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

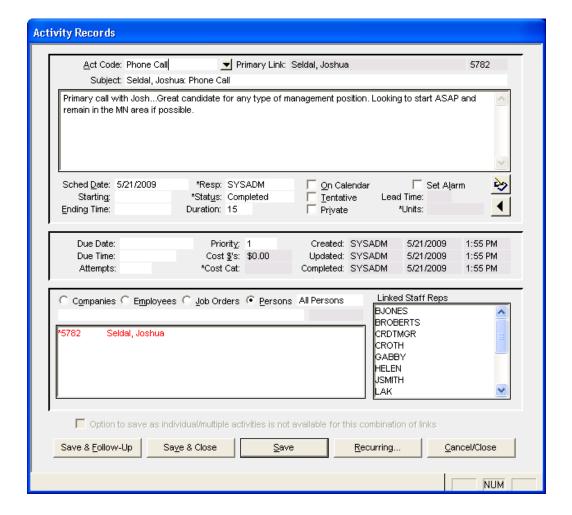
 → SYSADM OPTIONS → ACTIVITY CODE SETUP
- Save & Close
- Save
- Recurring can create Recurring Activities, ie weekly Sales Meeting
- Cancel/Close

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 Activites, 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

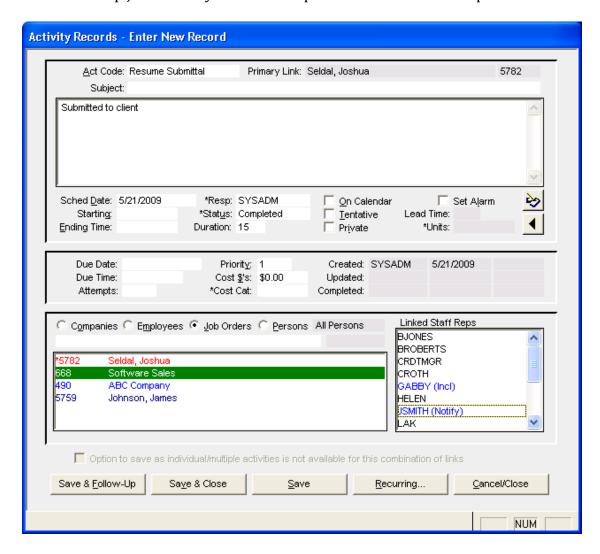
- Create a Manual activity from a candidate record
- Select activity code "Phone Call"
- Type in notes about the phone call that occurred (i.e., Spoke to Mike, great candidate)
- Mark Status off as Completed
- Save & Close the Activity
 - ✓ View Completed Activity in Candidate Activity Log



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



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.