









email

password

**Submit** 





 Home
 Brokers
 Tasks
 Alerts
 Messages
 Settings
 Help



Welcome, Sally

My Settings

## There are no critical alerts

You have 4 Alerts

My Tasks

Task One

Task Two

Q search	) My History	1	New In Transition
Name	Туре	Touches	Date
John Smith	New Broker	1	1/4/2017
Jason Jackson	Broker In Transition	7	1/2/2017
			▼
All Brokers	All Messages	II Tasks	All Alerts



**@** 

Home Brokers Tasks Alerts Messages Settings



# Welcome, Sally

You have 4 Alerts

# Private task 1 Private task 2 Private Task 3 All Tasks Messages Here is a sample message L Jenkins 12 hours ago Here is a second message L Jenkins 15 hours ago An older message L Jenkins 2 days ago

Useful things

All Brokers	Create a Task	Add a Broker	My Settings

Q search	My History	1	New In Transition
Name	Туре	Touches	Date
John Smith	New Broker	1	1/4/2017
Jason Jackson	Broker In Transition	7	1/2/2017
			▼







#### All Brokers

	, 2. 0		New	In Transi	tion
Name	Туре	Touches	E	dit/Delete	
John Smith	New Broker	1	Edit	<u>Delete</u>	
Sam Applegate	New Broker	5	Edit	<u>Delete</u>	
Jason Jackson	Broker In Transition	7	Edit	<u>Delete</u>	
Dillon Brooks	New Broker	9	<u>Edit</u>	Delete	
					▼











## Messages

Here is a sample message

LJenkins 12 hours ago

Here is a second message

LJenkins 15 hours ago

An older message

LJenkins 2 days ago

Here is a sample of what it might look like if there was a bit more text in the body.

LJenkins 4 days ago



4	A Web Page	
Home Brokers Tasks Ale	erts   Messages   Settings	<b>→</b> ) logout
	Settings	
First Name:		
Last Name:		
Email:		
☑ Receive Notific	cations	
Save Changes		



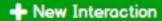


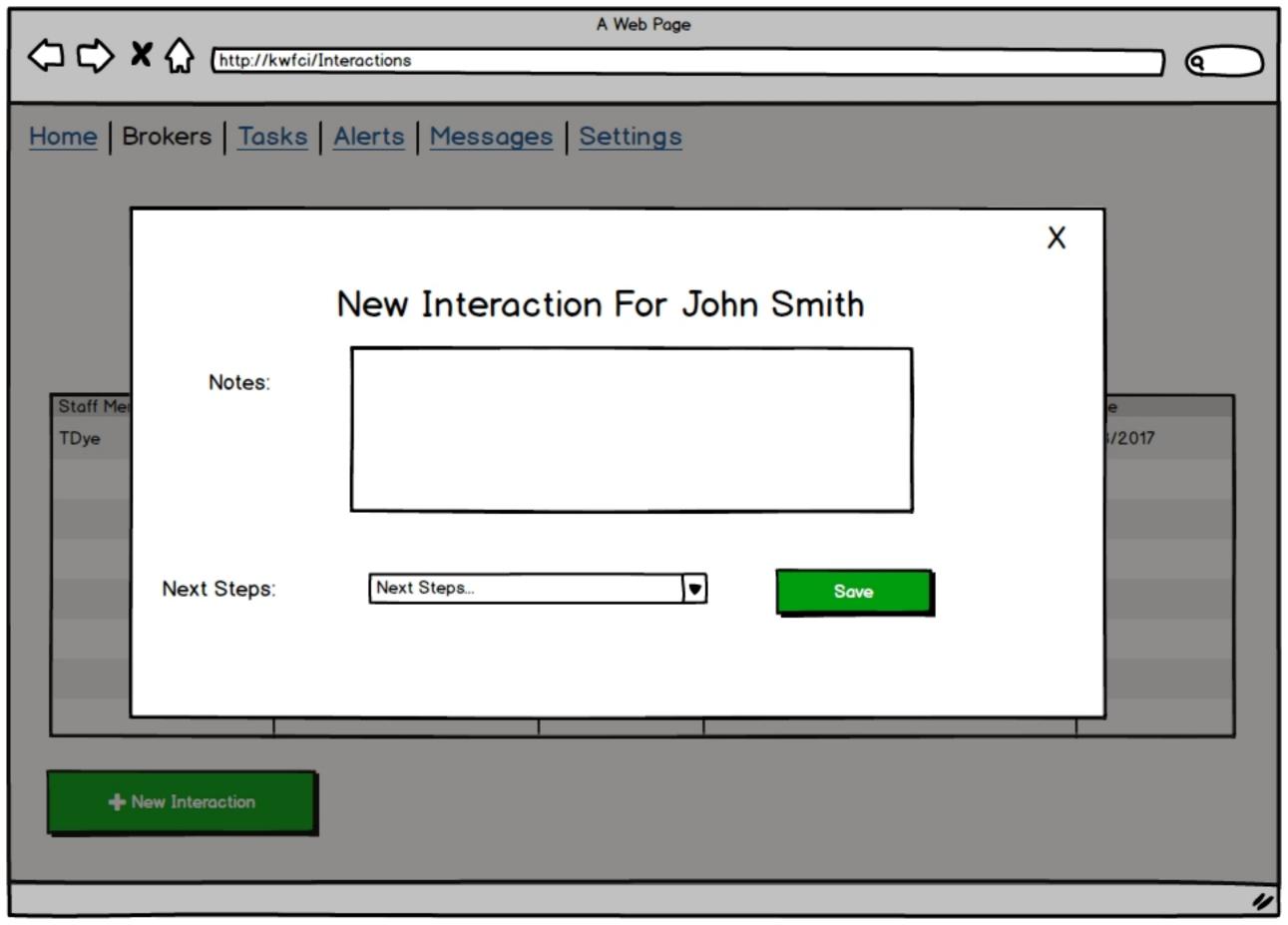


# Interactions for John Smith

1/10 Touches

Staff Member		Next Step		Date
TDye	Meet next week to discuss beard	Follow up about progress	+ Add Alert	4/3/2017















#### **Alerts**

Priority	Date Due	Message	Resolve	Edit
1	4/11/2017	Nancy key fob	Resolved	Edit
3	4/17/2017	Card for Jeremy	Resolved	Edit
3	12/20/2016	Holiday email	Resolved	Edit
1	4/12/2017	Roxanne Auto-Pay Issue	Resolved	Edit
2	4/14/2017	Alice's Birthday Cake	Resolved	<u>Edit</u> ▼

Resolve All Alerts

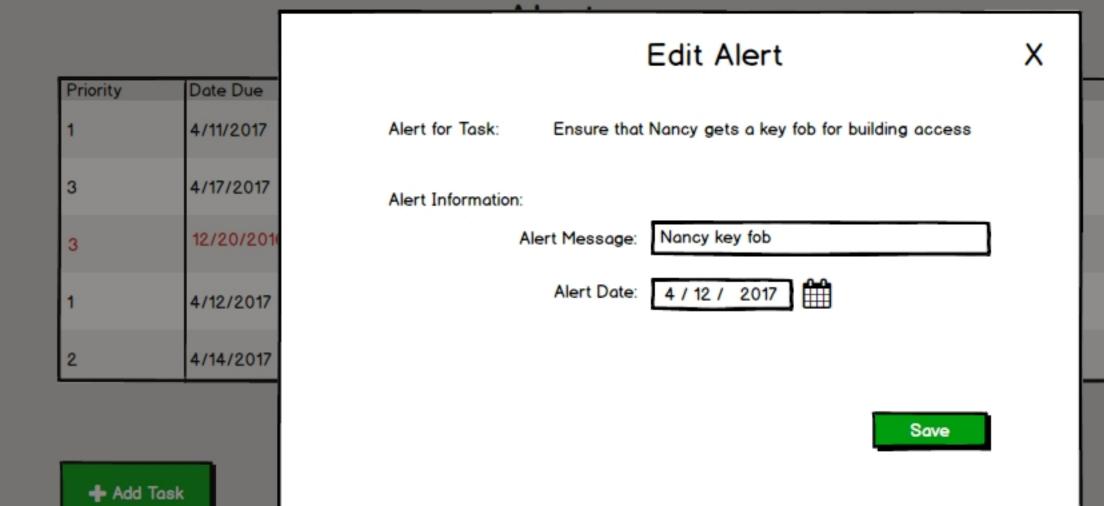


















## Tasks

Date Created	Description	Alert
4/5/2017	Send a card to Robert congratulating him on sale	4/7/2017
4/5/2017	Ensure that Mary gets a key fob for building access	
4/6/2017	Verify that Joe completed paperwork	
4/6/2017	Send email informing staff of holiday changes	4/25/2017
4/10/2017	Check on Carl's paperwork status	4/12/2017
4/11/2017	Meet with Pleasant Co. realty representative	4/20/2017



