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|  | Playbooks New User Checklist |

**Name: Date:**

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| --- | --- |
|  | 1. Complete first-time setup: Menu > [Settings]
	* **Preferences:**
		+ Profile Image
		+ Role
		+ Desktop Notifications
		+ Side by Side mode
	* **CRM:**
		+ View: Select the object most relevant to your process
	* **Phone**
		+ Agent Number (Desk/Station Phone)
		+ Caller ID (Select Agent Number, or Local Presence)
		+ Disable CRM Click to Call
		+ Select Calling Territories
	* **Email**
		+ Email Signature (See steps below)
		+ Default to NerualSend
		+ CRM Click-to-Email
 |
|  | 1. **Email Signature Steps:**
	* Right click on image(s) in current email signature, then save on computer as ‘Portable Network Graphics’ type
	* Copy text portion of signature from outlook
	* Paste text Playbooks
	* Using the insert image icon, browse for and upload the desired photos. (Dimensions auto-populate) click OK
	* Save
 |
|  | 1. Add a single record to Playbooks and assign it to a Play.
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|  | 1. Complete the Play steps that are due for today. (If adding an account to Playbooks, make note of how to place a call to the desired contact.)
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|  | 1. Add multiple records to Playbooks from a Salesforce report.
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|  | 1. Complete all play tasks due today for all records added today.
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|  | 1. Mark a Play successful for one record. Then take any action necessary in Salesforce.
 |
|  | 1. Delete a record from Playbooks. Make note of how the Play Status field updates on the record in Salesforce.
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|  | 1. Enable CRM Navigation for Accounts. Then disable it. Decide which you prefer.
 |
|  | 1. Sort your tasks by Account Name. Then sort by Play and Step. Determine when you will use either sort option.
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|  | 1. Filter your tasks to focus on tasks due today. Make note of how you would filter to see tasks that are past due.
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|  | 1. Set the appropriate time zone settings in your task filters.
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|  | 1. Through the Playbooks panel, edit the phone number or email address for a Contact. (learn to do so from the Account in Playbooks, as well as a Person.)
 |
|  | 1. Open Playbooks Insights. Decide when it will be useful for you to use this feature.
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|  | 1. How many points do you currently have?
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|  | 1. Create at least one pre-recorded voice message
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