Getting Started Tracking Customer Issues

1. Concept: Tasks vs Events
    a. Differences between tasks and events
    b. To-Do items and Calendar based items
2. Concept: Using Activity Filters
    a. Subset of Activities
    b. Ex. Just your renewal tasks
    c. Ex. All Claims Issues
    d. Ex. Tasks for all of a producer's clients
3. Concept: One Task – Many Ways to Access
    a. Tasks can be accessed multiple locations
    b. Workzone
    c. Company Record
    d. Contact Record
    e. Outlook Connector (to sync to, not full details)
    f. Office 365
4. Concept: Activity vs History
    a. Open work items (new, in progress)
    b. Pre-scheduled items
    c. Past Due Items
    d. Completed -> History
5. Concept: Delegating Tasks
    a. For those that re-assign to staff
    b. Want to track progress/stay informed
    c. Leader vs Owner
    d. Delegation Settings
    e. Filtering for Delegated Tasks
6. Setup: Customize Activity Categories
    a. Why customize (filter, stewardship reporting)
    b. How to Customize > Maintenance
7. Setup: Customize Activity Priorities
    a. Why Customize (filters, stewardship reporting)
    b. How to Customize > Maintenance
8. Setup: Creating an Activity Filter
    a. Manage > New Filter
    b. Basic Options
    c. Display Options
    d. Favorite(s)
    e. Deploy to Team
9. Training: Creating a Task: Client Record
    a. Show creating a new task from client record
    b. Show task on the activities tab and in workzone

10. Training: Creating a Task: Workzone
    a. Show creating a new task from the Workzone
    b. Search to tie to company/contact.
    c. Show both in workzone & on activity tab
11. Training: Creating a Task: Outlook Connector
    a. Create a new task using the outlook connector.
12. Training: Creating a Task: Office 365
    a. Create a new task in the Office 365 integration.
13. Training: Adding Notes
    a. Show adding more notes to existing tasks.
    b. See chronological history of what has transpired with the task.
14. Concept: Complete vs Complete w/Follow-Up
    a. Complete -> History
    b. Complete w/Follow Up -> History + Establish follow-up with details carried forward.
15. Concept: Bulk Activity Updating
    a. Using a filter to gather list of open work items.
    b. Prioritize your to-do list all at once.
    c. Cleanup in bulk with compete and delete options.
    d. Re-assign tasks when necessary in bulk – such as when going on vacation or if your duties change.
16. Concept: Specialty Task – Claims Issue
    a. Review claim tracking fields
    b. Show filter with some claim tracking fields displayed.
17. Concept: Specialty Task – Recurring
    a. Using advanced options to setup recurring tasks.
    b. How to set recurring cycle.
18. Concept: Stewardship Reporting
    a. What is a stewardship report
    b. How to generate
    c. What's included (sample)