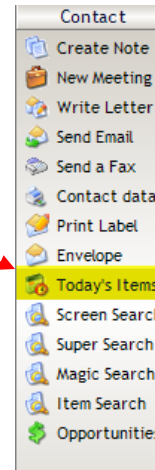


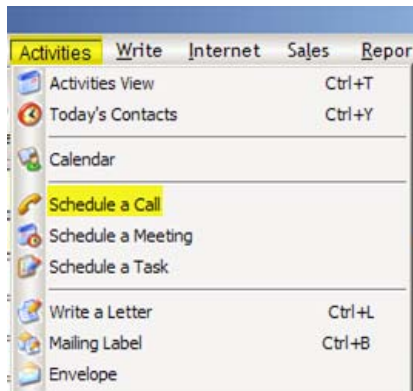
An "Activity" is another follow up tool in Customer Frontline and can be used in conjunction with future customer contacts that are posted through the Next Contact Date routine assigned with a notepad entry. A scheduled Activity will be listed in the "Today's Items" list on the day that the assignee is scheduled to follow up with a customer.



The Customer Frontline Activities scheduler is organized so that a sales person can assign a follow up contact for a customer to themselves, or assign a scheduled follow up contact for a customer to another person in the company. For example, a salesperson can schedule a follow up call to be made to a customer on a specific date. The assignment will be listed in the notepad area of the customer record. The customer record will be displayed on the assigned date when the "Today's Items" icon, located in the left toolbar, is clicked. This reminder will be displayed for the assignee, not the assignor. In other words, a follow up "Activity" is scheduled by an assignor and implemented by an assignee. This can be the same individual, or two different people. An Activity is scheduled as follows:

Click the "Activities" utility in the top toolbar, click "Schedule a Call".

This dialog box below will appear.



Call for Jeremey Beebe

User:

Date:

Time: :

Type:

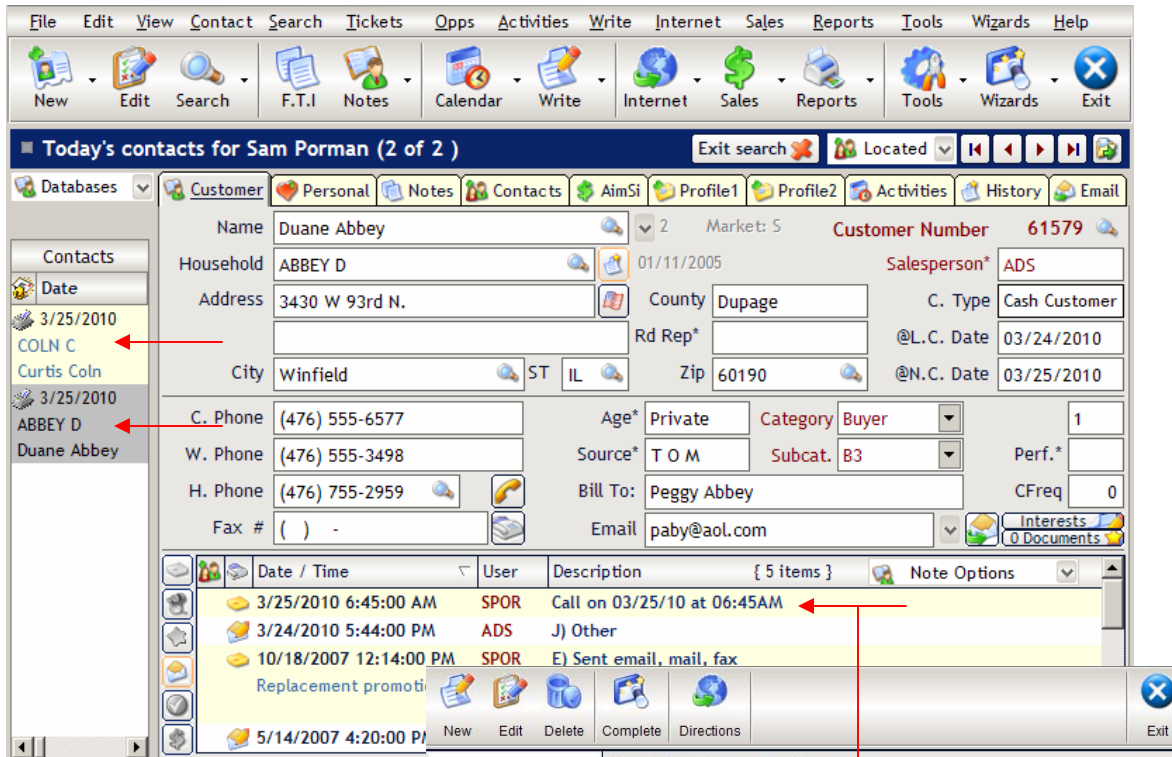
Use Activity Date for Next Contact Date

Note:

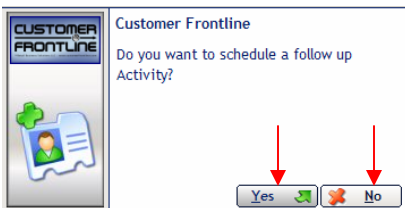
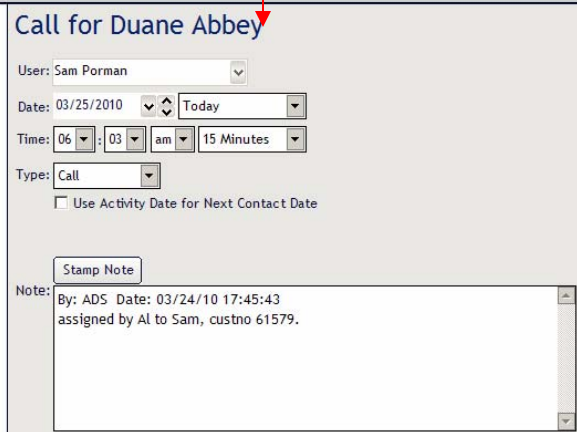
Notice that the assignee is Sam (User). He has posted a call for customer Jeremey Beebe to his follow up schedule for 04/10/10. Consequently, when Sam logs in to Customer Frontline on 04/10/10 and clicks the "Today's Items" Jeremy will be included in his follow up "to do list" for that day.

Scheduled activities are displayed in the customer record notepad area, as seen on the next page.

As the sample shows below, Customer Frontline is listing two customers previously scheduled for follow up contacts on 03/25/10. This list and the customer records were organized into a Customer Frontline Screen Search after user Sam clicked the Today's Items tab.

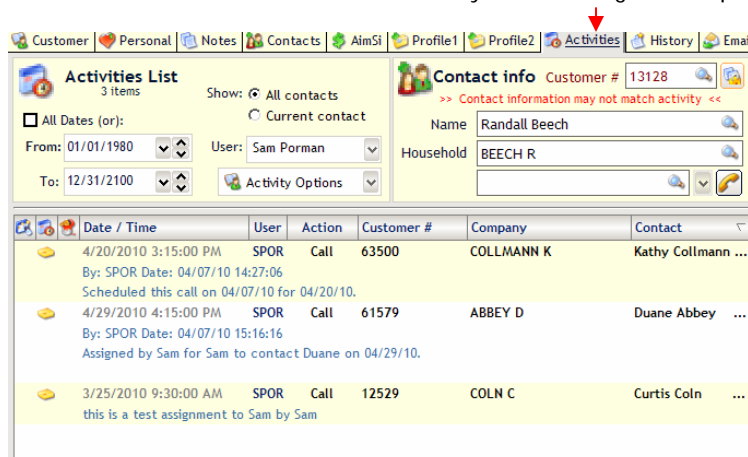


A double mouse click on the Activity header in the notepad will display the actual Activity dialog box as seen to the right. Note details are displayed in the lower portion of this dialog box. An Activity can be completed while in this dialog box: click the Complete button in the upper toolbar, click "Yes" in the first options box, a second Options box will appear: click Yes to schedule a new future contact with the customer. "No" will close the current Activity and remove the customer from your future contact schedule.



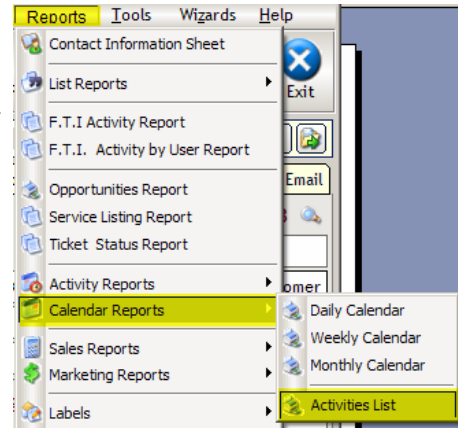
When "Yes" is selected a new Activity dialog box appears to assign a new follow up Activity for this customer, either to yourself or to another person in your company.

A listing of scheduled Activities can be displayed by clicking the "Activities" tab on a customer record.. This list is populated according to the content options that are selected: date parameter, user, all or current contact. Completed or deleted Activities are not included in the list. A double mouse click on any of the listings will display that Activity dialog box.



Sales Management: The Sales Person Activities Report

This is a management summary report of customer follow up contacts. It can be viewed / printed as follows:
 Click Reports | Calendar Reports | Activities List



The dialog box shown below will be displayed. Select a Salesperson, date parameter, and the category of follow up Activities that are to be included in the report.

The report sample below is generated from the selected options in the report dialog box above. Note that this report includes future and "completed" Activities to provide a more complete summary of customer follow up Activities done by Sam Porman during the specified date range.

Activities Detail Report

All activities for Sam Porman

Date	Time	Activity	Cust #	Company	Customer name	Phone
03/25/2010	06:45am	Call	61579	Duane Abbey	Duane Abbey	(476) 755-2959
Notes: By: ADS Date: 03/24/10 17:45:43 assigned by AI to Sam, custno 61579. { Completed on 04/07/2010 at 15:09:58 by Sam Porman }						
03/25/2010	09:30am	Call	12529	Curtis Coln	Curtis Coln	(476) 755-2959
Notes: this is a test assignment to Sam by Sam						
04/20/2010	03:15pm	Call	63500	Kathy Collmann	Kathy Collmann	(476) 755-2959
Notes: By: SPOR Date: 04/07/10 14:27:06 Scheduled this call on 04/07/10 for 04/20/10.						
04/29/2010	04:15pm	Call	61579	Duane Abbey	Duane Abbey	(476) 755-2959
Notes: By: SPOR Date: 04/07/10 15:16:16 Assigned by Sam for Sam to contact Duane on 04/29/10.						