

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

SALES CONNECT

INTRODUCTION AND INDEX

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

The functionality includes:

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

The system enhances the effective management and reporting on the sales performance in the field by:

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

CONFIGURATION NOTES

CONNECTIVITY

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

format.

ADDITIONAL INFORMATION

The salesperson must complete / end an activity on the app before being able to start a new activity.

Related Topics

- [Sales Connect: Download and Log In and Out](#)
- [Sales Connect: Environment](#)
- [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](#)

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