

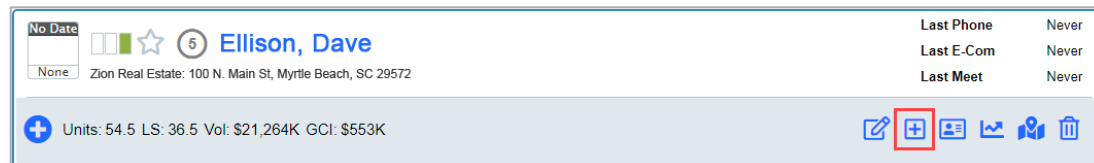
Adding an Activity to a Prospect


iProspect allows you to document the recruiting activities that you've completed for each of your prospects. The activities that are entered help you track progress towards the recruiting goals that you've set.

There are multiple methods for beginning the process of adding your recruiting activities.

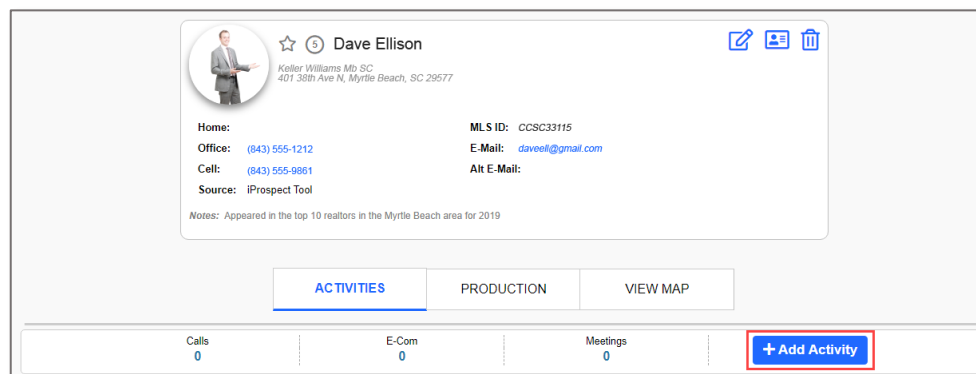
Choose one of the options on the right:


- From the iProspect dashboard, click the **Add Activity** icon .



No Date Last Phone Never
Last E-Com Never
Last Meet Never
 None Zion Real Estate: 100 N. Main St, Myrtle Beach, SC 29572
 Units: 54.5 LS: 36.5 Vol: \$21,264K GCI: \$553K 

- From the Prospect's Profile page, click the **+ Add Activity** button .



Dave Ellison
 Keller Williams Mb SC
 401 30th Ave N, Myrtle Beach, SC 29577
 Home: (843) 555-1212
 Office: (843) 555-1212
 Cell: (843) 555-9861
 Source: iProspect Tool
 MLS ID: CCSC33115
 E-Mail: daveell@gmail.com
 Alt E-Mail:
 Notes: Appeared in the top 10 realtors in the Myrtle Beach area for 2019
 ACTIVITIES PRODUCTION VIEW MAP
 Calls 0 E-Com 0 Meetings 0 

- From the Upcoming Schedule view, click the **+ Add Activity** button .



12 Wednesday February, 2020 1:00 PM-2:00 PM
 Meet with Dave Ellison
 (843) 284-7149 | daveell@gmail.com |  Edit Activity 

The Add Activity window appears. Here you will enter the details regarding the activity you've completed for this prospect.

- **Prospect Rating** - The rating reflects the timeframe in which you believe the prospect may affiliate with your company. To update your prospects rating, click the Rating.
- Click the **new rating**.

Add Activity

5 Dave Ellison

30 days or less
 31 to 60 days
 61 to 90 days
 91 to 180 days
 Prospect
 Not Affiliating

N - New Phone (843) 555-1212
 Outcome Email daveell@gmail.com

Next Activity Information

Next Activity

Cancel Save to Calendar Save & Close

Continue to add the details regarding your completed activity, be sure to add the following:

- Date** – Click here to select the date the activity was **completed**. Please note that you cannot select a future date.
- Prospect Status** – based on the activity you just completed what is the status of your prospect. It will remain N until you change it. Click the drop down arrow and choose:
 - N – New
 - I – Interviewed
 - F – Follow-up

Add Activity

5 Dave Ellison

02/06/2020 **a** N - New **b** Phone (843) 555-1212
 Activity Type Outcome Email daveell@gmail.com

Activity Notes

Next Activity Information

Next Activity

Cancel Save to Calendar Save & Close

c. **Activity Type** – Select the activity you completed.

- **N** – None
- **P** – Phone
- **M** – Meeting Held
- **E** – Email
- **T** - Text

d. **Outcome** – What was the outcome of your activity? Did it result in an appointment or is additional follow-up needed?

- **SA** – Scheduled Appt
- **FA** – Held First Appt
- **A** – Held Appointment
- **P** – Potential Sign-on
- **S** – Signed on
- **W** – Will follow-up
- **X** – Do not contact

e. **Activity Notes** – any notes pertaining to the activity that you want to remember.

Add Activity

5 Dave Ellison

02/06/2020 N - New Phone (843) 555-1212

Activity Type **c** Outcome **d** Email daveell@gmail.com

Activity Notes **e**

Next Activity Information

Next Activity

Cancel Save to Calendar Save & Close

Every recruiting activity should be followed by another activity. In the **Next Activity Information** section, enter the details about your next step with this prospect.

- f. Next Activity**– Select your next activity.
- **N** – None
 - **P** – Phone
 - **M** – Meet
 - **E** – E-Com (this includes text or post to social media)

Add Activity

5 Dave Ellison

02/06/2020 N - New Phone (843) 555-1212

P - Phone SA - Scheduled A... Email daveell@gmail.com

Had a nice opening conversation with Dave. He agreed he'd like to talk more in person, so we agreed to meet for lunch next week.

Next Activity Information

Next Activity

Next Activity

N - None

P - Phone

M - Meet

E - E-Com

Cancel Save to Calendar Save & Close

- g. Next Activity Date** - Enter the date your next activity will occur.
- h. Time** – Enter the time your next activity will occur.
- i. Duration** – Select how long should this activity is scheduled for.

Add Activity

5 Dave Ellison

02/06/2020 N - New Phone (843) 555-1212

P - Phone SA - Scheduled A... Email daveell@gmail.com

Had a nice opening conversation with Dave. He agreed he'd like to talk more in person, so we agreed to meet for lunch next week.

Next Activity Information

M - Meet

Next Activity Date 9 00 AM 30 Min

Cancel Save to Calendar Save & Close

Finally, you will need to save this activity. You can choose one of the following:

- j. **Cancel** – this will cancel your activity and won't save.
- k. **Save to Calendar** – this will save your activity and will send you an email with calendar invite so that you can add this to your online calendar (such as Outlook or gmail).
- l. **Save and Close** – this will save your activity and bring you back to the dashboard.

A confirmation will display once you have made your selection.

The screenshot shows a form titled "Next Activity Information". At the top is a dropdown menu with "M - Meet" selected. Below this is a "Next Activity Date" field, followed by four time selection dropdowns: "9", "00", "AM", and "30 Min". At the bottom of the form are three buttons: "Cancel", "Save to Calendar", and "Save & Close". Red callout bubbles with letters 'j', 'k', and 'l' point to the "Cancel", "Save to Calendar", and "Save & Close" buttons respectively.