# 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 and Call Manager
- 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

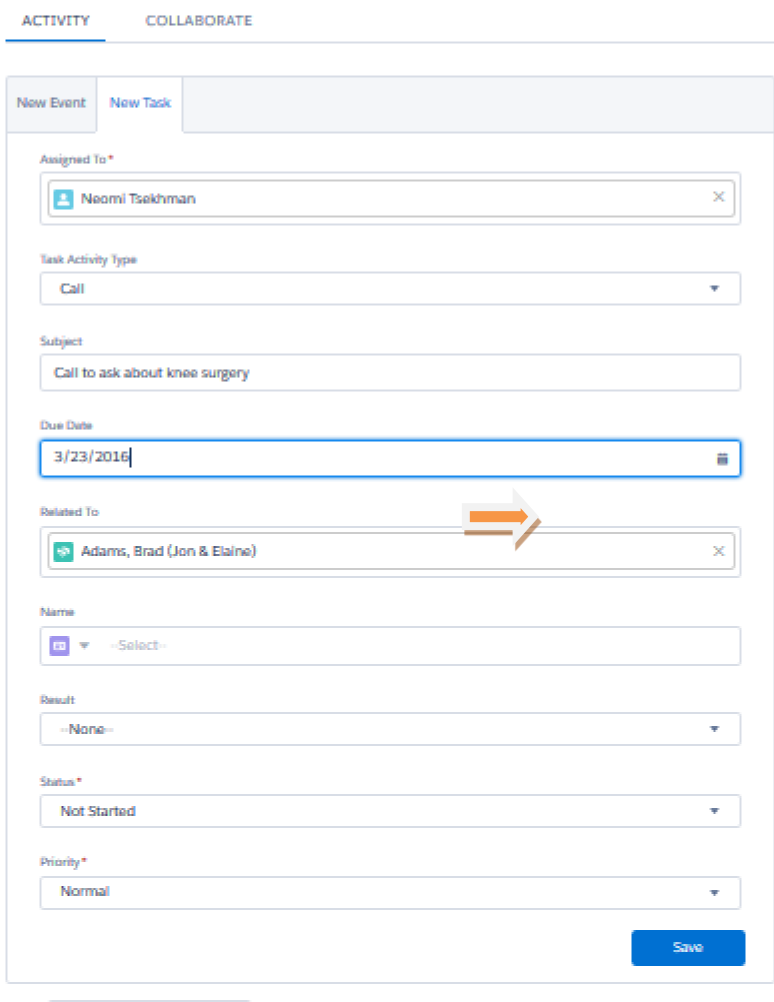
## New Task

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. On the right-hand side of your screen, click **New Task**
3. Specify **Assigned To**
4. Select a **Task Activity Type**
5. Enter a descriptive **Subject**
6. Specify a **Due Date**
7. The **Related To** field will auto-populate the name of the Prospect file that you are on
8. Verify the data and click **Save**

* Note: Once saved, the following fields on the task will default based on information on the prospect's file and the My Community file at the time the task was created

- Stage
- Prospect Status
- Community Phase as indicated on the My Community page

Updated: May 10, 2016



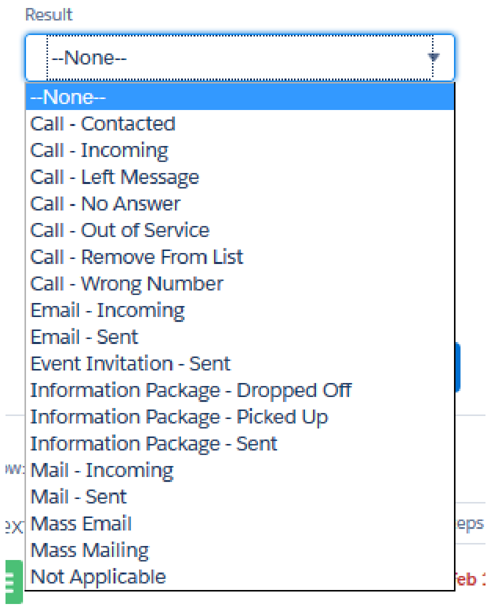

## Completing a Task

1. Open the task from your Homepage or by clicking on the task in the “Next Steps” section on the right-hand side of the Prospect’s file. You can also complete the task from the Call Manager (see “How to Use the Call Manager”).
2. Select a **Result**. Make sure to select a result that complements the Task Activity Type.
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

Note: Tasks automatically move from ‘Next Steps’ to ‘Past Activity’ upon completion

Updated: May 10, 2016




## 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 On the right-hand side of your screen, 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.

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 "$2^{nd}$ 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 Specify **Call to Confirm.** This is recommended if you want to create a task to call to confirm the meeting

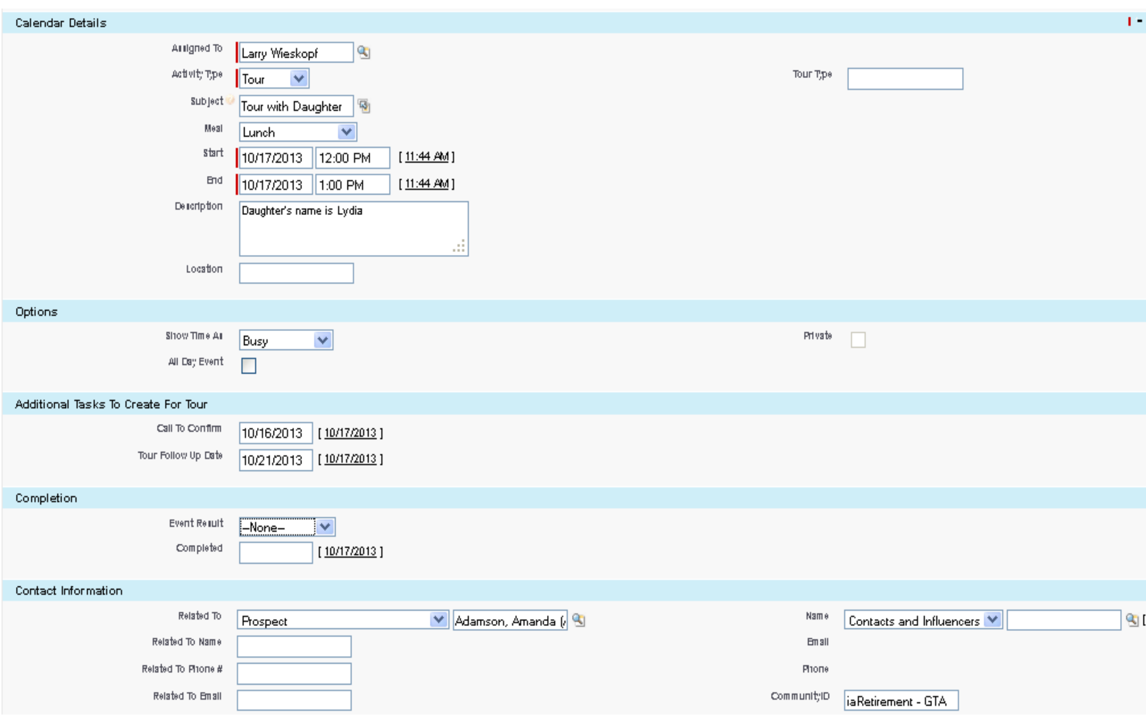
12 Specify **Tour Follow-Up Date**

13 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

**14** Verify the data and click **Save**

* Note: Once saved, the following fields on the event will default based on information on the prospect's file and the My Community file at the time the task was created

- Stage
- Prospect Status
- Community Phase as indicated on the My Community page




## 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**

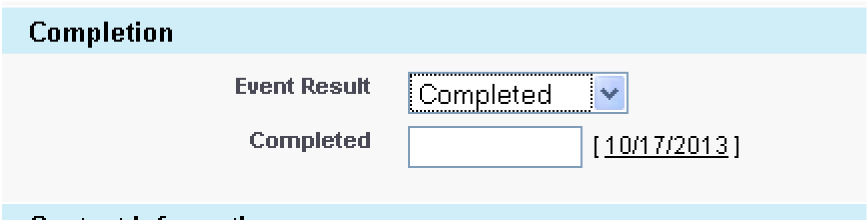
**3** You may add any additional comments to the **Comments** section. Comments related to the discovery questions on the Prospect profile page should be entered into the appropriate sections on the Prospect's page, rather than in the event's comments section.

**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!