Efficience
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Tutorial

Create Activity Reports

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Create Activity Reports

This tutorial is useful to create new activity reports for a client, to add a new type of activity report in the software and to attach a PDF document to a report.

Efficience's philosophy is based on the fact that an activity report should always be created following a dialogue with a client, whether during a visit, by phone, email, etc. We will always go to the client in order to create an activity report related to the portfolio(s).

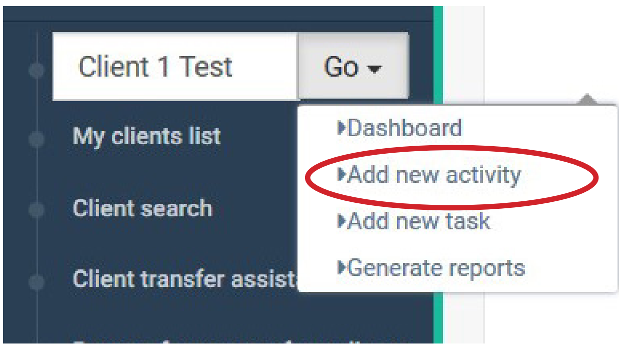
You can find your clients' activity reports in the linked portfolio dashboard, but you can only create them from the client and not from portfolio.

Activity Report Creation - Overview:

1. Go to the client dashboard.
2. Create an activity report.
3. Validate the activity report.

Activity Report Creation - Details:

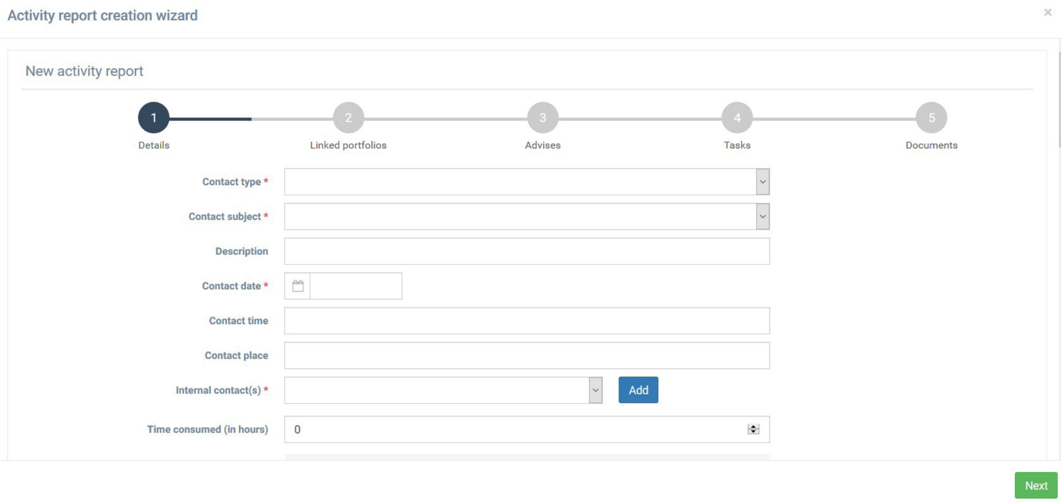
1. Click on "Client" in the main menu and search for the client's name.
2. Select "Add new activity" in the drop-down menu, which appears on the "Go" button.



Another way to reach this step is:
   a. Go to the client's dashboard.
   b. In the "Administration" menu of the client's dashboard, select "activity report".

3. Once you are in the activity report list, click on "New" at the top right of the list.

4. Fill in the required fields

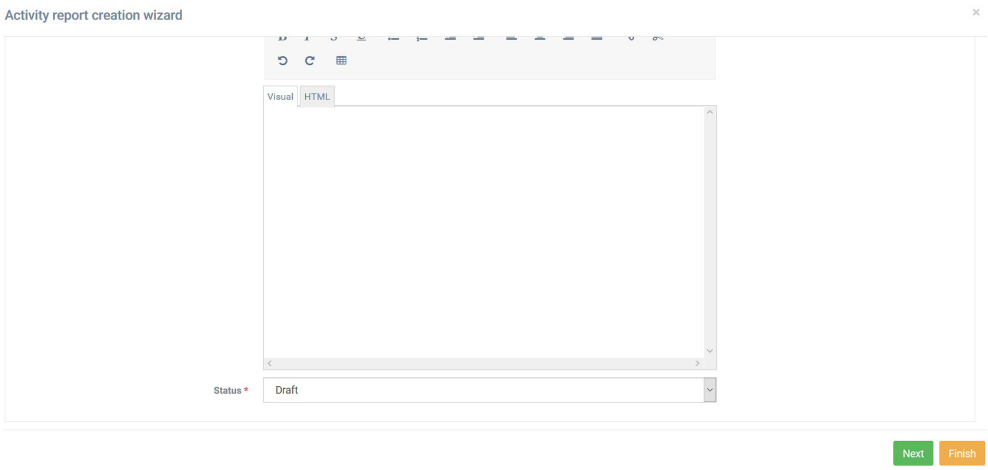


The process of creating an activity report is divided in 5 steps:

- Details: this step relates to the activity report itself.
- Linked Portfolio: Here you will link the portfolio(s) to the activity report. Doing so, you will be able to see the activity reports on the portfolio dashboard.
- Advices: What kind of advices did you give to the client. You can add more than one advice.
- Tasks: at this stage, you can create a task to be done by a specific person. It will create a task in Efficience and send an email to the person concerned.
- Documents: here you can upload a PDF document if needed.

NB: you can also attach email to your activity report. In order to do that, you just have to forward the email to a specific email address (Please contact Efficience Support to get this email address and for more technical settings).
To link an email to a client activity report, the subject field of your email must respect the following format: «**act:XXXXXXXXX:title you want for your activity report**». (Here **XXXXXXXXX** = portfolio number of the client you want to link the activity report to.)

5. Save your activity report by clicking on "Save".
6. Once your activity report saved, click on the green icon on the left of your activity report to edit it. At the "detail" stage, scroll down to the bottom of the page, and look after the field "Status". Here select "Validated" to finish the activity report.

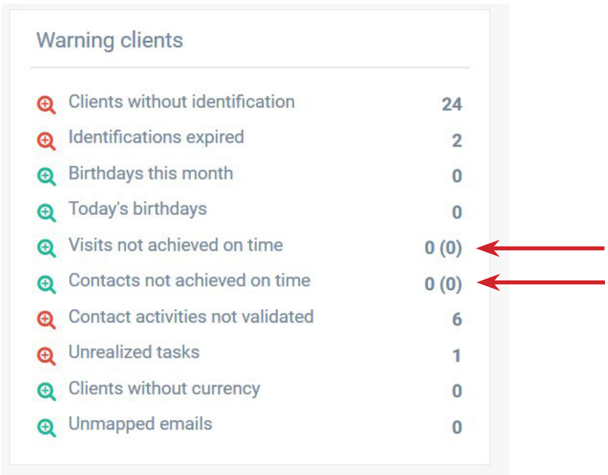


NB: If the activity report remains with the "draft" status, an alert will appear on the main dashboard asking you to validate the activity report.

7. Click on "Finish" to save the last changes and close the report.

NB: Be aware that once an activity report is validated, it is not possible anymore to edit or change anything in the report.

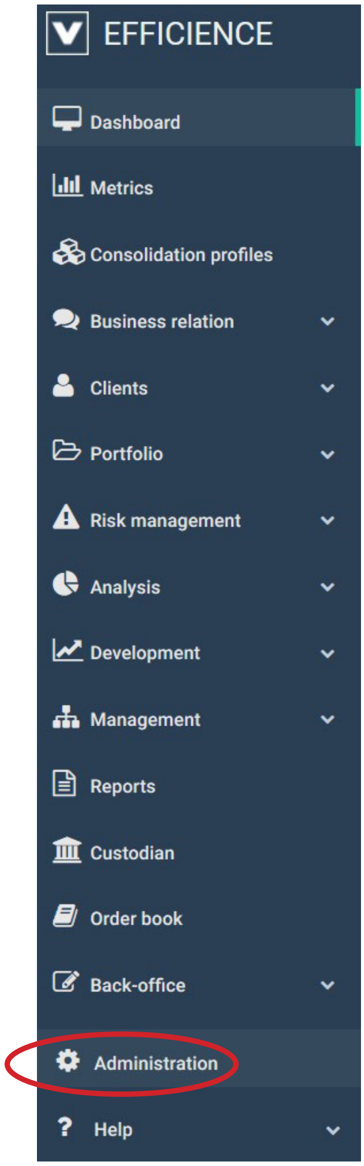
NB: If you don't create any activity report, Efficience will understand you never meet with your client. An alert will then appear on the dashboard that you should visit/contact your client.



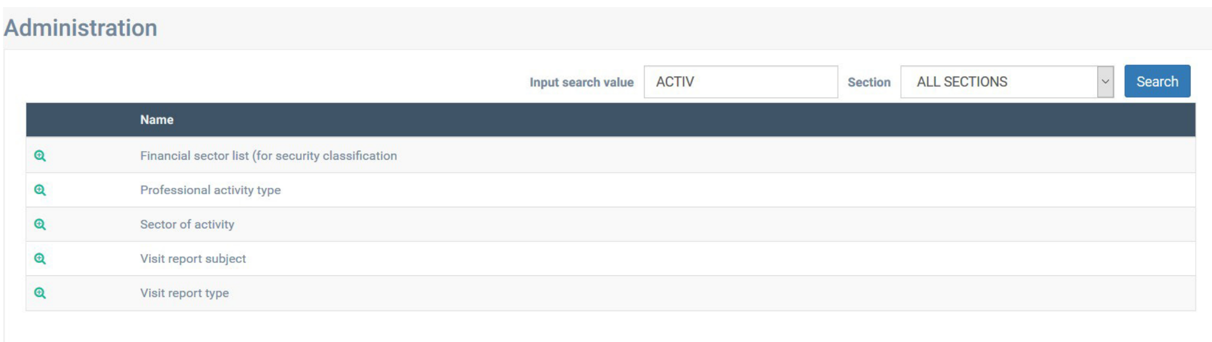
Add a new activity report type

By default, you have only few choices for an activity report type (Visit, Mail, Phone, What's App and Upload). If you want to add a new activity report type, you will have to set it up in the «Administration» dashboard.

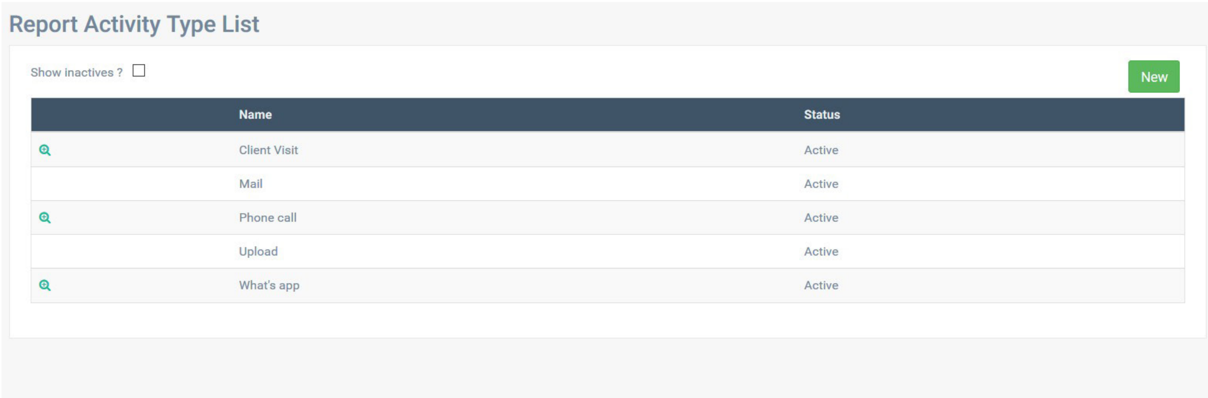
1. Click on "Administration" on the main menu of the application.



2. Use the keyword "Activity" (be careful, the keyword may change according to the language of the program you have set).



3. Click on the green magnifying glass next to "Visit report type" to reach the report type list.



4. Click on "New".
5. Fill in the form and click on "Save".

NB: the type dropdown can be used if the type of activity report is a visit or a simple contact. This will help with the 3 alerts on the main dashboard:

- Visits not achieved on time.
- Contact not achieved on time.
- Contact activities not validated.

NB: the process is the same if you want to add a new visit report subject.