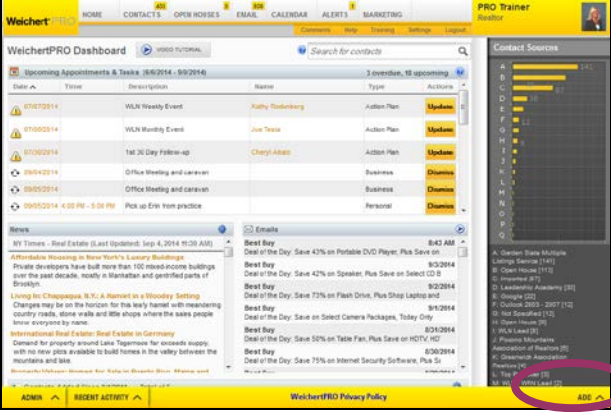
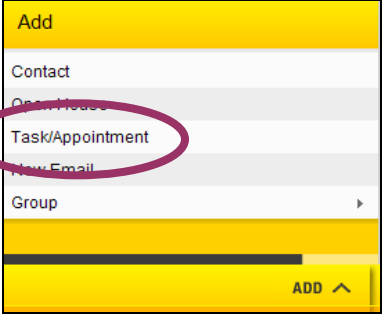
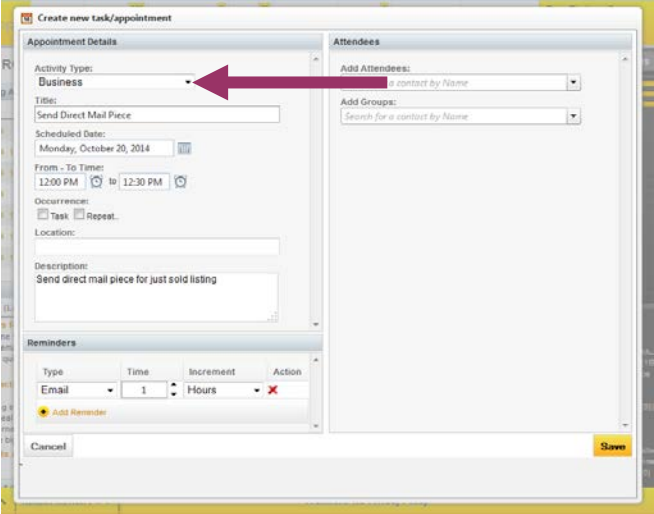


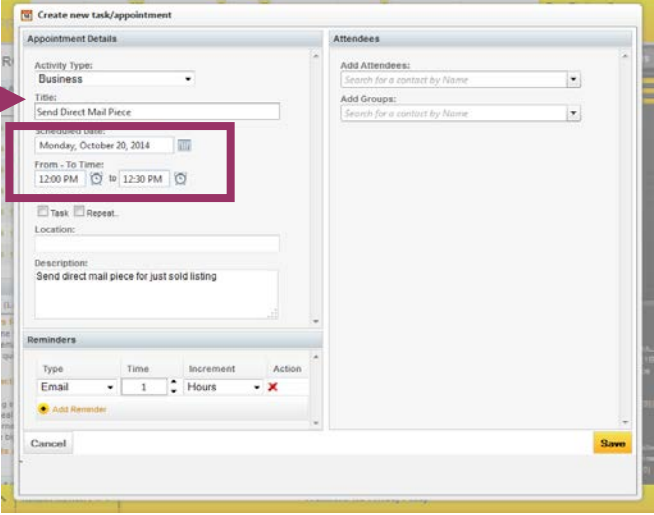
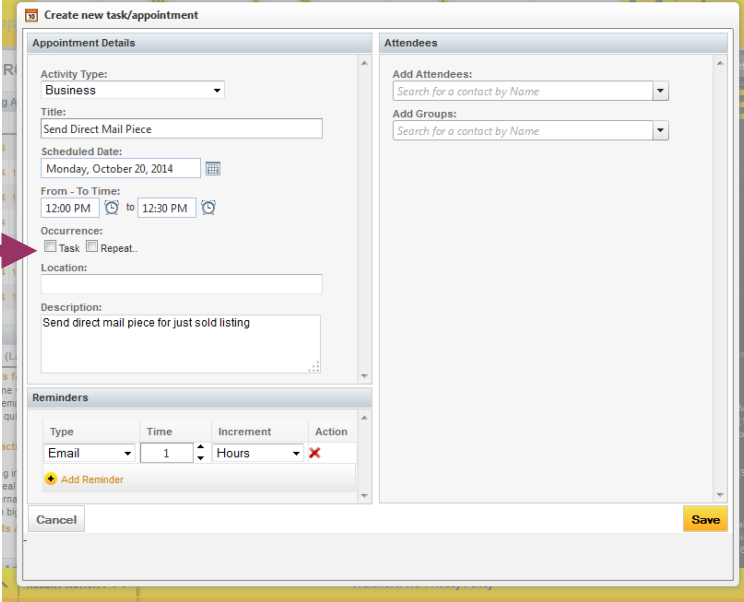
WeichertPRO Job Aid – Create a single appointment or task

The calendar feature in WeichertPRO is a powerful tool that utilizes appointments and tasks to help you manage your day. Appointments take place on a specific day and time. Tasks are to-do items that are scheduled to get done on a specific day, but are time-flexible. The goal, is to mark everything complete by the end of the day.

Add an Appointment or Task to Your Calendar

STEP	SCREEN
<p>1. Go to: www.weichertpro.com and log in</p> <p>2. From the bottom toolbar click "Add".</p>	
<p>A new menu will open.</p> <p>3. Select "Task/Appointment"</p>	
<p>The "Create new task/appointment" window will open</p> <p>4. Select an 'Activity Type' from the drop down menu.</p> <p>Each activity type is associated with a color that will appear on your WeichertPRO calendar.</p>	

WeichertPRO Job Aid – Create a single appointment or task

STEP	SCREEN
<p>5. Type a required "Title" for your appointment or task.</p> <p>6. Select a date and time for your appointment or task.</p>	
<p>7. If you are scheduling a task, select "Task" in the "Occurrence" field.</p> <p>REMINDER: Tasks are not time bound and will appear at the top of your calendar for the day it is scheduled.</p>	
STEP	SCREEN

WeichertPRO Job Aid – Create a single appointment or task

8. Select a reminder to be sent to your Email, as a text or as an alert in WeichertPRO. To add reminders click 'add reminders'

It is recommended reminders be set for any appointment or task to keep you on top of your day.

The screenshot shows the 'Create new task/appointment' dialog box. The 'Appointment Details' section includes fields for Activity Type (Business), Title (Send Direct Mail Piece), Scheduled Date (Monday, October 20, 2014), and From - To Time (12:00 PM to 12:30 PM). The 'Reminders' section has a table with columns for Type, Time, Increment, and Action. The 'Email' type is selected, and the 'Add Reminder' button is highlighted with a red arrow. Another red arrow points to the 'Add Reminder' button.

9. Click Save

The screenshot shows the 'Create new task/appointment' dialog box. The 'Save' button is highlighted with a red arrow.

Additional Resources:

- For Technical Questions: Call the Help Desk at 973 605 1619
- Or email at: CRMhelp@weichert.com
- For additional WeichertPRO training and our a library of video tutorials visit: WeichertPRO.com → Training