

Action Taken - Samples

The administrator of the application can Add and/or Edit the Action Taken dropdown selections by going to Tools from the blue toolbar → System Setup → Settings → Third Column Item Action Taken.

Action Taken can be setup within Groups including the repetitive actions or no grouping with all the common/repetitive actions.

To enter common actions with no Groups enter the Action Description in the Description field and click the Add button. If you would like to setup a group please follow these steps.

Enter the Group description in the Group field, type in the first Description. Enter the Order if you want the Group(s) to display in a particular order (if applicable) click Add. To add additional descriptions select the Group from the Group drop down table and then type in the Description and click the Add button.

Group: ▼

Description: Order: Status: ▼

Group	Description
Left Message	LM: Waiting for the Owner to call back
	LM: confirming upcoming appointment with Vendor
	LM: Please return call in 24 hours
Group	Description
Callback	Waiting for Callback
	Review next steps in the process with Customer
Group	Description
Conversation	The trade about their lack of work ethic
	Homeowner to review the work order details
	Spoke to homeowner for additional details as follows:
Group	Description
Reschedule	Customer called they needed the appointment to be rescheduled.
	Dates don't work for the homeowner reschedule please
Group	Description
Reviewed	Reviewed by (employee name)
Group	Description
Access Notes	You must request access from Property Manager