EZ Track & Remind Overview

EZ Track & Remind has been built with an easy to use interface that ties in several key Network Marketing/Sales aspects into one simple App. This is not just a calendar app with notifications, but a true app that prompts you to be active in your business and to continue to grow and invest into your Contacts. All Network Marketing/Sales businesses are people businesses. Without a consistent and persistent effort over time it makes it hard to be successful. That "activity" is difficult to continue using paper for all your information. This is why I have created this App.

The **Front Page** - This page displays all the main categories of the App. At the Top left is an Exit button that can be used to quickly exit the App.

All Contacts - this button opens you to all of the contacts in your App. At the top left is an icon (pic here) that will take you to the Front Page. The (pic here) plus sign will open up an create new contact page to enter a new contact.

The contacts are displayed in the order that you have entered your contacts from the earliest at the top, to the last contact you entered at the bottom. You can scroll through this list or you can click on the (bar) at the top and enter letters/numbers that would be included in your contacts name. As you enter the letters/number it will sort and display all matches. As you keep typing, it will narrow your search down to only those that exactly match what you enter.

Once you find a contact you want to work with, touch the displayed contact. The Contact will open up and you will see the info that you previously entered. The Description and Notes field will display a limited view of the info contained in that field. If you want to edit or view this contact, touch the UPDATE button at the top left of the screen. At this point, you can now edit any of the contained information.

You can also update the Time to Call areas with new information. Once you are done editing, you can hit the back key on your phone (you will be prompted to "Save and Exit" or "Exit without Saving". Instead of using the back key, you can hit the "Save" button. At this point you can hit the (pic here) key to go back one page to the contact screen.

Add New Contacts - This button allows you to add a new contact quickly. Once it opens, if you choose to add a photo, you can use the (pic here) by touching the icon. It will then prompt you to "Add Photo!" in which you can choose "Take Photo" which launches your camera, or you can choose "Choose from Gallery" which opens your photo gallery or "Cancel" to abandon adding a photo. You can go into your contact and add/change the photo at any time. Once you add a photo, there is a short pause as the program adds the photo, please be patient.

Most fields are self explanatory, but I will elaborate on a few:

Description - this field should be used to add items such as who the person is, where you met them, what car they drove, where they work, a distinguishing feature, etc.

Notes - this field should be used as a field you update every time you contact the Prospect. Each time you reach out to them, what the status was of that attempt (time, date, response of attempt). This will be your Tracking activity field. I personally start each line with the date and time so I can quickly see the pattern of contact.

Contact Type - This field defines what type of contact this is. Friend, Acquaintance, Business Related, Initial Contact, Referral, Consultant, Customer. At times this will change based on the contacts status. If they do not want to work your business with you, they may end up just being a customer at some point.

Contact Status - This status is used for some of the automatic reminders that you will be prompted with daily.

New Person- a new person that you have never followed up with at all
Said They Will Look - no explanation needed
Looked - they have looked but no decision yet
Call Me in ? - they asked you to call them back
Left Message - you called and left a message (call/text/email)
Not Interested - no explanation needed

Time To Call -

Set Time - set the time by touching on the hour, then the minutes, then the am/pm, then hit OK
Set Date - Set the Year, Month and Day, then hit OK

Contact Call Status - This field is important, as it defines your activity of trying to contact the Prospect. By default it will be set to: No contact yet. If the person has not been contacted yet, they will be in the group of the automatic reminders that will prompt you daily.

Once done, you can hit the SAVE button, or hit your phone's back key and you will be prompted to "Save and Exit" or "Exit without Saving".

TO DO List - This button will display all of today's appointments that you have previously scheduled as well as the 3 custom reminders (Call 1 Prospect that you have never called, Follow up with 1 that you need to follow up with, and Add 1 New Prospect to your list)

Calendar - The calendar will display all of your schedule calls/meetings. If you need to make changes to this, always make the changes through your Contact within this App. If you make changes to the Calendar directly, it will not update the contact info in the App.

Search Contacts - This button opens an area that you can search your contacts for specific information to quickly find who you are looking for.

Search by Name - this search will only search the first and last name field. Any match whatsoever to the data you input will display the matches immediately below your typing area. The more specific you can be will limit how many names are displayed.

Search by Notes / Description - this search will only search the Description and Notes field specifically. Any match whatsoever to the data you input will display the matches immediately below your typing area. The more specific you can be will limit how many names are displayed.

Review by Category - This button will allow you to do specific searches by Category type. If you want to see all of one Category (such as Friend), this is how you do it.

Configuration Settings - Under this area allows you to setup your reminder frequencies as well as backup/restore your data.

Websites - There are 2 customizable website links here. You can set them to whatever you want. The one that is not customizable is www.ambitstuff.com which is where I host these directions.