

Enterprise - Personal Call List

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What is the Personal Call List?

Depending on the amount of messages that are linked and logged within a contact record, it may only take a short amount of time before messages containing important sales information become buried or increasingly difficult to find. This is where personal call lists comes into play. The personal call list located within the contact record, is a place for sales people to document meetings or calls that would likely be classified as more important than a daily call or check in. Keeping meeting details in a separate window allows the information to stay visible:

The screenshot displays a CRM interface with two main sections. The top section is a 'messages' table with columns for Date, Action, Message, and Rep. The bottom section is a 'personal call list' window, which is highlighted with a red border. This window has a table with columns for Date, Summary, and Repname. To the right of the 'personal call list' window is a 'contact groups' section, which currently shows 'No Records Found'.

Date	Action	Message	Rep
7/25/2016	Email	Forklift Driver Available	dwood
4/27/2016	Email	Available to meet next week?	shawna.b
2/29/2016	LMTC	LM for Myra to call me, will try her this Thursday.	shawna.b
1/18/2016	Email	Candidates to Consider	shawna.b
1/18/2016	Message	Personal call summary: Meeting where we talked about nee...	shawna.b
1/18/2016	Cold Call Attempt	Myra was really busy, asked that I call her back Wednesday,...	shawna.b

Date	Summary	Repname
1/18/2016	Meeting where we talked about need for pi...	shawna.brادت

How to Add a Personal Call

From the visifile of the contact record, select the + icon from the personal call window. This will open the *add a personal call* form. Here, users can enter details discussed during the call/meeting, follow-up notes, and an overall meeting summary.

The screenshot shows a software window titled "add a personal call" with a blue header bar containing a question mark icon and a close button. The form is organized into several sections:

- Company Information:** Company Name (Vevea Manufacturing), Department Name (Primary), First Name (Myra), Last Name (Smith), Street (2316 2nd Ave.), City (Saint Paul), Office Phone (651-885-8451), Title (Hiring Manager), Repname (shawna.bradt), Date (10/20/2017 11:14:48 AM).
- Call Details:** Future Needs (Hiring needs are going to be picking up in November. Will), Commitment (after Myra signs our HTS contract), Follow-Up (Send Myra a list of candidates we've recently placed in), Other (Just got a new puppy, named Benny).
- Position and Objective:** Position (1st shift and 2nd shift machine operators), Objective (Discuss hiring needs and contract details).
- Info Discussed:** Pricing, skill sets we specialize in, our average turn around.
- Summary:** * Hiring Machine Ops in Nov, 1st and 2nd shift.
- Summary (cont.):** A text area for additional notes.

At the bottom right, there are two buttons: "Save" (with a floppy disk icon) and "New" (with a plus sign icon), both highlighted by a red box.

Select save to add the personal call, or select new to add the current personal call *and* to immediately open a new *add a personal call* form. Saved personal calls will also be documented as messages within the contact record:

Date	Action	Message	Rep	Contact	Cus
10/20/2017	Message	Personal call summary: * Hiring Machine Ops in Nov, 1st and...	shawna.bradt	Smith, Myra (Vevea Man...	
9/15/2016	Email	Contract	shawna.bradt	Smith, Myra	429
7/29/2016	Email	Checking in	shawna.bradt	Smith, Myra	429
7/25/2016	Email	Forklift Driver Available	dwood	Smith, Myra	778
4/27/2016	Email	Available to meet next week?	shawna.bradt	Smith, Myra	429
2/29/2016	LMTC	LM for Myra to call me, will try her this Thursday.	shawna.bradt	Smith, Myra (Vevea Man... Vev	

Date	Summary	Repname
10/20/2017	* Hiring Machine Ops in Nov, 1st and 2nd sh...	shawna.bradt
1/18/2016	Meeting where we talked about need for pi...	shawna.bradt

Searching Personal Calls

From the contact (1.) enhance search area, select the (2.) personal call category. From here, users can search all fields housed within the personal call form. Trainer Tip: Instead of entering search criteria, select (3.) "show in results" to add the field as a column in the results table. To limit the search results to contacts that are relevant to only you, set the (4.) recruiter name to match your service rep name in Enterprise.

1. Enhance Search

2. Personal Call

3. Show in Results

4. Recruiter Name

From the search results table, we can see that the columns (5.) call date, summary, info discussed, future needs, follow up, and position were added. Depending on the length of

your notes, you may only see a preview of text from the search results, however, users can (6.) hover over a field to see the full text.

Your search returned 39 results.

Drag a column header here to group by that column.

5.

Conta...	Last Name	First Name	Customer Na...	Active	Office Phone	Call Date	Summary	Info Discussed	Future Needs	Follow Up	Position
7440	Rodlie	Nelson	Sasquatch Steel	<input checked="" type="checkbox"/>	(651) 854-9998	6/24/2014 2:49:4...		Economy, Taxes.	Come September,...	Call me mid-august t...	Accounting Clerk. Bachelor's required.
7452	Ulim	Valerie	Sasquatch Steel	<input checked="" type="checkbox"/>	(651) 998-8855	7/8/2014 5:02:16...			will need 5 welder...	Call mid august to di...	TIG Welders
8559	Johanson	James	Dynamite Rese...	<input checked="" type="checkbox"/>	(651) 885-1111	10/10/2014 9:54:...			Come March, the...	Call him Feb 1 to disc...	Construction management, pipe fitters, ele
8565	Hanover	Martin	Dream Researc...	<input checked="" type="checkbox"/>	(651) 885-4444	10/16/2014 3:29:...		He got a new dog...	May need 10+ pe...	Call December 1 re o...	Cert. Forklift.
8571	Sontage	Linnea	Jack Links	<input checked="" type="checkbox"/>	(651) 444-5122	10/17/2014 1:41:...		Sara is going to b...	May be hiring 10...	Called after Christma...	Material Handlers.
8662	Swan	Henry	Kraken Calamari	<input checked="" type="checkbox"/>	(651) 885-8444	12/1/2014 2:00:4...	Meeting went gre...	Their biggest con...	10+ Forklift opera...	Call Jan 1 to schedul...	Certified Forklift Operators.
8671	Steward	James	Storage MN	<input checked="" type="checkbox"/>	(612) 888-4441	12/3/2014 2:05:0...	Hiring in Q2, wen...	they are unhappy...	hiring up to 10 w...	Call him Feb 1 re wel...	TIG Welder.
8675	Tyne	Geoff	Medical Health	<input checked="" type="checkbox"/>			Meeting went great, new machinists opps in 2015, 24 exclusive promised.		Hiring 3 RN's in Q...	Call Feb 1 to get a ful...	Rn's.
8693	Dieter	Gregory	Oz Hotels	<input checked="" type="checkbox"/>	(651) 999-4111	12/9/2014 4:32:5...	Meeting went gre...		Will be hiring 10+...	Call him March 1 to l...	Machinists.
8855	Frank	Jane	Polar Printing	<input checked="" type="checkbox"/>	(651) 222-1122	2/11/2015 2:05:5...	Hiring 10 machin...		Hiring 10+ machi...	Call April 1 to discuss...	Machine Operators, 2nd shift.
8868	Gellner	Harold	Hats & Caps	<input checked="" type="checkbox"/>	(612) 232-3331	2/20/2015 1:34:1...	Has 10 machine o...			Call him April 1st to...	Machine Operators
8875	Turnksy	Vail	Tile Manufactu...	<input checked="" type="checkbox"/>	(651) 222-1231	2/24/2015 3:21:0...	Hiring people in...		Hiring 10 forklift...	Call April 1st.	Certified Forklift drivers. Second shift.
8932	Drier	Hans	Rove Inc.	<input checked="" type="checkbox"/>	(651) 888-4444	4/8/2015 3:08:51...	5 CNC Machinists...		Hiring 5 machinis...	Call at end of May to...	CNC Machinists.

6.

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