



# SCHEDULED CALLS USER GUIDE

## OVERVIEW

The ability to schedule calls, tasks and appointments will help you organize your daily, weekly and monthly activities.

## HOW CALLS GET ON YOUR SCHEDULED CALL LIST:

### MANUALLY

#### Scheduling Calls Manually:

You can schedule a call from various modules within your CRM:

1. Contacts
2. Leads
3. Rainmaker

### CAMPAIGNS

Some of the Multi-Media campaigns in the Marketing Library include "Call Reminders" where calls will be automatically added to your scheduled call list in "Rainmaker".

### POST CLOSE

Six months after a loan closes a call reminder will be placed on your Scheduled Call List to remind you to touch base with your borrower. Good customer service doesn't end at the closing table and checking in is just good business. Making sure your customer has settled into their new loan without any problems can wow them and who knows, you may even get a referral.

## Setting up Scheduled Calls and Activities

Use the tools to the left of your contacts name to schedule your activities and log, or view, your responses.



*Click the "Flag" icon to set or remove a follow up.*



*Click the "Stopwatch" icon to log a response to an activity.*



*Hovering your mouse over the "Notepad" icon will reveal up to ten of the last responses logged.*

### Follow Up Options:

**Follow Up Type:** Choose a Task, Appointment or Scheduled Call.

**Title:** Give your follow up a name.

**Description:** Give your follow up a description.

**Schedule:** You can set your follow up for 15 minutes or up to 8 hours, or select a date and time.

**Recurrence:** There are many options for setting up Recurring follow ups.

**Recurrence end Date:** Use the calendar icon to set an end date for recurring follow ups.

**Alert By:** Receive an alert for your follow up by email, text or both.

**Scheduled Dial:** Have the system call you at the time of your follow up and give you the option to connect you to your contact.

**Misc:** Sync your follow up to your Outlook calendar.

## Viewing and Executing your Scheduled Calls

- From the Rainmaker module, click the Scheduled Calls link in the sub navigation menu to view your scheduled calls.
- Your calls for the current day will be displayed. You can use the Search By: fields to search for calls by First Name, Last Name, Calls Made or Source and the Date Range fields will allow you to search for past, or future calls.

**Scheduled Call List**

Logged in as Kristen Little

Calendar | Calculator | Alerts | Quick Add | Cart (1) | Log Out

Search By: Last Name | 10/30/2018 | 11/2/2018 | SEARCH | Reset | Download | Print

Clickable Icons: Log A Response | Report Notes | Create a Follow Up | Edit a Follow Up

	Name	Contact Info	Title	Source	Created Date	Scheduled Date	Last Attempt	Last Contact	Last Response	Next Call	Status
<b>A</b>	Katherine Garrity	H: 312-555-9771 E: katherine444@aol.c...	Consultation	Schedu...	9/17/18	11/2/18 12:00 PM				11/3/18	Pending
<b>B</b>	Jason Meaney	H: 254-423-4065 E: meaney.jasonp@hot...	Follow up	Schedu...	9/17/18	11/2/18 3:00 PM				11/3/18	Pending
	Katherine Garrity	H: 312-555-9771 E: katherine444@aol.c...	Consultation	Schedu...	9/17/18	11/1/18 12:00 PM				11/2/18	Pending
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	Katherine Garrity	H: 312-555-9771 E: katherine444@aol.c...	Consultation	Schedu...	9/17/18	10/31/18 12:00 PM				11/1/18	Pending
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	Katherine Garrity	H: 312-555-9771 E: katherine444@aol.c...	Consultation	Schedu...	9/17/18	10/30/18 12:00 PM				10/31/18	Pending
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## SOME OF THE TOOLS AVAILABLE ARE:

- Log A Response:** Clicking on the Stopwatch icon next to your contacts name will let you log a response to your call. This information will be reflected on your Scheduled Call List view under the Last Response column. You can also see your Last Attempt and Last Contact dates that populate when you log a response.
- Hovering your cursor over the Notepad icon will allow you to view up to ten of your latest logged responses.
- Create a Follow Up:** Clicking the “Flag” icon allows you to create a Follow Up Task, Appointment or Scheduled Call. You can schedule your follow up minutes or hours from now, or you can choose a date to follow up. You can also set up recurrences and reminder alerts and even set up a Scheduled Dial where the system will call you at the specified time and give you the option to be connected with your contact.
- Edit a Follow Up:** Click on the Pencil icon to edit a follow up. Clicking on your contacts Name will take you directly into their Contact record. Clicking on the email address will open your local email client so you can send them an email. You may also Download or Print your Scheduled Call List.

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