

# Contact Management

---

## *Introduction*

Run-down of the four Calendar Icons

- Daily Planner
- Daily Calendar
- Monthly Calendar
- Create New Activity

## *Creating Activities*

### **Manual vs Automatic Activities**

- View candidate Activity Log for comparison
- Manual → Phone call, meeting, anything you need to manually create
- Automatic → Email logging, record creations (person, job orders)

### **Creating Activities**

- Create new Activity from a Person's record
- It is best to create Activities directly from a Person, Company or Job Order
- Overview of Fields in an Activity Record
  - **Activity codes:** are customizable and should reflect your company's business process
  - **Primary link** – default to person the record was created from
  - **Subject Line** – do not have to fill in; will auto populate based on Activity Code & primary link (ie, "LastName, Firstname: Phone Call)
  - **Notes** – Information about the event that occurred
    - ✓ **pop up editor** will make notes area bigger and brings up timestamp
  - **Scheduled date** – date the call or Activity occurred
    - ✓ Will default to today's date
  - **Starting & ending time** - Do not have to include unless you want to set an **alarm** or you want the event on your **Calendar**
  - **Responsibility** – the Planner the Activity will appear on
  - **Status** – the Status of the Event (ie Completed, In Progress, Not Started)
    - ✓ Most important field on whole screen
    - ✓ Will effect usage of Daily Planner and reporting

- **CALENDAR OPTIONS** - On Calendar, Tentative, Private
- **Alarm** – similar to setting alarms in Outlook
  - ✓ If you choose to merge calendars with Outlook, alarms will also be pulled over & duplicated

## LINKS

- **Activity Links** – allows link of Person, Company, Job Order to Activity
  - ✓ Useful for linking candidates to Job Orders
- **Linked Staff reps** – can Include or Notify different StaffReps
  - ✓ **Include** - will put the activity on users calendar if option chosen, will give user alarms if alarms are chosen
  - ✓ **Include/Notify**: will do everything mentioned above plus send an instant notification to the user, similar to an alarm
  - ✓ **Notify**: Just notifies the user of the Activity creation

## SAVING OPTIONS

- **Save & Follow-Up** – allows for creation of a Follow-Up Activity
  - ✓ Default follow up Activity codes and settings can be set in **SETTINGS**  
→**SYSADM OPTIONS** →**ACTIVITY CODE SETUP**
- **Save & Close**
- **Save**
- **Recurring** – can create Recurring Activities, ie weekly Sales Meeting
- **Cancel/Close**

## *Day-In-the-Life Examples*

This class takes you through several real-life examples of when you would create basic phone call activities, schedule Follow-Up Activities, and create Resume Submittal activities. The Phone Call Activity explains the fields listed above in detail, and serves as the primary example.

### *Scenario #1: Create Phone Call Activity for Candidate*

- Create a Manual activity from a candidate record
- Select activity code “**Phone Call**”
- Type in notes about the phone call that occurred (i.e., Spoke to Mike, great candidate)
- Mark Status off as **Completed**
- Save & Close the Activity
  - ✓ View Completed Activity in Candidate **Activity Log**

**Activity Records**

Act Code: Phone Call Primary Link: Seldal, Joshua 5782  
 Subject: Seldal, Joshua: Phone Call

Primary call with Josh...Great candidate for any type of management position. Looking to start ASAP and remain in the MN area if possible.

Sched Date: 5/21/2009 \*Resp: SYSADM  On Calendar  Set Alarm  
 Starting: \*Status: Completed  Tentative Lead Time:  
 Ending Time: Duration: 15  Private \*Units:

Due Date: Priority: 1 Created: SYSADM 5/21/2009 1:55 PM  
 Due Time: Cost \$: \$0.00 Updated: SYSADM 5/21/2009 1:55 PM  
 Attempts: \*Cost Cat: Completed: SYSADM 5/21/2009 1:55 PM

Companies  Employees  Job Orders  Persons All Persons

\*5782 Seldal, Joshua

Linked Staff Reps  
 BJONES  
 BROBERTS  
 CRDTMGR  
 CROTH  
 GABBY  
 HELEN  
 JSMITH  
 LAK

Option to save as individual/multiple activities is not available for this combination of links

Save & Follow-Up Save & Close Save Recurring... Cancel/Close

NUM

**Scenario #2: Create Follow Up Activity for Candidate or Contact**

- Create a Manual activity from a Candidate or Contact record
- Select activity code “**Phone Call**”
- Put the scenario in the notes (i.e. “*Spoke with Joe. Great candidate but will not be available until \_\_ date. Call then to follow up*” OR “*Spoke with James about X. Will call next Monday to touch base.*”)
- Make sure the date is correct and the status is set to **Completed**
- **Save & Follow Up** the activity
  - ✓ Hit yes when prompted for “Is this a follow up for the current activity”
- Select appropriate Activity Code (ie, “**Follow Up Call**”)
- ✓ Notes from the previous Activity will carry over into the Notes field
- Select follow up **Date**
- Make sure the **Status** is set to an uncompleted Status Code, ie “**Not Started**”
- Set an alarm for the activity if needing a reminder
- Save & Close
  - ✓ **2 new activities** will be in the Person’s Activity Log

- *Scenario #3: Linking Candidates and Job Orders*

- Create new activity from Candidate record
- Select *Resume Submittal* activity code
- Make sure the status is Completed
- Go down to **Activity Links**
  - ✓ Select Job Order for record lookup
  - ✓ Look up Job Order by Order Description and select from drop down list

**Activity Records - Enter New Record**

Act Code: Resume Submittal    Primary Link: Seldal, Joshua    5782

Subject: Submitted to client

Sched Date: 5/21/2009    \*Resp: SYSADM     On Calendar     Set Alarm

Starting:    \*Status: Completed     Tentative    Lead Time:     Private    \*Units:   

Ending Time:    Duration: 15

Due Date:    Priority: 1    Created: SYSADM 5/21/2009

Due Time:    Cost \$: \$0.00    Updated:   

Attempts:    \*Cost Cat:    Completed:   

Companies     Employees     Job Orders     Persons    All Persons

*5782	Seldal, Joshua
668	Software Sales
490	ABC Company
5759	Johnson, James

Linked Staff Reps

- BJONES
- BROBERTS
- CRDTMGR
- CROTH
- GABBY (Incl)
- HELEN
- JSMITH (Notify)
- LAK

Option to save as individual/multiple activities is not available for this combination of links

              

NUM

### *The Daily Planner*

The Daily planner is a contact management tool that can be used to view, edit, and complete Activities. The planner is also an excellent querying & reporting tool that can be used to monitor and report on Staff Rep Activity.

## Status Codes & Uncompleted Activities

- To use the Planner as a Contact Management tool, you need to view your outstanding Activities or “To-Do List”
- **Uncompleted Activities** are any Activity in WinSearch with an outstanding status, such as *In Progress* or *Not Started*
- *Null or None* is also an option on the planner that you will not see in the Activity window Status Code LOV
  - Null or None will select any Activity that was created without a **Status**
  - SYSADM can require all activities to have a Status **SETTINGS**  
→ **SYSADM OPTIONS** → **ACTIVITY CONTROL OPTIONS**

## Date Range

- When using the planner on a daily basis, the most ideal date range to view outstanding activities is **Thru Today**
  - **Thru Today** encompasses all Activities with today’s date, going backwards in time
  - Allows the “roll over” of Activities on the Planner from day to day, until completed
  - Coupled with **Uncompleted Activities**, this will give an ideal view of all outstanding Activities through today
- TIP - *If you have never used the planner before, Thru Today may contain a very large amount of Activity Records, so using “Today” and “This Week” are good options for getting started*

## Activity Codes

- You also have the ability to select what types of Activities to see as a default
- Multiple Codes can be selected at once
- All Values is usually a fine option, depending on how your company uses Activities

## Saving Settings

Once changes have been made, you can set these settings as a default to appear when you open your planner.

- **QUERY** → **SAVE CURRENT CRITERIA AS DEFAULTS**
- This will save **criteria** selected settings only, NOT window settings
- **Window Settings** can still be saved under the normal **VIEW** → **SAVE WINDOW SETTINGS**

*See the recorded webinar “All About the Daily Planner” for more coverage of Daily Planner usage and tools.*