

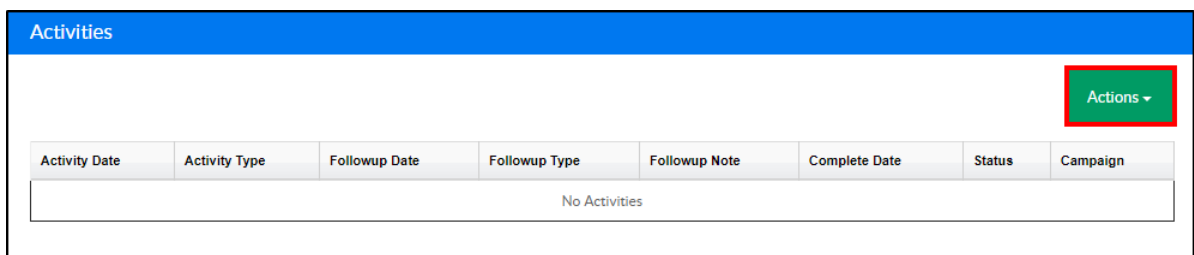
Family > Lead Management, Adding Activity/Calendar Events

Last Modified on 02/26/2019 10:34 am EST

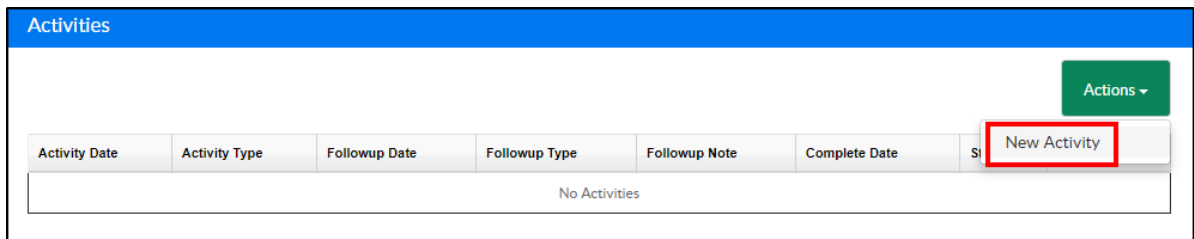
Adding an Activity

Once a family has been [added and saved on the Lead Management page](#), an Activity section will appear. Activities allow users to track interactions with families prior to a student being accepted into the center. To add a new activity, follow the steps below:

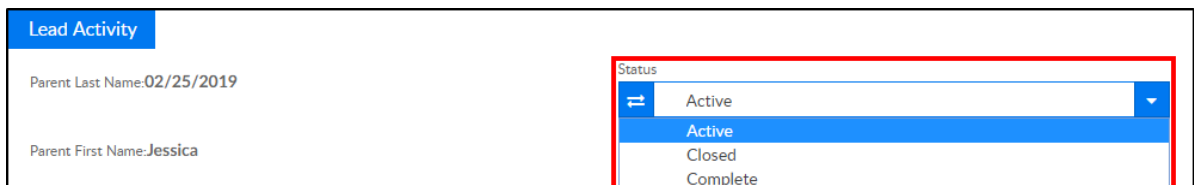
1. Click Actions under the Activities section



2. Select New Activity



3. Under the Lead Activity section, use the Status drop-down and select a status



- o Active - the activity is currently active
- o Closed - the activity is closed
- o Complete - the activity has been completed

4. Complete the Activity section

Activity

Activity Type

☰ Select Activity Type ▼

Activity Date

📅 02/25/2019

Campaign

☰ Select Campaign ▼

Activity Complete Date

📅

Description/Notes

📄

- Activity Type - select the type of activity (setup in [Valid Values](#) under Activity Type)
- Activity Date - select the date of the activity
- Campaign - select the campaign (setup in [Valid Values](#) under Campaign Type)
- Activity Complete Date - if there is a date the activity was completed, select from the calendar
- Description/Notes - enter a description of the activity or any necessary notes

5. Enter the Follow-up details

Followup

Followup Type

☰ Select Followup Type ▼

Followup Date

📅

Followup Notes

📄

- Follow-up Type - select the follow-up type (setup in [Valid Values](#) under Followup Type)
- Follow-up Date - select the date to follow-up with the guardian
- Follow-up Notes - enter any follow-up notes necessary

6. Click Save. All added activities will appear in the Activities section

Activities

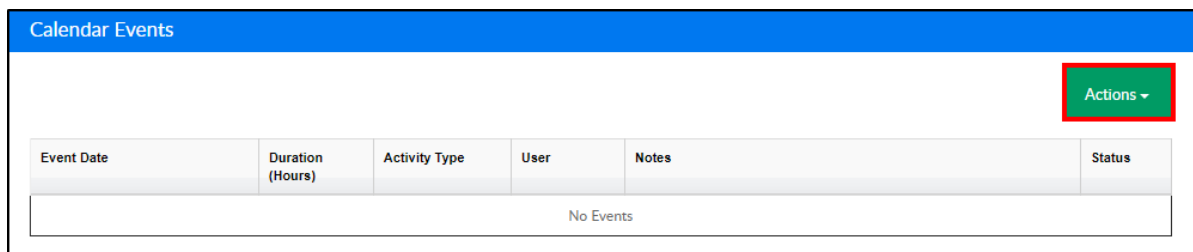
Actions ▼

Activity Date	Activity Type	Followup Date	Followup Type	Followup Note	Complete Date	Status	Campaign
<input checked="" type="checkbox"/> 02/13/2019	Phone Call					COMP	
<input checked="" type="checkbox"/> 02/21/2019	Tour	02/25/2019	Email		02/21/2019	CLSD	
<input checked="" type="checkbox"/> 02/25/2019	Phone Call					ACTV	

Adding a Calendar Event

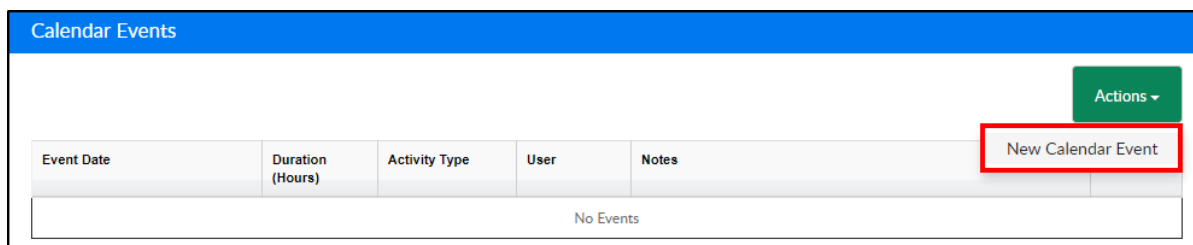
Calendar events, such as a phone call or tour, can be added to a lead. Follow the steps below to add a calendar event to a family:

1. Locate the Calendar Events section and click Actions



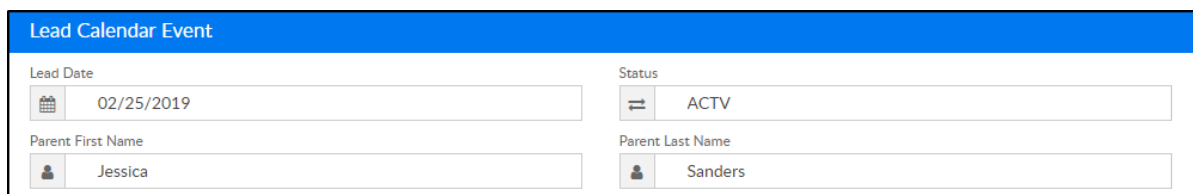
The screenshot shows the 'Calendar Events' section with a table containing columns for Event Date, Duration (Hours), Activity Type, User, Notes, and Status. The table is currently empty, displaying 'No Events'. A red box highlights the 'Actions' dropdown menu in the top right corner.

2. Select New Calendar Event



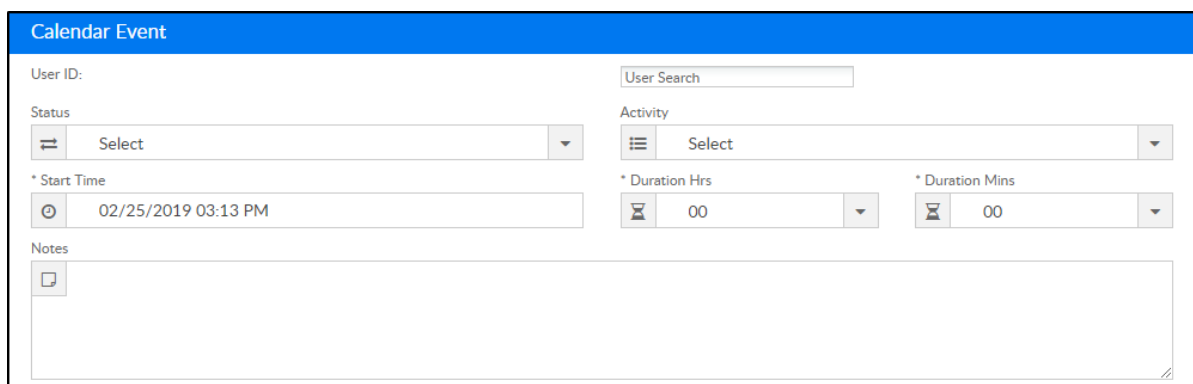
The screenshot shows the 'Calendar Events' section with the same table as above. A red box highlights the 'New Calendar Event' button, which is located in the top right corner next to the 'Actions' dropdown menu.

3. Ensure the information in the Lead Calendar Event section is correct. This information automatically populates based on what was entered when [creating the lead](#)



The screenshot shows the 'Lead Calendar Event' section with the following fields populated: Lead Date (02/25/2019), Status (ACTV), Parent First Name (Jessica), and Parent Last Name (Sanders).

4. Complete the Calendar Event section



The screenshot shows the 'Calendar Event' section with the following fields: User ID (User Search), Status (Select), Activity (Select), Start Time (02/25/2019 03:13 PM), Duration Hrs (00), and Duration Mins (00). There is also a Notes field with a text area.

- o User ID
- o User Search - search and select the name of the user assigned to

the calendar event

- Status - select if the status is Active or Completed (these options are setup in [Valid Values](#) under Lead Calendar Status)
- Activity - select the activity from the drop-down (setup options for this in Valid Values under Activity Type)
- Start Time - enter the start time of the event
- Duration Hrs/Mins - select how long the event will last in hours and minutes
- Notes - enter any notes regarding the calendar event

5. Click Save to complete the creation of the calendar event
