

# SALES CONNECT

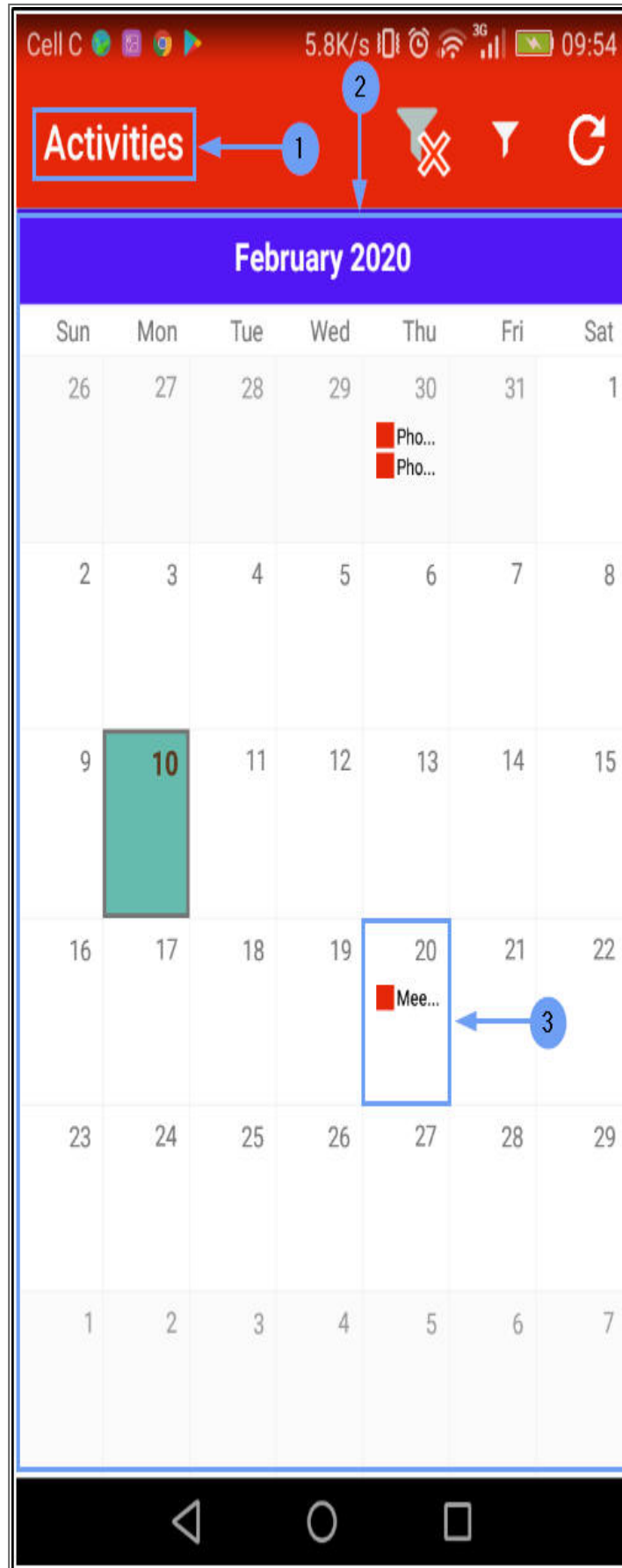
## LINK IMAGE OR PHOTO TO AN ACTIVITY

You can link an image directly to an **Activity Case** in Sales Connect. This image will pull through to the **Case** section of the Save Activity page in **CRM** where it can be downloaded, viewed, edited or deleted, as required.

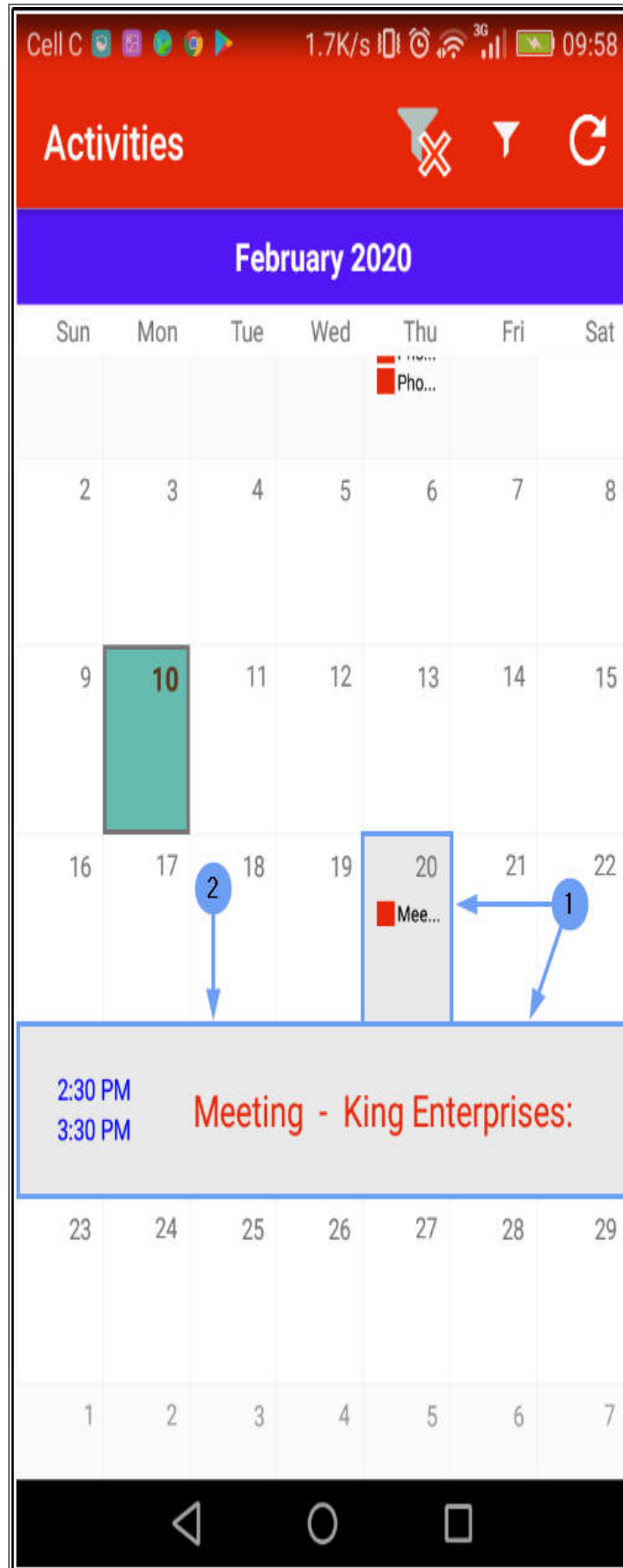
### SELECT THE ACTIVITY

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1. After [initial login](#) to Sales Connect the Activities screen will open.
2. This will display a **calendar view** of the current month.
  - i. Swipe left to view **future** months.
  - ii. Swipe right to view **previous** months.
3. Tap on the **date** that contains the Activity that you wish to link an **image** to.



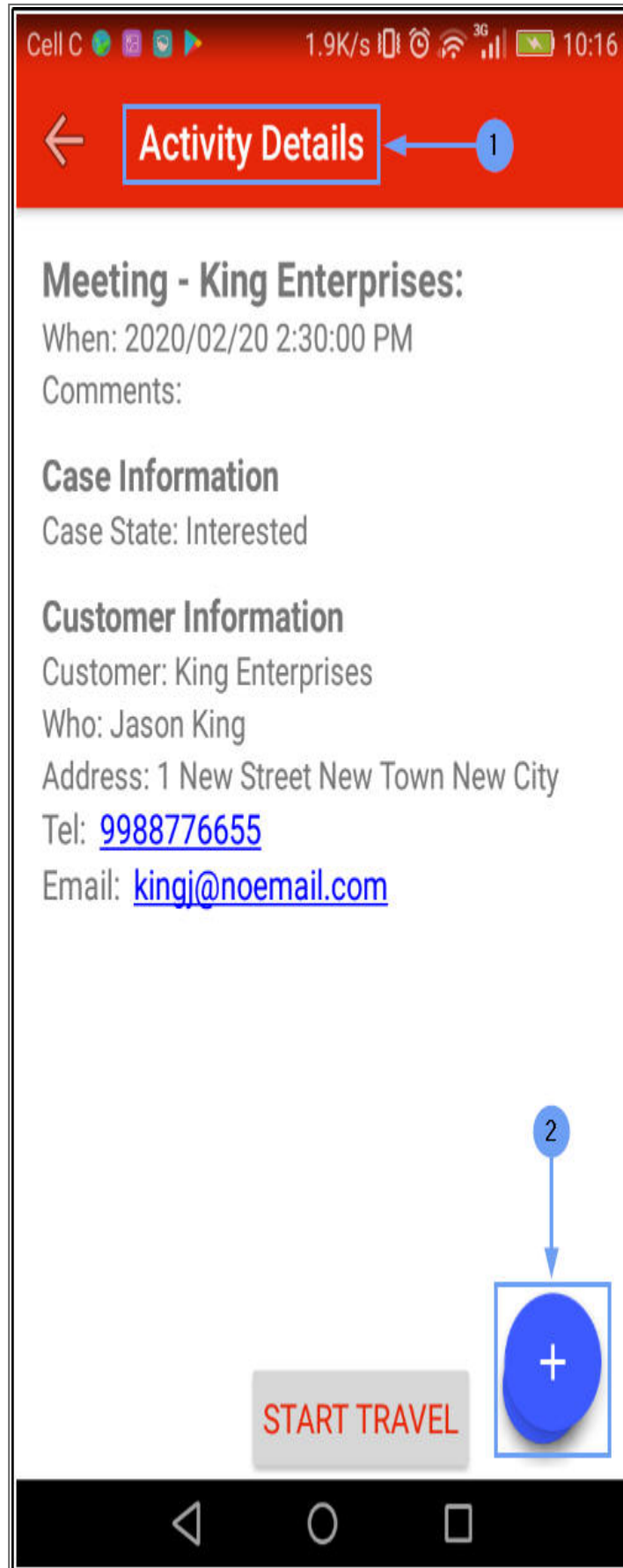
1. A **text box** will pop up with more information regarding the activity.
2. Tap on this text box.



## THE ACTIVITY DETAILS SCREEN

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1. The **Activity Details** screen will be displayed.
2. Tap on the **Expand** icon.



## THE ACTIVITY EDIT BUTTONS

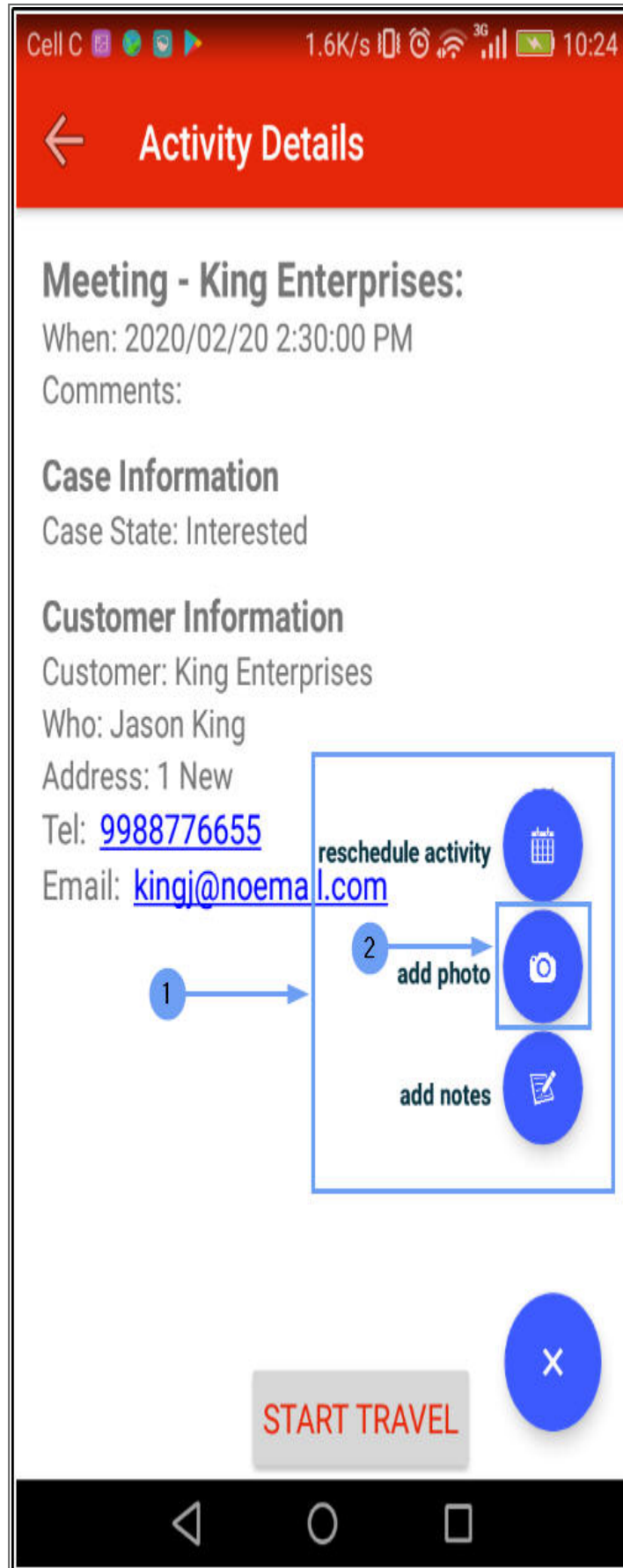
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1. The screen will now display **3** editing buttons:
  - i. [reschedule activity](#)
  - ii. **add photo**
  - iii. [add notes](#)

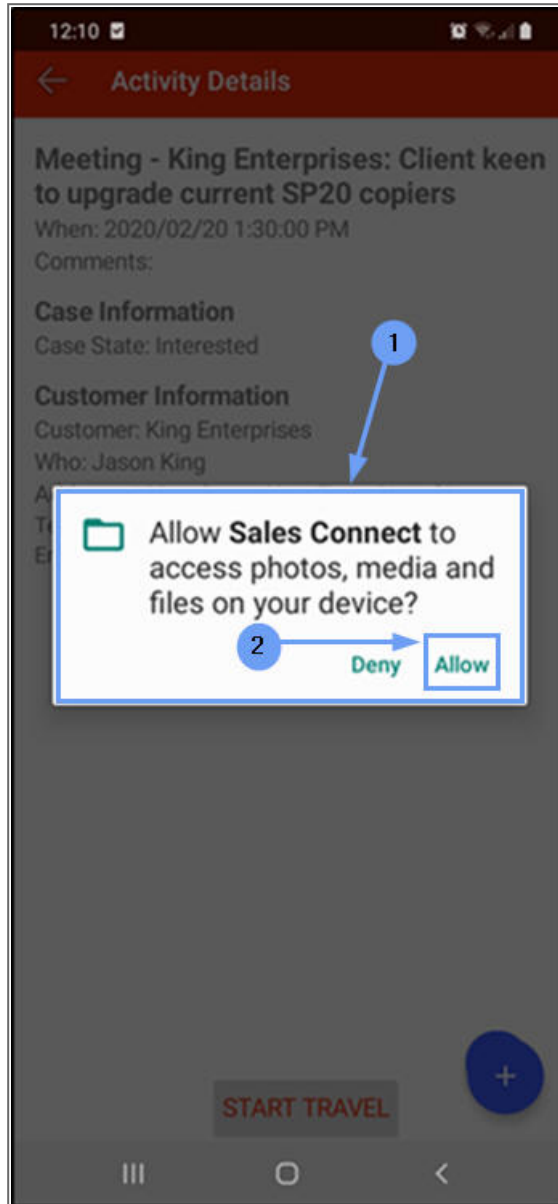
## ADD PHOTO

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2. Tap on **add photo**.



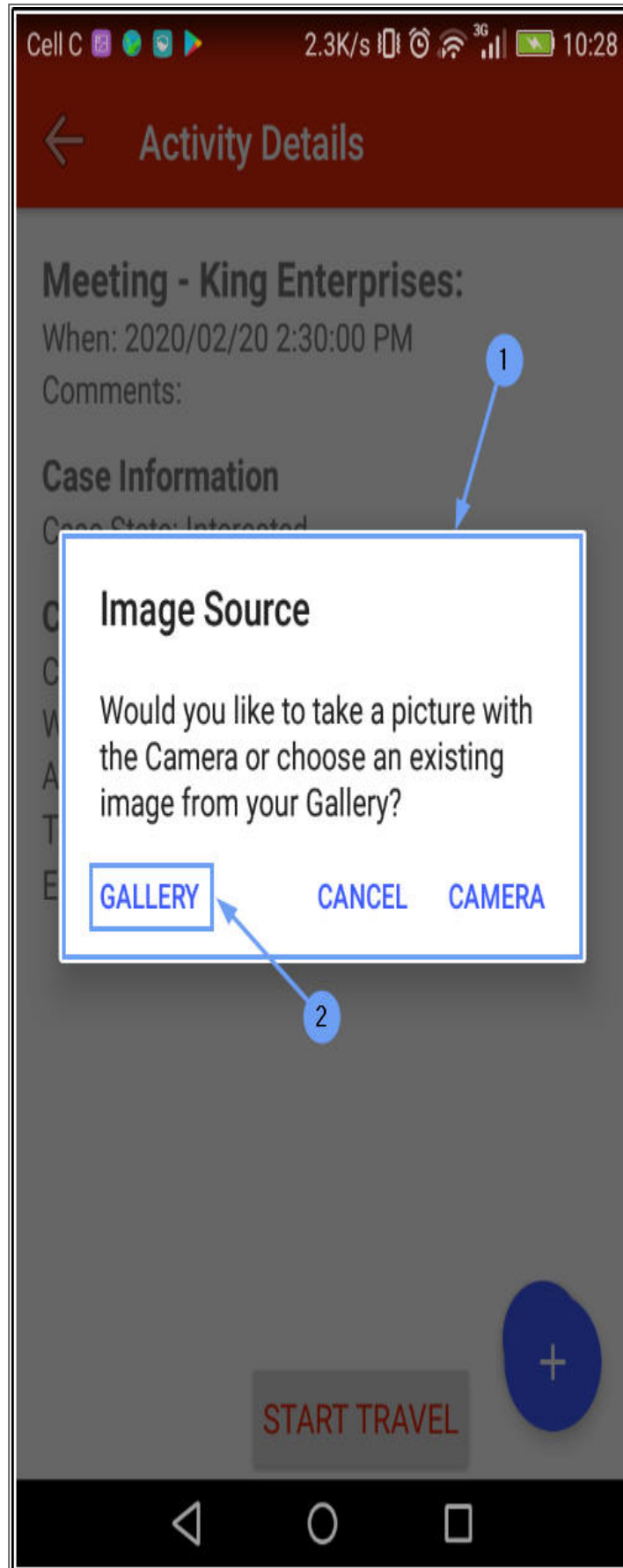
1. An **Access** message box may pop up in this screen asking;
  - *Allow Sales Connect to access photos, media and files on your device?*
2. Tap on **Allow**.



## I. SELECT IMAGE SOURCE - GALLERY

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1. An **Image Source** message box will pop up asking;
  - *Would you like to take a picture with the Camera or choose an existing image from your Gallery?*
2. Tap on **Gallery**.

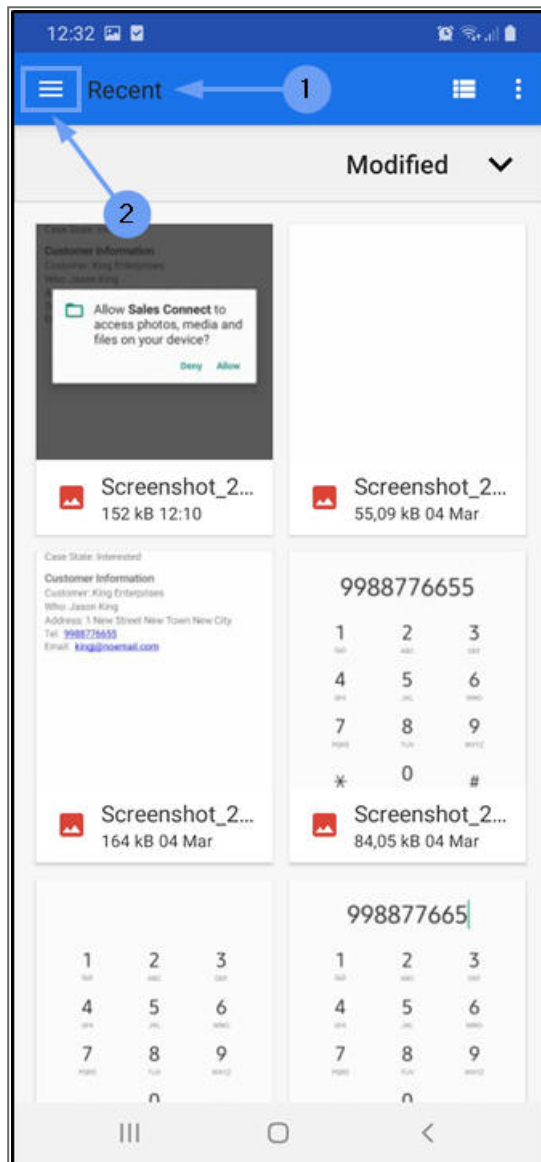


1. For convenience, the **Recent** screen will open with the most recently taken images displayed.

## II. SELECT IMAGE FROM OTHER SOURCES

You will have the option to select images from other sources depending on the contents of your device.

2. Tap on the **menu** button.



1. The **Open from** screen will be displayed.
2. There are 4 different image sources linked to this particular device:
  - **Images**
  - **Recent**
  - **Downloads** and
  - **SD card**
3. In this example, **Images** is selected.

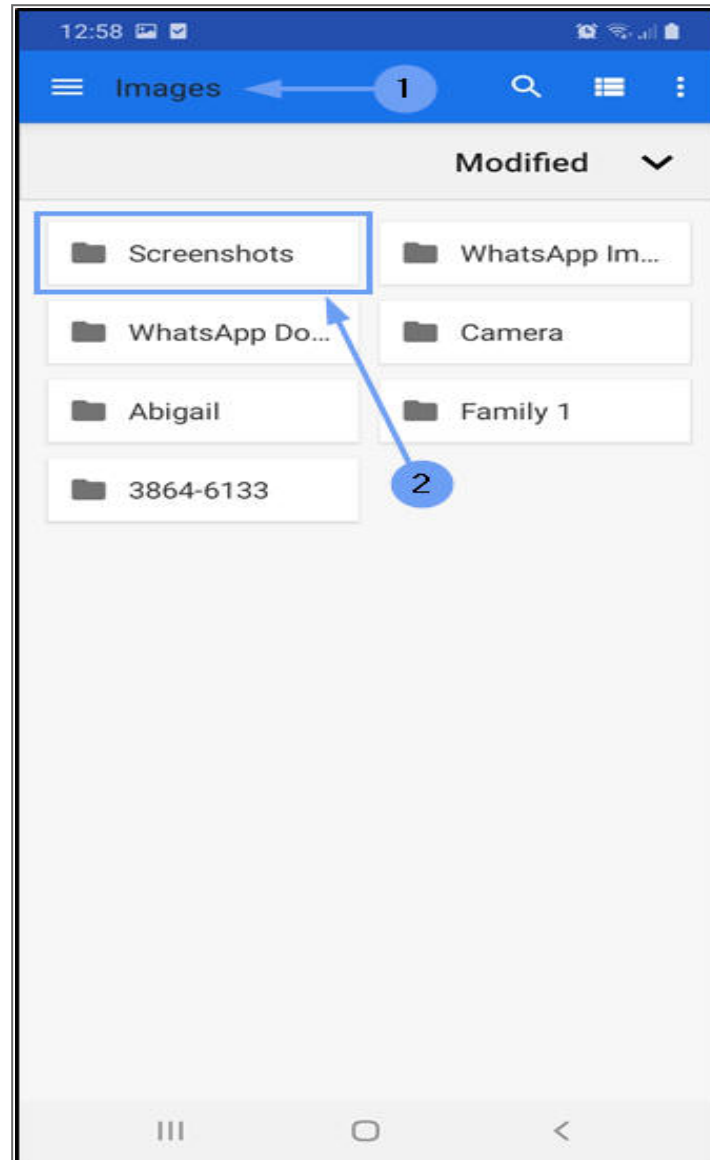


1. The **Images** screen will open.

## Select Image Folder

You will have the option to select images from different folders - depending on the contents of your device.

2. Tap on the selected folder - in this example, **Screenshots**.

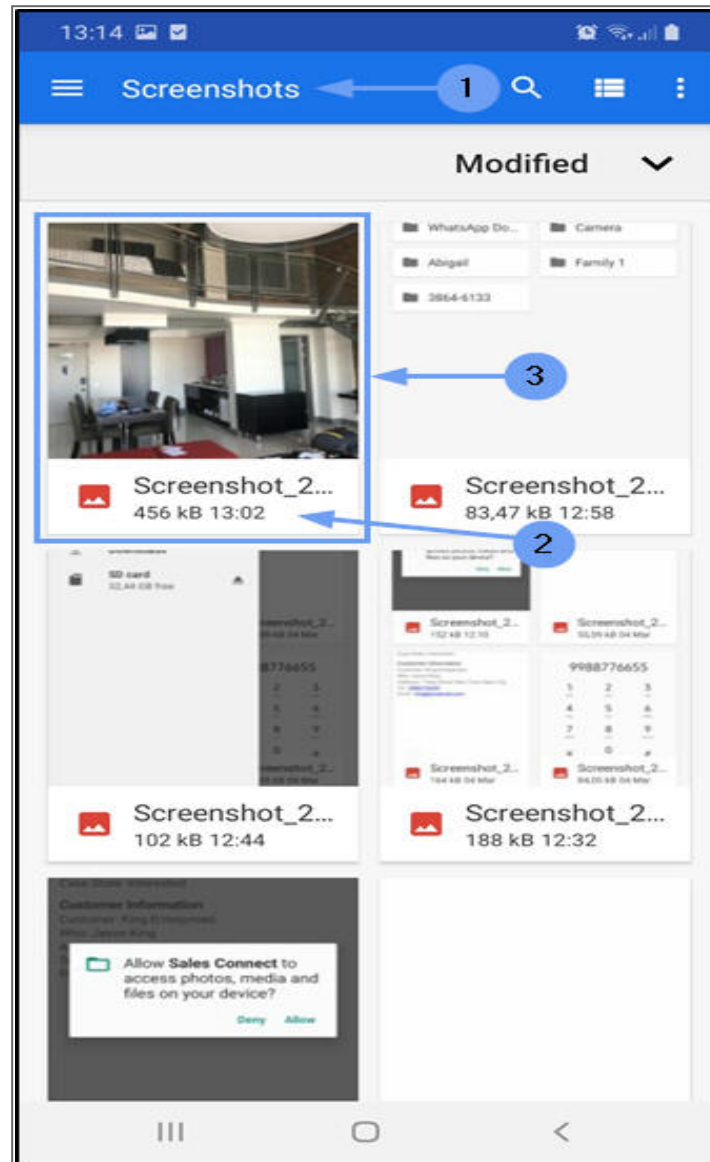


1. The **Screenshots** screen will open with the most recent screenshots - that have been uploaded to your device - displayed first.

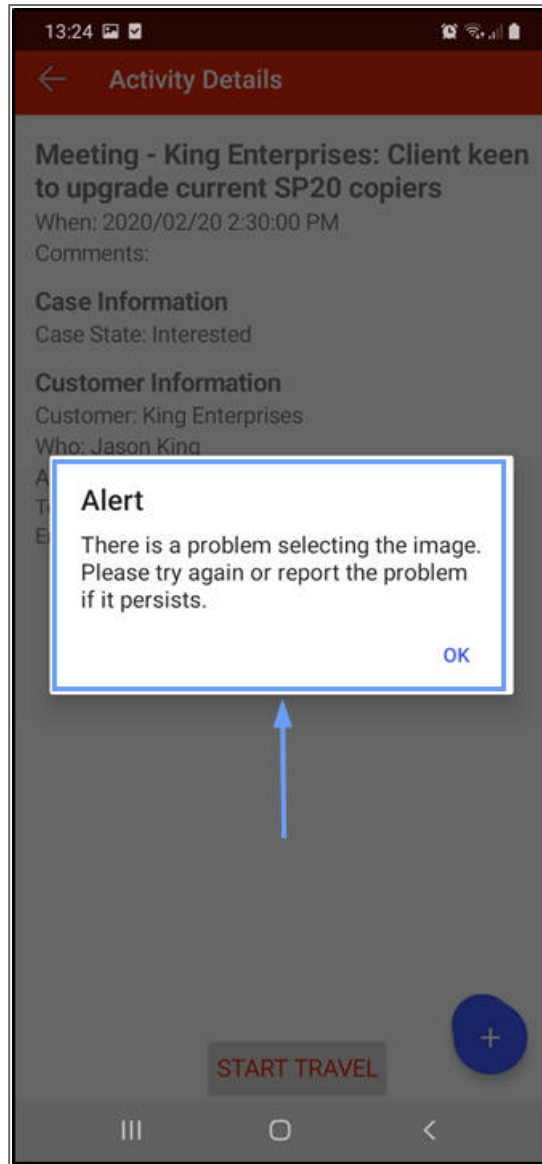
2. The **Time** and **File Size** will be listed at the foot of each image.

## Select Image

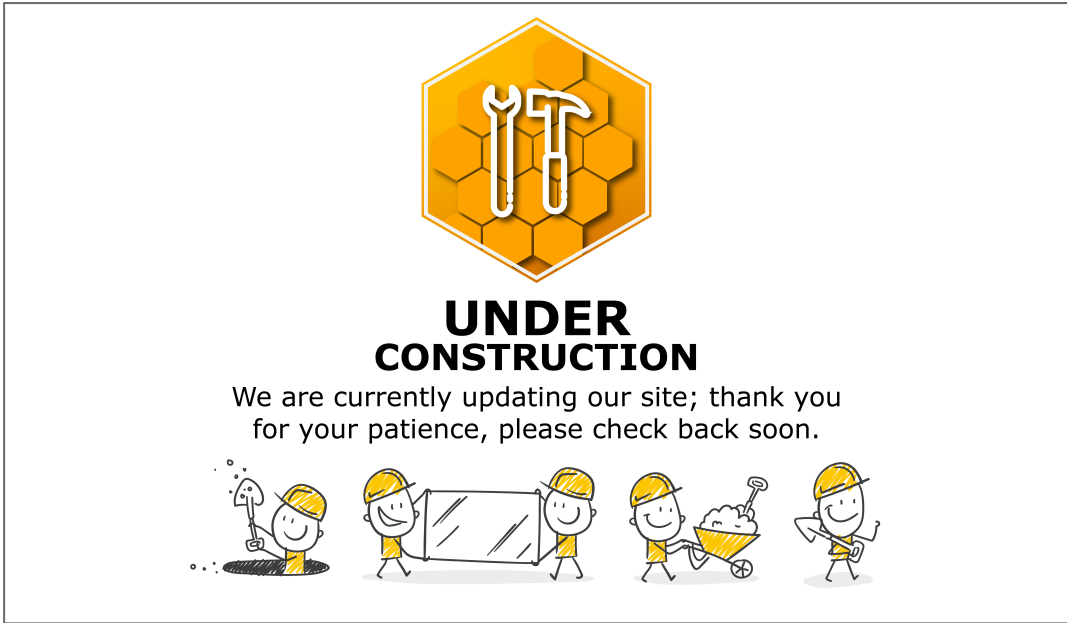
3. Tap on the **image** that you wish to link to your selected activity.



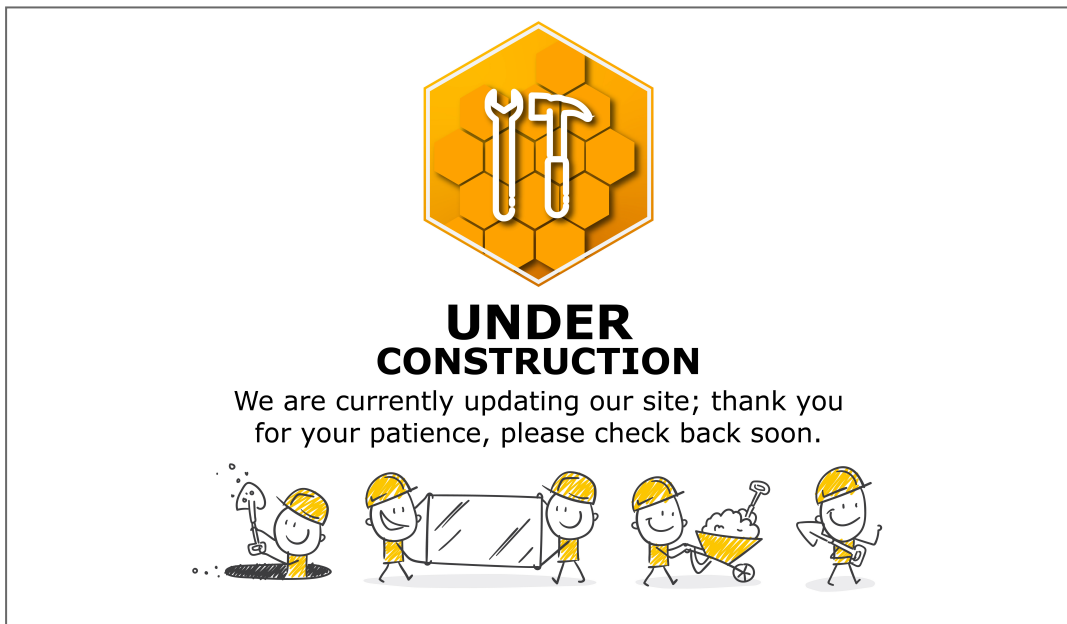
1. Process under construction...
2. Text...
3. Text...



1. Process under construction...
2. Text...
3. Text...

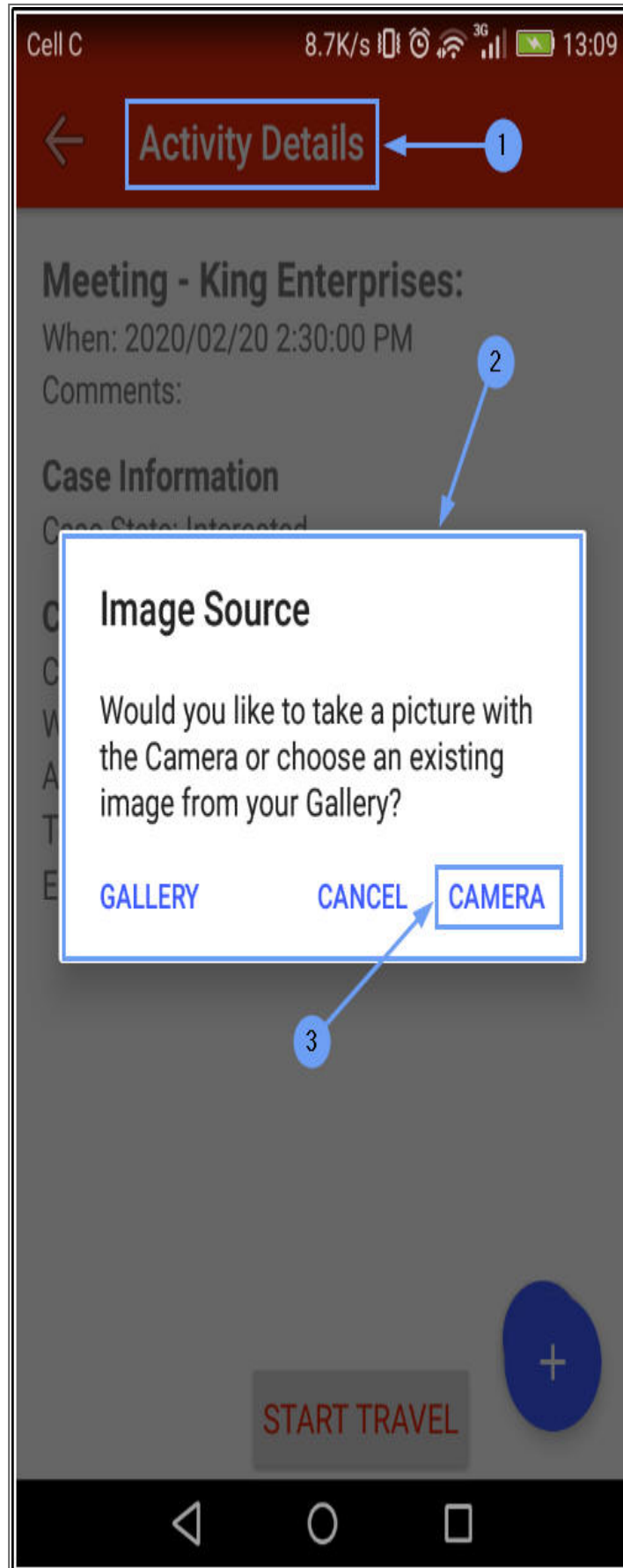


1. Process under construction... .
2. Text...
3. Text...

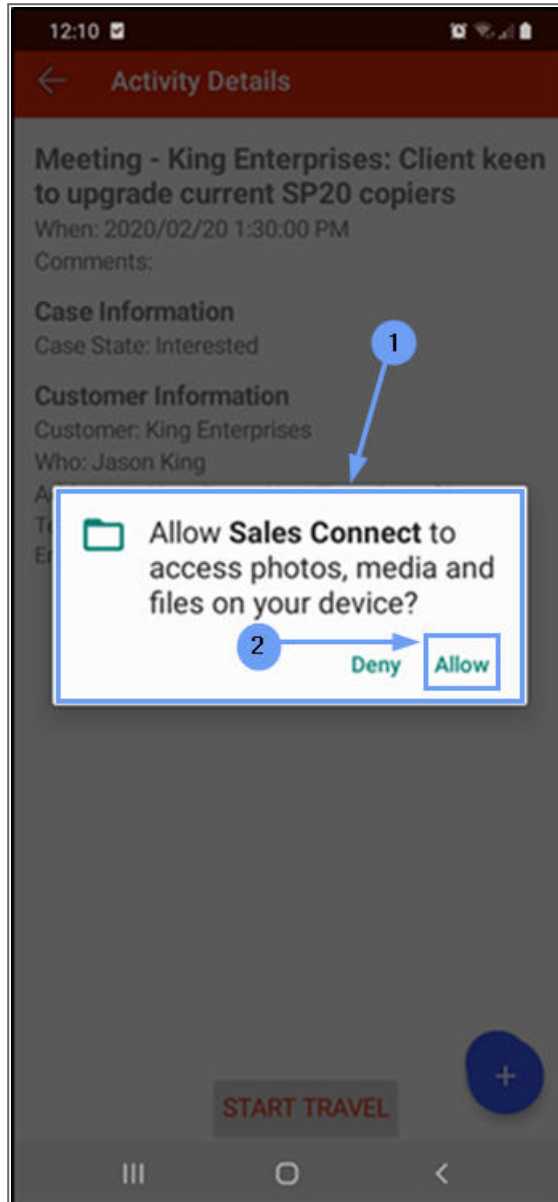


iii. Select Image Source - Camera

1. In the [Activity Details](#) screen, after you have selected [add photo](#),
2. the **Image Source** message box will pop up.
3. Select **Camera**.



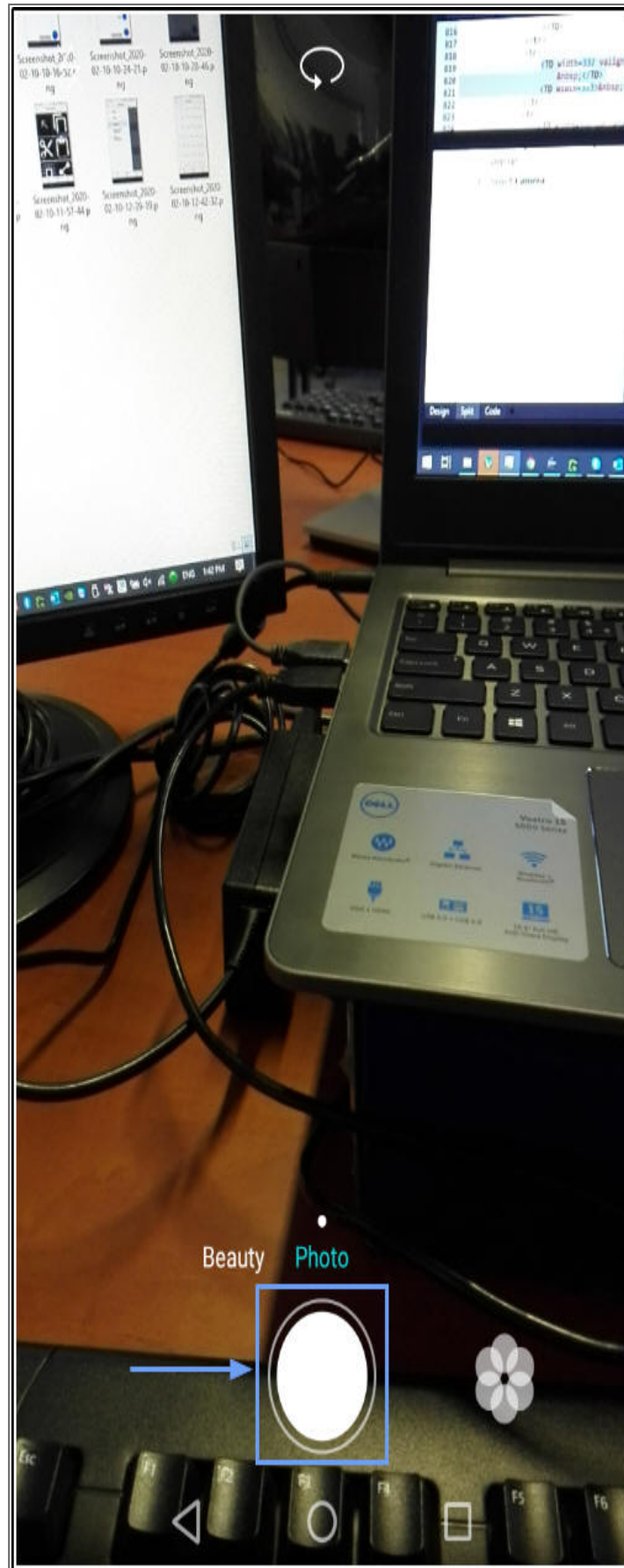
1. A message box may pop up in this screen asking;
  - *Allow Sales Connect to access photos, media and files on your device?*
2. Tap on **Allow**.



### ***The Camera Capture Screen***

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- The **Capture** screen will open on your device.
- When you have selected the scene that you wish to record/- photograph, tap on **Capture**.

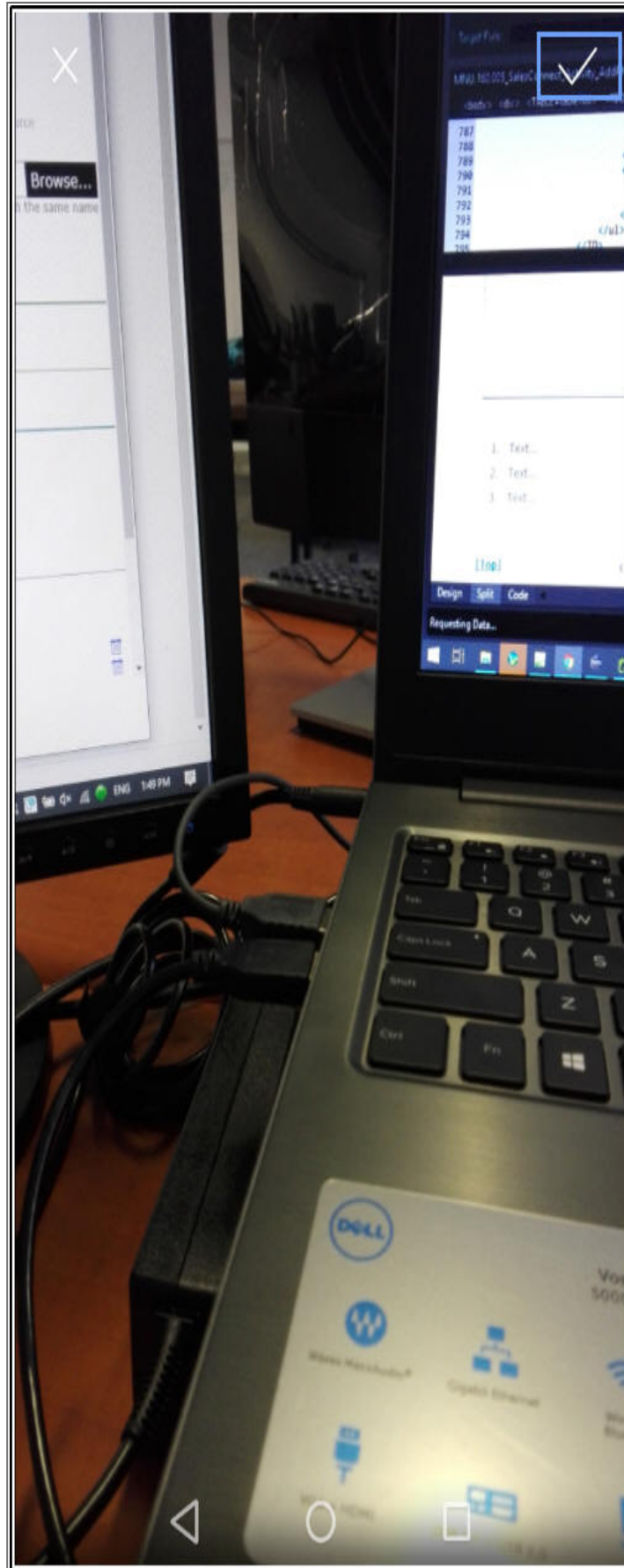


- Your captured image will be displayed on the screen.

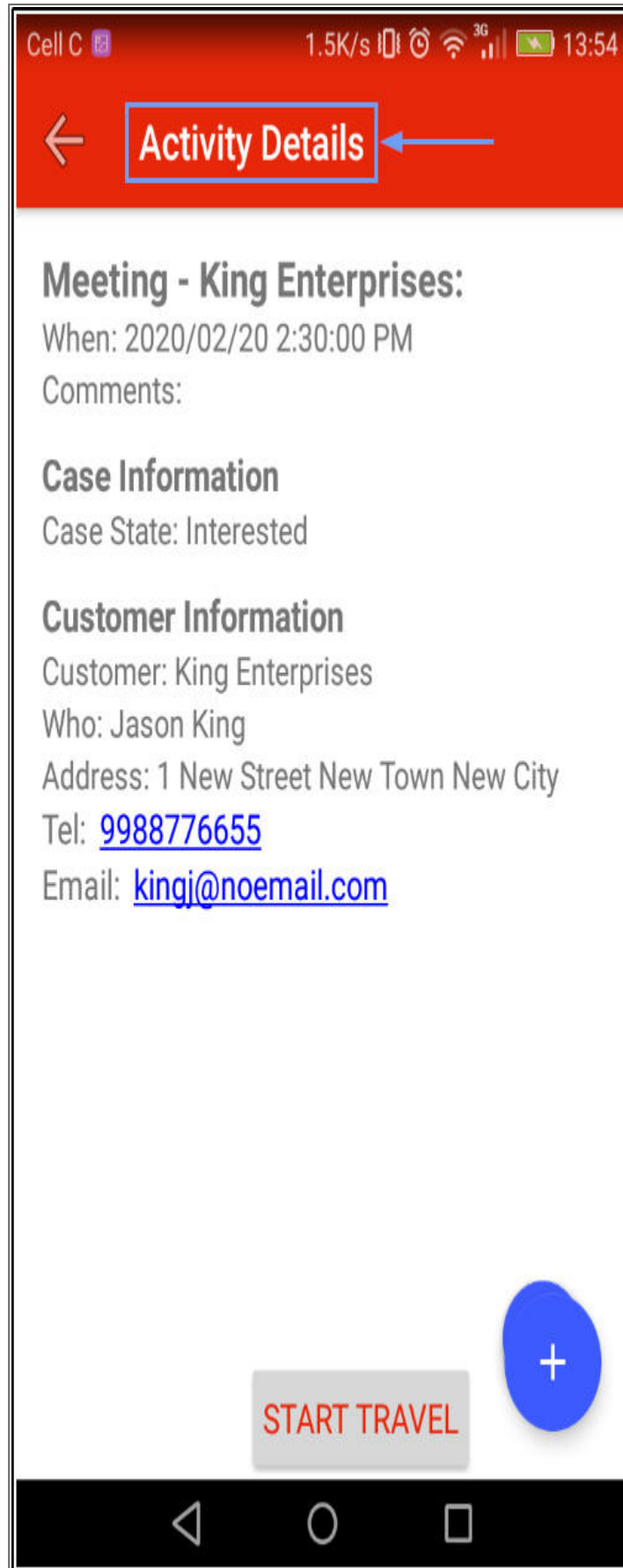
### **SAVE IMAGE**

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- Tap on the **Save/OK** button (specific to your device).



- Your image will be [linked to the selected activity in CRM](#) and you will return to the **Activity Details** screen.



## VIEW LINKED IMAGE IN CRM

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1. Log in to your **CRM Dashboard**.
2. Select the **Activities** tile.

CRM Example Company
Abigail Milne

Dashboard

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### Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Email	30	0	0
Meeting	20	0	0
On Site inspection	20	0	0
Phone call	20	1	0

### 1 Month Performance

### 4 Month Pipeline

📞	15 Oct 2019	19	12
create cold call	recommendations	warnings	warnings
🏢	75	13	11
customers	cases	activities	activities
💬	15	148	8
quotes	equipment	3rd party	3rd party

Today
Recent
Calendar

Schedule Date	Status
No data to display	

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1. The **My Activities** page will open.
2. Hover over the Activity (that is linked to the image) until the **Actions buttons** are displayed.
3. Select **View/Edit this Activity**.

**CRM Example Company** Abigail Milne

**My Activities** ← 1 ← ↻

Schedule Date	Status
Meeting - Liberty Jones: Potential 4 new machines on site	
When: 10 Mar 2020, 12:00-14:00	
Who: Jemma Jones, Liberty Jones	
Tel: 0120230340	Cell: 0120230340
Email:	Bus: 0120230340
Meeting - King Enterprises: <span style="float: right;">3 → </span>	
When: 20 Feb 2020, 14:30-15:30	
Who: Jason King, King Enterprises	
Tel: 9988776655	Cell: 0113456789
Email: kingj@noemail.com	Bus: 0113456789
Phone call - Hope Works: New deal proposal	
When: 30 Jan 2020, 16:05-17:00	
Who: Jackie Samuels, Hope Works	
Tel: 031 123 4567	Cell: 031 123 4567
Email: standard@noemail.co.za	Bus: 031 123 4567
Phone call - Liberty Jones: Discuss new products	
When: 30 Jan 2020, 16:00-17:00	
Who: Davina Rowe, Liberty Jones	
Tel:	Cell: 0120230340
Email:	Bus: 0120230340
On Site inspection - Liberty Jones: Proposal to set up new site	
When: 20 Jan 2020, 12:00-13:00	
Who: Mark Jackson, Liberty Jones	
Tel: 100 200 3000	Cell: 0120230340
Email: mjackson@noemail.com	Bus: 0120230340
Phone call - Lovely Test Customer: Customer keen to discuss upgrade	
When: 6 Dec 2019, 13:00-14:00	
Who: Mr Lovely, Lovely Test Customer	
Tel: 324234	Cell: 324234
Email:	Bus: 324234

1. The **Save Activity** page will open.
2. Expand the **Case** section.

crm Example Company Abigail Milne

**Save Activity**

	Case	Subject Machine Upgrade
	Case State	*Case State Interested (20%) Percentage 20%
	Activity	*Type Meeting Address 1 New Street New Town New City *Subject The subject of the activity  Comments Information relating to the activity
Activity Attendees	Attendees	<ul style="list-style-type: none"><li> Abigail Milne</li><li> Jason King</li><li> Belinda Sharman </li><li> Carolina Lourens </li></ul> Page 1 of 1 (4 items)  [1]  Page size: 10
Schedule	Date	20 Feb 2020 from 14:30 to 15:30 Reminder Email <input type="checkbox"/> SMS <input type="checkbox"/> ... 37 days before scheduled start
	Quote	

Save

1. You can now view more details regarding the Case.
2. Go to the **Attachments** section.
3. You can see that a file is linked to this activity, click on the **file name**.

The screenshot shows a CRM interface for 'Example Company' with user 'Abigail Milne'. The main section is titled 'Save Activity' and contains several tabs: Case, Related Customers, Case State, Activity, and Activity Attendees. The 'Case' tab is active, displaying fields for Customer, Contact, Salesman, Subject, Value, Case Type, Case Date, Source Type, and Expected Completion. An 'Attachments' section is visible with a 'Browse...' button and a list of files. A file named '132\_10-Feb-2020\_13\_53\_54.jpg' is highlighted with a red box and a red circle labeled '2'. A red circle labeled '1' is positioned above the 'Save Activity' header, with arrows pointing to the 'Save' button at the bottom of the form.

CRM Example Company Abigail Milne

Save Activity

Case

- \*Customer King Enterprises
- \*Contact Jason King
- \*Salesman Abigail Milne
- \*Subject Machine Upgrade

Information Potential 4 new machines

\*Value 40000.00

Case Type Type of Case Source Type The type of source

Case Date 30 Jan 2020 Expected Completion 6 Feb 2020

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.

132\_10-Feb-2020\_13\_53\_54.jpg

Related Customers Related Customers + Related Customers  
King Enterprises - KIN0002

Case State

Activity

- \*Type Meeting
- Address 1 New Street New Town New City
- \*Subject The subject of the activity

Comments Information relating to the activity

Activity Attendees Attendees +

Save

1. In the bottom left of the page, a **download notification box** will appear. Click on this box.

CRM Example Company Abigail Milne

Save Activity

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**Case**

- \*Customer King Enterprises
- \*Contact Jason King
- \*Salesman Abigail Milne
- \*Subject Machine Upgrade

Information Potential 4 new machines

\*Value 40000.00

Case Type Type of Case Source Type The type of source

Case Date 30 Jan 2020 Expected Completion 6 Feb 2020

Attachments  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.

132\_10-Feb-2020\_13\_53\_54.jpg

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**Related Customers**

Related Customers Related Customers

- King Enterprises - KIN0002

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**Case State**

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**Activity**

- \*Type Meeting
- Address 1 New Street New Town New City
- \*Subject The subject of the activity

Comments Information relating to the activity

Save

---

132\_10-Feb-2020\_...jpg Show all

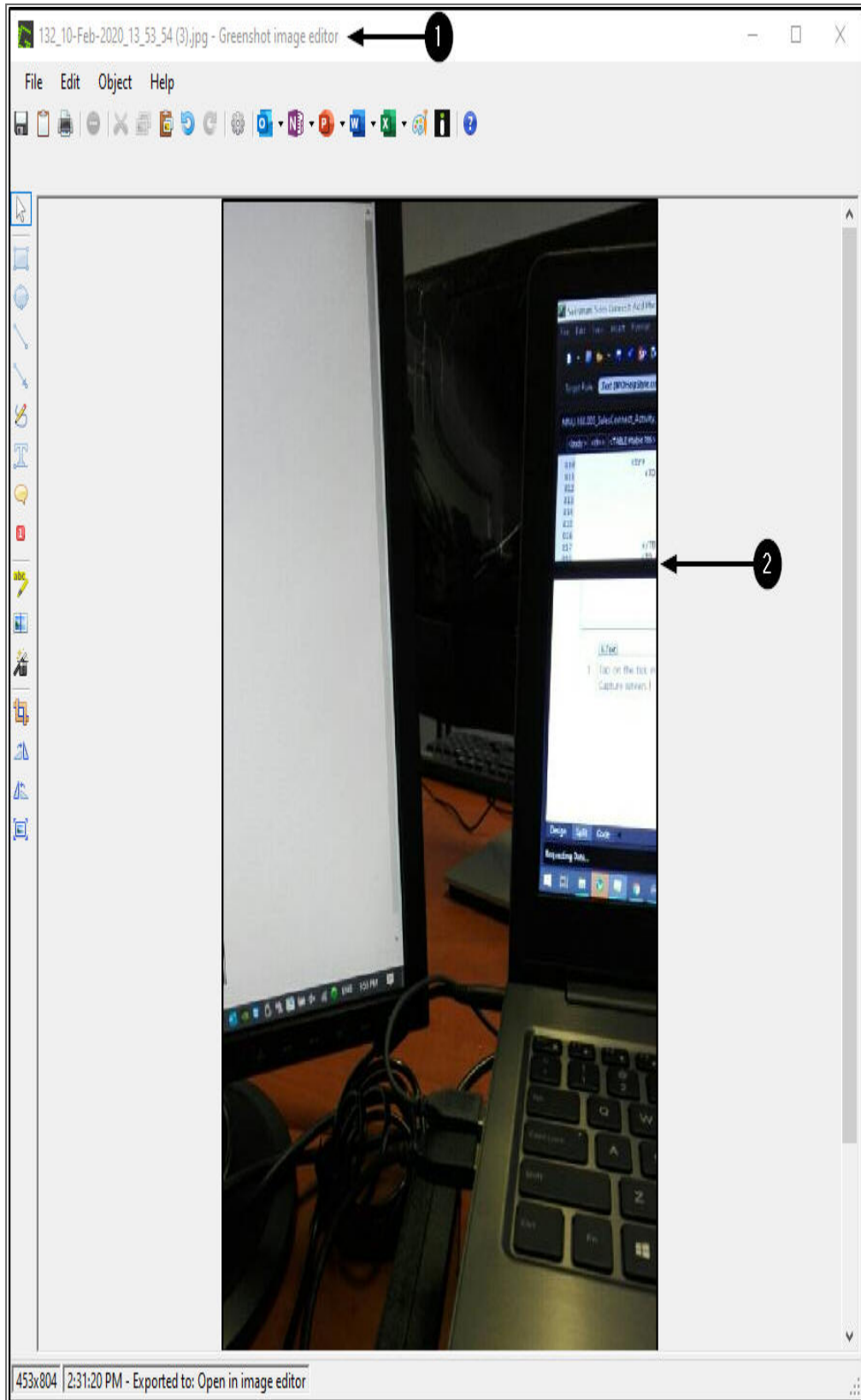
1. You will be prompted to select a method of opening the image file.
2. In this example, **Greenshot image editor** is selected.

The screenshot shows a web browser window with the URL `localhost:50000/BPOCRM/MaintainActivity.aspx?ActivityID=286&case_info=1&case_info_state=2&case_info_clo...`. The page title is "Save Activity" and the user is "Abigail Milne". The main content area displays case details: Customer (King Enterprises), Contact (Jason King), Salesman (Abigail Milne), and Subject (Machine Upgrade). Information includes "Potential 4 new machines" and a value of 40000.00. Case details include Case Type (Type of Case), Source Type (The type of source), Case Date (30 Jan 2020), and Expected Completion (6 Feb 2020). The Attachments section shows a file named "132\_10-Feb-2020\_13\_53\_54.jpg" with a "Browse..." button. A context menu is open over the image, with "Open in image editor" selected. A "Save" button is visible at the bottom right of the menu.

1

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1. The image editor will open.
2. You can now view your image.



### Related Topics

- [Sales Connect - Overview and Index](#)
- [Sales Connect - Download and Log In / Out](#)
- [Sales Connect - Environment](#)
- [Sales Connect - Edit Activity Details](#)
- [Sales Connect - Add Notes to an Activity](#)
- [Sales Connect - Link Start and End Travel to an Activity](#)
- [CRM](#)

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