



## Knowledge Base Article

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**Article ID:** 4202  
**Subject:** How to Setup the Outbound Call Plan  
**Last Modified:** August 25, 2008

**Applies to:** Pro Gold i2 3.0

**Issue:** Pro Gold i2 has the ability to monitor contact/prospect calls through the Outbound Call Plan and the Tickler. When Outbound Calls are placed to a contact/prospect, the “Next C.” field updates with the date that the next call should be placed to the contact/prospect. The Call Purpose settings help to operate the Tickler function by establishing the Next C. (Call) Date.

**Resolution:** Setup the **Outbound Call Plan**:

- In the **Setup Tab**, select “**Change Company Info**”.
- Select the “**Lists 1**” button.
- The options for the **Outbound Call plan** are located in the “**Call Purpose**” area.
  - There are 4 options already setup by default.
    - 15 Minute: Immediate Follow-up Call
    - 48 Hour: 2 Day Follow-up Call
    - 1 Month: 30 Day Follow-up Call
    - 3 Month: 90 Day Follow-up Call
  - When one of these options is selected for an outbound call in “**Contact Manager Professional (Work with Prospects)**”, the “**Next C.**” date is updated. When the Next C. date arrives, the contact will appear in the Tickler as a reminder for a follow-up call.
- The options can be changed by making changes to either the name of the “**Purpose Text**” or the “**Days**” field.
- New options can be added by using the blank line at the bottom of the list to enter a new item.
- The checkbox next to each item shows which options will be available for use. Un-checking the box will remove the item from selection in the “**Contact Manager Professional (Work with Prospects)**” area.
- Click “**Done**” to return to the menu.

**References:** Below is a link you can use to access Enhancement HelpNet Center resources, which includes the Knowledge Base Article (KBA) Library, Pro Gold i2 Documentation, and Training Webcasts:

<http://secured.progoldi2.com/webcast.aspx>

- The Enhancement HelpNet links are located on the right side of the web page.

**Related articles:** N/A

**Keywords:** Contact, Prospect, Lead, Outbound Call Plan Setup, Next Calls, Tickler, 4202

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