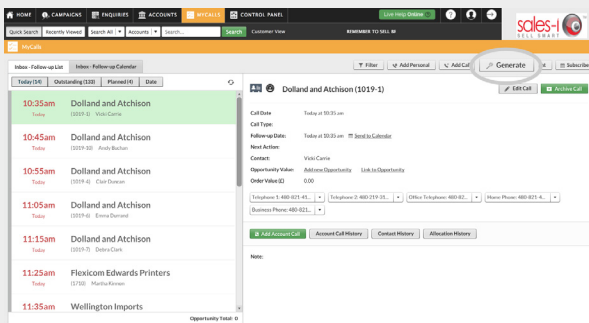
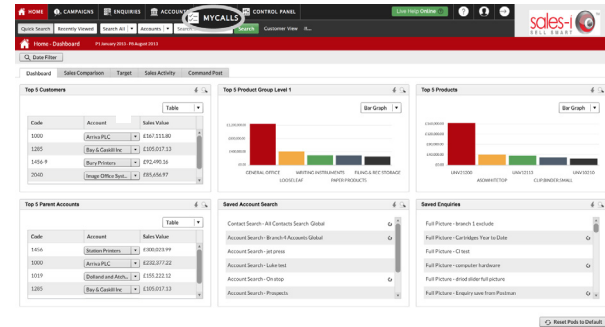


# HOW TO DISCOVER WHICH CUSTOMERS YOU HAVEN'T SPOKEN TO IN THE LAST 2 MONTHS - DESKTOP

Let sales-i fill in your diary for you. At the click of a few buttons you can discover customers you haven't contacted in a while and send details of them to your diary. Say goodbye to admin and hello to having more selling time.

**01** From the black navigation bar at the top of the screen, click **MyCalls**.



**02** Next, click **Generate**.

**03** You will now see a list of options which will help you decide which calls you wish to generate:

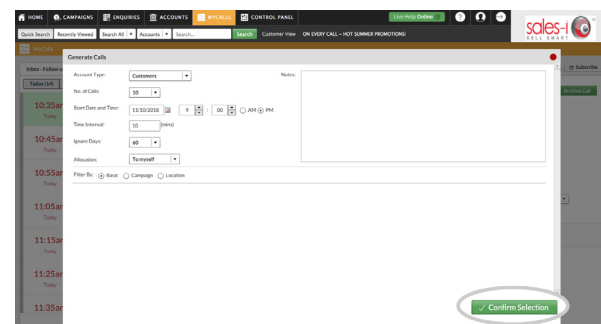
**Account Type** = Select Customers or Prospects.

**No. of Calls** = Select the amount of calls you want to make.

**Start Date and Time** = Select what day and time you would like to start making these calls.

**Time Interval** = How often do you want to make these calls.

**Ignore Days** = refers to the number of days since your last point of contact with an account. Selecting 60 days will exclude/ignore anyone who has been contacted in the last 60 days.



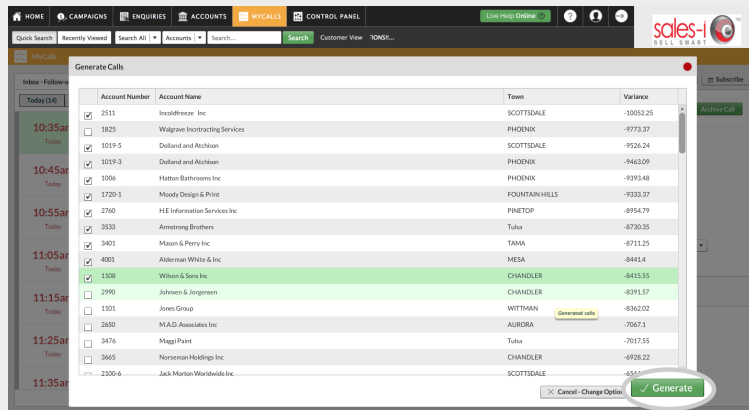
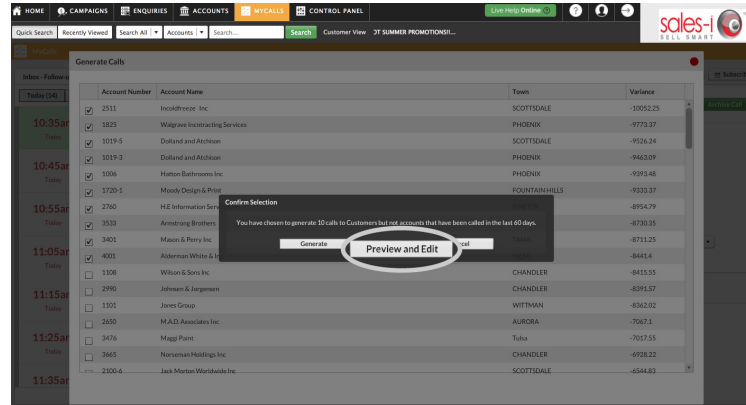
We want to contact 10 customers who we have not spoken to in the last 60 days and we want to put them into our diary so that we start contacting them from gam tomorrow, every 10 minutes. Finally, click the green **Confirm Selection** button.

# 04

You will now see a message which asks you whether you wish to **Generate** or **Preview and Edit**.

It is a good idea to **Preview and Edit** these calls to check if there is anyone you wish to include or exclude from the initial list.

Click **Preview and Edit**.



# 05

You will now see a preview of your results.

They are in order of the accounts who have had the biggest decrease in spend (year on year).

You can **untick** any who you don't want to contact.

Once you are happy with your selection, click the green **Generate** button.

# 06

You will now see a message informing you that calls were generated successfully.

Click **OK**.

Your list of customers you haven't spoken to in the last 2 months has been created and sent to your diary.

To see them click either **Today** (to see calls scheduled for today) or **Planned** (to see calls you have scheduled for the future).

