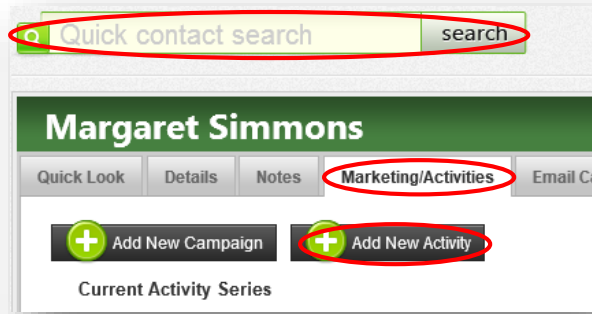


surefire

Scheduling Activities



Type your contact's name into the **Quick Contact Search** bar. From the contact record, click the **Marketing/Activities** tab, then **Add New Activity**.

A screenshot of the 'Add Activity' form in the Surefire interface. The form is titled 'Add Activity' and is located under the 'Marketing/Activities' tab. It contains several fields: 'Activity Name' (with 'Realtor Presentation' entered), 'Activity Type' (with 'Meeting' selected in a dropdown), 'Date' (with '04/18/2014' entered), a checkbox for 'This Is An All Day Activity', a time range selector (set to '12:00 PM' to '01:00 PM'), and a 'Color Code' dropdown (set to 'Red'). There is also a 'Details' section on the right with the text 'Review co-branded flyers, in-p'. At the bottom right, there are 'Add Activity' and 'Cancel' buttons, with 'Add Activity' circled in red.

Enter values for **Activity Name**, **Activity Type**, **Date**, and **Time**.

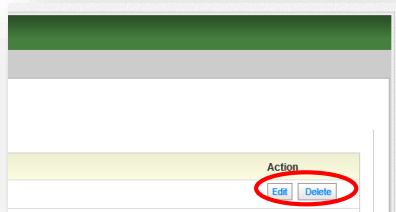
Choose a **Color Code**. The color will show on your calendar and on your daily email reminder.

Fill in **Details** of the activity, then click **Add Activity**.

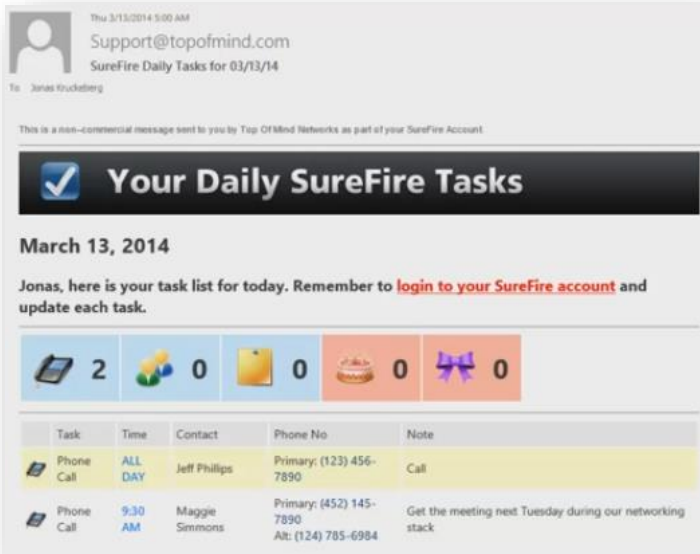
A screenshot of the Surefire interface showing the 'Marketing/Activities' tab. It displays a table with one activity listed. The table has columns for 'Type', 'Activity', and 'Date'. The activity is 'Meeting » Realtor Presentation' on 'Apr 18, 2014 (12:00 PM - 12:30 PM)'. Above the table are two buttons: '+ Add New Campaign' and '+ Add New Activity'. The table is titled '1 Activities'.

Type	Activity	Date
	Meeting » Realtor Presentation	Apr 18, 2014 (12:00 PM - 12:30 PM)

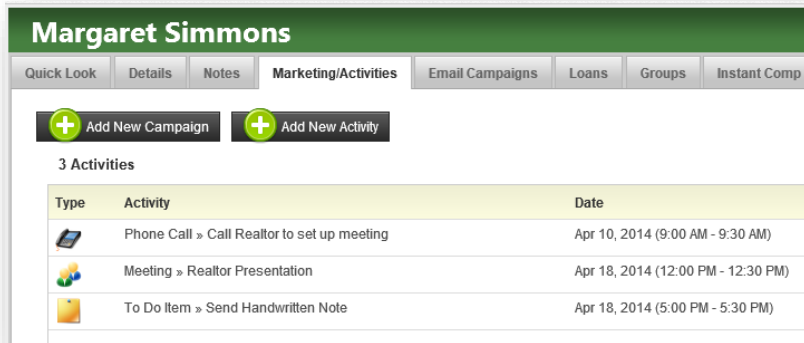
The activity will appear in the contact's **Marketing/Activities** tab.



If you need to change or delete the activity, go to the right side of the same screen and click **Edit** or **Delete**.



You will receive reminders of calendar items in a **Your Daily Surefire Tasks** email from support@topofmind.com.



BEST PRACTICE: Schedule a call to invite a prospective Realtor partner to a meeting. Schedule the meeting (edit as needed after the call), and schedule a reminder to send a handwritten note immediately after the meeting.

It's that simple!

