Sales Agent Daily Task and ACT Routine

The following are Daily Tasks and a Sales Agent's ACT Routine. While it is the daily procedures, things may change and you should be able to adapt to such changes

1.Click on TASK List

2.Choose Today, Past or All Tasks to view your list of Tasks (activities)

3.Click once on Blue and Underline name or double click on black writing to open information of task.

4.Get an overview of the customer before completing activity by …

a.Check ACTIVITIES of customer, by clicking on Activities Tab

b.Check OPPORTUNITY of customer, by clicking on Opportunities Tab

c.Check History of customer, by clicking on History Tab.

5.Complete or do Task (activity) for customer.

6.Once done, clear Task (activity) by

a.Clicking on little white box on left of Task (activity) or

b.Right click on the activity and choose clear activity.

7.All customers/task must have a follow up – so click on follow up.

a.Select follow up date.

b.Select follow up time (tab) – times should be in multiples of 5

c.Duration should be 5 minutes.

d.Check fields to make sure you have created follow up for correct customer.

e.Enter number of task in Regarding Field and enter what you have to do for follow up.

f.Change priority if required

g.Create an alarm if required

h.Schedule for someone else if required.

i.Press OKAY twice to get out of clear Activity.

8.Check if the customer has an **OPEN OPPORTUNITY.**

a.All customers have an OPEN OPPORTUNITY.

o have an OPEN OPPORTUNITY, amend the opportunity if required then go back to **STEP 1 and start the process again.**

o not have an OPEN OPPORTUNITY, create a new opportunity by following the steps of creating a NEW OPPORTUNITY.Make sure that all Opportunities have a Product/Service added.Once the opportunity is created – click **SAVE** and return to **STEP 1 and start the process again.**

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