

Thursday, 15 March 2018 at 09:45

Wednesday, 14 March 2018 at 09:40

Tuesday, 13 March 2018 at 14:55

MyCalls

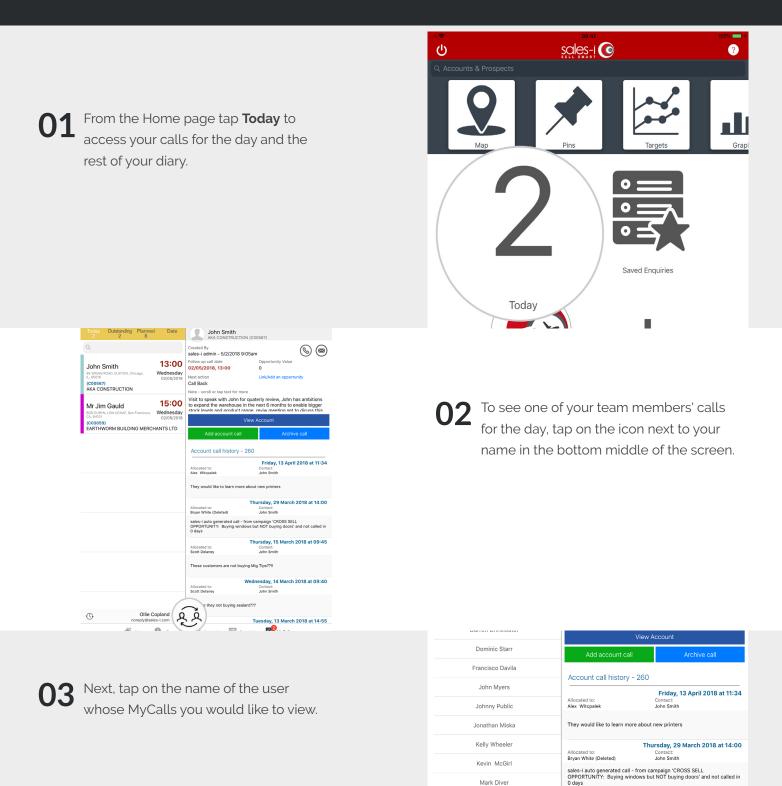
Contact: John Smith

Contact: John Smith

Enquiries

## HOW TO... SEE AND EDIT YOUR TEAM MEMBERS' MYCALLS

Power Users are now able to access and edit their team members' MyCalls on their Apple devices. helping them manage and keep visabilty whilst out on the road.



Martese Luckett

Mary Ellen DiTommaso

Mary Ellen Sales User

Nathan Israileff

Ollie Copland

Rachel Challis

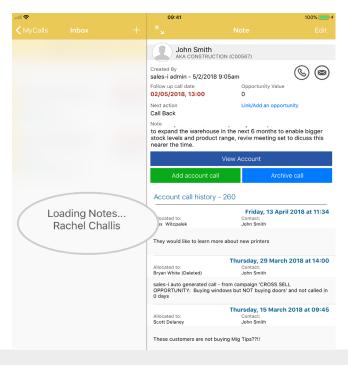
Allocated to: Scott Delaney

Allocated to: Scott Delaney

Accounts

These customers are not buying Mig Tips??!!

Why are they not buying sealant???



You will now see a **Loading Notes** screen whilst your requested team members' MyCalls section loads.

**5** Once loaded, you will see your requested team members' MyCalls.

You can view, edit, rearrange and archive these calls just as you would if they were your own calls.

Please note: You will continue to see your team members' calls until you select to see your own once more.

To return to your call list for the day, follow steps 2 to 4 once more but select your own name at step 3.

ul 🌫		09:41		100% 📃
Today Outstanding Planned Date 2 154 60		Miss Patricia Buchan KAFFTEN LIMITED (C00720)		
Q		Created By		B
Miss Patricia Buchan PROSPECT HOUSE, GEORGE STREET, Charge, IL, 60018 (C00720) KAFFTEN LIMITED	09:35 Wednesday 02/05/2018	Rachel Challis - 2/21 Follow up call date 02/05/2018, 09:35 Next action	Opportunity Val	
		Note set		
GARETH SIMPSON	15:35	sales-i auto generated call - from campaign 'Customers Who Bought Cement, But Not Blocks (YTD)' and not called in 0 days		
YSGOLDY, COEDANA, Los Angeles, CA, 90001 (C00482) APEX DEVELOPMENTS	Wednesday 02/05/0	View Account		
		Add account call	Archiv	e call
		Account call hist	ory - /	
		Allocated to: Rachel Challis	Sunday, 6 N Contact: Miss Patricia Buc	1ay 2018 at 15:3 <sub>han</sub>
	Customer wants demo on AB&C			
		Allocated to: Rachel Challis	Wednesday, 17 Janua Contact: Miss Patricia Buc	-
		sales-i auto generated call - from campaign 'Customers Who Bought Cement, But Not Blocks (YTD)' and not called in 0 days		
		Allocated to: sales-i admin	Wednesday, 17 Janua Contact: Miss Patricia Buc	-
		sales-i auto generateo Cement, But Not Bloci	I call - from campaign 'Custom	

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Don't forget to visit our support site online to view sales-i how to's, tips, tricks and best practices.

## https://support.sales-i.com