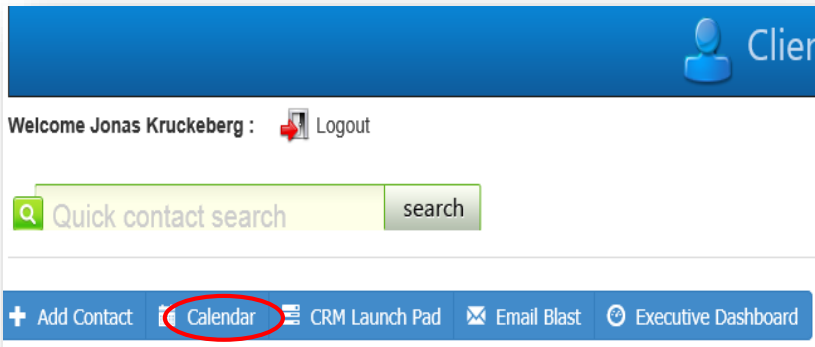


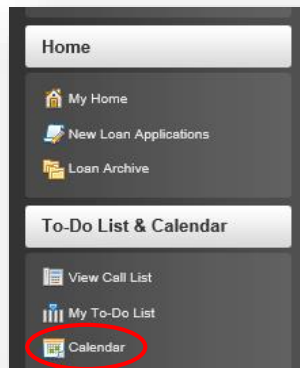


Using the Surefire Calendar

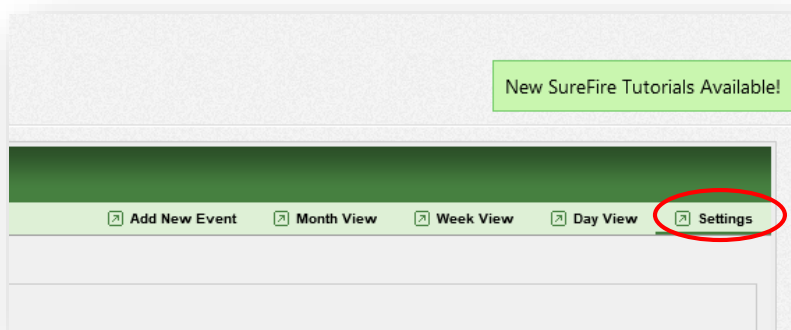
Step One: Set Up Your Calendar



Access the **Calendar** from the top of your home screen...



...or the right sidebar menu.



Click on **Settings** in the top right corner.

Jonas Kruckeberg's Calendar

Calendar Settings

Default View
Month

Default Appointment Time
00:30 hr

Default Day View Time Span
08:00 AM to 05:00 PM

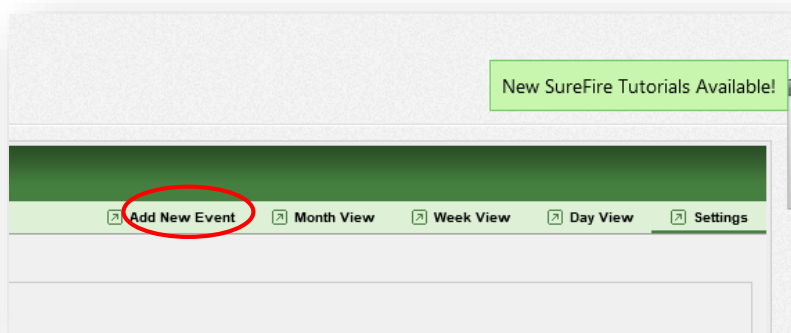
Default Day View
Hourly

Display Events on Calendar
 Customer Birthdays
 Customer Loan Anniversaries

Save

Choose your preferred settings for **Calendar View, Appointment Time, Day View Time Span and Day View. Customer Birthdays and Customer Loan Anniversaries** are selected by default. Click **Save**.

Step Two: Add An Event



To schedule something on your calendar, click **Add New Event** near the top right of the screen.

Steve Freeman's Calendar

Add Activity

Activity Name
Coffee

Activity Type
Meeting

Associate with a Contact?
Beck, Steven

Event Date
03/28/2014

This is An All Day Activity

09:00 AM to 10:00 AM

Color Code
Lt Blue

This is a Repeating Activity

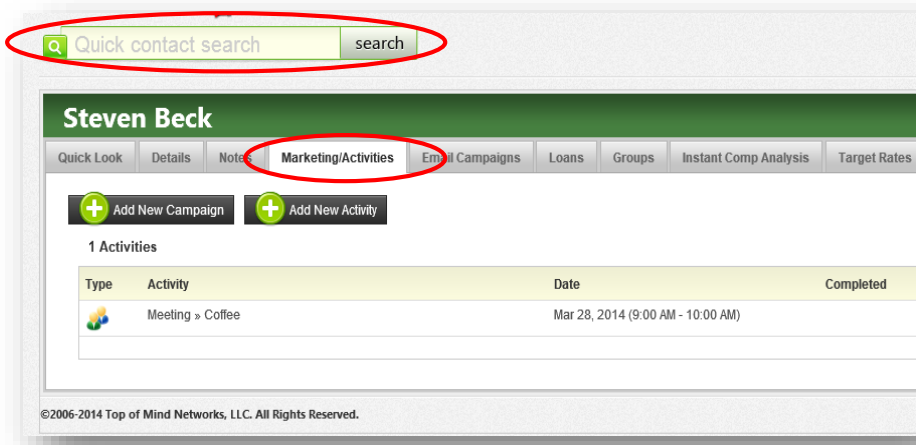
Details:
Review Purchase Prospect Drip Campaign

Add Event Cancel

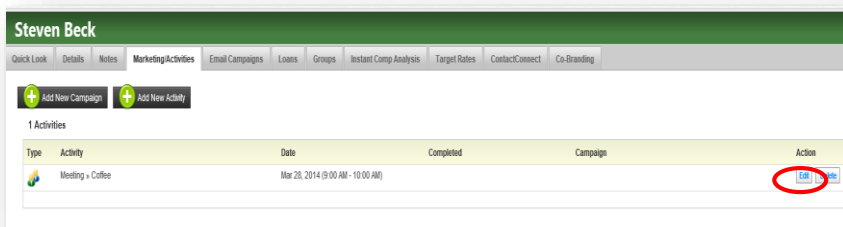
Complete the boxes for **Activity Name** and **Activity Type**.

Associate with a Contact by choosing a contact from the drop down menu. This way, the event will also appear in the contact's Marketing Activities list.

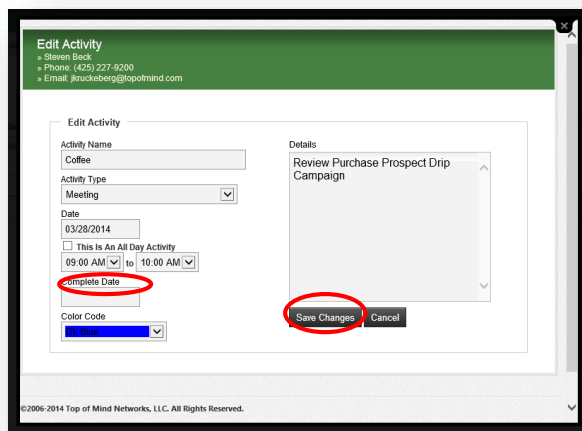
Complete the remaining information, add any details, and click **Add Event**.



To see the entry in your contact's record, type the name in the **Quick Contact Search** box, then click on the **Marketing/Activities** tab.



BEST PRACTICE: After the event, search the contact's name and view the **Marketing/Activities** tab. Click **Edit** next to the event entry.




Type in the **Complete Date**, then **Save Changes**.

Steven Beck

Quick Look Details Notes Marketing/Activities Email Campaigns Loans Groups Instant Comp Analysis Target Rates C

+ Add New Campaign + Add New Activity

1 Activities

Type	Activity	Date	Completed
	Meeting » Coffee	Mar 28, 2014 (9:00 AM - 9:30 AM)	Mar 28, 2014

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The **Completed** date will appear in the entry.

It's that simple!

