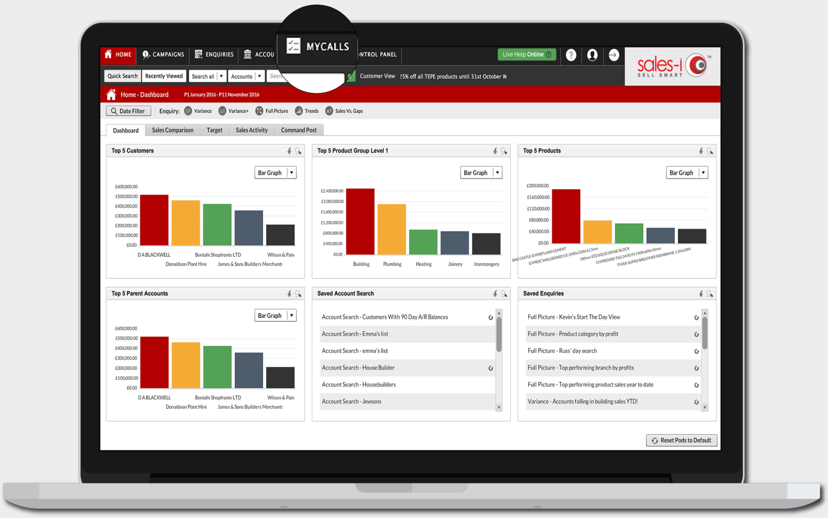
sales-i™ SELL SMART

HOW TO SCHEDULE A FOLLOW UP CALL

The guide below details how to schedule a follow up call.

01

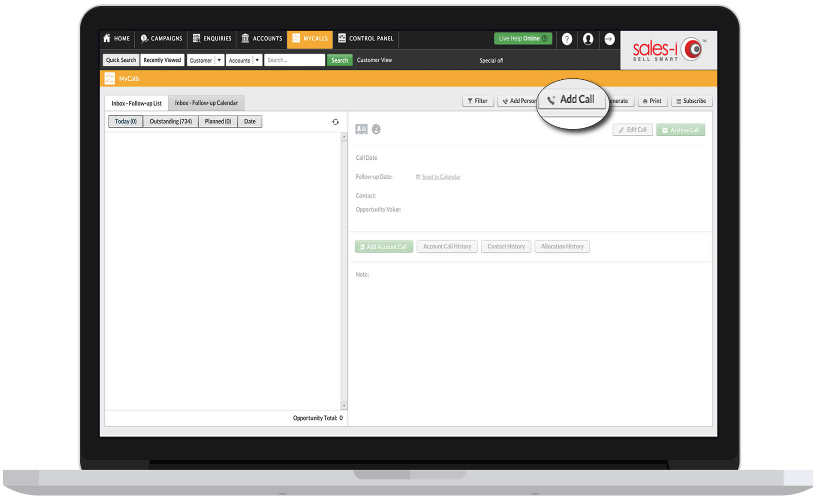
From the top navigation, click **MyCalls**.



02

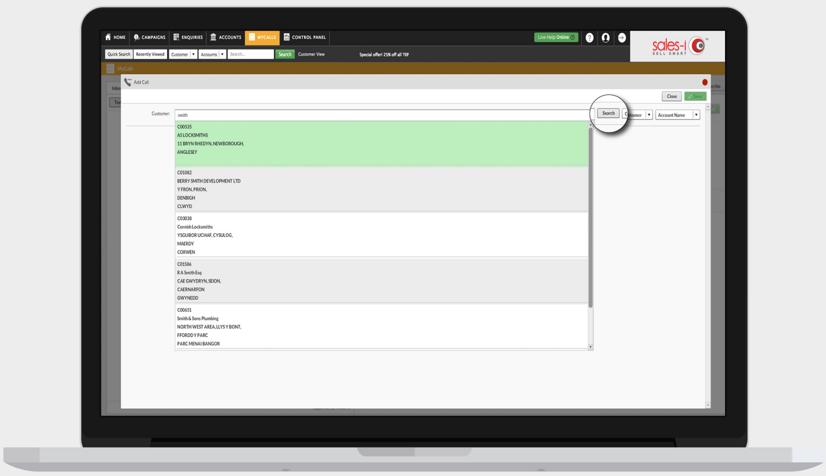
Click **Add Call** to search for an existing account.

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

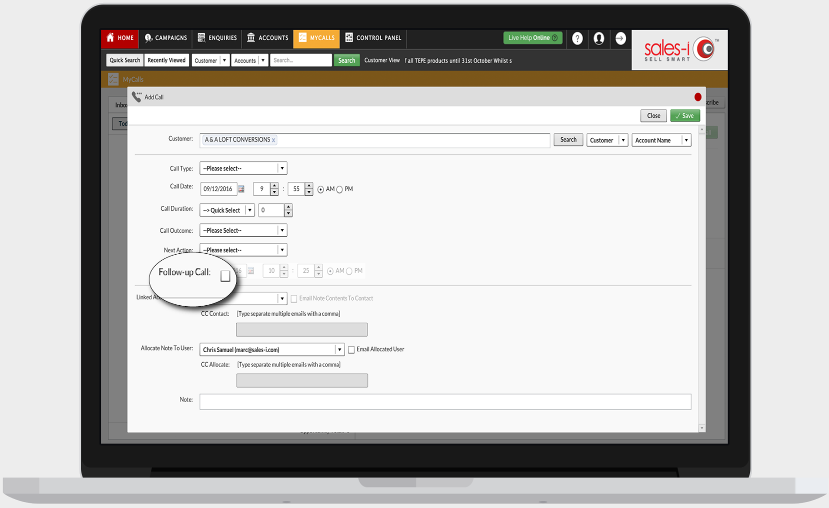


03

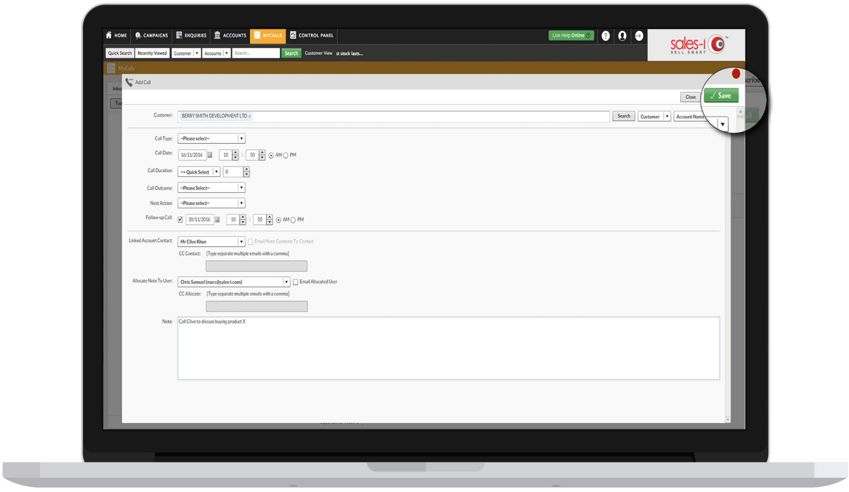
Search for your customer or prospect by typing the full / partial account name or via the account number using the drop-down options and the search field and then click **Search**.



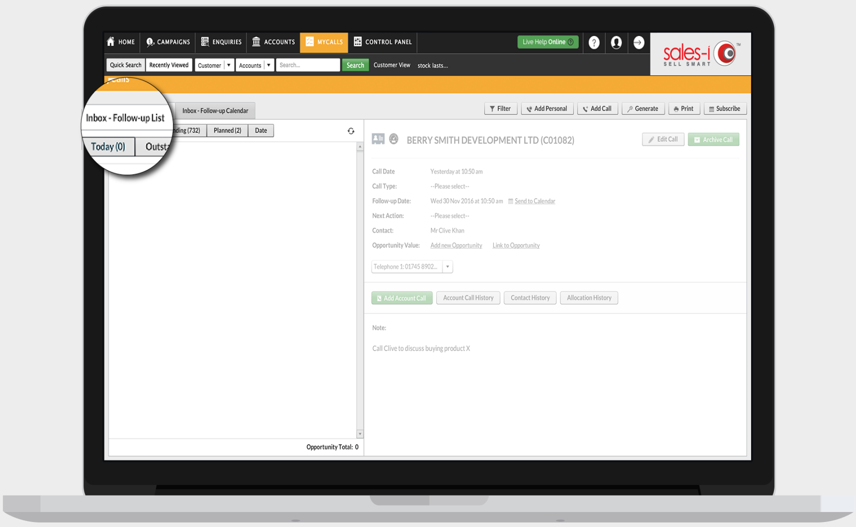
04 You will now need to tick the **Follow-up Call** time & date selector box to drive your diary and schedule the next interaction with the account.



05 Complete any other notes relating to this call and when you are ready, click onto the **Save** button in the top right hand corner.



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



OPTIONAL

Our Microsoft Exchange/Office 365 integration tool allows you to seamlessly update both your sales-i and Exchange accounts at once. It has been designed to allow contacts, emails and appointments to be viewable and editable within both your Microsoft Exchange/Office 365 email client and sales-i.

For more information on this service visit **http://www.sales-i.com/explore/overview/email-integration**