

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

SALES CONNECT

LOG START AND END TRAVEL

You can log **Start** and **End Travel** details to a **Meeting** Activity directly in Sales Connect. This functionality will record the odometer reading at the beginning and the end of the salesman's journey

SELECT THE ACTIVITY THAT REQUIRES TRAVEL DETAILS TO BE LOGGED

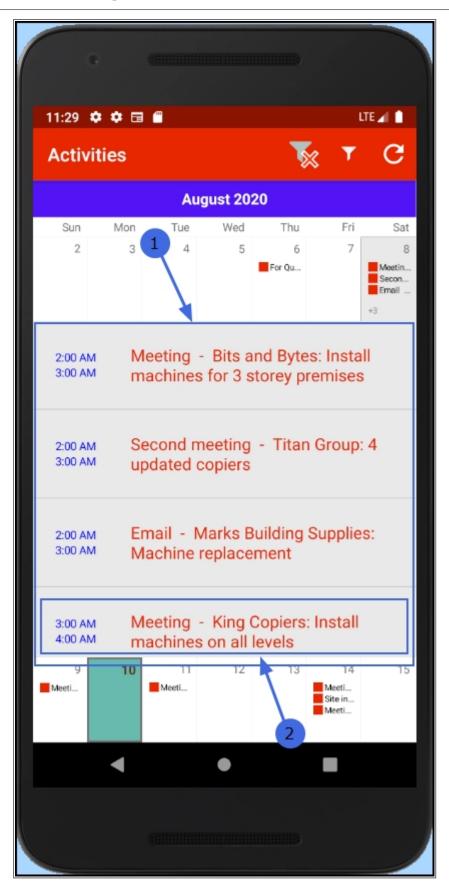
- 1. After <u>initial login</u> to Sales Connect, the Activities screen will open. This will display a **calendar view** of the current month.
 - i. Swipe left to view future months.
 - ii. Swipe right to view **previous** months.
- 2. Tap on the **date** that contains the Activity that you wish to log **Travel Details** for.







- 1. A **text box** will pop up, with more information regarding the activity linked to that date. (In this example there is <u>more than 1 activity</u> on this date and therefore more than 1 text box.)
- 2. Tap on the text box that pertains to the specific activity that you wish to log travel details against.

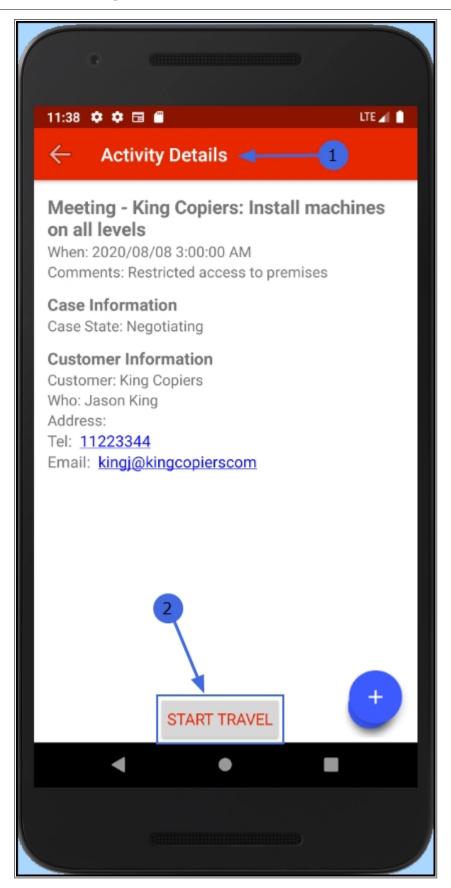




THE ACTIVITY DETAILS SCREEN

- 1. The **Activity Details** screen will be displayed.
- 2. Tap on the **Start Travel** button.







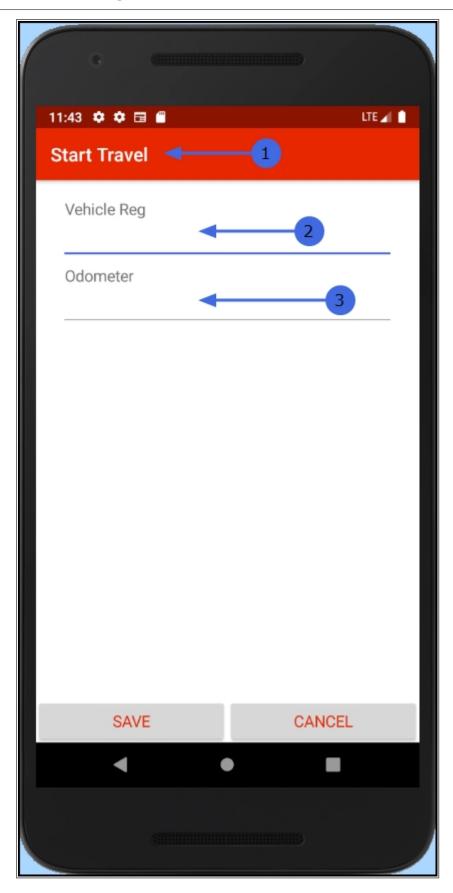
THE START TRAVEL SCREEN

1. The **Start Travel** screen will be displayed

Note: As you tap in any editable text field, your device keyboard will pop up.

- 2. Type in the vehicle **registration number**.
- 3. Type in the current **odometer** reading.





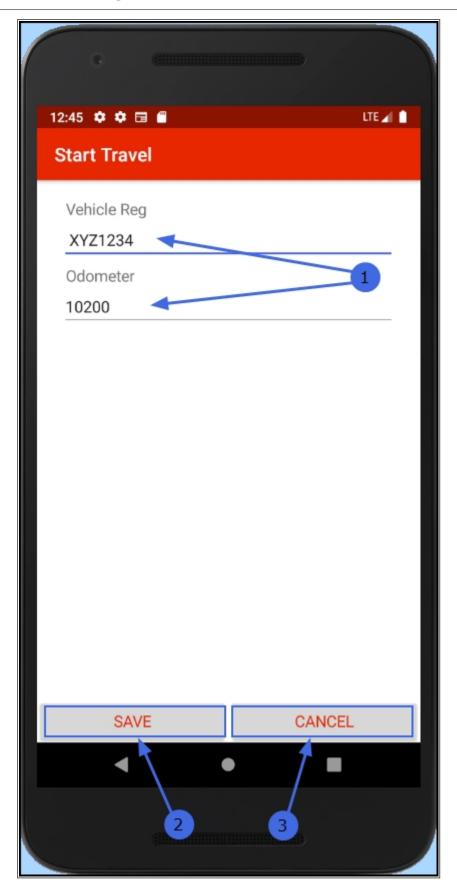


SAVE THE START TRAVEL DETAILS

- 1. When you have finished adding the start travel log, either
- 2. Tap on **Save** to retain the information, or
- 3. tap on **Cancel** to return to the Activity Details screen.

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





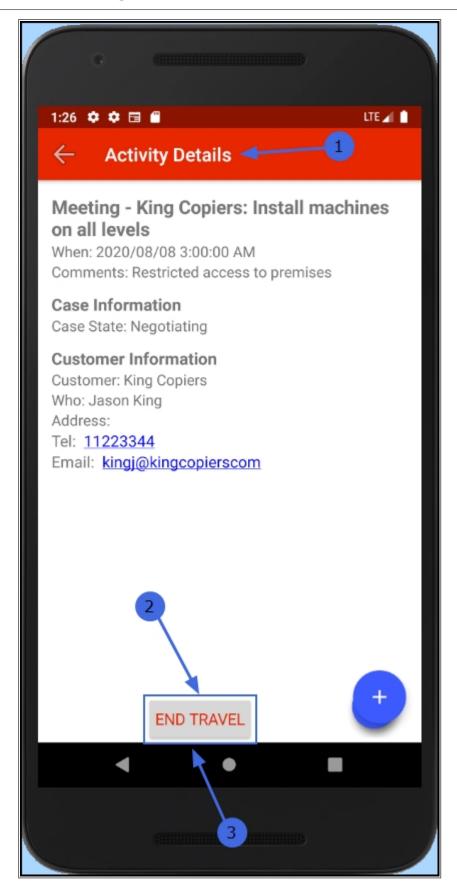


1. You will return to the **Activity Details** screen.

END TRAVEL

- 2. You will note that the Travel button has updated to **End Travel**.
- 3. When you are ready to record the **End Travel** details click on this button

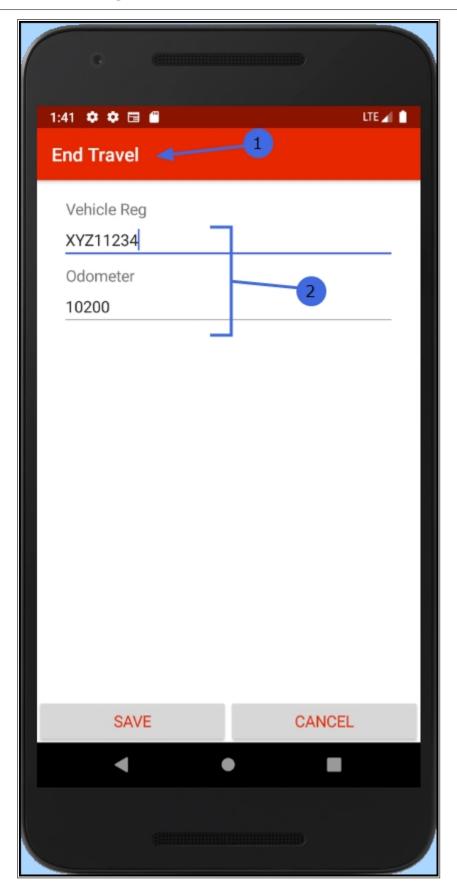






- 1. The **End Travel** screen will be displayed.
- 2. You will note that the **Vehicle Reg** number field and the **Odometer** field will be auto populated with the details entered in the <u>Start Travel</u> screen. This will ensure that you do not enter a different vehicle number by mistake and will remind you of the **start** travel reading, so that you are sure to enter a higher **end** travel reading.



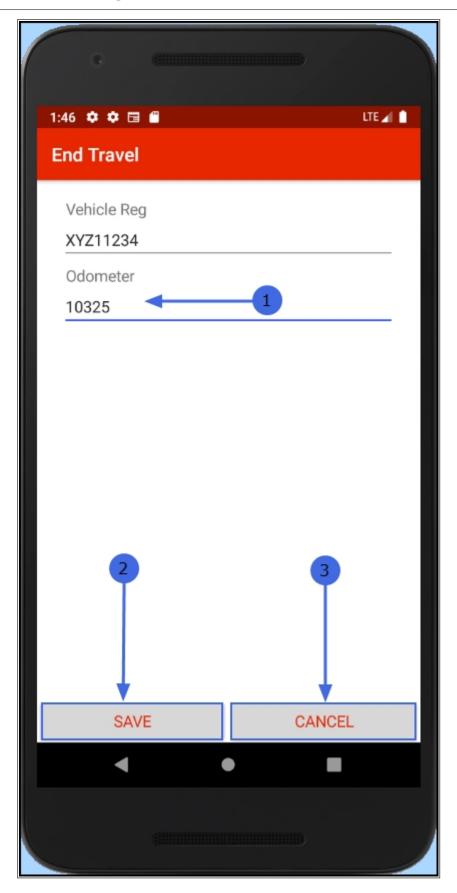




- 1. When you have updated the **Odometer** reading.
- 2. Tap on **Save** to keep the changes or
- 3. tap on Cancel to return to the Activity Details screen.

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

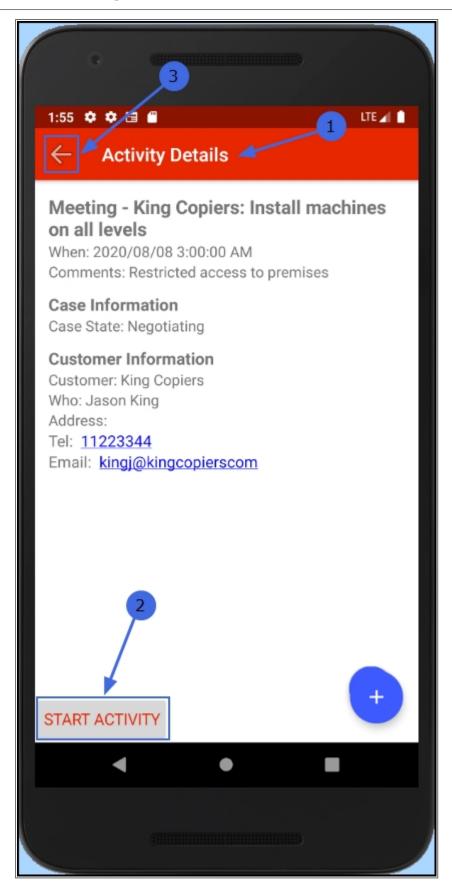






- 1. You will return to the **Activity Details** screen.
- 2. The **Start Activity** button will now be available in this screen.
- 3. Tap on **Back** to return to the calendar in the **Activities** screen.







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 Add Notes to an Activity
- CRM

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