



Mod 301: Sales Training (Full Version/Desking)

3a. Create an Appointment:

You can create an appointment that is not associated with a customer from the New Bar in the upper left hand corner of your screen. You can create appointments that are associated with a customer in numerous places in the system as well. See the bottom of this module for instructions on where you can create appointments that are associated with a customer.

- In the Appointment Edit box the items in red are required.
- The following items are optional:
- **Subject Line:** The Subject line is a brief description of the Appointment.
- **Start Time:** Type the date of the appointment or use the calendar icon to the right to choose a date.
 - Select the Start time from the drop down menu.
 - Select the end time from the drop down menu. (*estimate end time usually 1 ½ to 2 hours*)
- The following items are optional:
 - **Location:** If the appointment is to take place outside the dealership you can use the location line to fill in the alternative address.
 - **Category:** You may select the category from the drop down box.
 - **Client:** You can Add a Client to this appointment if one is not already chosen by clicking on the search icon to right of the client heading and searching for your client.
 - After clicking on this search icon you will see a “Find a Client” Pop-Up box appear.
 - Type in your search criteria and click search.
 - When the list appears click return next to the client you would like to add to the appointment.
 - **Reminder:** If there is a client associated with the appointment you will have the option to send an email reminder to the customer if one has been set up for your dealership.
 - **Employees:** To add one or more employees to the appointment, click the search icon next to the employee heading.
 - In the Select Employees Pop-Up box click on the name of the employee you would like to add.
 - Click on the green arrow pointing to the right, this will move the employee name to the Chosen Employee box.
 - You can add as many employees as you chose.
 - Click Save and Close.
 - **Notes:** if you would like to fill in additional comments about the appointment do so in the notes section.
 - **Save and Close:** Once you are done filling out the information in the appointment edit box click Save and Close.

3b. Create a Task:

A task is something that can be added to your to do list today or for future customer follow-up. You can create a Task that is not associated with a customer from the New Bar in the upper left hand corner of your screen. You can create tasks that are associated with a customer in numerous places in the system as well. See the bottom of this module for instructions on where you can create tasks that are associated with a customer.

- In the Task Edit box the items in red are required.
- There are two types of tasks you can create: **Standard** and **Advanced**.
- **Standard Tasks** start showing in your task list today.
- **Advanced Tasks** allow you to choose a future date you would like your task to appear in the task list.

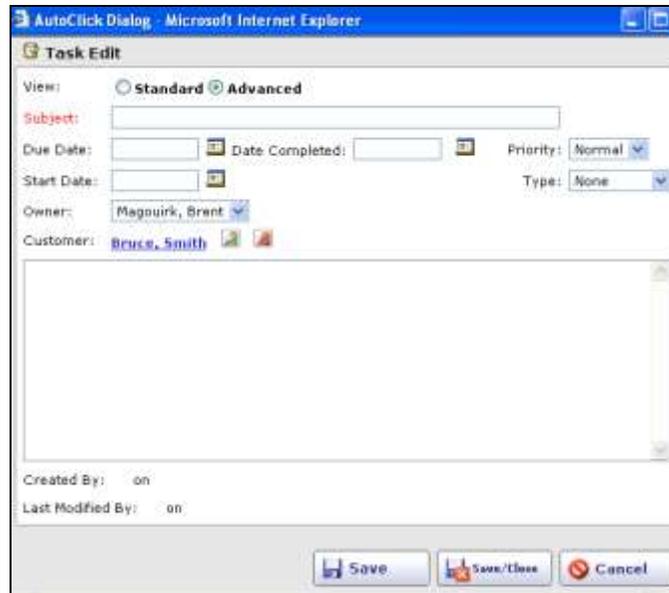
To create a Standard Task

- **Subject:** Enter a subject for the task, which is a brief definition of the task and will show up on your task menu.
- **Due Date:** Fill in the due date or use the calendar icon to the right to choose your date. If your task is not completed by the end of the due date it will show up in red letting you know it is overdue.
- You do not need to enter in a start date because Standard tasks will be displayed on your to do list today.
- **Priority:** This will set the urgency of the task and will be displayed on your task list. An exclamation will indicate a high priority and a downward arrow will indicate a low priority.
- **Type:** Choose the type of task from the drop down menu.
- **Owner:** If you would like to assign this to someone else in the dealership select them from the drop down menu. The will place the task on the task list of the employee you have chosen.
- **Customer:** You can Add a Customer to this task if one is not already chosen by clicking on the search icon to right of the Customer heading and searching for your client.
 - After clicking on this search icon you will see a “Find a Client” Pop-Up box appear.
 - Type in your search criteria and click search.

- When the list appears click return next to the client you would like to add to the task.
- **Notes:** Fill in any additional comments about the task in the space provided.
- **Save and Close:** Once you are done filling out the information in the task edit box click Save and Close.

To create an Advanced Task:

- Select the Advanced radio button to the right of view
- **Subject:** Enter a subject for the task, which is a brief definition of the task and will show up on your task menu.
- **Due Date:** Fill in the due date or use the calendar icon to the right to choose your date. If your task is not completed by the end of the due date it will show up in red letting you know it is overdue.
- **Start Date:** Enter in a Start Date when you would like the task to appear in your to do list.
- **Complete Date:** Leave this box empty. Once the task has been marked completed the system will automatically put the date into this field.
- **Priority:** This will set the urgency of the task and will be displayed on your task list. An exclamation will indicate a high priority and a downward arrow will indicate a low priority.
- **Type:** Choose the type of task from the drop down menu.
- **Owner:** If you would like to assign this to someone else in the dealership select them from the drop down menu. The will place the task on the task list of the employee you have chosen.
- **Customer:** You can Add a Customer to this task if one is not already chosen by clicking on the search icon to right of the Customer heading and searching for your client.
 - After clicking on this search icon you will see a “Find a Client” Pop-Up box appear.
 - Type in your search criteria and click search.
 - When the list appears click return next to the client you would like to add to the task.
- **Notes:** Fill in any additional comments about the task in the space provided.
- **Save and Close:** Once you are done filling out the information in the task edit box click Save and Close.



3c. Creating Tasks and Appointments that are linked with a Client:

You can create Tasks and Appointments that are automatically linked with a customer in numerous places in the system.

- **Customer Pop-up Screen:**
 - Click on the down arrow to the left of the Clients name under the Pipeline Summary.
 - You will now see the Customer Pop-Up window.
 - To create a task or an appointment in the Pop-up window.
 - Click on Action => New and select either Task or Appointment.

- **Quick Links:**
 - On the right hand side of the Sales Pipeline are quick links that also allow you to create Tasks and Appointments.
 - Create a Task by clicking on the Task icon 
 - Create an Appointment by clicking on the Appointment icon 
 - Remember these are linked directly to the Customer

- **Client Information Screen:**
 - Click on the Customers Name.
 - Click on the Actions menu **Actions**  in the top right hand corner of the screen
 - And either select New Task or New Appointment from the drop down menu.

- **Phone Comment Box:**
 - You can also create a Task or Appointment in the Call Log Window.
 - Click on the customers phone number
 - You will see a Record a Phone call Pop-up box.
 - Enter your phone comments.
 - Choose your method of follow-up by either clicking on Schedule an Appointment or Create a Task. *Note: As a third method of follow-up you also have the option of sending an email see Module 101.*
 - Next click on Save and Close to save the phone comment and open up the Task or Appointment box.

Remember: If you would like to create a Task or an Appointment that is not associated with a specific Client use the icons on the New Bar in the top left hand corner of your screen.

3d. Appointments on the Dashboard:

You will see your daily appointments and your next four days of appointments on you Dashboard. You will see the subject of the Appointment, the Customers Name and the Client Pop-up link.

- You can Edit your Appointment by clicking on the pencil icon  next to the subject of the Appointment.
- If the Customer attends the appointment you can mark it “Appointment Kept” by single clicking in the box to the left of the appointment time.

APPOINTMENTS		
▲ 12/27/2006		
<input type="checkbox"/>	2:00 PM - 4:00 PM	 Coming into purchase Z3484 Weaver, Bob
▲ 12/29/2006		
<input type="checkbox"/>	2:00 PM - 2:30 PM	 Customer Appointment Thompson, Sylvester
▲ 12/30/2006		
<input type="checkbox"/>	10:00 AM - 11:30 AM	 looking for 07 Truck Bird, Dortha

3e. Tasks on the Dashboard:

You can find your daily tasks that have not been completed located on your Home Page. They will be ordered by Priority and will include the description of tasks, the clients name and the Customer Pop-up link. *Note: Task maybe set-up for you to go off Automatically.*

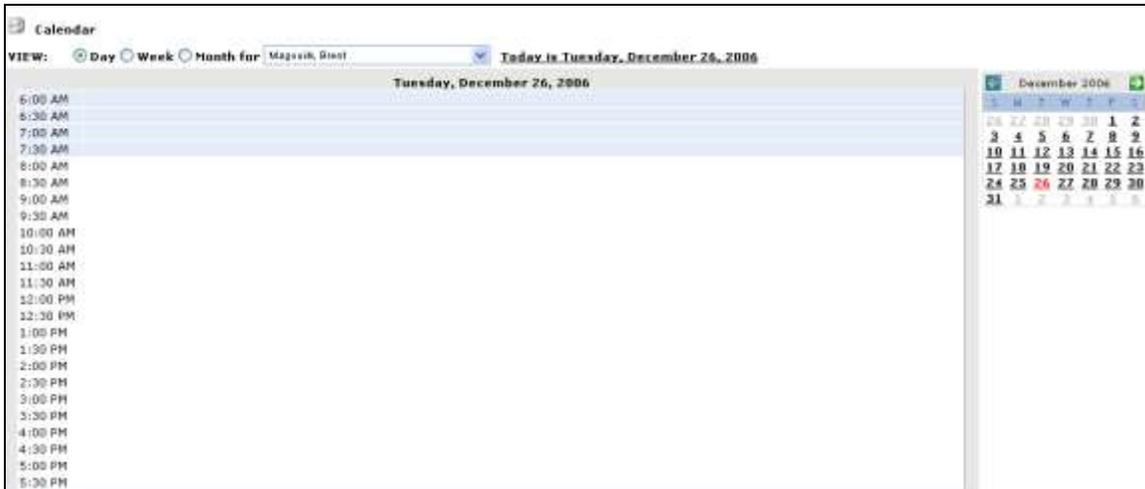
- To Edit a task click on the pencil icon  to the far left of the task.
- To mark a task complete single click in the box to the right of the pencil. Marking the task complete will also remove it from your tasks list on your Dashboard.
- If you do not mark your task complete by the end of the due date, the task will show in red indicating the task is overdue.

TASKS		
View: <input checked="" type="radio"/> Incomplete <input type="radio"/> All of My <input type="radio"/> Due Today and Overdue		
for Magouik, Brent		
	Description	Client
	<input type="checkbox"/>  Call Samuel to reschedule appointment	Samuel, Unioner
	<input type="checkbox"/> Make 1 Day Unsold Follow Up Phone Call	Weaver, Stella
	<input type="checkbox"/> Make 1 Day Unsold Follow Up Phone Call	Tabby, Samantha
	<input type="checkbox"/> Need Bank info	Whitzel, Donna
	<input type="checkbox"/> ↓ Let Ralph know when we get in a 2005 Cherokee	Mouse, Ralph
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3f. Viewing Appointments on the Navigate Bar:

You can view all your appointments, past and present from the Planner section on the Navigate Bar.

- Click on Planner in the Navigate Bar
- The planner is defaulted to show you today's appointments.
- You can choose how you want to view your appointment schedule by clicking on the radio button at the top of the calendar.
 - You can view by day, week or month
- The smaller calendar on the right hand side will allow you to see any calendar date, past, present or future.
 - To choose the previous month click on the green arrow to the left of the current month.
 - To choose a future month click on the green arrow to the right of the current month.
 - To choose a specific day click on that day.



3g. Viewing Tasks on the Navigate Bar:

You can view all your tasks, completed or incomplete from the Tasks section on the Navigate Bar.

- Click on Task in the navigate bar.
 - The task list will be defaulted to display a list of your incomplete tasks.
 - If you would like to see all of your tasks select the radio button next to "All of My" at the top of your page.
 - The page can be ordered by column headings.
 - On the far left hand side of your screen you can edit your task, by clicking on the pencil icon .
 - The next column allows you to delete your task by clicking on the X icon .
 - The third column marks whether it is a complete or incomplete task  - If the box is checked it is marked as a completed task.
 - If the box is not checked it is marked as an incomplete tasks
- If you would like to mark the task as incomplete click on the checkmark to remove it.

- Removing the checkmark and showing the task as incomplete will make your task active again and will be displayed as incomplete in your task list on your Home page.
- If you would like to mark the tasks as completed click in the box to checkmark it completed.
 - Adding the checkmark and showing the task as completed will remove your task from your Homepage.

Tasks						
View: <input type="radio"/> Incomplete <input checked="" type="radio"/> All of My <input type="radio"/> Due Today and Overdue for Maguire, Brent						
		Description	Due Date	Client	Type	Created By
	<input checked="" type="checkbox"/>	Call Liddy's Banker today		Johnson, Liddy	Phone Call	Maguire, Brent
	<input checked="" type="checkbox"/>	CALL RASHED TODAY		Shaw, Rachid	Phone Call	Maguire, Brent
	<input checked="" type="checkbox"/>	90 Day Followup	2/5/2004		Phone Call	Maguire, Brent
	<input checked="" type="checkbox"/>	Get With Bob	10/27/2004	Thomas, Bob	Phone Call	Maguire, Brent
	<input checked="" type="checkbox"/>	Call Mark	7/19/2005	Palmer, Canyon	Phone Call	Maguire, Brent
	<input checked="" type="checkbox"/>	Call Mark	12/10/2005	Egg, Mark	Phone Call	Maguire, Brent
	<input checked="" type="checkbox"/>	GET WITH BRUCE TODAY	12/13/2005	Smith, Bruce	None	Maguire, Brent
	<input checked="" type="checkbox"/>	Call on jobs	12/15/2006	Wasser, Rob	None	Maguire, Brent
	<input checked="" type="checkbox"/>	Text Text		Jones, Robert	None	Maguire, Brent
	<input checked="" type="checkbox"/>	Make 1 Day Unsold Follow Up Phone Call	2/5/2004	Jones, Bob	Phone Call	SYSTEM
	<input checked="" type="checkbox"/>	Send 1 Day Unsold Follow Up Letter	2/6/2004		None	SYSTEM
	<input checked="" type="checkbox"/>	Make 1 Day Unsold Follow Up Phone Call	2/6/2004	Thomas, Bob	Phone Call	SYSTEM
	<input checked="" type="checkbox"/>	Send 1 Day Unsold Follow Up Letter	2/7/2004	Simms, Sara	Letter	SYSTEM
	<input checked="" type="checkbox"/>	Make 1 Day Unsold Follow Up Phone Call	2/7/2004	Simms, Sara	Phone Call	SYSTEM
	<input checked="" type="checkbox"/>	Send 1 Day Unsold Follow Up Letter	2/10/2004	Jamason, Ben	Letter	SYSTEM
	<input checked="" type="checkbox"/>	Future task	2/15/2004	Jones, Bob	None	Maguire, Brent