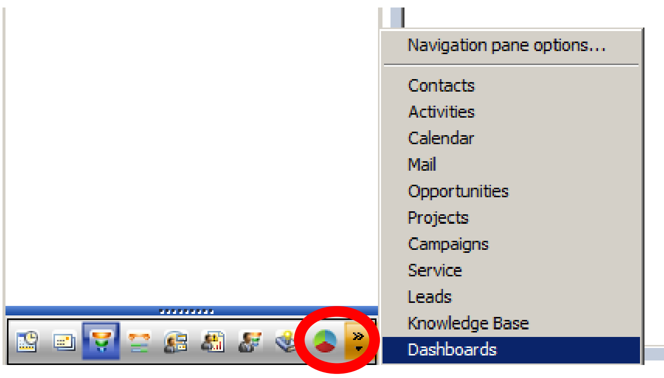
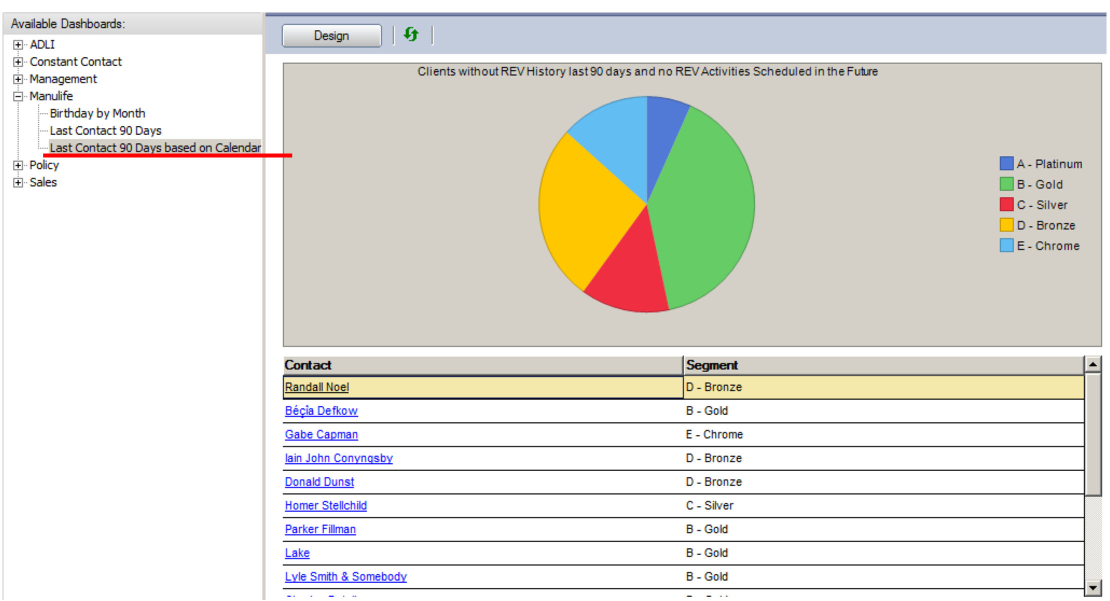
How to: Use Dashboards (To Schedule Events)

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.

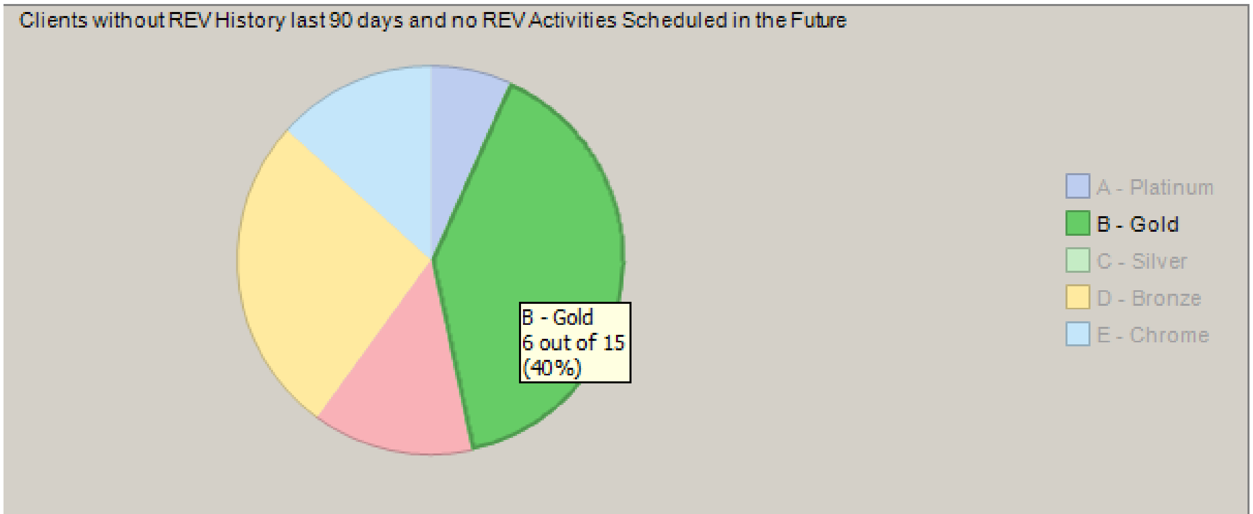
Step 1: From the left hand navigation menu select dashboards, if you don't see it, click the double arrow facing right and select dashboard from the menu



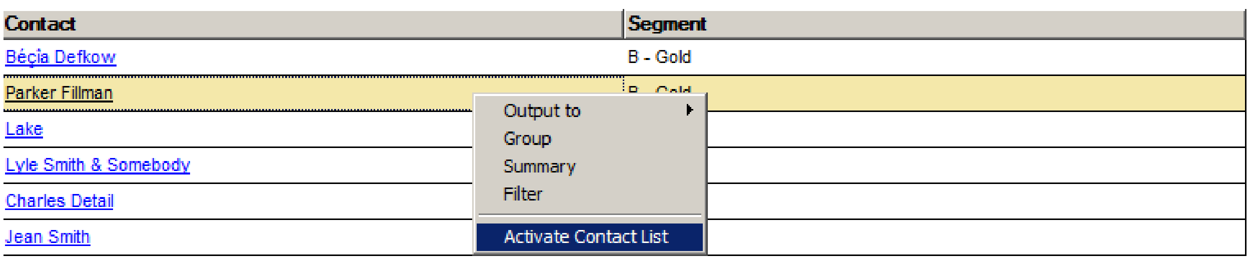
Step 2: Select the dashboard you would like to activate. In this case we are using our dashboard for clients who have not had a review in the last 90 days and do not have one scheduled in the future, by client segment



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



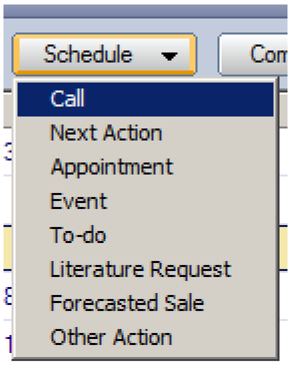
Step 4: From the list of contacts, right click anywhere in the contact list, select ***Activate Contact List*** this will bring you to the contact list in the contact view



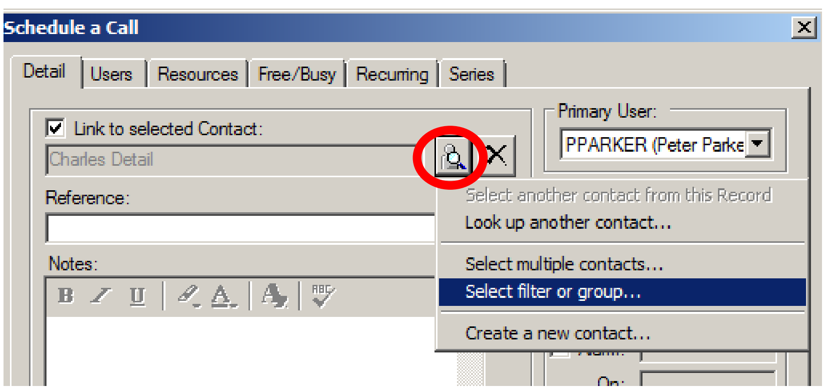
Step 4b: Select ***Activate Contact List*** this will bring you to the contact list in the contact view

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

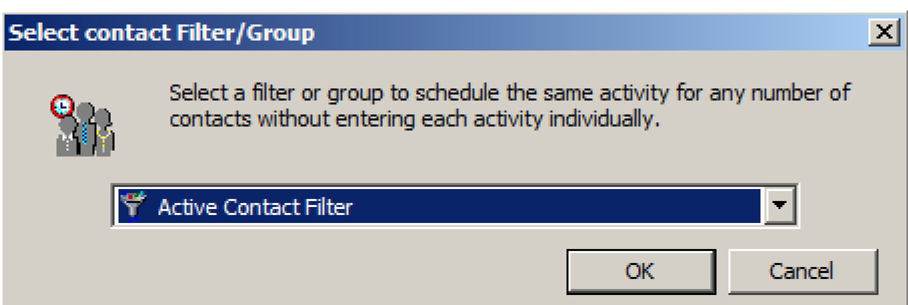
Note: (you can perform various functions at this step, such as adding all the contacts to a group, or scheduling various events)



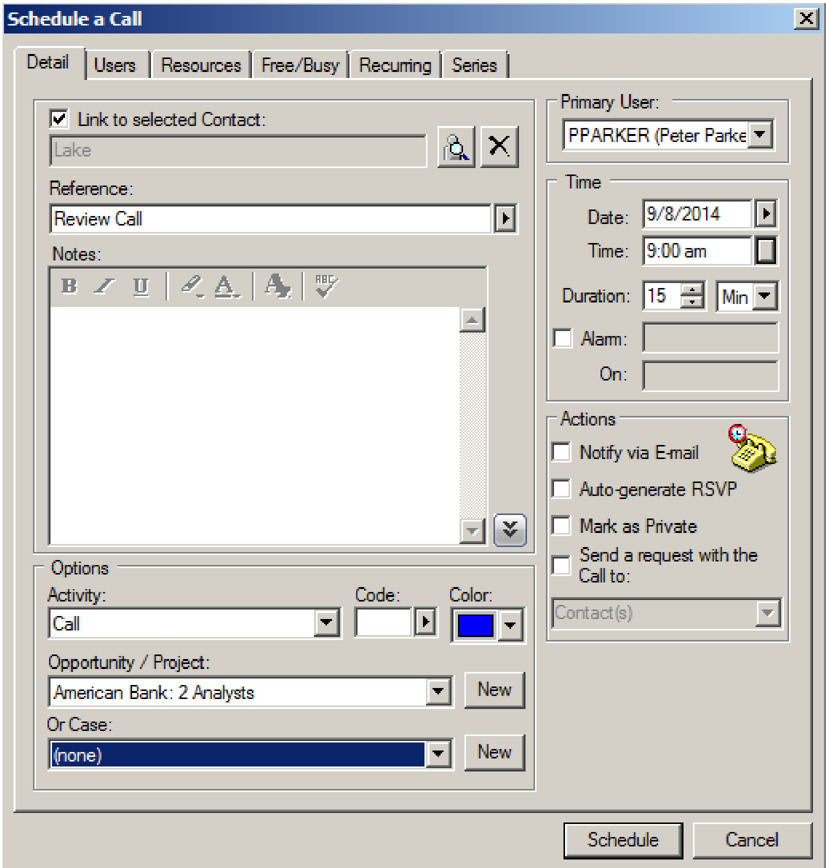
Step 6: Beside the contact, select the magnifying glass, click ***Select Filter or Group***



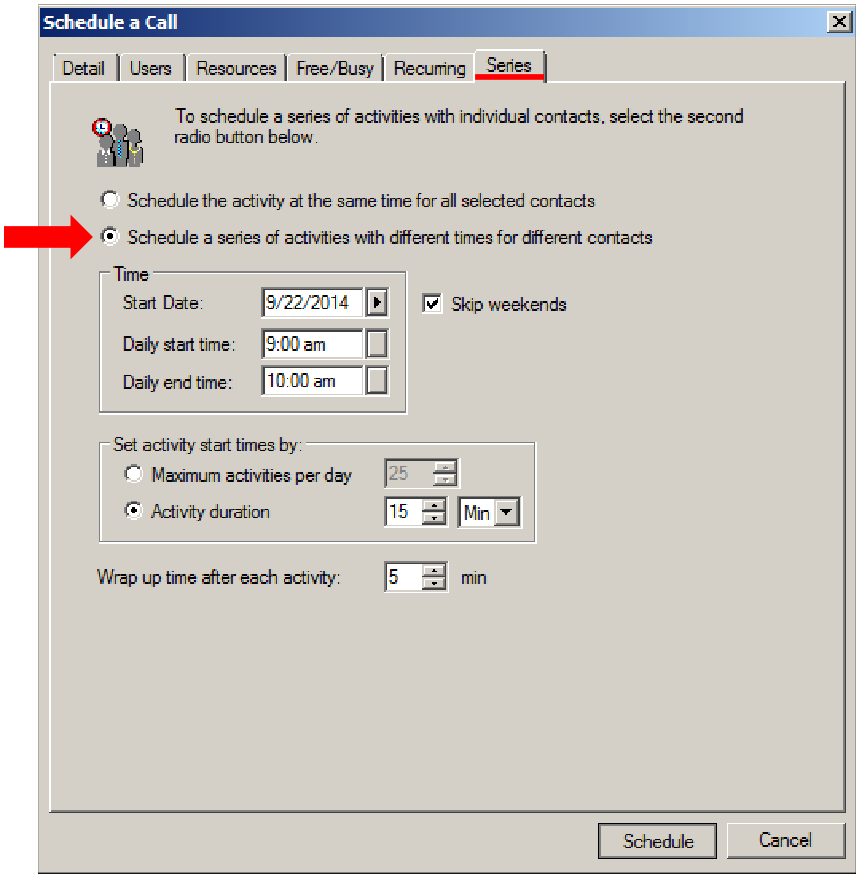
Step 7: From the dropdown, select ***Active Contact Filter*** (this should automatically be selected), click OK



<u>Step 8a:</u> 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.



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.



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

<u>Step 9:</u> Open your calendar; here you will see that it has only scheduled calls in the timeframe you requested. Also notice that because you only scheduled 1 hour to perform these calls with 5 minute wrap-up time, it only scheduled 3 calls per day during the 1 hour timeframe