

SalesPartner Training Poster:

Follow up Phone Calls

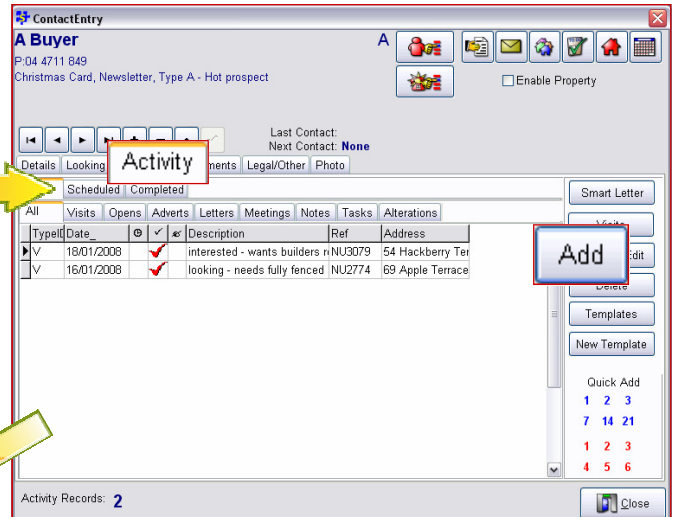
Follow up phone calls:

In SalesPartner, you can setup activity records with repeat cycles. These activities will show up on your To Do list, prompting you to follow up your clients.

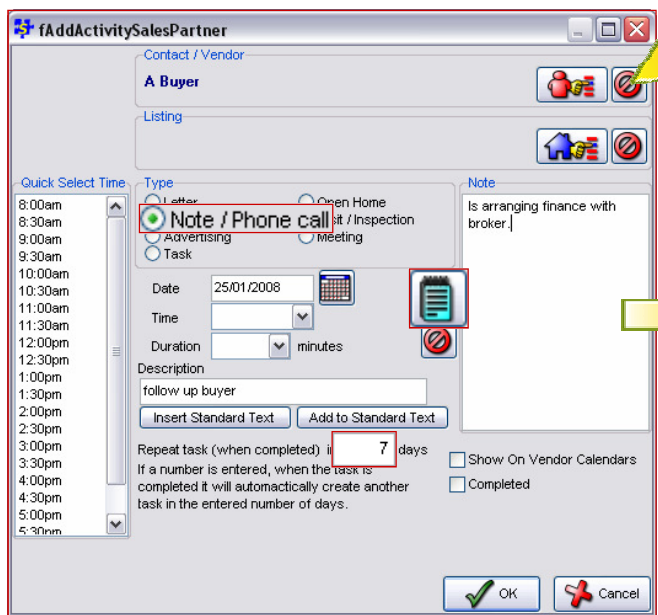
Method



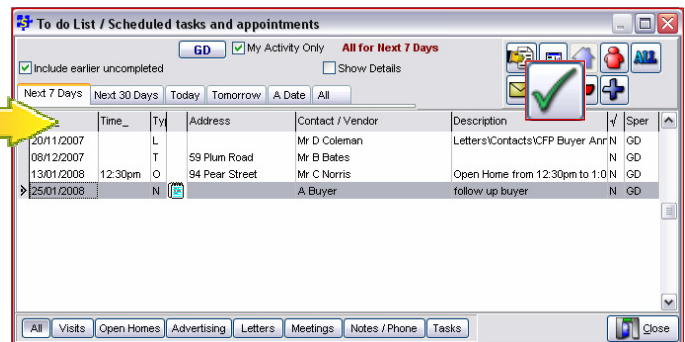
Start in Contact Entry



In the Activity Tab, Add Activity



Set the Activity as a Phone Call, enter a description and set the Repeat cycle. (We recommend this is set to at least 7 days, even if you call the contact more often than this, to avoid clogging up your database)



The Activity will show up in the To Do List, here you double-click to Edit the activity, or use the Tick button to set the Activity Completed.

If you highlight a few of these activities in the To Do list you can then go to Print Reports and print a contact list for when you call these clients.

A more detailed guide for this process is available in the SalesPartner Intermediate Course. This booklet is available for download from www.salespartner.co.nz/books or alternatively you can contact SalesPartner for more information and training materials. You can also create rolling picture shows of sales. Ring SalesPartner for more information.