Utility: Customer Follow Up Activities

Assign Follow Up Contact Dates by User by Customer
With Optional Link To Outlook Calendar & Tasks Option

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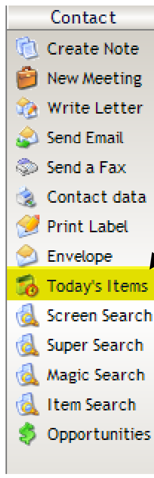
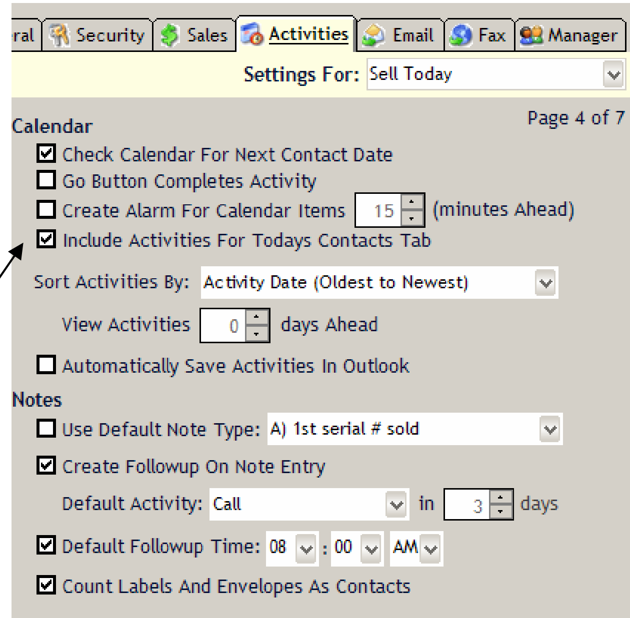
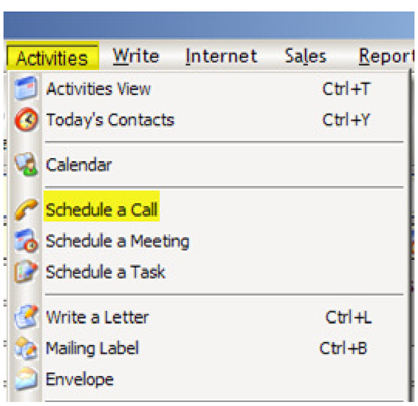
Riata CRM posts assigned customer follow up Activities in the “Today’s Items” list on the day that the assignee is scheduled to follow up with a customer. Verify that all Riata user settings are turned on for this utility as shown on the right.

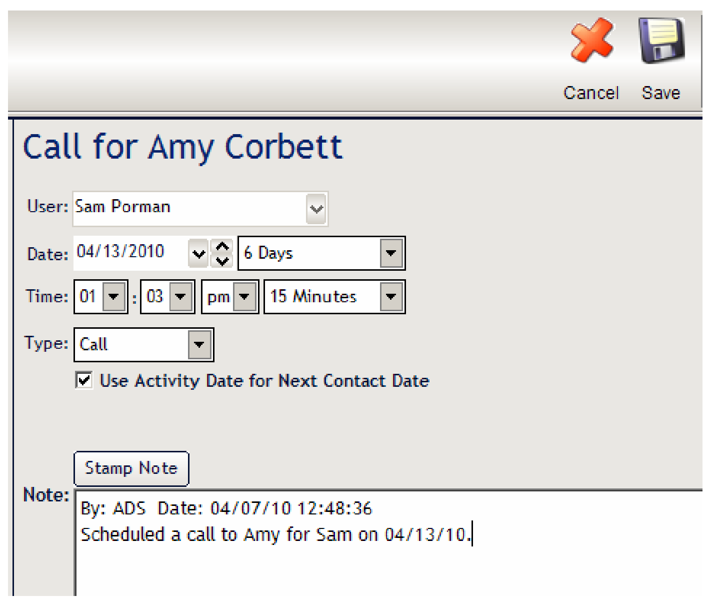




The Riata CRM Activities scheduler is organized so that a user can assign a follow up contact for a customer to themselves, or assign a scheduled follow up contact for a customer to another person in the company. For example, a salesperson can schedule a follow up call to be made to a customer on a specific date. The reminder will show up in the notepad area of the customer record 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, follow up “Activities” are scheduled between an assignor and an assignee. This can be the same individual, or two different people. An Activity is schedules as follows:



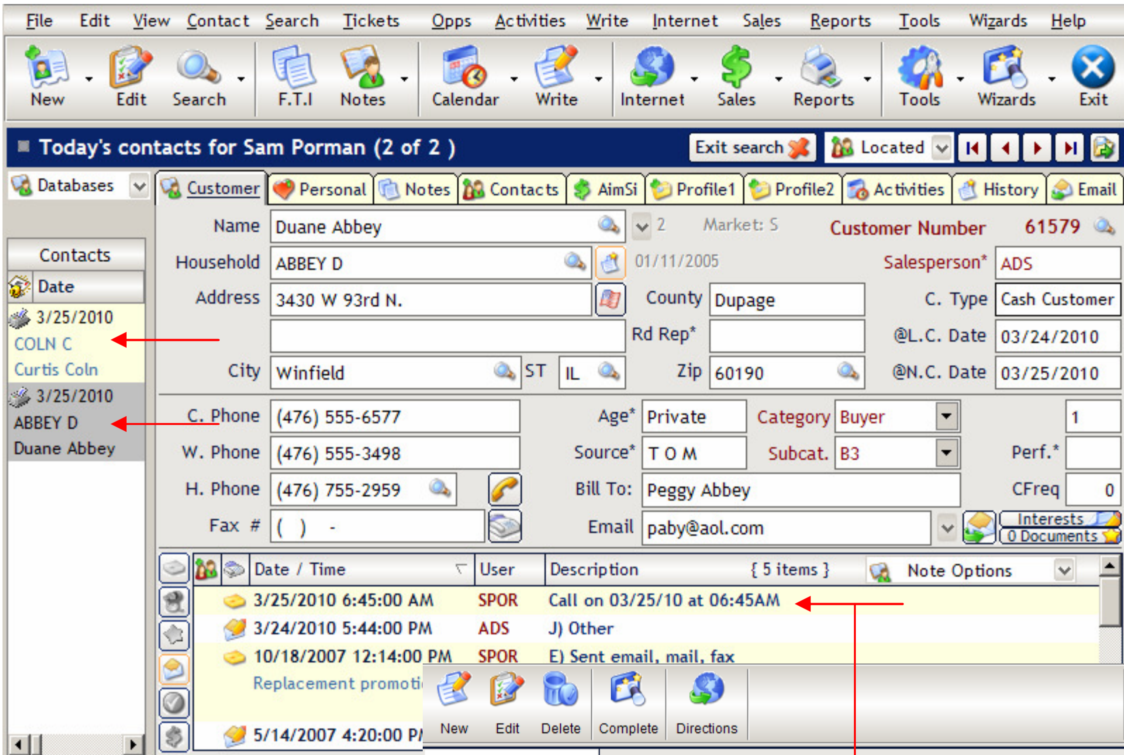
Click the “Activities” utility in the top toolbar, click “Schedule a Call”. This dialog box will appear:



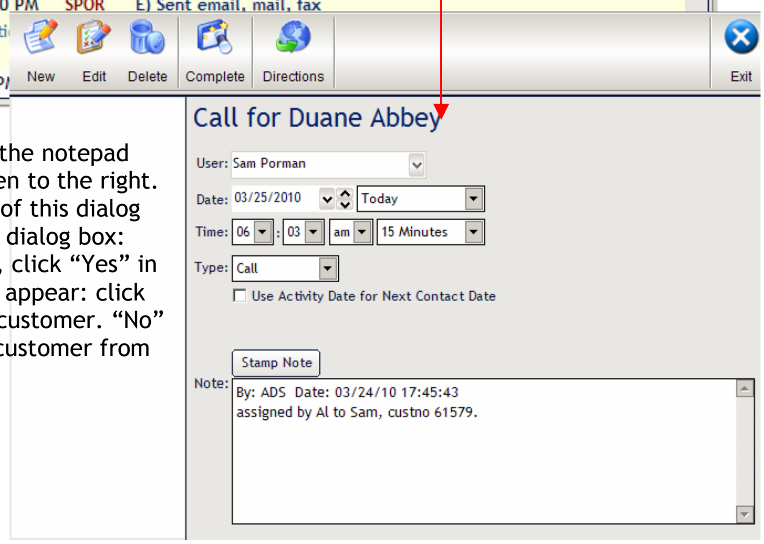
Notice that the assignor is ADS (stamped note); the assignee is Sam (User). ADS has posted a call for customer Amy Corbett on Sam’s schedule for 04/13/10. Therefore, when Sam logs in to Riata on 04/13/10 and clicks the “Today’s Items” Amy will be included in his follow up list.

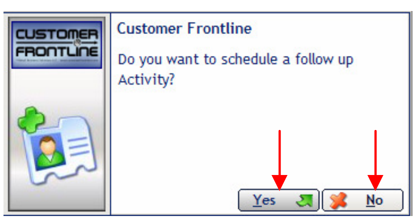
Scheduled activities are displayed in the customer record notepad area, as seen on the next page.

As shown below, Riata listed two customers on 03/25/10. This list and the customer records were organized into a Riata Screen Search after user Sam clicked the Today's Items tab.



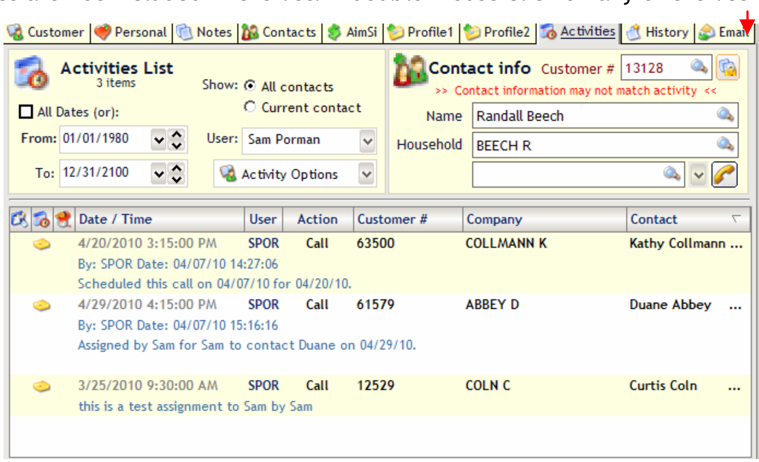
A double mouse click on the Activity header in the notepad will display the actual Activity dialog box as seen to the right. Note details are displayed in the lower portion of this dialog box. An Activity can be completed while in this dialog box: click the Complete button in the upper toolbar, click "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.



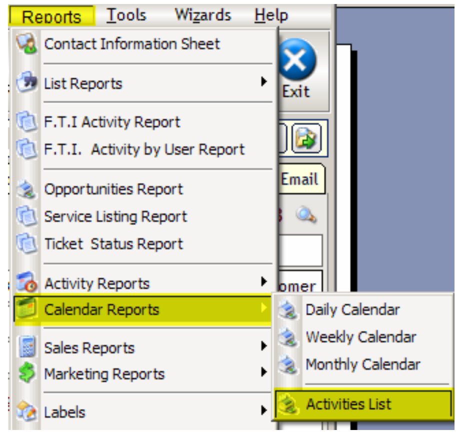


When "Yes" is selected a new Activity dialog box appears to assign a new follow up Activity for this customer, either to yourself or to another person in your company.

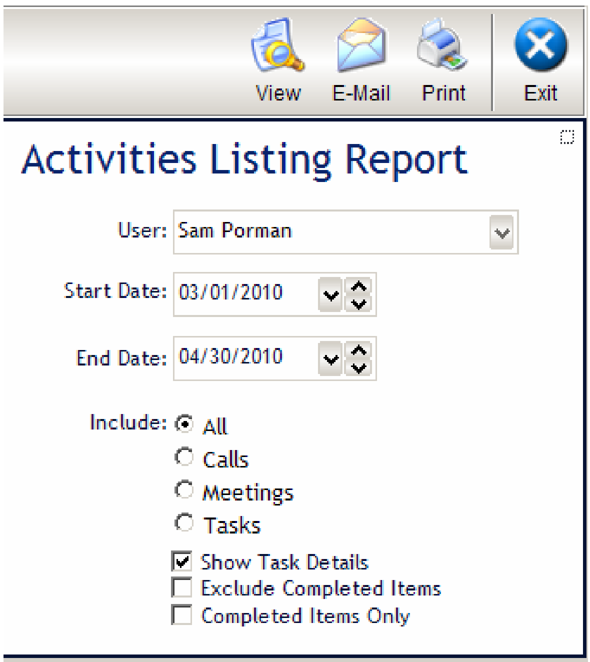
A listing of scheduled Activities can be displayed by clicking the "Activities" tab on a customer record.. This list is populated according to the content options that are selected: date parameter, user, all or current contact. Completed or deleted Activities are not included in the list. A double mouse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



A summary report of Activities can be viewed / printed as follows:
Click Reports | Calendar Reports | Activities List



The dialog box shown below will be displayed. Select a User, date parameter, and category of Activities 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 "completed" Activities to provide a more comprehensive summary of customer follow up activities by user Sam Porman.

Activities Detail Report

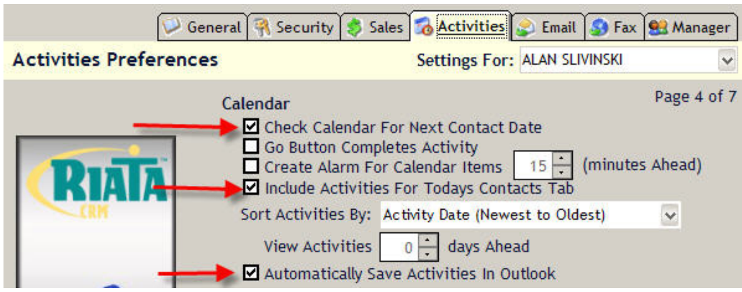
All activities for Sam Porman

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 Al 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.						

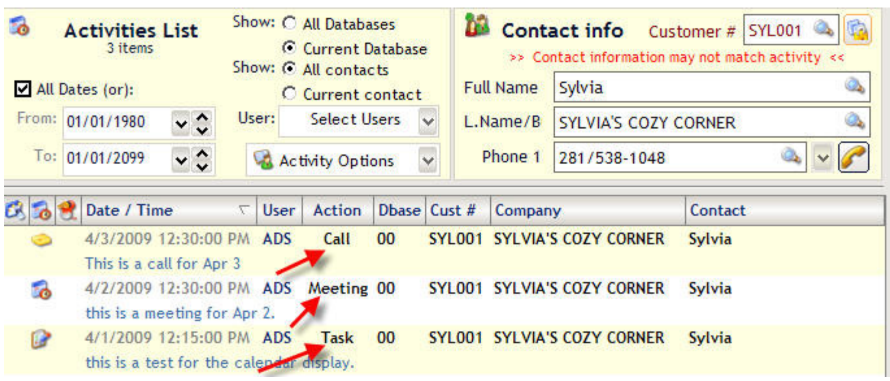
Optional Riata CRM Integration With The Outlook Calendar & Tasks Lists

This utility requires the proper installation of Microsoft Outlook, per system network configuration.

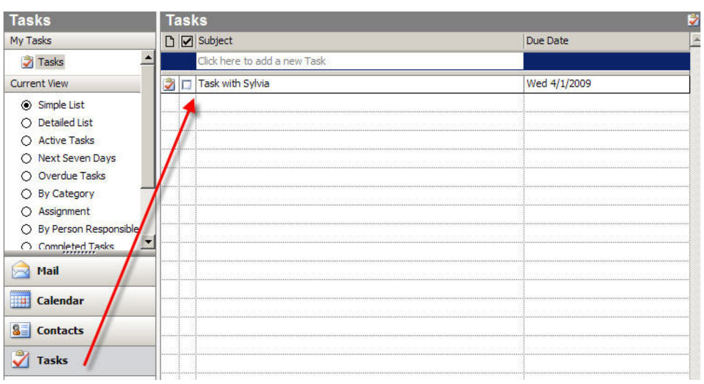
Riata™ CRM will enter scheduled Activities into the Outlook calendar of the user who is assigned to follow up with a customer. Verify that these three user settings are turned on for this utility, see below.
Note: Outlook must be properly installed according to LAN and WAN requirements.

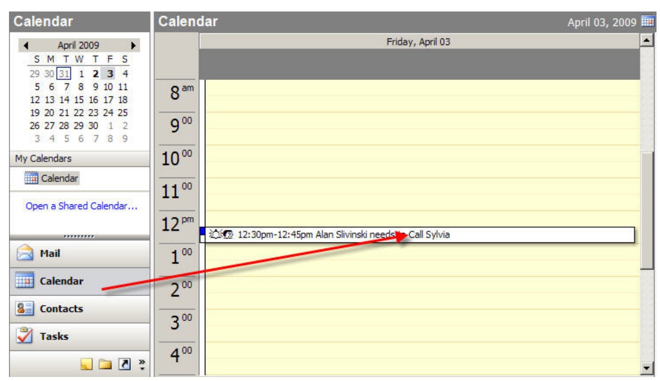


Three types of follow up Activities can be scheduled: Call, Meeting, or Task. Depending on which activity type is chosen will determine where the activity is placed on the Outlook calendar.



The “Task” category of activity is displayed on the “Tasks” tab of the Outlook calendar on the scheduled contact date. “Calls” and “Meetings” are listed on the “Calendar” tab of the calendar screen on the assigned contact date.





The Riata CRM Activities scheduler is designed to manage follow up contacts with customers, based on assignments made by an employee either to themselves or to another employee. For example, a salesperson can assign a follow up contact for a customer by a service department employee, etc. By using this Riata CRM Activities utility your customers will receive follow up contacts that are timely and specific to their specific needs.