How to Use the Activity Manager (formerly called Call Manager)

Description

Navigate to the Activity Manager tab to see all your tasks and events on one convenient screen. Streamline your work blocks for better efficiency.

The system will:

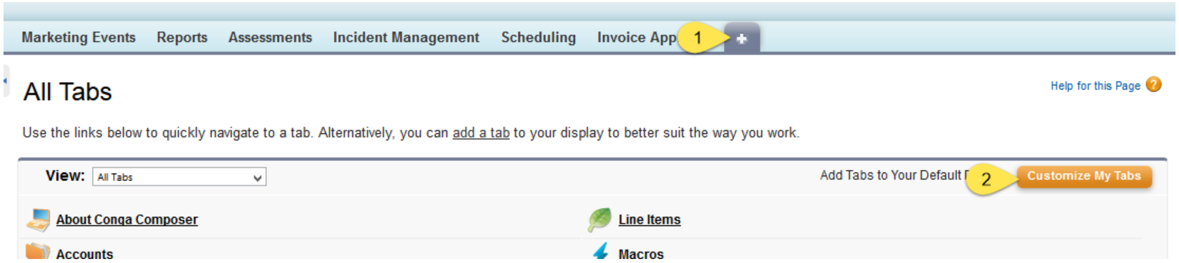
- Allow you to view, edit, and complete tasks and events on one convenient page
- Allow you to quickly and easily update the prospect profile
- Allow you to create a follow-up activity

Step by Step

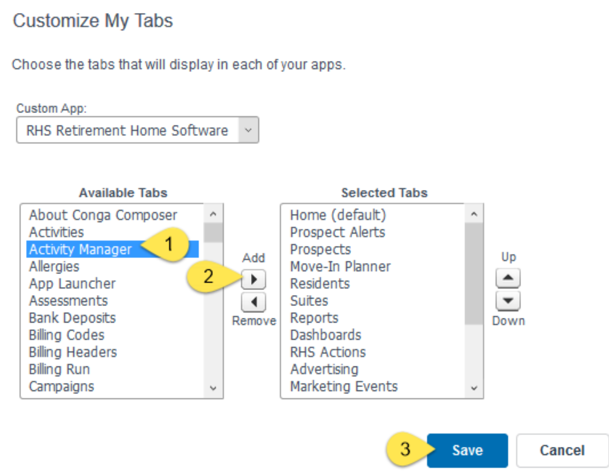
Set-up

Set up your Activity Manager tab to easily access the Activity Manager.

1. Click the plus sign to the right of your tabs
2. Click **Customize My Tabs**



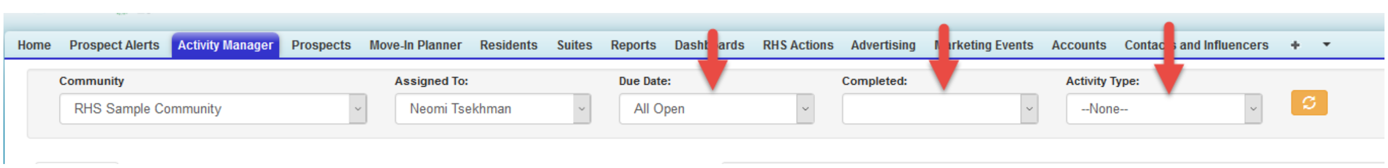
3. Select *Activity Manager* from the list of **Available Tabs** on the left
4. Click the arrow to move Activity Manager to the list of **Selected Tabs** on the right
5. Moving the Activity Manager tab up on the list will place it closer to your Home tab
6. Click **Save**



Manage Calls

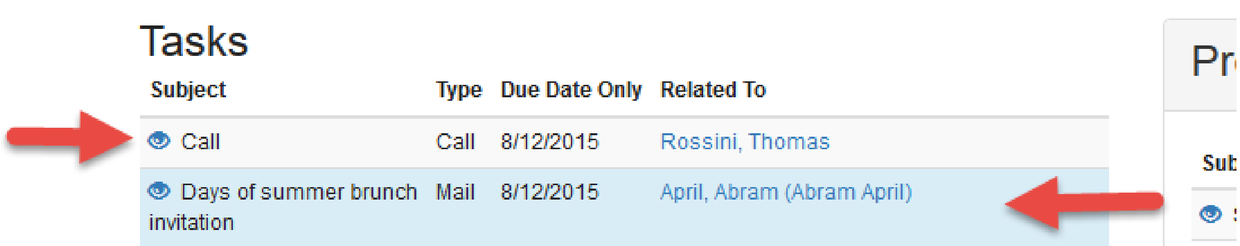
7 Navigate to your **Activity Manager** tab

8 At the top, you may select the **Due Date** or **Activity Type** to view different types of activities. To see all open activities, select *All Open* for the **Due Date** and *None* for the **Activity Type.** You may also use the Activity Manager to audit completed activities by using the **Completed** filter.

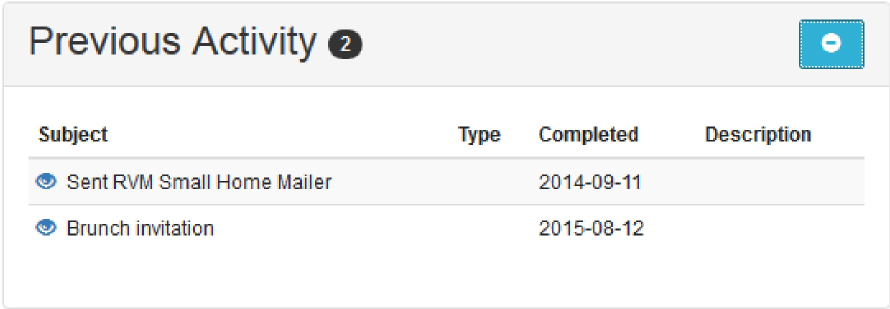


9 On the left-hand side of your screen, you will see a list of your tasks. The task you are currently viewing will be highlighted in blue.

10 To view the task record, click on the eye ball to the left of the Subject

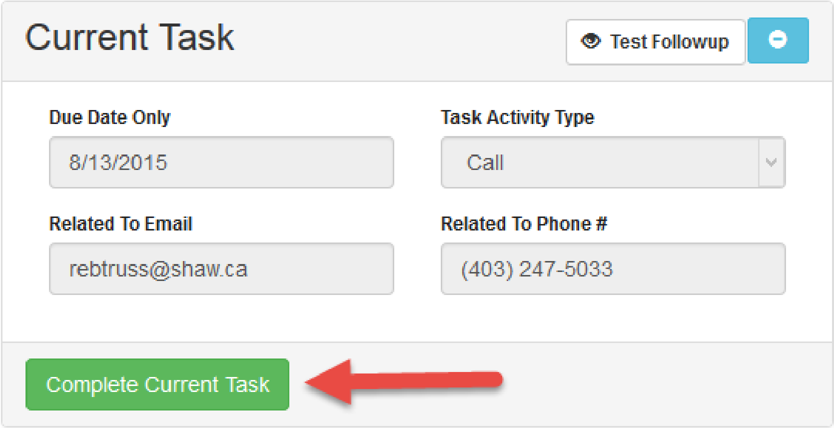


11 On the right-hand side of your screen, you can view the Previous Activity logged on this Prospect's file



12 The **Current Task** section shows some important task details, such as the **Due Date**, **Phone #**, and **Activity Type**.

13 To complete the task and enter a Result, click **Complete Current Task**

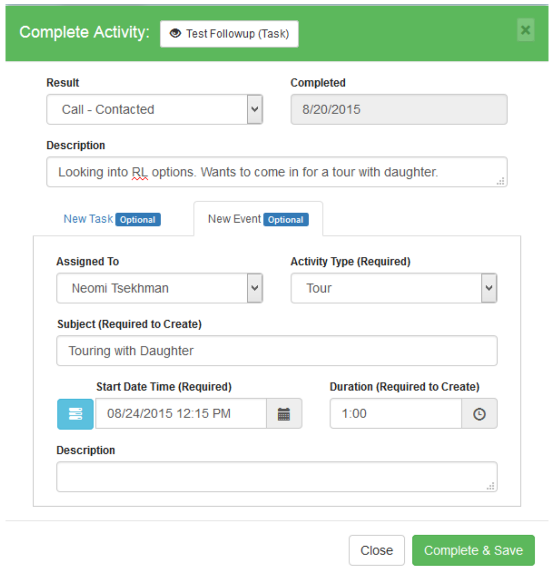


14 Select a **Result**

15 Enter an optional **Completion**

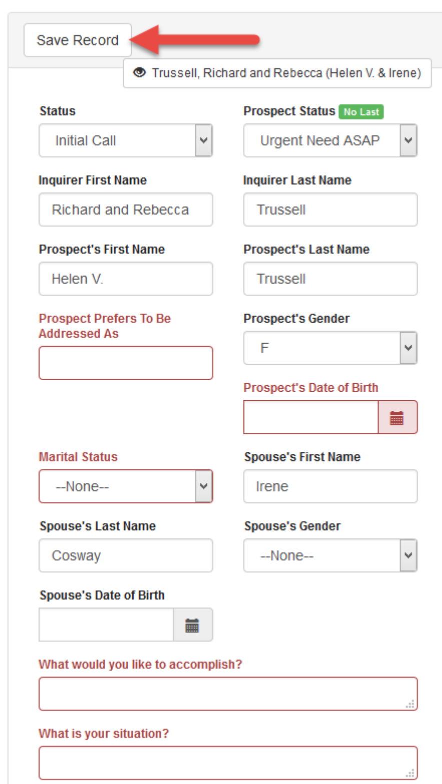
16 You are encouraged to create a follow-up Task or Event directly from this completion screen. Simply enter the new Task or Event details.

17 Click **Complete & Save**



18 As you complete your calls, you can see a small section of the Prospect profile on the right-hand side of the screen. Enter information directly into the fields on this screen. Fields with missing information are highlighted in red.

19 After entering new information in the Prospect section, remember to click **Save Record**



Sales Coaching

To use the Call Manager as a sales coaching tool, you may use the **Completed** filter at the top of the page. This will show completed activities for a given time period, along with all related activity, completion, and prospect information.