

# HOW TO ADD FUTURE APPOINTMENTS TO YOUR MYCALLS DIARY - APPLE

This guide will show you how to use the follow up date to plan future appointments into your MyCalls diary. Planning your future appointments allows you to make the best use of your time and is integral for other features of the sales-i app (e.g. Autopilot and Maps).

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



Autopilot

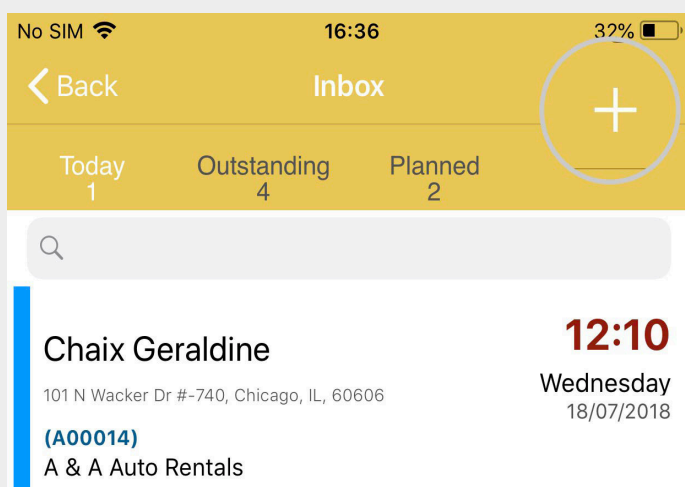


Note



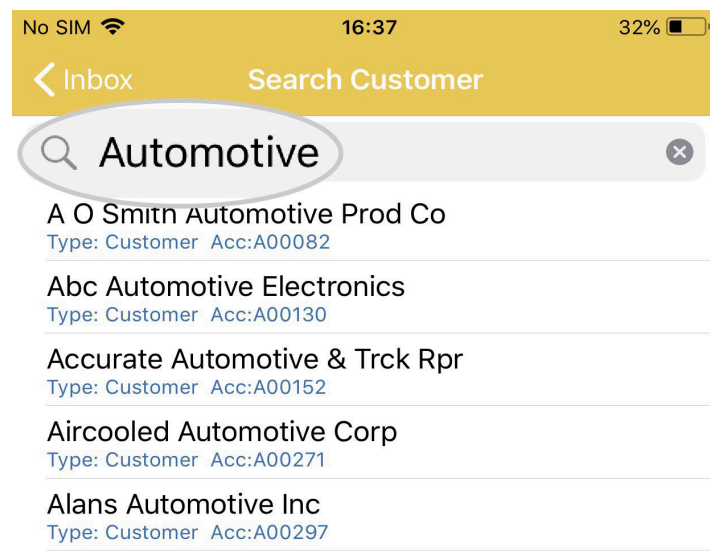
**02** Tap the + at the top of the screen, then tap **Account** to search for an account.

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



**03** Search for your Customer or Prospect by typing the (full or partial) account name or number.

Then, select the desired Account from the results list.



## Follow Up Actions

Next Action:

--Please Select--

Follow up date:

Internal

Allocate Note To:



Home



Campaigns



Accounts



Enquiries

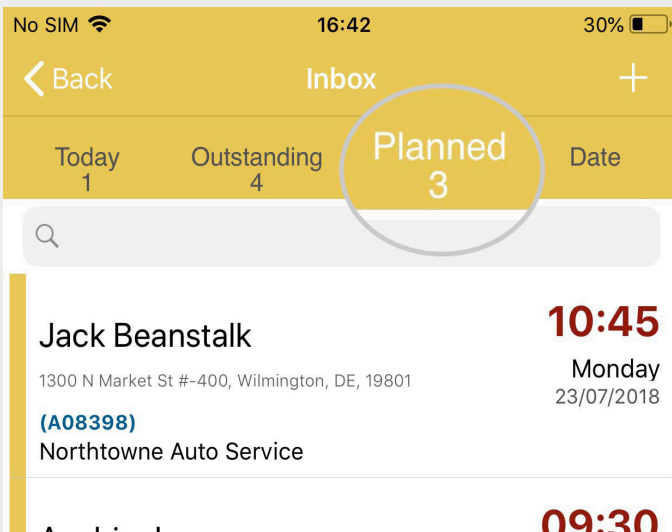
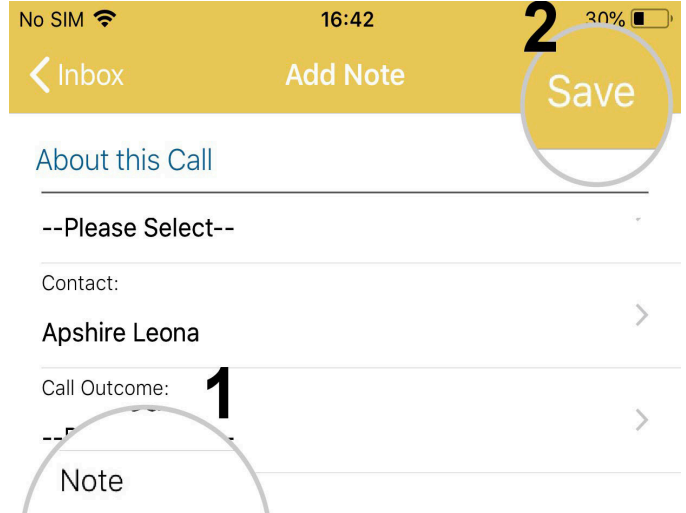


MyCalls

**04** Tap the **Follow-up Date** time & date selector box to schedule your next interaction with the account.

**05** Complete any other notes relating to this call (i.e. Future action/talking points).

When you are ready, tap **Save** in the top right hand corner.



**06** Tap **Planned** in the Inbox menu to view your future appointments.

Alternatively, tap **MyCalls** in the top left hand corner and then **Calendar (Active Calls)** to view your planned calls on a specific date.

**07** 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>

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## Move Calls

**BERRY SMITH DEVELOPMENT LTD** 09:25  
sales-i auto generated call - from campaign 'Customer who bought cement BNB sand in the last 3 months (Rolling and...

**DARYL INDUSTRIES LTD** 15:30  
Called to speak about promotion on Product X. Wants a demo on Products X, Y & Z. Product demo arranged with c...