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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. |
|  | 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.) |
|  | 1. Add multiple records to Playbooks from a Salesforce report. |
|  | 1. Complete all play tasks due today for all records added today. |
|  | 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. |
|  | 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. |
|  | 1. Filter your tasks to focus on tasks due today. Make note of how you would filter to see tasks that are past due. |
|  | 1. Set the appropriate time zone settings in your task filters. |
|  | 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. |
|  | 1. How many points do you currently have? |
|  | 1. Create at least one pre-recorded voice message |