

CRM BASICS

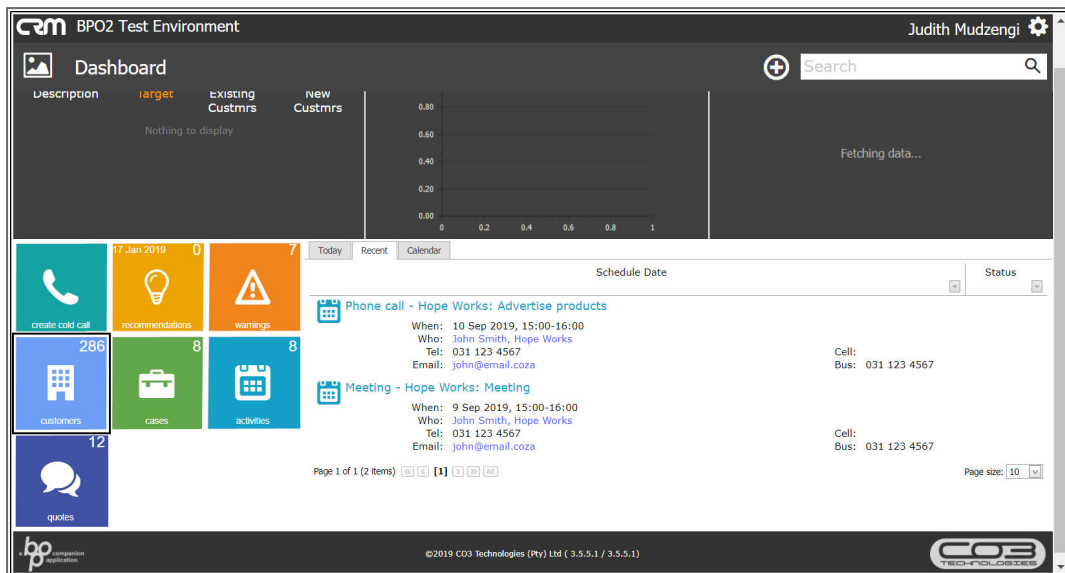
COLD CALL

- A Cold Call is a quick and easy way to raise a new Customer, Contact, Address, Case and Activity.
- A Cold Call can also be created for existing customers.
- A Cold Call for New or Existing Customers can be created from the **Homepage** or the **Customer Homepage**. Either of these processes will direct you to the Create Cold Call screen with the Customer frame clear of any details.
- A **Create Cold Call for Customer** Action button has been added to the Customer Dashboard Information frame. Navigating from this button will auto populate the selected Customer Details.

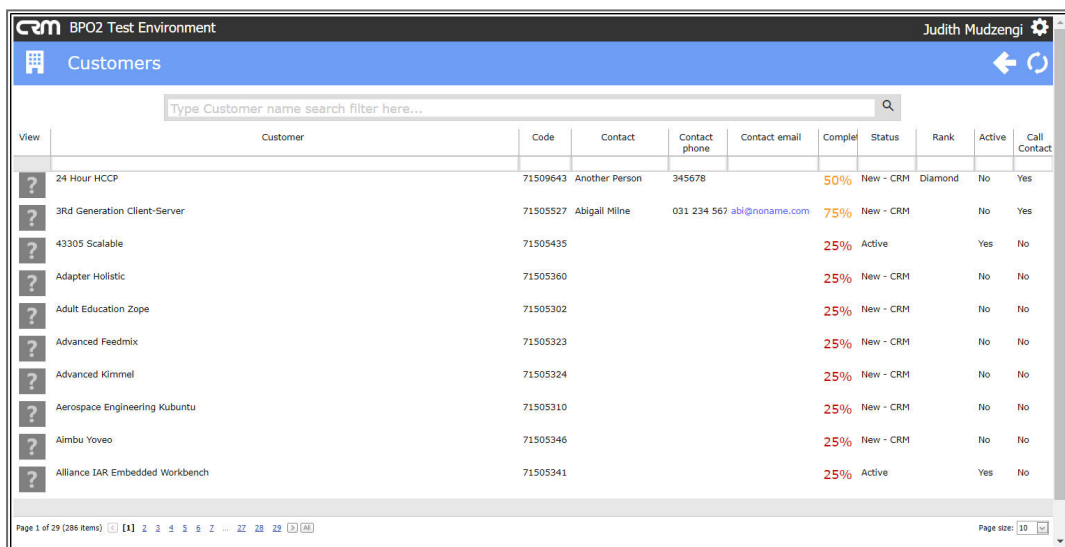
Ribbon Access: Webpage > [http://\[servername\]:\[port-no\]/BPOCRM/User.aspx](http://[servername]:[port-no]/BPOCRM/User.aspx)

ACCESS COLD CALLS FROM CUSTOMER DASHBOARD

- Click on the **Customers** tile from the **Dashboard**.

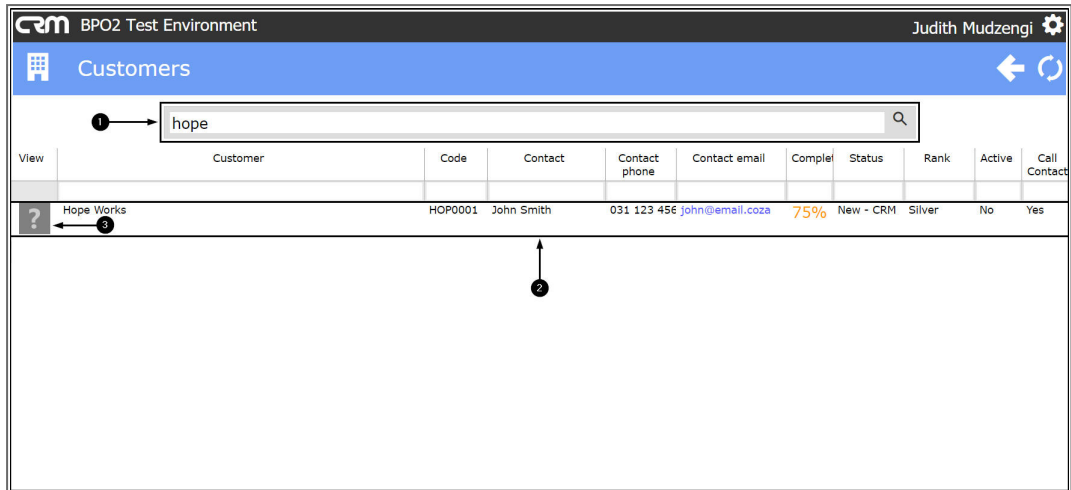


- The **Customers** screen will be displayed.
- A list of customers will be displayed.



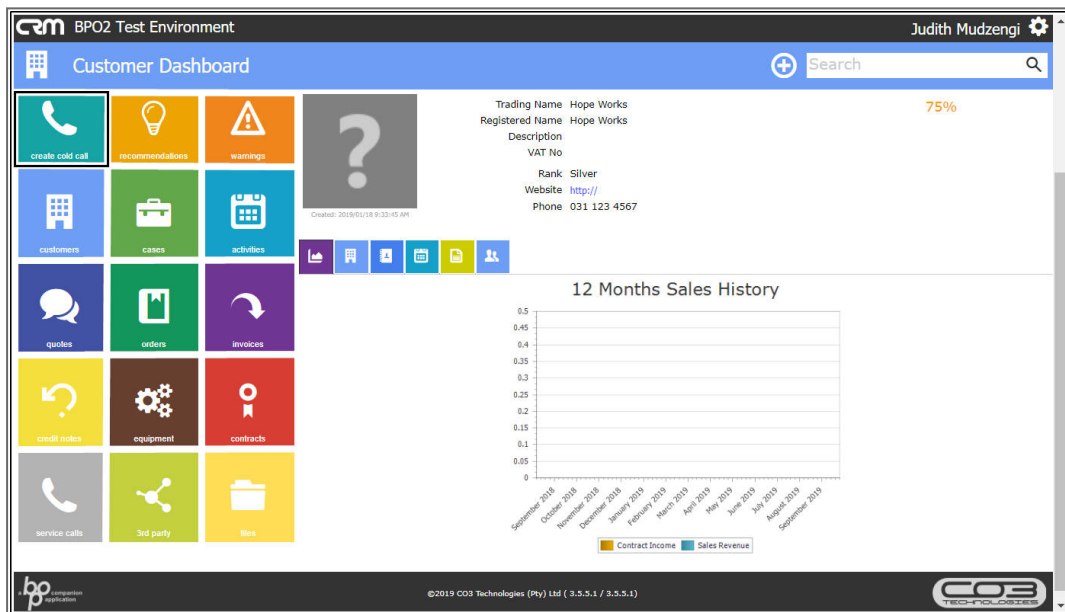
View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
?	24 Hour HCCP	71509643	Another Person	345678		50%	New - CRM	Diamond	No	Yes
?	3rd Generation Client-Server	71505527	Abigail Milne	031 234 567	abi@noname.com	75%	New - CRM		No	Yes
?	43305 Scalable	71509435				25%	Active		Yes	No
?	Adapter Holistic	71505360				25%	New - CRM		No	No
?	Adult Education Zope	71505302				25%	New - CRM		No	No
?	Advanced Feedmix	71505323				25%	New - CRM		No	No
?	Advanced Kimmel	71505324				25%	New - CRM		No	No
?	Aerospace Engineering Kubuntu	71505310				25%	New - CRM		No	No
?	Almbu Yoveo	71505346				25%	New - CRM		No	No
?	Alliance IAR Embedded Workbench	71505341				25%	Active		Yes	No

1. Type in the **customer name** that you wish to create a cold call for in the **Search** bar.
2. The system will filter for and display that customer in the list.
3. Click on the **Customer icon** in the **View** column.



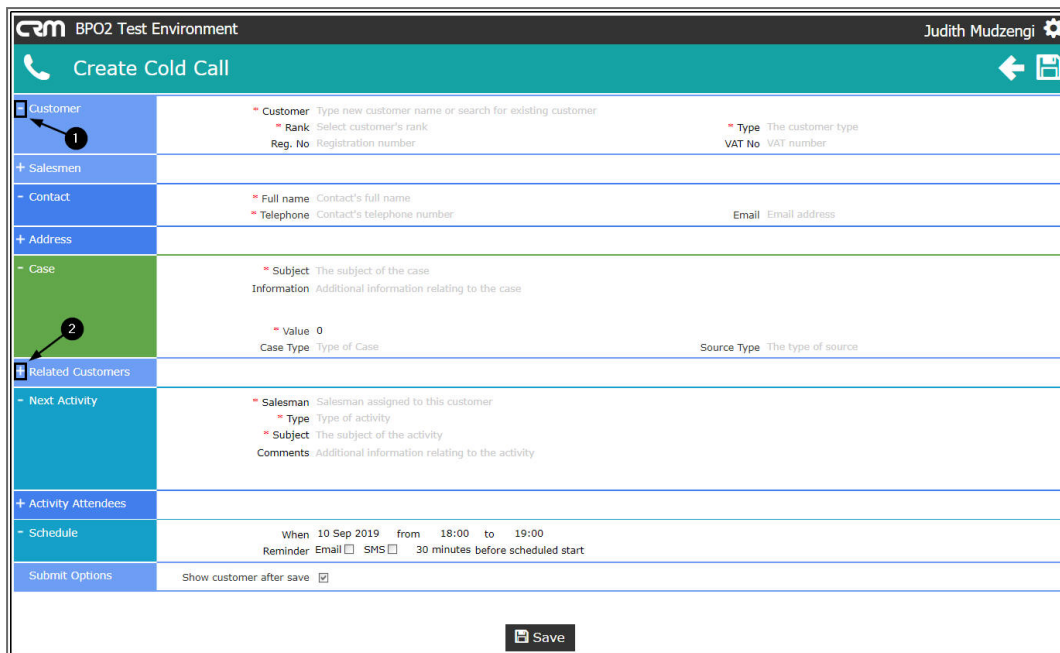
The **Customer Dashboard** screen will be displayed.

- Click on the **Create Cold Call** tile.



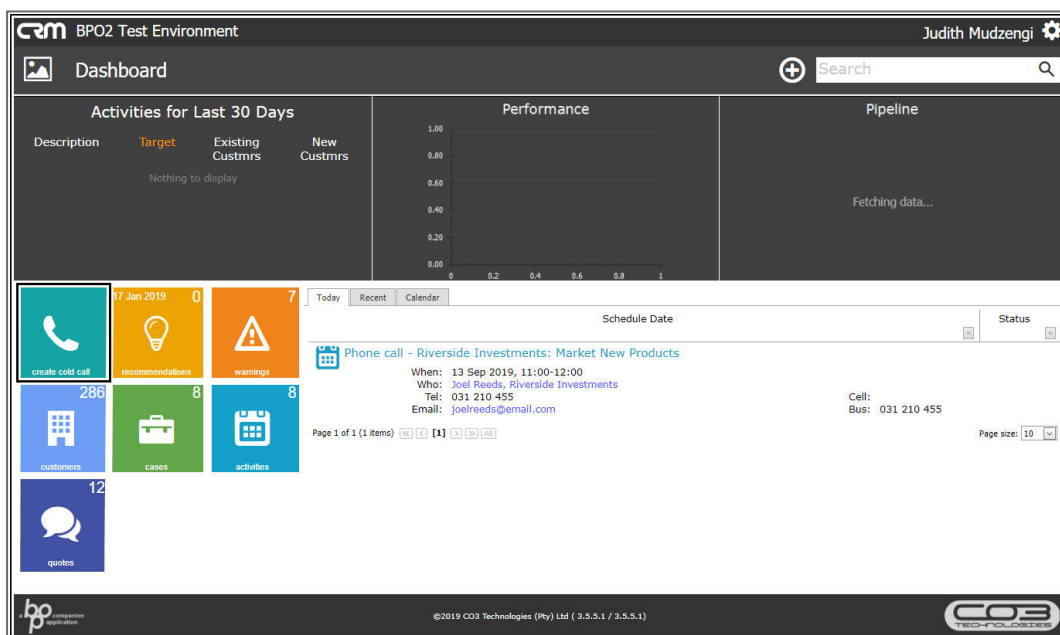
The **Create Cold Call** screen will be displayed.

1. Click on the [-] sign to view more details.
2. Click on the [+] sign to view less details.



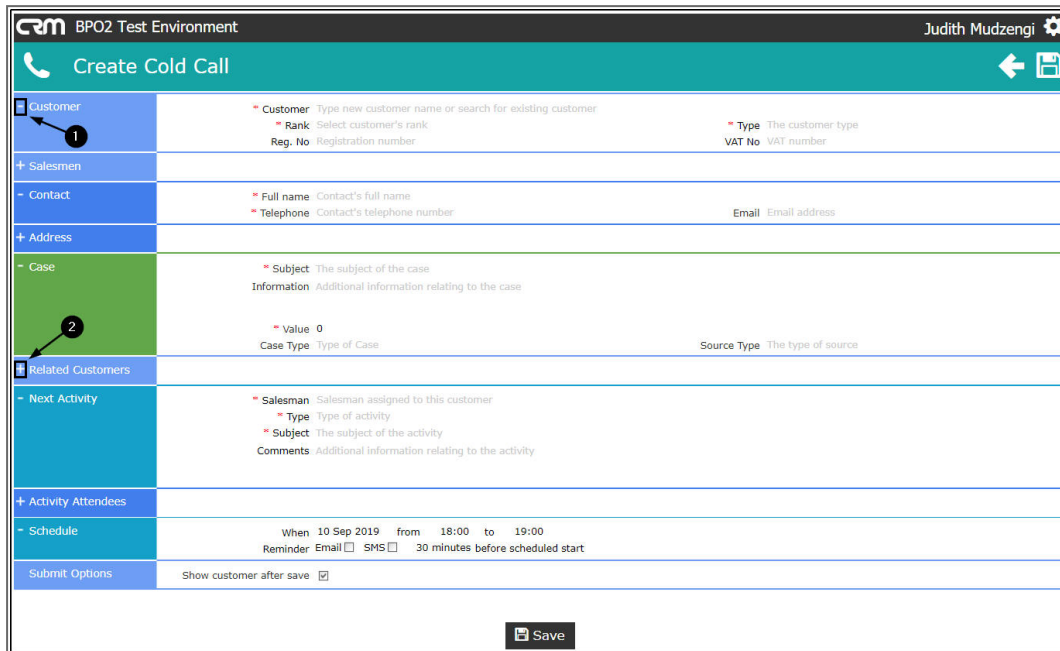
ACCESS COLD CALLS FROM THE DASHBOARD

1. Click on the **Create Cold Call** in the **Dashboard** (Home page).



The **Create Cold Call** screen will be displayed.

1. Click on the [-] sign to view more details.
2. Click on the [+] sign to view less details.



CREATE COLD CALL FOR NEW CUSTOMER

Customer F rame

- **Customer:**
 1. For a new customer, type in the Customer Name.
 2. As you type, companies with similar names will appear to help prevent duplicates.

CRM BPO2 Test Environment Judith Mudzengi

Create Cold Call

Customer

Customer: **Rank** **Reg. No** **Type** **VAT No**

Salesmen

Contact

Address

Case

Subject The subject of the case
Information Additional information relating to the case

Value 0
Case Type Type of Case Source Type The type of source

Related Customers

Next Activity

Salesman Salesman assigned to this customer
Type Type of activity
Subject The subject of the activity
Comments Additional information relating to the activity

Activity Attendees

Schedule

When 11 Sep 2019 from 11:00 to 12:00
Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

Submit Options

Show customer after save ☒

Save

- **Rank:** Click on the **drop-down arrow** and select the relevant rank.
- **Reg No:** Type in the company registration no, if applicable.
- **Type:** Click on the **drop-down arrow** and select the relevant type.
- **VAT No:** Type in the company VAT number, if applicable.

CRM BPO2 Test Environment Judith Mudzengi

Create Cold Call

Customer

Customer: **Rank** **Reg. No** **Type** **VAT No**

Salesmen

Contact

Address

Case

Subject The subject of the case
Information Additional information relating to the case

Value 0
Case Type Type of Case Source Type The type of source

Related Customers

Next Activity

Salesman Judith Mudzengi
Type Type of activity
Subject The subject of the activity
Comments Additional information relating to the activity

Activity Attendees

Schedule

When 11 Sep 2019 from 12:00 to 13:00
Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

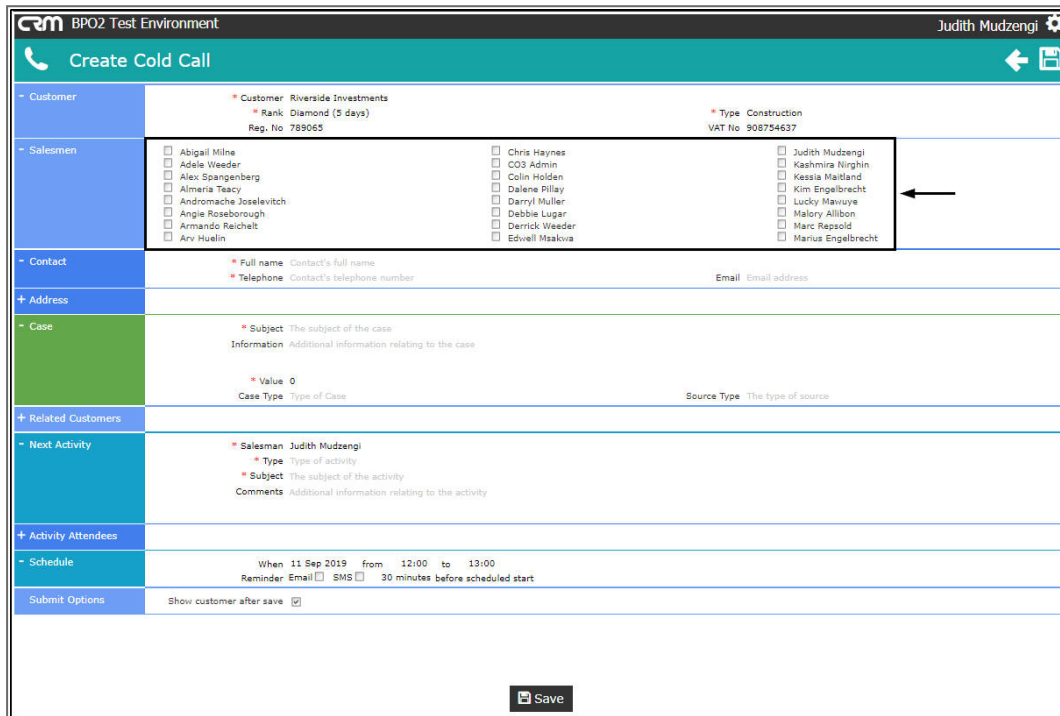
Submit Options

Show customer after save ☒

Save

Salesmen Frame

- Select the checkboxes in front of the salesmen that will be linked to this customer. These marked salesmen will be available for selection if you are raising this cold call to assign to another salesman.



CRM BPO2 Test Environment Judith Mudzengi

Create Cold Call

Customer
 * Customer: Riverside Investments
 * Rank: Diamond (5 days)
 Reg. No: 789065
 * Type: Construction
 VAT No: 908754637

Salesmen

☐ Abigail Milne	☐ Chris Haynes	☐ Judith Mudzengi
☐ Adele Weeder	☐ CO3 Admin	☐ Kashmira Nigthin
☐ Alex Spangenberg	☐ Colin Holden	☐ Kassia Maitland
☐ Almeria Teacy	☐ Dalene Pillay	☐ Kim Engelbrecht
☐ Andromache Joselevitch	☐ Darryl Muller	☐ Lucky Mavuye
☐ Angie Roseborough	☐ Debbie Lugar	☐ Malory Allibon
☐ Armando Reichelt	☐ Derrick Weeder	☐ Marc Rapsold
☐ Ary Huelin	☐ Edvell Mskova	☐ Marius Engelbrecht

Contact
 * Full name: Contact's full name
 * Telephone: Contact's telephone number
 Email: Email address

Address

Case
 * Subject: The subject of the case
 Information: Additional information relating to the case
 * Value: 0
 Case Type: Type of Case
 Source Type: The type of source

Related Customers

Next Activity
 * Salesman: Judith Mudzengi
 * Type: Type of activity
 * Subject: The subject of the activity
 Comments: Additional information relating to the activity

Activity Attendees

Schedule
 When: 11 Sep 2019 from 12:00 to 13:00
 Reminder: Email ☐ SMS ☐ 30 minutes before scheduled start

Submit Options
 Show customer after save ☒

Save

Contact Frame

- **Full Name:** Type in the full name of the customer contact.
- **Telephone:** Type in the telephone number of the customer contact.
- **Email Address:** Type in the email address of the customer contact.

CRM BPO2 Test Environment

Judith Mudzengi

Create Cold Call

Customer

Customer Riverside Investments

Rank Diamond (5 days)

Reg. No 789065

Type Construction

VAT No 908754637

Salesmen

☒ Abigail Hillne
☐ Adele Weeder
☐ Alex Spangenberg
☒ Almeria Teacy
☐ Andromache Joselevitch
☐ Angie Roseborough
☐ Armando Reichelt

☐ Chris Haynes
☒ CO3 Admin
☐ Colin Holden
☐ Dalene Pillay
☐ Darryl Muller
☐ Debbie Lugar
☐ Derrick Weeder

☒ Judith Mudzengi
☐ Kashmira Nirghin
☐ Kessia Maltland
☐ Kim Engelbrecht
☐ Lucky Mawuye
☐ Malory Allibon
☐ Marc Repsold

Contact

Full name Contact's full name

Telephone Contact's telephone number

Email Email address

Address

Case

Subject The subject of the case

Information Additional information relating to the case

Value 0

Case Type Type of Case

Source Type The type of source

Related Customers

Next Activity

Salesman Judith Mudzengi

Type Type of activity

Subject The subject of the activity

Comments Additional information relating to the activity

Activity Attendees

Schedule

When 12 Sep 2019 from 11:00 to 12:00

Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

Save

Address Frame

- **Existing:** Click on the drop-down arrow and select **New**.
- **Address Line 1 and 2:** Type in the relevant customer address details.
- **Suburb:** Type in the name of the suburb.
- **City:** Type in the city.
- **Province / State:** Type in the Province / State.
- **Post Code:** Type in the postal code.
- **Country:** Type in the country.

CRM BPO2 Test Environment

Judith Mudzengi

Create Cold Call

Customer

Customer Riverside Investments

Rank Diamond (5 days)

Reg. No 789065

Type Construction

VAT No 908754637

Salesmen

☒ Abigail Milne
☐ Adele Weeder
☐ Alex Spangenberg
☒ Almeria Teacy
☐ Andromache Joselevitch
☐ Angie Roseborough
☐ Armando Reichelt
☐ Ary Huelin

☐ Chris Haynes
☒ CO3 Admin
☐ Colin Holden
☐ Dalene Pillay
☐ Darryl Muller
☐ Debbie Luger
☐ Derrick Weeder
☐ Edvelli Msakva

☒ Judith Mudzengi
☐ Kashmira Nirghin
☐ Kessia Maitland
☐ Kim Engelbrecht
☐ Lucky Mawuye
☐ Malory Allibon
☐ Marc Rapsold
☐ Marius Engelbrecht

Contact

Full name Joel Reeds

Telephone 031 210 455

Email joelreeds@email.com

Address

Existing Address for the contact

Address Line 1 Address Line 1

Address Line 2 Address Line 2

Suburb Suburb

City City

Province/State Province/State

Post Code Post Code

Country Country...

Case

Subject The subject of the case

Information Additional information relating to the case

Value 0

Case Type Type of Case

Source Type The type of source

Related Customers

Next Activity

Salesman Judith Mudzengi

Type Type of activity

Subject The subject of the activity

Comments Additional information relating to the activity

Activity Attendees

Schedule

When 12 Sep 2019 from 11:00 to 12:00

Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

Submit Options

Show customer after save ☒

Save

Case Frame

- **Subject:** Type in the subject of the case.
- **Information:** Type in additional information relating to the case if applicable.
- **Value:** Type in the estimated value of the case.
- **Case Type:** Click on the drop-down arrow and select from the list, the relevant case type.
- **Source Type:** (Where did you obtain this customer contact e.g. was this customer 'recommended' or 'referred'.) Click on the drop-down arrow and select from the list, the relevant source type.

CRM BPO2 Test Environment

Judith Mudzengi

Create Cold Call

Customer

Customer: Riverside Investments

Rank: Diamond (5 days)

Reg. No: 789065

Type: Construction

VAT No: 908754637

Salesmen

☒ Abigail Milne
☐ Adele Weeder
☐ Alex Spangenberg
☒ Almeria Teacy
☐ Andromache Joselevitch
☐ Angie Roseborough
☐ Armando Reichelt
☐ Arv Huelin

☐ Chris Haynes
☒ CO3 Admin
☐ Colin Holden
☐ Dalene Pillay
☐ Darryl Muller
☐ Debbie Lagan
☐ Derrick Weeder
☐ Edwell Meakiva

☒ Judith Mudzengi
☐ Kashmire Ringhin
☐ Kessia Maitland
☐ Kim Engelbrecht
☐ Lucky Mavuye
☐ Malory Allison
☐ Marc Repsold
☐ Marius Encebrecht

Contact

Full name: Joel Reeds

Telephone: 031 210 455

Email: joelreeds@email.com

Address

Existing New

Address Line 1: 12 Salby Court

Address Line 2: 7 Colinton Rd

Suburb: Gillits

City: Durban

Province/State: KZN

Post Code: 4000

Country: RSA

Case

Subject: The subject of the case

Information: Additional information relating to the case

Value: 0

Case Type: Type of Case

Source Type: The type of source

Related Customers

Next Activity

Salesman: Judith Mudzengi

Type: Type of activity

Subject: The subject of the activity

Comments: Additional information relating to the activity

Activity Attendees

Schedule

When: 11 Sep 2019 from 12:00 to 13:00

Reminder: Email ☐ SMS ☐ 30 minutes before scheduled start

Submit Options

Show customer after save ☒

Save

Related Customer Frame

You have the ability to link **Related Customers**. This enables you to invite contacts from various clients to an activity - such as a meeting or training session.

If you do not need to link a **Related Customer**, you can move on to the **Activity frame**.

Add Related Customer

1. Click on the drop-down arrow and select the relevant **customer** from the list.
2. Click on the [+] button to save this customer to this frame.

CRM BPO2 Test Environment
Judith Mudzengi

Create Cold Call

Customer

Customer

Riverside Investments

Rank Diamond (5 days)

Reg. No 789065

Type Construction

VAT No 908754637

Salesmen

☒ Abigail Milne
☐ Chris Haynes
☒ Judith Mudzengi

☐ Adele Weeder
☒ CO3 Admin
☐ Kashmira Nirghin

☐ Alex Spangenberg
☐ Colin Holden
☐ Kessia Maitland

☒ Almeria Teacy
☐ Dalene Pillay
☐ Kim Engelbrecht

☐ Andromache Joselevitch
☐ Darryl Muller
☐ Lucky Mavuye

☐ Angie Roseborough
☐ Debbie Luger
☐ Malory Allibon

☐ Armando Reichelt
☐ Derrick Weeder
☐ Marc Rapsold

☐ Arv Huellin
☐ Edvill Maskiva
☐ Marius Engelbrecht

Contact

Full name Joel Reeds

Telephone 031 210 455

Email joelreeds@email.com

Address

Existing New

Address Line 1 12 Selby Court

Address Line 2 7 Colinton Rd

Suburb Gillits

City Durban

Province/State KZN

Post Code 4000

Country RSA

Case

Subject Market New Products

Information Market New Products

Value 200000

Case Type New Customer

Source Type Referral

Related Customers

Related Customers

☒ Deleted Customers

No data to display

Next Activity

Salesman Judith Mudzengi

Type Type of activity

Subject The subject of the activity

Comments Additional information relating to the activity

Activity Attendees

Schedule

When 11 Sep 2019 from 12:00 to 13:00

Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

Submit Options

Show customer after save ☒

Save

Delete Related Customer

- Click on the **Delete** icon if you wish to remove a linked related customer.

CRM BPO2 Test Environment

Judith Mudzengi

Create Cold Call

Customer

Customer: Riverside Investments

Rank: Diamond (5 days)

Reg. No: 789065

Type: Construction

VAT No: 908754637

Salesmen

☒ Abigail Milne
☐ Adele Weeder
☐ Alex Spangenberg
☒ Almeria Teacy
☐ Andromache Joselevitch
☐ Angie Roseborough
☐ Armando Reichelt
☐ Ann-Marie

☐ Chris Haynes
☒ CO3 Admin
☐ Colin Holden
☐ Dalene Pillay
☐ Darryl Muller
☐ Debbie Luger
☐ Derrick Weeder
☐ Edward Mubvumba

☒ Judith Mudzengi
☐ Kashmira Ntshini
☐ Kessia Maitland
☐ Kim Engelbrecht
☐ Lucky Mavuye
☐ Malory Allibon
☐ Marc Repsold
☐ Mervyn Senebade

Contact

Full name: Joel Reeds

Telephone: 031 210 455

Email: joelreeds@email.com

Address

Existing New

Address Line 1: 12 Salby Court

Address Line 2: 7 Colinton Rd

Suburb: Gillits

City: Durban

Province/State: KZN

Post Code: 4000

Country: RSA

Case

Subject: Market New Products

Information: Market New Products

Value: 200000

Case Type: New Customer

Source Type: Referral

Related Customers

Related Customers: Hope Works: HOP0001

Hope Works: HOP0001

Next Activity

Salesman: Judith Mudzengi

Type: Type of activity

Subject: The subject of the activity

Comments: Additional information relating to the activity

Activity Attendees

Schedule

When: 11 Sep 2019 from 16:00 to 17:00

Reminder: Email ☐ SMS ☐ 30 minutes before scheduled start

Submit Options

Show customer after save: ☒

Save

Next Activity Frame

- **Salesman:** The person currently logged on to the system will be selected by default. You can assign this Customer, Case and Activity to another salesman, if you are raising this cold call on their behalf.
 - To assign this case to another salesman, click on the **drop-down arrow** and select the relevant salesman.
 - **Note:** You will only be able to assign the case to one of the salesmen you selected in the **Salesmen frame**.
- **Type:** Select the type of Activity, e.g. 'Call'
- **Subject:** Type in the subject of the activity.

- **Comments:** This text box give you the opportunity to type in any additional information relating to the activity.

CRM BPO2 Test Environment Judith Mudzengi

Create Cold Call

Customer

Customer Riverside Investments

Rank Diamond (5 days)

Reg. No 789065

Type Construction

VAT No 908754637

Salesmen

☒ Abigail Milne
☐ Adele Weeder
☐ Alex Spangenberg
☒ Almeria Teacy
☐ Andromache Joselevitch
☐ Angie Roseborough
☐ Armando Reichelt
☐ Arv Huelin

☐ Chris Haynes
☒ CO3 Admin
☐ Colin Holden
☐ Dalene Pillay
☐ Darryl Muller
☐ Debbie Luger
☐ Derrick Weeder
☐ Edwell Msakva

☒ Judith Mudzengi
☐ Kashmira Ninghin
☐ Kessia Maitland
☐ Kim Engelbrecht
☐ Lucky Mavuye
☐ Malory Allibon
☐ Marc Repsold
☐ Marius Engelbrecht

Contact

Full name Joel Reeds

Telephone 031 210 455

Email joelreeds@email.com

Address

Existing New

Address Line 1 12 Selby Court

Address Line 2 7 Collinton Rd

Suburb Gillits

City Durban

Province/State KZN

Post Code 4000

Country RSA

Case

Subject Market New Products

Information Market New Products

Value 200000

Case Type New Customer

Source Type Referral

Related Customers

Related Customers

Hope Works: HOP0001

Hope Works - HOP0001

Next Activity

Salesman Judith Mudzengi

Type Type of activity

Subject The subject of the activity

Comments Additional information relating to the activity

Activity Attendees

Schedule

When 12 Sep 2019 from 11:00 to 12:00

Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

Submit Options

Show customer after save ☒

Save

Activity Attendees Frame

It is only necessary to link Activity Attendees if you want to send email invites to these people to join an activity - such as a meeting. The attendees can accept or reject this request. If they accept, this activity will display as an event on their calendar.

1. The Salesman and Customer Contact will be linked as Activity Attendees by default (and cannot be removed).

- BPO2 Test Environment

Judith Mudzengi

Create Cold Call

Customer	* Customer: Riverside Investments * Rank: Diamond (5 days) Reg. No: 789065 * Type: Construction VAT No: 908754637	
Salesmen	☒ Abigail Milne ☐ Adelle Weeder ☐ Alex Spangenberg ☒ Almeria Teacy ☐ Andromache Josephewitch ☐ Angie Roseborough ☐ Armando Reichelt ☐ Arv Huelin ☐ Chris Haynes ☒ CQ3 Admin ☐ Colin Holden ☐ Dalene Pillay ☐ Darryl Muller ☐ Debbie Luger ☐ Derrick Weeder ☐ Edweli Maakiva ☒ Judith Mudzengi ☐ Kashmira Ntshini ☐ Kessia Maitland ☐ Kim Engelbrecht ☐ Lucky Maroye ☐ Malory Allibon ☐ Marc Rapsold ☐ Marius Enselbrecht	
Contact	* Full name: Joel Reeds * Telephone: 031 210 455 Email: joelreeds@gmail.com	
Address	Existing ☐ New ☒ Address Line 1: 12 Selby Court Address Line 2: 7 Colinton Rd Suburb: Gillits City: Durban Province/State: KZN Post Code: 4000 Country: RSA	
Case	* Subject: Market New Products Information: Market New Products * Value: 200000 Case Type: New Customer Source Type: Referral	
Related Customers	Related Customers Hope Works: HOP0001 Hope Works: HOP0001	
Next Activity	* Salesman: Judith Mudzengi * Type: Phone call * Subject: Market New Products Comments: Market New Products	
Activity Attendees	Attendees ☒ ☒ Send Email Invites ☐ * Note that invitations can only be sent to attendees with valid email addresses Case contact and salesman are always made attendees	
Schedule	When: 12 Sep 2019 from 11:00 to 12:00 Reminder: Email ☐ SMS ☐ 30 minutes before scheduled start	
Submit Options	Show customer after save ☒	

Save

5. Click on the **Delete** icon if you wish to remove an attendee.

CRM BPO2 Test Environment

Judith Mudzengi

Create Cold Call

Customer

Customer: Riverside Investments

Rank: Diamond (5 days)

Reg. No: 789055

Type: Construction

VAT No: 908753637

Salesmen

☒ Abigail Milne
☐ Adele Weeder
☐ Alex Spangenberg
☒ Almeria Teacy
☐ Andromache Josalevitch
☐ Angie Roseborough
☐ Armando Reichelt
☐ Arv Huelin

☐ Chris Haynes
☒ CO3 Admin
☐ Colin Holden
☐ Dalene Pillay
☐ Darryl Muller
☐ Debbie Lugar
☐ Derrick Weeder
☐ Edvill Maskiva

☒ Judith Mudzengi
☐ Kashmira Ntshini
☐ Kessia Marland
☐ Kim Engelbrecht
☐ Lucky Mawaya
☐ Malory Allibon
☐ Marc Rapsold
☐ Marius Enelbrecht

Contact

Full name: Joel Reeds

Telephone: 031 210 455

Email: joelreeds@gmail.com

Address

Existing New

Address Line 1: 12 Selby Court

Address Line 2: 7 Colinton Rd

Suburb: Gillits

City: Durban

Province/State: KZN

Post Code: 4000

Country: RSA

Case

Subject: Market New Products

Information: Market New Products

Value: 200000

Case Type: New Customer

Source Type: Referral

Related Customers

Related Customers

Hope Works: HOP0001

Hope Works: HOP0001

Next Activity

Salesman: Judith Mudzengi

Type: Phone call

Subject: Market New Products

Comments: Market New Products

Activity Attendees

Attendees

John Smith: Hope Works

John Smith

Page 1 of 1 (1 items)

Send Email Invites

*note that invitations can only be sent to attendees with valid email addresses

Schedule

When: 12 Sep 2019

from: 13:00 to 14:00

Reminder: Email SMS 30 minutes before scheduled start

Submit Options

Show customer after save

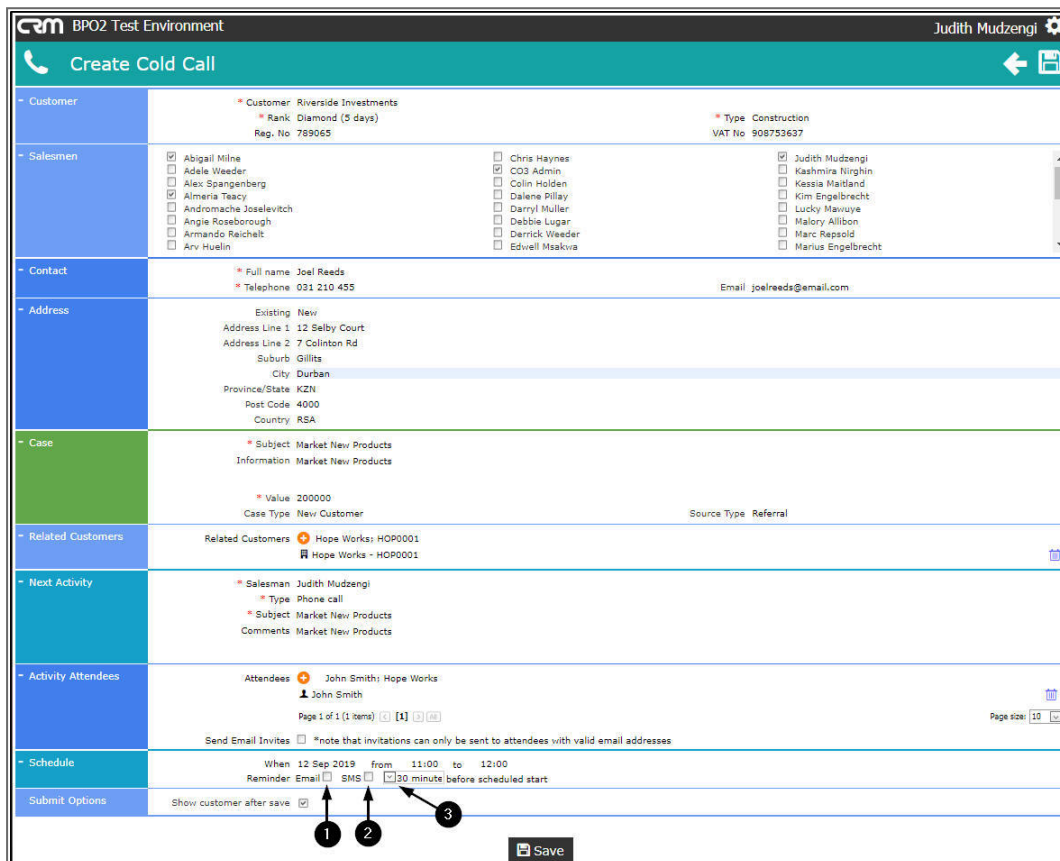
Save

Schedule Section

- **When:** This field will be auto populated. Click on the **drop-down arrow** and select the relevant date.
- **From:** This field will be auto populated. Use the **up and down arrows** to select the relevant time.
- **To:** This field will be auto populated. Use the **up and down arrows** to select the relevant time.
- **Reminder:** If you wish to send a reminder to your attendees, you can choose whether to send the reminder by **Email** or **SMS**.
 1. Tick the **Email** check box if you wish to send the reminder by email.
 2. Tick the **SMS** check box if you wish to send the reminder by SMS.

3. ' **Reminder Time** ': You can also choose when to send the reminder by clicking on the **drop-down arrow** and selecting the appropriate time period.

- **Note:** Reminders will only work if your mobile number and email address have been configured in **BPO**.



CRM BPO2 Test Environment Judith Mudzengi

Create Cold Call

Customer
 * Customer: Riverside Investments
 * Rank: Diamond (5 days)
 Reg. No: 789065
 * Type: Construction
 VAT No: 908753637

Salesmen
☒ Abigail Milne
☐ Adele Weeder
☐ Alex Spangenberg
☐ Almeria Tracy
☐ Andromache Josselovitch
☐ Angie Roseborough
☐ Armando Reichelt
☐ Any Huelin
☐ Chris Haynes
☒ CO3 Admin
☐ Colin Holden
☐ Dalene Pillay
☐ Darryl Muller
☐ Debbie Luger
☐ Derrick Weeder
☐ Edwile Msakva
☒ Judith Mudzengi
☐ Kashmira Nirghin
☐ Kessia Maitland
☐ Kim Engelbrecht
☐ Lucky Mawuye
☐ Malory Allibon
☐ Marc Rapsold
☐ Marius Engelbrecht

Contact
 * Full name: Joel Reeds
 * Telephone: 031 210 455
 Email: joelreeds@gmail.com

Address
 Existing New
 Address Line 1: 12 Selby Court
 Address Line 2: 7 Colinton Rd
 Suburb: Gillits
 City: Durban
 Province/State: KZN
 Post Code: 4000
 Country: RSA

Case
 * Subject: Market New Products
 Information: Market New Products
 * Value: 200000
 Case Type: New Customer
 Source Type: Referral

Related Customers
 Related Customers: Hope Works: HOP0001
 Hope Works: HOP0001

Next Activity
 * Salesman: Judith Mudzengi
 * Type: Phone call
 * Subject: Market New Products
 Comments: Market New Products

Activity Attendees
 Attendees: John Smith: Hope Works
 John Smith
 Page 1 of 1 (1 items) [1] [2] [3]
 Send Email Invites ☐ *note that invitations can only be sent to attendees with valid email addresses

Schedule
 When: 12 Sep 2019 from 11:00 to 12:00
 Reminder: Email ☐ SMS ☐ 30 minute before scheduled start

Submit Options
 Show customer after save: ☒ 1
 2
 3
 Save

Submit Options Section

- **Show customer after save:** This will be selected by default. Unselect if you do not wish to see the customer after saving.

CRM BPO2 Test Environment
Judith Mudzengi

Create Cold Call

Customer

Customer: Riverside Investments
Rank: Diamond (5 days)
Reg. No: 789065
Type: Construction
VAT No: 908753637

Salesmen

☒ Abigail Milne
☐ Adele Weeder
☐ Alex Spangenberg
☒ Almeria Teacy
☐ Andromache Joselevitch
☐ Angie Roseborough
☐ Armando Reichelt
☐ Arv Huelin
☐ Chris Haynes
☒ CO3 Admin
☐ Colin Holden
☐ Dalene Pillay
☐ Darryl Muller
☐ Debbie Luger
☐ Derrick Weeder
☐ Edvell Msaikwa
☒ Judith Mudzengi
☐ Kashmira Ninghin
☐ Kessia Maitland
☐ Kim Engelbrecht
☐ Lucky Maruyve
☐ Malory Allibon
☐ Marc Repsold
☐ Marius Engebrecht

Contact

Full name: Joel Reeds
Telephone: 031 210 455
Email: joelreeds@email.com

Address

Existing: ☐ New: ☒
Address Line 1: 12 Selby Court
Address Line 2: 7 Collinton Rd
Suburb: Gillits
City: Durban
Province/State: KZN
Post Code: 4000
Country: RSA

Case

Subject: Market New Products
Information: Market New Products
Value: 200000
Case Type: New Customer
Source Type: Referral

Related Customers

Related Customers: ☒ Hope Works: HOP0001
☐ Hope Works: HOP0001

Next Activity

Salesman: Judith Mudzengi
Type: ☒ Phone call
Subject: Market New Products
Comments: Market New Products

Activity Attendees

Attendees: ☒ John Smith: Hope Works
☒ John Smith
Page 1 of 1 (1 item) [1] [2] [3]
Send Email Invites: ☐ *note that invitations can only be sent to attendees with valid email addresses

Schedule

When: 13 Sep 2019 from 11:00 to 12:00
Reminder: Email ☒ SMS ☐ 30 minutes before scheduled start

Submit Options

Show customer after save: ☒

Save

SAVE

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

CRM BPO2 Test Environment

Judith Mudzengi

Create Cold Call

Customer

Customer: Riverside Investments

Rank: ☐ Diamond (5 days)

Reg. No: 789065

Type: Construction

VAT No: 908753637

Salesmen

☒ Abigail Milne
☐ Adele Weeder
☐ Alex Spangenberg
☒ Almeria Teacy
☐ Andromache Joselevitch
☐ Angie Roseborough
☐ Armando Reichelt
☐ Arv Huelin

☐ Chris Haynes
☒ CO3 Admin
☐ Colin Holden
☐ Dalene Pillay
☐ Derryl Muller
☐ Debbie Lugar
☐ Derrick Weeder
☐ Edvell Msaikwa

☒ Judith Mudzengi
☐ Kashmira Ninghin
☐ Kessia Maitland
☐ Kim Engelbrecht
☐ Lucky Maruyee
☐ Malory Allibon
☐ Marc Repsold
☐ Marius Engelbrecht

Contact

Full name: Joel Reads

Telephone: 031 210 455

Email: joelreads@email.com

Address

Existing ☐ New ☐

Address Line 1: 12 Selby Court

Address Line 2: 7 Collinton Rd

Suburb: Gillits

City: Durban

Province/State: KZN

Post Code: 4000

Country: RSA

Case

Subject: Market New Products

Information: Market New Products

Value: 200000

Case Type: New Customer

Source Type: Referral

Related Customers

Related Customers

☒ Hope Works: HOP0001
☐ Hope Works: HOP0001

Next Activity

Salesman: Judith Mudzengi

Type: Phone call

Subject: Market New Products

Comments: Market New Products

Activity Attendees

Attendees

☒ John Smith: Hope Works
☐ John Smith

Page 1 of 1 (1 item) [1] [2] [3]

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

Schedule

When: 13 Sep 2019 from 11:00 to 12:00

Reminder: Email ☒ SMS ☐ 30 minutes before scheduled start

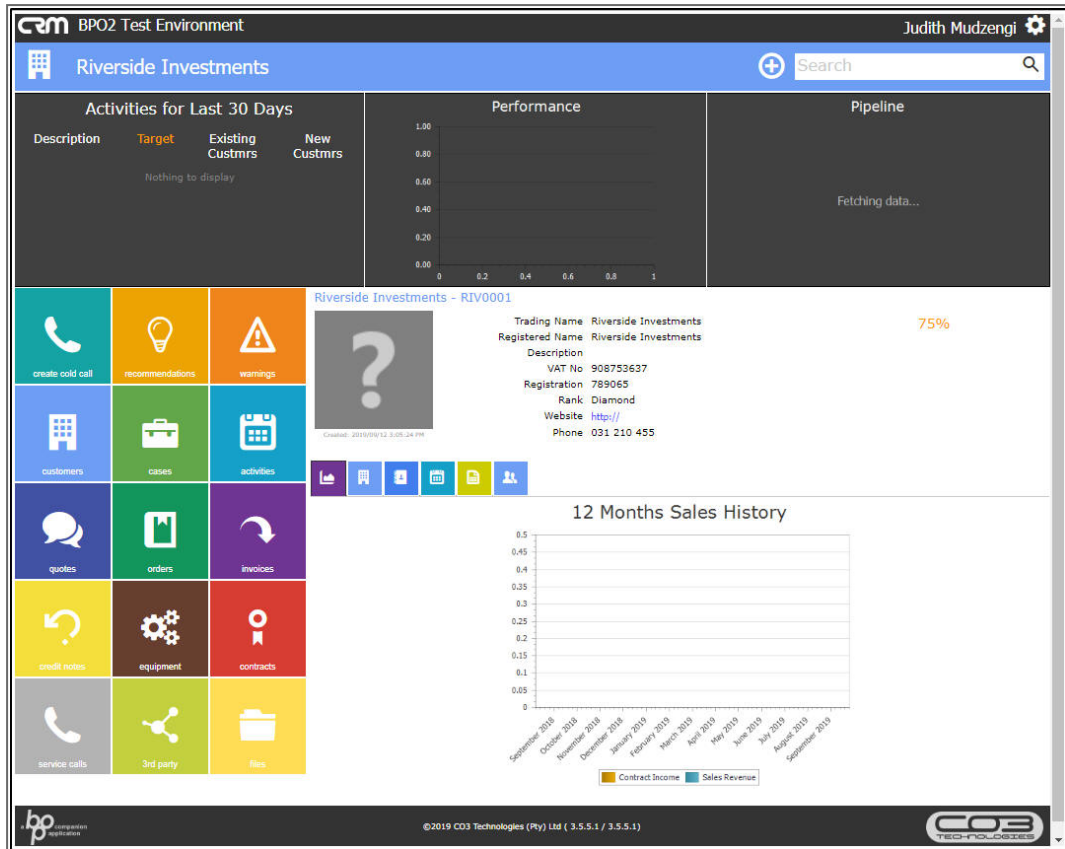
Submit Options

Show customer after save ☒

1

Save

- The **Customer Dashboard** will be displayed.
- The newly added customer can be viewed in this screen.



CREATE COLD CALL FOR EXISTING CUSTOMER

Customer Section

- **Customer:**
 1. For an existing customer, either click on the **drop-down arrow** and select the relevant customer or

CRM BPO2 Test Environment
Judith Mudzengi

Create Cold Call

Customer

Customer

Rank

Reg. No

Type

VAT No

Salesmen

Contact

Full name

Telephone

Email

Address

Case

Subject

Information

Value

Case Type

Source Type

Related Customers

Next Activity

Salesman

Type

Subject

Comments

Activity Attendees

Schedule

When

from

to

Reminder

Email

SMS

30 minutes before scheduled start

Submit Options

Show customer after save

Save

- Customer:**
 1. type in the Customer Name,
 2. a customers list will pop up. As you type,the amount of customers in the list this will reduce. Select the relevant customer.

CRM BPO2 Test Environment Judith Mudzengi

Create Cold Call

1

2

Customer

* Customer: Hop
 * Rank: 71505978
 * Reg. No: 71506696

Salesmen

Contact

* Full name: 71505688
 * Telephone: 71502461
 71509711

Address

Case

* Subject: The subject of the case
 Information: Additional information relating to the case
 * Value: 0
 Case Type: Type of Case
 Source Type: The type of source

Related Customers

Next Activity

* Salesman: Judith Mudzengi
 * Type: Type of activity
 * Subject: The subject of the activity
 Comments: Additional information relating to the activity

Activity Attendees

Schedule

When: 12 Sep 2019 from 18:00 to 19:00
 Reminder: Email ☐ SMS ☐ 30 minutes before scheduled start

Submit Options

Show customer after save ☒

Save

- **Rank:** This field will auto populated and cannot be edited.
- **Reg No:** This field will auto populated and cannot be edited.
- **Type:** This field will auto populated and cannot be edited.
- **VAT No:** This field will auto populated and cannot be edited.

CRM BPO2 Test Environment Judith Mudzengi

Create Cold Call

Customer

* Customer: Hope Works
 * Rank: Silver (60 days)
 * Reg. No: Registration number
 * Type: Retail
 VAT No: VAT number

Salesmen

Contact

* Full name: Contact's full name
 * Telephone: Contact's telephone number
 Email: Email address

Address

Case

* Subject: The subject of the case
 Information: Additional information relating to the case
 * Value: 0
 Case Type: Type of Case
 Source Type: The type of source

Related Customers

Next Activity

* Salesman: Judith Mudzengi
 * Type: Type of activity
 * Subject: The subject of the activity
 Comments: Additional information relating to the activity

Activity Attendees

Schedule

When: 13 Sep 2019 from 11:00 to 12:00
 Reminder: Email ☐ SMS ☐ 30 minutes before scheduled start

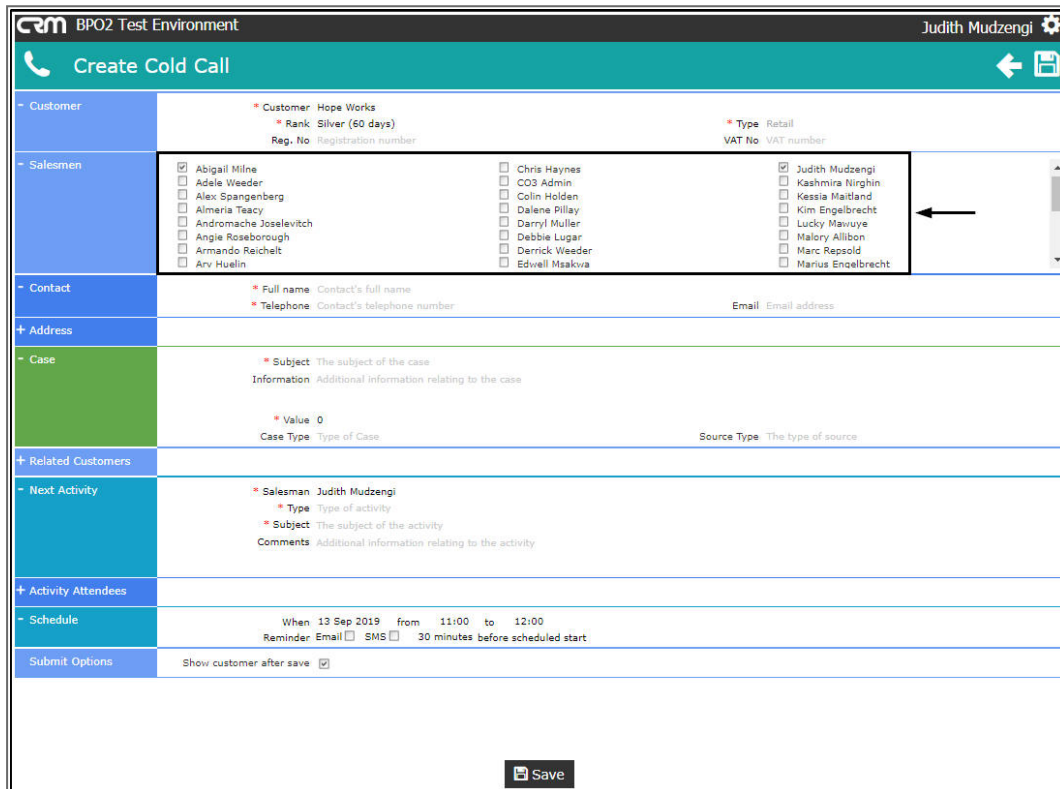
Submit Options

Show customer after save ☒

Save

Sales Section

- Previously selected salesmen will already be marked. You can unselect a salesman if applicable.
- Mark additional salesmen that will be linked to this customer if required. These marked salesmen will be available for selection if you are raising this cold call to assign to another salesman.



CRM BPO2 Test Environment Judith Mudzengi

Create Cold Call

Customer

* Customer: Hope Works
 * Rank: Silver (50 days)
 * Type: Retail
 Reg. No. Registration number VAT No. VAT number

Salesmen

☒ Abigail Milne	☐ Chris Haynes	☒ Judith Mudzengi
☐ Adele Weeder	☐ CO3 Admin	☐ Kashmira Nigthin
☐ Alex Spangenberg	☐ Colin Holden	☐ Kessia Maitland
☐ Almeria Teacy	☐ Dalene Pillay	☐ Kim Engelbrecht
☐ Andromache Joselevitch	☐ Darryl Muller	☐ Lucky Maruyue
☐ Angie Roseborough	☐ Debbie Luger	☐ Malory Allibon
☐ Armando Reichelt	☐ Derrick Weeder	☐ Marc Repsold
☐ Arv Huellin	☐ Edvill Msakva	☐ Marius Engelbrecht

Contact

* Full name: Contact's full name
 * Telephone: Contact's telephone number
 Email: Email address

Address

Case

* Subject: The subject of the case
 Information: Additional information relating to the case
 * Value: 0
 Case Type: Type of Case
 Source Type: The type of source

Related Customers

Next Activity

* Salesman: Judith Mudzengi
 * Type: Type of activity
 * Subject: The subject of the activity
 Comments: Additional information relating to the activity

Activity Attendees

Schedule

When: 13 Sep 2019 from 11:00 to 12:00
 Reminder: Email ☐ SMS ☐ 30 minutes before scheduled start

Submit Options

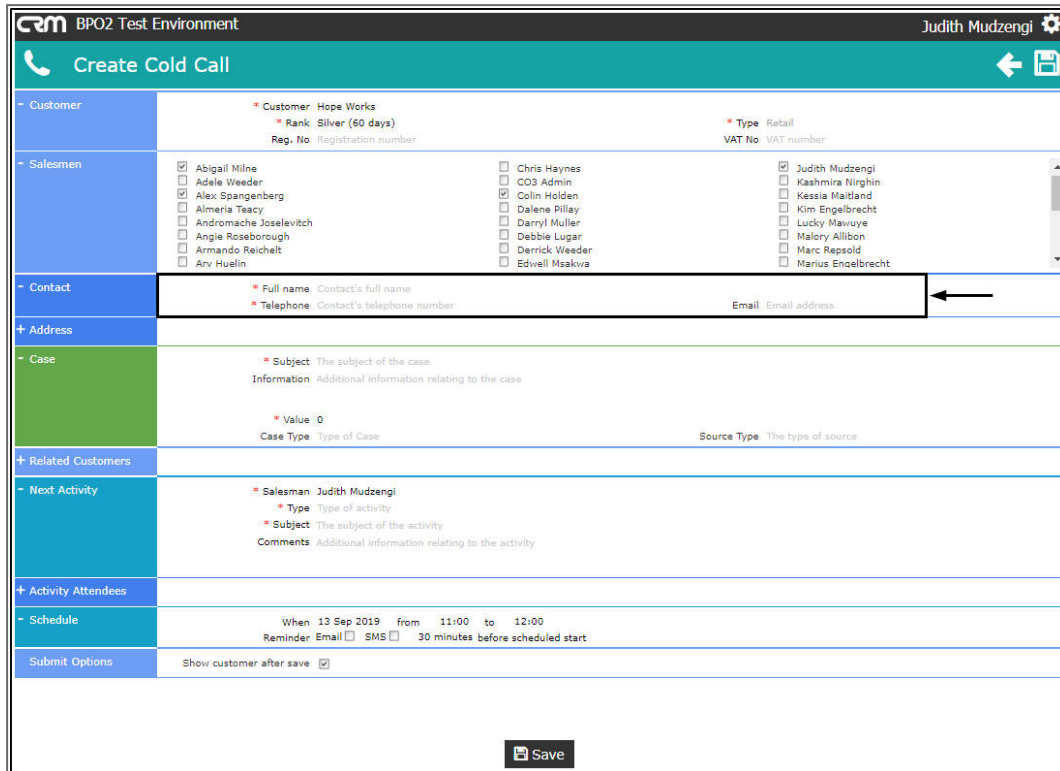
Show customer after save: ☒

Save

Contact Section

- **Full Name:** Click on the **drop-down arrow** and select the customer contact.
- **Telephone:** This field will auto populate when the customer contact is selected but can be edited if required.

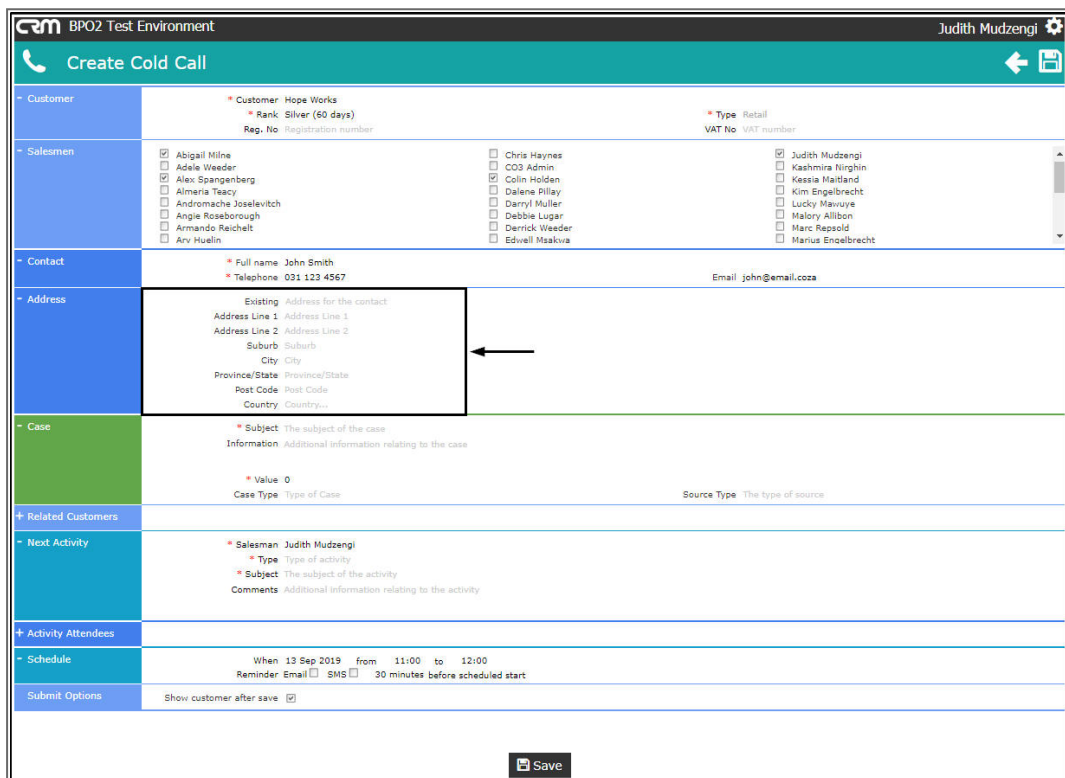
- **Email Address:** This field will auto populate when the customer contact is selected can be edited if required.



Address Section

- You can either select an existing customer address or add a **new** customer address.
- For the purpose of this manual, an existing customer address will be used.
 - **Existing:** Click on the **drop-down arrow** and select an existing customer address.
 - **Address Line 1 and 2:** These fields will auto populate but can be edited if applicable.
 - **Suburb:** This field will auto populate but can be edited if applicable.

- **City:** This field will auto populate but can be edited if applicable.
- **Province / State:** This field will auto populate but can be edited if applicable.
- **Post Code:** This field will auto populate but can be edited if applicable.
- **Country:** This field will auto populate but can be edited if applicable.



Create Cold Call

Customer

* Customer: Hope Works
 * Rank: Silver (60 days)
 * Type: Retail
 Reg. No: Registration number
 VAT No: VAT number

Salesmen

☒ Abigail Milne
☐ Adele Weeder
☒ Alex Spangenberg
☐ Almeria Teacy
☐ Andromache Josselovitch
☐ Angie Roseborough
☐ Armando Reichelt
☐ Arv Huelin

☐ Chris Haynes
☐ CO3 Admin
☒ Colin Holden
☐ Dalene Pillay
☐ Darryl Muller
☐ Debbie Luger
☐ Derrick Weeder
☐ Edwell Makiwa

☒ Judith Mudzengi
☐ Kashmira Nirghin
☐ Kessia Maitland
☐ Kim Engelbrecht
☐ Lucky Manoye
☐ Malory Allibon
☐ Marc Repsold
☐ Marius Engelbrecht

Contact

* Full name: John Smith
 * Telephone: 031 123 4567
 Email: john@email.coza

Address

Existing address for the contact:
 Address Line 1: Address Line 1
 Address Line 2: Address Line 2
 Suburb: Suburb
 City: City
 Province/State: Province/State
 Post Code: Post Code
 Country: Country...

Case

* Subject: The subject of the case
 Information: Additional information relating to the case
 * Value: 0
 Case Type: Type of Case
 Source Type: The type of source

Related Customers

Next Activity

* Salesman: Judith Mudzengi
 * Type: Type of activity
 * Subject: The subject of the activity
 Comments: Additional information relating to the activity

Activity Attendees

Schedule

When: 13 Sep 2019 from 11:00 to 12:00
 Reminder: Email ☐ SMS ☐ 30 minutes before scheduled start

Submit Options

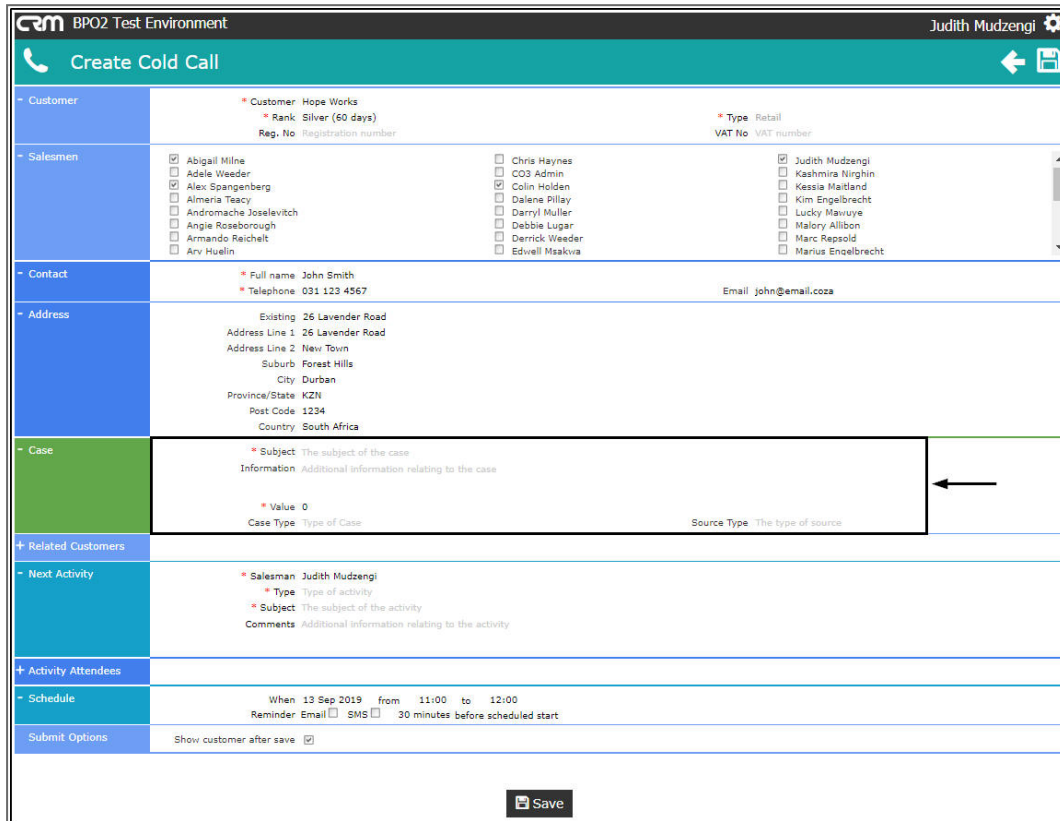
Show customer after save: ☒

Save

Case Section

- **Subject:** Type in the subject of the case.
- **Information:** Type in additional information relating to the case if applicable.
- **Value:** Type in the estimated value of the case.

- **Case Type:** Click on the **drop-down arrow** and select the relevant case type.
- **Source Type:** Click on the **drop-down arrow** and select the relevant source type.



CRM BPO2 Test Environment Judith Mudzengi

Create Cold Call

Customer
 * Customer: Hope Works
 * Rank: Silver (60 days)
 Reg. No: Registration number
 * Type: Retail
 VAT No: VAT number

Salesmen
☐ Abigail Milne ☐ Chris Haynes ☐ Judith Mudzengi
☐ Adele Weeder ☐ CO3 Admin ☐ Kashmira Nigihin
☐ Alex Spangenberg ☐ Colin Holden ☐ Kessia Matland
☐ Almeria Teacy ☐ Dalene Pillay ☐ Kim Engelbrecht
☐ Andromache Joselevitch ☐ Darryl Muller ☐ Lucky Mavuye
☐ Angie Roseborough ☐ Debbie Luger ☐ Malory Allibon
☐ Armando Reichelt ☐ Derrick Weeder ☐ Marc Repsold
☐ Arv Huellin ☐ Edwile Maskiva ☐ Marius Engelbrecht

Contact
 * Full name: John Smith
 * Telephone: 031 123 4567
 Email: john@email.co.za

Address
 Existing: 26 Lavender Road
 Address Line 1: 26 Lavender Road
 Address Line 2: New Town
 Suburb: Forest Hills
 City: Durban
 Province/State: KZN
 Post Code: 1234
 Country: South Africa

Case
 * Subject: The subject of the case
 Information: Additional information relating to the case
 * Value: 0
 Case Type: Type of Case
 Source Type: The type of source

Related Customers

Next Activity
 * Salesman: Judith Mudzengi
 * Type: Type of activity
 * Subject: The subject of the activity
 Comments: Additional information relating to the activity

Activity Attendees

Schedule
 When: 13 Sep 2019 from 11:00 to 12:00
 Reminder: Email ☐ SMS ☐ 30 minutes before scheduled start

Submit Options
 Show customer after save: ☒

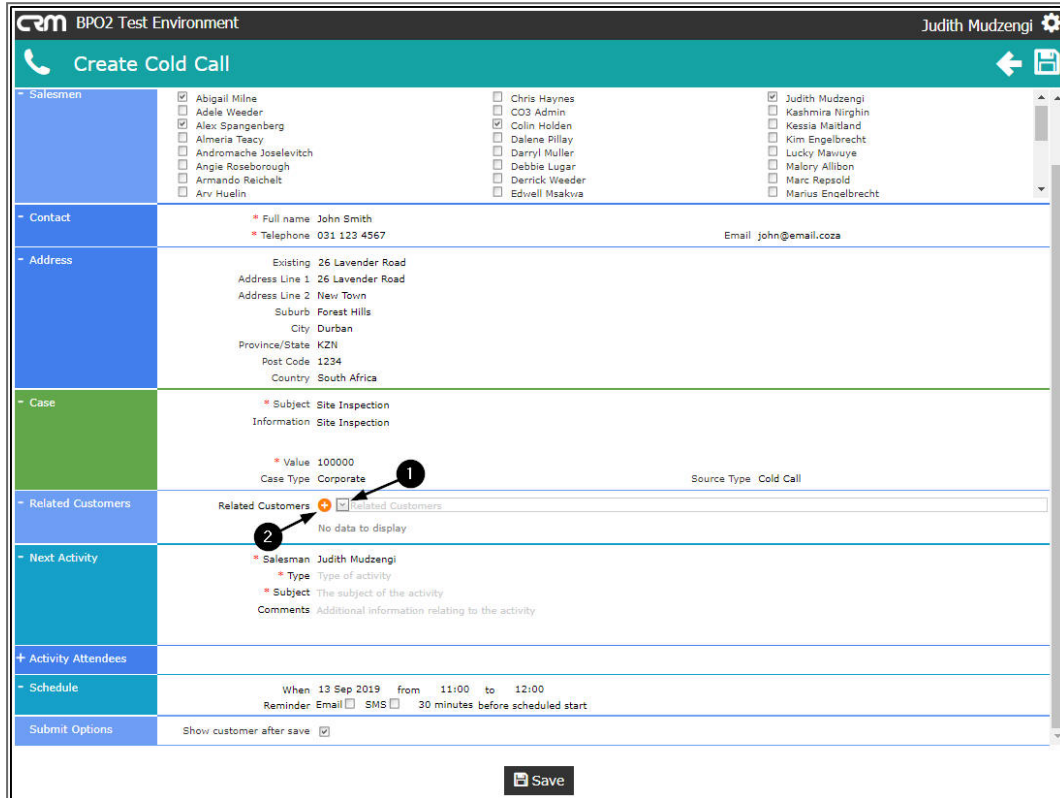
Save

Related Customer Section

- You have the ability to link **Related Customers**. This enables you to invite contacts from various clients to an activity - such as a meeting or training session.
- If you don't need to link a **Related Customer**, you can move on to the **Activity section**.

- **Related Customers:**

1. Click on the **drop-down arrow** and select the relevant customer from the list and
2. click on the ' + ' button.



CRM BPO2 Test Environment Judith Mudzengi

Create Cold Call

Salesmen

☒ Abigail Milne	☐ Chris Haynes	☒ Judith Mudzengi
☐ Adele Weeder	☐ CO3 Admin	☐ Kashmira Nigbin
☐ Alex Spangenberg	☐ Colin Holden	☐ Kessia Maitland
☐ Almeria Tracy	☐ Dalene Pillay	☐ Kim Engelbrecht
☐ Andromache Joselevitch	☐ Darryl Muller	☐ Lucky Mavuye
☐ Angie Roseborough	☐ Debbie Luger	☐ Malory Allibon
☐ Armando Reichelt	☐ Derrick Weeder	☐ Marc Repsold
☐ Anv Huelin	☐ Edvill Maskva	☐ Marius Engelbrecht

Contact

* Full name: John Smith
 * Telephone: 031 123 4567
 Email: john@email.co.za

Address

Existing: 26 Lavender Road
 Address Line 1: 26 Lavender Road
 Address Line 2: New Town
 Suburb: Forest Hills
 City: Durban
 Province/State: KZN
 Post Code: 1234
 Country: South Africa

Case

* Subject: Site Inspection
 Information: Site Inspection
 * Value: 100000
 Case Type: Corporate
 Source Type: Cold Call

Related Customers

Related Customers: + ▼ Related Customers
 No data to display

Next Activity

* Salesman: Judith Mudzengi
 * Type: Type of activity
 * Subject: The subject of the activity
 Comments: Additional information relating to the activity

Activity Attendees

Schedule

When: 13 Sep 2019 from 11:00 to 12:00
 Reminder: Email ☐ SMS ☐ 30 minutes before scheduled start

Submit Options

Show customer after save: ☒

Save

- **Related Customers:**

3. Click on the **Delete** icon if you wish to remove a linked related customer.

CRM BPO2 Test Environment
Judith Mudzengi

Create Cold Call

Customer

Customer Hope Works
Rank Silver (60 days)
Reg. No. Registration number
Type Retail
VAT No. VAT number

Salesmen

☒ Abigail Milne
☐ Chris Haynes
☒ Judith Mudzengi
☐ Kashmira Nigihin
☐ Alex Spangenberg
☐ CO3 Admin
☐ Kessia Maitland
☐ Almeria Teacy
☐ Dalene Pillay
☐ Kim Engelbrecht
☐ Andromache Joselevitch
☐ Darryl Muller
☐ Lucky Mawuye
☐ Angie Roseborough
☐ Debbie Luger
☐ Malory Allibon
☐ Armando Reichelt
☐ Derrick Weeder
☐ Marc Reggold
☐ Anv Huelin
☐ Edwell Msakiva
☐ Marius Engelbrecht

Contact

Full name John Smith
Telephone 031 123 4567
Email john@email.coza

Address

Existing 26 Lavender Road
Address Line 1 26 Lavender Road
Address Line 2 New Town
Suburb Forest Hills
City Durban
Province/State KZN
Post Code 1234
Country South Africa

Case

Subject Site Inspection
Information Site Inspection
Value 100000
Case Type Corporate Customer
Source Type Cold Call

Related Customers

Related Customers
JIRA Networked - 71505555
JIRA Networked - 71505555

Next Activity

Salesman Judith Mudzengi
Type Type of activity
Subject The subject of the activity
Comments Additional information relating to the activity

Activity Attendees

Schedule

When 13 Sep 2019 from 11:00 to 12:00
Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

Submit Options

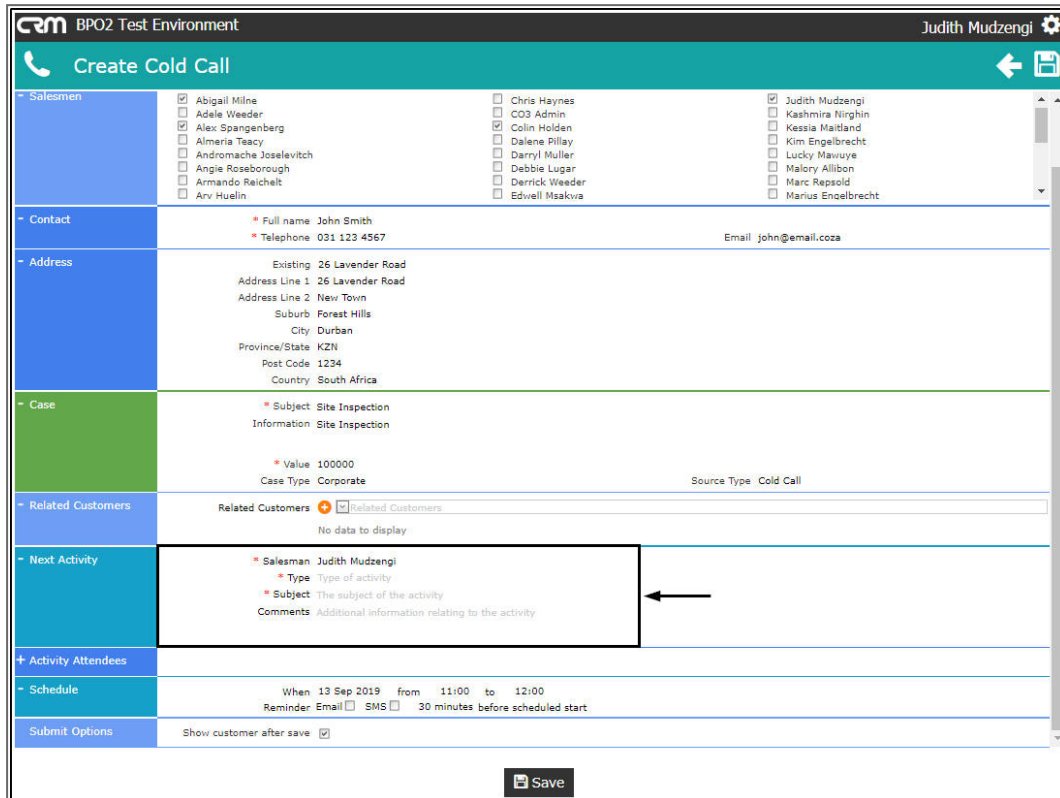
Show customer after save ☒

Save

Next Activity Section

- Salesmen:** You will be selected by default. You can assign this Customer, Case and Activity to another salesman, if you are raising this on their behalf.
 - To assign this case to another salesman, click on the **drop-down arrow** and select the relevant salesman.
 - Note:** You can only assign the case to the salesmen selected in the **Salesmen section**.
- Type:** Select the type of Activity, e.g. 'Call'.
- Subject:** Type in the subject of the activity.

- **Comments:** Type in additional information relating to the activity.



CRM BPO2 Test Environment Judith Mudzengi

Create Cold Call

Salesmen

☒ Abigail Milne	☐ Chris Haynes	☒ Judith Mudzengi
☐ Adele Weeder	☐ CO3 Admin	☐ Kashmira Nirpin
☒ Alex Spangenberg	☒ Colin Holden	☐ Kessia Maitland
☐ Almeria Teacy	☐ Dalene Pillay	☐ Kim Engelbrecht
☐ Andromache Joselevitch	☐ Darryl Muller	☐ Lucky Mavuye
☐ Angie Roseborough	☐ Debbie Luger	☐ Malory Allibon
☐ Armando Reichelt	☐ Derrick Weeder	☐ Marc Rappold
☐ Anu Huelin	☐ Edvill Mskiva	☐ Marius Engelbrecht

Contact

* Full name John Smith
 * Telephone 031 123 4567
 Email john@email.co.za

Address

Existing 26 Lavender Road
 Address Line 1 26 Lavender Road
 Address Line 2 New Town
 Suburb Forest Hills
 City Durban
 Province/State KZN
 Post Code 1234
 Country South Africa

Case

* Subject Site Inspection
 Information Site Inspection
 * Value 100000
 Case Type Corporate
 Source Type Cold Call

Related Customers

Related Customers Related Customers
 No data to display

Next Activity

* Salesman Judith Mudzengi
 * Type Type of activity
 * Subject The subject of the activity
 Comments Additional information relating to the activity

Activity Attendees

Schedule

When 13 Sep 2019 from 11:00 to 12:00
 Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

Submit Options

Show customer after save ☒

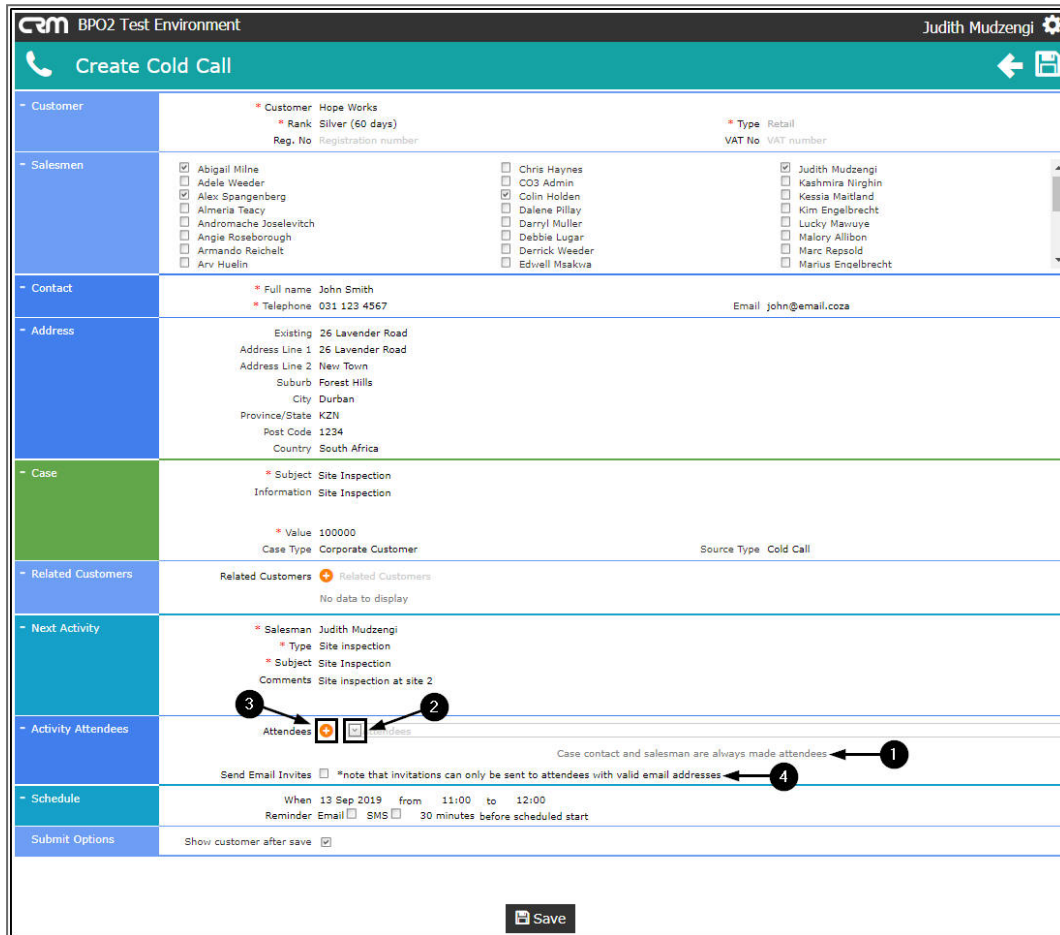
Save

Activity Attendees Section

- It is only necessary to link Activity Attendees if you want to send email invites to these people to join an activity - such as a meeting. The attendees can accept or reject this request. If they accept, this activity will display as an event on their calendar.
 1. The Salesman and Customer Contact will be linked as Activity Attendees by default (and cannot be removed).
 2. You can also link other employees, case customer contacts and related customer contacts. To do so, click on the **drop-down arrow** and select the relevant person from the list.
 3. Then click on the ' + ' button.

4. Tick the **Send Email Invites** check box if you wish to send email invites to the attendees.

- **Note:** The **Send Email Invites** option may be selected by default depending on the BPOCRM configuration .



CRM BPO2 Test Environment Judith Mudzengi

Create Cold Call

Customer

* Customer Hope Works
 * Rank Silver (60 days)
 Reg. No Registration number
 * Type Retail
 VAT No VAT number

Salesmen

☒ Abigail Milne
☐ Adele Weeder
☒ Alex Spangenberg
☐ Almeria Teacy
☐ Andromache Joselevitch
☐ Angie Roseborough
☐ Armando Reichalt
☐ Arv Huelin
☐ Chris Haynes
☐ CO3 Admin
☒ Colin Holden
☐ Dalene Pillay
☐ Darryl Muller
☐ Debbie Lugar
☐ Derrick Weeder
☐ Edwell Msakva
☒ Judith Mudzengi
☐ Kashmira Ntshini
☐ Kessia Maitland
☐ Kim Engelbrecht
☐ Lucky Mavuye
☐ Malory Allibon
☐ Marc Repsold
☐ Marius Engelbrecht

Contact

* Full name John Smith
 * Telephone 031 123 4567
 Email john@email.coza

Address

Existing 26 Lavender Road
 Address Line 1 26 Lavender Road
 Address Line 2 New Town
 Suburb Forest Hills
 City Durban
 Province/State KZN
 Post Code 1234
 Country South Africa

Case

* Subject Site Inspection
 Information Site Inspection
 * Value 100000
 Case Type Corporate Customer
 Source Type Cold Call

Related Customers

Related Customers + Related Customers
 No data to display

Next Activity

* Salesman Judith Mudzengi
 * Type Site Inspection
 * Subject Site Inspection
 Comments Site inspection at site 2

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

When 13 Sep 2019 from 11:00 to 12:00
 Reminder Email ☐ SMS ☐ 30 minutes before scheduled start

Submit Options

Show customer after save ☒

Save

5. Click on the **Delete** icon if you wish to remove an attendee.

CRM BPO2 Test Environment
Judith Mudzengi

Create Cold Call

Customer

Customer: Hope Works

Rank: Silver (60 days)

Reg. No. Registration number

Type: Retail

VAT No. VAT number

Salesmen

☒ Abigail Milne
☐ Chris Haynes
☒ Judith Mudzengi

☐ Adele Weeder
☐ CO3 Admin
☐ Kashmira Nirghin

☒ Alex Spangenberg
☒ Colin Holden
☐ Kessia Maitland

☐ Almeria Teacy
☐ Dalene Pillay
☐ Kim Engelbrecht

☐ Andromache Joselevitch
☐ Darryl Muller
☐ Lucky Mavuye

☐ Angie Roseborough
☐ Debbie Luger
☐ Malory Allibon

☐ Armando Reichelt
☐ Derrick Weeder
☐ Marc Rapsold

☐ Arv Huelin
☐ Edwell Msakiva
☐ Marius Engelbrecht

Contact

Full name: John Smith

Telephone: 031 123 4567

Email: john@email.co.za

Address

Existing: 26 Lavender Road

Address Line 1: 26 Lavender Road

Address Line 2: New Town

Suburb: Forest Hills

City: Durban

Province/State: KZN

Post Code: 1234

Country: South Africa

Case

Subject: Site Inspection

Information: Site Inspection

Value: 100000

Case Type: Corporate Customer

Source Type: Cold Call

Related Customers

Related Customers

No data to display

Next Activity

Salesman: Judith Mudzengi

Type: Site Inspection

Subject: Site Inspection

Comments: Site inspection at site 2

Activity Attendees

Attendees

Abigail Milne

Abigail Milne

5

Schedule

When: 13 Sep 2019 from 11:00 to 12:00

Reminder: Email SMS 30 minutes before scheduled start

Submit Options

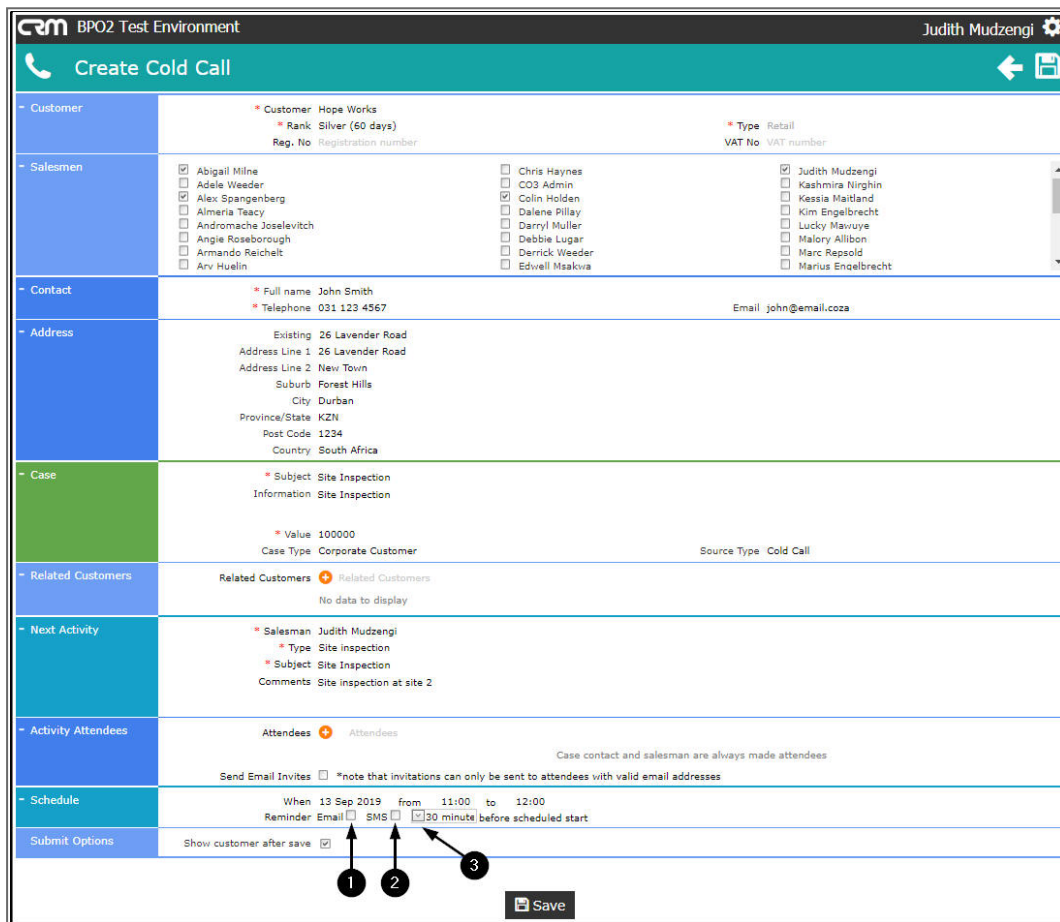
Show customer after save

Save

Schedule Section

- **When:** This field will be auto populated. Click on the **drop-down arrow** and select the relevant date.
- **From:** This field will be auto populated. Use the **up and down arrows** to select the relevant time.
- **To:** This field will be auto populated. Use the **up and down arrows** to select the relevant time.
- **Reminder:** If you wish to send a reminder to your attendees, you can choose whether to send the reminder by **Email** or **SMS**.
 1. Tick the **Email** check box if you wish to send the reminder by email.

2. Tick the **SMS** check box if you wish to send the reminder by SMS.
3. ' **Reminder Time** ': You can also choose when to send the reminder by clicking on the **drop-down arrow** and selecting the appropriate time period.
 - **Note:** Reminders will only work if your mobile number and email address have been configured in **BPO**.



CRM BPO2 Test Environment Judith Mudzengi

Create Cold Call

Customer
 * Customer: Hope Works
 * Rank: Silver (60 days)
 Reg. No: Registration number
 * Type: Retail
 VAT No: VAT number

Salesmen
☒ Abigail Milne
☐ Adele Weeder
☒ Alex Spangenberg
☐ Almeria Teacy
☐ Andromache Joselevitch
☐ Angie Roseborough
☐ Armando Reichelt
☐ Arv Huellin
☐ Chris Haynes
☐ CO3 Admin
☒ Colin Holden
☐ Dalene Pillay
☐ Darryl Muller
☐ Debbie Luger
☐ Derrick Weeder
☐ Edwell Msakva
☒ Judith Mudzengi
☐ Kashmira Ninghin
☐ Kessia Maitland
☐ Kim Engelbrecht
☐ Lucky Mavuye
☐ Malory Allibon
☐ Marc Repsold
☐ Marius Engelbrecht

Contact
 * Full name: John Smith
 * Telephone: 031 123 4567
 Email: john@email.coza

Address
 Existing: 26 Lavender Road
 Address Line 1: 26 Lavender Road
 Address Line 2: New Town
 Suburb: Forest Hills
 City: Durban
 Province/State: KZN
 Post Code: 1234
 Country: South Africa

Case
 * Subject: Site Inspection
 Information: Site Inspection
 * Value: 100000
 Case Type: Corporate Customer
 Source Type: Cold Call

Related Customers
 Related Customers + Related Customers
 No data to display

Next Activity
 * Salesman: Judith Mudzengi
 * Type: Site Inspection
 * Subject: Site Inspection
 Comments: Site inspection at site 2

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
 When: 13 Sep 2019 from 11:00 to 12:00
 Reminder: Email ☐ SMS ☐ 30 minute before scheduled start

Submit Options
 Show customer after save ☒

Save

Submit Option Section

- **Show customer after save:** This will be selected by default. Unselect if you do not wish to see the customer after saving.

CRM BPO2 Test Environment
Judith Mudzengi

Create Cold Call

Customer

Customer: Hope Works

Rank: Silver (60 days)

Reg. No. Registration number

Type: Retail

VAT No. VAT number

Salesmen

☒ Abigail Milne
☐ Adele Weeder
☒ Alex Spangenberg
☐ Almeria Teacy
☐ Andromache Joselevitch
☐ Angie Roseborough
☐ Armando Reichelt
☐ Anv Huelin

☐ Chris Haynes
☐ CO3 Admin
☒ Colin Holden
☐ Dalene Pillay
☐ Darryl Muller
☐ Debbie Lugar
☐ Derrick Weeder
☐ Edwell Msakiva

☒ Judith Mudzengi
☐ Kashmira Ntshini
☐ Kessia Maitland
☐ Kim Engelbrecht
☐ Lucky Mawuye
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Case

Subject: Site Inspection

Information: Site Inspection

Value: 100000

Case Type: Corporate Customer

Source Type: Cold Call

Related Customers

Related Customers

No data to display

Next Activity

Salesman: Judith Mudzengi

Type: Site inspection

Subject: Site Inspection

Comments: Site inspection at site 2

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

When: 16 Sep 2019 from 11:00 to 12:00

Reminder: Email ☒ SMS ☐ 15 minutes before scheduled start

Submit Options

Show customer after save: ☒

Save

Save

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

CRM BPO2 Test Environment
Judith Mudzengi

Create Cold Call

Customer

Customer: Hope Works
Rank: Silver (60 days)
Reg. No: Registration number
Type: Retail
VAT No: VAT number

Salesmen

☒ Abigail Milne
☐ Adele Weeder
☒ Alex Spangenberg
☐ Almeria Teacy
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Related Customers + Related Customers
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Next Activity

Salesman: Judith Mudzengi
Type: Site inspection
Subject: Site Inspection
Comments: Site inspection at site 2

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

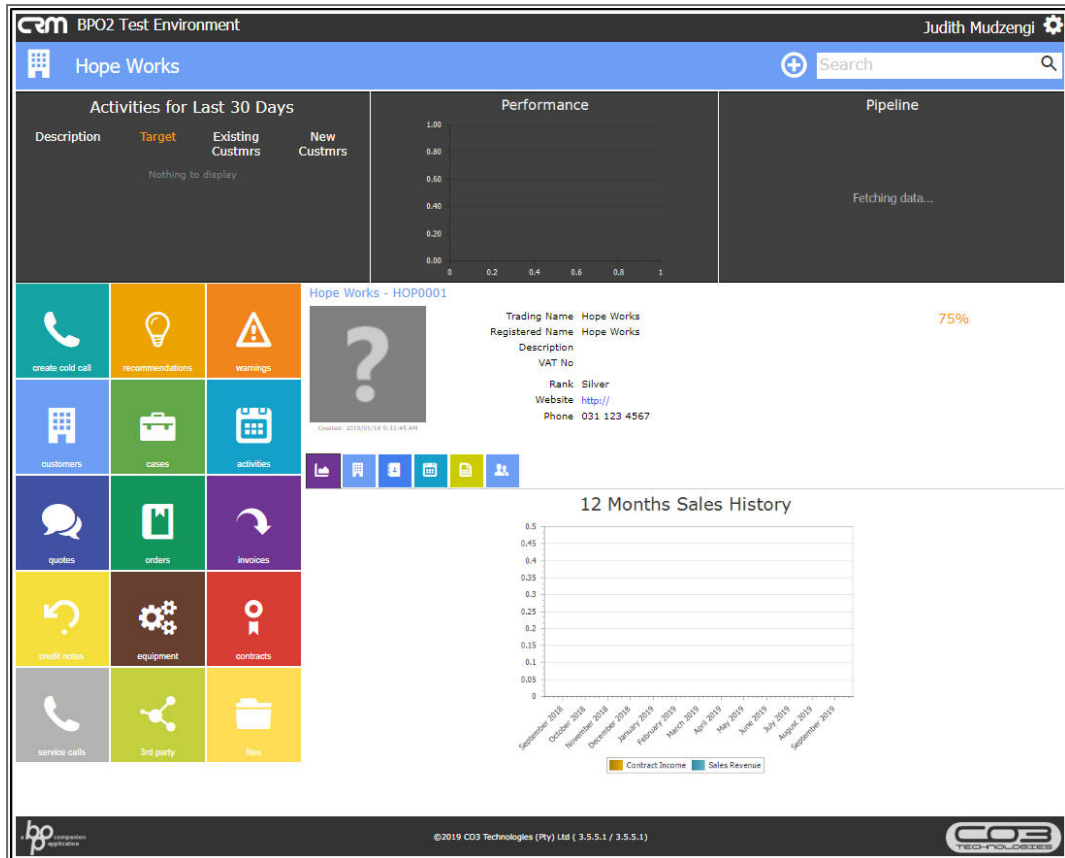
When: 16 Sep 2019 from 11:00 to 12:00
Reminder: Email ☒ SMS ☐ 15 minutes before scheduled start

Submit Options

Show customer after save: ☒

1 → Save

- The **Customer Dashboard** will be displayed.
- The newly added customer can be viewed in this screen.



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