

## How To Submit Your CRM Follow Up From Outlook & Phone

**PLEASE NOTE:** You only need to make your **initial** CRM submission through TEAM KMH, this tutorial will walk you through how to make **ALL** follow ups from there on out right from your Outlook / Phone.

1. After submitting your initial entry through TEAM KMH Christina will then send out an Outlook Calendar invite to the Sales Rep(s) that have submitted an entry and or are related to the project.
  - a. This invite date & time will be based on the "Follow Up Activity" information that was filled out on TEAM KMH
  - b. This calendar invite will also include all the information that was submitted to team.kmhsystems.com

The screenshot shows the Microsoft Outlook 'Invited Event' window. The title bar reads 'Red Corporation Appointment - Invited Event'. The ribbon includes 'File', 'Invited Event', 'Insert', 'Format Text', 'Review', and 'Developer'. The 'Invited Event' ribbon has several groups: 'Actions' (Delete, Forward, OneNote), 'Show' (Appointment, Scheduling Assistant), 'Attendees' (Cancel Invitation), 'Options' (Free, Recurrence, Time Zones, 18 hours, Room Finder), 'Tags' (Categorize), and 'Zoom' (Zoom). A notification at the top left states 'Invitations have not been sent for this meeting.' The 'Send' button is visible. The 'To...' field lists 'Tim Neroni' and 'Tom Kempf'. The 'Subject' is 'Red Corporation Appointment' and the 'Location' is 'Red Corporation'. The 'Start time' is 'Thu 10/18/2012 12:00 AM' and the 'End time' is 'Thu 10/18/2012 12:00 AM'. The 'All day event' checkbox is checked. The main body of the invite contains the following text: 'From: Tim Neroni', 'Subject: CRM Sales Entry', 'Additional Sales Rep: Tom Kempf', 'Customer: Red Corporation', 'Contact Name: Tom Johnson', 'Contact Email: tjohnson@redcorp.com', 'Activity: Appointment', 'Activity Date: 10-11-2012', 'Details: Had an appointment with Tom regarding the need of an additional 30 ft. of accumulating conveyor in the northern warehouse. Need to quote and follow up.', 'Equipment & Service: All', 'Integrated Systems: Systems, Warehousing', 'Construction: Material Handling', 'Follow Up Activity: Appointment', 'Follow Up Activity Date: 10-18-2012'. The bottom left corner shows 'In Shared Folder: John Hill'. On the right side, there is a 'Room Finder' pane for 'October, 2012' with a calendar grid. The grid shows dates from 1 to 10. Below the grid are radio buttons for 'Good', 'Fair', and 'Poor' room quality. A 'Choose an available room:' section shows 'None'. A 'Suggested times:' section states 'Suggestions are not provided for all day meetings.'

- After accepting the invite you receive from your TEAM KMH entry, it will then appear as scheduled in your Outlook calendar. You can view all your scheduled appointments, calls, etc. in the "Calendar" section inside of Outlook or on your iPhone calendar.

Tom Kempf - Calendar - Microsoft Outlook

File Home Send / Receive Folder View Developer Add-Ins

New Appointment Meeting Items Today Next 7 Days Day Work Week Week Month Schedule View Open Calendar Manage Calendars Calendar Groups E-mail Calendar Share Calendar Publish Calendar Online Calendar Permissions Find a Contact Address Book Find

January 2013

Su	Mo	Tu	We	Th	Fr	Sa
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

My Calendars

- Calendar

Shared Calendars

- John Hill
- Christina Ciani
- Tom Kempf**
- Jeff Laumann
- Michael Smith
- Andrew Wilson

Mail

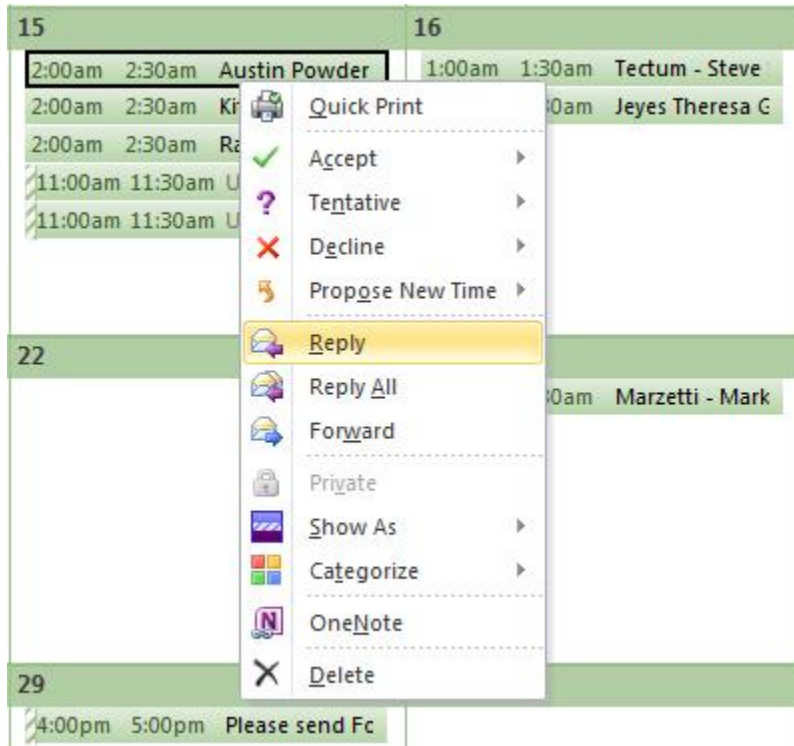
Calendar

Contacts

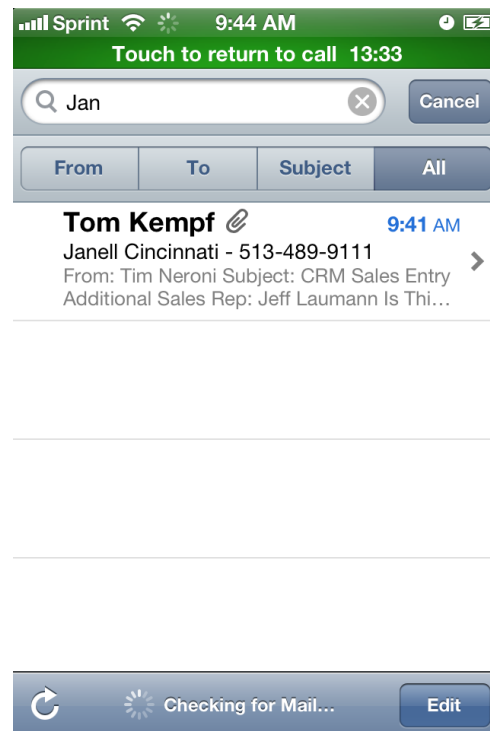
Tasks

Items: 92

3. After completing a scheduled appointment from your calendar for the day you'll want to “right-click” on that specific appointment and select “reply”.



- a. Replying from an iPhone requires you to navigate to your email inbox and searching for the company name by tapping on the “All” option. The most recent email invite will be at the top of the results. This is what you will “Reply” to. (see screenshots below)



4. Once you hit the reply button an email reply window will pop-up based on that appointment. As you will notice the email will be going "To" Christina. In the email body you will see the initial info submitted through TEAM KMH along with any other follow up history you may have submitted through Outlook.

- a. In this email is where you will input what you have just completed with the customer. **(this is the step that takes the place of resubmitting an entire entry through TEAM KMH)**
- b. You'll want to supply Christina in this email with:
  - i. The date
  - ii. Description of activity
  - iii. Type of follow
  - iv. Follow up date & time

**example**

5. After filling out your follow up information and sending it, Christina will receive the email, enter your info into Goldmine and also reschedule into your Outlook once again. This process will continue to repeat as you follow these steps, carrying a complete history log of customer along with it.

