

# iDeal Follow-up Tool

TAKING CONTROL & STREAMLINING FOLLOW-UP ACTIVITIES

When you have 5-10 opportunities or more to check on every day, follow-up becomes time consuming, tedious, and is sometimes missed. The iDeal Follow-up Tool:



Shows the opportunities you need to follow-up on and sends emails to those contacts



It automatically brings up all opportunities you have with that contact so you only email them once

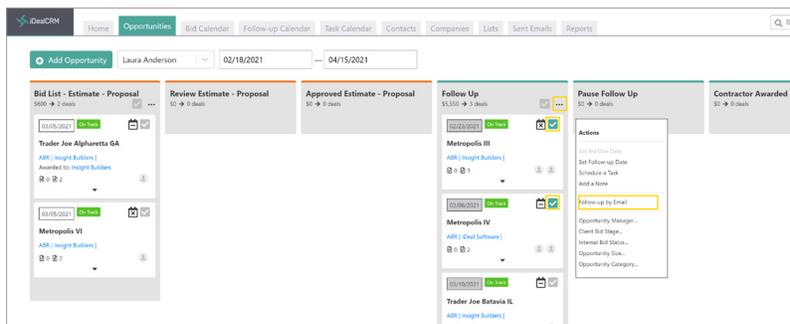


It automatically adds notes to opportunity & contact records

## HOW IT WORKS

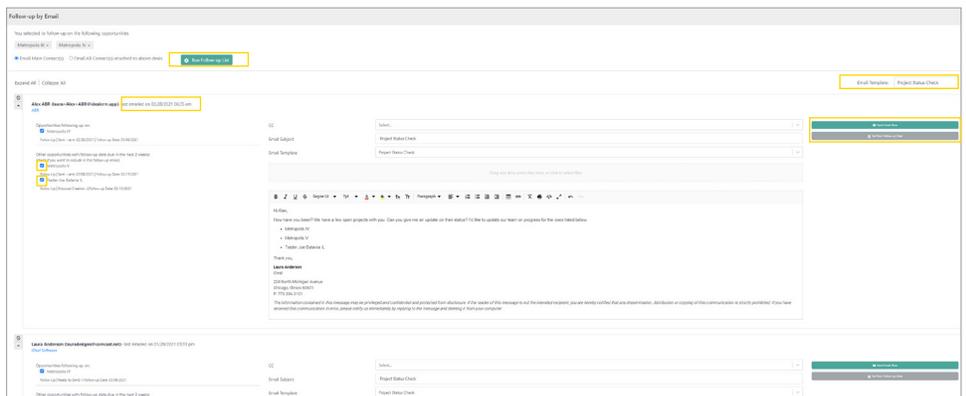
### On the Opportunities Board

1. Select the opportunities you want to follow-up on and click the ellipsis menu.
2. Select Follow-up via Email



### In the Follow-up Tool

1. Run Follow-up List
2. A list of contacts will appear
3. Select an Email Template
4. Next to each Contact you'll see when they were last emailed
5. For each Contact you will have a list of active opportunities so you can include all of them in 1 email
6. Click Send Email
7. After email is sent, you will be prompted to Set Next Follow-up Date. We highly recommend that you do



### Notes Are Automatically Added

1. On each Opportunity
  2. On each Contact record
- No additional work needed

