

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

# CRM BASICS

## ADD / EDIT AN ACTIVITY

When creating a **new** activity from the Dashboard (Home page), you will also be creating a **new Case** for the Customer.

A Case can be seen as an umbrella over all the underlying activities that work towards achieving a contract with that customer.

If a Case and an Activity already exists for a customer, then you need to:

- View the current Activity
- Process the 'Next Action'
- Which will complete the current Activity and then
- Create a new Activity

There cannot be more than **1** open Activity at a time, per Case.

---

**Access:** Webpage - [http://\[servername\]:\[portno\]/BPOCRM/User.aspx](http://[servername]:[portno]/BPOCRM/User.aspx)

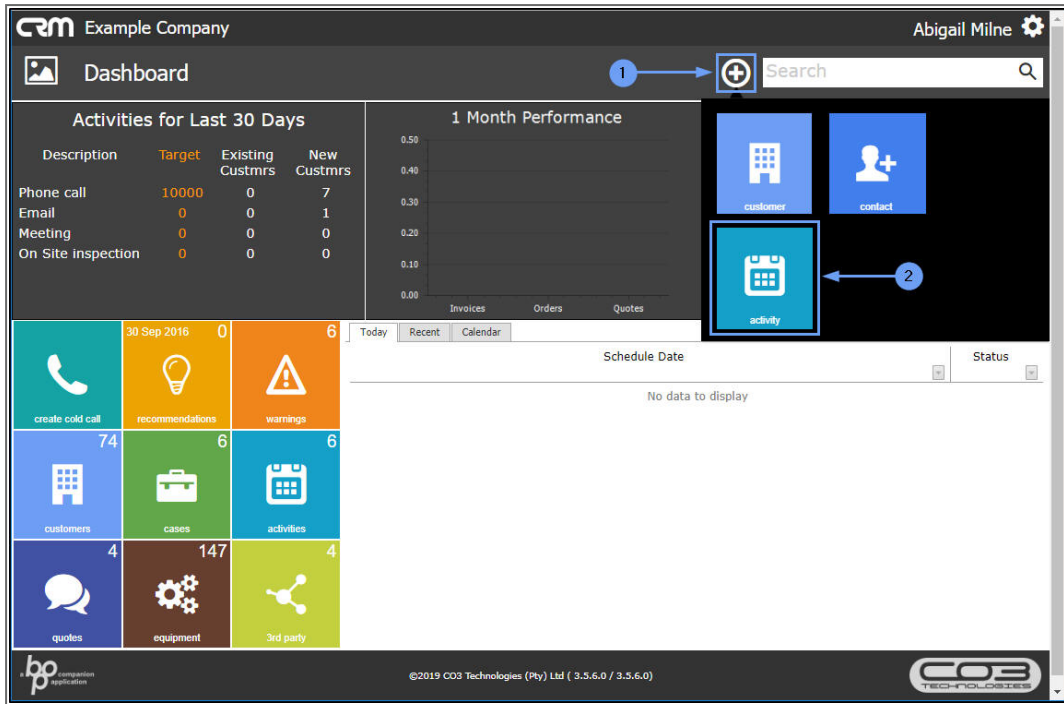
---

## CREATE NEW ACTIVITY

---

In the CRM **Homepage**,

1. Click on the **Add new items...** icon
2. Click on the **Activity** tile.



1. The **Save Activity** screen will be displayed.

## CASE DETAILS

2. Add details to the following fields:
  - Customer:** Click in this field to display a list of all the customers on the system. Select the relevant customer.
  - Contact:** Click in this field to display a list of all the contacts linked to the customer specified above. Select the applicable contact.
  - Salesman:** This will auto populate with the person currently logged on to the system
  - Subject:** Type in the subject of this case (e.g. **New product range cold call** ).
  - Information:** Type in any additional information pertinent to this case (e.g. **Review client requirements** ).

- Note:** Although this is not a mandatory field, it is an important one. A salesman may not always remember extra details specific to a customer. Here you can include any extra pertinent information that may help build good customer relationship which will help the salesman achieve / win this case.

1. **Value:** Type in the estimated value of this case.

**Case Type:** Click in this field to display a list of all the Case Types set up on the system (e.g. Machine Sales or New Deal). Select the relevant Case Type.

**Case Date:** This will auto populate with the current date.

- Either type in, or click on the drop-down arrow that appears and use the calendar function to

select the date of this case

**Source Type:** Click in this field to display a list of all the source types set up on the system (e.g. Referral, Google Ads - how you heard about this customer). Select the applicable source type.

**Expected Completion:** This will auto populate with the date 7 days after the auto populated case date.

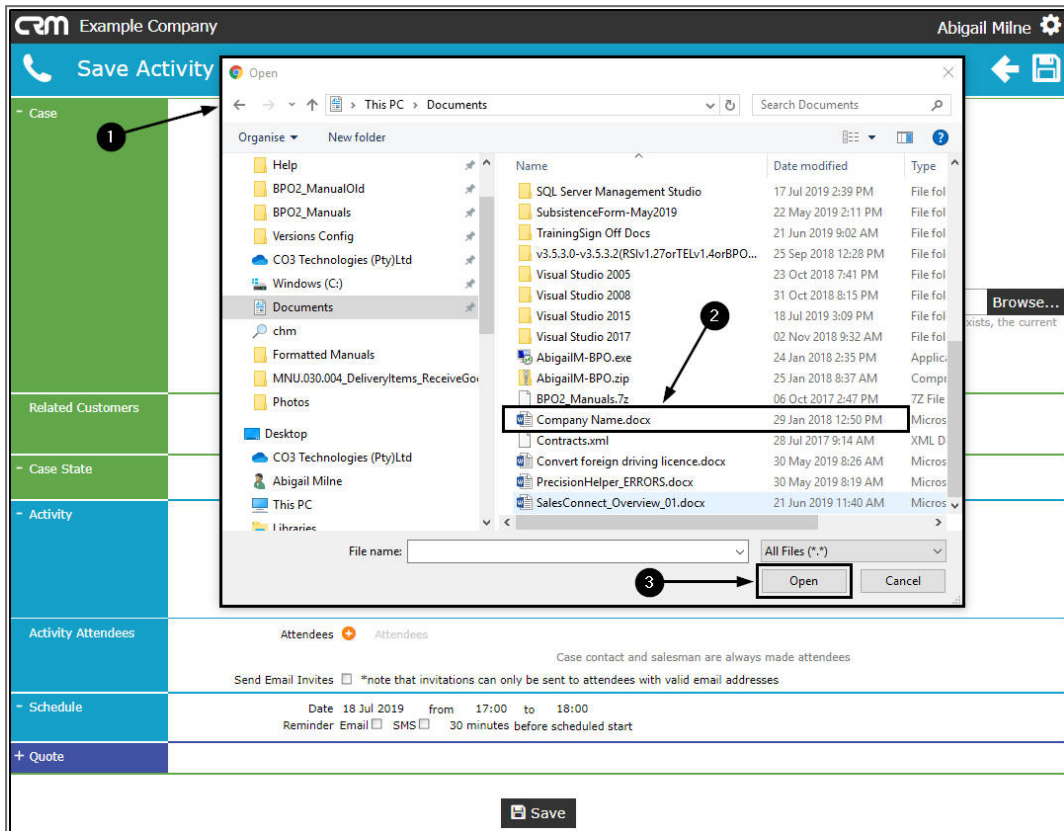
- Either type in, or click on the drop-down arrow that appears and use the calendar function to select the expected completion date of this case.

## ATTACHMENTS

2. Click on the **Browse...** button.

The screenshot shows the 'Save Activity' form in a CRM system. The form is divided into several sections: Case, Information, Attachments, Related Customers, Case State, Activity, Activity Attendees, Schedule, and Quote. The 'Case' section is currently selected. The 'Information' section contains fields for Value, Case Type, Case Date, Source Type, and Expected Completion. The 'Attachments' section is highlighted with a red circle and arrow labeled '1'. It contains a 'Browse...' button, which is also highlighted with a red circle and arrow labeled '2'. The 'Related Customers' section shows 'No data to display'. The 'Case State' section shows 'Current Case State' and '% Probability based on Case State'. The 'Activity' section contains fields for Type, Address, and Subject, and a 'Comments' field. The 'Activity Attendees' section shows 'Attendees' and a 'Send Email Invites' checkbox. The 'Schedule' section shows 'Date 17 Jul 2019 from 12:00 to 13:00' and 'Reminder Email' and 'SMS' checkboxes. The 'Quote' section is currently empty. A 'Save' button is located at the bottom of the form.

1. The **Open** file screen will pop up.
2. Search for and select the file you wish to link.
3. Click on **Open**.



1. The link for the selected document is now attached in the **Case** frame
2. You can now view a **Bin** icon. This can be used this to **Delete** the attachment from this frame, if required.

## VIEW ATTACHMENT

3. Click on the link.

CRM Example Company Abigail Milne

## Save Activity

**Case**

- \* Customer: King Enterprises
- \* Contact: Jason King
- \* Salesman: Abigail Milne
- \* Subject: New product range cold call

Information: Review client requirements

\* Value: 7500

Case Type: Type of Case Source Type: Cold Call

Case Date: 18 Jul 2019 Expected Completion: 25 Jul 2019

**Attachments** Attached files Browse...

Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

Company Name.docx

**Related Customers** Related Customers (No data to display)

**Case State**

- \* Case State:  Current Case State
- Percentage: % Probability based on Case State

**Activity**

- \* Type: Activity type
- \* Address: The address relating to the activity
- \* Subject: The subject of the activity

Comments: Information relating to the activity

**Activity Attendees** Attendees (Case contact and salesman are always made attendees)

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

**Schedule**

Date: 18 Jul 2019 from 17:00 to 18:00

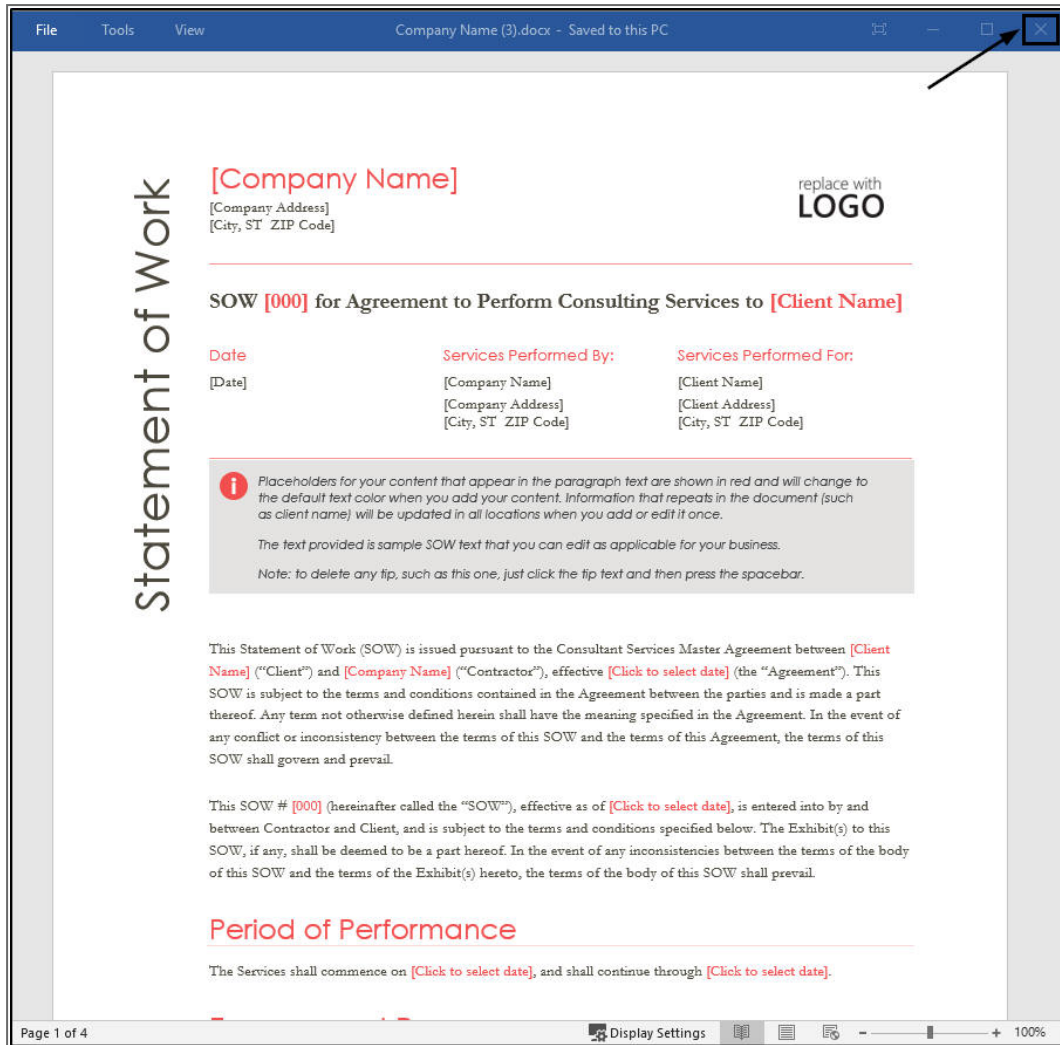
Reminder: Email  SMS  30 minutes before scheduled start

+ Quote

**Save**

- A **tab** will open at the foot of the screen, click on this tab.

- The attachment will open for viewing. **Exit** the screen to return to the **Save Activity** screen.



1. An Attachments information message informs you;
  - **Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.**

## RELATED CUSTOMERS

You can link a **Related Customer**, in order to invite contacts from various clients to an Activity - such as a meeting or training session.



2. Hover over the **Related Customers** field to reveal a drop-down arrow, click on this arrow.

The screenshot shows the 'Save Activity' form in a CRM system. The form is divided into several sections:

- Case:** Includes fields for Customer (King Enterprises), Contact (Jason King), Salesman (Abigail Milne), Subject (New product range cold call), Information (Review client requirements), Value (7500), Case Type (Type of Case), Source Type (Cold Call), Case Date (18 Jul 2019), and Expected Completion (25 Jul 2019).
- Attachments:** A text input field labeled 'Attached files' with a 'Browse...' button. A circled '1' points to this field. Below it is a note: 'Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.'
- Related Customers:** A field labeled 'Related Customers' with a dropdown arrow. A circled '2' points to this arrow. Below it is a note: 'No data to display'.
- Case State:** Includes Case State (Current Case State) and Percentage (% Probability based on Case State).
- Activity:** Includes Type (Activity type), Address (The address relating to the activity), Subject (The subject of the activity), and Comments (Information relating to the activity).
- Activity Attendees:** Includes Attendees (Attendees) and a note: 'Case contact and salesman are always made attendees'. There is also a checkbox for 'Send Email Invites' with a note: '\*note that invitations can only be sent to attendees with valid email addresses'.
- Schedule:** Includes Date (18 Jul 2019), from (17:00 to 18:00), and Reminder Email (SMS) (30 minutes before scheduled start).
- Quote:** A section for adding a quote.

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

1. A **list of customers** already set up on the system will be displayed.
2. Select the applicable related customer.

crm Example Company
Abigail Milne

Save Activity

Case

- \* Customer King Enterprises
- \* Contact Jason King
- \* Salesman Abigail Milne
- \* Subject New Product Range Cold Call

Information Review client requirements Machine Sale

\* Value 7500

Case Type Type of Case Source Type Cold Call

Case Date 17 Jul 2019 Expected Completion 24 Jul 2019

Attachments Attached files Browse...

Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

No data to display

Related Customers
Related Customers 

Name	Code
Hack PC - IT Shop	HAC001
Healing Hands	HEA0001
Hope Works	HOP001
IT Supplies	ITS0001
Joos Carpentry Shop	JOE0001
Judes Jewels	JUD0001
Just In Time	JUS001

Case State
\* Case State CUI

Activity
\* Type Acti

Activity Attendees
Attendees

Schedule
Date 17 Jul 2019 from 13:00 to 14:00

Quote

Save

1. The selected **Customer Name** and **Code** will populate the field.
2. Click on the **plus[+]** button.

1. The selected customer name will now appear in the data grid below this field.
2. You can now view a **Bin** icon - you can use this to delete the customer from this data grid, if required.

## LINK ADDITIONAL RELATED CUSTOMER(S)

3. Hover over the **Related Customers** field again to reveal the drop-down arrow, click on this arrow.

crm Example Company
Abigail Milne ⚙️

Save Activity
← 📄

Case

\* Customer King Enterprises  
\* Contact Jason King  
\* Salesman Abigail Milne  
\* Subject New product range cold call

Information Review client requirements

\* Value 7500  
 Case Type Machine Sale Source Type Cold Call  
 Case Date 17 Jul 2019 Expected Completion 24 Jul 2019

Attachments Attached files Browse...  
Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

Related Customers

Related Customers + Hope Works - HOP001  
Hope Works - HOP001

Case State

\* Case State Current Case State  
 Percentage % Probability based on Case State

Activity

\* Type Activity type  
\* Address The address relating to the activity  
\* Subject The subject of the activity

Comments Information relating to the activity

Activity Attendees

Attendees + Attendees  
Case contact and salesman are always made attendees

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

Schedule

Date 17 Jul 2019 from 16:00 to 17:00  
 Reminder Email  SMS  30 minutes before scheduled start

+ Quote

Save

1. The list of **customers** will be displayed.
2. Select the additional related customer.

CRM Example Company
Abigail Milne ⚙️

Save Activity
←
📄

Case

- \* Customer King Enterprises
- \* Contact Jason King
- \* Salesman Abigail Milne
- \* Subject New product range cold call

Information Review client requirements

\* Value 7500

Case Type Machine Sale Source Type Cold Call

Case Date 17 Jul 2019 Expected Completion 24 Jul 2019

Attachments Attached files Browse...

Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

Related Customers
Related Customers +

▼ | Hope Works: HOP001

Name	Code
test	TES0001
The Very Interesting Shop of Goodies	THE0001
Tinas Coffee Shop	TIN001
Titan Group	TTA001
Westwood Dynamic	WES001
Young Designs	YOU0001
Young Electric	YES001

Case State

- \* Case State Cur
- Percentage % P

Activity

- \* Type Act
- Address The
- \* Subject The

Comments Information relating to the activity

Activity Attendees
Attendees +

Case contact and salesman are always made attendees

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

Schedule

Date 17 Jul 2019 from 16:00 to 17:00

Reminder Email  SMS  30 minutes before scheduled start

+ Quote

Save

1. The selected additional Customer Name and Code will populate the **Related Customers** field.
2. Click on the **plus [+]** button.

CRM Example Company Abigail Milne

**Save Activity**

Case

- Customer King Enterprises
- Contact Jason King
- Salesman Abigail Milne
- Subject New product range cold call

Information Review client requirements

Value 7500  
Case Type Machine Sale  
Case Date 17 Jul 2019  
Source Type Cold Call  
Expected Completion 24 Jul 2019

Attachments Attached files Browse...  
Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

Related Customers

Related Customers
<span>bin</span> Titan Group - TIAD01 <span>bin</span> Hope Works - HOP001

No data to display

Case State

- Case State Current Case State
- Percentage % Probability based on Case State

Activity

- Type Activity type
- Address The address relating to the activity
- Subject The subject of the activity
- Comments Information relating to the activity

Activity Attendees

Attendees + Attendees  
Case contact and salesman are always made attendees

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

Schedule

Date 17 Jul 2019 from 16:00 to 17:00  
Reminder Email  SMS  30 minutes before scheduled start

+ Quote

Save

1. The additional customer name will now populate the data grid.
2. Note the **additional bin** - to enable you to remove this additional customer, if required.

You can continue to add customers in this way until you have all the related customers listed in the data grid.

## CASE STATE

1. Hover over the **Case State** field to reveal the drop-down arrow, click on this arrow.
2. A list of Case State **Descriptions** and their related **Percentages** (% probability based on Case State) will be displayed.
3. Select the Case State **Description** that applies to this activity.

- **Note 1:** If this Case Type has [Stage Gates](#) enabled, you can select whether to update the Stage Gates settings after saving the Case.
- **Note 2:** If this Case Type has [Stage Gates](#) enabled, the Case State will update automatically to the first Case State configured (You will need to update the Stage Gate Answers to move to the next Case State). Otherwise, select the Case State.

- **Note 3:** The Case State Percentage will update based on the Case State selected.

**Case**

- \* Customer King Enterprises
- \* Contact Jason King
- \* Salesman Abigail Milne
- \* Subject New product range cold call

Information Review client requirements

\* Value 7500  
Case Type Machine Sale  
Case Date 17 Jul 2019  
Source Type Cold Call  
Expected Completion 24 Jul 2019

Attachments **Attached files**

No data to display

**Related Customers**

Related Customers

- Titan Group - TIA001
- Hope Works - HOP001
- Titan Group - TIA001

**Case State**

Description	Percentage
Closed - Lost	0
Distant prospect - on hold	5
Interested	20
Meeting	25
First meeting	30
Proposal or quote	50
Negotiating	60

**Activity**

- \* Type Distant prospect - on hold
- \* Address Interested
- \* Subject Meeting
- Comments First meeting, Proposal or quote, Negotiating

**Activity Attendees**

Attendees Attendees

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

**Schedule**

Date 17 Jul 2019 from 16:00 to 17:00  
Reminder Email  SMS  30 minutes before scheduled start

**Quote**

1. The **Percentage** field will populate according to the Case State selected.

## ACTIVITY

2. Click in the **Type** field to display an **Activity Type** drop-down list.
3. Select from this list the applicable type (e.g. Phone call).



crm Example Company
Abigail Milne

Save Activity

Case

\* Customer: King Enterprises  
 \* Contact: Jason King  
 \* Salesman: Abigail Milne  
 \* Subject: New product range cold call

Information: Review client requirements

\* Value: 7500  
 Case Type: Machine Sale  
 Case Date: 17 Jul 2019

Source Type: The type of source  
 Expected Completion: 24 Jul 2019

Attachments: Attached files Browse...

Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

No data to display

Related Customers

Related Customers + Titan Group; TIA001

- Hope Works - HOP001
- Titan Group - TIA001

Case State

\* Case State: Interested (20%)

Percentage:

Activity

\* Type:

\* Address:

\* Subject: Email

Comments: Meeting  
On Site Inspection

Activity Attendees

Attendees + Attendees

Case contact and salesman are always made attendees

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

Schedule

Date: 18 Jul 2019 from 11:00 to 12:00

Reminder Email  SMS  30 minutes before scheduled start

Quote

Save

1. Click in the **Address** field, a list of all addresses linked to the customer will be displayed.
2. Select the applicable address from this list.

CRM Example Company
Abigail Milne

Save Activity

Case

\* Customer King Enterprises  
 \* Contact Jason King  
 \* Salesman Abigail Milne  
 \* Subject New product range cold call

Information Review client requirements

\* Value 7500  
 Case Type Machine Sale  
 Case Date 17 Jul 2019

Source Type The type of source  
 Expected Completion 24 Jul 2019

Attachments Attached files Browse...

Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

No data to display

Related Customers

Related Customers + Titan Group; TIA001

- Hope Works - HOP001
- Titan Group - TIA001

Case State

\* Case State Interested (20%)  
 Percentage 20%

Activity

\* Type Phone call

Address

\* Subject 

1 Richmond Street Richmond Town Richmond City  
 2 Upton Road Upton Town Upton City

Comments 

1 New Street New Town New City  
 1 Downton Street Downton Town Downton City  
 10 Main Road Main Town Main City KZN

Activity Attendees

Attendees 

10 Main Road Main Town Main City KZN

Case contact and salesman are always made attendees

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

Schedule

Date 18 Jul 2019 from 11:00 to 12:00

Reminder Email  SMS  30 minutes before scheduled start

Quote

Save

1. Type in the **Subject** of this Activity (e.g. Phone call to discuss present client requirements and give overview of new product range).
2. Type in a **Comment** relating to this Activity (e.g. Customer currently rents Model: xxyyx).

CRM Example Company
Abigail Milne

Save Activity

Case

- \* Customer King Enterprises
- \* Contact Jason King
- \* Salesman Abigail Milne
- \* Subject New product range cold call

Information Review client requirements

\* Value 7500

Case Type Machine Sale Source Type The type of source

Case Date 17 Jul 2019 Expected Completion 24 Jul 2019

Attachments Browse...

Attached files

Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

No data to display

Related Customers

Related Customers

- Titan Group; TIA001
- Hope Works - HOP001
- Titan Group - TIA001

Case State

- \* Case State Interested (20%)
- Percentage 20%

Activity

- \* Type Phone call
- Address 2 Upton Road Upton Town Upton City
- Subject The subject of the activity
- Comments Information relating to the activity

Activity Attendees

Attendees

Case contact and salesman are always made attendees

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

Schedule

Date 18 Jul 2019 from 11:00 to 12:00

Reminder Email  SMS  30 minutes before scheduled start

Quote

Save

## ACTIVITY ATTENDEES

1. Hover over the **Attendees** field to reveal the drop-down arrow, click on this arrow.
2. A list of **Attendee Names** and the **Customer Name** that each is linked to, will be displayed.
3. Select the **Attendee** that you wish to add to this Activity.

Help v2024.5.0.7/1.0 - Pg 19 - Printed: 04/07/2024

CO3 Technologies (Pty) Ltd © Company Confidential

CRM Example Company
Abigail Milne

Save Activity

Case

- \* Customer King Enterprises
- \* Contact Jason King
- \* Salesman Abigail Milne
- \* Subject New product range cold call

Information Review client requirements

- \* Value 7500
- Case Type Machine Sale
- Case Date 17 Jul 2019

Source Type The type of source

Expected Completion 24 Jul 2019

Attachments Attached files Browse...

Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

No data to display

Related Customers

Related Customers + Titan Group; TIA001

- Hope Works - HOP001
- Titan Group - TIA001

Case State

- \* Case State Interested (20%)
- Percentage 20%

Activity

- \* Type Phone call
- Address 2 Upton Road Upton Town Upton City
- \* Subject Phone call to discuss present client requirements and give overview of new product range.

Comments Customer currently rents Model: xxxxx

Activity Attendees

Attendees +

Send Email Invites

Attendee Name	Customer Name
Jackie Sutherland	Titan Group
Jane Alrich	Hope Works
Jason King	King Enterprises
John West	Hope Works
Kelly Jones	Hope Works
Larry King	Hope Works
Lucy Rowe	King Enterprises

Schedule

Date 18

Reminder Email

+ Quote

Save

1. The selected **Attendee Name** will populate the **Attendees** field.
2. Click on the **plus[+]** button.

CRM Example Company
Abigail Milne ⚙️

Save Activity
← 📄

Case

- \* Customer King Enterprises
- \* Contact Jason King
- \* Salesman Abigail Milne
- \* Subject New product range cold call

Information Review client requirements

\* Value 7500

Case Type Machine Sale Source Type The type of source

Case Date 17 Jul 2019 Expected Completion 24 Jul 2019

Attachments Attached files Browse...

Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

No data to display

Related Customers

Related Customers + Titan Group - TIA001

🗑️ Hope Works - HOP001

🗑️ Titan Group - TIA001

Case State

- \* Case State Interested (20%)
- Percentage 20%

Activity

- \* Type Phone call
- \* Address 2 Upton Road Upton Town Upton City
- \* Subject Phone call to discuss present client requirements and give overview of new product range.

Comments Customer currently rents Model: xxxx

Activity Attendees

Attendees + Kelly Jones 🗑️

Case contact and salesman are always made attendees

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

Schedule

Date 18 Jul 2019 from 11:00 to 12:00

Reminder Email  SMS  30 minutes before scheduled start

+ Quote

Save

1. The selected Attendee Name will now appear in the data grid below this field.
2. You can now view a **Bin** icon - you can use this to delete the Attendee from this data grid, if required.
3. Note that there is now a **Page Reference** field that reflects the contents of this data grid:
  - (Page 1 of 1 ( 1 items)).

**CRM Example Company** Abigail Milne

**Save Activity**

**Case**

- \* Customer King Enterprises
- \* Contact Jason King
- \* Salesman Abigail Milne
- \* Subject New product range cold call

Information Review client requirements

\* Value 7500

Case Type Machine Sale Source Type The type of source

Case Date 17 Jul 2019 Expected Completion 24 Jul 2019

Attachments **Attached files** Browse...

Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

No data to display

**Related Customers**

Related Customers + Titan Group; TIA001

- Hope Works - HOP001
- Titan Group - TIA001

**Case State**

- \* Case State Interested (20%)
- Percentage 20%

**Activity**

- \* Type Phone call
- \* Address 2 Upton Road Upton Town Upton City
- \* Subject Phone call to discuss present client requirements and give overview of new product range.

Comments Customer currently rents Model: xxxxx

**Activity Attendees**

Attendees + Kelly Jones

↓ Kelly Jones

Page 1 of 1 (1 items) Page size: 10

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

**Schedule**

Date 18 Jul 2019 from 11:00 to 12:00

Reminder Email  SMS  30 minutes before scheduled start

**+ Quote**

**Save**

## LINK ADDITIONAL ATTENDEE(S)

1. Hover over the **Attendees** field again to reveal the drop-down arrow, click on this arrow.
2. The list of **Attendee Names** will display again.
3. Select the additional Attendee that you wish to add to this Activity.

CRM Example Company
Abigail Milne ⚙️

Save Activity
←
📄

**Case**

- \* Customer King Enterprises
- \* Contact Jason King
- \* Salesman Abigail Milne
- \* Subject New product range cold call

Information Review client requirements

\* Value 7500

Case Type Machine Sale Source Type The type of source

Case Date 17 Jul 2019 Expected Completion 24 Jul 2019

Attachments Attached files Browse...

Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

No data to display

**Related Customers**

Related Customers + Titan Group - TIA001

- 📄 Hope Works - HOP001
- 📄 Titan Group - TIA001

**Case State**

\* Case State Interested (20%)

Percentage 20%

**Activity**

- \* Type Phone call
- Address 2 Upton Road Upton Town Upton City
- \* Subject Phone call to discuss present client requirements and give overview of new product range.

1 Comments Customer currently rents Model: xxxx

**Activity Attendees**

Attendees + Kelly Jones

2 + Accounts Contact 3

Send Email Invites

Attendee Name	Customer Name
Accounts Contact	Hope Works
Duncan McCreddie	Hope Works
Jackie Samuels	Hope Works
Jackie Sutherland	Titan Group

Date 18 Jul 2019 Jane, Alinch Hope Works

Reminder Email Jason King King Enterprises

John West Hope Works

**Schedule**

**Quote**

Save

1. The additional Attendee Name will populate the Related Customers field.
2. Click on the **plus[+]** button.

The screenshot shows a CRM interface for adding or editing an activity. The form is titled "Save Activity" and is for "Example Company". The user is "Abigail Milne". The form is divided into several sections:

- Case:** Customer: King Enterprises, Contact: Jason King, Salesman: Abigail Milne, Subject: New product range cold call. Information: Review client requirements. Value: 7500. Case Type: Machine Sale, Source Type: The type of source, Case Date: 17 Jul 2019, Expected Completion: 24 Jul 2019.
- Attachments:** Attached files. A note states: "Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name." There is a "Browse..." button.
- Related Customers:** Titan Group - TIA001, Hope Works - HOP001, Titan Group - TIA001.
- Case State:** Case State: Interested (20%), Percentage: 20%.
- Activity:** Type: Phone call, Address: 2 Upton Road Upton Town Upton City, Subject: Phone call to discuss present client requirements and give overview of new product range. Comments: Customer currently rents Model: xxxxxx.
- Activity Attendees:** Attendees: Jackie Sutherland (1), Kelly Jones (2). Page 1 of 1 (1 items) [1] [2] [3]. Page size: 10.
- Schedule:** Date: 18 Jul 2019, from: 11:00 to 12:00. Reminder Email:  SMS:  30 minutes before scheduled start.
- Quote:** + Quote

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

1. The additional **Attendee Name** will now populate the data grid.
2. Note the **additional bin** - to enable you to remove this additional attendee, if required.
3. Note that the **Page Reference** field has updated to reflect the additional attendee:
  - (Page 1 of 1 ( **2** items)).

You can continue to add attendees in this way until you have all the attendees required, listed in the data grid.

4. **Send Email Invites:** Select this check box if you wish to invite these attendees via **email**.
  - Each attendee must have a valid email address set up to receive an email invitation.



**CRM Example Company** Abigail Milne

## Save Activity

**Case**

- Customer King Enterprises
- Contact Jason King
- Salesman Abigail Milne
- Subject New product range cold call

Information Review client requirements

Value 7500

Case Type Machine Sale Source Type The type of source  
Case Date 17 Jul 2019 Expected Completion 24 Jul 2019

Attachments **Attached files** [Browse...](#)  
Please note, new files will only be added to the case when it is saved. If an attachment with the same name already exists, the current date and time will be appended to the file name.

No data to display

**Related Customers**

Related Customers + Titan Group - TIA001  
Hope Works - HOP001  
Titan Group - TIA001

**Case State**

Case State Interested (20%)  
Percentage 20%

**Activity**

Type Phone call  
Address 2 Upton Road Upton Town Upton City  
Subject Phone call to discuss present client requirements and give overview of new product range.

Comments Customer currently rents Model: xxxxxx

**Activity Attendees**

Attendees + Jackie Sutherland  
Kelly Jones  
Jackie Sutherland

Page 1 of 1 (2 items) [1] [2] [3] [4] [5] [6] [7] [8] [9] [10] Page size: 10

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

**Schedule**

Date 18 Jul 2019 from 11:00 to 12:00  
Reminder Email  SMS  30 minutes before scheduled start

**Save**

## SCHEDULE

1. The **Date** and **Time** of this Activity will auto populate with the current date and time.
2. Either type an alternative date directly into this field or click in the drop-down arrow.

The screenshot shows the 'Save Activity' form in a CRM system. The form includes fields for Case Date (17 Jul 2019), Expected Completion (24 Jul 2019), Attachments, Related Customers, Case State (Interested (20%)), Activity (Phone call), Activity Attendees (Jackie Sutherland, Kelly Jones), and Schedule (Date: 17 Jul 2019, From: 11:00 to 12:00). A calendar pop-up is visible over the 'Date' field, showing the date 18 Jul 2019 selected. A red circle '1' points to the date field, and a red circle '2' points to the calendar pop-up.

1. The calendar function will pop up.
2. Select an alternative date, if required.

The screenshot shows the 'Save Activity' form with the calendar pop-up open. The calendar displays the month of July 2019, with the date 18 Jul 2019 selected. A red circle '1' points to the calendar, and a red circle '2' points to the selected date. The 'Date' field in the 'Schedule' section now shows '18 Jul 2019'.

In the time **from** and **to** fields:

1. Either type the alternative time directly in the field,
2. Or, click in the field to display directional arrows, use these to select an alternative time.

The screenshot shows the 'Save Activity' form in a CRM system. The 'Schedule' section is highlighted, showing the date '18 Jul 2019' and time fields 'from 11:00 to 12:00'. A red box highlights the time fields, and a red arrow points to the 'from' field. A red circle with the number '1' is placed over the 'to' field, and a red circle with the number '2' is placed over the 'from' field. A 'Save' button is visible at the bottom of the form.

## REMINDER EMAIL / SMS

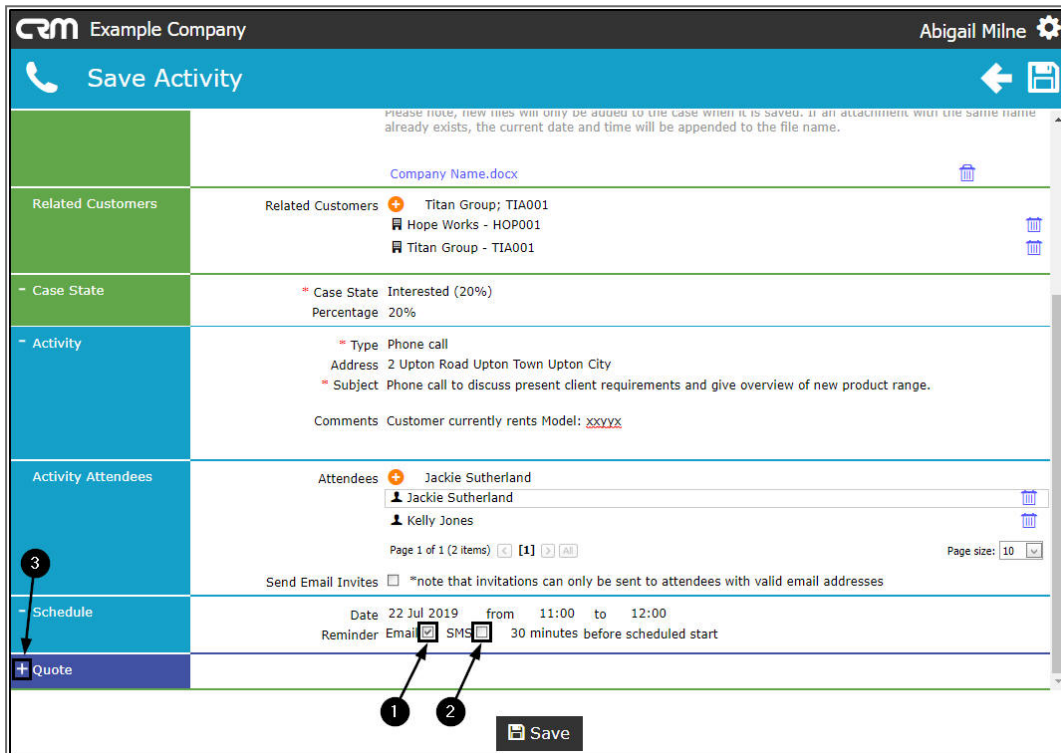
1. **Reminder Email:** Select this check box if you wish to have a reminder email sent to you, 30 minutes before the Activity start time.
2. **Reminder SMS:** Select this check box if you wish to have a reminder SMS sent to you, 30 minutes before the Activity start time.
  - **Note:** These reminders will only work if your mobile number and email address have been configured in Nucleus Service.

## SAVE ACTIVITY

You can now skip the next few steps and **Save the activity** if you do not wish to add a quote. Otherwise follow the process below to add a quote.

## ADD A QUOTE - OPTIONAL

3. Click on the **expand** icon [+]



- The **Quote** section will be expanded to expose the:
  - **Quote Financials**
  - **Add Quotes Items**
  - and **Quote Items** frames.
- Quote Settings:** As the Quote section is expanded, the system will pull through the customer default information and populate the following fields:

3. **Quote Contact:** This will populate with the contact selected in the Case section.

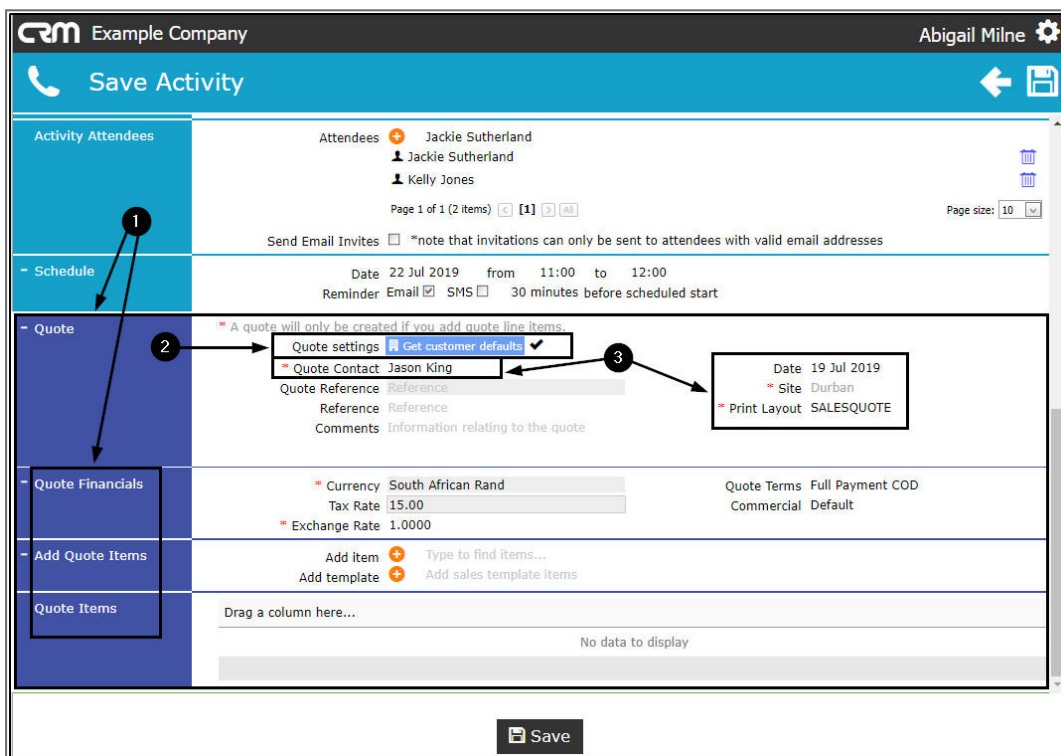
- You can click on the drop-down arrow and select an alternative contact from the drop-down list, if required.

**Date:** This will populate with the current date.

You can either type directly in this field to change the date, or click on the drop-down arrow and use the calendar function to select an alternative date if required.

**Site:** This will auto populate with the site set up on the customer.

**Print Layout:** This will auto populate with Sales Quote.



1. **Quote Reference:** The system will allocate a reference number as the quote is saved.

**Reference:** Type in a reference for this quote.

**Comments:** Type in a comment / additional information relating to this quote.

## QUOTE FINANCIALS

---

2. **Currency:** This will auto populate with the currency set up on the customer.

- You can click on the drop-down arrow and select an alternative currency, if required.

**Tax Rate:** This will auto populate with the tax rate set up on the customer.

**Exchange Rate:** This will auto populate with the exchange rate set up on the customer.

**Quote Terms:** This is the quote repayment factor and should be configured in [Static Data: Sales Quote Terms or Repayment Method](#) This will auto populate with Full Payment COD.

- You can click on the drop-down arrow and select an alternative payment period, if required.

**Commercial:** This will auto populate with the **commercial** set up on the customer.

- You can click on the drop-down arrow and select an alternative commercial, if required.

The screenshot shows the 'Save Activity' form in a CRM system. The form is divided into several sections:

- Activity Attendees:** Lists attendees Jackie Sutherland and Kelly Jones. Includes a 'Send Email Invites' checkbox and a note that invitations can only be sent to attendees with valid email addresses.
- Schedule:** Shows the date as 22 Jul 2019, from 11:00 to 12:00. Includes a 'Reminder' section with 'Email' checked and 'SMS' unchecked, set for 30 minutes before the start.
- Quote:** Contains a warning that a quote will only be created if quote line items are added. It includes 'Quote settings' (checked), 'Quote Contact' (Jason King), 'Date' (19 Jul 2019), 'Site' (Durban), and 'Print Layout' (SALESQUOTE). A red box highlights the 'Quote Reference' field, which is currently empty, with a red circle and the number '1' pointing to it.
- Quote Financials:** Shows 'Currency' (South African Rand), 'Tax Rate' (15.00), and 'Exchange Rate' (1.0000). 'Quote Terms' are set to 'Full Payment COD' and 'Commercial Default'. A red box highlights these fields, with a red circle and the number '2' pointing to them.
- Add Quote Items:** Includes 'Add item' (Type to find items...) and 'Add template' (Add sales template items) buttons.
- Quote Items:** A table area with the instruction 'Drag a column here...' and 'No data to display'.

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

## ADD QUOTE ITEM

You now have the ability to add single items to a quote.

- **Note:** For Part Numbers to pull through to this list - you need to ensure that the **Quote Products are specified** .
- In the **Add item** field, start typing the **code** or **description** of the item you wish to link to this quote.

CRM Example Company
Abigail Milne

📞 Save Activity ← 📄

Activity Attendees

Attendees + Jackie Sutherland  
↓ Kelly Jones  
↓ Jackie Sutherland

Page 1 of 1 (2 items) ◀ [1] ▶

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

Schedule

Date 22 Jul 2019 from 13:00 to 14:00

Reminder Email  SMS  30 minutes before scheduled start

Quote

\* A quote will only be created if you add quote line items.

Quote settings 🔍 Get customer defaults

\* Quote Contact Jason King Date 19 Jul 2019

Quote Reference Reference \* Site Durban

Reference Q/KE/001 \* Print Layout SALESQUOTE

Comments Quote for old rental machine to be replaced with a new model.

Quote Financials

\* Currency South African Rand Quote Terms Full Payment COD

Tax Rate 15.00 Commercial Default

\* Exchange Rate 1.0000

Add Quote Items

Add item +

Add template + Add Sales Template Items

Quote Items

Drag a column here...

No data to display

Save

1. As you start typing in the field, a **Type**, **Code** and **Description** list of all items on the system, will be displayed.
2. The system will filter for the item that you are searching for.
3. Select the applicable item from this list.



The screenshot shows the 'Save Activity' form in a CRM system. The form is divided into several sections: Activity Attendees, Schedule, Quote, Quote Financials, Add Quote Items, and Quote Items. The 'Add Quote Items' section is currently active, displaying a table of copier items. A search filter 'copier' is applied. The table lists various copier models with their codes and descriptions. A 'Save' button is located at the bottom of the form.

Type	Code	Description	#
INWN	SP2020	SP2020 Sprint Colour Multi Functiona	1
INWN	SP1818	Sprint copier	12
INWN	1458-96523	K147 Kyocera Colour Copier	13
INWN	KM250MFP	Konica Minolta Colour Multi-Functions	20
INWN	SP19-123456	SP19-12 Colour Copier	22
INWN	SP204	SP204 Colour Copier	26
INWN	SP1020	Copier	57

1. The selected item code and description will populate the **Add** item field.
2. Click on the **plus[+]** button.

1. The item will be added to the **Quote Items** frame.
2. You will note that there are **2** action buttons linked to this item.
  - i. An **Edit** button. This will enable you to edit the item details e.g. quantity, price, if required.
  - ii. A **Delete** button. This will enable you to delete the item from the quote, if required.

## EDIT QUOTE ITEM

3. Click on the **Edit** button.

CRM Example Company | Abigail Milne

**Save Activity**

Jackie Sutherland

Page 1 of 1 (2 items) | Page size: 10

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

**Schedule**  
 Date: 22 Jul 2019 from 13:00 to 14:00  
 Reminder: Email  SMS  30 minutes before scheduled start

**Quote**  
 \* A quote will only be created if you add quote line items.  
 Quote settings: [Get customer defaults](#) ✓  
 Quote Contact: Jason King | Date: 19 Jul 2019  
 Quote Reference: Reference | Site: Durban  
 Reference: Q/KE/001 | \* Print Layout: SALESQUOTE  
 Comments: Quote for old rental machine to be replaced with a new model.

**Quote Financials**  
 \* Currency: South African Rand | Quote Terms: Full Payment COD  
 Tax Rate: 15.00 | Commercial: Default  
 \* Exchange Rate: 1.0000

**Add Quote Items**  
 Add item: Type to find items...  
 Add template: Add sales template items

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	1	5610.67	5400.00		5400.00	[Edit] [Delete]	6210.00
				5610.67	5400.00	0.00	5400.00		6210.00

**Save**

1. An **edit item** frame will be displayed.

Here you can make changes to the following details:

2. **Item Description**
3. **Item Quantity**
4. **Item Unit Cost**
5. **Item Price**

6. Click on the **Apply Changes** icon [ ] to save your changes or the **Cancel changes** icon [x] to cancel the changes, as required.

CRM Example Company | Abigail Milne

**Save Activity**

Page 1 of 1 (2 items) | Page size: 10

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

**Schedule**  
 Date: 22 Jul 2019 from 13:00 to 14:00  
 Reminder: Email  SMS  30 minutes before scheduled start

**Quote**  
 \* A quote will only be created if you add quote line items.  
 Quote settings: [Get customer defaults](#) ✓  
 Quote Contact: Jason King | Date: 19 Jul 2019 | Site: Durban  
 Quote Reference: Reference | \* Print Layout: SALESQUOTE  
 Reference: Q/KE/001 | Comments: Quote for old rental machine to be replaced with a new model.

**Quote Financials**  
 \* Currency: South African Rand | Quote Terms: Full Payment COD  
 Tax Rate: 15.00 | Commercial: Default  
 \* Exchange Rate: 1.0000

**Add Quote Items**  
 Add item  Type to find items...  
 Add template  Add sales template items

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive
INVN	SP2020	SP1919 Sprint Colour Multi Functional Copier	1	5610.67	5400.00		5400.00		6210.00

Quote Item Description: SP2020 Sprint Colc | Quantity: 1 | Unit Cost: 5610.674500 | Item Price: 5400.00

Buttons: Save, Cancel (X), Confirm (✓)

1. In this example, the changes have been cancelled and the original item details remain.

## LINK ADDITIONAL QUOTE ITEMS

2. In the **Add item** field, start typing the **code** or **description** of the next item that you wish to add to the quote.

crm Example Company
Abigail Milne

Save Activity

Activity Attendees

Attendees Jackie Sutherland  
 Kelly Jones  
 Jackie Sutherland

Page 1 of 1 (2 items)

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

Schedule

Date 22 Jul 2019 from 13:00 to 14:00  
 Reminder Email  SMS  30 minutes before scheduled start

Quote

\* A quote will only be created if you add quote line items.  
 Quote settings [Get customer defaults](#)

\* Quote Contact Jason King Date 19 Jul 2019  
 Quote Reference  \* Site Durban  
 Reference Q/KE/001 \* Print Layout SALESQUOTE  
 Comments Quote for old rental machine to be replaced with a new model.

Quote Financials

\* Currency South African Rand Quote Terms Full Payment COD  
 Tax Rate 15.00 Commercial Default  
 \* Exchange Rate 1.0000

Add Quote Items

Add item  2  
 Add template Add sales template items

Quote Items

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	1	5610.67	5400.00		5400.00		6210.00
				5610.67	5400.00	0.00	5400.00		6210.00

Save

1. As you start typing in the field, the **Type**, **Code** and **Description** list will again be displayed.
2. The system will filter for the item that you are searching for.
3. Select the applicable item from this list.

**CRM Example Company** Abigail Milne

**Save Activity**

**Activity Attendees**  
Attendees: Jackie Sutherland, Kelly Jones, Jackie Sutherland  
Page 1 of 1 (2 items) | Page size: 10

**Schedule**  
Date: 22 Jul 2019 from 13:00 to 14:00  
Reminder: Email  SMS  30 minutes before scheduled start

**Quote**  
\* A quote will only be created if you add quote line items.  
Quote settings: [Get customer defaults](#)   
Quote Contact: Jason King | Date: 19 Jul 2019 | Site: Durban  
Quote Reference: Reference | Reference: Q/KE/001 | Print Layout: SALESQUOTE  
Comments: Quote for old rental machine to be replaced with a new model.

**Quote Financials**  
Currency: South African Rand | Tax Rate: 15.00 | Exchange Rate: 1.0000  
Quote Terms: Full Payment COD | Commercial: Default

**Add Quote Items**  
Add item:    
Add template

Type	Code	Description	#
INVN	2020-147K	Black Toner SP2020	2
INVN	SP19-147K	Black Toner SP1919	4
INVN	SP19-147Y	Yellow Toner SP1919	6
INVN	SP19-147M	Magenta Toner SP1919	7
INVN	2020-147M	Magenta Toner SP2020	8
INVN	2020-147C	Cyan Toner SP2020	9
INVN	147-888944	K147 Black Toner	14

**Quote Items**  
Item Type: INVN | Item Code: SP2020  
Subtotal: 5610.67 | Total: 5400.00 | Tax: 0.00 | Net: 5400.00 | Grand Total: 6210.00

1. The additional item code and description will populate the **Add** item field.
2. Click on the **plus [+]** button.

crm Example Company
Abigail Milne

Save Activity
←

**Activity Attendees**

Attendees Jackie Sutherland  
 Kelly Jones  
 Jackie Sutherland

Page 1 of 1 (2 items)

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

**Schedule**

Date 22 Jul 2019 from 13:00 to 14:00  
 Reminder Email  SMS  30 minutes before scheduled start

**Quote**

\* A quote will only be created if you add quote line items.  
 Quote settings [Get customer defaults](#)

\* Quote Contact Jason King Date 19 Jul 2019  
 Quote Reference  \* Site Durban  
 Reference Q/KE/001 \* Print Layout SALESQUOTE  
 Comments Quote for old rental machine to be replaced with a new model.

**Quote Financials**

\* Currency South African Rand Quote Terms Full Payment COD  
 Tax Rate 15.00 Commercial Default  
 \* Exchange Rate 1.0000

**Add Quote Items**

Add item INVN | 2020-147K | Black toner SP2020 ← **1**  
 Add template

Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive
INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	1	5610.67	5400.00		5400.00		6210.00
				5610.67	5400.00	0.00	5400.00		6210.00

Save

1. The additional item will be added to the **Quote Items** frame.
2. Edit the details, if required.
3. The quote **Total Inclusive** amount will update to include this item.

## SAVE ACTIVITY

4. When you have finished adding items to the Quote sections, click on **Save**.

crm Example Company
Abigail Milne

Save Activity

Page 1 of 1 (2 items) Page size: 10

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

---

**Schedule**

Date 22 Jul 2019 from 13:00 to 14:00  
 Reminder Email  SMS  30 minutes before scheduled start

---

**Quote**

\* A quote will only be created if you add quote line items.  
 Quote settings [Get customer defaults](#)   
 Quote Contact Jason King Date 19 Jul 2019  
 Quote Reference Reference Site Durban  
 Reference Q/KE/001 \* Print Layout SALESQUOTE  
 Comments Quote for old rental machine to be replaced with a new model.

---

**Quote Financials**

\* Currency South African Rand Quote Terms Full Payment COD  
 Tax Rate 15.00 Commercial Default  
 \* Exchange Rate 1.0000

---

**Add Quote Items**

Add item  Type to find items...  
 Add template  Add sales template items

---

Quote Items	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Item Price	Payment per Period	Total	Actions	Total Inclusive
	INVN	SP2020	SP2020 Sprint Colour Multi Functional Copier	1	5610.67	5400.00		5400.00		6210.00
	INVN	2020-147K	Black toner SP2020	1	481.70	526.63	526.63	526.63		605.62
						6092.37	5926.63	526.63	5926.63	6815.62

Save

- You will return to the Homepage.
- The 1 Month Performance and 4 Month Pipeline graphs will update to include the new quote statistic.



**CRM Example Company** | Abigail Milne

**Dashboard** (1) | Search

**Activities for Last 30 Days**

Description	Target	Existing Custmrs	New Custmrs
Phone call	10000	0	7
Email	0	0	1
Meeting	0	0	0
On Site inspection	0	0	0
Site inspection	2	0	0

**1 Month Performance** (2)

Category	Value
Cases	~14000.00
Invoices	~1000.00
Orders	~5000.00
Quotes	~5000.00

**4 Month Pipeline**

Month	Value
Jul 2019	~1400.00
Aug 2019	~1200.00
Sep 2019	~1000.00
Oct 2019	~800.00

**Activity Tiles:**

- create cold call (30 Sep 2016, 0)
- recommendations (0)
- warnings (6)
- customers (74)
- cases (7)
- activities (7)
- quotes (5)
- equipment (147)
- 3rd party (4)

**Table:** Today | Recent | Calendar | Schedule Date | Status | No data to display

©2019 CO3 Technologies (Pty) Ltd (3.5.6.0 / 3.5.6.0)

## Related Topics

- [View / Print / Email the Quote](#)

CRM.000.006

