How do I…create and view Call Backs

In this tutorial I will show you how you can use a facility in the Diary to manage your phone calls on a day to day basis. It's called Call Backs and is a list of people you need to call. Once you have created a call back, in other words, made a note reminding yourself that you need to call someone, you can manage all your calls in one place. You can also create call backs for other people.

I'm going to start by creating a call back. You can do this in different ways – the simplest is to open a client or candidate record and click the Diary button next to the address. Choose 'Set call back' and fill in the details such as the time and date that you need to call the person. You can also set the priority level and set a reminder which will flash a notice up on your screen.

If you wish, you can enter in some notes about what you need to talk to them about. Ensure that the 'Make log entry' box is ticked if you wish the call back to appear in the person's log. If you want to make the call back for a colleague instead of yourself, click the 'Copy to' box and choose a name.

The other way to create a call back is when you have run a search using the Search & Mailings facility.

When you have run a search, for instance, for candidates you can then click on an entry in the results and click 'Set Call Back' on the ribbon which then opens the same window as before and you can enter the details of the call.

So now you know how to set up a call back, you need to know how to view and manage your list. Call backs are part of the Diary, so click the diary button along the bottom toolbar and then click the 'Call Backs' button.

By default you will see your call backs for this week but you can change the view to 'Today, previous, 10 days ahead, 30 days ahead' or list them all. If you click +10 or +30 days and then click it again and again, the view will keep moving forward by 10 or 30 days at a time. You can also use the calendar to show you specific dates or a range of dates.

The information shown to you on the Call Backs screen will help you make the call – for instance if you click on an entry, the log for this particular person will be shown at the bottom of the screen and the notes panel will show you the person's phone numbers and the notes you entered about what the call is regarding. This means that you can work through your list of today's calls without having to move screens, you can do it all from this window. If you need to move the call back forward, for example, if you call someone and they are out you can rearrange the call for another day by clicking the move button and adjusting the time or date, or you can simply drag the entry to another date on the calendar.

If you need to view a colleague's call backs, click the 'Others' button and then choose a name. The view will change to your colleague's list. To change back again, click the 'My Diary' button.

When you have called the candidate or client, you should make a record in the log to record what was said. Firstly, choose the type of log entry you want to make such a phone call or sales call and then either select a preset subject from the list or type your own. When the entry has appeared underneath, you can double-click on it to show you more information and add notes.

There is another way of viewing your call backs and you can find this in the Sales Calls page. This shows you the call backs laid out in a slightly different view and you can use either – they both work the same.

The only difference is that the Sales Calls view also shows you a mini record and you can print your list of call backs which might be useful if you are working away from the office as you can take the list with you. The other difference is that you can also mark the call you have made with a tick if you wish. To apply ticks, use the three icons on the ribbon. The first icon clears a tick, the second icon applies a tick to the selected calls and the last icon selects all the calls in the display.

So now you will be able to create a call back entry for yourself or someone else, and work through your list of calls, keeping records as you go.