

MANAGING TO DO LIST

1. Your To Do's panel displays Activities assigned to you that are due now, or that are overdue.

The screenshot shows the ONCONTACT Daily Planner dashboard. At the top, there are four summary cards: 'My Past Due Activities' (10), 'Open Activities' (12), 'My Activities Completed Today' (19), and 'My Contacts' (32). Below these is a 'Today's Schedule' section with a list of appointments. On the right side, a 'To Do's' panel is highlighted with a red border. It contains a list of tasks with details such as date, time, and assignee.

To Do's
March 13, 2017 8:35am Follow up with Jill Thomas, Jill Assigned to Administrator
March 9, 2017 8:19am Thomas, Jill Assigned to Administrator
March 3, 2017 11:00am Send Quotation Gates, Andrea Assigned to Administrator
March 3, 2017 8:30am Appointment Albrinck, Josephine - Woodridge Architects Assigned to Administrator
March 3, 2017 6:30am Product Demonstration Charles, John - Henderson Enterprises Assigned to Administrator
March 3, 2017 5:00am Conference Call Barkley, Ivan - ABC Company Assigned to Administrator

2. Open an Activity when it is time to complete it.

This screenshot is similar to the first one, but the 'To Do's' panel is expanded to show the details of the selected activity: 'March 13, 2017 8:35am Follow up with Jill'. The details include the assignee (Thomas, Jill), the start and end times, and sections for Participants, Attachments, and Notes.

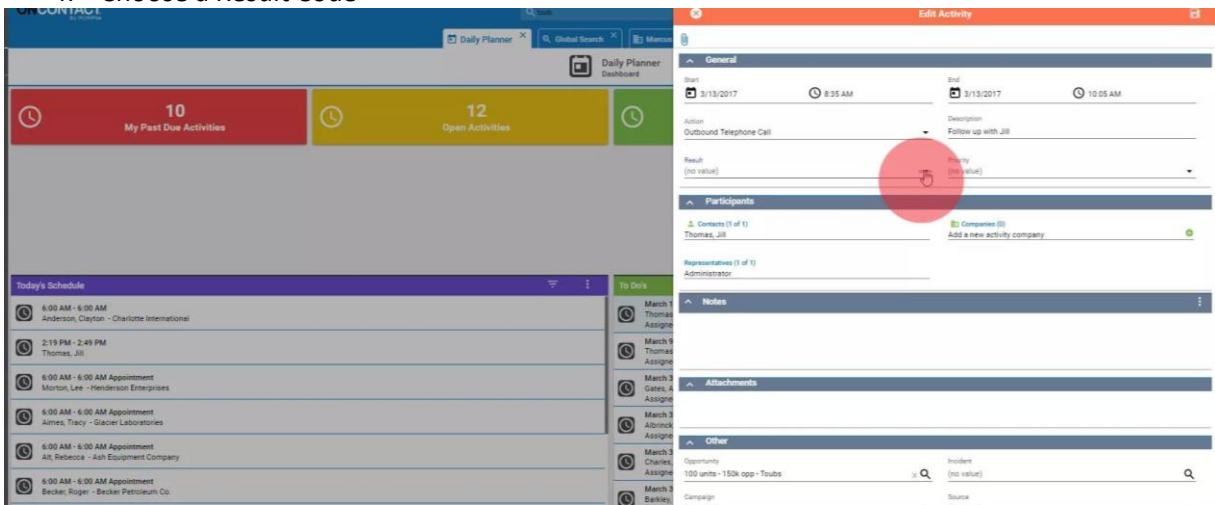
Follow up with Jill
Result (no value)
Start March 13, 2017 8:35am
End March 13, 2017 10:05am
Participants 2 Contacts (1 of 1) Thomas, Jill Representatives (1 of 1) Administrator
Companies (0) Add a new activity company
Attachments
Notes
Other Opportunity 1300 units - 150k opp - Touba Incident (no value)
Campaign Source
Program Date (no value) Program Inbound (no value)
Events (0) (no value)
Created By Administrator

3. Click to Edit

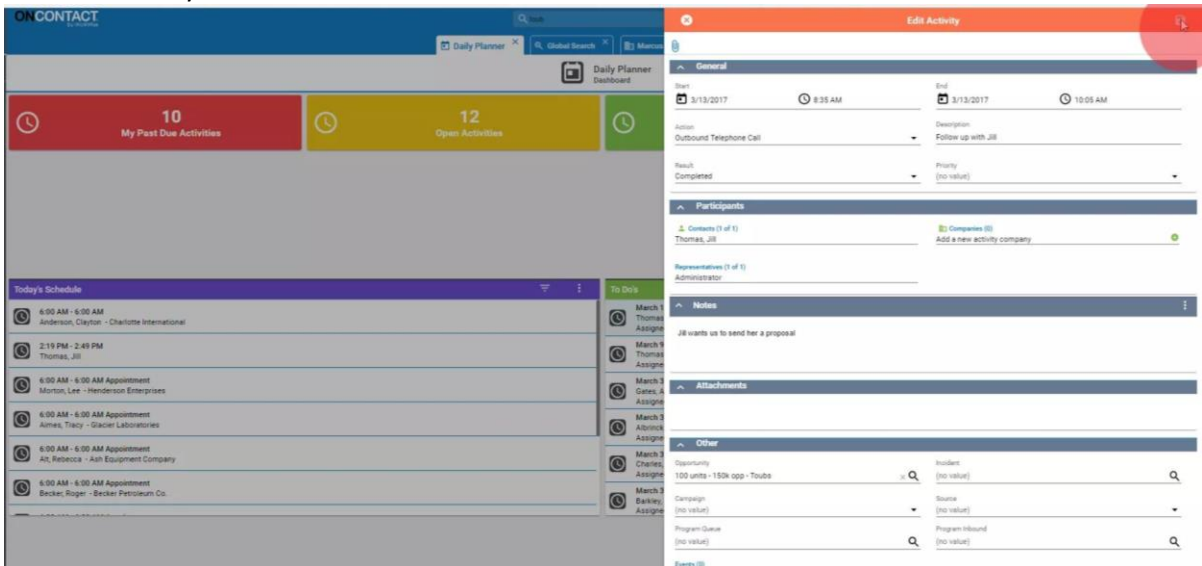
This screenshot shows the 'Edit' view of the activity 'Follow up with Jill'. A red circle highlights the 'Edit' button in the top right corner of the activity card. The rest of the activity details are visible, including participants, companies, and other metadata.

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4. Choose a Result Code



5. Add any Notes or other information. Click to Save.



6. That Activity is removed from the To Do list.

