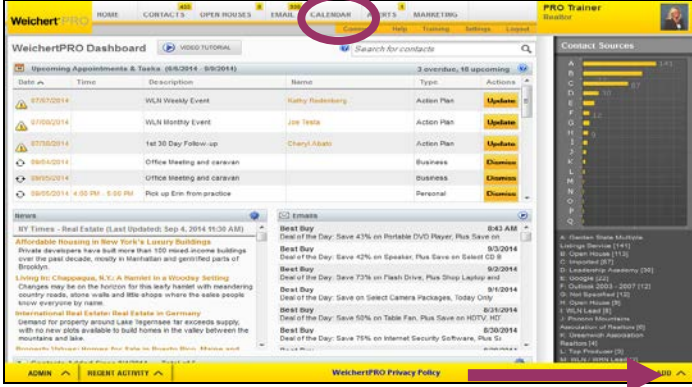
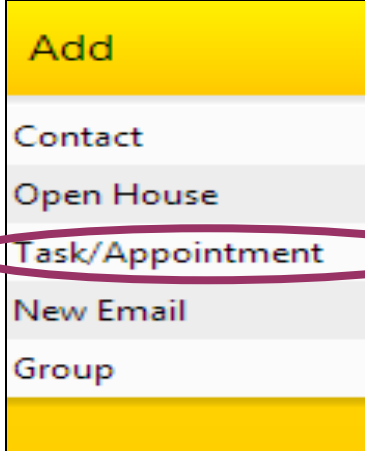


WeichertPRO Job Aid – Book an appointment and send an email invitation

WeichertPRO allows you to schedule and book appointments with any of your contacts and groups in WeichertPRO and send an email invitation for the appointment. This is a quick and easy way to confirm with your contacts about an agreed upon meeting or send a meeting request. When your contact accepts the invitation, it will be written to their electronic calendar and you will receive an email letting you know.

Book an appointment and send an email invitation to attendee(s)

STEP	SCREEN
<p>1. Go to: www.weichertpro.com and log in</p> <p>2. Click 'Add'</p>	 <p>The screenshot shows the WeichertPRO dashboard interface. At the top, there is a navigation bar with several icons. The 'Add' icon, which is a plus sign, is circled in red. Below the navigation bar, there is a section for 'Upcoming Appointments & Tasks' with a table listing various events. To the right, there is a 'Contact Sources' sidebar. At the bottom of the dashboard, there is a yellow bar with the text 'WeichertPRO Privacy Policy' and an 'Add' button with a red arrow pointing to it.</p>
<p>A new menu opens.</p> <p>3. Click 'Task/Appointment'</p>	 <p>The screenshot shows a vertical dropdown menu with a yellow background. The menu items are: 'Add', 'Contact', 'Open House', 'Task/Appointment', 'New Email', and 'Group'. The 'Task/Appointment' option is circled in red.</p>

WeichertPRO Job Aid – Book an appointment and send an email invitation

The 'Create a new task/appointment' worksheet opens

4. Enter the details of the appointment.

'Title' will appear in the subject line of your email invitation

'Description' will appear in the message of your email invitation

The screenshot shows the 'Create new task/appointment' dialog box. The 'Appointment Details' section is filled with: Activity Type: Business; Title: Send Direct Mail Piece; Scheduled Date: Monday, October 20, 2014; From - To Time: 12:00 PM to 12:30 PM; Occurrences: Task (checked), Repeat (unchecked); Location: (empty); Description: Send direct mail piece for just sold listing. The 'Reminders' section shows: Type: Email; Time: 1; Increment: Hours; Action: (red X). The 'Attendees' section has search fields for 'Add Attendees' and 'Add Groups'. Buttons for 'Cancel' and 'Save' are at the bottom.

STEP

SCREEN

5. 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 to keep you on top of your day.

The screenshot is identical to the one above, but a red arrow points to the 'Add Reminder' button in the 'Reminders' section.

WeichertPRO Job Aid – Book an appointment and send an email invitation

6. Select your attendee(s). Click the drop down arrow for a list of your attendees or start typing their name in the text box.

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 'Attendees' section has two dropdown menus: 'Add Attendees' and 'Add Groups', both with search prompts. A red arrow points to the 'Add Attendees' dropdown. The 'Reminders' section shows a table with columns for Type, Time, Increment, and Action, with an 'Email' reminder set for 1 hour. 'Cancel' and 'Save' buttons are at the bottom.

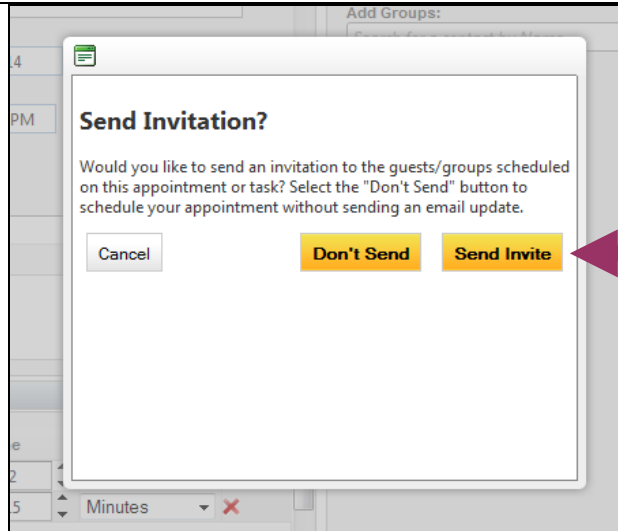
7. Click Save

This screenshot is identical to the one above, showing the 'Create new task/appointment' dialog box. A red arrow points to the 'Save' button in the bottom right corner. The 'Appointment Details' and 'Attendees' sections are visible, with the same data as in the previous screenshot.

WeichertPRO Job Aid – Book an appointment and send an email invitation

You will be prompted to send an email invitation.

8. Click 'Send Invite' to send an email invitation to your attendee. Click 'Don't Send' if you choose not to send an email invitation



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