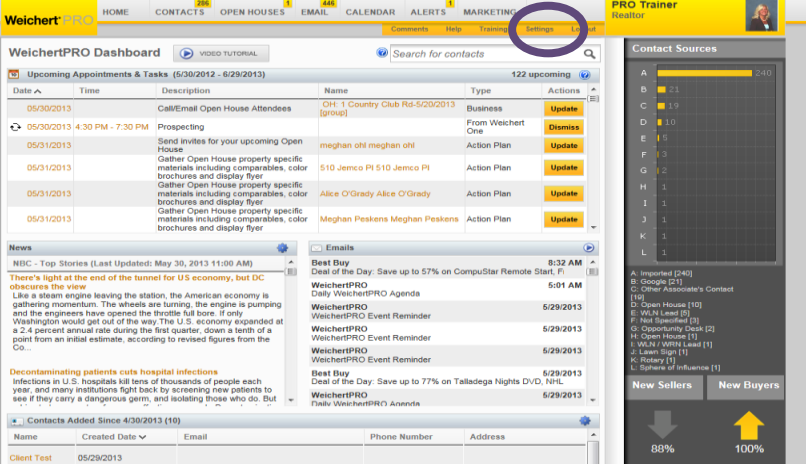
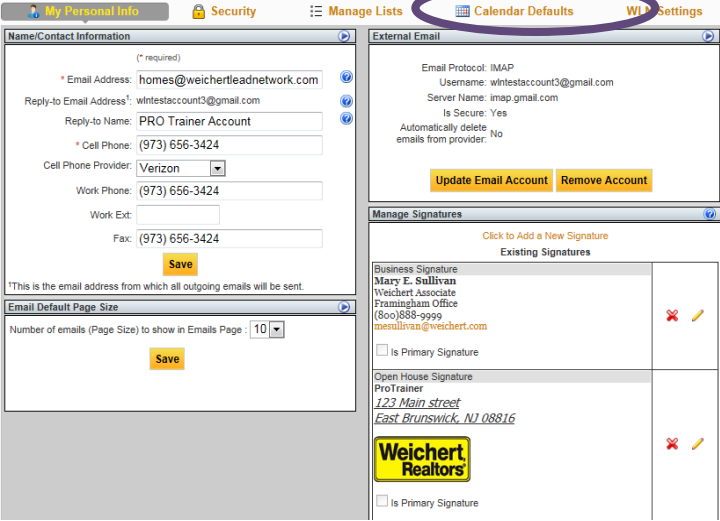


WeichertPRO Job Aid – Calendar Defaults Setup

As a first-time user to WeichertPRO, there are a few things you will need to set up to ensure you get the most of WeichertPRO. This job aid will show you how to set up your Calendar Defaults from your 'Settings' link. These settings can be changed at any time.

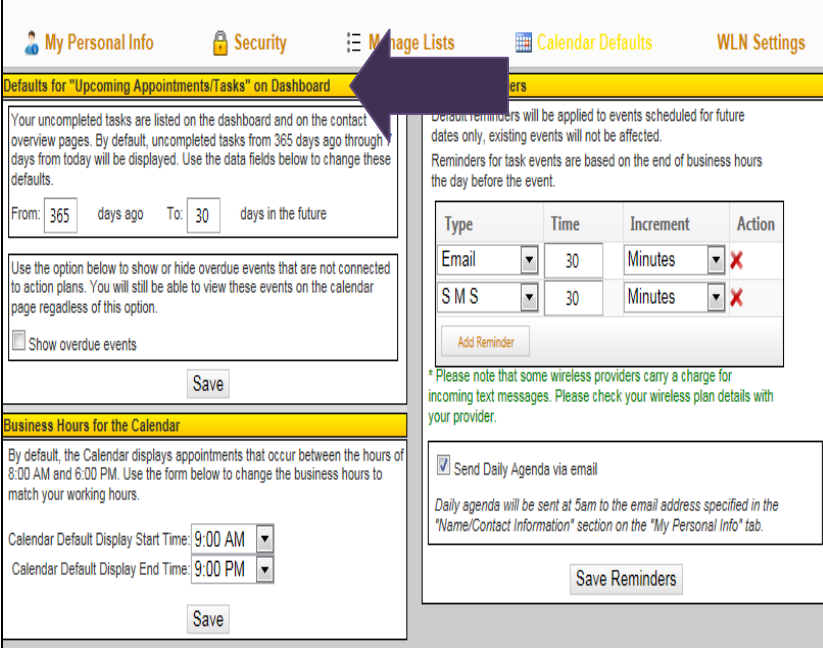
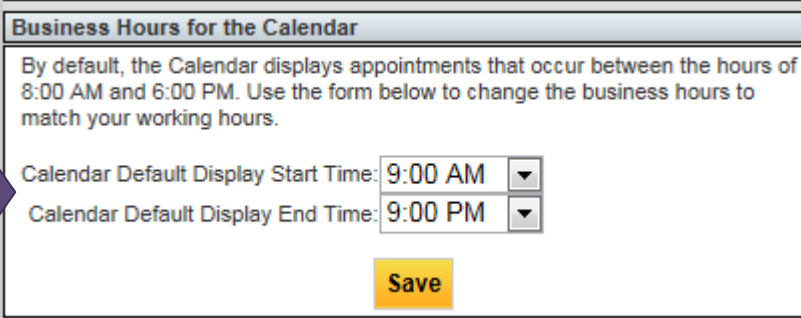
Calendar Defaults Setup

STEP	SCREEN
<p>1. From the Home screen, click "Settings"</p>	 <p>The screenshot shows the WeichertPRO Dashboard. At the top, there is a navigation bar with links for HOME, CONTACTS, OPEN HOUSES, EMAIL, CALENDAR, ALERTS, MARKETING, and Settings. The 'Settings' link is circled in purple. Below the navigation bar, there are sections for 'Upcoming Appointments & Tasks', 'News', and 'Emails'. On the right side, there is a 'Contact Sources' sidebar with a list of sources and a 'New Sellers' / 'New Buyers' section at the bottom.</p>
<p>The Settings screen displays</p> <p>2. Locate the Calendar Defaults Section.</p>	 <p>The screenshot shows the 'Settings' screen. At the top, there is a navigation bar with links for My Personal Info, Security, Manage Lists, Calendar Defaults, and WLN Settings. The 'Calendar Defaults' link is circled in purple. Below the navigation bar, there are sections for 'Name/Contact Information', 'External Email', and 'Manage Signatures'. The 'Name/Contact Information' section includes fields for Email Address, Reply-to Email Address, Reply-to Name, Cell Phone, Cell Phone Provider, Work Phone, and Work Ext. The 'External Email' section includes fields for Email Protocol, Username, and Server Name. The 'Manage Signatures' section includes a list of existing signatures and a 'Click to Add a New Signature' button.</p>

Continued on Next Page

WeichertPRO Job Aid – Calendar Defaults Setup

Calendar Defaults Setup, continued

STEP	SCREEN
<p>3. Locate the Defaults for “Upcoming Appointments/Tasks” on the Dashboard section.</p> <p>This is where you would set the “From” and “To” days for your uncompleted tasks listed on the dashboard and on the contact overview page. By default, uncompleted tasks from 365 days ago through 7 days from today will be displayed.</p> <p>4. Enter your ‘from’ and ‘to’ dates using the data to change the defaults.</p> <p>Optionally you can choose to show or hide overdue events that are not connected to action plans by checking the box.</p> <p>5. Select ‘save’.</p>	
<p>6. Set your Business Hours for the Calendar display by setting the start and end time using the pull-down menu.</p> <p>7. Select ‘save’.</p>	

WeichertPRO Job Aid – Calendar Defaults Setup

Calendar Defaults Setup, continued

STEP	SCREEN												
<p>To set your Calendar Default Reminders, go to the Default Reminders window.</p> <p>8. Select the type of reminder you would like by using the pull down menu.</p> <p>Your options consist of Email, SMS (text message) and Alert (which appears in the WeichertPRO system).</p> <p>9. Set the time and increment accordingly.</p> <p>10. Check the 'send daily agenda via email' box to have your daily reminder sent to you via your email address.</p> <p>11. Select 'Save Reminders'.</p>	<p>Default Reminders</p> <p>Default reminders will be applied to events scheduled for future dates only, existing events will not be affected.</p> <p>Reminders for task events are based on the end of business hours the day before the event.</p> <table border="1"> <thead> <tr> <th>Type</th> <th>Time</th> <th>Increment</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Email</td> <td>30</td> <td>Minutes</td> <td>X</td> </tr> <tr> <td>S M S</td> <td>30</td> <td>Minutes</td> <td>X</td> </tr> </tbody> </table> <p>+ Add Reminder</p> <p>* Please note that some wireless providers carry a charge for incoming text messages. Please check your wireless plan details with your provider.</p> <p><input checked="" type="checkbox"/> Send Daily Agenda via email</p> <p>Daily agenda will be sent at 5am to the email address specified in the "Name/Contact Information" section on the "My Personal Info" tab.</p> <p>Save Reminders</p>	Type	Time	Increment	Action	Email	30	Minutes	X	S M S	30	Minutes	X
Type	Time	Increment	Action										
Email	30	Minutes	X										
S M S	30	Minutes	X										

Additional Resources:

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