Activity Tracking Module

Course Companion

To take full advantage of the Activity Tracking and Management features in CDS, the **Activity Tracking/Management Mode** option must be selected on the **Activity** tab of the User Profile.

🔲 User Profile			
Misc. Information Proxy List Personal Information Security Infor		Investment	y Options
General Information Alarm Before Appointment (in mins) Alarm Before Callback (in mins) DayView Time Interval (in mins) Check Activity Collision Activity Tracking/Management Mode	15	Priority Color Coding Normal Urgent Important Tentative Others	
Show Activity Reason Show Activity Reports in Color AutoMove Filter	AUTOMOVE		

Figure 1: The Activity Options tab of the User Profile

This example will demonstrate the Activity Tracking and Management option for two activity types: Phone calls and appointments.

To complete a phone call using Activity Tracking:

- With the **DayView** of the CDS Calendar open, select a **Call** activity type in the **To Do List**.
- Click the **Dial Phone** button.

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Figure 2: The Dial Phone button in the Calendar tool bar.



The **Dialing** properties window will open. In addition, the Contact and SmartPad record of the contact linked to the activity will open in the background.

Description	Phone#	-
Business	(310)-839-3839#3453	
Fax	(310)-839-3840	
Residence	(626)-799-2951	
Spouse's work	(213)-208-0783	
Manual Dial	Call with Timer	

Figure 3: The Dialing properties window.

Note: The contact's preferred greeting and last name are listed above the list of phone numbers entered in CDS. The preferred name of the contact's spouse appears in parentheses.

- If the CDS dialer has been enabled to dial numbers for you, do not select the **Manual Dial** option. If the CDS dialer has not been enabled, select **Manual Dial**.
- Click the **Dial** button. During the call, the **Dial Phone** button will show the receiver off the hook to indicate a phone call is in process.



Figure 4: The active Dial Phone button indicating call in progress.

• The **Timer** in the bottom right hand corner of the CDS screen will start.



Figure 5: The active timer.

• The Contact and SmartPad records of the contact will become available for reference during the phone call.

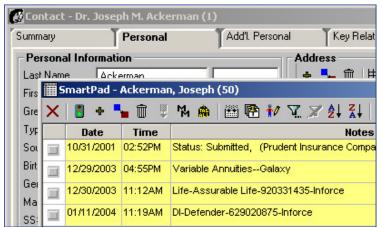


Figure 6: SmartPad and Contact records active during call.

• When the call is complete, click the active **Dial Phone** button or the **Stop** button on the timer.

• The Phone Call Outcome dialogue window will open.

	Phone-Call Outcome	
The Activity Information section includes basic information from the activity.	Activity Information 03/23/2004 Tuesday : M Joe Ackerman Joseph M. Ackerman, M.D., Inc. Schedule policy review	The Outcome section determines what follow-up information CDS will
	Outcome Contact Made Contact Not Made Contact Made	track based on the option selected: Contact Made or Contact Not Made.
With Contact Made selected in the Outcome section, the following options are available: Sale Made, Schedule	Sale Made Customer not Interested Schedule Appointment Call Completed Sale Made Ackerman, Joseph	
Appointment, Reschedule Call, Customer not interested, Other, and Call Completed.	Carrier Plan Name Benefit/FYC User Name DEMO	Fields for tracking data will be determined by the option selected in the Contact Made or Contact Not Made section. The fields for the Sale Made
Figure 7. The D	Reason OK Cancel Help	option are on display.

Figure 7: The Phone Call Outcome window – Contact Made option selected.



	Phone-Call Outcome	
	Activity Information 03/23/2004 Tuesday : M Joe Ackerman Joseph M. Ackerman, M.D., Inc.	
	Schedule policy review	
With Contact Not	Outcome C Contact Made Contact Not Made	
Made selected in the Outcome section, the following options are available: Reschedule Call,	 Reschedule Call Customer not Interested Call Discontinued Other. 	
Call Discontinued, Customer not interested, and Other.	Reschedule Call Date 03/23/2004	Fields for tracking data will be determined by the
	Time : M	option selected in the Contact Made or Contact Not Made section. The fields for the Reschedule
	Reason	Call option are on display.
	OK Cancel Help	

Figure 8: The Phone Call Outcome window - Contact Not Made option selected.

- Select the appropriate options for the outcome of the call.
- Click **OK**.
- If a schedule or reschedule option was selected, CDS will open an **Activity Detail** screen in order to add details to the new or rescheduled activity. If a sale was made during the call, CDS will prompt the user to enter sales data for more products if applicable.
- The information entered in the **Phone Call Outcome** dialogue window will be added to the SmartPad record of the contact linked to the activity and the **Activity History** section of the **Activity Detail** screen.

Action Date	Action Time	Contact	Outcome	User	Contact Status
03/25/2004	11:15AM	1	Sale Made - 1 st	DEMO	
03/25/2004	10:02AM		Activity Scheduled	DEMO	

Figure 9: The Activity History section of the Activity Detail screen.



To complete an appointment using Activity Tracking:

• When the appointment is completed, left click on the appointment in the CDS Calendar and click the **Mark Activity Done** button on the tool bar.



Figure 10: The Mark Activity Done button.

- Click **OK**.
- CDS will launch the **Appointment/Meeting Outcome** dialogue window.

	🔚 Appointment/	Meeting Out	come	×	
	Activity Informa	tion			
The Activity Information section	03/23/2004	Tuesday	04:30PM		
includes basic	Joe Ackerman	Joseph M	. Ackerman, M.D., In	IC.	The Outcome section determines
information from the activity.	Policy review				what follow-up
	Outcome				information CDS will track based on the
	Appointment Columnation	ompleted			option selected: Appointment
	C Appointment N	ot Completed			Completed or
With Appointment Completed selected in the Outcome	O Sale Made		C Other		Appointment Not Completed.
section, the following	Fact Finder Cor	mpleted	C Appt Complete	ed	
options are available: Sale Made, Fact	C Customer not Ir	nterested	🔿 Appt Discontir	nue	
Finder Completed, Customer not Interested, Other, Appt Completed, and Appt Discontinue.	Fact Finder Con Closing Intervie Schedule Closi Schedule Call f None Proposal Prepa Reason	w Scheduled ng Interview for Closing Inte			Fields for tracking data will be determined by the option selected in the Appointment Completed or Appointment Not Completed section. The fields for the Fact Finder option are on display.
	ОК	Cance	Help		

Figure 11: The Appointment/Meeting Outcome window – Appointment Completed option selected.

	Appointment/Me	eeting Outcom	e	×
	-Activity Informatio	on		
	03/25/2004	Thursday	03:15AM	
	Bob Antonsen	Antonsen Deve	lopment, Inc.	
	Initial life fact finder			
	Outcome Appointment Com Appointment Not			
With Appointment Not Completed selected in the Outcome section, the following options are available: Reschedule Appointment, Schedule Call for Appointment, Customer not Interested, and Other.	Appointment Not Reschedule Appo Schedule Call for Customer not Inte Reschedule Appo Date	Completed ointment C Appointment erested	Other	Fields for tracking data will be determined by the option selected in the Appointment Completed or Appointment Not Completed section. The fields for the Reschedule Appointment option are on display.
	ОК	Cancel	Help	

Figure 12: The Appointment/Meeting Outcome window – Appointment Not Completed option selected.

- Select the appropriate options for the outcome of the appointment.
- Click **OK**.
- If a schedule or reschedule option was selected, CDS will open an Activity
 Detail screen in order to add details to the new or rescheduled activity.
 If a sale was made during the appointment, CDS will prompt the user to enter
 sales data for more products if applicable.
 If a Fact Finder was completed, CDS will prompt the user to enter referral data, if
 applicable, obtained from the contact during the fact finder.
- The information entered in the **Appointment/Meeting Outcome** dialogue window will be added to the SmartPad record of the contact linked to the activity and the **Activity History** section of the **Activity Detail** screen.

Action Date	Action Time	Contact	Outcome	User	Contact Status
03/25/2004	11:54AM	1	New Activity Scheduled	DEMO	
03/25/2004	11:54AM		Fact Finding Done	DEMO	
03/25/2004	10:04AM		Activity Scheduled	DEMO	
		<u> </u>			

Figure 13: The Activity History section of the Activity Detail screen.