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.

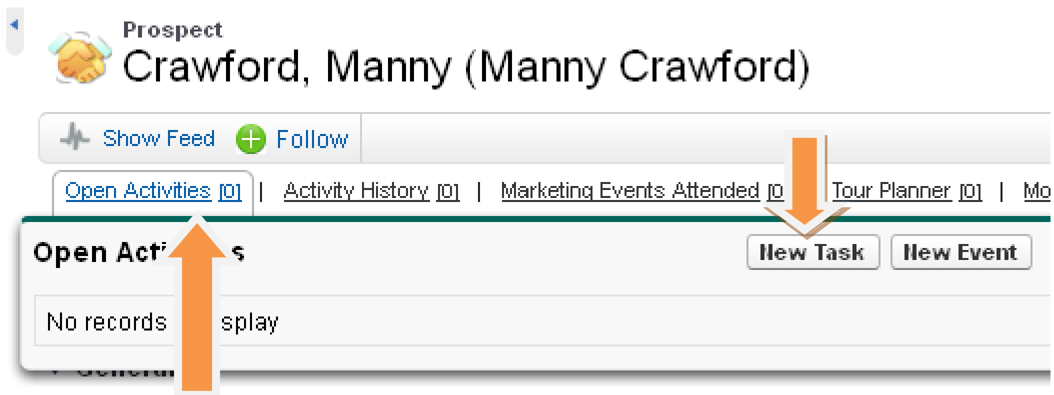
Note: Depending on your company's set-up, you may be permitted to delete all tasks/events, only tasks/events that have not been completed, or you may not be permitted to delete tasks/events at all. <u>Regardless of permissions, it is strongly recommended that completed tasks are NOT deleted as these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

Step by Step

New Task

1 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**



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!**

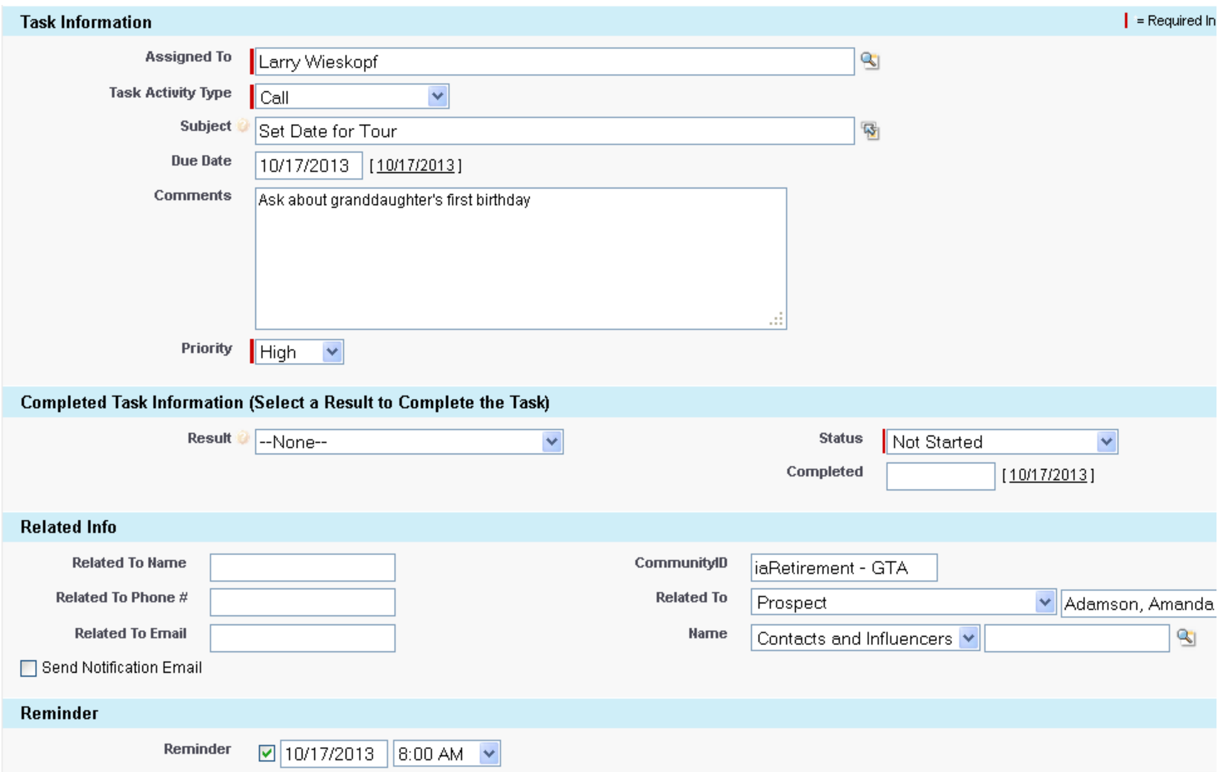
6 Specify a **Due Date**

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 data and click **Save**



Completing a Task

1 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**

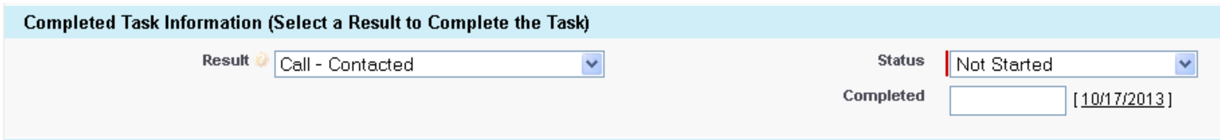
3 You may add any additional comments to the **Comments** section. Comments related to the discovery questions on the Prospect profile page should be entered into the appropriate sections on the Prospect's page, rather than in the task's comments section.

4 Verify the data and click **Save**

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

Updated: October 17, 2013

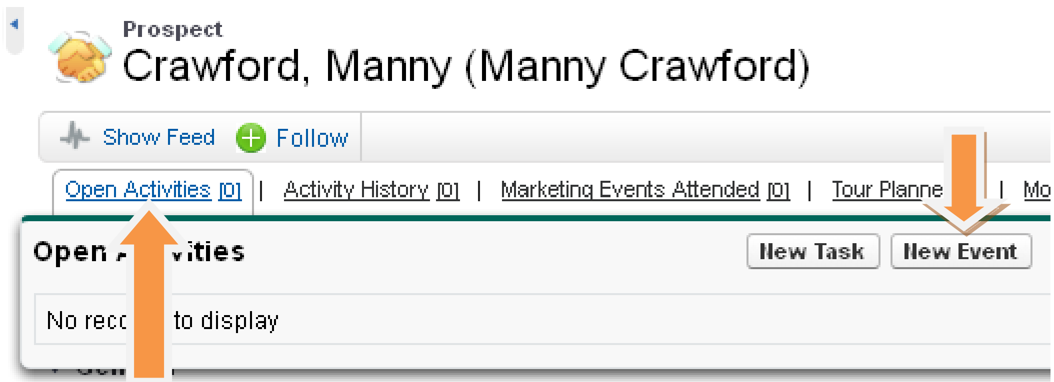
Note: Tasks automatically move from 'Open Activities' to 'Activity History' upon completion



New Event

1 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**



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

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**

11 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**

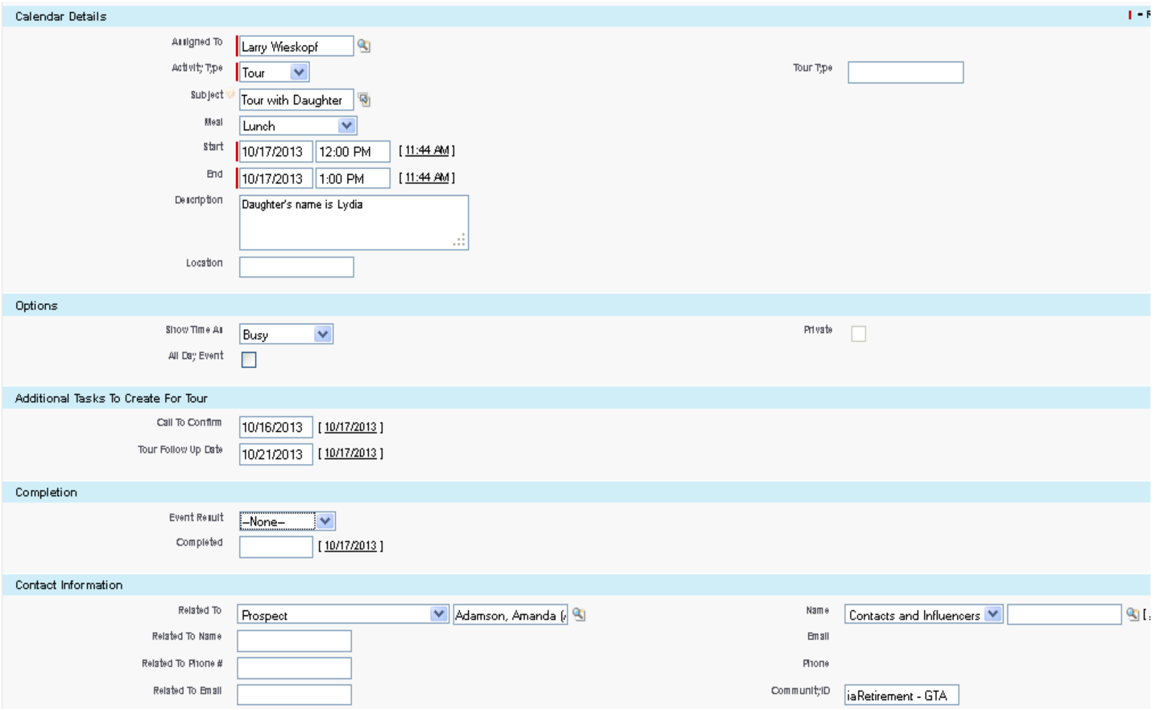
13 Specify **Call to Confirm.** This is recommended if you want to create a task to call to confirm the meeting

Updated: October 17, 2013

14 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**



Completing an Event

1 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**

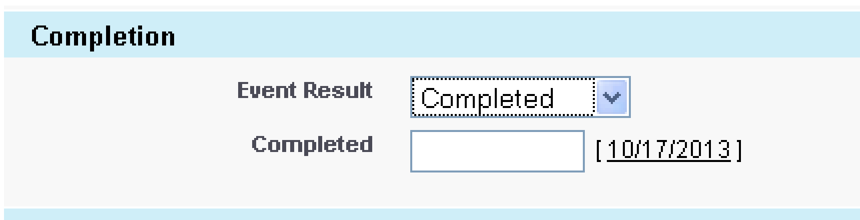
3 You may add any additional comments to the **Comments** section. Comments related to the discovery questions on the Prospect profile page should be entered into the appropriate sections on the Prospect’s page, rather than in the event’s comments section.

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 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.



NEW!

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