

## 5.2 How to Schedule an Event

### Bright Pattern Documentation

Generated: 12/06/2021 2:39 pm

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## Table of Contents

Table of Contents	2
450px thumbnail center Type in the name of your contact	3
How to Schedule a Follow-up Activity	3

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## How to Schedule a Follow-up Activity

While talking to a customer or colleague, you can schedule follow-up activities related to your present call. For example, you can schedule an outbound call or email to confirm fulfillment of a customer's request.

To schedule a follow-up activity in the context of your current interaction, follow these steps:

1. In the *Contact Info Panel*, click the **Schedule follow-up activity** button . The dialog window and calendar that appear will have the available contact information (e.g., name and phone number) pre-filled for you.
2. Add missing contact information (e.g., email address) if necessary.
3. Enter the activity **Title** and **Notes**.
4. Specify the activity **Start** and **End** time, and set the **Reminder**.
5. Click **Save**.

Scheduled activities will appear in your personal calendar, and you will get reminders when those activities are due. For general information about the calendar and reminders, see section [How to Open the Calendar](#).



Follow-up activity details