

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

## CRM BASICS

### ACTIVITIES

In CRM, an activity is any type of interaction that involves your customer:

- A Call
- An Email
- A Meeting
- An On-Site Inspection

**Client specific activities** can be accessed from Customer Homepage.

A full list of all customers activities can be accessed from the **Homepage** as set out below.

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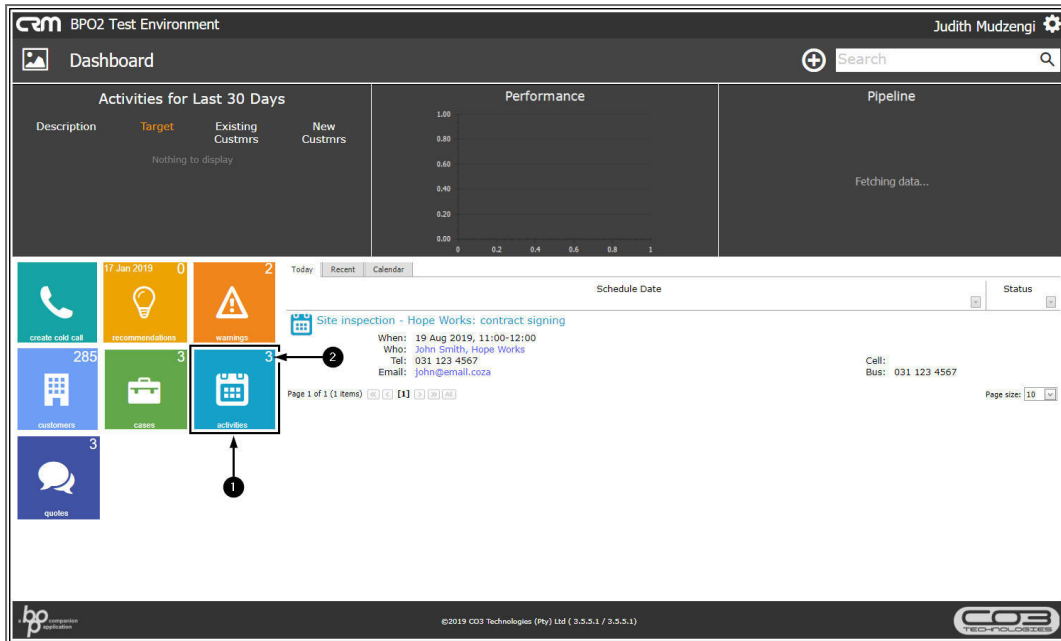
**Access:** Webpage > [http://\[servername\]:\[portno\]/BPOCRM/User.aspx](http://[servername]:[portno]/BPOCRM/User.aspx)

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### **CUSTOMERS ACTIVITIES FROM THE HOMEPAGE**

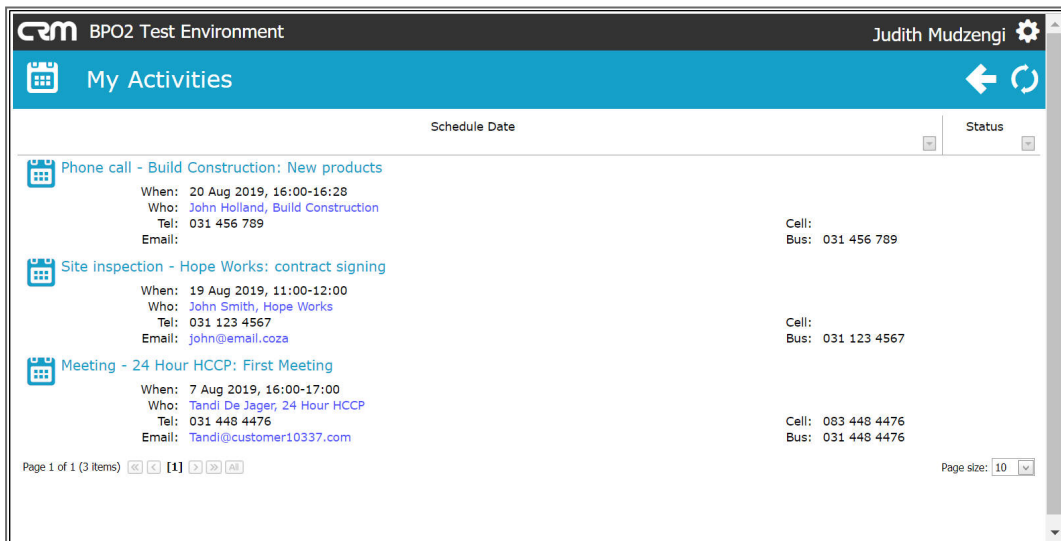
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1. Click on the **Activities** tile in the **Homepage**.
2. The **number** in the top right of this tile shows you the amount of open activities.

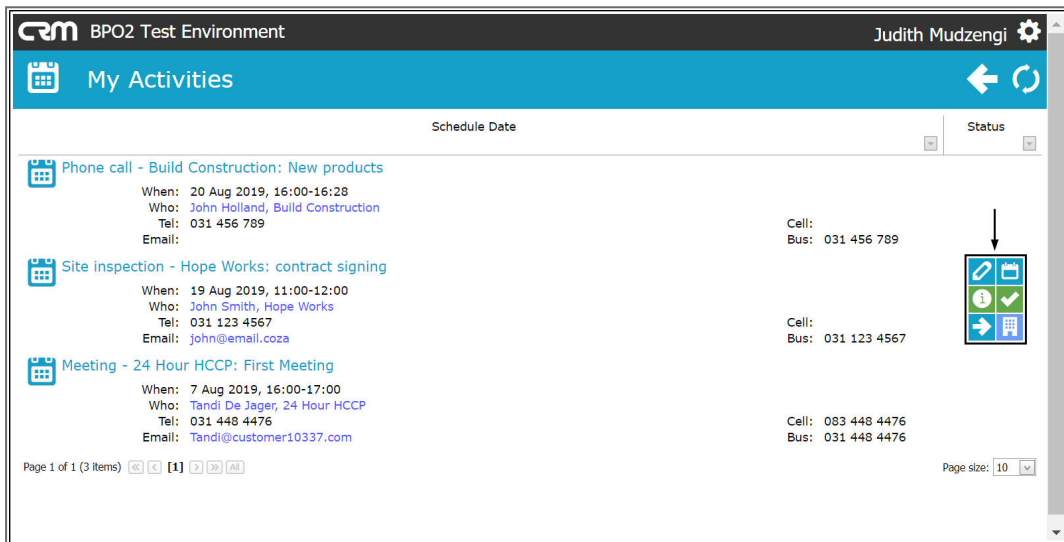


## MY ACTIVITIES PAGE

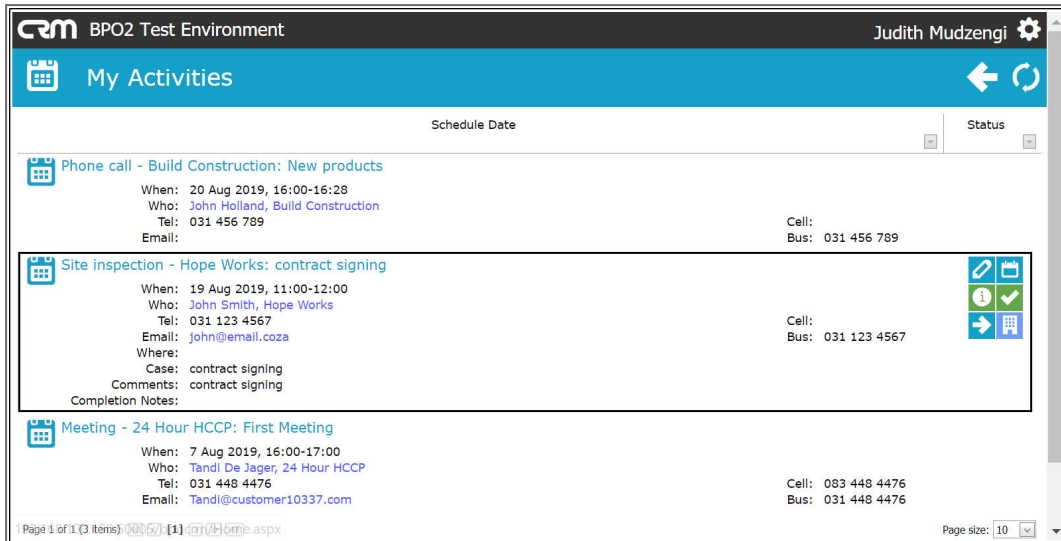
- **My Activities** page will be open.
- A list of activities will be displayed (where you have open activities).



- **Action** buttons are available by hovering over an **Activity** , and the options are:
  - **Reschedule this Activity**
  - **View / Edit Activity**
  - **Close this Case**
  - **View Case Info and History**
  - **View Customer**
  - **Next Action** (close current activity and create new activity)

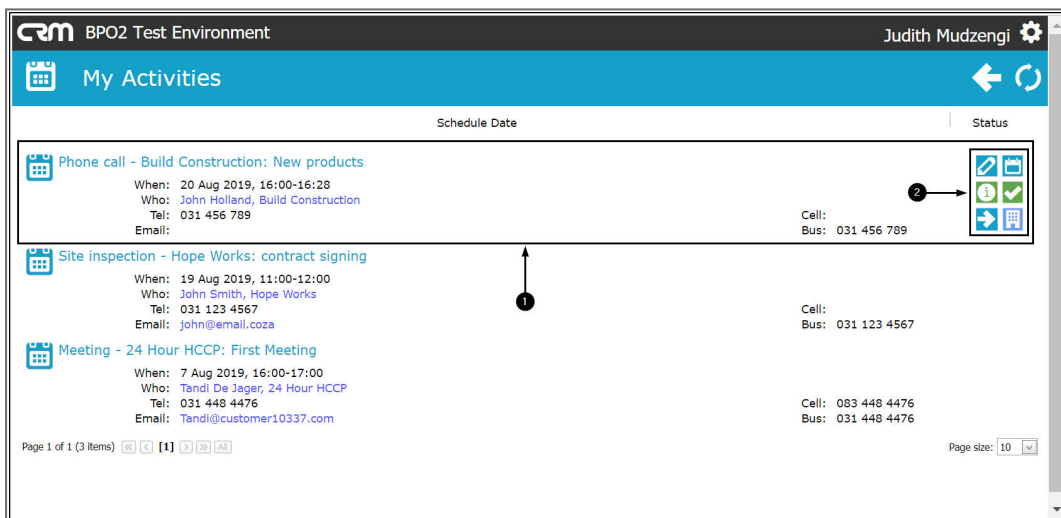


- Click on an **Activity** to access a quick view summary of the activity information.



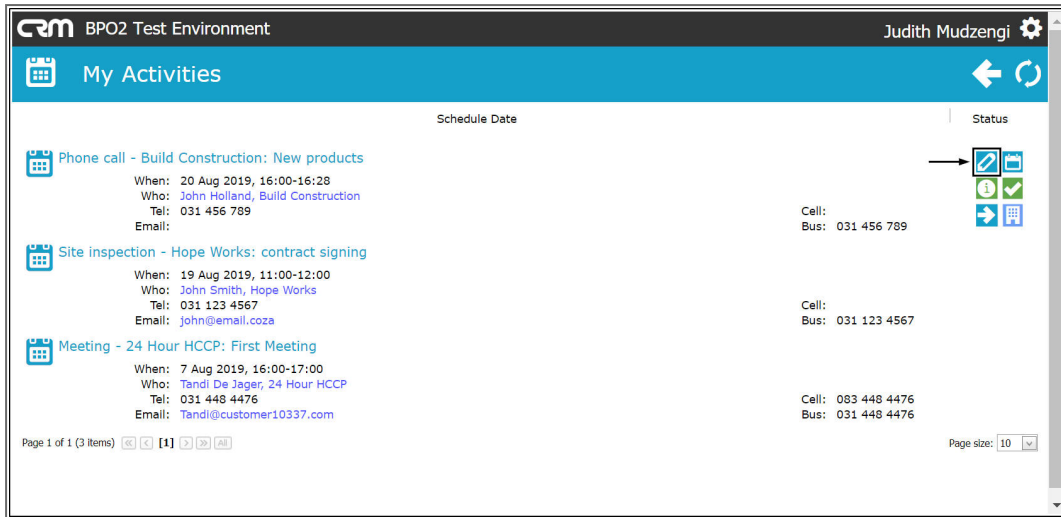
## ACTION BUTTONS

1. Hover over an activity.
2. **Action** buttons will be displayed.



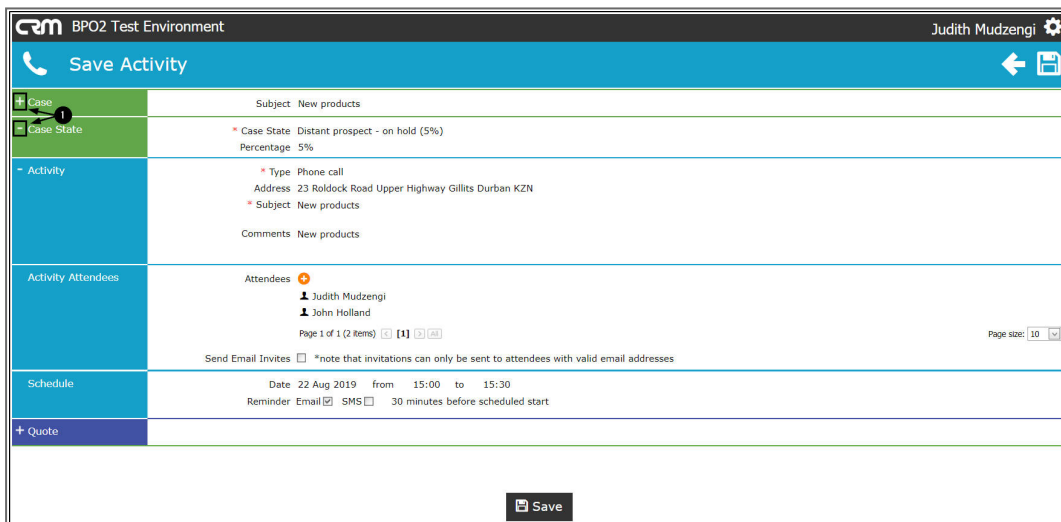
## VIEW / EDIT ACTIVITY

- Click on the **View / Edit this Activity** icon.



## Save Activity

- The **Save Activity** screen will be displayed.
  - Click on the ' + ' sign to view more details or the ' - ' sign to view less details.



### 1. CASE DETAILS

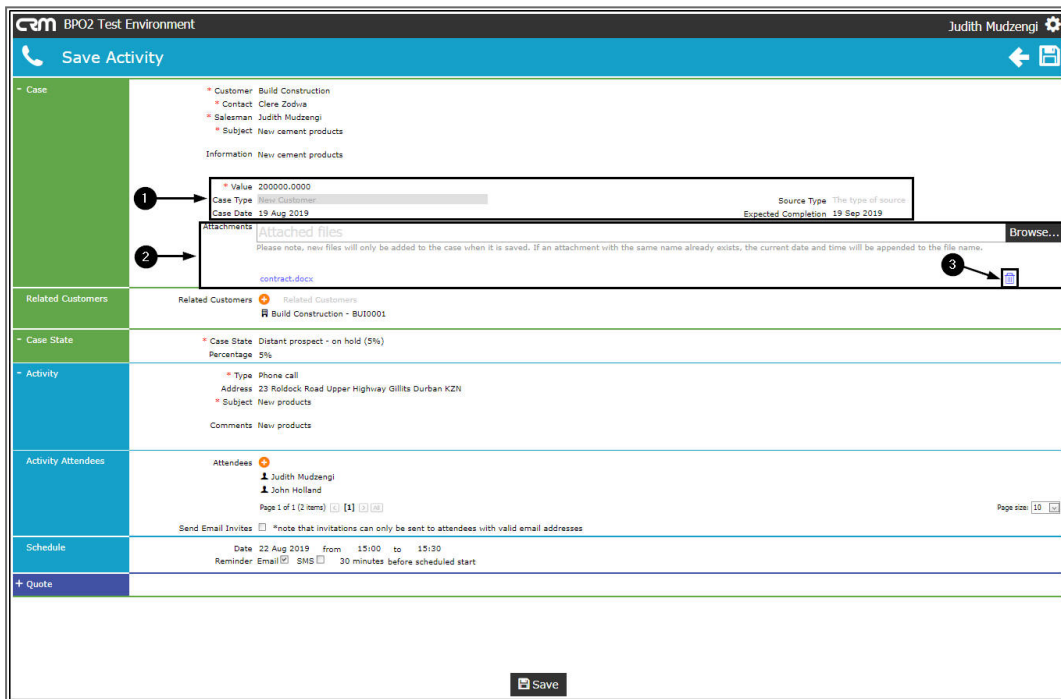
- Customer** : The customer will auto populate. This field cannot be edited.

- **Contact** : The contact will auto populate. Click in this field to display a list of all the contacts linked to the selected customer. Select the relevant contact if applicable.
- **Salesman** : The salesman will auto populate. This field cannot be edited.
- **Subject** : Delete and type in the relevant subject if applicable.
- **Information** : Delete and type in the relevant information if applicable.

## 1. Case Details Continue

- **Value** : Type in or edit the estimated value if required.
- **Case Type** : The case type will auto populate. This field cannot be edited.
- **Case Date** : Click on the drop-down arrow and select the required date from the calendar if applicable.

- **Source Type** : Click in this field to display a list of all source types and select the required source type if applicable.
  - **Expected Completion** : Click on the drop-down arrow and select the required date if applicable.
- 2.
- **Attachments** : You can add (hyperlink needed 000.014) an attachment if applicable.0
- 3.
- **Attachments** : You can also delete an attachment by clicking on the **Delete** icon if applicable.



- A message box will pop up asking you;
  - **Are you sure you want to remove the attachment from the case? You cannot undo this action.**
- Click on **Ok** .

CRM BPO2 Test Environment
192.168.100.150:60005 says
Judith Mudzengi

Save Activity
←
📄

192.168.100.150:60005 says  
Are you sure you want to remove this attachment from the case?  
You cannot undo this action.

<b>Case</b>	<ul style="list-style-type: none"> <li>* Customer: Build Construction</li> <li>* Contact: Clere Zodvia</li> <li>* Salesman: Judith Mudzengi</li> <li>* Subject: New cement products</li> </ul> <p>Information: New cement products</p> <p>* Value: 150000.0000</p> <p>Case Type: CRMCCTNEWC</p> <p>Case Date: 23 Aug 2019</p> <p>Source Type: Referral</p> <p>Expected Completion: 30 Aug 2019</p> <p>Attachments: Attached files <span style="float: right;">Browse...</span></p> <p>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.</p> <p>contract.docx <span style="float: right;">🗑️</span></p>
<b>Related Customers</b>	<p>Related Customers <span style="float: right;">+</span></p> <ul style="list-style-type: none"> <li>Build Construction - BU10001</li> </ul>
<b>Case State</b>	<ul style="list-style-type: none"> <li>* Case State: Distant prospect - on hold (5%)</li> <li>Percentage: 5%</li> </ul>
<b>Activity</b>	<ul style="list-style-type: none"> <li>* Type: Phone call</li> <li>Address: 23 Roldock Road Upper Highway Gillits Durban KZN</li> <li>* Subject: New products</li> </ul> <p>Comments: New products</p>
<b>Activity Attendees</b>	<p>Attendees <span style="float: right;">+</span></p> <ul style="list-style-type: none"> <li>👤 Judith Mudzengi</li> <li>👤 Clere Zodvia</li> <li>👤 John Holland</li> </ul> <p>Page 1 of 1 (3 items) <span style="float: right;">📄</span></p> <p>Send Email Invites <input type="checkbox"/> *note that invitations can only be sent to attendees with valid email addresses</p>
<b>Schedule</b>	<p>Date: 22 Aug 2019 from 15:00 to 15:30</p> <p>Reminder: Email <input type="checkbox"/> SMS <input type="checkbox"/> 30 minutes before scheduled start</p>
<b>+ Quote</b>	

- The attachment will be removed from the **Case** section.

CRM BPO2 Test Environment
Judith Mudzengi

Save Activity
←
📄

<b>Case</b>	<ul style="list-style-type: none"> <li>* Customer: Build Construction</li> <li>* Contact: Clere Zodvia</li> <li>* Salesman: Judith Mudzengi</li> <li>* Subject: New cement products</li> </ul> <p>Information: New cement products</p> <p>* Value: 150000.0000</p> <p>Case Type: CRMCCTNEWC</p> <p>Case Date: 23 Aug 2019</p> <p>Source Type: Referral</p> <p>Expected Completion: 30 Aug 2019</p> <p>Attachments: Attached files <span style="float: right;">Browse...</span></p> <p>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.</p> <p style="text-align: center;">→ No data to display</p>
<b>Related Customers</b>	<p>Related Customers <span style="float: right;">+</span></p> <ul style="list-style-type: none"> <li>Build Construction - BU10001</li> </ul>
<b>Case State</b>	<ul style="list-style-type: none"> <li>* Case State: Distant prospect - on hold (5%)</li> <li>Percentage: 5%</li> </ul>
<b>Activity</b>	<ul style="list-style-type: none"> <li>* Type: Phone call</li> <li>Address: 23 Roldock Road Upper Highway Gillits Durban KZN</li> <li>* Subject: New products</li> </ul> <p>Comments: New products</p>
<b>Activity Attendees</b>	<p>Attendees <span style="float: right;">+</span></p> <ul style="list-style-type: none"> <li>👤 Judith Mudzengi</li> <li>👤 Clere Zodvia</li> <li>👤 John Holland</li> </ul> <p>Page 1 of 1 (3 items) <span style="float: right;">📄</span></p> <p>Send Email Invites <input type="checkbox"/> *note that invitations can only be sent to attendees with valid email addresses</p>
<b>Schedule</b>	<p>Date: 22 Aug 2019 from 15:00 to 15:30</p> <p>Reminder: Email <input type="checkbox"/> SMS <input type="checkbox"/> 30 minutes before scheduled start</p>
<b>+ Quote</b>	

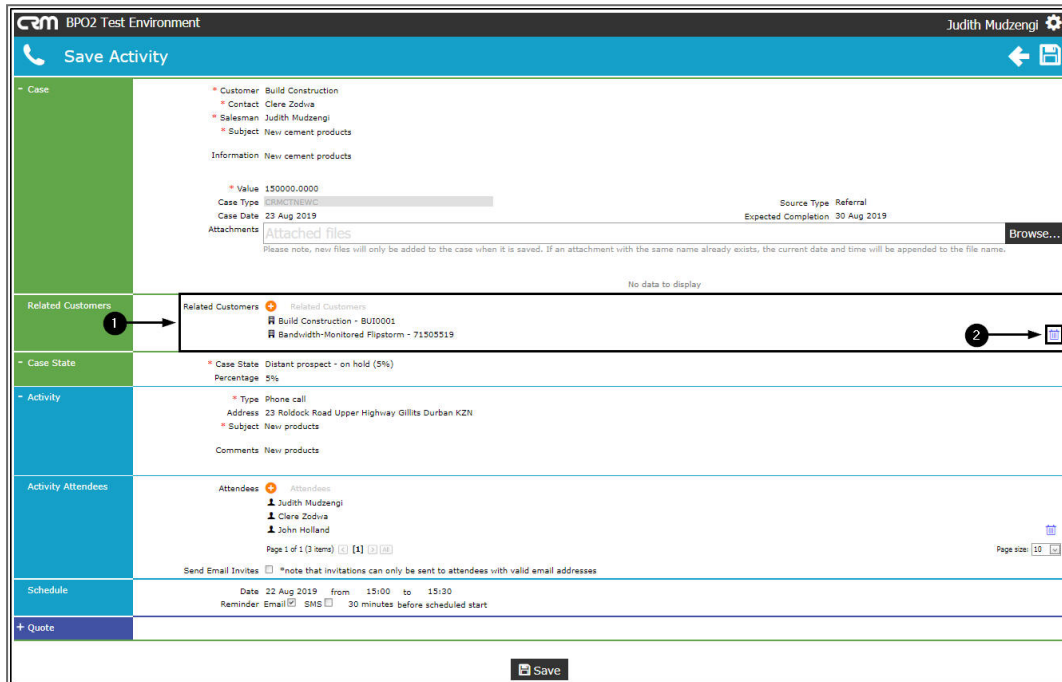
1.



- **Related Customers** : You can add related customers if applicable. (hyperlink needed 000.014)

2.

- **Related Customers** : You can delete a related customer if applicable by clicking on the **Delete** icon.



- A message box will pop up asking you;
  - **Are you sure you want to remove this customer from the case? All this customer's contacts will also be removed from activity attendees.**
- Click on **Ok** .

CRM BPO2 Test Environment
192.168.100.150:60005 says
Judith Mudzengi

Save Activity

Are you sure you want to remove this customer from the case?  
All this customer's contacts will also be removed from activity attendees.

Case

\* Contact: Clere Zodia  
\* Salesman: Judith Mudzengi  
\* Subject: New cement products

Information: New cement products

\* Value: 150000.0000  
Case Type: DRACHTNEVC  
Case Date: 23 Aug 2019  
Source Type: Referral  
Expected Completion: 30 Aug 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 Build Construction - BU00001  
Bandwidth-Monitored Flipstorm - 71500519

Case State: \* Case State: Distant prospect - on hold (5%)  
Percentage: 5%

Activity: \* Type: Phone call  
Address: 23 Roldock Road Upper Highway Gillits Durban KZN  
\* Subject: New products  
Comments: New products

Activity Attendees: Attendees  
Judith Mudzengi  
Clere Zodia  
John Holland

Page 1 of 1 (3 items) 1 2 3

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

Schedule: Date: 22 Aug 2019 from 15:00 to 15:30  
Reminder: Email  SMS  30 minutes before scheduled start

+ Quote

- The customer will be removed from the **Related Customers** section.

CRM BPO2 Test Environment
Judith Mudzengi

Save Activity

\* Customer: Build Construction  
\* Contact: Clere Zodia  
\* Salesman: Judith Mudzengi  
\* Subject: New cement products

Information: New cement products

\* Value: 150000.0000  
Case Type: DRACHTNEVC  
Case Date: 23 Aug 2019  
Source Type: Referral  
Expected Completion: 30 Aug 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 Build Construction - BU00001

Case State: \* Case State: Distant prospect - on hold (5%)  
Percentage: 5%

Activity: \* Type: Phone call  
Address: 23 Roldock Road Upper Highway Gillits Durban KZN  
\* Subject: New products  
Comments: New products

Activity Attendees: Attendees  
Judith Mudzengi  
Clere Zodia  
John Holland

Page 1 of 1 (3 items) 1 2 3

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

Schedule: Date: 22 Aug 2019 from 15:00 to 15:30  
Reminder: Email  SMS  30 minutes before scheduled start

+ Quote

## Case State Details

- **Case State** : Click in this field to display a list of all the Case States Descriptions and their Percentages on the system. Select the relevant description if applicable.
- **Percentage** : This field will populate according to the Case State selected.

## Activity Details

- **Type** : The type will auto populate. This field cannot be edited.
- **Address** : Click in the Address field, a list of all addresses linked to the customer will be displayed. Select the relevant address from this list if applicable.

- **Subject** : Edit the subject if applicable.
- **Comments** : Edit the comments if applicable.

## Activity Attendees

1. **Attendees** : You can link additional attendees if applicable. (hyperlink needed 000.014)
2. **Send Email Invites** : Tick the checkbox if you wish to send email invites. Untick the checkbox if you do not wish to send email invites.
3. **Attendees** : You can delete an additional attendee (one who is not the case salesman or case customer contact) if applicable by clicking on the **Delete** icon.

**Save Activity**

Case

- Customer: Build Construction
- Contact: Clare Zodwa
- Salesman: Judith Mudzengi
- Subject: New cement products

Information: New cement products

\* Value: 150000.0000

Case Type:  Source Type: Referral

Case Date: 23 Aug 2019 Expected Completion: 30 Aug 2019

Attachments:

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:

Build Construction - BU00001

Case State: Cold Call (10%)

Percentage: 10%

Activity

- Type: Phone call
- Address: 3 Colinton Road Gillits Upper Highway KZN
- Subject: Market new products

Comments: Market new products

Activity Attendees

Attendees

- Judith Mudzengi
- Clare Zodwa
- John Holland

Page 1 of 1 (3 items)

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

Schedule

Date: 23 Aug 2019 from 15:00 to 15:30

Reminder: Email  SMS  30 minutes before scheduled start

+ Quote

- A message box will pop up asking you;
  - **Are you sure you want to remove this attendee from the activity?**
- Click on **Ok** .

CRM BPO2 Test Environment
192.168.100.150:60005 says
Judith Mudzengi

Save Activity
←
📄

Are you sure you want to remove this attendee from the activity?

OK
Cancel

**Case**

- Customer: Build Construction
- Contact: Clere Zodvia
- Salesman: Judith Mudzengi
- Subject: New cement products

Information: New cement products

Value: 150000.0000

Case Type: CRMCTNEWSC Source Type: Referral

Case Date: 23 Aug 2019 Expected Completion: 30 Aug 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: Build Construction - BU10001

**Case State**

Case State: Cold Call (10%)

Percentage: 10%

**Activity**

- Type: Phone call
- Address: 3 Colinton Road Gillits Upper Highway KZN
- Subject: Market new products

Comments: Market new products

**Activity Attendees**

Attendees:

- ▶ Judith Mudzengi
- ▶ Clere Zodvia
- ▶ John Holland

Page 1 of 1 (3 items) Page size: 10

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

**Schedule**

Date: 22 Aug 2019 from 15:00 to 15:30

Reminder: Email  SMS  30 minutes before scheduled start

**+ Quote**

Save

- The attendee will be removed from the **Activity Attendee** section.

CRM BPO2 Test Environment
Judith Mudzengi

Save Activity
←
📄

**Case**

- Customer: Build Construction
- Contact: Clere Zodvia
- Salesman: Judith Mudzengi
- Subject: New cement products

Information: New cement products

Value: 150000.0000

Case Type: CRMCTNEWSC Source Type: Referral

Case Date: 23 Aug 2019 Expected Completion: 30 Aug 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: Build Construction - BU10001

**Case State**

Case State: Cold Call (10%)

Percentage: 10%

**Activity**

- Type: Phone call
- Address: 3 Colinton Road Gillits Upper Highway KZN
- Subject: Market new products

Comments: Market new products

**Activity Attendees**

Attendees:

- ▶ Judith Mudzengi
- ▶ Clere Zodvia

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 Aug 2019 from 15:00 to 15:30

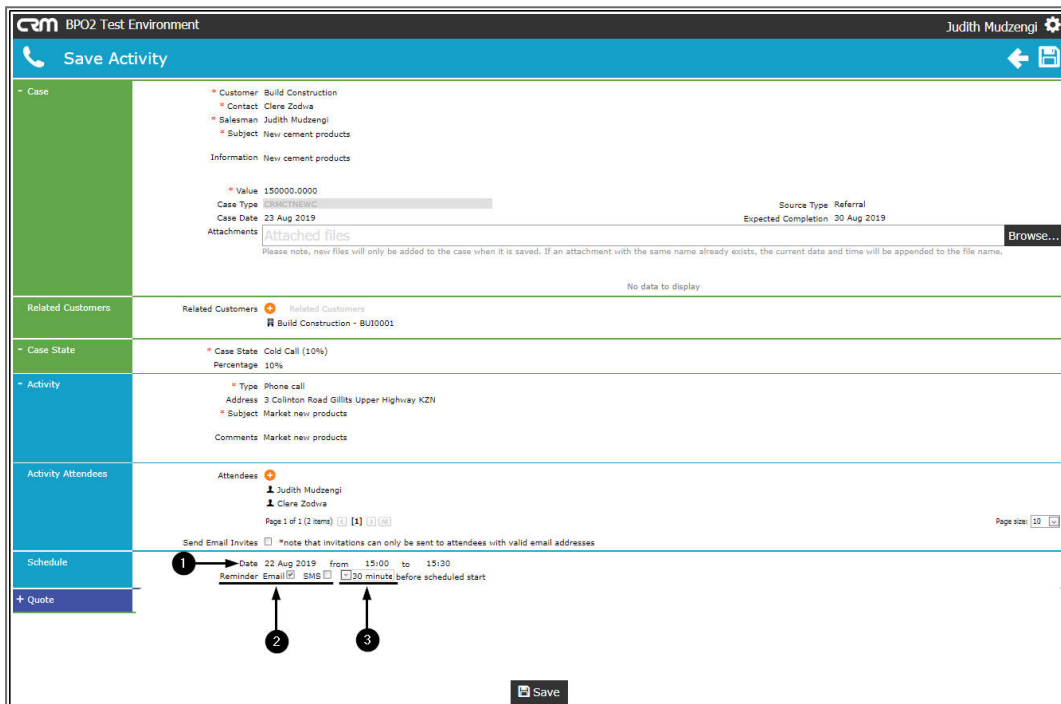
Reminder: Email  SMS  30 minutes before scheduled start

**+ Quote**

Save

## Scheduling

1. **Date** : You can change the **scheduled date** and or the **time** if applicable.
2. **Reminder** : Select either Email or SMS by ticking the relevant check box if applicable.
3. **Reminder (Time Period)** : Hover over the field, a **down arrow** will be displayed. Click on the **down arrow** and select the relevant time period from the **drop-down menu** if applicable.



## Quote Details

- You can **edit** quote details if applicable.

CRM BPO2 Test Environment
Judith Mudzengi

Save Activity

**Case** Subject: New cement products

**Case State** Case State: Cold Call (10%)  
Percentage: 10%

**Activity** Type: Phone call  
Address: 3 Colinton Road Gillits Upper Highway KZN  
Subject: Market new products  
Comments: Market new products

**Activity Attendees** Attendees: Judith Mudzengi, Clere Zodia  
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 Aug 2019 From: 15:00 to 15:00  
Reminder: Email  SMS  30 minutes before scheduled start

**Quote** \* A quote will only be created if you add quote line items.  
Quote settings: [Go to consumer defaults](#)   
Quote Contact: Clere Zodia Date: 27 Aug 2019  
Quote Reference:  Site: London  
Reference: Quote \* Print Layout: SALESQUOTE  
Comments: Quote

**Quote Financials** Currency: South African Rand Quote Terms: Cash on Delivery  
Tax Rate: 15.00 Commercial: Default  
Exchange Rate: 10.0000

**Add Quote Items** Add Item Type to find items...

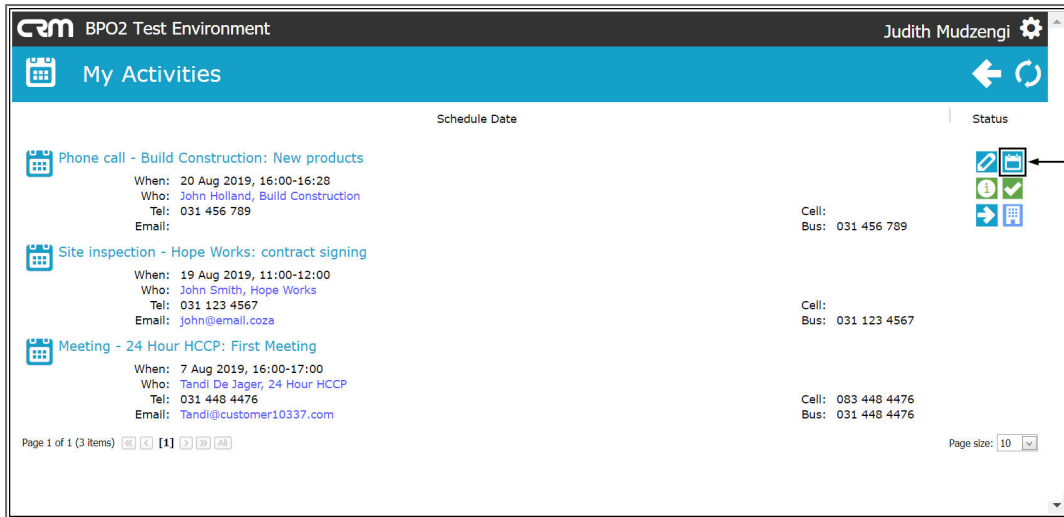
Quote Detail ID	Item Type	Item Code	Quote Item Description	Quantity	Unit Cost	Discount	Markup	Item Price	Payment per Period	Total	Actions	Total Inclusive	Suppress on Print	
1	INVN	ZHS08110	ACTUATOR MFP	1	0.00	0.00	0.00	1131.78		1131.78		1301.54		
2	INVN	FS-1018MFP	FS 1018MFP	1	0.00	0.00	0.00	726.18	726.18	726.18		835.11		
										1857.96	726.18	1857.96	2136.65	

## Save Changes

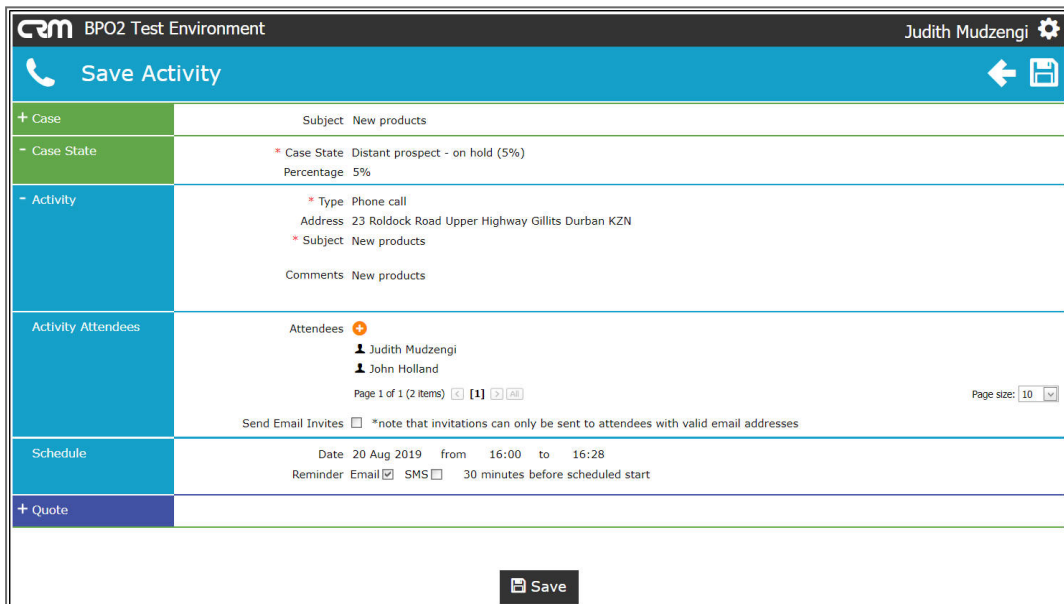
1. Click on either the **Save** button or
2. **Save** icon.







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



1. Go to the **Schedule** section.
2. You can adjust the **date** and or
3. **time**.

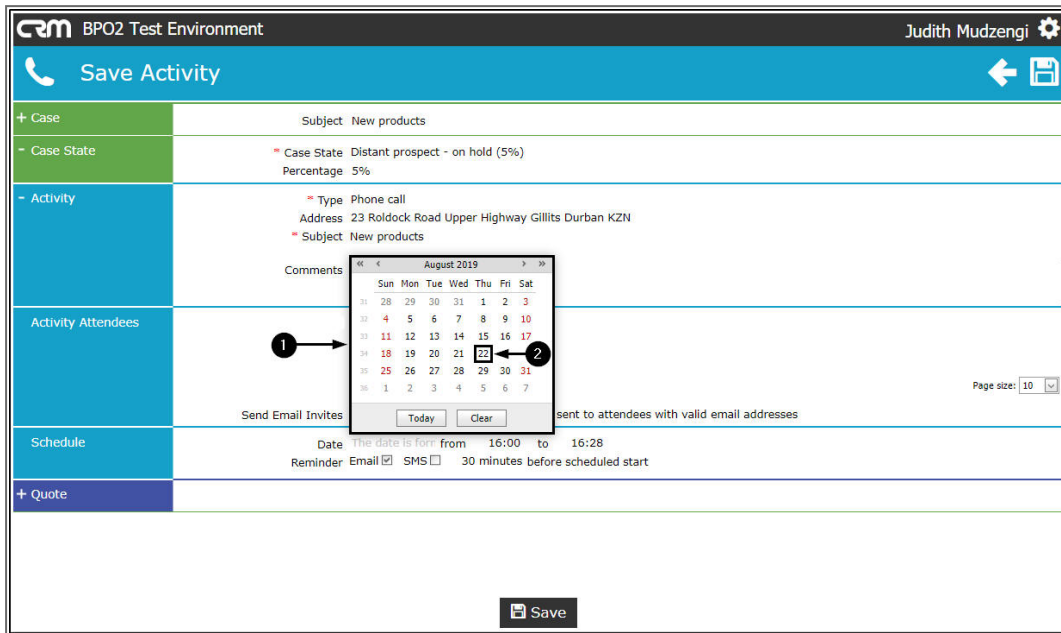
The screenshot shows the 'Save Activity' form in a CRM system. The form is titled 'Save Activity' and is set in the 'BPO2 Test Environment' for user 'Judith Mudzengi'. The form is divided into several sections: Case, Case State, Activity, Activity Attendees, Schedule, and Quote. The 'Case' section shows 'Subject: New products'. The 'Case State' section shows 'Case State: Distant prospect - on hold (5%)' and 'Percentage: 5%'. The 'Activity' section shows 'Type: Phone call', 'Address: 23 Roldock Road Upper Highway Gillits Durban KZN', 'Subject: New products', and 'Comments: New products'. The 'Activity Attendees' section shows 'Attendees: Judith Mudzengi, John Holland' and 'Page 1 of 1 (2 items)'. The 'Schedule' section shows 'Date: 20 Aug 2019', 'from: 16:00 to 16:28', and 'Reminder: Email [checked], SMS [unchecked], 30 minutes before scheduled start'. There are three numbered callouts: 1 points to the date field, 2 points to the date field, and 3 points to the time field. A 'Save' button is at the bottom.

## Adjust the Date

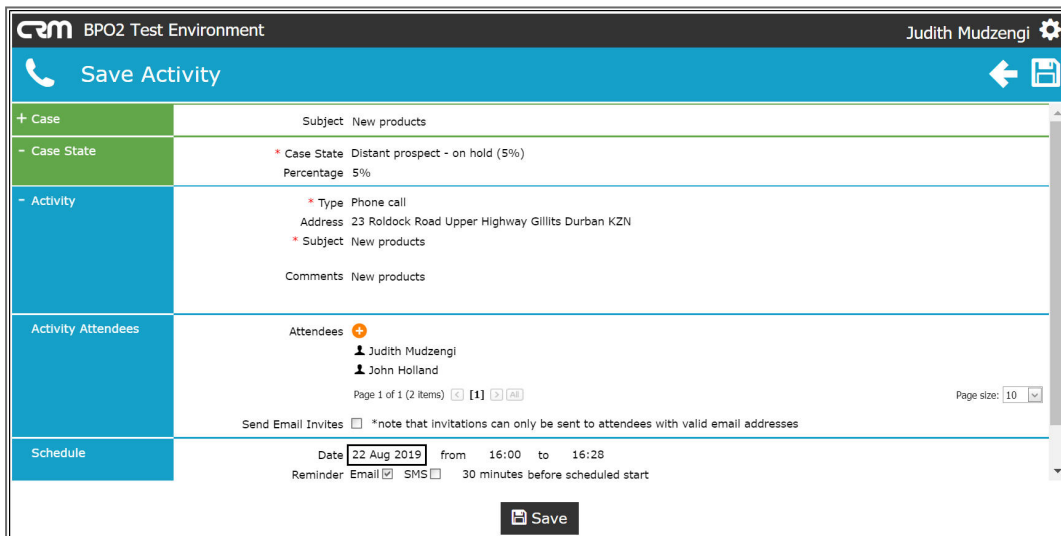
1. Hover over the **Date** field, a **down arrow** will be displayed. Click on this **arrow**.

This screenshot is identical to the previous one, but with a dropdown arrow appearing over the date field '20 Aug 2019'. A callout '1' points to this arrow, indicating the next step in the process.

1. A **calendar** will pop up.
2. Select the relevant date.

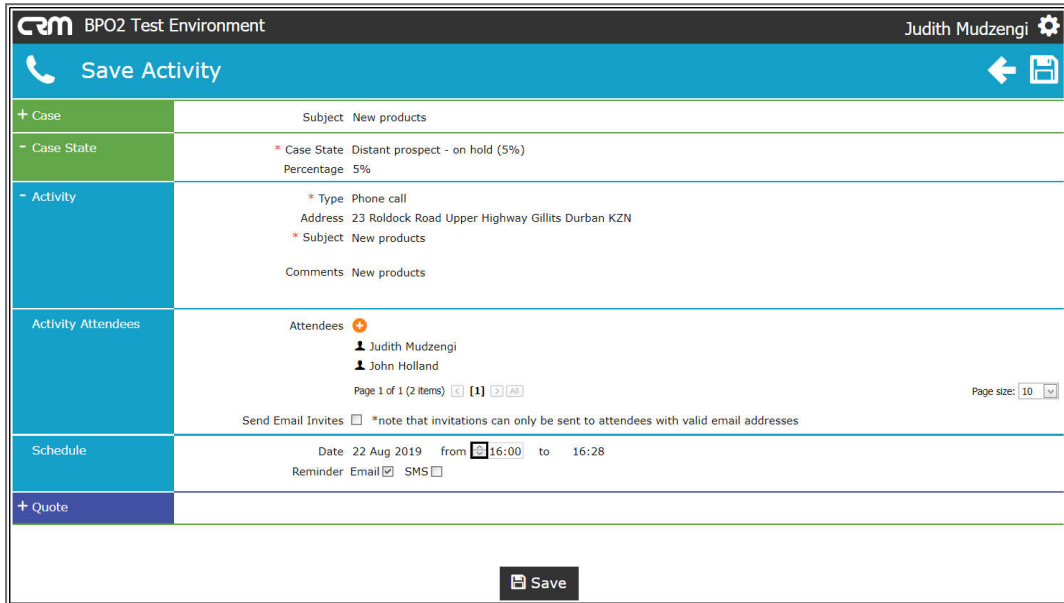


- The **Date** field will now be populated with the selected date.



## Adjust the Time

- **From:** Either hover over the field and click on the **directional arrows** to adjust the time or
- type in the relevant time.



The screenshot shows a CRM interface for 'Save Activity' in a 'BPO2 Test Environment'. The user is identified as 'Judith Mudzengi'. The form is divided into several sections:

- Case:** Subject: New products
- Case State:** Case State: Distant prospect - on hold (5%)  
Percentage: 5%
- Activity:** Type: Phone call  
Address: 23 Roldock Road Upper Highway Gillits Durban KZN  
Subject: New products  
Comments: New products
- Activity Attendees:** Attendees: Judith Mudzengi, John Holland  
Page 1 of 1 (2 items) | Page size: 10
- Schedule:** Date: 22 Aug 2019 from 16:00 to 16:28  
Reminder Email  SMS

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

- **To :** Either hover over the field and click on the **up and down arrows** to adjust the time or
- type in the relevant time.

**CRM BPO2 Test Environment** Judith Mudzengi

**Save Activity**

**+ Case** Subject New products

**- Case State** \* Case State Distant prospect - on hold (5%)  
Percentage 5%

**- Activity** \* Type Phone call  
Address 23 Roldock Road Upper Highway Gillits Durban KZN  
\* Subject New products  
Comments New products

**Activity Attendees** Attendees +  
↓ Judith Mudzengi  
↓ John Holland  
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 Aug 2019 from 15:00 to 16:28  
Reminder Email  SMS  30 minutes before scheduled start

**+ Quote**

**Save**

- Click on either the **Save** button or
- **Save** icon.

**CRM BPO2 Test Environment** Judith Mudzengi

**Save Activity**

**+ Case** Subject New products

**- Case State** \* Case State  Distant prospect - on hold (5%)  
Percentage 5%

**- Activity** \* Type Phone call  
Address 23 Roldock Road Upper Highway Gillits Durban KZN  
\* Subject New products  
Comments New products

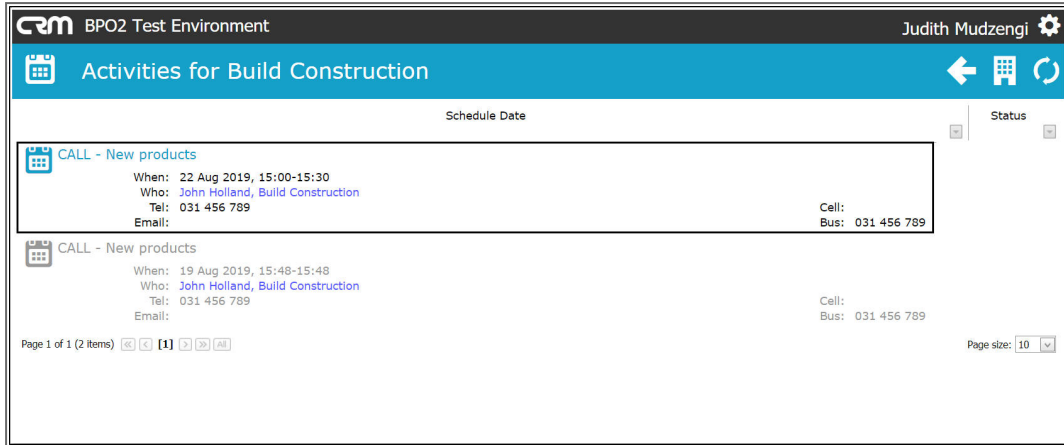
**Activity Attendees** Attendees +  
↓ Judith Mudzengi  
↓ John Holland  
Page 1 of 1 (2 items) [1] [ ] [ ] [ ]  
Send Email Invites  \*note that invitations can only be sent to attendees with valid email addresses

**Schedule** Date 22 Aug 2019 from 15:00 to 15:30  
Reminder Email  SMS  30 minutes before scheduled start

**+ Quote**

**Save**

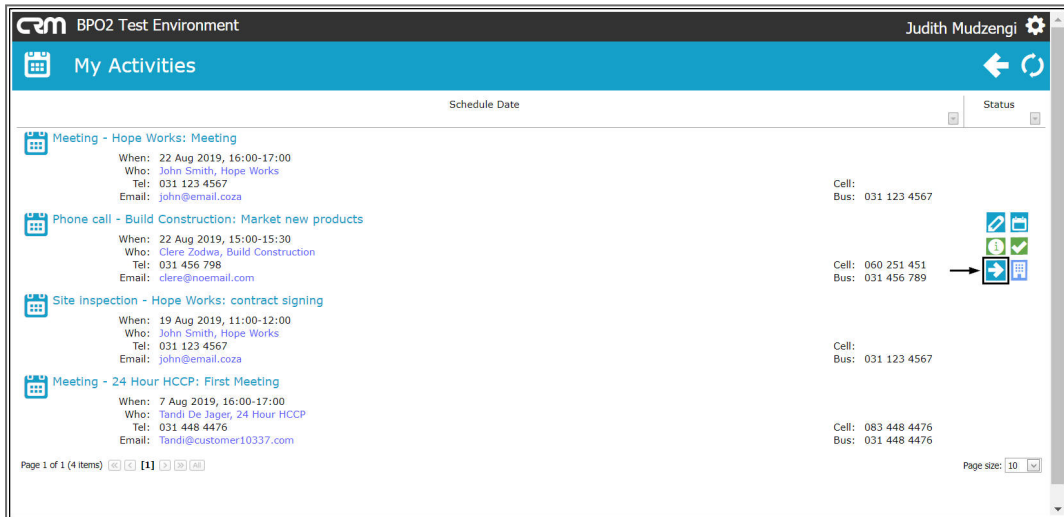
- The **Activities for [ ]** screen will be displayed.
- The rescheduled activity will be displayed in this screen.



## NEXT ACTION

This allows you to close a current activity and create a new activity.

- Click on the **Next Action** icon.



- The **Next Activity** screen will be displayed.
  1. Click on the ' + ' sign to view more details or click on the ' - ' sign to view less details.
  2. The current case / activity details will auto populate but you can edit the details if you wish to.

3. Type in the relevant **completion notes** of the current activity.

CRM BPO2 Test Environment Judith Mudzengi

Next Activity

Case: Subject New cement products

Case State: \* Case State Cold Call (10%) Percentage 10%

Completed Activity: Summary Clere Zodwa - Build Construction Market new products 2019/08/22 3:00 PM-3:30 PM

Notes: Completion notes about activity

New Activity: \* Type activity type \* Subject The subject of the activity Address 3 Colinton Road Gillits Upper Highway KZN

Comments: information relating to the activity

Activity Attendees: Attendees Judith Mudzengi Clere Zodwa

Schedule: Date 27 Aug 2019 from 16:00 to 17:00

Reminder: Reminder Email SMS 30 minutes before scheduled start

Save

1. **Update** the new activity information.
2. Click on either the **Save** button or
3. **Save** icon.

CRM BPO2 Test Environment Judith Mudzengi

Next Activity

Case: Subject New cement products

Case State: \* Case State Cold Call (10%) Percentage 10%

Completed Activity: Summary Clere Zodwa - Build Construction Market new products 2019/08/22 3:00 PM-3:30 PM

Notes: Meeting was successful. Next activity - site visit

New Activity: \* Type Site inspection Address 3 Colinton Road Gillits Upper Highway KZN

Subject Site Inspection

Comments Site Inspection

Activity Attendees: Attendees Judith Mudzengi Clere Zodwa

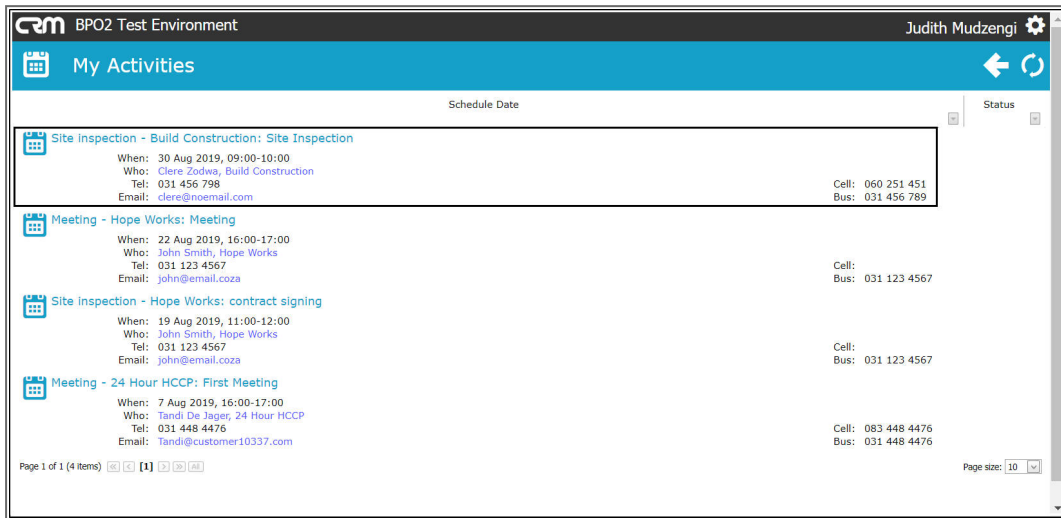
Schedule: Date 30 Aug 2019 from 09:00 to 10:00

Reminder: Reminder Email SMS 30 minutes before scheduled start

Save

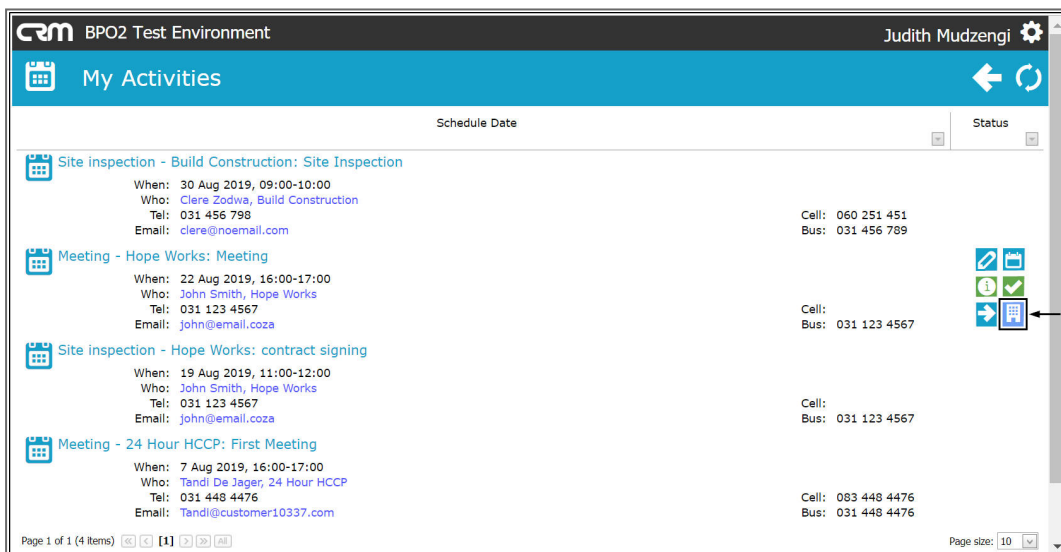


- The **My Activities** screen will be displayed.
- The completed activity will be removed from this screen.
- The new activity will be displayed in this screen.



## VIEW CUSTOMER

- Click on the **View Customer** icon.



- The **Customer Dashboard** will be displayed.
- You can now view the selected customer's details.

**Customer Dashboard** | Judith Mudzengi

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Nothing to display			

Performance: 0.00 to 1.00

Pipeline: Fetching data...

**Hope Works - HOP0001**

Trading Name: Hope Works  
 Registered Name: Hope Works  
 Description: Hope Works  
 VAT No:  
 Rank: Silver  
 Website: http://  
 Phone: 031 123 4567

75%

12 Months Sales History

Month	Contract Income	Sales Revenue
August 2019	0.00	0.00
September 2019	0.00	0.00
October 2019	0.00	0.00
November 2019	0.00	0.00
December 2019	0.00	0.00
January 2020	0.00	0.00
February 2020	0.00	0.00
March 2020	0.00	0.00
April 2020	0.00	0.00
May 2020	0.00	0.00
June 2020	0.00	0.00
July 2020	0.00	0.00
August 2020	0.00	0.00

## OTHER ACTION ITEMS

You can also

- [View Case Info and History](#)

**My Activities** | Judith Mudzengi

Schedule Date | Status

<b>Site inspection - Build Construction: Site Inspection</b> When: 30 Aug 2019, 09:00-10:00 Who: Clere Zedwa, Build Construction Tel: 031 456 798 Email: clere@noemail.com	Cell: 060 251 451 Bus: 031 456 789
<b>Meeting - Hope Works: Meeting</b> When: 22 Aug 2019, 16:00-17:00 Who: John Smith, Hope Works Tel: 031 123 4567 Email: john@email.coza	Cell: Bus: 031 123 4567
<b>Site inspection - Hope Works: contract signing</b> When: 19 Aug 2019, 11:00-12:00 Who: John Smith, Hope Works Tel: 031 123 4567 Email: john@email.coza	Cell: Bus: 031 123 4567
<b>Meeting - 24 Hour HCCP: First Meeting</b> When: 7 Aug 2019, 16:00-17:00 Who: Tandi De Jager, 24 Hour HCCP Tel: 031 448 4476 Email: Tandi@customer10337.com	Cell: 083 448 4476 Bus: 031 448 4476

Page 1 of 1 (4 items) | Page size: 10

and

- [Close a Case.](#)

The screenshot shows a web interface for 'My Activities' in a CRM system. The header includes the CRM logo, 'BPO2 Test Environment', and the user name 'Judith Mudzengi'. The main content area lists four activities, each with a calendar icon, a title, and detailed information including date, time, organizer, and contact details. A sidebar on the right contains navigation icons, and the bottom of the page shows pagination and page size controls.

Activity Title	When	Who	Tel	Email	Cell	Bus
Site Inspection - Build Construction: Site Inspection	30 Aug 2019, 09:00-10:00	Clere Zodwa, Build Construction	031 456 798	clere@noemail.com	060 251 451	031 456 789
Meeting - Hope Works: Meeting	22 Aug 2019, 16:00-17:00	John Smith, Hope Works	031 123 4567	john@email.co.za		031 123 4567
Site Inspection - Hope Works: contract signing	19 Aug 2019, 11:00-12:00	John Smith, Hope Works	031 123 4567	john@email.co.za		031 123 4567
Meeting - 24 Hour HCCP: First Meeting	7 Aug 2019, 16:00-17:00	Tandi De Jager, 24 Hour HCCP	031 448 4476	Tandi@customer10337.com	083 448 4476	031 448 4476

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