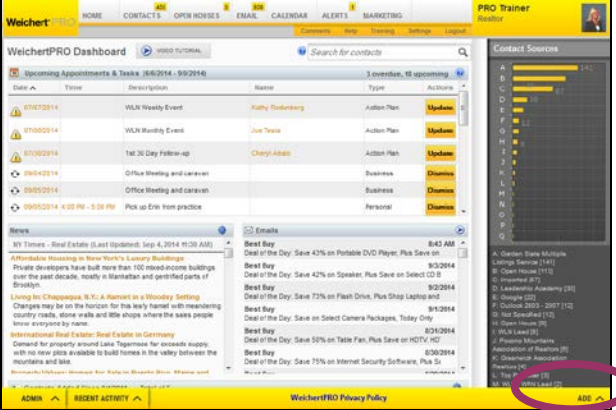
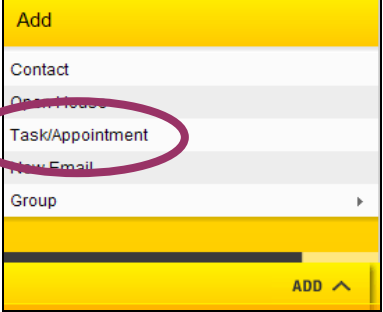


WeichertPRO Job Aid – Create Custom Action Plans and/or Recurring appointments for contacts and groups

In WeichertPRO we use recurring events to create custom action plans for your contacts or groups. This job aid will review how to create a custom action plan for a group of prospecting contacts to create a call list. Then, track your results. Scheduling time on your calendar for follow up with all your prospecting groups is necessary to lead your day

Add an Appointment or Task to Your Calendar

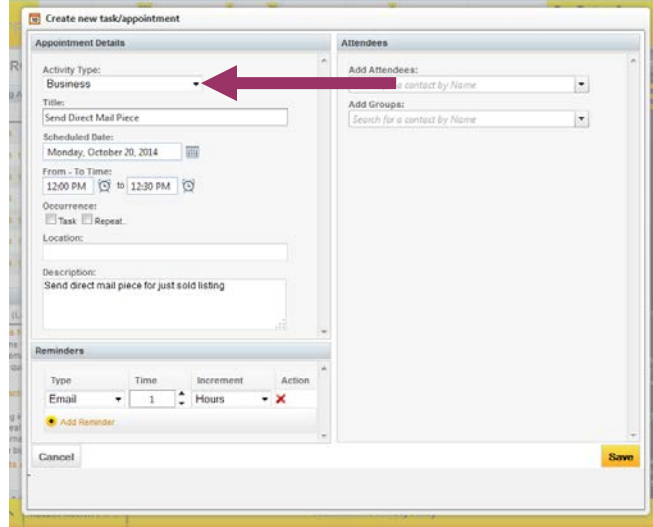
STEP	SCREEN
<p>1. Go to: www.weichertpro.com and log in</p> <p>2. From the bottom toolbar click "Add".</p>	
<p>A new menu will open.</p> <p>3. Select "Task/Appointment"</p>	

WeichertPRO Job Aid – Create Custom Action Plans and/or Recurring appointments for contacts and groups

The “Create new task/appointment” window will open

4. Select an ‘Activity Type’ from the drop down menu.

Each activity type is associated with a color that will appear on your WeichertPRO calendar.

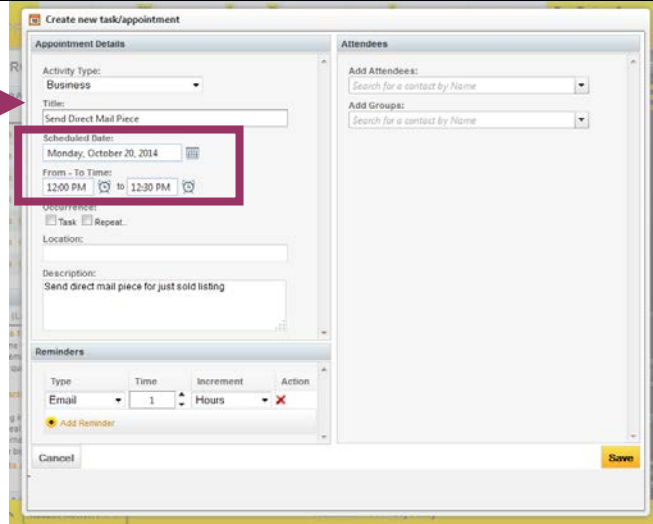


STEP

SCREEN

5. Type a required “Title” for your appointment or task.

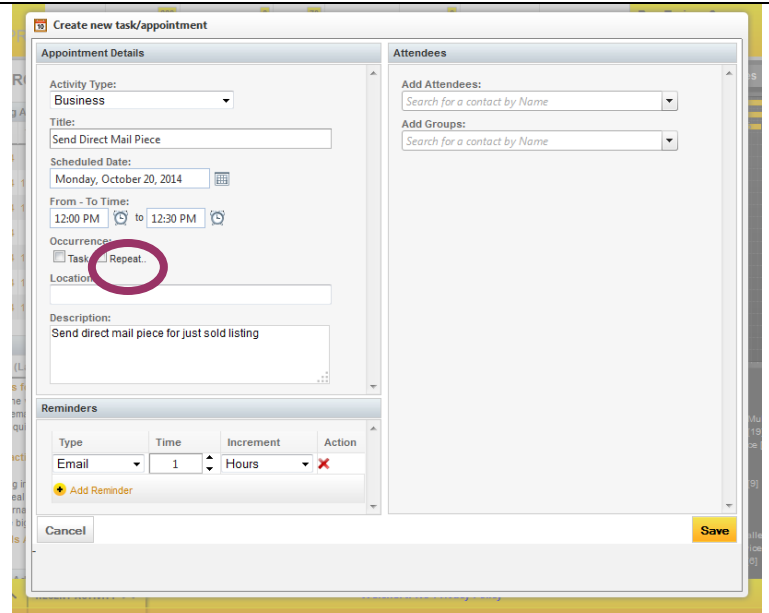
6. Select a date and time for your appointment or task.



WeichertPRO Job Aid – Create Custom Action Plans and/or Recurring appointments for contacts and groups

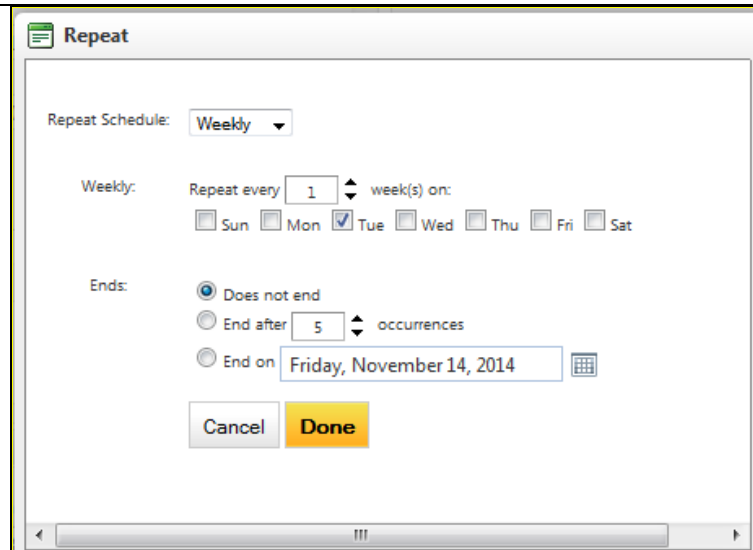
7. Click Repeat

REMINDER: you are creating a recurring event in your calendar.



A new window will open.
Complete the details.

In this example we scheduled weekly prospecting calls to occur every Tuesday with no end date



STEP

SCREEN

WeichertPRO Job Aid – Create Custom Action Plans and/or Recurring appointments for contacts and groups

8. Enter a description

9. 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), From - To Time (12:00 PM to 12:30 PM), Occurrences (Task/Repeat), Location, and Description (Send direct mail piece for just sold listing). The 'Reminders' section has a table with columns for Type, Time, Increment, and Action. The first row shows 'Email' with a time of 1 and an increment of Hours. There is an 'Add Reminders' button below the table. The 'Attendees' section has 'Add Attendees' and 'Add Groups' dropdown menus. A red arrow points to the 'Add Reminders' button, and another red arrow points to the 'Email' reminder type.

From Attendees, Click the down arrow to select your prospecting group.

This screenshot is identical to the one above, but a red arrow points to the down arrow of the 'Add Groups' dropdown menu in the 'Attendees' section.

WeichertPRO Job Aid – Create Custom Action Plans and/or Recurring appointments for contacts and groups

10. Click Save

Appointment Details

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 Repeat

Location:

Description: Send direct mail piece for just sold listing

Reminders

Type	Time	Increment	Action
Email	1	Hours	X

Attendees

Add Attendees: Search for a contact by Name

Add Groups: Search for a contact by Name

Cancel Save

You will be asked if you want to send an email invitation to the group.

11. Click Don't SEND

Because this is simply a reminder on YOUR calendar for you to follow up, you DO NOT want to send an email invitation.

This is very important to remember because you do not want your prospecting group to receive an email invitation for this event.

Appointment Details

Activity Type: Business

Title: FSBO Prospecting

Scheduled Date: Tuesday, October 14, 2014

From - To Time: 10:00 AM to 12:00 PM

Occurrences: Task Repeat. Every 1 week

Location:

Description:

Reminders

Type	Time	Increment	Action
Email	30	Minutes	X
Txt Msg	30	Minutes	X

Attendees

Add Attendees: Search for a contact by Name

Add Groups: FSBO

Cancel Save

Send Invitation?

Would you like to send an invitation to the guests/groups scheduled on this appointment or task? Select the "Don't Send" button to schedule your appointment without sending an email update.

Cancel Don't Send Send Invite

WeichertPRO Job Aid – Create Custom Action Plans and/or Recurring appointments for contacts and groups

TRACK YOUR RESULTS

You will find the event on your upcoming appointments and tasks section reminding you to take action.

12. When it's time to take action on your follow up reminder, click update.

An automatic call list will be generated for everyone in the group.

Work your list and enter detailed notes.

Book follow up appointments.

13. Click Update

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**