

# Activity Tracking Module

Client Data System

## 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.

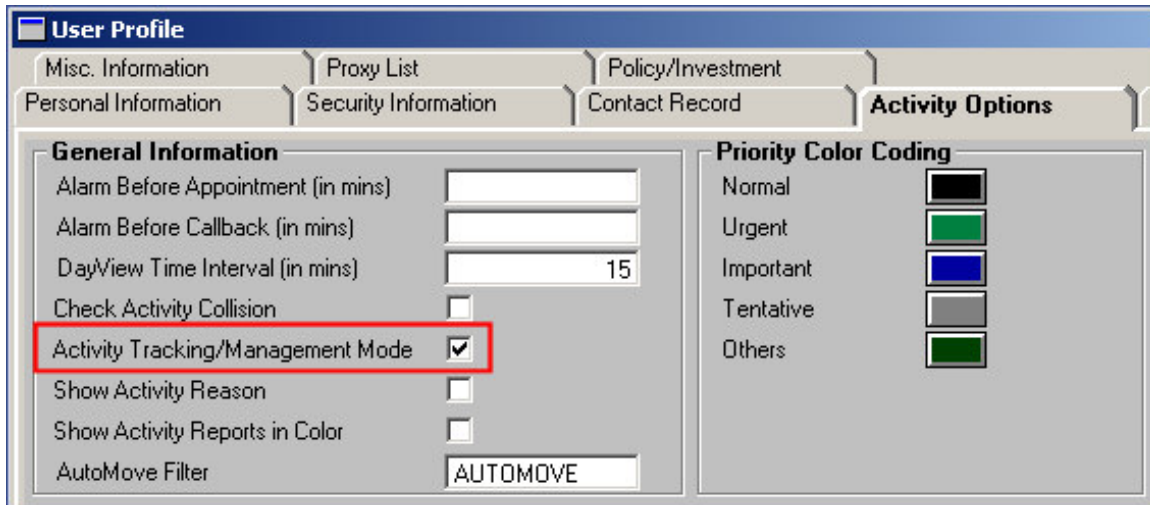


Figure 1: The Activity Options tab of the User Profile

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.

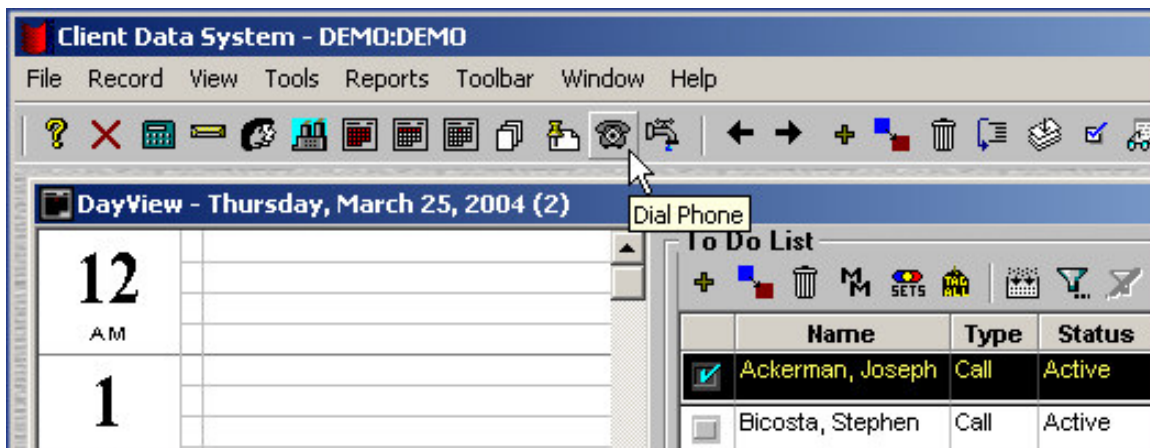
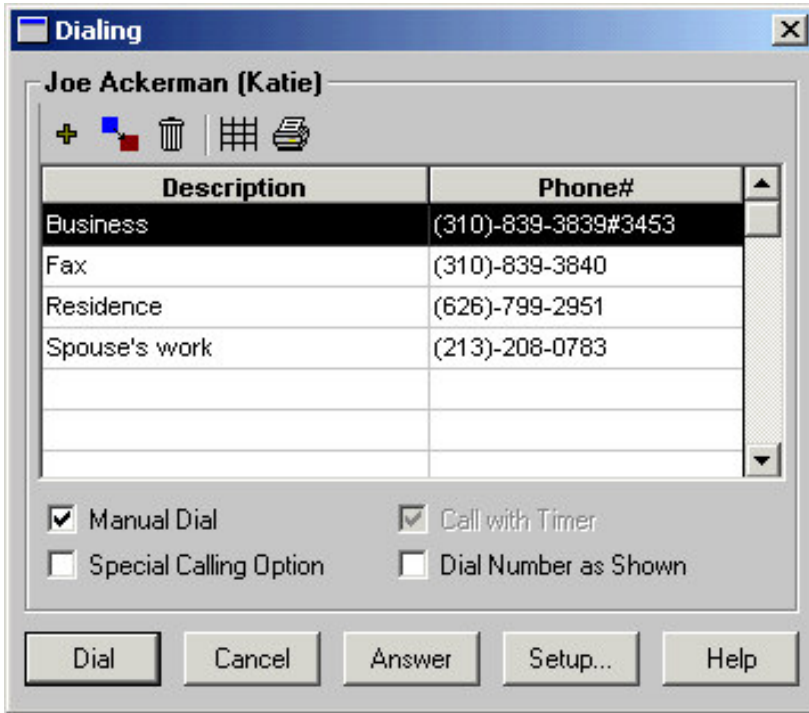


Figure 2: The Dial Phone button in the Calendar tool bar.

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.



**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.

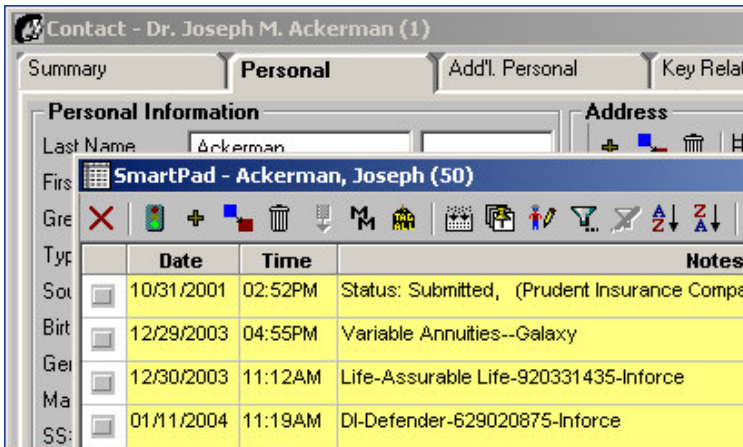


Figure 6: SmartPad and Contact records active during call.

- 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.

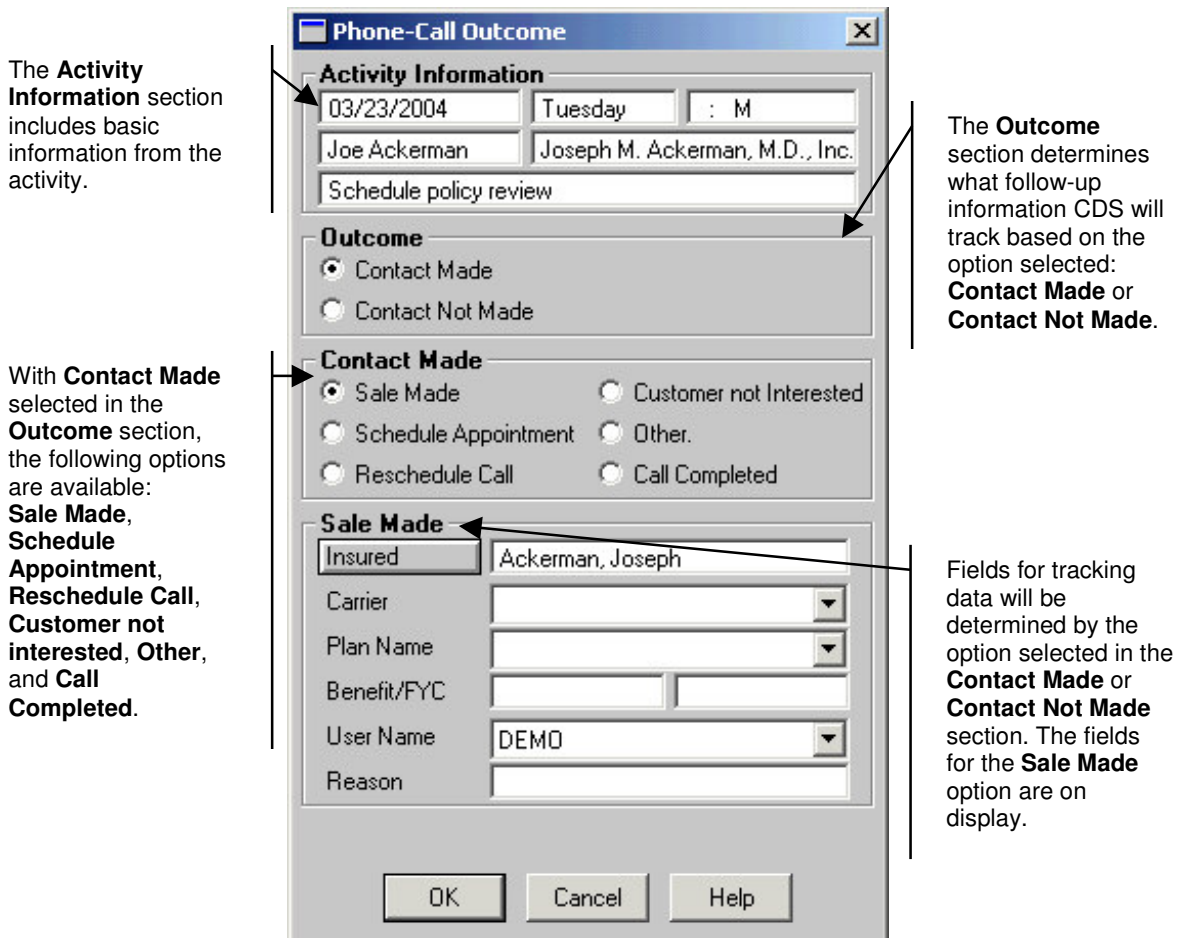
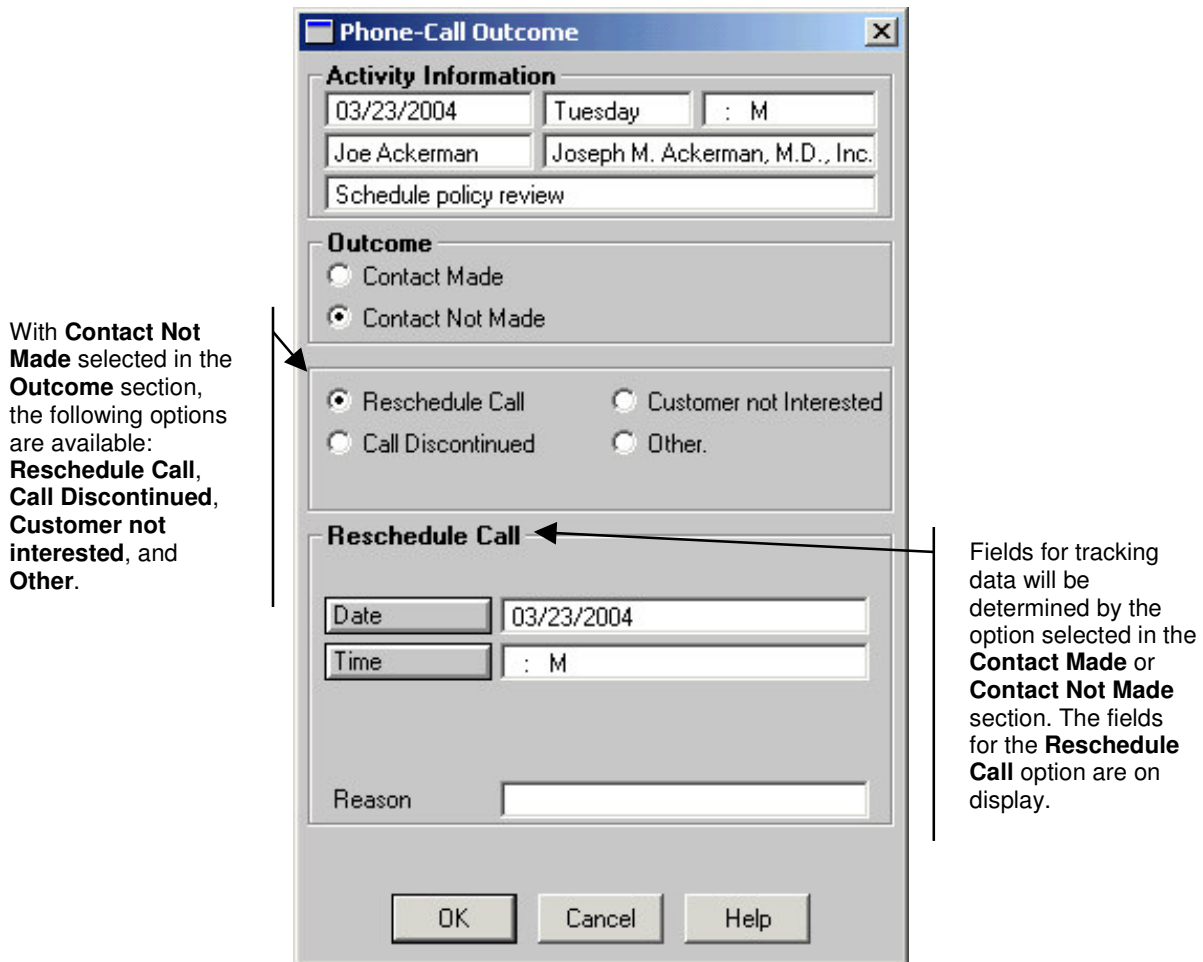
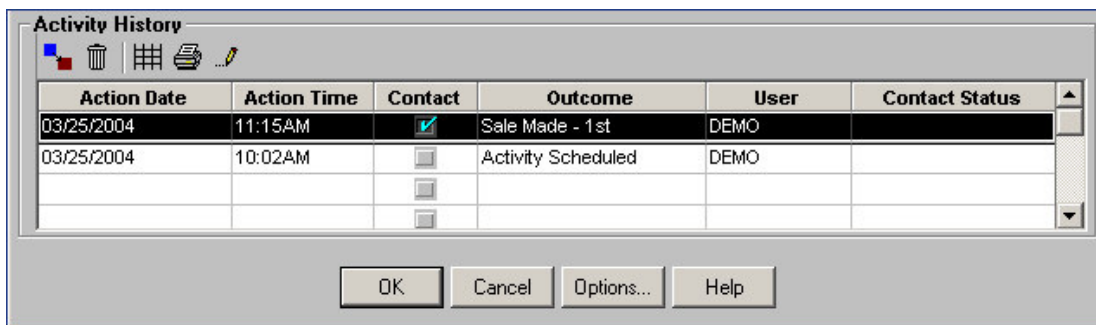


Figure 7: The Phone Call Outcome window – Contact Made option selected.



**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.



**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.

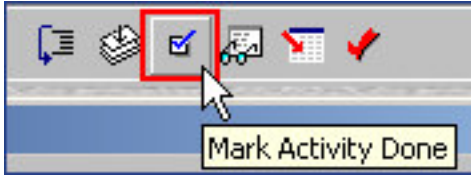


Figure 10: The Mark Activity Done button.

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

The **Activity Information** section includes basic information from the activity.

**Appointment/Meeting Outcome** [X]

**Activity Information**

03/23/2004    Tuesday    04:30PM

Joe Ackerman    Joseph M. Ackerman, M.D., Inc.

Policy review

**Outcome**

Appointment Completed

Appointment Not Completed

Sale Made                       Other

Fact Finder Completed               Appt Completed

Customer not Interested               Appt Discontinue

**Fact Finder Completed**

Closing Interview Scheduled

Schedule Closing Interview

Schedule Call for Closing Interview

None

Proposal Preparation Reminder

Reason

OK    Cancel    Help

The **Outcome** section determines what follow-up information CDS will track based on the option selected: **Appointment Completed** or **Appointment Not Completed**.

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.

With **Appointment Completed** selected in the **Outcome** section, the following options are available: **Sale Made, Fact Finder Completed, Customer not Interested, Other, Appt Completed, and Appt Discontinue.**

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

**Appointment/Meeting Outcome**

**Activity Information**

03/25/2004 Thursday 03:15AM

Bob Antonsen Antonsen Development, Inc.

Initial life fact finder

**Outcome**

Appointment Completed

Appointment Not Completed

**Appointment Not Completed**

Reschedule Appointment  Other

Schedule Call for Appointment

Customer not Interested

**Reschedule Appointment**

Date: //

Time: : M

Reason: \_\_\_\_\_

OK Cancel Help

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.**

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.

**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.



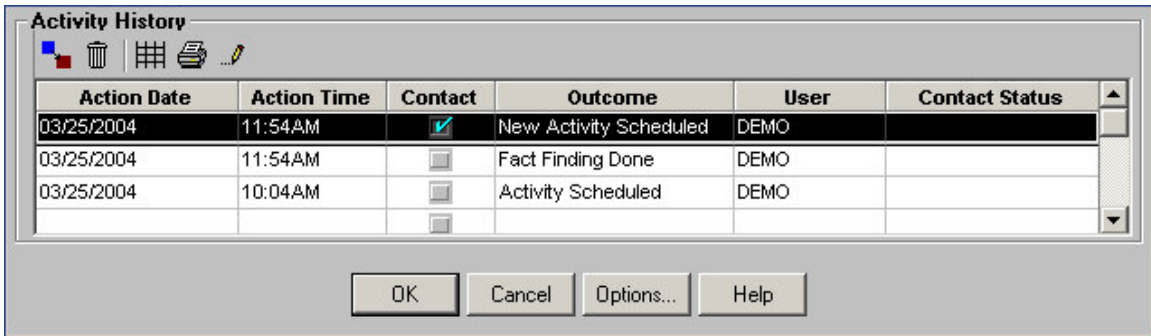


Figure 13: The Activity History section of the Activity Detail screen.