Portal Prodigy™

Tickler Notes - Task, Action and Prospect Organizer

Chapter Excerpt from Software User & Administration Guide
January 2007 Update
www.portalprodigy.com

1.1 Introduction

PortalProdigy provides for the attachment of notes, event triggers and task assignments to records within many of the system's features. Special fields are provided within each note allowing for categorization by status, type, follow-up date, and delegation contacts so that they may become part of any assortment of planning, reminding, delegating and task organizing systems that can be quickly configured to each organization's private PortalProdigy installation based on their preference. This feature can function as a prospecting tool, task assigner, escalation system, relationship manager and more. An unlimited number of notes can be related to any contacts and searched and sorted on an assortment of data types.

Tickler Notes feature benefits include:

- Easily assign tasks to system users.
- Maintains history of administration, customer support, prospecting and contact activities with specific individuals.
- Create reminders and ToDo's.
- Search for note records by contact name, company name, action taken, follow-up actions, status, prospect type, memo content, date range, creator and task assignee.
- Create an unlimited number of notes for any contacts.

Some of the components of the Tickler Notes feature, discussed in detail in this chapter, are:

Search Page Fields
- First Name Field
- Last Name Field
- Company Name Field
- Contact City Field
- Contact State Field
- Contact Zip Code Field
- Prospecting Type Field
- Notes Field

Contact Date Range Fields
Contact Time Range Fields
Follow Up Date Range Fields
Follow Up Time Range Fields
Action Taken Field
Follow Up Action Field
Follow Up Completed Field
Follow Up Assigned To Field
Created Date Range Fields
Last Modified Date Range Fields
Created By Field
Last Modified By Field
Items Per Page Field
Tickler Noted Directory Link
The Search Button

This chapter presents a detailed examination of the Tickler Notes interface and its functionality. The Tickler Notes feature allows your organization to centrally manage prospecting activities.

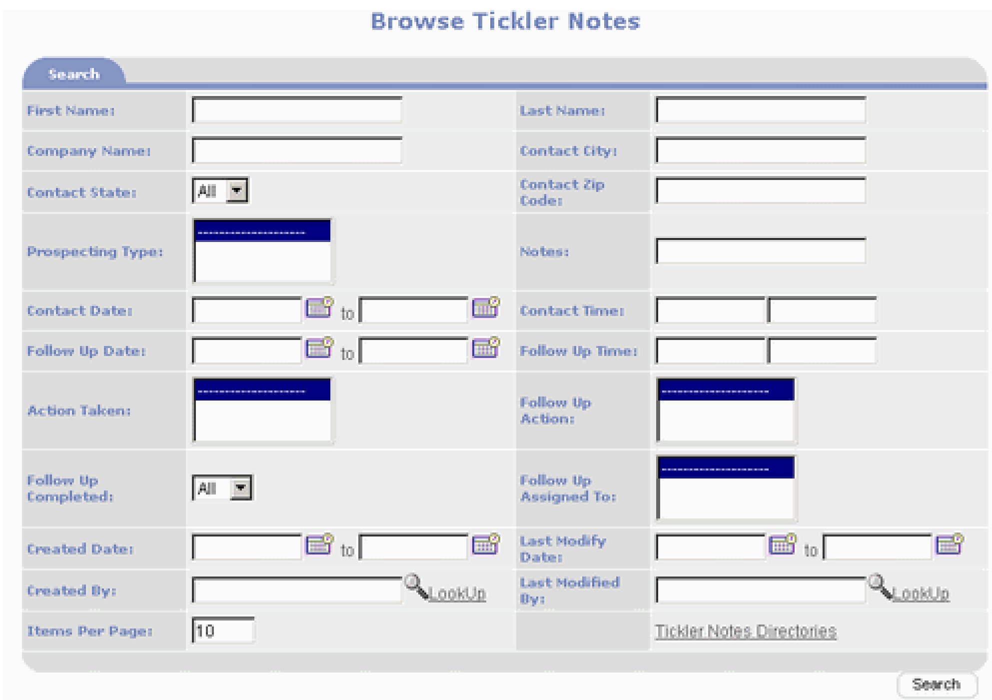
1.2 The Visitor Experience

Public visitors do not have access to the Tickler/Notes Feature. It is for the use of Administrative Visitors only.

1.3 Components

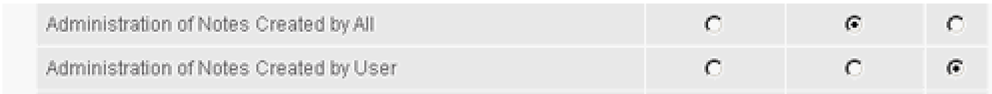
The Tickler Notes Feature includes the following components.

1.3.1 Tickler/Notes Search Page

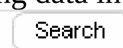


Note: It is suggested that a Security Group be set up for Employees and that all visitors requiring access to Tickler/Notes be assigned that Security Group. The Notes settings for the Employee Security Group should be set as follows:

Administration of Notes Created by All = `Read Only`
Administration of Notes Created by User = `Edit`



Administrative visitors can search for Tickler/Notes records based on any of the fields listed below. We suggest inputting values for certain selection fields before using the Tickler/Notes Feature. They are the Prospecting Type Field and Action Field. To input values for the Prospecting Type Field and Action Field select Features from the Administration Menu and click on the Notes link**.** At the bottom of the Notes Feature Directory Setup page are two links; Available Actions and Prospecting Types. Click on the desired link to add types.

A permitted Administrative visitor can search for Tickler/Notes by entering data into one or more of the fields listed below and then clicking on the Search button. 

- **First Name Field -** Filters for Tickler/Note Records related to Contact Records whose first name matches the input criteria.

- **Last Name Field -** Filters for Tickler/Note Records related to Contact Records whose last name matches the input criteria.

- **Company Name Field -** Filters for Tickler/Note Records related to Contact Records whose company matches the input criteria.

- **Contact City Field -** Filters for Tickler/Note Records related to Contact Records whose City matches the input criteria.

- **Contact State Field -** Filters for Tickler/Note Records related to Contact Records whose State matches the input criteria.

- **Contact Zip Code Field -** Filters for Tickler/Note Records related to Contact Records whose Zip Code matches the input criteria.

- **Prospecting Type Field -** The Prospecting Type Field filters for Tickler/Note Records with prospecting types that matches the input criteria. The selection values for Prospecting Type Field should be created by Administration prior to use of this feature. To input values for the Prospecting Type Field select Features from the Administration Menu and click on the Notes link**.** At the bottom of the Notes Feature Directory Setup page are two links; Available Actions and Prospecting Types. Click on Prospecting Types link to add a Prospecting Types.

- **Notes Field -** The Notes Field is a text wrapping scrollable field. Searching on the Notes field should almost always involve the use of the "*" as a wildcard. For example. "`*interested in joining*`". Essentially the entire

Tickler/Notes feature is built to support this key field which contains the substance of the record.

Contact Actions versus Follow up Actions - Often, Tickler/Notes are created as a simple record of information related to a specific contact or item, sometimes it is a record of a completed task and other times it is a reminder. *Contact* Action data relates to a record of something that has happened. *Follow Up* Action data relates to a record that reminds or delegates. It is often relevant to enter data into both sets of fields to note that something was done today and that follow up to that event is required some time later.

- **Contact Date Range Fields -** By entering a date in the first Contact Date Range field and entering a later date in the second Contact Date Range field, one can search for Tickler/Notes with Contact Dates within the range. While the Created Date or Last Modified auto-filling fields could be used to maintain such data, the field is included for times when a note may be entered on a different from the action occurring but the accurate input of the actual action date is desired or required.

- **Contact Time Range Fields -** By entering a date in the first Contact Time Range field and entering a later date in the second Contact Time Range field, one can search for Tickler/Notes with Contact Times within the range. These fields should be used in conjunction with the Contact Date Range Fields

- **Follow Up Date Range Fields -** By entering a date in the first Follow Up Date Range field and entering a later date in the second Follow Up Date Range field, one can search for Tickler/Notes with Follow Up Dates within the range.

- **Follow Up Time Range Fields -** By entering a date in the first Follow Up Time Range field and entering a later date in the second Follow Up Time Range field, one can search for Tickler/Notes with Contact Times within the range. These fields should be used in conjunction with the Follow Up Date Range Fields

- **Action Taken Field -** The Action Taken Field filters for Tickler/Note Records with Action types that matches the input criteria that were input into the Action

Taken Field. The selection values for Action Type Field should be created by Administration prior to use of this feature. To input values for the Action Type Field select Features from the Administration Menu and click on the Notes link**.** At the bottom of the Notes Feature Directory Setup page are two links; Available Actions and Prospecting Types. Click on Action Types link to add a Action Types.

- **Follow Up Action Field -** The Follow Up Action Field filters for Tickler/Note Records with Action types that matches the input criteria that were input into the Follow Up Action Field. It uses the same Action Selection List as the Action Taken Field.

- **Follow Up Completed Field -** The Follow Up Completed Field can be set to *Yes* or *No*. This field filters for Tickler/Note Records that match the criteria input into the Follow Up Completed Field.

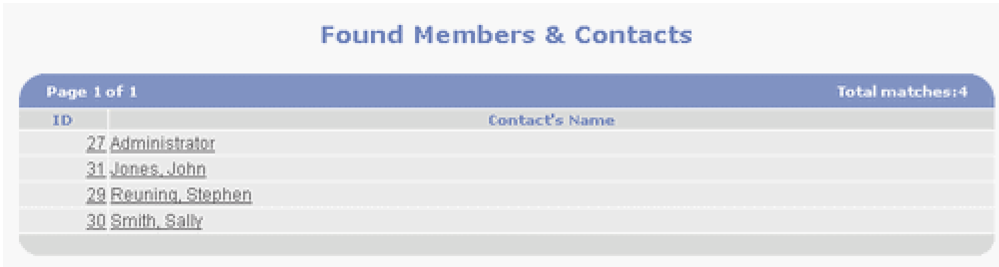
- **Follow Up Assigned To Field -** The Follow Up Assigned To Field filters for Tickler/Note Records that match the criteria input into the Follow Up Assigned To field. The selection list can only contain names from Contact Records where *Employee* Member Type is checked on the Contact Record. The Contact records of individuals expected to use this feature should by updated by Administration to have the Employee Member Type checked prior to the use of the Tickler/Notes feature.

- **Created Date Range Fields -** The Created Date Field is an autofill field. By entering a date in the first Created Date Range field and entering a later date in the second Created Date Range field, one can search for Tickler/Notes with Created Dates within the range.

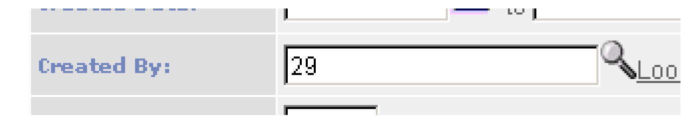
- **Last Modified Date Range Fields -** The Last Modified Date Field is an autofill field. By entering a date in the first Last Modified Date Range field and entering a later date in the second Last Modified Date Range field, one can search for Tickler/Notes with Last Modified Dates within the range.

- **Created By Field -** The Created By Field is an autofill field. A permitted Administrative visitor can use the look-up feature by clicking on the look-up icon 

. The visitor will be presented with the Contact Search page where he can search for a specific contact. Search results are displayed at the bottom of the page.

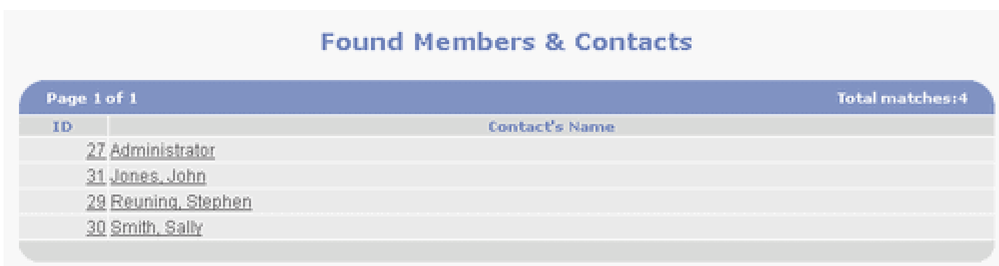


Click on the desired contact name, for example 29 Reuning, Stephen and the Contact ID is returned to the Created By Field.

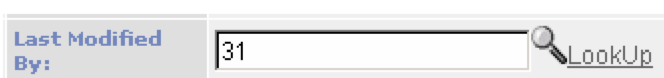


Thusly, one can search for all Tickler/Notes created by a specific visitor.

- **Last Modified By Field -** The Last Modified By Field is an autofill field. A permitted Administrative visitor can use the look-up feature by clicking on the look-up icon LookUp. The visitor will be presented with the Contact Search page where he can search for a specific contact. Search results are displayed at the bottom of the page.

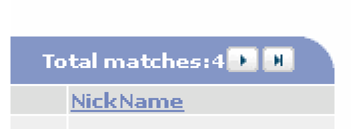


Click on the desired contact name, for example 31 Jones, John and the Contact ID is returned to the Last Modified By Field.



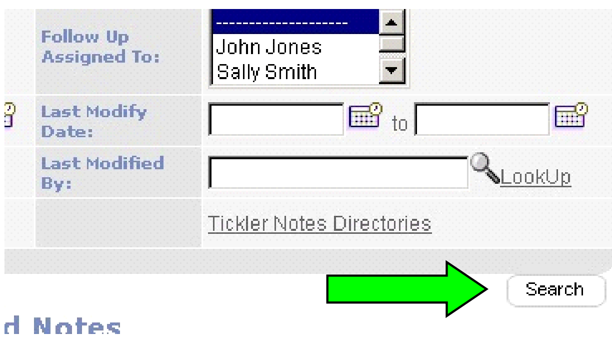
Thusly, one can search for all Tickler/Notes created by a specific visitor.

- **Items Per Page Field -** The Items Per Page Field defines the total number of rows of matches that will be displayed in the results window. If the total number of matches exceeds the total defined number of rows then the visitor will need to click the page forward button located at the top of the results window to see more of the matches.

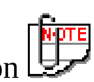


- **Tickler Noted Directory Link -** The Tickler Noted Directory Link accesses the Tickler Notes Directory Setup page.

- **The Search Button -** Clicking on the Search Button causes PORTALPRODIGY to search for Tickler/Notes filtered in accordance to the entries made into the Tickler Notes Search page. To search for all records, don't enter anything into any of the fields.

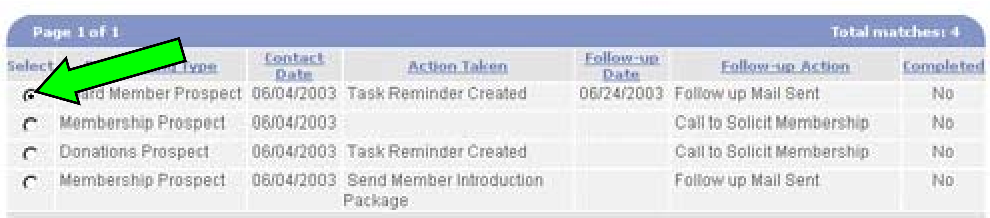


1.3.2 Tickler/Notes Entry and Update page

Tickler/Notes can be entered from any page where the Notes icon  is displayed (For example, on the Contact Management page) by clicking on the icon or by clicking on the Add New button 

on the Tickler/Notes Entry and Update page.

The fields located on the Tickler/Notes Entry and Update page are described in the section above titled “Tickler/Notes Search Page”. To update or view a specific note, click on its corresponding Radio Button and the data displayed on the page will update accordingly.



Tickler/Notes Entry and Update Page Buttons:

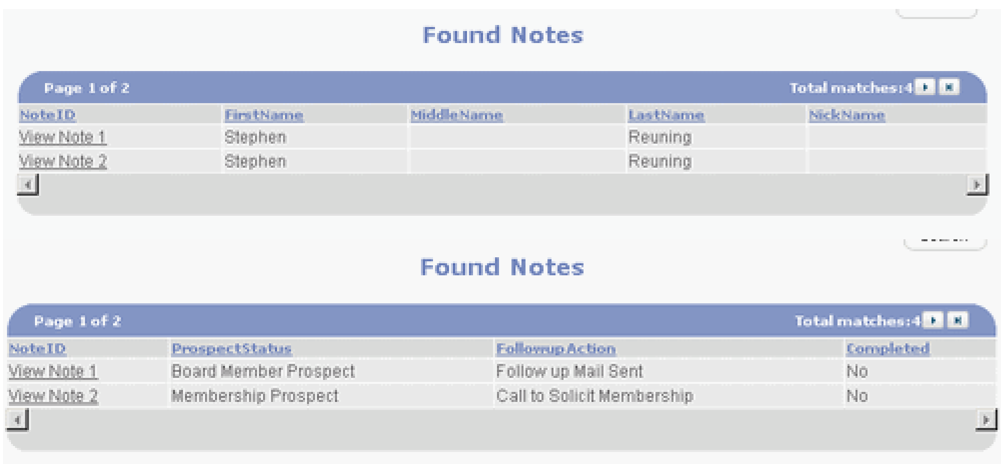
Add New	Clears the page of values and prepares it for a new entry.
Save	Saves the data entered into the Tickler/Notes Entry and Update Page fields.
Delete	Deletes the Tickler/Notes Record.
Print	Prints the website page to the user's local printer.
Cancel	Closes the page without saving or updating values.
Close	Closes the page and prompts to save the data.

1.4 Feature Administration

Describes the administration functions for the Tickler Notes Feature Component.

1.4.1 Tickler/Notes Directory Setup

Tickler/Notes results are displayed in the Found Notes Directory which is displayed at the bottom of the Tickler/Notes Search Page. Below are some example results windows. Note that the columns vary in the samples displayed below.


Found Notes

Page 1 of 2 Total matches:4

NoteID	FirstName	MiddleName	LastName	NickName
View Note 1	Stephen		Reuning	
View Note 2	Stephen		Reuning	

Found Notes

Page 1 of 2 Total matches:4

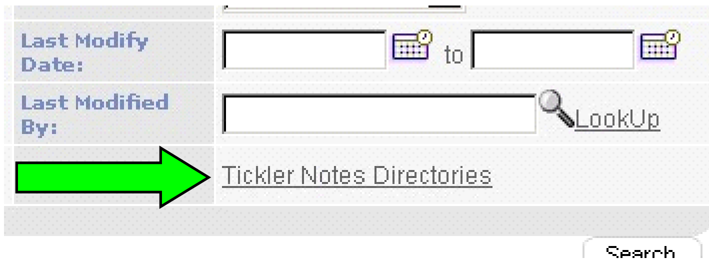
NoteID	ProspectStatus	FollowupAction	Completed
View Note 1	Board Member Prospect	Follow up Mail Sent	No
View Note 2	Membership Prospect	Call to Solicit Membership	No


Found Notes

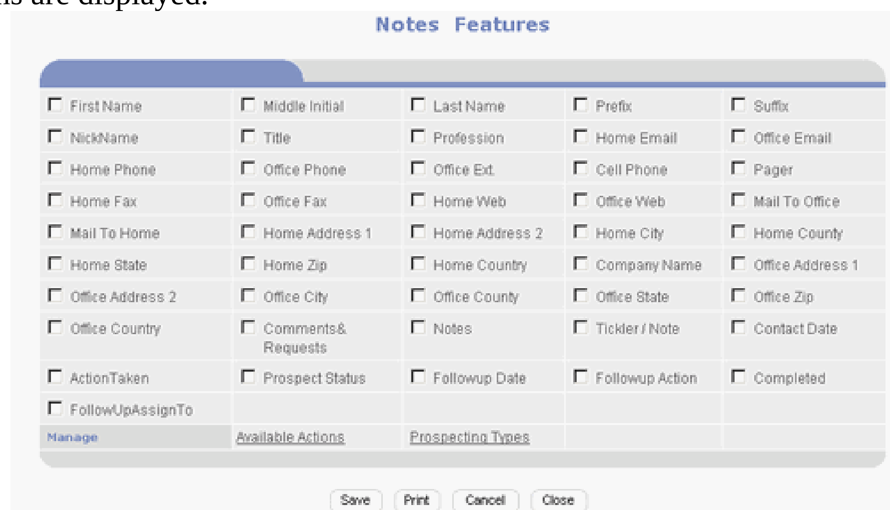
Page 1 of 2 Total matches:4

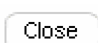
NoteID	FollowupDate	FollowupAction	FollowUpAssignTo
View Note 1	06/24/2003	Follow up Mail Sent	
View Note 2		Call to Solicit Membership	Sally Smith

Visitors may need to display result based on their particular needs and the Tickler/Notes Directory Setup provides the ability to display the desired fields in columns. To revise the results window click on the Tickler/Notes Directories link.



Clicking on the field check boxes in the Tickler Notes Directories page determines which columns are displayed.



Click the Close  button to save the results window format changes.

Clicking on a column label in the results window causes NNEM to sort the results by the values in that column.

1.5 Tutorials

1.5.1 How to Schedule Tasks and Tickler Items

1. Read the Chapter in Administration Manual titled “Tickler/Notes - Task, Action and Prospect Organizer”

2. Verify that Notes feature is activated

3. Tickler/Notes can be entered from any page where the Notes icon is displayed (For example, on the Contact Management page) by clicking on the icon or by clicking on the Add New button on the Tickler/Notes Entry and Update page.

4. Select a note to be updated from table or click on Add New button.

5. Enter description or action into note field to begin new note.

6. In Contact Tab section, indicate action taken and prospect type if applicable.

7. If follow up is required, in Follow Up tab section, enter follow up data i.e. follow up date and time, follow up assignee and follow up action.

8. If updating a note upon completion of follow up, select Completed field to “Yes”.

9. Click Save button to save note.

1.5.2 How to Create Task Types

- Go to Site Administration menu.

- Click Features go to icon.

- Click Tasks option.

- There are two task types, Task Types and Prospecting Types.

- Click on Task Types link and repeat the following steps for each new action you want to add:

- Click Contact Types located at the bottom of the Signup Features section of the User Signup page.

    - Click Add New Item link.

  - Enter the Type.
  - Click Save.

- Click Close to return to the Notes Features page.
- Click on Prospecting Types link and repeat the following steps for each new type you want to add:
  - Click Add New Item link.
  - Enter the Type.
  - Click Save.
- Click Close to return to the Notes Features page.
- You are finished.