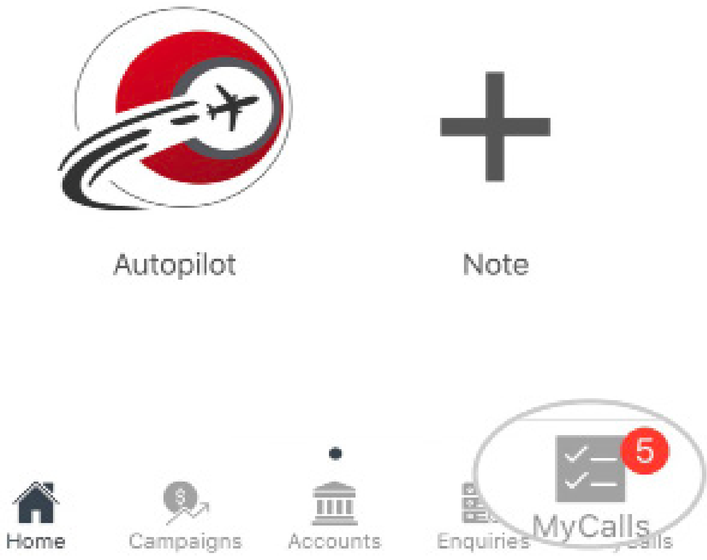
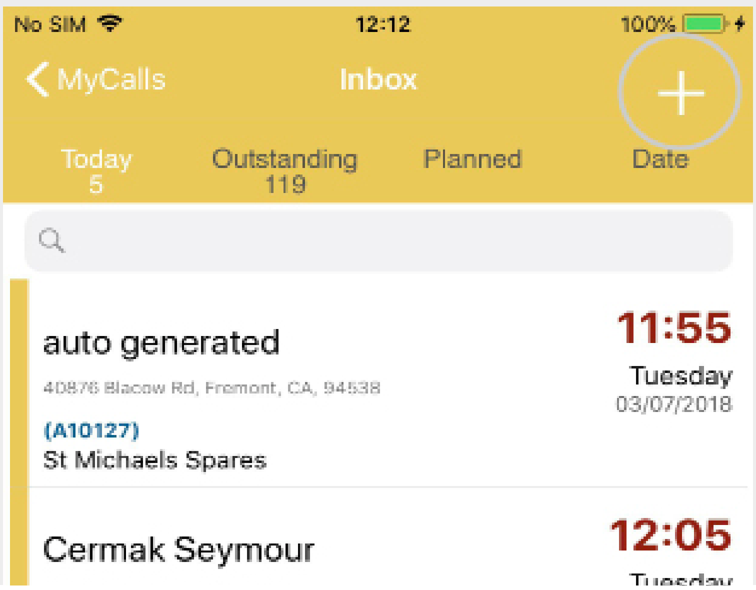
GETTING STARTED WITH MYCALLS ON YOUR APPLE DEVICE

Using MyCalls on your sales-i Apple app allows you to plan your appointments whilst on the move. It enables you to spend less time on pre-call prep and post-call follow up, meaning you have more time to spend on selling!

01 From the bottom navigation menu, tap **MyCalls**.

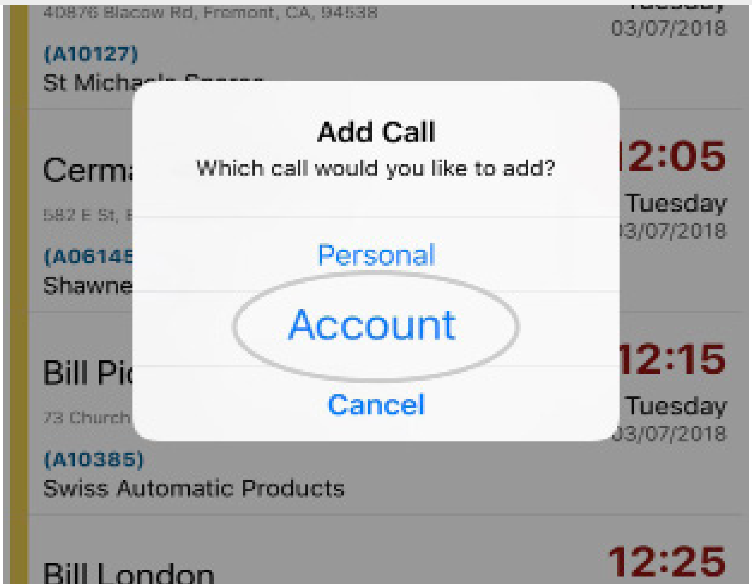




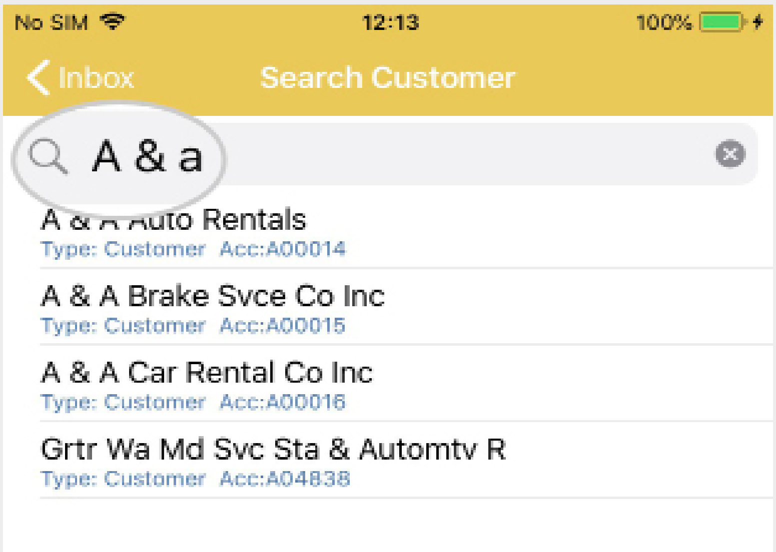
02 Tap the + at the top of the screen.

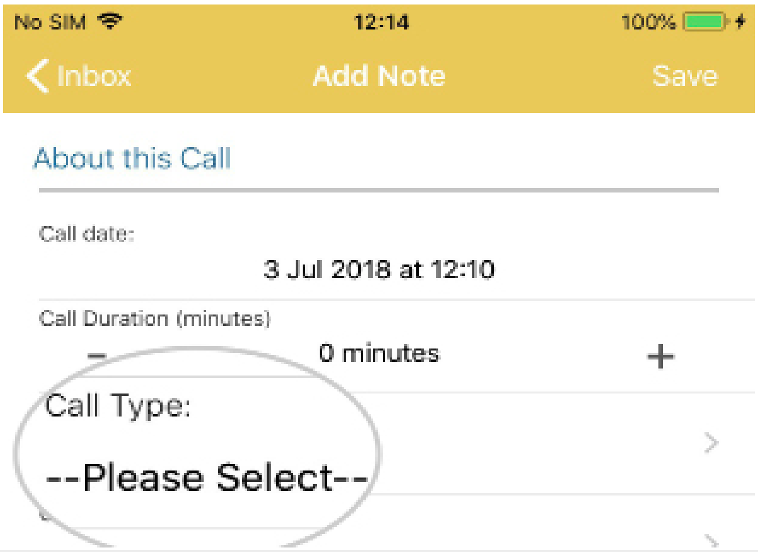
03 Tap **Account** to search for an existing account.

*Accounts need to pre-exist prior to booking an interaction.
Search for your customer or prospect by full / partial account name or via the account number.



04 Search for your customer or prospect by full / partial account name or via the account number.

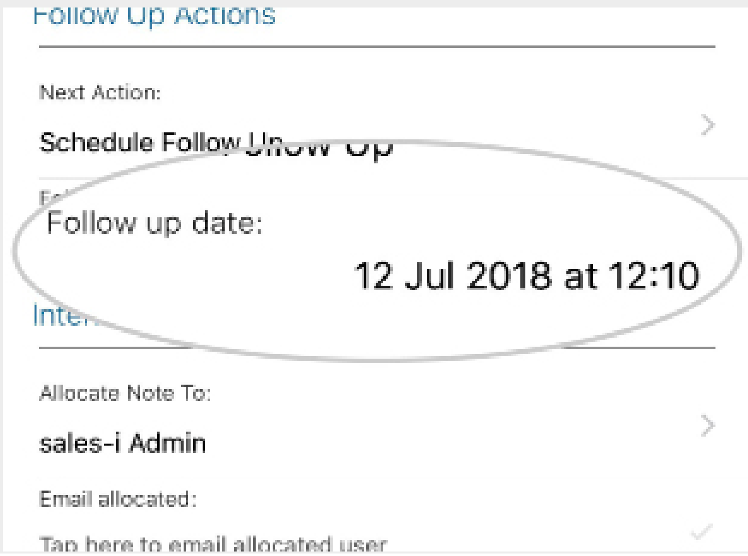


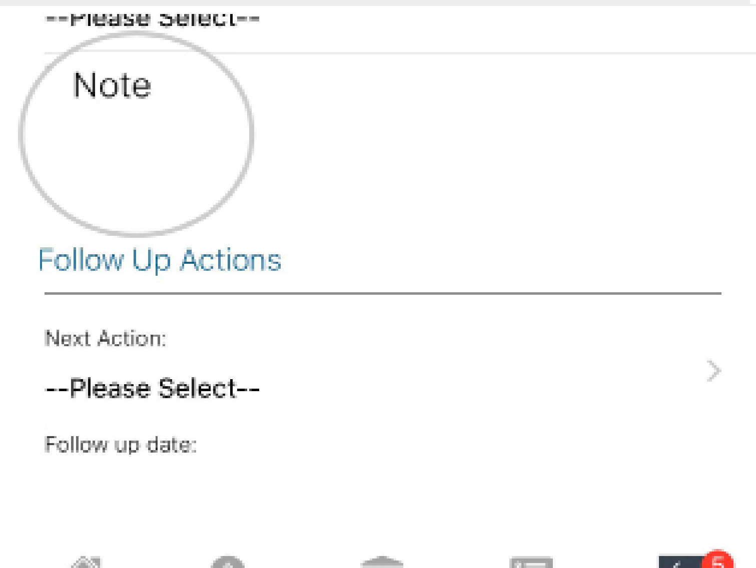


05 Use the **Call Type** drop down list to select the overview of the meeting you are going to have with this account, i.e. Account Visit, Sales Call, Meeting.

*__Please note:__ These can be customized to suit your needs by the Power User of your system.

06 You will now need to tap the Follow-up call time & date selector box to schedule the next interaction with this account.

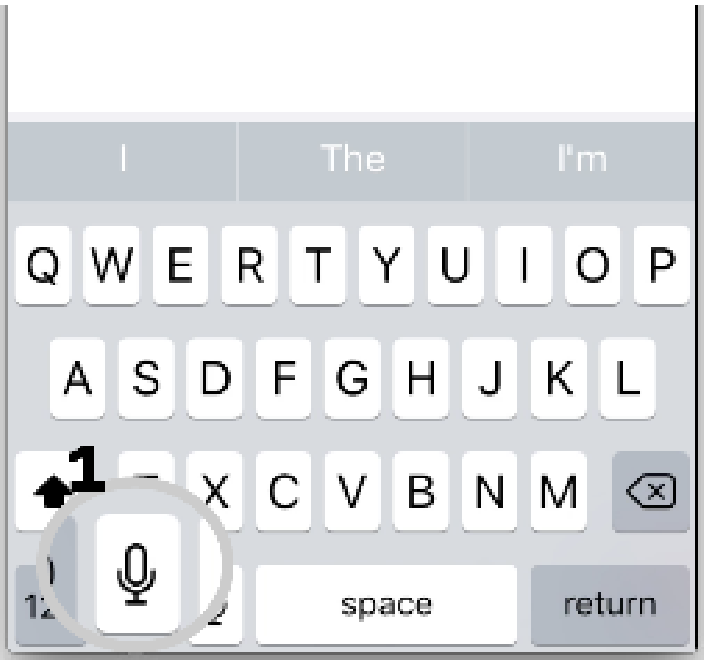


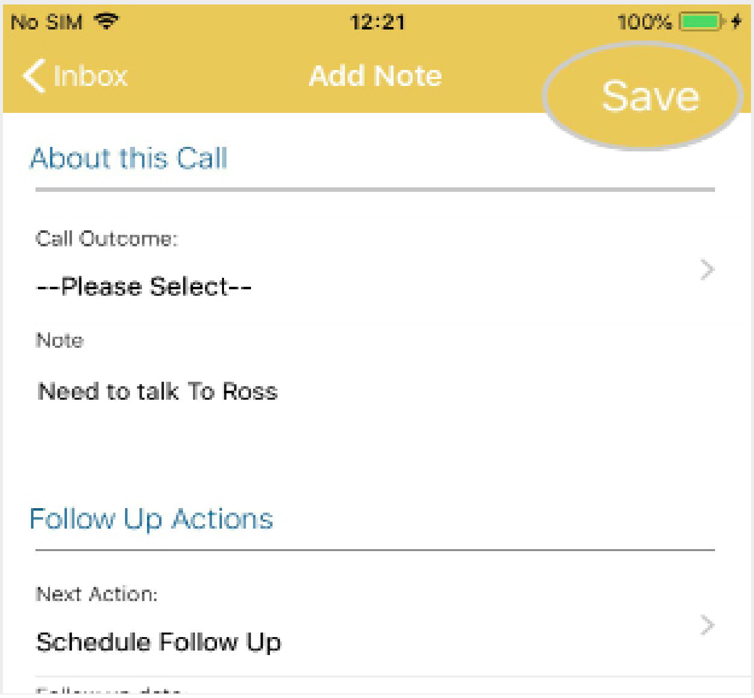


07 Tap **Note.**

08 You can now type your details or alternatively, tap the mic icon to dictate your notes using Siri.

When you're done, tap the save icon in the top right corner to save the text.





09 When you are ready, tap **Save** the top right hand corner to save.

10 Tap **Planned** in the Inbox menu to view your booked interactions. You can also view your planned calls as a Calendar View to see calls on a specific date.