Retreat. Explore. Discover. Learn.

Using Activities to Manage Your Day

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Learn how to use activities (Notes, Reminders and Mailers) and the Activity Manager to create efficiency, increase productivity and enhance customer relationships. Let's answer these questions:

1. What are ClientBase Activities?

2. How do I create a Reminder? A Note? A Mailer?

3. Where is the To-Do List in ClientBase and how do I use it?

4. Where is the At-a-Glance Calendar in ClientBase?

5. How do I use the Level 1 and Level 2 Queries in the Activity Manager to search for any activities?

6. How do I create folders with selected columns and sorts in the Activity Manager?

7. How do I create multiple Notes/Mailers/Reminders at one time?

1. What are ClientBase Activities?

ClientBase activities are defined as Notes, Reminders and Mailers. These all are found in the client profile, and can be created either in the profile itself, in the Profile Manager, or in a Res Card. These are managed in the Activity Manager.

Create a Reminder: Click the *Remind* icon to create an future task such as following up on a brochure sent to a client. Reminders appear on a daily To-Do list in the Activity Manager or on a daily calendar, At-a-Glance. Created Reminders are attached to a client's profile and Res Cards, and are available for reports by using the Activity Manager.

Create a Note: Click the *Note* icon to create a note documenting any contact you've had with a client such as a client question or concern. Notes are attached to a client's profile in the Activity Tab and to Res Cards, and are available for reports by using the Activity Manager.

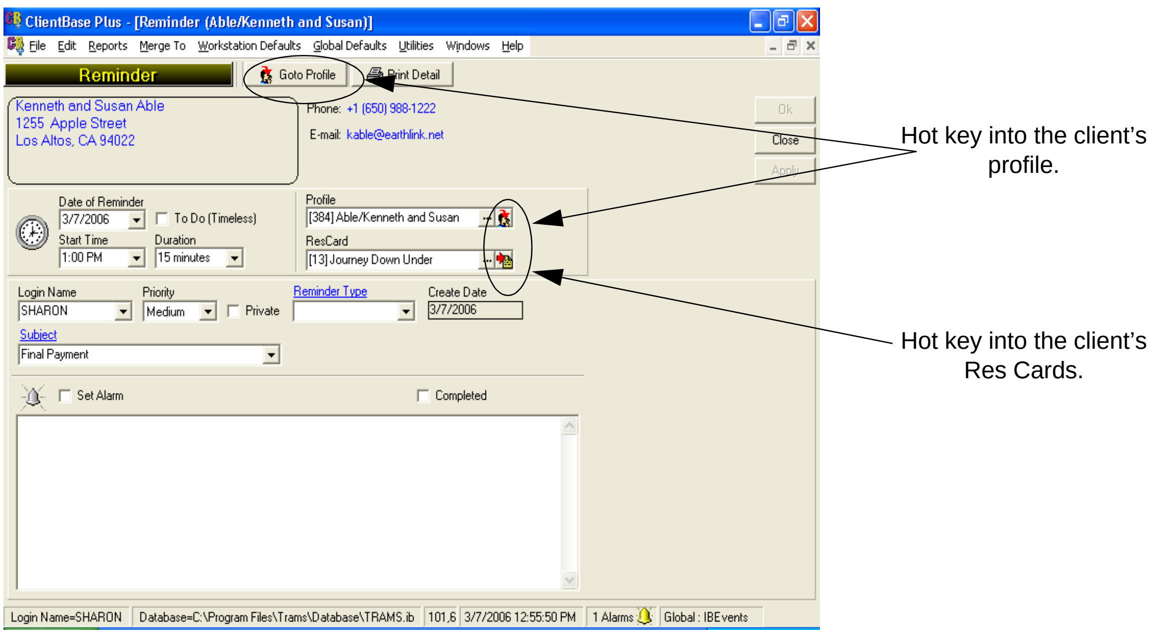
Create a Mailer: Click the *Mailer* icon to create a mailer (history) of something you've sent to a customer; for example, a birthday card or a ski trip promotion. By entering the date, time, and subject of the mailer, the history appears within the profile's Activity Tab, in Res Cards, in the Activity Manager, or on reports.

2. How Do I Create a Reminder?

Reminders allow you to schedule future tasks. Sharon, an agent, creates a *Reminder* to call Clara Adams next week to perform a trip inquiry follow-up. Joan, another agent, creates a *Reminder* to check on documents for Hank Adams. Mindy, yet another agent, creates a *Reminder* to welcome the Andersons home from their Hawaii honeymoon.

Reminders are created and attached to a client profile. (You can also create reminders in and attach them to a Res Card, but these also "live" in the client profile). Any profile or Res Card can have any number of reminders attached to it. All reminders created appear on a daily To-Do list located in the Activity Manager, or on the At-a-Glance Calendar.

REMINDER ENTRY SCREEN IN A CLIENT'S PROFILE



<u>Reminders can be accessed from a variety of areas in ClientBase:</u>

- Create a reminder by highlighting the client profile from a Profile Manager query. Click *Remind* icon on the toolbar. Make sure to check *Selected Results* in the *Include Records in Profile Manager* field to create for just one profile.

- Within a client profile, create a reminder from any folder by clicking *Remind* on the toolbar.

- In the client profile, under the activity tab, there are three buttons to the right of the results screen. Click *Add* to enter a new reminder; *Modify* to change or enhance a reminder; or *Delete* to remove a reminder.

- Click **File|New|Reminder**. Make sure to check *Selected Results* in the *Include Records in Profile Manager* field to create for just one profile.

- To create reminders for a new trip (such as reminders for first deposit, final deposit, check for documents, etc.), click the activities tab in the Res Card, and then *Add*. These reminders can be viewed from inside the activity tab in the Res Card and in the client's profile. (You can also create these reminders all at one time by click *Batched Reminders.)*

Use Reminders as a CRM Tool:

**Keep a record of all contacts with clients inside their profiles

**Work off a to-do list to organize your day

**Using CRM, use reminders to keep in constant contact with customer

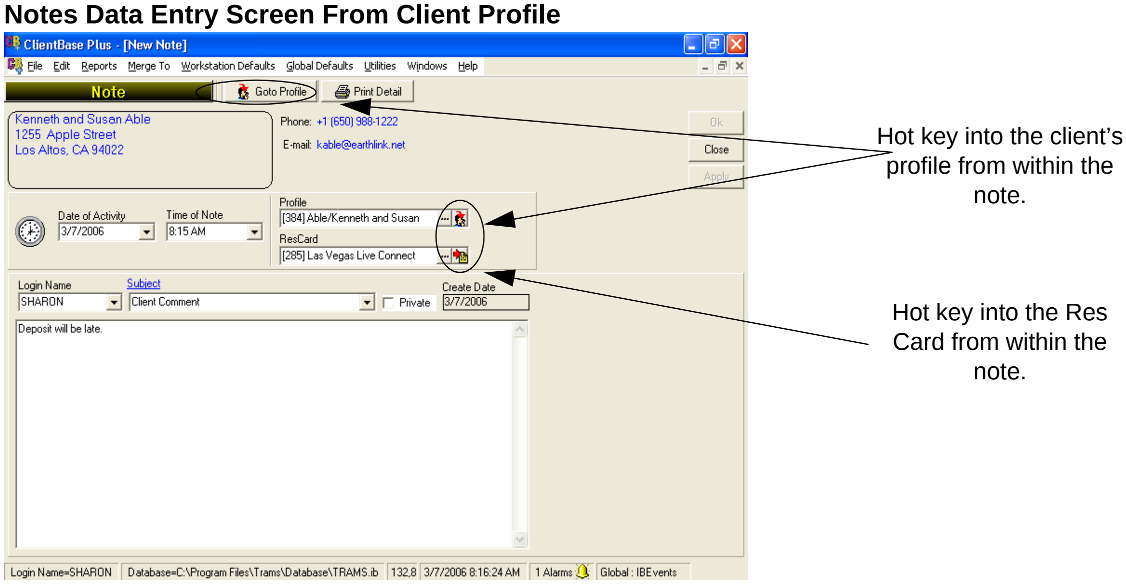
**Run activity reports to keep track of your effectiveness in Establishing & Maintaining Customer Relationships

How to Create Notes

Each time a contact is made by the agency with your customer, valuable information is received. These contacts should be documented in the form of a *Note*. A *Note* in ClientBase is contained within a client profile and is similar to a "post-it note," complete with date of contact, user login and remarks.

A profile or Res Card can have any number of notes attached to it, but even if you create the Note in a Res Card, it still "lives" in the client profile. This allows any agent interacting with the customer to view all past contacts. For example, Clara Adam's calls the agency saying she will be late with a final deposit.

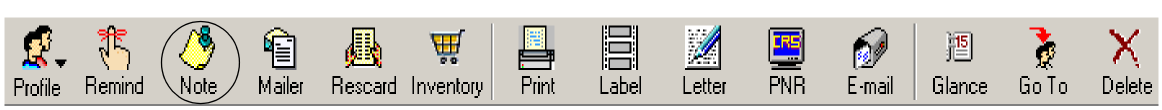
Notes Data Entry Screen From Client Profile



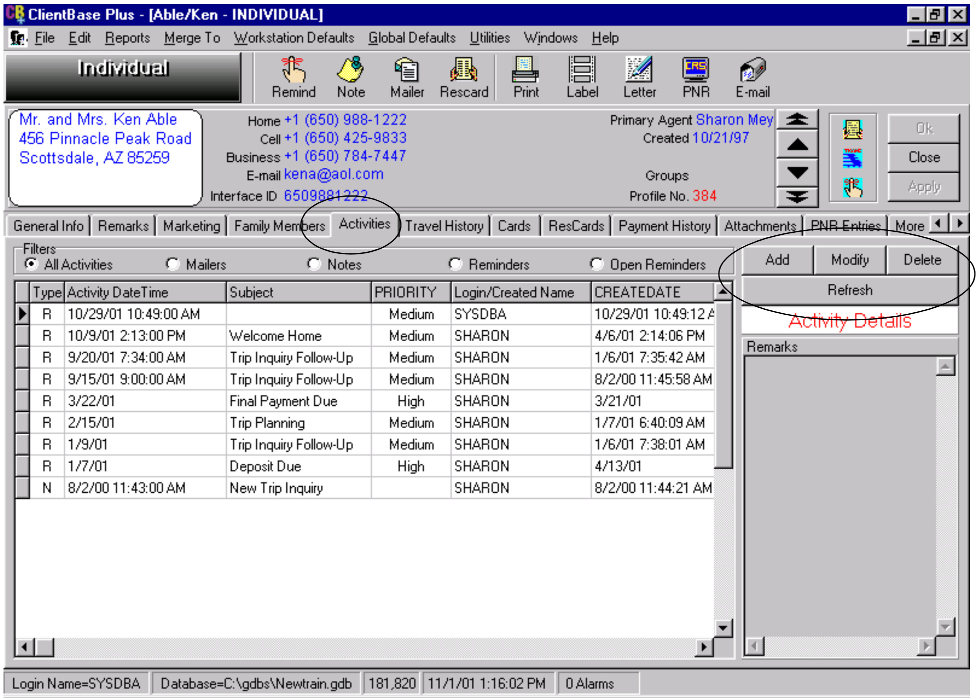
Notes can be created from a variety of areas in ClientBase:

- Create a note by highlighting the client profile from a Profile Manager query in ClientBase's main screen. Click *Note* on the toolbar. Make sure to check *Selected Results* in the *Include Records in Profile Manager* field to create for just one profile.

- Within a client profile, create a note from any folder tab by clicking *Note* on the toolbar.



- In the client profile, under the Activity Tab, there are three buttons to the right of the results screen. Click *Add* to enter a new note; *Modify* to change or enhance a note; or *Delete* to remove a note.



- Create a new note by clicking **File|New|Note**. Make sure to check *Selected Results* in the *Include Records in Profile Manager* field to create for just one profile.

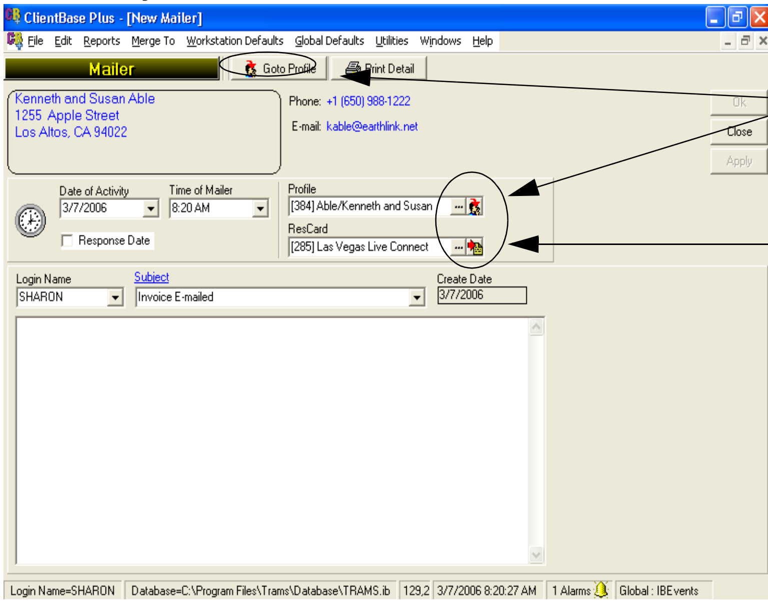
- After clicking *New*, select *Note* from the submenu.

- Create a new note in a Res Card. Under the *Activities* tab, click *Add* to create a note. These notes can be viewed from inside the Res Card, or from the activity tab in the client's profile.

How to Create Mailers

Agent Sharon wants to handle Clara Adams' trip inquiry to Alaska by mailing her a Princess brochure. Sharon decides to print out a label to put on the envelope, and print out a brochure cover letter from the document templates along with a label. Mailers provide tracking capability for every printed communication your agency sends to clients using document templates, labels or e-Mail. As with notes and reminders, mailers are created and attached to a client profile or Res Card. Any profile or Res Card can have any number of mailers attached to it.

Mailer Entry Screen From Within a Client Profile



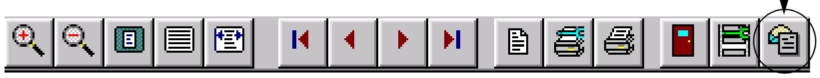
Hot key into the client's profile from within the Mailer.

Hot key into the Res Card from within the Mailer.

Mailers can be created from several different areas in ClientBase:

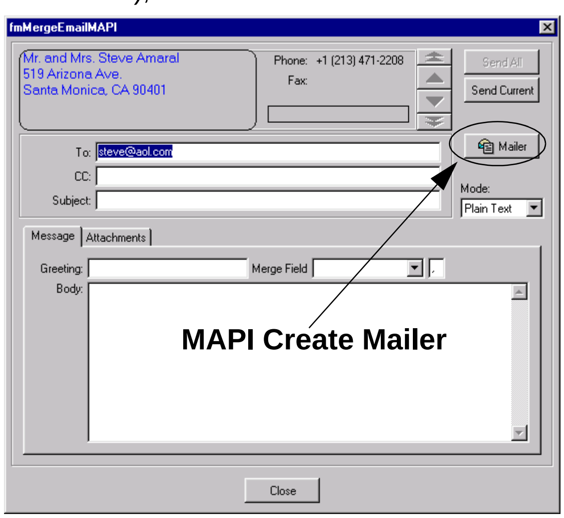
- ***While printing labels:*** When you click the *Print* icon, you are prompted to create a mailer. Always click *Yes.* Or, from the label preview screen (whether for one label or multiple labels), click the *Create Mailer* icon to create mailers for all of the results before printing.

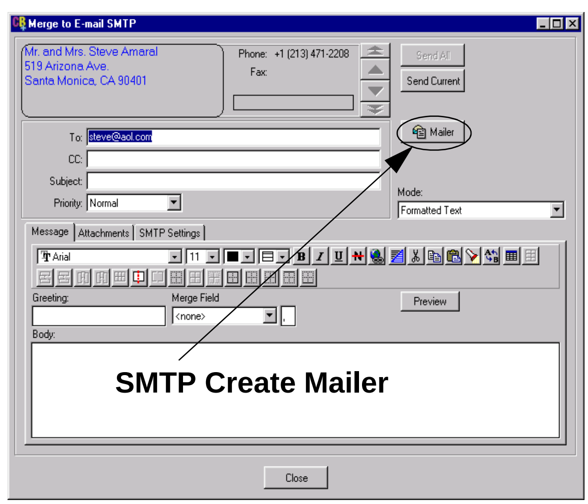
Create Mailer



- ***While printing letters:*** When you click the *Print* icon, you are prompted to create a mailer. Always click *Yes.* Or, from the document template preview screen (whether for one letter or multiple letters), click the *Create Mailer* icon on toolbar to create mailer before printing.

- ***While sending e-mails:*** From the e-mail preview screen (whether for one e-mail or for multiple e-mails), click the *Create Mailer* icon in toolbar to create mailer before printing or sending.





Each mailer contains a notation to the body so that it is clear from the Mailer history what was sent via E-mail including the body of the message and any attachments.

Or you can create a single Mailer record by doing one of the following:

- Click **File|New|Mailer**. Make sure to check *Selected Results* in the *Include Records in Profile Manager* field to create for just one profile.

- Create a mailer by highlighting the client profile from a Profile Manager query. Click *Mailer* on the toolbar. Make sure to check *Selected Results* in the *Include Records in Profile Manager* field to create for just one profile.

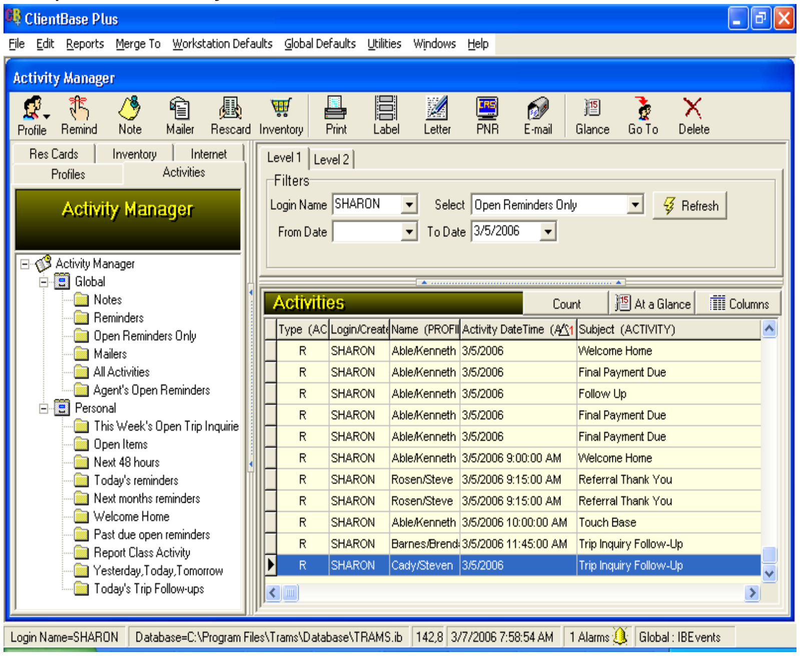
- Within a client profile, create a mailer from any folder by clicking *Mailer* on the toolbar.

- In the client profile Activity Tab, there are three buttons to the right of the results screen. Click *Add* to enter a new mailer; *Modify* to change or enhance a mailer; or *Delete* to remove a mailer.

- To create mailers a new trip (such as sending an e-mail containing the Invoice), click the Activities Tab in the Res Card, and then *Add*. These mailers can be viewed from inside the Activity Tab in the Res Card and in the Client's Profile.

3. Where is the To-Do List in ClientBase?

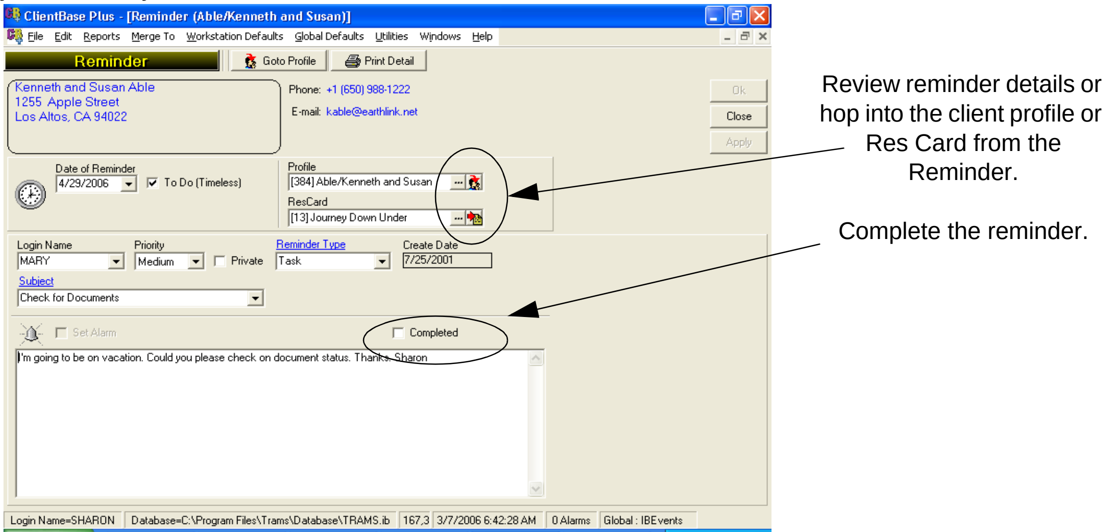
After you begin using Reminders (or Notes and Mailers) to document vital customer contacts, start each work day by signing into ClientBase and clicking the *Activities Manager* tab where your "To-Do" List is located. By default, ClientBase queries the database for the user login's open reminders and the results screen immediately displays a list of the reminders (or tasks) the agent needs to complete each day.



How Do I Use the To-Do List?

a) Prioritize your list by putting high priority items first - work these first.

b) Once in the reminder, review details, or hop into the profile or Res Card if you need to refresh your memory about client.



c) Complete reminders by putting a note in the *Remarks* area for reference, and checking *Completed.* Refresh your To-Do list to take that item off the list for today.

d) Put a new follow-up date on the reminder if you cannot complete it with remarks, or close out of a reminder and create a new one. (Our suggestion is to create new reminders for reporting purposes. You will learn to do this in your class *Closing More Sales Using ClientBase.)*

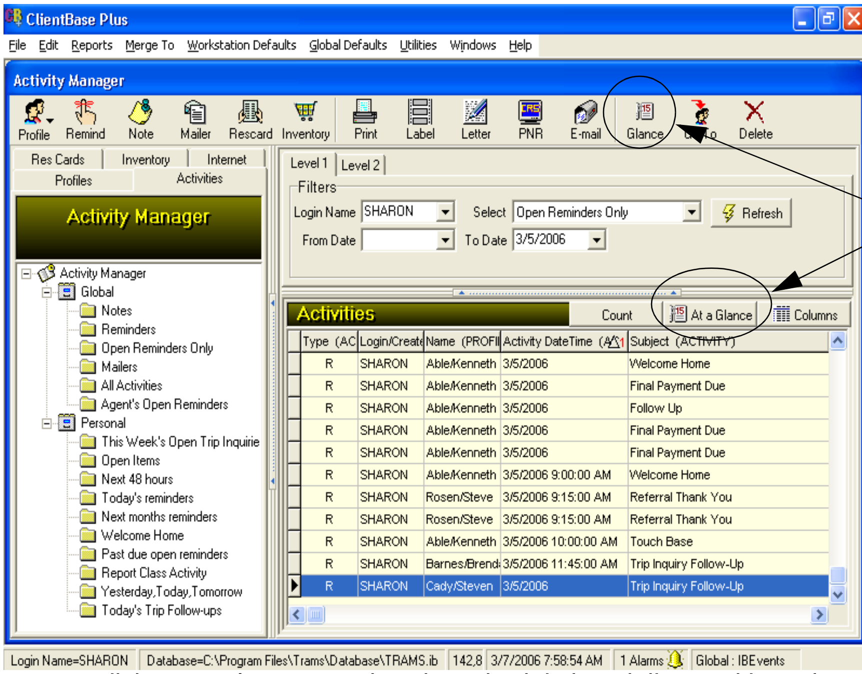
e) Suggest for VIP's to schedule 4 - 6 reminders a year.

f) If another agent is absent, you can work his/hers To-Do List as well.

g) A reminder attached to your agent profile can be used to schedule personal reminders such as a medical appointment.

h) A reminder attached to a vendor profile can be used to schedule such things as ordering brochures.

4. Where is the At-a-Glance Calendar in ClientBase



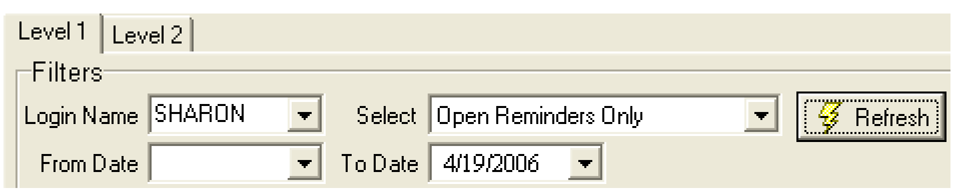
At-A-Glance can be accessed by clicking the icons on the Toolbar, or directly above the Results Screen. You can also click *Windows|At-a-Glance* from the file menu items.

Click *At-A-Glance* to review the schedule in a daily, weekly and monthly planner format. User logins have their own *At-a-Glance*, and each *At-a-Glance* can only be viewed while logged in as that user. The *Day-At-a-Glance* displays today's date and is divided into fifteen-minute time increments for any appointments or calls scheduled for the day. These time/duration reminders are marked by you within a specific time frame when they are created. The reminders checked as *Timeless To-do's*, appear on a list at the right hand side of *At-A-Glance.*

5. How Do I Use the Level 1 and Level 2 Queries in the Activity Manager to Search for Any Activities?

Use the Activity Manager to find any Note, Mailer or Reminder, or run reports using the activity fields as the selection criteria. At the top of the results screen, notice tabs marked Level 1 and Level 2. An agent uses the Level 1 and Level 2 Query filters to access Notes, Reminders and Mailers that have been created and reside in the client profiles. These queries can be quite valuable as productivity and management tools.

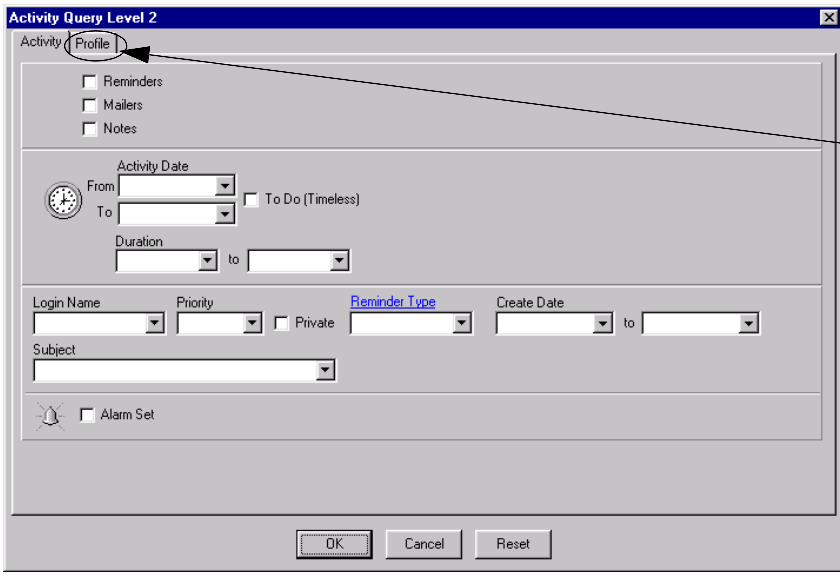
Level 1 Activity Manager Query



The Level 1 Activity Manager query contains four fields which are strung together with an "and". (Another way of saying this is that **All** fields are evaluated to form the results of the query.) In the example above, the query is setup for Sharon *and* Open Reminders Only *and* From and Date *and* To Date 4/19/2006. After setting up the selection criteria, and clicking *Refresh*, the query results appear in the results screen.

Level 2 Activity Manager Query

The Level 2 Query area of the Activity Manager provides the ability to query the database of Notes, Reminders and Mailers by virtually any field captured in these records, and includes the ability to query by a particular client as well. Track the type of marketing tasks scheduled, when and if they have been completed, which agents are completing them, the mailings that are being sent and the response to those mailings. The options are endless.



Note: Use general profile data as filters as well. Query Activities for a particular client and print the results.

6. How Do I Create Folders with Selected Columns and Sorts in the Activity Manager

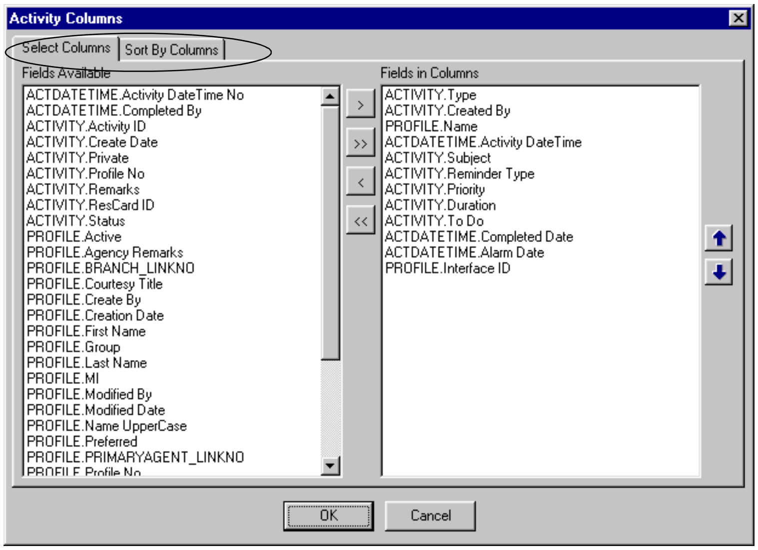
As you can see, queries run in the Activity Manager can become quite complex. With all the available filters in Level 1 and Level 2 queries, you can view any list of marketing activities performed (or not) within the agency. With this in mind, if there are certain queries that to run often, we suggest you save the query filters after setting them up. This is called saving a query to a folder. That way, the next time you run a saved query, all you do is click the saved folder. One click and your query filters are completed automatically.

Here are some steps for saving a query:

1) Using Level 1 and Level 2 filters in the Activity Manager, run your query (use date formulas, if applicable).

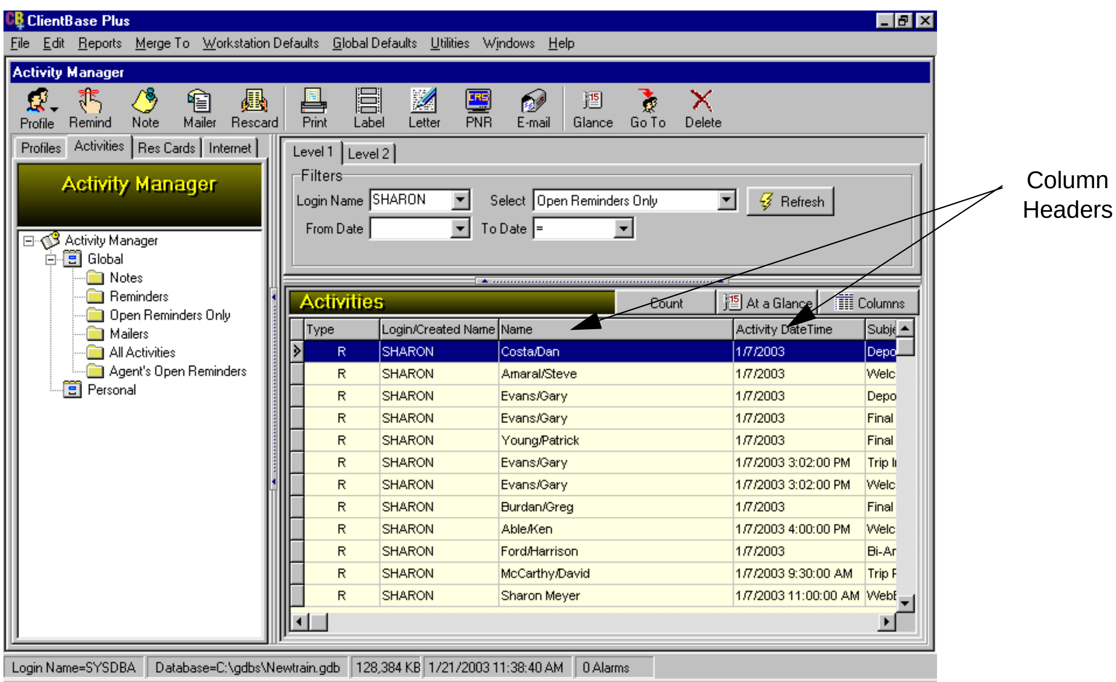
2) To customize the columns used in the query, click *Columns* on the Activity Manager results

screen.



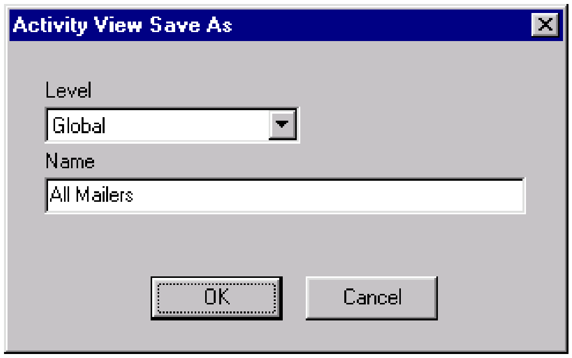
If you would like to change a column, move the highlighted column over to the other side by using the **>** or **<** arrow. By using the shift key and mouse, select as many consecutive entries as you want to move and use the **>>** or **<<** arrows. By using the control key and your mouse, select non-consecutive entries to move. Use blue **Up** and **Down** arrows to order the selections. To sort up to 3 columns in ascending or descending order, click *Sort by Columns.*

Arrange and size the columns in the query by inserting your mouse between the column headers (see a bi-directional arrow), hold down the left mouse button, and pull the columns to the new size.



To move a column to a different location quickly from the results screen, hold the mouse over the column in the column header you want to move (see a vertical line extending down). Press the left mouse button and pull the column left or right to its new location. To "quick" sort results, hold down the shift key and click the column header to sort by. A triangle in the up position appears within the header signifies ascending order, while a triangle in the down position signifies descending order.

3) When satisfied with the query results, click **File|Save Query As**. The following screen appears:



4) From the drop-down *Level* menu, choose whether to save query as *Personal* (for your own use only), or as *Global* (for the use of everyone in the agency).

5) Name the query.

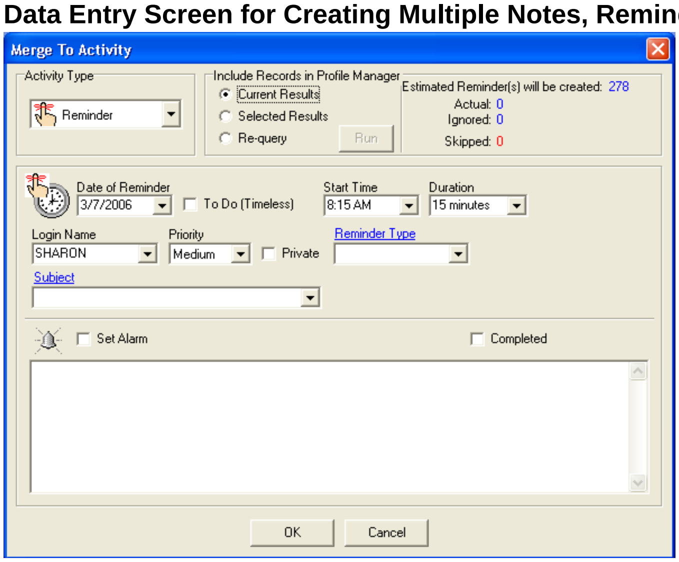
6) Click *OK*. See the new query located on the left hand side of the Activity Manager screen.

Note: ClientBase saves the filters and results layout you have selected, **not** the query results. The next time you use the saved query, any new data that has been added since it was created, is included in the new query.

7. How Do I Create Multiple Notes, Reminders, or Mailers at One Time?

In ClientBase you can create multiple notes, reminders, or mailers at one time for profiles. Using Level 1, 2 or 3 query filters, find the profiles for which you want to add a note or reminder or mailer for, and click the *Note, Reminder,* or *Mailer* icon on the toolbar, or go to **File|New.**

Data Entry Screen for Creating Multiple Notes, Reminders, or Mailers



Select the *Activity Type,* select *Current Results* (all records in results screen); *Selected Results* (the current record or previously selected records); or *Re-Query* to find the desired records. The *Date, Time of Note,* and *Login Name* default. Select a *Subject* from the drop-down menu. When clicking *OK,* the activity is created for all selected records.

How to Multi-Select Records

To multi-select records from the results of a query, use the <CTRL> key in combination with a mouse click. Notice one of three symbols next to each profile as you push <CTRL> and click it:

a) Bullet - this profile has been selected.

b) Bullet and Bracket - this profile has been selected and is the current profile record your cursor is focused on.

c) Solid Triangle - this profile has NOT been selected as part of the multi-select, but is the current record your cursor is focused on. <CTRL> Click once to get the bullet and bracket, and a second time if you choose not to include in the multi-select. You can also use the main edit menu or right-mouse click in the results screen to *Select All, Unselect All,* or *Invert* the results.

Notes: