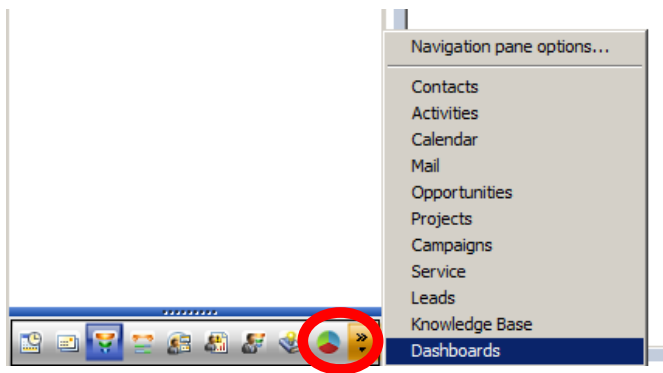


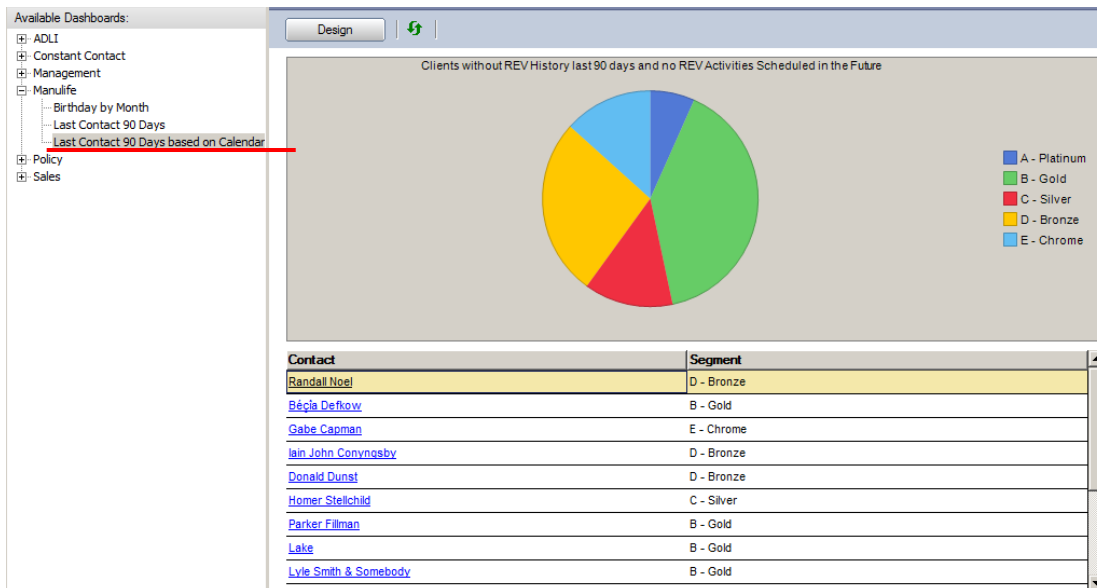
How to: Use Dashboards (To Schedule Events)

Increasing the efficiency of every-day processes by using CRM is one of our clients' top priorities. The use of dashboards for scheduling events (and many other things) is one of the most impressive ways that GoldMine can improve your efficiency. By booking calls, sending emails, etc. with dashboards, you can schedule calls for an entire group of contacts, with just a few clicks. In this edition of *TechTips* we will show you how to schedule calls based on dashboards. Keep in mind that SICON has the ability to customize and design these dashboards for your specific needs.

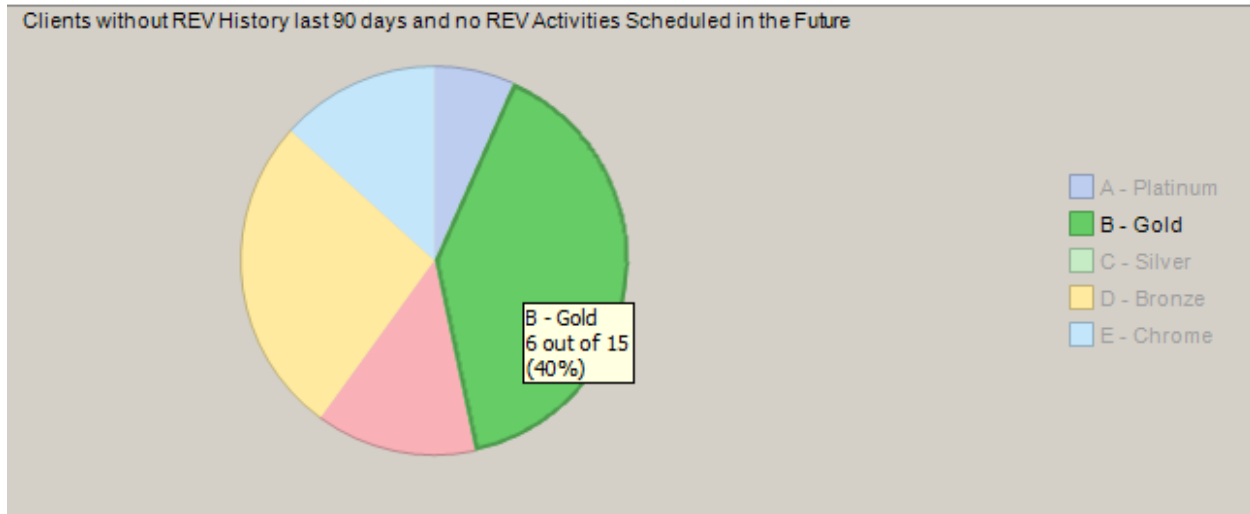
Step 1: From the left hand navigation menu select dashboards, if you don't see it, click the double arrow facing right and select dashboard from the menu



Step 2: Select the dashboard you would like to activate. In this case we are using our dashboard for clients who have not had a review in the last 90 days and do not have one scheduled in the future, by client segment



Step 3: Select the segment of the dashboard you would like to activate; these can be displayed in various graphs and reports. In this case we have selected our clients in the Gold segment, without a recent review in their history record, and none scheduled



Step 4: From the list of contacts, right click anywhere in the contact list, select **Activate Contact List** this will bring you to the contact list in the contact view

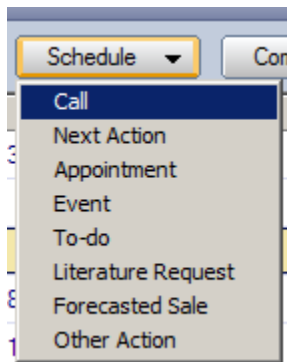
Contact	Segment
Béçia Defkow	B - Gold
Parker Fillman	B - Gold
Lake	
Lyle Smith & Somebody	
Charles Detail	
Jean Smith	

Step 4b: Select **Activate Contact List** this will bring you to the contact list in the contact view

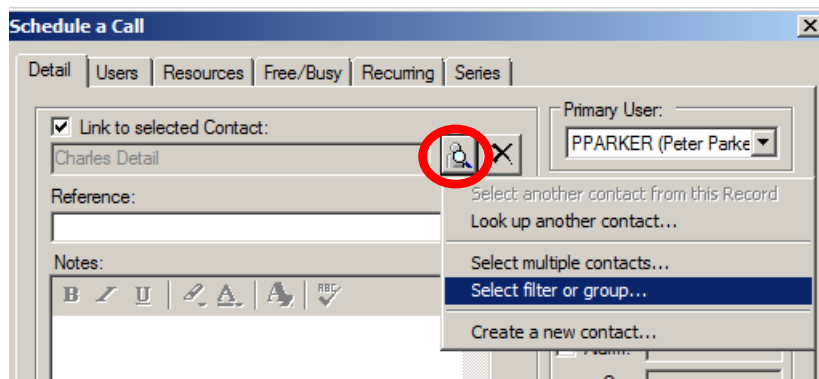
Company	Contact	Phone 1
Cadten Engineering Ltd.	Béçia Defkow	(708)555-3311
	Charles Detail	
	Jean Smith	
ComplyTec	Lake	(201)555-8000
ABC Pensions	Lyle Smith & Somebody	(514)555-1234
Blue Pelican Consulting	Parker Fillman	(214)555-5432

Step 5: Select **Schedule -> Call**

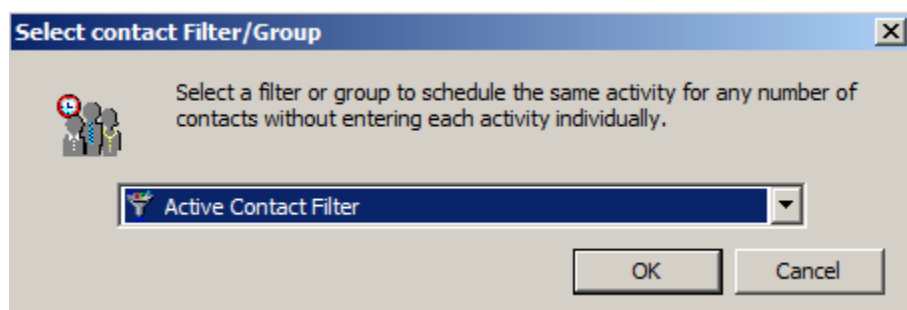
Note: (you can perform various functions at this step, such as adding all the contacts to a group, or scheduling various events)



Step 6: Beside the contact, select the magnifying glass, click **Select Filter or Group**



Step 7: From the dropdown, select **Active Contact Filter** (this should automatically be selected), click OK



Step 8a: From the *Schedule A Call menu*, Type in the reference of the call (this is what is displayed in the calendar), also assign a duration, link to a project, or anything else relevant to this group of calls.

Schedule a Call

Detail | Users | Resources | Free/Busy | Recurring | Series

Link to selected Contact:
Lake

Reference:
Review Call

Notes:
B U A ABC

Options
Activity: Call Code: Color: Blue

Opportunity / Project:
American Bank: 2 Analysts New

Or Case:
(none) New

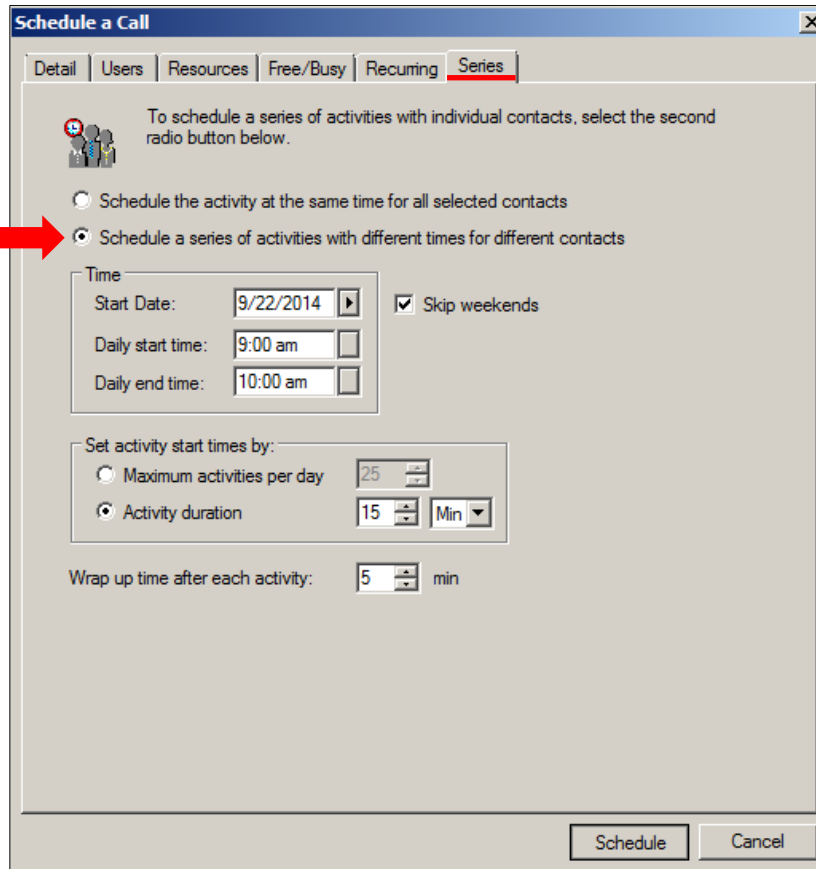
Primary User:
PPARKER (Peter Parke)

Time
Date: 9/8/2014
Time: 9:00 am
Duration: 15 Min
 Alarm:
On:

Actions
 Notify via E-mail
 Auto-generate RSVP
 Mark as Private
 Send a request with the Call to:
Contact(s)

Schedule Cancel

Step 8b: Select the Series tab from the tabs across the top of the dialogue box. To schedule events in series, select the second radial button (you can also opt to schedule them all at the same time). Once this is complete, select the start date, start time, and end time. This is important because if you only want to make sales calls to this group for half an hour per day, it will only schedule as many calls as it can fit consecutively in the timeframe you designate, or you can designate a maximum amount of activities to schedule per time frame.



The screenshot shows the 'Schedule a Call' dialog box with the 'Series' tab selected. The dialog has tabs for 'Detail', 'Users', 'Resources', 'Free/Busy', 'Recurring', and 'Series'. The 'Series' tab is active, and a red arrow points to the second radio button option: 'Schedule a series of activities with different times for different contacts'. Below this, the 'Time' section includes a 'Start Date' field set to '9/22/2014', a 'Skip weekends' checkbox which is checked, and 'Daily start time' and 'Daily end time' fields set to '9:00 am' and '10:00 am' respectively. The 'Set activity start times by:' section has two options: 'Maximum activities per day' (set to 25) and 'Activity duration' (set to 15 minutes), with the latter selected. At the bottom, the 'Wrap up time after each activity:' is set to 5 minutes. 'Schedule' and 'Cancel' buttons are at the bottom right.

Step 8c: Select your wrap up time; this will leave you a chosen amount of times between calls, allowing you to perform the wrap up tasks associated with the call

