

Marketing Index and Office Jobs List

Adding jobs to the Marketing Index and Office Jobs

Office jobs list can be found in the magnifying glass, under work lists.

Marketing index can be found in CRM under task/jobs lists.

To request a task

Click request a new task, this will provide a list of template types available to choose from.

is the template number, the next column is which jobs list it refers to and the final column is the template title.

Click which template you would like to use and fill in the sections provided, where known.

For the Marketing List the “Allocate task to” must show as Catrin Hird to show on the marketing list, if adding a task in the Office Jobs list you can select any name for it to show – please note this does not allocate the job to that person it must be done when the job shows on the list.

When a job is created it will show at the bottom of the jobs list, you need to set a priority of how urgent the job is.

All jobs which are added to the Office jobs list need the issue log to be sent to Katie for review.

How to use the Marketing Index and Office Jobs List

Office jobs list can be found in the magnifying glass, under work lists.

Marketing index can be found in CRM under task/jobs lists.

Tasks based on these lists are to be completed in priority order from **top to bottom**, please **do not** cherry pick which job you would like to do, they must be done in order. If you cannot complete a job then go onto the next. If a director requires a job to be done urgently the priority must be agreed and changed including a deadline date where possible.

Each task has an issue attached and a breakdown of the stages (status report) which are required to be completed.

Type	Description	Priority	Deadline	Brief Notes	Requested On	Next Action	Issue Log	User in Control
#636	Ad-Hock	Retrieve Sale Or Return	Medium High		13/07/2016		74905	Status (0%)
#632	Send item on Sale Or Return	VM-2160 on SOR to SMC Ltd	Medium High	15/07/2016		12/07/2016	Katie Evans	74837
#645	Send item on Sale Or Return	MX300 on SOR737 to Manchester Royal Infirmary	Medium High	15/07/2016		13/07/2016		74951
#638	Distributor Search (Office)	Temperature Probe Distributors	Medium			Training/Instructions	Steve Nixon	74911 Status (0%)
#641	Distributor Search (Office)	Neomask: Distributors of Posey and Billband	Medium				13/07/2016	74922 Status (0%)
#530	Lost Customers	Automotive Sensor Lost Customers	Medium	30/05/2016	Follow up List	17/05/2016	Derek Lamb	71638 Status (85%)
#436	Distributor Search (Office)	OEM Patient Monitor Manufacturers with Pulse Oximetry	Medium	30/05/2016	Stage 1.2	09/02/2016	Steve Nixon	67297 Status (28%)
#474	Distributor Search (Office)	Medical Distributors - Estonia	Medium	01/06/2016	Stage 1.2	29/03/2016	Ryan Swaine	69097 Status (28%)
#475	Distributor Search (Office)	Medical Distributors - Latvia and Lithuania	Medium	30/06/2016	Stage 1.2	29/03/2016	Ryan Swaine	69098 Status (28%)
#618	Lost Customers	MAX-3 Customers who haven't converted to R-48V	Medium	29/07/2016	Export to DO	05/07/2016	Sarah Hawker	74359 Status (35%)
#622	Mailshot Packing	Alctruce - Maternity Departments	Medium	29/07/2016		07/07/2016		74483 Status (0%)
#623	Mailshot Packing	Oxygen Sensors Mailing - EBME	Medium	29/07/2016		07/07/2016		74484 Status (0%)
#624	Mailshot Packing	Radiant Warmers Mailshot - Theatres	Medium	29/07/2016		07/07/2016		74485 Status (45%)
#476	Distributor Search (Office)	Medical Distributors - Turkey	Medium	31/07/2016	Stage 1.2	29/03/2016	Ryan Swaine	69099 Status (28%)
#635	Create Mailing Group	Priory Group Hospitals	Medium	31/08/2016		13/07/2016		74904 Status (0%)
#612	Create Mailing Group	Aeroplane Technicians	Medium Low	31/07/2016			28/04/2016	Katie Evans 70645 Status (54%)

Click into the issue to see if there are any notes specific to this task.

Status Report

Click Status Report to be taken into the stages list, of tasks that need to be completed. It is the responsibility of the person within the office/marketing to update the ticked completed lines not the person completing the issue.

All tasks need to be completed for the job to be signed off – if there are tasks which you cannot complete then you can send an issue to them by pressing , this will then generate an issue number which can be clicked to go into the issue and assigned accordingly. If an issue has already been raised independently to the jobs lists then you can type the number in this field (picture right) and it will link. All issues and communication associated with the job must be linked or referenced in some way otherwise there is no way of knowing the current status. These notes must be kept up-to-date.





Waiting Action of:

'Waiting Action of' requires assigning once a task has been allocated to someone or is awaiting a response or action from someone. Any brief notes which are included in the above box will show on the front screen with the full list of outstanding jobs.

Once a stage has been completed the Check box needs to be ticked and any notes filled in, for example if a Sale or Return has been created this information needs to be included here i.e. SOR456.

STOP Progress

This box is only to be ticked if there is physically no one can continue the job. This will then show against the Status as an (S).

Issue Log and Action

When there are issues linked to stages within a job and another user issue the issue log or action will turn red, this is to show an update. Once viewed the updated issue it will turn back green.

69097	Status (28%)
69098	Status (28%)
74359	Status (35%)
74483	Status (0%)

updates the
you have

Break from template

Should a template be used for a job and then an additional task is required the job can be broken from template, when this button is clicked it will activate a white box underneath the current stages where the user can type in a new stage and 'Add New Stage'.

