



## Best Practice for Completing Call Plan Activity

1. Browse to the activity tab. Filter by “Open Planning” under “All Descriptions” click Run.

ACTIVITY

Filter Options →

Branch Zones All Users Department **Open Planning** Select Campaign Select Date Range... Account Name Customer PO All Accounts No Limit Order by DESC LOG ACTIVITY

RUN DOWNLOAD

Thursday, April 10th, 2025 - Friday, April 11th, 2025

BR	DEPT	ACCOUNT	MTD/PYTD+/-%	YTD/PYTD+/-%	SALES	INSIDE	BY	QUOTE#	DATE	TYPE	DESCRIPTION	AMOUNT	
1C M	MR	PONTOTOC COUNTY SCHOOL DISTRICT Comment: Kayla Bennett 354 CENTER RIDGE DRIVE, PONTOTOC, MS 38863 View   View Activity   Log Quote Activity	0.0%	0.0%		JKH	JP2	JMM	RFQID6334	04/11/2025	RFQ Closed	Maintenance Wants A Quote On A New Pump. And A Quote To Repair Assuming We Would Be Just At The Bid Threshold. Sent To Kayla At The Email Address Above.  RFQ N/A: Duplicate	0.00
2A L	MR	Reynolds Metals Company 1333 Highway 279, Mableton, AR 72104 View   View Activity   Log Quote Activity	-100.0%	-45.3%		TWP	DMZ	DRJ	103786	04/11/2025	Stage Update	Job Scheduled	0.00

2. With a recent update as of 4/11/2025 the complete plan link will now open a new tab.

YTD/PYTD+/-%	SALES	INSIDE	BY	QUOTE#	DATE	TYPE	DESCRIPTION	AMOUNT
0.0%	1000.0%	JKH	JP2	JKH	04/11/2025	Planning	<a href="#">Complete Plan</a>	0.00
0.0%	1000.0%	DTP	DMZ	DTP	04/11/2025	Planning	<a href="#">Complete Plan</a>	0.00
0.0%	-54.0%	TWP	DMZ	DTP	04/11/2025	Planning	<a href="#">Complete Plan</a>	0.00

3. You can enter your resulting plan activity and you will be sent back to the account detail page of the latest activity. Here you can close the tab. Or...If you have other open call plan activity to complete for this individual account you can scroll down to within the “Recent Activity” box. All open planning should be towards the top of the activity based on having

call plan date originally set to a future date.

BR	DEPT	ACCOUNT	MTD/PYMTD +/- %	YTD/PYTD +/- %	SALES	INSIDE	BY	QUOTE#	DATE	TYPE	DESCRIPTION	AMOUNT
1C M	HR	Carlisle SynTec Inc. Contact: Barry Arnett 1201 Scott Street, Senatobia, MS 38668 <a href="#">View</a>   <a href="#">View Activity</a>   <a href="#">Log Activity</a>	0.0%	-29.9%	WEV	SGB	WEV		04/18/2025	Planning	Meet With Barry To Discuss When They Want To Try To Install The Tie Off Points. Parts Should Be In Next Week.	0.00
1C M	HR	Carlisle SynTec Inc. Contact: Joe Smith 1201 Scott Street, Senatobia, MS 38668 <a href="#">View</a>   <a href="#">View Activity</a>   <a href="#">Log Activity</a>	0.0%	-29.9%	WEV	SGB	WEV		04/18/2025	Planning	Follow Up With Joe On Any Open Quotes We Currently Have For Them, Also Check To See If The New Sew Had The Same Issues As The One We Brought In The Shop.	0.00
1C M	HR	Carlisle SynTec Inc. 1201 Scott Street, Senatobia, MS 38668 <a href="#">View</a>   <a href="#">View Activity</a>   <a href="#">Log Activity</a>	1000.0%	-29.9%	WEV	SGB	JBA	026508 Job Quote	04/11/2025	ACS	Job Quote Created New Remotes	0.00

If you have any questions please contact either Rick or Mitch for more information.