

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.

1. In **AMS**, search for a **Customer Record**.

LastName	First Name	Customer #	Street 1	City	State	Zip	Parent Name
* Wilder	Almonzo	94587	3060 Highw...	Mansfield	MO	65704	

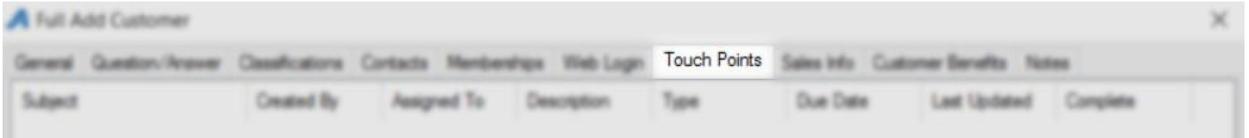
2. Once you have selected the **Customer**, click on the **Customer Number** to open the record.

Customer #: 94587

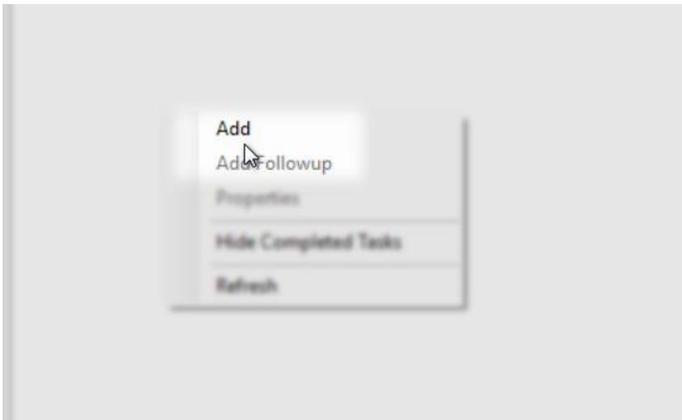
Billing Address
Almonzo Wilder
3060 Highway A
Mansfield, MO 65704

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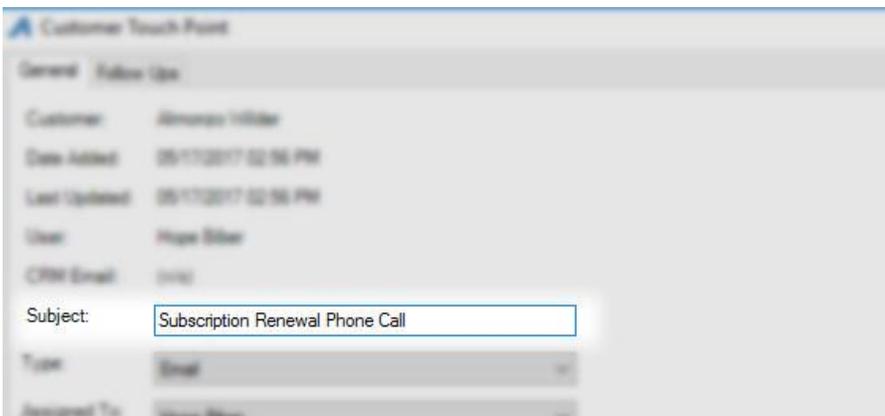
3. Click on the **Touch Points** tab



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

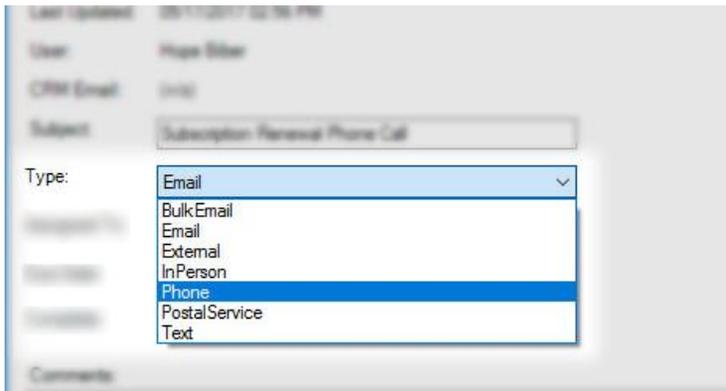


5. Enter the **Subject** of this task.



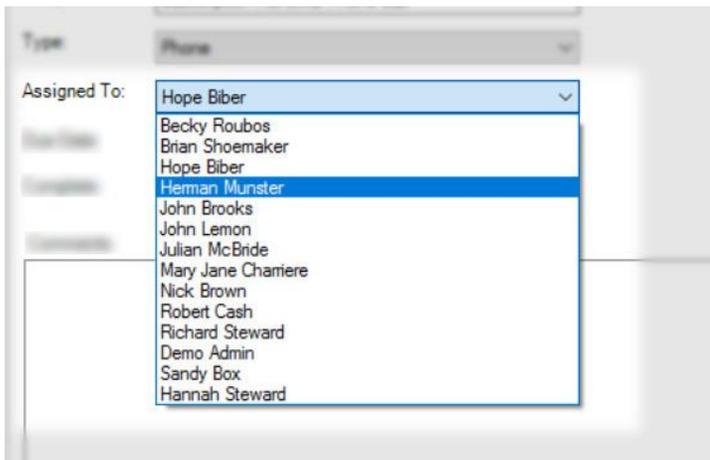
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- In the **Type** drop-down, select the type of communication that should be used to contact this customer (i.e **Email**, **Phone**, etc.).



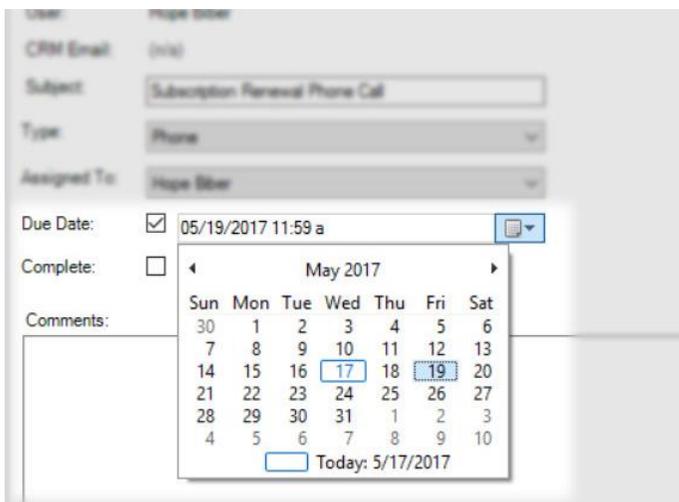
The screenshot shows a form with the following fields: User (Hope Biber), CRM Email (no), Subject (Subscription Renewal Phone Call), Type (Email), Assigned To (empty), Comments (empty), and a Comments text area. The 'Type' dropdown menu is open, showing the following options: Email, BulkEmail, Email, External, InPerson, Phone, PostalService, and Text. The 'Phone' option is highlighted.

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



The screenshot shows the 'Assigned To' dropdown menu open, displaying a list of staff members: Hope Biber, Becky Roubos, Brian Shoemaker, Hope Biber, Herman Munster, John Brooks, John Lemon, Julian McBride, Mary Jane Chariere, Nick Brown, Robert Cash, Richard Steward, Demo Admin, Sandy Box, and Hannah Steward. The 'Herman Munster' option is highlighted.

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



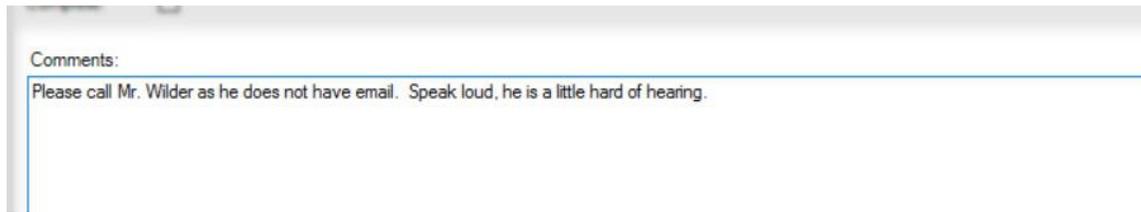
The screenshot shows the 'Due Date' field checked and set to 05/19/2017 11:59 a. The 'Complete' field is unchecked. A calendar widget is open, showing the month of May 2017. The date 19 is highlighted. The 'Today' is 5/17/2017.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	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	10

Today: 5/17/2017

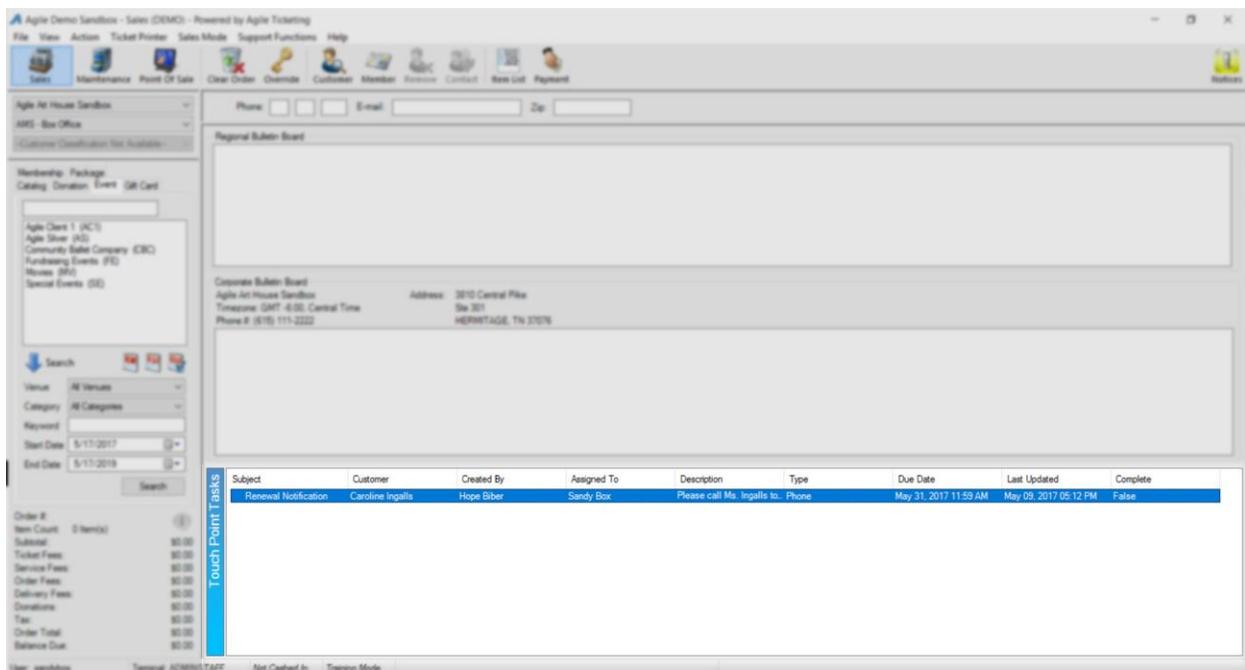
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9. Add any additional information about this task in the **Comments** area.



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.



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**.

