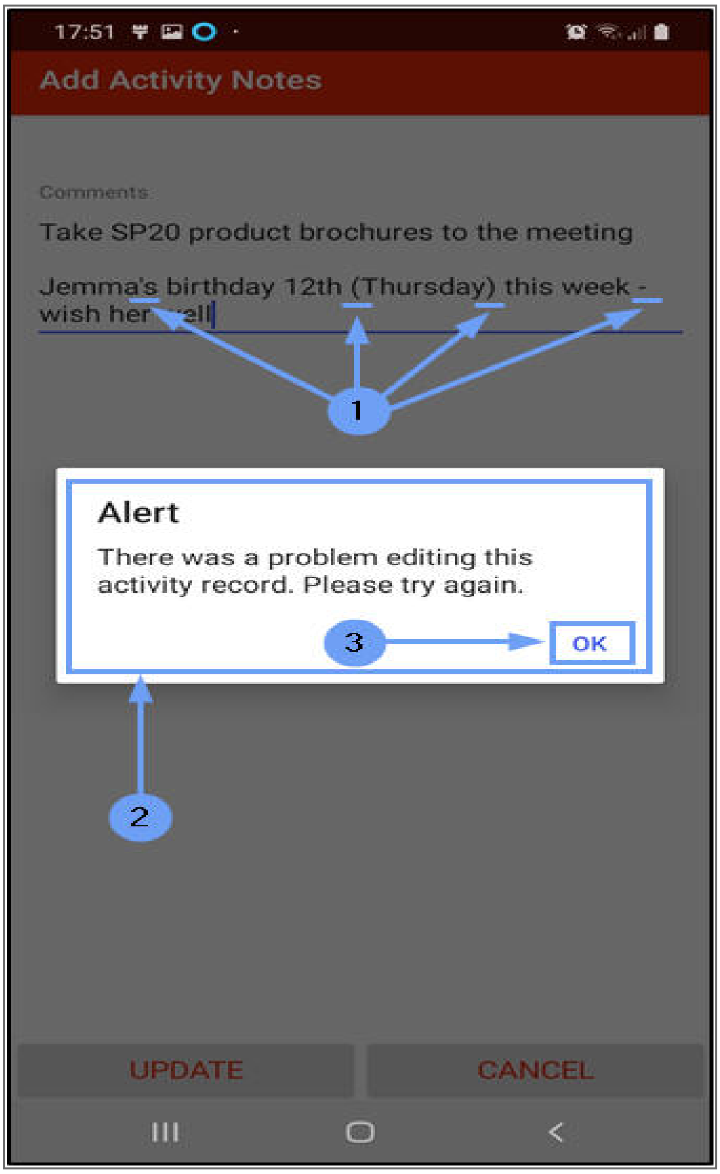
i. Related directly to the Activity:
   - **e.g.** "Take SP20 product brochures to the meeting"

ii. Of a more personal nature - to prompt you to build good relationship with your customer:
   - **e.g.** "[Customer's name] birthday this week. Be sure to acknowledge this"



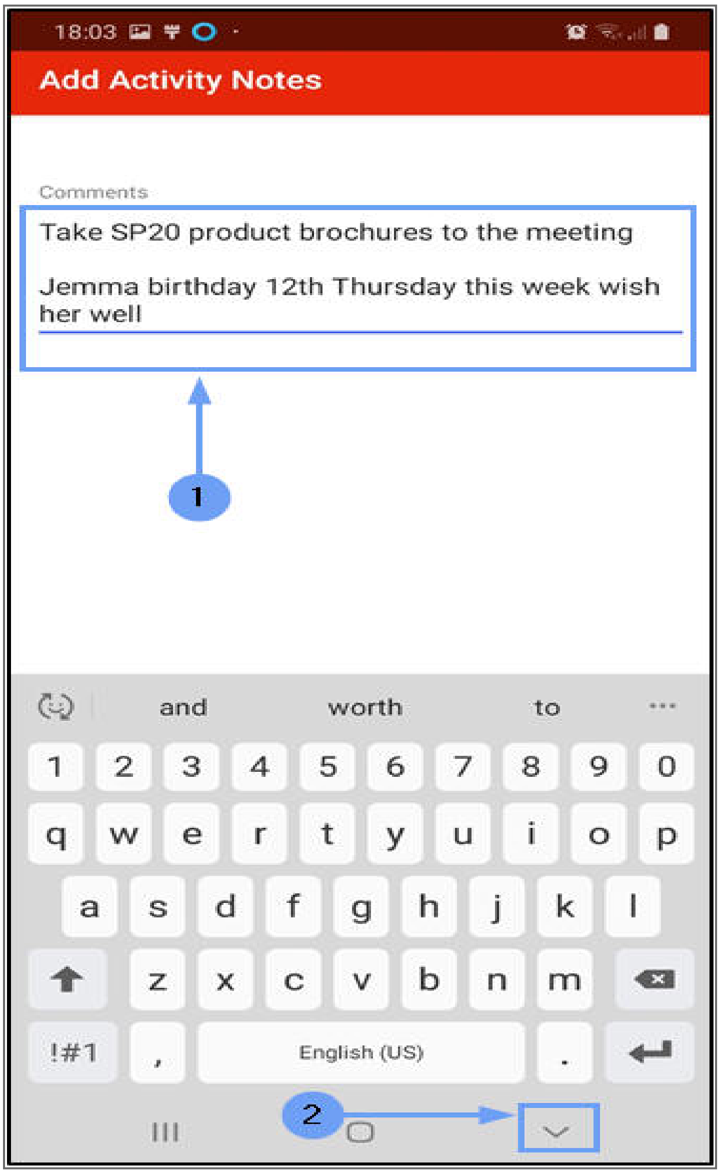
Note Content Alert

1. Comments cannot contain text other than letters and numbers.
2. Any other text symbols and characters will cause this **Alert** error to appear on the screen when you try to **save/update** the note.
3. Tap on **OK** and then **delete** the unsupported characters in your Comments section.



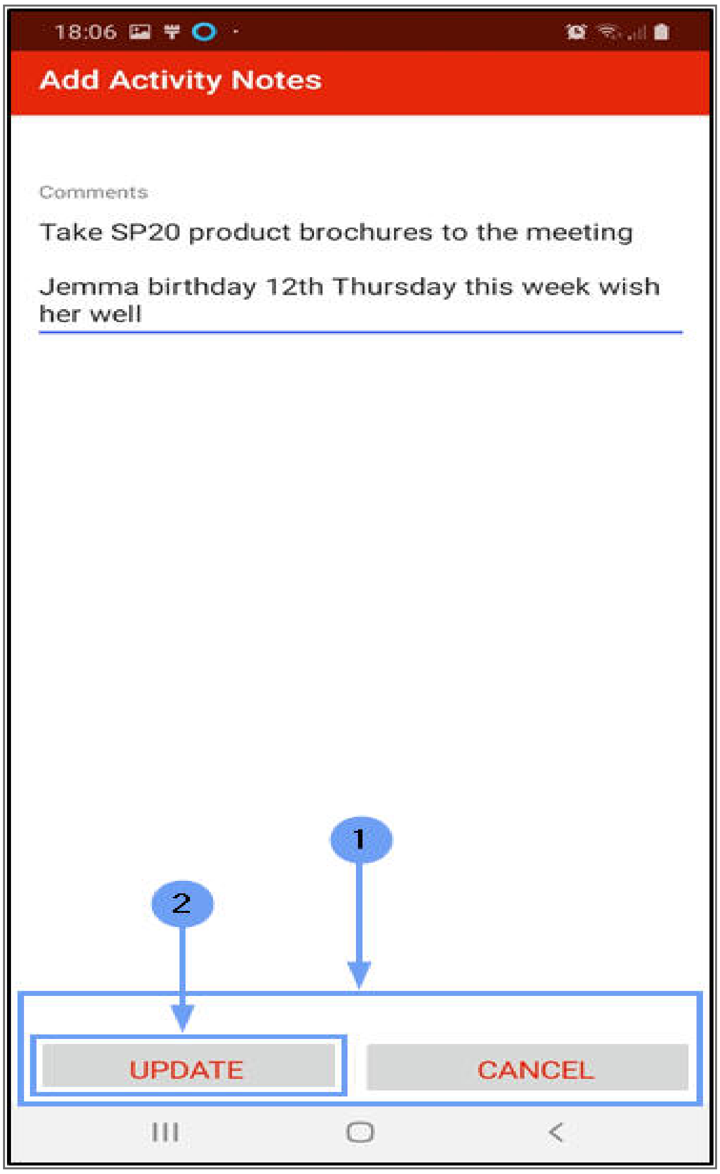
CLOSE THE KEYPAD

1. When you have finished adding the Note (Comment) (and have removed any unsupported characters),
2. **Close** the device keyboard.



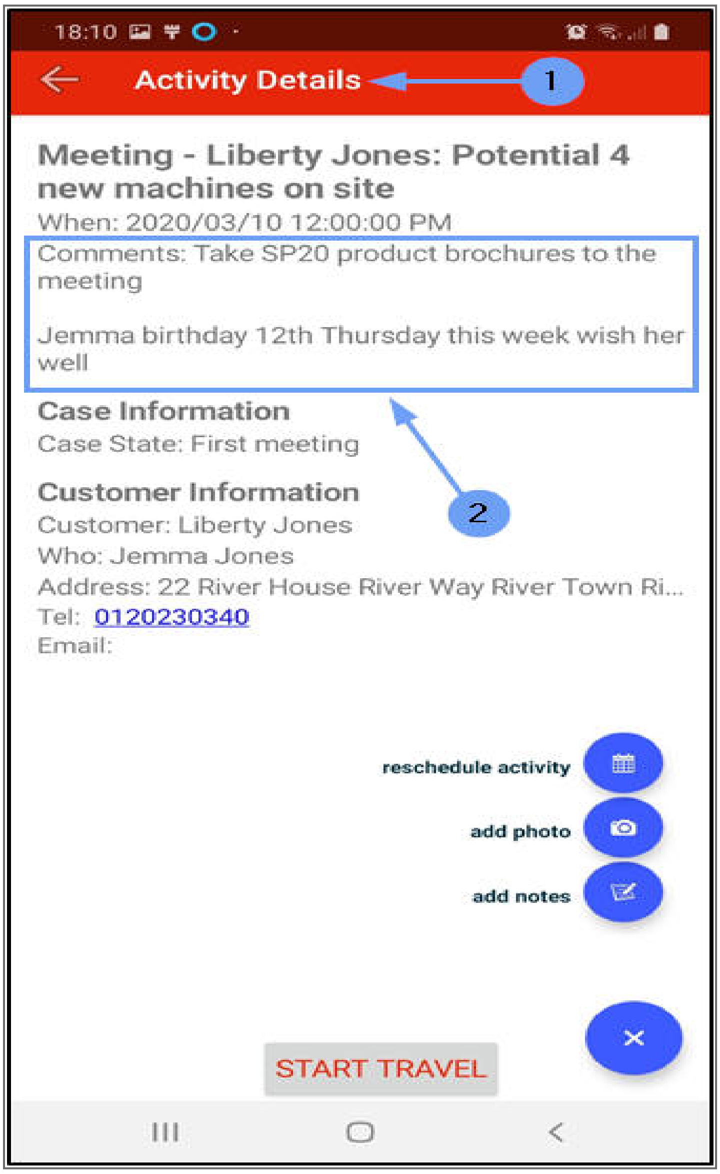
SAVE / UPDATE NOTES

1. You will be able to view the **Update** and **Cancel** buttons again.
2. Tap on **Update**.



VIEW NOTES IN THE ACTIVITY DETAILS SCREEN

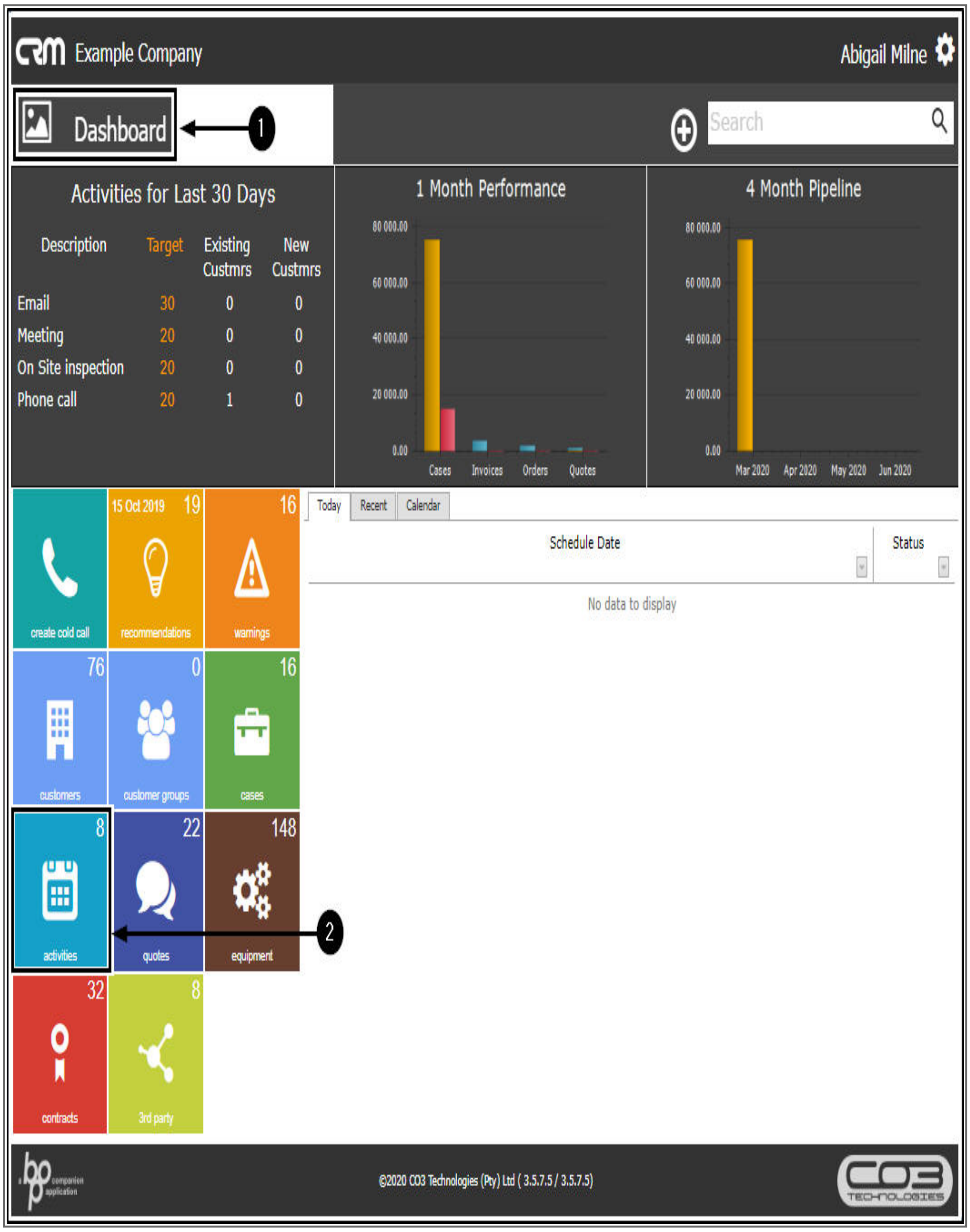
1. You will return to the Activity Details screen.
2. The added notes can now be viewed in the **Comments** section.



VIEW ACTIVITY NOTES IN CRM

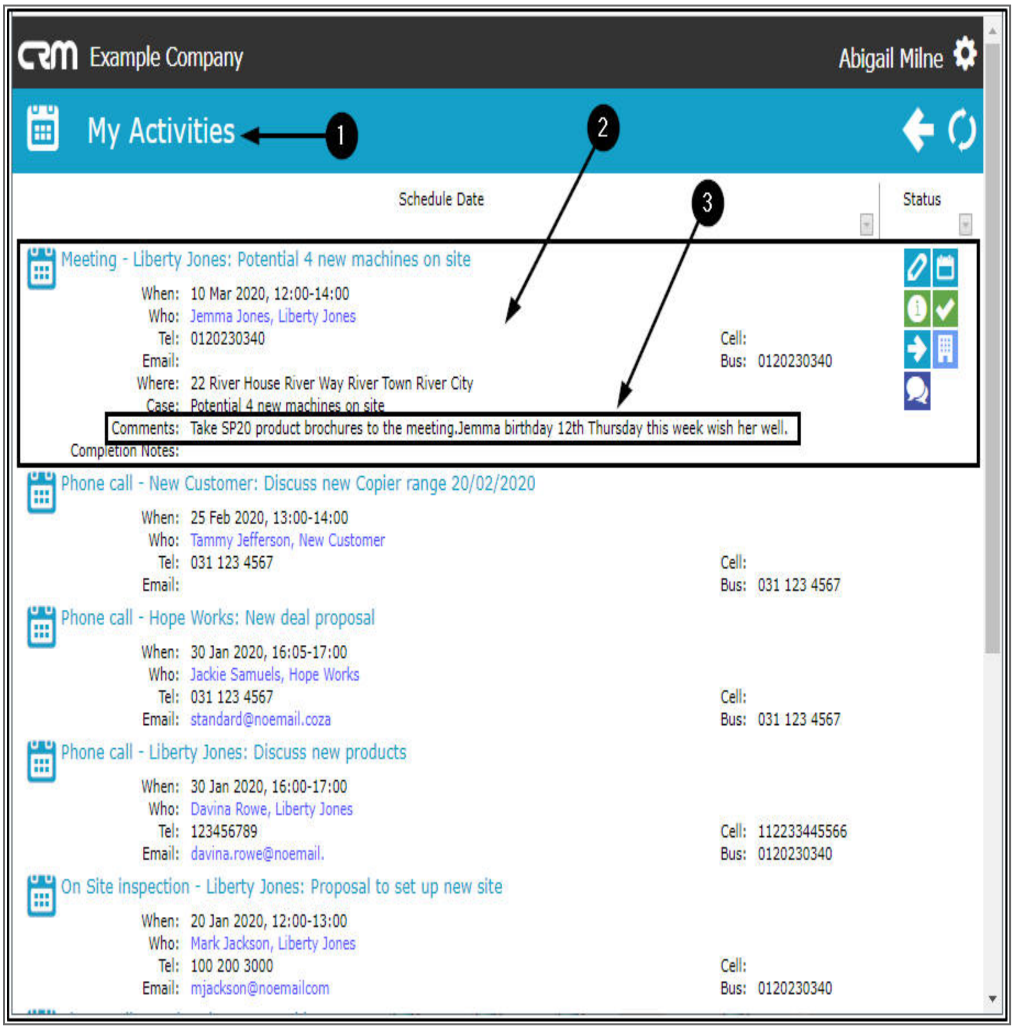
These notes will pull through to your **CRM**.

1. In your CRM **Dashboard**,
2. click on the **Activities** tile.



1. The **My Activities** page will open.
2. Single click anywhere on the <u>same</u>**Activity** that you added the note to.

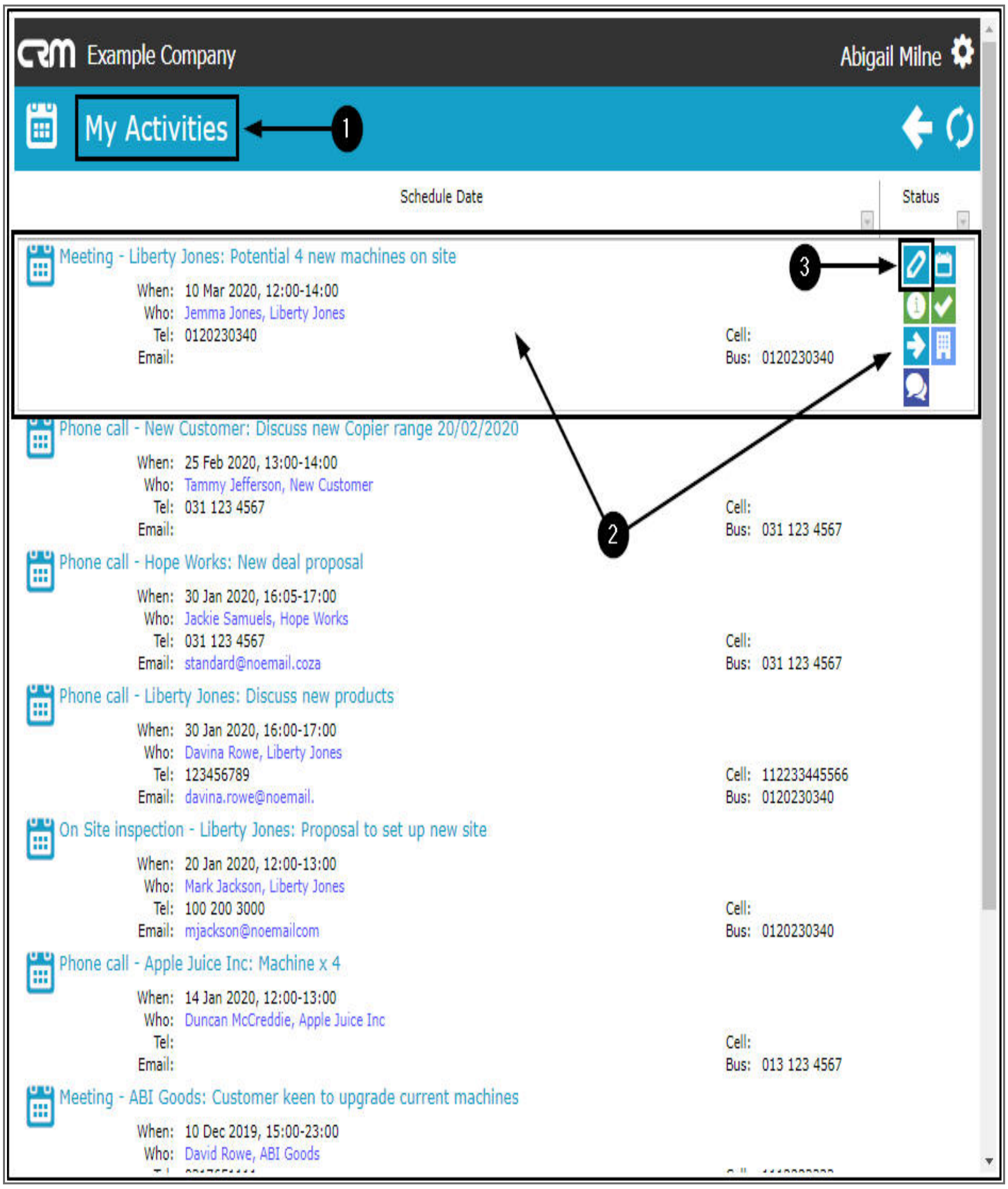
3. The Activity frame will expand to display the **Comments** section. Here you can view the added note.



EDIT ACTIVITY NOTES IN CRM

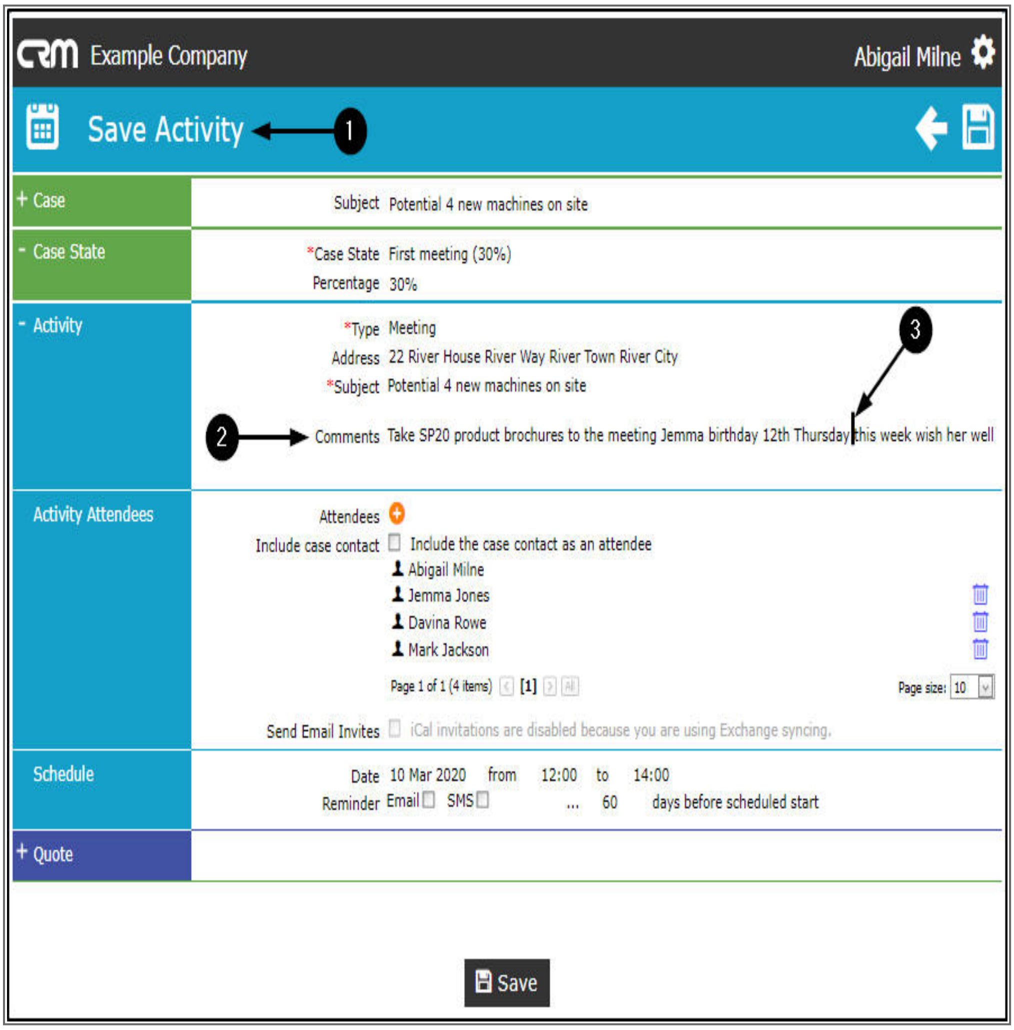
You can edit these Activity notes directly in **CRM** but for any changes to reflect in **Sales Connect**, you will need to go to the Activities screen in your device and tap on **Refresh**.

1. In the **My Activities** page,
2. Hover over the same Activity that you added the note to, until the **Action Buttons** appear.
3. Click on the **View/Edit this Activity** button.



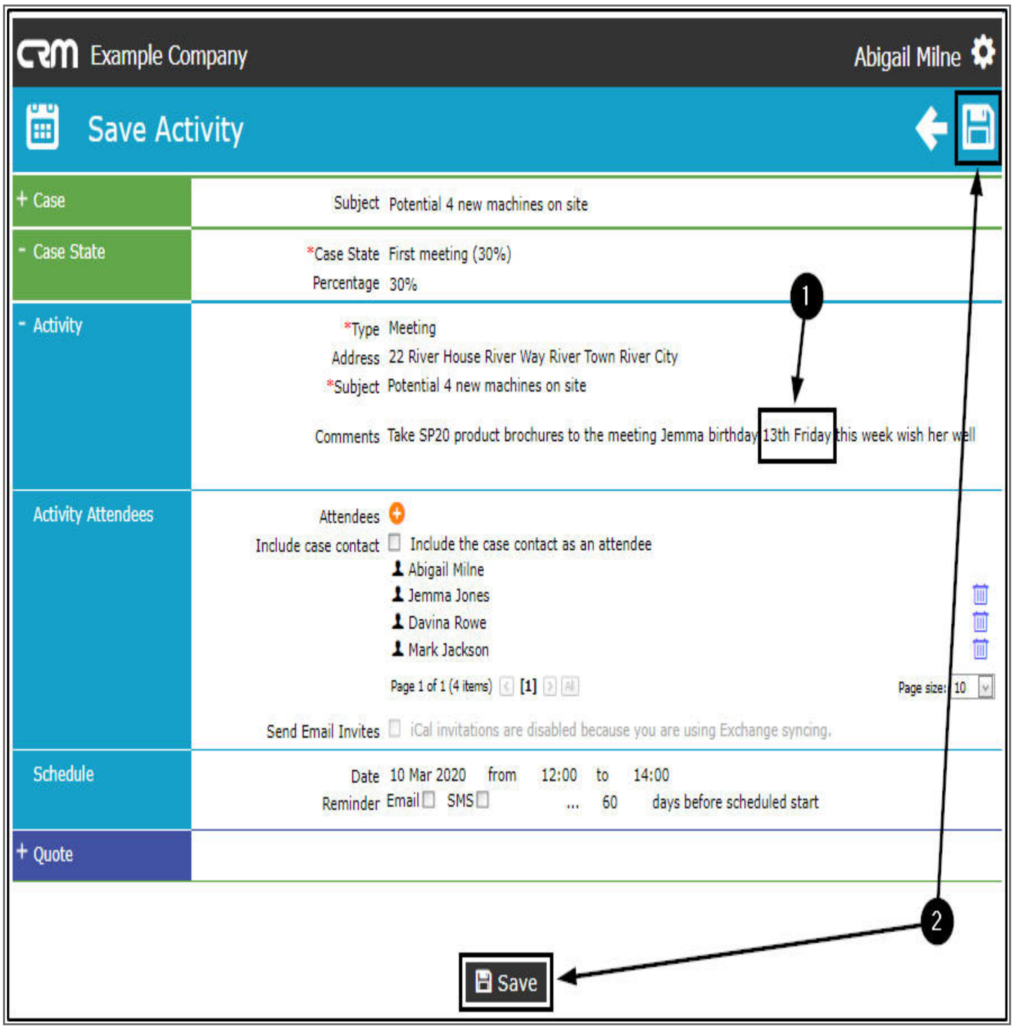
1. The **Save Activity** page will open.
2. Go to the **Comments** section.

3. Place your cursor next to the part of the comment that you wish to either add text to or remove text from.



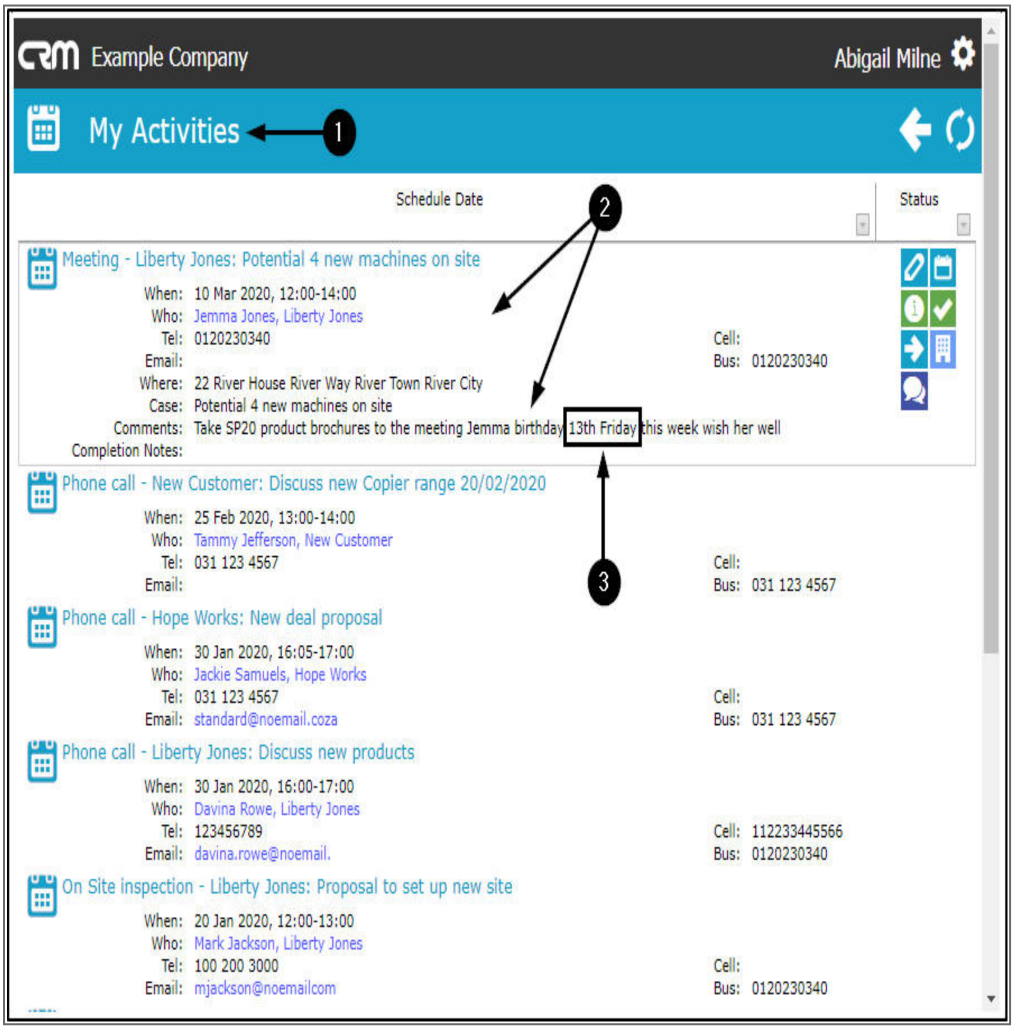
SAVE CHANGES

1. When you are happy with your changes (in this example, the **birth date** and **day** has been changed),
2. Click on **Save**.



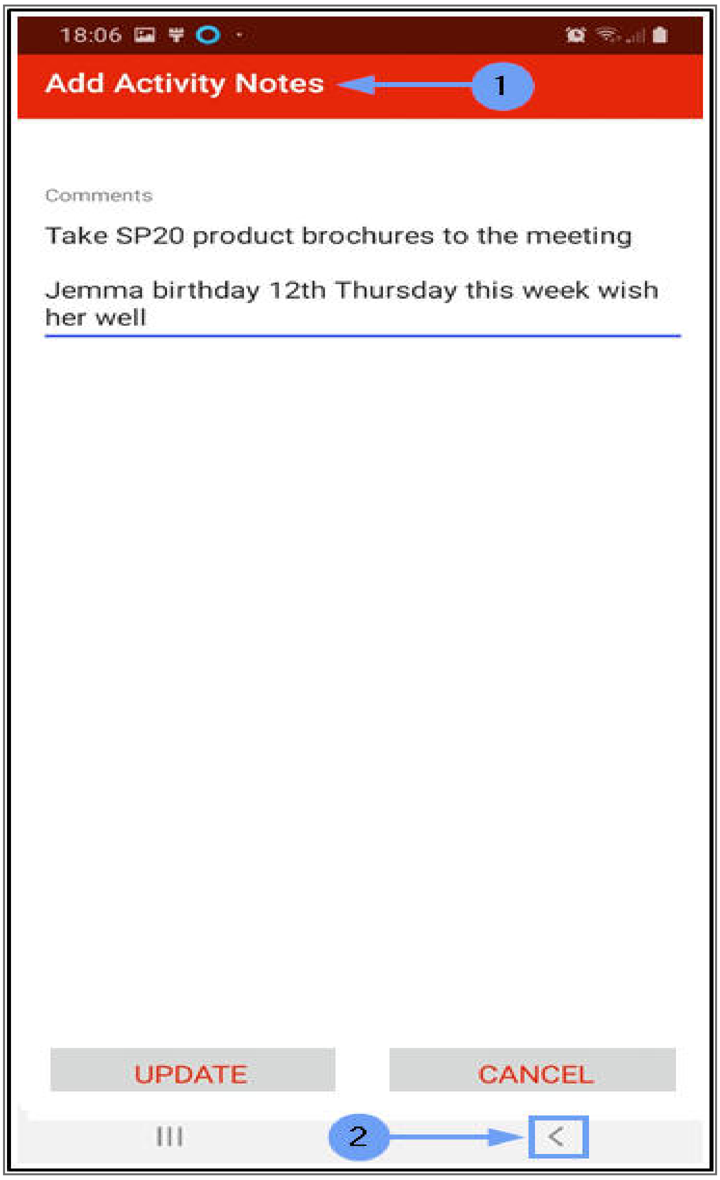
1. You will return to the **My Activities** page.
2. Click on the Activity to expand the frame and display the **Comments** section.
3. You can see the contents have been updated.

Remember: To see these changes in Sales Connect, you will need to go to the Activities screen and tap on **Refresh**.

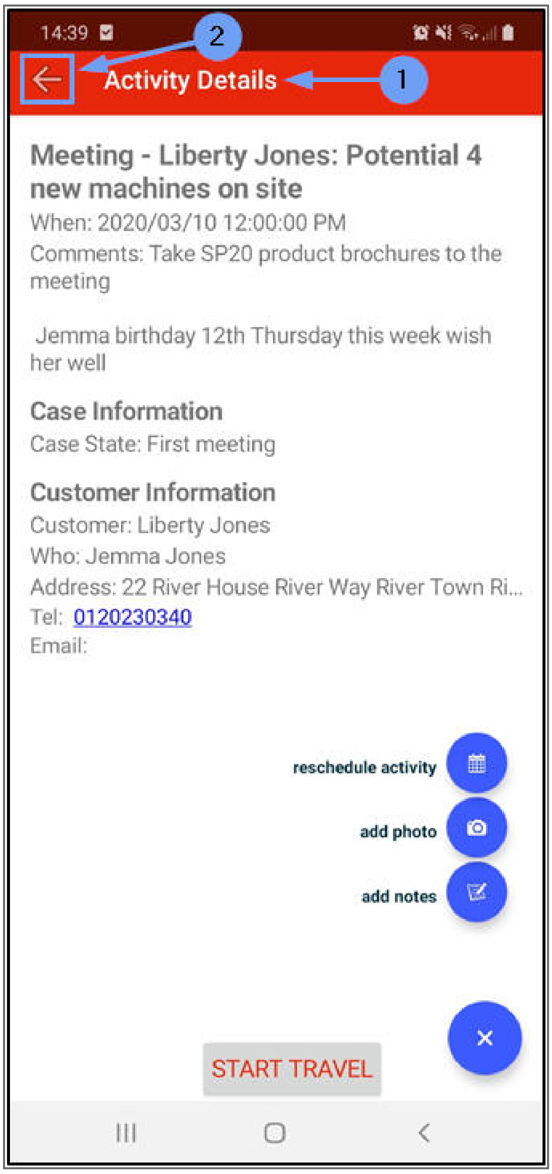


VIEW CHANGES IN SALES CONNECT

1. If you are already in the **Add Activity Notes** screen,
2. you will need to go **Back** to the **Activity Details** screen and then the **Activities** screen to be able to **Refresh** the app.

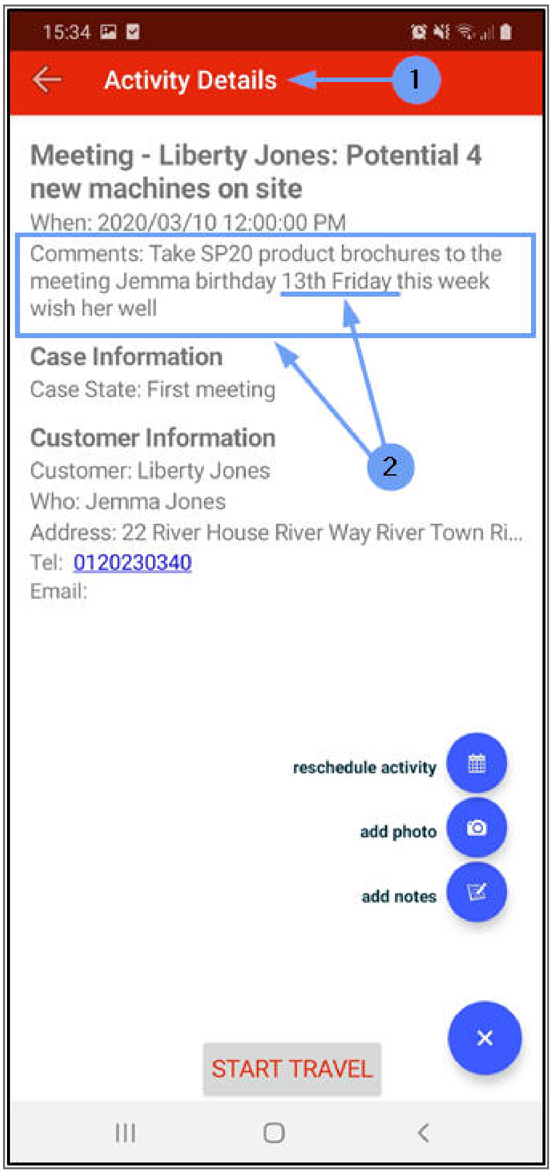


1. In the **Activity Details** screen,
2. tap on **Back** to return to the to the **Activities** screen.



1. In the **Activities** screen,
2. you can now tap on **Refresh** .

1. Navigate back to **Activity Details** screen.
2. The **Comments** will have updated to match the changes made in **CRM**.



Related Topics

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

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