

EZ Track & Remind Overview

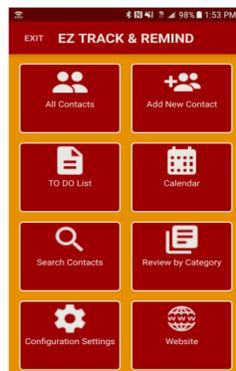
EZ Track & Remind has been built with an easy to use interface that ties in several key Network Marketing/Sales aspects into one simple App. This is not just a calendar app with notifications, but a true MLM/Sales App that prompts you to be active with your Contacts and to Prompt you to continue to grow your business. All Network Marketing/Sales businesses are people businesses and without continually adding to your people list you have no growth. Without a consistent and persistent effort over time, it will be hard to be successful. This “activity” is difficult to continue when using paper to track your information. This is why I have created this App.

If you are not in a business, but just need a great contact/schedule manager, the below features can be turned off and then you just have a fast scheduling/tracking App.

Key Features include automatic and customizable reminders for:

- 1) Call (1 or more) New Contacts a Day that you have never contacted previously
- 2) Follow up with (1 or more) Contact a day that you have not yet followed up with
- 3) Add (1 or more) new Contact(s) to your list daily
- 4) A TODO List that quickly shows your your daily tasks and appointments
(Quantities in quotes are individually customizable by you)

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 all of the Contacts you have entered. At the top left is an arrow that will take you back to the Front

Page. The  plus sign will open up a Create New Contact page to enter a new contact. You can also Search for

a specific Contact by touching the  button.

The contacts are listed in the order that you have entered them from the earliest at the top to the most recent contact at the bottom. You can scroll through this list or you can click on the icon at the top and enter letters/numbers that would be included in your contacts name. As you enter the letters/numbers, 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. Be careful when entering contact as if you misspell a name, it will be harder to find them.

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 all the info contained in those fields. At this point you can then just touch the Phone Number or Email to contact the person, or you can touch the Pencil at the top right of the screen to see the information in all the fields to add/change the info.

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 also. At this point you can hit the left arrow key to go back one page to the All Contacts screen.

Add New Contact -



This button allows you to add a new contact quickly. Once it opens, if you choose to add a photo, you can use the

icon. You will then prompt you to "Add Photo!" in which you have 2 choices. 1) "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 just by touching the photo. Once you add a photo, you will be prompted to crop the picture to the right size. There is a short pause as the program adds the photo, please be patient.

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

The **Description and Notes** fields are very important. Both are search fields, so your level of detail input should be high.

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, any distinguishing feature that will help you remember/find them later.

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. If you are using this app for more than just 1 business or for both business and personal items, I would start each entry with name of the business your contact is associated with, or even just the word "Personal".

An example would be: Ambit - 5-17-2017 - Left Message - asked him to call me Wed. night or
Personal - 5-18-17 Left Message - need to know if John can loan me his torque wrench for Saturday

Contact Type - This field defines what type of contact you have. At times this will change based on your contact with the person. If they do not want to work on your team, they may end up just being a customer at some point. "Initial Contact" is the default if you do not make a choice.

Initial Contact - This is default. Anyone in this field will be used for the "Call a New Contact" Notification.

Friend - self explanatory

Acquaintance - you know this person, but not business related or a friend

Business Related - you have done some sort of business with them

Referral - someone recommended you contact them

Consultant - they have joined you in your business

Customer - they have become your customer

Contact Status - This status is used for some of the automatic reminders that you will be prompted with daily. "New Person" is the default choice for this status.

New Person - a new person that you have never followed up with at all (used for "Call a New Contact" Reminder)

Said They Will Look - (make sure to set the date to call them back)

Looked - they have looked but no decision yet - (make sure to set the date to call them back)

Call Me in ? - they asked you to call them back - (make sure to set the date to call them back)

Left Message - you called and left a message (call/text/email) - (make sure to set the date to call them back)

Not Interested - not interested at this point, but you may have other reasons to contact in the future

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

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 “**Call a New Contact**” automatic reminders that will prompt you daily.

No Contact Yet - default

1st Call through 4th call - self explanatory

Over 5 Calls - self explanatory

Call back in? - self explanatory (make sure to set the date to call them back)

Scheduled to meet in person - self explanatory (make sure to set the date to call them back)

Schedule to discuss on phone - self explanatory (make sure to set the date to call them back)

Asked to not be contacted anymore - self explanatory

Once done, you can hit the **SAVE** button, or hit your back key and you will be prompted to “**Save and Exit**” or “**Exit without Saving**”.

Deleting of Contacts:

At the top right corner of the Contact screen, there is a Trashcan. If you want to delete your contact, touch the Trashcan, it will ask you twice if you are sure you want to delete. Make sure you are!

TO DO List -
below:



Once you click on this button, there is a tool icon which allows you to set the # of reminders

This **To Do List** button will display 4 button choices. Each button is described below:

CALL A NEW CONTACT - This coincides with the **Automatic Reminder** that looks into your **Contact Status** field. Any **Contact Status** field that is set to **New Person** will be displayed here. It will only display the number of Contacts that you designate under the **Tool Icon**. The default number is 1. It will always pull the oldest entry from the database first.

FOLLOW UP WITH A CONTACT - This coincides with the **Automatic Reminder** that looks into your Scheduled Meetings. Anyone that does not have a future scheduled time on the Calendar can be pulled for this Reminder. It will only display the number of Contacts that you designate under the **Tool Icon**. This always pulls the oldest entry from the database first.

ADD A NEW PERSON - This coincides with the Automatic Reminder to add 1 or more Contacts daily. If you have more than 1 set under the Tools Icon, then it will prompt you for that number. It also displays below the number still required for the day.

TODAY'S SCHEDULE - This pulls from your phone's/tablets calendar and will display your currently scheduled items.

Calendar -



The calendar will display all of your scheduled calls/meetings.

TODAY'S SCHEDULE - This will show all Contacts that have a scheduled appointment for today.

THIS WEEK - This will show all Contacts that have a scheduled appointment this week.

THIS MONTH - This will show All Contacts that have a schedule appointment for this month.

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 Name** and **Last Name** fields. Any match whatsoever to the data you enter will display the matches immediately below your typing area. The more specific you can be will limit how many names are displayed. Remember, if you misspell a name, you will not find it. It will only display exact matches of what you type in.

Search by Notes / Description - this search will only search the **Notes** and **Description** fields specifically. Any match whatsoever to the data you entered previously 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. You can first Choose the Category type, then choose the sub-type below.

Configuration Settings -



This area allows you to set your reminder frequencies as well as backup, restore, and print your Contacts database.

BACKUP - This area gives you two choices:

BACKUP DATA - Your data back will require you to setup a "google drive" account. It is a free account and you can safely keep 5 copies of your data here (by date) in case you loose or crash your phone. To keep it simple you should use your login that you created for your phone (gmail account). If you want, you can create a completely new gmail account also, this is up to you.

LOAD BACKUP DATA - This can be used if you want to recover an earlier backup. If you phone gets lost, damaged, or somehow you loose your data, it can be recovered once you redownload the app (send an email to me to request). Be careful, because this will overwrite everything in your current All Contacts area.

EXPORT TO PDF - This will export your complete database (no pictures) to a .PDF file (Adobe Acrobat) to your phone's storage. Each Contact will be on thier own page so that you can print out individually whichever you want.

EXPORT TO CSV - This will export your complete database (no pictures) to a .CSV file. For those of you who want to export your database to other programs (i.e. MS Excel or other), this will place the data into a format that can be imported.

CONFIGURE NOTIFICATIONS - You c an set a number to each of the 3 daily Notifications based on how "active" you want to be in your business. This can be changed daily if you want.

Time to show notifications - You can set the notifications to start at a certain time each day. The default is 8:00am.

MLM/SALES FEATURES- This is how you can turn off individual notifications.

Allow notifications on weekends - you can turn weekends off if you like, although weekends are the best time to find new Prospects!!!

Websites -



There are 3 website links here. Two of them are fixed; 1 to WWW.EZTRACKANDREMIND.COM, 1 To WWW.AMBITSTUFF.COM, and the 3rd is customizable to whatever you want it to be.

www.eztrackandremind.com is the website that hosts the directions on how to use this app as well as training videos, tips and tricks, and possible updates for future versions.

www.ambitstuff.com is my own personal website for my Network Marketing business in case you are interested or can be helped in your own business by this information.

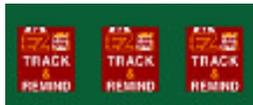
My Website - this is customizable by you to whichever website you want to get to quickly. Click on the link symbol in the top right of the screen to setup the website you would like to access.

Automatic Notifications - (can all be turned off if you just wish to use this App as a Personal Time Manager App)

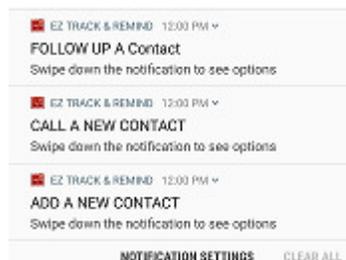
MLM/Sales Features:

There are 3 Customizationable Notifications are configurable under the Configuration Settings button, under Configure Notifications. The Notifications will start displaying each morning at 8:00 a.m., or whatever time you have chosen in the "Time to show notifications" field. Any or all of these can be turned off at any time.

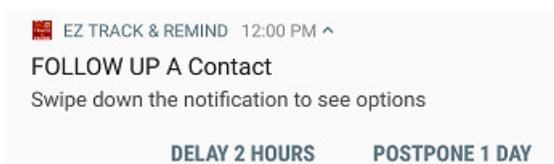
CALL A NEW CONTACT
FOLLOW UP WITH A CONTACT
ADD A NEW CONTACT



The above icons will show up in your phone/tablet's notification bar at the time you choose. You can then drag down the notification to choose your action. You have 3 choices for each notification. You can click on the notification to do the activity now, you can drag down, then Delay for 2 hours or Postpone 1 day. If you decide to Postpone for 1 day and then decide later in the day that you would like to perform that function now, just go to the To Do button and you can find the person there.



The Notifications will appear like this above, you can then drag each one down and you will then see the following:



You can either touch the reminder to perform it now, or choose one of the other choices.