




How-To: Prospects without Activities Tab

Description

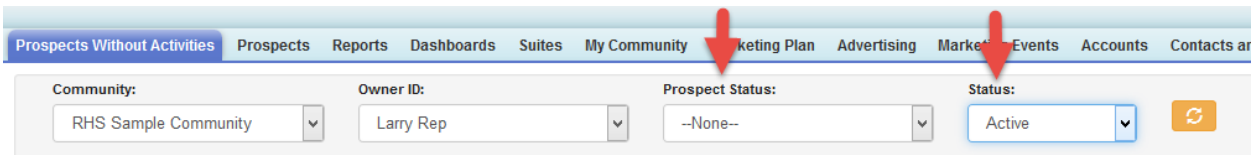
Navigate to the Prospects without Activities tab to see all active prospects who do not have an open *future* activity scheduled. Note that prospects with overdue activities who do not have a future activity will appear on this tab.

The system will:

-  Allow you to view, edit, and complete tasks and events on
-  Allow you to quickly and easily update the Prospect profile
-  Allow you to create a follow-up activity

Step by Step

- 1 Navigate to your **Prospects Without Activities** tab
- 2 At the top, you may select the **Prospect Status** or **Status** to filter certain Prospect records. To see Prospect records with no future activities, do not select a **Prospect Status** or **Status**





Community: RHS Sample Community | Owner ID: Larry Rep | Prospect Status: --None-- | Status: Active

- 3 On the left-hand side of your screen, you will see a list of prospects who do not have scheduled *future* activities. The task you are currently viewing will be highlighted in blue.

Note: Prospects who have overdue open activities will still appear on this list. The view shows prospects with no *future* activities.

- 4 On the right-hand side of your screen, you can view the Previous Activity logged on this Prospect's file

Previous Activity 2			
Subject	Type	Completed	Description
 Sent RVM Small Home Mailer		2014-09-11	
 Brunch invitation		2015-08-12	

- 5 The **Contact Information** section shows phone numbers and email from the Prospect file
- 6 To schedule a new task or event, click **New Task** or **New Event**

Contact Information	
Inquirer's Phone 1 (905) 777-8898	Email Address bill@smith.com
New Task	New Event

- 7 A new screen will pop up. Enter the Task or Event details. If you schedule a Task or Event that you have already completed, you can enter the **Result** on this screen. If you enter a **Result**, remember to click **New Task** or **New Event** to schedule a future activity.
- 8 Click **Save New Task & Prospect**

New Task:

Assigned To: Task Activity Type (Required):

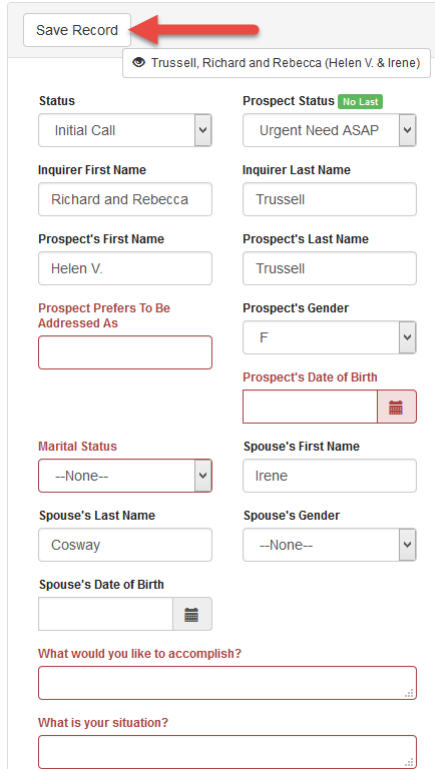
Subject (Required to Create):

Due Date Only (Required):

Description:

Result:

- 9 If you choose to complete a call while you are working on this screen, you can see a small section of the Prospect profile on the right-hand side of the screen. Enter information directly into the fields on this screen. Fields with missing information are highlighted in red.
- 10 After entering new information in the Prospect section, remember to click **Save Record**



Save Record

Trussell, Richard and Rebecca (Helen V. & Irene)

Status: Initial Call

Prospect Status: **No Last** Urgent Need ASAP

Inquirer First Name: Richard and Rebecca

Inquirer Last Name: Trussell

Prospect's First Name: Helen V.

Prospect's Last Name: Trussell

Prospect Prefers To Be Addressed As: [Red box]

Prospect's Gender: F

Prospect's Date of Birth: [Red box]

Marital Status: --None--

Spouse's First Name: Irene

Spouse's Last Name: Cosway

Spouse's Gender: --None--

Spouse's Date of Birth: [Red box]

What would you like to accomplish?: [Red box]

What is your situation?: [Red box]