

Creating an Activity

Step 1: Create a new Meeting

Meeting for new loan opportunity - Meeting

FILE MEETING INSERT FORMAT TEXT REVIEW

Delete Appointment Scheduling Assistant CRM Fields Skype Meeting Cancel Invitation Options Tags Track Regarding

Actions Show Skype Meeting Attendees CRM

You haven't sent this meeting invitation yet.

To... Bills, Matthew

Subject Meeting for new loan opportunity

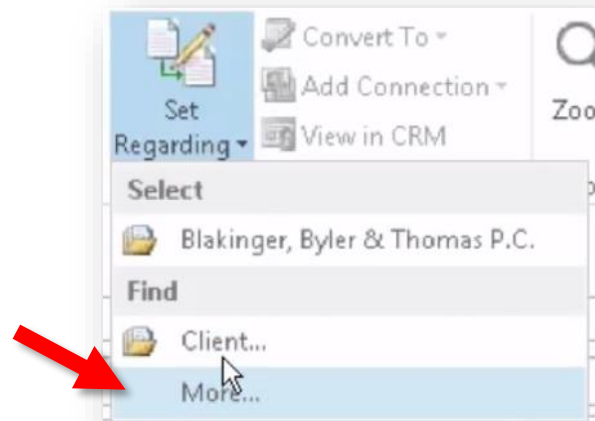
Location Panera Bread

Start time Fri 10/21/2016 1:00 PM All day event

End time Fri 10/21/2016 2:00 PM

Hi Matt – I am looking forward to understanding your loan needs further. See you Friday!

Step 2: Click "Set Regarding" and "More..."



Step 3: Click “Show Only My Records”

Look Up Record

Enter your search criteria and click Search to find matching records. Filter your results and view different columns of data by using the View options. Then, select the record you want and click OK.

Look for: Client ☐ Show Only My Records

View: Client Lookup View

Search: Search for records

Client	City	Branch Nu...
<input checked="" type="checkbox"/> ABC Company	Easton	
<input type="checkbox"/> Abramoff, Neuberger, LLP	Baltimore	
<input type="checkbox"/> Alan F. Kirk, Esq.	State College	
<input type="checkbox"/> Albertson Law Office	West Deptford	
<input type="checkbox"/> Allen Weiss, Esq.	Jackson	
<input type="checkbox"/> Amato & Associates, PC	Bethlehem	
<input type="checkbox"/> Anthony J. Sposaro, Esq.	Chester	
<input type="checkbox"/> Archer & Greiner, PC	Haddonfield	
<input type="checkbox"/> Arthur Gusoff, Attorney At Law	Denville	
<input type="checkbox"/> Babst, Cailand, Clements Zomnir PC	State College	
<input type="checkbox"/> Ballard, Conner, Anderson, & Townsend, LLP	Philadelphia	

1 - 35 of 35 (1 selected)

Properties New

OK Cancel Remove Value

Step 4: Find Client

Step 5: Press “OK”

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Location: Panera Bread

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Hi Matt – I am looking forward to understanding your loan needs further. See you Friday

Microsoft Dynamics CRM

Regarding: Blakinger, Byler & Thomas P.C.

This meeting will be tracked in CRM after it is saved or sent.

Step 6: Verify “Regarding”

Step 7: Send