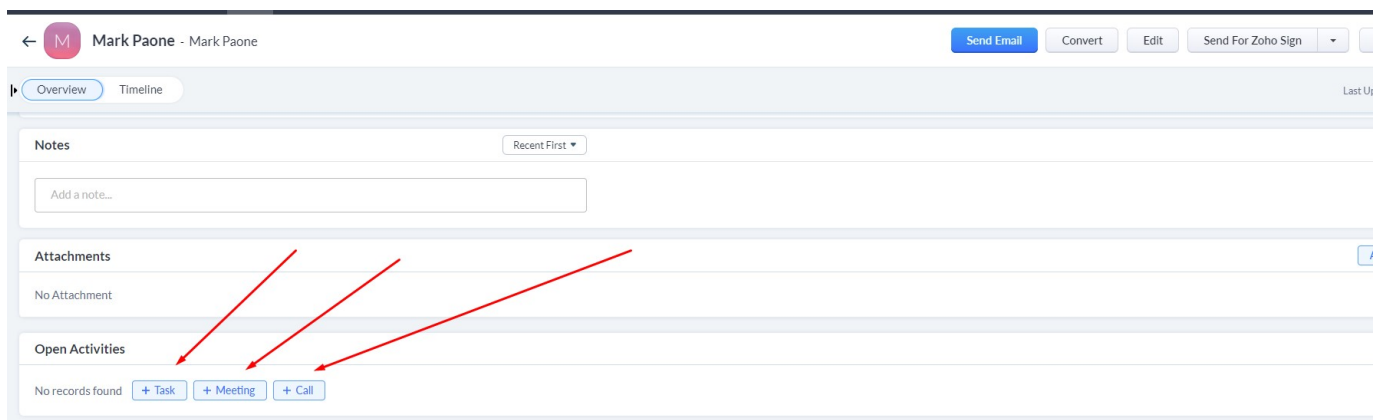




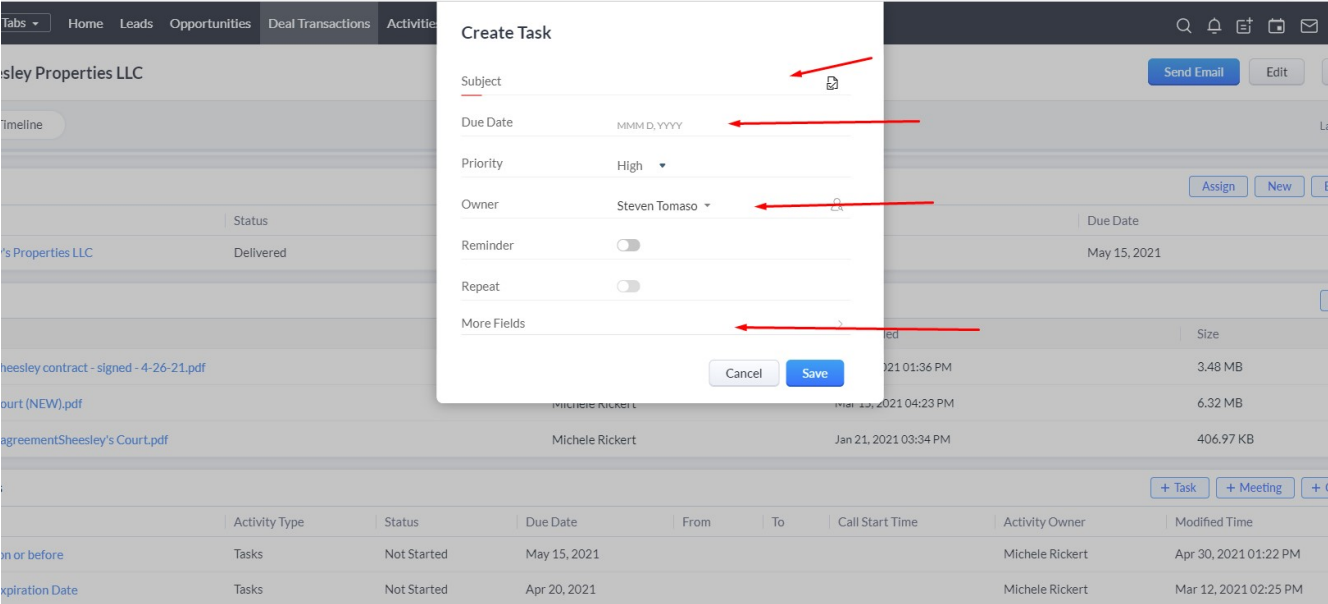
Activities - ZOHO CRM

Activities are tasks, meetings or calls that are needed to be done by IRE Investment to facilitate business. There's a few ways to create a task. There is also the ability to assign a task to a team member.

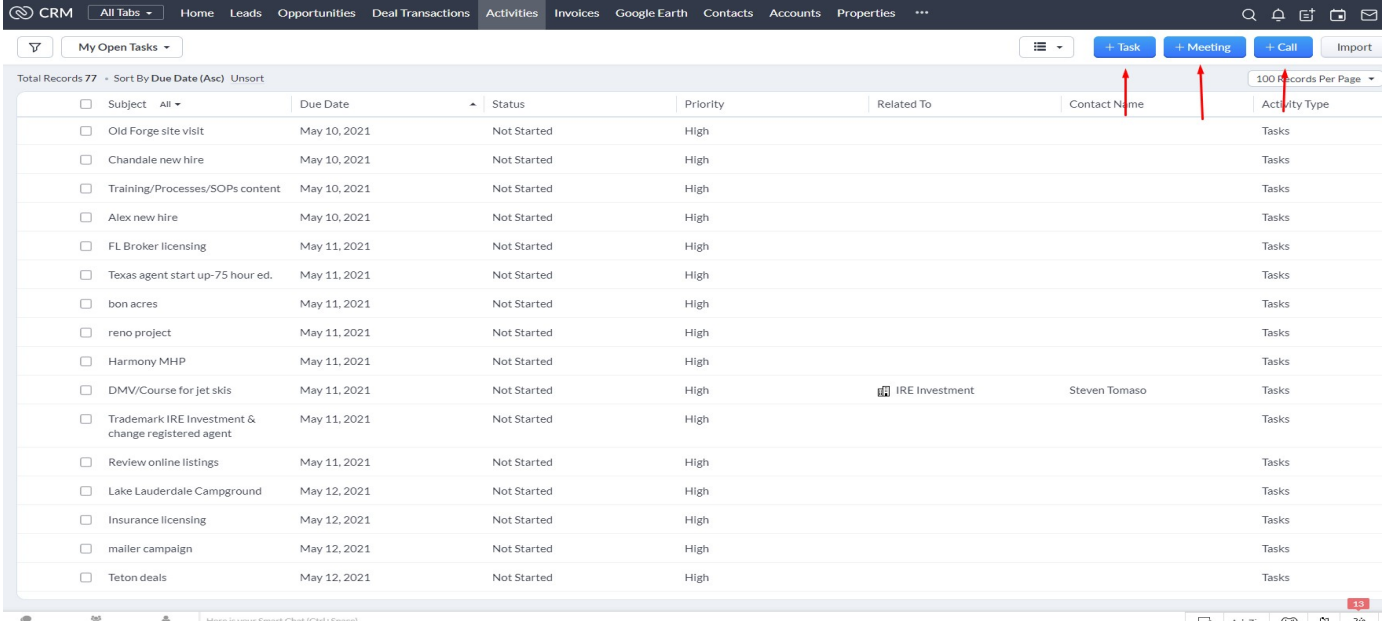
First, let's talk about creating a task in the leads, opportunities and deal transaction modules. While brokers work leads, opportunities and deal transactions they will find themselves with a number of calls, meetings, assignments and tasks they need to complete. Once a large deal flow occurs for brokers this becomes a challenging task. Utilizing the activities functionality in the CRM not only allows you to work more efficiently, but it will help you maintain sanity. Below I've put an illustration on where the activities is in the leads module (it has a similar placement in all three of these modules):



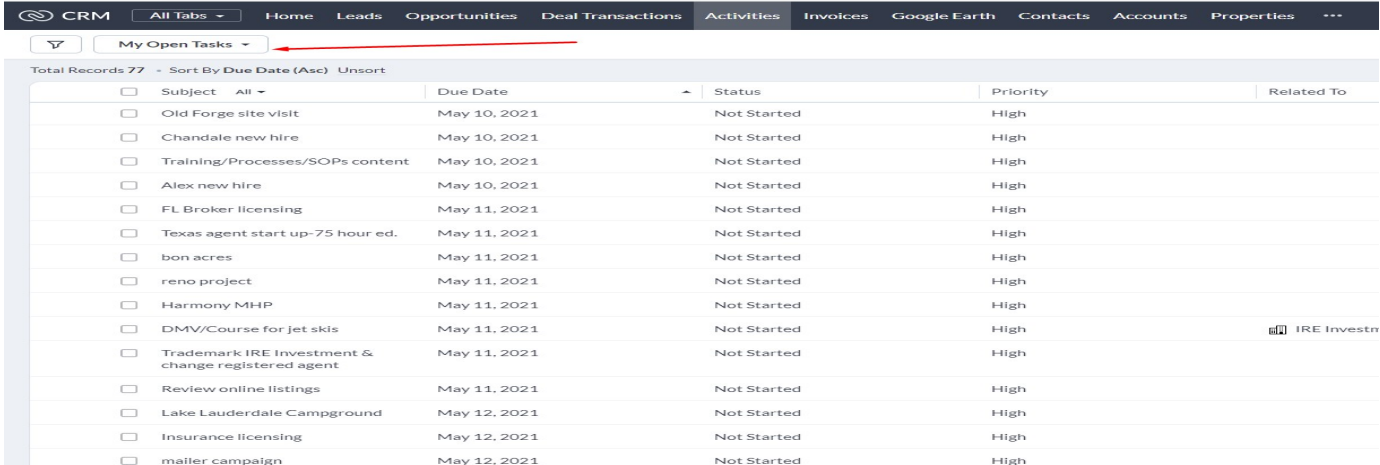
To create a task, meeting or call activity in the leads, opportunities or deal transaction modules it is all a fairly similar process. You basically click what ever button is most appropriate and complete the form.



You may also have an activity that is not related to any lead, opportunity or deal transaction. You can create them directly in the activities module as illustrated below:



Managing your tasks is critical to success and staying organized with them will be half your battle. You can easily view your tasks by applying the my open task filter to keep a close eye on them.



The screenshot shows a CRM interface with a navigation bar at the top containing 'CRM', 'All Tabs', 'Home', 'Leads', 'Opportunities', 'Deal Transactions', 'Activities', 'Invoices', 'Google Earth', 'Contacts', 'Accounts', and 'Properties'. Below the navigation bar, a filter dropdown is set to 'My Open Tasks', indicated by a red arrow. The main content area displays a table of tasks with the following columns: Subject, Due Date, Status, Priority, and Related To. The table contains 17 rows of task entries, all with a status of 'Not Started' and a priority of 'High'. The tasks are sorted by due date in ascending order.

<input type="checkbox"/>	Subject	Due Date	Status	Priority	Related To
<input type="checkbox"/>	Old Forge site visit	May 10, 2021	Not Started	High	
<input type="checkbox"/>	Chandale new hire	May 10, 2021	Not Started	High	
<input type="checkbox"/>	Training/Processes/SOPs content	May 10, 2021	Not Started	High	
<input type="checkbox"/>	Alex new hire	May 10, 2021	Not Started	High	
<input type="checkbox"/>	FL Broker licensing	May 11, 2021	Not Started	High	
<input type="checkbox"/>	Texas agent start up-75 hour ed.	May 11, 2021	Not Started	High	
<input type="checkbox"/>	bon acres	May 11, 2021	Not Started	High	
<input type="checkbox"/>	reno project	May 11, 2021	Not Started	High	
<input type="checkbox"/>	Harmony MHP	May 11, 2021	Not Started	High	
<input type="checkbox"/>	DMV/Course for jet skis	May 11, 2021	Not Started	High	IRE Investr
<input type="checkbox"/>	Trademark IRE Investment & change registered agent	May 11, 2021	Not Started	High	
<input type="checkbox"/>	Review online listings	May 11, 2021	Not Started	High	
<input type="checkbox"/>	Lake Lauderdale Campground	May 12, 2021	Not Started	High	
<input type="checkbox"/>	Insurance licensing	May 12, 2021	Not Started	High	
<input type="checkbox"/>	mailer campaign	May 12, 2021	Not Started	High	