



Training Course: Task List

Tuesday, January 14, 2009
10:00 – 11:00 am EST



Agenda



- Overview of the Task List Screen
- Icons across the top
- Making Appointments
- Viewing Appointments & Filters
- Working Your Task List
- Clearing Appointments
- Clear the Task List for Deletion
- Roll-over the Task List
 - Move Appointment (s) to another date
 - Delete Appointment (s)
 - Clear Appointment (s)
- Re-scheduling appointments
- Printing the Task List
- Questions & Answers

Overview of the Task List Screen



- Click on the  icon to access the Task List

Task List


Calls Meetings ToDo's High Medium Low With Alarms Without Alarms Timeless With Time

ID/Status Contains Regarding Contains

Show tasks from 12/17/2008 Show tasks to Future [View Task List](#)

Task List for Gail Stevens, Showing activities from 12/17/2008 to Future

Date/Time	Type	Scheduled For	Priority	Regarding	Clear	Reschedule	
1/6/2009 Timeless	Call	Gail Stevens	High	call re surgery - Joe Barber , Media Mania, Inc. , - Customer Ph: 310-555-6710 Mobile: 310-555-5555	Clear	Reschedule	
1/12/2009 9:30 AM	Call	Gail Stevens	Low	Training Wired via GoTo Meeting - John Smith , John Smith Co , - Customer Ph: 201-222-2222	Clear	Reschedule	
1/12/2009 12:30 PM	Meeting	Gail Stevens	Low	Presentation - John Smith , John Smith Co , - Customer Ph: 201-222-2222	Clear	Reschedule	

- The green checked boxes  is to filter the type of task
- ID/Status & Regarding are 2 other methods to filter tasks
- Calendar boxes allows you to view a Today, Tomorrow, This Week, Next Week, Past, Future, All or a Date Range
- Task information for the requested date range and filter (s)

**** NOTE: Columns & Fields CAN be added to the Task List – see your administrator**

Task List icons

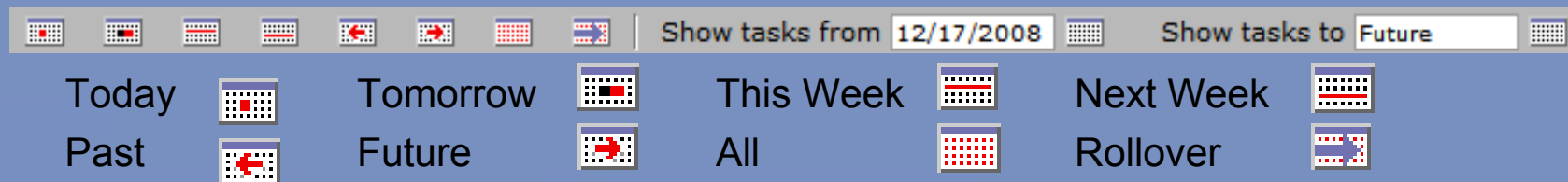



- The green box filters



- Type of Meeting
- Priority of the Meeting
- If the alarm box is selected (or not selected)
- Time of the meeting or timeless

- Filters which days (dates) to view



- Show tasks from and Show tasks to – Validate values include:
 - Date field (can select a date from ) or use the buttons to the right.



View your TASKLIST / Select Users / Print Report

Making Appointments



- If the customer exists on the Task List, you can schedule a new appointment or re-schedule an appointment.
 - Schedule a new appointment:
 - Locate the customer and click on the customer name (see the blue name John Smith in this example).

Regarding

Send proposal - **John Smith**, Test Company , - **Prospect A**
Ph: 404-555-1992

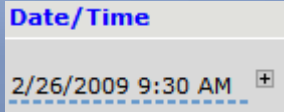
- This will bring you to the Contact record. You then have the capability to Schedule a Call, Meeting or To Do. You can also Record a completed appointment to history.



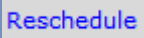
Making Appointments



– Re-schedule a new appointment

- Click on the Date/Time and you will see a dotted blue line appear  this puts the information into an edit

mode, where you can type the new date/time and the system will automatically update the information.

- Click on the  button and the meeting schedule screen will appear



Schedule with: Novak

Type: Call Priority: Low Timeless:

Date: 2/26/2009 Time: 11:30 AM Duration: 30

Set Alarm: Lead Time: 10

Regarding: conference call

Details:
Review the contract

Schedule For: Gail Stevens Reschedule Cancel

Scheduled By: Gail Stevens

Select date, time and duration below

February 2009							March 2009							April 2009						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
1	2	3	4	5	6	7	1	2	3	4	5	6	7	8	9	10	11	12	13	14
8	9	10	11	12	13	14	8	9	10	11	12	13	14	5	6	7	8	9	10	11
15	16	17	18	19	20	21	15	16	17	18	19	20	21	12	13	14	15	16	17	18
22	23	24	25	26	27	28	22	23	24	25	26	27	28	19	20	21	22	23	24	25
							29	30	31					26	27	28	29	30		

9:30	10:30	11:30	12:30	1:30	2:30	3:30	4:30	5:30	6:30
5min	10min	15min	20min	30min	45min	1hr	2hr	4hr	1day

On ANY scheduling screen, after you enter the DATE all the appointments you have scheduled for that day are indicated in **ORANGE**. This helps prevent scheduling conflicts.

Viewing Appointments



- First, update the filters to locate the appointments which you want to view. In this example, update the search was based on 1/12/09 till 2/9/2009

Task List

Calls
 Meetings
 ToDo's
 High
 Medium
 Low
 With Alarms
 Without Alarms
 Timeless
 With Time

ID/Status Contains Regarding Contains

Show tasks from 1/12/2009 Show tasks to 2/9/2009 [View Task List](#)

Task List for Gail Stevens , Showing activities from 1/12/2009 to 2/9/2009

- The information which matches the entered criteria will display below:

Task List for Gail Stevens , Showing activities from 1/12/2009 to 2/9/2009

Date/Time	Type	Scheduled For	Priority	Regarding	Clear	Reschedule	AA
1/12/2009 9:30 AM	Call	Gail Stevens	Low	Training Wired via GoTo Meeting - John Smith , John Smith Co , - Customer Ph: 201-222-2222	Clear	Reschedule	
1/12/2009 12:30 PM	Meeting	Gail Stevens	Low	Presentation - John Smith , John Smith Co , - Customer Ph: 201-222-2222	Clear	Reschedule	
1/12/2009 2:00 PM	Call	Gail Stevens	Low	Follow up - Tom Gallagher , WiredContact , - Customer Ph:	Clear	Reschedule	

Showing 1-12 of 12

NOTE: If you click on the [Customer Name](#) in blue, it will bring you directly to the Customer contact record

Working Your Task List



Once you scheduled appointments you now are ready to WORK the Task List

- Review the accounts before starting the week
- Update Contact information directly from the Task List (Remember – fields/columns can be added !)
- Run Analysis reports.
- Modify schedules (if necessary)

Task List for Gail Stevens , Showing activities from 2/22/2009 to 2/27/2009							
Date/Time	Type	Scheduled For	Priority	Regarding	Clear	Reschedule	⊞
2/26/2009 9:30 AM	Todo	Gail Stevens	Low	Send proposal - John Smith , Test Company , - Prospect A [⊞] Ph: 404-555-1992	Clear	Reschedule	
2/26/2009 11:30 AM	Call	Gail Stevens	Low	conference call - Novak , Big Chuck Diners , - customer Ph: 545-857-59 Details: Review the contract	Clear	Reschedule	
2/26/2009 1:30 PM	Meeting	Gail Stevens	Low	Proposal Presentation - Walter Matthews , Bridge Concepts, Inc. , - ACT Certified Consultant Ph: 214-691-3988	Clear	Reschedule	

Showing 1-3 of 3

Working Your Task List



Task List for Gail Stevens , Showing activities from 2/22/2009 to 2/27/2009							
Date/Time	Type	Scheduled For	Priority	Regarding	Clear	Reschedule	AA
2/26/2009 9:30 AM	Todo	Gail Stevens	Low	Send proposal - John Smith , Test Company , - Prospect A	Clear	Reschedule	
2/26/2009 11:30 AM	Call	Gail Stevens	Low	conference call - Novak , Big Chuck Diners , - customer Ph: 545-857-59 Details: Review the contract	Clear	Reschedule	
2/26/2009 1:30 PM	Meeting	Gail Stevens	Low	Proposal Presentation - Walter Matthews , Bridge Concepts, Inc. , - ACT Certified Consultant Ph: 214-691-3988	Clear	Reschedule	

Showing 1-3 of 3



Reviewing the accounts (there are 2 main ways to review accounts)

1. Go to the Task List and display the days you want to review. Click on the BLUE name under the REGARDING section. This will bring you directly to the Contact Record. Click on the TASK LIST or Back button to go back to the TASK LIST.
2. Click on the binoculars , this will “move” all the contact on the TASK List to the Lookup. From the Lookup you can:
 - Review the Contact Records (click on the)
 - Click on the Report icon - Any of the reports based on Lookup would display the Task List records.








Contact Reports	
	Contact List (Lookup)
	Current Contact
	Complete Contact Report (Lookup)
	Address Book - Wired (Lookup) Excel

Working Your Task List



- If the Contact information is on the Task List – you can update it directly from the Task List.
 1. Click directly on the Field and the blue underline will appear. Make your changes. Update Contact information, Appointments, etc.
 2. If the blue underline does NOT appear –
 - Go to MY RECORD 
 - Click on the Edit User Settings 
 - Check off the Box next to ACTIVE EDIT ON.

NOTE – If this option is not available to you – see your system administrator

Date/Time	Type	Scheduled For	Priority	Regarding	Clear	Reschedule	
<u>2/26/2009 9:30 AM</u> 	<u>Todo</u> 	<u>Gail Stevens</u> 	<u>Low</u> 	<u>Send proposal</u>  - <u>John Smith, Test Company</u> , - <u>Prospect A</u>  Ph: <u>404-555-1992</u>	Clear	Reschedule	

3. You can modify the appointment by typing directly on the screen (blue underline or clicking on the Reschedule)

Working the Task List



- **Contact Record – Activity List**
 - Any information which displays on the Contact Record's ACTIVITY List is also displaying on the TASK LIST [once the appointment has been CLEARED (DONE) it moves from the Activity TAB to the History TAB].
 - Any modification which you make here also updates the Task List.
 - Click on the field to update the information – blue underline
 - Click on the Reschedule to modify the appointment.
 - Update the information in ONE place and it updates on ALL screens

Date/Time	Type	Priority	Scheduled For	Scheduled By	Regarding	Clear	Reschedule
11/28/2008 10:30 AM	Meeting	Low	Zach Paul	Zach Paul	Ask for the order	Clear	Reschedule
11/19/2008 7:06 AM	Call	Low	Zach Paul	Zach Paul		Clear	Reschedule

Clearing Appointments



- **There are 2 reasons to “CLEAR” an appointment**
 1. The appointment is complete and you want to move it from planned activity to history
 2. The appointment is being cancelled and you don't have a plan to re-schedule it

NOTE: *When the appointment is on the TASK list your can view the “planned” appointment on the ACTIVITY tab on the Contact record. Once cleared, the information is now available on the HISTORY tab. You can clear an appointment from the TASK list (or on the CONTACT – ACTIVITY tab)*

- All the processing starts by clicking on the  button.

Clearing Appointments



- Once you have clicked the CLEAR button the appointment screen will then appear:

Clear Activity with: John Smith

Type: Meeting **Priority:** Low **Timeless:**

Date: 1/12/2009 **Time:** 12:30 PM **Duration:** 30

Set Alarm: **Lead Time:** 10

Regarding: Presentation **Results:** Meeting Held

Details:

Schedule For: Gail Stevens **Clear** **Cancel**

Scheduled By: Gail Stevens

Select date, time and duration below:

February 2009							March 2009							April 2009						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
1	2	3	4	5	6	7	1	2	3	4	5	6	7				1	2	3	4
8	9	10	11	12	13	14	8	9	10	11	12	13	14	5	6	7	8	9	10	11
15	16	17	18	19	20	21	15	16	17	18	19	20	21	12	13	14	15	16	17	18
22	23	24	25	26	27	28	22	23	24	25	26	27	28	19	20	21	22	23	24	25
							29	30	31					26	27	28	29	30		

9:30	10:30	11:30	12:30	1:30	2:30	3:30	4:30	5:30	6:30
5min	10min	15min	20min	30min	45min	1hr	2hr	4hr	1day

Clearing Appointments



- Typical Meeting Types and their default Clear Results:

Type of Appointment	Default CLEAR Results
CALL	Call Attempted
	Call Completed
	Call Erased
	Call Left Message
	Call Received
MEETING	Meeting Erased
	Meeting Held
	Meeting Not Held
TO DO	E-mail Sent
	E-mail
	Fax Sent
	To Do Done
	To Do Erased
SALES	To Do Not Done
	Closed/Won Sale
	Lost Sale

Deleting Appointments



- There are times when scheduled appointments need to be deleted (erased). Other options would be to re-schedule for a future date or roll appointments for another day.
- This can be performed from either the Task List or the ACTIVITY Tab found on the Contact Record.
 1. Find the appointment which needs to be “deleted”
 2. Click on the CLEAR button **Clear**
 3. On the RESULTS section – select the options which is ERASED [Call Erased, Meeting Erased, To Do Erased]. This record will then display under the HISTORY Tab on the Contact Record.
 4. If you want to DELETE the History records (and have the security to perform deleted). Click on the RED Tab after the History Record

Date/Time	Record Manager	Type	Subject	Regarding
1/13/2009 10:00 AM	Gail Stevens			
1/13/2009 9:00 AM	Gail Stevens			


- You will be prompted Delete ? Click on the OK button to finalize the deletion.



Note: There is also a way to DELETE appointments using the ROLLOVER icon on the TASK List – You will see this shortly

Rollover Appointments



- There are times when you need to roll a single or group of appointments to another DATE [e.g. Out Sick]
- Start at the TASK List and display the appointments which need to be moved (use your filters).
- Click on the Rollover activity icon 
- All the appointments will be selected. Uncheck any appointment you do NOT want to be Roll Over. Only the Selection CHECKED items will be moved

Select activities to roll over:

Selections	Type/ When	Regarding
<input checked="" type="checkbox"/>	Customer Ser 11:00 AM 1/14/2009	John Smith
<input checked="" type="checkbox"/>	Marketing Ca 11:30 AM 1/14/2009	John Smith
<input checked="" type="checkbox"/>	Meeting 12:00 PM 1/14/2009	John Smith
<input checked="" type="checkbox"/>	Other 12:30 PM 1/14/2009	John Smith
<input checked="" type="checkbox"/>	Sale 1:00 PM 1/14/2009	John Smith
<input checked="" type="checkbox"/>	Service Call 1:30 PM 1/14/2009	John Smith
<input checked="" type="checkbox"/>	Todo 2:00 PM 1/14/2009	John Smith

[Toggle All](#)

to

[Show Clear Section](#)
[Show Delete Section](#)

- Select the Date that you want the appointments to be moved to and press the button. Roll Over Selected.

Rollover to Delete an Appointment



- The Rollover option can also be used to DELETE a single appointment or group of appointments.
- Start at the Task List and display the appointments using your filters
- Click on the Rollover icon and check the appointments which need to be deleted.
- Click on the option SHOW DELETE SECTION and the following options will display

Select activities to roll over:

Selections	Type/ When	Regarding
<input checked="" type="checkbox"/>	Marketing Ca 11:30 AM 1/14/2009	John Smith
<input type="checkbox"/>	Meeting 12:00 PM 1/14/2009	John Smith
<input type="checkbox"/>	Other 12:30 PM 1/14/2009	John Smith
<input type="checkbox"/>	Sale 1:00 PM 1/14/2009	John Smith
<input type="checkbox"/>	Service Call 1:30 PM 1/14/2009	John Smith
<input checked="" type="checkbox"/>	Todo 2:00 PM 1/14/2009	John Smith

[Toggle All](#)

to

[Show Clear Section](#)
[Show Delete Section](#)


OR

- Click on the Delete Selected and those appointments will be deleted from the schedule

- In this example 2 appointments were deleted

Rollover to Delete an Appointment



- The Rollover option can also be used to CLEAR a single appointment or group of appointments.
- Start at the Task List and display the appointments using your filters
- Click on the Rollover icon  and check the appointments which need to be deleted.
- Click on the option SHOW CLEAR SECTION and the following options will display

Select activities to roll over:

Selections	Type/ When	Regarding
<input checked="" type="checkbox"/>	Meeting 12:00 PM 1/14/2009	John Smith
<input checked="" type="checkbox"/>	Other 12:30 PM 1/14/2009	John Smith
<input checked="" type="checkbox"/>	Sale 1:00 PM 1/14/2009	John Smith
<input checked="" type="checkbox"/>	Service Call 1:30 PM 1/14/2009	John Smith

[Toggle All](#)

to

[Show Clear Section](#)
[Show Delete Section](#)

OR

- Click on the Clear Selected to History. This will move all the SELECTED appointments to the History Tab and off the Task List.

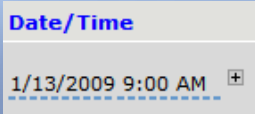
Re-Scheduling Appointments



- There are 3 methods to Re-Schedule your appointments
 1. Re-schedule the Date / Time from the TASK List screen by clicking directly on the Date/Time fields
 2. Re-schedule the Date / Time from the TASK List screen by selecting the RE-SCHEDULE button.
 3. Re-schedule the Date / Time from the CONTACT screen – ACTIVITY tab by selecting the RE-SCHEDULE button.

Re-Scheduling Appointments



1. Re-schedule from the Task List by clicking on the Date/Time  when the blue underlining appears you can type your changes to the Date/Time directly on the screen. The new Date/Time will be automatically updated and reflected on the Contact Activity tab as well as the Task List (after the Task List has been refreshed)

Re-Scheduling Appointments



- Using the RE-SCHEDULE button (this could have been from the TASK List or the Contact Record - ACTIVITY TAB.)

Schedule with: Tom Gallagher

Type: Other **Priority:** Low **Timeless:**

Date: 1/13/2009 **Time:** 9:00 AM **Duration:** 10

Set Alarm: **Lead Time:** 10

Regarding:

Details:

Schedule For: Gail Stevens

Scheduled By: Gail Stevens

Select date, time and duration below:

February 2009							March 2009							April 2009						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
1	2	3	4	5	6	7	1	2	3	4	5	6	7				1	2	3	4
8	9	10	11	12	13	14	8	9	10	11	12	13	14	5	6	7	8	9	10	11
15	16	17	18	19	20	21	15	16	17	18	19	20	21	12	13	14	15	16	17	18
22	23	24	25	26	27	28	22	23	24	25	26	27	28	19	20	21	22	23	24	25
							29	30	31					26	27	28	29	30		


9:30	10:30	11:30	12:30	1:30	2:30	3:30	4:30	5:30	6:30
5min	10min	15min	20min	30min	45min	1hr	2hr	4hr	1day

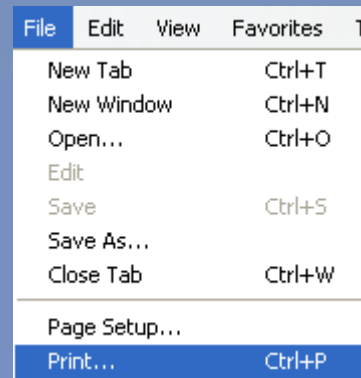
Any of the information can be updated using this options:

- * Date
- * Time
- * Regarding
- * Details
- * Alarm
- * etc.

Printing the Task List



1. Use the filters options to display the information for printing
2. Click on the PRINT REPORT ICON 
3. The Task List will display in a report format
4. Select FILE -> PRINT
5. Print as normal



NOTE: Don't forget to close the Task List Report by clicking the "x" in the top right-hand corner of the screen.

Questions & Answers



WIREDCONTACT