

Contact Management- Who's Next?

JOBZ! makes it easy to know who you should contact next, when you should contact them, and why. All with a glance at your HOME screen dashboard:

JOBS
ADDRESS MEMOS
YOU HELP

Go To
= 1 / 18 8 & 1/2 x 11 - Alcatraz Asphalt Ale =
Organize
New
Find...
<< < > >>

Modified Today

Wednesday, July 27, 2016 Eric Clapton

8 & 1/2 x 11 - Alcatraz Asphalt Ale	Working
8 & 1/2 X 11 - Honey Blonde	Working
Carpe Data - Pliny the Elder	In Estimating
8 & 1/2 x 11 - WF India Pale Ale	In Estimating
A4 Graphics - Mazatlan by Sea	Working
A4 Graphics - Sugar Baby	Pending
Clan Tech, Inc - I Threw it All Away	Pending

In Estimating

8 & 1/2 x 11 - WF India Pale Ale	Tue 7/26/16
Carpe Data - Pliny the Elder	Wed 7/27/16

Pending

	Invoice	
8 & 1/2 x 11 - Just Like A Woman		9/2/16
8 & 1/2 x 11 - One More Cup Of Coffee	75%	9/2/16
A4 Graphics - Sugar Baby		9/2/16
A4 Graphics - WF Job Pr1mary Store Banner	100%	9/2/16
Clan Tech, Inc - I Threw it All Away		9/2/16

Working

	Ship
8 & 1/2 X 11 - Honey Blonde	7/30/16
A4 Graphics - Mazatlan by Sea	8/1/16
8 & 1/2 x 11 - Alcatraz Asphalt Ale	8/7/16

Contacts - To Do

	Next	Contacts	To Do
Kent Hoyt - Manticore	7/25/16	Follow up	re: Test Campaign
Ben Gone - Revenant	7/26/16	Get meeting	re: Annual Report
Justin Thyme - Synthesystems	7/27/16	Follow up	re: Cartons
Ben There - The Block	7/27/16	Email	Jersey
Chip Offah - The Block	7/27/16	Plant Tour?	Die cutting and folder-gluer
Bjorn Toulouse - CF Eye	8/13/16	Follow up	Banking
Bud Light - Evolo	8/14/16	Follow up	re: Cartons
Paige Downe - Claymore Information	8/16/16	Follow up	New features
Hugh Saturation - File Edit	8/24/16	Follow up	Banking

↑
Who

↑
When

↑
Why

The dates are color-coded

Contacts - To Do	Next	Contacts	To Do
Kent Hoyt - Manticore	7/25/16	Follow up	re: Test Campaign
Ben Gone - Revenant	7/26/16	Get meeting	re: Annual Report
Justin Thyme - Synthesystems	7/27/16	Follow up	re: Cartons
Ben There - The Block	7/27/16	Email	Jersey
Chip Offah - The Block	7/27/16	Plant Tour?	Die cutting and folder-gluer
Bjorn Toulouse - CF Eye	8/13/16	Follow up	Banking
Bud Light - Evolo	8/14/16	Follow up	re: Cartons
Paige Downe - Claymore Information	8/16/16	Follow up	New features
Hugh Saturation - File Edit	8/24/16	Follow up	Banking

Red dates are in the Past
Blue means Today
Black dates are in the Future

Click on one to view it in detail in ADDRESS

Results of last contact →

Plan for next contact →

History of all contacts you have made →

Number of contacts made ←

How long ago last contact was made ←

The screenshot shows a contact detail view for 'Kent Hoyt - Manticore'. At the top, there are tabs for 'Contacts', 'Segments', 'Regional', 'Company', 'Links', and 'Codes'. The main content area is titled 'Today Wednesday Jul 27, 2016' and shows '16 Contacts'. Below this, the 'Last Contact' section displays 'Wed 7/20/16 11:50 AM 7 Days Ago'. The 'What' field contains 'Spoke' and the 'Comment' field contains 'Encouraging'. There are 'Clear X' and 'Find X' buttons. The 'Next Contact' section shows a date of 'Mon 7/25/16' and a 'What' field of 'Follow up'. The 'Why' field contains 're: Test Campaign'. At the bottom, there are tabs for 'Contact History', 'Delegated To Do', and 'Ownership'. The 'Contact History' tab is active, showing a list of contact events with dates, times, and descriptions.

Click the Today button to record a contact made today

Or click into the Last Contact Date field and select a date from the calendar

Click into the What field and select a type of contact, or enter whatever you like

Click into the Comment field and enter a comment, or click the drop-down arrow and select one

The screenshot shows a contact management interface with several tabs: 'Contacts', 'Segments', 'Regional', 'Company', 'Links', and 'Codes'. The 'Today' button is highlighted, indicating the current date is Wednesday, July 27, 2016, with 16 contacts. The 'Last Contact' section shows a contact made on Wednesday, 7/20/16 at 11:50 AM, 7 days ago. The 'What' field is set to 'Spoke' and the 'Comment' field contains 'Encouraging'. The 'Next Contact' section shows a date of Monday, 7/25/16, with a 'What' field set to 'Follow up' and a 'Why' field set to 're: Test Campaign'. A 'Contact History' section at the bottom lists several past contacts with their dates, times, and comments.

The first screenshot shows the 'What' dropdown menu with options: 'Spoke', 'Saw', 'Good Conversation', 'Met', 'Got Email', 'Sent Email', 'Exchanged Email', and 'Left Voice Mail'. The second screenshot shows the 'Comment' dropdown menu with options: 'Encouraging', 'Discouraging', 'Will call me back', and 'Please call me back'. The third screenshot shows the 'Next Contact' dropdown menu with options: 'Checking in', 'Encouraging', 'Discouraging', 'Will call me back', and 'Please call me back'.

As you exit the Comment field, the Contact History will be recorded

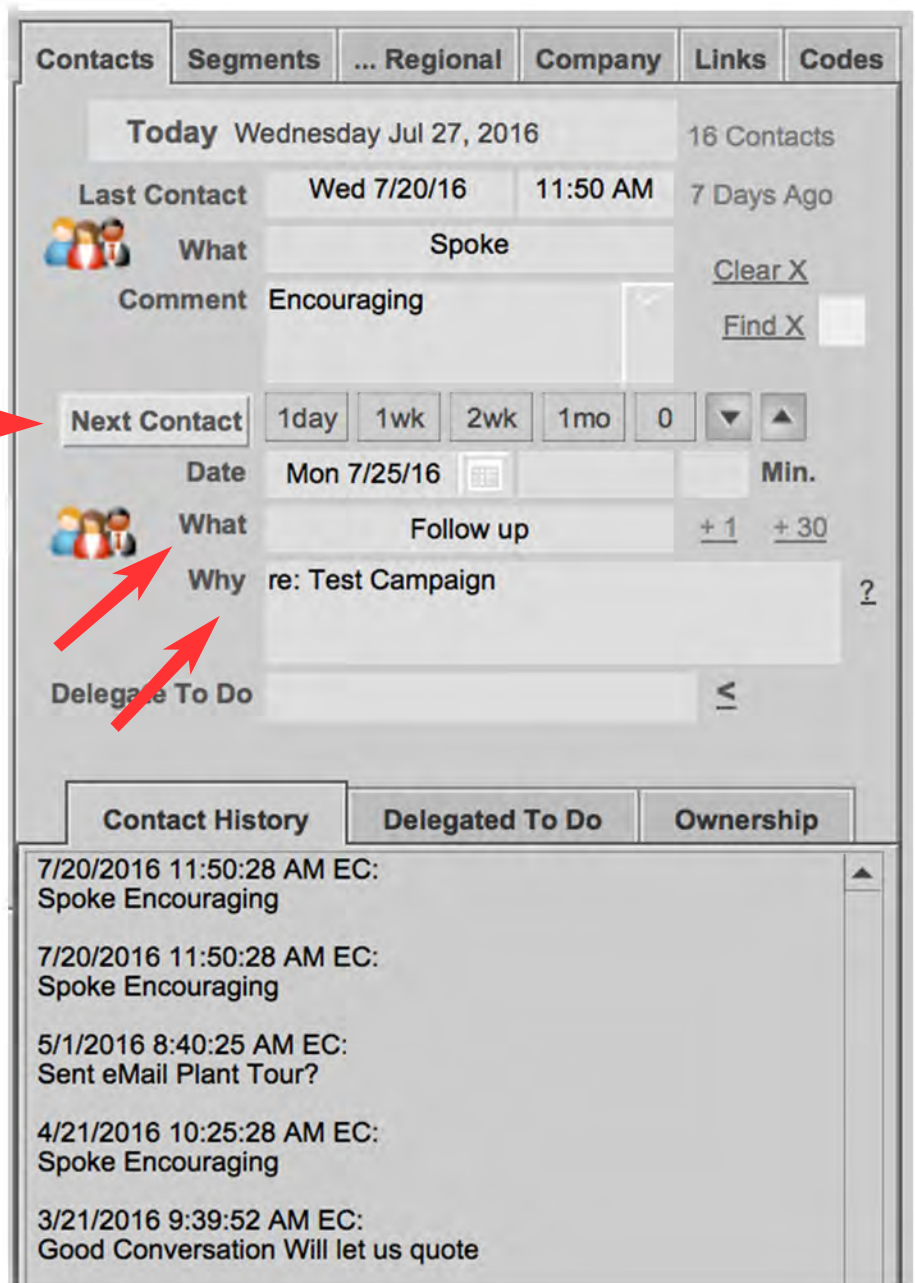
Plan the Next Contact

Click the Next Contact button and select a date from the calendar, or click any of the other buttons to automatically enter a Next Contact Date a day, a week, 2 weeks or month in the future

“0” will clear any future contact contact date if you want to give up

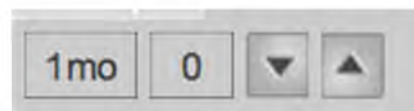
Then enter a What and Why

Clicking the Group icon will apply the activity to all the people in the Found Set!



The screenshot shows a CRM interface with tabs for 'Contacts', 'Segments', 'Regional', 'Company', 'Links', and 'Codes'. The main view displays contact activity for 'Today Wednesday Jul 27, 2016' with 16 contacts. The 'Last Contact' section shows a contact on 'Wed 7/20/16' at '11:50 AM' (7 Days Ago) with the activity 'Spoke' and comment 'Encouraging'. Below this, the 'Next Contact' section allows selecting a date from a calendar or using preset intervals: '1day', '1wk', '2wk', '1mo', and '0'. The 'What' field is set to 'Follow up' and the 'Why' field is 're: Test Campaign'. A 'Group' icon (three people) is visible next to the 'Next Contact' section. At the bottom, a 'Contact History' list shows previous activities: '7/20/2016 11:50:28 AM EC: Spoke Encouraging', '7/20/2016 11:50:28 AM EC: Spoke Encouraging', '5/1/2016 8:40:25 AM EC: Sent eMail Plant Tour?', '4/21/2016 10:25:28 AM EC: Spoke Encouraging', and '3/21/2016 9:39:52 AM EC: Good Conversation Will let us quote'. A 'Delegated To Do' section is also visible.

Clicking the little arrow buttons will move the activity from Next to Last or vice-versa



This contact tracking will appear in summary form on the HOME screen, as well as on the ADDRESS Menu

To be contacted tab

Contacted	To Contact	To Do	Someday	Delegated To Do	Done
Name	Company		Next Contact		
Kent Hoyt	Manticore		7/25/16	Follow up	re: Test Campaign
Ben Gone	Revenant		7/26/16	Get meeting	re: Annual Report
Justin Thyme	Synthesystems		7/27/16	Follow up	re: Cartons
Ben There	The Block Design Group		7/27/16	Email	Jersey
Chip Offah	The Block Design Group		7/27/16	Plant Tour?	Die cutting and folder-gluer
Bjorn Toulouse	CF Eye Care		8/13/16	Follow up	Banking
Bud Light	Evolvo		8/14/16	Follow up	re: Cartons
Paige Downe	Claymore Information Systems		8/16/16	Follow up	New features
Hugh Saturation	File Edit View, Inc.		8/24/16	Follow up	Banking
Marilyn Sparring	24 Seven Trade Printers		9/14/16 12:00 AM	Follow Up Memo	Myrtle Beach Blues PO #: 10212-1
Ben Dunne	A4 Graphics		9/17/16	Check in	Such and so

Recently contacted tab

Contacted	To Contact	To Do	Someday	Delegated To Do	Done
Name	Company		Last Contact		
Kent Hoyt	Manticore		7/20/16	Spoke	Encouraging
Ben Gone	Revenant		7/16/16	Good Conversation	Encouraging
Billy Rubin	Eight, Inc		7/12/16	Created Memo	Found Set Memo
Justin Thyme	Synthesystems		7/10/16	Met	Encouraging
Ben There	The Block Design Group		7/9/16	Reassigned	From: Eric Clapton
Bjorn Toulouse	CF Eye Care		7/6/16	Sent Email	Bubble Bash
Bud Light	Evolvo		7/5/16	Good Conversation	
Paige Downe	Claymore Information Systems		7/3/16	Mailing	New Equipment Brochure

The Organize pull-down also offers several ways of viewing and reporting your contact activity

Thanks for using JOBZ! and Good Selling!

