Knowledge Base Article

Article ID:	**4203**
Subject:	**How to use the Prospect Tickler**
Last Modified:	**September 5, 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 Outbound Call Plan settings help to operate the Tickler function by establishing the Next C. (Call) Date. Once the "Next C." date arrives, the contact/prospect appears in the Tickler for a follow up call.

Resolution: Use the Tickler:

- The "**Call Purpose**" options that help run the Tickler are setup in the Setup tab. For more information on setting up those options, refer to Knowledge Base Article 4202.
- In the **Prospects Tab**, select "**Work with Prospects**".
- Select the "**Tickler**" button to show what prospects need follow-up action.
- Double-click on a prospect name to select that prospect and bring up their contact record.
- In the "**Call History**" section of the screen, click on the "**New Call**" button.
    - Note: Make this entry after contact is made with the prospect to record the call.
- Select "**Outbound Call**" as the "**Call Type**".
- The "**Purpose**" field will automatically populate with the next outbound event.
- The current date and time will automatically populate the correct fields.
    - Note: Manual changes can be made to the "Date" and "Time" fields, if needed.
- Check the "**Completed**" checkbox to signify if the call was completed. Pro Gold i2 will then update the "Last Call" and "Next Call" fields to reflect the changes. The prospect will reappear in the Tickler when the time comes for the next outbound call. If not completed (No answer to call, etc…), leave completed box empty and the prospect cycles to the bottom of the tickler to await another call attempt. A call attempt must be completed for the prospect to cycle to the next Outbound Call event.
- Select another prospect from the Tickler or 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: Outbound Calls, Tickler, Call History, Completed, Contact, Prospect, Follow up, 4203