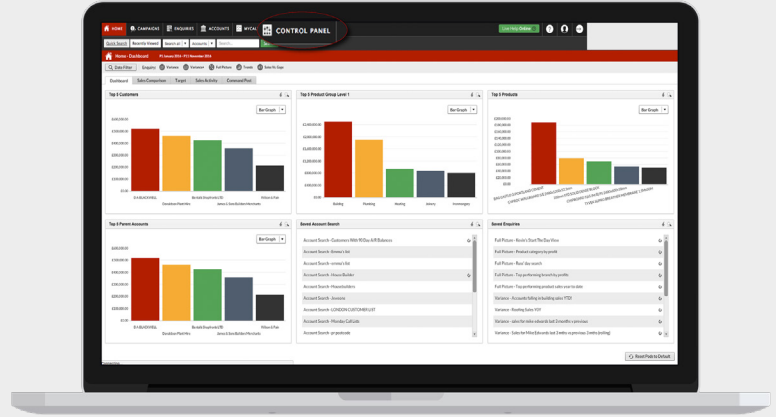


HOW TO CREATE AN ACTIVITY TARGET (POWER USERS ONLY)

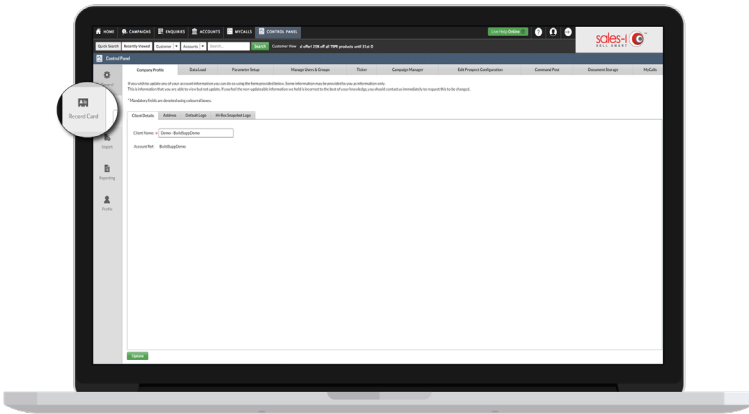
This guide will show you how to score the drop down options in the Record Card to encourage your team to focus on the behaviours that lead to sales.

Please note: The 'Sales Activity' section is a paid for add-on.

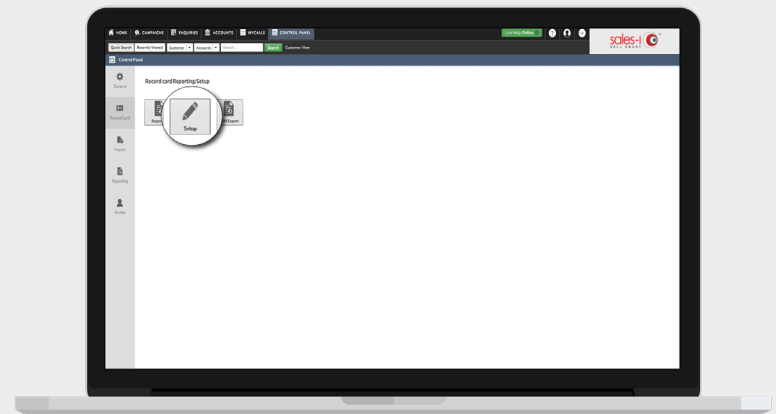
01 From the top navigation, click **Control Panel**.



02 On this new screen, select the **Record Card** option from the left-hand navigation.

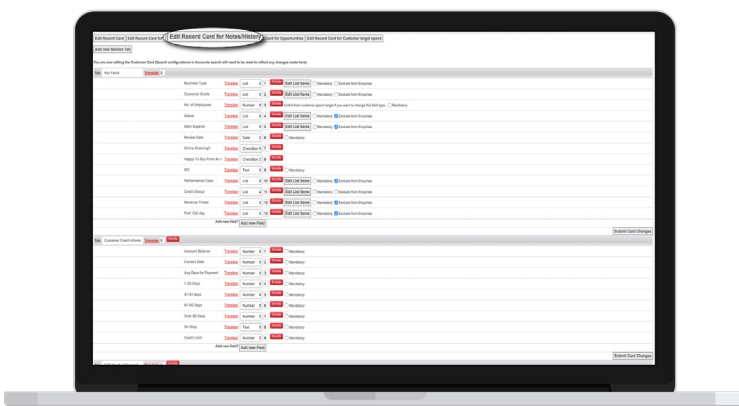


03 From these options click on the **Setup** icon.

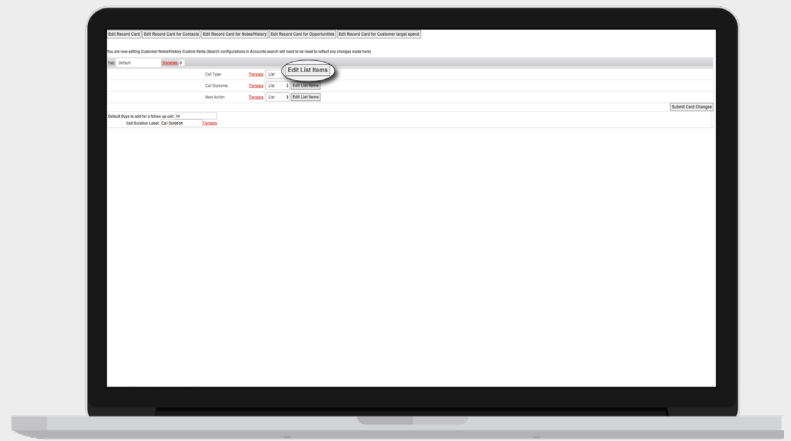


04 Use the **Edit Record Card for Notes/History** button at the top of these screen

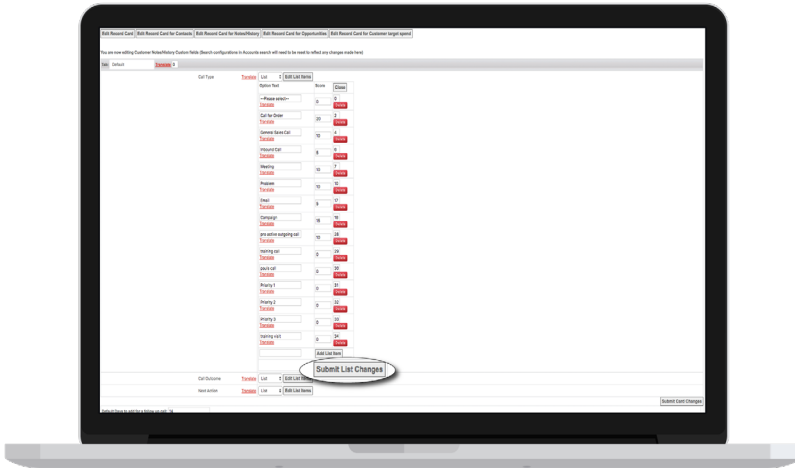
*From this screen you can edit the criteria for the various areas of the Record Card section.



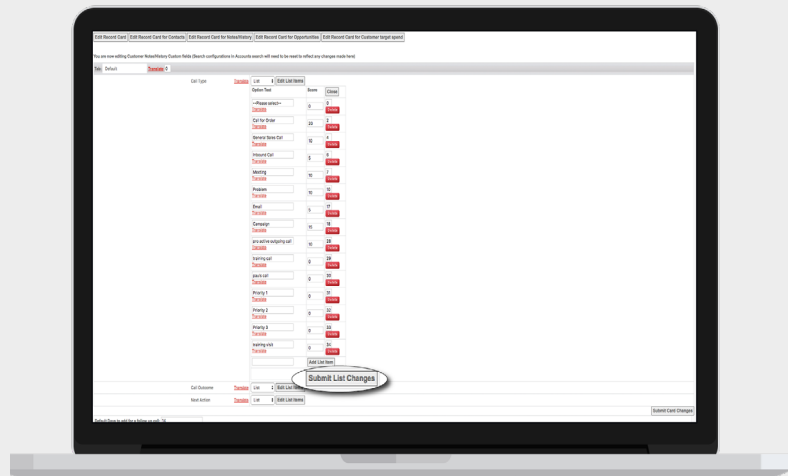
05 Three options will appear; you need to select the **Edit List Items** for the first option **Call type**.



06 Here you can enter your points-per-activity into the **Score** column based on the points you wish to allocate next to each **Call type**.



07 When you've finished entering the details click **Submit List Changes** at the bottom of the column.



08 This will take you to the previous page, this time click the **Submit Card Changes** in the bottom right corner to apply the change overall.

