

Updated 08312022

AgencyBloc – How to add an Activity Pull up Individual

1. Choose 'Activities' Tab
2. Click Create New

Michael Lealos (no group or carrier)

Individual Detail Policies Opps **Activities** Notes/Attachments Relationships Workflows Emails

Associated Activities Create New

3. Add Subject
4. Add any notes or attachment if needed to help you remember what you need to do
5. Click on Due Date and Choose Due Date (and Time if wanted). If you don't put a Due date it will not be added to the Agencybloc calendar.
6. Click Save and Append.

Individual Detail Policies Opps **Activities** Notes/Attachments Relationships Workflows Emails

Activity Details

Subject * **1**
Follow up with Client

Notes

Status: Not Started Follow-up User: Renee Minus Follow-up Team: (None) **2**
Due Date * **11/24/2021** Time Due * **9:30am to 10:00am**

Additional Activity Details

Activity Date * **11/23/2021** Related To: Priority: Medium Type: Initial contact Method: Email

Attachment(s)

Filename	Size	Status
Drag files here.		

3 Save & Append Cancel

7. You will see the activity show up in the following places:
- (1) In the Activity Tab with a Red Dot indicating there is an open Activity

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Associated Activities

Search:

Subject & Note	Association	Due Date	Priority	Status	Follow-up User	Follc
<u>Follow up with Client</u> (4)	Lealos, Michael	9/14/2022	MEDIUM	Not Started ▾	Renee Minus	

- (2) In the Activities To Do Box
- (3) On the Agencybloc Calendar



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Associated Activities

Search:

Subject & Note	Association	Due Date	Priority	Status	Follow-up User	Follc
<u>Follow up with Client</u> (1)	Lealos, Michael	11/24/2021 9:30 AM - 10:00 AM	MEDIUM	Not Started ▾	Renee Minus	

8. You can go ahead and complete the Activity once it is done, by either the dropdown arrow in the status, or by clicking into the Subject, adding notes and completing

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Individual Detail Policies Opps **Activities** Notes/Attachments Relationships Workflows Emails

Associated Activities Create New

Search: Show 25 entries

Subject & Note	Association	Due Date	Priority	Status	Follow-up User	Follow-up Team	Last Updated
Follow up with Client (2) Outreached prospect. No contact. Emailed prospect. Will text. 11/23/2021. Outreached prospect. No contact. Left voicemail. Texted and...	Lealos, Michael	11/24/2021 9:30 AM - 10:00 AM	MEDIUM	Not Started	Renee Minus		Renee Minus 11/23/21

Showing 1 to 1 of 1 entries

Previous 1 Next

UPDATE STATUS

- Not Started
- In Progress
- Waiting
- Complete**
- Deferred

Instructions on connecting your Activities Calendar: <https://help.agencybloc.com/hc/en-us/articles/115003855112-Activities-Calendar-Feed>