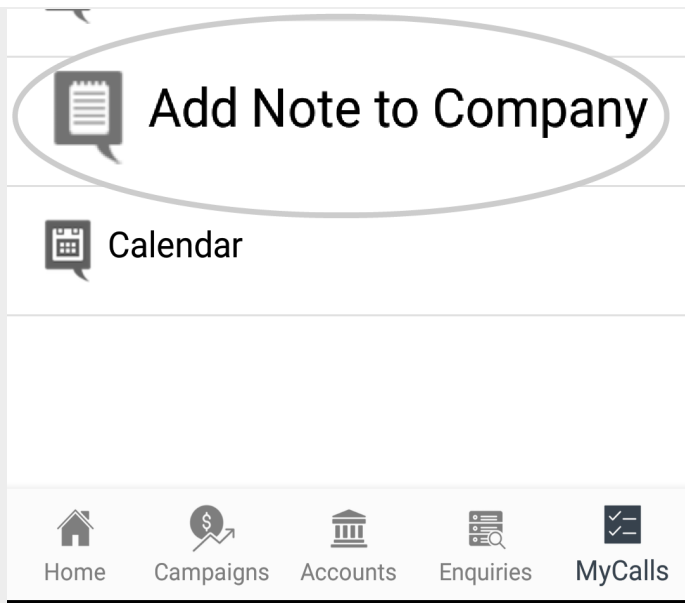
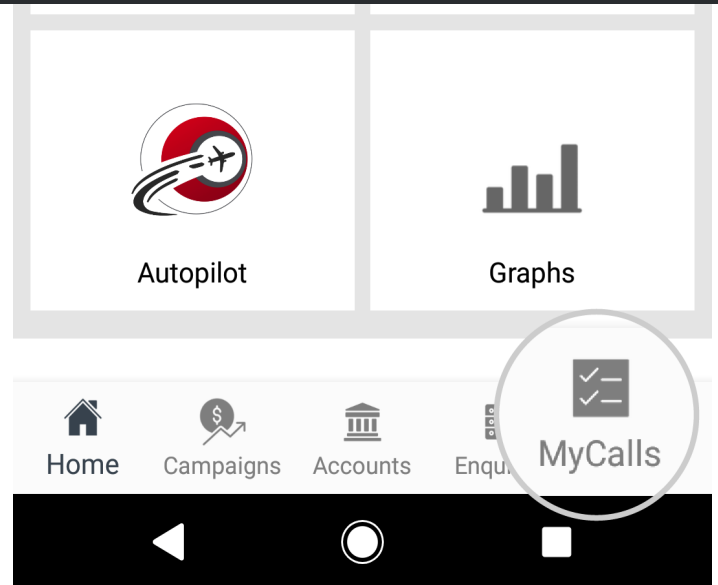


HOW TO ADD FUTURE APPOINTMENTS TO YOUR MYCALLS DIARY - ANDROID

This guide will show you how to use the follow up date to plan future appointments into your MyCalls diary. Planning your future appointments allows you to make the best use of your time and is integral for other features of the sales-i app (e.g. Autopilot and Maps).

01 From the bottom navigation menu, tap **MyCalls**.

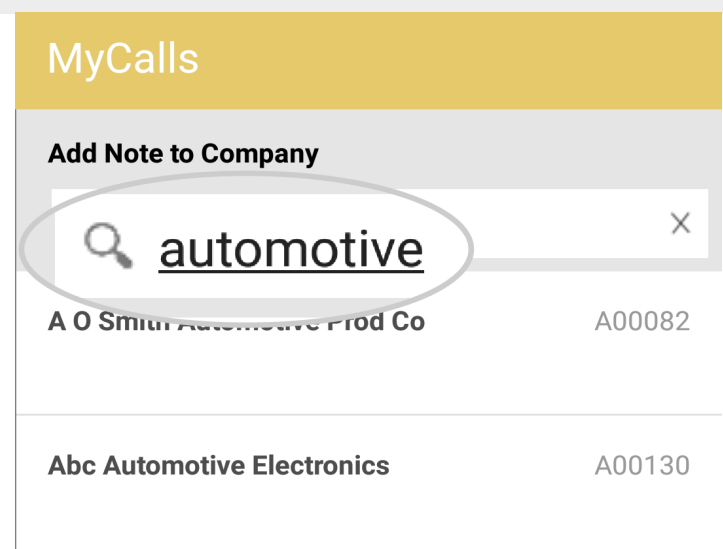


02 Tap **Add Note to Company** to search for an account.

Please Note: Accounts need to pre-exist prior to booking an interaction.

03 Search for your Customer or Prospect by typing the (full or partial) account name or number.

Then, select the desired Account from the results list.



Follow-up Actions

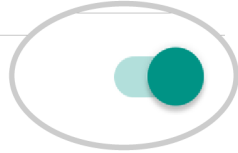
Next Action

--Please Select--

Use Follow-up Date

Follow-up Date

Monday, 30 July 2018, 10:40



04 Tap the **Follow-up Date** time & date selector box to schedule your next interaction with the account.

Please Note: If you can't see the time & date selector box you will need to toggle the **Use Follow-up Date** switch on.

05 Complete any other notes relating to this call (i.e. Future action/talking points).

When you are ready, tap the **Save icon** in the top right hand corner.

× Add Note



About This Call

Call Date

Monday, 23 July 2018, 15:40

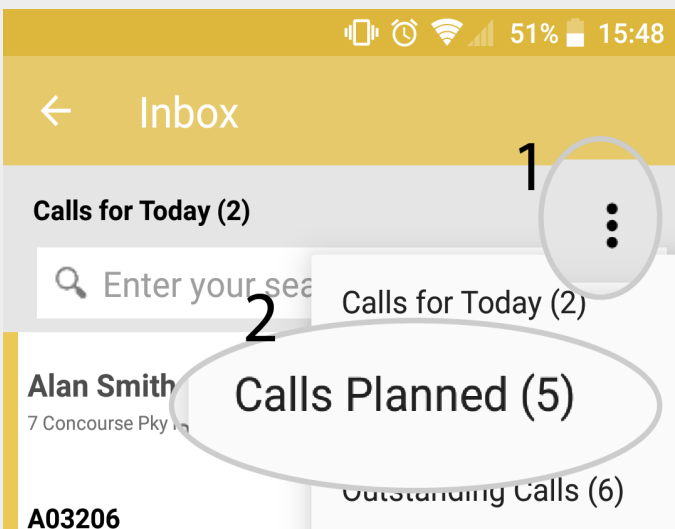
Call Duration (minutes)

-

30 minutes

+

Call Type*



06 You can view your booked interaction by tapping **Inbox**, followed by the **three dots icon** and then **Calls Planned**.

Alternatively, tap **Calendar** to view your planned calls on a specific date.

07 Our Microsoft Exchange/Office 365 integration tool allows you to seamlessly update both your sales-i and Exchange accounts at once.

It has been designed to allow contacts, emails and appointments to be viewable and editable within both your Microsoft Exchange/Office 365 email client and sales-i.

For more information on this service visit <http://www.sales-i.com/explore/overview/email-integration>

30 31 1 2 3 4 5

Move Calls

BERRY SMITH DEVELOPMENT LTD 09:25
sales-i auto generated call - from campaign 'Customer who bought cement BNB sand in the last 3 months (Rolling and...

DARYL INDUSTRIES LTD 15:30
Called to speak about promotion on Product X. Wants a demo on Products X, Y & Z. Product demo arranged with c...