

How to Enter and Maintain Activities

Description

To manage your activities, add Tasks and Events straight from the related record page (e.g., the Prospect, Resident, Marketing Event, etc.). The difference between a Task and an Event is that Tasks are to-do lists items, such as phone calls and emails, while Events are scheduled activities, such as tours and meetings.

The system will:

- Automatically add tasks and events to your Homepage.
- Add the activities to the related record page and related reports.

Note: Depending on your company's set-up, you may be permitted to delete all tasks/events, only tasks/events that have not been completed, or you may not be permitted to delete tasks/events at all. Regardless of permissions, it is strongly recommended that completed tasks are NOT deleted as these are essential for statistical analysis.

Step by Step

New Task

- Navigate to the Prospect's page on which you would like to record a Task. You may also add a task to other record pages, such as Residents and Marketing Events.
- 2 Hover over 'Open Activities' in the baby words and click **New Task**

erospect (Manny Crawford)				
In the show Feed 🕀 Follow				
Open Activiti	es 101 Activity History 101 1	Marketing Events Attended 10	Tour Planner (0) Mo	
Open Act	5	New	Task New Event	
No records	splay			

- **3** Specify Assigned To
- 4 Select a Task Activity Type. You may select *Call, Email, Information Package,* or *Mail*
- 5 Enter a descriptive Subject This is important as it is what appears on your Home Page!



6 Specify a **Due Date**

0

7 Enter any **Comments** related to the task

Note: In the Related Info section, the task is connected to this Prospect because it was created from the Prospect's profile page.

8 Click the box to set a **Reminder** if you would like this task to pop up on your screen for the time set before the task

9	Verify the dat	a and click Save					
	Task Information					=	Required In
	Assigned To	Larry Wieskopf		9	5		
	Task Activity Type	Call					
	Subject	Set Date for Tour		q	*		
	Due Date	10/17/2013 [10/17/2013]					
	Comments	Ask about granddaughter's first birthday		.::			
	Priority	High 💌					
	Completed Task Information	n (Select a Result to Complete the Task)					
	Result	🖓None 💌		Status	Not Started	*	
				Completed	[1	0/17/2013]	
	Related Info						
	Related To Name		CommunityID	iaRetirement -	GTA		
	Related To Phone #		Related To	Prospect		🖌 🖌 🖌	Amanda
	Related To Email		Name	Contacts and I	nfluencers 💌		9
	Send Notification Email						
	Reminder						
	Reminder	🗹 10/17/2013 8:00 AM 💌					

Completing a Task

- Open the task from your Homepage or by hovering over 'Open Activities' on the related record page
- 2 Scroll down to the Completed Task Information section and select a Result
- 3 You may add any additional comments to the Comments section. Comments related to the discovery questions on the Prospect profile page should be entered into the appropriate sections on the Prospect's page, rather than in the task's comments section.
- 4 Verify the data and click Save

Note: Status and Completed Date will be entered automatically and cannot be edited

Updated: October 17, 2013



Note: Tasks automatically move from 'Open Activities' to 'Activity History' upon completion

Completed Task Information (Select a Result to Complete the Task)			
Result 🤌 Call - Contacted 💌	Status Completed	Not Started	

New Event

- Navigate to the Prospect's page on which you would like to record an Event. You may also add an Event to other record pages, such as Residents and Marketing Events.
- 2 Hover over 'Open Activities' in the baby words and click New Event

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A Show Feed 🖶 Follow				
Open Activities [0] Activity History [0] Marketing Events Attended [0] Tour Planne				
Ор	en -	vities New Task New Event	t	
N	o recc	to display		

- **3** Specify Assigned To
- 4 Select an Activity Type. You may select *Tour* or *Meeting*. If *Tour* is selected, the system will flag it as First Tour, Second Tour, or Additional Tour, based on the Activity History for this Prospect. The **Tour Type** is displayed to the right of the **Activity Type** field and is read only.
- **5** Select a **Meal** if this event includes a meal

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- 6 Enter a descriptive and meaningful **Subject**. This subject will appear on your Homepage as well as on reports. Examples of effective subjects are: "Tour with Daughter" and "2nd Tour to Meet with Fitness Director".
- **7** Specify a **Start** date and time
- 8 Specify an **End** date and time
- 9 Enter an optional **Description**
- **10** Enter an optional **Location**
- You may choose to **Show Time As** *Busy, Out of Office,* or *Free* by selecting an option in the pick list provided
- **12** For a private activity, you may check off **Private**
- **13** Specify **Call to Confirm.** This is recommended if you want to create a task to call to confirm the meeting

Updated: October 17, 2013



- **1**4 Specify **Tour Follow-Up Date**
- 15 Click the box to set a **Reminder** if you would like this event to pop up on your screen for the time set before the event
- **16** Verify the data and click **Save**

Calendar Details		1 - 6
Auigned To	Larry Wieskopf	
Activity Type	Tour Tour Tipe	
Subject	Tour with Daughter	
Meal	Lunch	
start	10/17/2013 12:00 PM [11:44 AM]	
End	10/17/2013 1:00 PM [11:44 AM]	
Description	Daughter's name is Lydia	
Location		
Options		
Show Time Ar	Busy Private	
All Day Event		
Additional Tasks To Create For Tour		
Call To Confirm	10/16/2013 [10/17/2013]	
Tour Follow Up Date	10/21/2013 [1 <u>0/17/2013</u>]	
Completion		
Event Remuit	-None-	
Completed	[10/17/2013]	
Contact Information		
Related To	Prospect 🕑 Adamson, Amanda (/ 🕙 Nam* Contacts and Influencers 🎔	ي 🕄
Related To Name	Enall	
Related To Phone #	Phone	
Related To Binali	Communiții iaRetirement - GTA	

Completing an Event

- Open the event from your Homepage or by hovering over 'Open Activities' on the related record page
- 2 Scroll down to the Completion section and select an **Event Result**
- 3 You may add any additional comments to the **Comments** section. Comments related to the discovery questions on the Prospect profile page should be entered into the appropriate sections on the Prospect's page, rather than in the event's comments section.
- 4 Verify the data and click **Save**

Note: **Completed Date** will default to today's date and cannot be edited

Note: Events automatically move from 'Open Activities' to 'Activity History' when the event date and time has passed, even if no **Event Result** was filled in. <u>You must complete the event to ensure it is</u> <u>recorded in your statistics!</u>



Note: Rescheduled Tours. If a tour is rescheduled, the initial Event should be completed specifying "Rescheduled" as the Event Result, and a new Event created for the new date and time.

Completion		
	Event Result	Completed 🔽
	Completed	[<u>10/17/2013</u>]
<u> </u>		



NEW!

Now you can find key tour dates directly on the Prospect's profile page!

