**Touch Point Tasks** allows you to create a task under a specific customer and then assign that task to a member of your staff to communicate with that customer.

Follow these steps to create **Touch Point Tasks** under a **Customer** record.

- A Customer Search X Wilder Last Name: City: Member #: First Name: State: Membership ~ Phone: Zip: Exact Name Match Email: Customer #: Search For Business Records Per Page: 20 Show Disabled Customer -Search LastName First Name Customer # State Zip Parent Name Street 1 City 3060 Highw. \* Wilder Almonzo 94587 Mansfield MO 2 \* indicates customer has orders Previous Next View Add New OK Cancel
- 1. In **AMS**, search for a **Customer Record**.

Once you have selected the Customer, click on the Customer Number to open the record.



3. Click on the Touch Points tab

| AN   | I Add Customer     |               |          |          |             |              |                |                       | × |
|------|--------------------|---------------|----------|----------|-------------|--------------|----------------|-----------------------|---|
| Gene | al Question/Answer | Casafications | Contacts | Henbersh | es Web Loge | Touch Points | Sales Info Cur | stoner Benefits Notes |   |
| Suby | ed.                | Created By    | Austy    | ved To   | Description | Type         | Due Date       | Last Updated Complete |   |

4. Right click on the **Touch Points** field and select **Add**.



5. Enter the **Subject** of this task.

| A Cultome To    | such Paint                      |  |
|-----------------|---------------------------------|--|
| General Station | - law                           |  |
| Customer        | Altrange Village                |  |
| Date Added      | 05/17/2017 02:54 PM             |  |
| Last Updated    | 051730173258 PM                 |  |
| line:           | Hape Diller                     |  |
| CRM Erral       | 1 March 1997                    |  |
| Subject:        | Subscription Renewal Phone Call |  |
| Type            | Trut                            |  |
| Antiput To      | New York                        |  |

6. In the **Type** drop-down, select the type of communication that should be used to contact this customer (i.e **Email**, **Phone**, etc.).

| Cher (Bryand | 05-1120-1-02-06-PM                         |   |
|--------------|--------------------------------------------|---|
| User:        | Hige Siber                                 |   |
| CPH Errait   | 0450                                       |   |
| Subject      | Subscription Renewal Phane Call            |   |
| Гуре:        | Email                                      | ~ |
|              | BulkEmail<br>Email<br>External<br>InPerson |   |
|              | Phone<br>Postal Service                    |   |
|              | Text                                       |   |

7. In the **Assigned To** drop-down, select the staff member that this task will be assigned.

| Туре                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Prore                                                                                          | ~ |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|---|
| Assigned To:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Hope Biber                                                                                     | ~ |
| from the second                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Becky Roubos<br>Brian Shoemaker<br>Hope Biber                                                  |   |
| and the second sec | Herman Munster                                                                                 |   |
| Correspondence -                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | John Brooks<br>John Lemon<br>Julian McBride<br>Mary Jane Charriere<br>Nick Brown<br>Boher Cash |   |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Richard Steward<br>Demo Admin                                                                  |   |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Sandy Box<br>Hannah Steward                                                                    |   |

8. Check the **Due Date** box and select the **Date** that this task needs to be completed.

| Com.         | -            | pe cone                                                 |                           |                           |                                  |                            |                            |                            |          |
|--------------|--------------|---------------------------------------------------------|---------------------------|---------------------------|----------------------------------|----------------------------|----------------------------|----------------------------|----------|
| CRM Email    | 016          |                                                         |                           |                           |                                  |                            |                            |                            |          |
| Subject      | 54           | laciplic                                                | n Ren                     | end ?                     | hone (                           | al .                       |                            |                            |          |
| Турк         | 16           | Phone V                                                 |                           |                           |                                  |                            |                            |                            |          |
| Assigned To: | 14           | pe Bibe                                                 |                           |                           |                                  |                            |                            |                            | w        |
| Due Date:    | $\checkmark$ | 05/19                                                   | /2017                     | 11:59                     | а                                |                            |                            | [                          | •        |
| Complete:    |              | 4                                                       |                           | N                         | May 20                           | 17                         |                            | +                          |          |
| Comments:    |              | Sun<br>30<br>7<br>14<br>21                              | Mon<br>1<br>8<br>15<br>22 | Tue<br>2<br>9<br>16<br>23 | Wed<br>3<br>10<br>17<br>24<br>21 | Thu<br>4<br>11<br>18<br>25 | Fri<br>5<br>12<br>19<br>26 | Sat<br>6<br>13<br>20<br>27 | $\vdash$ |
|              |              | 28 29 30 31 1 2 3<br>4 5 6 7 8 9 10<br>Today: 5/17/2017 |                           |                           |                                  |                            |                            |                            |          |

9. Add any additional information about this task in the **Comments** area.

| Comments:                                                  |                                 |  |
|------------------------------------------------------------|---------------------------------|--|
| Please call Mr. Wilder as he does not have email. Speak lo | he is a little hard of hearing. |  |

10. Click **Apply** to save and **OK** to close the window.

11. When the staff member is logged into **AMS**, they will see the list of tasks at the bottom of the screen.

| Agile Demo Sandbox - Sales (DEMO) - P<br>File View Action Ticket Printer Sales                                         | Mode Support Functions Help                                                                                       | 2 20 100 1                                                  |             |                      |              |                       |                      | -        | a ×       |
|------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------|-------------|----------------------|--------------|-----------------------|----------------------|----------|-----------|
| Sales Maretenance Point Of Sale                                                                                        | Char Order Duernite Cultumer Member                                                                               | Remove Contact Remine Page                                  | eneret.     |                      |              |                       |                      |          | A Suffree |
| Agle At House Sandhox 🗸 🗸                                                                                              | Pore Eral [                                                                                                       | 20                                                          |             |                      |              |                       |                      |          |           |
| ANG - Box Ofice                                                                                                        | Regoral Bulletin Board                                                                                            |                                                             |             |                      |              |                       |                      |          |           |
| Nententie Package<br>Catalog Donation Event Silt Card<br>Agle Clarat 1 (AC1)<br>Agle Clarat 1 (AC1)<br>Agle Sheer (AD) |                                                                                                                   |                                                             |             |                      |              |                       |                      |          |           |
| Community Ballet Company (CBC)<br>Fundhalong Events (FE)<br>Movies (MV)                                                |                                                                                                                   |                                                             |             |                      |              |                       |                      |          |           |
| Special Events (SE)                                                                                                    | Corporate Bulletin Board<br>Agile Art House Sandhor<br>Timegrave GMT 4-00: Central Time<br>Phane 8 (615) 111-2222 | Address: 3810 Central Pike<br>Sie 301<br>HEPBRTAGE, TN 3707 | 5           |                      |              |                       |                      |          |           |
| Line MR.                                                                                                               |                                                                                                                   |                                                             |             |                      |              |                       |                      |          |           |
| Vena Al Venas V                                                                                                        |                                                                                                                   |                                                             |             |                      |              |                       |                      |          |           |
| Category Al Categories ~                                                                                               |                                                                                                                   |                                                             |             |                      |              |                       |                      |          |           |
| Reyword Av12/0012 Eller                                                                                                |                                                                                                                   |                                                             |             |                      |              |                       |                      |          |           |
| End Date 5/17/2019                                                                                                     |                                                                                                                   |                                                             |             |                      |              |                       |                      |          |           |
| Seath                                                                                                                  | Subject Customer                                                                                                  | Created By                                                  | Assigned To | Description          | Туре         | Due Date              | Last Updated         | Complete |           |
|                                                                                                                        | Renewal Notification Caroline Ing                                                                                 | alls Hope Biber                                             | Sandy Box   | Please call Ms. Inga | lls to Phone | May 31, 2017 11:59 Al | May 09, 2017 05:12 P | M False  |           |
| ten Court (Etenia)                                                                                                     | bint                                                                                                              |                                                             |             |                      |              |                       |                      |          |           |
| Substat \$5.00<br>Toket Free \$5.00                                                                                    | d u                                                                                                               |                                                             |             |                      |              |                       |                      |          |           |
| Service Feet: \$0.00                                                                                                   | ne                                                                                                                |                                                             |             |                      |              |                       |                      |          |           |
| Order Fees \$1.00<br>Delivery Fees \$2.00                                                                              | 1 <sup>4</sup>                                                                                                    |                                                             |             |                      |              |                       |                      |          |           |
| Donations 80.00                                                                                                        |                                                                                                                   |                                                             |             |                      |              |                       |                      |          |           |
| Tax 80.00<br>Onter Tutel 80.00                                                                                         |                                                                                                                   |                                                             |             |                      |              |                       |                      |          |           |
| Batance Due: 80.00                                                                                                     |                                                                                                                   |                                                             |             |                      |              |                       |                      |          |           |
| User sandybox Tempral ADMIN                                                                                            | TAFF Not Cashed In Training Mode                                                                                  |                                                             |             |                      |              |                       |                      |          |           |

12. To look at the details of a specific task that you were assigned, simply double-click on the task and the task window will open.

13. If there needs to be a follow up on any of the tasks, simply open the task, click on the **Follow Ups** tab and add or adjust the notes.

14. Once the task is completed, the staff member can check mark the box next to **Complete.** 

| Due Date:   | HS 05/31/2017 11:59 a                        |
|-------------|----------------------------------------------|
| Complete:   |                                              |
| Comments    |                                              |
| Pease cal H | a ingels to get her to renew her membership. |
|             |                                              |