Quick Start Guide: Completing assigned Tasks in Customer View

Spark

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Introduction

Customer View enables your organisation to create Tasks (activities to do), and assign these Tasks to a user or user group along with a deadline date. Delegating follow-up phone calls is one of the most common uses of Tasks in Customer View.

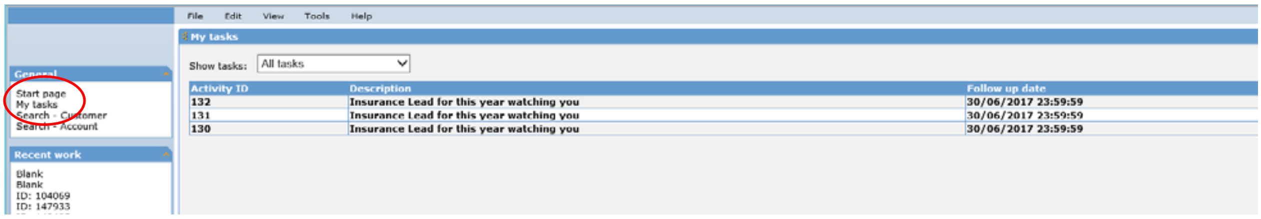
This guide details a simple 5-step process to completing a Task within Customer View. **The following assumptions have been made:**

1. A Dialogue for each trigger type has been created and scheduled where Tasks are automatically generated and assigned to a group (Branch).
2. Assigned Staff member (Marketing, Branch manager) has logged into Task Organiser and distributed Tasks to staff. Tasks can be moved to other users within Task Organiser.

This guide does not cover any After-Call work. If you get stuck or have any questions you can email Sarah at Spark – sjfowler@spark.com.au or register a request via the Spark Service Desk.

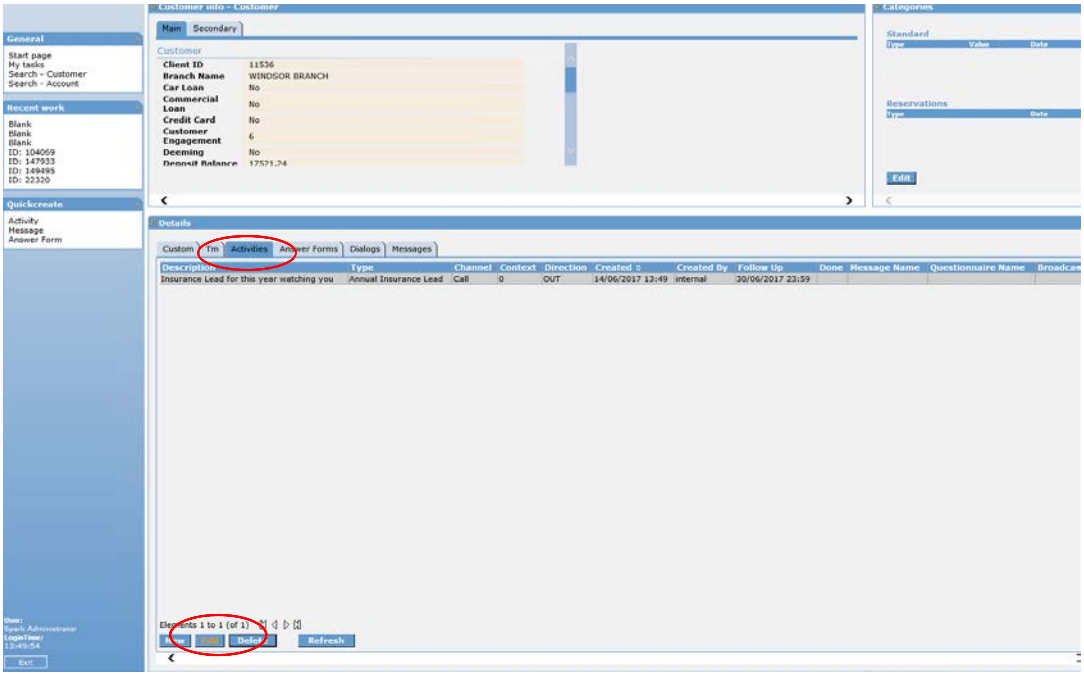
COMPLETE ASSIGNED TASK

1. Log into Customer View and select 'My Tasks'

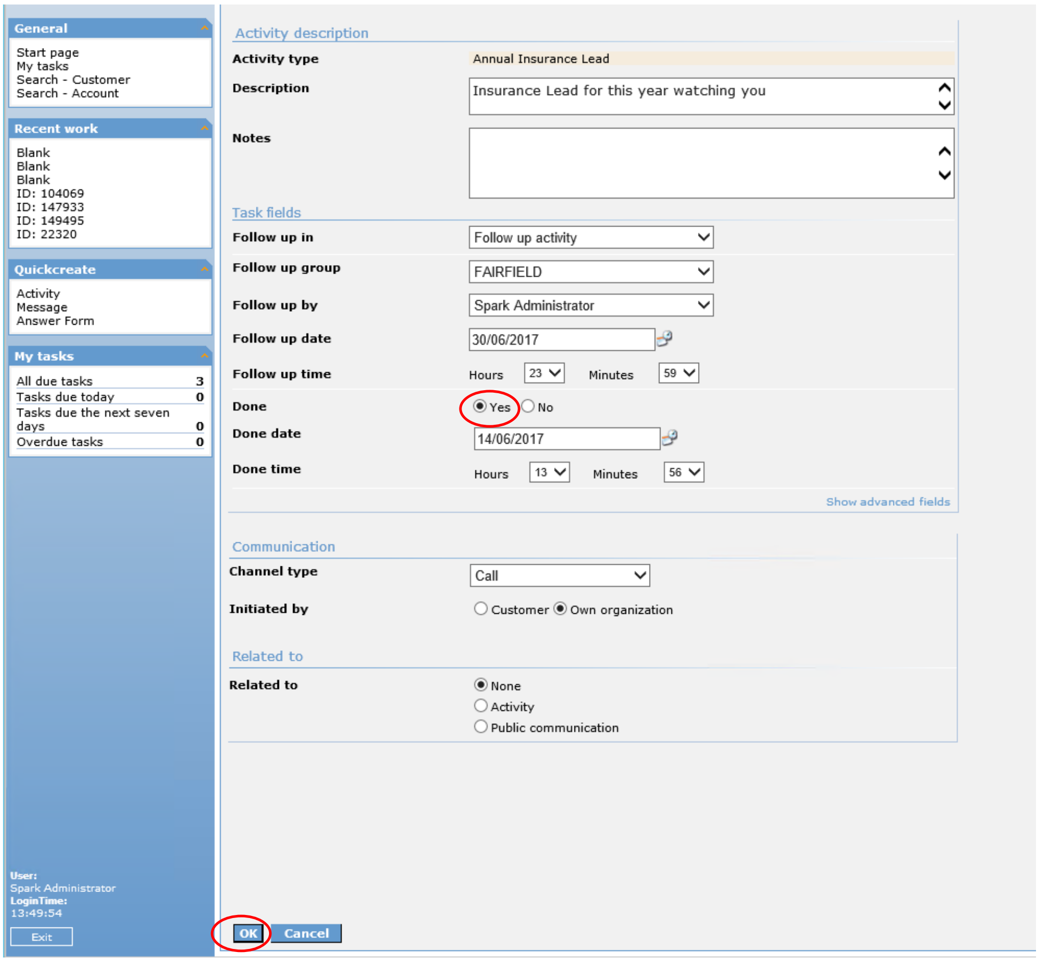


2. Select a task and open customer record.

3. Select the ‘Activity’ tab and edit the task



4. Complete the Task – e.g. Make the call to the Customer. Then, mark the Task as ‘Done’ and click ‘OK’.



CONGRATULATIONS! You’ve completed your first Task! To access the next record, simply click on ‘My Tasks’ (refer to step 1) in the General tab.