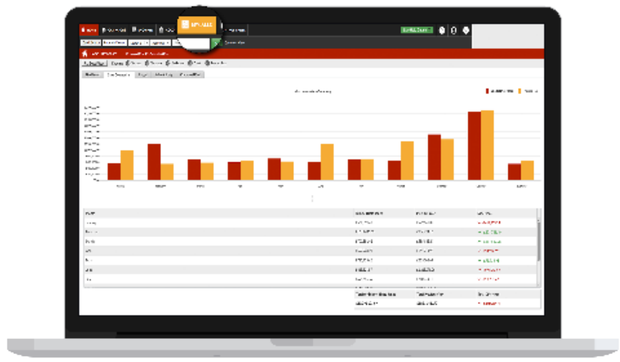
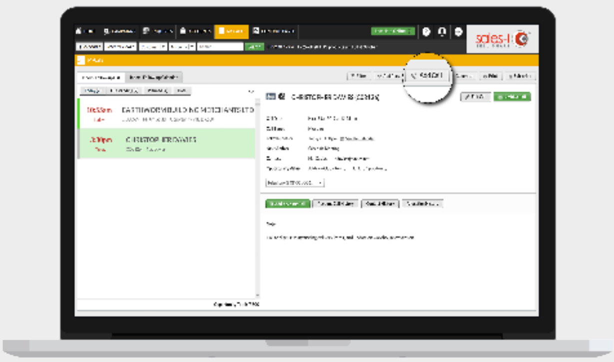
sales-i SELL SMART

GETTING STARTED WITH MYCALLS

This guide shows you how MyCalls can make customer contact more successful and easier to manage.

01 From the top navigation, click **MyCalls.**

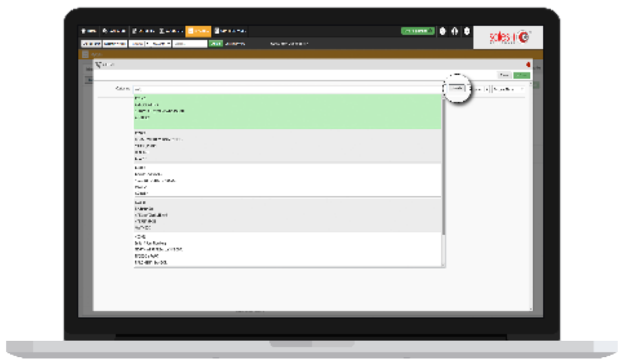


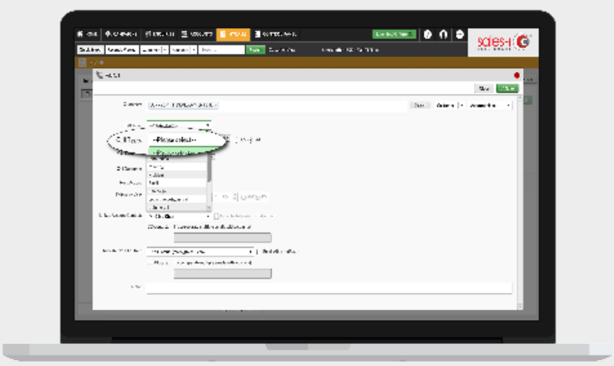


02 Click **Add Call** to search for an existing account.

*Accounts need to pre-exist prior to booking an interaction.

03 Search for your customer or prospect by full / partial account name or via the account number using the drop-down options and the search field.

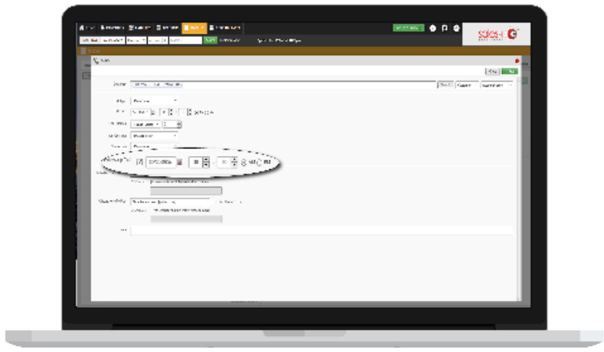


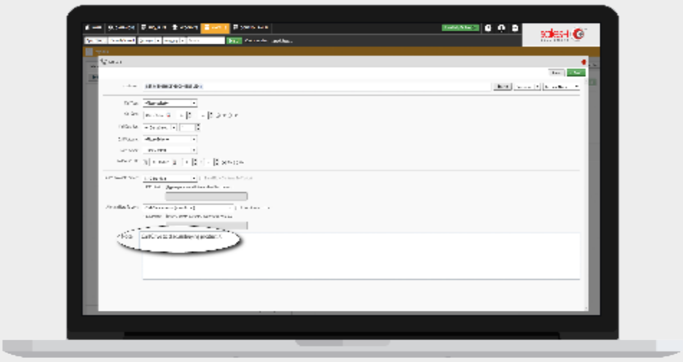


04 Use the **Call Type** drop down list to select the overview of the meeting you are going to have with this account, i.e. Account Visit, Sales Call, Meeting.

*Please note these can be customized to suit your needs by the Power User of your system.

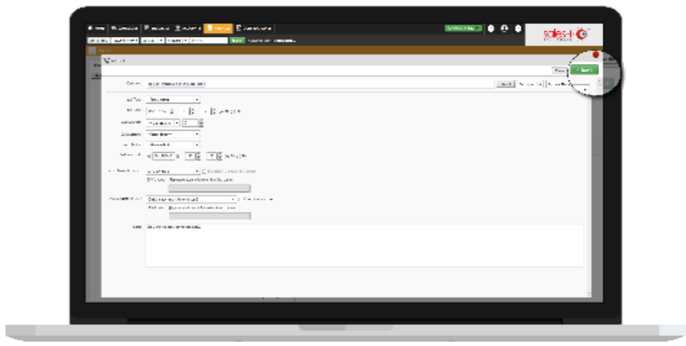
05 Use the **Follow-up call** time & date selector to drive your diary and schedule this interaction with the account, you may need to tick the box next to **Follow-up call** to enable this selector.

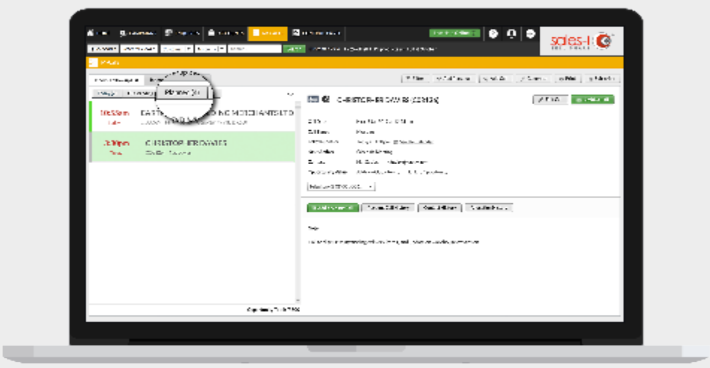




06 Add a **Note** into the mandatory note field to outline the objectives and discussion points of this interaction.

07 Back at the top right hand corner, click onto the **Save** button.





08 You can view your booked interaction in the **Inbox – Follow-up List** view, in the relevant section.

TOP TIP: SYNC YOUR CALENDER

If you haven't already, you can Sync your MyCalls calender across multiple devices: [PC](), [iOS]() or [Android.]()

0845 508 7355
support@sales-i.com
https://support.sales-i.com

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