Activities

What to write in the Details Box of Clear Activity Page

What are the important things to remember to write in the **Details Notes Box** of the Clear Activity Page.

There are four main things that you should enter in the **Details Box** of the Clear Activity Page.

1. The number you tried to dial
    1. (eg: CLD work)
    2. (eg: CLD mobile)
    3. (eg: CLD cust direct line or CLD cust DL)

        1. you can write something above or you can copy and paste or write the number you called when making the call
        2. (eg: CLD +612 8966-3360)
2. The name of the person who answered the phone or you spoke to.
   Important: spk means spoke.
    1. (eg: spk to Jeanette (sec)) if you spoke to the secretary
    2. (eg: spk to cust) if you spoke to the customer
    3. (eg: spk to sec did not give me her name) if you spoke to the secretary but she never mentioned her name.

3. Detailed information of what the recipient (customer) said and what you said and or offered.
    1. (eg: if the call was transferred)
    2. (eg: what the customer said or you provided)
4. remember you are not writing a history only for you to read. it is history of what you did for the caller. All histories need to be easy to read and understand.

As an example, this is what one detailed note would look like.

CLD work spk to Barbara (sec) who said cust was busy.Â Sec said to send email and she will pass it on.Â Agreed to send email and confirmed best email address.Â Email Sent and will follow up in 2 days to check if cust received it.

Attached files:

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